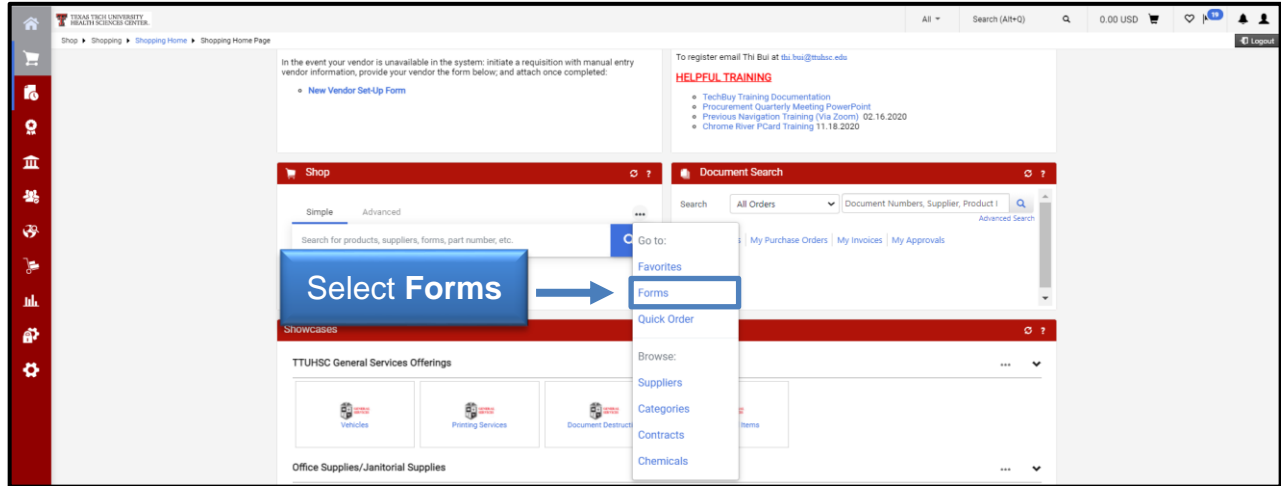




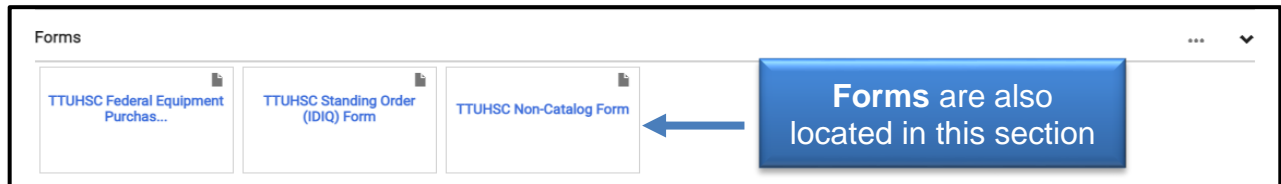
# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

There are four forms in TechBuy that are used to purchase items that do not currently have contract pricing (commonly referred to as non-catalog items). The proper use of each form is explained in this document. It is important to select the correct form. If you have any questions, contact [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).

Forms are found on the TechBuy Shopping Home page in the Shop Search section. Click the **Go to:** ... drop-down menu and select **Forms**.

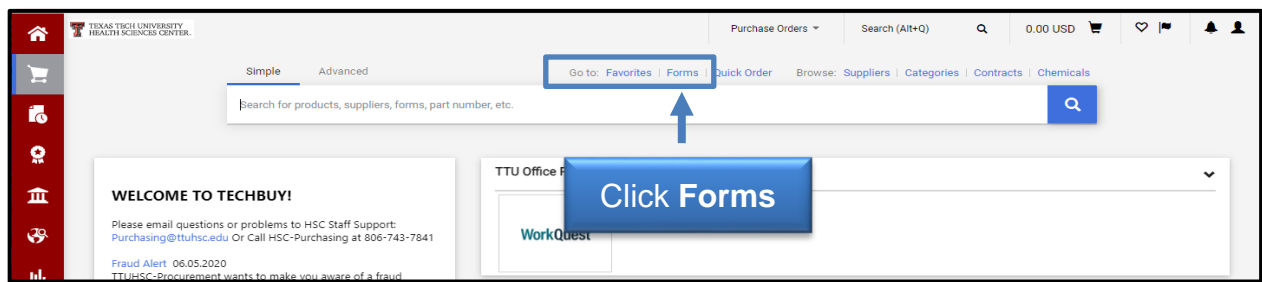


Forms can also be located from the **Forms** link in the **Shop** section below the search.



Another way to easily search for Forms is by navigating to the **Shop** icon and **Shopping**. Under the **Go To** section, click the **New Shopping Experience** link.

The **Go to:** shortcut link provides quick access to **Forms**.



# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

## HSC Non-Catalog Form

The HSC Non-Catalog Form is used to purchase products and services that do not fall under the defined purpose for the Standing Order form, Employee Expense Reimbursement form, or the Federal Equipment Purchase Order Form. The form is typically used for products or services with a fixed price. Non-Catalog form orders will be encumbered in Banner with a document prefix beginning with P (PXXXXXXX). This number will feed back into TechBuy and replace the temporarily assigned TechBuy TB (TBXXXXXX) number.

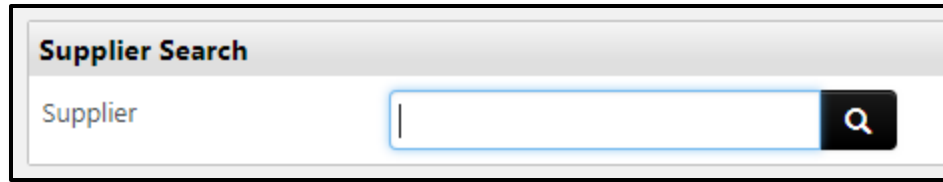
The following section will walk through the form and the necessary information.

