



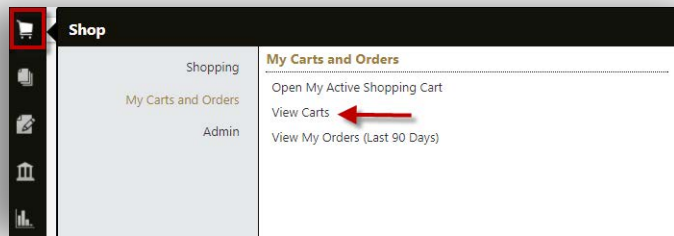
Toolbox: Utilizing the Shared Cart Feature



The shared cart feature offers Deacon Depot users the ability to share one cart among multiple users for easier order creation.

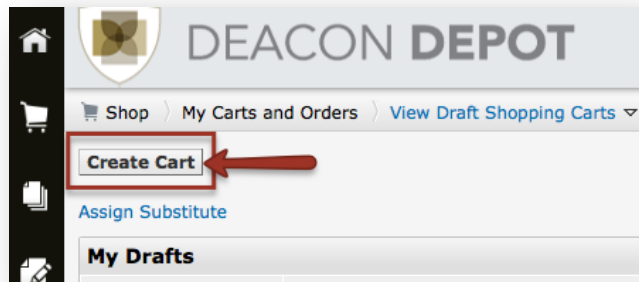
To create a shared cart:

From the home screen, select carts and the draft carts sub-tab.



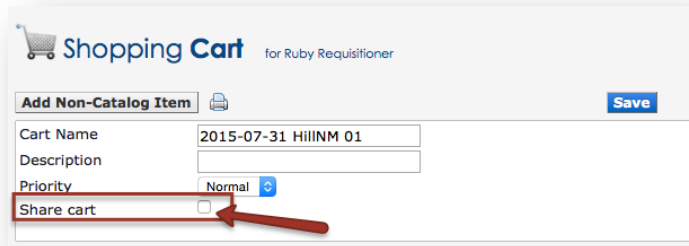
Click Create Cart to start a new shared cart.

Note: If you already have another active or draft cart that you are working on that needs to be shared, you can share that cart without having to create a new one (see next step).



Update your cart name if necessary.

To be able to share the cart you've created, click the checkbox to the right of the words 'Share cart'.



Once 'Share cart' is checked, a drop-down will display to allow you to select the group with whom you want to share your cart.

The 'View Members' link displays a pop-up box that lists the members of the selected group. You can email members of the group from this screen, if desired.

Note: Once a cart has been shared with other users, it will display in a locked mode on their draft carts sub-tab under the heading 'Drafts Shared With Me'.

After all setup steps are complete, click 'Save' and 'Unlock' to save your changes and prepare the cart for items to be added by group members.

Shopping Cart for Ruby Requisitioner

[Unlock](#) [Add Non-Catalog Item](#)

Cart Name:

Description:

Priority:

Share cart: ☒ [View Members](#)

[Save](#)

User Group Members: Group C ?

Member Name	Email Address
Hill - Sys Admin, Natalie	hillnm@wfu.edu
Requisitioner, Randy	hillnm@wfu.edu
Requisitioner, Ruby	rogersjh@wfu.edu

[Go](#)

[Close](#)

At this point, items can be added to a cart as usual by any member in the shared cart group. If you have multiple draft carts, it is important to be sure that the shared cart is the active cart before adding items. To verify, select the Shop menu icon (shopping cart) >> My Carts and Orders >> Open My Active Shopping Cart. You should see the words Shared Cart above the line item details.

Shared Cart

[Lock to Edit Cart](#)

Cart Name: **Jen's Shared Cart**

Description: *no value*

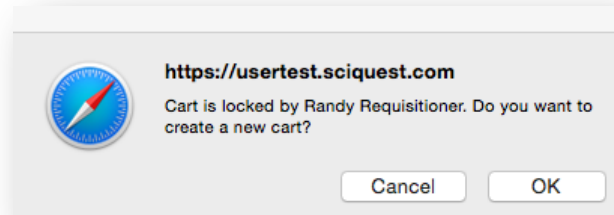
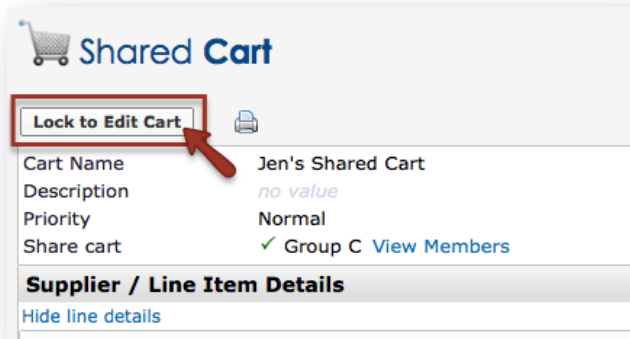
Priority: **Normal**

Share cart: ☒ **Group C** [View Members](#)

Cart Lock Feature:
When adding items from a punchout site, the system will lock the cart automatically to keep other users from editing while a group member is in a punchout session.

