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 Shoppers’ 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.

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.
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.

   ![Unassigned Approvals](image)

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

   ![Account Code Assignment](image)

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

   ![Requisitions List](image)

9. Select the two requisitions you created by clicking on the check boxes at the end of each row.
**Working with Shoppers’ 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 Shoppers’ 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.
   • 02.49010.6000.00000.00000.00000.00000

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.

   Available Actions: Approve/Complete Step  
   Go

   Or select Approve/Complete & Show Next.

   Available Actions: Approve/Complete & Show Next  
   Go

19. Click 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. 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.

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 Shoppers’ 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 [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/Complete Step*, and click [Go].