

Manage Groups and Shared Carts in iBuyNU

Body

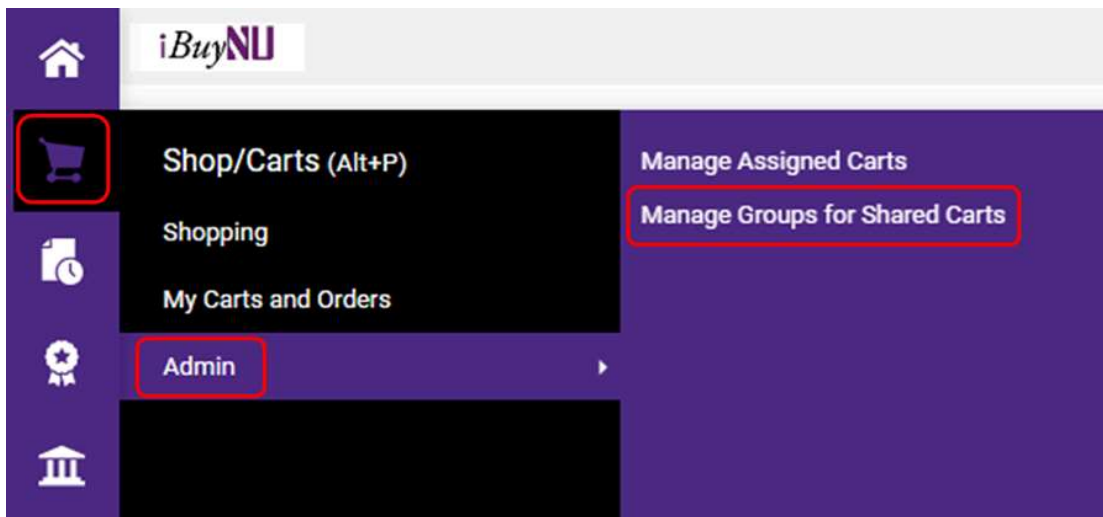
This guide discusses how to manage Groups and Shared Carts created in iBuyNU.

You can create a shopping cart in iBuyNU that others can add to, edit and checkout.

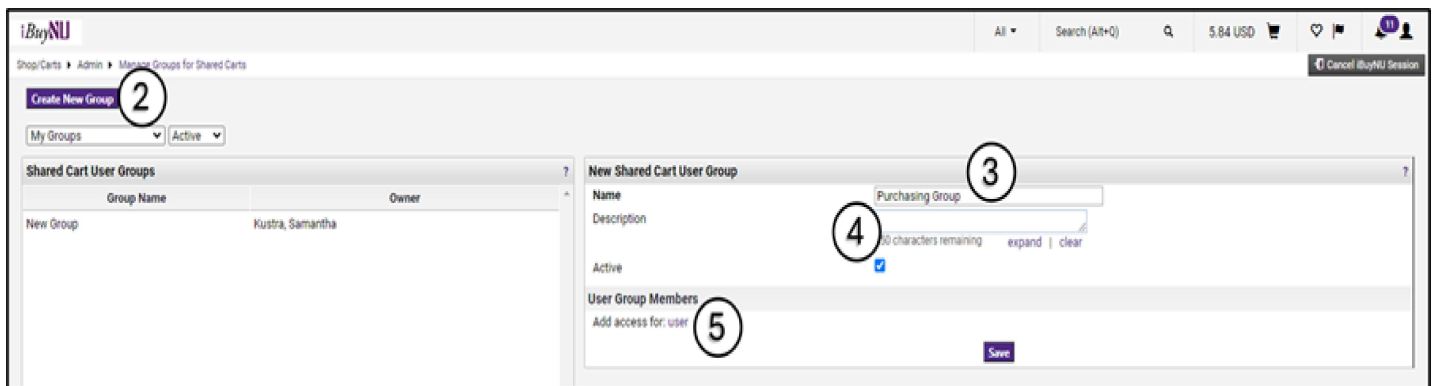
Create/Manage Groups in iBuyNU

To share a cart with a group, you must first create that group in iBuyNU:

1. On the left-hand navigation, click Shop/Carts > Admin > Manage Groups for Shared Carts





2. Click **Create New Group**
3. Add **Name** of New Shared Cart User Group
4. *Optional:* Add Description
5. Click **user** to add new User Group Members





6. Enter for user's **Last Name, First Name** and/or **Email**.
7. Click Search


User Search

Last Name 

First Name 

User Name 

Email 

Role 

Results Per Page


Search

- 8. Matching search results will be displayed. Under action, click select for the user(s) that you would like to add.
- 9. The **Selected User(s)** will be shown above. When all of the desired users from your search have been added, click **Add Selected Users**.

