Purchasing Training

June 29, 2023

Purchase Requisition

- Start at your shopping home page
- Select "Non–Catalog Item" located at the top ribbon

Purchase Requisition

- Enter your selected vendor or Suggested Supplier. Suggested Supplier is used when you don't know who you will purchase the item/service from – Procurement Services will issue a bid/RFP/RFQ or Informal Quote to determine the supplier

Purchase Requisition

- Product Description – enter what you want to buy. You have a limited space here, so in some cases you need to provide an attachment with the complete description.

- Catalog # – "NA" if you don't have one

- Quantity – enter the number you wish to purchase

- Price Estimate – this is the unit price

- Packaging – select the best UOM for the item

Purchase Requisition

- Click "Save" if you only have one item. If you have multiple items, click "Save and Add Another" until you have entered all items.

- By clicking "Save" your items will go to your cart

Purchase Requisition

- The system will automatically take you back to the shopping home page.
- Click on the "Shopping Cart" in the upper right corner.
- Click "View my Cart"

Purchase Requisition

- Cart Name – This is where you will update the cart Name that makes sense to you.

- Prepared For – if you are doing this for someone – you need to update this field. It will default to your name.

- Cart Description – This can be the same as the Name. I see departments change the name and leave the description blank

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- Software and/or Cloud Services – This is the form the "02" campus needs to complete and submit for approval. This does not apply to TAMUSA

- Order Category – Regular Order, Confirming Order, Payment Request

Order Category

- **Regular Order** – this should be the most common category utilized. This is when you want the purchase order to issue to the vendor.

- **Confirming Order** – this is used rarely. This category will NOT issue a purchase order to the vendor. Example – if you placed an order for a chair for $500.00. The vendor accepted your order via email, but you want to encumber your money. The system will automatically issue the Purchase Order, so you have a document to pay against.

- **Payment Request** – this should be the most rarely used category. This will NOT send a copy of the PO to the vendor. This is used when you need to pay the vendor. Example – Exempt purchase and you have a formal agreement executed and need to make a payment.

Purchase Requisition

- Report Reference A and B – these are free text fields. Some business offices elect to enter data that they search against.

- Route to Procurement Services – if you need the requisition to route to Procurement but the dollar value is below your delegation ($10K) you must select this or the system will issue the purchase order.

Purchase Requisition

- Pre-Pay Add – if you know the vendor will be charging you freight and adding to the invoice, you can check this box.

- Emergency – if you have an emergency purchase, you will check this box and attach the justification in the "internal attachments"

- Sole Source – if a sole source you will check this box and attach the justification in the internal attachments

Purchase Requisition

- Contract Number – if you are purchasing something against a contract – enter the number here – Example – E&I Contract EI00140, TAMUS Master Order C2021-1414

- Start and End Date – typically used with services or leases – enter applicable information

Purchase Requisition

- Select only if they apply to purchase –
  - Do Not Encumber
  - Rush the Pymt Process
  - Special Payment Method
  - Cost Receipt Required
  - IFR (item for resale)
  - Trade-in
  - Create Asset Manually
  - Add to Asset Number

Purchase Requisition

- This is where you can review you line items and make any changes necessary.

- Internal & External Notes can be added per each item.

- Reminder – external vendor can see

Purchase Requisition

- Make sure your total is correct – located right side of screen.

- If all is correct, Select "Proceed to Checkout"

Purchase Requisition

- You will now have a draft requisition and the system has assigned a requisition number. The number is in the upper left corner.

- Second chance to review everything again

- Correct Something – Click on the pencil in the upper right corner of each column, that will allow you to correct anything in that column.

Purchase Requisition

- Ship to – This should automatically default for you, if not you can use the pencil to open that column and select the correct address.

Purchase Requisition

- Account Codes – You will need to input your accounting information

- Internal Notes and Attachments – this is where you will add anything that is in reference with this purchase. Use AggieBuy as your filing cabinet. This way you can find everything in one place.

- Notes – this is where you can communicate to Procurement what you need, provide additional information

- External Notes & Attachments – this is for the vendors to see

Purchase Requisition

- Line items – you will need to review each line item – make sure it is correct. Description should be clear as to what you are ordering.

- Commodity Code – this will need to be entered for each item – click on the pencil within the item details section for each item to bring up the dialog box

Purchase Requisition

- Commodity Code – click on the magnification glass icon to bring up the search box.

- When searching for the commodity, you need to think about the object code as well. These two values are tied together.

- Does this item need to be inventoried? What is the unit price? Is it a consumable?

Purchase Requisition

Purchase Requisition

- Click the "+" mark on your selection and it will populate your field. This will need to be done for each item.

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- Make sure your total is correct

- What's next for my order?
  - This will tell you where you document is and where it will be going.
  - You can click on each desk to find out who is on that desk

Purchase Requisition

TAMUS Specialized Approvals
Future

Special Routing1 - Catch folder for no value

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- If my document is pending at the "TAMUS Specialized Approvals" desk, click on that title and it will provide a list of individuals on that desk. You can reach out to any of them to question the status.

Purchase Requisition

- Upper Ribbon, right under the requisition number.
  - Comments – this is where Procurement will communication with you
  - Attachments – you can see all attachments here – internal and external
  - History – you can see what has happened to this requisition from the beginning
  - Summary – always takes you back to the main screen

Purchase Requisition

- You are ready to submit your requisition – you have doubled checked everything, added your attachments, you have a commodity code for each item and your accounting is correct.

- Click "Submit Order" – upper right corner

Purchase Requisition

- You will submit a purchase requisition for all orders that need to come to Procurement Services
  - Bids
  - RFP's
  - RFQ's
- Procurement will review your request once received and determine if we will issue an RFP or Invitation to Bid

- Procurement will discuss this with you to determine the best solicitation for the project.
- Procurement will communicate with you through the comments
- Procurement will attach all files to the requisition.

Questions????