Once you have the items you wish to add to your requisition in the active cart, you are ready to review. During the cart review, you can edit the shipping address, edit the fulfillment address, name your cart, verify the accounting date, enter accounting information, and include any external or internal notes and attachments. Because of the depth of information, documentation for entering accounting information and adding notes or attachments is located in separate chapters.

To access the cart review, select **Shop, Shopping, Open My Active Shopping Cart**, and select **Proceed to Checkout**.

The cart checkout navigation bar allows you to identify where you are in the checkout process and identifies the required sections to complete or edit in order to checkout. The checkout navigation bar contains the following sections: General, Shipping, Billing, Line and Header FOAP Summary, Internal Notes and Attachments, External Notes and Attachments, and Final Review. The sections lacking a green checkmark must be corrected and the red exclamation point will be replaced by a green checkmark when errors have been corrected. All checkout navigation bar icons must have green checkmarks before the cart can be submitted. You can Assign Cart without correcting the errors.
General Information Section

To edit the General information block, select **Required Field** in the top yellow message box or the message box in the corresponding section. You may also select **Edit** to update the section information.

The General information block contains the following fields:

- **Cart Name** – This field automatically populates with the current date, the user id, and a sequential number. TechBuy allows you to rename your cart. Many users find renaming the cart with specific information (date, vendor, items, etc) provides an easier means for tracking orders and searching history.
- **Description** – This field allows you to enter additional information for future reference.
- **Priority** – If urgent is selected, the order is flagged in the system. Please only mark truly urgent orders. If all orders are marked as urgent, the flag will no longer have its intended significance.
- **Prepared by** – This field will identify the user who prepared the cart. This field cannot be modified.
- **Prepared for** – If a cart has been assigned to you for completion, you will need to identify yourself in this field. TechBuy sends the name of the person in the Prepared for field to Banner to verify fund security.
- **Principal Investigator** – This field may be required for some grant purchases. If your purchase will not use grant funds, a name is not necessary in this field.
- **Texas Smart Buy PO #** – Purchase Order generated by the state for Term Contract orders. This field will be edited by Purchasing.

When you have edited the General information block, select the **Save** icon.
In this example of the General information block, the Cart Name is the Required Field that is incomplete. Once you have completed the necessary field(s), the error list will clear for the section, the General icon will change to a green checkmark and a message box will direct you to the next section, Shipping, or the Final Review. If you choose, you can manage the entire error list for all checkout sections from the Final Review section.

To proceed to the next section, click the **Shipping** button.

**Note:** For training purposes, the same navigation process as in the example above will be followed by the user for each of the remaining checkout sections.
Shipping Information Section

The Shipping information block has two sections titled: Ship To and Delivery Options.

**Note:** If you have access to shop with Henry Schein, you will have a third section titled Cardinal Account Code. Please review the Henry Schein Purchases chapter for information on populating this field.

The Ship To field should populate automatically based upon your profile settings. If a ship to code does not automatically populate, please refer to the TechBuy User Profile chapter. Failure to enter a ship to code and save as default could result in an error.

To edit the Ship To in the Shipping information block, select **Required Field** in the top yellow message box or the message box in the corresponding section. You may also select **Edit** to update the information.

This will open an additional window that will allow you to select from three options:

- **Edit Current Shipping Address…** - allows you to edit the current address on the document.
- **Or Choose From Your Addresses…** - you can select an address from your personal list of profile addresses (this section is hidden if you do not have addresses in your profile).
- **Or Select a New Address…** - allows you to select an address from TTUHSC’s list of available addresses.
Reviewing the Cart

Edit current shipping address...

Fields in bold are required for checkout.

Contact Name: Lora Turpin
Phone: +1 806-743-7392
Email: LORA.TURPIN@ttuhsc.edu
Address Line 1: Tx Tech Univ HSC
Address Line 2: 3601 4TH ST
Rm/STOP: 
City: LUBBOCK
State: TX
Zip Code: 79430
Country: United States

☐ Save this address for future use

Save Changes  Cancel

Or choose from your addresses...

🌟 HLU002
Lora Turpin
+1 806-743-7392
LORA.TURPIN@ttuhsc.edu
Tx Tech Univ HSC
3601 4TH ST
STOP 9021
LUBBOCK, TX 79430
United States

Use  Edit  Delete

Your current default address

Or select a new address...

You can search by address nickname or use the address text field to search for any part of the address (e.g. street, building name, city).

Nickname / Address Text
Results Per Page 10
Search
In the Edit Current Shipping Address… section, you can edit the current Shipping Address, verify or correct the Contact Name, Phone, Email and Rm/Building. When you have completed editing the information, select Save Changes.

You can optionally save this change as a new address in your personal list of addresses by selecting the checkbox titled Save This Address for Future Use. An additional window titled, Name This Address, allows you to enter a name for future reference.

You can return to the cart without making changes by selecting Cancel or by selecting Return to Checkout.

In the Or Choose From Your Addresses… section, your default address is displayed in the top left portion. It is noted with a star icon and has the message Your Current
Default Address below it. Fields that are required for checkout are displayed in bold. Optional fields are displayed in normal font.

You have access to three buttons on the address selection screen: Use, Edit and Delete. You can select and add an address to the cart by selecting Use. If you need to make a change to an address before using it, select Edit. This will open an Edit Address window that will allow you to make changes to the address before applying it to the cart.

