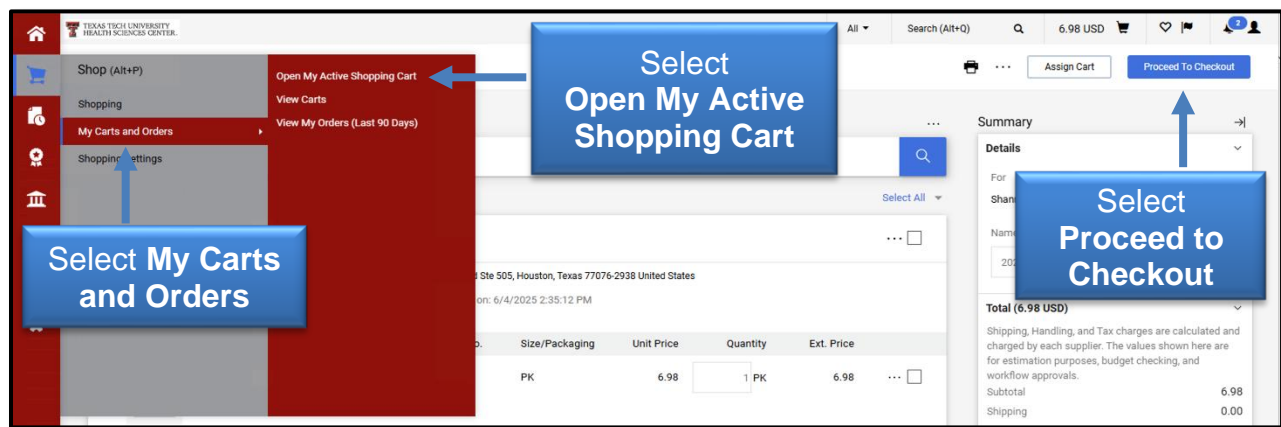




Once the items you wish to add to your requisition are in the active cart, you are ready to review. During the cart review, you can edit the shipping address, edit the fulfillment address, name the cart, verify the accounting date, enter accounting information, and include any external or internal notes and attachments.

Documentation for entering accounting information and adding notes or attachments is located in another training document.

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



The checkout page is a mirror of what the requisition will look like once submitted. The sections are expandable/collapsible. The shipping and billing information will automatically populate from your user profile.

Some of the sections included on the checkout page include:

- General
- Shipping
- Billing
- Line and Header FOAP Summary
- Internal Notes and Attachments
- External Notes and Attachments

If any of the sections have issues, select an **issue** from the list that needs to be addressed in the message box or a specific corresponding section. The cart cannot be submitted for requisition until all errors are corrected, but you can **Assign Cart** without correcting the errors.

# TechBuy – Reviewing the Cart

**Expandable/Collapsible Sections**

**Click Issue**

Requisition • 4299228

Summary | Taxes/S&H | PO Preview | Comments

**Line and Header FOAP Summary**

Chart	Fund	Organization	Account	Program	Activity
no value	no value	no value	no value	no value	no value
Required	Required	Required	Required	Required	Required

1 Item

Possible Missions • 1 Item • 6.98 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 6/4/2025 2:35:12 PM

- GLVS NITRLAQ 9BOX PF LG 100/PK

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	GLVS NITRLAQ 9BOX PF LG 100/PK	19423040	PK	6.98	1 PK	6.98

**Summary**

**Draft**

**Correct these issues.**  
You are unable to proceed until addressed.

- Required: Accounting Date
- Required: Chart
- Required: Fund
- Required: Organization
- Required: Account
- Required: Program

**Total (6.98 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.

If you want to view specific information, select the **eye icon** at the top of the screen to reveal the Filter View menu to select **View Line Items Only**.

