How to Create a Punch-out Catalog Order

**Quick steps:**

1. Click the icon of the Punch-out Catalog you wish to browse. The selected supplier's catalog will automatically open within AggieBuy - a few open a new browser window. *(pg. 2)*
2. Search for item(s) to order *(pg. 3)*
3. Follow the “checkout/submit order” instructions within the punchout. Your order will be automatically downloaded into your AggieBuy Shopping Cart *(pg. 3-5)*
4. Enter the applicable Header Information *(pg. 6-8)*
5. Click “Save” *(pg. 9)*
6. Review items and confirm the supplier’s information *(pg. 9)*
7. Click one of the blue “**Proceed to Checkout**” buttons *(pg. 9)*
8. Check the General and Shipping information *(pg. 10-11)*
   a. Add or update the information as needed
9. Click “**Edit**” in the Accounting Codes section *(pg. 12-13)*
   a. Enter the accounting codes, or edit the codes that defaulted.
   b. Click the blue “**Recalculate and Save**” button in the box below the codes
10. Enter Internal Notes and Attachments, if applicable *(pg. 14)*
11. Enter External Notes and Attachments, if applicable *(pg. 15)*
12. After everything has been entered click “**Submit Order**” *(pg. 16-17)*
We will begin with adding an item to a cart from a punch-out supplier. Many of the punch-out suppliers market products that have optional or configurable requirements. Since Summus Industries, Dell’s HUB partner, sells computers which are configurable we will use Summus as our example.

Go to your Shopping Home page.

If you have not changed your Homepage you can click on the Home icon.

If you have changed the Homepage then click on the Shopping Cart icon, Shopping, Shopping Home.

Click on Summus Industries “Dell HUB Partner” Punch-Out.
There is a countdown timer when you are in a punch-out. When it gets close to 0 click on the "Reset Session" button and the timer will restart.

Click on the "Return to AggieBuy" if you accidentally clicked into the punch-out or if you just wanted to look an item up but do not want to put it into your cart.

If Dell/Summus sent an e-quote you can click on "E-Quotes" link and find your quote then add it to the cart.

Standard computer bundles may be modified by clicking "Customize" or it can be "Added to Cart" as is.

If you chose to customize the computer then you will go through the list picking out what you prefer. As you do this the price will change. Once finished click "Add To Cart".
If you are finished with your order click “Create Order Requisition”.
Each punch-out might have a different phrase. ie. “Add to Cart”, “Add to Basket”, “Add to Requisition”

Select the appropriate “Trade Compliance” and click “Continue”. (Not all punch-outs address Trade Compliance.)
Your Order Requisition is nearly complete. Please review the following details and edit if necessary. Select “Submit Order Requisition” (bottom right) to submit.

Unless you have a separately signed agreement between you and Dell that specifically applies to this order, by clicking on the “Submit Your Order” button, you agree to Dell’s COMMERCIAL TERMS OF SALE (for purchases meant for internal use), or the RESELLER TERMS OF SALE (for purchases meant for resale), as well as Dell’s WARRANTY and applicable SERVICE DESCRIPTIONS. THESE TERMS CONTAIN IMPORTANT INFORMATION ABOUT YOUR RIGHTS AND OBLIGATIONS, INCLUDING LIMITATIONS OF LIABILITY. These terms are hereby fully incorporated into the transaction and are available in hardcopy from Dell upon request.

Purchase Order View

View/Print Cart
- Print Order Summary
- Print Order Details

Order Requisition Date and Time:
February 24, 2014 4:02 PM CST

Submit Order Requisition

Click “Submit Order Requisition”
Because the punch-out sites are maintained by the suppliers the process to check-out will be different for each site. Also, please be aware that you cannot add an item from a punch-out supplier to your favorites list in AggieBuy, but some of the punch-out suppliers allow you to develop a favorites list within their site.

