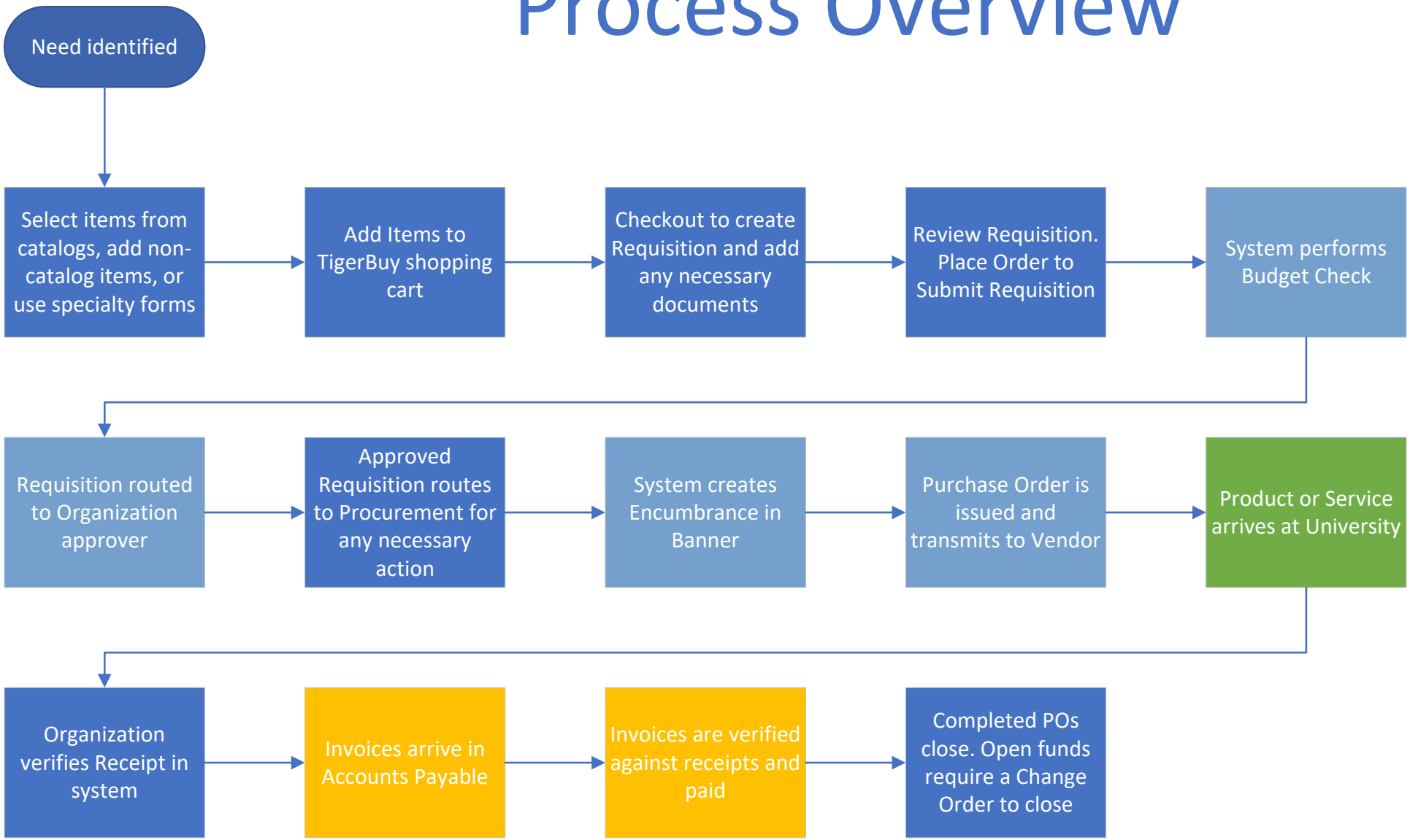
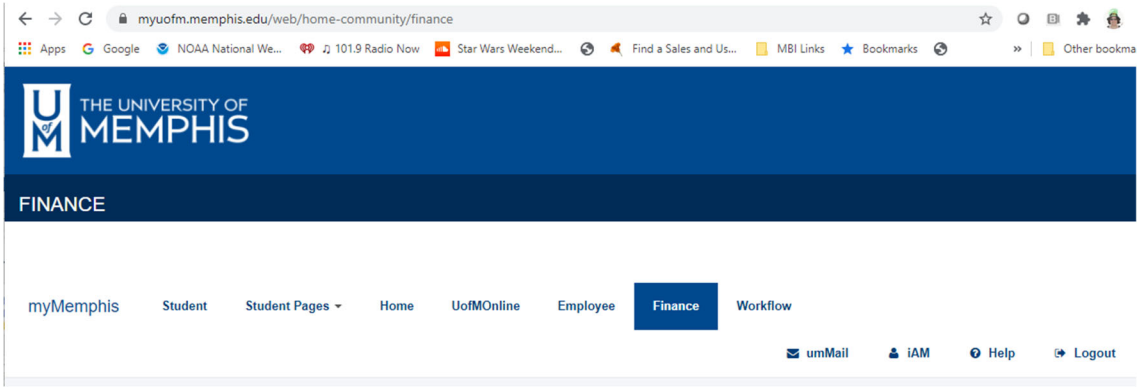
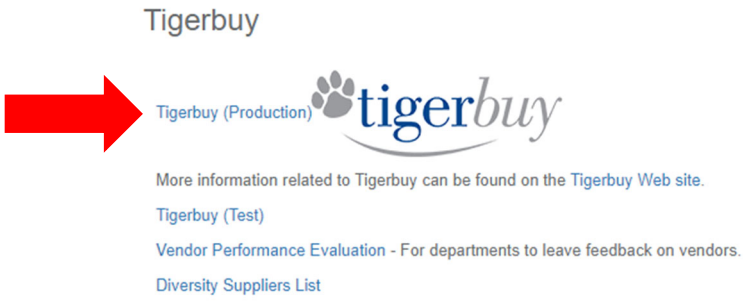
Process Overview



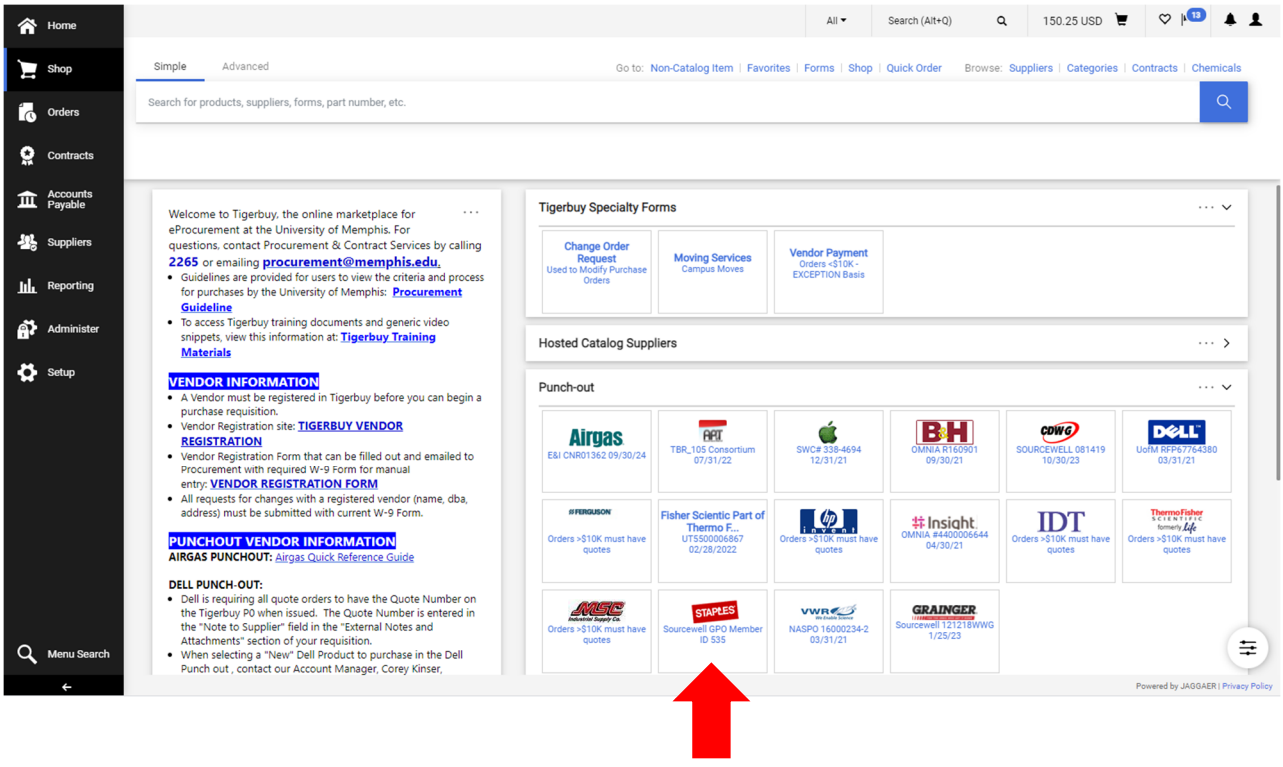
How to – Make a basic Staples order

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

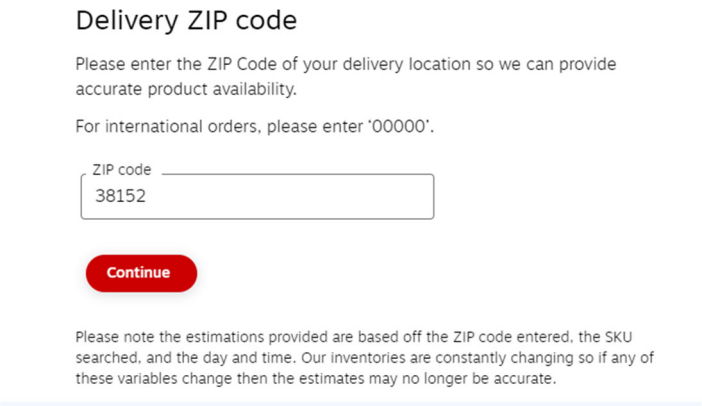




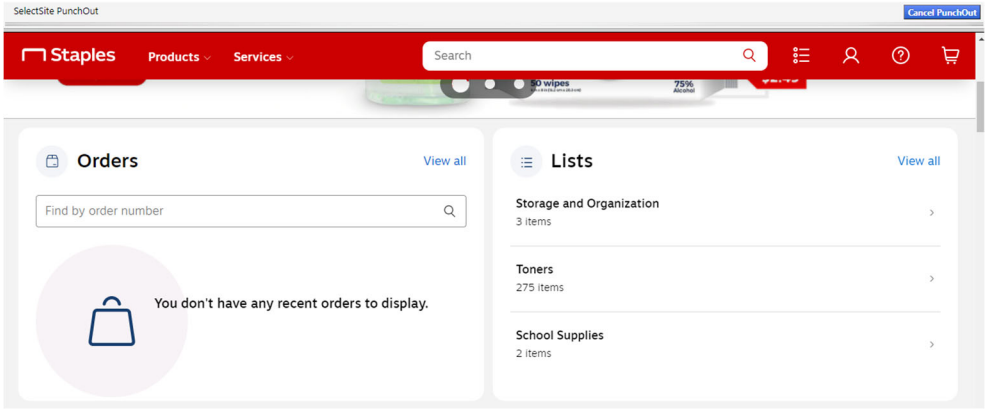
This will bring you to the shopping home page. Click on the Staples Punch Out Catalog button:



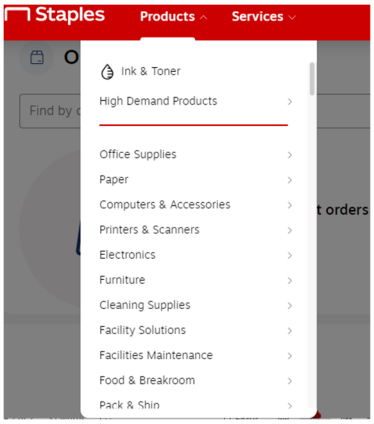
A screen comes up asking for the delivery zip code. Enter the zip code an click Continue.

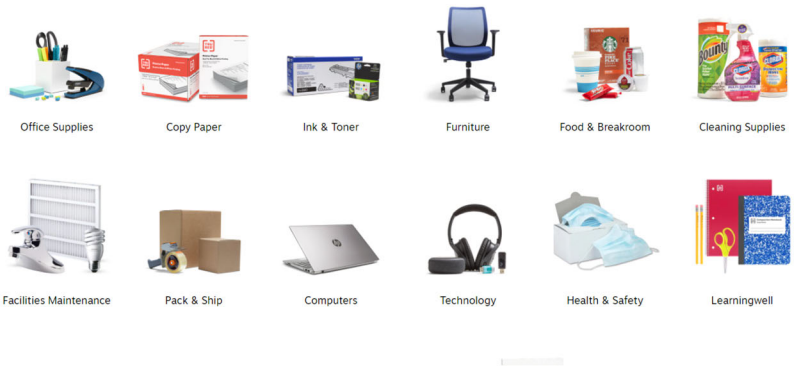


This brings up the Staples Catalog home page. You will see places to see past orders and create your shopping lists of frequently bought items. There is a search bar at the top.

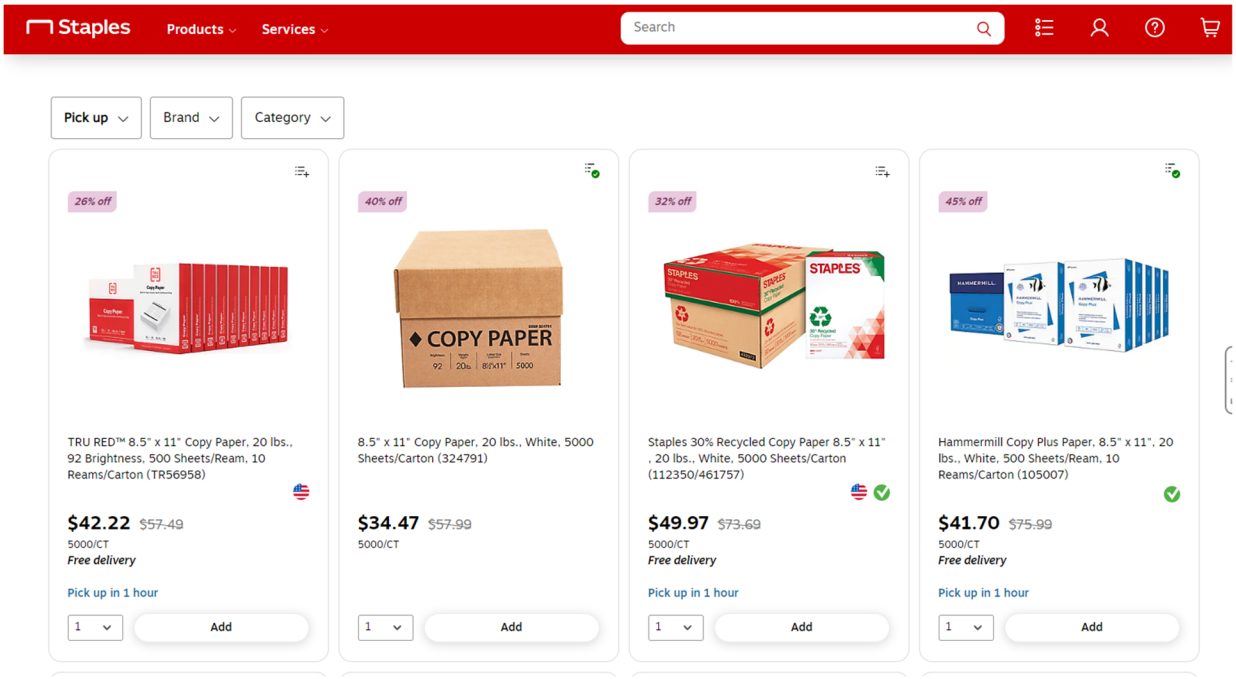


Use the Products menu at the top or scroll down to see product categories.



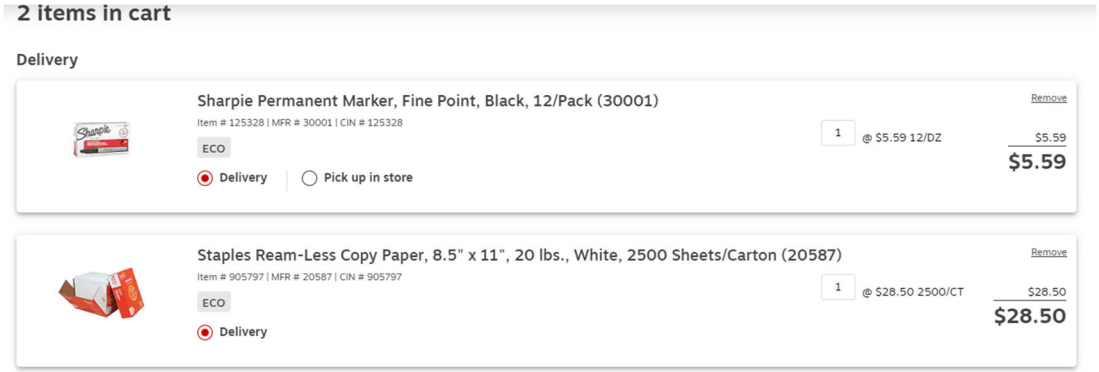


The catalog looks like any other shopping website. Choose items and add them to cart. Click on an item to go into the item information.



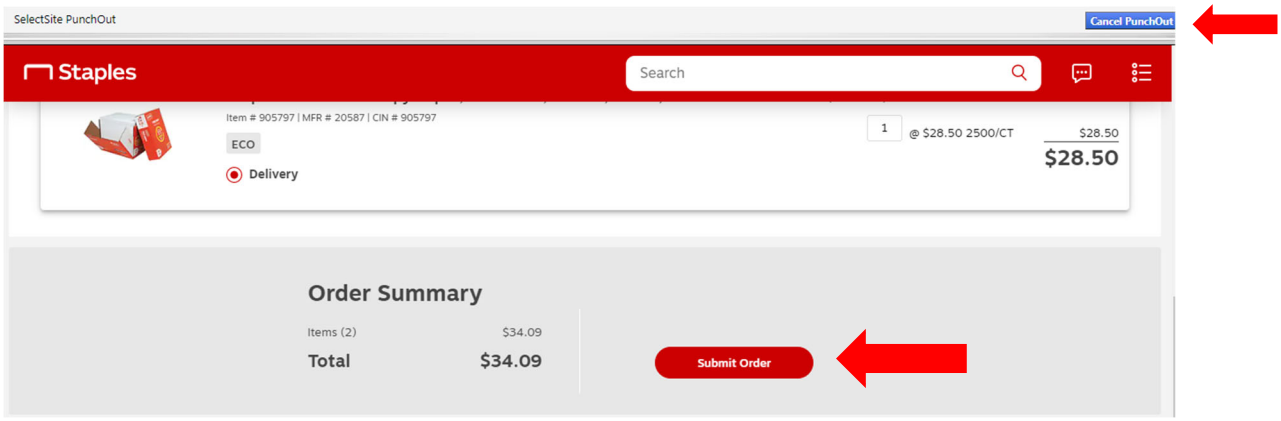
*Important note: The catalog has been set up to show allowable product categories, however some items fall into an allowable category, but are not appropriate for your area or purpose. It is your responsibility to ensure your purchases comply with all University policies and guidelines. * Blocked items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



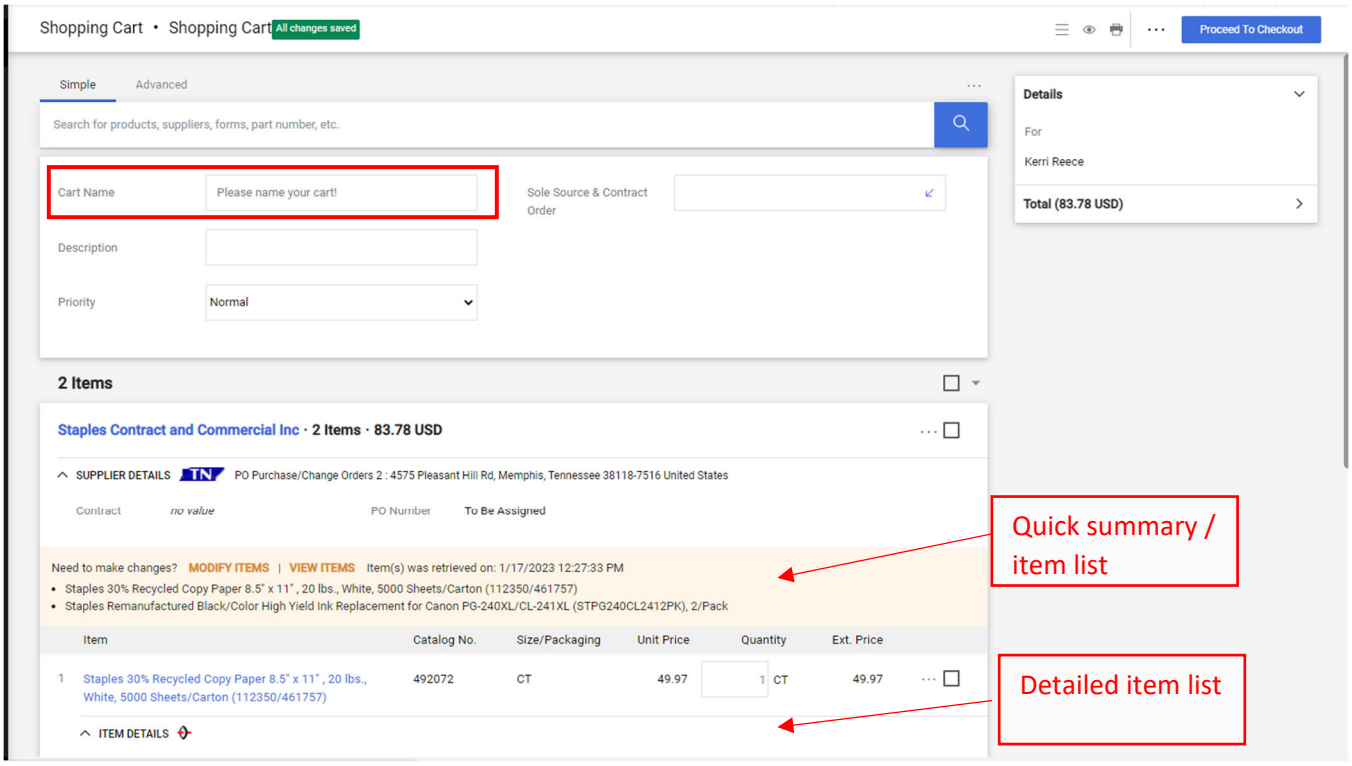
When all is as you wish, click **Submit order**. This is going to take your cart / order and send it back to your Tigerbuy shopping cart to finish building your **Requisition**.

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

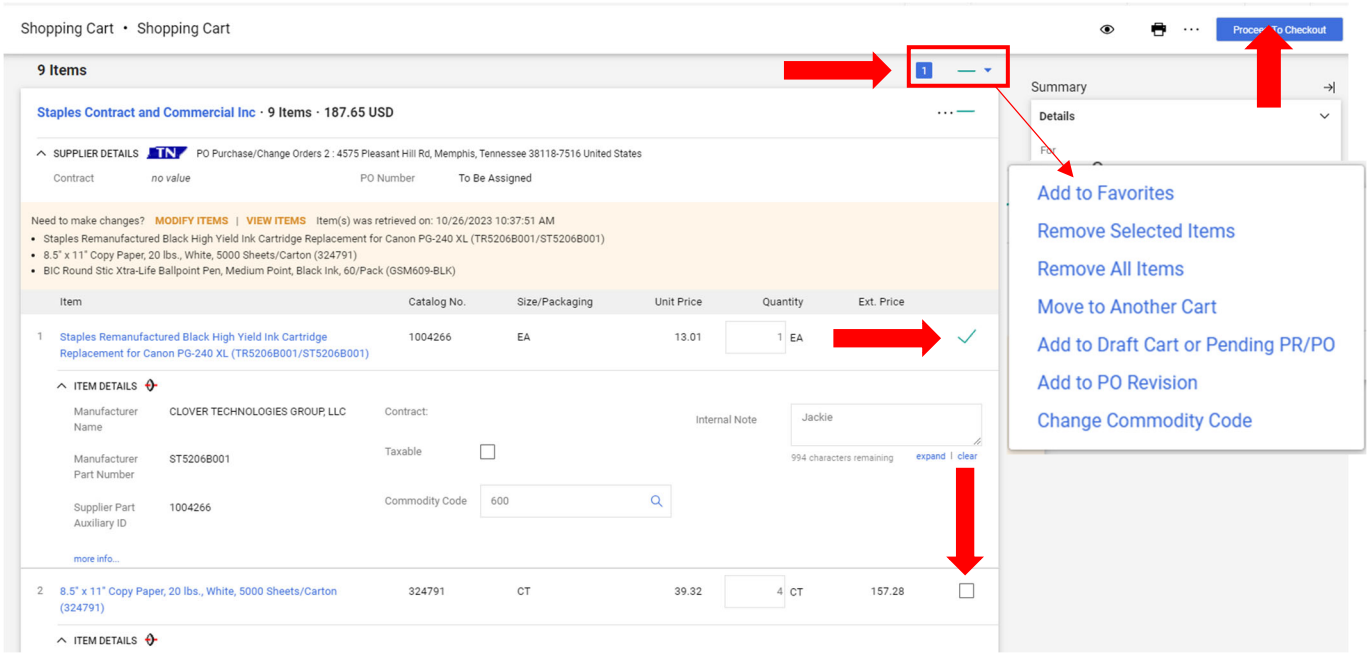


Your Tigerbuy Shopping cart now has all of your Staples items in it. You will have several chances to edit your items and your order information. The cart is for keeping items or removing them. Details of the purchase will happen in the Requisition stage.

