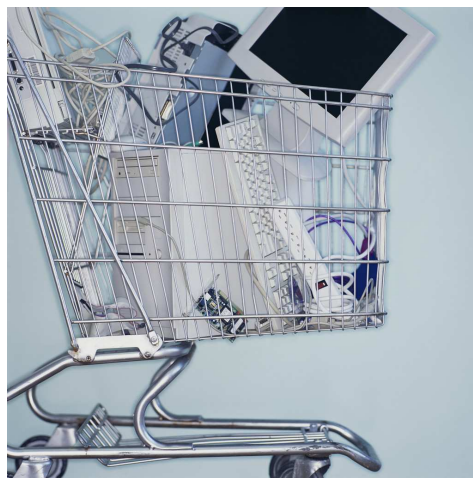


Working with a Shopper's Orders

Chapter 6



Copyright University of Pittsburgh. All rights reserved.

Working with a Shopper's Orders

Section Objectives

At the end of this section, you should be able to:

- View a Shopper's orders
- Assign an account number to an order
- Approve a Shopper's order
- Reject a Shopper's order
- View PR History

The Shopper Role

A Shopper is another role in the PantherBuy application.

- While a Shopper can search for items and add them to a shopping cart, a Shopper cannot enter account number information into the order.
- A Shopper cannot submit an order directly to a supplier.
- Once a Shopper submits an order it is reviewed by a Department Buyer. The Buyer enters the account number information and submits the order for approval.
- The Shopper role can be very helpful in high volume purchasing areas, and also when orders are complex and the department buyer might not be familiar with the items needed.
- The Shopper role is typically popular in areas that do scientific buying.
- Department Buyers have the ability to reject a Shopper's order.

Working with a Shopper's Orders

Login to Panther Buy as a Shopper. Enter an order for a dry erase board from Garcia Marketing. Enter a second order for a desktop lamp from Target.

1. Navigate to the *Home* page

| |
|-------------------------|
| Panther Buy N → Home |
|-------------------------|

2. Click on Logout
3. Log back into *PantherBuy* as a Shopper
 - Username - shp#
 - Password – password
4. Submit a separate order for each of the following items
 - Item 1
 - Supplier – Garcia Marketing (Catalog)
 - Dry Erase Board (#6117-4920)
 - Quantity – 1 @ \$184.06
 - Item 2
 - Supplier – Target (Punchout)
 - Desk lamp (#LEDL557BL)
 - Quantity – 1 @ \$55.44
5. Log Back into PantherBuy as a Department Buyer

Working with a Shopper's Orders – Account Code Assignment

6. Locate the Approvals link in the *Action Items* area

- Under the Approvals link is a link to the “Unassigned Approvals”

The screenshot shows a sidebar menu titled "Action Items" with a help icon. The menu items are: "My Orders", "Requisitions" (with sub-items "Returned (1)", "Pending (13)", "Recently Completed (14)"), "Purchase Orders" (with sub-items "Pending (4)", "Recently Completed (14)"), and "Approvals" (with sub-item "Unassigned Approvals" and "Requisitions (2)"). The "Approvals" and "Unassigned Approvals" items are enclosed in a red rectangular box.

7. Click on the link

8. The two requisitions that you created as a Shopper will appear at the top of the list

The screenshot shows a table titled "Dent Med-Office of the Dean (Account Code Assignment)". The table has columns for Requisition No., Approver, State, Approval Priority, PR Date/Time, Requisitioner, Amount, Action, and Select. Two requisitions are listed:

| Requisition No. | Approver | State | Approval Priority | PR Date/Time | Requisitioner | Amount | Action | Select |
|--|----------|-----------------------------|-------------------|--------------------|-------------------|------------|--------|--------------------------|
| 322225 view | | Not Assigned | Normal | 7/30/2009 10:43 AM | Shopper Shopper55 | 55.44 USD | Assign | <input type="checkbox"/> |
| Requisition Name: 2009-07-30 shp55 01 Cart Description: No. of line items: 1 | | Suppliers: Target Office | | | | | | |
| 322223 view | | Not Assigned | Normal | 7/30/2009 10:41 AM | Shopper Shopper55 | 184.06 USD | Assign | <input type="checkbox"/> |
| Requisition Name: 2009-07-30 shp55 01 Cart Description: No. of line items: 1 | | Suppliers: Garcia Marketing | | | | | | |

