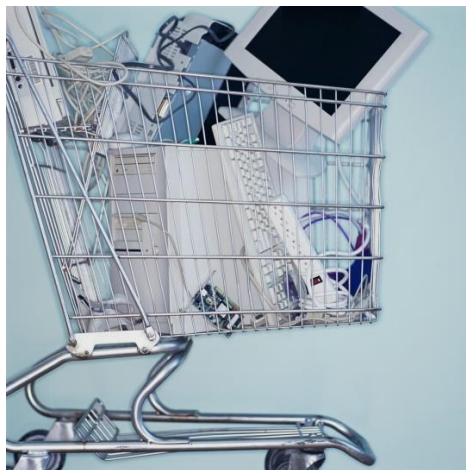


# *Working with a Shopper's Orders*

## *Chapter 7*



## ***Working with a Shopper's Orders***

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### **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***

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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.

PantherExpress

N → 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.

## Working with Shoppers' 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.

The screenshot shows the 'Action Items' section. Under 'My Assigned Approvals', there is a link for 'Requisitions To Approve' with a red badge containing the number '1'. Below this, under 'Unassigned Approvals', there are two links: 'Unassigned Requisitions Needing Approval' with a red badge containing '1', and 'Unassigned Invoices Needing Approval' with a red badge containing '3'. The 'Unassigned Approvals' section is highlighted with a red border.

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

The screenshot shows a search results page. At the top, it says 'Total Results Found: 415'. Below that, there are search filters for 'All Dates' and 'Assign'. The results are sorted by 'Submit date newest first'. There are two folder links: 'Dent Med-Office of the Dean (Account Code Assignment) [409 results]' and 'Department: 49010 (Dental Med - Dean's Office): (0.00 - 500.00) USD [6 results]'. An arrow points to the first folder link.

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

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
69239130	Supra Office Solutions	Not Assigned	12/8/2015 3:50 PM	Shopper Shopper2	109.99 USD	Assign
69238967	Garcia Marketing Inc.	Not Assigned	12/8/2015 3:48 PM	Shopper Shopper2	184.06 USD	Assign

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*.

Total Results Found: 425 All Dates Assign Go

Sort by: [Submit date newest first] Results per folder: 20

Show requisition details expand all collapse all

**Dent Med-Office of the Dean (Account Code Assignment) [419 results]** Page 1 of 21

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
<a href="#">69239130</a>	Supra Office Solutions	Not Assigned	12/8/2015 3:50 PM	Shopper Shopper2	109.99 USD	<span style="border: 1px solid black; padding: 2px;">Assign</span> <input checked="" type="checkbox"/>
<a href="#">69238967</a>	Garcia Marketing Inc.	Not Assigned	12/8/2015 3:48 PM	Shopper Shopper2	184.06 USD	<span style="border: 1px solid black; padding: 2px;">Assign</span> <input checked="" type="checkbox"/>


11. Click on Go.

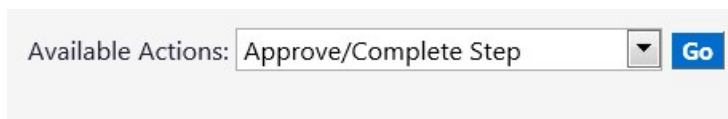
12. Your login name will now display as the Approver, and copies of the requisitions are placed in the *My PR Approvals* folder. You can take action on the requisitions from either folder. (Note: If My PR Approvals folder does not display, click on *My Approvals*, *My Approvals*, *My PR Approvals*)


**My PR Approvals [3 results]**

Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
<a href="#">69239130</a>	Supra Office Solutions	Department Buyer2	12/8/2015 3:50 PM	Shopper Shopper2	109.99 USD	<span style="border: 1px solid black; padding: 2px;">Approve</span> <input type="checkbox"/>
<a href="#">69238967</a>	Garcia Marketing Inc.	Department Buyer2	12/8/2015 3:48 PM	Shopper Shopper2	184.06 USD	<span style="border: 1px solid black; padding: 2px;">Approve</span> <input type="checkbox"/>
<a href="#">48332499</a>	Garcia Marketing Inc.	Department Buyer2	3/25/2014 8:49 AM	Shopper Shopper2	22.80 USD	<span style="border: 1px solid black; padding: 2px;">Approve</span> <input type="checkbox"/>

## **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.
  - 02.49010.6000.00000.000000.000000.000000
16. Click on .
17. Click in the *Available Actions* drop down box at the top right corner of your screen.
18. Select *Approve/Complete Step*.



Available Actions:   

Or select *Approve/Complete & Show Next*.



Available Actions:   

19. Click .

## Working with Shoppers' Orders – Account Code Assignment

The screenshot shows a dashboard titled "Action Items" with a dark brown header. Below the header, there are three sections, each with a red border:

- My Assigned Approvals**: A light gray header section containing one item: "Requisitions To Approve" with a red square icon containing the number "1".
- Unassigned Approvals**: A light gray header section containing two items: "Unassigned Requisitions Needing Approval" with a red square icon containing the number "1", and "Unassigned Invoices Needing Approval" with a red square icon containing the number "3".