**Line Items Only**

**Select Eye Icon**

**Click View Line Items Only**

Requisition •

Summary | History

1 Item

Possible Missions • 1 Item • 8.57 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 6/4/2025

- FB BLACK NITRILE EXAM GLV S

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	FB BLACK NITRILE EXAM GLV S	19181603	PK	8.57	1 PK	8.57

**Filter View**

- View All
- ☒ View Line Items Only
- View Shipping Only
- View Billing Only
- View Line and Header FOAP Summary Only

**Summary**

**Draft**

**Correct these issues.**  
You are unable to proceed until addressed.

- Required: Accounting Date
- Required: Fund
- Required: Organization
- Required: Account
- Required: Program

**Total (8.57 USD)**

Select the **Actions** menu to view available tasks for selected line items.

**Select Actions Menu**

**Select Option**

Requisition • 164438129

Summary | PO Preview | Comments | Attachments | History

1 Item

Possible Missions • 1 Item • 8.57 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 6/4/2025 4:04:46 PM

- FB BLACK NITRILE EXAM GLV S

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	FB BLACK NITRILE EXAM GLV S	19181603	PK	8.57	1 PK	8.57

**Override**

- Ship To
- Delivery Options
- Bill To
- Funding Information
- Remove
- Requires Sourcing
- Remove Requires Sourcing
- Add to Favorites
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO

# TechBuy – Reviewing the Cart

## General Section

To edit the General section, select an **item** from the **correct these issues** list in the message box or in the corresponding section. You can also select **Edit** ✎ to update the section information, if available in the Summary area.

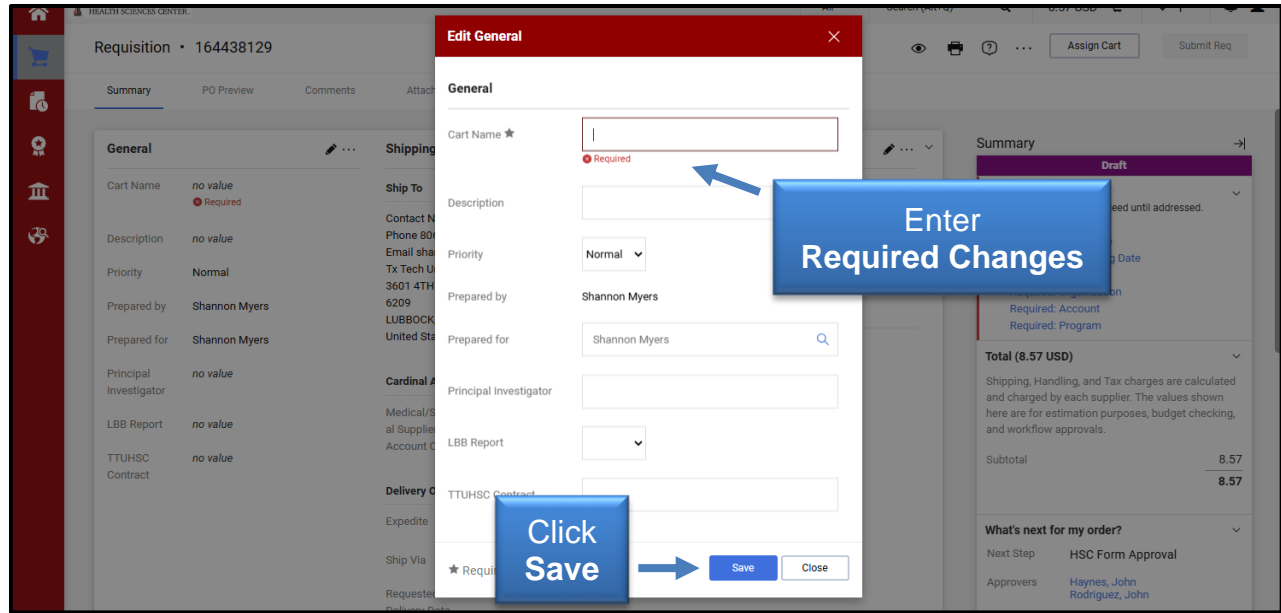
The screenshot displays the TechBuy Requisition interface for requisition 16443. The 'General' section is active, showing fields for Card Name, Description, Priority, Prepared by, Prepared for, Principal Investigator, LBB Report, and TTUHSC Contract. The 'Card Name' field is highlighted with a red 'Required' error message. A blue callout box labeled 'Select Edit' points to the edit icon in the Card Name field. Another blue callout box labeled 'Select Required: Card Name' points to the 'Required' error message. A third blue callout box labeled 'Select Required: Card Name' points to the 'Required: Card Name' item in the 'Correct these issues' message box on the right. The message box also lists other required fields: Accounting Date, Fund, Organization, Account, and Program. The 'Summary' section on the right shows a total of 8.57 USD.

