Entering Orders in PantherBuy

Chapter 2


Entering Orders in PantherBuy

Section Objectives

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

- Purchase Catalog items

- Purchase Punchout items

- Select different Ship-To locations

- Create orders with multiple account distributions

- Split the account distribution for a single item in a multi-line order

- Split the account distribution for the total cost of the order

- Enter an order for a radioactive substance

- Add items to a shopping cart using Quick Order
Adding Items to a Shopping Cart in PantherBuy

- **Favorites** – from the Home page users can click on the Favorites tab or the Favorites link, which is located below “Shop Hosted Catalogs”, select the folder where the favorite items are, and select items to add to the Shopping Cart. **PLEASE NOTE:** Favorites can only be used with Hosted Catalog Suppliers.

- **Quick Order** – this feature can be used to search for and add multiple items to a cart at once when the exact SKU’s are known.

- **Punchout** – Punchout allows you to access a supplier’s website, search for products, and return them to the shopping cart in PantherBuy.
Entering Orders in PantherBuy – Catalog Items

Purchasing Catalog Items

Create an order for goggles and gloves from Cosh Healthcare, Ltd. for the Orthodontics lab. Search by catalog #. The order will be within your approval limits ($500.00).

1. Navigate to the Product Search window.

PantherBuy
N → Home/Shop
2. Search for goggles and add them to your shopping cart by clicking on the Add to Cart button
   - 19014012
   - Change the quantity to 2 (pk)

3. Return to the “Shop Hosted Catalogs” area for a new search. Clear the old information away.

4. Search for latex gloves.
   - 19014477 (1 doz.)
Entering Orders in PantherBuy – Catalog Items

5. Scroll to the top of the page and click on to view your shopping cart.

- *2010-12-03 dbt1* is the default name of the requisition.
- Change the name to something more descriptive by entering a new name in the *Requisition Name* field, then click *Update*.

6. Click on the *Proceed to Checkout* button.

- This diagram is located at the top left hand section of the page.

7. Your default Ship-To address will display in the Shipping region.
**Entering Orders in PantherBuy – Catalog Items**

Your Default Account Number will appear in the Accounting Codes section of the requisition. To change the account number on the order, follow the steps below.

8. Click on the first `edit` button in the Accounting Codes section.

   - The top section is for **ASSIGNING** account numbers and the bottom section is for checking to see if an account number is valid. When checking an account use this format for the account code: `xx-xxxxxx-xxxxxx-xxxxxx-xxxxxx-xxxxxx`. Be sure to include all 32-digits of the account number.

   - After clicking on the first `edit` button, a new box will pop up on top of your screen to fill in the segments of the account number.

9. Select **Entity** and **Department** codes from your profile values

   - Entity - 02
   - Department - 49010

10. Enter values for **Subcode**, **Purpose**, **Project** and **Reference**.

    - Subcode – 6010

    - **Do not leave unused segments blank; they must be filled in with zeros.**

11. Click on `Save` button to return to the requisition.

12. Review the requisition once more before clicking on `Submit Requisition`. 
13. Look over the Requisition Information.

14. Click on View (next to requisition #) or Quick View. You can view and print your requisition from either screen.

15. Notice the status of the requisition.
   
   • The status is *Completed* since the order is within your spending limits.
   
   • A PO number is generated once a requisition is approved; all PantherBuy purchase orders begin with PB (pay on PO) or E (if an electronic invoice supplier).
16. View the PO

- You will automatically be taken to the Status tab of the PO

17. Notice in Document Status

- WorkFlow is Completed (PO is approved)
- PO has been sent to the Supplier
**Entering Orders in PantherBuy – Split Distribution**

**Split Distributions**

- A PantherBuy order can have one distribution line or multiple distribution lines.
- There is no limit to the number of accounts to which line items get charged.
- Charges can be split for individual line items or for the total cost of the order.
- You can split charges using the following options:
  - % of Price
  - % of Quantity
  - Amount of Price
  - Amount of Quantity
- To split charges for individual line items you must first click on the Accounting Codes button in the workflow or go to the Accounting Codes tab that is above the General and Shipping information.

**OR**

- To split charges for the entire cost of the order, just click on Edit in the Accounting Codes assignment area.

