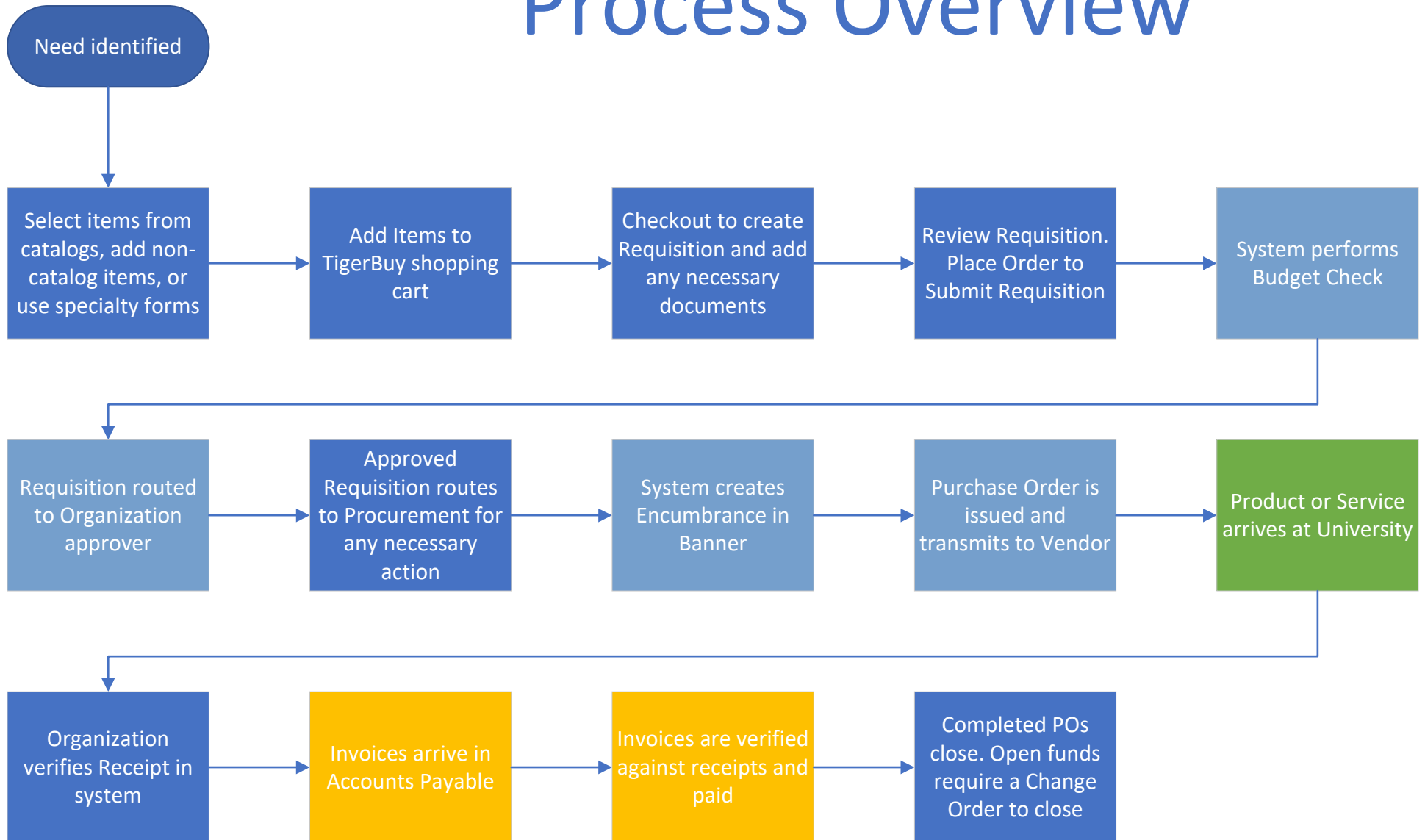
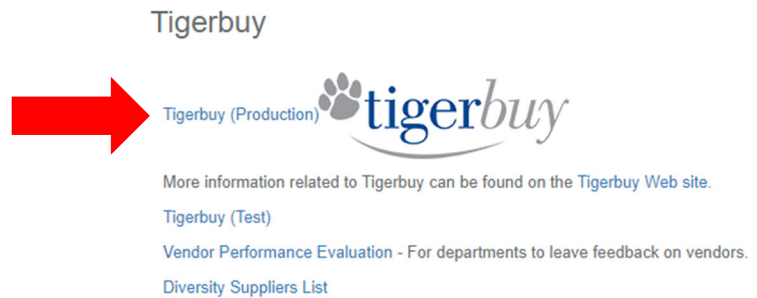
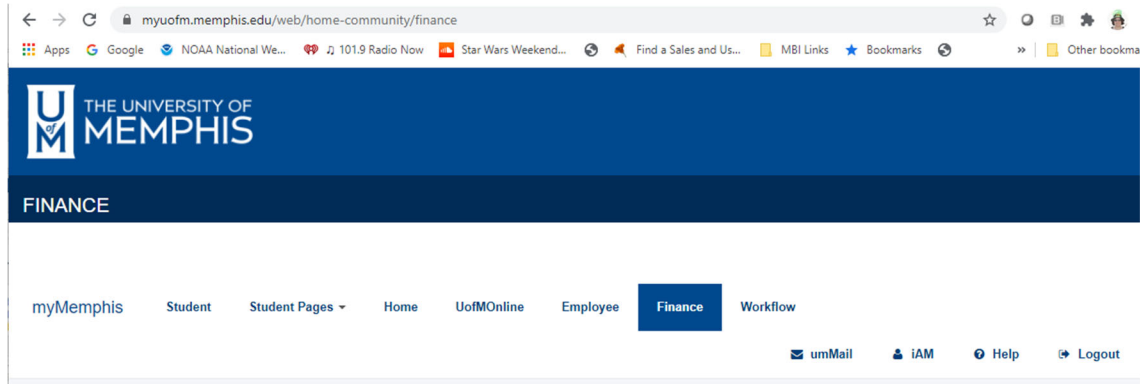


# Process Overview

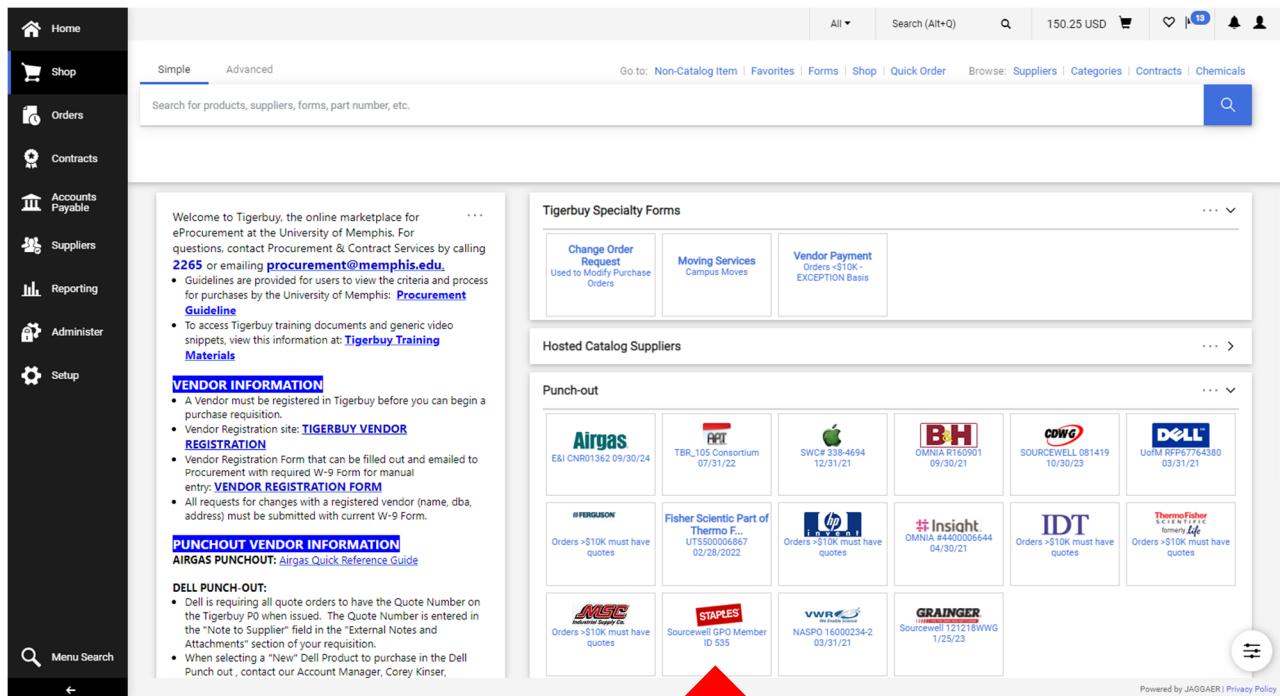


## How to – Make a basic Staples order

From MyMemphis, go to the Finance tab and choose Tigerbuy Production



This will bring you to the shopping home page. Click on the Staples Punch Out Catalog button:



A screen comes up asking for the delivery zip code. Enter the zip code and click Continue.

### Delivery ZIP code

Please enter the ZIP Code of your delivery location so we can provide accurate product availability.

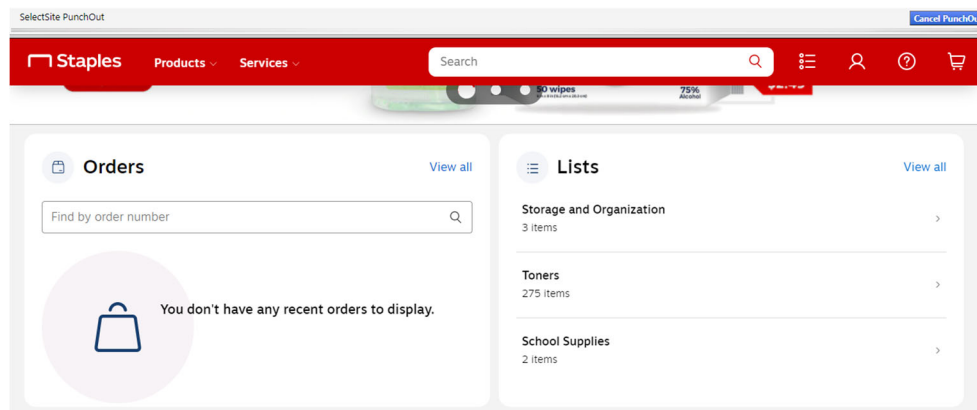
For international orders, please enter '00000'.

ZIP code  
38152

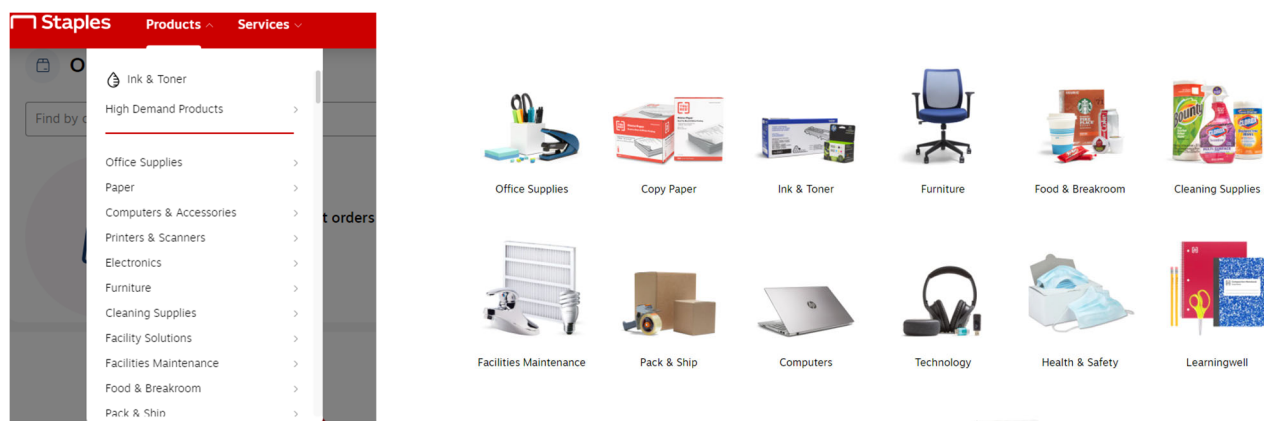
Continue

Please note the estimations provided are based off the ZIP code entered, the SKU searched, and the day and time. Our inventories are constantly changing so if any of these variables change then the estimates may no longer be accurate.

This brings up the Staples Catalog home page. You will see places to see past orders and create your shopping lists of frequently bought items. There is a search bar at the top.



Use the Products menu at the top or scroll down to see product categories.



The catalog looks like any other shopping website. Choose items and add them to cart. Click on an item to go into the item information.

Products
Services

Pick up
Brand
Category

26% off

TRU RED™ 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 10 Reams/Carton (TR56958)

**\$42.22** ~~\$57.49~~  
5000/CT  
Free delivery

Pick up in 1 hour

1 Add

40% off

8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)

**\$34.47** ~~\$57.99~~  
5000/CT

1 Add

32% off

Staples 30% Recycled Copy Paper 8.5" x 11", 20 lbs., White, 5000 Sheets/Carton (112350/461757)

**\$49.97** ~~\$73.69~~  
5000/CT  
Free delivery

Pick up in 1 hour

1 Add

45% off

Hammermill Copy Plus Paper, 8.5" x 11", 20 lbs., White, 500 Sheets/Ream, 10 Reams/Carton (105007)

**\$41.70** ~~\$75.99~~  
5000/CT  
Free delivery

Pick up in 1 hour

1 Add

\*Important note: The catalog has been set up to show allowable product categories, however some items fall into an allowable category, but are not appropriate for your area or purpose. It is your responsibility to ensure your purchases comply with all University policies and guidelines. \* Blocked items are generally items that should be purchased from a different vendor.

Once you have chosen your items, go to your cart to get ready for checkout. The cart shows your items, quantities, and prices. You can adjust quantities or remove items from the cart.

2 items in cart

Delivery

Sharpie Permanent Marker, Fine Point, Black, 12/Pack (30001)

Item # 125328 | MFR # 30001 | CIN # 125328

ECO

☒ Delivery ☐ Pick up in store

1 @ \$5.59 12/DZ

**\$5.59**

[Remove](#)

Staples Ream-Less Copy Paper, 8.5" x 11", 20 lbs., White, 2500 Sheets/Carton (20587)

Item # 905797 | MFR # 20587 | CIN # 905797

ECO

☒ Delivery

1 @ \$28.50 2500/CT

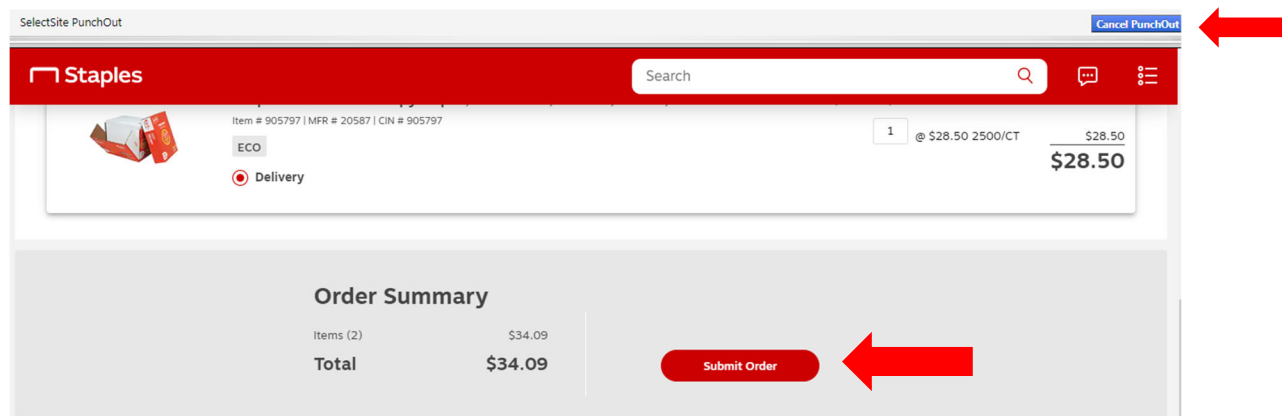
**\$28.50**

[Remove](#)



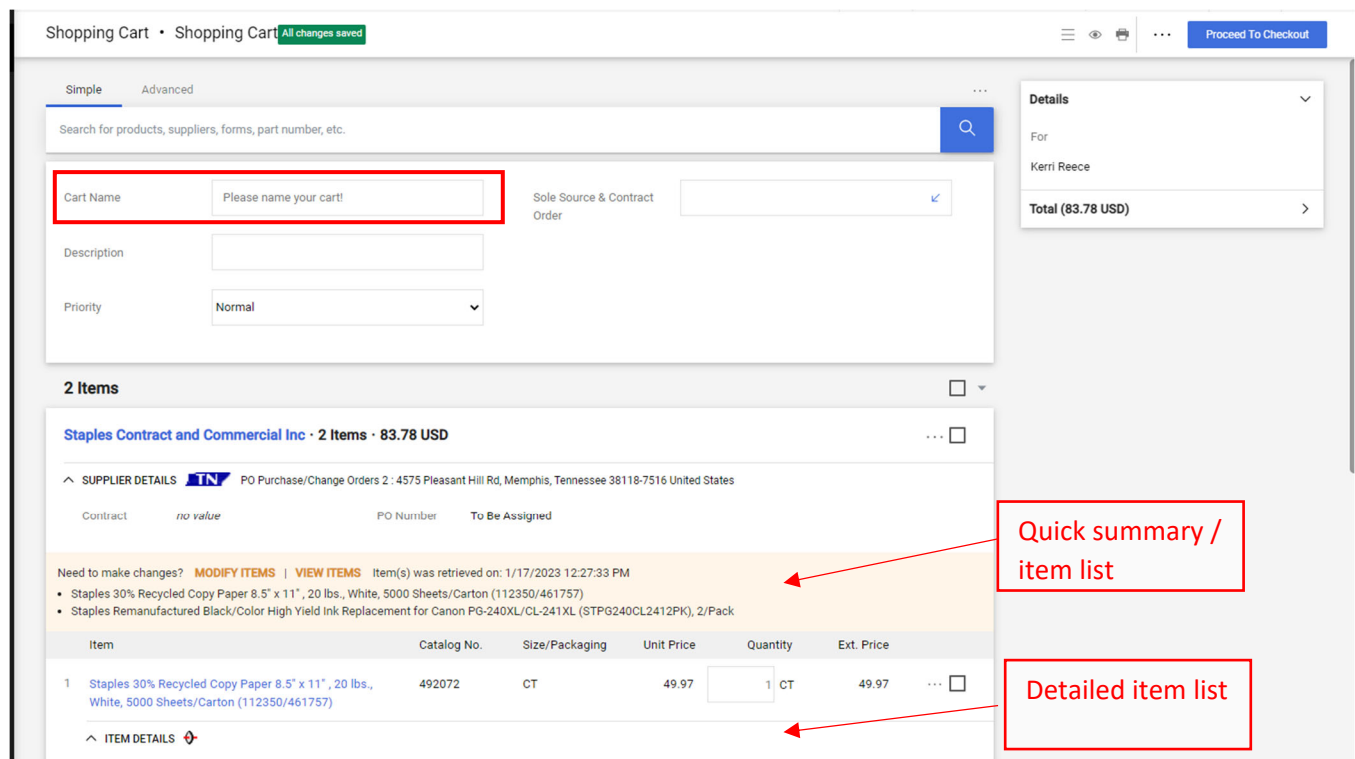
When all is as you wish, click **Submit order**. This is going to take your cart / order and send it back to your Tigerbuy shopping cart to finish building your **Requisition**.

