

Texas Tech University Health Sciences Center

REQUISITION TO CHECK

TTUHSC PURCHASING

Agenda

- Processing a TechBuy Order
- Receiving Receipts
- Payment

Processing a TechBuy Order

Determine the type of order to process

- Non-Catalog/Standing order
 - Order under \$5,000 (New limit under \$15,000)
 - Quote from vendor
- Informal Bid
 - Order total \$5,000-\$25,000 (New limits \$15,000.01-\$40,000)
 - Requires quotes from at least three vendors (2 from HUB vendors)
- Formal Solicitation
 - Order total \$25,000+ (New limits \$40,000.01+)
 - Requires Bid Supplier non-catalog to be submitted to request solicitation
 - Solicitation process is completed by the Purchasing department
- Sole Source
 - Only one vendor can supply the item/services
 - Sole Source form must be completed in detail and attached to the order

Processing a TechBuy Order

Processing a TechBuy Non-Catalog order or Standing order


Overview:

- In TechBuy select the Non-Catalog or Standing order form from the Home/Shop page.
 - Non-Catalog – One time purchase from vendor.
 - Standing Order – Open PO for items/services listed for the current FY.
- Complete each field and select add and go to cart.
 - The bold titles are required fields.
 - The non bold titles are optional fields.
- Please see following slides for step by step guide.

Processing a TechBuy Order

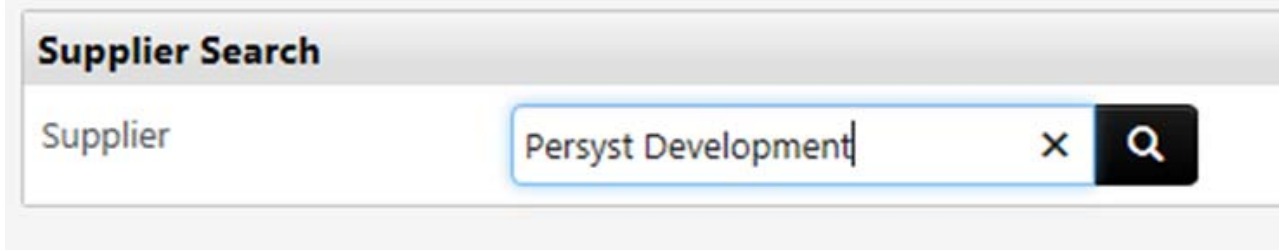
Select Supplier

- Select Supplier by clicking **Supplier Search** in the Enter Supplier



The screenshot shows a web form titled "Non-Catalog Purchase Form". Under the "Supplier" heading, there is a label "Enter Supplier" and an empty text input field. Below the input field, the text "or" is displayed, followed by two blue links: "Supplier Search" and "Enter Manually".

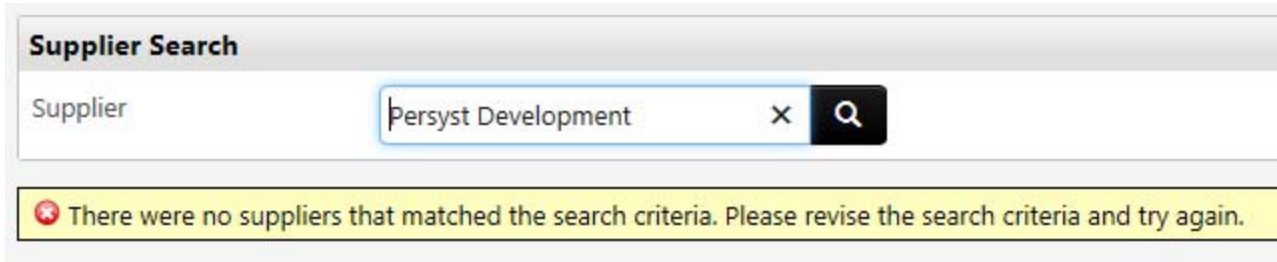
- Enter the Suppliers name



The screenshot shows a search form titled "Supplier Search". It features a label "Supplier" and a text input field containing the text "Persyst Development". To the right of the input field is a small "x" icon for clearing the text, and further right is a black button with a white magnifying glass icon for submitting the search.

Processing a TechBuy Order

- The suppliers name will appear if they are in the system. If an error states no suppliers were matched you will need to enter the suppliers information manually.



The screenshot shows a 'Supplier Search' form. The search input field contains 'Persyst Development' and has a search button (magnifying glass icon). Below the search field, a yellow error message box displays: 'There were no suppliers that matched the search criteria. Please revise the search criteria and try again.'

- Click on **Enter Manually** in the Enter Supplier field.



The screenshot shows the 'Non-Catalog Purchase Form'. Under the 'Supplier' section, there is an 'Enter Supplier' field. To the right of this field is a text input box. Below the input box, the text 'or' is displayed, followed by the links 'Supplier Search | Enter Manually'.

Processing a TechBuy Order

- Enter the Supplier's Name, Phone Number, Fax Number and Email. The contact information provided is used by the vendor team to request the W-9/W-8 information required for the vendor to be added to the system. The vendor team will contact the vendor when the requisition is received in the purchasing department.

