

UNIVERSITY OF DELAWARE[®] EXCHANGE

Processing Assigned Shopping Carts

Last revised 2/9/2023

Processing Assigned Shopping Carts

- Employees with the Shopper role 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





Organization Message

Welcome to the University of Delaware Exchange Test Site!

Here you'll find the goods and services you need. The greatly expanded University of Delaware Exchange provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers.

Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides.

Quick Links

- UD Exchange How To Guides
- How Do I Buy _____ ???
- Commodity Code-Account Crosswalk
- Non-PO Payment Matrix
- Non-Catalog Item
- Request New Supplier
- Request Contract

Action Items

My Assigned Approvals

Carts Assigned To Me

My Resources

Product Release Library | procurement@udel.edu Site Map

Locate your assigned shopping carts by using your Action Items list.

- Click Action Items **Flag icon** at the top of your screen
- Select **Carts Assigned To Me.**

Alternatively, you can click the Shopping Menu and then My Carts and Orders.

Catalog & Forms Showcase (Under D

Procurement Forms

Non-PO Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

Waiver of Bid Request

3357878	cleaning supplies	Drafts Assigned To Me	10/13/2021	70.11 USD
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Cart Management

Create Cart ?

Draft Carts

Assigned Carts ▾

Assign Substitute

▶ Filter Assigned Carts

Type ▲		Shopping Cart Name ▲	Cart Description	Date Created ▲	Total ▲	Created By ▲	Assigned To ▲	Action
Normal		Participant		4/8/2021	4,880.00 USD	Kristen Pickering	Robert Requester	View ▾
Normal	Active	cleaning supplies ←		10/13/2021	70.11 USD	Aisha Emory	Robert Requester	View ▾

On the **Assigned Carts** tab, click on the **Shopping Cart Name**.



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Shopping Cart • Shopping Cart

Return Cart Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Details

For Robert Requester

70.11 USD

70.11 USD

To Process the Shopping Cart as is:

Click the **Proceed to Checkout** button to generate the draft requisition.

To Make Modifications to the Cart Prior to Proceeding to the Draft Requisition Page:

Refer to the [Modifying Shopping Carts](#) guide for instructions regarding modifications such as adding items and changing quantities in the cart.

If you discover that you need to make changes later, you will also be able to do so from the draft requisition.

4 items

PHILIP

^ SUPP

Cont

Quot

Item

1	NON ACID BOWL CLEANER PROCO #2	RX77	CS	19.61	1	CS	19.61	...	□
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ITEM DETAILS

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Requisition • 3357878

Summary PO Preview Comments Attachments History

General		Shipping	
Cart Name	cleaning supplies	Ship To	
Description	no value	UNIVERSITY OF DELAWARE	Accounts Payable
Priority	Normal	Attn: Robert Requester	accounts payable@udel.edu
Prepared by	Robert Requester	Room: lobby	222 South Chapel Street
Prepared for	Sam Shopper	150 ACADEMY STREET	Newark, DE 19716
		COLBURN LAB	United States
		NEWARK, DE 19716	
		United States	

Check the sidebar for any required information that needs to be completed.

Draft

Correct these issues.
You are unable to proceed until addressed.

Required: Account Code (Line 3)

Total (70.11 USD)

Subtotal 70.11

70.11

The requisition status will be in **Draft**.

Complete any required information such as Shipping Address and SpeedType.

Additional References:

- [Adding Details to Shopping Carts](#)
- [Adding Financial Information to Requisitions](#)

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

Accounting Codes

Work Order Cost Share

PR Validation Future

Cart Management

Create Cart ?

Draft Carts

Assigned Carts 🗑️

Assign Substitute

▸ Filter Assigned Carts

Type ▾	Shopping Cart Name ▾	Cart Description	Date Created ▴	Total ▴	Created By ▾	Assigned To ▾	Action
Normal	Active Participant		4/8/2021	4,880.00 USD	Kristen Pickering	Robert Requester	View ▾
Normal	cleaning supplies		10/13/2021	70.11 USD	Aisha Emory	Robert Requester	View ▾ Return ← Delete

To Return a Shopping Cart:

A Shopper may have assigned their cart to you in error.

On the **Assigned Carts** tab, locate the shopping cart.

Using the Action menu, select **Return**.

Shopping Cart • Shopping Cart

Return Cart Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name Participant

Description

Multi-Invoice/Payment

Details

For Robert Requester

Estimate (4,880.00 USD)

Subtotal	4,880.00
Total	4,880.00 USD

You can also return a cart to a Shopper after you have opened it if you see modifications are needed.

Click the **Return Cart** button.

Contract	no value	PO Number		To Be Assigned	
Quote number	<input type="text"/>				
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 test PO	5684AA	EA	4,880.00	1 EA	4,880.00



Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name Participant

Description

Multi-Invoice/Payment

Return Cart

Return Cart To: Kristen Pickering

Note:

1000 characters remaining [expand](#) | [clear](#)

Return Cancel

Details

For Robert Requester

Estimate (4,880.00 USD)

Subtotal	4,880.00
Total	4,880.00 USD

1 Item

CARL ZEISS INC						
^ SUPPLIER DETAILS						
Contract						
Quote number						
Item						
1	test PO	5684AA	EA	4,880.00	1 EA	4,880.00
^ ITEM DETAILS						

Enter a note to the Shopper in the **Return Cart** pop-up window.

Click **Return**.

Your note will be included in the email notification sent to the Shopper from UD Exchange.

Cart Management

Create Cart ?

Draft Carts Assigned Carts

Assign Substitute
> Filter Assigned Carts

Type	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	Active Participant		4/8/2021	4,880.00 USD	Kristen Pickering	Robert Requester	View
Normal	cleaning supplies		10/13/2021	70.11 USD	Aisha Emory	Robert Requester	View Return Delete

- View
- Return
- Delete

To Delete a Shopping Cart:

On the **Assigned Carts** tab, locate the shopping cart.

Using the Action menu, select **Delete**

Deleting a shopping cart will completely remove it from UD Exchange. The order will **no longer be accessible by anyone**...including the Shopper.



Attach Note — Mozilla Firefox (Private Browsing)

Shop ▶ My Carts

Cart Manager Close

CartNameParticipant

Specify a reason for deleting this Assigned Cart.

Maximum allowed characters are 1000
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

OK Cancel

Create Cart ?

Created	Total	Created By	Assigned To	Action
21	4,880.00 USD	Kristen Pickering	Robert Requester	View
2021	70.11 USD	Aisha Emory	Robert Requester	View

A pop-up box appears for you to enter a reason for the deletion.

Click **OK**.

Your note will be included in an email notification sent to the Shopper from UD Exchange.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Adding Financial Information to Requisitions](#)
- [Modifying Shopping Carts](#)