Selected Users

Add Selected Users

[Search For Another User](#)

Name ▲	User Name ▲	Email ▲	Phone	Action
Paddy, Dylan	dpaddy	k-paddy@northwestern.edu	+1 847-942-2874	 [select]
Paddy, Keith	fishertest	k-paddy@northwestern.edu	+1 847-467-6963	[select]
Paddy, Keith	KRP929	peoplesoft@peoplesoft.com	+1 847-467-6963	[select]
Paddy, Keith	k-paddy	k-paddy@northwestern.edu		[select]

- 10. Users will be added to the new group. Once all desired users have been added, click **Save**.

New Shared Cart User Group

Name

Description

Active

User Group Members

Add access for: user

Users	Action
Paddy, Dylan (dpaddy)	Remove

Save

- 11. The new group will be created and displayed under **Shared Cart User Groups**.
 - As the owner, you will automatically be added as a member of the group.
- 12. *Optional:* To make any changes to an existing Shared Cart User Group, select the group and make the desired changes (Group Name, Description, Add/Remove Users, Mark as Active/Inactive)

Create a Group Cart

To create a group cart:

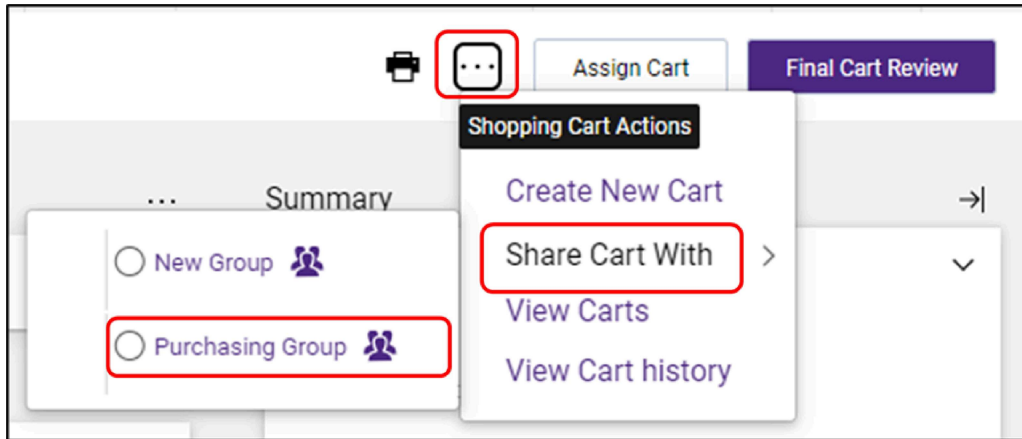
1. Shop and add items to your shopping cart. For information on shopping and creating a cart, see Create and Assign a Shopping Cart Training Document KB article.
2. Click the cart icon



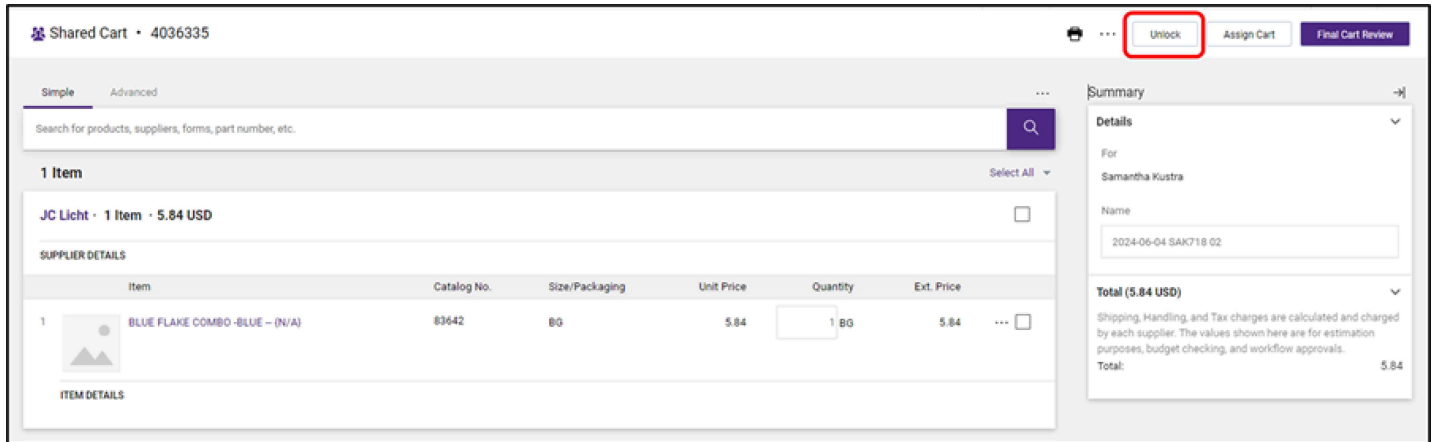
on the header bar.