Non-Catalog Purchase Form	
Supplier	
Supplier Name	<input type="text" value="Persyst Development"/>
DUNS No.	<input type="text"/>
Supplier Phone	<input type="text" value=""/> <input type="text" value="928"/> <input type="text" value="708-0705"/> <input type="text" value=""/>
	(Country, Area, Phone, Ext)
Supplier Fax No.	<input type="text" value=""/> <input type="text" value="928"/> <input type="text" value="771-1209"/> <input type="text" value=""/>
	(Country, Area, Phone)
Supplier Email	<input type="text" value="sales@persyst.com"/> <input type="button" value="x"/>
	cancel manual entry

Processing a TechBuy Order

Select Purchase Category

- Select the correct Purchase Category from the drop down list. The purchase category field is used to route the order to correct approvers and purchasing buyer.

Select Quantity, Packaging (UOM), and Unit Price

- Select the quantity of items being purchased. If a standing order is being created the quantity will be 1.
- Select the packaging (UOM) of the items being purchased.
 - Non-Catalog orders will vary based on items purchased. The majority are 1/EA.
 - If a standing order is being created the packaging (UOM) will be 1/LOT.

Processing a TechBuy Order

Product Description

- Enter descriptive information about the items/services being purchased. The first 250 characters will appear on the check stub. This field will be included on the purchase order when sent to the vendor.

Specifications/Long Text

- This field is used for additional specifications. This field is not sent to the vendor on the purchase order.

Processing a TechBuy Order

Shipping Information

- There are two selections for Shipping
 - Shipping cost included in line item – select this option when shipping has already been included in the line item.
 - Shipping is Prepaid and will be added to invoice – select this option when shipping was not included in the quote but will be added to the invoice.

Shipping Information

- ☒ Shipping Cost Included in Line Item
- ☐ Shipping is Prepaid and Will Be Added to Invoice

Prior Year PO Number

- Enter prior PO number in this field. This field is designed to reference back to the prior year and provide connection between the purchase orders. It is used by Purchasing to reference the prior year attachments, notes, etc. to provide consistency and accuracy.

Processing a TechBuy Order

Form submission

- Once all bold/required fields are completed the form is ready to be submitted to your cart. In the available actions drop down you can choose the following:
 - Add and go to cart
 - Add to cart and return
 - Add to cart
 - Add to draft cart or pending PR/PO
 - Add to PO Revision
 - Add to Favorites
 - Save
 - Add to new cart
- Select the appropriate action and click go.

Processing a TechBuy Order



Shopping Cart

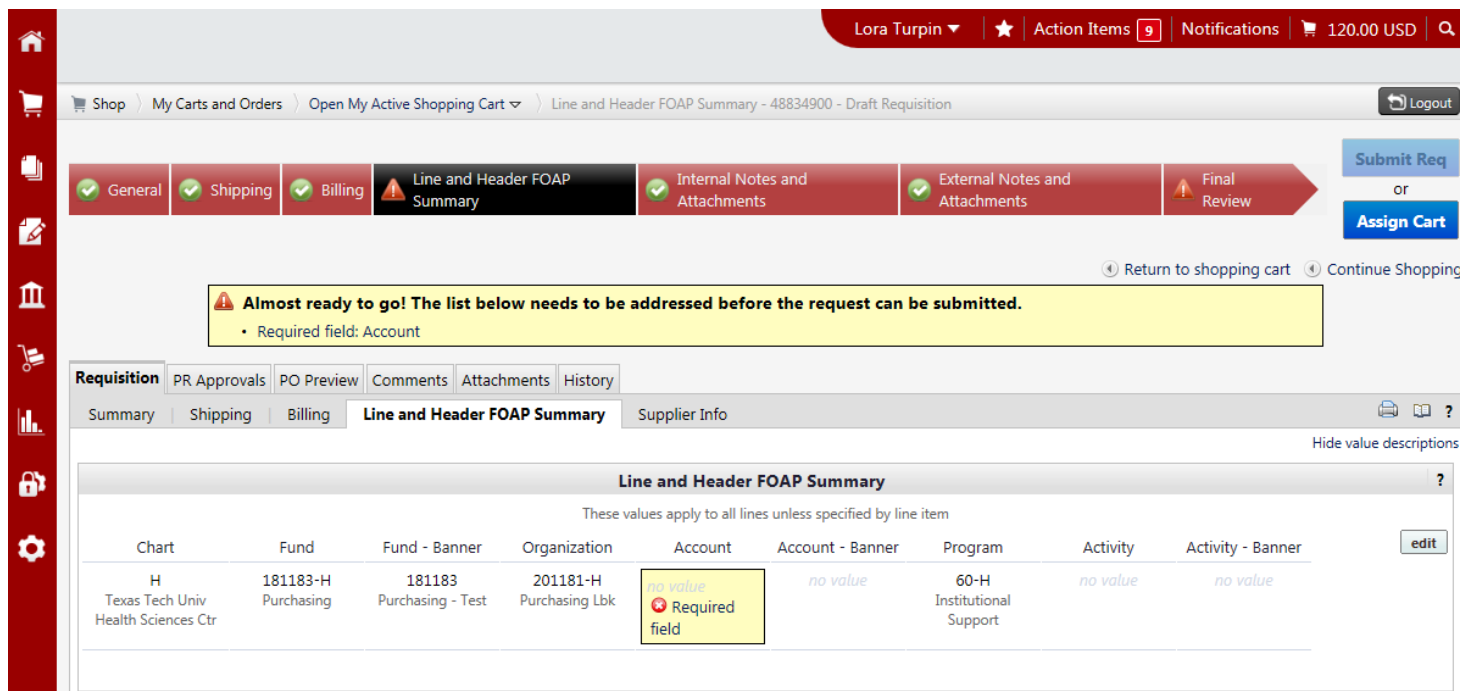
- Once all line items are completed you will be taken to your cart to complete the requisition.
 - Click Proceed to Checkout to continue to the requisition.
 - Click Assign Cart to assign the cart to another user for approval.