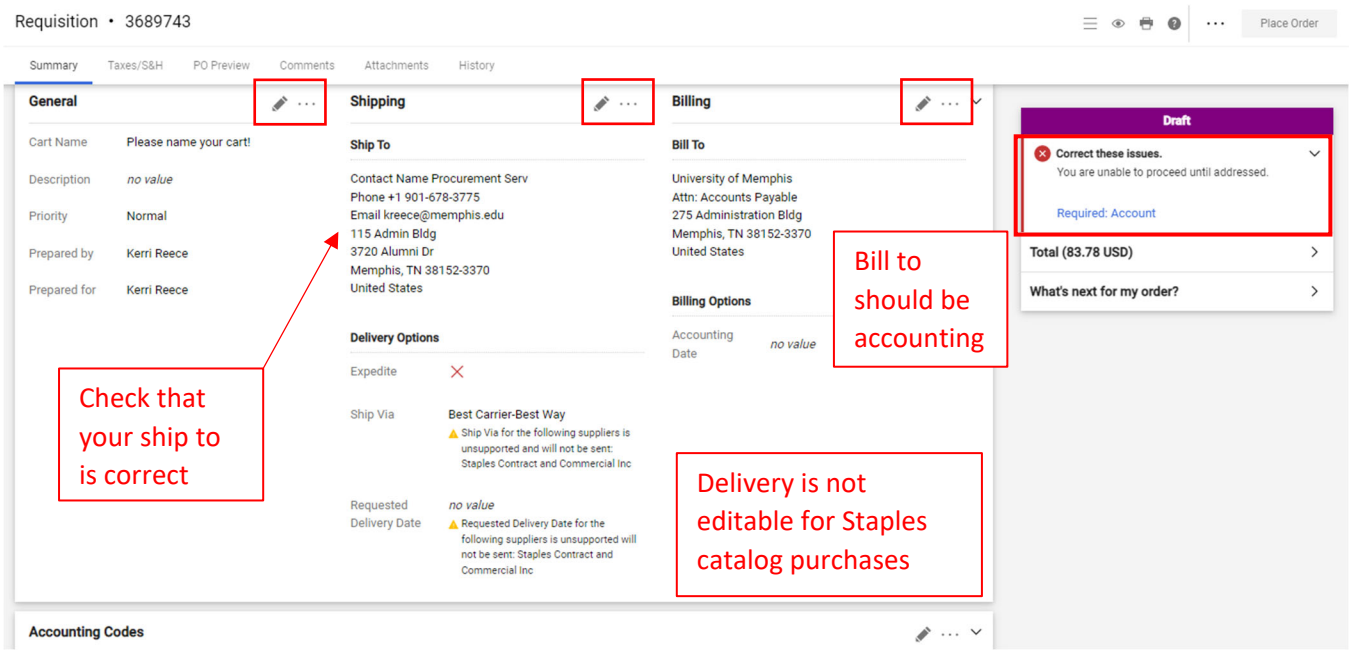
You will want to give your cart a name, such as “new office” or “grant supplies” to help you and your approver recognize it. This will assist your approver with approving your request via email.



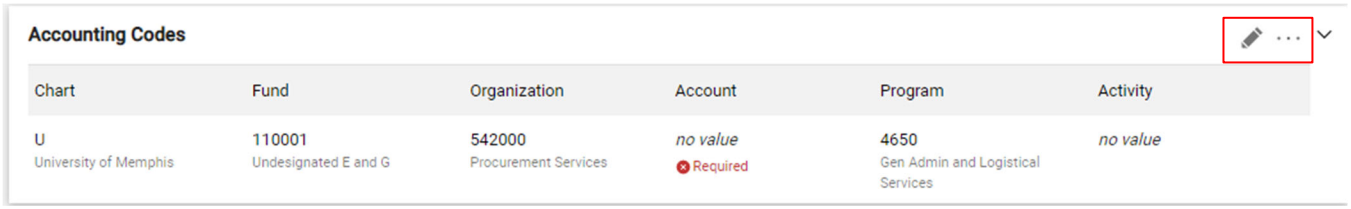
You have the ability to act on the line items in your cart. Click the check box on the line(s)and then click the blue pulldown arrow above the items section to see your options. You can work on them individually or act on several lines at once. When everything is ready to go, click the blue **Proceed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

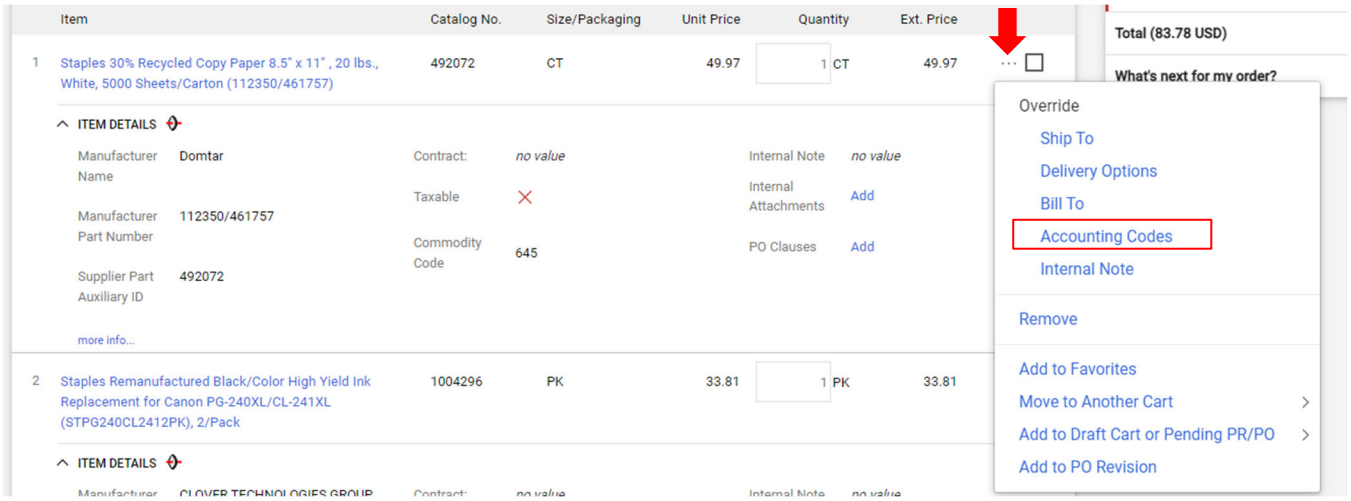


You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section.

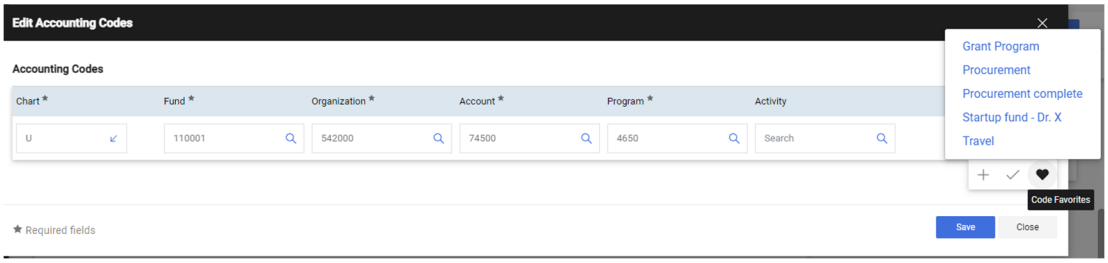


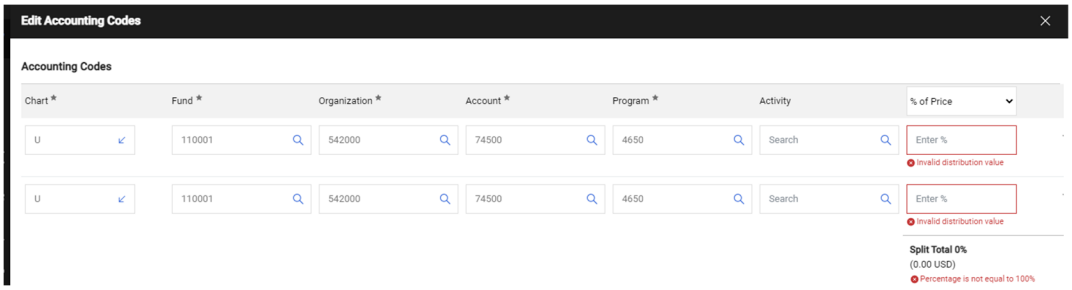
Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.



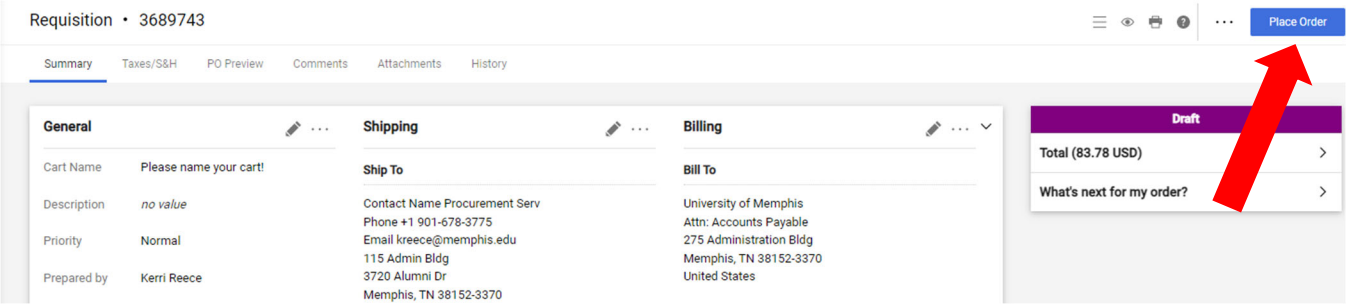


If you've set up Code Favorites in your profile, use the heart to access the list. Use the plus sign (+) to add another list to split the entire order into multiple accounting codes.

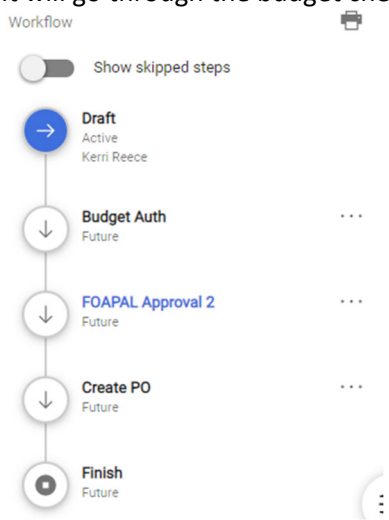




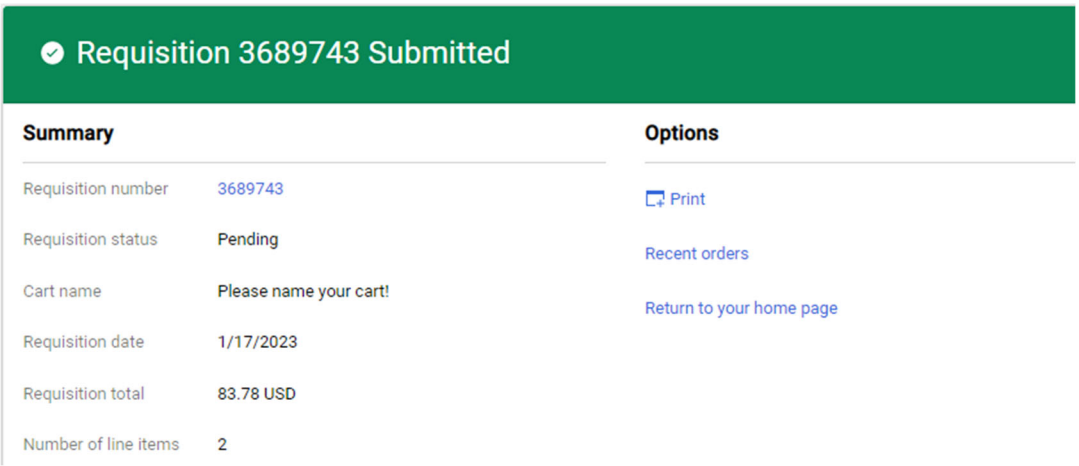
If your order is ready, click the blue **Place Order** button. Under the button you can see the next step your order will take. Scroll down to see the entire workflow.

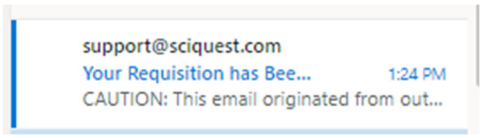


Your Requisition has now been submitted for approval.
It will go through the budget check and route to your financial manager for approval.



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





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 For Procurement questions use the below information: +1 901-678-2265 procurement@memphis.edu

Thank you,
University of Memphis

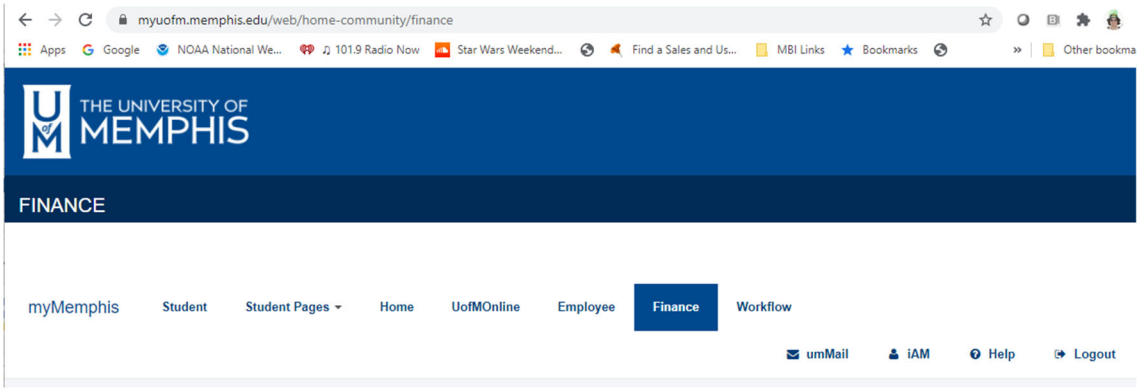
Your approved requisition will flow through Procurement and Banner will create an Encumbrance on your budget and issue a P0 number. Tigerbuy will then send the P0 to Staples electronically. Please note that once a staples order is transmitted electronically, we can't change or cancel it. Any corrections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

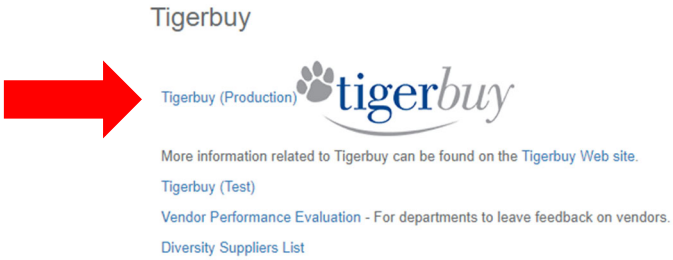
When you physically receive the items, you will need to **Receipt** them in the system (see Receipting instructions)

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

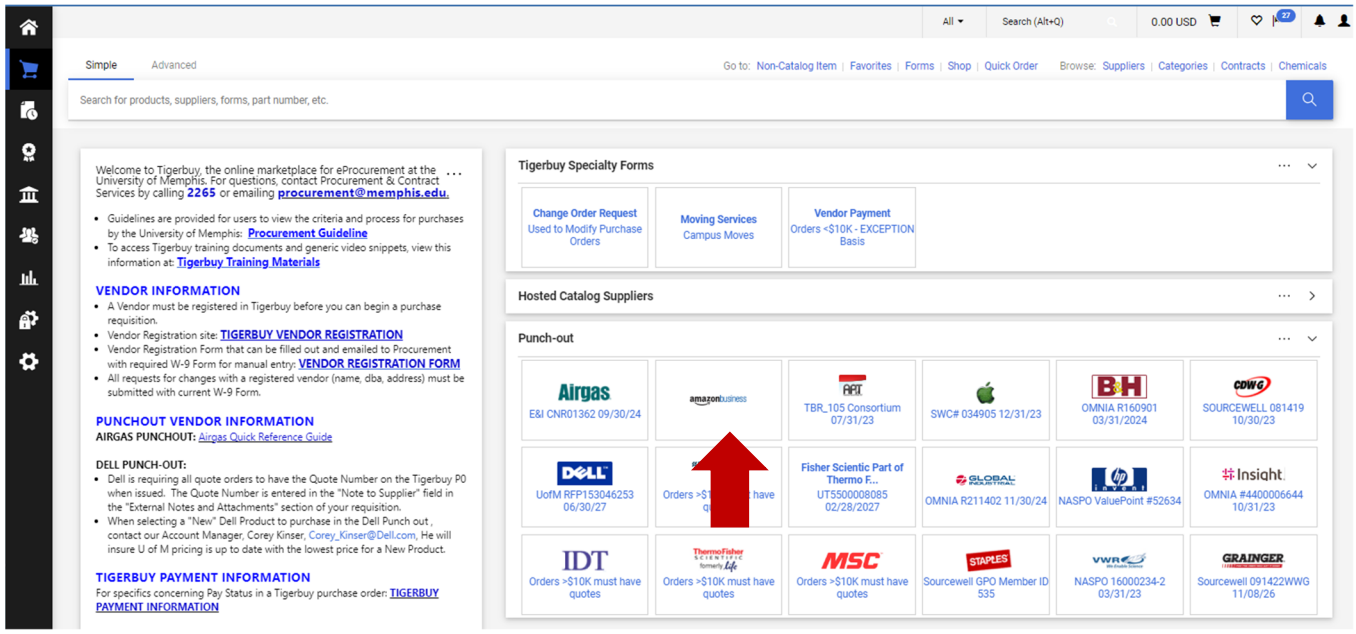
How to – Make a basic Amazon order

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

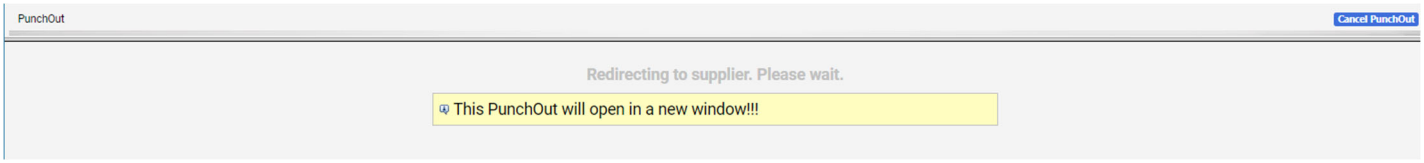




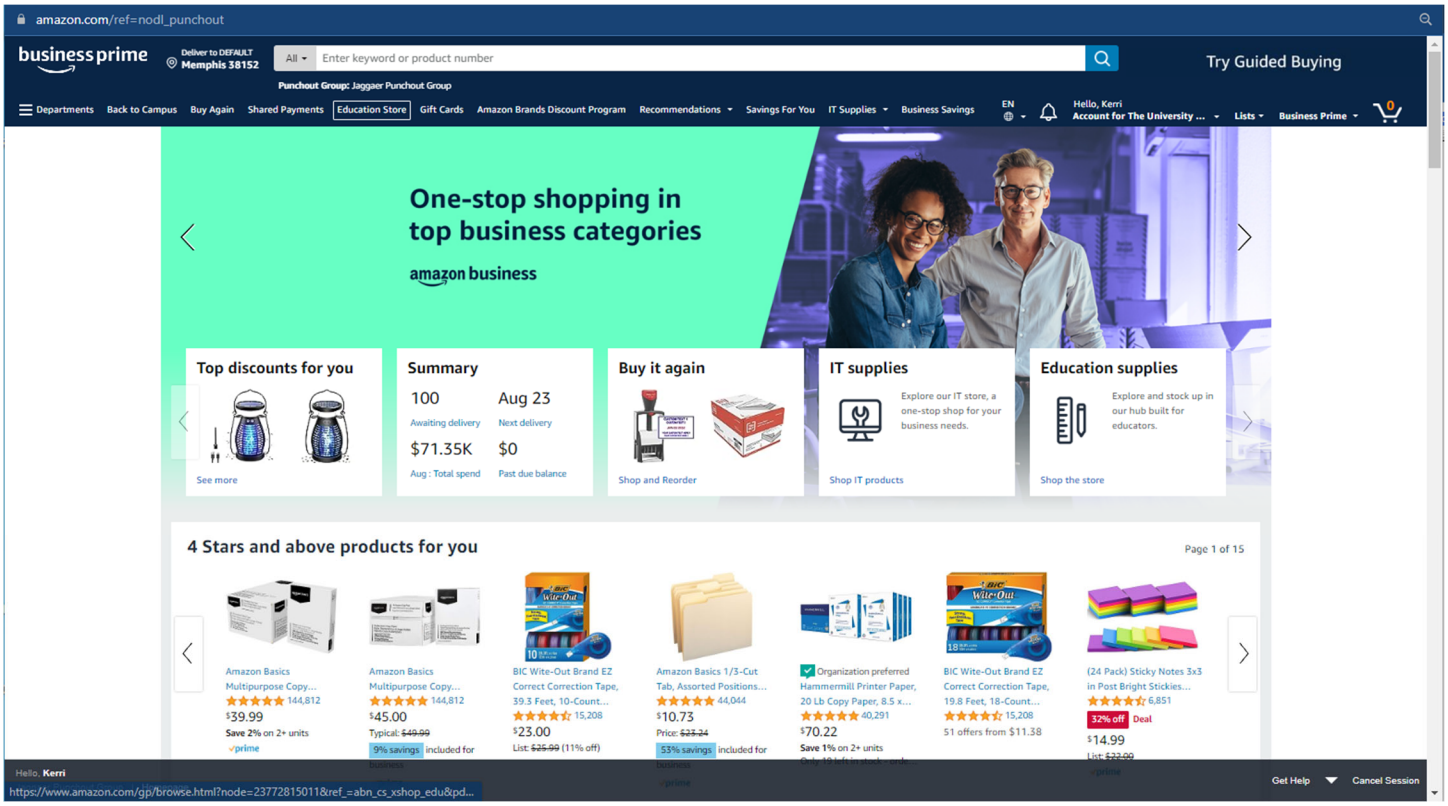
This will bring you to the shopping home page. Click on the **Amazon business** Punch Out Catalog button:



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



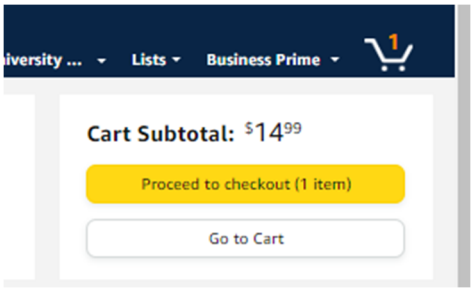
The Amazon home page opens in a separate window.



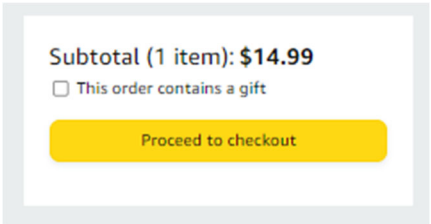
You will shop as normal, putting items into your cart.

*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.

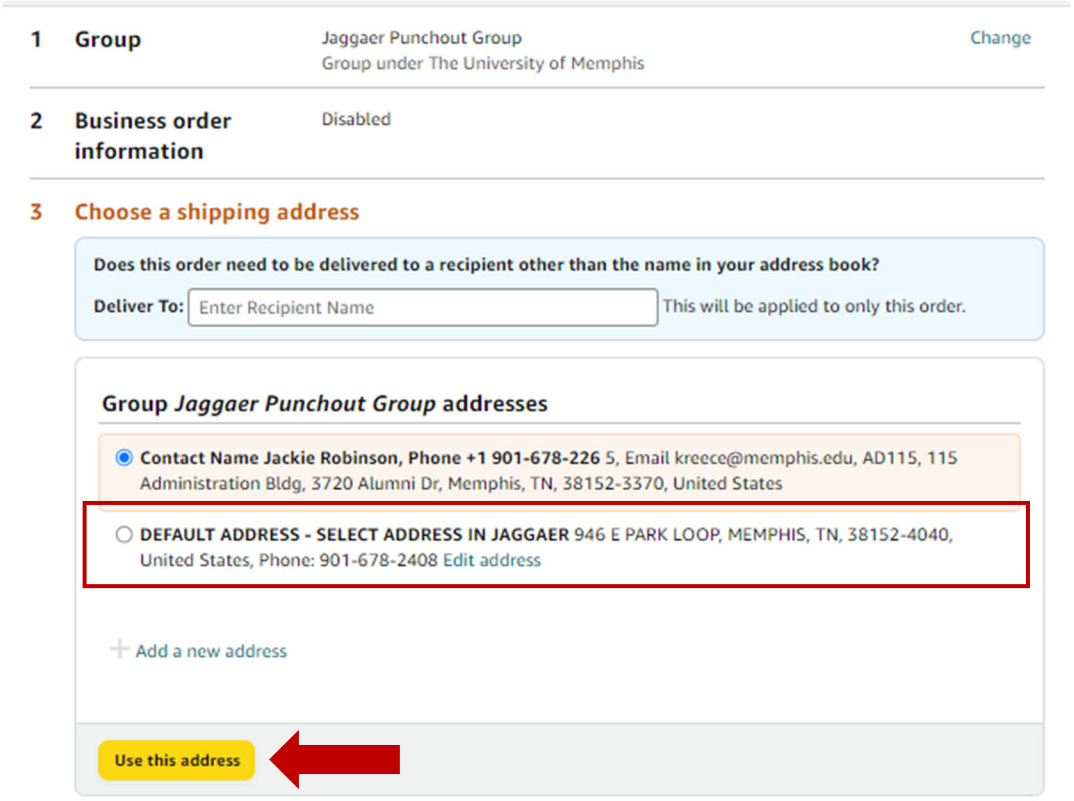
Once you have chosen your items, go to your cart to get ready for checkout. The cart shows your items, quantities, and prices. You can adjust quantities or remove items from the cart.