The General section contains the following fields:

- **Card 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. This priority should only be selected for orders that are truly urgent. 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 does not include 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.

After you have edited the General section, click **Save**.

# TechBuy – Reviewing the Cart



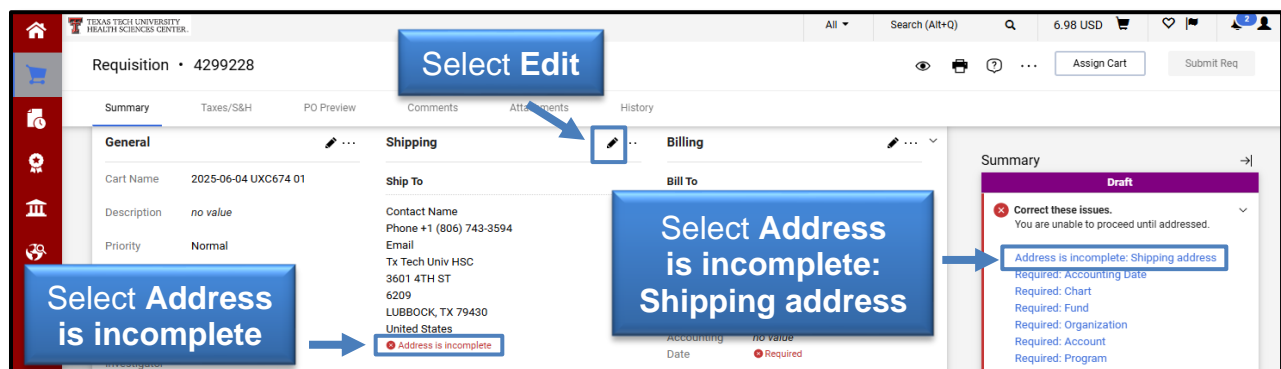
Once you have completed the necessary field(s), the error list will clear for the section.

## Shipping Section

The Shipping section has two blocks that may require changes: Ship To and Delivery Options. If you have access to shop with Henry Schein, you will have a third block titled Cardinal Account Code. Review the Henry Schein Purchases document for information on populating this field. The Buyer Information area is used only by the buyer to add necessary information. Users will not edit this information.

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

To edit the Ship To in the Shipping section, select the **item** from the list in the right message box or in the corresponding section that needs to be addressed before submitting the request. You can also select **Edit** to update the information.



## TechBuy – Reviewing the Cart

This will open an additional window that will allow the user to perform three actions to the shipping address:

- Edit the Current Address - allows you to edit the current address on the document.
- Choose From Your Addresses – allows you to select an address from your personal list of profile addresses (this section is hidden if you do not have addresses in your profile).
- Select a New Address - allows you to search and select an address from TTUHSC's list of available addresses.

If information needs to be corrected for the Current Address, you can edit the **Contact Name, Phone, Email and Rm/STOP**. You can also save this change as a new address in your personal list of addresses by selecting the checkbox titled **Add to my addresses**.

## TechBuy – Reviewing the Cart

You will need to enter a **Nickname** for this new Current Shipping Address. If you want to make this your new default Current Shipping Address, select the checkbox next to **Make default**.

When you have completed editing the information, click **Save** or return the cart without making changes by choosing **Close**.

The screenshot shows the 'Edit Shipping' form with the following fields and annotations:

- Enter Nickname**: A blue box with an arrow pointing to the 'Nickname' field, which has a red border and the text 'Name this address (e.g. Main St)' and 'Address name is required'.
- Select checkbox to Make Default**: A blue box with an arrow pointing to the 'Make default' checkbox.
- Click Save**: A blue box with an arrow pointing to the 'Save' button.

