

# Cart Takeover

The cart takeover feature enables customer service representatives (CSRs) to take over an online cart and make changes so that the cart has the shopper's desired products and options. For instance, a shopper may need help ordering several custom products with complex configurations. A CSR can take control of the shopper's cart, browse for products, select options, and add/remove them from the cart.

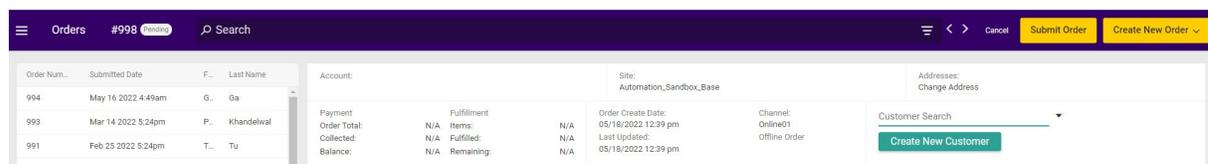
This feature is supported for both single- and multi-ship tenants, but a CSR must be assigned to a role that has the Customer Update behavior.

## How to Use Cart Takeover

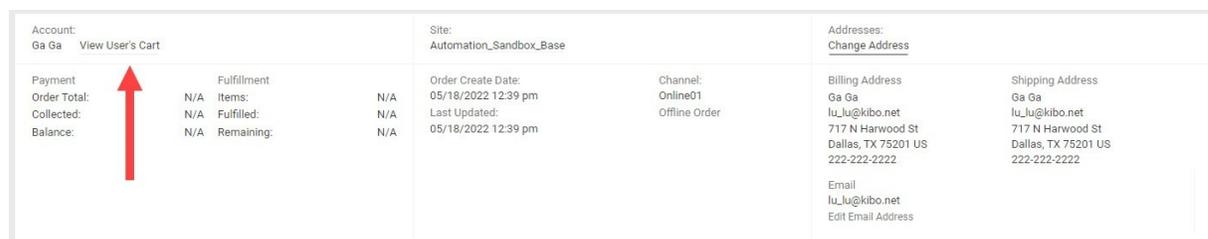
In order to view a shopper's cart, a new order must be made first. CSRs can do this for both anonymous and registered shoppers. However, keep in mind that viewing an anonymous user's cart pulls up an empty cart. For a logged-in user, viewing the cart pulls up the shopper's online cart.

The following example uses an eCommerce storefront. See the [Cart Takeover for Kibo Headless Storefronts section](#) for details on how the process differs for headless implementations.

1. Go to **Main > Orders > Orders**.
2. Click **Create New Order** in the top right. This opens the below page.



3. Select the customer from the **Customer Search** drop-down menu on the right.
4. Now that the order is created, click **View User's Cart** in the header.



5. This will open the cart page, where no items will be displayed initially. To add an item, first search for a keyword or use the drop-down list of products.



The cart will always display the CSR logged in as the shopper even though that is not the case. The CSR should not be confused or try to click Log Out.

Do not proceed to checkout after adding items to cart. Use *Add Items to Order* to complete the order.

Add Items to Order

The screenshot shows the Adam's Keyboards website with a search results overlay. The main page header includes 'Adam's Keyboards' and navigation links for 'Order Status', 'Welcome, Wade! (Log Out)', and 'View Cart (0)'. The search bar contains the text 'key'. The overlay displays a list of search results:

- Carbon Key Caps for Ergodox**: Named for the element on the periodic table and designed by A. Schmidt (you may know him as spoonyluv47 on ...)
- Gold Zinc Key Caps**: Zinc Gold and Silver Tone Keycaps
- Silver Zinc Key Caps**: Zinc Gold and Silver Tone Keycaps
- Troubled Minds Key Cap Set**: Troubled Minds key cap set
- Blank Black DSA PBT Key Caps for Ergodox**: Ergodox Blank Black DSA PBT Key Caps

The main page content shows a 'Cart' section with a table header: Product, Price, Qty. Below the header, it states 'You have no items in your cart.' and 'Tax & Shipping Calculated at Check'. There is a 'Coupon Code:' field with an 'Apply' button. On the right side of the overlay, there is an 'Item Total' section showing a total of '\$0.00'.

