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”

7. Click on the link

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

   ![Image of Action Items]

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

   ![Image of Requisitions]

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Working with a Shopper’s Orders
Working with a Shopper’s Orders – Account Code Assignment

10. Click in the drop down box and select Assign

![Assign substitute](image)

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.

![My PR Approvals](image)
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
   - 02.49010.6000.00000.00000.00000.00000.00000

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.
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 Go.

![Approving Order Image]

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.