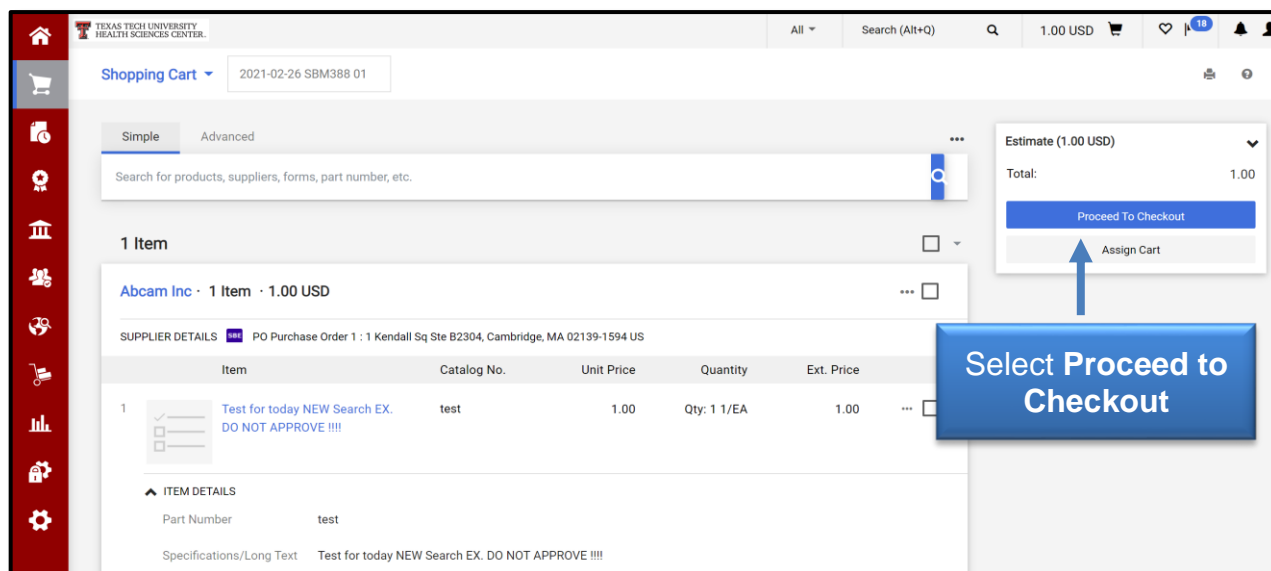




Once the items you wish to add to your requisition are in the active cart, you are ready to review. During the cart review, you can edit the shipping address, edit the fulfillment address, name the cart, verify the accounting date, enter accounting information, and include any external or internal notes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

Select Issue

Issues:

- Address is incomplete: Shipping address
- Required: Accounting Date
- Required: Fund
- Required: Organization
- Required: Account

Form Fields:

- General:** Cart Name (2021-02-26 SBM388 01), Description (no value), Priority (Normal), Prepared by (Thi Bui), Prepared for (Thi Bui), Principal Investigator (no value), Purchase Order Classification (no value).
- Shipping:** Ship To (Contact Name, Phone, Email, Tx Tech Univ HSC, 3601 4TH ST, Rm/STOP, LUBBOCK, TX 79430, United States), Cardinal Account Code (Address is incomplete).
- Billing:** Bill To (TTUHSC Pa, Box 5970, Lubbock, TX, United States), Billing Options (Accounting Date (no value), Required).

Summary: Total (1.00 USD), Subtotal (1.00), Total (1.00).

Buttons: Submit Req, Assign Cart.

If you want to view specific information, select the **eye icon** at the top right of the screen to reveal the drop-down menu to **View Line Items Only** or **View Accounting Codes Only**.