The screenshot displays the 'Non-Catalog Form' interface. At the top, the title 'Non-Catalog Form' is on the left, and 'Available Actions: Add and go to Cart' with 'Go' and 'Close' buttons is on the right. The main form area is titled 'Non-Catalog Purchase Form'. It contains several sections: 'Supplier' with an 'Enter Supplier' text box and a link to 'Supplier Search | Enter Manually'; 'Purchase Category' with a dropdown menu; 'Form Type' set to 'HSC Non-Catalog Form'; 'General Item Information' with fields for 'Catalog No.', 'Quantity', 'Packaging (UOM)' (set to 'EA - Each'), and 'Unit Price'; 'Product Description' with a large text area (254 characters remaining) and a link to 'expand | clear'; 'Shipping Information' with radio buttons for 'Shipping Cost Included in Line Item' and 'Shipping is Prepaid and Will Be Added to Invoice'; 'Other Information' with a 'Prior Year PO Number' field and radio buttons for 'Yes' and 'No'; and 'Sole Source or Proprietary Purchase Justification' with a link to 'Sole Source and Propriety Justification Form'. A blue callout box with the text 'Enter the necessary information in the form' is overlaid on the 'Product Description' field.

### Supplier:

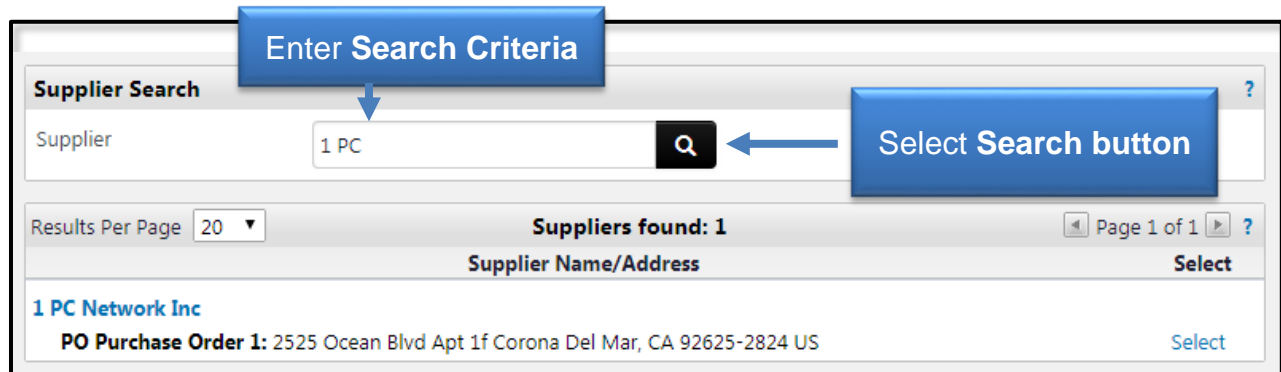
The Supplier field will provide a limited search feature as you type the supplier name or the vendor number. If you cannot locate your supplier from the limited search feature, select the **Supplier Search** option below the Supplier field. The Supplier Search window will open.

## TechBuy – Adding Non-Catalog Items to a Cart (Forms)



A screenshot of the 'Supplier Search' form. It features a text input field labeled 'Supplier' and a magnifying glass icon to its right for searching.

Type the **search criteria** for the vendor in the Supplier field (ex. Enter 1 PC to search for 1 PC Network Inc). Select the **Search** (Magnifying Glass) button.

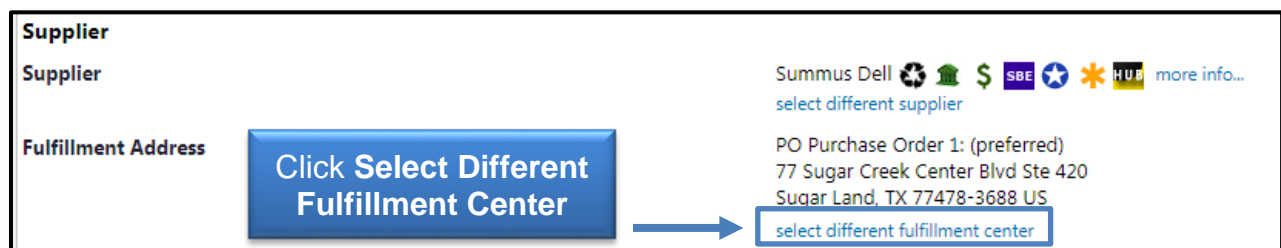


A screenshot of the search results page. A blue box labeled 'Enter Search Criteria' points to the 'Supplier' field which contains '1 PC'. Another blue box labeled 'Select Search button' points to the magnifying glass icon. Below the search bar, it says 'Results Per Page 20' and 'Suppliers found: 1'. A table lists the results with columns 'Supplier Name/Address' and 'Select'. The first result is '1 PC Network Inc' with address 'PO Purchase Order 1: 2525 Ocean Blvd Apt 1f Corona Del Mar, CA 92625-2824 US' and a 'Select' button next to it.

A list with the search results meeting your criteria will appear. If you see the desired vendor, click the **Select** button next to the address. This will bring the information back into the Non-Catalog form.

### Fulfillment Address:

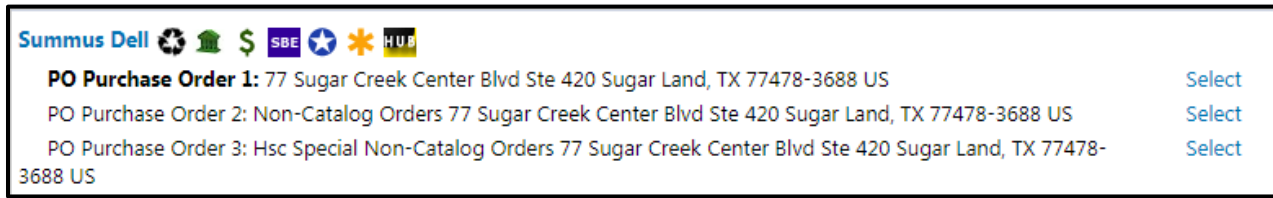
If a vendor is selected through the Supplier Search feature, the Fulfillment Address field will populate with one of the supplier's addresses. If the supplier has multiple addresses in the system, you can view the addresses by clicking **Select Different Fulfillment Center**.








