

Overview

Use this instruction guide to consolidate shopping carts into one cart to process a single requisition to a vendor. Some vendors, such as Mister Paper/Office Depot, offer incentives for orders over a certain amount, such as free shipping for orders for more than \$50.00. Consolidating smaller orders will save UF and your department money and is more sustainable because it reduces deliveries. This instruction guide is for Requestors (those with the UF_N_MKT_REQUESTOR role). Please keep in mind that requisitions with more than one billing, shipping, PCard and vendor may generate more than one purchase order.

Access myUF Marketplace

1. Navigate to <http://my.ufl.edu/> and logging in with your Gatorlink username and password.
2. Click **Nav bar > Main Menu > My Self Service > myUF Marketplace**.

To view your current carts:

1. Click the **Shopping Cart** icon on the left side of the page > Click **My Carts and Orders > View Draft Shopping Carts**.

The screenshot shows the myUF Marketplace interface. On the left, there is a 'Shop' sidebar with a 'My Carts and Orders' link. The main content area shows a 'My Carts and Orders' section with three options: 'Open My Active Shopping Cart', 'View Draft Shopping Carts' (highlighted with a red circle and an arrow), and 'View My Orders (Last 90 Days)'. Below this, there is a table of requisitions with columns for Requisition Name, Requisitioner, Requisition Date/Time, and Requisition Total.

| Requisition Name | Requisitioner | Requisition Date/Time | Requisition Total |
|------------------|-----------------|-----------------------|-------------------|
| requisitor 01 | Gator Requestor | 2/17/2014 12:51 PM | 0.00 USD |
| requisitor 04 | Gator Requestor | 2/14/2014 1:23 PM | 5.00 USD |
| requisitor 03 | Gator Requestor | 2/14/2014 10:40 AM | 0.00 USD |
| requisitor 02 | Gator Requestor | 2/14/2014 10:33 AM | 0.00 USD |
| requisitor 02 | Gator Requestor | 1/8/2014 4:39 PM | 9.99 USD |
| requisitor 01 | Gator Requestor | 1/8/2014 4:36 PM | 0.00 USD |

To create a "master" cart:

1. You may consolidate carts into a draft cart or you may create a new one for consolidating.
 - Note: The system won't allow adding lines from one **assigned** cart to another **assigned** cart. This is why you would need to create a new cart for consolidating.
2. To consolidate carts, create a "master" cart and give it an easy-to-find name, for example, "Consolidated Cart to Mister Paper".
 - a. To do so, click the **Create Cart** button.
 - b. Name it and click the **Update** button.

Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts

Create Cart

Assign Substitute
Substituting For: Marianne Preisler

| Active Cart | Cart Number | Shopping Cart Name | Date Created | Cart D |
|-------------|-------------|-----------------------------|--------------|--------|
| | 793312 | 2012-06-11 ufrequestor 13 | 6/11/2012 | |
| | 793315 | 2012-06-11 ufrequestor 16 | 6/11/2012 | |
| | 793249 | FPU ODP FORM TEST 12/5/2013 | 6/11/2012 | |

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 1096088 - Draft Requisition