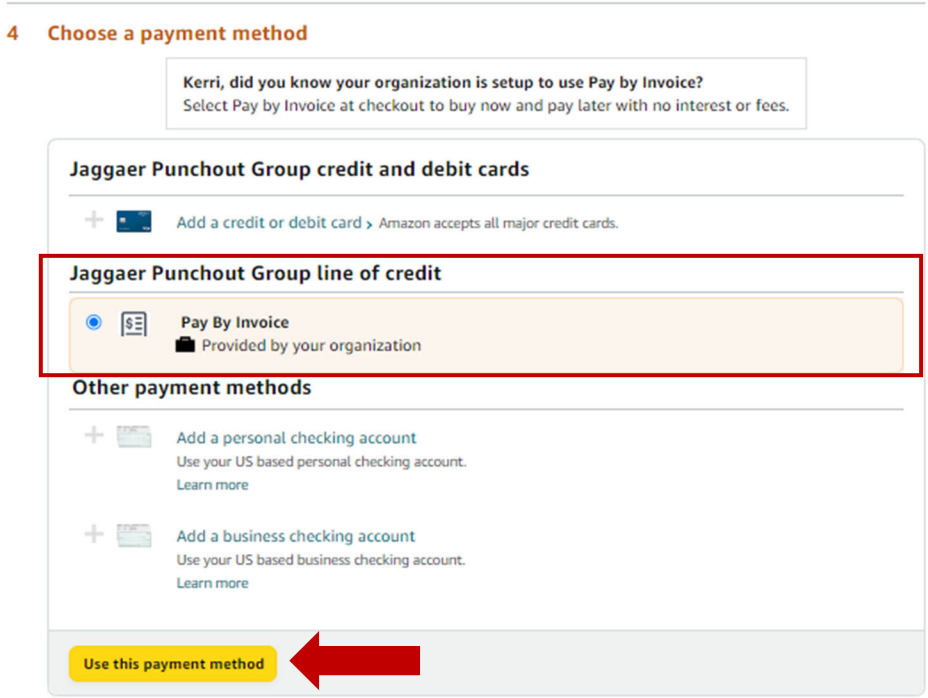
When all is as you wish, click **Proceed to Checkout**. This is going to take you to the Amazon checkout page.



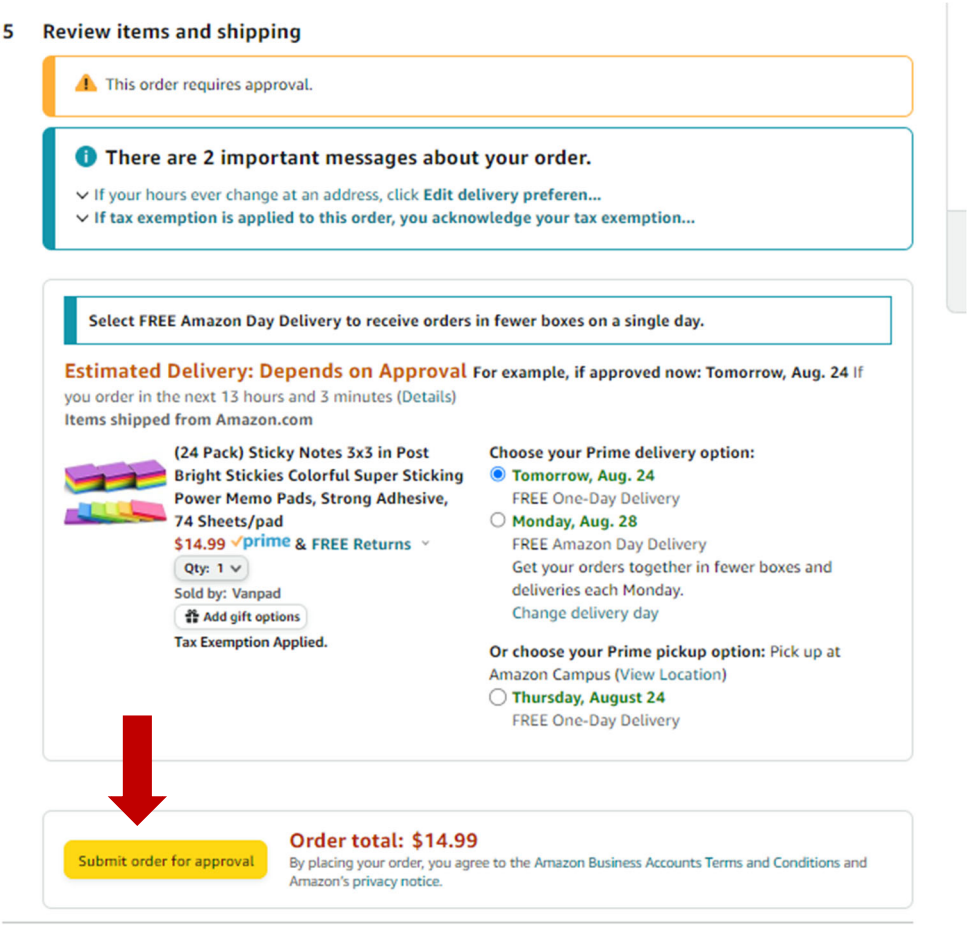
Sections 1, 2, and 3 will autofill. Leave 1 and 2 alone. If this is your first Amazon punchout order, you will get the Default company address in Section 3. **THIS IS OK**. You will choose the address you need when you complete the order in Tigerbuy. Click **Use this address**.



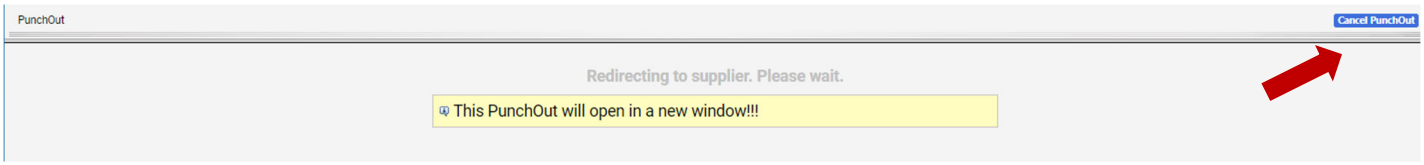
Section 4 choose **Pay by Invoice.** Click **Use this payment method.**



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**.



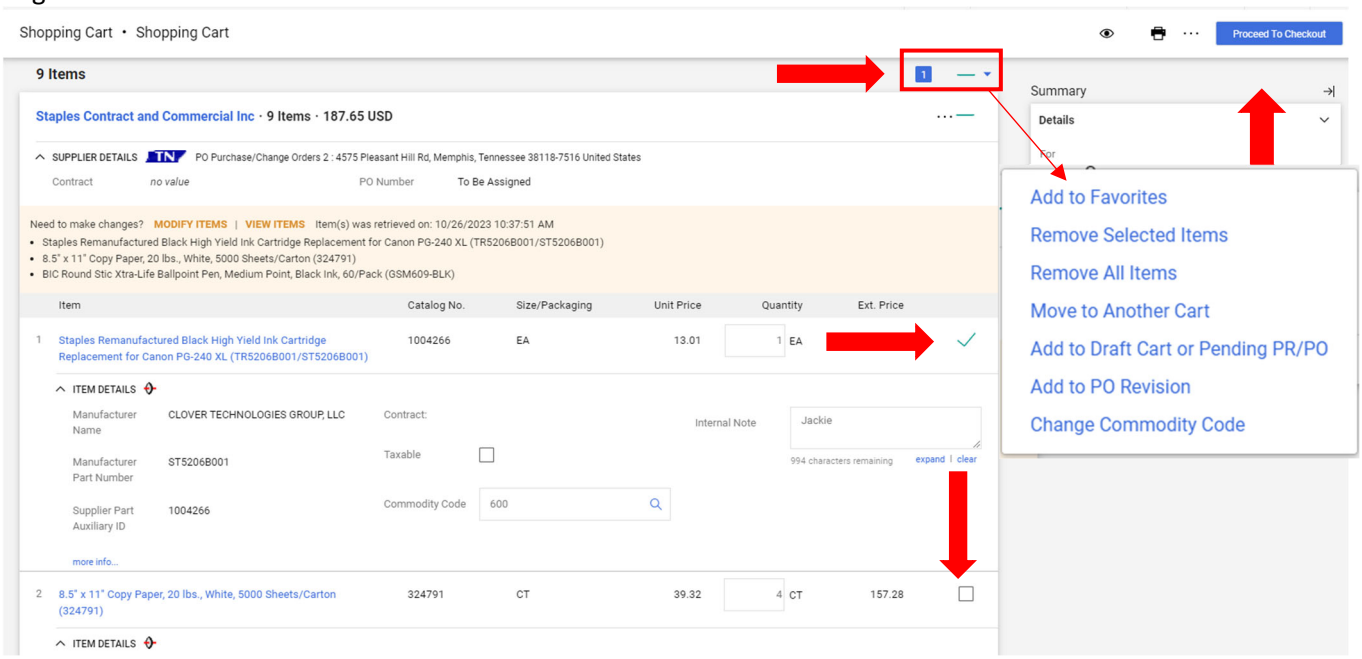
If you want to leave without bringing your items into Tigerbuy, close the Amazon window and click the blue **Cancel Punchout** button.



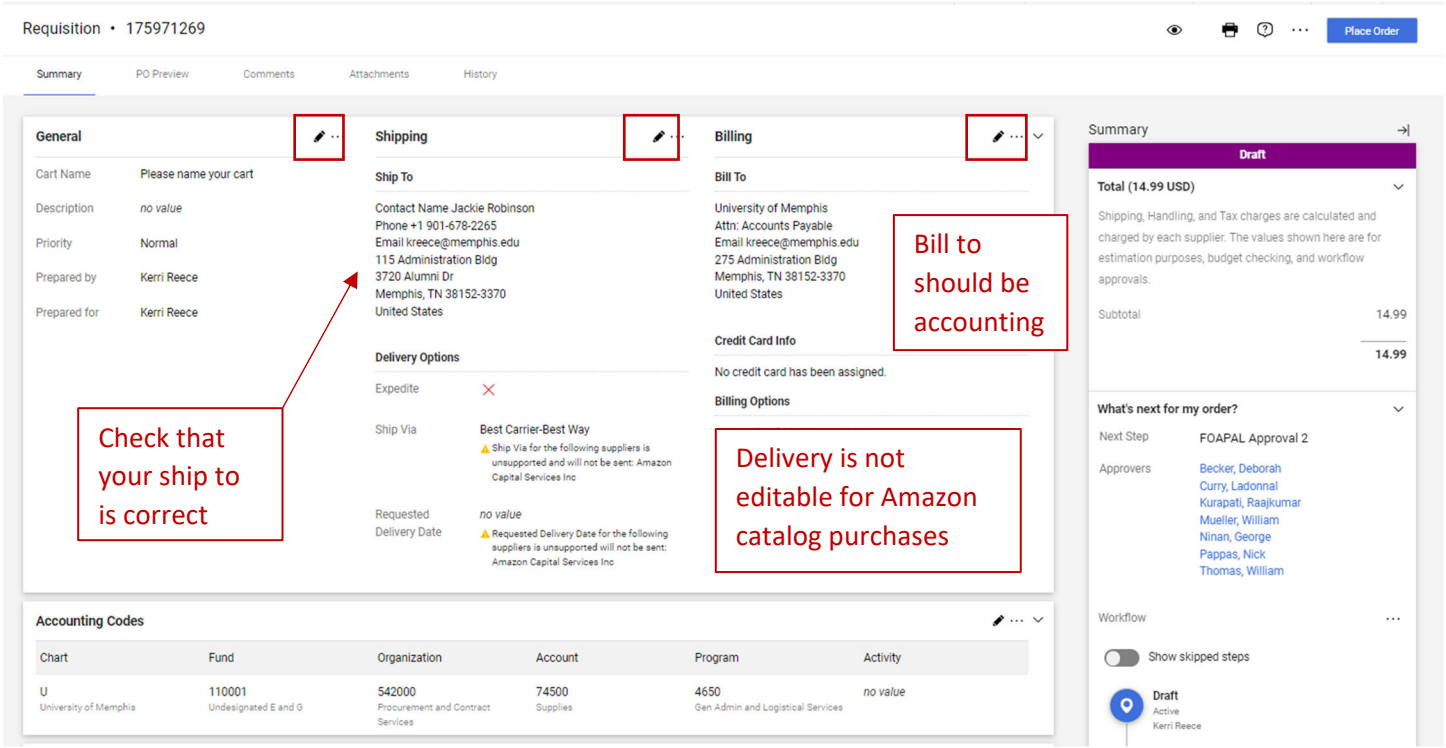
Your Tigerbuy Shopping cart now has all of your Amazon items in it. You will have several chances to edit your items and your order information. The cart is for keeping items or removing them. Details of the purchase will happen in the Requisition stage.

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.

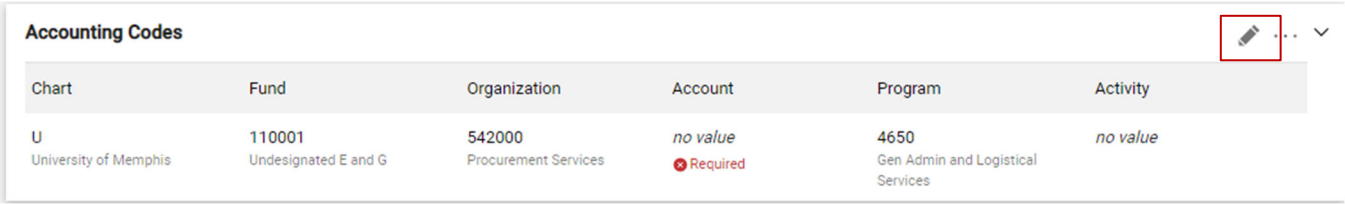


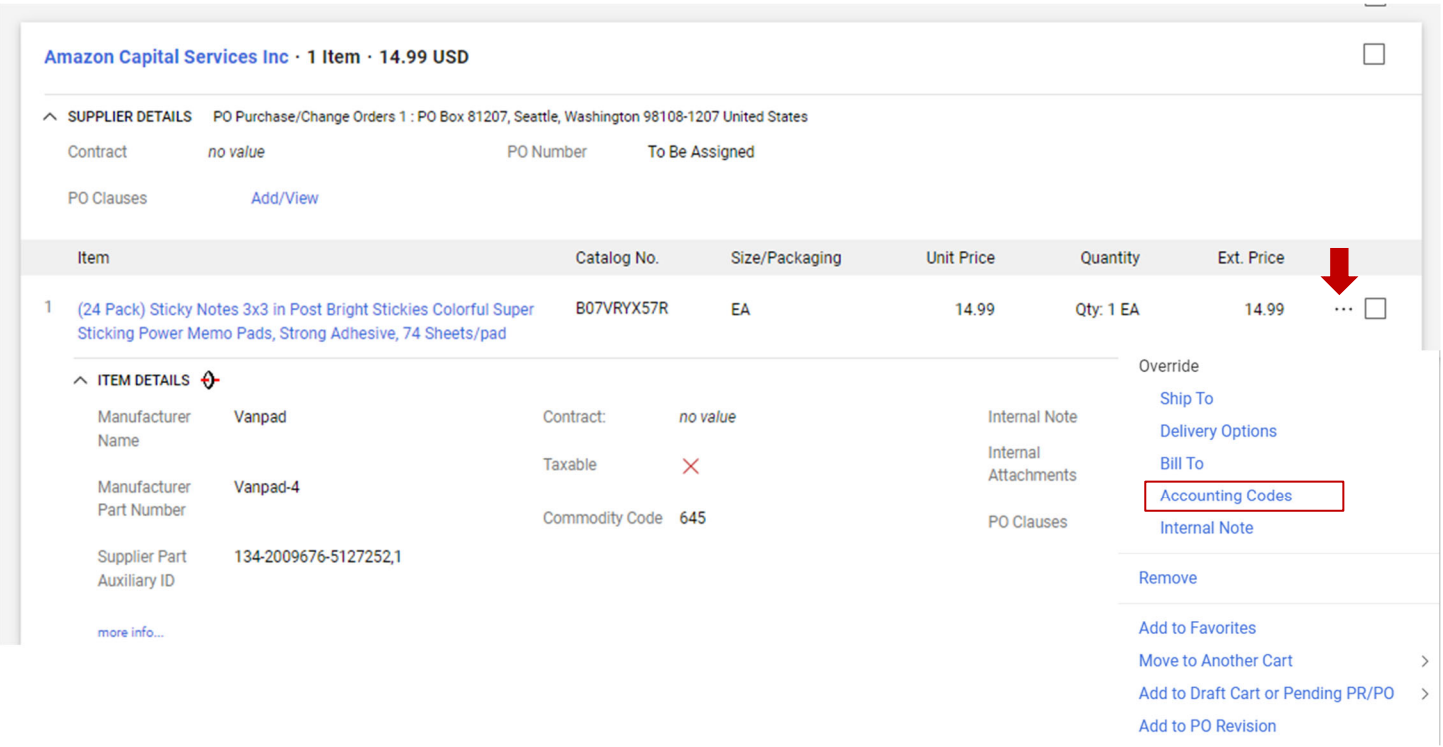
You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section.



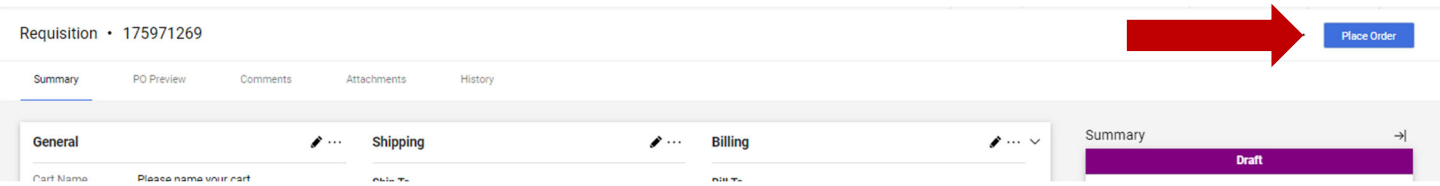
Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.

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.





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



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 P0 number. Tigerbuy will then send the P0 to Amazon electronically.

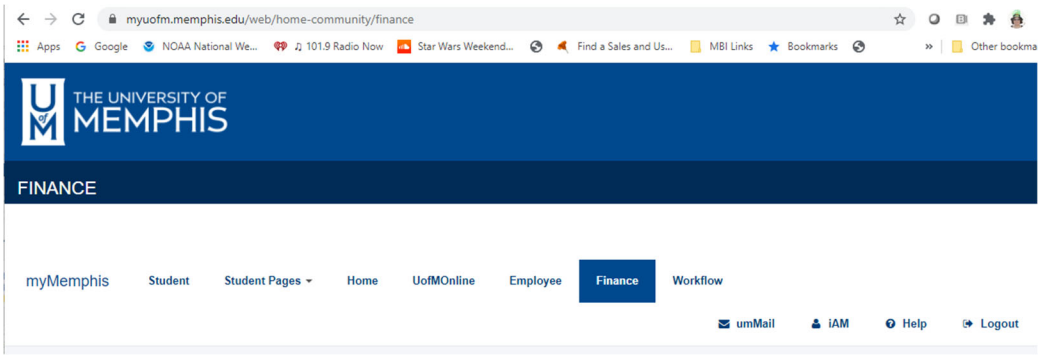
When you physically receive the items, you will need to **Receipt** them in the system (see Receipting instructions)

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

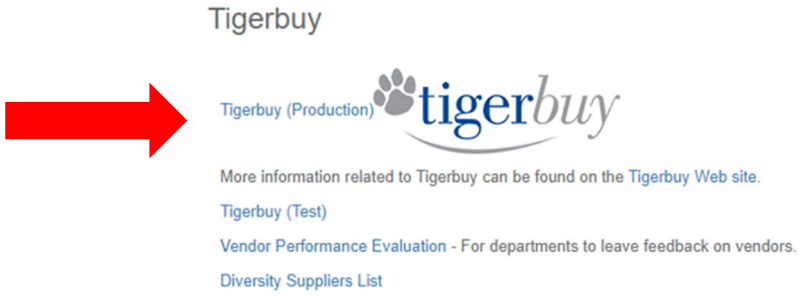
How to - Tigerbuy Non-Catalog Order

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.

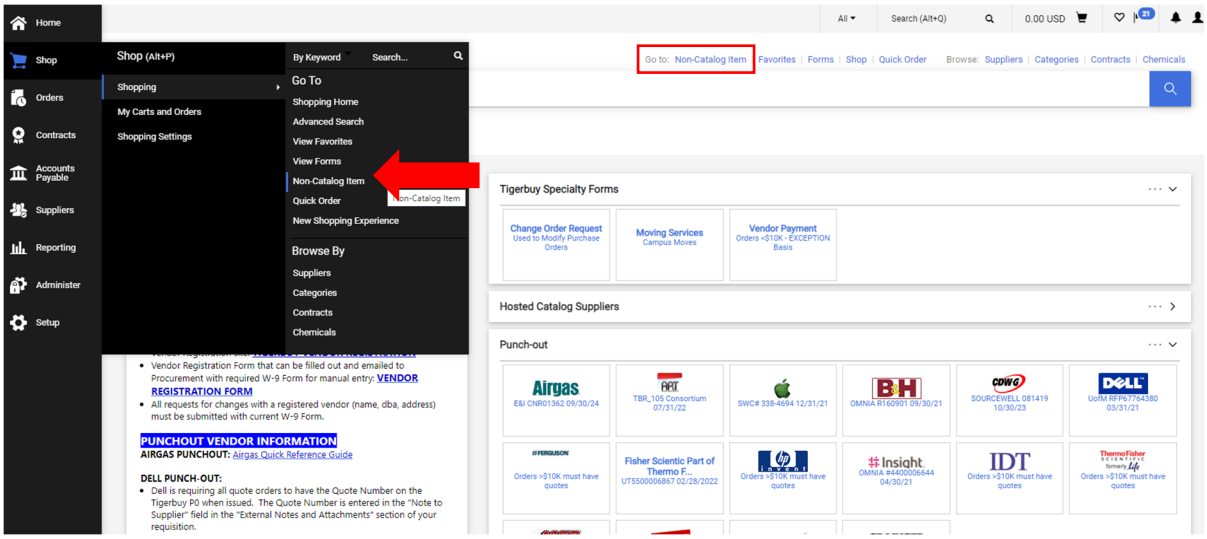
Log into My Memphis & go to the **Finance** tab:

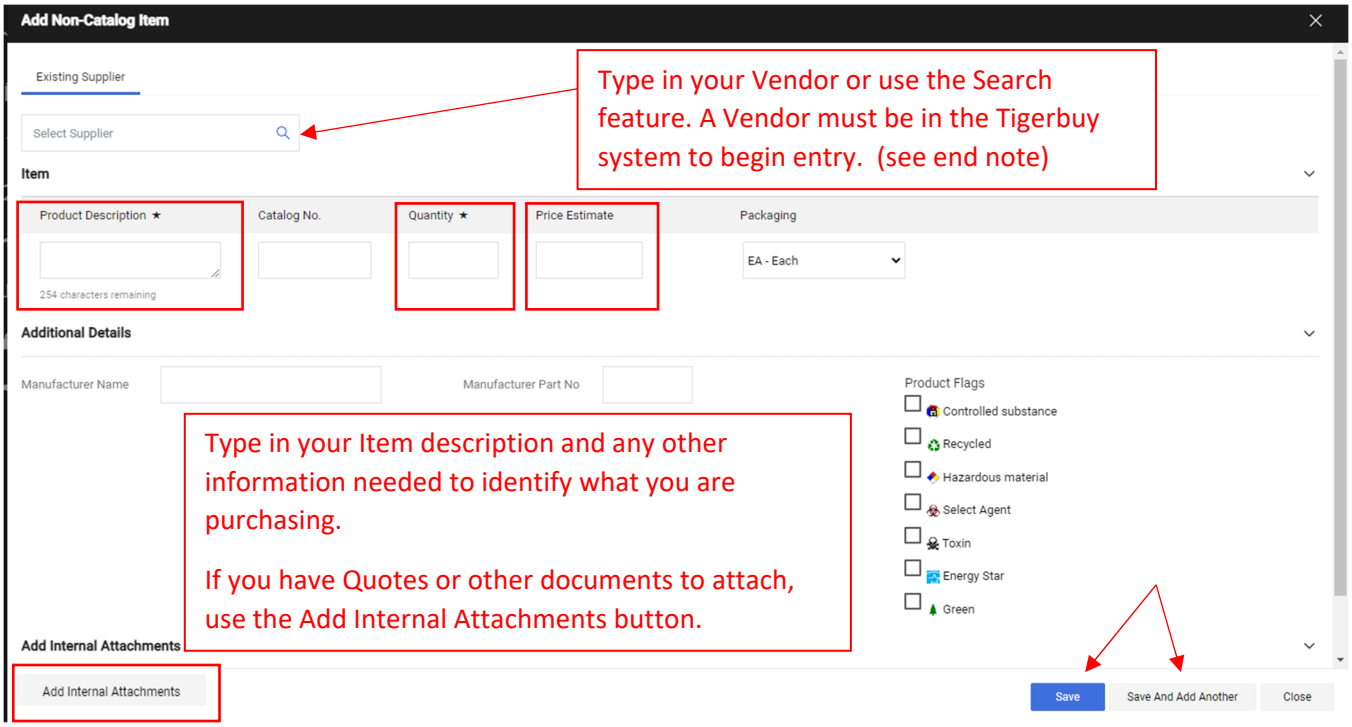


Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**



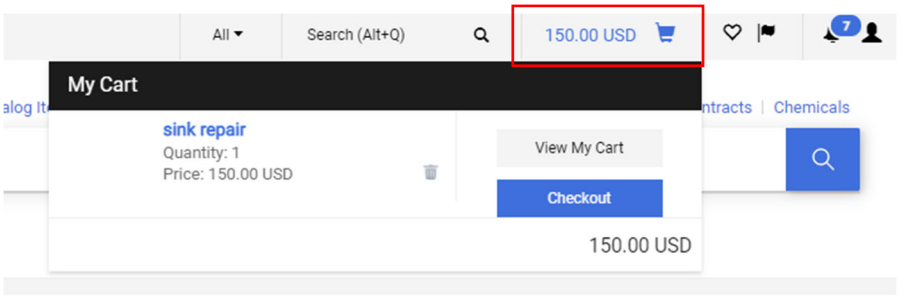
Tigerbuy opens on the Home screen. Click on **Go to: Non-Catalog item** at the top or **Shop / Shopping / Non-Catalog item** on the left menu.





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.