Any user can click 'Lock to Edit Cart' to make changes, or add elements for checkout like shipping, notes and attachments, and accounting code information. When a cart is locked, other users cannot add items to the cart until it is unlocked.

Unlock the cart by clicking the 'Update and Unlock' button. Locks will automatically time out after 5 minutes.

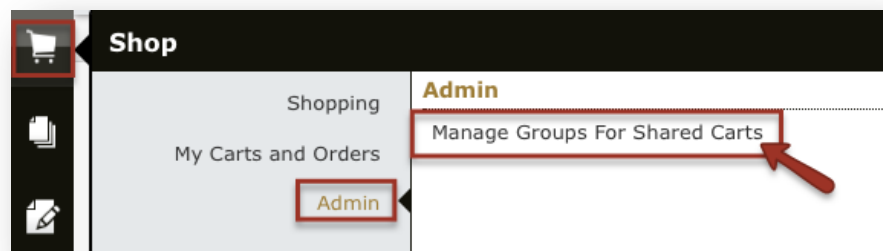


- Once it is time to proceed to checkout, the cart must be locked by the person designated to complete the cart. Once locked, the process to checkout and either assign the cart or place the order are the same as usual.

Creating and Maintaining User Groups

Depending upon your access, you may have the ability to create and maintain shared cart user groups. If you have this access, you will find the 'Manage Groups For Shared Carts' link under the Admin sub-menu of the Shop menu.

Note: a user must be a member of a shared group to have the Share Cart checkbox.



Once the 'Manage Groups for Shared Carts' screen displays, new groups can be created, and users can be added or removed from current groups.

To create a new group, click 'Create New Group'.

A new set of fields will display on the right. Give your new, shared cart group a name and add a description, if desired.

Click 'Save' to create your new, shared cart group.

The screenshot shows the 'Create New Group' interface. On the left, under 'My Groups', there is a list of 'Shared Cart User Groups' with a note 'No shared cart user groups available'. On the right, the 'New Shared Cart User Group' form is displayed. It includes fields for 'Name' (highlighted with a red box), 'Description' (with a 250-character limit and 'expand | clear' links), and an 'Active' checkbox which is checked. Below these is the 'User Group Members' section with a link to 'Add access for: department | user'. A red arrow points to the 'Save' button at the bottom right.

Once the group has been saved, it will display on the left in the list of Shared Cart User Groups. On the right, you will now have the ability to add other users or departments to the group, or change the group owner.

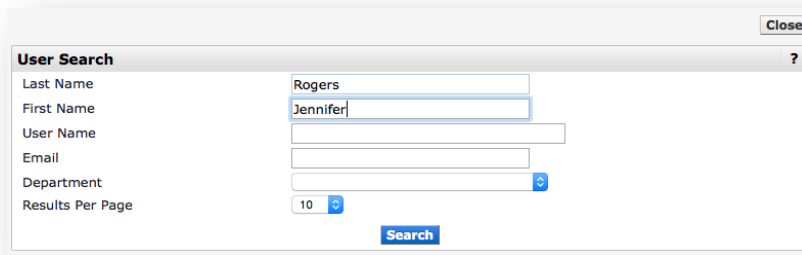
The screenshot shows the 'Edit Selected Shared Cart User Group' interface. On the left, the 'Shared Cart User Groups' list now includes 'New Test Group' with 'Requisitioner, Randy' as the owner (highlighted with a red box). On the right, the 'Edit' form for 'New Test Group' is shown. It includes fields for 'Name', 'Description', 'Active' (checked), and 'Owner' (Requisitioner, Randy). The 'User Group Members' section shows 'Add access for: department | user'. Below this is a table with columns 'Users' and 'Action'. The 'Users' column lists 'Requisitioner, Randy (HILLnm)' and the 'Action' column has a 'Remove' link. A 'Save' button is at the bottom right.

Add individual users or departments to the group by clicking the appropriate link under the words 'User Group Members'.

Clicking 'department' displays a drop-down for you to select the desired department. Only one department at a time can be selected.