The screenshot shows the TechBuy Shopping Cart interface. At the top, a red navigation bar displays the user name 'Lora Turpin', a star icon, 'Action Items' with a count of 9, 'Notifications', a shopping cart icon with '120.00 USD', and a search icon. Below this, a breadcrumb trail reads: Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 48834900 - Draft Requisition. A 'Logout' button is in the top right. The main header area shows 'Shopping Cart for Lora Turpin' with a 'Continue Shopping' link. A summary box indicates '1 Item(s) for a total of 120.00 USD' and contains 'Proceed to Checkout' and 'Assign Cart' buttons. Below the header, there's a section for 'Officewise Furniture and Supply' with a 'more info...' link. It shows 'PO Purchase Order 1' with an 'Edit' button and the address '1212 Avenue J, Lubbock, TX 79401-4020 US'. A table lists the cart items. The first item is 'Haworth Chair with arms, color: red and black' with a unit price of 120.00 USD, a quantity of 1, and a total of 120.00 USD. To the left of the table, there are buttons for 'Add to Favorites', 'Remove', and 'More Actions'. A note indicates the item was added on Mar 26, 2014. Below the item name, there are fields for 'Part Number' (1234), 'Contract' (H-7110380), 'Spec Furniture' (change...), 'Commodity Code' (input field), and 'Taxable' (checkbox).


Product Description	Unit Price	Quantity	Total
Haworth Chair with arms, color: red and black open form... Part Number: 1234 Contract: H-7110380 more info... Spec Furniture: change... Commodity Code: <input type="text"/> Taxable: <input type="checkbox"/>	120.00 USD 1/EA	1	120.00 USD

Processing a TechBuy Order

- Complete all fields marked with  across the top of the cart. All fields must be marked with a green check  to submit the requisition. Please review all fields to verify the correct information has been entered.



The screenshot displays the TechBuy system interface for processing a requisition. At the top, a navigation bar shows the user's name (Lora Turpin), a star icon, and counts for Action Items (9) and Notifications. Below this, a breadcrumb trail indicates the current location: Shop > My Carts and Orders > Open My Active Shopping Cart > Line and Header FOAP Summary - 48834900 - Draft Requisition. A sidebar on the left contains various icons for navigation. The main content area features a progress bar with steps: General (checked), Shipping (checked), Billing (checked), Line and Header FOAP Summary (active, with a warning icon), Internal Notes and Attachments (checked), External Notes and Attachments (checked), and Final Review (with a warning icon). Buttons for 'Submit Req' and 'Assign Cart' are visible. A yellow warning box states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' with a bullet point: 'Required field: Account'. Below the warning, a tabbed interface shows 'Requisition' as the active tab, with sub-tabs for 'Summary', 'Shipping', 'Billing', 'Line and Header FOAP Summary' (selected), and 'Supplier Info'. The 'Line and Header FOAP Summary' section contains a table with the following data:

Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program	Activity	Activity - Banner
H Texas Tech Univ Health Sciences Ctr	181183-H Purchasing	181183 Purchasing - Test	201181-H Purchasing Lbk	no value  Required field	no value	60-H Institutional Support	no value	no value

Processing a TechBuy Order

- Check PR approvals tab to view workflow of the order.

The screenshot displays the Texas Tech University Health Sciences Center TechBuy interface. At the top, the header includes the university logo, the name "TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER.", and user information for Lora Turpin. A navigation breadcrumb shows the path: Shop > My Carts and Orders > Open My Active Shopping Cart > Approvals - 76580823 - Draft Requisition. A progress bar at the top indicates the status of various steps: General, Shipping, Billing, Line and Header FOAP Summary, Internal Notes and Attachments, External Notes and Attachments, and Final Review. A yellow message box states: "All documents have been completed and this request is ready to be submitted. Once you have completed the request, you may continue by clicking the button at the top of the page." Below this, the "PR Approvals" tab is selected, showing a workflow diagram. The workflow starts with "Submitted Future" (On behalf of: Debra Vaughn), followed by "Budget Authorization Future", "HSC Purchase Review Future" (with a "view approvers" link), and "Create PO Future", ending with a "Finish" icon. A callout box labeled "PR Approval" points to the "PR Approvals" tab.

Processing a TechBuy Order

Search for correct account code

- Select edit at the line and header FOAP summary.

Line and Header FOAP Summary								
Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program	Activity	Activity - Banner
H Texas Tech Univ Health Sciences Ctr	181183-H Purchasing	181183 Purchasing	201181-H Purchasing Lbk	730000-H SM Consumables	730000 SM Consumables	60-H Institutional Support	no value	no value

Click Edit

- Select from all values

Funding Information						
Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program
H Select from profile values... Select from all values...	181183-H Select from profile values... Select from all values...	181183 Select from all values...	201181-H Select from profile values... Select from all values...	730000-H Select from all values...	730000 Select from all values...	60-H Select from all values...