A screenshot of the 'Fulfillment Address' form. It shows the 'Supplier' field populated with 'Summus Dell' and various icons (recycling, SBE, etc.). Below it, the 'Fulfillment Address' field is populated with 'PO Purchase Order 1: (preferred), 77 Sugar Creek Center Blvd Ste 420, Sugar Land, TX 77478-3688 US'. A blue box labeled 'Click Select Different Fulfillment Center' points to a link that says 'select different fulfillment center'.

## TechBuy – Adding Non-Catalog Items to a Cart (Forms)

Select the **appropriate address** based on the vendor quote.

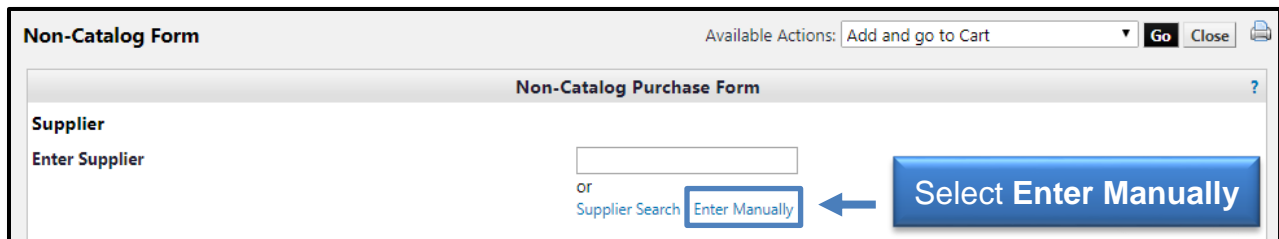


Summus Dell   \$   

PO Purchase Order 1: 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US	Select
PO Purchase Order 2: Non-Catalog Orders 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US	Select
PO Purchase Order 3: Hsc Special Non-Catalog Orders 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US	Select

If you have an address that is not available in the system, you will need to enter the **vendor information** manually. If you do not have a specific address, use the defaulted vendor address.

If the vendor is not listed in the Supplier Search or if the vendor does not have a purchase order address listed, select **Enter Manually** below the Supplier field.



Non-Catalog Form Available Actions: Add and go to Cart Go Close

Non-Catalog Purchase Form ?

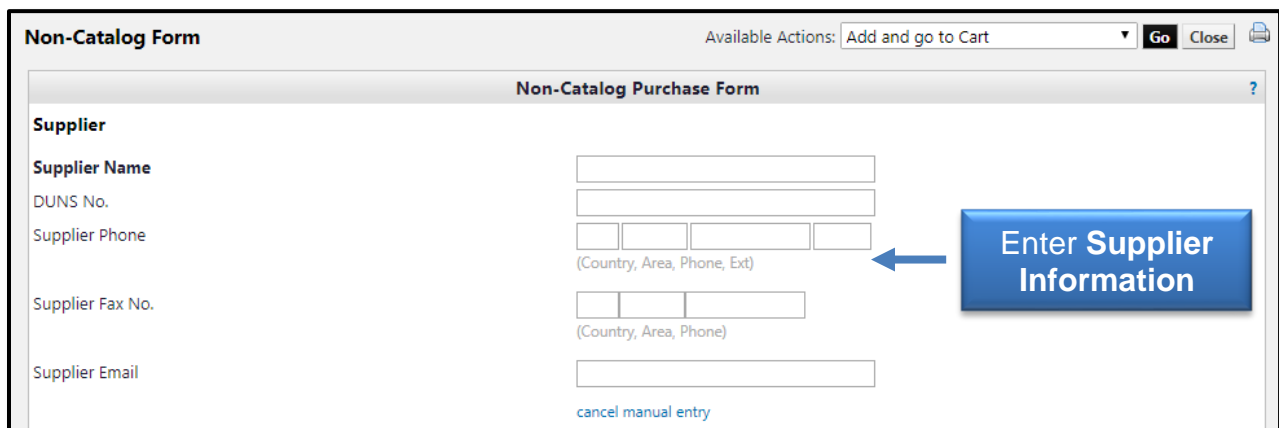
Supplier

Enter Supplier

or  
Supplier Search Enter Manually

Select Enter Manually

This will open additional fields allowing you to type the supplier information. Type in any information you have regarding the supplier.



Non-Catalog Form Available Actions: Add and go to Cart Go Close

Non-Catalog Purchase Form ?

Supplier

Supplier Name

DUNS No.

Supplier Phone

Supplier Fax No.

Supplier Email

cancel manual entry

Enter Supplier Information

**Note:** The address you select must be a purchase order address. If you do not see a purchase order address, you must select **Enter Manually** and enter the correct **PO address**.

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

## Distribution:

Once a supplier is selected, the Distribution method will display. If you need the order distributed to the supplier in a different manner or to a specific representative, select the **Check this box to customize order distribution information.**

The screenshot shows a web form titled "Non-Catalog Form" with a sub-header "Non-Catalog Purchase Form". The form contains several sections: "Supplier" (1 PC Network Inc, select different supplier), "Fulfillment Address" (PO Purchase Order 1: (preferred), 2525 Ocean Blvd Apt 1f, Corona Del Mar, CA 92625-2824 US), "Supplier Phone" (+1 949-965-8499), "Distribution" (The system will distribute purchase orders using the method(s) indicated below:), and "Purchase Category". In the "Distribution" section, there is a checkbox labeled "Check this box to customize order distribution information." which is checked. A blue callout box with white text says "Select Check this box to customize order distribution information" with an arrow pointing to the checkbox. Below the checkbox are three radio button options: "Fax" (checked), "Email (HTML Body)" (unchecked), and "Manual" (checked). The "Available Actions" bar at the top right shows "Add and go to Cart" and "Go" and "Close" buttons.

Select the desired distribution method and enter the appropriate information.

## Purchase Category:

This field is required and will drive future workflow approvals. Select the category of the purchase from the drop-down options.

## Catalog No:

Enter the catalog number if known for the item. This field is not required.

## Quantity:

This field is required and should be the total quantity of the item you are ordering.