If you want to leave without bringing your items into Tigerbuy, Click the blue **Cancel Punchout** button.



Your Tigerbuy Shopping cart now has all of your Staples items in it. You will have several chances to edit your items and your order information. The cart is for keeping items or removing them. Details of the purchase will happen in the Requisition stage.

You will want to give your cart a name, such as “new office” or “grant supplies” to help you and your approver recognize it. This will assist your approver with approving your request via email.



You have the ability to act on the line items in your cart. Click the check box on the line(s) and then click the blue pulldown arrow above the items section to see your options. You can work on them individually or act on several lines at once. When everything is ready to go, click the blue **Proceed to Checkout** button. That will move to the Requisition stage.

The screenshot shows a shopping cart titled "Shopping Cart • Shopping Cart" with a total of 9 items valued at 187.65 USD. The supplier is Staples Contract and Commercial Inc. The cart contains two items:

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Staples Remanufactured Black High Yield Ink Cartridge Replacement for Canon PG-240 XL (TR5206B001/ST5206B001)	1004266	EA	13.01	1 EA	13.01
2 8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)	324791	CT	39.32	4 CT	157.28

Annotations include:

- A red arrow pointing to the blue pulldown arrow above the items section.
- A red arrow pointing to the "Proceed to Checkout" button.
- A red arrow pointing to the checkbox next to the first item.
- A red arrow pointing to the "expand" link in the item details section.
- A red arrow pointing to the "Add to Favorites" option in the dropdown menu.

You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section.

The screenshot shows a draft requisition titled "Requisition • 3689743" with a total value of 83.78 USD. The requisition is in the "Draft" stage and contains the following sections:

- General:** Cart Name (Please name your cart!), Description (no value), Priority (Normal), Prepared by (Kerri Reece), Prepared for (Kerri Reece).
- Shipping:** Ship To (Contact Name Procurement Serv, Phone +1 901-678-3775, Email kreece@memphis.edu, 115 Admin Bldg, 3720 Alumni Dr, Memphis, TN 38152-3370, United States), Delivery Options (Expedite, Ship Via Best Carrier-Best Way, Requested Delivery Date no value).
- Billing:** Bill To (University of Memphis, Attn: Accounts Payable, 275 Administration Bldg, Memphis, TN 38152-3370, United States), Billing Options (Accounting Date no value).

Annotations include:

- A red arrow pointing to the pencil icon in the General section header.
- A red arrow pointing to the pencil icon in the Shipping section header.
- A red arrow pointing to the pencil icon in the Billing section header.
- A red box around the "Correct these issues" message: "You are unable to proceed until addressed. Required: Account".
- A red box around the "Total (83.78 USD)" and "What's next for my order?" links.
- A red box around the "Bill to should be accounting" text.
- A red box around the "Delivery is not editable for Staples catalog purchases" text.
- A red box around the "Check that your ship to is correct" text.

Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.

Accounting Codes

...

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	no value Required	4650 Gen Admin and Logistical Services	no value

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 Staples 30% Recycled Copy Paper 8.5" x 11", 20 lbs., White, 5000 Sheets/Carton (112350/461757)	492072	CT	49.97	1 CT	49.97	...
<div> <div>ITEM DETAILS</div> <div> <div>Manufacturer Name</div> <div>Domtar</div> </div> <div> <div>Contract:</div> <div>no value</div> </div> <div> <div>Internal Note</div> <div>no value</div> </div> <div> <div>Manufacturer Part Number</div> <div>112350/461757</div> </div> <div> <div>Taxable</div> <div>✗</div> </div> <div> <div>Internal Attachments</div> <div>Add</div> </div> <div> <div>Supplier Part Auxiliary ID</div> <div>492072</div> </div> <div> <div>Commodity Code</div> <div>645</div> </div> <div> <div>PO Clauses</div> <div>Add</div> </div> <div>more info...</div> </div>						

| 2 Staples Remanufactured Black/Color High Yield Ink Replacement for Canon PG-240XL/CL-241XL (STPG240CL2412PK), 2/Pack | 1004296 | PK | 33.81 | 1 PK | 33.81 |  |
| ITEM DETAILS  Manufacturer  CLOVER TECHNOLOGIES GROUP  Contract:  no value  Internal Note  no value | | | | | | |

Total (83.78 USD)

What's next for my order?

Override

Ship To

Delivery Options

Bill To

Accounting Codes

Internal Note

Remove

Add to Favorites

Move to Another Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

If you've set up Code Favorites in your profile, use the heart to access the list. Use the plus sign (+) to add another list to split the entire order into multiple accounting codes.

Edit Accounting Codes

Accounting Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity
U	110001	542000	74500	4650	Search

+

✓

♥

Code Favorites

Save

Close

Grant Program

Procurement

Procurement complete

Startup fund - Dr. X

Travel

Edit Accounting Codes

Accounting Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	% of Price
U	110001	542000	74500	4650	Search	Enter %
U	110001	542000	74500	4650	Search	Enter %

Invalid distribution value

Invalid distribution value

Split Total 0%

(0.00 USD)

Percentage is not equal to 100%

If your order is ready, click the blue **Place Order** button. Under the button you can see the next step your order will take. Scroll down to see the entire workflow.

Requisition • 3689743

Place Order

Summary
Taxes/S&H
PO Preview
Comments
Attachments
History

General

Cart Name

Please name your cart!

Description

no value

Priority

Normal

Prepared by

Kerri Reece

Shipping

Ship To

Contact Name

Procurement Serv

Phone

+1 901-678-3775

Email

kreece@memphis.edu

115 Admin Bldg

3720 Alumni Dr

Memphis, TN 38152-3370

Billing

Bill To

University of Memphis

Attn: Accounts Payable

275 Administration Bldg

Memphis, TN 38152-3370

United States

Draft

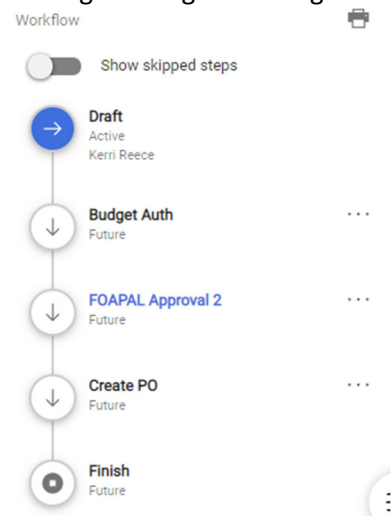
Total (83.78 USD)

>

What's next for my order?

>

Your Requisition has now been submitted for approval.  
It will go through the budget check and route to your financial manager for approval.



You will now get a notification in the system, and an email if you have that set up:

✓

Requisition 3689743 Submitted

Summary

Requisition number

3689743

Requisition status

Pending

Cart name

Please name your cart!

Requisition date

1/17/2023

Requisition total

83.78 USD

Number of line items

2

Options

Print

Recent orders

Return to your home page

support@sciquest.com

Your Requisition has Bee...

1:24 PM

CAUTION: This email originated from out...

Re: REQUISITION SUBMITTED FOR APPROVAL #: 3689743

Cart Name: Please name your cart!

Prepared by: Kerri Reece

Dear Kerri Reece,

Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.

[View Requisition](#)

If you have any questions with regard to your requisition, please contact your SelectSite Support Team.

Support Team Contact Information: Accounts Payable @ 1-901-678-3826 or [accountspayable@memphis.edu](mailto:accountspayable@memphis.edu) For Procurement questions use the below information: +1 901-678-2265 [procurement@memphis.edu](mailto:procurement@memphis.edu)

Thank you,  
University of Memphis

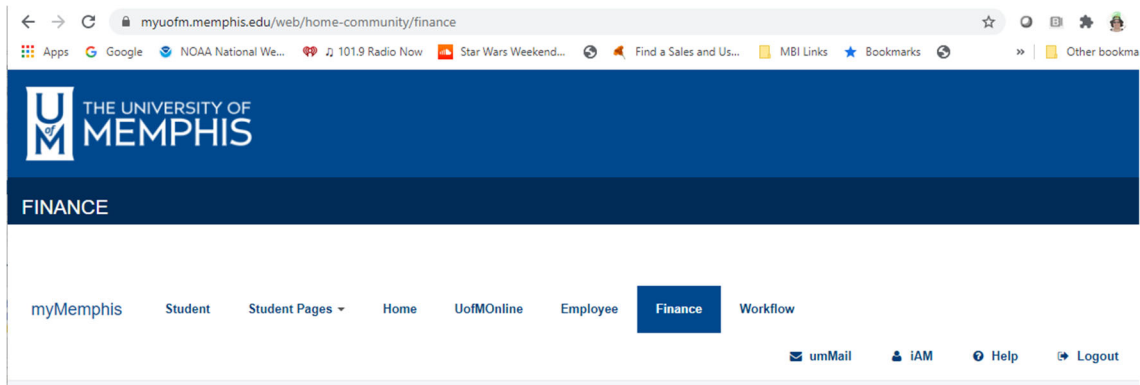
Your approved requisition will flow through Procurement and Banner will create an Encumbrance on your budget and issue a P0 number. Tigerbuy will then send the P0 to Staples electronically. Please note that once a staples order is transmitted electronically, we can't change or cancel it. Any corrections would need to happen through returns.

When you physically receive the items, you will need to **Receipt** them in the system (see Receipting instructions)

Should you need to make a **Return**, please see Return instructions.

## How to – Make a basic Amazon order

From MyMemphis, go to the Finance tab and choose Tigerbuy Production



Tigerbuy



Tigerbuy (Production) 

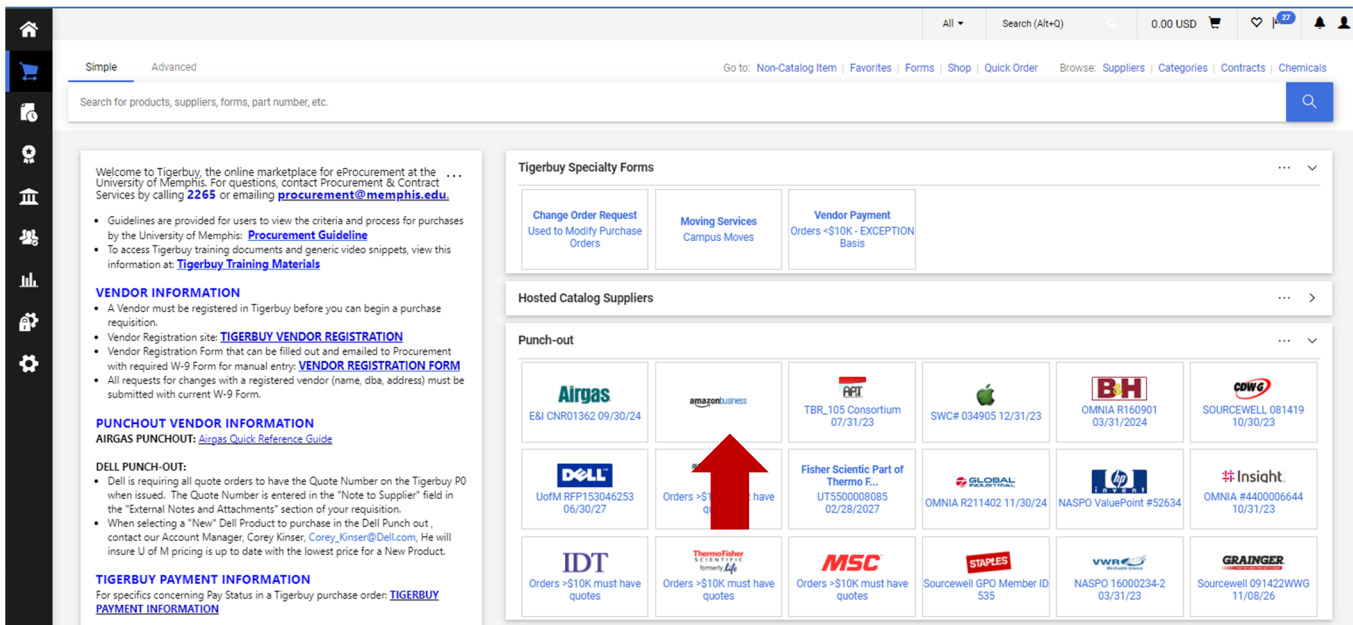
More information related to Tigerbuy can be found on the [Tigerbuy Web site](#).

[Tigerbuy \(Test\)](#)

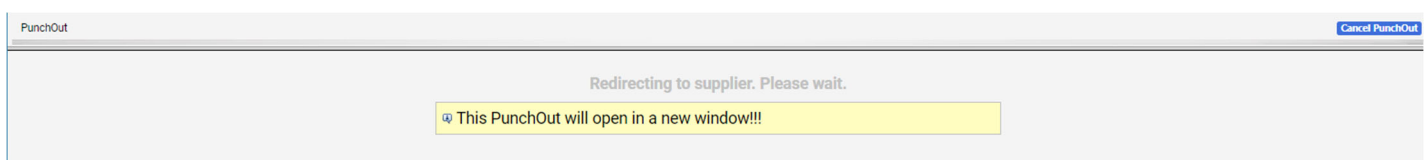
[Vendor Performance Evaluation](#) - For departments to leave feedback on vendors.

[Diversity Suppliers List](#)

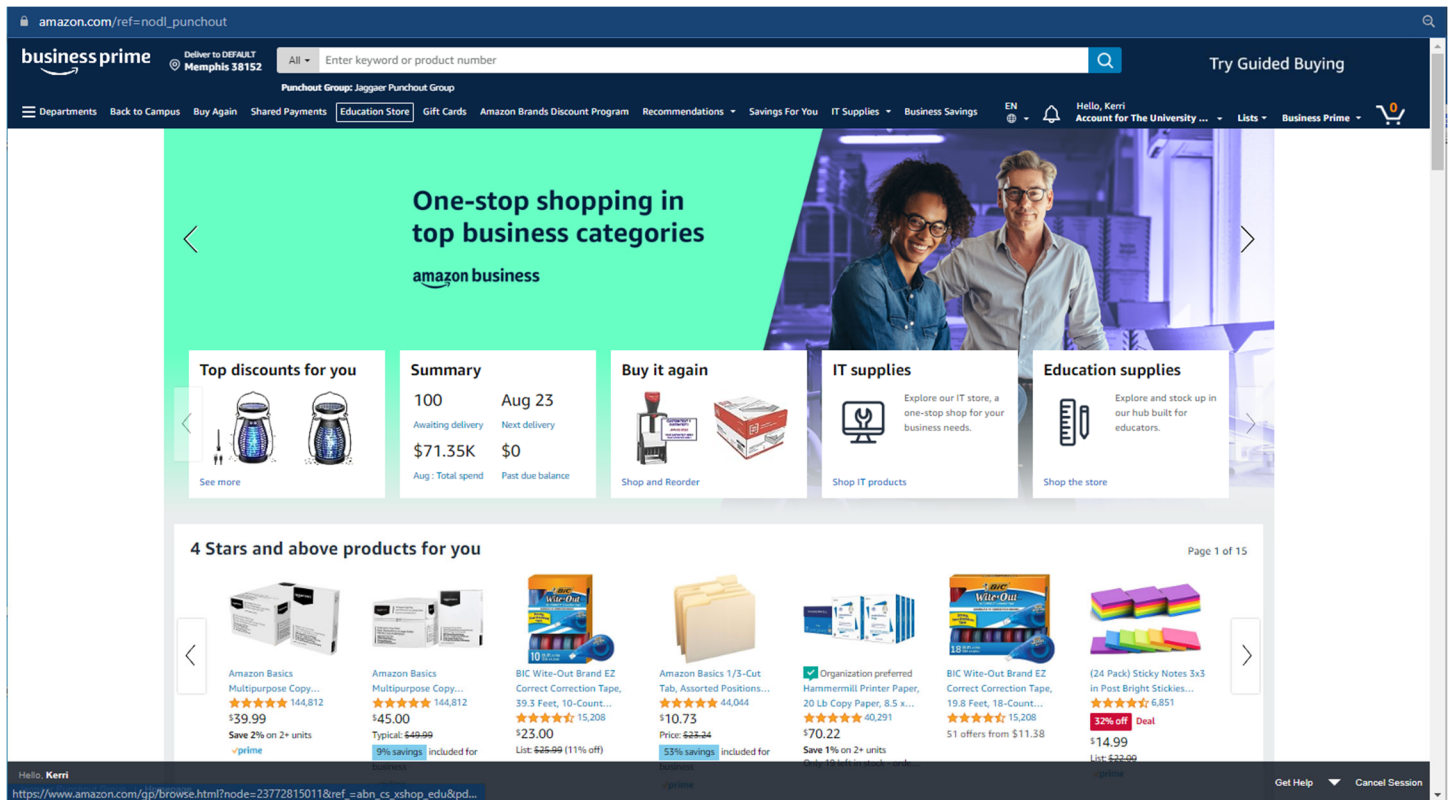
This will bring you to the shopping home page. Click on the **Amazon business** Punch Out Catalog button:



A screen comes up telling you the punchout will open in a new window.