9. Select the two requisitions you created by clicking on the check boxes at the end of each row

Working with a Shopper's Orders – Account Code Assignment

10. Click in the drop down box and select *Assign*

| Requisition No. | Approver | State | Approval Priority | PR Date/Time | Requisitioner | Amount | Action | Select |
|---------------------------------------|--------------|------------|--------------------|-------------------|---------------|--------|-------------------------------------|--------|
| 322225 | Not Assigned | Normal | 7/30/2009 10:43 AM | Shopper Shopper55 | 55.44 USD | Assign | <input checked="" type="checkbox"/> | |
| Requisition Name: 2009-07-30 shp55 01 | | Suppliers: | | Target Office | | | | |
| Cart Description: | | | | | | | | |
| No. of line items: 1 | | | | | | | | |
| 322223 | Not Assigned | Normal | 7/30/2009 10:41 AM | Shopper Shopper55 | 184.06 USD | Assign | <input checked="" type="checkbox"/> | |

11. Click on *Go*.

12. Your login name will now display as the Approver, and copies of the requisitions are placed in the *My PR Approvals* folder. You can take action on the requisitions from the either folder.

| Requisition No. | State | Approval Priority | PR Date/Time | Requisitioner | Amount | Action | Select |
|---------------------------------------|--------|-------------------|--------------------|-------------------|-----------|---------|--------------------------|
| 322225 | Active | Normal | 7/30/2009 10:43 AM | Shopper Shopper55 | 55.44 USD | Approve | <input type="checkbox"/> |
| Requisition Name: 2009-07-30 shp55 01 | | Suppliers: | | Target Office | | | |
| Cart Description: | | | | | | | |
| No. of line items: 1 | | | | | | | |

| Requisition No. | Approver | State | Approval Priority | PR Date/Time | Requisitioner | Amount | Action | Select |
|---------------------------------------|--------------------|------------|-------------------|--------------------|-------------------|-----------|--------|--------------------------|
| 322225 | Department Buyer55 | Assigned | Normal | 7/30/2009 10:43 AM | Shopper Shopper55 | 55.44 USD | | <input type="checkbox"/> |
| Requisition Name: 2009-07-30 shp55 01 | | Suppliers: | | Target Office | | | | |
| Cart Description: | | | | | | | | |
| No. of line items: 1 | | | | | | | | |

Working with a Shopper's Orders – Account Code Assignment

13. Click on *View* to see the requisition for the Dry Erase Board (\$184.06).
14. Go to the Accounting Codes area and click on *Edit*.
15. Enter the following account number
 - 02.49010.6000.00000.000000.000000.000000
16. Click on *Save*
17. Click in the *Available Actions* drop down box at the top right corner of your screen.




18. Select *Approve/Complete Step*
19. Click on *Go*.

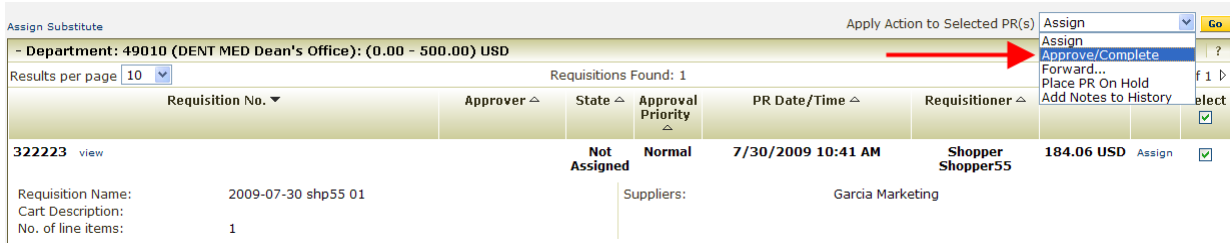
Working with a Shopper's Orders – Approving Orders



20. The requisition will be removed from the department *Account Assignment* folder and the *My PR Approval* folder, and will now move into the appropriate Department folder for order approval.
21. Open up or scroll to the appropriate Department folder associated with the dollar amount of the order.
 - (0.00 – 500.00)
22. Since the order has already been reviewed and the account number entered, you do not need to review the order again.
23. Since the order is not being edited it is not necessary to assign it to yourself.
24. Select the order by checking the box at the end of the line.

