Welcome!

AggieBuy Overview for Window Shoppers

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Welcome to AggieBuy!

- AggieBuy is the UC Davis e-procurement system for ordering supplies and equipment from many university-contracted suppliers:

    - Catalogs include office, laboratory, medical, research, maintenance, and custodial supplies and equipment

    - Current list of AggieBuy suppliers is on our website

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Welcome to AggieBuy!

- Available for all UC Davis employees and affiliates, with the exception of Hospital employees

- Hosted and punch-out catalogs are available

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Logging in to AggieBuy

- Log in with your campus user ID and Kerberos passphrase at
https://aggiebuy.ucdavis.edu

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Different Catalog Types

- **Hosted** catalogs allow searches within AggieBuy itself; great for price and feature comparisons; easy to identify the lowest priced item(s); great if you don't know what supplier sells a particular product

- **Punch-out** catalogs "punch out" to supplier's website; customer shops within website and returns cart to AggieBuy: great for seeing stock availability, configuring items, creating and using e-quotes, and when you want to use a specific supplier

Hosted Catalog Searches

- On the Main Dashboard, in the **Product Search** section, enter your desired search criteria

Punch-Out Catalog Searches

- On the Main Dashboard, in the **Showcases**, **Punch-Out** section, click the tile of the supplier for which you wish to shop:

What is a Window Shopper?

- All active UC Davis employees are assigned **Window Shopper** access

- A **Window Shopper** is an AggieBuy user who can shop hosted and punch-out catalogs, build a shopping cart, but not submit it directly into routing

- A **Window Shopper** assigns their shopping cart to an AggieBuy **Requester** who then completes the order and submits it into routing

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What Does a Window Shopper Need?

- **System Required:**
  - Item(s) you want
  - Name of your Cart Assignee

- **System Optional:**
  - Account Information
  - Capital Asset Information (if purchasing items above $5K)
  - Shipping Information

Identify Cart Assignee at Cart Checkout

- After you have finished building your shopping cart, click on **Assign Cart** button to search and locate Cart Assignee:

Who is My Cart Assignee?

- Contact your supervisor or business office

  - They will let you know the name of the person to whom you should assign your cart

  - Your Cart Assignee should have an AggieBuy **Requester** role

  - The Cart Assignee is the person that submits the cart on your behalf

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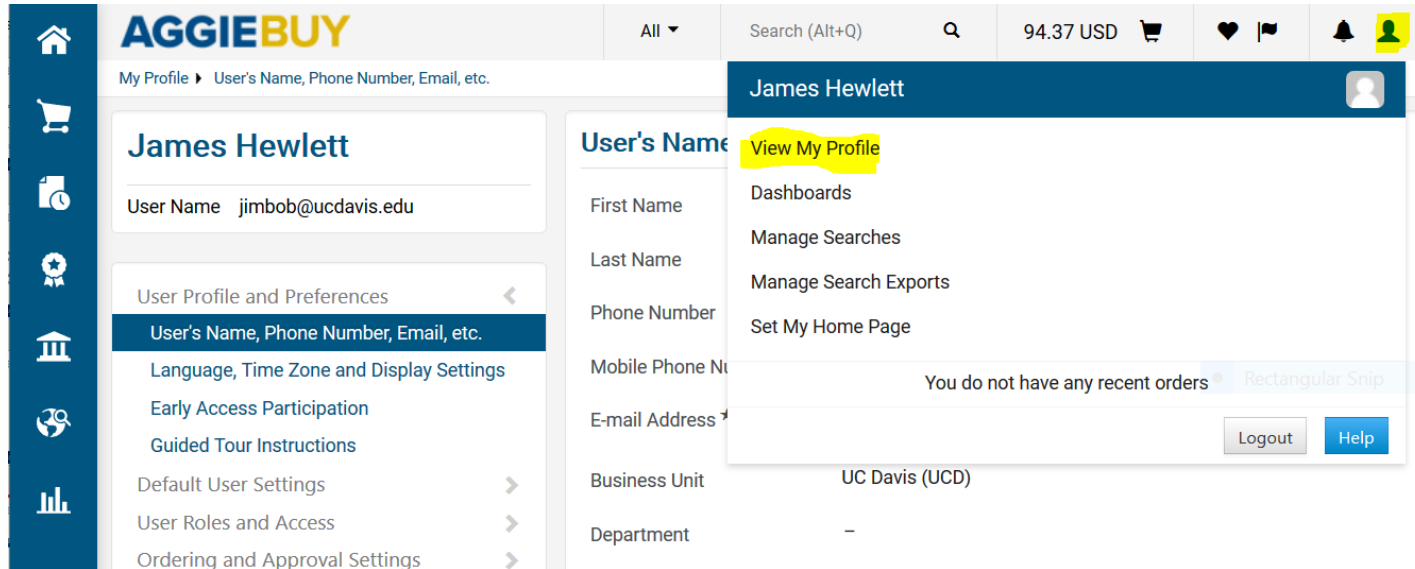# What account(s) should I use?