The Amazon home page opens in a separate window.

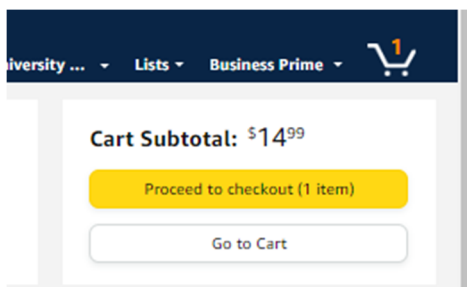


You will shop as normal, putting items into your cart.

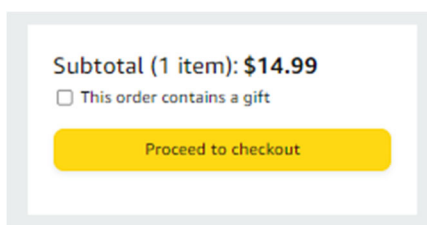
\*Important note: The catalog has been set up to show allowable product categories, however some items fall into an allowable category, but are not appropriate for your area or purpose. It is your responsibility to ensure your purchases comply with all University policies and guidelines. \*

Blocked items are generally items that should be purchased from a different vendor.

Once you have chosen your items, go to your cart to get ready for checkout. The cart shows your items, quantities, and prices. You can adjust quantities or remove items from the cart.



When all is as you wish, click **Proceed to Checkout**. This is going to take you to the Amazon checkout page.





Sections 1, 2, and 3 will autofill. Leave 1 and 2 alone. If this is your first Amazon punchout order, you will get the Default company address in Section 3. **THIS IS OK.** You will choose the address you need when you complete the order in Tigerbuy. Click **Use this address**.

1

Group

Jaggaer Punchout Group  
Group under The University of Memphis

Change

2

Business order information

Disabled

3

Choose a shipping address

Does this order need to be delivered to a recipient other than the name in your address book?

Deliver To:  This will be applied to only this order.

Group Jaggaer Punchout Group addresses

☒ Contact Name Jackie Robinson, Phone +1 901-678-226 5, Email kreece@memphis.edu, AD115, 115 Administration Bldg, 3720 Alumni Dr, Memphis, TN, 38152-3370, United States

☐ **DEFAULT ADDRESS - SELECT ADDRESS IN JAGGAER 946 E PARK LOOP, MEMPHIS, TN, 38152-4040, United States, Phone: 901-678-2408** [Edit address](#)

+ Add a new address

Use this address

Section 4 choose **Pay by Invoice**. Click **Use this payment method**.

4 Choose a payment method

Kerri, did you know your organization is setup to use Pay by Invoice?  
Select Pay by Invoice at checkout to buy now and pay later with no interest or fees.

Jaggaer Punchout Group credit and debit cards

+ Add a credit or debit card > Amazon accepts all major credit cards.

Jaggaer Punchout Group line of credit

☒ **Pay By Invoice**  
 Provided by your organization

Other payment methods

+ Add a personal checking account  
Use your US based personal checking account.  
[Learn more](#)

+ Add a business checking account  
Use your US based business checking account.  
[Learn more](#)

Use this payment method



Section 5 allows you to choose your shipping day or a pickup location. You will get the warning message that your order requires approval. That approval will happen in Tigerbuy. Click **Submit order for Approval**. This is going to take your cart / order and send it back to your Tigerbuy shopping cart to finish building your **Requisition**.

## 5 Review items and shipping

⚠ This order requires approval.

ℹ There are 2 important messages about your order.

- ✓ If your hours ever change at an address, click [Edit delivery preferen...](#)
- ✓ If tax exemption is applied to this order, you acknowledge your tax exemption...

Select FREE Amazon Day Delivery to receive orders in fewer boxes on a single day.

**Estimated Delivery: Depends on Approval** For example, if approved now: Tomorrow, Aug. 24 If you order in the next 13 hours and 3 minutes (Details)  
Items shipped from Amazon.com

 (24 Pack) Sticky Notes 3x3 in Post  
Bright Stickies Colorful Super Sticking  
Power Memo Pads, Strong Adhesive,  
74 Sheets/pad  
**\$14.99** ✓prime & FREE Returns ▾  
Qty: 1 ▾  
Sold by: Vanpad  
[Add gift options](#)  
Tax Exemption Applied.

Choose your Prime delivery option:

- ☒ **Tomorrow, Aug. 24**  
FREE One-Day Delivery
- ☐ **Monday, Aug. 28**  
FREE Amazon Day Delivery  
Get your orders together in fewer boxes and deliveries each Monday.  
[Change delivery day](#)

Or choose your Prime pickup option: Pick up at Amazon Campus ([View Location](#))

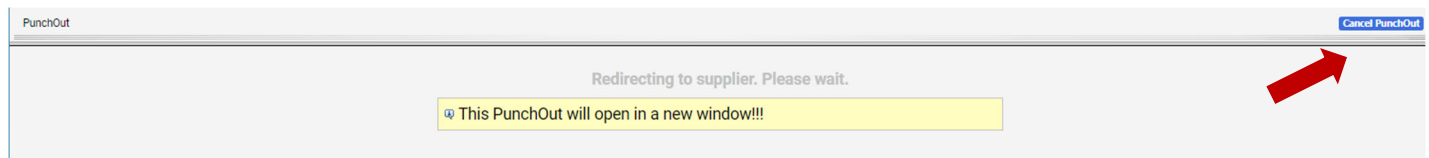
- ☐ **Thursday, August 24**  
FREE One-Day Delivery

[Submit order for approval](#)

**Order total: \$14.99**

By placing your order, you agree to the Amazon Business Accounts Terms and Conditions and Amazon's privacy notice.

If you want to leave without bringing your items into Tigerbuy, close the Amazon window and click the blue **Cancel Punchout** button.



Your Tigerbuy Shopping cart now has all of your Amazon items in it. You will have several chances to edit your items and your order information. The cart is for keeping items or removing them. Details of the purchase will happen in the Requisition stage.

You will want to give your cart a name, such as “new office” or “grant supplies” to help you and your approver recognize it. This will assist your approver with approving your request via email.

You have the ability to act on the line items in your cart. Click the check box on the line(s) and then click the blue pulldown arrow above the items section to see your options. You can work on them individually or act on several lines at once. When everything is ready to go, click the blue **Proceed to Checkout** button. That will move to the Requisition stage.

Shopping Cart • Shopping Cart

9 Items

Staples Contract and Commercial Inc • 9 Items • 187.65 USD

SUPPLIER DETAILS **TN** PO Purchase/Change Orders 2 : 4575 Pleasant Hill Rd, Memphis, Tennessee 38118-7516 United States

Contract no value PO Number To Be Assigned

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 10/26/2023 10:37:51 AM

- Staples Remanufactured Black High Yield Ink Cartridge Replacement for Canon PG-240 XL (TR5206B001/ST5206B001)
- 8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)
- BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Staples Remanufactured Black High Yield Ink Cartridge Replacement for Canon PG-240 XL (TR5206B001/ST5206B001)	1004266	EA	13.01	1 EA	
<b>ITEM DETAILS</b>					
Manufacturer Name	CLOVER TECHNOLOGIES GROUP, LLC	Contract:	Internal Note Jackie		
Manufacturer Part Number	ST5206B001	Taxable	<input type="checkbox"/>		
Supplier Part Auxiliary ID	1004266	Commodity Code	600		
<a href="#">more info...</a>					
2 8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)	324791	CT	39.32	4 CT	157.28
<b>ITEM DETAILS</b>					

Annotations: A red arrow points to the blue pulldown arrow above the items section. Another red arrow points to the 'Proceed To Checkout' button. A third red arrow points to the 'Add to Favorites' option in the dropdown menu.

Summary Details

- Add to Favorites
- Remove Selected Items
- Remove All Items
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Add to PO Revision
- Change Commodity Code

You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section.

Requisition • 175971269

Summary PO Preview Comments Attachments History

**General**

Cart Name Please name your cart

Description no value

Priority Normal

Prepared by Kerri Reece

Prepared for Kerri Reece

**Shipping**

Ship To

Contact Name Jackie Robinson  
Phone +1 901-678-2265  
Email kreece@memphis.edu  
115 Administration Bldg  
3720 Alumni Dr  
Memphis, TN 38152-3370  
United States

**Delivery Options**

Expedite ☒

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

**Billing**

Bill To

University of Memphis  
Attn: Accounts Payable  
Email kreece@memphis.edu  
275 Administration Bldg  
Memphis, TN 38152-3370  
United States

**Credit Card Info**

No credit card has been assigned.

**Billing Options**

**Accounting Codes**

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement and Contract Services	74500 Supplies	4650 Gen Admin and Logistical Services	no value

Summary **Draft**

Total (14.99 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.

Subtotal 14.99

What's next for my order?

Next Step FOAPAL Approval 2

Approvers Becker, Deborah  
Curry, Ladonnal  
Kurapati, Raajkumar  
Mueller, William  
Ninan, George  
Pappas, Nick  
Thomas, William

Workflow

Show skipped steps

Draft Active Kerri Reece

Annotations: A red box highlights the 'General' section header. Another red box highlights the 'Shipping' section header. A third red box highlights the 'Billing' section header. A fourth red box highlights the 'Delivery Options' section. A fifth red box highlights the 'Accounting Codes' section. A sixth red box highlights the 'Draft' status in the summary. A seventh red box highlights the 'Bill to should be accounting' text. An eighth red box highlights the 'Delivery is not editable for Amazon catalog purchases' text. A ninth red box highlights the 'Check that your ship to is correct' text.

Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.

If you’ve set up Code Favorites in your profile, use the heart to access the list. Use the plus sign (+) to add another list to split the entire order into multiple accounting codes.

Accounting Codes

...

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	no value Required	4650 Gen Admin and Logistical Services	no value

Amazon Capital Services Inc · 1 Item · 14.99 USD

SUPPLIER DETAILS

PO Purchase/Change Orders 1 : PO Box 81207, Seattle, Washington 98108-1207 United States

Contract

no value

PO Number

To Be Assigned

PO Clauses

Add/View

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 (24 Pack) Sticky Notes 3x3 in Post Bright Stickies Colorful Super Sticking Power Memo Pads, Strong Adhesive, 74 Sheets/pad	B07VRYX57R	EA	14.99	Qty: 1 EA	14.99	... <input type="checkbox"/>

ITEM DETAILS

Manufacturer Name

Vanpad

Contract:

no value

Internal Note

Ship To

Manufacturer Part Number

Vanpad-4

Taxable

×

Internal Attachments

Delivery Options

Supplier Part Auxiliary ID

134-2009676-5127252,1

Commodity Code

645

PO Clauses

Bill To

more info...

Accounting Codes

Internal Note

Override

Remove

Add to Favorites

Move to Another Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

If your order is ready, click the blue **Place Order** button.

Requisition · 175971269

Summary

PO Preview

Comments

Attachments

History

General

Shipping

Billing

Summary

Draft

Place Order

Your Requisition has now been submitted for approval. It will go through the budget check and route to your financial manager for approval.

Your approved requisition will flow through Procurement and Banner will create an Encumbrance on your budget and issue a PO number. Tigerbuy will then send the PO to Amazon electronically.

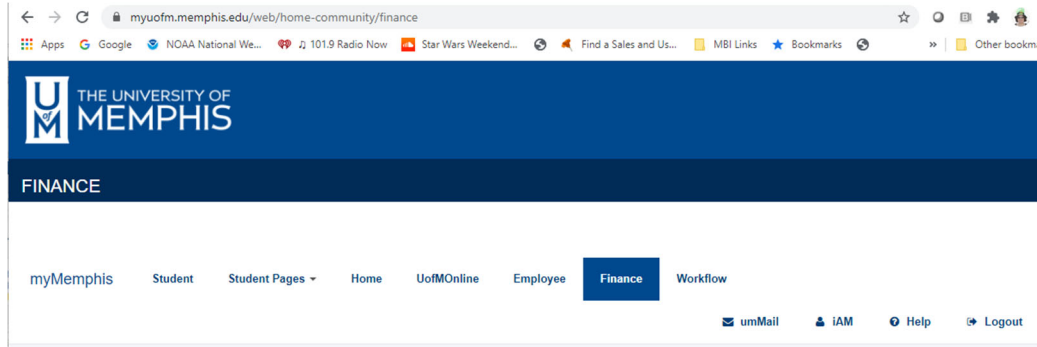
When you physically receive the items, you will need to **Receipt** them in the system (see Receipting instructions)

Should you need to make a **Return**, please see Return instructions.

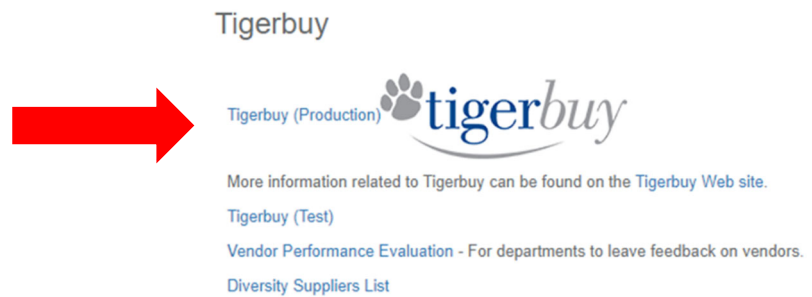
## How to - Tigerbuy Non-Catalog Order

Purchase information for a Non-catalog order can be from a quote, agreement, or vendor communication. The Non-catalog process involves the Requester typing the purchase information into the form to fill a shopping cart.

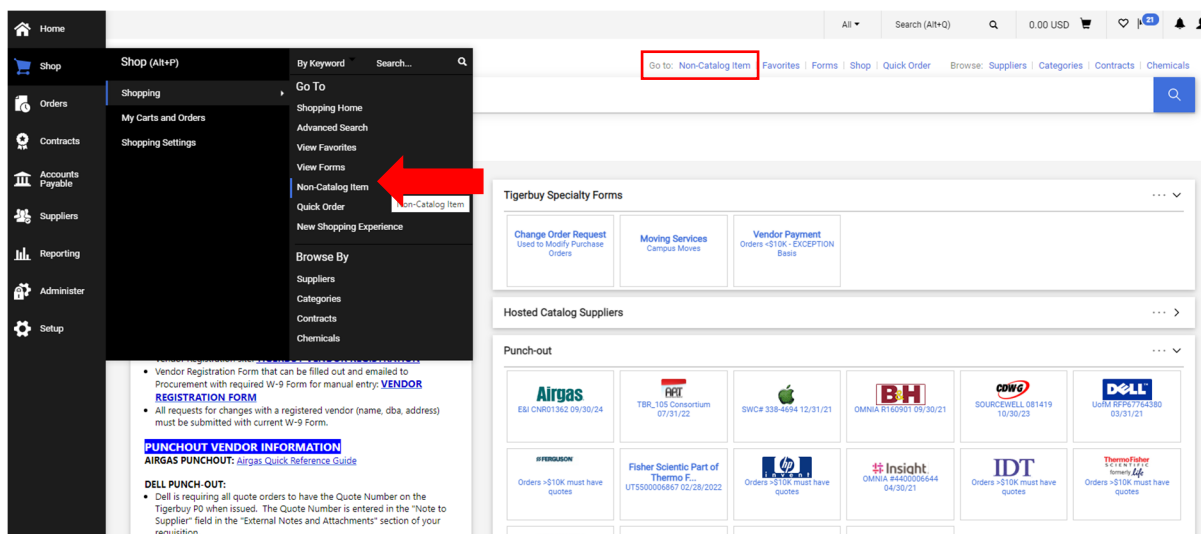
Log into My Memphis & go to the **Finance** tab:



Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**




Tigerbuy opens on the Home screen. Click on **Go to: Non-Catalog item** at the top or **Shop / Shopping / Non-Catalog item** on the left menu.



**Add Non-Catalog Item**

Existing Supplier

Select Supplier 

**Item**

Product Description ★  254 characters remaining

Catalog No.

Quantity ★

Price Estimate

Packaging EA - Each

**Additional Details**

Manufacturer Name  Manufacturer Part No.