Line Items Only

Select Eye Icon


Click View Line Items Only or View Accounting Codes Only

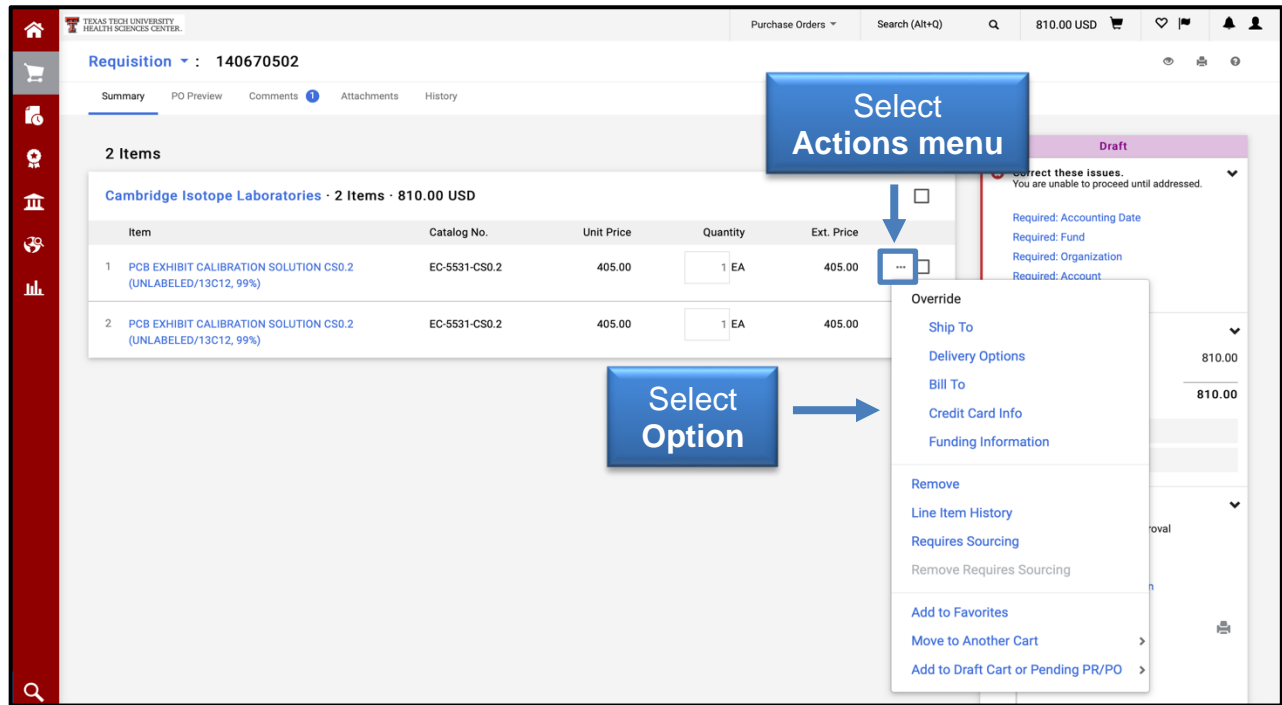
Summary: 2 Items, Cambridge Isotope Laboratories · 2 Items · 810.00 USD

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


Buttons: Assign Cart.

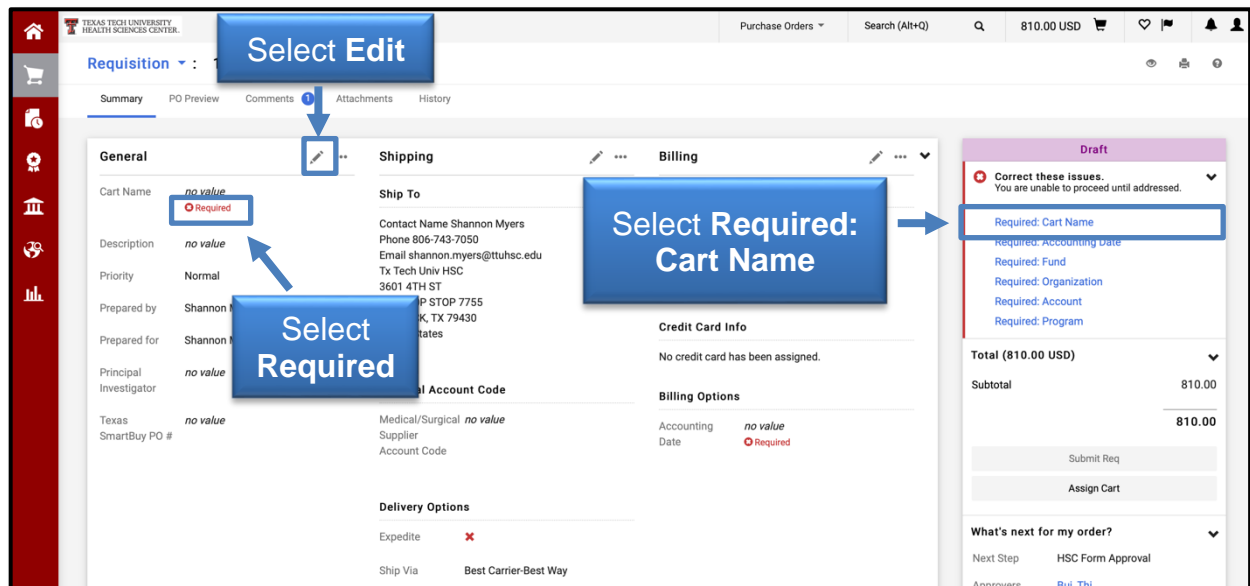
TechBuy – Reviewing the Cart

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



General Section

To edit the General section, select an **item** from the **issues** list in the message box or in the corresponding section. You can also select **Edit**  to update the section information.



