



Purchasing Training

August 10, 2023

Procurement Services

<http://purchasing.tamu.edu/>

979-845-4570

Purchasing Cooperatives

- The following are purchasing cooperatives that Texas A&M and/or Texas A&M-San Antonio are members.
 - This allows us to utilize their agreements as our procurement process.
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Purchasing Cooperatives

- For purchases that exceed your department delegation (\$25,000.01+) a requisition **MUST** be submitted to Procurement.
- The vendor's quote **MUST** reference the purchasing cooperatives contract number.

Purchasing Cooperatives

- BuyBoard
- Omnia Partners
- Sourcewell
- E&I
- Choice Partners
- Houston-Galveston Area Council
- UT Supply Chain Alliance
- Tips-USA
- Equalis Group
- NASPO

BuyBoard Cooperative

The screenshot shows the BuyBoard website homepage. At the top left is the BuyBoard logo. To its right are navigation links: Home, How to Join, Contact Us, and Member Login. The main banner features a yellow background with the text "hello possibilities" and a vertical stack of icons representing various goods and services. To the right of the banner, it says "Increase your purchasing power, lower administrative costs, and streamline the procurement process" with a "LEARN MORE" button. Below the banner are three columns: "National", "Texas", and "Vendor", each with a brief description and a "Learn More" button. The footer contains contact information, social media icons, and legal notices.

BuyBoard Home How to Join Contact Us Member Login

hello
possibilities

Increase your purchasing power,
lower administrative costs, and
streamline the procurement process

[LEARN MORE](#)

National
Governmental entities outside of Texas join the National Purchasing Cooperative to access BuyBoard and take advantage of the streamlined purchasing process that complies with procurement laws of each participating state.

[Learn More](#)

Texas
School districts, cities, counties, and other governmental entities in Texas participate in the Local Government Purchasing Cooperative and have relied on BuyBoard as a trusted and experienced cooperative purchasing source for years.

[Learn More](#)

Vendor
The extensive marketplace that BuyBoard offers is made possible by a long list of members representing a purchasing capacity in the billions each year—and participating entities have already met competitive procurement requirements by utilizing BuyBoard.

[Learn More](#)

P.O. Box 400, Austin, Texas 78767-0400
Ph: 800.695.2919. Email: info@buyboard.com
[Privacy Policy](#)
[Terms & Conditions of Use](#)
buyboard.com is the official source of information on BuyBoard-awarded contracts.
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- <https://www.buyboard.com/home.aspx>
- Anyone that is part of TAMUSA can signup as a member.

BuyBoard Cooperative

The screenshot shows the BuyBoard Cooperative web application interface. At the top, there is a navigation bar with a search bar and several menu items: Home, Shop, Purchase, Report, and a user profile icon. Below the navigation bar, the main content area is divided into several sections:

- BuyBoard Fiscal Year-to-Date:** A section with a blue header showing the fiscal year 19/10/1202-20/11/2023. It features a bar chart and a person icon. The text indicates "Historic Relates: \$79,422.54" and notes that this is a total of all prior year relates not including current year. A note at the bottom says "More fiscal-year financial statistics coming soon."
- Top Favorites:** A section with a blue header and a list of categories: PRODUCTS, VENDORS, CONTRACTS, and REPORTS. Each category has a brief description and a "See more..." link.
- Announcements:** A yellow header section containing several announcements with star icons, including "Report Issue", "Contract Documents", "Updated Feature: Requests for Quotes (RFQs)", "Updated Feature: Product Search", and "BuyBoard 2.0 is Here!". Each announcement includes a brief description and a "See more..." link.
- Recent Request for Quote Activity:** A section with a blue header and a table. The table has columns for TITLE, VENDOR, DUE, and UPDATED. The text below the table says "There are no Requests for Quotes to show."
- Recent Purchase Order Activity:** A section with a blue header and a table. The table has columns for UPDATED, VENDOR, STATUS, and ASSIGNEE.

- Click on “Shop” in the blue ribbon at the top of the screen.
- This allows you to sort by – products, favorites, recent or vendors.

