The Next Generation of E-Procurement at UC Davis!
Overview for Window Shoppers
Welcome to AggieBuy!

• AggieBuy is the UC Davis e-procurement system for ordering items from many of our 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!

- AggieBuy is the UC Davis e-procurement system for ordering items from many of our university-contracted suppliers:
  - Available for all UC Davis employees and affiliates, with the exception of Hospital employees
  - Hosted and punch-out catalogs are available
Shopping with Hosted and Punch-Out Catalogs

- **Punch-out** catalogs “punch out” to vendor’s website; user shops within website and returns cart to AggieBuy: great for seeing stock availability, configuring items, and for creating and using e-quotes.

- **Hosted** catalogs allow searches within AggieBuy itself; great for price and feature comparisons; easier to identify the lowest priced item(s).
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 Info 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
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 your name in 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 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 Requisitions and Purchase Orders

• In **Document Search** section at bottom of home page, click on **My Requisitions** to see the shopping cart information and **My Purchase Orders** to see the POs issued as a result of your approved shopping carts:
Indicating Receipt of Items (Optional)

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

• Item(s) Haven’t Arrived?

  • Check the My Requisitions link in the Document Search section to ensure all approvals have been secured

  • 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
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
System Tour
Thank you for your time today!