Product Flags

- ☐ Controlled substance
- ☐ Recycled
- ☐ Hazardous material
- ☐ Select Agent
- ☐ Toxin
- ☐ Energy Star
- ☐ Green

**Add Internal Attachments**

Add Internal Attachments

Save Save And Add Another Close


Type in your Vendor or use the Search feature. A Vendor must be in the Tigerbuy system to begin entry. (see end note)

Type in your Item description and any other information needed to identify what you are purchasing.

If you have Quotes or other documents to attach, use the Add Internal Attachments button.

Click **Save** to send your item to the Cart or **Save and add another** to send the item to the cart and add another item. When entering information from a Vendor quote, **each line item from the quote must be entered separately**. This is required for accurate shipment, receipt of goods, and payment for each item from quote.

When you are sent back to the Home screen, navigate to your cart to finalize your Requisition.

All Search (Alt+Q) 150.00 USD 

**My Cart**

sink repair

Quantity: 1

Price: 150.00 USD

View My Cart

Checkout

150.00 USD

Your Tigerbuy Shopping cart now has all of your non-catalog items in it. You will have several chances to edit your items and your order information. The cart is for keeping items or removing them. Details of the purchase will happen in the Requisition stage.

You will want to give your cart a name, such as “new office” or “grant supplies” to help you and your approver recognize it. This will assist your approver with approving your request via email.

Review your cart. You have the ability to act on the line items in your cart. Click the check box on the line(s) and then click the blue pulldown arrow above the items section to see your options. You can work on them individually or act on several lines at once. When everything is ready to go, click the blue **Proceed to Checkout** button. That will move to the Requisition stage.

Shopping Cart • Shopping Cart

9 Items

Staples Contract and Commercial Inc • 9 Items • 187.65 USD

SUPPLIER DETAILS **TN** PO Purchase/Change Orders 2 : 4575 Pleasant Hill Rd, Memphis, Tennessee 38118-7516 United States

Contract no value PO Number To Be Assigned

Need to make changes? **MODIFY ITEMS** | **VIEW ITEMS** Item(s) was retrieved on: 10/26/2023 10:37:51 AM

- Staples Remanufactured Black High Yield Ink Cartridge Replacement for Canon PG-240 XL (TR5206B001/ST5206B001)
- 8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)
- BIC Round Stic Xtra-Life Ballpoint Pen, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Staples Remanufactured Black High Yield Ink Cartridge Replacement for Canon PG-240 XL (TR5206B001/ST5206B001)	1004266	EA	13.01	1 EA	
<p>ITEM DETAILS</p> <p>Manufacturer Name CLOVER TECHNOLOGIES GROUP, LLC Contract: Internal Note Jackie</p> <p>Manufacturer Part Number ST5206B001 Taxable <input type="checkbox"/> 994 characters remaining expand clear</p> <p>Supplier Part Auxiliary ID 1004266 Commodity Code 600</p> <p>more info...</p>					
2 8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)	324791	CT	39.32	4 CT	157.28
<p>ITEM DETAILS</p>					

Summary Details

Add to Favorites  
Remove Selected Items  
Remove All Items  
Move to Another Cart  
Add to Draft Cart or Pending PR/PO  
Add to PO Revision  
Change Commodity Code

Proceed To Checkout

You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section. Documents can be attached in the Notes & Attachments section. \*It is helpful to add an internal note if a signature is / is not required on an attached document.

Requisition • 3689913

Summary Taxes/S&H PO Preview Comments Attachments History

General

Cart Name Please name your cart!

Description no value

Priority Normal

Prepared by Kerri Reece

Prepared for Kerri Reece

Shipping

Ship To

Contact Name Procurement Serv  
Phone +1 901-678-3775  
Email kreece@memphis.edu  
115 Admin Bldg  
3720 Alumni Dr  
Memphis, TN 38152-3370  
United States

Delivery Options

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Billing

Bill To

University of Memphis  
Attn: Accounts Payable  
275 Administration Bldg  
Memphis, TN 38152-3370  
United States

Credit Card Info

No credit card has been as

Billing Options

Accounting Date no value

Accounting Codes

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	no value Required	4650 Gen Admin and Logistical Services	no value

Internal Notes and Attachments

Internal Note no value

Internal Attachments Add

External Notes and Attachments

Note to all Suppliers no value

Attachments for all suppliers Add

Bill to should be accounting

Check that your ship to is correct

Draft

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


Required: Account

Total (150.00 USD)

What's next for my order?

Place Order

Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.

Accounting Codes						 ...
Chart	Fund	Organization	Account	Program	Activity	
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	74500 Supplies	4650 Gen Admin and Logistical Services	no value	

1 Item

A Parker & Sons Plumbing LLC · 1 Item · 150.00 USD

SUPPLIER DETAILS

PO Purchase/Change Orders 6 : 3288 Winbrook Dr, Memphis, Tennessee 38116-3644 United States


Contract no value PO Number To Be Assigned

PO Clauses [Add](#)

Item	Catalog No.	Size/Packaging	Unit
1 Sink repair		EA	

ITEM DETAILS

Contract: no value

Taxable 

Commodity Code no value

Internal Note

Internal Attachments

External Note

Attachments for supplier

PO Clauses

Override

Ship To

Delivery Options

Bill To

Credit Card Info

Accounting Codes

Internal Note

Remove

Add to Favorites

Move to Another Cart


Add to Draft Cart or Pending PR/PO

Add to PO Revision

If you've set up Code Favorites in your profile, use the heart to access the list. Use the plus sign (+) to add another list to split the entire order into multiple accounting codes. Save any changes.

Edit Accounting Codes

Accounting Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	
U	110001	542000	74500	4650	Search	 ...

Grant Program



Procurement

Procurement complete

Startup fund - Dr. X

Travel

+

Code Favorites

Save Close

★ Required fields

Edit Accounting Codes

Accounting Codes

Chart *	Fund *	Organization *	Account *	Program *	Activity	% of Price
U	110001	542000	74500	4650	Search	Enter %
U	110001	542000	74500	4650	Search	Enter %

Invalid distribution value

Invalid distribution value

Split Total 0%  
(0.00 USD)  
Percentage is not equal to 100%



If your order is ready, click the blue **Place Order** button. Under the button you can see the next step your order will take. Scroll down to see the entire workflow.

Requisition • 3689743

Place Order

SummaryTaxes/S&HPO PreviewCommentsAttachmentsHistory

General

Cart Name

Please name your cart!

Description

no value

Priority

Normal

Prepared by

Kerri Reece

Shipping

Ship To

Contact Name

Procurement Serv

Phone

+1 901-678-3775

Email

kreece@memphis.edu

115 Admin Bldg

3720 Alumni Dr

Memphis, TN 38152-3370

Billing

Bill To

University of Memphis

Attn: Accounts Payable

275 Administration Bldg

Memphis, TN 38152-3370

United States

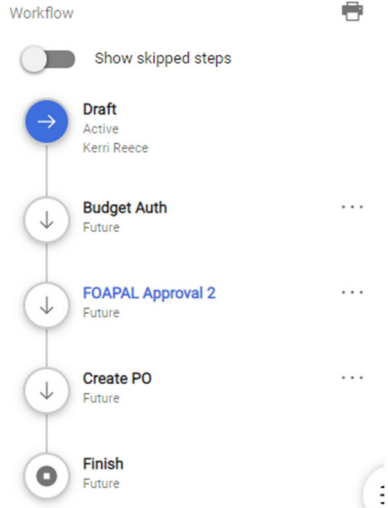
Draft

Total (83.78 USD)

What's next for my order?

Your Requisition has now been submitted for approval.

It will go through the budget check and route to your financial manager for approval.



You will now get a notification in the system, and an email if you have that set up:

Requisition 3689743 Submitted

Summary

Requisition number

3689743

Requisition status

Pending

Cart name

Please name your cart!

Requisition date

1/17/2023

Requisition total

83.78 USD

Number of line items

2

Options

Print

Recent orders

Return to your home page

support@sciquest.com

Your Requisition has Bee...

1:24 PM

CAUTION: This email originated from out...

Re: REQUISITION SUBMITTED FOR APPROVAL #: 3689743

Cart Name: Please name your cart!

Prepared by: Kerri Reece

Dear Kerri Reece,

Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.

[View Requisition](#)

If you have any questions with regard to your requisition, please contact your SelectSite Support Team.

Support Team Contact Information: Accounts Payable @ 1-901-678-3826 or [accountspayable@memphis.edu](mailto:accountspayable@memphis.edu) For Procurement questions use the below information: +1 901-678-2265 [procurement@memphis.edu](mailto:procurement@memphis.edu)

Thank you,  
University of Memphis

Your approved requisition will flow through Procurement and may stop for any signatures or additional approvals needed. Banner will create an Encumbrance on your budget and issue a PO number. Tigerbuy will then send the PO to the vendor.

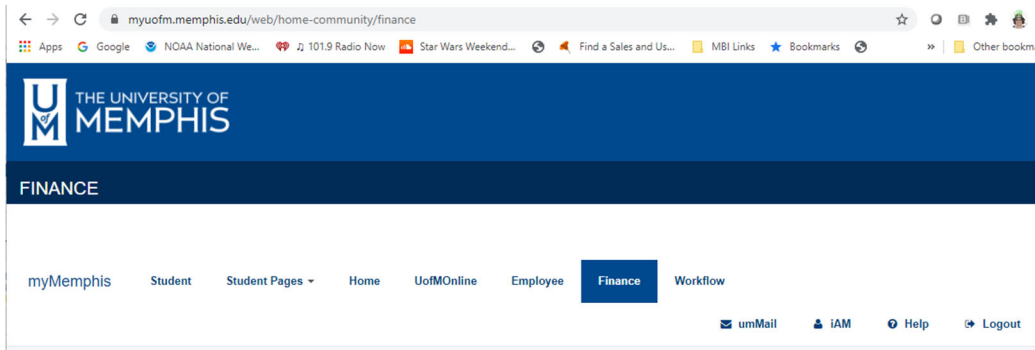
When you physically receive the item or service, you will need to **Receipt** it in the system (see Receipting instructions)

Should you need to make a **Change** once PO is issued, please see **Change Order** instructions.

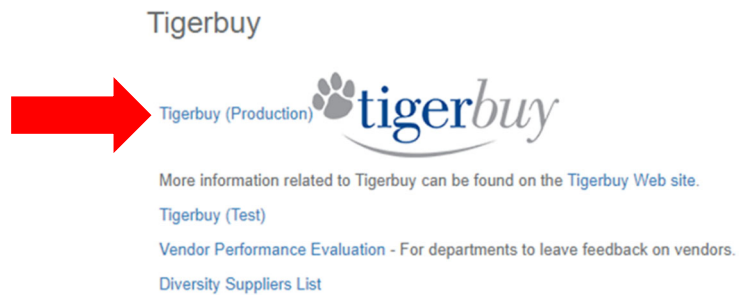
\*If your Vendor is not in the Tigerbuy system, they will need to register. Please see the Procurement Vendor page <https://www.memphis.edu/procurement/tigerbuy/vendor.php> "Doing Business with UofM" for current links & Instructions.

# How to - Tigerbuy Receipting

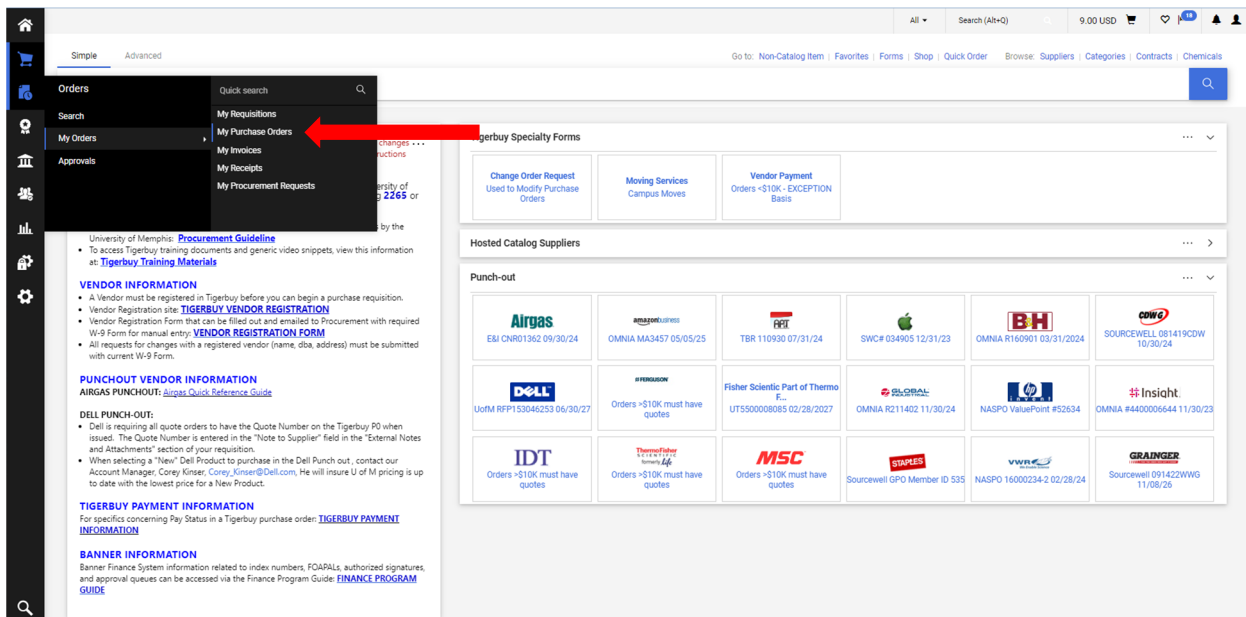
Log into My Memphis & go to the **Finance** tab:



Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**



Tigerbuy opens on the Home screen. Click on **Orders / My Orders / My Purchase Orders** on the left menu.



This brings up a list of your Purchase Orders in progress. The left menu contains filters that can help you narrow your search. Click on the PO number you want to receipt.

Orders > Search > Purchase Orders

**Search Purchase Orders** Save As Pin Filters Export All

Quick Filters My Searches

Created Date: Last 90 days Quick search ? Add Filter Clear All Filters 20 Per Page

Supplier	PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
...	PO280490	Staples Contract and Commercial Inc	1/14/2021 2:31:28 PM	Completed	3153481	Kerri Reece	Sent To Supplier	No Matches	342.62 USD
...	PO280489	Graybar Electric Co Inc	1/14/2021 2:30:11 PM	Completed	3153454	Kerri Reece	Sent To Supplier	No Matches	2,498.11 USD
...	3248303	W W Grainger Inc	1/14/2021 2:29:12 PM	Pending	3153434	Kerri Reece	No Shipments	No Matches	96.13 USD
...	PO280488	Staples Contract and Commercial Inc	1/14/2021 2:26:27 PM	Completed	3137281	Kerri Reece	Sent To Supplier	No Matches	149.43 USD
...	3248300	Staples Contract and Commercial Inc	1/14/2021 2:23:42 PM	Pending	3132986	Kerri Reece	No Shipments	No Matches	34.09 USD
...	PO280481	Staples Contract and Commercial Inc	12/3/2020 4:10:52 PM	Completed	3129961	Kerri Reece	Sent To Supplier	No Matches	70.43 USD

20 Per Page

Your PO opens. Click on the ellipses on the right and choose **Create Receipt**.

Purchase Order • Staples Contract and Commer... • P0310460 Revision 0

Status Summary Revisions 1 Confirmations Shipments Receipts 3 Invoices Comments Attachments History

General Information

PO/Reference No. **P0310460**

Revision No. 0

Supplier Name **Staples Contract and Commercial Inc**

Purchase Order Date 10/25/2022

Total 229.22

Document Status

A/P status Open

Workflow **Completed**  
(10/27/2022 9:41 AM)

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: [view](#)

cXML (Electronic Integration) no value

0.00

6 of 9 Results

[Add Comment](#)  
[Add Notes to History](#)  
[Cancel PO](#)  
[Finalize Revision](#)  
[Create Receipt](#)  
[Create Credit Memo](#)  
[Create Invoice](#)  
[Print Fax Version](#)  
[Send Test PO](#)



This will open the **Create Receipt** screen. Here you will choose which lines to work with and what kind of receipt to create: cost or quantity.

The screen contains a list of your PO line items. It defaults to all lines checked.

- To receive all lines, leave the checks and choose your receipt type at the bottom.
- To receive partially, uncheck any lines you don't want to receive or use the top check box to uncheck all lines and only check the ones you need. Best practice is NOT to include 0 quantity lines on your return. Then choose your receipt type at the bottom.

**P0320928: Create Receipt**✕

	Item Type	Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>
1	None	--	--	Canon 240XL/241XL Black and TriColor High Yield Ink Cartridge, 2/Pack with 4x6 photo paper (5206B005)	752960	PK	56.20	1 PK	56.20	<input checked="" type="checkbox"/>
2	None	2	--	Pilot G2 Retractable Gel Pens, Fine Point, Purple Ink, Dozen (31029)	462337	DZ	11.91	2 DZ	23.82	<input checked="" type="checkbox"/>
3	None	3	--	Post-it Super Sticky Notes, 3" x 3", Supernova Neons Collection, 70 Sheets/Pad, 24 Pads/Pack (654-24SSMIA-CP)	2095545	PK	24.48	3 PK	73.44	<input checked="" type="checkbox"/>
4	None	2	--	TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 8 Reams/Carton (TR59702)	24472187	CT	36.71	2 CT	73.42	<input checked="" type="checkbox"/>



Create Quantity ReceiptCreate Cost ReceiptCancel

When you click to create the receipt type you need, your receipt will come up with only the lines that were checked.

You don't need to enter anything on the top.