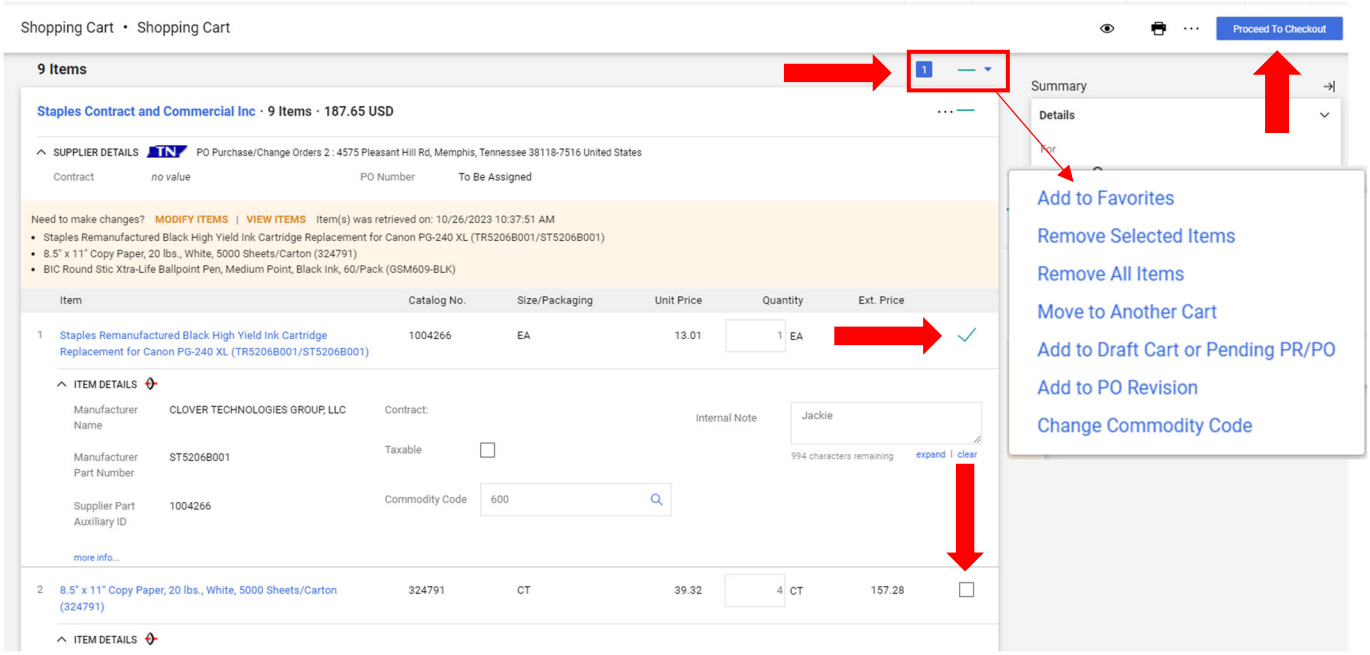
When you are sent back to the Home screen, navigate to your cart to finalize your Requisition.



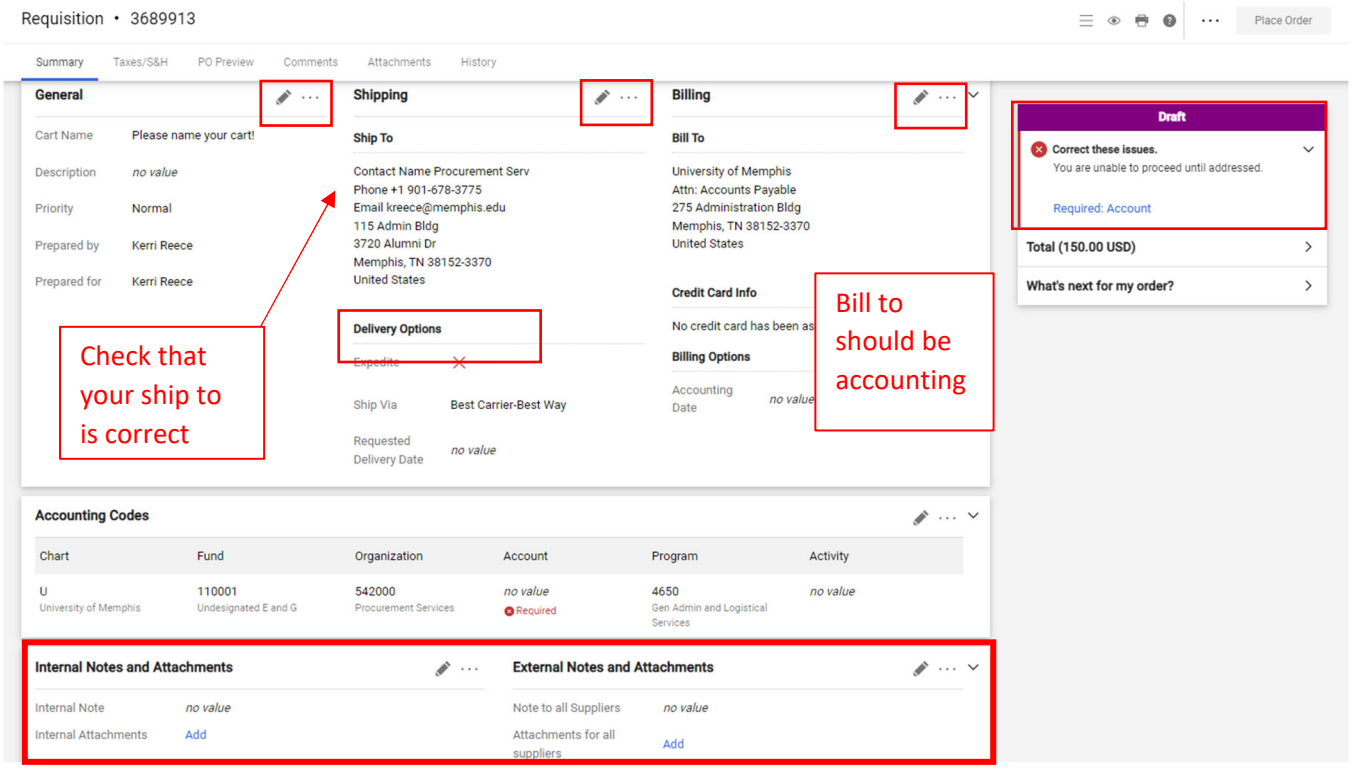
Your Tigerbuy Shopping cart now has all of your non-catalog items in it. You will have several chances to edit your items and your order information. The cart is for keeping items or removing them. Details of the purchase will happen in the Requisition stage.

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.

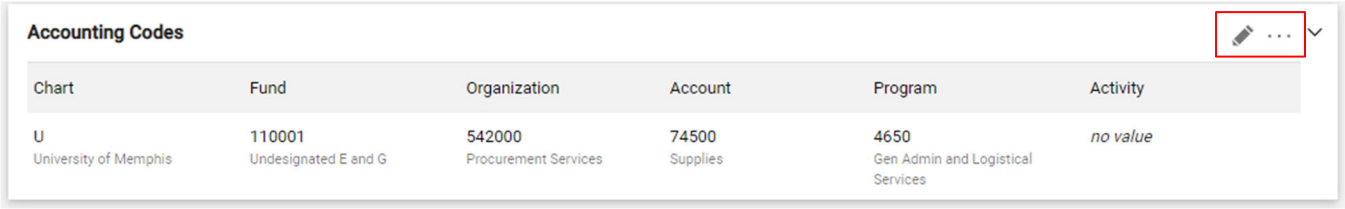
Review your cart. You have the ability to act on the line items in your cart. Click the check box on the line(s)and then click the blue pulldown arrow above the items section to see your options. You can work on them individually or act on several lines at once. When everything is ready to go, click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

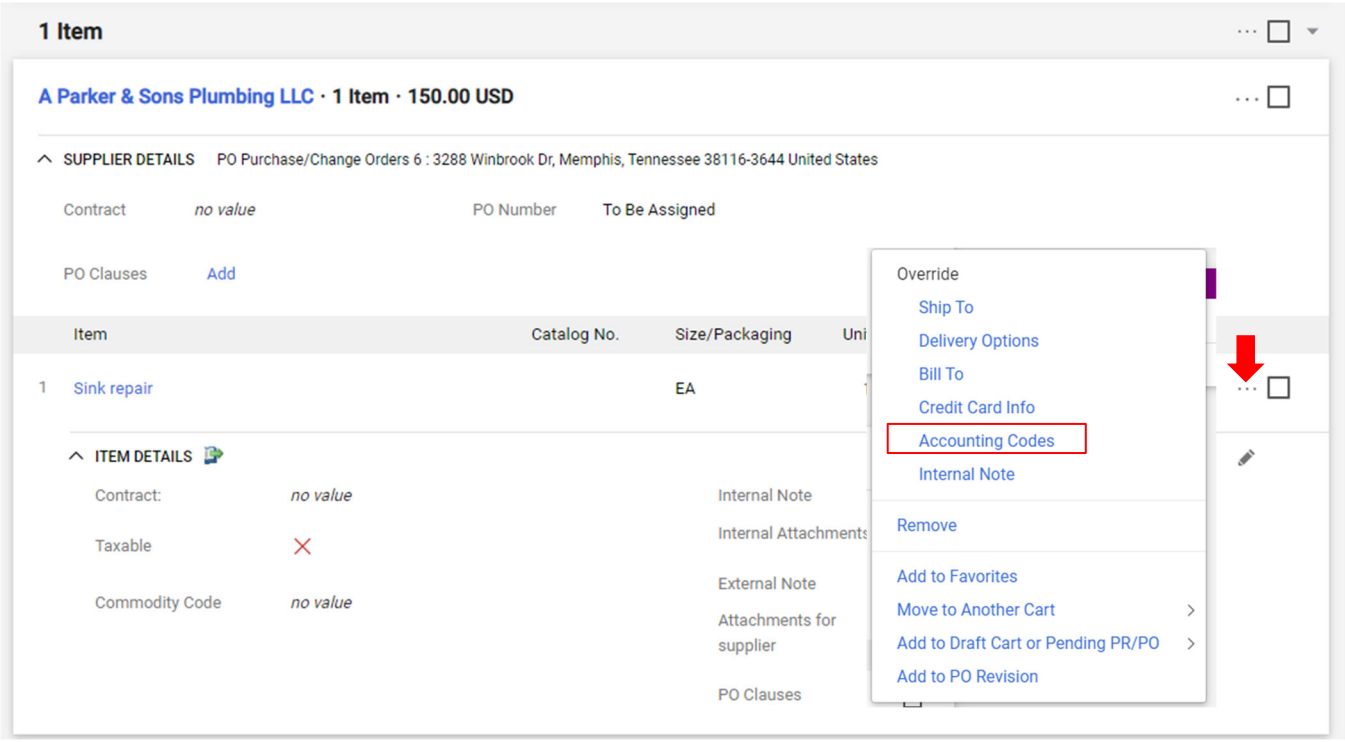


You now have a **Draft Requisition** with an assigned Requisition number. All details are available for your review. Any errors will be called out in the top right section. You can edit sections using the pencil or ellipses links top right of each section. Documents can be attached in the Notes & Attachments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

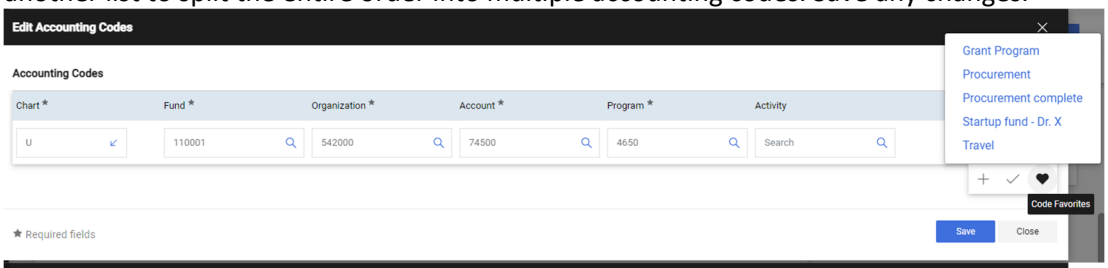


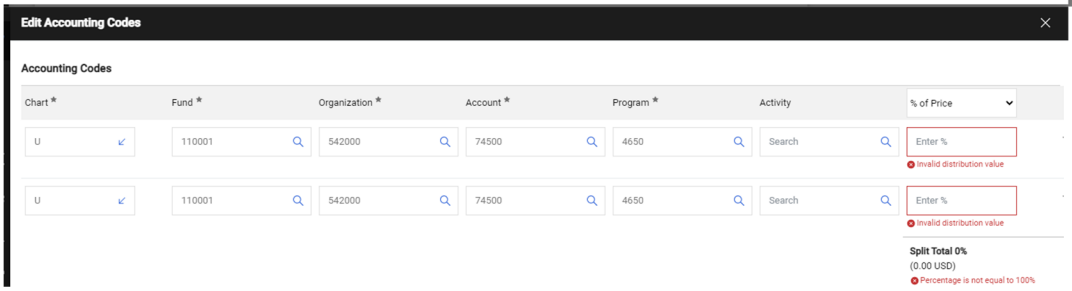
Scroll down to check your FOAP allocations for the overall order. Use the pencil or ellipses buttons to edit this. You can reallocate individual lines using the ellipses on each line.



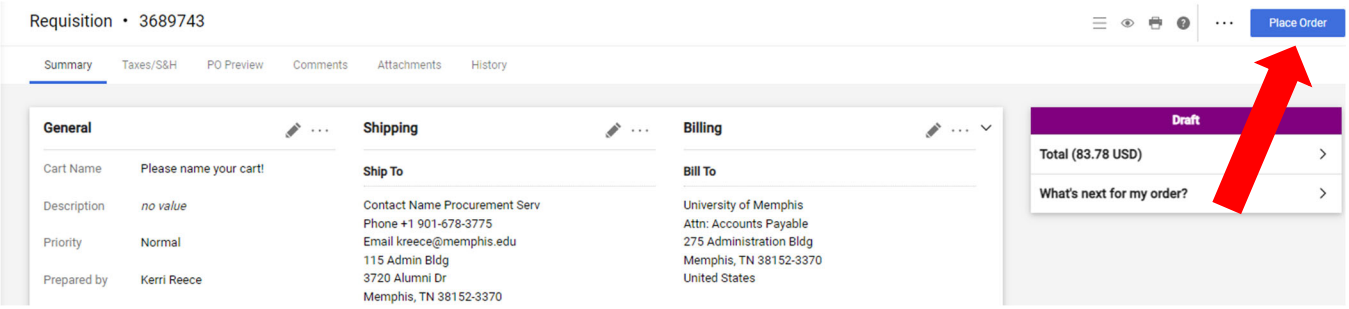


If you've set up Code Favorites in your profile, use the heart to access the list. Use the plus sign (+) to add another list to split the entire order into multiple accounting codes. Save any changes.



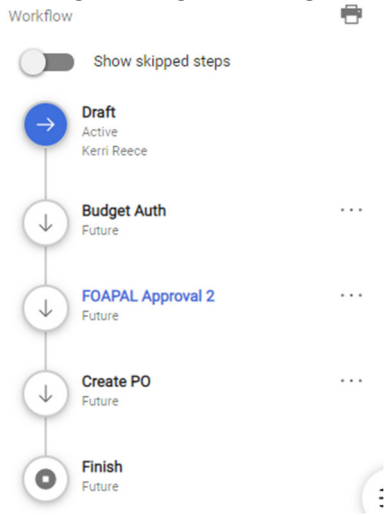


If your order is ready, click the blue **Place Order** button. Under the button you can see the next step your order will take. Scroll down to see the entire workflow.

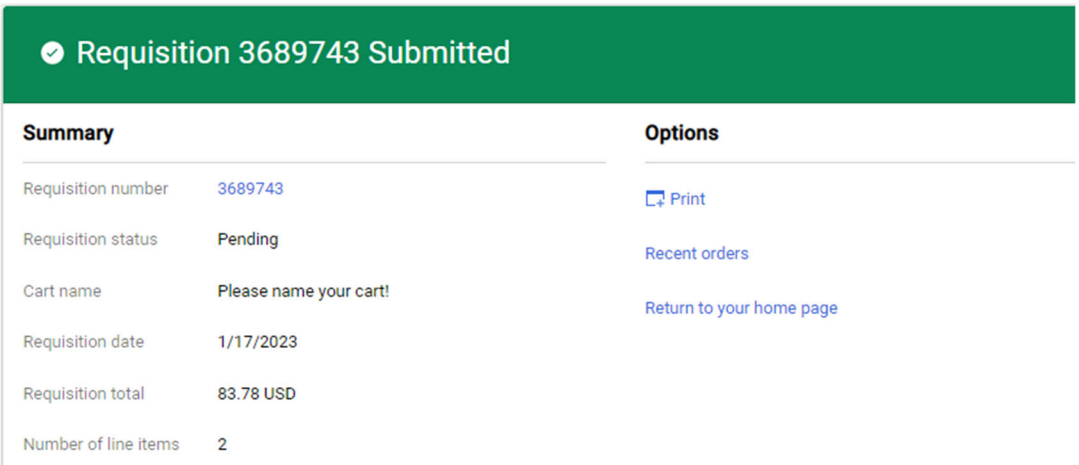


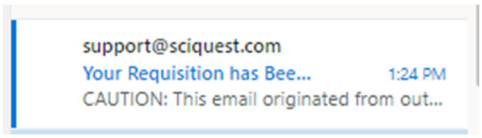
Your Requisition has now been submitted for approval.

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:





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 For Procurement questions use the below information: +1 901-678-2265 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 P0 number. Tigerbuy will then send the P0 to the vendor.

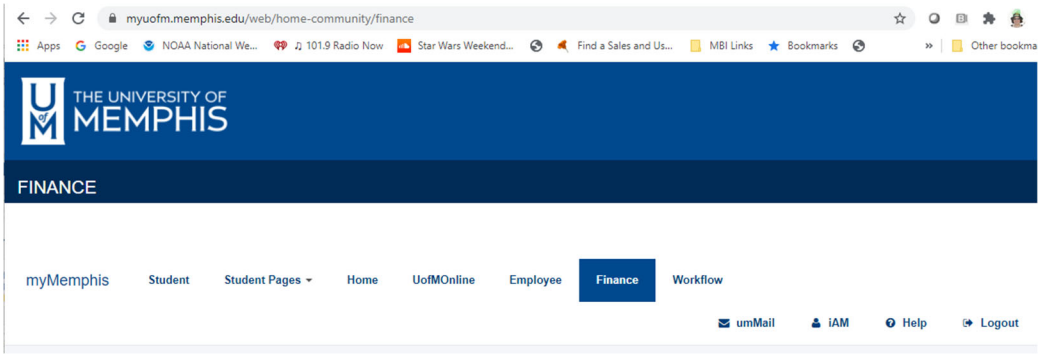
When you physically receive the item or service, you will need to **Receipt** it in the system (see Receipting instructions)

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

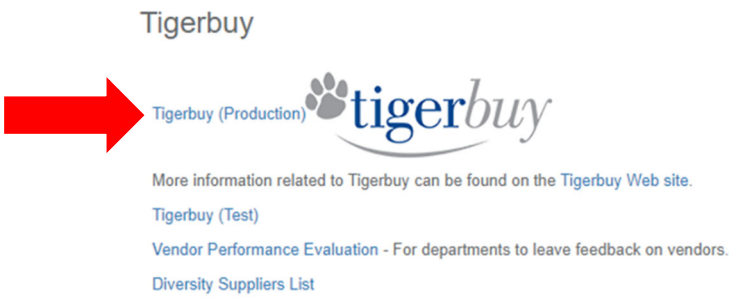
*If your Vendor is not in the Tigerbuy system, they will need to register. Please see the Procurement Vendor page https://www.memphis.edu/procurement/tigerbuy/vendor.php "Doing Business with UofM" for current links & Instructions.

How to - Tigerbuy Receipting

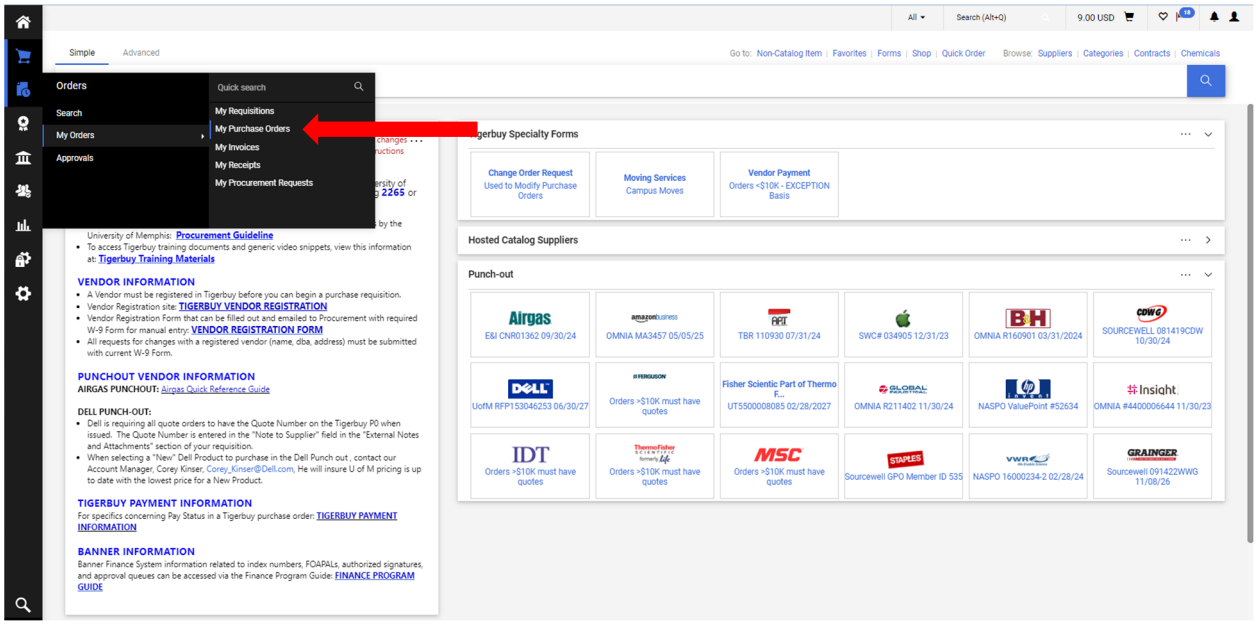
Log into My Memphis & go to the **Finance** tab:



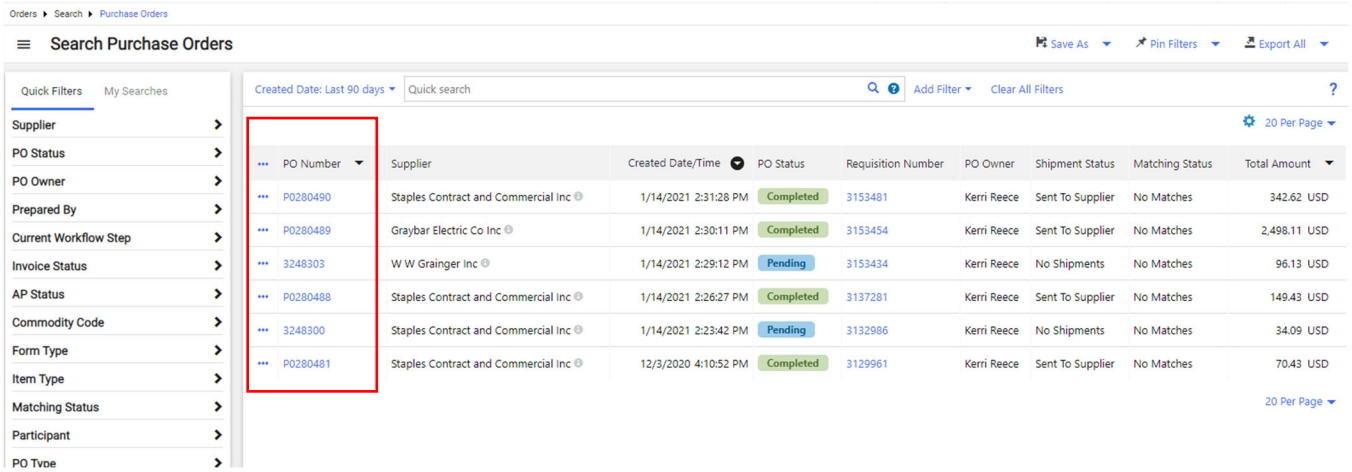
Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**



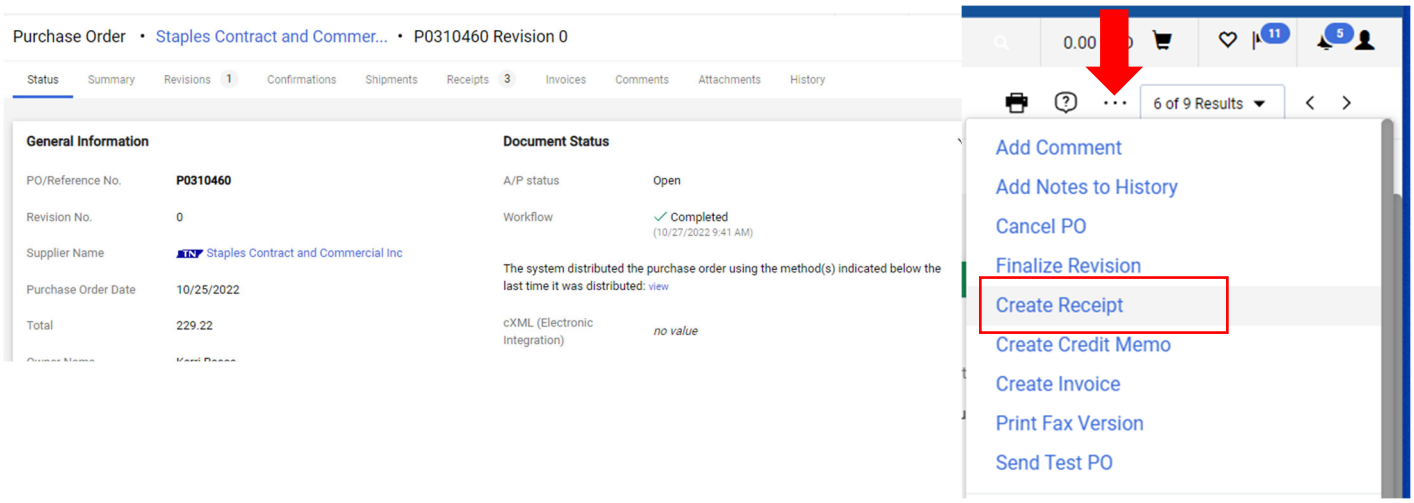
Tigerbuy opens on the Home screen. Click on **Orders / My Orders / My Purchase Orders** on the left menu.



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 P0 number you want to receipt.