The form includes the following fields:

- Ship To** (with a star icon)
- CURRENT ADDRESS** (selected)
- Contact Name**: Shannon Myers
- Phone**: +1 (806) 743-3594
- Email**: shannon.myers@ttuhsc.edu
- Address Line 1**: Tx Tech Univ HSC
- Address Line 2**: 3601 4TH ST
- Rm/Building**: 6209
- City**: LUBBOCK
- State**: TX
- Zip Code**: 79430
- Country**: United States
- Add to my addresses** (checkbox)
- Make default** (checkbox)
- Search additional** (text input)
- Results Per Page** (dropdown menu)
- Summus Henry Schein Account Code** (text input)
- Required fields** (star icon)
- Save** and **Close** buttons

In the **Choose From Your Addresses** area, your default address is displayed first and is noted with a star icon. Fields that are required for checkout are displayed in bold. Optional fields are displayed in normal font. Change/edit your address by selecting the **address** to reveal more detailed information.

The screenshot shows the 'Edit Shipping' form with the following fields and annotations:

- Select an Address to reveal more details**: A blue box with an arrow pointing to the 'Choose From Your Addresses' section.

The form includes the following fields:

- Ship To** (with a star icon)
- CURRENT ADDRESS** (selected)
- Contact Name**: Shannon Myers
- Phone**: +1 (806) 743-3594
- Email**: shannon.myers@ttuhsc.edu
- Address Line 1**: Tx Tech Univ HSC
- Address Line 2**: 3601 4TH ST
- Rm/Building**: 6209
- City**: LUBBOCK
- State**: TX
- Zip Code**: 79430
- Country**: United States
- Add to my addresses** (checkbox)
- Make default** (checkbox)
- Search additional** (text input)
- Results Per Page** (dropdown menu)
- Summus Henry Schein Account Code** (text input)
- Required fields** (star icon)
- Save** and **Close** buttons

The 'Choose From Your Addresses' section shows the following addresses:

- Lubbock** - Shannon Myers, +1 (806) 743-3594, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, 6209, LUBBOCK, TX 79430, United States
- Southwest Campus** - Shannon Myers, +1 (806) 743-3594, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, 6209, LUBBOCK, TX 79430, United States

## TechBuy – Reviewing the Cart

Update your default address by selecting the **Make Default** checkbox to the right and clicking **Save**. This address will now become the Current Shipping Address.

**Note:** If you cannot locate the correct shipping address from the TechBuy list, contact [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).

The screenshot shows the 'Edit Shipping' window with the 'Ship To' section. The 'Lubbock' address is selected. A blue box highlights the 'Make default' checkbox, with an arrow pointing to it and a callout box saying 'Select Make Default'. Another blue box highlights the 'Save' button, with an arrow pointing to it and a callout box saying 'Click Save'.

In the Select a New Address area, you have the option to search and select from TTUHSC's list of available addresses. You can enter **search criteria** or simply select the **Magnifying Glass** to bring in all the shipping addresses.

By entering no search criteria, you can determine the number of results viewed per page and scroll through pages.

The screenshot shows the 'Edit Shipping' window with the 'Select a New Address' section. A blue box highlights the search bar, with a callout box saying 'Enter Search Criteria or select Magnifying Glass'. Another blue box highlights the 'Results Per Page' dropdown, with a callout box saying 'Select Results Per Page'. A third blue box highlights the pagination controls, with a callout box saying 'Scroll Through Pages'.

After a new address is selected, click **Save**. That address will now appear as the Current Address.



