

#### In This Guide

This guide demonstrates how to manage your shopping carts and requisitions in **CrimsonCorner**. This guide discusses:

- ✓ Assigning carts
- ✓ Modifying carts
- ✓ Copying requisitions
- ✓ Unassigning carts
- ✓ Consolidating carts
- ✓ Withdrawing requisitions

#### Procedure – Assigning Carts

1. Once items have been placed in a Shopper's shopping cart, the cart should be assigned to a Requester for further processing.
2. To assign a cart, navigate to the **Active Shopping Carts**. (See **Assigning a Cart** for more information.)
3. Click the **Assign Cart** button.
4. A popup window will appear and you should choose to **Search for an assignee**.
5. Another popup window will appear and you should type in the last name of your requester, click **Search** and then choose **Select** to the right of the Requester's name.
6. If this is a Requester that you will use in the future, click the **Add to Profile** box.
7. Once you have added a Requester to your profile, you will not need to search for them in the future. Instead, you will have an option to **Select from profile values** and you can click your Requester's name from there. Note that you can add multiple Requesters to your profile.
8. If you would like, you can enter in a note to your Requester regarding the order. This note will be visible in the email that they receive once you assign your cart to them.
9. Click **Assign**.
10. You will then receive a congratulations email confirming that your cart has been assigned to the Requester for action.

#### Procedure – Unassigning Carts

1. If a Requester is unable to process an assigned shopping cart, the Shopper can unassign the cart from them and resubmit it to a new Requester.
11. To unassign a cart, navigate to the **My Drafts Assign to Others** section. (See **Assigning a Cart** for more information.)
1. From here, you can see what carts have been assigned and who they are assigned to.
2. To unassign a particular cart, click **Unassign** to the right of the shopping cart.

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3. This unassigned cart will automatically become your active cart and you will be returned to the shopping cart page. From here, you can choose to assign your cart to another Requester.

#### Procedure – Modifying Carts

1. Once items are in your cart, you can modify the items from the **My Active Shopping Cart** screen.
2. Navigate to the **My Active Shopping Cart** screen by selecting from the main menu **Shop » My Carts and Orders » Open My Active Shopping Cart**.
3. The name on the shopping cart can be modified. Simply click in the **Name this cart** section and delete the default shopping cart name.
4. Type in a more appropriate shopping cart name. Remember that you can search for carts by their shopping cart name.
5. Once the new name has been entered, click the **Update** button below to save the new cart name.
6. Items in the cart can be manipulated. By clicking on the **Empty cart** button, all items in the cart will be deleted.
7. By selecting the **Remove** button, the particular line in the cart selected will be deleted.
8. Forms in the cart can be saved as **Favorites** and easily accessed again at a later time.
9. To save a form as a **Favorite**, click the **Add to Favorites** button on the form line.
10. A new window will appear and under **Step 1** you will have the option under **Item Nickname** to type in a description for the form.
11. Under **Step 2** you can choose a folder to put the form in. Select **New » Top level personal folder** and another popup will appear. From here you can give the folder a name and click **Save**.
12. When you are returned to the **Favorites** popup, click on **Submit** and then **Close**.

#### Procedure – Consolidating Carts

1. By selecting a particular line in the cart and clicking on the **More Actions** dropdown, the item can be moved to another cart to consolidate orders.
2. Simply click the **More Actions** button and select **Move to Another Cart**.
3. A new popup window will appear and you can select which cart you want to move the item into.
4. Select the cart and click the **Move** button at the bottom of the screen and then **Close** the window.

#### Procedure – Copying Requisitions

1. To copy a previously submitted requisition, navigate to the requisition and click on the requisition number. (See **Document Search** for more information on locating a requisition.)
2. From the **Available Actions** dropdown menu, choose **Copy to New Cart** and click **Go**.
3. The requisition will be placed in a new shopping cart.

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4. Please note that when copying a requisition all elements of the requisition are copied including accounting codes and shipping information.

#### Procedure – Withdrawing Requisitions

1. Requisitions can be withdrawn from the approval workflow if they have not been fully approved and turned into a Purchase Order.
2. To withdraw a previously submitted requisition, navigate to the requisition and click on the requisition number. (See **Document Search** for more information on locating a requisition.)
3. From the **Available Actions** dropdown menu, choose **Withdraw Entire Requisition** and click **Go**.
4. A popup menu will appear asking you to enter in a reason for withdrawal. Enter in a reason and click the **Withdraw Enter Requisition** button.
5. The requisition will be withdrawn from the workflow process.