eBuy Features and Special Processes
Preferences, Favorites, Delegates, and Carts

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User Settings

Set email Preferences

In order to receive email notifications as carts progress through the approval process and/or to receive notifications when carts are assigned to them, Users need to set their email preferences accordingly.

To set email preferences click on View My Profile under your name in the upper right. Then click on Email Preferences under User Information and Settings. Click the box next to each notification that is desired then click Save. These preferences can be changed at any time.
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Action Items and Notifications
In the upper right corner of the screen it will show info on your recent carts, action items, and notifications.

Click the red box to see the message.

At any time you need help, click the for a pop-up screen for all topics. You can also click the in bottom left to search the menu if you get lost.

Personalize Carts

Change Cart Name and Description
Shoppers may find it helpful to rename shopping carts in order to facilitate searching for them later. Any naming convention can be used. Typical components are Cart Date, Supplier, Shopper, and Cart #.
To rename a cart click in the Cart Name field, delete the system assigned name, enter the new name. Add a description if you like and click Save.

Set an eBuy Favorites

Set Favorites in a Punchout Catalog
Most Punchout catalogs have functionality that allows Shoppers to set personal Favorites or Shopping Lists within their sites. The OfficeMax functionality is shown as an example. Documentation for other Punchout sites are available on the eBuy Training page under the Supplier Catalog section.

To set up a Shopping List in the OfficeMax catalog click on Manage Shopping Lists in the sidebar on the OfficeMax punchout web site.
Enter a name for your list in the **List Name** field. Add a Category and sort criteria. Click Continue.

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**Create New Shopping List**

- **List Name**: My Office Supplies
- **List Type**: Personal
- **Account**: 0439418 - University of Iowa - Special Pricing
- **Add Category**: Desk Supplies

Categories are used to organize your shopping list. More can be added later.

**Sort Items within categories by**: [Examples]
- Abbreviated Description
- Full Description
- Product Code
- Customer Item #
- Entry Sequence

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**Shop by Category, make a selection, and Add to Shopping List**

**Order by Item #**

- **Appliances & Accessories**: Art and Drafting (645)
- **Blenders & Filing**: Bags and Cases (540)
- **Breakroom Supplies**: Book and Reference (189)
- **Calendars & Organizers**: Cash Handling and Bank Supplies (222)
- **Cleaning Chemicals**: Cubboards (83)
- **Cleaning Supplies & Equipment**: Clips and Fasteners (250)
- **Computer Accessories & Supplies**: Copy Holders (34)
- **Computer Hardware & Peripherals**: Desk Accessories (722)

**Officemax - Two-Tone Mesh Collection - Drawer Organizer - Black, 14-15/16'' x 11-13/16'' x 2-3/8''**

**Customer Item #:** K0096839

**Unit:** EA

**Your Price:** $9.70

**Add to Shopping List**

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**Edit - My Office Supplies**

- **1 Item was added to this list**
- **Account**: 0439418 - University of Iowa - Special Pricing
- **Items Sorted By**: Entry Sequence
- **Modified On**: 10/08/2013 03:37 PM

Add items to the list as desired.
To access shopping lists that have previously been set up click on the **Shopping Lists** tab, then on the list you wish to view.

<table>
<thead>
<tr>
<th>Order By Item #</th>
<th>Shopping Lists</th>
<th>Ink &amp; Toner Finder</th>
</tr>
</thead>
</table>

### Shopping Lists

<table>
<thead>
<tr>
<th>List Name</th>
<th>Date Last Changed</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>SU of I - Binders and Folders</td>
<td>06/10/2010</td>
<td>Shared</td>
</tr>
<tr>
<td>SU of I - Computer Items and</td>
<td>05/31/2013</td>
<td>Shared</td>
</tr>
<tr>
<td>SU of I - Furniture and</td>
<td>09/09/2010</td>
<td>Shared</td>
</tr>
<tr>
<td>My Office Supplies</td>
<td>10/08/2013</td>
<td>Personal</td>
</tr>
</tbody>
</table>

### Set Favorites in eBuy (Hosted Catalog)

Shoppers can set personal Favorites on the eBuy web site for Hosted catalog items. Click on **add favorite** under the **Add to Cart** button of the Hosted Catalog.

