

Cart Takeover

The cart takeover feature enables customer service representatives (CSRs) to take over an online cart and make changes with an offline order so that the cart has the shopper's desired products and product configurations.

This feature is supported for both single- and multi-ship tenants.

Use Cases

Edit the Contents of a Shopper's Cart

There is a shopper who needs help selecting several custom products that offer different complex configurations. Using cart takeover, a CSR can take control of the shopper's cart, browse for products, and add/remove products from the shopper's cart.

Technical Notes

The CSR must be assigned to a role that has the Customer Update behavior.

CSRs can take over carts for both anonymous and registered shoppers. However, keep in mind that viewing an anonymous user's cart pulls up an empty cart. For a logged-in user, viewing the cart pulls up the shopper's online cart.

CSRs should also know that the cart will always display the CSR as logged in as a shopper (for instance, see "Welcome, Wade" when viewing the cart in the below interface examples), even though that is not the case. The CSR should not be confused or try to click Log Out.

Process

The recommended workflow for the cart takeover feature is for the CSR to create a new offline order, then use View User's Cart to see the shopper's cart. The CSR should always click **Add Items to Order** to copy the cart items to the offline order, rather than Checkout.

1. Shopper goes to their cart.
2. Shopper calls CSR for help.
3. CSR navigates to **Main > Orders**.
4. CSR creates a new offline order for the customer.
5. CSR selects **View User's Cart**. The offline order is associated with the cart.
6. CSR adds items as necessary.
7. Shopper clicks **Checkout** and sees the order created by the CSR.

There may be an additional step if the customer is placing a BOPIS order and wishes to designate a second pickup contact. In this case, they will be able to specify "Primary Contact" and "Alternate Contact" details (first/last name, email, and optionally phone number) on the Checkout page. If they

begin entering alternate contact details, they must click **Save** before they will be able to submit the order.

How to Use Cart Takeover

In order to view a shopper's cart, a new order must be made by the CSR.

Create the New Order

To create the new order:

1. Click **Create New Order** in the order management view. This opens the below view.
2. Select the customer from the Search and drop-down menu on the right.

Add Items to the Cart

Now that the order is created:

1. Click **View User's Cart** at the top of the order header. There are currently no items in the new order.
2. To add an item, search for the item by keyword or type in the search boxes at the right.
3. Clicking on an item will open the item details view. Click **Add to Cart** here.
4. When all items have been added, click **Add Items to Cart** to exit the takeover and allow the shopper to checkout on their own.
5. The newly created order will now be displayed in the [Order Details pane](#).