# TechBuy – Reviewing the Cart

**Edit Shipping**

Ship To \*

☐ Current Address - Shannon Myers, +1 (806) 743-3594, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, 6209, LUBBOCK, TX 79430, United States

☐ Lubbock - Shannon Myers, +1 (806) 743-3594, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, 6209, LUBBOCK, TX 79430, United States

☐ Southwest Campus - Shannon Myers, +1 (806) 743-3594, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, 6209, LUBBOCK, TX 79430, United States

☒ HAB002

Contact Name \* Shannon Myers ☐ Add to my addresses

Phone +1 806-743-3594

Email shannon.myers@ttuhsc.edu

Address Line 1 Tx Tech Univ HSC

Address Line 2 13055 FM 3522

Rm/Building \* Rm/Building

City ABILENE

State TX

Zip Code 79601

Country United States

☐ HAB003 - Shannon Myers, +1 806-743-3594, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 1718 PINE ST, Rm/Building, ABILENE, TX 79601, United States

\* Required fields

Save Close

To edit the Delivery Options information, select **Edit** in the Shipping section area.

Requisition • 4299228

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Cart Name 2025-06-04 UXC674 01	Ship To	Bill To
Description no value	Contact Name Shannon Myers	TTUHSC Payables
Priority Normal	Phone +1 (806) 743-3594	Box 5970
Prepared by Shannon Myers	Email shannon.myers@ttuhsc.edu	Lubbock, TX 79408
Prepared for Shannon Myers	Tx Tech Univ HSC	United States
	3601 4TH ST	
	6209	
	LUBBOCK, TX 79430	
		Billing Options

The Delivery Options area contains the following fields:

- Expedite – Use this checkbox to flag an item as a rush item. If expedite is selected, the order is flagged in the system. Expedite should only be marked for orders that are truly urgent. If all orders are marked as urgent, the flag will no longer have its intended significance.
- Ship Via – Provides a list of shipping methods.
- Requested Delivery Date – 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 the request. Click **Save** when completed.



# TechBuy – Reviewing the Cart


The screenshot shows the 'Edit Shipping' form in the TechBuy system. The form is divided into several sections: 'State' (TX), 'Zip Code' (79430), 'Country' (United States), 'Search additional' (with a search icon and 'Results Per Page' set to 10), 'Summus Henry Schein Account Code' (with a search icon), and 'Delivery Options'. The 'Delivery Options' section includes 'Expedite' (checkbox), 'Requested Delivery Date' (calendar icon), 'Shipment Via' (dropdown), and 'Destination' (dropdown). A blue box highlights the 'Delivery Options' section, and a blue arrow points to it with the text 'Complete each Field, as needed'. Another blue arrow points to the 'Save' button with the text 'Click Save'. The background shows a sidebar with navigation icons and a list of requisitions.

## Billing Section

The Billing section has two vital sections titled Bill To and Billing Options. Each of these fields is required and needs 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, 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 a date within an open accounting period unless instructed otherwise by Purchasing.

To edit the Bill To or the Billing Options in the Billing section, select an **item** from the list in the right message box or in the corresponding section that needs to be addressed before submitting the request. You can also select **Edit**  to update the information.

# TechBuy – Reviewing the Cart

This screenshot shows the 'Requisition - 4299228' page in the TechBuy system. The 'Summary' tab is active, displaying details for the requisition. Annotations include:

- A blue box labeled 'Select Edit' with an arrow pointing to the edit icon (pencil) next to the 'Shipping' section.
- A blue box labeled 'Select Required Field' with an arrow pointing to the 'Accounting' field, which is marked as 'no value' and 'Required'.
- A blue box labeled 'Select Required: Accounting Date' with an arrow pointing to the 'Required: Accounting Date' message in the 'Summary' sidebar.

Enter the **current date** unless instructed otherwise by Purchasing, and click **Save**.

This screenshot shows the 'Edit Billing' window for requisition 4299228. The 'CURRENT ADDRESS' section is expanded, showing the address for 'TTUHSC Payables'. Annotations include:

