Entering Orders in PantherExpress

Chapter 2
Entering Orders in PantherExpress

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 PantherExpress

- **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 PantherExpress.
**Entering Orders in PantherExpress – Catalog Items**

Purchasing Catalog Items

Create an order for goggles and gloves from Spectrum Laboratory Products for the Orthodontics lab. Search by catalog #. The order will be within your approval limits ($500.00).

1. Navigate to the *Product Search* window.

   PantherExpress
   N → Home/Shop
**Entering Orders in PantherExpress – Catalog Items**

2. Search for goggles and add them to your shopping cart by clicking on the *Add to Cart* button
   - Search by Catalog #301-83786-E1
   - If multiple suppliers have similar catalog numbers, you can filter results by Supplier Name
   - Enter the quantity (2 each), and click *Add to Cart*

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

4. Search for gloves.
   - 101-83717-P5
   - Order 1 pk
Entering Orders in PantherExpress – Catalog Items

5. Scroll to the top of the page and click on the cart link 20.74 USD, and then click on View My Cart to view your shopping cart.

   • “2015-08-13 dbt1 01” (today’s date & login name) is the default name of the requisition.
   • Change the name to something more descriptive by entering a new name in the Name this Cart field, then click Update.

6. Click on the Proceed to Checkout button.

   • The diagram below displays at the top left hand section of the page.

7. Your default Ship-To address will display in the Shipping region.
Entering Orders in PantherExpress – 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-xxxx-xxxx-xxxx-xxxx-xxxx-xxxx-xxxx. 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.

Note: Please be sure to use proper subcodes. For a listing of Subcodes please go to: http://www.cfo.pitt.edu/prism/, Subcode Listings. Capital assets are defined as items (usually equipment or furniture) that have an acquisition cost of at least $5000 per unit, have an estimated life of at least two years, and are bought through a capital subcode (6100-6199). For example, a microscope for $6,000 is capital equipment, but three computers totaling $6,000 ($2,000 each), are not capital equipment.

11. Click Save button to return to the requisition.
12. Review the requisition and then click

13. A confirmation screen will display.

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

15. Notice the status of the requisition.

   - The status is *Completed* since the order is within your approval limits.
   - A PO number is generated once a requisition is approved; all PantherExpress purchase orders begin with E (if the supplier invoices electronically), or P (if the supplier invoices via a paper invoice).
   - Upon Approval, the order is automatically transmitted to the supplier via an electronic faxing process.
Assign Cart Function

In addition to Submitting a Requisition, you can assign a requisition to another person for account number entry.

- Click on Assign Cart

- Search and Select the person you want to assign the cart to, enter a note, and click Assign
**Entering Orders in PantherExpress – Catalog Items**

- The recipient can find the cart by clicking on *Action Items, Carts Assigned to Me, Drafts Assigned to Me*.

- Click on the Cart name to open it, then click on *Proceed to Checkout*.

- Enter the appropriate charge account and click *Submit Requisition*, or *Assign Cart* to send the cart back to the original preparer before cart submission.

- The requisition will forward to the approver of whoever submits the cart.
**Entering Orders – Split Accounting Code Distributions**

**Split Accounting Code Distributions**

- A PantherExpress order can have one or multiple account code 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
- To split charges for individual line items, you must first click on the Accounting Codes button in the workflow diagram, 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 *Edit* in the Accounting Codes assignment area.
Entering Orders – Split Accounting Code Distributions

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.

PantherExpress
N → Home/Shop

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 Add to 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 – Split Accounting Code Distributions**

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 \[1,305.40 USD\] then on View My Cart.