TechBuy – Reviewing the Cart

The General section 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. 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, select **Save Changes**.

The screenshot displays the 'Edit General' form for requisition 140670502. The form includes the following fields:

- Cart Name: 2021-02-10 UXC674 C (with a red 'Required' indicator)
- Description: (empty)
- Priority: Normal (dropdown menu)
- Prepared by: Shannon Myers
- Prepared for: Shannon Myers (with a search icon)
- Principal Investigator: (empty)
- Texas SmartBuy PO #: No Value

A blue callout box with the text 'Enter Required Changes' points to the Cart Name field. Another blue callout box with the text 'Select Save Changes' points to the 'Save Changes' button at the bottom of the form. The background shows the requisition details and a summary of the order.

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

TechBuy – Reviewing the Cart

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 upon 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.

The screenshot displays the TechBuy Requisition form for requisition 140670502. The 'Shipping' section is highlighted, showing the 'Ship To' field with contact information for Shannon Myers at TTUHSC. A blue box labeled 'Select Edit' points to the edit icon in the Shipping section header. Another blue box labeled 'Select Address is incomplete' points to the 'Address is incomplete' error message in the Shipping section. A third blue box labeled 'Select Address is incomplete: Shipping address' points to the 'Address is incomplete: Shipping address' error message in the Draft section. The Draft section also lists other required fields: Accounting Date, Fund, Organization, Account, and Program.

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.

TechBuy – Reviewing the Cart

The screenshot shows the 'Edit Shipping' window with the 'CURRENT ADDRESS' section highlighted. The address details are as follows:

Field	Value
Contact Name *	Shannon Myers
Phone	806-743-7050
Email	shannon.myers@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

Callouts in the image:

- Edit Current Shipping Address**: Points to the 'CURRENT ADDRESS' section.
- Choose Your Address**: Points to the 'CURRENT ADDRESS' section.
- Select New Address**: Points to the 'Search additional' field.

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**.

The screenshot shows the 'Edit Shipping' window with the 'CURRENT ADDRESS' section highlighted. The address details are as follows:

Field	Value
Contact Name *	Shannon Myers
Phone	806-743-7050
Email	shannon.myers@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

Callouts in the image:

- Select Add to my addresses**: Points to the 'Add to my addresses' checkbox.
- Edit Rm/STOP**: Points to the 'Rm/STOP' field.

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**.

TechBuy – Reviewing the Cart

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

Edit Shipping

Ship To

CURRENT ADDRESS

Contact Name * Shannon Myers

Phone 806-743-7050

Email shannon.myers@ttuhsc.edu

Address Line 1 Tx Tech Univ HSC

Address Line 2 3601 4TH ST

Rm/STOP * 6209

City LUBBOCK

State TX

Zip Code 79430

Country United States

☒ Add to my addresses

Nickname * Name this address (e)

Make default ☐

HLU002 - Shannon Myers, 806-743-7050, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, STOP 7755, LUBBOCK, TX 79430, United States

Search additional

Results Per Page 10

Cardinal Account Code

Save Changes **Close**

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.

You can change/edit your address by clicking the **address** to reveal more detailed information.

Edit Shipping

Ship To

CURRENT ADDRESS

Contact Name * Shannon Myers

Phone 806-743-7050

Email shannon.myers@ttuhsc.edu

Address Line 1 Tx Tech Univ HSC

Address Line 2 3601 4TH ST

Rm/STOP * 6209

City LUBBOCK

State TX

Zip Code 79430

Country United States

☐ Add to my addresses

Southwest Campus - Shannon Myers, 806-743-7050, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, 6209, LUBBOCK, TX 79430, United States

HLU002 - Shannon Myers, 806-743-7050, shannon.myers@ttuhsc.edu, Tx Tech Univ HSC, 3601 4TH ST, STOP 7755, LUBBOCK, TX 79430, United States

Search additional

Results Per Page 10

Save Changes **Close**

TechBuy – Reviewing the Cart

You can update your default address by selecting the **Make Default** checkbox to the right and clicking **Save Changes**. 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.

