AggieBuy Current Issues!

Setting up Defaults, “Changes”, and Post Ordering

UC DAVIS SUPPLY CHAIN MANAGEMENT
Setting Up Defaults

- Default addresses and accounts can be set up within your profile in AggieBuy. Default addresses can also be set up within your requisition upon check out.

- Note: Department and phone number profile information is pulled from the UC Davis campus directory and can be updated there. Any changes made will usually route for approval. Once approved, the information reflected in AggieBuy will update.
Setting Up Defaults: Account
Setting Up Defaults: Account
Setting Up Defaults: Address (in your profile)
Setting Up Defaults: Address (in your profile)
Setting Up Defaults: Address (in a requisition)
Changes in AggieBuy

- Changes CAN be made to an AggieBuy Requisition while it is in routing (fiscal officer/delegate, other approvers can make edits, or send back to Requester to make changes)

- Once an AggieBuy Purchase Order has been created and exported to the AggieBuy supplier(s), changes generally CANNOT be made
  
  - The ONLY exception is if you contact the Supplier BEFORE they have shipped the items and only want to cancel the order
  
  - If you wish to add NEW or ADDITIONAL quantities to the order, you should create a NEW AggieBuy Requisition for those items
Post Ordering: Order Status

- AggieBuy does *not* receive shipment notifications or order status information. The supplier will have the best information regarding order status.

- As AggieBuy Supplier ships item(s), they electronically invoice against the Purchase Order in AggieBuy. This is the only shipment indication listed in AggieBuy.
  - Payment Request (PREQ) is automatically created in KFS
    - Charges the departmental account(s)
    - Releases the encumbrances
Post Ordering: Managing Open Orders in AggieBuy

- Review list of Open Orders on FIS Decision Support 364 Report (Open Purchasing Orders) or Schedule it to regularly email it to you!
  - The 364 report shows ALL open orders created in KFS and in AggieBuy.

- Or, you can Review list of Partially or Non-Invoiced Orders directly in AggieBuy!
Post Ordering: Managing Open Orders in AggieBuy

- **Check with end users** to see whether or not they have received items on any order(s) indicated as open (Utilizing the Receiving functionality is a good way to confirm if item has been received or not)

- **Contact AggieBuy Suppliers** on orders where invoices have not been generated for received items, or for outstanding orders where no items or invoices have been generated

- If supplier advises that item will soon ship or invoice generated, there is nothing additional you need to do
Post Ordering: Managing Open Orders in AggieBuy

- If (and only if) AggieBuy Supplier indicates that order will not be fulfilled, then you should process the associated Close Purchase Order document in KFS
  - The above should be done only after ensuring that all other items on order have already been received/invoiced
  - Once an order has been closed in KFS, the associated liens/encumbrances will be automatically removed
  - Note, that PO’s without invoicing activity will only have the “void order” button and not a “close order” button. Voiding orders should *only* be done in the event of an order cancellation that has been confirmed by the supplier. If the items missing invoicing were received, the void order button should *not* be implemented. Please reach out to the supplier for invoicing.
Need Additional Help?

- AggieBuy Help Desk: ab-help@ucdavis.edu

- UC Davis Procurement Website: https://supplychain.ucdavis.edu/procure-contract/aggiebuy