Shopping – Quick Order

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How to do a Quick Order

Quick steps:
1. Click “quick order” (pg. 1)
2. Enter Part Number or Catalog Number (pg. 2)
3. Click “Add to Active Cart” (pg. 2-3)
4. If more than one Supplier can supply the item, click “Add to Cart” beside the item and Supplier chosen (pg. 3-4)
5. Click “View My Cart” (pg. 4)
6. Enter the applicable Header Information (pg. 5-7)
7. Click “Save” (pg. 8)
8. Check to see if Supplier and product information is correct (pg. 8)
9. Click one of the blue “Proceed to Checkout” buttons (pg. 8)
10. Check the General and Shipping information (pg. 9-10)
   a. Add or update the information as needed
11. Click the “Edit” button in the Accounting Codes section below the Header info (pg. 11-12)
   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
12. Enter Internal Notes and Attachments, if applicable (pg. 13)
13. Enter External Notes and Attachments, if applicable (pg. 14)
14. After everything has been entered click the blue “Submit Order” button (pg. 15)

Quick Order allows users to enter and search for up to five product catalog number(s) and if exact matches are found, the items are automatically added to the cart. The Quick Order feature works with all hosted and some punch-out catalogs.
Enter the part number/catalog number. You can enter more than one at a time.

Click “Add to Active Cart”

If there is only one match the item will be automatically put in your active cart.
If there is more than one match the matched items will be brought up for you to review. If “Order from Supplier” appears without a price that indicates that the item is from a “tier 2” Punch-out Catalog. Click “Order from Supplier” to see the price and place the order.

Enter the part number/catalog number. You can enter more than one at a time.

Click “Add to Active Cart”

For this match click on “Order from Supplier” and it takes you to the item in the punch-out catalog. Notice the price is cheaper than from Promega Corp. Enter our desired quantity and click “Add to Basket”. Follow the check-out prompts for this punch-out catalog.
If you enter more than one number at a time and both items have more that just one match you will see a result like this.

Click “Search” next to the one you want and it will show you the matches. Then you can enter the other number in quick order and look at those matches.

Once you have finished adding your quick order items click on your shopping cart.

Click “View My Cart”.

Depending on your Role your Shopping Cart might look different than the one below. For specific Role Cart view see pages 6-7.

**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.

Here is your cart number. This will become the Requisition number when the cart is submitted.

The cart amount and how many items are in your cart is shown here at the top.
**Shopper View**

<table>
<thead>
<tr>
<th>Cart Name</th>
<th>CAG-Wesco-Megaframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share cart</td>
<td>No user groups available</td>
</tr>
<tr>
<td>Prepared by</td>
<td>Training Allocator15</td>
</tr>
<tr>
<td>Prepared for</td>
<td>Training Allocator15</td>
</tr>
<tr>
<td>Cart Description/Purpose</td>
<td>Megaframe</td>
</tr>
<tr>
<td>Order Category</td>
<td>1 - Regular</td>
</tr>
<tr>
<td>Fund Type</td>
<td>Select from all values…</td>
</tr>
<tr>
<td>Report Reference A</td>
<td>Select from all values…</td>
</tr>
<tr>
<td>Report Reference B</td>
<td>Select from all values…</td>
</tr>
</tbody>
</table>

**Pre-Pay & Add**

- **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”.
  - **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.
- **Quick orders can either be Regular or Confirming. If you mark this as a Confirming Order you will need to attach the Invoice on the next screen under Internal Attachments.**
- **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.**
**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.

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.

**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.

- Quick orders can either be Regular or Confirming. If you mark this as a Confirming Order you will need to attach the Invoice on the next screen under Internal Attachments.

- You can change the quantity by clicking in the blank below “Quantity” and changing the amount.

- If you need to add more items click “Add non-catalog item for this supplier…”
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.)

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

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”.

Click to filter search results

Values Found 1

02-GOLD

02-The Gold Mine

select
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

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.

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”.

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.

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.

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”.

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 easily Remove or Move them to Internal 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.
After you have everything filled out click “Submit Order”.

![Image of an online order form with highlighted submit button]
After clicking Submit Order you will see the “Congratulations!” page. This lets you know the requisition has been sent to the next step.

Requisition Information

Congratulations! You have successfully submitted your request. If you need to view or print a copy, click Quick View or view its status on the Approvals Tab.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

- Requisition number: 51385303
- Requisition status: Pending
- Cart name: CAG-Wesco-Megaframe
- Requisition date: 7/30/2014
- Requisition total: 321.90 USD
- Number of line items: 1

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