Click Select from all values

- Type item description and click search.

☐ Custom Field Search

Value

Description

Computer

×

Search

Processing a TechBuy Order

Search for correct account code

- Select appropriate code.

[Close](#)

[+ Click to filter search results ?](#)

Results Per Page 20 ▾

Values Found 12

◀ Page 1 of 1 ▶ ?

Value ▲	Description ▲	
726200-H	MR Computer Software	select
726700-H	MR Computer Equipment Maint/Repair	select
737700-H	OC Computer Equipment Expensed	select
737800-H	OC Computer Equipment Controlled	select
737900-H	CO Computer Equipment	select
738001-H	OC Computer Software Expensed	select
738002-H	OC Computer License Fees Expensed	select
739500-H	CO Computer Software/License Fees	select
739501-H	CO Computer Software Capitalized	select
739502-H	CO Computer License Fees Capitalizd	select
741100-H	RL Computer Equipment	select
741500-H	RL Computer Software	select

Results Per Page 20 ▾

◀ Page 1 of 1 ▶

Processing a TechBuy Order

Search for correct account code

- The code selected will populate the account field.

Funding Information				
Chart	Fund	Fund - Banner	Organization	Account
H	181183-H	181183	201181-H	737700-H
Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from all values...	Select from profile values... Select from all values...	Select from all values...

Processing a TechBuy Order

- For Recurring Payments or Advanced Pays click on the final review tab.

The screenshot displays the TechBuy system interface for processing a requisition. At the top, a red navigation bar shows the user 'Lora Turpin', a star icon, 'Action Items' with a count of 12, 'Notifications', a shopping cart icon with '120.00 USD', and a search icon. Below this, a breadcrumb trail reads: 'Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - 48834900 - Draft Requisition'. A 'Logout' button is in the top right. The main content area features a horizontal progress bar with seven tabs: 'General', 'Shipping', 'Billing', 'Line and Header FOAP Summary', 'Internal Notes and Attachments', 'External Notes and Attachments', and 'Final Review'. The 'Final Review' tab is selected and highlighted with a black arrow. To the right of the progress bar are two blue buttons: 'Submit Req' and 'Assign Cart', with the text 'or' between them. Below the progress bar, a yellow message box states: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' To the right of the message box are two links: 'Return to shopping cart' and 'Continue Shopping'. At the bottom, a horizontal menu contains tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. The 'Requisition' tab is currently selected.

Note: A state agency may not pay for goods or services before their delivery to the agency, unless the advance payment is necessary and serves a proper public purpose

Processing a TechBuy Order

- Scroll to the line item you would like to set for recurring or advanced pay. Click the edit button on each line item.

Supplier / Line Item Details ?

Hide line details

For selected line items

Officewise Furniture and Supply [more info...](#)

PO Purchase Order 1

1212 Avenue J, Lubbock, TX 79401-4020 US

Add non-catalog item for this supplier...

Contract H-7110380 [more info...](#)

PO Number To Be Assigned [View/edit by line item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	
1 Haworth Chair with arms, color: red and black more info...	1234	1/EA	120.00 USD	<input type="button" value="edit"/>
Taxable		x		
Replenish stock		x		
Commodity Code		no value		
Recurring Payment		x		
Advanced Pay		x		
Internal Note				
Internal Attachments				
add attachment...				
External Note		no note		
Attachments for supplier				
add attachment...				
Supplier subtotal			120.00USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	120.00
Total	120.00 USD

Processing a TechBuy Order

- Click the appropriate check box and click save.

Edit Line ? X

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	Haworth Chair with arms, color: red and black	1234	1/EA	120.00	1 EA	120.00 USD

Contract: H-7110380
Select price or contract...

Taxable ☐
Replenish stock ☐
Commodity Code
Recurring Payment ☐
Advanced Pay ☒

Internal Note

expand | clear

expand | clear

Click Save

Click appropriate box

Save Cancel

Processing a TechBuy Order

- Once all fields have been reviewed and have a green check, click Submit Req or Assign Cart.

Shop > My Carts and Orders > Open M... ary - 48834900 - Draft Requisition

Lora Turpin 0.00 USD

Logout

Submit Req or Assign Cart

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:
Proceed to the next step: Internal Notes and Attachments. Go straight to the end: Final Review.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Line and Header FOAP Summary** Supplier Info