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.


Department: 49010 (Dental Med - Dean's Office): (0.00 - 500.00) USD [7 results]						
Requisition No.	Suppliers:	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
69238967	Garcia Marketing Inc.	Not Assigned	12/8/2015 3:48 PM	Shopper Shopper2	184.06 USD	<a href="#">Assign</a> <input checked="" type="checkbox"/>

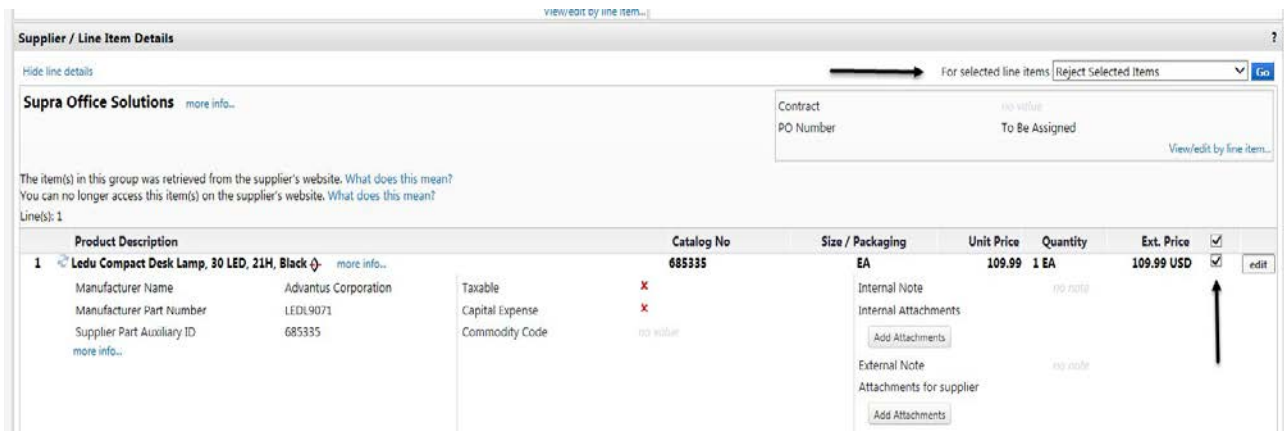
25. Select *Approve/ Complete* from the drop down menu and click on .
26. The order is approved and removed from the Department folder.



## 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 .




Supplier / Line Item Details

Hide line details

Supra Office Solutions [more info...](#)

Contract NO VALUE  
PO Number To Be Assigned  
[View/edit by line item...](#)

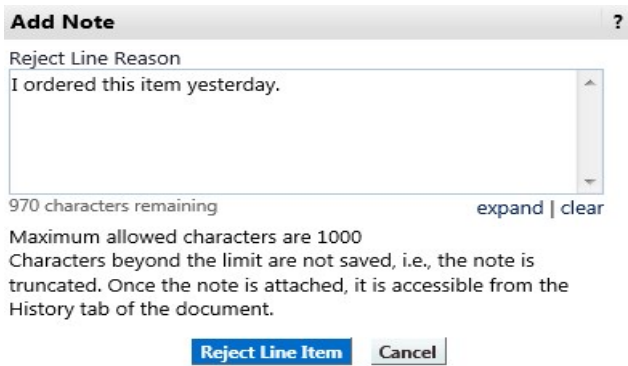
For selected line items: **Reject Selected Items** 

The item(s) in this group was retrieved from the supplier's website. What does this mean?  
You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 <a href="#">Ledu Compact Desk Lamp, 30 LED, 21W, Black</a> <a href="#">more info...</a>	685335	EA	109.99	1 EA	109.99 USD	<input checked="" type="checkbox"/> <a href="#">edit</a>
Manufacturer Name: Advantus Corporation	Taxable: <b>x</b>	Internal Note		<small>NO VALUE</small>		
Manufacturer Part Number: LEDL9071	Capital Expense: <b>x</b>	Internal Attachments				
Supplier Part Auxiliary ID: 685335	Commodity Code: <small>no value</small>	<a href="#">Add Attachments</a>				
<a href="#">more info...</a>		External Note		<small>NO VALUE</small>		
		Attachments for supplier				
		<a href="#">Add Attachments</a>				

32. Enter a reason for rejecting the line item and click on **Reject Line Item**.



**Add Note** ?

Reject Line Reason

I ordered this item yesterday.

970 characters remaining [expand](#) | [clear](#)

Maximum allowed characters are 1000  
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

[Reject Line Item](#) [Cancel](#)

33. Scroll to the top of the screen. From the *Available Actions* drop-down box, choose **Approve/Complete Step**, and click **Go**.