Receipt Name	<input type="text" value="2023-11-06 kreece 04"/>	Carrier	<div>Other <span>▼</span></div> <input type="text"/>
Receipt No	To Be Assigned	Tracking No.	<input type="text"/>
Receipt Date	<div><input type="text" value="11/6/2023"/><div>mm/dd/yyyy</div></div>	Flexible Text Field	<input type="text"/>
Packing Slip No.	<input type="text"/>	Flexible Drop Down	<div>▼</div>
Supplier Name	Staples Contract And Commercial Inc	Attachments	<a href="#">Add</a>
Received by	Kerri Reece	Notes	<div><input type="text"/><div>1000 characters remaining</div></div>
Receipt Address	<div><div>▼</div><div>Contact Name Their name Phone +1 901-678-2265 Email kreece@memphis.edu 115 Admin Bldg 3720 Alumni Dr Memphis, TN 38152-3370 United States</div></div>		

Scroll down to the Line Details. Enter the quantity of each item that you are receiving. The Line Status defaults to “Received”.

Quantity Receipt • 598178 Save Updates Complete

Summary Comments Attachments History

PO • P0320928

Line	Item	Catalog No.	Quantity	Status
1	Canon 240XL/241XL Black and TriColor High Yield Ink Cartridge, 2/Pack with 4x6 photo paper (5206B005)	752960	1 PK	Received

ITEM DETAILS

Contract No. - Previous Receipts Y00002150 Y00002148

Line Item Type -

Attachments Add

Notes

1000 characters remaining

Summary

Draft

Details

Creation Date 11/6/2023 11:52:37 AM

Source Manual

Supplier Staples Contract and Commercial Inc

Received by Kerri Reece

Total (56.20 USD)

Related Documents

Purchase Order: P0320928

You still have the ability to remove the lines you aren’t receiving on this screen. Use the trash can on the line or select multiple lines and use the trash can above to remove the lines from the receipt you are working on. (This has no effect on the order or PO)

PO • P0320928 Print

Line	Item	Catalog No.	Quantity	Status
1	Canon 240XL/241XL Black and TriColor High Yield Ink Cartridge, 2/Pack with 4x6 photo paper (5206B005)	752960	1 PK	Received

Print Trash Cancel

When all lines are correct, click Complete in the top right.

Quantity Receipt • 598178 Save Updates Complete

Summary Comments Attachments History

PO • P0320928 Print Summary

You will get a message that your Receipt has been created.

Receipt Created

Summary	Next Steps
Receipt No Y00002154	Create Qty Receipt
Created for the PO No(s) P0320928	Create Cost Receipt

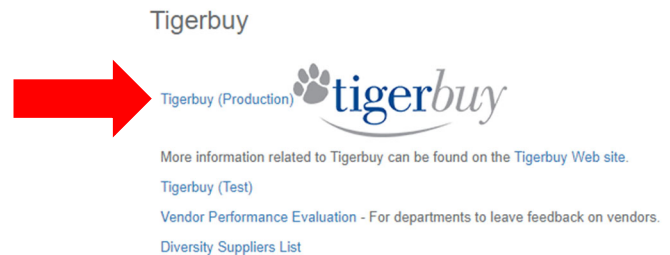
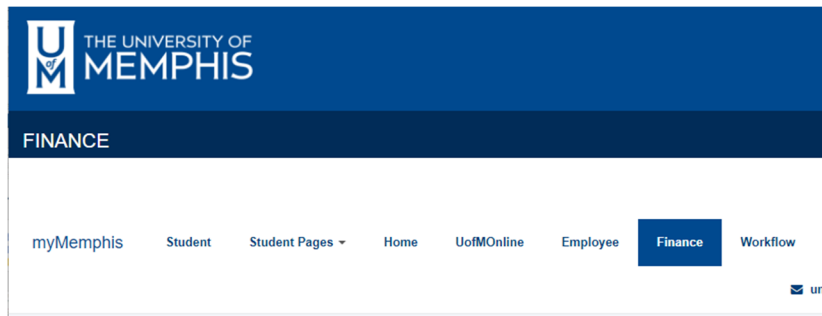
Now your PO lines show which lines are received and if there are any returns. Accounting will not pay any invoice until the credit is received.

## How to – Make a basic Staples return

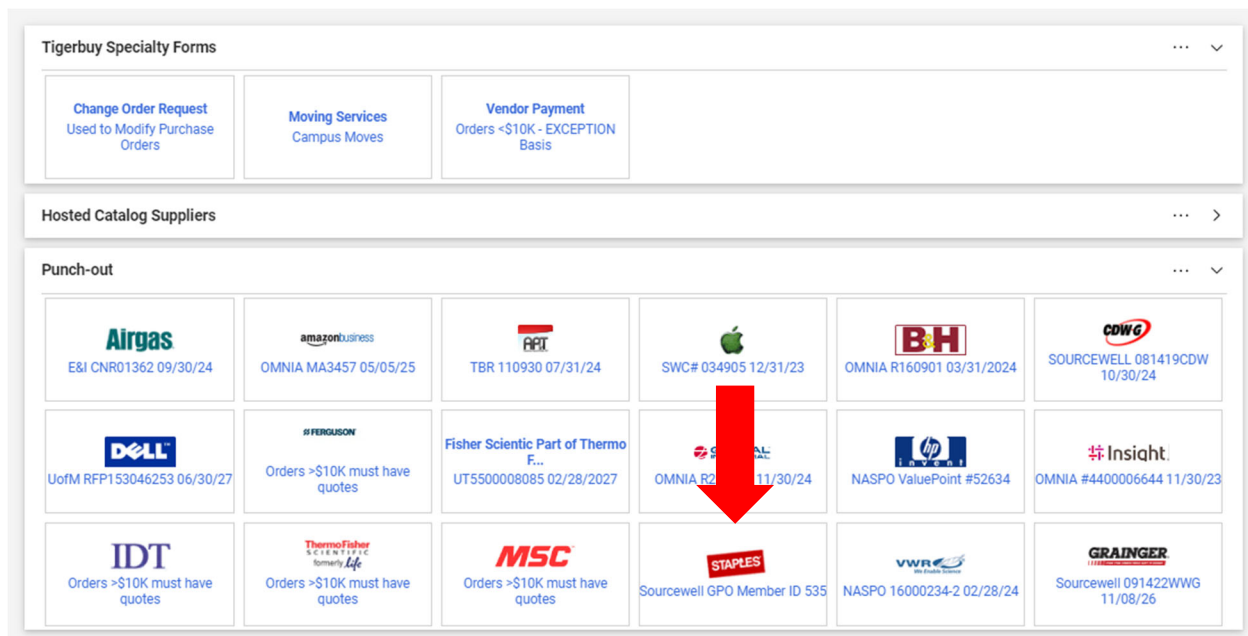
Returns are always a three-part process:

1. **Communicating** with the vendor to initiate the return process and get information on receiving credit.
2. **Internally processing** a return receipt in Tigerbuy, ensuring the invoice and credit are processed correctly.
3. **Physically returning** the item to the vendor if required.

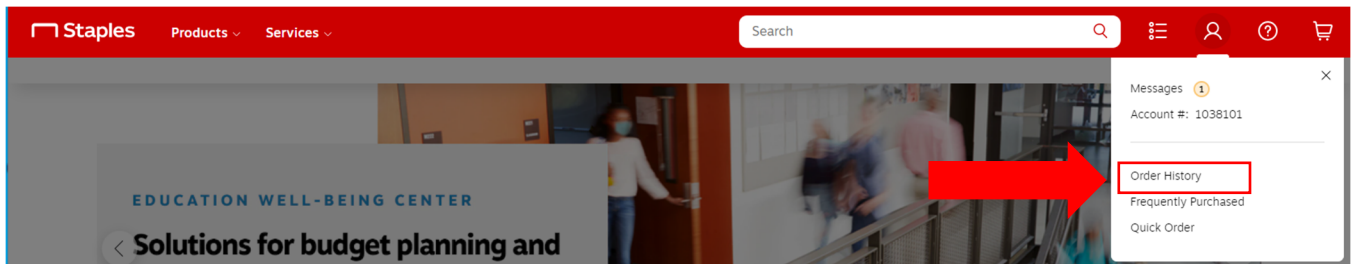
From MyMemphis, go to the **Finance** tab and choose Tigerbuy Production



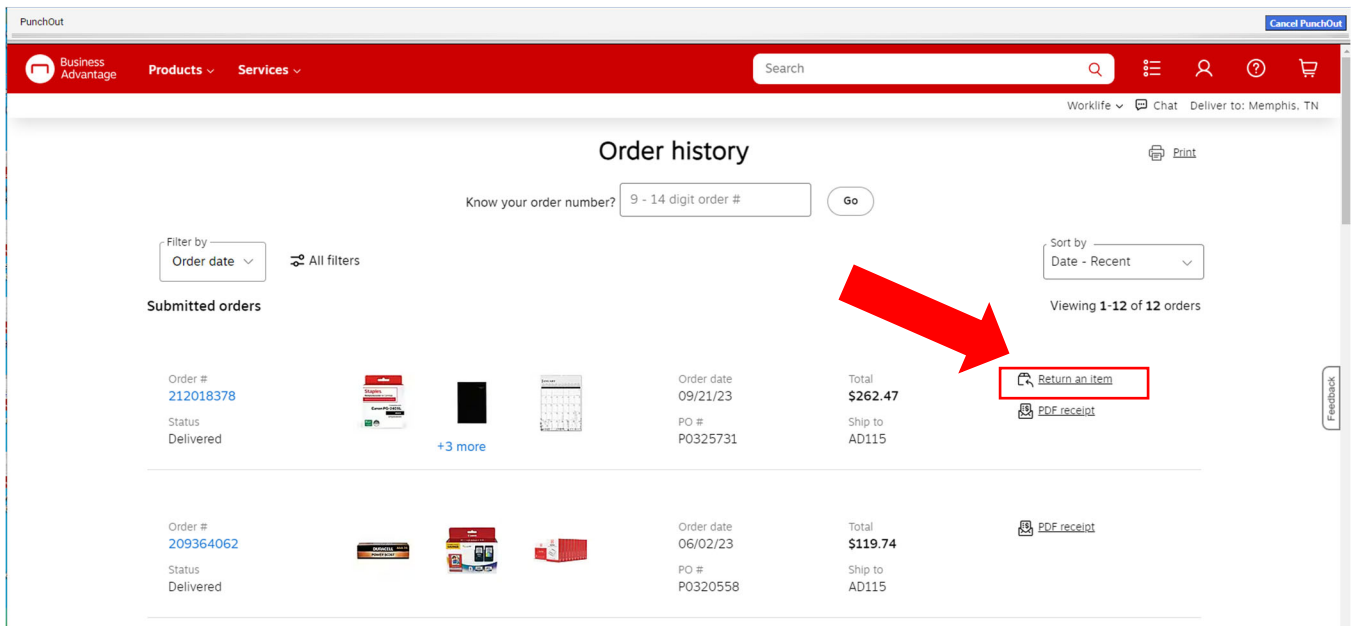
This will bring you to the shopping home page. Click on the Staples Punch Out Catalog button.



This brings up the Staples Catalog home page. Click on the person icon and choose **Order History**.



You will get a list of your previously shipped orders with pictures of the items you ordered. There are filters and sort options to help find your order. Once you find the order you need, click the **Return** link on the order line. Orders over 30-days are not return eligible. Contact customer service for issues with older orders.





The top portion of the screen contains your information. Make sure your contact information is correct, especially your email. You can edit this if needed using the **Edit** link.

Click the box and enter the number of each item you are returning and click **Select reason for return** on each line to indicate your reason for the return.

Enter the number of boxes you are packing the return in.

Click **Submit Return** when you are finished with the lines.

PunchOut

Business Advantage Products Services

Search

Order #: 212018378

Need help?

Submit return

Cancel PunchOut

Item return information

Contact information:  
JACKIE ROBINSON  
901-678-3775  
kreece@memphis.edu  
[Edit contact info](#)

Return pickup address:  
3720 ALUMNI DR  
115 ADMIN BLDG  
115 ADMINISTRATION BLDG  
MEMPHIS, TN 381523370

Number of boxes to be picked up:  
Please estimate how many boxes your items for return will be.

1

Staples Remanufactured Black High Yield Ink Cartridge Replacement for Canon PG-240 XL (TR5206B001/ST5206B001)  
Item #: 1004266 | Model #: ST5206B001 | CIN #: 1004266  
(0 of 1 returned)

Return qty\*  
0 of 1 item available for return

Select reason for return\*

2024 AT-A-GLANCE DayMinder Premiere 8" x 11.75" Monthly Planner, Hardsided Cover, Black (G470H-00-24)  
Item #: 24548779 | Model #: G470H0024 | CIN #: 24548779  
(0 of 2 returned)

Feedback

TOP

## Select a reason for return

Reason for return (required)

- ☐ Ordered wrong item
- ☐ Damaged
- ☐ Manufacturer's defect
- ☐ Received duplicate
- ☐ Not as advertised
- ☐ Product received too late
- ☐ Dissatisfied with item
- ☐ Changed my mind
- ☐ Wrong item received

[Cancel](#)

Continue

If at any time you'd like to Exit without saving anything, use the blue **Cancel Punchout** button in the top right corner.

You will get a screen showing your return is in progress and that you will be getting an email.

The screenshot shows the Staples website's return processing page. At the top is a red navigation bar with the Staples logo, 'Products' and 'Services' dropdowns, a search bar, and icons for a menu, user profile, help, and shopping cart. Below the navigation bar, the page title is 'Your return is being processed'. A sub-header reads: 'Your return is being processed and will be reflected on your order details shortly. You will receive an email detailing your return and refund information at kreece@memphis.edu'. Under 'Return information', details for return order #190377726 are listed, including the order date (March 17, 2021), customer name (KERRI REECE), phone number (901-678-3775), and the number of boxes to be picked up (1). A table titled 'Item(s) in your return' shows one item: 'Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36)' with item number 041302, model MN24P36, and CIN 041302. The item is marked as 'Damaged' with a quantity of 1. The refund amount for this item is \$21.40. At the bottom of the table, the 'Estimated refund total (pre-tax)' is \$21.40. Two buttons, 'Order details' and 'Continue shopping', are located at the bottom right of the page.

Staples Products Services Search

Worklife Chat


My Orders Order# 190377726

### Your return is being processed

Your return is being processed and will be reflected on your order details shortly. You will receive an email detailing your return and refund information at kreece@memphis.edu

**Return information**

Return order#: 190377726  
Order date: March 17, 2021  
Name: KERRI REECE  
Phone#: 901-678-3775  
Number of boxes to be picked up: 1

Item(s) in your return	
 Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36) Item : 041302   Model: MN24P36   CIN: 041302	<b>Damaged</b> QTY: 1 <b>\$21.40</b> <a href="#">Refund details</a>

Estimated refund total (pre-tax): \$21.40

[Order details](#) [Continue shopping](#)

You will then receive a Return Order Confirmation email. This will contain your return instructions and refund information. You may be directed to return the item or dispose of it.

Your return order #190377726 is Confirmed

The screenshot shows an email from Staples with the subject 'Return Order Confirmation'. The email header includes the Staples logo, the email address 'orders@staplesadvantage.com', and the recipient 'Keri Reece (kreece)'. The email body is divided into two main sections. The left section, titled 'Return Order Confirmation', contains a greeting 'Dear Null Null', a statement 'We have received your return request.', and a section titled 'Return instructions' with three numbered points: 1. KEEP the products and use at your discretion or, 2. DONATE the products to a worthy cause or, 3. DISCARD the products, if recyclable please dispose of correctly. It also states 'You will receive another email when we have issued your credit.' and 'Thank you for choosing Staples, Staples Customer Service'. The right section, titled 'Items being returned', shows a table with one item: 'Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36)' with item number 041302, model MN24P36, and a quantity of 1. The unit price is \$21.40 each, and the total refund is \$21.40. A red checkmark icon and the text 'On contract' are next to the item. The right side of the email contains a summary of the return order, including the return order date (March 26, 2021), order number (190377726), and customer ID (1038101). It also includes a table for 'PAYMENT INFORMATION' and 'REFUND INFORMATION'. The payment information shows a total of \$21.40. The refund information shows a merchandise refund of \$21.40, shipping of \$0.00, and a total refund of \$21.40.

Staples <orders@staplesadvantage.com>  
To: Keri Reece (kreece)

Reply Reply All Forward

Fri 3/26/2021 9:14

### Return Order Confirmation

Dear Null Null,  
We have received your return request.

**Return instructions**


You do not need to return your items to us. PLEASE FEEL FREE TO:

1. KEEP the products and use at your discretion or
2. DONATE the products to a worthy cause or
3. DISCARD the products, if recyclable please dispose of correctly.

You will receive another email when we have issued your credit.

Thank you for choosing Staples,  
Staples Customer Service

**Items being returned**

Item	Quantity	Unit Price	Total
 Duracell Coppertop Alkaline AAA Battery, 36/Pack (MN24P36) Item: 041302   Model: MN24P36	1	\$21.40 each	\$21.40

On contract

**ORDER INFORMATION**

Return Order Date: March 26, 2021  
Order#: 190377726  
Customer ID: 1038101

PAYMENT INFORMATION		REFUND INFORMATION	
A/R:	\$21.4	Merchandise Refund:	\$21.40
Credit will be applied to your account		Shipping:	FREE
		Tax Refund:	\$0.00
		<b>Total Refund</b>	<b>\$21.40</b>

## Now you need to Process the return Receipt in Tigerbuy

Click on **Orders / My Orders / My Purchase Orders** on the left menu.