Hide value descriptions

Line and Header FOAP Summary

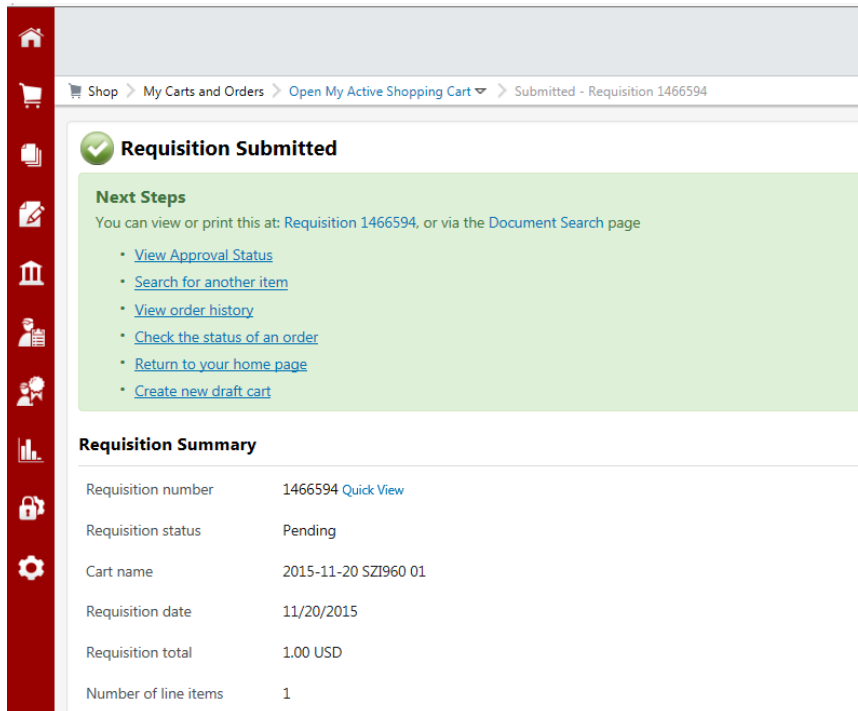
These values apply to all lines unless specified by line item

Chart	Fund	Fund - Banner	Organization	Account	Account - Banner	Program	Activity	Activity - Banner
H Texas Tech Univ Health Sciences Ctr	181183-H Purchasing	181183 Purchasing - Test	201181-H Purchasing Lbk	733403-H OC Office Furniture Expensed	733403 OC Office Furniture Expensed	60-H Institutional Support	no value	no value

edit

Processing a TechBuy Order

- Once submitted you will receive a notification with the requisition number for your records.



Shop > My Carts and Orders > Open My Active Shopping Cart > Submitted - Requisition 1466594

Requisition Submitted

Next Steps
You can view or print this at: [Requisition 1466594](#), or via the [Document Search](#) page

- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Requisition Summary

Requisition number	1466594 Quick View
Requisition status	Pending
Cart name	2015-11-20 SZI960 01
Requisition date	11/20/2015
Requisition total	1.00 USD
Number of line items	1

Processing a TechBuy Order

Required Attachments (Word or PDF documents)

- Quote – A valid quote is required to be attached on all requisitions. A quote is considered to be valid 30 days after the quote date unless an expiration date is stated.
- ICQ (Independent Contractor Questionnaire) – ICQ's must be attached to orders that an individual is providing a service to the institution.
- COI (Certificate of Insurance) – A COI is required when work/labor/delivery is being provided on the institutions property.
- Artwork – TTUHSC artwork (Seal, Double T, etc.) is to be attached to requisitions when being printed on items (promotional items, lab coats, etc).

Processing a TechBuy Order

Required Approvals

- IT – Approval is required on all TTUHSC IT related purchases (Computers, software, etc). If the account code or category selected is IT related the order will route to IT. If not, Purchasing will request approval from IT and will not approve until approval is received.
- Communications and Marketing – Approval is required on all TTUHSC artwork. Please allow additional time for Purchasing to route the order to them for approval.
- EH&S – Approval is required on all hazardous and radio active purchases. If the category chemicals and gases-radioactive is selected the order will be automatically routed. If not, Purchasing will request approval from EH&S and will not approve until approval is received.
- Pharmaceuticals – Approval is required from designated SOP representative. If the category Pharmaceuticals is selected the order will be automatically routed. If not, Purchasing will request approval from designated SOP representative and will not approve until approval is received.

Receiving Receipts

- The receiving receipt feature allows you to enter receiving in TechBuy. In order to maintain an order's history, all receiving information for TechBuy purchase orders must be submitted through the TechBuy receiving process. Do not wait to receive an invoice or a request from Accounts Payable to complete "receiving" in TechBuy. Receiving should be completed when goods/services are received.
- There are two types of receipts that can be entered within TechBuy:
 - **Quantity Receipt** – receipt of item(s)
 - **Cost Receipt** – receipt of service(s)

Receiving Receipts

Creating a Quantity Receipt

- To document the receipt of specific items, select the Create Quantity Receipt option from the Available Actions dropdown box and select Go.

The screenshot shows a web application interface for managing purchase orders. At the top, a navigation bar includes the user name 'Lora Turpin', a star icon, 'Action Items 14', 'Notifications', a currency display '87.75 USD', and a search icon. Below this, a breadcrumb trail reads 'Orders & Documents > Document Search > Search Documents > Status - PO P0256592'. A 'Logout' button is in the top right. The main content area is titled 'Return to Search Results' and displays details for 'PO/Reference No. P0256592 Revision 0' from 'Supplier Summus Staples'. A 'Purchase Order Number(s)' dropdown is set to 'P0256592'. A callout bubble points to a dropdown menu labeled 'Create Quantity Receipt' with a 'Go' button. Another callout bubble points to the 'Go' button. Below the header, tabs for 'Status', 'Purchase Order', 'Revisions', 'PO Approvals', 'Shipments', 'Receipts', 'Invoices', 'Comments', 'Attachments', and 'History' are visible. The 'Status' tab is active, showing 'General Information' and 'Document Status'. The 'General Information' section lists details like PO/Reference No., Revision No., Supplier Name, Purchase Order Date, Total, Owner Name, Owner Phone, Owner Email, Requisition Number, and Internal PO Ref #. The 'Document Status' section shows 'A/P status' as 'Open', 'Workflow' as 'Completed (11/7/2013 9:20 AM)', 'Distribution' as 'The system distributed the purchase order using the method(s) indicated below the last time it was distributed: cXML (Electronic Integration) Manual', 'Distribution Date/Time' as '11/7/2013 9:19 AM', and 'Supplier' as 'Sent To Supplier'. Below this is a 'Line Item Status' table with columns: Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, Ext. Price, Supplier, Receiving, Invoicing, and Matching. The table lists six line items with their respective details. At the bottom, a summary line states 'Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.' followed by a 'Total' of '182.31 USD'.

Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	✓ Microsoft Natural Ergonomic Desktop 7000 Keyboard and Mouse, Black/Silver more info...	698805	EA	115.40	1 EA	115.40 USD	Sent To Supplier	none	none	No Matches
2	✓ Ampad Envirotec 100% Recycled Colored Top-Tab File Folders, Black & White, LETTER-size Holds 8 1/2" x 11", 50/Pk more info...	884368	PK	9.99	2 PK	19.98 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
3	✓ Duracell CopperTop AA Alkaline Batteries, 20/Pk more info...	703715	PK	12.99	1 PK	12.99 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
4	✓ Sanford Sharpie Retractable Pens, Fine Point, 0.3 mm, Assorted Ink / Black Barrel, 3/Pk more info...	805691	PK	10.02	2 PK	20.04 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
5	✓ Staples Poly File Jackets, Letter, 1" Expansion, 10/Pk more info...	903616	PK	9.46	1 PK	9.46 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched
6	✓ Divide It Up Four-Pocket Poly Folder, 11 x 8-1/2, Assorted more info...	ESS99837	EA	2.22	2 EA	4.44 USD	Sent To Supplier	none	Fully Invoiced	Fully Matched

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals. **Total 182.31 USD**

Receiving Receipts

- A receipt is created utilizing the information from the purchase order. It includes a header section that contains basic receiving information and a receipt summary section to enter your actual quantities received. The Receipt Summary section is where you will enter the quantity of the items received.

The screenshot shows the Receipts system interface. A red sidebar on the left contains navigation icons. The top navigation bar includes the user name 'Lora Turpin', a star icon, 'Action Items 14', 'Notifications', a shopping cart icon with '87.75 USD', and a search icon. Below the navigation bar is a 'Logout' button. The main content area is divided into sections. The 'Header Information' section is highlighted with a yellow border and a callout labeled 'Header'. It contains fields for 'Receipt Name' (2014-02-18 SZI960 02), 'Receipt Create Date' (2/18/2014 2:18:47 PM), and 'Source' (Manual). Below these are tabs for 'Summary', 'Comments (0)', and 'History'. The 'Receipt Summary' section is highlighted with a red border and a callout labeled 'Receipt Summary'. It contains a table with columns: 'Receipt No.', 'Receipt Date', 'Packing Slip No.', 'Supplier Name', and 'Received by'. The 'Receipt No.' is 'To Be Assigned', 'Receipt Date' is '2/18/2014', 'Supplier Name' is 'Summus Staples', and 'Received by' is 'Lora Turpin (Texas Tech University Health Sciences Center)'. Below the table are fields for 'RECEIPT ADDRESS' (Location, Contact Name, Phone, Email) and 'DELIVERY' (Carrier, Tracking No., Flexible Text Field, Flexible Text Field 2, Flexible Drop Down, Attachments, Notes). The 'Receipt Lines' section is also visible, showing a table of receipt details.

Header Information

Receipt Name: 2014-02-18 SZI960 02
 Receipt Create Date: 2/18/2014 2:18:47 PM
 Source: Manual

Receipt Summary

Receipt No.	Receipt Date	Packing Slip No.	Supplier Name	Received by
To Be Assigned	2/18/2014 mm/dd/yyyy		Summus Staples	Lora Turpin (Texas Tech University Health Sciences Center)

RECEIPT ADDRESS

Location:
 Contact Name: Debbie Ramirez
 Phone: +1 (806) 743-2300
 Email: debbie.ramirez@ttuhsc.edu

DELIVERY

Carrier:
 Tracking No.:
 Flexible Text Field:
 Flexible Text Field 2:
 Flexible Drop Down:
 Attachments:
 Notes:

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Product Name	Catalog No.	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0256592	1	Microsoft Natural Ergonomic Desktop 7000 Keyboard and Mouse, Black/Silver	698805		1		Received	Remove Line Receive & Return
P0256592	2	Ampad Envirotec 100% Recycled Colored Top-Tab File Folders, Black & White, LETTER-size Holds 8 1/2" x 11", 50/Pk	884368		1		Received	Remove Line Receive & Return

See next page for definition of terms

Receiving Receipts

- The Quantity field will pre-populate with the remaining quantity to be received for each item. Enter the appropriate quantity. Select “line status” from the drop-down list for each item:
 - **Received** - Receive the quantity entered.
 - **Returned** - Return the quantity entered. Used only when instructed by AP because receipt cannot be reopened.
 - **Cancelled** - Do not use.
- Select “Actions” for each item:
 - **Remove Line** – When creating receipts, be sure to select “remove line” for the item(s) on the PO that have not been received. Otherwise, all items will appear as received and payment will process for all items.
 - **Received/Returned** – Receive/Return the quantity entered. This is used when an item arrives and immediately returned due to damage, over shipment or any other reason. Department must follow up with vendor.
- Once the receiving receipt is accurate, select Complete at the top of the page.
- TechBuy will assign a receipt number to the completed document. **PLEASE GIVE TIME FOR IT TO PROCESS.**