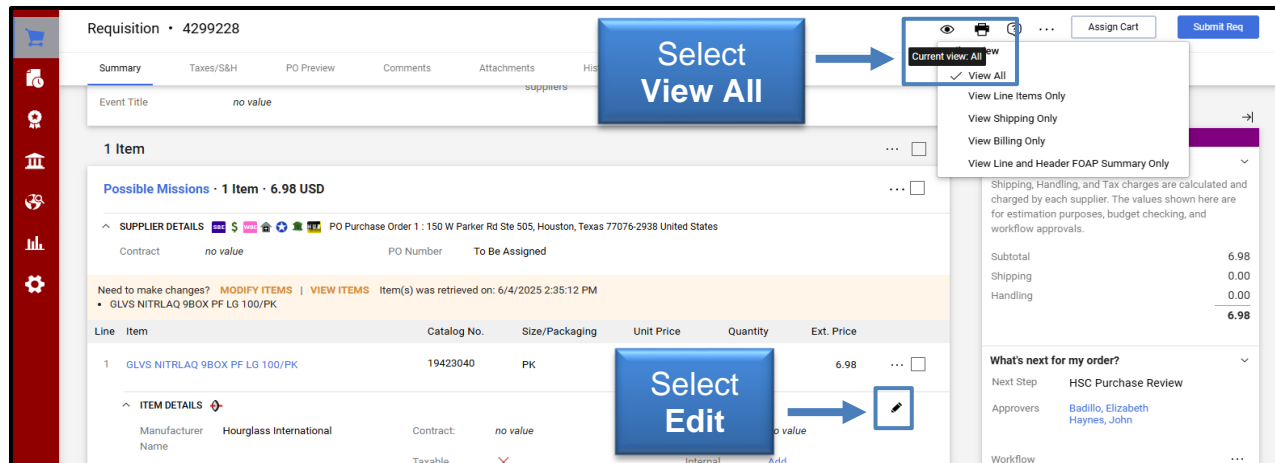
- A blue box labeled 'Enter Current Date' with an arrow pointing to the 'Accounting Date' field, which is marked as 'Required'.
- A blue box labeled 'Click Save' with an arrow pointing to the 'Save' button at the bottom right of the window.

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

## Recurring Payment and Advanced Pay

You have the opportunity to mark an order as a Recurring Payment or Advanced Pay. In the View All of the Summary of your cart, scroll to the Supplier / Line-Item Details and select **Edit** to the right of the line item(s).

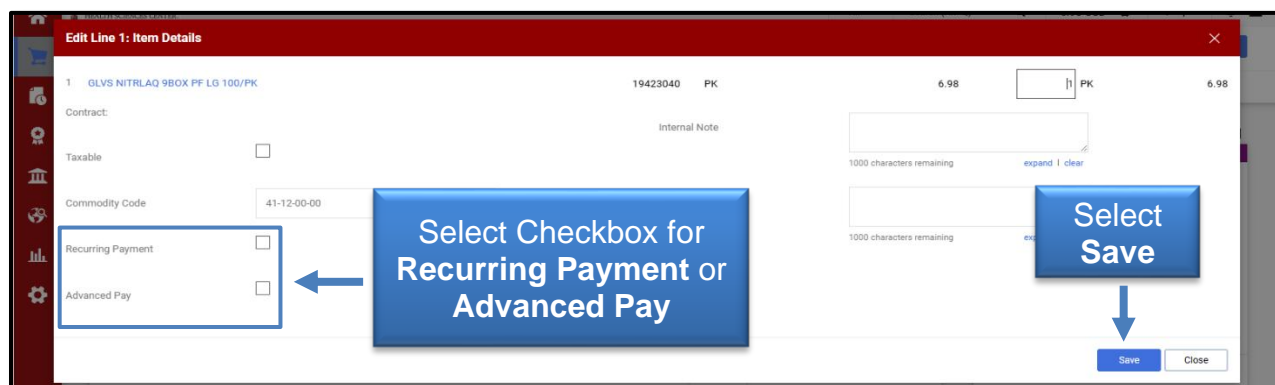
# TechBuy – Reviewing the Cart



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.

Enter any **justification** or **additional information** in the Internal Notes section. Once you have marked the appropriate options, select **Save**.