When you complete your order in the punch-out site it will automatically download into your AggieBuy Shopping Cart for completion. REMEMBER ALL PUNCH-OUT ORDERS ARE “REGULAR”!

Depending on your Role your Shopping Cart might look different than the one below. For specific Role Cart view see pages 7-8.

**Required Fields**

**Shopper:** The only field that is **Required** to be filled in by the Shopper is “**Order Category**”.

**Department Allocator:** “**Order Category**”, “**Fund Type**”, “**Ship To**” and “**Bill To**” are **Required** fields if you are a Department Allocator.
Shopper View

- Change the Cart Name to something that makes sense to you or what your department prefers. Ex. YourInitials-Company-Items

- Cart Description/Purpose: Enter in what the item is for or whom it is for. Ex. Chairs for Lab 201

- Order Category is a **required** field for everyone. Click on “Select from all values…” then select either “Regular” or “Confirming – Do Not Distribute”. All Punch-out orders will be Regular. Regular-Supplier will receive a copy of the Purchase Order. Confirming-Do Not Distribute-PO will be created but the supplier will not receive a copy.

- Fund Type is designated by the account number(s) used. Shoppers might not know what the Fund Type is but Department Allocators will know and will select this information. Click on “Select from all values…” and select Federal, Local, or State.

- Report Reference A & B are alpha-numeric and can be used to enter a second set of books number, Project Name, or anything else you would like. What is nice about using these is you can search by them in the Advanced Document Search page.

- Click on the box next to “Pre-Pay & Add” if your department allows the supplier to charge shipping on this particular order, but could not provide an estimate or exact shipping amount. If you receive a quote that shows estimated shipping costs add it as a line item.

- When Pre-Pay & Add is checked FMO will automatically pay what is on the invoice.

**REMEMBER ALL PUNCH-OUT ORDERS ARE “REGULAR”!**
Shopper-Extended View

If you have an order that is less than $10K and you want Procurement Services to bid the item(s) out or otherwise determine a source this box will need to be checked.

Department Allocator View

Enter the AggieBuy Contract Number or, if still valid, the FAMIS Master Order.

Enter in the start and end date if this requisition will be a contract or copier order.

If the requisition is an Emergency or Sole Source you will need to check the appropriate box. The applicable form will need to be filled out and attached in “Internal Notes and Attachments”. The forms are located may be accessed by hovering your mouse over the field name or from: AggieBuy.tamu.edu/forms/

Rush the Pymt Process: Check this box if you need the Payment Process to be rushed. This will not rush the requisition through just the payment. Also, enter into “Internal Notes” the reason the payment needs to be rushed.

If there is a Special Payment Method you will click on “Select from all values…” and choose the correct one. Also, in Internal Notes you will enter the information needed to fulfill the request.

Values:
- Accounting Only
- Enclosure (copy) to accompany Check
- Enclosure (original) to accompany Check
- Foreign Bank Draft
- Manual Check Request
- Overnight Check
- Pick-up Check
- Wire Transfer – Foreign Currency
- Wire Transfer – US Dollar
Once the Header information is entered and you have clicked on Save you can add or fix your items.

When the Header information is filled out and the items look correct click “Proceed to Checkout”.

Be sure to click “Save” before doing anything else.

A few punch-out catalogs will let you go back into the punch-out and fix/add items. If the punch-out will allow this you will see “Modify Items”.
You now see the checkout page. If you did not fill in the required information on the previous page you will see a warning. If you click on the “Required field:….” it will take you to what needs to be filled out.

The “Ship To” information can be defaulted in your Profile (see Profile Settings User Guide page 9) or click “edit” and select another Ship To address. This is not required for Shoppers but is required for Department Allocators.

The “Bill To” address should already be filled in. If it is not click “edit” and choose either “02-TAMU Bill-To” or “02-TAMUG Bill-To” (only customers on the Galveston campus will have the option.)