## Packaging:

This field is required and has two parts. The first field is the numeric amount of the packaging and the second field is the unit of measure. For ease of use, it is recommended to enter the quantity amount in the first packaging field.

## Unit Price:

This field is required and should be the unit price of the item(s) you are purchasing.

## **Product Description and Specifications/Long Text:**

The Product Description field is required but the Specifications/Long Text is not required. The Product Description field only allows 255 characters and the first 30 characters in this field will populate on the ledgers and the check remittance. The Specifications/Long Text allows for 2000 characters and should be used if you run out of characters in the Product Description field. If you are submitting specifications that will not fit in these fields, you should provide a short description with an annotation that specifications are attached. You should then attach a document of the specifications to the internal attachment field. This field is not sent to the vendor.

## **Shipping Information:**

This field is required and you have two choices: Shipping Cost Included in Line Item and Shipping is Prepaid and Will Be Added to Invoice. This must be answered accurately based on the vendor's quote if it is not going to be competitively bid.

## **Prior Year PO Number:**

This field is only required if the requisition is for services or products that are a continuation or renewal from a previous fiscal year.

## **Independent Contractor Questionnaire (ICQ) Required/Attached:**

This field is required and you have two choices: Yes or No. If the requisition requires an ICQ (services being completed by an individual) , **Yes** will be selected and an ICQ form will need to be attached in the internal notes. Forms with Yes selected will automatically route to Tax Compliance for approval. If an ICQ is not required, **No** will be selected.

## **Proprietary Purchase Justification (If Applicable):**

Responses are required if the purchase is from a sole source provider. This section is required by state and federal law and university policy when the specification requirement limits consideration to one manufacturer, one product, or one service provider and the amount of the purchases exceeds \$15,000. Review HSC OP 72.02, Guidelines for Proprietary Purchase, for procedures concerning proprietary sole source justification.

## **Additional Information:**

Use this box to provide the purchaser or vendor with any additional information you feel would be helpful.

To add additional items to your cart for this vendor select **Add to Cart and Return** from the Available Actions drop down menu.

## TechBuy – Adding Non-Catalog Items to a Cart (Forms)

**Non-Catalog Form**

Available Actions: Add to Cart and Return Go Close

**Non-Catalog Purchase Form**

**Supplier**  
Supplier 1 PC Network Inc. more info...  
select different supplier

**Fulfillment Address**  
PO Purchase Order 1: (preferred)  
2525 Ocean Blvd Apt 1f  
Corona Del Mar, CA 92625-2800

Supplier Phone +1 949-965-8499

**Distribution**  
The system will distribute purchase orders using the method(s) indicated below:  
Check this box to customize order distribution information. ☒

Fax ☒ +1 949-675-9599

Email (HTML Body) ☐

Manual ☒

Select Add to Cart and Return

When you have completed the form, select **Add and go to Cart** from the Available Actions list and select **Go** at the top right corner of the screen. This will place the document and the information into the requisition form.

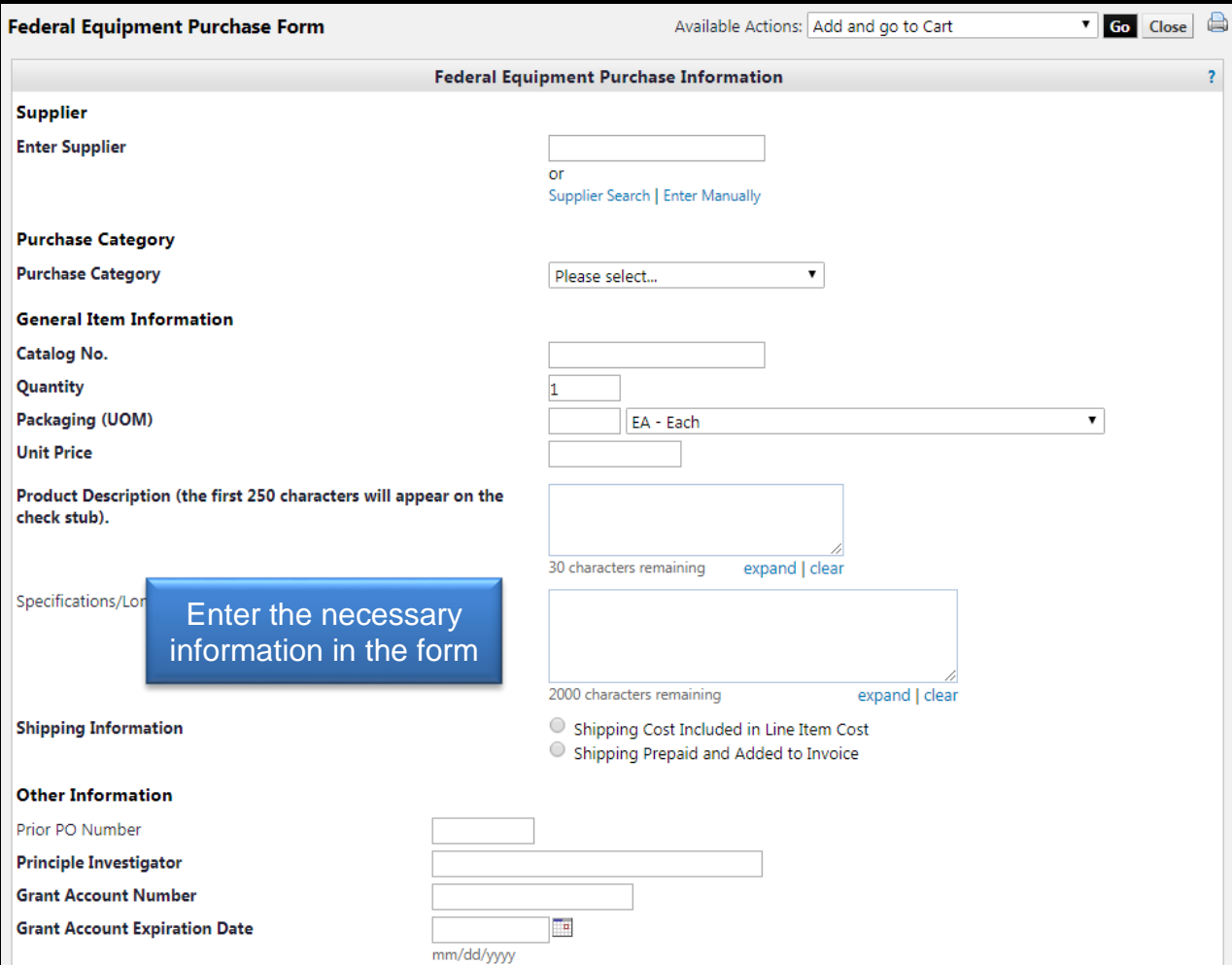
Do not add additional forms for different vendors to the cart.

