



AggieBuy Current Issues!

Setting up Defaults, “Changes”, and Post Ordering

UCDAVIS 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



My Profile > Custom Field and Accounting Code Defaults

KAITLYN MCLANE

KAITLYN MCLANE

User Name krmclane@ucdavis.edu

- User Profile and Preferences >
- Default User Settings v
- Custom Field and Accounting Code Defaults**
- Default Addresses
- Cart Assignees
- Financial Approvers
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

Custom Field and Accounting Code Defaults

Header (int.) Supplier Codes **Code Favorites**

Business Units: UC Davis (UCD)

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Chart of Accounts

Chart-Account	Chart-Account-SubAccount	Project Code
1234		
H-1009308	no value	no value
EVS - MEDICAL CENTER- NON-HOSPITAL		

KAITLYN MCLANE

- View My Profile
- Dashboards [View My Profile](#)
- Set My Home Page
- Logout

You do not have a

Setting Up Defaults: Account

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Custom Field and Accounting Code Defaults

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Chart of Accounts ? X

Nickname Default

Chart-Account	Chart-Account-SubAccount	Project Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	add split
Select from profile values...		Select from all values...	

Save Cancel

Setting Up Defaults: Address (in your profile)



My Profile > Default Addresses

KAITLYN MCLANE

KAITLYN MCLANE

User Name krmclane@ucdavis.edu

- User Profile and Preferences
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Cart Assignees
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Default Addresses

Ship To Bill To

Select an address to edit

Select Addresses for Profile

Shipping Addresses

260 COUSTEAU PL

260 COUSTEAU PL 2

260 COUSTEAU PL 3

Address Search

Nickname / Address

Text

Results Per Page

Search

Addresses Found: 5 Page 1 of 1

Name	Address
<input type="radio"/> 202 COUSTEAU PL	Attn: KAITLYN MCLANE Room/Ste/Floor Dept. 202 COUSTEAU PL DAVIS, CA 95618 United States
<input type="radio"/> 255 COUSTEAU PL	Attn: KAITLYN MCLANE Room/Ste/Floor Dept.

KAITLYN MCLANE

View My Profile

Dashboards

Set My Home Page

Logout

You do not have

Setting Up Defaults: Address (in your profile)

KAITLYN MCLANE

User Name krmclane@ucdavis.edu

- User Profile and Preferences >
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Default Addresses

Ship To Bill To

Select an address to edit [Select Addresses for Profile](#) [Delete Address](#)

Shipping Addresses	Edit Selected Address
260 COUSTEAU PL	Nickname <input type="text" value="260 COUSTEAU PL"/>
260 COUSTEAU PL 2	Default <input type="checkbox"/>
260 COUSTEAU PL 3	Current Default Address 260 COUSTEAU PL
	ADDRESS
	Attn: <input type="text" value="KAITLYN MCLANE"/>
	Room/Ste/Floor <input type="text"/>
	Dept. <input type="text"/>
	Address Line 1 260 COUSTEAU PL
	City DAVIS
	State CA
	Zip Code 95618
	Country United States
	Save

Setting Up Defaults: Address (in a requisition)



Requisition: 108167381
2018-09-10 krmclane@ucdavis.edu 01

Status: Draft
Document Total: 20.41 USD
What's next for my order?

Requisition ▾

- Shipping** ✓
- Payment: Chart of Accounts ✓
- General ✓
- Capital Asset(s) ✓
- Internal Notes and Attachm... ✓
- Supplier Information ✓
- Taxes, Shipping & Handling
- Final Review ✓

PR Approvals
Comments
Attachment Overview
PO Preview

Shipping

Document Actions ▾ History 🖨️ ?

Ship To edit

Shipping address Attn: KAITLYN MCLANE
Room/Ste/Floor

Ship To

? X

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address select from your addresses

select from org addresses

Address Details

Attn:

Room/Ste/Floor

Dept.

Address Line 1 260 COUSTEAU PL

City DAVIS

State CA

Zip Code 95618

Country United States

Save this address for future use

Name this address (e.g. Main St)

Check this box to make this the default address in the future.

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>