Shopping Cart for Gator Requestor

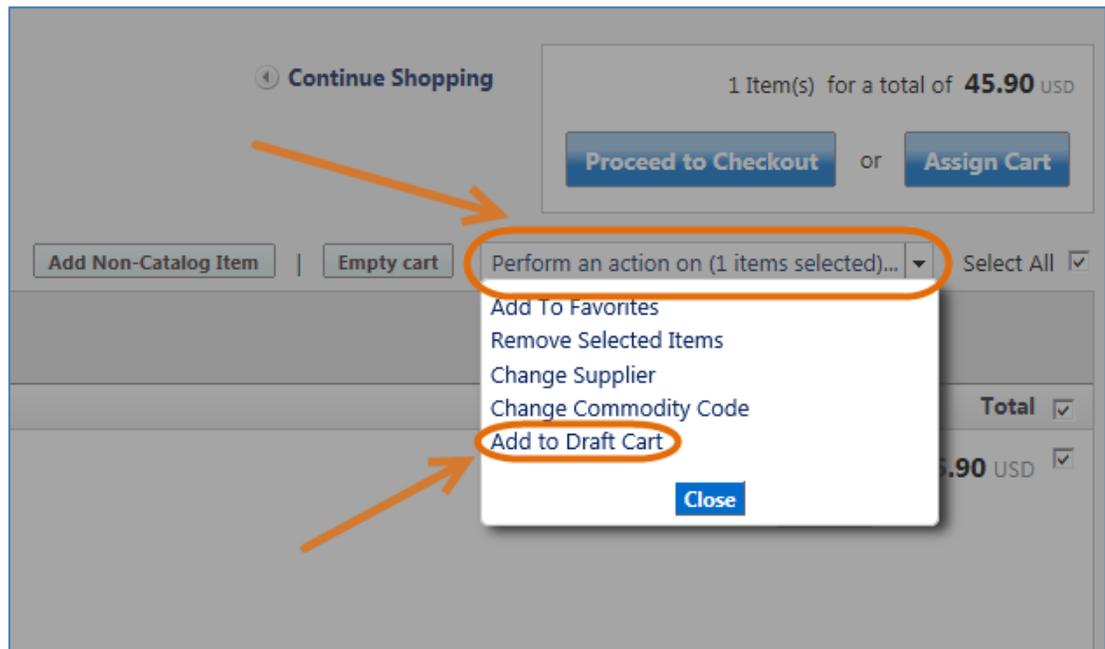
Name this cart:

Have you made changes? **Update** | | **Help** | **Add Non-Catalog Item** | **Empty cart**

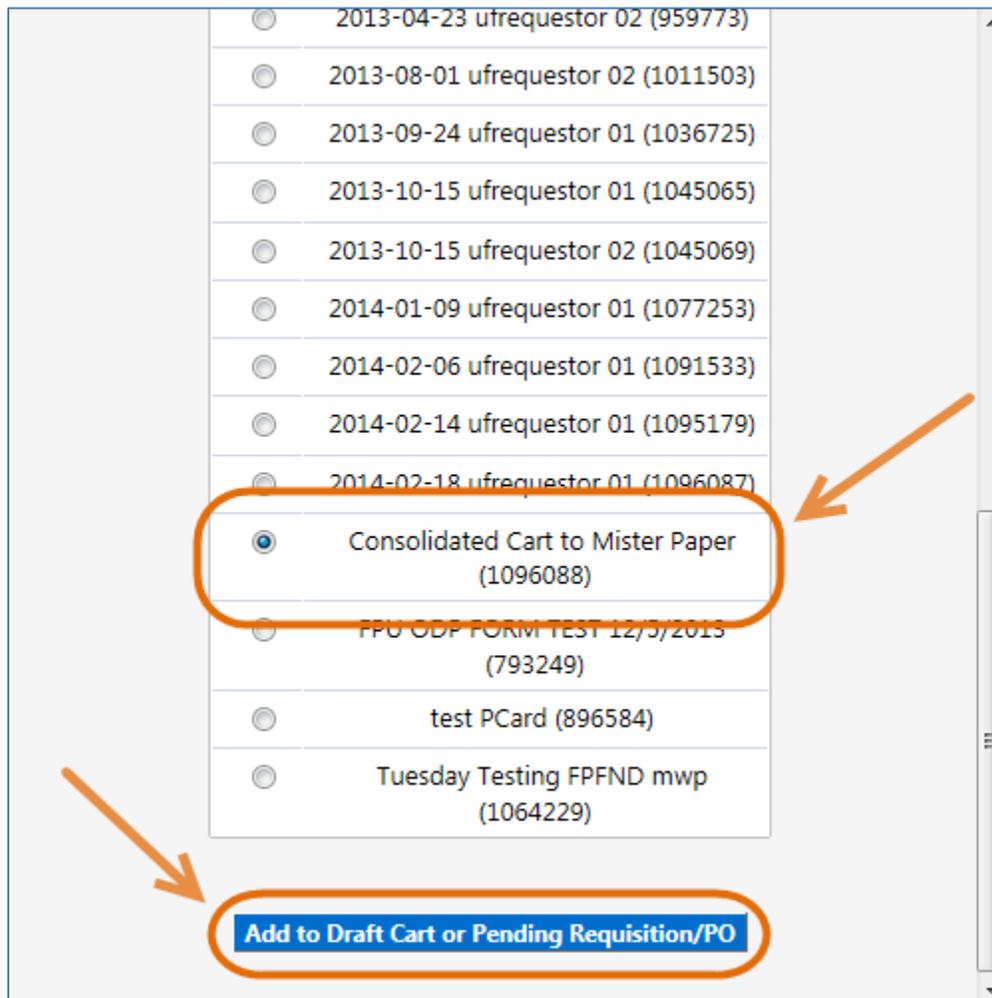
To consolidate carts:

