Working with a Shopper’s Orders

Chapter 7
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 PantherExpress 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 (Account Assigner). 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 PantherExpress as a Shopper. Enter an order for a dry erase board from Garcia Marketing. Enter a second order for a desktop lamp from Supra.

1. Navigate to the Home page.

<table>
<thead>
<tr>
<th>PantherExpress</th>
</tr>
</thead>
<tbody>
<tr>
<td>N → Home Page</td>
</tr>
</tbody>
</table>

2. Click on Logout.

3. Log back into PantherExpress 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 – Supra (Punchout)
     - Desk lamp (#685335)
     - Quantity – 1 @ $109.99

5. Log back into PantherExpress 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”. Click on the link for unassigned requisitions.

7. Click on the folder link for Account Code Assignment.

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

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.

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 either folder. (Note: If My PR Approvals folder does not display, click on My Approvals, My Approvals, My PR Approvals)
Working with a Shopper’s Orders – Account Code Assignment

13. Click on the *Page Icon* next to the requisition number or click on the requisition number 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.

   - 02.49010.6000.00000.000000.00000.00000

16. Click on the **Save**.

17. Click in the *Available Actions* drop down box at the top right corner of your screen.

18. Select *Approve/Complete Step*.

   ![Available Actions: Approve/Complete Step](image)

   Or select *Approve/Complete & Show Next*.

   ![Available Actions: Approve/Complete & Show Next](image)

19. Click the **Go**.
Working with a Shopper’s Orders – Account Code Assignment

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. Click the Requisitions link under Unassigned Approvals. 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.

   ![Image of order selection](image)

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

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 (My PR Approvals folder).
   - Lamp from Supra ($109.99)
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 Go.