AggieBuy Classroom Exercises – Checking Out Cart

Capital Asset Screen

In this exercise, you will learn how to enter Capital Asset information for Requisitions that include a Capital Asset.

1. Navigate to your active Shopping Cart, or create one if you don’t have an active cart.

2. Click on Proceed to Checkout to enter the Requisition screen.

3. In the menu under Requisition on the left, choose Capital Asset(s).

4. Capital Asset information can be entered for the entire Requisition, or for a specific line item. How would you edit the Capital Asset information for the entire requisition? How about for a line item? What piece of information can be added for an entire requisition but not a line item?

Research Equipment Indicator

In this exercise, you will learn how to designate an item as qualifying for the Research Equipment sales tax discount.

1. Navigate to your active Shopping Cart, or create one if you don’t have an active cart.

2. Click on Proceed to Checkout to enter the Requisition screen.

3. In the menu under Requisition on the left, choose General.

4. How would you edit the Research Equipment designation for the entire Requisition? How about for a line item?

5. Are there any sections other than General where you can edit the Research Equipment designation for an entire requisition? How about for a line item?
Adding a Note (External vs Internal)

In this exercise, you will learn how to add an External or Internal Note to a Requisition or line item.

External Notes

1. Navigate to your active Shopping Cart, or create one if you don’t have an active cart.

2. Click on Proceed to Checkout to enter the Requisition screen.

3. In the menu under Requisition on the left, choose General, then click edit in the top section.

4. Entries here apply to the entire Requisition. If more than one PO is created, the Note will appear on each PO. How can you see more of a long note that was previously entered? How can you delete a note that was previously entered?

5. In the General section of the Requisition screen, scroll down to a line item and click edit. Enter an External Note. Entries here apply to just the line item. If more than one PO is created, the Note will appear on just the PO containing this line item. Click Save.

6. How can you view a history of all the changes that have been made to External Notes for this Requisition?

Internal Notes

1. Navigate to your active Shopping Cart, or create one if you don’t have an active cart.

2. Click on Proceed to Checkout to enter the Requisition screen.

3. In the menu under Requisition on the left, choose Internal Notes and Attachments, then click edit in the top section. Aside from entering an Internal Note, what else can you do in this section? Internal Notes entered here should relate to the entire Requisition and not to a single line item.

4. Scroll down to a line item and click the edit button. Enter an Internal Note here that relates only to this line item. What kinds of Notes might you enter here?

5. Remember that Internal Notes can only be seen by AggieBuy users, not by Suppliers. Where can you find a list of all the changes that have been made to the Internal Notes fields?
Adding a Comment

In this exercise, you will learn how to add a Comment to a Requisition.

1. Navigate to your active Shopping Cart, or create one if you don’t have an active cart.

2. Click on Proceed to Checkout to enter the Requisition screen.

3. In the menu on the left, choose Comments. How can you see existing Comments for all related documents? How can you add a Comment?

4. In the Add Comment window, type your comment into the box. What else can you do here? How do you save your changes?

5. In the Requisition window, click Place Order. Now choose Comments from the menu on the left and click the Add Comment button.

6. How is this Add Comment window different from the one in the Requisition stage? Type a Comment in the field, but use all caps. Why might this be a good idea? Who would a Requester likely send a Comment to? Who else might use the Comment function once an order has been submitted?

7. How can you view a list of all the Comments related to a Requisition? Is there another way?