- Contact your supervisor or business office

    - They will let you know if you should enter account information directly or if they prefer that your Cart Assignee do this for you

    - They will also let you know if you should enter any Capital Asset information for items over $5K, or if the Cart Assignee will do this as well

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Set Defaults in Your User Profile

- You can save your cart assignee names, accounts, and delivery addresses as part of your profile

- You can then select them or enter different one(s) as necessary each time you build a shopping cart

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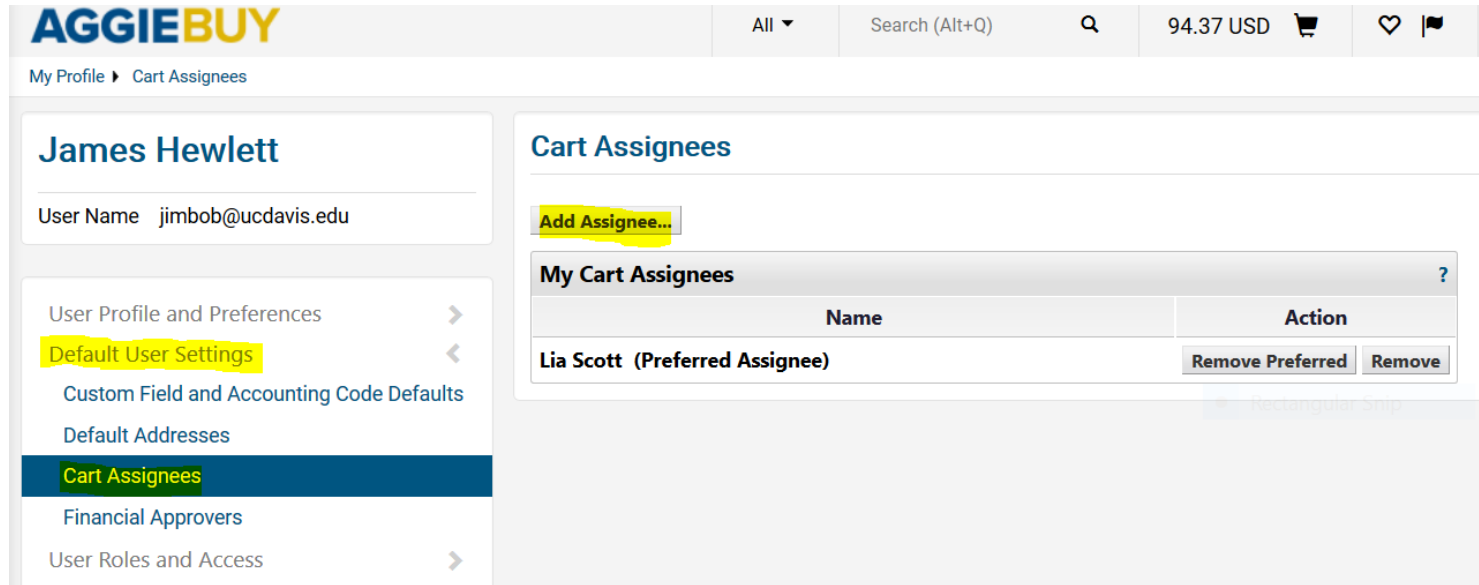
Set Defaults in Your User Profile

- Click on the person icon in the upper right corner and select **View My Profile.**

Set Default Cart Assignee(s)

