

# [Consolidating Carts in myUF Market]

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 sustainable because it reduces deliveries. This instruction guide is for Requestors (those with the UF\_N\_MKT\_REQUESTOR role.) There are two ways to consolidate carts. You may **add lines only** to another cart, or **move lines and their requisition information** to another cart. Please keep in mind that requisitions with more than one billing, shipping, PCard and vendor may generate more than one purchase order.

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- ▶ Access myUF Market by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password
  - ▶ Click **eProcurement > myUF Market**

## To view your current carts:

- ▶ To view all your carts, including assigned carts
  - ▶ Navigate to **Carts > Draft Carts** to view all your carts
  - ▶ You may consolidate carts into a draft cart or you may create a new one for consolidating

## To create a "master" cart:

Note: The system won't allow adding lines from one **assigned** cart to another **assigned** cart.

- ▶ To consolidate carts, create a "master" cart and give it an easy-to-find name, for example, "Consolidated Cart to Mister Paper"
  - ▶ To do so, click the **Create Cart** button
  - ▶ Name it and save it

## To consolidate carts:

Note: You may want to let your shoppers know that for certain vendors, assigned carts may be consolidated. This may delay their order, and if they signed up for e-mail notifications, the cart number may change when consolidated, thus not notifying them of the status of their original cart.

- ▶ Find your draft carts or assigned carts, and for each one:
  - ▶ Check the box of the line item you would like to copy into the master cart, or
  - ▶ Check the Vendor box to copy all the lines beneath it
    - myUF Market automatically groups line items in a cart by vendor
    - Make sure the vendor is the same one as in the "master" cart
- ▶ Decide which of the two methods below you would like to use – this determines what you choose in the Action Dropdown box
  - ▶ **Add to Draft Cart or Pending PR**
  - ▶ **Move to Another Cart**

**Method 1: Add to Draft Cart or Pending PR – will not copy requisition information such as Billing, Shipping, ChartFields and PCard:**

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- ▶ Click the dropdown and click on **Add to Draft Cart or Pending PR** and click the **GO** button
  - ▶ The system will display a list of available draft carts or pending purchasing requisitions – find your “master” cart by the name you gave it
  - ▶ Click the option button next to the “master” cart you have prepared
  - ▶ Click the **Add to Draft Cart or Pending PR button** at the bottom
  - ▶ The system will copy the selected lines into the “master” cart
- ▶ Repeat these steps for each cart that you would like to consolidate
- ▶ The original carts will remain as **Drafts Assigned to Me** which you may delete
- ▶ 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

History			
?			
Records found: 9			
Step(s)	Action ^	Field Name ^	From
Budget Validation	Message transmission to external system was successful.		
Combo Edit Validation	Requisition approved		
Combo Edit Validation	Message transmission to external system was successful.		
	Requisition submitted		
	New Line added - draft	978360	Requisition 268020
	New Line added - draft	250837	Requisition 291107

**Method 2: Move to Another Cart– will copy requisition information such as Billing, Shipping, ChartFields and PCard. This will generate more than one Purchase Order:**

Note: Because the system is moving PR information with the line, you will need to edit the consolidated cart line by line, including Shipping, Billing, etc. Before you move new lines into the cart, complete as much of this information in the “master” cart first so you won’t have to do it line by line later. You won’t be able to edit ChartFields at the header level after you move new lines on, so complete before you move!

- ▶ Click the dropdown and click on **Move to Another Cart** and click the **GO** button
  - ▶ The system will display a list of available draft carts and the option to “Move to New Cart” – find your “master” cart by the name you gave it
  - ▶ Click the “master” cart you have prepared to select
  - ▶ Click the **Move button**

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- ▶ The system will move the selected lines and PR information into the “master” cart and delete these lines and PR information from the original cart
- ▶ Repeat these steps for each cart that you would like to consolidate
- ▶ The original carts will remain as **Drafts Assigned to Me with their PR information but without the line items**

## To view and process the consolidated “master” cart:

- ▶ To review the consolidated cart, click the **Draft Carts** page
  - ▶ Find the consolidated “master” cart by name and click the **cart number link**
  - ▶ Click **Review** at the top right in the clickable cart path diagram
  - ▶ Complete any ChartField, Shipping or Billing information at the **header level** for all the lines, or edit these at the **line level** if information needed is different
    - To view line by line or edit at the line level, click one of the tabs at the top-left near Summary, such as **Shipping**, **Billing** or **Chart of Account Fields**

The screenshot shows the 'myuf market' interface for a 'Draft Requisition'. At the top, there's a navigation bar with 'home', 'my favorites', 'product search', 'carts', 'approvals', 'history', and 'profile'. Below this is a breadcrumb trail: 'active cart > draft carts > my favorites > my requisitions'. A workflow diagram shows: 'Add Products' -> 'Edit Cart' -> 'Review' -> 'Place Order or Assign Cart', with a side path 'PR Approvals' -> 'PO Preview'. The main content area has tabs for 'Requisition', 'PR Approvals', 'P.O. Preview', and 'History'. The 'Summary' tab is selected and circled in red. Below the tabs are sections for 'General', 'Shipping', and 'Billing', each with an 'edit' link. The 'General' section shows 'Cart Name: main cart', 'Description: Mister Paper', 'Priority: Normal', and 'Prepared by: Marianne Preisler'. The 'Shipping' section shows 'Ship To: Ship To values vary by line' and 'Delivery Options'. The 'Billing' section shows 'Bill To: Attn: Marianne Preisler, PO Box 113111, GAINESVILLE, FL 32611, United States'.

- Click the **Edit** link at the right of each section to edit per line

## To view a record of the carts that were consolidated:

- ▶ Click the **History** tab from the consolidated requisition
  - ▶ The **From** column will show all the cart numbers (Requisition) that were consolidated
  - ▶ The **Action** column will say “Requisition Line Item moved – draft”

The screenshot shows the 'History' tab selected. Below it is a search bar with a question mark icon. A message says 'Records found: 1'. Below that is a table with the following data:

Step(s)	Action ^	Field Name ^	From
	Requisition Line item moved - draft	733601	Requisition 291108

For additional help e-mail [myufmarket@ufl.edu](mailto:myufmarket@ufl.edu) or call Purchasing Services at 392-1331 or visit [http://www.purchasing.ufl.edu/myuf market](http://www.purchasing.ufl.edu/myuf%20market)