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 – Split Accounting Code Distributions**

**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.

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

   - Click on the Save button.
Enter Orders – Split Accounting Code Distributions

Split Distribution for a single line item

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

15. Scroll down to the 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 – Split Accounting Code Distributions**

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

   - 04.49010.6020.22950.000000.000000.0000

**Note:**
- As many splits as needed can be added. Splits can be applied to line items in one of three ways;
  - % of Price
  - % 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 – Split Accounting Code Distributions**

23. Choose to split the line by *Percentage of Price* from the drop down.
   - Enter 80 for the first account number.
   - Enter 20 for the second account number.
   - Click on **recompute / invalidate 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
   - 05.49010.6020.00000.02691.00000.0000

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 Quick View.

33. Notice in the General Section

- The order is pending approval
- A PO # has not been generated yet
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. These screens are also available from a company called Lerro, so filter your search results so you are only viewing screens from Smart Solutions Technology.
   - 1 motorized projection screen, 96” x 96” (cat.# Access E 104006)
   - 2 motorized projection screens, 79” x 140” (cat.# Access E 104023)

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. Search for the first projection screen by the Catalog #.

3. Filter results so you are only viewing screens from Smart Solutions Technology.
Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

4. Enter the correct Quantity and click Add to Cart

5. Find the second screen, filter by Supplier, enter Quantity, and click Add to Cart
Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

6. Review your order by clicking on $5,065.81 USD, then on View My Cart.

7. Enter a descriptive cart name, click Update to save, and then click on the Proceed to Checkout button.

8. Click on the edit button in the Accounting Codes section.
Lab 2 Solutions: Enter an Order for a Catalog Item; Split Charges for Total Cost of Order

9. Click on the Add Split button.

- The screen will split into two separate account codes.
- You can split multiple ways, e.g.,
  - % of Price
  - Amount of Price

10. Add this split by % 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 \texttt{Save}.

11. Click on \texttt{Final Review} to review the order.

12. Click \texttt{Submit Requisition}.
**Entering Orders in PantherExpress — Quick Orders**

Enter an order using the PantherExpress Quick Order screen. This will allow users to search for and add multiple items to their carts at once by entering in product catalog numbers for each item.

1. Navigate to the *Quick Order* screen.

   PantherExpress
   
   N → Home/Shop → Quick Order
   
   - Notice that you can enter up to five (5) items at a time.
Entering Orders in PantherExpress – Quick Orders

2. Enter the following product numbers exactly as they appear below.

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

3. Click on Add to Active Cart..

- 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 found. It is either not a valid catalog number, or the item is not pre-loaded.

4. Click on the shopping cart icon to complete the order.
Entering Orders in PantherExpress – Quick Orders

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 to 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 02.49010.6000.22950.000000.0000.
   - This is not a valid account number, so the system will return this order to Draft Carts. In the Draft Carts module, you will learn how to resubmit a returned order.

10. Submit the requisition.
**Entering Orders in PantherExpress – Punchouts**

**Punchout Suppliers**

- Punchout suppliers provide a customized University of Pittsburgh website for searching for products.
- Punchout sessions will expire after 30 minutes, even if you are active on the punchout site. The only way to avoid timing out and losing your cart, is to click the Reset Session button. (Note: Perkin Elmer has its own timeout period, 20 to 25 minutes, built into its punchout site. The Reset Session button has no effect on this timeout; your session will expire whether or not you click on Time-out.)
- Fisher Scientific, Dell, and Franklin Interiors allow you to access your quotes from their punchout sites. See the “Did you Know? Series” on the Training section of the PantherExpress website for instructions on accessing your quotes.
- The Favorites function on the PantherExpress system home page is meant for catalog items only. Favorite Lists for punchout suppliers are created on their punchout site.

Create an order for blue gel pens, brown envelopes, and printer toner. Search on the SUPRA office supplies site. The order will be within your approval limits.