6. Clicking on an item opens its details page. Select any options (if applicable) and click **Add to Cart**.

Do not proceed to checkout after adding items to cart. Use *Add Items to Order* to complete the order.

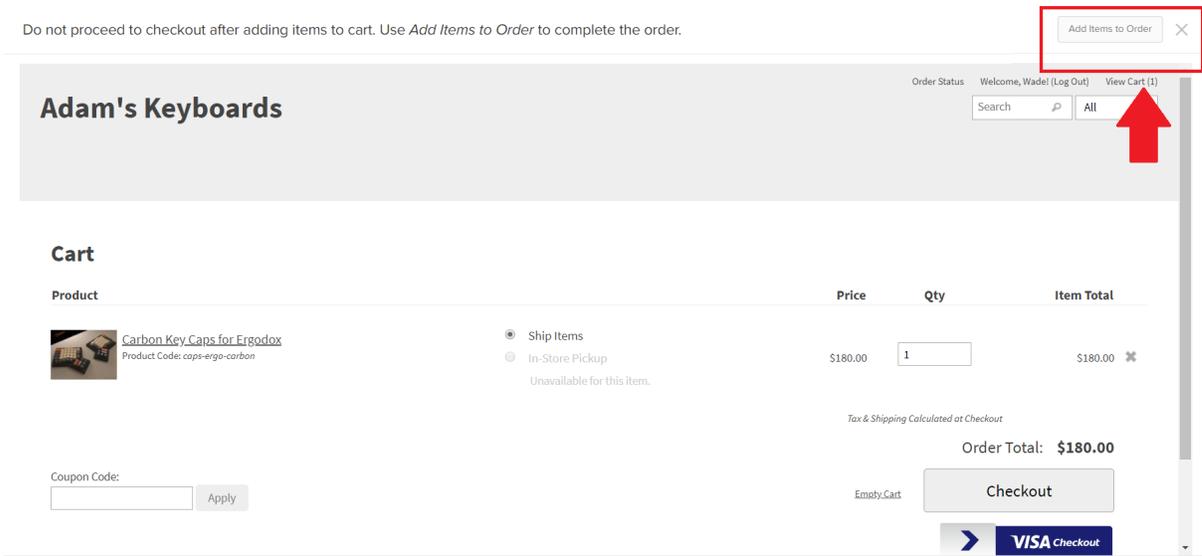
Add Items to Order

The screenshot shows the product page for 'Carbon Key Caps for Ergodox'. The breadcrumb trail is 'Key Caps > Carbon Key Caps for Ergodox'. The page features a navigation menu with 'Keyboards', 'Parts', 'Key Caps', 'Misc', and 'Accessories'. The product title is 'Carbon Key Caps for Ergodox'. Below the title is a large image of the key caps and a smaller thumbnail. The 'Summary' section contains the following text: 'Named for the element on the periodic table and designed by A. Schmidt (you may know him as spoonyluv47 on Reddit, or T0mb3ry on GeekHack) and made in Germany - this is the first time a GMK ergodox / Planck set was created.' The 'Price' is listed as '\$180.00'. The 'Product Code' is 'caps-ergo-carbon'. Below the price and code are three buttons: 'Add To Cart', 'Add To Wishlist', and 'Check Local Stores'. A quantity selector shows 'Qty | 1'. The 'Description' section is partially visible at the bottom.

7. When all items have been added, click **Add Items to Order** in the top right to exit the takeover and allow the shopper to complete checkout on their own.



Do not click Checkout while doing a cart takeover, unless you intend to enter the customer's payment information yourself as an offline order.