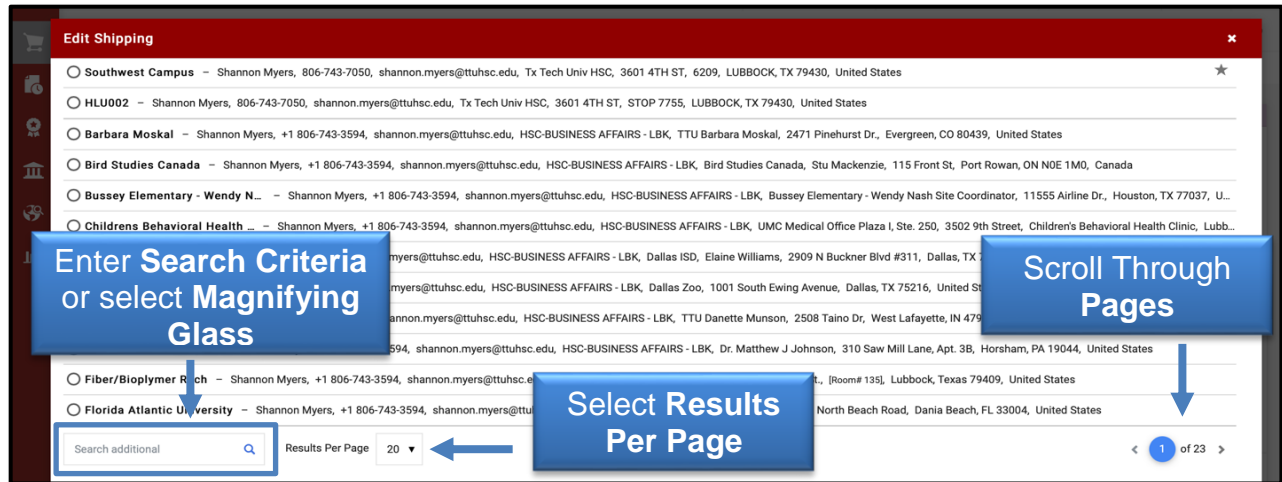
The screenshot displays the 'Edit Shipping' window in the TechBuy system. The window has a red header bar with the title 'Edit Shipping' and a close button. Below the header, there's a 'Ship To' section with two radio buttons: 'Current Address' and 'Southwest Campus'. Both are currently selected. Below this, a list of addresses is shown, with 'HLU002' selected. The address details for 'HLU002' are displayed in a form with fields for Contact Name, Nickname, Phone, Email, Address Line 1, Address Line 2, Rm/STOP, City, State, Zip Code, and Country. A 'Make default' checkbox is located to the right of the address details. A blue arrow points from a 'Select Make Default' button to this checkbox. At the bottom of the window, there's a 'Search additional' button, a 'Results Per Page' dropdown set to 10, and a 'Select Save Changes' button. A blue arrow points from this button to the 'Save Changes' button in the bottom right corner.

Field	Value
Contact Name *	Shannon Myers
Phone	806-743-7050
Email	shannon.myers@ttuhsc.edu
Address Line 1	Tx Tech Univ HSC
Address Line 2	3601 4TH ST
Rm/STOP *	STOP 7755
City	LUBBOCK
State	TX
Zip Code	79430
Country	United States