BuyBoard Cooperative

The screenshot shows the BuyBoard Vendor Search interface. At the top, there is a search bar with the BuyBoard logo and a search icon. Below the search bar, there are navigation tabs for Products, Favorites, Recents, and Vendors. The main content area is divided into two columns: Search Vendors and Contracts. The Search Vendors column shows a search bar and a list of vendor cards. The first card is for 11 Productions LLC, featuring a logo with the number 11 and the text 'Eleven productions'. Below the logo, it says '11 Productions LLC', '→ SEE PRODUCTS', and 'ACTIVE CONTRACTS' with a dropdown arrow. At the bottom of the card is a button labeled '→ See Vendor'. The Contracts column shows a search bar and a list of contract cards. The first card is for 1st Choice Restaurant Equipment & Supply, LLC, featuring a logo with the text '1st Choice' and 'Restaurant Equipment & Supply, LLC'. Below the logo, it says '1st Choice Restaurant Equipment and Supply, LLC', '→ SEE PRODUCTS', and 'ACTIVE CONTRACTS' with a dropdown arrow. At the bottom of the card is a button labeled '→ See Vendor'. On the left side of the interface, there are two filter sections: 'Filter Vendors' and 'BRANDS'. The 'Filter Vendors' section includes 'ITEM TYPES' with checkboxes for Catalog, Base Model, Service, Coefficient, Product, and Only Self-Reporting Vendors. The 'BRANDS' section includes checkboxes for Ford, International, Dodge, Chevrolet, 3M Corporation, Advance, Chrysler, Freightliner, and Jeep.

- Vendor Search – you can search by a specific vendor or existing BuyBoard Contract #.
- Then you will click “Active Contracts” to see the backup documentation.

BuyBoard Cooperative

The screenshot shows the BuyBoard Cooperative search interface. At the top, there is a search bar with the text "4imprint" and a magnifying glass icon. Below the search bar, the results are displayed. On the left, there is a "Filter Vendors" section with a "Clear filters" link. The filters include "ITEM TYPES" (Catalog, Only Self-Reporting Vendors), "CERTIFICATIONS" (Historically Underutilized Business (HUB), Minority-owned, Service-disabled Veteran-owned, Woman-owned), and "State" and "City" dropdown menus, both set to "All". On the right, the search results for "4imprint" are shown. The search bar contains "4imprint". Below it, the 4imprint logo is displayed with a heart icon. The results list "4imprint, Inc." with a link to "SEE PRODUCTS". Below that, there is a section for "ACTIVE CONTRACTS" with a link to "671-22 | Awards, Trophies, and Personal Recognition Products". At the bottom of the results, there is a button labeled "See Vendor".

- Performed a search for 4imprint under “Vendor”
- Click on the down arrow symbol to see all contracts the vendor is associated with.

BuyBoard Cooperative

The screenshot displays the BuyBoard Cooperative website interface. At the top, there is a navigation bar with links for Home, Shop, Purchase, and Report. Below this, there are tabs for Products, Favorites, Recents, and Vendors. The main content area is divided into three columns: Search Vendors, Contracts, and Line Items. The Search Vendors column shows a search bar and a list of vendors. The Contracts column shows a search bar and a list of contracts. The Line Items column shows a search bar and a list of line items. The search results are displayed in a grid format, with each vendor or contract card containing a logo, name, contact information, and a 'See Vendor' button. The search filters on the left include Item Types (Catalog, Service, Only Self-Reporting Vendors), Certifications (Historically Underutilized Business (HUB), Minority-owned, Service-disabled Veteran-owned, Woman-owned), and State/Location filters.

Showing 1-24 of 32 results

Filter Vendors Clear filters

ITEM TYPES

- Catalog
- Service
- Only Self-Reporting Vendors

CERTIFICATIONS

- Historically Underutilized Business (HUB)
- Minority-owned
- Service-disabled Veteran-owned
- Woman-owned

State City

All All

Search Vendors Contracts Line Items

671-22 Awards, Trophies, and Perso ...

4imprint, Inc.