### HSC Federal Equipment Form

The HSC Federal Equipment Form is required when purchasing capital equipment on federally sponsored projects as outlined in HSC OP 72.04, specifically any purchase over \$5,000 on a federal grant fund (first two characters in fund are 21). This information will automatically route to the Sponsored Programs folder for approval. The HSC Federal Equipment form orders will encumber in Banner with a document prefix beginning with P (PXXXXXXX). This number will feed back into TechBuy and replace the temporarily assigned TechBuy TB (TBXXXXXX) number.

This form is similar to the Non-Catalog form. The following section will walk through the form and necessary information.

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)



The screenshot shows the 'Federal Equipment Purchase Form' with a title bar containing 'Available Actions: Add and go to Cart', 'Go', 'Close', and a printer icon. The form is divided into several sections:

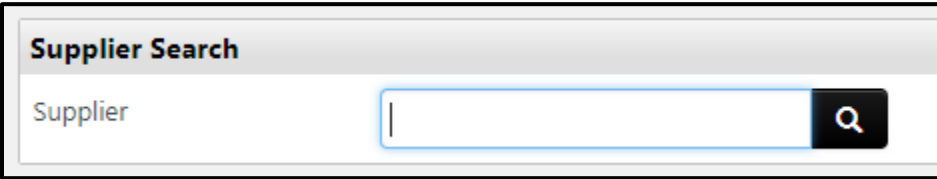
- Federal Equipment Purchase Information**: Includes a 'Supplier' field with a text input and links for 'Supplier Search' and 'Enter Manually'. Below it is a 'Purchase Category' dropdown menu.
- General Item Information**: Includes 'Catalog No.' (text input), 'Quantity' (input with '1'), 'Packaging (UOM)' (dropdown with 'EA - Each'), and 'Unit Price' (text input).
- Product Description**: A large text area with a note that the first 250 characters will appear on the check stub. It shows '30 characters remaining' and 'expand | clear' links.
- Specifications/Long Description**: Another large text area showing '2000 characters remaining' and 'expand | clear' links.
- Shipping Information**: Includes two radio button options: 'Shipping Cost Included in Line Item Cost' and 'Shipping Prepaid and Added to Invoice'.
- Other Information**: Includes 'Prior PO Number' (text input), 'Principle Investigator' (text input), 'Grant Account Number' (text input), and 'Grant Account Expiration Date' (calendar icon) with a format hint 'mm/dd/yyyy'.

A blue callout box with the text 'Enter the necessary information in the form' is overlaid on the left side of the form.

## Supplier:

The Supplier field will provide a limited search feature as you type the supplier name or the vendor number. If you cannot locate your supplier from the limited search feature, select the **Supplier Search** option below the Supplier field.

The Supplier Search window will open.



The screenshot shows the 'Supplier Search' window. It has a title bar with the text 'Supplier Search'. Below the title bar is a search input field with the placeholder text 'Supplier' and a magnifying glass icon on the right.



## TechBuy – Adding Non-Catalog Items to a Cart (Forms)

Type the **search criteria** for the vendor in the Supplier field. (Example: Enter 1 PC to search for 1 PC Network Inc). Select the **Search** (Magnifying Glass) button.

The screenshot shows the 'Supplier Search' form. A blue box labeled 'Enter Search Criteria' has an arrow pointing to the 'Supplier' input field, which contains the text '1 PC'. Another blue box labeled 'Select Search button' has an arrow pointing to the magnifying glass search button. Below the search bar, the results show 'Suppliers found: 1' and 'Page 1 of 1'. The search results table has columns 'Supplier Name/Address' and 'Select'. The first result is '1 PC Network Inc' with address 'PO Purchase Order 1: 2525 Ocean Blvd Apt 1f Corona Del Mar, CA 92625-2824 US' and a 'Select' button.

A list with the search results meeting your criteria will appear. If you see the desired vendor, click the red **Select** button next to the address. This will bring the information back into the form.

### Fulfillment Address:

If a vendor is selected through the Supplier Search feature, the Fulfillment Address field will populate with one of the supplier's addresses. If the supplier has multiple addresses in the system, you can view the addresses by selecting **Select Different Fulfillment Center**.

The screenshot shows the 'Fulfillment Address' field. A blue box labeled 'Click Select Different Fulfillment Center' has an arrow pointing to a button labeled 'select different fulfillment center'. To the right of the field, the supplier 'Summus Dell' is listed with various icons (recycling, green building, dollar sign, SBE, star, asterisk, HUB) and a 'more info...' link. Below this, the address 'PO Purchase Order 1: (preferred) 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US' is displayed.

Select the **appropriate address** based on the vendor quote.

The screenshot shows a list of addresses for 'Summus Dell' with various icons. The list includes three entries, each with a 'Select' button: 'PO Purchase Order 1: 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US', 'PO Purchase Order 2: Non-Catalog Orders 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US', and 'PO Purchase Order 3: Hsc Special Non-Catalog Orders 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US'.

If you have an address that is not available in the system, you will need to enter the **vendor information** manually. If you do not have a specific address, use the defaulted vendor address.

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

If the vendor is not listed in the supplier search or if the vendor does not have a purchase order address listed, select **Enter Manually** below the Supplier field.

The screenshot shows the 'Federal Equipment Purchase Form' with the 'Federal Equipment Purchase Information' section. Under the 'Supplier' heading, there is a text input field labeled 'Enter Supplier'. Below this field, the text 'or Supplier Search' is followed by a button labeled 'Enter Manually'. A blue callout box with the text 'Select Enter Manually' and an arrow points to the 'Enter Manually' button. The top right of the form shows 'Available Actions: Add and go to Cart' with 'Go' and 'Close' buttons.