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Department Buyer User Guide

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Entering Orders in PantherBuy
Entering Orders in PantherBuy – Split Distribution

Create an order for a video camera and rechargeable battery from Garcia Marketing (catalog vendor). The order will be over your approval limit ($500). Change the Ship To address, add an Internal Comment to the order, and create a Split Distribution for the video camera.

1. Search for the video camera via its Catalog number.
   - 6109-0044
     This is a Garcia Marketing product.

2. Add this item to your cart by clicking on the shopping cart button.

3. Search for another product by clearing the information from the “Shop-at-the-Top” and clicking on the advanced search link next to the “Go” button.
Entering Orders in PantherBuy – Split Distribution

4. Search for the “Rechargeable Battery Pack” via its Catalog number
   - 6108-4641
5. Click on the “Add to Cart” button.
6. Review the cart by clicking on the cart summary

7. Click on the **Proceed to Checkout** button.

8. Change the Ship To address by clicking on Shipping button in the work flow or click on the **edit** button in the Shipping area.

   - A separate box will pop up.

9. Select the correct address by using the drop down menu.
   - Salk-1128

10. Click on the **Save** button.
**Entering Orders in PantherBuy – Split Distribution**

**Internal Notes**

11. Add an internal note to this order.

12. Click on the **edit** button in the *Internal Notes and Attachments* section. A new window will pop up.

   - Internal notes can only be seen by users from the University of Pittsburgh. Suppliers will not see these notes.
   - Users can place an *External Note* on an order if they wish, however, there is no guarantee that the supplier will receive the note. Individual suppliers have different capabilities. The supplier(s) that the note is going to may not have the ability to see that comment.
   - If ordering from Valley National Gas, you must include an *External Note* that includes Pitt’s customer id number.

13. Enter the note for the order in the space provided.

   - Click on the **Save** button.
Entering Orders in PantherBuy – Split Distribution

Split Distribution for a single line item

14. Click on the Accounting Codes tab in the Requisition menu or in the work flow menu.

15. Scroll down to the Supplier / Line Item Details section.
   - Click on the edit button for the line containing the video camera.

16. A box will pop up asking for account numbers to be assigned. Click on the link.
   - Keep in mind that your default account number will appear in the pop up window in the production system.
Entering Orders in PantherBuy – Split Distribution

17. The current box will split into two sections for assigning account numbers.

   - In the productions system, both lines will contain your default account number.

18. Assign the first account number

19. Click on the link under Entity that says “Select from profile values...” From the drop down menu select:

   - 02

20. Click on the link under Department that says “Select from profile values...” From the drop down menu select:

   - 49010

21. Enter the subcode; enter zeros for any unused segments.

   - 6020

22. Enter the second account number

   - 04.49010.6020.22950.000000.000000.000000

Note:

   - As many splits as needed can be added. Splits can be applied to line items in one of four ways;
     - Percentage of price
     - Percentage of quantity
     - Amount of price
     - Amount of quantity
   - These can be selected by going to the drop down menu in the upper right hand corner.
Entering Orders in PantherBuy – Split Distribution

23. Choose to split the line by *Amount of Price* from the drop down.
   - Enter 600 for the first account number.
   - Enter 800 for the second account number.
   - Click on recalculate / validate values.

24. Click on Save.

25. Assign an account number for the Powerpack Kit.

26. Click on edit in the *Accounting Codes* section at the top of the page. Your default account number will appear in this area. This account number will be applied to all other lines of the requisition where a split did not occur.

27. Enter the following account number
   - 05.49010.6020.00000.002691.00000.00000

28. Click on Save.

29. Click on the Summary tab in the *Requisition* menu to return to full view of order.
   - If you need to go back to check/edit account codes, just click on the Accounting Codes tab on the menu.