The screenshot shows the Tigerbuy system's left-hand navigation menu. The menu is divided into two sections: 'Simple' and 'Advanced'. The 'Simple' section includes links for 'Orders', 'Search', 'My Orders', 'Approvals', and 'My Requisitions'. The 'Advanced' section includes links for 'My Purchase Orders', 'My Invoices', 'My Receipts', and 'My Procurement Requests'. A red arrow points to the 'My Purchase Orders' link in the 'Advanced' section. Below the navigation menu, there is a section titled 'VENDOR INFORMATION' with a list of links: 'University of Memphis: Procurement Guideline', 'To access Tigerbuy training documents and generic video snippets, view this information at: Tigerbuy Training Materials', and 'Vendor Registration Form that can be filled out and emailed to Procurement with require'.

Simple Advanced

Orders

Search

My Orders

Approvals

My Requisitions

My Purchase Orders

My Invoices

My Receipts

My Procurement Requests

University of Memphis: [Procurement Guideline](#)

To access Tigerbuy training documents and generic video snippets, view this information at: [Tigerbuy Training Materials](#)

**VENDOR INFORMATION**

- A Vendor must be registered in Tigerbuy before you can begin a purchase requisition.
- Vendor Registration site: [TIGERBUY VENDOR REGISTRATION](#)
- Vendor Registration Form that can be filled out and emailed to Procurement with require

This brings up a list of your Purchase Orders in progress. The left menu contains filters that can help you narrow your search. Click on the PO number you want to return receipt.

Orders > Search > Purchase Orders

Search Purchase Orders

Quick Filters My Searches

Created Date: Last 90 days Quick search

20 Per Page

Supplier	PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
	P0280490	Staples Contract and Commercial Inc	1/14/2021 2:31:28 PM	Completed	3153481	Kerri Reece	Sent To Supplier	No Matches	342.62 USD
	P0280489	Graybar Electric Co Inc	1/14/2021 2:30:11 PM	Completed	3153454	Kerri Reece	Sent To Supplier	No Matches	2,498.11 USD
	3248303	W W Grainger Inc	1/14/2021 2:29:12 PM	Pending	3153434	Kerri Reece	No Shipments	No Matches	96.13 USD
	P0280488	Staples Contract and Commercial Inc	1/14/2021 2:26:27 PM	Completed	3137281	Kerri Reece	Sent To Supplier	No Matches	149.43 USD
	3248300	Staples Contract and Commercial Inc	1/14/2021 2:23:42 PM	Pending	3132986	Kerri Reece	No Shipments	No Matches	34.09 USD
	P0280481	Staples Contract and Commercial Inc	12/3/2020 4:10:52 PM	Completed	3129961	Kerri Reece	Sent To Supplier	No Matches	70.43 USD

20 Per Page

Your PO opens. Click on the ellipses on the right and choose **Create Receipt**.

Purchase Order • Staples Contract and Commer... • P0310460 Revision 0

Status Summary Revisions 1 Confirmations Shipments Receipts 3 Invoices Comments Attachments History

**General Information**

PO/Reference No. **P0310460**

Revision No. 0

Supplier Name **Staples Contract and Commercial Inc**

Purchase Order Date 10/25/2022

Total 229.22

**Document Status**

A/P status Open

Workflow **Completed**  
(10/27/2022 9:41 AM)

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: [view](#)

cXML (Electronic Integration) no value

0.00

6 of 9 Results

- Add Comment
- Add Notes to History
- Cancel PO
- Finalize Revision
- Create Receipt**
- Create Credit Memo
- Create Invoice
- Print Fax Version
- Send Test PO


This will open the **Create Receipt** screen. Here you will choose which lines to work with.

The screen contains a list of your PO line items. It defaults to all lines checked.

- To return all lines, leave the checks and choose your receipt type at the bottom.
- To return some lines, uncheck any lines you don't want to return or use the top check box to uncheck all lines and only check the ones you need. Best practice is NOT to include 0 quantity lines on your return. Then click **Create quantity receipt**.

**P0320928: Create Receipt**✕

	Item Type	Net Qty Received	Net Cost Received	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>
1	None	--	--	Canon 240XL/241XL Black and TriColor High Yield Ink Cartridge, 2/Pack with 4x6 photo paper (5206B005)	752960	PK	56.20	1 PK	56.20	<input checked="" type="checkbox"/>
2	None	2	--	Pilot G2 Retractable Gel Pens, Fine Point, Purple Ink, Dozen (31029)	462337	DZ	11.91	2 DZ	23.82	<input checked="" type="checkbox"/>
3	None	3	--	Post-it Super Sticky Notes, 3" x 3", Supernova Neons Collection, 70 Sheets/Pad, 24 Pads/Pack (654-24SSMIA-CP)	2095545	PK	24.48	3 PK	73.44	<input checked="" type="checkbox"/>
4	None	2	--	TRU RED 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500 Sheets/Ream, 8 Reams/Carton (TR59702)	24472187	CT	36.71	2 CT	73.42	<input checked="" type="checkbox"/>



When you click **Create quantity receipt**, your return receipt will come up with only the lines that were checked.

You don't need to enter anything on the top.

Receipt Name	2023-11-06 kreece 04	Carrier	Other
Receipt No	To Be Assigned	Tracking No.	
Receipt Date	11/6/2023	Flexible Text Field	
Packing Slip No.		Flexible Drop Down	
Supplier Name	Staples Contract And Commercial Inc	Attachments	Add
Received by	Kerri Reece	Notes	
Receipt Address			

Contact Name Their name  
Phone +1 901-678-2265  
Email kreece@memphis.edu  
115 Admin Bldg  
3720 Alumni Dr  
Memphis, TN 38152-3370  
United States

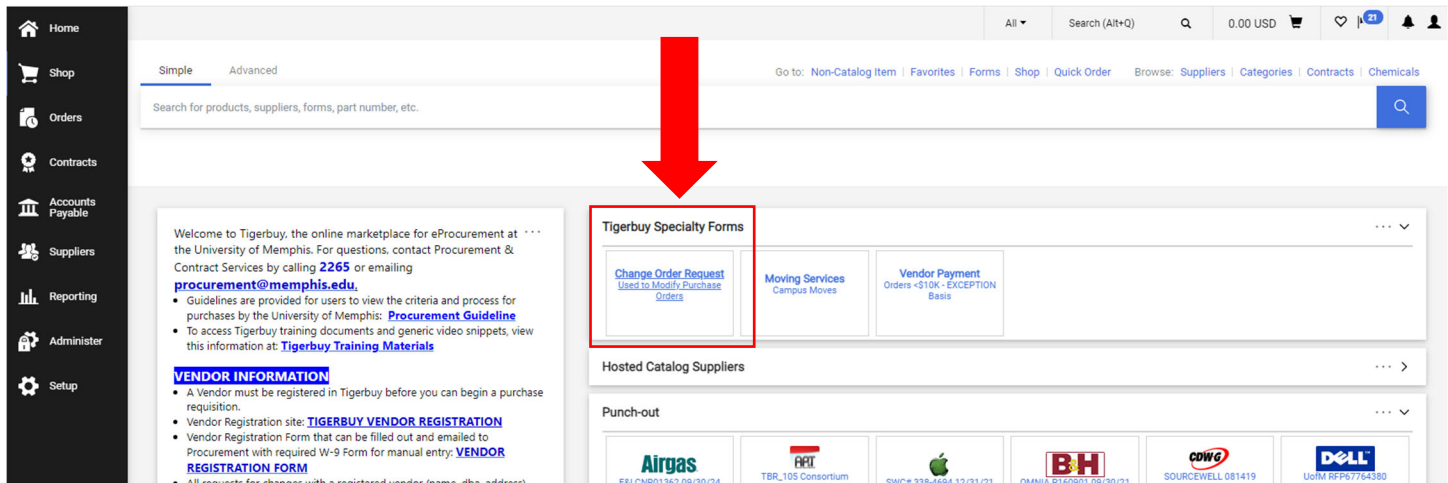
1000 characters remaining

# How to - Create a Change Order Request

## Overall process:

1. Requester submits the Requisition containing the Change Order Request form.
2. System checks budget for available funding.
3. Organization Approver approves the requisition.
4. Procurement reviews Change Order Request form for purchase order number and change requested.
5. Procurement opens purchase order in both Tigerbuy and Banner to verify eligibility for processing.
6. Procurement applies change(s) in both Tigerbuy and Banner as needed.
7. Procurement Approves the Change Order requisition.
8. Process is complete.

The **Change Order Request** form is located under Tigerbuy Specialty Forms on the Tigerbuy Home / Shopping Page.



## Things we can't change after the PO is issued:

### **FOAP (accounting code) changes**

Accounting codes cannot be revised once the purchase order is issued.

### **Options for FOAP (accounting codes) changes:**

- Do a transfer voucher through accounting after the Tigerbuy purchase has been received and paid to correct the budget issue.
- The PO with incorrect information can be cancelled with a change order and a new PO issued with correct information through a new requisition. If this is done, it is highly recommended you communicate with the Vendor that the PO cancel / reissue is coming.

### **Purchase order with incorrect vendor**

A Vendor cannot be revised on a Purchase Order that has been issued. A PO is a legal UOM document sent to the Vendor. Incorrect Vendor PO must be cancelled with a change order and a new PO issued to correct Vendor through a new requisition.

### **Punchout line items**

Punchout / Catalog orders are transmitted electronically, so we can't change or cancel items or orders. Any corrections would need to happen through returns. We can close out punch out lines that are rejected or backordered by the vendor once the order is complete.

Form • Change Order Request

Supplier Info

Existing Supplier

Enter Supplier \*

Select Supplier

Type in your Vendor or use the Search feature.

General Info

Non-Configurable Fields

General Info Instructions

Use this form if you want to modify an existing Purchase Order (i.e increase/decrease funds, cancel a PO, renew/extend an existing agreement, etc.) Attach supporting documentation, if necessary. Reference the Requisition Number on all documents related/attached to this Change Order Request. All attachments and notes can be added in cart review.

Form Type \*

Change Order Request

Catalog No. \*

N/A

Product Description \*

Tell us what you need us to do.

Please close balance on P0xxxx. Invoicing is complete.

Please increase Line 1 to \$150.00

Please cancel Line 3. Lead time too long.

Quantity \*

1

Packaging

EA - Each

Estimated Price \*

0.00

The system will check the budget for any amounts put here. Use \$0 if canceling or closing. If increasing, only put the amount of the increase.

Configurable Fields

Manufacturer Name

Manufacturer Part No

Please enter the P and zero before the six-digit number. It helps in the processing. P0xxxxxx

Purchase Order # \*

Total 0.00 USD

Use the Catalog #, Quantity, Packaging, Manufacturer Name, and Manufacturer Part # fields if needed to convey information to the vendor.

Only one Purchase Order number is allowed in a Change Order Request Requisition. Requisitions containing a Change Order Request form cannot contain other forms or lines of purchase.

When you are ready click Add & Go to Cart to send this item to your cart and go work with it. If you need to add multiple lines, use the pulldown to see other options, such as Add to Cart and then use Add & Go to Cart on your last line. It will be possible to add more lines from the cart as well.

Review your cart. You have the ability to take action on the line items in your cart. Click the ellipses (...) on the line to see your options. This might be needed to remove a duplicate or if you've accidentally combined a change order with a shopping cart. Click the selection squares on the far right to act on several lines at once.

If you need to change the Item description, click on the text and the form will open back up for editing. Make your change and then save it and close to come back to the cart. (the text cuts off in the cart to save space)

Please name your cart. This helps us sort change orders when processing and speeds up the process. Generally, "Close / Cancel / Increase / Decrease" and the PO number are what we need. This also provides clarity for your approver when it comes to them in an email.

When everything is ready to go, click the blue **Proceed to Checkout** button. That will move to the Requisition stage.

Shopping Cart • Shopping Cart

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name: Close out P0xxxxx

Description:

Priority: Normal

Sole Source & Contract Order:

Details

For: Kerri Reece

Total (0.00 USD)

1 Item

Test Vendor • 1 Item • 0.00 USD

SUPPLIER DETAILS PO Purchase/Change Orders 1 : 5050 Poplar Ave, Memphis, Tennessee 38157-0101 United States

Contract: no value PO Number: To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Please tell us what to do. Don't assume we know whi	N/A	EA	0.00	Qty: 1 EA	0.00

ITEM DETAILS

Contract:

Remove

Add to Favorites

Move to Another Cart

Add to Draft Cart or Pending PR/PO

Add to PO Revision

Proceed To Checkout

Attachments can be added to the Requisition if needed. Procurement will add the attachments to the purchase order if needed. If your change order request is ready, click the **Place Order** button to submit it.

Requisition • 3690061

Summary Taxes/S&H PO Preview Comments Attachments History

Accounting Codes

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	74500 Supplies	4650 Gen Admin and Logistical Services	no value

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: Add

Export to Sourcing Manager: no value

Sole Source & Contract Order: no value

Buyer Name: no value

External Notes and Attachments

Note to all Suppliers: no value

Attachments for all suppliers: Add

PO Clauses: Add

Draft

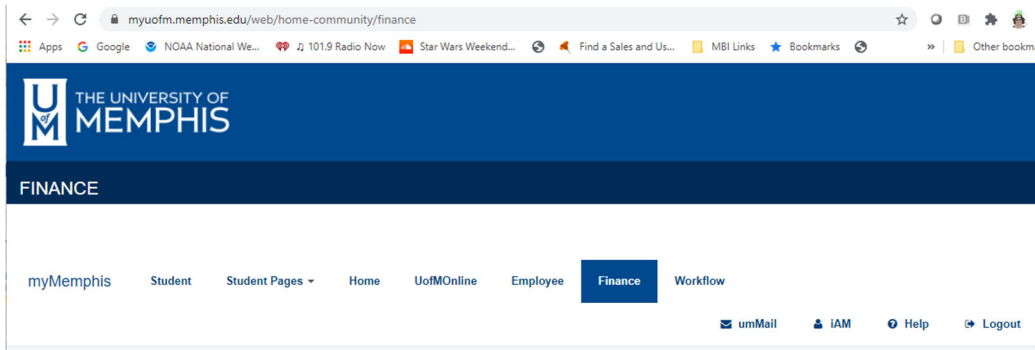
Total (0.00 USD)

What's next for my order?

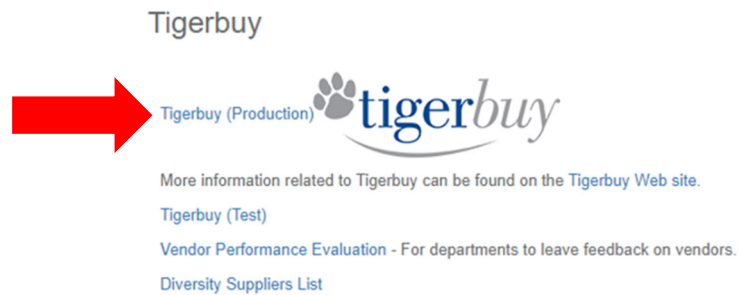
Place Order

## How to - Tigerbuy Reporting

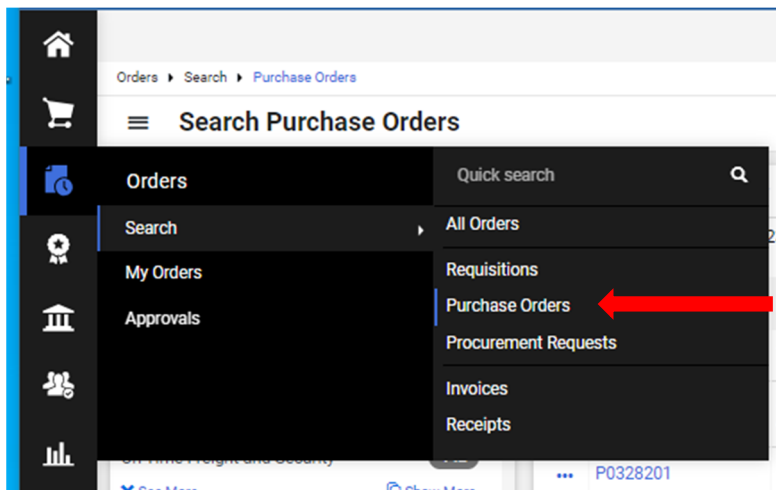
Log into My Memphis & go to the **Finance** tab:



Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**

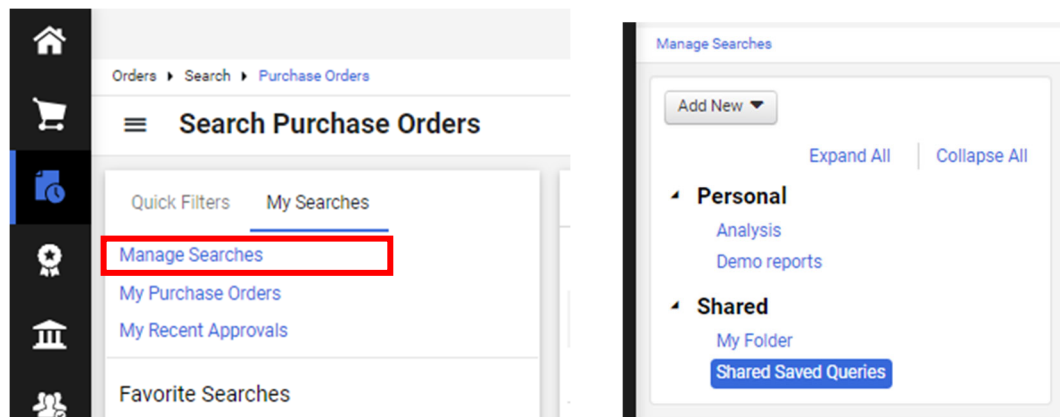


Tigerbuy opens on the Home screen. Click on **Orders Search / Purchase Orders** on the left menu.