This will open additional fields allowing you to type the supplier information. Fill in any information you have regarding the supplier.

The screenshot shows the 'Federal Equipment Purchase Form' with the 'Federal Equipment Purchase Information' section. Under the 'Supplier' heading, there are several input fields: 'Supplier Name', 'DUNS No.', 'Supplier Phone' (with a sub-label '(Country, Area, Phone, Ext)'), 'Supplier Fax No.' (with a sub-label '(Country, Area, Phone)'), and 'Supplier Email'. A blue callout box with the text 'Enter Supplier Information' and an arrow points to the 'Supplier Name' field. At the bottom of the form, there is a link labeled 'cancel manual entry'. The top right of the form shows 'Available Actions: Add and go to Cart' with 'Go' and 'Close' buttons.

**Note:** The address you select must be a purchase order address. If you do not see a purchase order address, you must select **Enter Manually** and enter the correct **PO address**.

## Distribution:

Once a supplier is selected, the distribution method will display. If you need the order distributed to the supplier in a different manner or to a specific representative, select the **Check this box to customize order distribution information**.

The screenshot shows the 'Federal Equipment Purchase Form' with the 'Federal Equipment Purchase Information' section. Under the 'Supplier' heading, the supplier name is '1 PC Network Inc' with a link 'more info...' and 'select different supplier'. Under the 'Fulfillment Address' heading, the address is 'PO Purchase Order 1: (preferred), 2525 Ocean Blvd Apt 1f, Corona Del Mar, CA 92625-2824 US, +1 949-965-8499'. Under the 'Distribution' heading, there is a checkbox labeled 'Check this box to customize order distribution information.' which is checked. A blue callout box with the text 'Select Check this box to customize order distribution information' and an arrow points to the checkbox. Below the checkbox, there are three radio buttons: 'Fax' (checked), 'Email (HTML Body)', and 'Manual'. The top right of the form shows 'Available Actions: Add and go to Cart' with 'Go' and 'Close' buttons.

## TechBuy – Adding Non-Catalog Items to a Cart (Forms)

Select the desired distribution method and enter the appropriate information.

### **Purchase Category:**

This field is required and will drive future workflow approvals. Select the category of the purchase from the drop-down options.

### **Catalog No:**

Enter the catalog number if known for the item. This field is not required.

### **Quantity:**

This field is required and should be the total quantity of the item you are ordering.

### **Packaging:**

This field is required and has two parts. The first field is the numeric amount of the packaging and the second field is the unit of measure. For ease of use, it is recommended to enter the quantity amount in the first packaging field.

### **Unit Price:**

This field is required and should be the unit price of the item(s) you are purchasing.

### **Product Description:**

This field is required and allows for 2000 characters. The first 30 characters in this field will populate on the ledgers and the check remittance. If you are submitting specifications that will not fit in this field, you should provide a short description with an annotation that specifications are attached. You should then attach a document of the specifications to the internal attachment field.

### **Shipping Information:**

This field is required and you have two choices: Shipping Cost Included in Line Item and Shipping is Prepaid and Will Be Added to Invoice. This must be answered accurately based on the vendor's quote.

### **Prior Year PO Number:**

This field is only required if the requisition is for services or products that are a continuation or renewal from a previous fiscal year.

## TechBuy – Adding Non-Catalog Items to a Cart (Forms)

### **Principal Investigator:**

This field is required and you should enter the name of the Principal Investigator.

### **Grant Account Number:**

This field is required. Enter the Grant that will be used to fund the purchase.

### **Grant Account Expiration Date:**

This field is required. Enter the expiration date for the grant in mm/dd/yyyy format.

### **Research Project Name:**

This field is required. Enter the research project name.

### **Authority to Procure Equipment in Final 60 Days of Grant:**

This field is only required if the purchase is within 60 days of the grant expiration date. If there are more than 60 days remaining before the grant expires, this field is not required.

### **Ownership:**

This is a required field. Select one of the following options:

- Federal
- Private
- State/ Other Agency
- TTU/HSC

### **Grant does not specifically authorize purchase of equipment:**

Provide documentation if a grant does not specifically authorize the purchase of federal equipment.

### **Authorization:**

Mark the appropriate field: the Grant authorizes the purchase of equipment, or the Grant authorizes the fabrication of equipment.

### **Additional Information / Comments:**

Enter any general information or additional comments that may be useful to the approval process.

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

## Proprietary Purchase Justification (If Applicable):

Responses are required if the purchase is from a sole source provider. This section is required by state and federal law and university policy when the specification requirement limits consideration to one manufacturer, one product, or one service provider and the amount of the purchases exceeds \$15,000. Review HSC OP 72.02, Guidelines for Proprietary Purchase, for procedures concerning proprietary sole source justification.

## Additional Information:

Use this box to provide the purchaser or vendor with any additional information you feel would be helpful. When you have completed the form, select **Add and go to Cart** from the Available Actions list and select **Go** at the top right corner of the screen. This will place the document and the information into the requisition form.

Do not add additional forms for different vendors to the requisition form.

## HSC Standing (IDIQ) Order

This form is to establish a single purchase order for items or services that will be ordering indefinite delivery or indefinite quantity (IDIQ). TechBuy will assign a document prefix beginning with TB. It will be fed to Banner as a PO and the TB number will be replaced within TechBuy.

The following section will walk through the form and the necessary information.