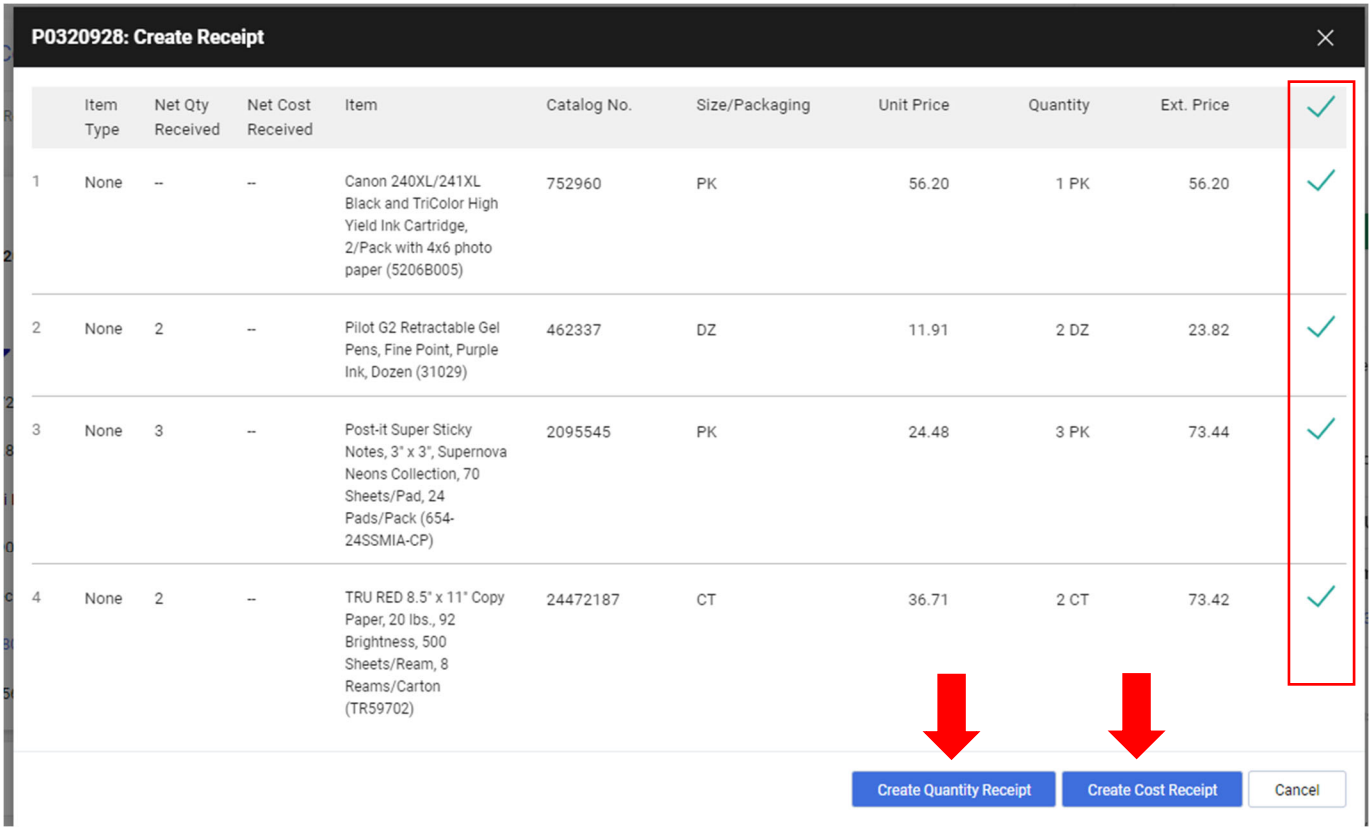
Your P0 opens. Click on the ellipses on the right and choose **Create Receipt**.



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.

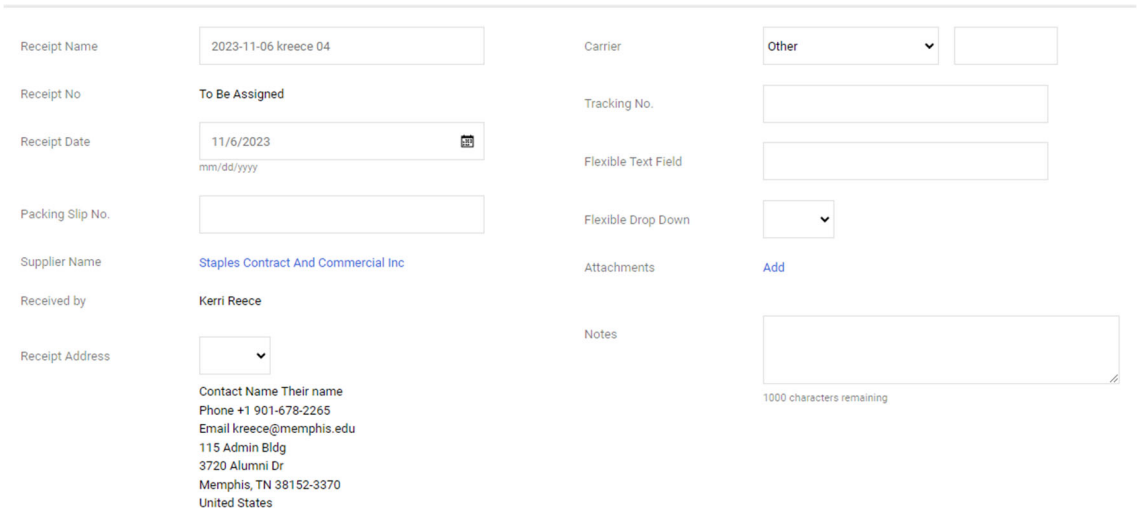
The screen contains a list of your PO line items. It defaults to all lines checked.

- 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.

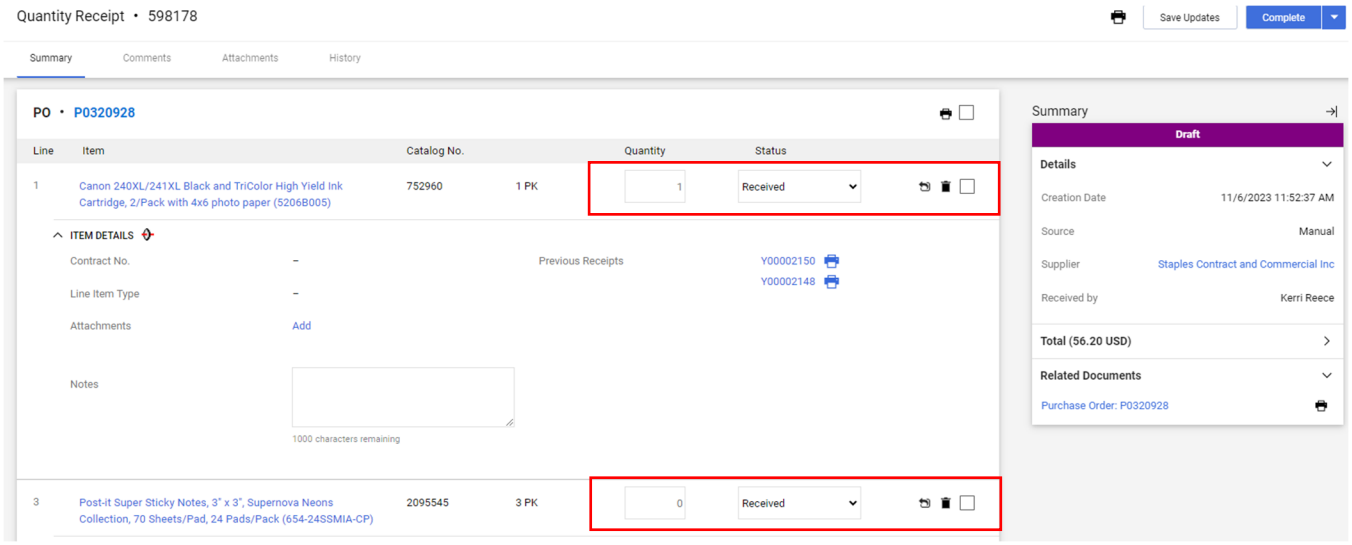


When you click to create the receipt type you need, your receipt will come up with only the lines that were checked.

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



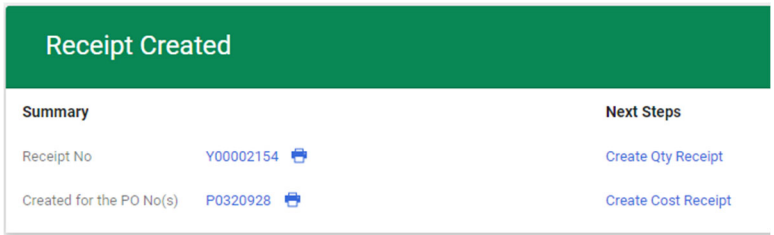
Scroll down to the Line Details. Enter the quantity of each item that you are receiving. The Line Status defaults to “Received”.



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)

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

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



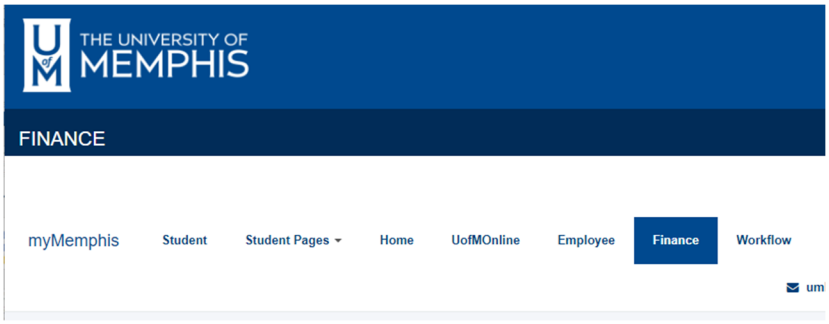
Now your P0 lines show which lines are received and if there are any returns. Accounting will not pay any invoice until the credit is received.

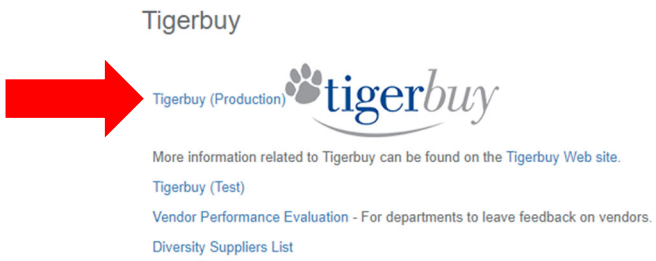
How to – Make a basic Staples return

Returns are always a three-part process:

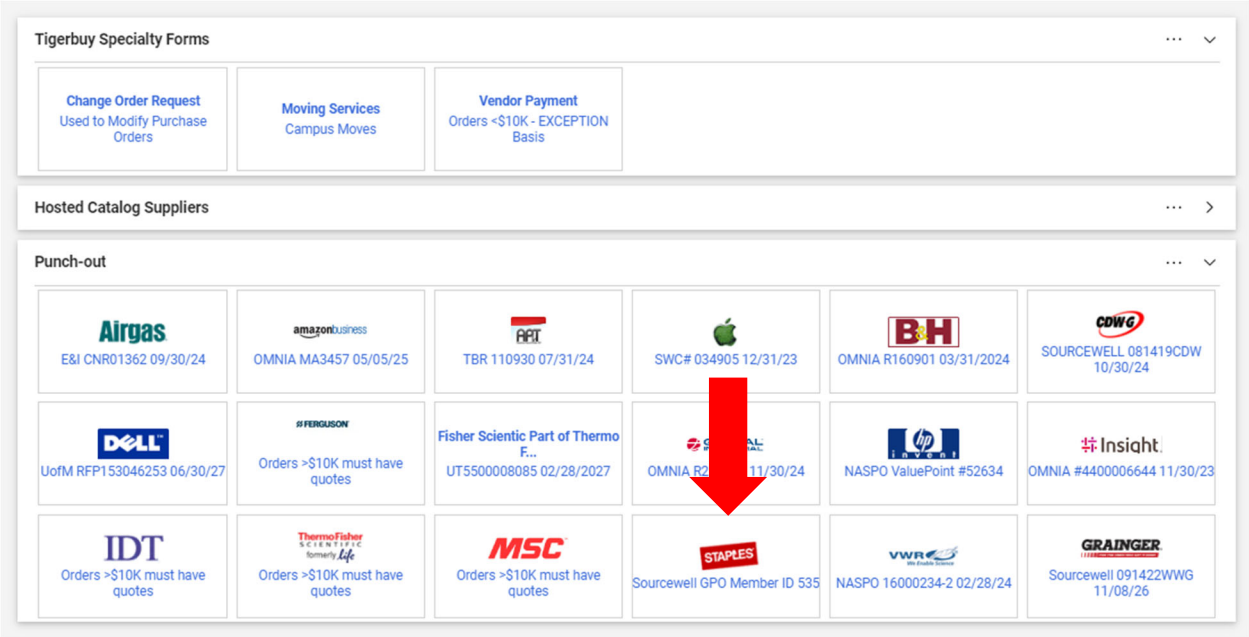
1. **Communicating** with the vendor to initiate the return process and get information on receiving credit.
2. **Internally processing** a return receipt in Tigerbuy, ensuring the invoice and credit are processed correctly.
3. **Physically returning** the item to the vendor if required.

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

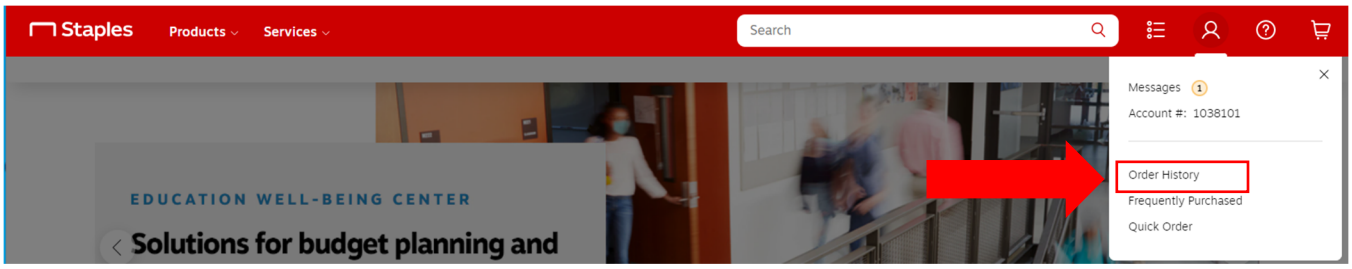




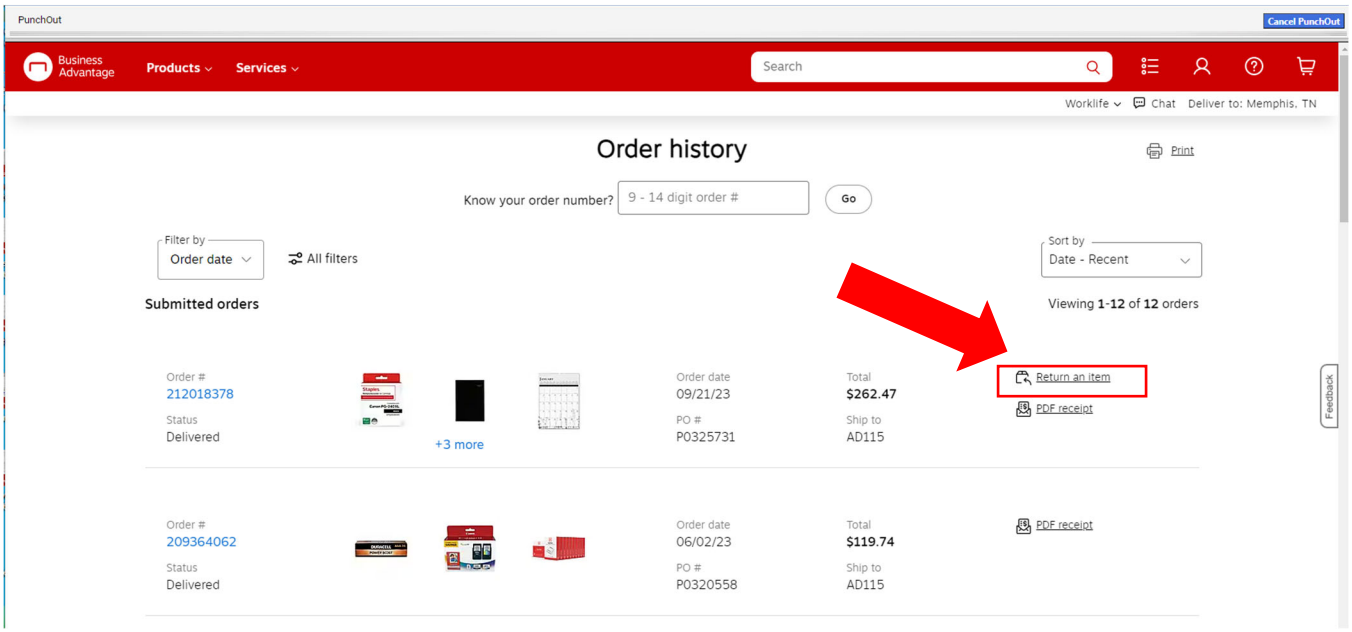
This will bring you to the shopping home page. Click on the Staples Punch Out Catalog button.



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.

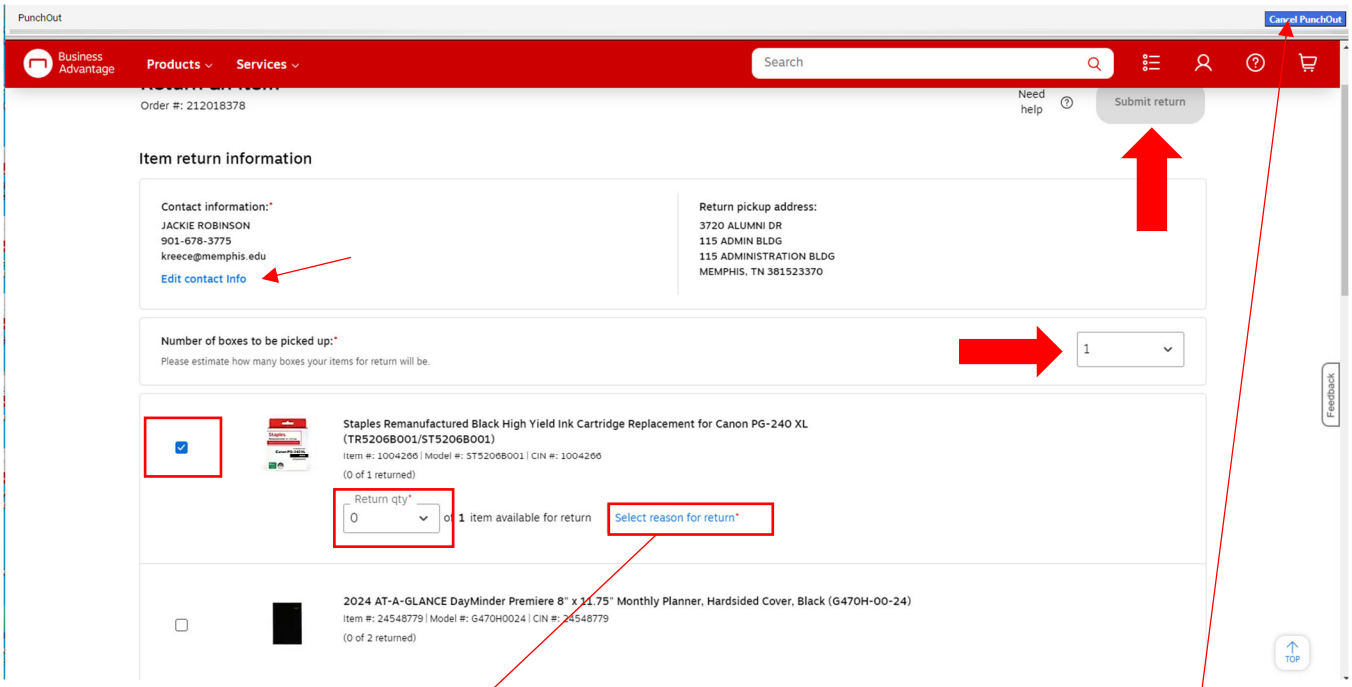


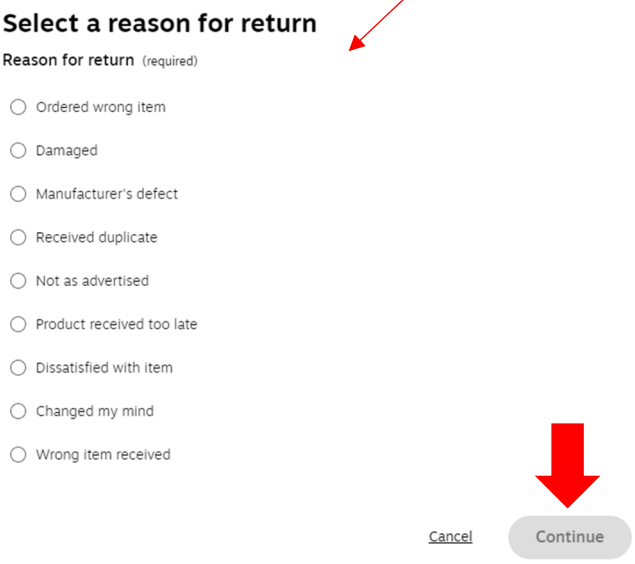
The top portion of the screen contains your information. Make sure your contact information is correct, especially your email. You can edit this if needed using the **Edit** link.

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.

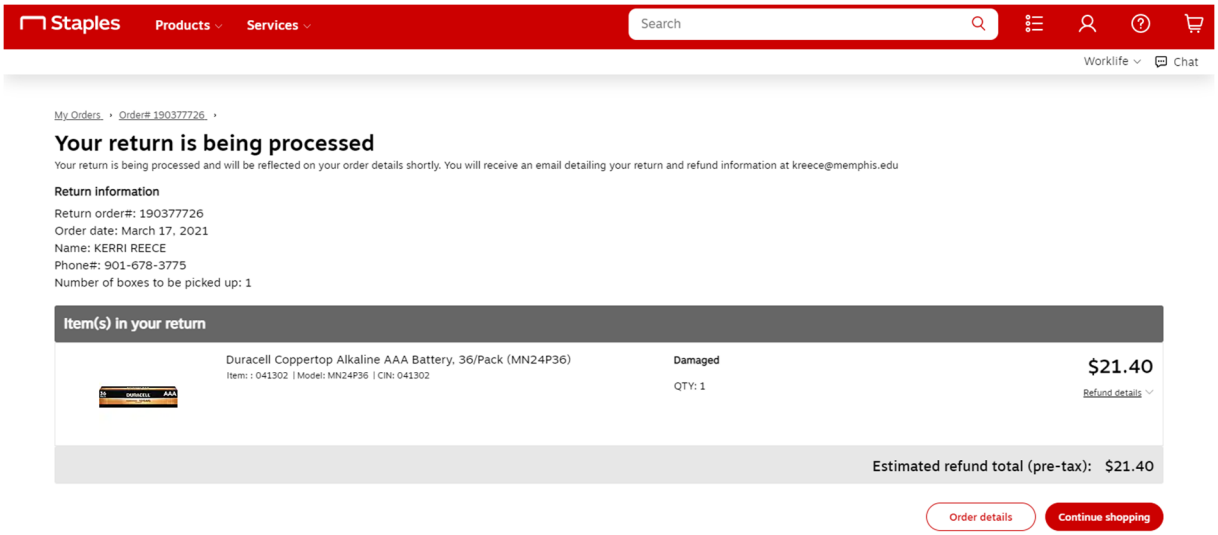
Click **Submit Return** when you are finished with the lines.



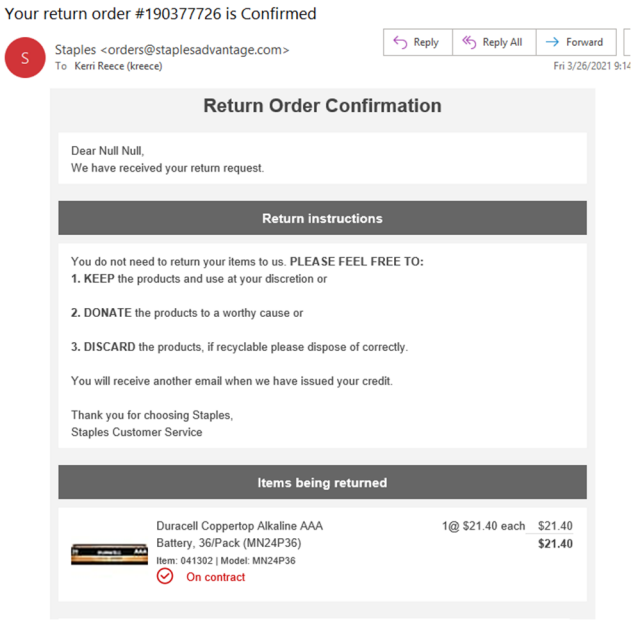


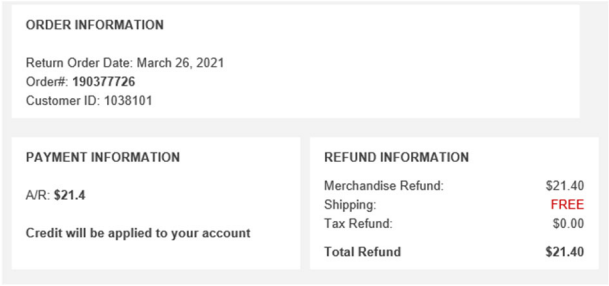
If at any time you'd like to Exit without saving anything, use the blue **Cancel Punchout** button in the top right corner.

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



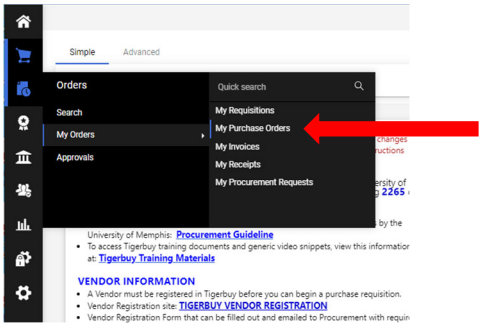
You will then receive a Return Order Confirmation email. This will contain your return instructions and refund information. You may be directed to return the item or dispose of it.