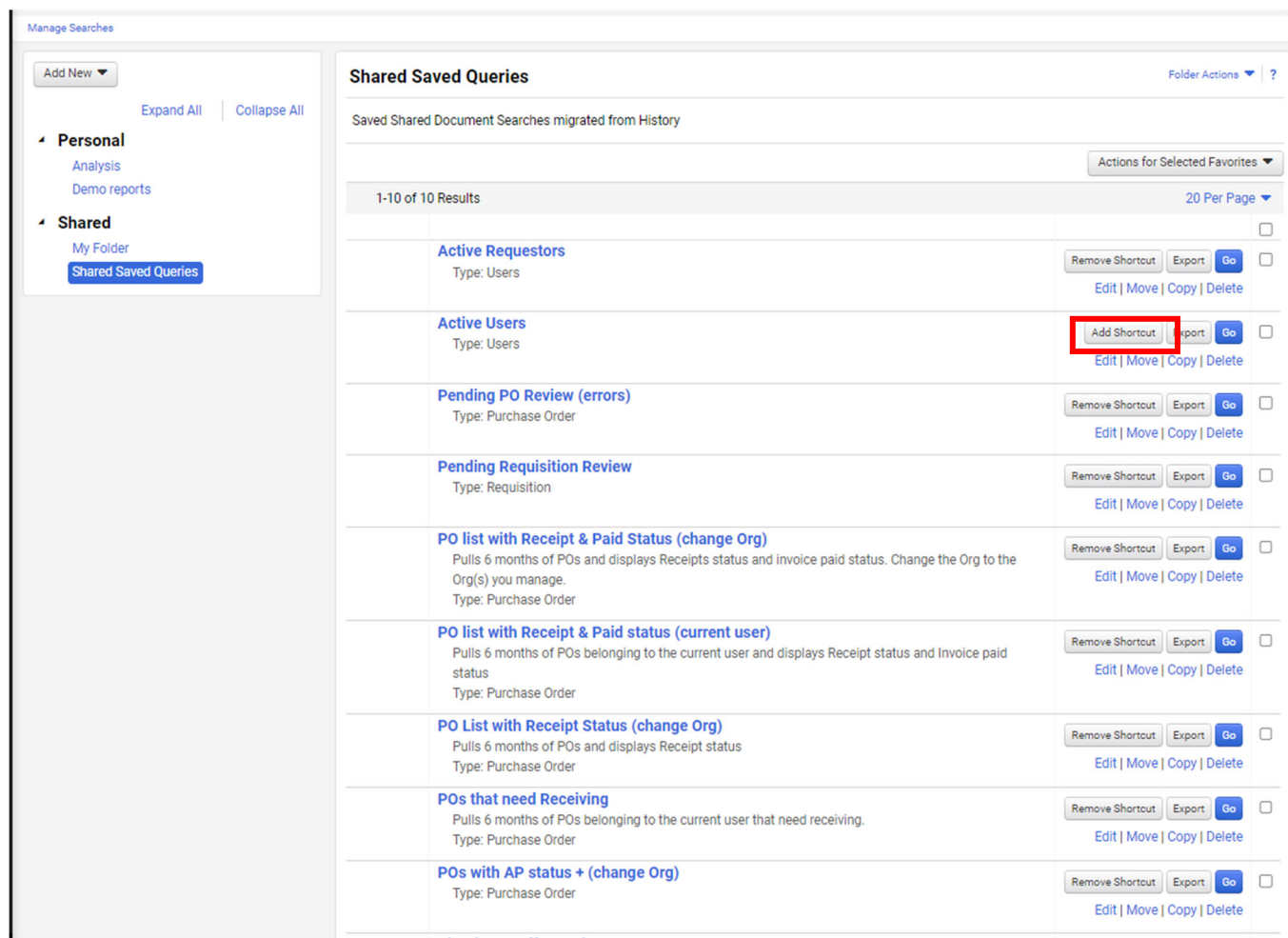




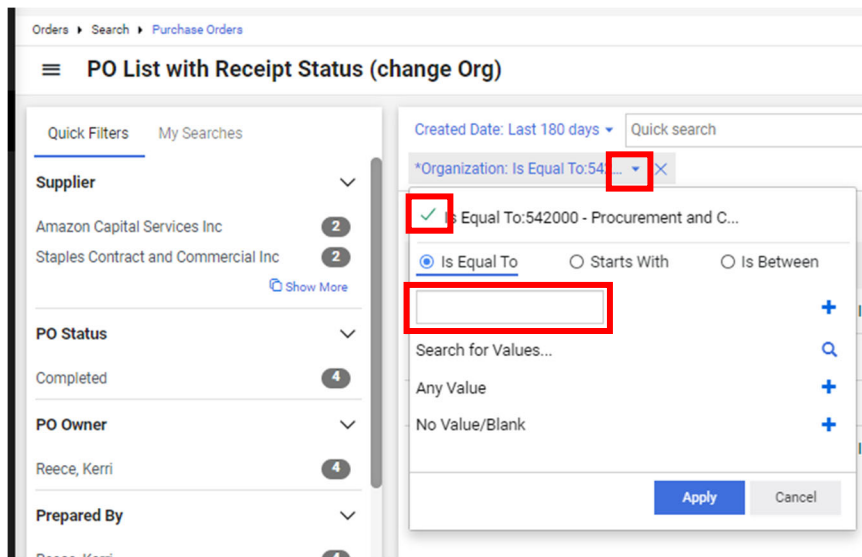
Click on **My Searches** on the left side of the screen. Click on **Manage Searches**. Click on **Shared Saved Queries**.



You should see several shared reports that you can start with. Some need you to choose your organization and some default to the current user. The information in the parentheses tells you which one the report is. Click the Add Shortcut button on any reports you want to add to your saved folder.

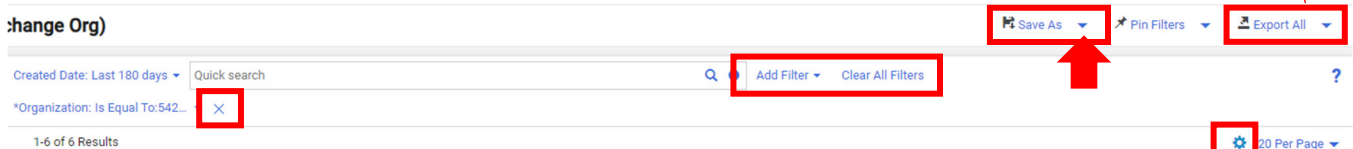
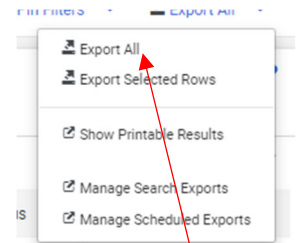


Once you have the report shortcuts pulled into your searches, you can run them by clicking on them. To make changes to the filters in place, use the pulldown arrow and make changes. To change the Org, uncheck the one at the top, type in the Org you need, and click **Apply**.

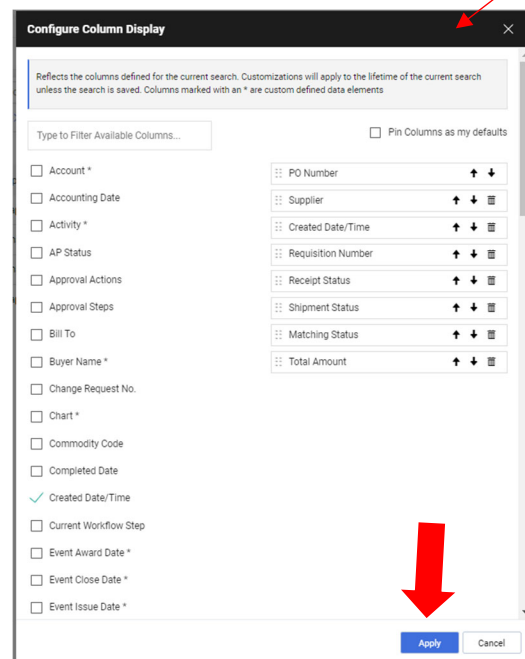


You can then change the filters and columns as needed using the pulldown menus.

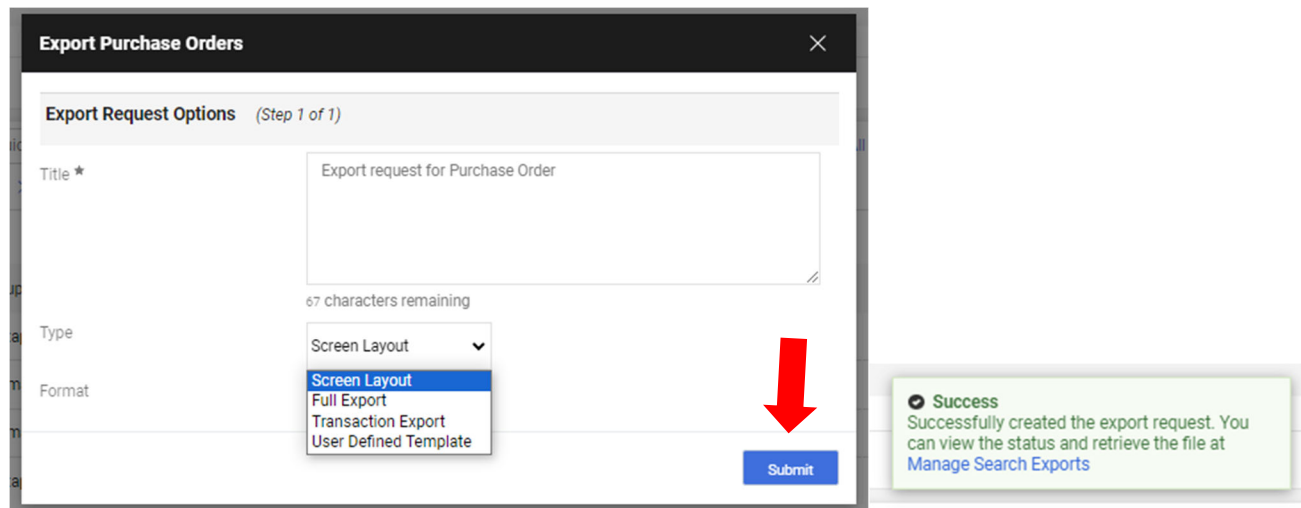
- Add filters using the **Add Filter** pulldown
- Remove individual filters by clicking the **X**
- Add and rearrange columns by clicking on the gear
- Use **Save As** to save a new search / report to your Personal folder
- Use **Export All** to export to Excel



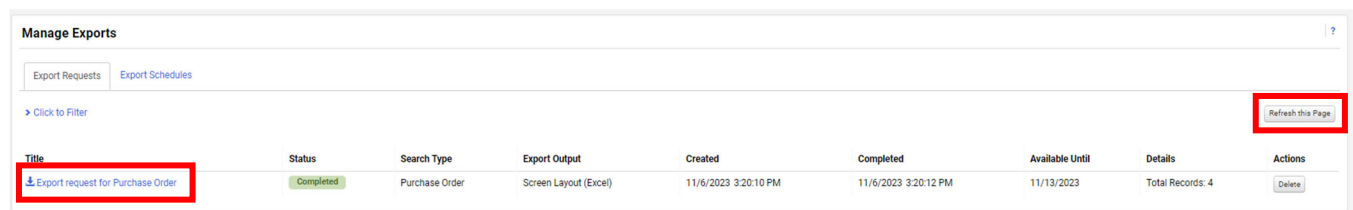
The check boxes allow you to add or remove columns from the list on the left. The selected columns are listed on the right. They can be rearranged by grabbing them and dragging and dropping them or using the arrows. Click **Apply** to save your changes.



When exporting, you will need to name your report in the Title space, then choose the type. **Screen Layout** gives you the PO header information that you see on the screen. **Transaction Export** will give you all line items on the PO. Click **Submit**.

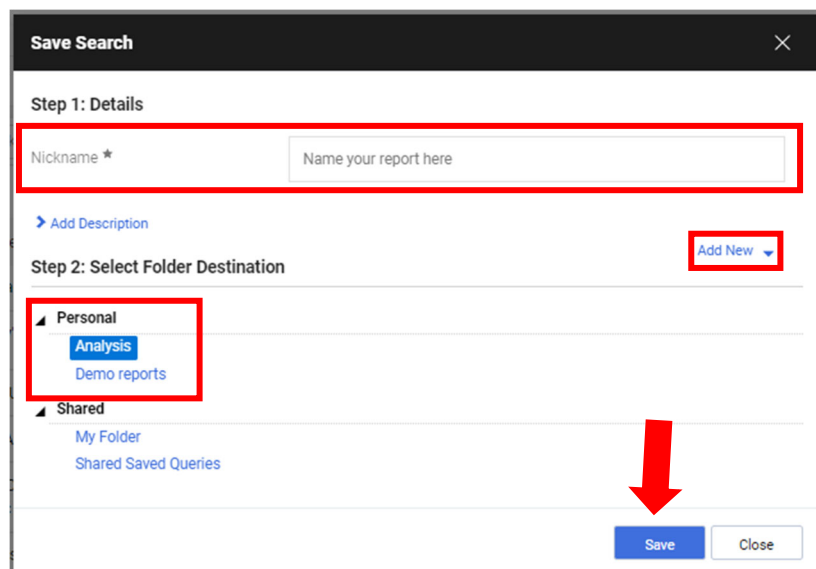


You will get a Success message with a link to your report. When it is completed, you will see the title of your report as a clickable download link. You may have to refresh the screen a few times depending on the size of your report.



Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
<a href="#">Export request for Purchase Order</a>	Completed	Purchase Order	Screen Layout (Excel)	11/6/2023 3:20:10 PM	11/6/2023 3:20:12 PM	11/13/2023	Total Records: 4	<a href="#">Download</a> <a href="#">Delete</a>

You can run reports for Purchase Orders, Requisitions, Invoices, and Receipts. You can create your own using any search and adding filters to the resulting list. You can save your created reports using the **Save As** button. Name your report and save it in your Personal folder. You can add new subfolders by using the **Add New** pulldown. Click **Save**.



Step 1: Details

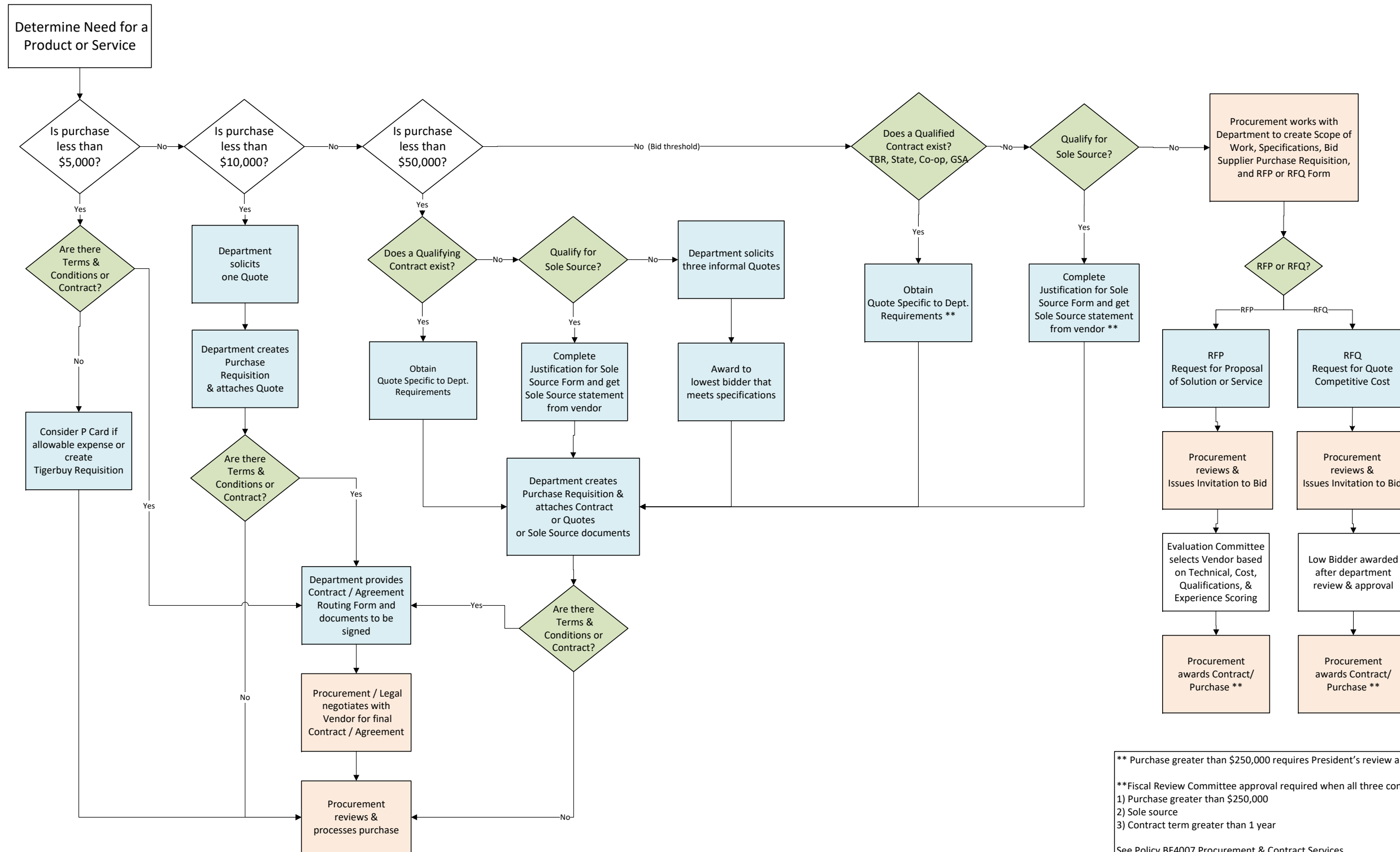
Nickname \*

Step 2: Select Folder Destination

- Personal
  - Analysis
  - Demo reports
- Shared
  - My Folder
  - Shared Saved Queries

[Save](#) [Close](#)

## Purchase decision tree



\*\* Purchase greater than \$250,000 requires President's review and approval

\*\*Fiscal Review Committee approval required when all three conditions are met:

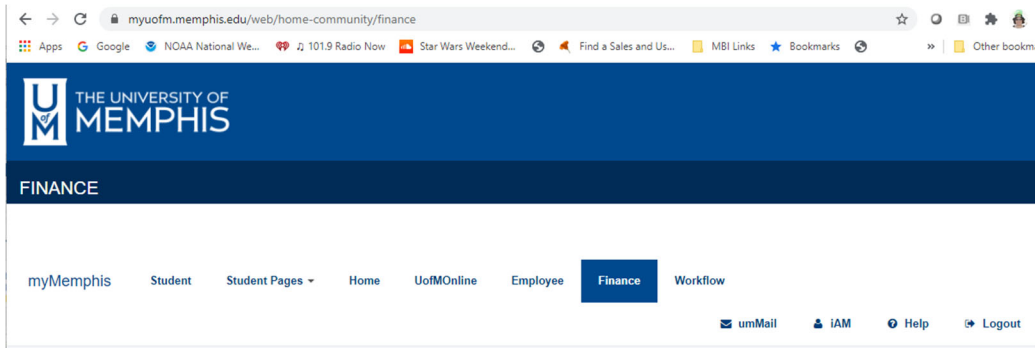
- 1) Purchase greater than \$250,000
- 2) Sole source
- 3) Contract term greater than 1 year

See Policy BF4007 Procurement & Contract Services.