Bill To

If you have not set your default “Bill To” click on the drop down next to Billing address. Click on “02-TAMU Bill-To” or “02-TAMUG Bill-To”. Then click “Save”. (To set your “Bill To” see Profile Settings User Guide page 11.)
Ship To

1. To find other Ship To addresses click on “click here”.

2. Now click “select from org addresses”.

3. Enter in “02-” followed by your FAMIS 3 digit address code. If you do not know your address code you can enter in your department name or mail stop. Then click “Search”.

4. Locate the address you are looking for and click “select”.

5. The Attn information and Room information can be modified. If you would like to save this address for future use click on the check box next to “Save this address for future use”. Click “Save”.

When you click “Save this address for future use” you will see a check box to make the address the default address. Do Not change the Name of the address.

If your profile has more than one Ship To click on the drop down and choose the one you want to use.

“Attn” and “Room” lines can be changed.
Accounting Codes

[Diagram image]

Will show the current Fiscal Year.

Member ID is the campus code.

Click "Edit" to enter/change the Department and Account Codes.

If your Department Code is not set-up as a default in your Profile you need to either “Select from Profile values…” or “Select from all values…”. You cannot type it in the blank.

If you have multiple Department Codes in your profile click on “Select from profile values…” Then click the dropdown and select the code you need.

To find a Department Code click not in your profile “Select from all values…” enter the 4 to 5 alpha department code preceded by the campus code. Click “Search”.

When the correct Department Code is found click “select”.

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If you have multiple Account Codes in your profile click “Select from profile values…” Then click the dropdown and click the code you need.

To find an Account Code not in your profile click “Select from all values…” and enter the 6 digit account code preceded by the campus code. Click “Search”.

If your Account Code is not set-up as a default in your Profile you need to either “Select from Profile values…” or “Select from all values…”. If you enter in the account code be sure to check the account after you click “Recalculate and Save”.

If you have 10 or fewer accounts a dropdown box will appear allowing you to click on the account number you want.

When the desired Account Code is found click “select”.

When everything is filled in click “Recalculate and Save”. Double check that it saved the information you selected.
Internal Notes and Attachments

Internal Notes are used for:
1. New Supplier information
2. Trade in information
3. Suggested Supplier list
4. Reason for Rushed Payment
5. Information for Special Payment Method
6. Any other notes that are pertinent to the requisition

1. Click “Add Attachment”

2. Click “Select files…”

3. Select one or multiple files. Click the first file then hold the Ctrl key down and choose others. Then click “Open”.

4. Your files will show up and then you click “Save Changes”.

Now you can see the note you entered and the file(s) you attached. To view the attachment, click the file name. The file can also be removed if it incorrect.

Once the attachments are present you can Remove or Move them to the External Attachment side.
External Notes and Attachments

External Notes and Attachments are done the same way as the Internal Notes and Attachments. Just remember this information will be sent to the Supplier. If you received a Quote you will want to attach it under External Notes and Attachments.

External Notes are used for:
1. Special Packaging Instructions
2. Special Contact Information
3. Any other notes pertinent to the Supplier.
4. Written Quotations from suppliers.

Enter in the information and click “Save”. Once you hit Save the information you entered is permanently saved in the document’s history for anyone to view.

1. Click “Add”

2. Click “Select”

3. Select one or multiple files. Click the first file then hold the Ctrl key down and choose others. Then click “Open”.

Now you can see the note you entered and the file(s) you attached. To view the attachment, click the file name. The file can also be removed if it incorrect.

4. Your files will show up and then you click “Save Changes”.

Once the attachments are present you can easily Remove or Move them to Internal Attachments.
After you have everything filled out you can click “Submit Order”.

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After clicking Submit Order you will see the “Congratulations!” page. This lets you know the requisition has been sent to the next step.

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<tr>
<td>Number of line-items</td>
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</tr>
</tbody>
</table>

What would you like to do next? Here are links to some common actions:

- Search for another item
- View order history
- Check the status of an order
- Return to your home page
- Create new draft cart