Welcome!

AggieBuy Overview for Window Shoppers
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
Welcome to AggieBuy!

- Available for all UC Davis employees and affiliates, with the exception of Hospital employees
- Hosted and punch-out catalogs are available
Logging in to AggieBuy

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

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Supplier</th>
<th>Created Date/Time</th>
<th>PO Status</th>
<th>Requisition Number</th>
<th>PO Owner</th>
<th>Shipment Status</th>
<th>Matching Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>UCDAB002842T</td>
<td>HD Supply Facilities Maintenance</td>
<td>6/4/2021 1:37:12 PM</td>
<td>Completed</td>
<td>3276140</td>
<td>Requester UC Davis</td>
<td>Sent To Supplier</td>
<td>Partially Matched</td>
<td>92.66 USD</td>
</tr>
<tr>
<td>UCDAB002841T</td>
<td>HD Supply Facilities Maintenance</td>
<td>6/4/2021 1:26:16 PM</td>
<td>Completed</td>
<td>3276134</td>
<td>Requester UC Davis</td>
<td>Sent To Supplier</td>
<td>Fully Matched</td>
<td>92.66 USD</td>
</tr>
</tbody>
</table>
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.
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.
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
AggieBuy Troubleshooting

- **Need to Return an Item?**
  - Check the information on the email confirmation for return instructions
  - Contact [Supplier](mailto:supplier@example.com)
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