30. Review the order.

31. Click on Submit Requisition to submit the order.

32. View the Requisition by clicking on the requisition number.
**Entering Orders in PantherBuy – Split Distribution**

33. Notice in the General Section

- The order is pending approval
- A PO # has not been generated yet

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<tr>
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<tr>
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<td>Department Buye:55</td>
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<td>Dent Med-Office of the Dean</td>
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<tr>
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Lab 2: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

1. Order the following items from Smart Solutions Technology. Use the Browse by Supplier search tool to find the items.
   - 1 motorized projection screen, 96” x 96” (cat.# Access E104006)
   - 2 motorized projection screens, 79” x 140” (cat.# Access E 104023)
   - 3 overhead projectors (cat.# v4002)

2. Split the total cost of the order between two accounts (Hint: click on the Edit button in the Accounting Codes region; click on Add Split)
   - Split by % of Price
   - Charge 60% to 02.49010.6020
   - Charge 40% to 04.49010.6020.22950

3. Submit the order.

4. What is the status of the order?
Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

1. Navigate to the Home/Shop page.

2. Click on the Browse by Supplier link that is located under the “Shop-at-the-Top”

3. Locate SMART Solutions Technology from the list of Suppliers.

4. Click on the Hosted Catalog Supplier icon, ☰, to pull up the categories offered in the catalog.
Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

5. Click on view (incl. sub-categories) for Printing and Photographic and AV Supplies.

6. In the “Refine and Filter Search” area, go to the By Category area to filter out your results.
   - Click on “show all” link to pull up a listing of the categories
   - If there is a long list of categories, you may have to click on the “more…” link.
   - Filter out the results by selecting “Projection screens or displays”
**Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order**

7. Locate the following line item
   - Motorized Projection Screen, 96” x 96” (Access E 104006)

8. Order 1 of these by selecting the “Add to Cart” button

9. Locate the 2nd line item
   - Motorized projection Screen, 79” x 140”, HDTV (Access E 104023).

10. Change the quantity to 2.

11. Click the “Add to Cart” button.

12. Locate the 3rd line item by searching via the catalog number and using the “Shop-at-the-Top”
   - V4002, an overhead projector.

16. Change the quantity to 3.

17. Click on the Add to Cart button to add the item to your cart.

18. Review your order by clicking on
   - Click on the Proceed to Checkout button.
Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

Split Distribution – Split Total Cost of Order

19. Click on the **edit** button in the *Accounting Codes* section.

20. Click on the **Add Split** button.

   - The screen will split into two separate account codes.
   - You can split two different ways:
     - percentage of price
     - percentage of quantity.

21. Add this split by percentage of price.

   - Charge the 02 account for 60% of the price – 02.49010.6020
   - Charge the 04 account for 40% of the price – 04.49010.6020.22950
   - Click on **Save**.

22. Click on **Final Review** to review the order.

23. Click **Submit Requisition**.
Entering Orders in PantherBuy – Punchouts

Create an order for clasp envelopes, steno pads and fax post-its. Search on the Office Depot Punchout site. The order will be within your approval limits.

PantherBuy
N → Home/Shop

1. Click on the Office Depot Punchout.

   - The Punchout will automatically load to the webpage.
   - Each Punchout will have different navigation through their site.
   - If you click on the wrong Punchout, or realize that this supplier does not have what you are looking for, you can click on the Cancel Punchout button, which is located in the upper right hand corner, to be taken back to PantherBuy.

2. Locate the Search Center area in the top left hand corner of the screen.
Entering Orders in PantherBuy – Punchouts

3. Search for envelopes.
   - 330840

4. Click on the button.

5. Enter the Quantity to be ordered
   - 3

6. Click the button.
   - You will automatically be taken to the cart for review. Once in the cart you can edit the quantity or remove items.

7. Return to the Search for area and search for Steno Pads
   - 305706

8. Enter the quantity to be ordered
   - 3

9. Click the button.

10. Search for 3M Super Sticky Post-it Notes, 4”x6”, Lined Notes, etc.
    - 203352
Entering Orders in PantherBuy – Punchouts

11. Enter a Quantity

   – 3

12. Click on **Add To Cart** button.

13. Review your cart and click the link for **Check Out**.

14. You will then get another Cart confirmation before you leave the supplier’s website. Click on the button that says **Continue**.

15. PantherBuy will automatically pull the cart, and all its contents back into the PantherBuy system.
16. Make sure all of the information is correct.