A pop-up window will display to create a new, personal or shared folder. Click the **New** button.

Enter a Name and Description, then click **Save**.

Click **Submit**. Product has been successfully added to Favorites.
To access your favorites, click the Shopping Cart, then View Favorites.

Assign Carts

Set Profile Values

Each department has Requesters and Initiators that their Shoppers will be required to send shopping carts to for approval. Shoppers should set the designated Initiator or Initiators as profile values. This will allow them to select their Initiator from a drop down list rather than having to search each time and will eliminate the possibility of a cart being assigned inadvertently to the incorrect Initiator.

After finalizing the cart and clicking on Assign Cart, the box shown below will be displayed. To set a specific initiator as a profile value, click on Search for an assignee.

Enter the identifying information for the appropriate Initiator. At a minimum enter the person’s Last Name. Click Search.

Click Select.
Click **Add to Profile**, then the **Assign** button.

In the future the Initiator can be selected by clicking on **Select from profile values**. A drop down box will display. Click on the down arrow. The Initiator can then be selected from a list of previously selected values.

Or under **My Profile-User Information and Setting**, click **Cart Assignees**

...and set Assignee as **Preferred**.

This Assignee will become your default.

Assignees may also be deleted by clicking **Remove**.
Set Delegates

When Initiators/Requesters plan to be out of the office, they should set a Delegate to receive and approve the shopping carts that are assigned to them in their absence. If a Delegate is not assigned, their carts will be inaccessible to other Initiators/Requesters who might be able to approve them. Delegates can be set for a short period of time (an afternoon, for example) or for an extended period of days, weeks, or months.

First, navigate to My Carts and Orders > View Draft Shopping Carts Click Assign Delegate

Search for your Delegate and Select.

Current Substitute: Christine L Leichly  End Substitution

Substitute is set. Just click End Substitution to unassign.

Note: A user must be set up as an Initiator or Requester in PReqs before they can be set as a Delegate.

To add a new Initiator or Requester, click on the link to PReqs Access Form on the blue sidebar in the PReqs system, complete the form, and click on Send to Workflow.
Compare Items

When using the eBuy product search, users can elect to view similar products in a side by side comparison.

*Note: Search results will include items from both Hosted catalogs and Punchout catalogs from suppliers who support searches in this field.*

On the Home Shopping page, main search, select Lab Supplies and type **flowcell**. Click **Go**.

Click **compare** from the list displayed you wish to view.

Then, at the top of the list, click **Compare Selected**

The comparison is displayed. Click the checkboxes for the items you wish, and click **Go** to add to the active cart.

If no items from the Comparison were selected for a cart, click **<< Back to Search Results** to return to the product search. If items were selected from a Punchout supplier, you will be required to punchout to order. If items were selected from a Hosted supplier, they will be added to your cart and proceed by placing order or assigning cart.

Working with Carts

Un-assigning a Cart

Shoppers may at times need to retrieve shopping carts after they have been assigned to an Initiator/Requester. In eBuy this retrieval process is called “Unassign”. This may occur when an Initiator is out of the office and has not set a Delegate or when the Shopper needs to make a change to the cart.

*Note: A Shopper cannot unassign a cart once the Initiator/Requester has approved it and sent it to PReqs. However, if a PReq has not yet been created, the Initiator may click on Edit/View eBuy Shopping Cart in PReqs to return to the cart in the eBuy system. At that point the Shopper can retrieve the cart by unassigning it.*
To unassign a cart, navigate to View Draft Shopping Carts

Locate the My Drafts Assigned to Others section and click the Unassign button next to the cart that is to be retrieved.

