

## eShop How-To Sheets

# Assigning a Cart

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### This how-to sheet outlines the steps required to:

- Assign a cart that contains either goods or services directly to a specific person.

### When should a cart be assigned?

- If your department would like your orders reviewed by 1 particular person within the department, they may request you assign the cart directly to that person.
- When you don't have the authority to submit a cart (i.e. you have not been granted access to an index).
- Questions? Email [eshop@carleton.ca](mailto:eshop@carleton.ca).

### Does the cart only go to the person you assigned it to?

- Maybe.
- In short, it depends on the financial access the person you assigned the cart to has related to the index you chose for the cart (if you included an index).
- An index is a short code for the Fund, Organization, and Program elements of the FOAPAL accounting string. In plain English, the index identifies the source of funding for an expenditure.
- In eShop, users may be granted the appropriate financial access to an index.
- If you require access to additional indexes, you can request access through the [Financial Access and Authority Management \(FAAM\) tool](#). Questions? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).
- Questions? Email [eshop@carleton.ca](mailto:eshop@carleton.ca)

### Tips:

- Do not add a form to a cart with goods (e.g. office supplies from staples) or other forms.

### THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

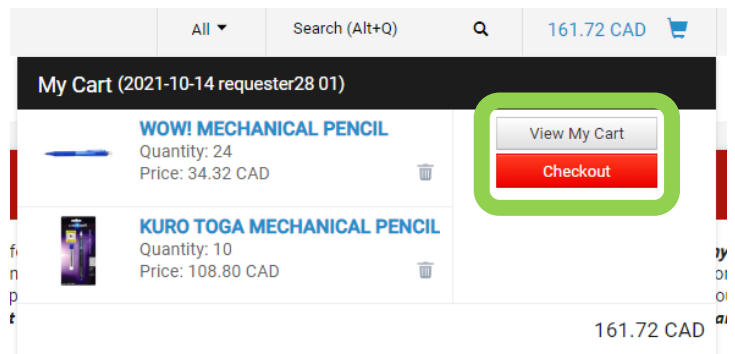
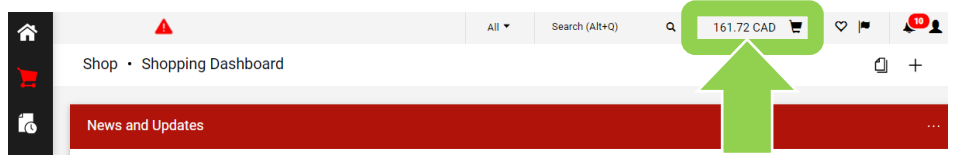
1. You have already logged into eShop and have added items to a cart (e.g. goods, a form).
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2. If you have a cart open and are ready to assign the cart, skip to step 3.

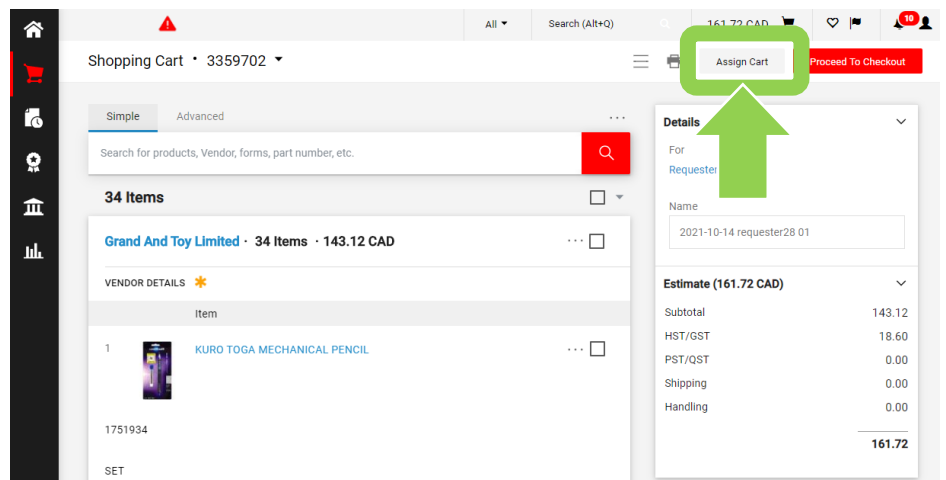
To open the current cart, click on the amount beside the shopping cart icon.

**Tip:** For certain types of forms, the amount beside the cart may be 0.

In the window that opens, click on the grey 'View My Cart' button to review your cart (Step 3) OR click on the red 'Checkout' button to proceed directly to the checkout page (Step 4).



3. If your cart is complete, click on the grey 'Assign Cart' button.



4a. **Searching for the person you want to assign the cart to ...**

In the window that opens, click on the blue 'SEARCH' text to find someone to assign the cart to.

Assign Cart To: no value

Note To Assignee:

SEARCH

Assign Close

4b. **Searching for the person you want to assign the cart to ...**

In the window that opens, enter the person's information in one of the search fields.

Click on the red 'Search' button.

User Search

Last Name skinner

First Name

User Name

Email

Department

Role

Results Per Page 10

Search Close

4c. **Searching for the person you want to assign the cart to ...**

If the correct person appears in the 'User Search' window, click on the grey '+' button.

User Search

New Search

Name ↑	User Name	Email	Phone	Action
Skinner, Irene	ireneskinner	Irene.Skinner@Carleton.ca	+1 613-520-2600 ext. 2602	+

4d. **Searching for the person you want to assign the cart to ...**

Click on the red 'Assign' button to assign the cart to the person you've chosen.

**Tip:** You can click on the box beside 'Add to Profile' if you assign carts to this person often.

**Tip:** Enter a comment in the 'Note to Assignee' field to tell the person why you are assigning the cart to them.

**Assign Cart: User Search** [X]

Assign Cart To: Skinner, Irene  
or [SEARCH](#)

Add to Profile

Note To Assignee:

**Assign** Close

5. The cart has been assigned.

**Cart Assigned**

Requisition Summary	Options
Requisition number 153087047	<a href="#">Create new draft cart</a>
Cart name 2022-01-17 Office Supplies	<a href="#">Recent orders</a>
Requisition total CAD	<a href="#">Return to your home page</a>
Number of line items 1	

**What next?**

- Visit [carleton.ca/facts/eshop](http://carleton.ca/facts/eshop) to find more how-to sheets.
- Questions about the system? Email [eshop@carleton.ca](mailto:eshop@carleton.ca) or call 613-520-2600 ext.3311.