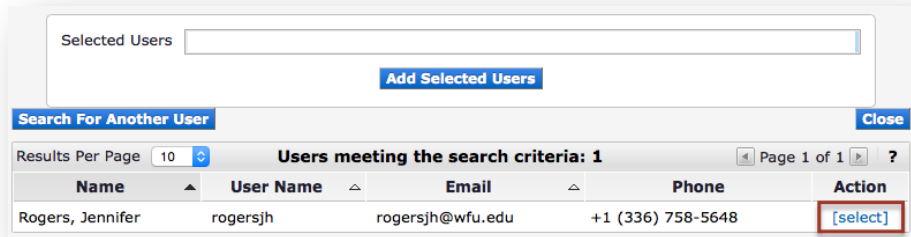
This screenshot shows the 'Edit Selected Shared Cart User Group' form with the 'User Group Members' section expanded. A red box highlights the 'Add access for: department | user' link, with red arrows pointing to 'department' and 'user'. Below this is a table with columns 'Users' and 'Action'. The 'Users' column lists 'Requisitioner, Randy (HILLnm)' and the 'Action' column has a 'Remove' link. A 'Save' button is at the bottom. To the right, a dropdown menu is open, showing a list of departments: 101 Belle Vista Ct (Carlyle), 109 Rosedale Drive, 1109 Polo Road, 1115 Polo Road, 1125 Polo Road, 1141 Polo Road, 1145 Polo Road, 1157 Polo Road, 1210 Polo Road, Academic Initiatives - Provost, Academic Leadership, Accounting Society, and Admissions Surplus Reserve.

1. Clicking user displays a user search dialog box. Search for the user by name.
2. When the search results display, click select to the right of the name to add them to the list above.
3. At this point, you can search for another user or add the selected users to the group by clicking 'Add Selected Users'.



User Search [Close] ?

Last Name: Rogers
 First Name: Jennifer
 User Name:
 Email:
 Department:
 Results Per Page: 10
 [Search]

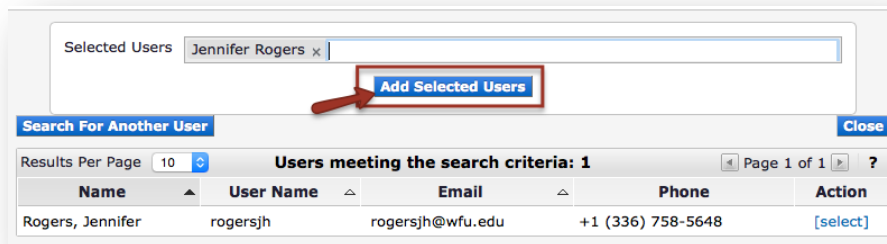


Selected Users:
 [Add Selected Users]

Search For Another User [Close]

Results Per Page: 10 **Users meeting the search criteria: 1** Page 1 of 1 ?

Name	User Name	Email	Phone	Action
Rogers, Jennifer	rogersjh	rogersjh@wfu.edu	+1 (336) 758-5648	[select]



Selected Users: Jennifer Rogers x
 [Add Selected Users]

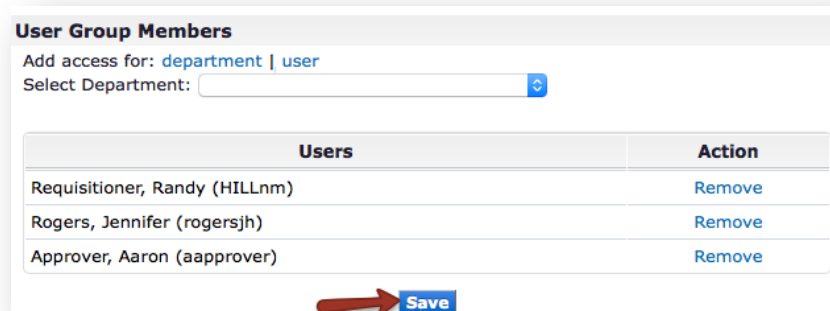
Search For Another User [Close]

Results Per Page: 10 **Users meeting the search criteria: 1** Page 1 of 1 ?

Name	User Name	Email	Phone	Action
Rogers, Jennifer	rogersjh	rogersjh@wfu.edu	+1 (336) 758-5648	[select]

Once all users have been added, click save.

When necessary, remove users or departments by clicking the remove link to the right of their name.



User Group Members

Add access for: department | user
 Select Department:
 [Save]

Users	Action
Requisitioner, Randy (HILLnm)	Remove
Rogers, Jennifer (rogersjh)	Remove
Approver, Aaron (aapprover)	Remove