Receiving Receipts

Lora Turpin | Action Items 14 | Notifications | 87.75 USD | Logout

Orders & Documents | Document Search | Search Documents | New Qty Receipt

Delete | Add PO | Save Updates | Complete

Summary | Comments (0) | History

Header Information

Receipt Name: 2014-02-18 SZI960 02 | Receipt Create Date: | Source: Manual

Receipt No	Receipt Date	Packing Slip No.	Supplier Name
To Be Assigned	2/18/2014 <small>mm/dd/yyyy</small>		

Location: | RECEIPT ADDRESS:

Contact Name Debbie Ramirez
 Phone +1 (806) 743-2300
 Email debbie.ramirez@ttuhsc.edu
 Tx Tech Univ HSC
 3601 4TH ST
 Rm/Building MS 8310 / 2C400
 LUBBOCK, TX 79430
 United States

Carrier: | DELIVERY: Other

Tracking No.: | Flexible Text Field: | Flexible Text Field 2: | Flexible Drop Down: | Attachments: | Notes: (1,000 Chars. Max)

Attach/Link: Received all items except for the printer. It is expected

Receipt Lines

Line Details

Show Receipt Details

PO No.	PO Line No.	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0256592	1		1		Received	Remove Line Receive & Return
P0256592	2		1		Received	Remove Line Receive & Return

For Selected Lines: Remove Selected Items | Go

Select Complete

Very Important to enter the **ACTUAL DATE** the items were received.

Select when removing line(s)

Enter correct Quantity

Remember: Remove line if item is not received.

Receiving Receipts

Creating a Cost Receipt

- To document the receipt of services, select the Create Cost Receipt option from the Available Actions dropdown box and select Go.

The screenshot displays a procurement system interface. At the top, a red navigation bar shows the user 'Lora Turpin', 'Action Items' (12), 'Notifications', and a currency of '87.75 USD'. Below this, a breadcrumb trail reads 'Orders & Documents > Document Search > Search Documents > Status - PO P0163416'. A 'Return to Search Results' link is also present. The main content area is for Purchase Order P0163416, Revision 0, from Supplier LVR Carpet Center Inc. A callout box points to the 'Available Actions' dropdown, which has 'Create Cost Receipt' selected. Another callout box points to the 'Go' button next to the dropdown. The 'Document Status' section shows the order is 'Open' with a 'Completed' workflow on 6/13/2012. The 'Line Item Status' table below shows one line item: 'Remove existing VCT and install new VCT in LCC elevator w.o. 12-7385' with a total value of 1,015.00 USD.

Select Create Cost Receipt

Click Go

Purchase Order Number(s) P0163416

Available Actions **Create Cost Receipt** Go

General Information

PO/Reference No. **P0163416**
Revision No. 0
Supplier Name LVR Carpet Center Inc. more info...
Purchase Order Date 6/13/2012
Total 1,015.00
Owner Name Garrel Sisson
Owner Phone +1 (806) 743-4777 ext.234
Owner Email garrel.sisson@ttuhsc.edu
Requisition Number 30624588 view | print
Internal PO Ref #: 22178144

Document Status

A/P status Open
Workflow **Completed** (6/13/2012 12:59 PM)
Distribution The system distributed the purchase order using the method(s) indicated view below the last time it was distributed:
Fax: +1 (806) 866-0084
Manual
Distribution Date/Time 6/13/2012 12:59 PM
Supplier Sent To Supplier view

Line Item Status

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1	✓ Remove existing VCT and install new VCT in LCC elevator w.o. 12-7385 more info...	services	1/JA	1,015.00	1 JA	1,015.00 USD	Sent To Supplier	Fully Received	none	No Matches
Total									1,015.00 USD	

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Receiving Receipts

- A receipt is created utilizing the information from the purchase order. It includes a header section that contains basic receiving information and a receipt summary section to enter your actual quantities received. The Receipt Summary section is where you will enter the quantity of the items received.

The screenshot shows the Receipts system interface. A red sidebar on the left contains navigation icons. The top navigation bar includes the user name 'Lora Turpin', a star icon, 'Action Items 14', 'Notifications', a shopping cart icon with '87.75 USD', and a search icon. Below the navigation bar is a 'Logout' button. The main content area is divided into sections. The 'Header Information' section is highlighted with a yellow border and a callout labeled 'Header'. It contains fields for 'Receipt Name' (2014-02-18 SZI960 02), 'Receipt Create Date' (2/18/2014 2:18:47 PM), and 'Source' (Manual). Below these are tabs for 'Summary', 'Comments (0)', and 'History'. The 'Receipt Summary' section is highlighted with a yellow border and a callout labeled 'Receipt Summary'. It contains fields for 'Receipt No.' (To Be Assigned), 'Receipt Date' (2/18/2014), 'Packing Slip No.', 'Supplier Name' (Summus Staples), and 'Received by' (Lora Turpin). It also includes a 'RECEIPT ADDRESS' section with a location dropdown, contact information for Debbie Ramirez, and a 'DELIVERY' section with a carrier dropdown, tracking number, and flexible text fields. The 'Receipt Lines' section is highlighted with a red border and contains a table of receipt details. A callout labeled 'See next page for definition of terms' points to the 'Line Status' and 'Actions' columns of the table.