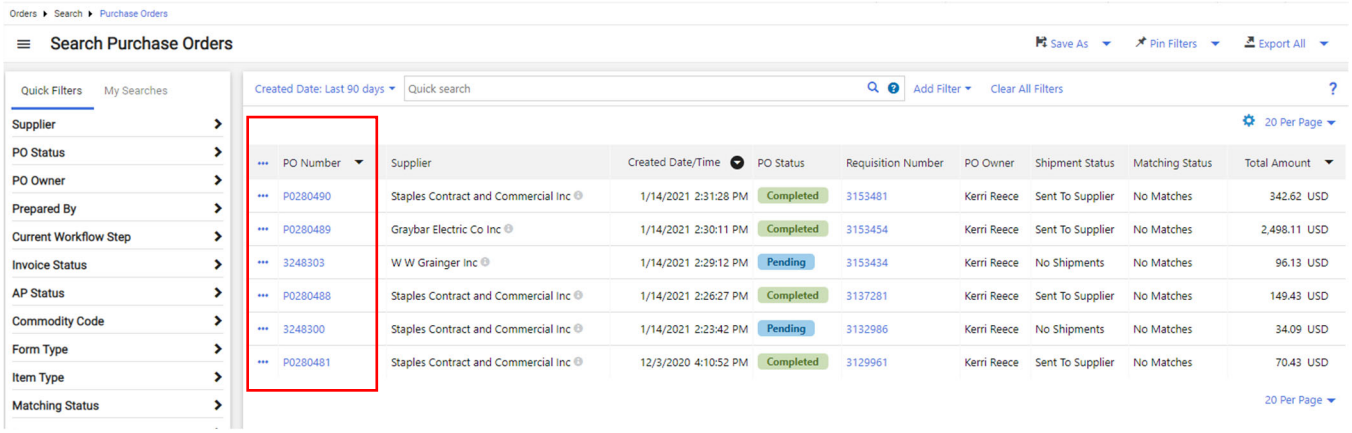


Now you need to Process the return Receipt in Tigerbuy

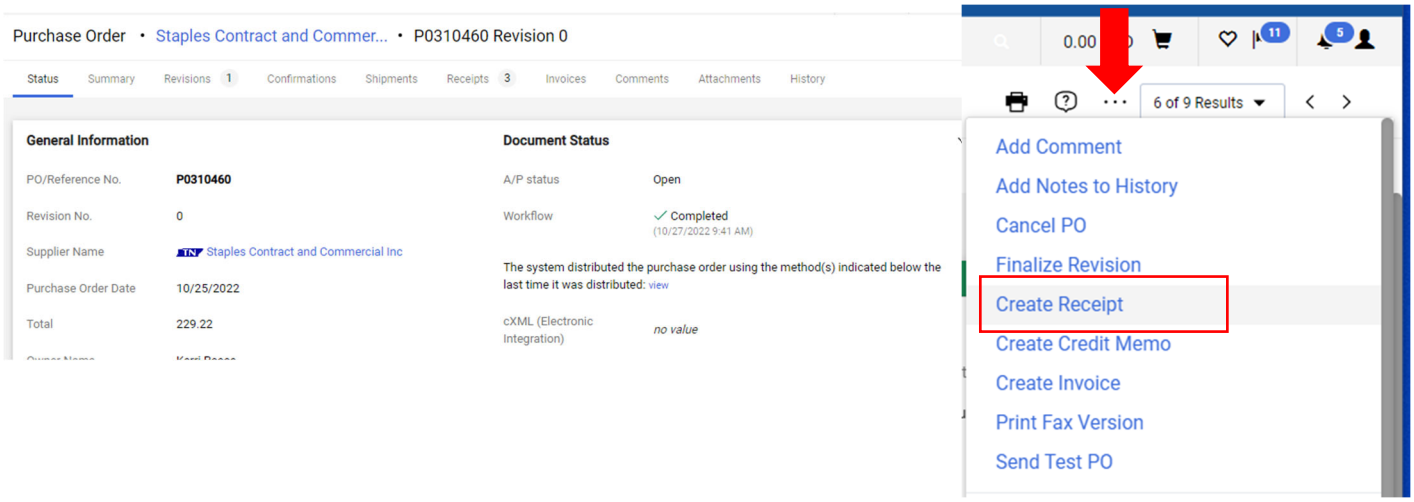
Click on **Orders / My Orders / My Purchase Orders** on the left menu.



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 P0 number you want to return receipt.



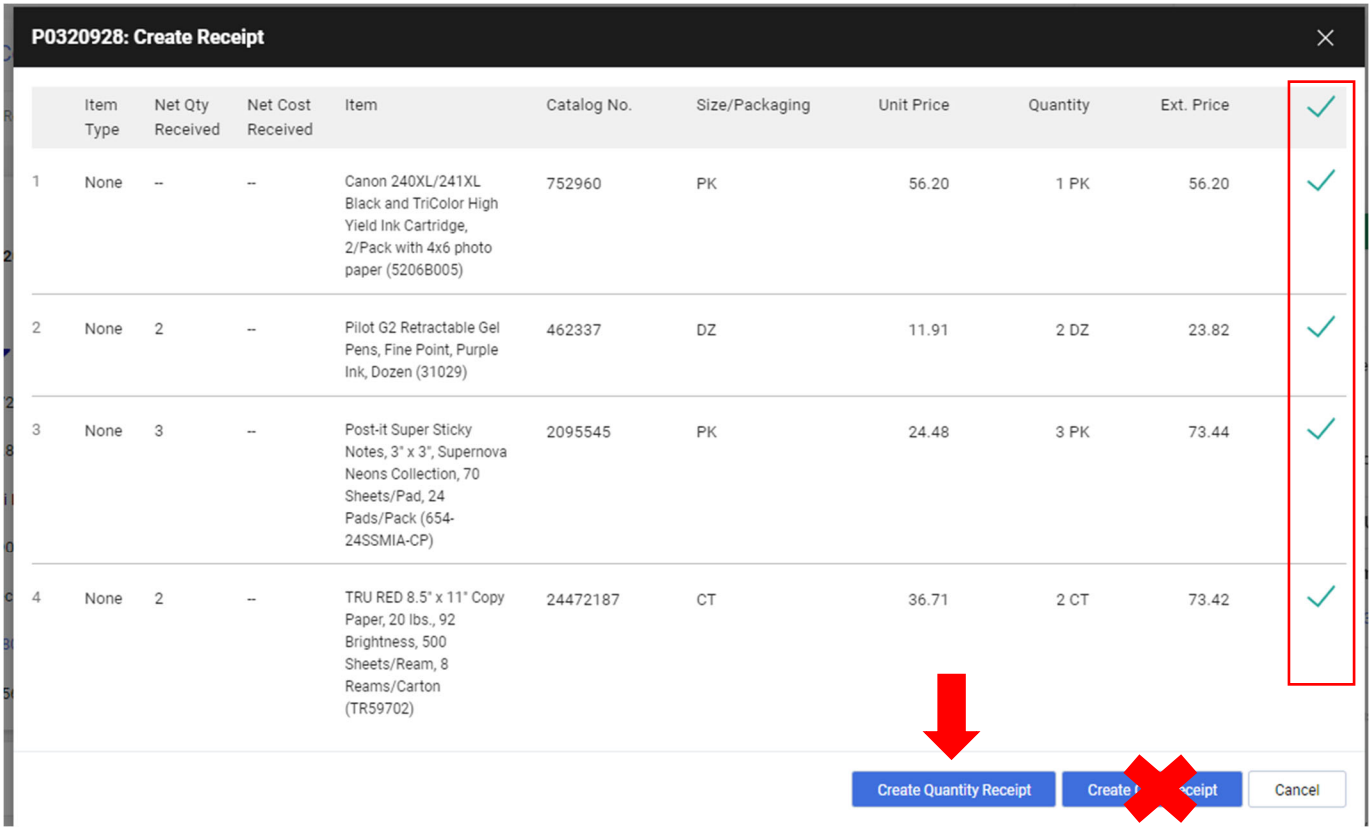
Your P0 opens. Click on the ellipses on the right and choose **Create Receipt**.



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

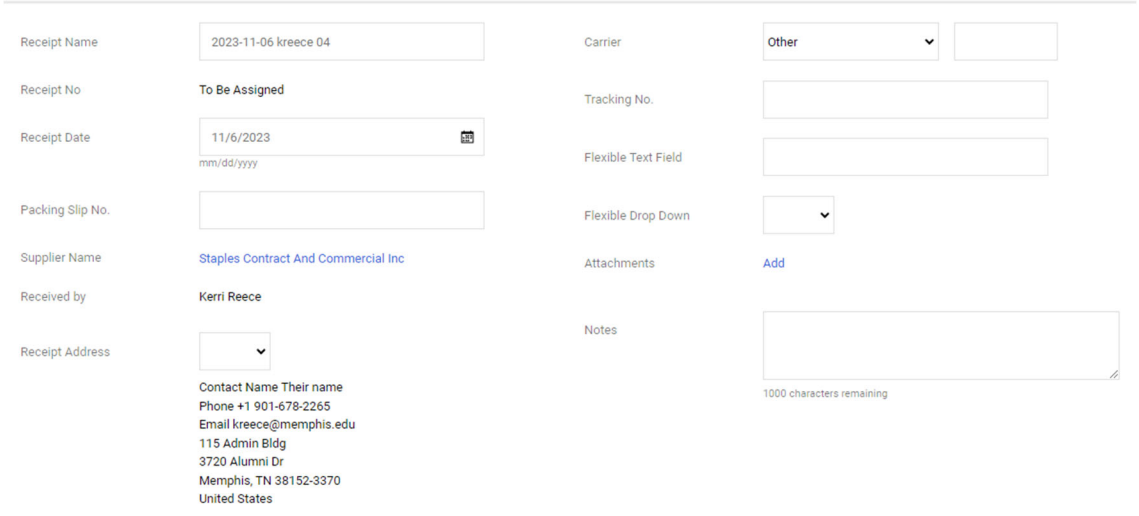
The screen contains a list of your PO line items. It defaults to all lines checked.

- 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**.



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.

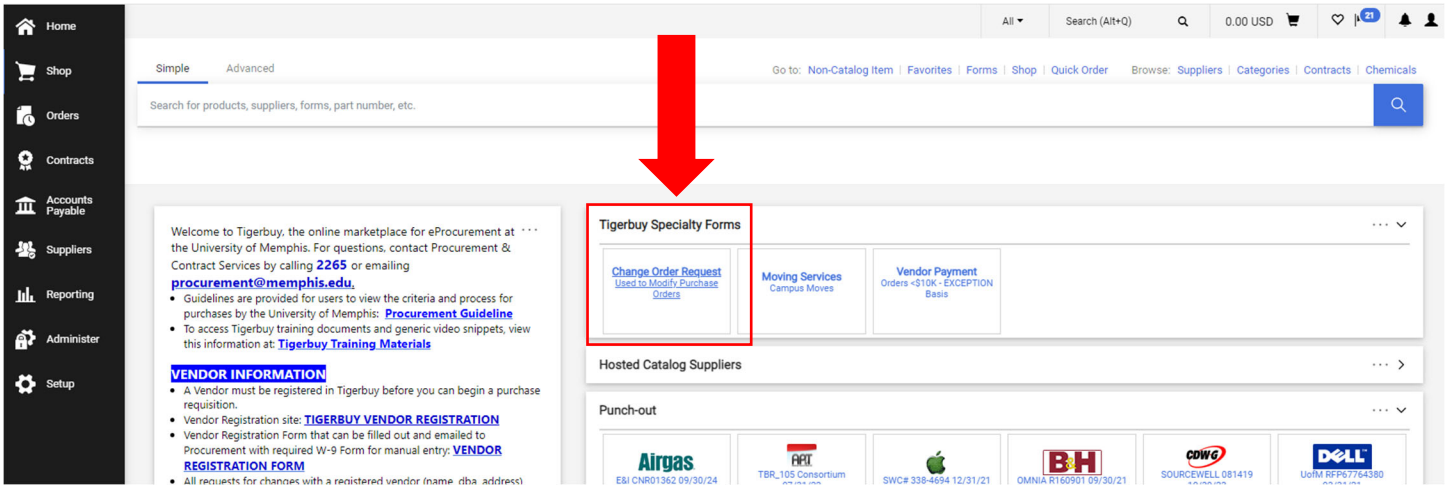


How to - Create a Change Order Request

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:

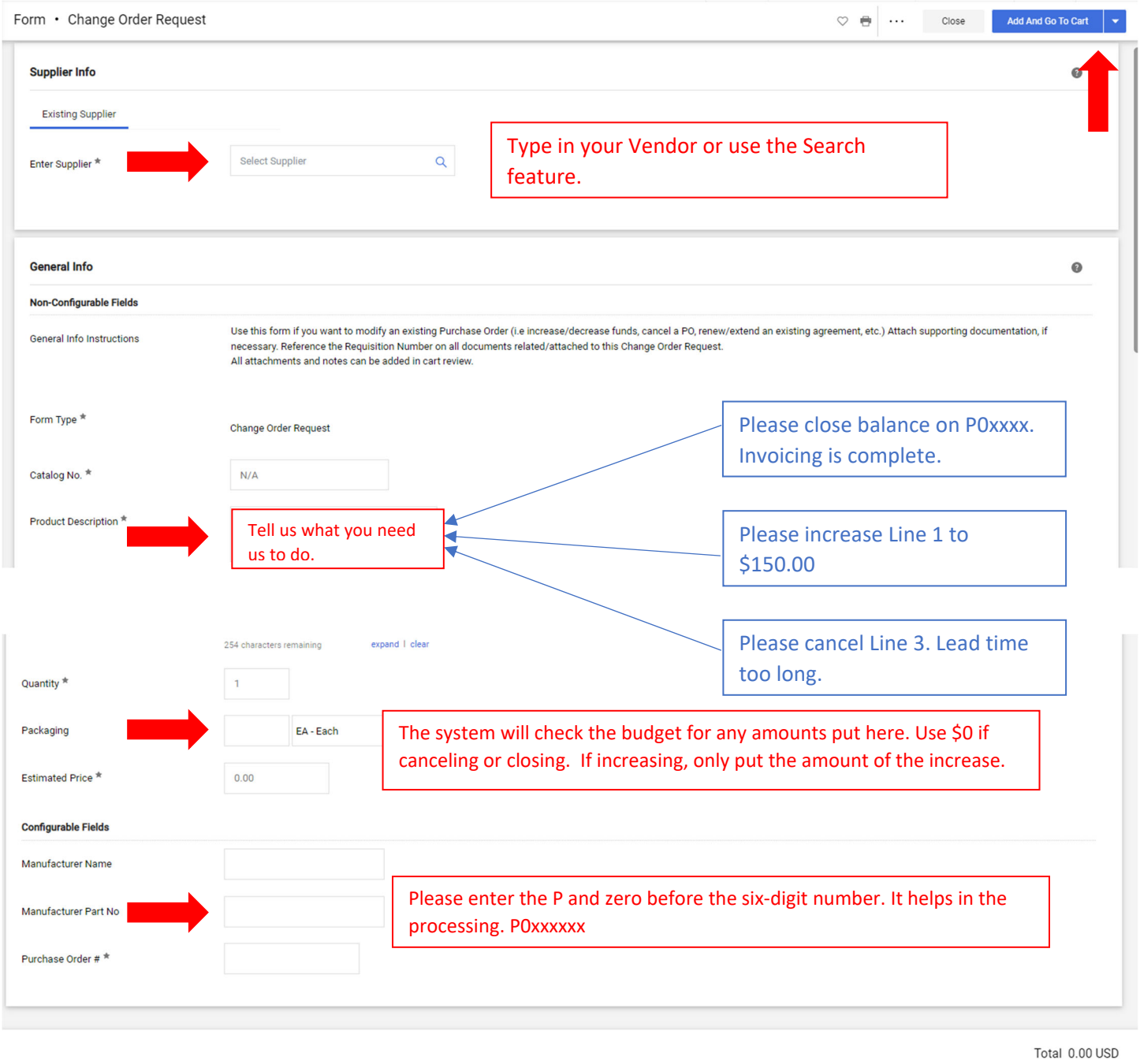
- Do a transfer voucher through accounting after the Tigerbuy purchase has been received and paid to correct the budget issue.
- The P0 with incorrect information can be cancelled with a change order and a new P0 issued with correct information through a new requisition. If this is done, it is highly recommended you communicate with the Vendor that the P0 cancel / reissue is coming.

Purchase order with incorrect vendor

A Vendor cannot be revised on a Purchase Order that has been issued. A P0 is a legal UOM document sent to the Vendor. Incorrect Vendor P0 must be cancelled with a change order and a new P0 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.



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.

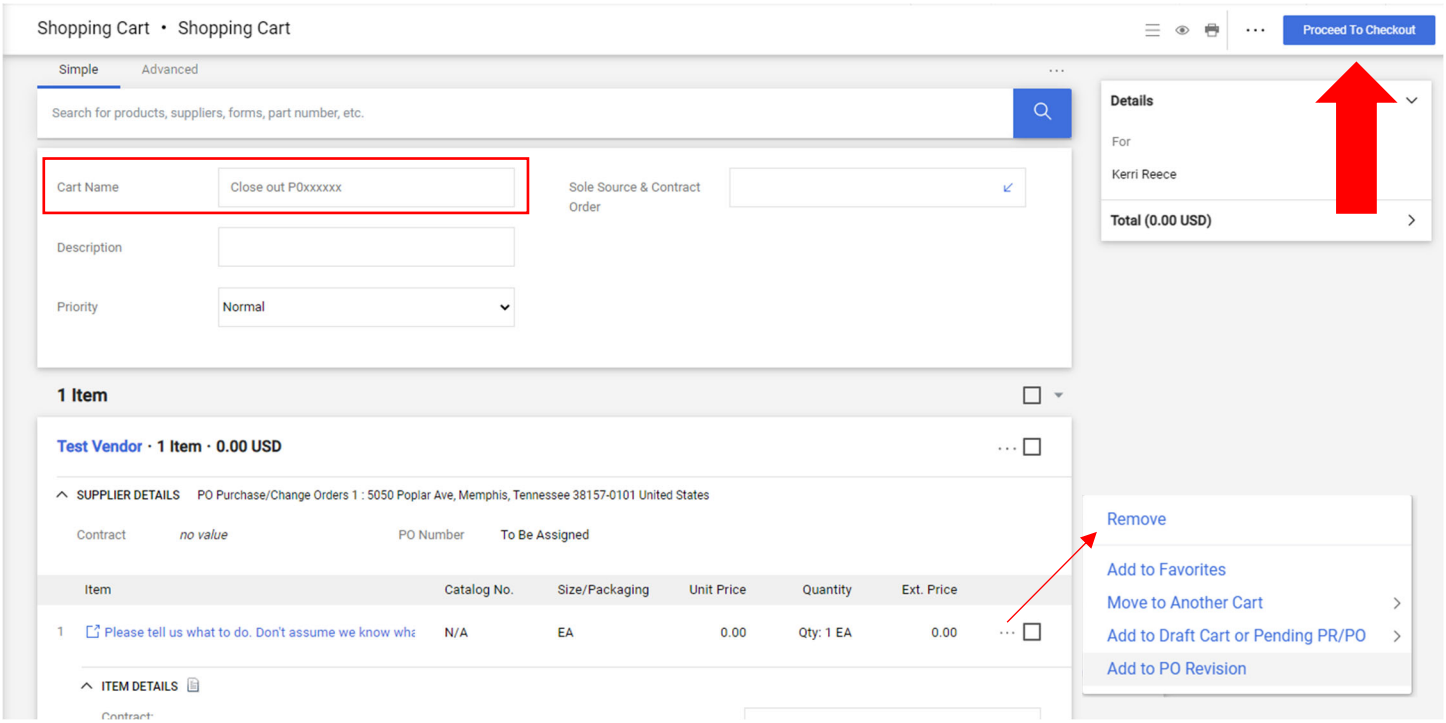
When you are ready click Add & Go to Cart to send this item to your cart and go work with it. If you need to add multiple lines, use the pulldown to see other options, such as Add to Cart and then use Add & Go to Cart on your last line. It will be possible to add more lines from the cart as well.

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.

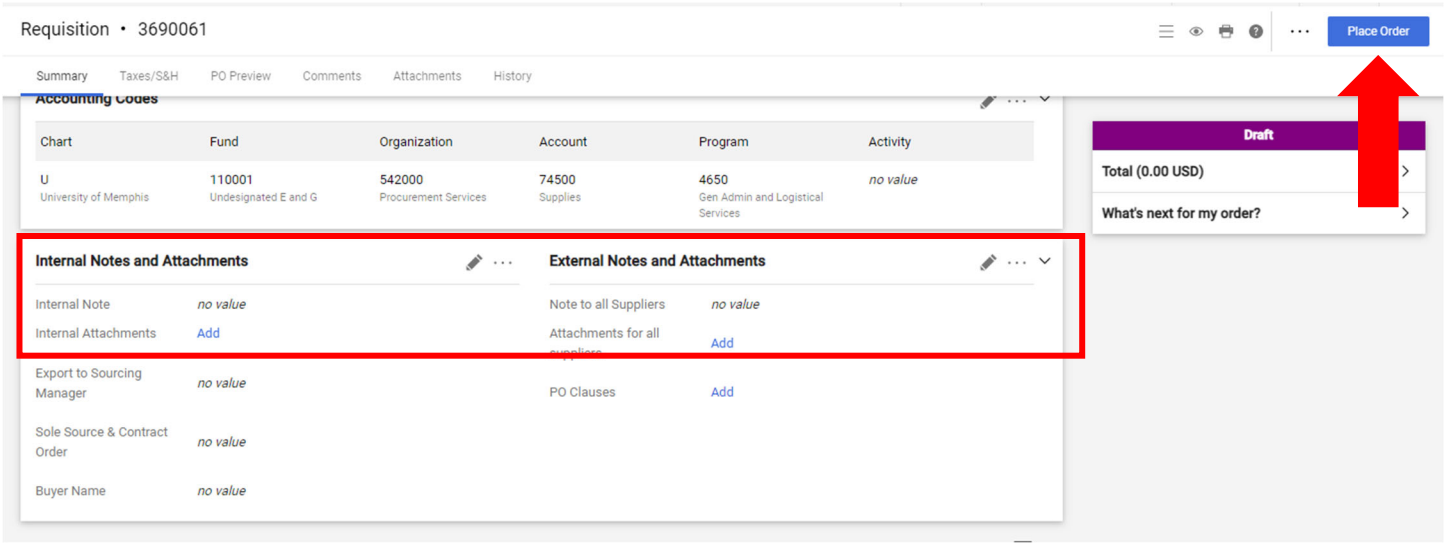
If you need to change the Item description, click on the text and the form will open back up for editing. Make your change and then save it and close to come back to the cart. (the text cuts off in the cart to save space)

Please name your cart. This helps us sort change orders when processing and speeds up the process. Generally, "Close / Cancel / Increase / Decrease" and the P0 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.

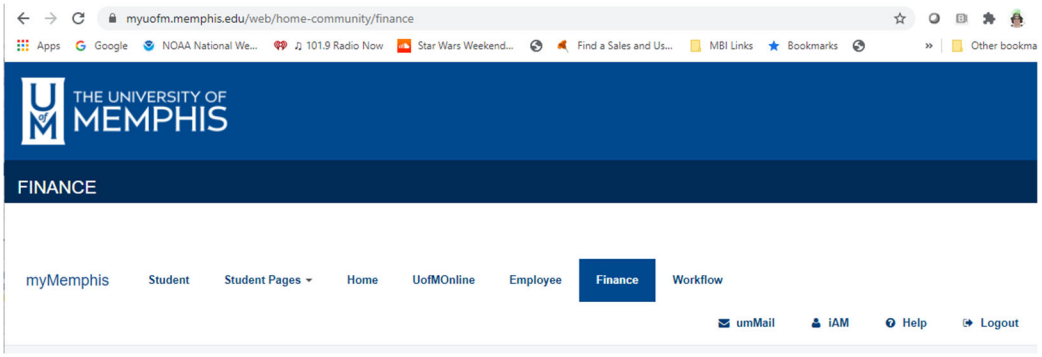


Attachments can be added to the Requisition if needed. Procurement will add the attachments to the purchase order if needed. If your change order request is ready, click the **Place Order** button to submit it.

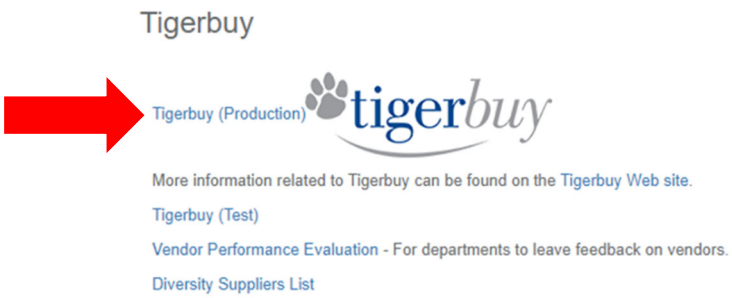


How to - Tigerbuy Reporting

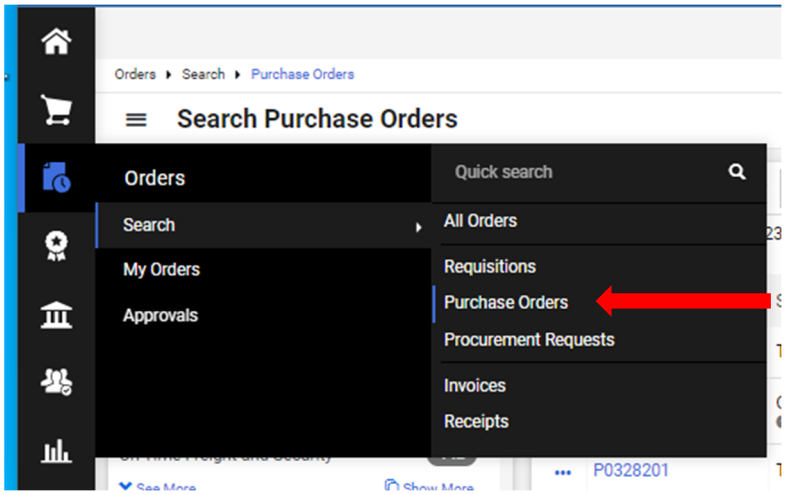
Log into My Memphis & go to the **Finance** tab:



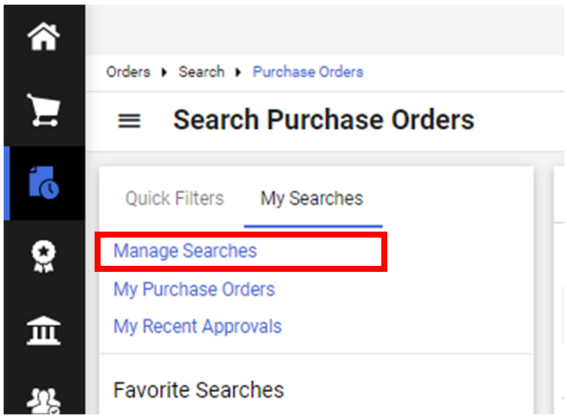
Scroll down on the right-hand side to Tigerbuy and click on **Tigerbuy (Production)**

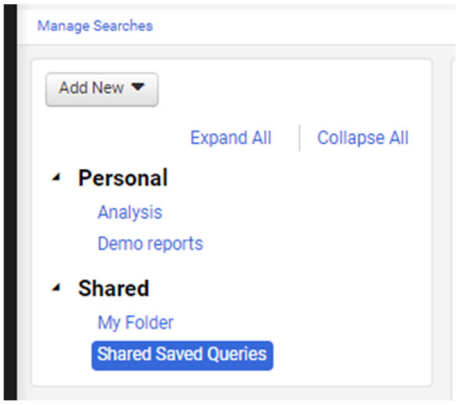


Tigerbuy opens on the Home screen. Click on **Orders Search / Purchase Orders** on the left menu.