17. Click **Proceed to Checkout** and complete the order.

Removing items from a Punchout order

- Each Punchout Vendor operates differently. Some of the suppliers will allow you to remove an item from your shopping cart by selecting the check box at the end of the line item and then selecting **Remove Selected Items** from the drop down menu.

- Other Punchout Vendors do not allow you to remove individual line items. You can only remove all items.
Entering Orders in PantherBuy – Punchouts

17. Click on **Proceed to Checkout** button.

18. Edit *Shipping* information, if necessary.

19. Click on the first **edit** button in the *Accounting Codes* section.

20. Select *Entity* and *Department* codes, add the rest of the account code.
   - 02.49010.6000.00000.00000.00000

21. Click on **Save** button.

22. Review the requisition then click on **Submit Requisition**.

23. Look over Requisition Information.

### Requisition Information

**Congratulations! You have successfully submitted your request.** If you need to view or print a copy, click **Quick View** or view its status on the **Approvals Tab**.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

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<td></td>
</tr>
<tr>
<td>Number of line items</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

What would you like to do next? Here are links to some common actions.

- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart

24. Click on **View**

25. What is the status of your order?
Entering Orders in PantherBuy – Radioactive Materials

Create an order for HYPOXATHINE MONOHYDROCHLORIDE. Punchout to PerkinElmer. Search for this radioactive substance by catalog number (NET177001MC).

PantherBuy
N → Home/Shop → Punchout → PerkinElmer

1. Enter in the following catalog number into the Search box.
   - NET177001MC

2. Change the quantity to 6 and add this item to the punchout shopping cart.

3. Click on Checkout to pull the order back into PantherBuy.

This symbol that is at the end of the Product Description denotes that the item is a radioactive substance.
Entering Orders in PantherBuy – Radioactive Materials

4. Click on the “Name this Cart Field” at the top of the page

5. Type in “Radioactive Material for Miller’s Lab” to change the name of the Requisition Name.

![Image of Shopping Cart](image)

6. Click on the button to apply changes.

7. Click the .

8. Click and update the accounting code.

   - 05.49010.6010.00000.002691.00000

8. Submit the requisition.

NOTE:

- **ALL RADIATION ORDERS MUST BE ORDERED SEPARATELY.** Do not order radioactive and non-radioactive materials on the same PO. If you do, then that order will not be approved by Radiation Safety.

- Once the requisition is approved and becomes a purchase order (PO), it will automatically forward to Radiation Safety for approval.

- If your radioactive order is over $5,000.00, it will first be sent to Purchasing Services for approval before going to Radiation Safety.

- Radiation Safety will manually go into the PO and change the Ship To address to their location.
Entering Orders in PantherBuy – Quick Orders

Enter an order using PantherBuy’s Quick Order screen. This will allow users to search for and add multiple items to their carts at once by entering in product numbers (SKU’s) for each item.

1. Navigate to the Quick Order screen.

   - Notice that you can enter up to five (5) items at a time.

2. Enter the following product numbers exactly as they appear below.
**Entering Orders in PantherBuy – Quick Order**

- 6117-4540
- 6101-1900
- 6101-1702
- CPM-13310
- I80052

3. Click on *Add to Active Cart*.

   ![Add to Cart Confirmation](image)

   - Notice the *Add to Cart Confirmation* area on the bottom of the screen. This area will inform users what products were able to be added directly to the cart.
   - Also notice the last item that was on the list, I80052 was not a valid catalog number and therefore PantherBuy did not recognize the SKU.

4. Click on the shopping cart to complete the order.

**Removing items from a Hosted Catalog Supplier order**

In order to remove an item you do not wish to order:

5. Items can be removed from the cart by either clicking on the *Remove* button beside the item or by selecting the check box at the end of the line. For Example:

   -- Magn Glassct Dry-Erase Board 4′X 6′-Alum/Titan Frame
Note: It is only necessary select Remove Selected Items from the drop down menu when you remove an item by selecting the box at the end of the line.

7. Once either of the two actions is performed, the item will be removed from the order.

8. Click on **Proceed to Checkout** to edit any of the information.

9. Assign account number 02.49010.6000.22950.000000.00000.
   
   • This is not a valid account number, so the system will reject this order. In the History module, you will learn how to copy a rejected order and correct the copy.

10. Submit the *requisition*. 