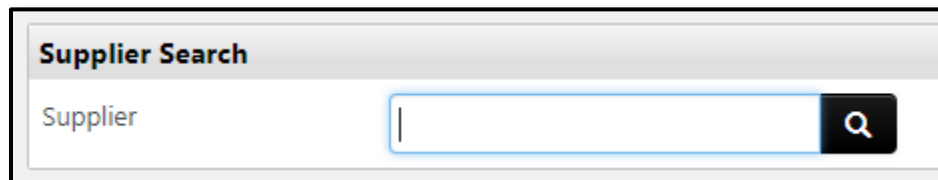
The screenshot displays the 'TTUHSC Standing Order (IDIQ) Form' interface. At the top, the title 'TTUHSC Standing Order (IDIQ) Form' is centered. To the right, the 'Available Actions' dropdown menu is set to 'Add and go to Cart', with 'Go' and 'Close' buttons. The form is divided into two main columns. The left column contains 'Instructions' and 'Ordering and Invoice Instructions'. The right column contains the form fields. The form fields are organized into sections: 'Enter Supplier' (with a text input field and a 'Supplier Search | Enter Manually' link), 'Purchase Category' (with a 'Please select...' dropdown), 'General Item Information' (with fields for 'Catalog No.', 'Quantity', 'Packaging (UOM)' (set to 'EA - Each'), and 'Unit Price'), 'Product Description' (with a large text area and a '254 characters remaining' indicator), 'Ordering and Invoicing Instructions' (with a large text area and a '2000 characters remaining' indicator), and 'Shipping Information' (with two radio buttons: 'Shipping Cost Included in Line Item' and 'Shipping is Prepaid and Will Be Added to Invoice').

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

## Supplier:

The Supplier field will provide a limited search feature as you type the supplier name or the vendor number. If you cannot locate your supplier from the limited search feature, select the **Supplier Search** option below the Supplier field.

The Supplier Search window will open.

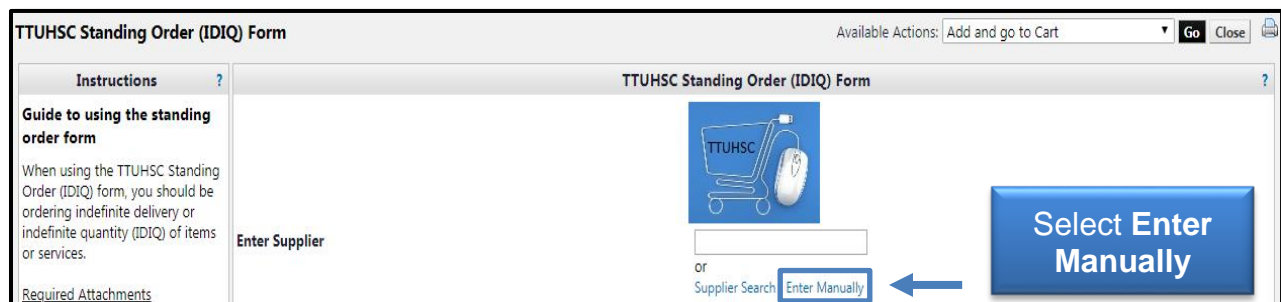
A screenshot of the 'Supplier Search' form. It features a title bar 'Supplier Search' and a text input field labeled 'Supplier'. A magnifying glass icon is positioned to the right of the input field.

Type the **search criteria** for the Vendor in the Supplier field. (Example: Enter 1 PC to search for 1 PC Network Inc). Select the **Search** (Magnifying glass) button.

A screenshot of the 'Supplier Search' results window. A blue callout box labeled 'Enter Search Criteria' points to the 'Supplier' field which contains '1 PC'. Another blue callout box labeled 'Select Search button' points to the magnifying glass icon. Below the search bar, it shows 'Results Per Page' set to 20, 'Suppliers found: 1', and 'Page 1 of 1'. A table lists the results with columns 'Supplier Name/Address' and 'Select'. The first entry is '1 PC Network Inc' with address 'PO Purchase Order 1: 2525 Ocean Blvd Apt 1f Corona Del Mar, CA 92625-2824 US' and a 'Select' button.

A list with the search results meeting your criteria will appear. If you see the desired vendor, click the **Select** button next to the address. This will bring the information back into the form.

If the vendor is not listed in the Supplier Search or if the vendor does not have a purchase order address listed, select **Enter Manually** below the Supplier field.

A screenshot of the 'TTUHSC Standing Order (IDIQ) Form'. On the left is a sidebar with 'Instructions' and 'Required Attachments'. The main area has a title bar 'TTUHSC Standing Order (IDIQ) Form' and a 'Guide to using the standing order form'. Below the guide is a 'Supplier Search' section with a text input field and a magnifying glass icon. A blue callout box labeled 'Select Enter Manually' points to the 'Enter Manually' link below the search field. The top right of the form shows 'Available Actions: Add and go to Cart' with 'Go' and 'Close' buttons.

## TechBuy – Adding Non-Catalog Items to a Cart (Forms)

This will open additional fields allowing you to type the supplier information. Type in any information you have regarding the supplier.

TTUHSC Standing Order (IDIQ) Form

Available Actions: Add and go to Cart Go Close

**Instructions** ?

**Guide to using the standing order form**

When using the TTUHSC Standing Order (IDIQ) form, you should be ordering indefinite delivery or indefinite quantity (IDIQ) of items or services.

[Required Attachments](#)  
> Quote

**Supplier Name**

DUNS No.

Supplier Phone

(Country, Area, Phone, Ext)

Supplier Fax No.

(Country, Area, Phone)

Supplier Email

cancel manual entry

**Enter Supplier Information**

**Note:** The address you select must be a purchase order address. If you do not see a purchase order address, you must select **Enter Manually** and enter the correct **PO address**.

### Fulfillment Address:

If a vendor is selected through the Supplier Search feature, the Fulfillment Address field will populate with one of the supplier's addresses. If the supplier has multiple addresses in the system, you can view the addresses by clicking **Select Different Fulfillment Center**.

**Supplier**

Supplier

Summus Dell more info...  
[select different supplier](#)

**Fulfillment Address**

PO Purchase Order 1: (preferred)  
77 Sugar Creek Center Blvd Ste 420  
Sugar Land, TX 77478-3688 US  
[select different fulfillment center](#)

**Click Select Different Fulfillment Center**

Select the **appropriate address** based on the vendor quote.

