

Step-by-Step Guide

Assigning Shopping Carts to Requestors

In This Guide

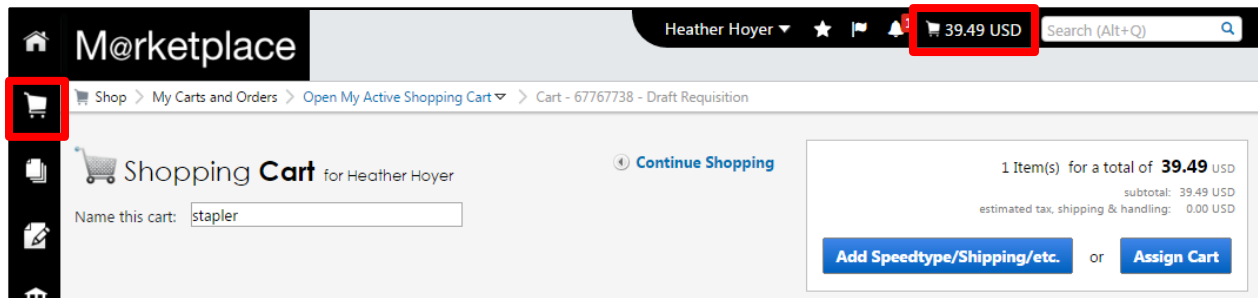
Those with Shopper access in CU Marketplace **must** assign their shopping carts to a Requestor for processing.

This guide discusses:

- ✓ Assigning shopping carts to Requestors
- ✓ Entering comments

Procedure

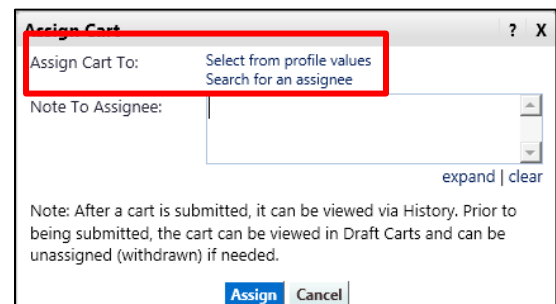
1. Begin by accessing CU Marketplace via [your campus portal](#). Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **CU Marketplace**.
2. Access your active cart by clicking the shopping cart link located in the upper right corner of your screen and clicking the **View My Cart** button.



Alternately, you can use the navigation bar on the left side of your screen and go to **Shop > My Carts and Orders > Open My Active Shopping 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 Requestor.

3. Click the **Assign Cart** button located in the upper right corner of the page.
4. The **Assign Cart** pop-up window will appear. Select a Requestor (also referred to as an assignee) using one of three possible options. The options appear under the **Assign Cart To** area, and what you see depends on how you have set up your CU Marketplace profile.
 - **Preferred assignee:** If you have identified a preferred Requestor in your CU Marketplace profile, that person's name will automatically appear here.



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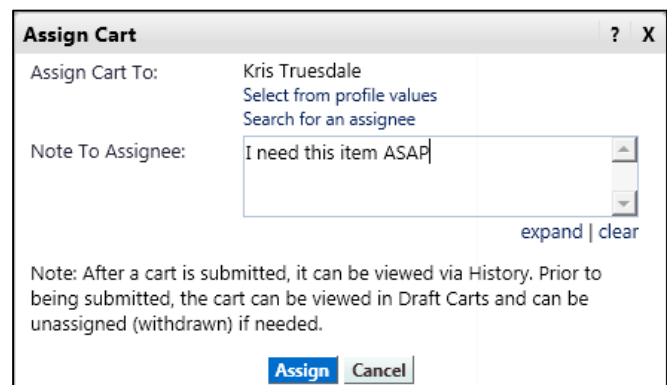
- **Select from profile values:** If you have identified Requestors in your CU Marketplace profile – and you want to assign your shopping cart to one of them – click the **Select from profile values** link. Choose the appropriate Requestor from the dropdown list that appears.
- **Search for an assignee:** If you have not identified Requestors in your CU Marketplace profile – or if you want to assign your shopping cart to a Requestor not identified in your profile – click the **Search for an assignee** link.

Search for the Requestor by last name (and other information if desired) and click the **Search** button. From the list of results, select the appropriate Requestor by clicking anywhere on the line of the person's name. Check the **Add to Profile** checkbox if you plan to assign shopping carts to this Requestor again.

For guidance on identifying Requestors in your CU Marketplace profile, refer to the Step-by-Step Guide [Adding Requestors \(Assignees\) to Your CU Marketplace Profile](#).

5. If desired, enter comments to your Requestor regarding this shopping cart in the **Note To Assignee** box. The comments will be part of the email notification sent to the Requestor.

6. Click the **Assign** button.



The screenshot shows a dialog box titled "Assign Cart" with a close button (X) and a help button (?). It contains the following elements:

- Assign Cart To:** A dropdown menu showing "Kris Truesdale" with two links below it: "Select from profile values" and "Search for an assignee".
- Note To Assignee:** A text area containing the text "I need this item ASAP". To the right of the text area are "expand" and "clear" links.
- Note:** A paragraph of text stating: "Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed."
- Buttons:** "Assign" and "Cancel" buttons at the bottom.

7. A congratulatory message appears, along with a summary of your request. An email notification of the assignment is sent by CU Marketplace to the Requestor. You will receive email notification from CU Marketplace when the Requestor processes your shopping cart.