3. Click **View My Cart**.
4. iBuyNU displays your current shopping cart. Click the 3 dots (Shopping Cart Actions) > Hover over Share Cart With > Select the Group you would like share you cart with

iBuyNU adds the cart to your Group Cart and adds it to the Group Cart of the members you included. iBuyNU also sends an email to the group members notifying them that they've been invited to a group cart.



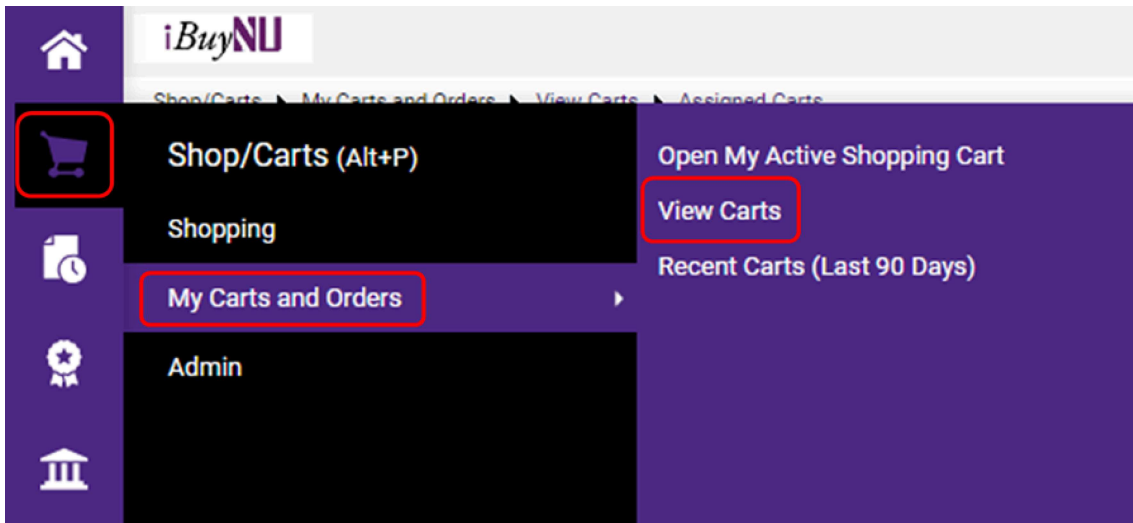
5. **Unlock** cart to allow other users in the group to make changes to the cart.



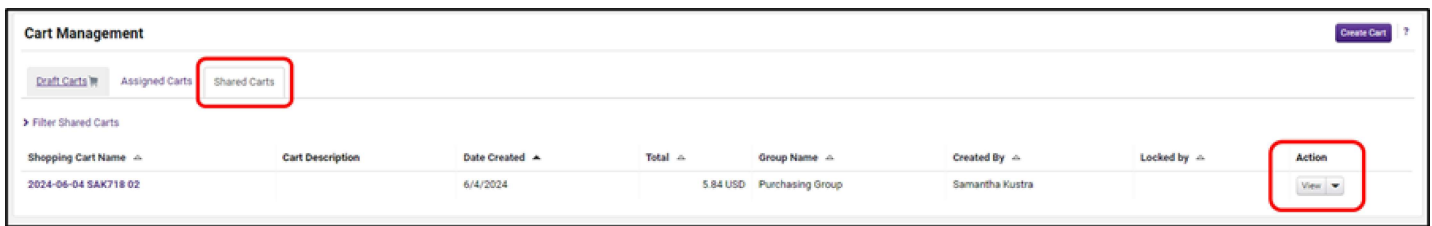
6. **Lock** cart to prevent other users in the group from making changes to the cart
 - Cart must be locked to Assign or Checkout

View and Edit a Group Cart

1. On the left-hand navigation, click Shop/Carts > Admin > Manage Groups for Shared Carts



2. Click the **Shared Carts** tab and under **Action**, select **View**.



From the **Shared Cart** page you can edit the cart, assign it for purchasing (Shopper or Requester) or check the cart out (Requester), or empty the cart.