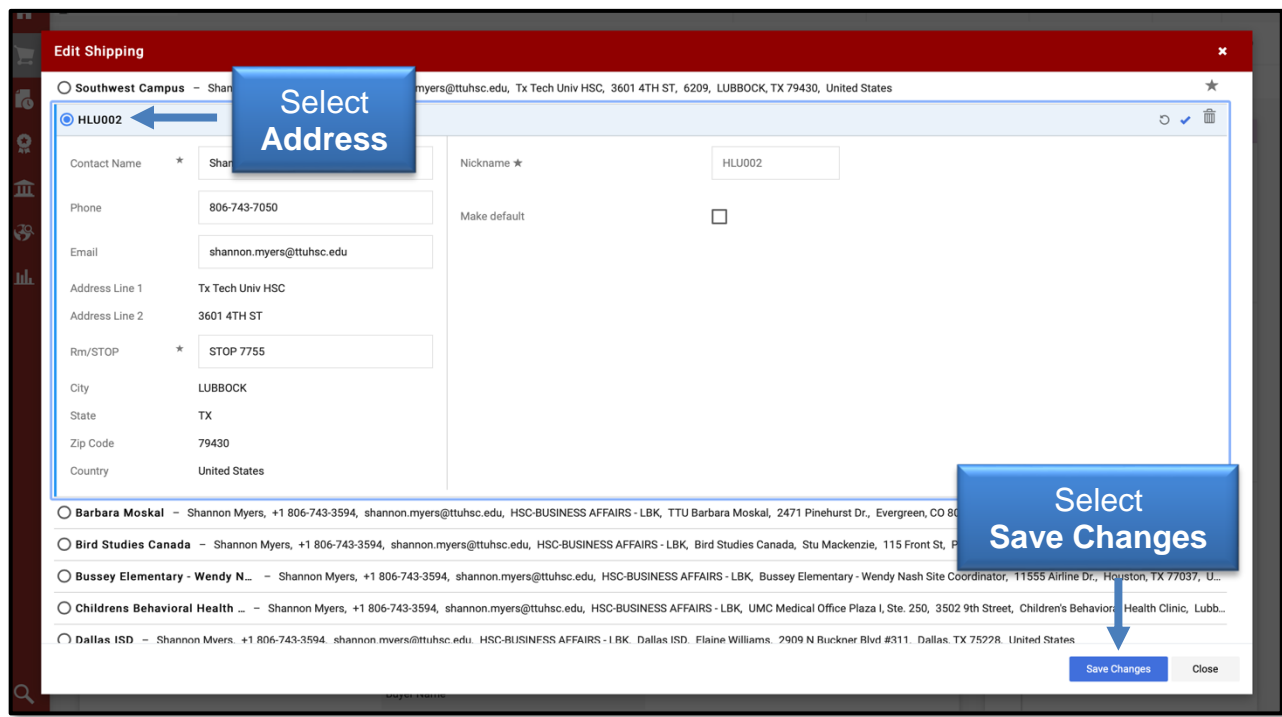
In the Select a New Address area, you have the option to search and select from TTUHSC's list of available addresses. You can enter **search criteria** or simply select the **Magnifying Glass** to bring in all the shipping addresses.


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

TechBuy – Reviewing the Cart



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



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

TechBuy – Reviewing the Cart

Requisition : 140670502

Summary PO Preview Comments 1 Attachments History

General

Cart Name 2021-02-10 UXC674 01

Description *no value*

Priority Normal

Prepared by Shannon Myers

Prepared for Shannon Myers

Principal Investigator *no value*

Texas *no value*

SmartBuy PO #

Shipping

Ship To

Contact Name Shannon Myers
Phone 806-743-7050
Email shannon.myers@ttuhsc.edu
Tx Tech Univ HSC
3601 4TH ST
Rm/STOP 6209
LUBBOCK, TX 79430
United States

Cardinal Account Code

Medical/Surgical *no value*
Supplier
Account Code

Delivery Options

Expedite ☒

Ship Via Best Carrier-Best Way

Billing

Bill To

TTUHSC Payables
Box 5970
Lubbock, TX 79408
United States

Credit Card Info

No credit card has been assigned.

Billing Options

Accounting *no value*
Date ☒ Required

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. Select **Save Changes** when completed.


TechBuy – Reviewing the Cart

The screenshot shows the 'Edit Shipping' form in the TechBuy system. The form includes sections for 'Cardinal Account Code', 'Medical/Surgical Supplier Account Code', 'Delivery Options', and 'Buyer Information'. The 'Delivery Options' section is highlighted with a blue box and contains fields for 'Expedite' (checkbox), 'Ship Via' (dropdown menu showing 'Best Carrier-Best W...'), and 'Requested Delivery Date' (calendar icon and text input). A blue callout box with the text 'Complete each Field, as needed' has an arrow pointing to the 'Delivery Options' section. Another blue callout box with the text 'Select Save Changes' has an arrow pointing to the 'Save Changes' button at the bottom right of the form. The 'Buyer Information' section includes a 'Buyer Name' dropdown menu showing 'None'.

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

Requisition 140670502

General

Cart Name: 2021-02-10 UXC674 01

Description: no value

Priority: Normal

Prepared by: Shannon Myers

Prepared for: Shannon Myers

Principal Investigator: no value

Texas SmartBuy PO #: no value

Shipping

Ship To:

Contact Name: Shannon Myers

Phone: 806-743-7050

Email: shannon.myers@ttuhsc.edu

Tx Tech Univ HSC

3601 4TH ST

Rm/STOP 6209

LUBBOCK, TX 79430

United States

Cardinal Account Code:

Billing

Bill To:

TTUHSC Payables

Box 5970

Lubbock, TX 79408

United States

Credit Card Info:

No credit card has been assigned.

Billing Options

Accounting Date: no value (Required)

Draft

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

Required: Accounting Date

Required: Fund

Required: Organization

Required: Account

Submit Req

Assign Cart

What's next for my order?