- On the left, click on **Default User Settings**, and select **Cart Assignees**

Set Default Delivery Address(es)
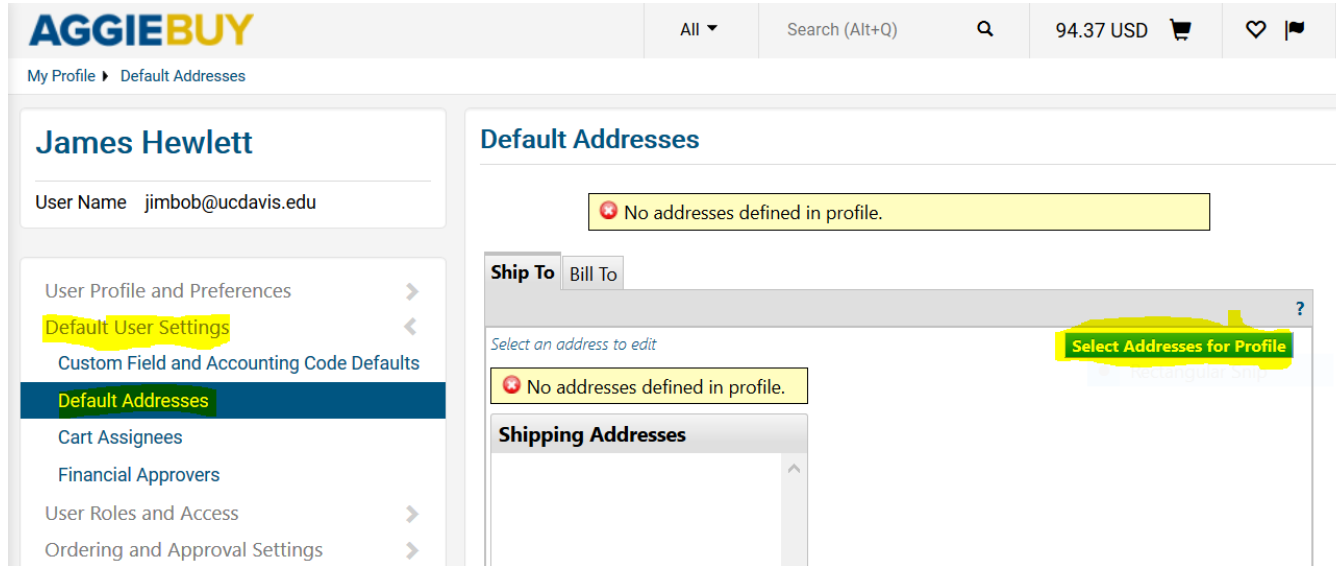
- On the left, click on **Default User Settings**, and select **Default Addresses**

Set Default Account(s)

- On the left, click on **Default User Settings**, and select **Custom Field and Accounting Code Defaults**

AggieBuy General Workflow

- **Window Shopper** shops AggieBuy catalogs and builds their cart

- **Window Shopper** assigns Requisition to Cart Assignee (**Requester)**

- **Requester** submits Requisition; **Fiscal Officer/Account Delegate** approves it

- **Purchase Order** is created in AggieBuy and exported to supplier(s)

- Item(s) are shipped and supplier invoices for order; payment is automatically issued to pay the supplier

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Viewing Purchase Orders

On left menu:
1. Click the **Documents** icon, then
2. Select **My Orders**, and then
3. Select **Purchase Orders** to see the Purchase Orders created from your AggieBuy Requisitions.
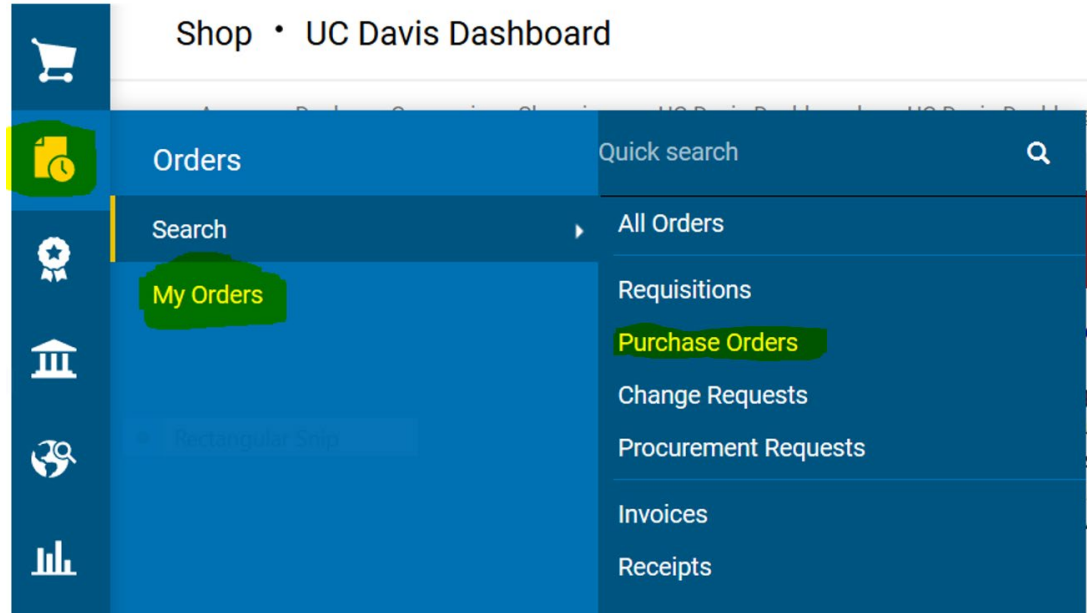
Viewing Purchase Orders