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**PantherExpress**

N → Home/Shop

1. Click on the SUPRA punchout link.

   - The Punchout will automatically load to the webpage.
   - Each Punchout will have different navigation through its 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 PantherExpress.
Entering Orders in PantherExpress – Punchouts

2. There are multiple ways to search for products.
   - Search by Keyword or Item # in the search field at the top of the page
   - Enter Item Number & Quantity in the Quick Order fields
   - Browse pre-populated product categories and lists

3. Search for blue gel pens
   - Enter “blue gel pens” in the Search field at the top of the screen
   - Click on the Search icon
4. When viewing search results on the Supra site, keep in mind the following:
   - There are multiple sort options along the left side of the search results, and in the Sort By dropdown menu.
   - *Best Value* designates a high volume item with a deep discount

5. Enter the quantity to be ordered and click *Add to Cart*
   - For multiple items, enter quantities for each item; you only have to click *Add to Cart* once, for all items to be added to the cart

6. Another way to search for products is by selecting from product categories, or prepopulated Shopping Lists
   - Click on *My Lists*, and then *Manage Lists*
7. Scroll through the Shopping List and click on *Envelopes*
   - Select a brown envelope, enter quantity, and click the checkbox at the end of the line item
   - Scroll to the bottom of the list, and click *Add to Cart*
8. The **Ink and Toner Finder** can help you locate ink and toner cartridges

- Click on **Ink & Toner**
- From the drop-down menus, select a Manufacturer, Product Line, and Model Number.
- The system will find all toner cartridges that fit that particular printer model.

9. Enter Quantity and click **Add to Cart**.
Entering Orders in PantherExpress – Punchouts

10. When you are done searching for products click View Cart

11. You can Continue Shopping or Check Out
   - Click Check Out
Entering Orders in PantherExpress – Punchouts

12. PantherExpress will automatically pull the cart, and all its contents back into the PantherExpress system.

13. Enter a Cart Name, and click Proceed to Checkout.

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 PantherExpress – Punchouts

14. Edit Shipping information, if necessary.

15. Click on the first [edit] button in the Accounting Codes section.

16. Select Entity and Department codes, and add the rest of the account code.
   - 02.49010.6000.00000.000000.00000

17. Click on [Save] button.

18. Review the requisition, then click Submit.

![Requisition Submitted]

**Next Steps**
You can view or print this at: Requisition 69133241, or via the Document Search page

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

**Requisition Summary**

<table>
<thead>
<tr>
<th>Requisition number</th>
<th>69133241 Quick View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition status</td>
<td>Pending</td>
</tr>
<tr>
<td>Cart name</td>
<td>office supplies</td>
</tr>
<tr>
<td>Requisition date</td>
<td>12/4/2015</td>
</tr>
<tr>
<td>Requisition total</td>
<td>232.72 USD</td>
</tr>
<tr>
<td>Number of line items</td>
<td>2</td>
</tr>
</tbody>
</table>

23. Click on Quick View.

24. What is the status of your order?
Entering Orders in PantherExpress – Punchouts

Shopping Lists

If there are items you will be ordering repetitively they can be added to a Shopping List

1. Click on My Lists, Create New List

2. Give your list a name and click Create New List

3. Click Yes, Set to Default if you would like it to be your default list

4. Click Save Changes
5. To save an item to your Favorites List, after finding the item click *Add to Shopping List*

6. Select your shopping list and the system will confirm the item was successfully saved to the list

7. To purchase items saved to a Shopping List, click on *My Lists*, and select the list name

8. All items saved to the list will display, and can be added to your cart
**Entering Orders in PantherExpress – Radioactive Materials**

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

<table>
<thead>
<tr>
<th>PantherExpress</th>
</tr>
</thead>
<tbody>
<tr>
<td>N → Home/Shop → Punchout → PerkinElmer</td>
</tr>
</tbody>
</table>

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 PantherExpress.

![Image of PantherExpress interface]

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

6. Click the **Update** button to apply changes.

7. Click **Proceed to Checkout**.

8. Click **edit** and update the accounting code.
   - **05.49010.6010.00000.002691.00000**

9. 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.
Helpful Hints

- The Prepared For field in the General section of the Requisition form can be used to record who an order is for, and is a searchable field in the Advanced Search screen.