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

Edit Billing

CURRENT ADDRESS

Contact Line 1: * TTUHSC Payables

Address Line 1: Box 5970

City: Lubbock

State: TX

Zip Code: 79408

Country: United States

☐ Add to my addresses

Credit Card Info

Billing Options

Accounting Date: mm/dd/yyyy (Required)


Click Save Changes

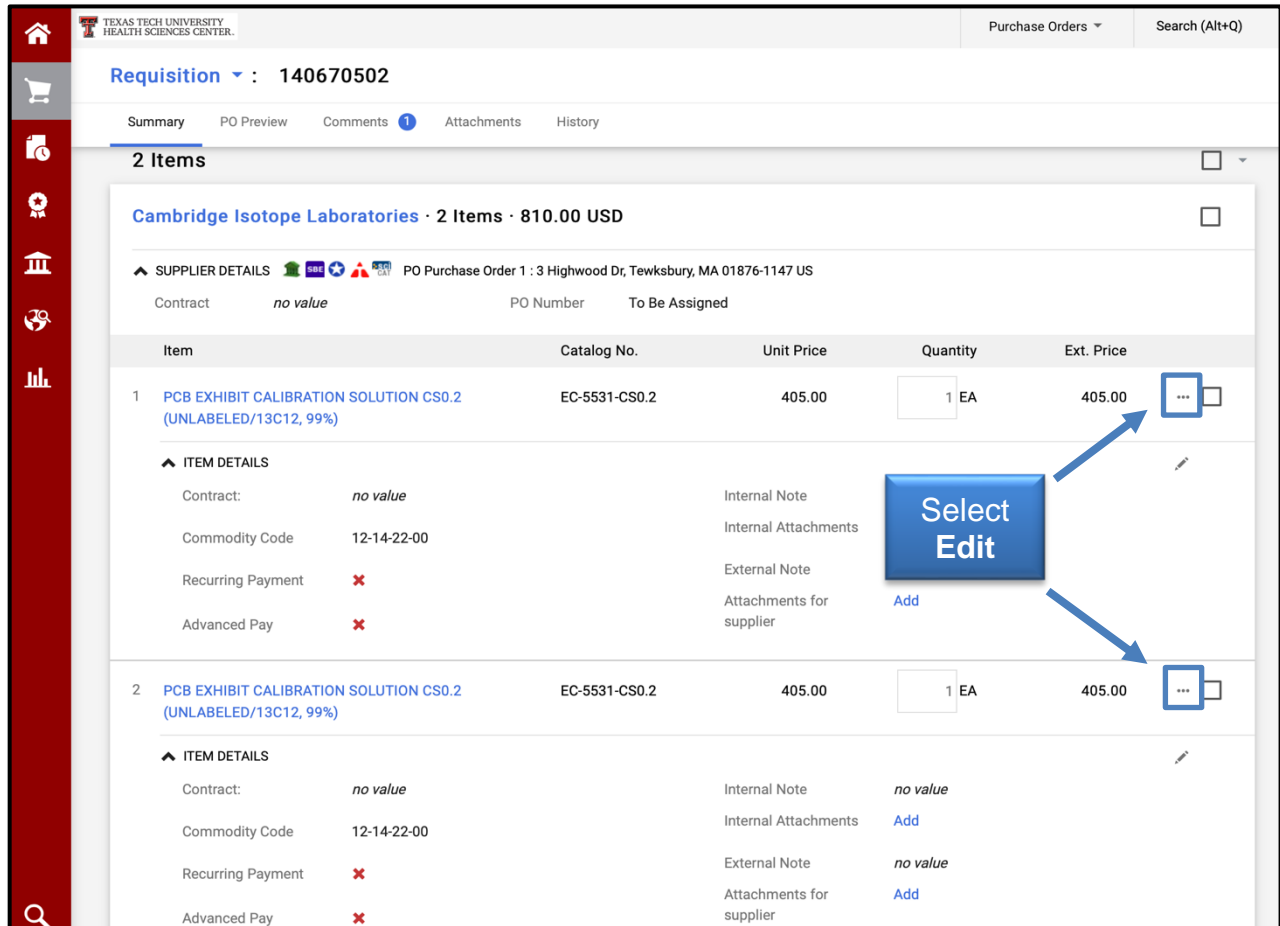
Save Changes Close

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

TechBuy – Reviewing the Cart

Recurring Payment and Advanced Pay

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



The screenshot shows the TechBuy interface for reviewing a cart. At the top, it displays 'Requisition : 140670502' and 'Purchase Orders' with a search bar. Below this, there are tabs for 'Summary', 'PO Preview', 'Comments', 'Attachments', and 'History'. The main section is titled '2 Items' and shows details for 'Cambridge Isotope Laboratories' with a total of '2 Items · 810.00 USD'. The supplier details include 'PO Purchase Order 1 : 3 Highwood Dr, Tewksbury, MA 01876-1147 US' and 'Contract no value'. A table lists two items, both 'PCB EXHIBIT CALIBRATION SOLUTION CS0.2 (UNLABELED/13C12, 99%)' with a unit price of 405.00 and a quantity of 1 EA. To the right of each item is a blue box labeled 'Select Edit' with arrows pointing to the edit icons (three dots) for each item. Below the table, there are sections for 'ITEM DETAILS' for each item, including 'Contract', 'Commodity Code', 'Recurring Payment', 'Advanced Pay', 'Internal Note', 'Internal Attachments', 'External Note', and 'Attachments for supplier'.