- AggieBuy Purchase Orders begin with the **UCDAB** prefix; the AggieBuy Requisition number is also included in the results:

	PO Number ▼	Supplier	Created Date/Time ⬇	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount ▼
⋯	UCDAB002842T	HD Supply Facilities Maintenance ⓘ	6/4/2021 1:37:12 PM	Completed	3276140	Requester UC Davis	Sent To Supplier	Partially Matched	92.66 USD
⋯	UCDAB002841T	HD Supply Facilities Maintenance ⓘ	6/4/2021 1:26:16 PM	Completed	3276134	Requester UC Davis	Sent To Supplier	Fully Matched	92.66 USD
⋯	UCDAB002840T	HD Supply Facilities Maintenance ⓘ	6/4/2021 12:56:09 PM	Completed	3276041	Requester UC Davis	Sent To Supplier	Partially Matched	92.66 USD

Indicating Receipt of Items (Optional)

- Locate the Purchase Order for which you want to document receipt, open it, click on the **Receipts** link, click the **+** icon, and under **Document Actions**, select **Create Receipt**.

Don't See Your Purchase Order?

On AggieBuy left menu:

1. Click the **Documents** icon ,then
2. Select **My Orders**, and then
3. Select **My Requisitions** to see the Purchase Orders created from your AggieBuy Requisitions.

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Don't See Purchase Order?

- In search results, you will see Requisitions that are **Completed** or **Pending** approval; click on the Requisition number to see who still needs to approve pending Reqs.

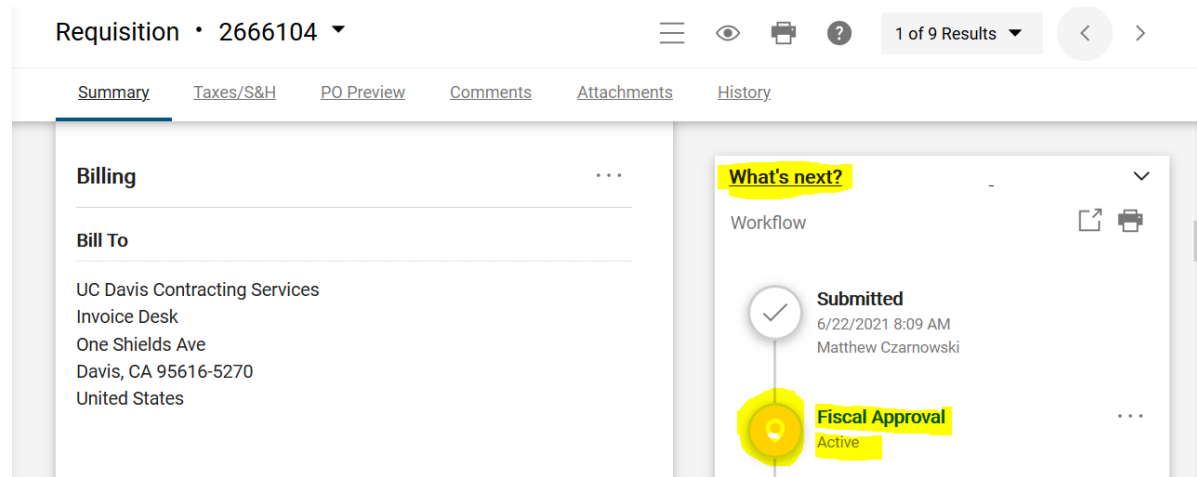|	Requisition Number ▼	Supplier	Requisition Name	Requisition Status ▼	Prepared For	Submitted Date ⊙	Total Amount ▼
☐	2666104	Fisher Scientific Company LLC ⓘ	Test TASKID	Pending	Matthew Czarnowski	6/22/2021 8:09:27 AM	131.92 USD

Don't See Purchase Order?

- On Requisition, click on **What's Next?** on right menu to see who needs to approve.

AggieBuy Troubleshooting

- **Item(s) Haven't Arrived?**

    - Check **Document Search** section to ensure Purchase Order has been created

    - If Purchase Order has been issued to supplier, check **Supplier Shipping** schedules

    - Contact Supplier

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AggieBuy Troubleshooting

- **Need to Return an Item?**

    - Check the information on the email confirmation for return instructions

    - Contact [Supplier](#)

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AggieBuy Troubleshooting

- **Other Issues?**

  - Check with your supervisor or business office; they may be able to provide additional guidance or instructions

  - The **AggieBuy Help Desk** at ab-help@ucdavis.edu can also be a helpful resource

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