The cart will be returned to the Shopper. It can be edited at this point, if desired, and then re-assigned to the same, or a different, Initiator.

**Delete a Cart in eBuy**

A Shopper can only delete a cart in eBuy when it is in Draft status. At any point in the cart creation process, and prior to assigning the cart, the Shopper can save the cart as a Draft. They then have the option to return later to complete and assign the cart or to delete the cart if they choose to do so.

If a cart needs to be deleted after being assigned, the Shopper must retrieve the cart by unassigning it. See previous section. An Initiator/Requester can delete a cart that has been assigned to them prior to clicking Place Order and sending the cart to PReqs. Once the cart has gone to the PReq system it cannot be deleted. Instead the Initiator must Submit the cart and then Void the resulting PReq.

Navigate to View Draft Shopping Carts and the My Drafts section. Click the Delete button next to the cart that is to be deleted. **Caution: Once the Delete button has been clicked, the cart cannot be reactivated.**
Copy a Cart

In eBuy it is possible to quickly reorder items by copying a previous cart to a new cart. Please note, however, that this functionality is not supported by all suppliers.

Open the View My Orders, either Last 90 Days or Last 5 Orders

Click the cart number you wish to copy.

When the cart is displayed, under Available Actions, select Copy to New Cart and click Go.

The items from the selected cart will be copied to a new cart. The new cart can be edited as needed, renamed, Internal Notes added, and assigned to the Initiator. Shoppers are cautioned that pricing may have changed since the original cart was created or require to punchout to reorder. They should always verify current pricing, and edit it as needed, before assigning the copied cart.
**Move Items from One Cart to Another**

eBuy also allows a Shopper to move selected items to a new cart without copying the entire previous cart. Search for, and select, the cart containing the item(s) to be copied following the procedure described in the previous section.

Click the select box next to the item(s) to be moved. Select **Move to Another Cart** in the drop down menu and click **Go**.

eBuy will verify the cart you wish to move the items to.

The items from the selected cart will be moved to a new cart or a cart specified. It can be edited as needed, renamed, Internal Notes added, and assigned to the Initiator.

**Remove Items from a Cart**

Items can be removed from draft shopping carts either individually or all at once and works the same way as moving items.
Search Orders and Documents

Search for all documents that the user has access to according to user profile permissions and document access permissions. Users can perform a simple search by looking for exact document numbers, partial document numbers and other keywords explained below.

Order and Document search provides a way to search for documents as well as the ability to search across multiple documents. eBuy Requisitions and Purchase Orders can be searched using this tool.

Click on Search Documents.

The search box will search for eBuy PReqs and POs with flexible date options.
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Search Option and Features

Advanced Search
Narrow down your search results ahead of time by pre-selecting what you wish to search. Advanced search can also be performed across all documents. Searching by custom fields now include ranges and starts with capabilities. This feature allows you to enter the Document Number, Owner, Supplier, and/or Catalog Number (SKU).

Item and Product information can also be added to your search.
Saving Document Searches

Document searches can be saved and re-run. For example, a user may want to see all of the open POs for his department at the beginning of each week. Searches can be saved using relative date ranges so that the date range doesn’t have to be set every time you run a saved search. Click **Save Search** and give it a name. Saved Searches will display on your Document Search Home page or at the top of the search results page.

After saving a search you can go back and edit the name and description of the search. To edit the parameters that you have saved, you can click the link to run the search and then make your edits and save the search again.

Quick View

Use the quick view icon next to a search results document number. This will contain a next & previous link when accessed via the document search tab. It allows you to scroll through document search results without having to navigate back to the actual results.

My Purchase Orders

Within the document search tab, there is a link for **my purchase orders**. When the “my” option is selected, the user views a list of the last 90 days of eBuy PReqs and Purchase Orders. You will have the ability to modify the dates being searched or filter the data after the information is presented.