Creating and Assigning a Shopping Cart in BuyWays

A Shopper in BuyWays may create and fill a shopping cart only with items from one of the online catalog vendors displayed in the vendor showcase on the Home/Shop page. The Shopper then assigns the cart to a departmental Requisitioner, who completes the requisition by adding commodity codes, speedtypes and account codes and submits it for budget validation and approval.

Before you create a shopping cart, follow the instructions in the Updating Your Profile job aid to enter your shipping address and to set up a default assignee, so that you will not have to search for your departmental Requisitioner each time.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Log in to BuyWays  
- Navigate to UMass BuyWays (www.umb.edu/it > Getting Services > Campus Administrative Systems)  
- Click on BuyWays Production in the center of the page.  
- Enter your campus email user ID (firstname.lastname only) and password.  
- Select the Boston campus.  
- Click Login. |

The BuyWays Home/Shop page will open.
## Creating and Assigning a Shopping Cart in BuyWays

### Step 2. Create a New Cart and Give It a Name

Point your mouse to the shopping cart icon on the left border of the page. Point to My Carts and Orders, then click on Open My Active Shopping Cart.

![Shopping cart icon](image)

Click **Create Cart** in the top left corner of the page.

**Important:**
A new cart will open, identified by default with today’s date and your employee ID. 
Click in the default name to **rename** the cart or to add a meaningful identifier.

![Shopping Cart](image)

Click **Update**.

This cart will now become your **active** cart, displayed in the upper right corner of the page.

Click on the **Start Shopping** link in the center of the page.

You will be returned to the Home/Shop page.
### Creating and Assigning a Shopping Cart in BuyWays

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 3.   | **Select the Catalog Vendor**  
Click on the vendor you wish to use in the Showcased Vendors section.  
Be alert for a security message asking you if you wish to view non-secure data. The text of the message will vary with your web browser. **Select the appropriate response to view all data, not just the data delivered securely.**  
The supplier’s web site will open, displaying products with special UMass contract pricing. |
| 4.   | **Fill the Vendor’s Shopping Cart**  
Since each vendor's web site will be unique, you will need to identify how to search for an item, adjust the quantity, add an item to your shopping cart, view the shopping cart, check out and return to BuyWays.  
Note: If you would like to exit from the vendor's web site without completing your shopping, click on **Cancel Punch-out** in the upper right corner.  
When you have finished shopping, click on the vendor's link to check out.  
You will return to your BuyWays shopping cart. |
| 5.   | **Review Your Line Items**  
Make any final adjustments to your shopping cart.  
To make changes to a shopping cart filled in the vendor’s punch-out site, you are required to return to the vendor’s web site.  
Click on the **MODIFY ITEMS** link above the first line item at the top left, as shown below:  

| The item(s) in this group was retrieved from the supplier’s website. What does this mean?  
Need to make changes? MODIFY ITEMS  | VIEW ITEMS  
Item(s) was retrieved on: 5/7/2013 10:07:50 AM  
Line(s): 1, 2 |

Follow the vendor’s instructions to change your order and return to BuyWays.  
Click **Proceed to Checkout** |
## Step 6: Shipping

The checkout workflow bar will be displayed.

Since you have already set up two shipping addresses in your profile, you need to select the appropriate shipping address.

Click **Edit** in the Shipping box in the center of the page.

The Ship To box will appear.

<table>
<thead>
<tr>
<th>Shipping address</th>
<th>select from your addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop Delivery</td>
<td>UMB - Central Receiving</td>
</tr>
</tbody>
</table>

Click the **select from your addresses** dropdown menu.

Click the appropriate address. If you are purchasing goods from OfficeMax, you must select Desktop Delivery. For other catalog vendors, select Central Receiving.

Click **Save**.
### Assign Your Shopping Cart

Click on **Assign Cart** at the top right of the page. The Assign Cart box will appear.

If you have set up a preferred assignee in your Profile, that person will automatically appear.

![Assign Cart](image)

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.

You may enter a note for the assignee, if you wish. Click **Assign**.

If you wish to select another requisitioner or if you have not set up your preferred assignee, click **Search for an assignee**.

Search for your departmental requisitioner by name and click Select in the search results.

You may enter a note for the requisitioner in the text box.

Click **Assign**.

A summary of your shopping cart will appear.
Creating and Assigning a Shopping Cart in BuyWays

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Cart Assigned</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Next Steps</strong></td>
</tr>
<tr>
<td></td>
<td>You can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart</td>
</tr>
<tr>
<td></td>
<td>- Search for another item</td>
</tr>
<tr>
<td></td>
<td>- Check the status of an order</td>
</tr>
<tr>
<td></td>
<td>- Return to your home page</td>
</tr>
<tr>
<td></td>
<td>- Create new draft cart</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition number</td>
</tr>
<tr>
<td>Cart name</td>
</tr>
<tr>
<td>Requisition total</td>
</tr>
<tr>
<td>Number of line items</td>
</tr>
</tbody>
</table>

The requisitioner will be notified by email that you have assigned the cart. The requisitioner will complete and submit the requisition. You may receive an email from the vendor indicating that your order has been received. You may receive an email from the vendor indicating that your order has been filled.
Making Changes to a Shopping Cart

Before the requisitioner submits the requisition, you may make changes to the cart or withdraw it completely.

- On the Home/Shop page, point your mouse to the **shopping cart icon** on the left.
- Point to My Carts and Orders and click on View Draft Shopping Carts.

  - Under My Drafts Assigned to Others, your list of draft carts will appear.
  - Under the View Cart tab, click on the printer icon to print the requisition.
  - Click **Unassign** to remove the cart from the worklist of the requisitioner.
  - Once you have unassigned the cart, it will be displayed. You may change the quantity, remove individual lines, empty the cart or assign it again to the same or another requisitioner.
## Tracking Your Orders

Once your shopping cart has been submitted as a requisition, you can review it:

- On the Home/Shop page, point your mouse to the **shopping cart icon** on the left.

- Point to My Carts and Orders and click on **View My Orders (Last 90 Days)**.

- Click on the requisition number to display your requisition.

- To view approvals, click on the gray PR Approvals tab at the top left.

- If the Initial Validation is unsuccessful, the requisitioner will be required to enter a different Speedtype.

- To see a list of approvers at any step in the workflow, click View Approvers.

- To view details of the requisition’s workflow, click on the gray History tab at the top left.