authentic promotions.com
800-497-7765
www.authenticpromotions.com

Awards by GCT
Prima

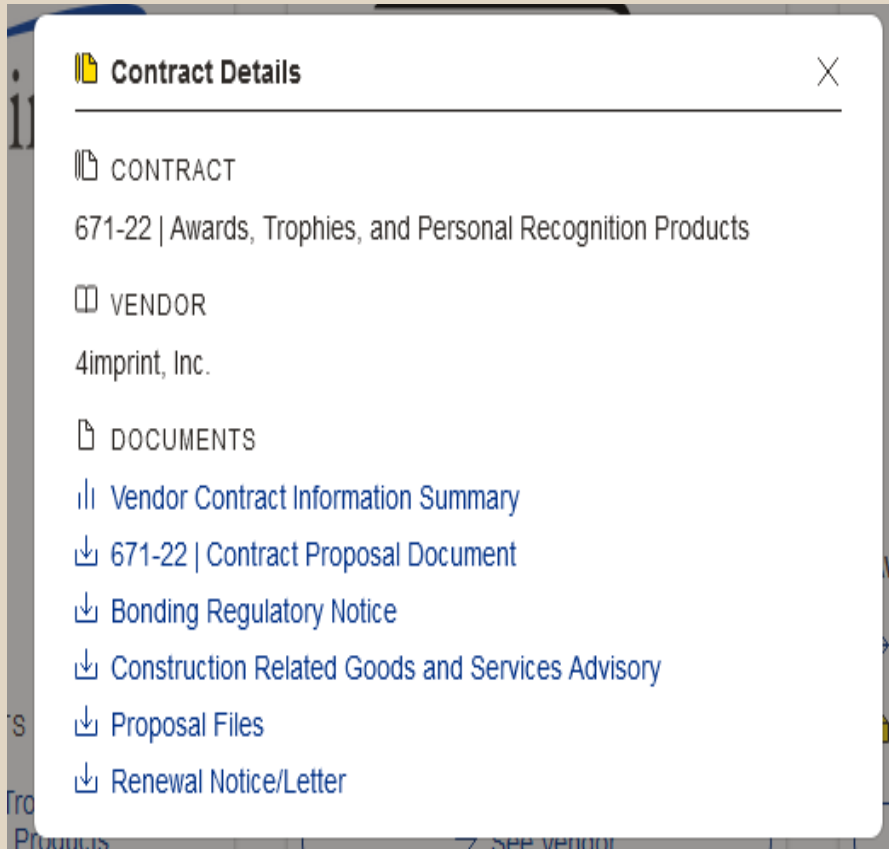
→ SEE PRODUCTS

ACTIVE CONTRACTS

→ See Vendor

- Search by Contract number.
- This will show all vendors that are awarded under that one contract.

BuyBoard Cooperative



Contract Details [X]

CONTRACT
671-22 | Awards, Trophies, and Personal Recognition Products

VENDOR
4imprint, Inc.

DOCUMENTS

- Vendor Contract Information Summary
- 671-22 | Contract Proposal Document
- Bonding Regulatory Notice
- Construction Related Goods and Services Advisory
- Proposal Files
- Renewal Notice/Letter

- When you click on the contract number under each vendor, it will provide a summary of information.
- Procurement will save the “Vendor Contract Information Summary” to all purchases utilizing a cooperative.

BuyBoard Cooperative

BuyBoard Vendor Contract Information Summary	
Vendor	4imprint, Inc.
Contact	Jen Groskreutz
Phone	888-234-5797
Email	govrequests@4imprint.com
Vendor Website	www.4imprint.com
TIN	39-1837105
Address Line 1	101 Commerce Street
Vendor City	Oshkosh
Vendor Zip	54901
Vendor State	WI
Vendor Country	USA
Delivery Days	10
Freight Terms	FOB Destination
Payment Terms	Net 30 days
Shipping Terms	Freight prepaid by vendor and added to invoice
Ship Via	Best Way
Designated Dealer	No
EDGAR Received	Yes
Service-disabled Veteran Owned	No
Minority Owned	No
Women Owned	No
National	Yes
No Foreign Terrorist Orgs	Yes
No Israel Boycott	Yes
MWBE	No
ESCs	All Texas Regions
States	All States
Contract Name	Awards, Trophies, and Personal Recognition Products
Contract No.	671-22
Effective	07/01/2022
Expiration	06/30/2025
Accepts RFQs	Yes

- Sample of the summary. This will tell you –
 - Payment Terms
 - Shipping Terms
 - Contract Terms
 - Point of Contact

Purchasing Cooperatives

- Important Reminders –
 - Make sure the contract number is referenced on your quote
 - Make sure the cooperative contract is still valid (has not expired)
 - Payment and shipping terms match – we don't want to pay for freight when the contract term indicates all freight is included.
 - Contract is for what you are buying – Contract name should mirror your product/service description.

Year End Closing

- FY 2023 ends August 31, 2023 – however AggieBuy will stay open until September 6th. At that time, all funds will become FY 2024.
- The following link is on the TAMU, Financial Management Operations site for FY23 Closing Procedures – *for reference only*
- <https://fmo.tamu.edu/year-end.html>

Year End Closing

- Review your pending purchase orders.
- If you know the purchase needs to come out of FY 24, you can make that change now.
- Caution – all FY 24 orders, regardless of amount, will come to Procurement Services to approve until FY 2024 is opened.

Year End Closing

- Purchases that need to be bid out now, can be submitted on FY 23 or FY 24 funds. The requisition will encumber your money in FY 23 and will roll to FY 2024 when the PO is created.
- When entering a requisition on FY 2024 funds, the encumbrance will not show on your account until September 6th when FY 2024 is opened. If there is an issue with your account, the order will error out then.

Year End Closing

- Releasing encumbrance on existing Purchase Orders – You will need to create a change order on each purchase order and zero out the line item.
- Your reason for creating the change order needs to explain why we are releasing the funds.
 - Paid via a credit card
 - Item was never received
 - All invoices have been paid - all remaining funds need to be released

Questions!

Submit topics for future training to

p-winkler@tamu.edu

Please use subject line –

Training for TAMUSA