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

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**.

TechBuy – Reviewing the Cart

Edit Line 1: Item Details

1 PCB EXHIBIT CALIBRATION SOLUTION CS0.2 (UNLABELED/13C12, 99%) EC-5531-CS0.2 405.00 1 EA 405.00

Contract: Internal Note 1000 characters remaining expand | clear

Commodity Code 12-14-22-00 External Note 1000 characters remaining expand | clear

Recurring Payment ☐ Advanced Pay ☐

★ Required fields

Commodity Code 12-14-22-00 Internal Attachments Add Submit Req

Select Checkbox for Recurring Payment or Advanced Pay

Select Save

Save Cancel

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.

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

Requisition 140670502

Summary PO Preview Comments Attachments History

General

Cart Name 2021-02-10 UXC674 01

Description no value

Priority Normal

Prepared by Shannon Myers

Prepared for Shannon Myers

Principal Investigator no value

Texas SmartBuy PO # no value

Shipping

Ship To

Contact Name Shannon Myers

Phone 806-743-7050

Email shannon.myers@ttuhsc.edu

Tx Tech Univ HSC

3601 4TH ST

Rm/STOP 6209

LUBBOCK, TX 79430

United States

Cardinal Account Code

Medical/Surgical no value

Supplier Account Code

Delivery Options

Expedite ☒

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Buyer Information

Billing

Bill To

TTUHSC Payables

Box 5970

Lubbock, TX 79408

United States

Billing Options

Accounting Date 3/9/2021

Workflow Area

Assign Cart

What's next for my order?