Add Items

1. On the left-hand navigation, click the



icon to view/shop supplier catalogs.

Edit or Empty a Group Cart

1. Click the



to lock the cart.

2. Edit the Cart Name via the **Summary** box.

Summary →

Details ▾

For
Samantha Kustra

Name

New Test Cart Name

Total (80.70 USD) ▾

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 80.70

3. To remove items from the cart, select the item check box and select **Remove Selected Items**.

iBuyNU

Shared Cart • 4036335

33.78 USD

Unlock Assign Cart Final Cart Review

Simple Advanced

Search for products, suppliers, forms, part number, etc.

2 Items Select All

JC Licht • 2 Items • 33.78 USD

SUPPLIER DETAILS		Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1		BLUE FLAKE COMBO -BLUE - (N/A)	83642	BG	5.84	1 BG	5.84	<input checked="" type="checkbox"/>
ITEM DETAILS								
2		FS F DRY EXT PRIMER- DEEP BASE - GAL	57753	GAL	27.94	1 GAL	27.94	<input type="checkbox"/>
ITEM DETAILS								

Summary

Details ▾

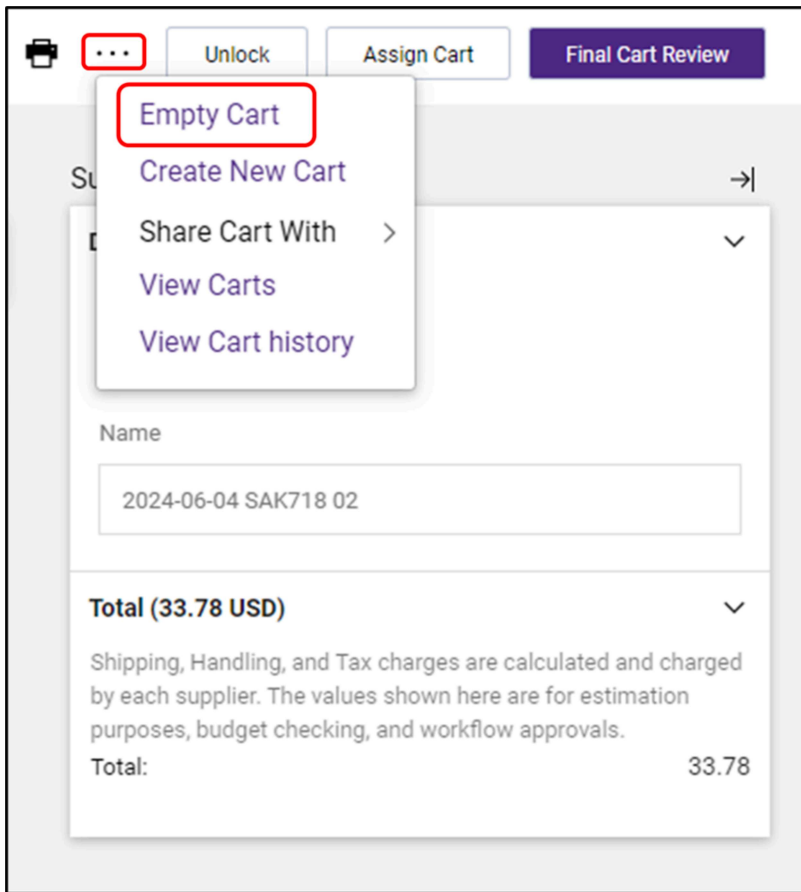
For
Samantha Kustra

Move to Another Cart >
Add to Draft Cart >
Add to Favorites >
Remove Selected Items

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 33.78

4. To empty the cart, click the 3 dots (**Shopping Cart Actions**) > Empty Cart



4. Optional:



the cart when changes are complete to allow other users in the group to make changes.

Assign the Cart for Purchasing or Check Out

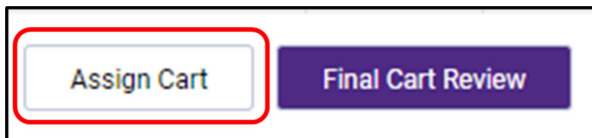
1. If the cart is unlocked, lock it by clicking the



button.

- Cart must be locked to Assign or Checkout

2. Click Assign Cart:



3. Assign Cart: User Search dialogue box will appear. Click **Search** to search for a user.

Assign Cart: User Search ✕

Assign Cart To: *no value*
or **SEARCH**

Note To Assignee:

Assign **Close**

- User Search dialogue box will appear: Enter **Last Name**, **First Name** and/or **Email** of desired user.
- Click **Search**.