Working with a Shopper's Orders – Approving Orders

25. Select *Approve/ Complete* from the drop down menu and click on .



The screenshot shows a web interface for managing requisitions. At the top, it says "Assign Substitute" and "Apply Action to Selected PR(s)". Below that, it displays "Department: 49010 (DENT MED Dean's Office): (0.00 - 500.00) USD". There is a "Results per page" dropdown set to 10 and "Requisitions Found: 1". A table lists the requisition details:

| Requisition No. | Approver | State | Approval Priority | PR Date/Time | Requisitioner | | |
|-----------------------------|----------|--------------|-------------------|--------------------|-------------------|------------|--|
| 322223 view | | Not Assigned | Normal | 7/30/2009 10:41 AM | Shopper Shopper55 | 184.06 USD | Assign <input checked="" type="checkbox"/> |

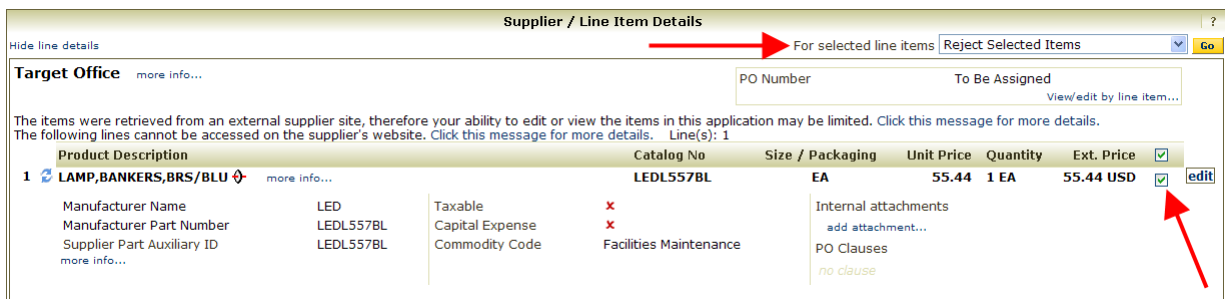
Below the table, there are fields for "Requisition Name: 2009-07-30 shp55 01", "Cart Description:", "No. of line items: 1", and "Suppliers: Garcia Marketing". On the right side, an action menu is open, showing options: "Assign", "Approve/Complete", "Forward...", "Place PR On Hold", and "Add Notes to History". A red arrow points from the "Approve/Complete" option to the "Go" button at the top right of the menu.

26. The order is approved and removed from the Department folder.

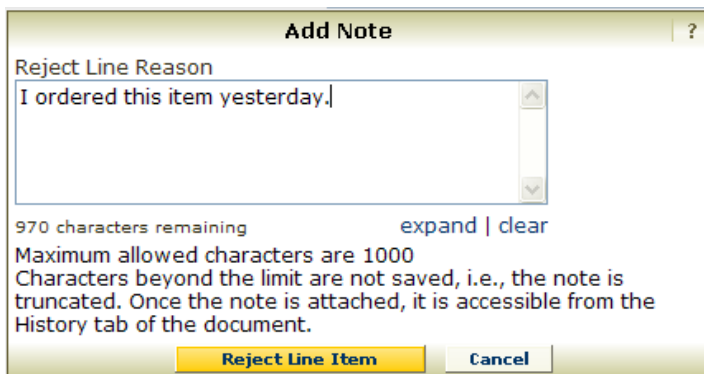
Working with a Shopper's Orders – Rejecting Orders

Reject a line item in a Shopper's requisition

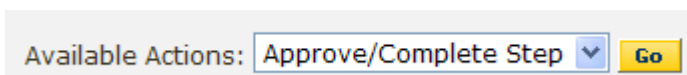
27. View the next order awaiting Account Assignment
 - lamp from Target Office Products (\$55.44)
28. Scroll to *Supplier/Line Item Details*
29. Click in the check box at the end of the line item
30. Click in the drop down box and select *Reject Selected Items*
31. Click on *Go*.



32. Enter a reason for rejecting the line item and click on *Reject Line Item*.



33. Scroll to the top of the screen. From the *Available Actions* drop-down box, choose *Approve and Complete Step*.



34. Click on *Go*.