Processing Assigned Shopping Carts
FOR REQUESTERS
What’s different in UD Exchange?

Requester Role

Previously, UD employees used Procurement Cards to purchase goods & services online, verifying and submitting them for approval after the purchase was made.

In UD Exchange, employees shop for goods and services, place them in a Shopping Cart, and assign the cart to a department Requester. The Requester then reviews the cart for all necessary details, ensures the purchases are allocated correctly, then submits the cart for approval, negating the need for verification and reconciliation after the fact.
Processing Assigned Shopping Carts

• Employees with Shopper access in UD Exchange must *assign their shopping carts to a Requester for processing.*
• If you are a Requester, you will receive an email notification from UD Exchange once a Shopping Cart is assigned to you.
• This guide discusses:
  • Locating your assigned shopping carts
  • Processing and submitting assigned shopping carts
  • Returning assigned shopping carts
  • Deleting assigned shopping carts
Access your assigned shopping carts by using your **Action Items** list.

1. Click **Action Items** at the top of your screen
2. Select **Carts Assigned To Me**.
On the Assigned Carts tab, click on the Shopping Cart Name.

You can also access this from the Shopping Menu and then “My Carts and Orders”
To Process and Submit the Shopping Cart As Is:
Begin by clicking the Proceed to Checkout button.

Note: you can modify all the same things from within the requisition!
Cart status will be in **Draft**. Complete any required information such as SpeedType and Shipping Address.

- Refer to the [Adding Details to Shopping Carts](#) guide for further details.

Once complete, Click the **Place Order** button to submit the Shopping Cart for approval.

Anything requiring updating will be shown here.
Modifying Shopping Carts:
Modifications can be made to a Shopping Cart when necessary. For example, items can be added or removed and accounting information can be edited.

- Refer to the Modifying Shopping Carts guide for further details.
To Return a Shopping Cart:
If you need the Shopper to make modifications to the Shopping Cart, you can return it. Click the Return Cart button.
1. Enter a note to the Shopper in the Return Cart pop-up window.
2. Click Return.

Your note will be included in the email notification sent to the Shopper from UD Exchange.
To Delete a Shopping Cart:
Deleting the shopping cart will completely remove it from UD Exchange. The order will no longer be accessible by anyone...including the Shopper.
1. On the **Assigned Carts** tab, locate the shopping cart.
2. Using The Action menu, select **Delete**

You can also return a cart from here without having to open it, such as if you see a name of someone who shouldn’t assign to you in your cart queue.
A pop-up box appears for you to enter a note regarding the deletion. Click **OK**. Your note will be included in the email notification sent to the Shopper from UD Exchange.
Resources

[link to Procurement Services]
procurement@udel.edu

See also: “Adding Financial Information to Shopping Carts”
and “Modifying Shopping Carts”