Summus Dell

**PO Purchase Order 1:** 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US [Select](#)

**PO Purchase Order 2:** Non-Catalog Orders 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US [Select](#)

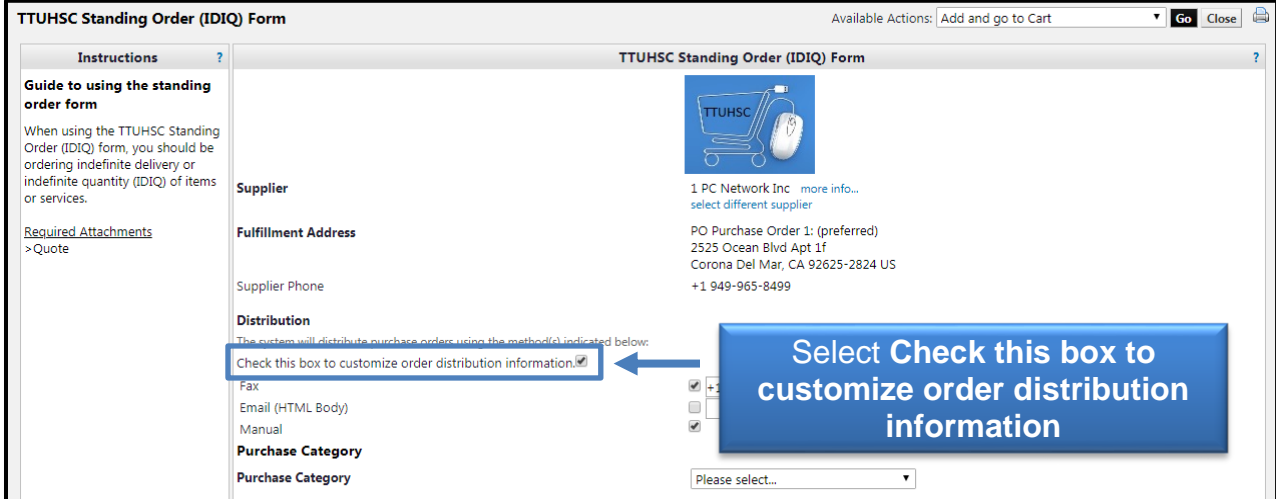
**PO Purchase Order 3:** Hsc Special Non-Catalog Orders 77 Sugar Creek Center Blvd Ste 420 Sugar Land, TX 77478-3688 US [Select](#)

If you have an address that is not available in the system, you will need to enter the **vendor information** manually. If you do not have a specific address, use the defaulted vendor address.

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

## Distribution:

Once a supplier is selected, the Distribution method will display. If you need the order distributed to the supplier in a different manner or to a specific representative, select the **Check this box to customize order distribution information.**



The screenshot shows the 'TTUHSC Standing Order (IDIQ) Form' with a sidebar on the left containing 'Instructions' and 'Required Attachments'. The main content area is titled 'TTUHSC Standing Order (IDIQ) Form' and displays supplier information for '1 PC Network Inc.' and a 'PO Purchase Order 1: (preferred)'. The 'Distribution' section is highlighted, showing a checkbox labeled 'Check this box to customize order distribution information.' which is checked. A blue callout box with an arrow points to this checkbox, containing the text 'Select Check this box to customize order distribution information'. Below the checkbox are options for 'Fax', 'Email (HTML Body)', and 'Manual'. The 'Purchase Category' field is at the bottom with a dropdown menu.

Select the desired distribution method and the appropriate information.

## Purchase Category:

This field is required and will drive future workflow approvals. Select the category of the purchase from the drop-down options.

## Catalog No:

Enter the catalog number if known for the item. This field is not required.

## Quantity:

This field is required and should be the total quantity of the item you are ordering.

## Packaging:

This field is required and has two parts. The first field is the numeric amount of the packaging and the second field is the unit of measure. For ease of use, it is recommended to enter the quantity amount in the first packaging field.

## Unit Price:

This field is required and should be the unit price of the item(s) you are purchasing.



## **Product Description:**

This field is required and allows for 2000 characters. The first 30 characters in this field will populate on the ledgers and the check remittance. If you are submitting specifications that will not fit in this field, you should provide a short description with an annotation that specifications are attached. You should then attach a document of the specifications to the internal attachment field.

## **Ordering and Invoicing Instructions:**

This field is required and allows for 2000 characters. Provide a very descriptive explanation on how you will place orders and how you will be invoiced. This section is to verify that a standing order is needed. If this is a one-time purchase the requisition will be returned to process on the correct form.

## **Shipping Information:**

This field is required and you have two choices: Shipping Cost Included in Line Item and Shipping is Prepaid and Will Be Added to Invoice. This must be answered accurately based on the vendor's quote.

## **Prior Year PO Number:**

This field is required if the requisition is for services or products that are a continuation or renewal from a previous fiscal year.

## **Proprietary Purchase Justification (If Applicable):**

Responses are required if the purchase is from a sole source provider. This section is required by state and federal law and university policy when the specification requirement limits consideration to one manufacturer, one product, or one service provider and the amount of the purchases exceeds \$15,000. Review HSC OP 72.02, Guidelines for Proprietary Purchase, for procedures concerning proprietary sole source justification.

## **Additional Information:**

Use this box to provide the purchaser or vendor with any additional information you feel would be helpful.

To add additional items to your cart for this vendor select **Add to Cart and Return** from the Available Actions drop down menu.

# TechBuy – Adding Non-Catalog Items to a Cart (Forms)

The screenshot shows the 'TTUHSC Standing Order (IDIQ) Form' interface. On the left is an 'Instructions' sidebar. The main form area contains fields for 'Supplier', 'Fulfillment Address', 'Supplier Phone', 'Distribution' (with checkboxes for Fax, Email, and Manual), and 'Purchase Category'. A callout box with the text 'Select Add to Cart and Return' has an arrow pointing to the 'Add to Cart and Return' option in the 'Available Actions' dropdown menu at the top right of the form.

When you have completed the form, select **Add and go to Cart** from the Available Actions list and select **Go** at the top right corner of the screen. This will place the document and the information into the requisition form.

Do not add additional forms for different vendors to the requisition form.

## HSC Employee Reimbursement

Use the HSC Direct Pay Form – TTUHSC Employee Reimbursement. For questions or comments, contact Accounts Payable at [Accounts.Payable@ttuhsc.edu](mailto:Accounts.Payable@ttuhsc.edu).