After making the necessary changes you can select the appropriate button: **Use and Don’t Save**, **Use and Save**, **Save Only** or **Cancel**, to choose whether you want this change saved to your profile as part of this process.
You can also remove an address from your profile that is no longer used by selecting **Delete**. You must confirm this action by selecting **OK** in a new pop-up window.

You can also update your default address by selecting the **Make This Your Default** link located beneath the address. The new default address is temporarily highlighted yellow on the screen. You can add the new default address to the document by selecting **Use**.
The new default address now appears as the Ship To address.

![Image of the Shipping page]

**Note:** If you cannot locate the correct shipping address from the TechBuy list, please contact purchasing@ttuhsc.edu.

In the Or Select a New Address… section, you have the option to search and select from TTUHSC’s list of available addresses. You can enter search criteria or simply select the Search button to bring in all the shipping addresses. By selecting the Search button (using no search criteria): selecting the Search button returned 19 pages with addresses in alphabetical order across three columns.

![Image of the Or Select a New Address... screen]

You can select Use to the left of any address to apply it to the cart. This will open a new window titled Selected Address Details to allow for editing if needed, or to add the address to your profile by selecting Save This Address for Future Use. An additional window titled Name This Address allows you to enter a name for future reference. You
can also make this address the default address by selecting **Check This Box to Make This the Default Address in the Future**.

When you have completed all entries, select the **Use** button to apply this address to the cart.

The new address now appears as the **Ship To** address.
**Nickname/Address:** a search using the address nickname HLU as the criteria in the Nickname/Address returned 2 pages with 17 addresses in alphabetical order across three columns.

Select **Use** to apply the address to the cart. Follow the same directions as in the Search example above.

**Nickname/Address:** search using a “%” as a wildcard (%001). This search returned any address that ended in 001 and resulted in 4 pages in alphabetical order across three columns.
**Delivery Options**: To edit the Delivery Options information, select **Edit**.

![Delivery Options Interface]

- **Expedite**: Use this checkbox to flag an item as a rush item. If expedite is selected, the order is flagged in the system. Please only mark truly urgent orders. If all orders are marked as urgent, the flag will no longer have its intended significance.

- **Ship Via**: The Ship Via is a list of shipping methods that you can select from.

- **Req Delivery**: Use this field to indicate a requested delivery date to be sent to the supplier. This is not a firm shipping date from the supplier.

Complete each field as appropriate for this request. Select **Save** when completed.
Billing Information Section

The Billing information block has two vital sections titled Bill To and Billing Options. Each of these fields is required and need special attention. The Credit Card Info is available for select vendors only.

The Bill To should populate automatically based on your profile settings. If TTUHSC Payables does not automatically populate, please refer to the TechBuy User Profile document. Failure to enter a bill to code and save as default could result in an error.

The Billing Options field requires the Accounting Date. The Accounting Date feeds into Banner as the transaction date and drives the fiscal period. It is important to enter the date within an open accounting period unless instructed otherwise by Purchasing.

To edit the Bill To or the Billing Options in the Billing information block, select **Required Field** in the top yellow message box or the message box in the corresponding section. You may also select **Edit** to update the information.

Please enter the **current date** unless instructed otherwise by Purchasing and click the **Save** icon.

**Note:** You may unknowingly add items to an empty cart that was activated previously; your accounting date should reflect the current date.
Fulfillment Address

Each vendor record populates a fulfillment address in the body of the cart. The fulfillment address directs the requisition to the correct processing center. When you complete a purchase requisition using a non-catalog form or standing order form, you select the fulfillment address during the vendor selection process. Hosted, Science, and Punch-out orders will have a default fulfillment address. Some vendors will allow you to edit the fulfillment address on the cart. If the edit button is visible, you should review the available options.

If an HSC fulfillment address is available, you should select it from the list. If no HSC fulfillment address is available, use the default fulfillment address, unless instructed otherwise by Purchasing or a representative of the supplier.

Select the Save icon when you have the appropriate Fulfillment Address populated.
Recurring Payment and Advanced Pay

You have the opportunity to mark an order as Recurring Payment or Advanced Pay. On the Review screen of your cart, scroll to the Supplier / Line Item Details and select Edit on the right of the line item.

The Edit Line window will open.

If the Advanced Pay box is selected and approved by Purchasing, Payment Services will receive an email notification with the information to create a payment. Advanced payments should only be requested when there is a specific business advantage to the institution.

Select the Recurring Payment box if you would like a payment to process automatically on a schedule each month. If the Recurring Payment box is selected and approved by Purchasing, Payment Services will receive an email notification with this information to schedule the payments.

Please enter any justification or additional information in the Internal Notes section. Once you have marked the appropriate options, select Save.
PR Approvals Tab

The PR Approvals tab displays the requisition workflow processes necessary before a PO is created. The number of workflow steps will be dependent upon many factors including the total value of the requisition, items requested, and departmental policies.

To view the workflow steps required for a specific requisition, select the PR Approvals tab.

A workflow diagram will visually display each step the requisition will take before producing a purchase order. The Budget Authorization step sends the FOAP information to Banner for budget checking. The View Approvers link at the bottom of each workflow step lists authorized approvers.
PO Preview Tab

Once a requisition flows through the entire workflow process and receives the proper approvals, a PO is automatically created and sent to the vendor electronically. The PO Preview tab allows you to see what information will be sent to the vendors.

To access the PO Preview, select the **PO Preview** tab from the workflow diagram. A preview of each purchase order by vendor will display.