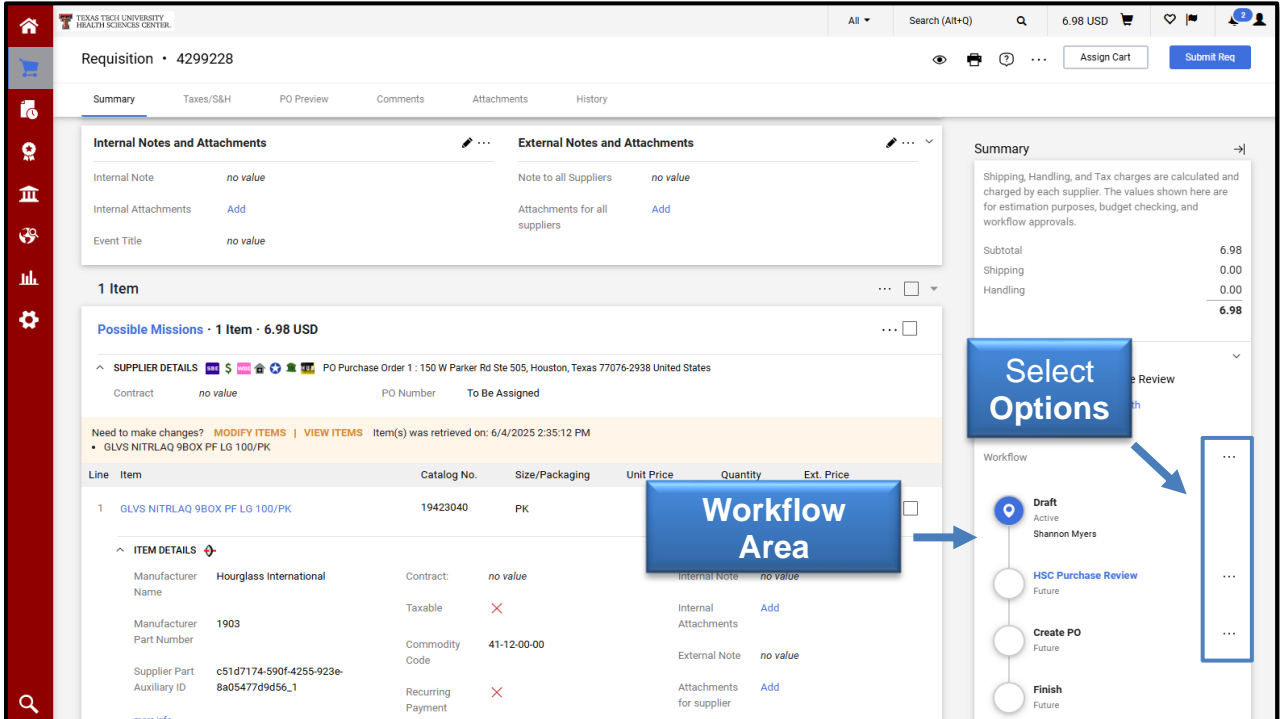


## Workflow and Approval Steps

The Workflow and Approval Steps area will display on the right side of the Summary screen. The number of steps needed to finish the order will depend upon many factors including the total value of the requisition, items requested, and departmental policies.

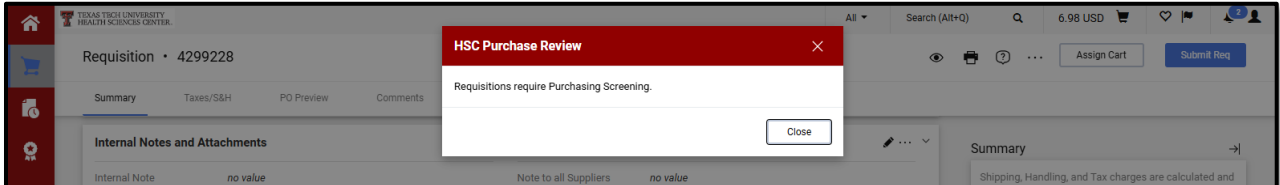
# TechBuy – Reviewing the Cart

Your current workflow step will be highlighted with a blue location pin. Details on future action steps can be viewed by selecting **Options**  to the right of a specific step.