## How to - Tigerbuy Profile Setup

There are a few items in your Profile that must be set up, and a few others you may want to set up.

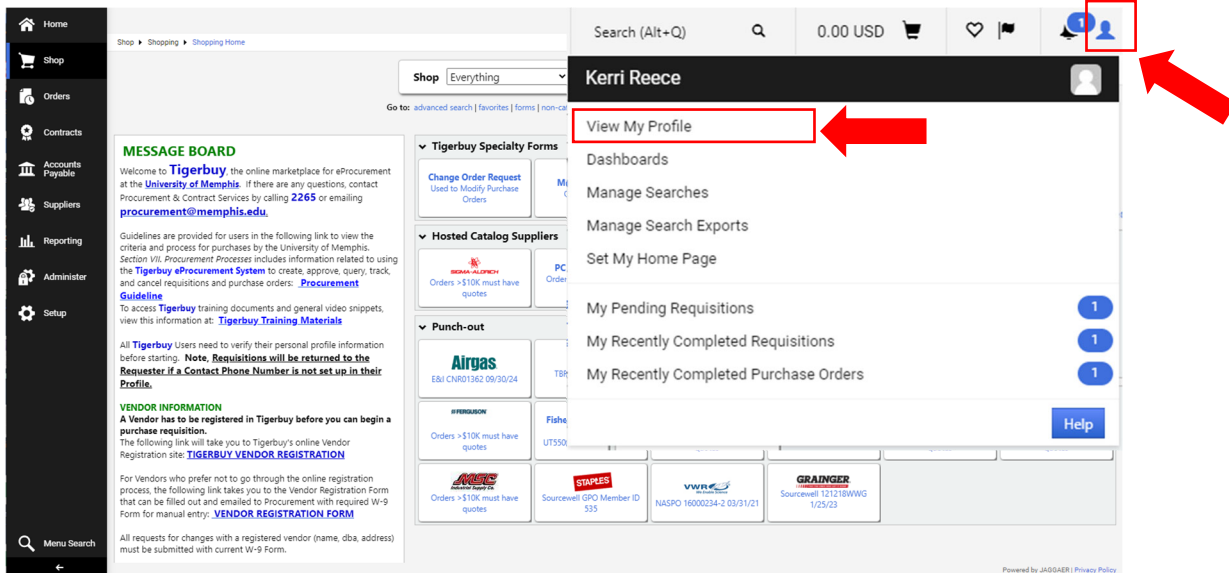
Log into My Memphis & go to the **Finance** tab:



Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**



Tigerbuy opens on the Home screen. Click on the Person icon and choose **View My Profile**



Screen opens on User Profile and Preferences

## User's Name, Phone Number, Email, etc. (Required):

My Profile ▶ User's Name, Phone Number, Email, etc.

**Kerri Reece**

User Name kreece

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Early Access Participation

Guided Tour Instructions

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

User's Name, Phone Number, Email, etc.

First Name

Kerri

Last Name

Reece

Phone Number

+1 901-678-3775 ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address \*

kreece@memphis.edu

Authentication Method

NetId

User Name \*

kreece

★ Required

Save Changes

You must enter a phone number. The number is entered with 10 digits, no dashes (9016782265). **Save Changes** and the number populates with +1 and dashes added (+1 901-678-2265).

*Requisitions will not process in Tigerbuy if a phone number is not set up in the Requester's profile.*

## Language, time zone and Display (Required):

My Profile ▶ Language, Time Zone and Display Settings

**Kerri Reece**

User Name kreece

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Early Access Participation

Guided Tour Instructions

Update Security Settings

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

Administrative Tasks

Language, Time Zone and Display Settings

Select a Language

English

Country

United States

Currency

USD

Time Zone

CDT/CST - Central Standard Tim

Color Theme

Preferred email format

HTML

Access Training Content Configuration

☐ Yes ☒ No

Home Page

☒ Default ☐ Override Shopping Home

Accessibility

Enable Accessibility Mode

☐ Yes ☒ No

Help on mouse over

Enable Limited Animation

☐ Yes ☒ No

Save Changes

Complete first 4 selections for language, country, currency, and time zone.

## Default User Settings / Default Addresses (Required)

Shipping Addresses are official UOM buildings.

**Ship To Tab - Click Select Addresses for Profile.**

My Profile ▸ Default Addresses

**Kerri Reece**  
User Name kreece

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- Custom Field and Accounting Code Defaults >
- Default Addresses**
- Cart Assignees
- Payment Options
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

**Default Addresses**

**Ship To** Bill To ?

Select an address to edit

**Shipping Addresses**

AD147

[Select Addresses for Profile](#)

Under **Address Search** enter the building abbreviation (campus maps) you are searching for and click **Search**. Find your room number and click in the circle to select line.

**Default Addresses**

**Ship To** Bill To ?

Select an address to edit

[Select Addresses for Profile](#)

**Shipping Addresses**

AD147

**Address Search**

Nickname / Address AD

Text

Results Per Page 10

[Search](#)

Addresses Found: 56 Page 1 of 6

Name	Address
<input type="radio"/> AD100	Contact Name Information Technology Department Phone +1 901-678-3775 Email kreece@memphis.edu 100 Administration Bldg 3720 Alumni Dr Memphis, TN 38152-3370 United States
<input type="radio"/> AD105	Contact Name Information Technology Department Phone +1 901-678-3775 Email kreece@memphis.edu

The shipping address (as it will appear when you create requisitions) will populate this area. Select **Default** box and **Save**. Your address will move to your profile box on left. Addresses are 2 lines: Line 1-Building and Room Number; Line 2-Street Address. If you do not find your room number, contact Procurement.

### Default Addresses

Ship To Bill To

Select an address to edit
Select Addresses for Profile
Delete Address

#### Shipping Addresses

AD147

#### Edit Selected Address

Nickname: AD147

Default: ☒

Current Default Address: AD147

#### ADDRESS

Contact Name \*: Procurement Services

Phone: +1 901-678-3775

Email \*: kreece@memphis.edu

Address Line 1: 147 Administration Bldg


Address Line 2: 3720 Alumni Dr

City: Memphis

State: TN

Zip Code: 38152-3370

Country: United States

 Save

**Bill To Tab – Click Select Addresses for Profile.**

Click the arrow in the box beside **Select Address Template**. Select **Memphis Billto**. The Accounts Payable address will populate this area. **Save** it to move to profile box.

### Default Addresses

Ship To Bill To

No addresses defined in profile.

Select an address to edit
Select Addresses for Profile
Delete Address

#### Billing Addresses

No addresses defined in profile.

#### Edit Selected Address

Nickname: Memphis Billto

Default: ☒

Current Default Address: ---

#### ADDRESS

Contact Line 1: University of Memphis

Contact Line 2: Attn: Accounts Payable

Address Line 1: 275 Administration Bldg

City: Memphis

State: TN

Zip Code: 38152-3370

Country: United States

Save

### Default Addresses

Ship To Bill To

Select an address to edit
Select Addresses for Profile
Delete Address

#### Billing Addresses

Memphis Billto

#### Edit Selected Address

Nickname: Memphis Billto

Default: ☒

Current Default Address: Memphis Billto

#### ADDRESS

Contact Line 1: University of Memphis

Contact Line 2: Attn: Accounts Payable


Address Line 1: 275 Administration Bldg

City: Memphis

State: TN

Zip Code: 38152-3370

Country: United States

 Save



## Default User Settings / Custom Field and Accounting Code Defaults (Required):

By setting up defaults, your requisition documents will populate with the required accounting information needed for a purchase. Please note Index numbers cannot be used in Tigerbuy. The Accounting Codes or FOAP for an Index number must be entered in the Tigerbuy requisition.

Select **"Codes"** tab to set up **Profile Values** information and defaults.

The Codes screen will show accounting codes (values) in the **Default Value** column after User sets up. You can set up values for Chart, and FOAP (Fund, Organization, Activity, Program) and Account.

My Profile > Custom Field and Accounting Code Defaults

**Kerri Reece**  
User Name kreece

User Profile and Preferences >  
Update Security Settings >  
Default User Settings <  
**Custom Field and Accounting Code Defaults**  
Default Addresses  
Cart Assignees  
Payment Options  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >  
Administrative Tasks >

**Custom Field and Accounting Code Defaults** ?

Header (int.) **Codes** Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Account	74500	Supplies	Edit
Activity	No Default Value		Edit
Chart	U	University of Memphis	Edit
Fund	110001	Undesignated E and G	Edit
Organization	542000	Procurement and Contract Services	Edit
Program	4650	Gen Admin and Logistical Services	Edit

Begin each line by clicking **"Edit"** to open the Value Creation screen. In this screen your profile code values set up will be shown on the left side. Selection is on the right side. **Chart** is set up first and only has one selection for the University.

**Custom Field and Accounting Code Defaults**

Header (int.) **Codes** Code Favorites Internal Information

Custom Field Name	Default Value	Description	Edit Values
Chart	U	University of Memphis	Edit

Edit Values

Create New Value

Value	Description
U	University of Memphis

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

**Edit Existing Value** ?

Value U  
Description University of Memphis  
Default ☒  
Status active

Save Remove

Close

Click **Edit** then **Create New Value**.

Select the **U Value** by checking the box shown. Click **Add Values** and your selection moves to profile box. Click on the **U Value**, information populates, click **Default** box and **Save**. This Chart value is set up and defaulted.

Click **Close** to go back to the Codes screen.

**Fund** is the next selection.

#### Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites Internal Information ?			
Custom Field Name	Default Value	Description	Edit Values
Account	74500	Supplies	Edit
Activity	No Default Value		Edit
Chart	U	University of Memphis	Edit
Fund	110001	Undesignated E and G	Edit
Organization	542000	Procurement Services	Edit
Program	4650	Gen Admin and Logistical Services	Edit

Click **Edit** then **Create New Value**.

Type the Fund number in the Value field or type the name in the Description field and click Search. Code information populates box.

#### Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites Internal Information ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	110001	Undesignated E and G	Edit

Edit Values Close

Create New Value

Value	Description
110001	Undesignated E and G

Search For Value ?

Field Name Fund

Value

Description Procurement

Results Per Page 5

Search

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Click **Edit** then **Create New Value**.

Type the Fund number in the Value field or type the name in the Description field and click Search. Code information populates box.

#### Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites Internal Information ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	110001	Undesignated E and G	Edit

Edit Values Close

Create New Value

Value	Description
110001	Undesignated E and G

Results Per Page 5 Values Found 1 Page 1 of 1 ?

Select	Value	Description
<input type="checkbox"/>	127545	Procurement and Contract Services

Add Values Back to Search

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Code information populates box.

Click box to select code line and click **Add Values** for your selection to move to profile box.

#### Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites Internal Information ?			
Custom Field Name	Default Value	Description	Edit Values
Fund	110001	Undesignated E and G	Edit

Edit Values Close

Create New Value

Value	Description
110001	Undesignated E and G

Edit Existing Value ?

Value 110001

Description Undesignated E and G

Default ☒

Status active

Save Remove

\* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Click on the selected fund value to edit it, select **Default** and **Save**.

Close screen to go back to the Codes screen to begin next selection.

All other codes are set up by this same process by line Using Edit, Create New Value, Search, Select, Add Value, Edit, select Default, Save, then Close.

Once you have your default set up, you can also add commonly used codes to save time searching for them.

You can also add Accounting code (FOAP) combinations and name them under **Code Favorites**. You will want to add your most used FOAP allocation and make it your default. You can also save frequently used allocations.

My Profile ▶ Custom Field and Accounting Code Defaults

**Kerri Reece**

User Name kreece

User Profile and Preferences >  
Update Security Settings >  
Default User Settings <  
**Custom Field and Accounting Code Defaults**  
Default Addresses  
Cart Assignees  
Payment Options  
User Roles and Access >  
Ordering and Approval Settings >  
Permission Settings >  
Notification Preferences >  
User History >  
Administrative Tasks >

**Custom Field and Accounting Code Defaults**

Header (int.) Codes **Code Favorites** Internal Information ?

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

**Add**

**Accounting Codes** ?

Procurement Edit Delete

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	no value	4650 Gen Admin and Logistical Services	no value

Travel Edit Delete

Chart	Fund	Organization	Account	Program	Activity
U University of Memphis	110001 Undesignated E and G	542000 Procurement Services	73200 Individual Out of State Travel	4650 Gen Admin and Logistical Services	no value

Click **Add**. An Accounting Code box opens. Type in a name for your FOAP. Use the check bos to choose you Default allocation. You can type in the numbers, select from your profile codes (see additional Intructions), or select from a list of all the codes available. You can leave parts blank, depending on your needs. **Save** when you are finished.

**Accounting Codes** ? X

Nickname Travel ☒ Default

Chart	Fund	Organization	Account	Program	Activity	
U Select from profile values... Select from all values...	110001 Select from profile values... Select from all values...	542000 Select from profile values... Select from all values...	73200 Select from profile values... Select from all values...	4650 Select from profile values... Select from all values...		add split

**Save** Cancel

## Notification Preferences (Best practice):

Users can make selections of various steps in the Tigerbuy workflow process to be notified of. A notification can be sent by email or as a notification # in the Banner Bell.

Click **Edit Section** to open the selection screen:

The screenshot shows the 'Notification Preferences: Shopping, Carts & Requisitions' page for user Kerri Reece. The left sidebar lists various settings, with 'Shopping, Carts & Requisitions' selected. The main content area shows a table of notification preferences. The 'Edit Section' link is highlighted with a red box.

Notification	Selected
Prepared By - Cart Assigned Notice	None
Prepared By - PR line item(s) rejected	None
Prepared By - PR rejected/returned	None
Cart Assigned Notice	None
Receive PR and PO notifications for Carts Assigned to Me	None
PR submitted into Workflow	Email & Notification
PR pending Workflow approval	Email & Notification
PR Workflow Notification available	None
PR Workflow complete / PO created	None
PR line item(s) rejected	None

The Default for each item is No notifications. For each item that you want to receive notifications for choose "Override". The pulldown will appear and allow you to choose email, notification, or both. Save changes.

The screenshot shows the 'Notification Preferences: Shopping, Carts & Requisitions' page for user Kerri Reece. The 'PR submitted into Workflow' row is selected, and the 'Override' radio button is chosen. A dropdown menu is open, showing 'Email & Notification' selected. A red arrow points to the 'Save Changes' button.

Notification	Default	Override	Selected
Prepared By - Cart Assigned Notice	<input checked="" type="radio"/>	<input type="radio"/>	None
Prepared By - PR line item(s) rejected	<input checked="" type="radio"/>	<input type="radio"/>	None
Prepared By - PR rejected/returned	<input checked="" type="radio"/>	<input type="radio"/>	None
Cart Assigned Notice	<input checked="" type="radio"/>	<input type="radio"/>	None
Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/>	<input type="radio"/>	None
PR submitted into Workflow	<input type="radio"/>	<input checked="" type="radio"/>	Email & Notification
PR pending Workflow approval	<input type="radio"/>	<input checked="" type="radio"/>	None
PR Workflow Notification available	<input checked="" type="radio"/>	<input type="radio"/>	None
PR Workflow complete / PO created	<input checked="" type="radio"/>	<input type="radio"/>	None

Requestors often want to know when Purchase Requisitions are submitted and approved. You may also want to know When Purchase orders get sent and items shipped. Under Purchase Orders)

The screenshot shows the 'Purchase Orders' notification preferences page. The left sidebar lists various settings, with 'Purchase Orders' selected. The main content area shows a table of notification preferences.

Notification	Default	Override	Selected
PO Workflow complete	<input checked="" type="radio"/>	<input type="radio"/>	None
PO sent to supplier	<input type="radio"/>	<input checked="" type="radio"/>	Email
PO Line Item Ship Notice	<input type="radio"/>	<input checked="" type="radio"/>	Email