

Cart and Order History

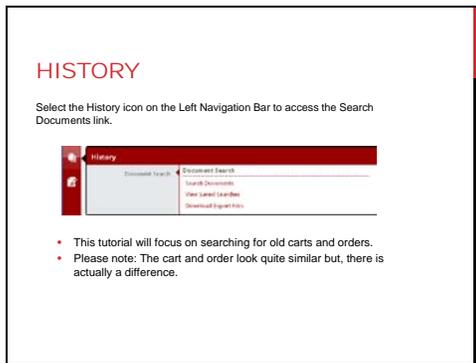
Slide 1



This tutorial will review how shoppers can find and view the history of orders and carts within Shop@UW. The following topics will be covered:

- Understanding the difference between carts and orders
- Searching for old carts and orders and managing the search results
- And using the “My Recent Orders” shortcut to quickly identify the past 90 days of orders.

Slide 2

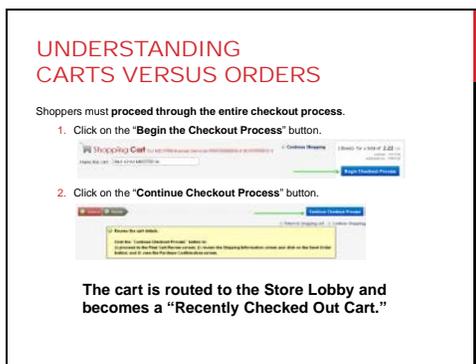


Shoppers will find the link to search their shopping history on the History icon fly out menu. The first option, Search Documents, allows the user to review cart and order information.

Clicking the Search Documents link opens the search window.

Please note: The cart and order information looks quite similar but, there is actually a difference that is important to understand before using the search. The next piece of the tutorial presents an overview of the cart checkout process to illustrate how the cart becomes an order.

Slide 3



A cart is what the shopper sees during the shopping experience in the Shop@UW storefront. Shoppers must proceed through the entire checkout process in the storefront and click the following buttons:

- “Begin Checkout Process” and
- “Continue Checkout Process”.

Once the “Continue Checkout Process” button is clicked in the storefront, the cart is routed to the Store Lobby.

At this point, the cart becomes a “My Recently Checked-Out Cart.”

Cart and Order History

Slide 4

UNDERSTANDING CARTS VERSUS ORDERS: STORE LOBBY

While in the store lobby, shoppers must click through two additional screens: 1) Final Cart Review and 2) Shipping Information.

- Click the "Continue to Shipping Info" button; still a cart.
- The shopper goes to the "Shipping Information" screen.

While in the store lobby, shoppers must click through two additional screens:

- Final Cart Review and
- Shipping Information.
- Click the "Continue to Shipping Info" button on the Final Cart Review.
 - **Remember, at this point, it is still a cart!**
- The shopper goes to the "Shipping Information" screen.

Slide 5

CART BECOMES AN ORDER: STORE LOBBY

- Shoppers must click on the "Send Order" button and the Cart becomes an order.
- Return to the Shop@UW storefront. Find the History icon; click on "Search Documents."
- Or, use the Shop@UW "My Recently Completed Orders" link.

The shopper must Click on the "Send Order" button.

The Final Cart Review in the Store Lobby turns into an order once the "Send Order" button on the Shipping Information screen is clicked.

The shopper is taken to the "Purchase Confirmation" screen.

- Orders are given a unique number containing the MD number attached to a string beginning with PVX.
- The shopper will notice that items from multiple vendors are added to a cart but then the items for each vendor are turned into a unique order.
- For example, if items from both Staples and SHI are in the cart, this cart becomes two separate orders, each with its own PVX number when purchased.

Return to the Shop@UW storefront and find the History icon; click on "Search Documents."

- The order will also appear in the "My Recently Completed Orders" section.

Cart and Order History

Slide 6

SEARCHING FOR OLD CARTS AND ORDERS

When the user clicks on the "Search Documents" link at the History icon on the left navigation bar, a window opens with search options.



- Dropdown menu for All Documents, Carts, and Orders
- Keyword search field
- Date range options



When the user clicks on the "Search Documents" link at the History icon on the left navigation bar, a window opens with search options.

The simple search allows the user to define three criteria for the search:

- A dropdown menu for All Documents (which includes both carts and orders), Carts, or Orders;
- A keyword search field; and
- A date range option dropdown.

Enter exact or partial values for keywords in the search terms box.

Note: There is no need to type a wild card character for partial number searches. Only type the digits that are known.

Slide 7

ADVANCED SEARCH OPTIONS FOR OLD CARTS AND ORDERS

The advanced search allows the user to pre-filter searches by more specific criteria. Additional criteria is available when the cart or order options are selected.



The advanced search allows the user to pre-filter searches by more specific criteria.

- Additional criteria are available when the cart or order options are selected.

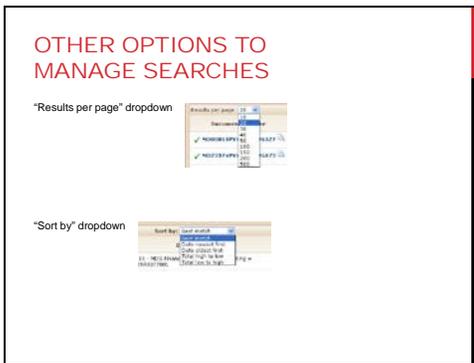
Cart and Order History

Slide 8



Order and cart history searches can be refined using the “Refine Search Results” panel. This provides another option to select a date range or to specify a supplier, etc.

Slide 9

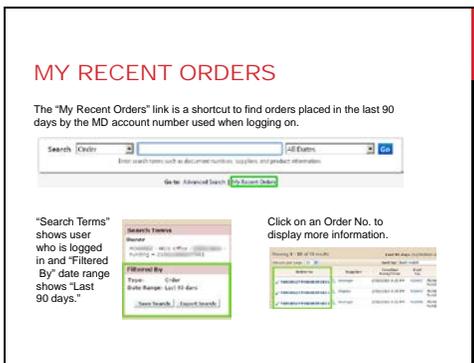


The “Results per page” dropdown option can be used to increase the number of items viewable on each screen.

Other options available in the “Sort by” dropdown are:

- Best match (the default)
- Date newest first
- Date oldest first
- Total high to low
- Total low to high

Slide 10



A shortcut to finding recent orders is available for the MD number that the shopper used to login.

Click the “Search Documents” link on the History icon fly out menu. Find the “My Recent Orders” link next to the “Go to” heading by the History search box and click on it.

- This link is a shortcut to quickly find orders placed in the last 90 days by the MD account number used when logging on.

Notice that the “Search Terms” Owner is the person who logged in and the “Filtered By” shows the date range as the “Last 90 days:” criteria that are different than when the global search is used.

Click on an Order No. in the list of orders in the search results window to display more information.

Cart and Order History

Slide 11

NEXT STEPS

Review tutorials for important Shop@UW functions on the tutorial index web page found at <http://www.bussvc.wisc.edu/shopuw/tutorials.html>.



Questions about Shop@UW can be forwarded to the customer service desk at shopuw@bussvc.wisc.edu.

© 2013 University of Wisconsin-Madison
Division of Business Services, Purchasing Services

This completes the tutorial for searching for cart and order history.

A number of other tutorials for important Shop@UW functions are available to review on the tutorial index web page found at <http://www.bussvc.wisc.edu/shopuw/tutorials.html> .

Questions about Shop@UW can be forwarded to customer service at shopuw@bussvc.wisc.edu .