## Cart Takeover for Kibo Headless Storefronts

Headless integrations can use cart takeover with external storefronts. Admin users can either follow a link on the Customers page to access the storefront directly, or submit an offline order populated with items from the shopper's cart. External cart takeover is not supported for anonymous shoppers.

Contact to enable this feature.

### View the Kibo Headless Storefront

In addition to the offline order page as shown above for non-headless cases, headless integrations will also display **View User's Cart** buttons on the **Main > Customers > Customers** table and the customer details page. Clicking either of these buttons will prompt you to select a site before continuing to the external storefront to edit the cart there.

Customer ID	First Name	Last Name	Email	Shopper Acct	Purchase Orders	Status	Fulfilled Orders	Lifetime Value	Total Visits	Segments	
1000	Adam	Tester	example.customer...	Y	N	Active	41	2856.25	11	None	
1001	John	Doe	example.customer...	Y	N	Active	0	0	3	None	Edit
1001	Example	Customer	example.customer...	Y	N	Active	0	0	3	None	Unlock
1001	Sam	Admin	example.customer...	Y	N	Active	0	0			View User's Cart

	Full Name	Adam Tester	Default Shipping Address	Adam Tester 717 N HARWOOD ST Dallas, TX 75201-6501 US Home: (512) 999-1111	Account Status	<b>Active</b>	<a href="#">View User's Cart</a> 
	Customer ID	<b>Shopper 1000</b>	Default Billing Address	Adam Tester 717 N HARWOOD ST Dallas, TX 75201-6501 US Home: (512)-999-1111	Purchase Orders	<b>Disabled</b>	
	Shopper ID	example.user@kibocommerce.com			Customer Since	Apr 27, 2023	

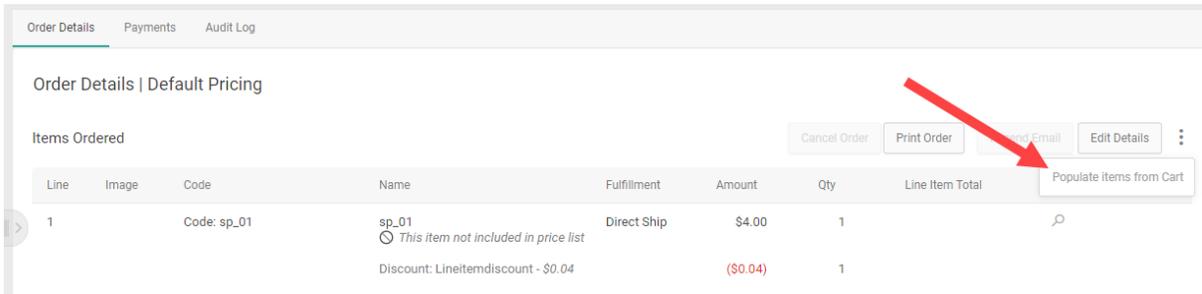


When viewing a [B2B account](#), clicking any user in the table will redirect you to the above customer details page. From there, you can view the user's cart and perform a takeover using the same process as documented here.

## Create Order in Admin UI

If creating a new order in the Admin UI, any changes will not be reflected on the external storefront. This means that you will have to submit it as an offline order, instead of releasing it for the shopper to checkout on their own.

1. After creating a new order and selecting the customer, click **Populate Items from Cart** in the actions menu. This will add all items from the shopper's external cart to the order.



Order Details | Default Pricing

Items Ordered

Line	Image	Code	Name	Fulfillment	Amount	Qty	Line Item Total	
1		Code: sp_01	sp_01 ⓘ This item not included in price list	Direct Ship	\$4.00	1		
			Discount: Lineitemdiscount - \$0.04		(\$0.04)	1		

Actions: Cancel Order, Print Order, Send Email, Edit Details, **Populate items from Cart**

2. Click **Edit Details** to add/remove items, select a shipping method, or perform adjustments.
3. Click **Save** on the Edit Details modal when complete.
4. Enter the customer's payment information in the **Payments** tab.
5. Click **Submit Order** in the top right of the page.