**Purchasing Goods & Services**

**Previous Practice:**
Employees with a Procurement Card could make purchases online or in-store with strategic partners such as Amazon. Employees without a Procurement Card would need to ask an employee with a Procurement Card to purchase on their behalf. All purchases were verified and allocated *AFTER* purchase.

**New with UD Exchange:**
Any employee can purchase by simply filling an online shopping cart in UD Exchange and assigning it to an employee with the authority to allocate and submit the purchase request. All purchases are reviewed and allocated *BEFORE* the purchase is made.
Assigning and Unassigning Shopping Carts to and from Requesters

• 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
How to assign a shopping cart to a Requester
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.
If you do not need to make any changes to the items in your shopping cart, you are ready to assign your shopping cart to a Requester.

Click Assign Cart located in the upper right corner of the page.
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:
1. Click the Select dropdown arrow
2. Choose the appropriate Requester from the dropdown 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** hyperlinked in blue.
The User Search pop-up window will appear

1. Search for the Requester by last name (and other information if desired) and
2. 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.

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<th>User Name</th>
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<th>Action</th>
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<td>McCabe, Lauren</td>
<td>702407632</td>
<td><a href="mailto:ud-mart@udel.edu">ud-mart@udel.edu</a></td>
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<tr>
<td>McCabe, Margot</td>
<td>700586502</td>
<td><a href="mailto:ud-mart@udel.edu">ud-mart@udel.edu</a></td>
<td>+1 302-831-2162</td>
<td>+</td>
</tr>
</tbody>
</table>
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 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 processes 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** section, locate the shopping cart you want to unassign.

1. Click the **Action** drop-down menu
2. Click **Unassign**
Your shopping cart will appear.

If needed, update the shopping cart.

When ready, **Assign** your shopping cart to the appropriate Requester.
Resources

See Also, “Adding Requesters to Profile”

Procurement Services
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