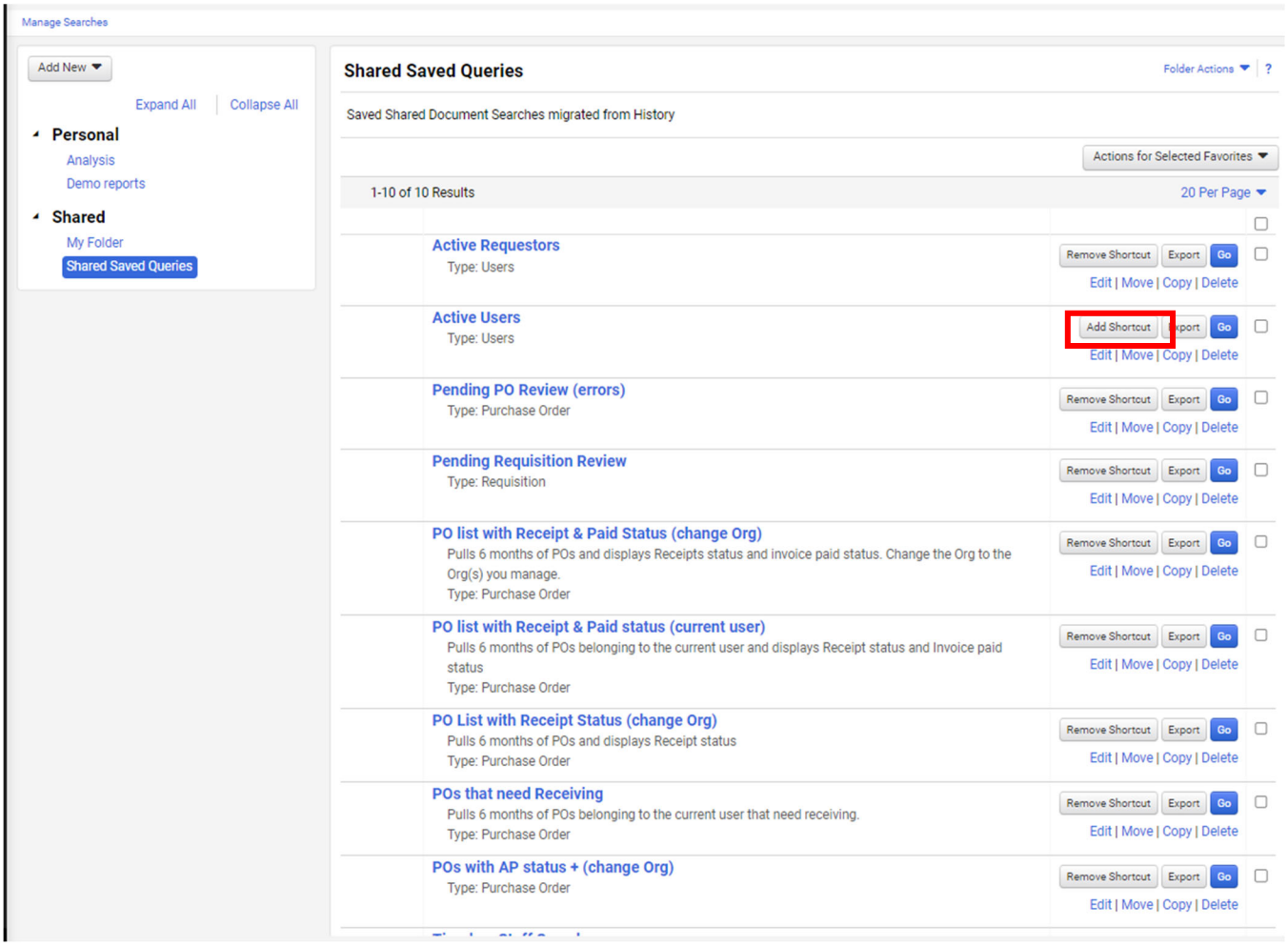


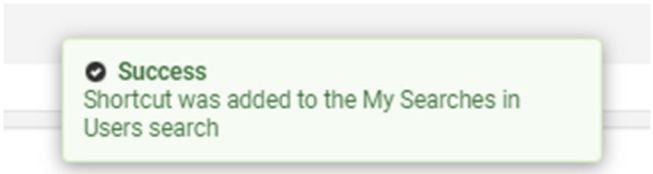
Click on **My Searches** on the left side of the screen. Click on **Manage Searches**. Click on **Shared Saved Queries**.



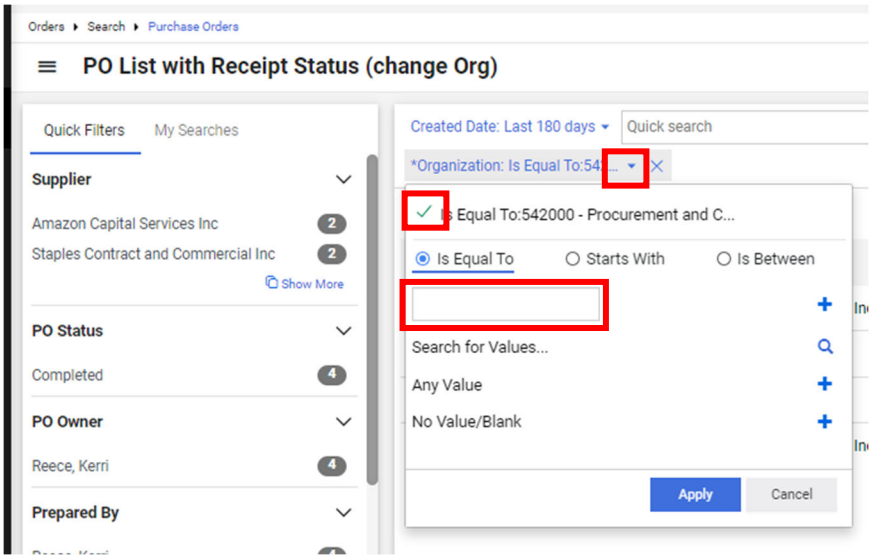


You should see several shared reports that you can start with. Some need you to choose your organization and some default to the current user. The information in the parentheses tells you which one the report is. Click the Add Shortcut button on any reports you want to add to your saved folder.



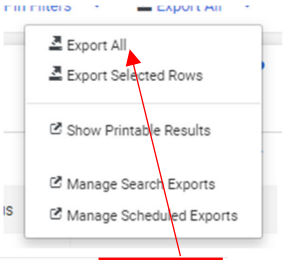


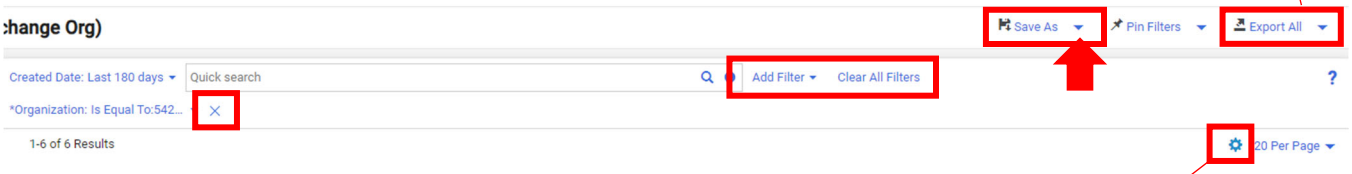
Once you have the report shortcuts pulled into your searches, you can run them by clicking on them. To make changes to the filters in place, use the pulldown arrow and make changes. To change the Org, uncheck the one at the top, type in the Org you need, and click **Apply**.

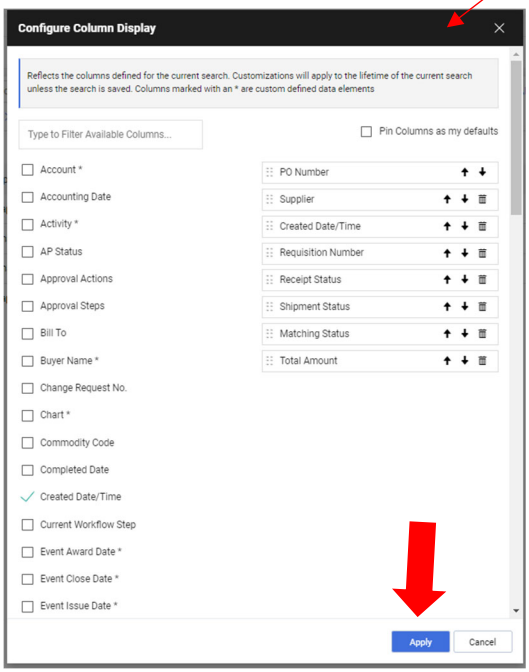


You can then change the filters and columns as needed using the pulldown menus.

- 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

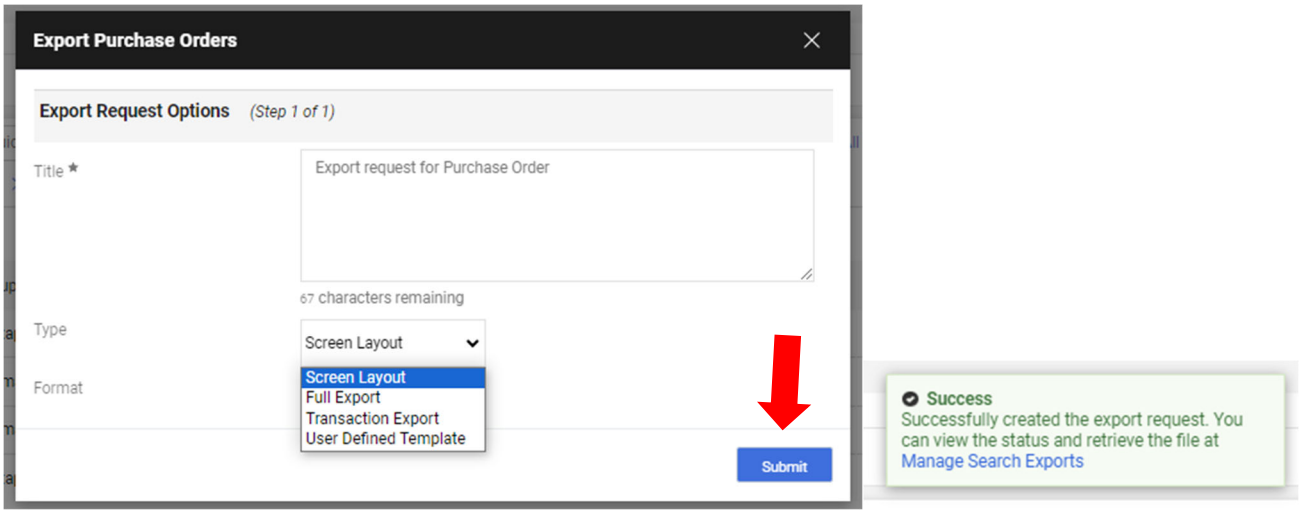




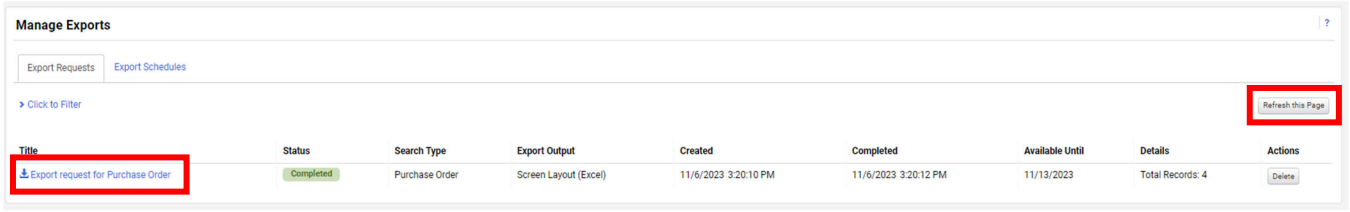


The check boxes allow you to add or remove columns from the list on the left. The selected columns are listed on the right. They can be rearranged by grabbing them and dragging and dropping them or using the arrows. Click **Apply** to save your changes.

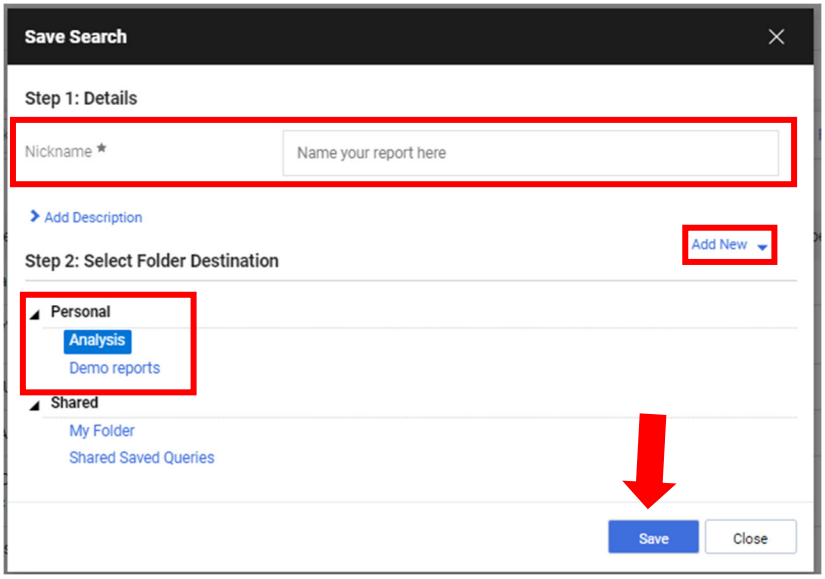
When exporting, you will need to name your report in the Title space, then choose the type. **Screen Layout** gives you the PO header information that you see on the screen. **Transaction Export** will give you all line items on the PO. Click **Submit**.



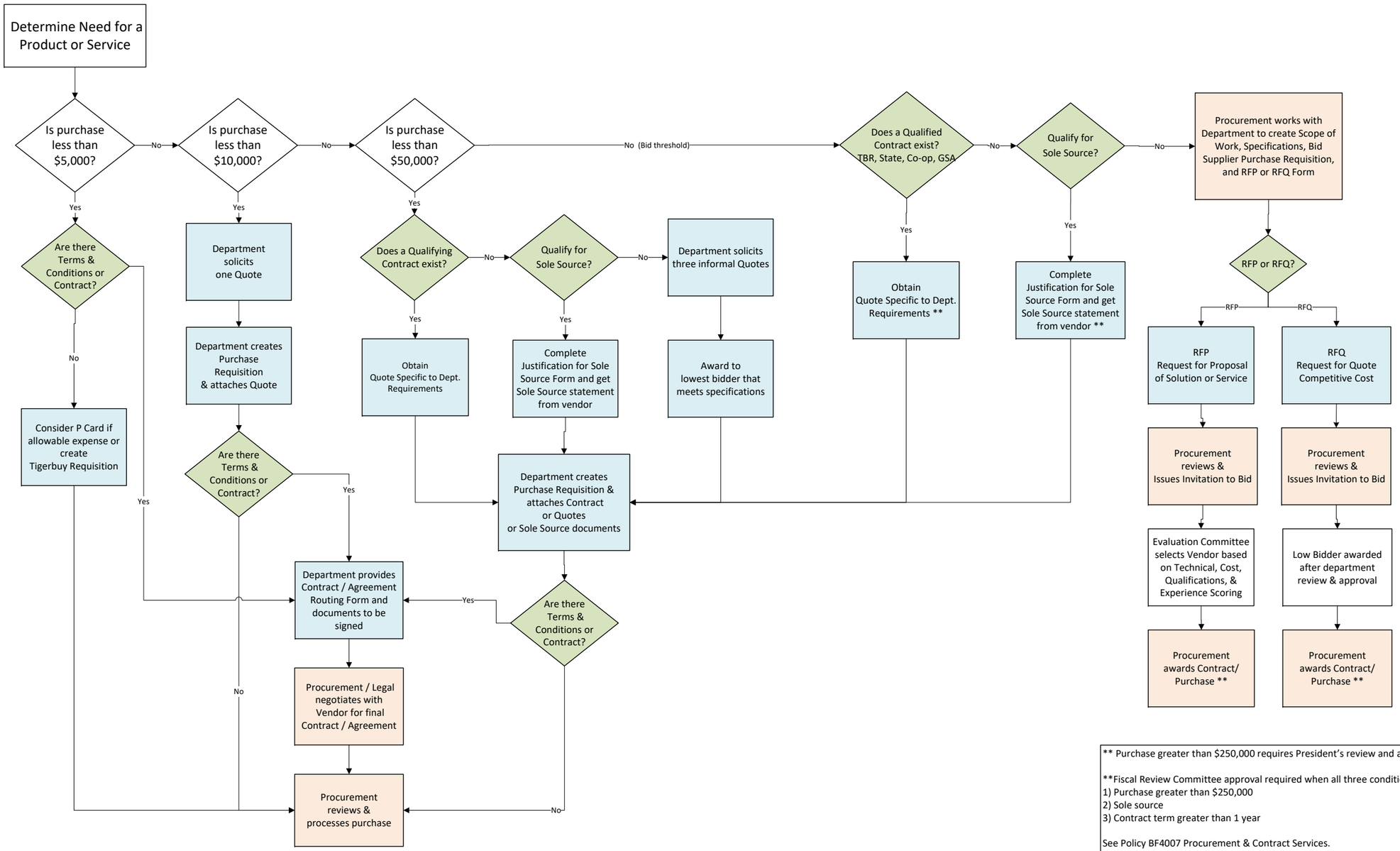
You will get a Success message with a link to your report. When it is completed, you will see the title of your report as a clickable download link. You may have to refresh the screen a few times depending on the size of your report.



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**.



Purchase decision tree



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

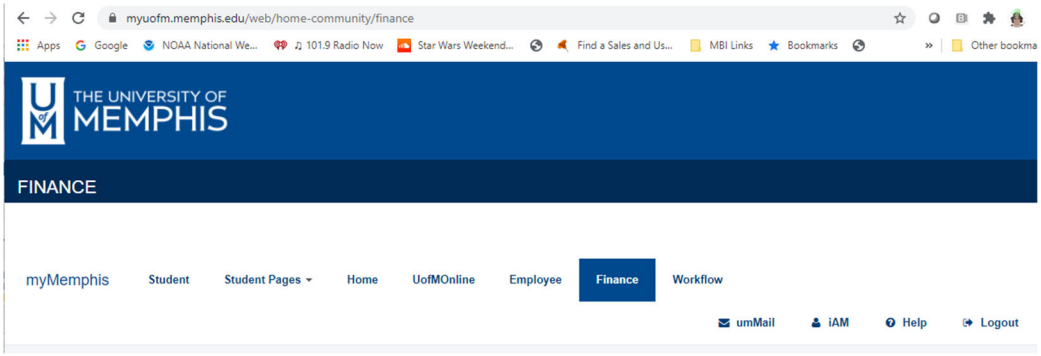
**Fiscal Review Committee approval required when all three conditions are met:
1) Purchase greater than $250,000
2) Sole source
3) Contract term greater than 1 year

See Policy BF4007 Procurement & Contract Services.

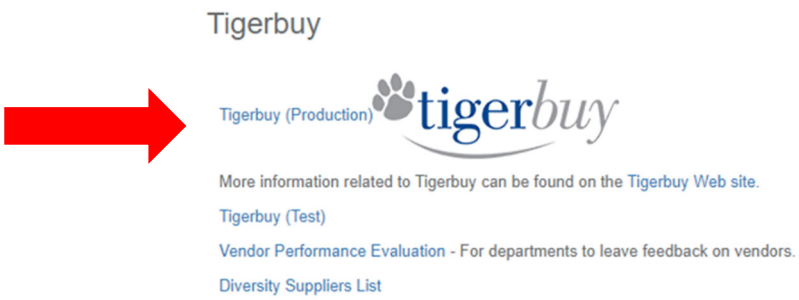
How to - Tigerbuy Profile Setup

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

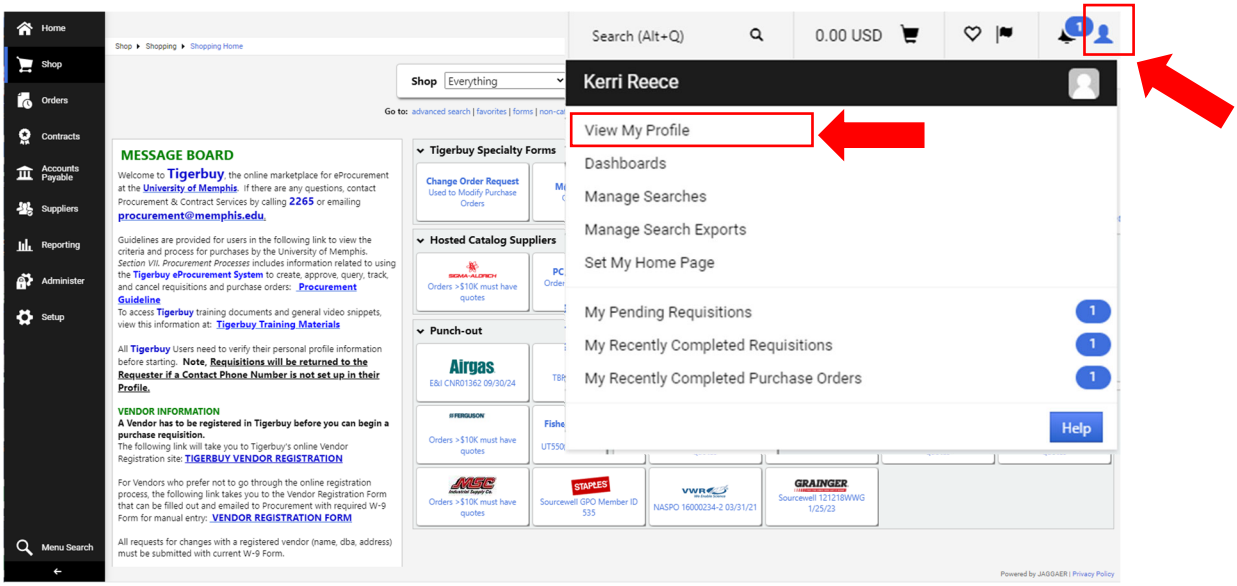
Log into My Memphis & go to the **Finance** tab:



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

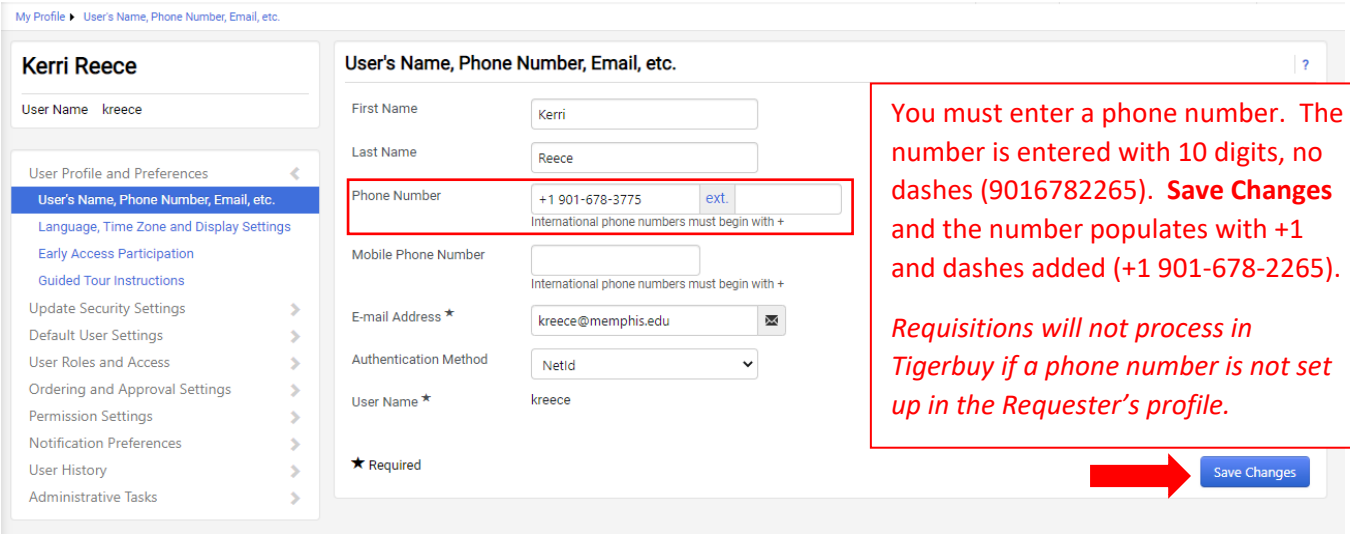


Tigerbuy opens on the Home screen. Click on the Person icon and choose **View My Profile**



