Assigning and Unassigning Shopping Carts to and from Requesters

Revised 6/1/2023
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- Shoppers in UD Exchange must assign their shopping carts to a Requester for processing.
- Shoppers can unassign a shopping cart from a Requester to:
  - Update the shopping cart
  - Assign a different Requester to the shopping cart for processing
As a Shopper in UD Exchange:

- You can **prepare** your own orders.
- Employees with the Shopper role can **prepare** their own orders but will have to **assign** their orders to a Requester to review and submit them on their behalf.
- A Shopper can assign their order to a Requester while it is still a Shopping Cart or after they have clicked Proceed to Checkout to create their draft requisition.
- Business processes may vary by department/business unit. Some departments might expect Shoppers to complete all required information on a draft requisition before assigning it to a Requester while others might instruct their Shoppers to only complete basic cart information and add necessary attachments prior to assigning the order to a Requester who will complete the financial details.
- This guide will illustrate how to assign your carts/requisitions to a Requester, and how to unassign them if needed!
1. Access your active cart by clicking the shopping cart link located in the upper right corner of your screen.

2. Click View My Cart.
When your order is ready, click the **Assign Cart** button.
The **Assign Cart** pop-up window will appear.

You can select a Requester (also referred to as an assignee) using one of three possible options.

The options available to you will depend on how you have set up your UD Exchange profile.
Preferred assignee: If you have identified a preferred Requester in your UD Exchange profile, that person’s name will automatically appear.
Select from Profile Values: If you have identified multiple Requesters in your UD Exchange profile, and you want to assign your shopping cart to one of them:

Click the Select menu.

Choose the appropriate Requester from the list that appears.
Search for an assignee: If you have not identified Requesters in your UD Exchange profile, or if you want to assign your shopping cart to a Requester not identified in your profile:

Select the **Search** link.
The **User Search** pop-up window will appear.

Search for the Requester by last name (or other information if desired). Click **Search**.

**NOTE:** User search will show all users, not only Requesters!
From the list of results, select the appropriate Requester by clicking ‘+’ on the line of the person's name.
Check the **Add to Profile** checkbox if you plan to assign shopping carts to this Requester again.
1. Once you have selected a Requester, you can enter comments to your Requester in the **Note To Assignee** box. The comments will be part of the email notification sent to the Requester.

2. Click **Assign**.
A confirmation message appears, along with a summary of your request. An email notification of the assignment is sent by UD Exchange to the Requester. You will receive an email notification from UD Exchange when the Requester submits your shopping cart.
How to unassign a shopping cart from a Requester

Note: You should notify your Requester when you unassign a shopping cart – your Requester will not receive an email notification.
Use your side navigation bar to go to **Shop > My Carts and Orders > View Carts.**
On the **Assigned Carts** tab, locate the shopping cart you want to unassign. Click the **Action** drop-down menu. Click **Unassign**.
Your shopping cart will open.

If needed, update the shopping cart.

When ready, **Assign** your shopping cart to the appropriate Requester.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Adding Requesters to Profile