Next Step HSC Form Approval

Approvers Bul, T Hayn Redr

Workflow

Draft Active Shannon Myers

Budget Authorization Future

HSC Form Approval Future

HSC Purchase Review Future

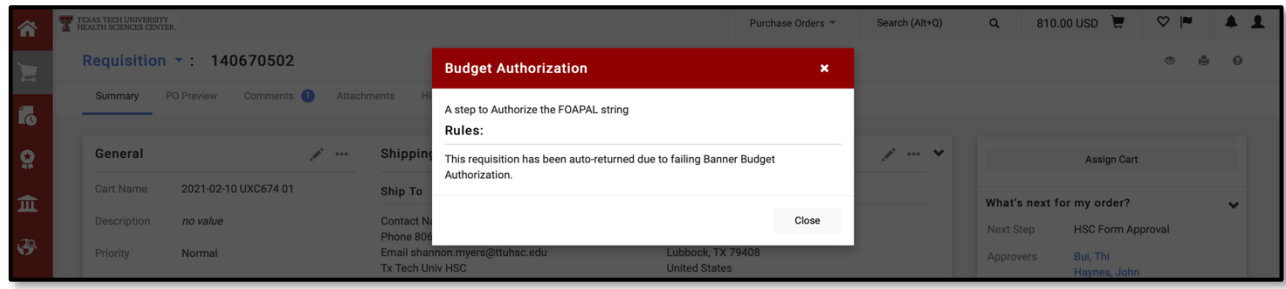
Create PO Future

Finish Future

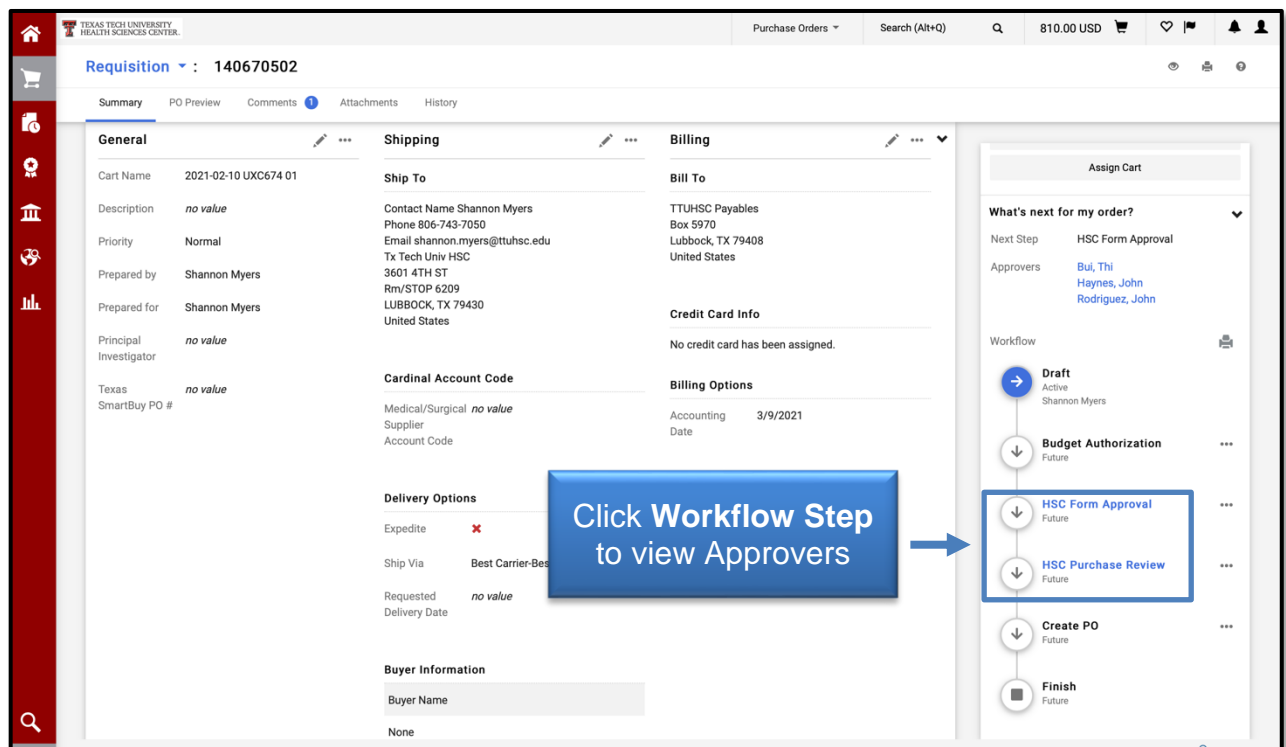
Select Options

TechBuy – Reviewing the Cart

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



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



TechBuy – Reviewing the Cart

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

General

Cart Name 2021-02-10 UXC674 01

Description no value

Priority Normal

Prepared by Shannon Myers

Prepared for Shannon Myers

Principal Investigator no value

Texas SmartBuy PO # no value

Shipping

Ship To

Contact Name Shannon Myers

Phone 806-743-7050

Email shannon.myers@ttuhsc.edu

Tx Tech Univ HSC

3601 4TH ST

Rm/STOP 6209

LUBBOCK, TX 79430

United States

Cardinal Account Code

Medical/Surgical no value

Supplier

Account Code

Delivery Options

Expedite ☒

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Buyer Information

Buyer Name

None

Billing

Bill To

TTUHSC Payables

Box 5970

Lubbock, TX 79408

HSC Form Approval

Future

Account Code Review

John Haynes

john.g.haynes@ttuhsc.edu

+1 806-743-7387

John Rodriguez

john.rodriguez@ttuhsc.edu

+1 806-743-7391

Thi Bui

thi.bui@ttuhsc.edu

+1 806-743-1425

HSC Purchase Review

Future

Banner HSC Purchasing Doc limit Greater \$500.00

John Haynes

john.g.haynes@ttuhsc.edu

+1 806-743-7387

John Rodriguez

john.rodriguez@ttuhsc.edu

+1 806-743-7391

Shawn Oibeter

shawn.oibeter@ttuhsc.edu

+1 806-743-7386

Thi Bui

thi.bui@ttuhsc.edu

+1 806-743-1425

Create PO

Future

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.

Requisition 140670502

Purchase Orders

Search (Alt+Q)

Summary PO Preview

Select PO Preview

Preview of Purchase Order

Preview PO 1

Cambridge Isotope Laboratories · 2 Items · 810.00 USD

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

PO Number To Be Assigned