User Search ✕

Last Name ⓘ

First Name ⓘ

User Name ⓘ

Email ⓘ

Role ⓘ

Results Per Page

5 **Search** **Close**

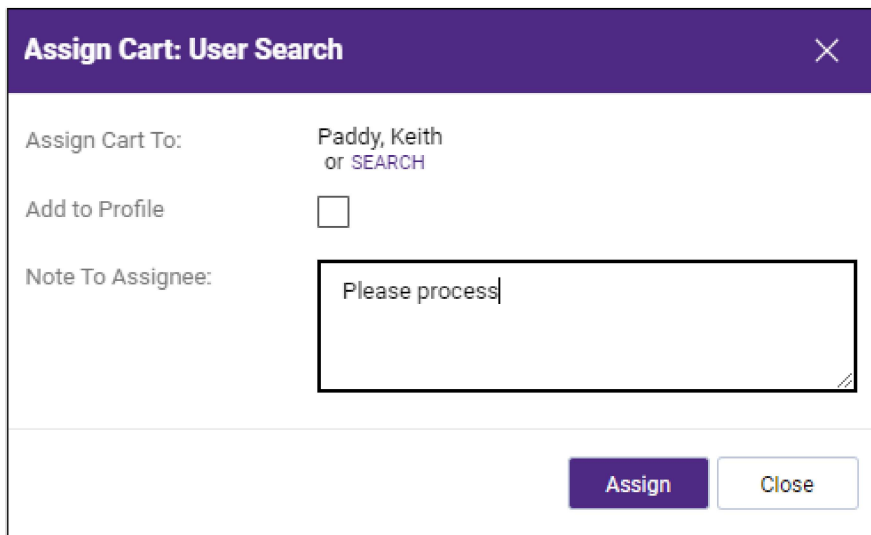
- Users matching search will be displayed. Under **Action**, select the **plus sign** for the user you would like to assign the cart to.

User Search ✕

Name ↑	User Name	Email	Phone	Action
Paddy, Keith	KRP929	peoplesoft@peoplesoft.com	+1 847-467-6963	+
Paddy, Keith	k-paddy	k-paddy@northwestern.edu		+

Close

- Optional:* **Add Note to Assignee**.
- Click **Assign** button.



Assign Cart: User Search

Assign Cart To: Paddy, Keith
or SEARCH

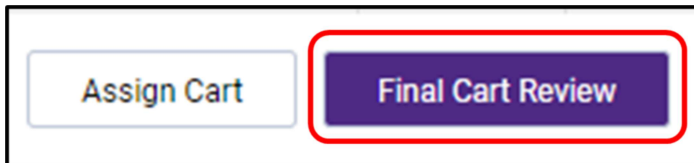
Add to Profile

Note To Assignee:

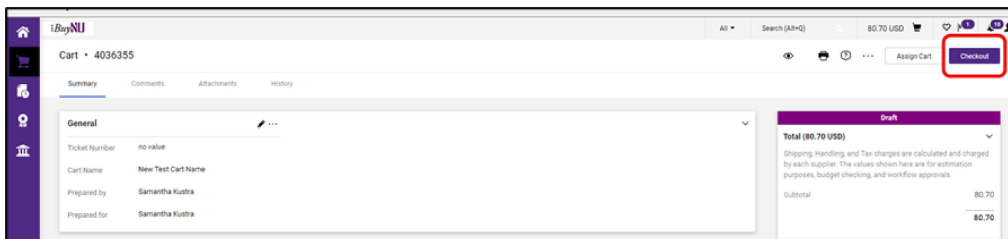
Assign **Close**

iBuyNU sends an email notification to the Requester and changes the **Type** in the **Group Cart** display to **Pending**.

9. To checkout (Requester only): click **Final Cart Review** button.



10. Click **Checkout**.



iBuyNU sends an email notification to the Requester and changes the cart type in to **Assigned Carts**.

Additional Resources

- Procurement and Payment Services
- Phone: 847-491-8120
- procurement@northwestern.edu

For additional assistance please contact the IT Support Center at 847-491-4357 (1-HELP) or email servicedesk@northwestern.edu.

Details

Details

Article ID: 1181

Created

Thu 5/12/22 1:38 PM

Modified

Mon 6/24/24 11:08 AM

Related Articles

Related Articles (1)

Create a Shopping Cart in iBuyNU