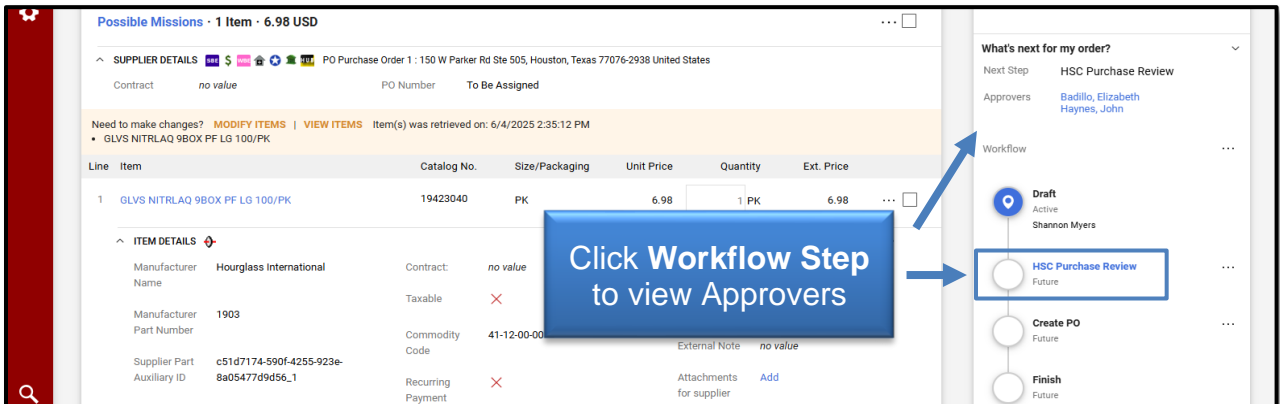
The screenshot displays the TechBuy interface for a requisition (4299228). The main content area shows item details for 'GLVS NITRLAQ 9BOX PF LG 100/PK'. A blue callout box labeled 'Workflow Area' points to the workflow section on the right. The workflow section shows a sequence of steps: Draft (Active, Shannon Myers), HSC Purchase Review (Future), Create PO (Future), and Finish (Future). A blue callout box labeled 'Select Options' points to the three dots icon next to the 'HSC Purchase Review' step.

A new window will open and display details regarding the future workflow step.



The screenshot shows the same requisition page, but a modal window titled 'HSC Purchase Review' is open. The modal contains the text 'Requisitions require Purchasing Screening.' and a 'Close' button.

Click a **workflow step** highlighted in blue to view approvers for the specified step.



The screenshot shows the same requisition page, but the 'HSC Purchase Review' step in the workflow is highlighted with a blue box. A blue callout box labeled 'Click Workflow Step to view Approvers' points to this step. The workflow section also shows the 'Next Step' as 'HSC Purchase Review' and the 'Approvers' as 'Badillo, Elizabeth' and 'Haynes, John'.

# TechBuy – Reviewing the Cart

A list of authorized approvers along with their email and phone contact information will display.

The screenshot displays the TechBuy interface for reviewing a requisition (4299228). The main area shows internal and external notes, a list of items, and a summary sidebar. A blue callout box labeled "List of Authorized Approvers" points to the "Approvers" section in the sidebar, which lists Elizabeth Badillo and John Haynes with their contact information.

## PO Preview

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 allows you to see what information will be sent to the vendor.

To preview the information, select the **PO Preview** section. A preview of each purchase order by vendor will display.

The screenshot displays the TechBuy interface for previewing a purchase order (140670502). The main area shows a preview of a purchase order from Cambridge Isotope Laboratories. A blue callout box labeled "Select PO Preview" points to the "PO Preview" tab, and another blue callout box labeled "Preview of Purchase Order" points to the PO details.

Item	Catalog No.	Unit Price	Quantity	Ext. Price
1 PCB EXHIBIT CALIBRATION SOLUTION CS0.2 (UNLABELED/13C12, 99%)	EC-5531-CS0.2	405.00	1 EA	405.00
2 PCB EXHIBIT CALIBRATION SOLUTION CS0.2 (UNLABELED/13C12, 99%)	EC-5531-CS0.2	405.00	1 EA	405.00

For additional questions about TechBuy, email [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).