Header

Receipt Summary

Receipt Lines

PO No.	PO Line No.	Product Name	Catalog No.	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0256592	1	Microsoft Natural Ergonomic Desktop 7000 Keyboard and Mouse, Black/Silver	698805		1		Received	Remove Line Receive & Return
P0256592	2	Ampad Envirotec 100% Recycled Colored Top-Tab File Folders, Black & White, LETTER-size Holds 8 1/2" x 11", 50/Pk	884368		1		Received	Remove Line Receive & Return

Receiving Receipts

- The **Cost** field will pre-populate with the remaining cost for each item. Enter the appropriate cost of the services received. Select “line status” from the drop down list for each item:
 - **Cost Received** - Receive the cost entered.
 - **Cost Cancelled** – Do not use.
- Select “Actions” for each item:
 - **Remove Line** – When creating receipts, be sure to select “remove line” for the services(s) on the PO that have not been performed. Otherwise, all services will appear as received and payment will process for all services.
 - **Received/Cancel** – Receive/Cancel the cost entered.
- Once the receiving receipt is accurate, select Complete at the top of the page.
- TechBuy will assign a receipt number to the completed document. **PLEASE GIVE TIME FOR IT TO PROCESS.**

Receiving Receipts

The screenshot shows the 'New Cost Receipt' form in the TechBuy system. The form includes a header section with fields for Receipt Name, Receipt Date, Packing Slip No., Supplier Name, and Received by. Below this is the 'RECEIPT ADDRESS' section with a dropdown for Location and a text area for contact information. The 'DELIVERY' section includes a dropdown for Other and a text area for Tracking No. The 'Receipt Lines' section is at the bottom, showing a table of receipt lines with columns for PO No., PO Line No., Product Name, Log No., Previous Receipt, Cost, Line Status, and Actions.

Callouts highlight the following steps:

- Select Complete:** A callout points to the 'Complete' button in the top right corner of the form.
- Very Important to enter the ACTUAL DATE the service(s) were received.** A callout points to the 'Receipt Date' field, which is currently set to '2/18/2014'.
- Enter correct Cost:** A callout points to the 'Cost' field in the 'Receipt Lines' table, which is currently set to '1,015.00'.
- Select when removing line(s):** A callout points to the 'Remove Line' button in the 'Actions' column of the 'Receipt Lines' table.
- Remember: Remove line if service is not performed.** A callout points to the 'Remove Line' button in the 'Actions' column of the 'Receipt Lines' table.


For additional information on receiving please refer to TechBuy Receiving Tutorial found at F&A Work Tools tab > Accounts Payable.

Payment

- Payment will occur once receiving is complete and invoice is received.
- Invoices are created/delivered into TechBuy via three basic methods:
 - cXML Direct from Vendors
 - Vendor Portal Delivery
 - Direct entry by Accounts Payable
- Invoices are matched against the purchase order. When invoices are received in TechBuy they are systematically matched against the order. The matching process checks every single invoice at the line item detail and determines if a price is correct or off-contract. Matched invoices are then posted to Banner for payment. The payment of this invoice will be identified on the general ledger as Banner invoice #V9xxxxxx.
- Although departments are not receiving paper invoices or requests from Accounts Payable to complete receiving for invoices received in TechBuy, receiving must still be completed timely (in TechBuy) for all items received.

Payment

- To view a payment of an invoice in TechBuy, select the invoices tab and click on the Invoice No. (V9XXXXXX) to review the invoice.

 **TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER.**

Documents > Document Search > Search Documents > Invoices - PO P0503416

[Back to Search Results](#) 500 of 10000 Results

PO/Reference No. **P0503416 Revision 0**
Supplier **Summus Staples**

Status Purchase Order Revisions PO Approvals Shipments Receipts **Invoices** Comments Attachments History

Invoicing Summary

























Invoice No	Invoice Date	Due Date
V9446068	10/27/2016	10/28/2016

Invoice Line Details

Line No.	Product Name
1	Pilot Precise V5 RT Rolling Ball Pen Refills, Extra Fine Point, 0.5mm, Black Ink, 2/Pk
2	Pilot Precise V5 Retractable Premium Rolling Ball Pens, Extra Fine Point, 0.5 mm, Black Ink / Gray Barrel, 12/pk
3	Sanford Expo Bright Sticks Wet-Erase Fluorescent Marker Set, Bullet Tip, Assorted Colors, 5/Pk
4	Dixie Pathways 8 1/2" Paper Plates, Design, 125/Pk
5	Sustainable Earth by Staples Napkins, 1-Ply, White, 400/Pk
6	Staples Plastic Forks, Heavy Weight, White, 100/Bx

Payment

- When you click on the invoice number it will pull up the invoice summary. The invoice contains usefull information, such as, pay status, remit to, check number and payment date.

Invoice Number V9446068		Supplier Account No.		Available Actions																																																																																																							
Supplier Invoice No. 3319223604																																																																																																											
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Payment

- The Payment Information section of the Invoice Summary contains a record number. To identify the type of payment received please use the guide below.
- Record number beginning with:
 - A letter indicates a State payment (Pxxxxxxx).
 - The number 66 indicates a local payment (66xxxxxx).
 - A ! Indicates a direct deposit was made (!xxxxxxx).

Questions & Answers

Questions?