Screen opens on User Profile and Preferences

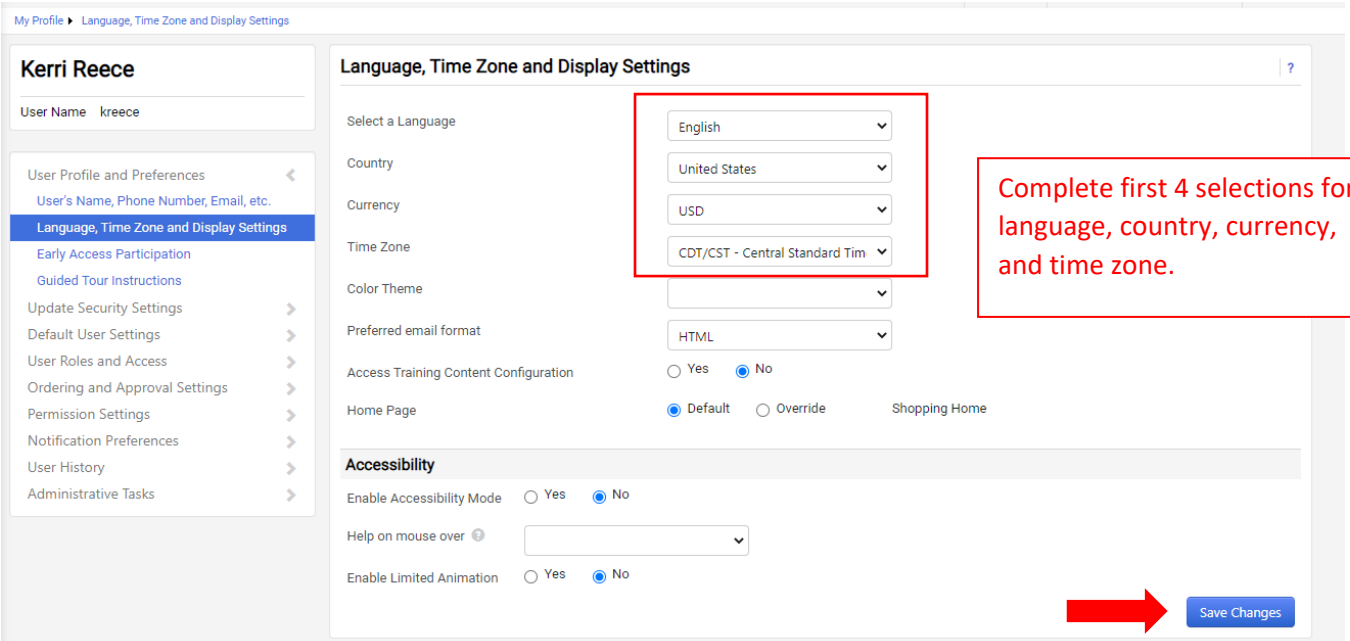
User's Name, Phone Number, Email, etc. (Required):



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):

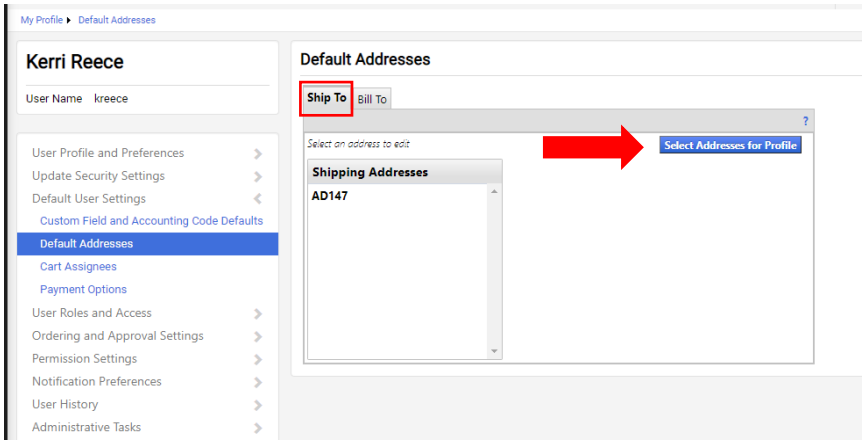


Complete first 4 selections for language, country, currency, and time zone.

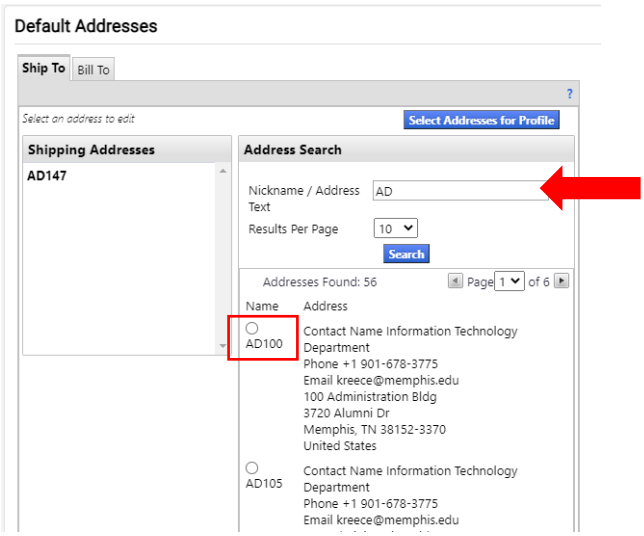
Default User Settings / Default Addresses (Required)

Shipping Addresses are official UOM buildings.

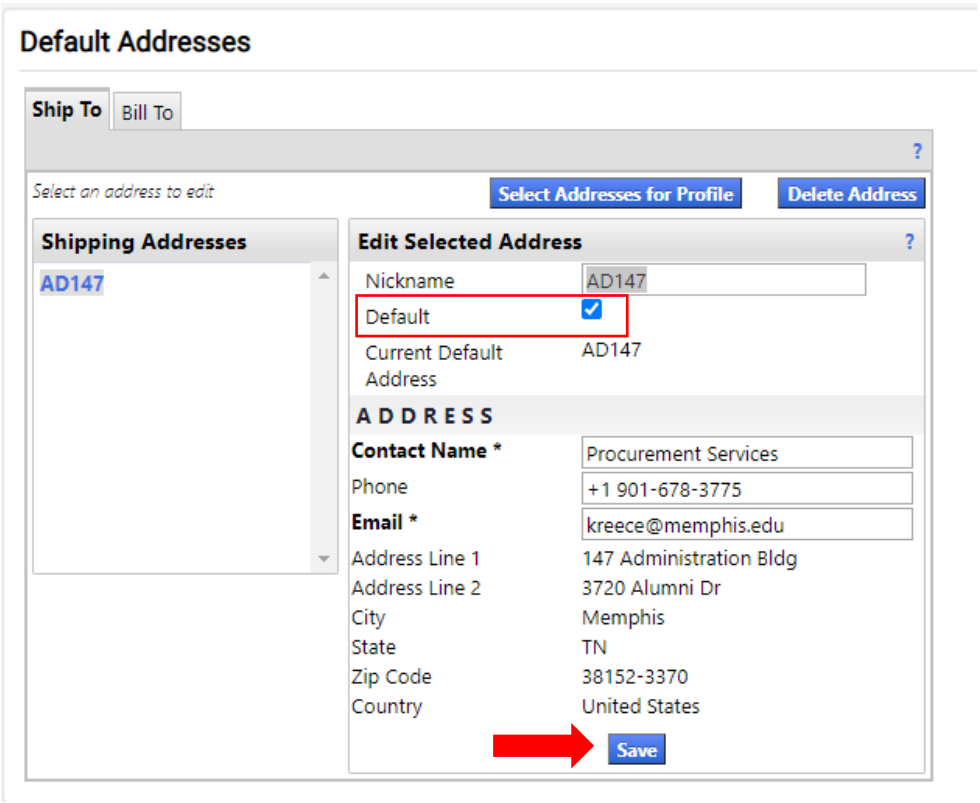
Ship To Tab - Click **Select Addresses for Profile**.



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.

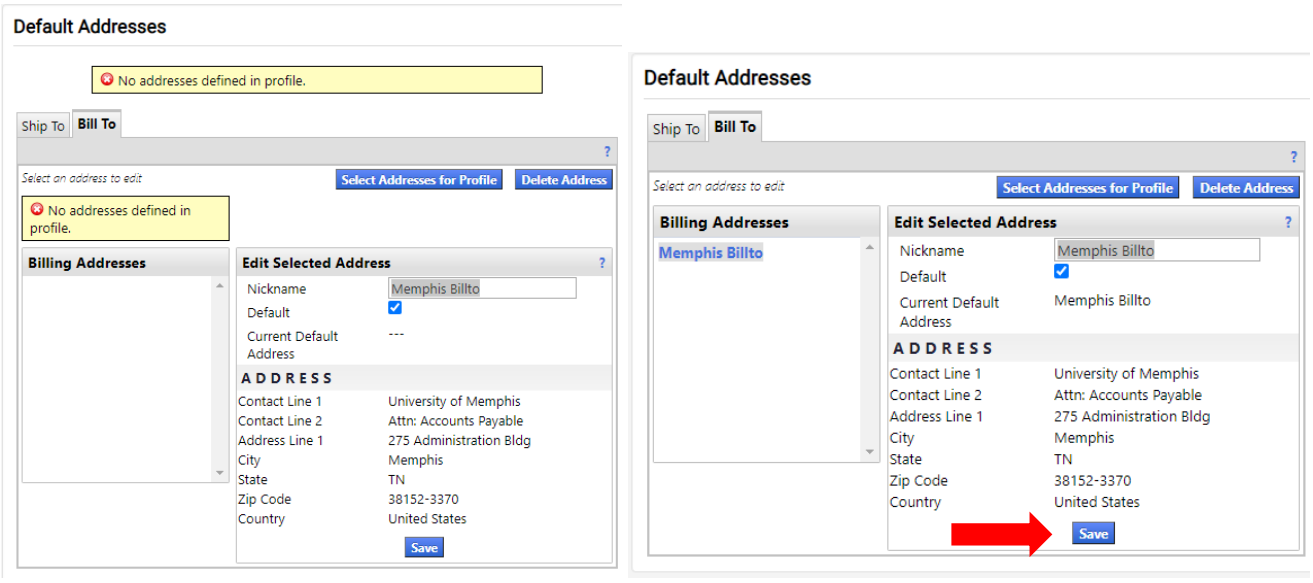


The shipping address (as it will appear when you create requisitions) will populate this area. Select **Default** box and **Save**. Your address will move to your profile box on left. Addresses are 2 lines: Line 1-Building and Room Number; Line 2-Street Address. If you do not find your room number, contact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



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.

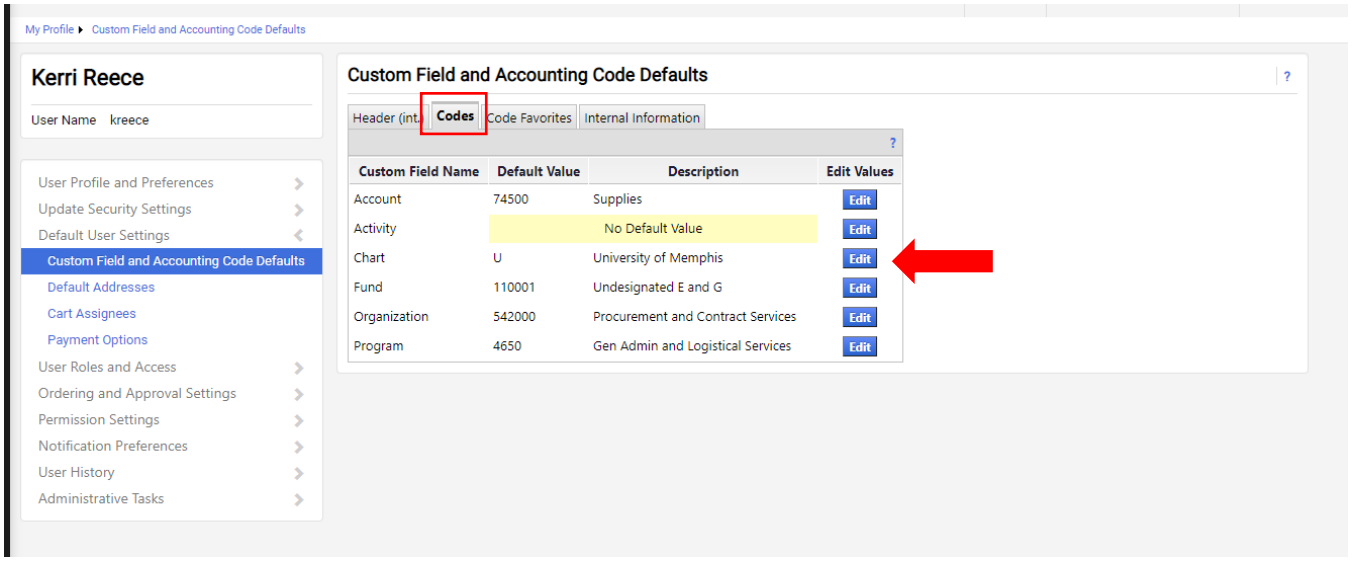


Default User Settings / Custom Field and Accounting Code Defaults (Required):

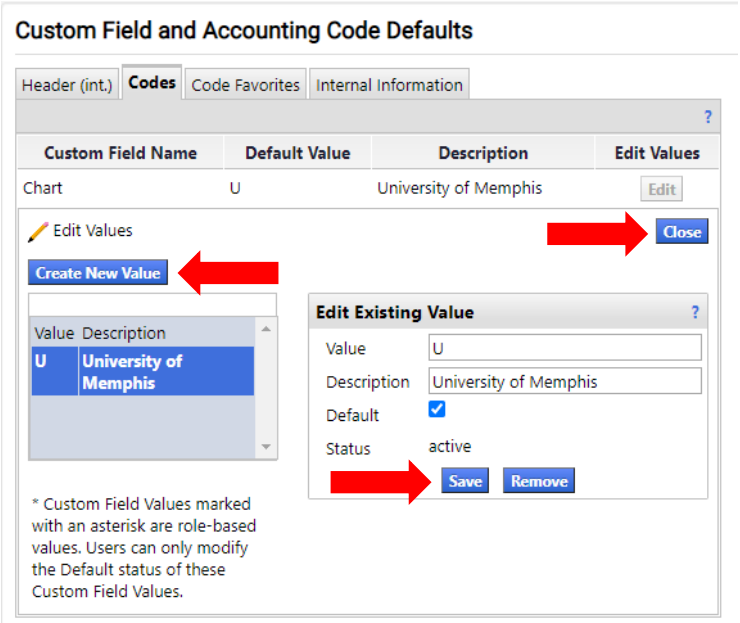
By setting up defaults, your requisition documents will populate with the required accounting information needed for a purchase. Please note Index numbers cannot be used in Tigerbuy. The Accounting Codes or FOAP for an Index number must be entered in the Tigerbuy requisition.

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.



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.

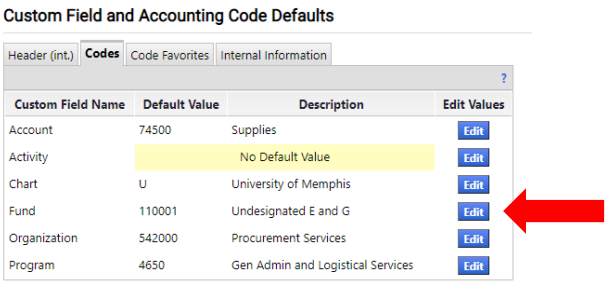


Click **Edit** then **Create New Value.**

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.

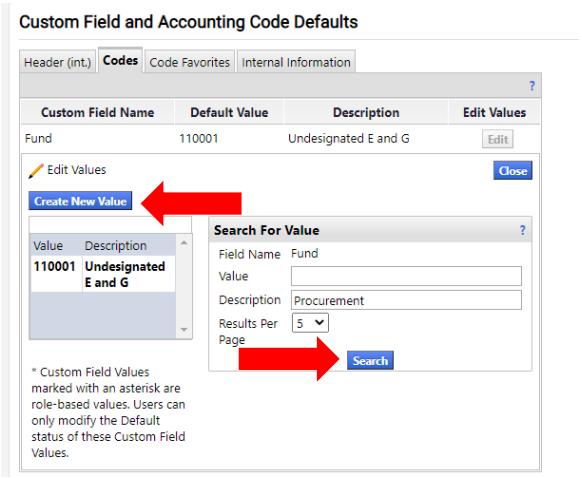
Click **Close** to go back to the Codes screen.

Fund is the next selection.



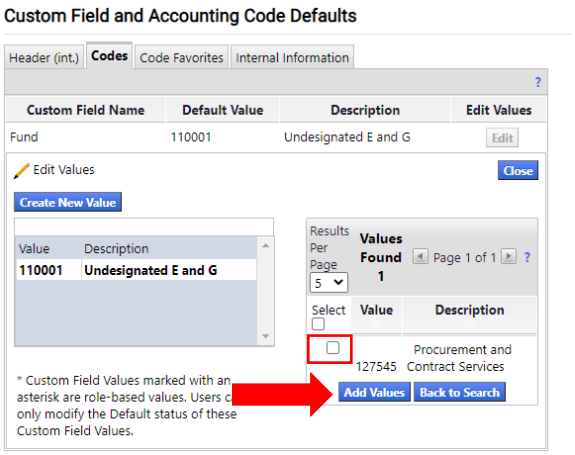
Click **Edit** then **Create New Value**.

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



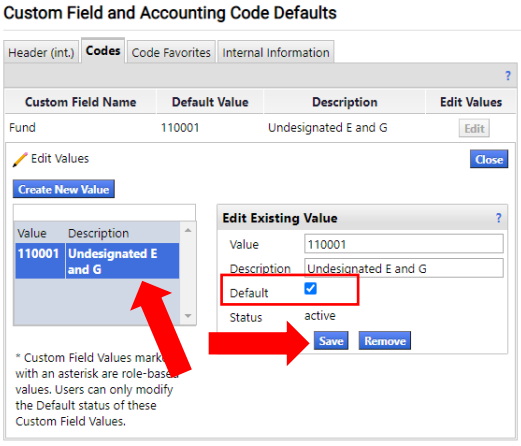
Click **Edit** then **Create New Value**.

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



Code information populates box.

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



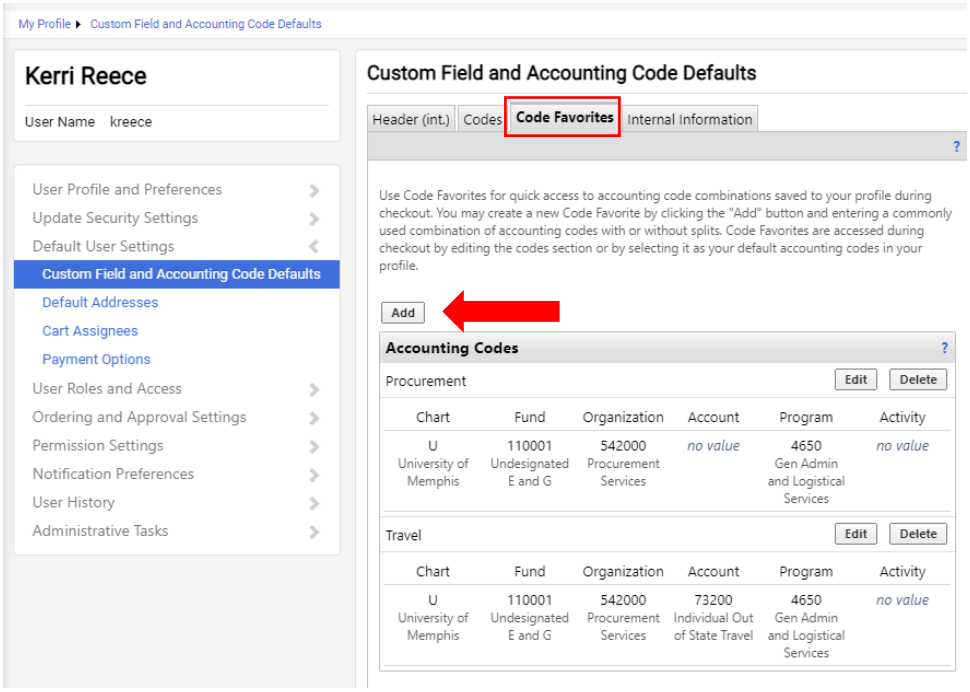
Click on the selected fund value to edit it, select **Default** and **Save**.

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

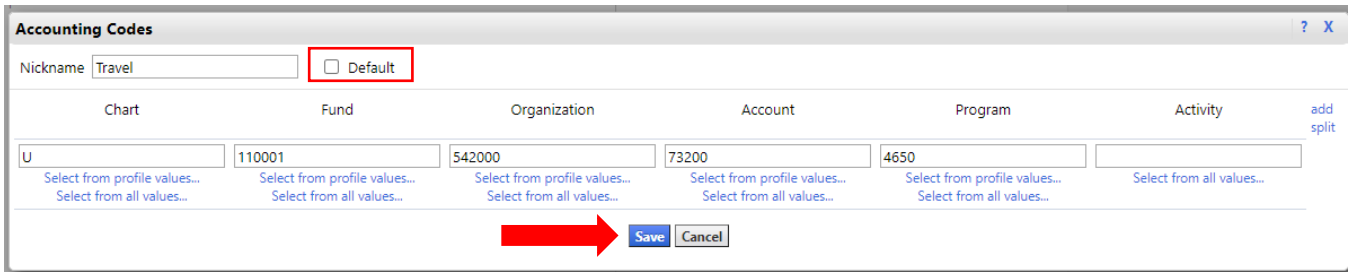
All other codes are set up by this same process by line Using Edit, Create New Value, Search, Select, Add Value, Edit, select Default, Save, then Close.

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.



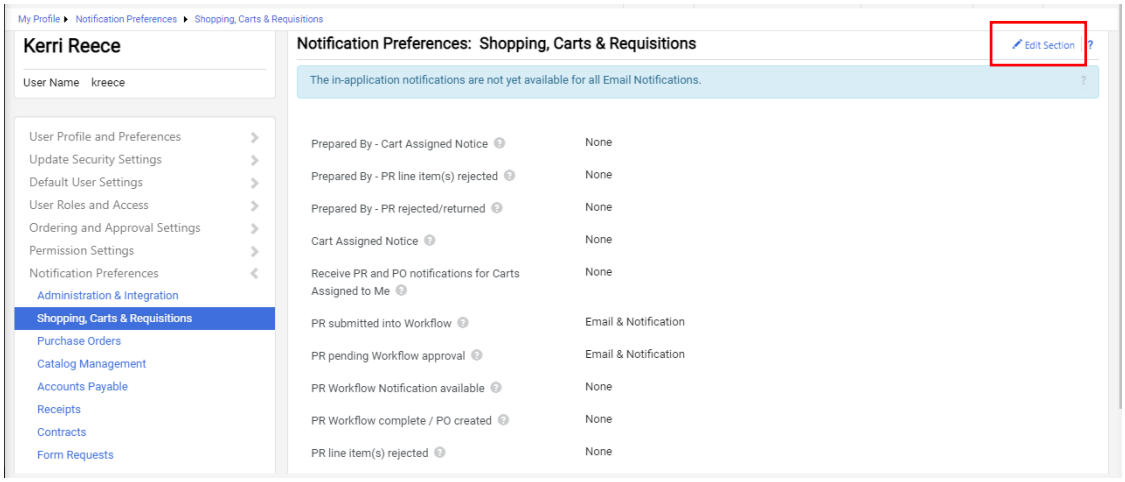
Click **Add**. An Accounting Code box opens. Type in a name for your FOAP. Use the check bos to choose you Default allocation. You can type in the numbers, select from your profile codes (see additional Intructions), or select from a list of all the codes available. You can leave parts blank, depending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



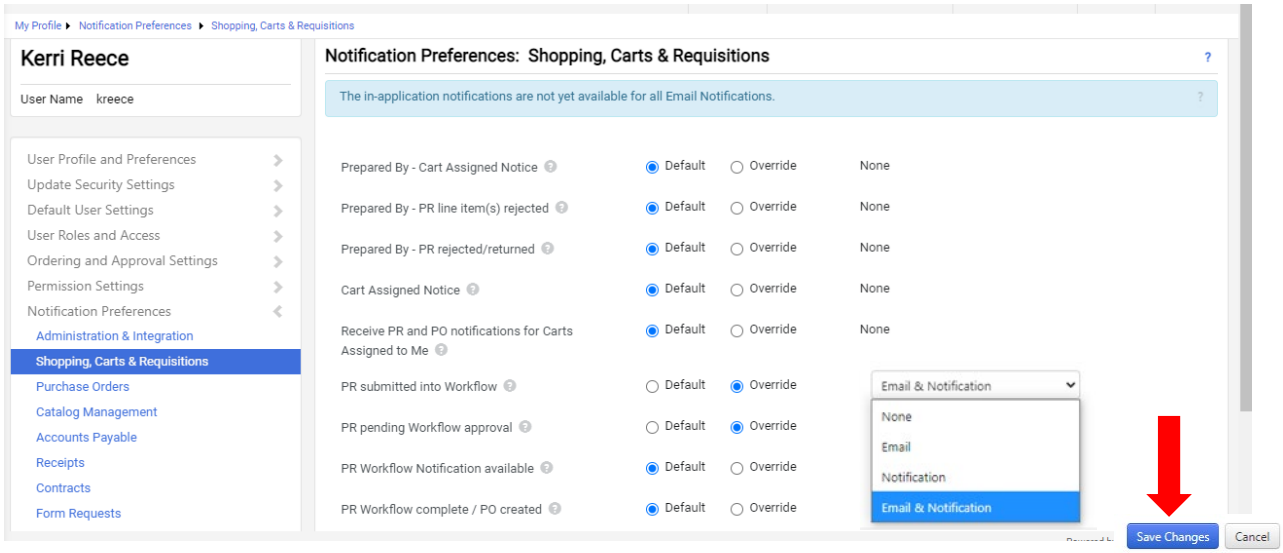
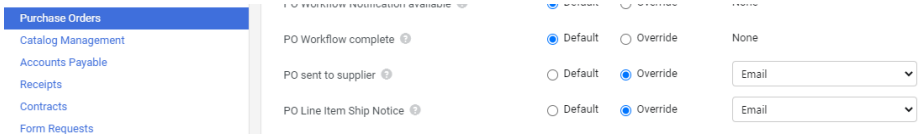
Notification Preferences (Best practice):

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 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.



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)