*The University of Tennessee*

easyPurchase™ Transfer Originator’s Cart



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# Getting Started

Purpose

The purpose of the **Transfer Originator’s Cart** functionality is to allow an entity the flexibility of utilizing additional resources in the shopping experience while maintaining complete control over the approval process. These users (such as summer interns or graduate assistants) can be configured to only access the Shop and Cart tabs and will be configured to transfer all transactions to another user for purposes of completing the transaction (account codes, workflows, etc.) and approving the purchase. These users may log in to **easyPurchase** and shop as directed, however the items in their cart will be transferred to a designated **Approver** in the department for **Approval** and **Checkout.**

## Activating Transfer Originator’s Cart at the Entity Level

1. **ESM Solutions Support** can activate **Transfer Originator’s Cart** for an entity under **ESM Admin> Entity Functionality** and checking **Order Summary** box and clicking **Update**.



## Activating Transfer Originator’s Cart at the User Level

1. **ESM Solutions Support** or a **User with Admin privileges** can activate **Transfer Originator’s Cart** for a user.
	* Under **ESM Admin > Administer Entities/Suppliers**, enter the entity name and click **Go**.
2. **Select Function > General Settings > Add/Edit Users** and search for a user to get to the screen below.



1. Under **Privileges,** check the box for **Transfer Originator’s Cart.**
2. Under **Edit Cart Transferred To,** check thebox if the user will need to edit the name associated with **Cart Transferred To** during vacation, illness, etc.
3. Under **Cart Transferred To,** select the name of the person to whom the cart will be transferred for Approval.
4. Select the **Default Ship To/Default Bill To** and click **Update**

# Using Transfer Originator’s Cart

## Login as a Transfer Originator’s Cart User

1. The **Transfer Originator’s Cart** user will only see **Shop** and **Cart** while in **easyPurchase**.



## Shopping in easyPurchase and Transferring the Cart

1. The user will shop in **easyPurchase** by**,** as any other user would, clicking on the catalogs available and selecting the items needed. The **Cart** tab will show the total number of items that will be transferred to another user for Approval.



1. From the **Cart** tab, the user may edit quantities, edit **Transfer Cart to** or click on the **Continue** button to convert the Cart into transaction(s).



1. To edit the **Transfer Cart to**, **Select > Edit**
2. A **User Search** box will appear.



1. Type in user id or a letter to search for the person you wish to transfer the cart to



1. Select the user by clicking on the email address.
2. The cart will now be forward to the new approver.



1. After converting to transaction(s), the **Transfer Originator’s Cart** now shows Zero items



## Approval of the Transferred Items

1. If **Email Alerts** are enabled, the **Approver** will receive an **Email Alert** from the **Originator**.
2. Login as the **Approver**.
	* *Note: The items from the* ***Originator’s*** *cart do not show in the* ***Approver’s*** *cart.*



1. The **Approver** can continue and approve the order.
* *Note: The next steps shown may vary based upon the workflow criteria that are set up for the entity.*



