Department Buyer User Guide

Help
Contact PantherBuy via email at: PantherBuy@bc.pitt.edu
Remember, you can find useful information on our website too:
www.pantherbuy.pitt.edu

Accessing the System
1. Open your web browser and go to https://solutions.sciquest.com/org/pittsburgh
2. Enter your Username and Password. Click “GO”

Setting up Default Ship-To Addresses
1. Click on “*Profile*” near the upper left-hand corner of the page.
2. Click on the “*Purchasing*” tab, then select “*Addresses*.”
3. Click on the “*Select Addresses for Profile*” button.
4. Enter your standard building abbreviation in the Nick Name field; click *Search*.
5. Click on the radio button to select the address. Add the room number to the address. You can leave the Nick Name field as the building name, or change it to something descriptive, e.g. Garrett’s Lab.
6. If you want the address to serve as the default Ship-To location, click in the *Default* box.
7. Click on *Save.*

Using Search Tools
Click on **Product Search** to narrow a search by entering the **Product Description**, **Supplier Name** and **Catalog Number**. Click on ? for additional Product Search Help.

Other Searches
Browse by Supplier
- Click on the “Supplier” link from the Other Searches section to view an alphabetical listing of suppliers. Click on a supplier name to display the supplier’s contact information and the list of categories and items available from the supplier.

Browse by Category
- Click on the “Category” link from the Other Searchers section to view a listing of available product categories. Click on the ⊞ to expand and view listed products within each category. Click on view (incl. sub-categories) to see products in a Search Results listing.

Chemical Resource
- Click on the “Chemicals” link from the Other Searches section to locate chemicals and reagents by their molecular structure or sub-structure. Using a plug-in by ChemDraw, users can draw structures and the system provides a list of matching items in the results display.

Speciality Laboratory Searches
Antibodies
- Antibodies Use the Antibodies search under Categories to find and compare antibodies by specific parameters.

Place an Order
1. After locating an item for purchase, enter a number in the Quantity field and click on [cart icon] - Add to Cart.
2. Search for another product by refining or adding criteria at the top of your results page by clicking on + Expand to refine search. You can also search by returning to Product Search.
3. When finished adding products to the requisition, click in the outlined box with the cart [cart icon] in the upper right corner of the page.
4. Review the products in your shopping cart.
5. To remove an item, click the ☑ next to the item then select For selected line items Remove Selected Items Go and click on *Go*.
6. To change the quantity of any items in your cart, update the quantity and click Save .
7. Click on the Review button in the workflow diagram.
8. Assign account numbers in the Accounting Codes section by clicking on the *Edit* button.
9. Click Submit Requisition in the workflow diagram to submit the order.

Quick Order
Quick Order adds items directly to your shopping cart by entering their associated catalog numbers.
1. Click Quick Order in the Products Search screen and enter the catalog number/numbers.
2. Click on *Add To Active Cart*. If an exact match is found, the product will automatically be added to your cart.

Punchouts
Punchouts access suppliers’ websites through the PantherBuy system. By clicking on the supplier icon, you can shop directly from the supplier’s website, which offers pricing negotiated by Pitt, and submit items into your Shopping Cart. These Punchouts can be found on the Home page, under the “*Product Search*” tab. The Punchouts are listed below the blank search fields.

My Favorites ***(for catalog items only)***
Track and resubmit frequently ordered products by adding products to your Favorites list:

1. To create a *Favorites* folder, click on *Favorites* (on Navigation bar), *Edit Folders*. Click on New Subfolder icon (across from *My Favorites*).
2. Enter Folder name. Click on *Submit.*
3. To add products to **My Favorites**, click the ☑ next to each of your 'favorite' products on either the **Search Results** or **Checkout** screens and select "Add To Favorites" from the dropdown list**.** Click *Go*. Select the folder destination. You can rename the item, and default a quantity if you choose. Click *Submit*.
4. To access the *Favorites* list simply click the *Favorites* tab from the navigation bar, or click *Favorites* from the Product Search area. Open the appropriate *Favorites* folder.
5. To add a product(s) to your shopping cart from your *Favorites* list, click the ☑ next to the product(s), enter a quantity and click "Add to Active Cart".
6. To remove a product, click the delete button next to the product on your *Edit Folders* page of *My Favorites*.

Split Distributions

Split Charges for a Single Line Item

1. Search for the item and add it to your cart. View the cart.
2. Click on "Review" button.
3. Click on the ***Accounting Codes*** tab in the Requisition menu (above General Information).
4. Scroll to the Supplier/Line Items Details section.
5. Click the ***Edit*** button for the appropriate line item.
6. ***Assign your Account Code Here*** window pops open. Click ***Add Split***.
7. Enter the account numbers that you are charging.
8. Choose your split method from the Drop-Down box.
9. Enter the percentage or amount being charged to each account.
10. Click on ***Recalculate*.** Click *Save*.
11. Submit requisition for approval.

Split Total Cost of Order

1. Search for the item and add it to your cart. View the cart.
2. Click the *Review* button
3. Scroll to Accounting Codes region. Click on *Edit*.
4. Follow steps 6-11 above.

Cart History

1. Click on "History" in the navigation menu bar.
2. Click on "PR History".
3. Check the *Filter* box; Specify a date range of a past cart.
4. Optionally, enter the product number or requisition name.
5. Click on *Search*.
6. Click on a Req.# to view its details

7. View orders also by clicking on *History*, *My Requisitions* or *My Purchase Orders.*

Printing a Copy of a Purchase Order

1. Click on "History" in the navigation menu bar.
2. Click on "PO History".
3. Click on "by PO No.".
4. If you have a certain PO number that you would like to print, you may enter the PO number into the search field. If you are looking to print out multiple POs, or you do not know the PO number, check off the Filter box.
5. Click *Search*.
6. All PO search results will appear. Next to the PO Number will be a printer icon. Click this icon to print the PO.

Credits

1. Contact the Supplier to inform them that you are returning an item.
2. Inform the Supplier that they must send a credit memo to Payment Processing. Or if you prefer to receive the credit memo yourself, please be sure that you send a copy to Payment Processing so that your credit will be applied.

Checking Credit History

1. Click on the following: *History→By PO No.→Filter→My Orders→Search*
2. Locate the order; click on the PO number.
3. Click on the *Invoices/Credits* tab.
4. Click on Credit #, then the Codes tab. Line Item Details area will display credit quantity, credit amount, and account(s) credited.

Invoice Discrepancies

1. If there is an invoice discrepancy with your order, you will first be contacted by Payment Processing via email.
2. Within the email there will be a comment from Payment Processing and also a link that will take you to the PantherBuy system.
3. Click on the link and review the order and the invoice. Be sure to check the ***Matching*** tab.
4. Once you review and approve, please go to the ***Comments*** tab and click on "Reply To" next to the name of the individual who contacted you from Payment Processing.

**** NOTE** SUPPLIERS ARE NOT PERMITTED TO AUTOMATICALLY SUBSTITUTE PRODUCTS!**

Copy a Requisition

1. Click on the following: History→*My Requisitions*
2. Locate the requisition you want to copy; click on the req. no.
3. From the Available Actions drop down menu, choose *Copy to New Cart*
4. Click on *Go.* A copy of the order will be placed in a new cart.