- Note: You may want to let your shoppers know that for certain vendors, assigned carts may be consolidated and this may delay their order. Also, if they signed up for e-mail notifications, the cart number may change when consolidated. They will receive an e-mail from the system when their original order is processed even after consolidation.

1. Find your draft carts or assigned carts, by clicking the **Open My Active Shopping Cart** breadcrumb link at the top of your cart > **View Draft Shopping Carts**.
2. Open each cart to be consolidated by clicking the Shopping Cart Name.
 - a. Check the box of the line item you would like to copy into the master cart, or check the Total box to copy all the lines beneath it.
 - b. myUF Marketplace automatically groups line items in a cart by vendor. Make sure the vendor is the same one as in the "master" cart.
 - Note: Add to Draft Cart or Pending PR will not copy requisition information such as Billing, Shipping, ChartFields and PCard.
3. Click the line at the top **"Perform an Action for Selected Lines"** and then click on **Add to Draft Cart**.



- a. The system will display a list of available draft carts or pending purchasing requisitions--find your "master" cart by the name you gave it.
- b. Click the option button next to the "master" cart you have prepared.
- c. Click the **Add to Draft Cart or Pending Requisition/PO** button at the bottom.
- d. The system will copy the selected lines into the "master" cart.



4. Repeat these steps for each cart that you would like to consolidate.
 - a. The original carts will remain as **My Drafts** which you may delete.
 - b. The History tab for the new requisition will show the requisition numbers of the original requisitions and state "New line added – draft" for each line added.

To view and process the consolidated "master" cart:

1. To review the consolidated cart, navigate to the **View Draft Shopping Carts** page.
2. Find the consolidated "master" cart by name and click the **Shopping Cart Name** link.
3. Click **Proceed to Checkout** at the top.
4. Complete any ChartField, Shipping or Billing information if information needed is different. See the "Completing a Requisition in myUF Marketplace" instruction guide.

To view a record of the carts that were consolidated:

1. Click the **History** tab from the consolidated requisition.

- a. The **From** column will show all the cart numbers (Requisition) that were consolidated.
- b. The **Action** column will say "Requisition modified".

The screenshot shows the 'History' tab for Requisition 1096088. The table below is a representation of the data shown in the interface.

| Line No | Date/Time | User | Step(s) | Action | Field Name | From | To | Note |
|---------|----------------------|-----------------|---------|----------------------|------------|---------------------------|-----------------------------------|------|
| | 2/18/2014 2:04 PM | Gator Requestor | | Requisition modified | Cart Name | 2014-02-18 ufrequestor 02 | Consolidated Cart to Mister Paper | |

For additional help e-mail procurement@ufl.edu or call the Procurement Services Help Desk at 392-1335.