



# Tigerbuy Training

Welcome to Tigerbuy Training. Tigerbuy is the University's online eProcurement system. We will be covering basics of the Tigerbuy software to help you get started and navigate in the system.



# Basic Purchasing Process

1. Shop
2. Create Requisition
3. Submit Requisition for Approval
4. Banner Budget Check
5. Review & Approval by Financial Manager
6. Approved Requisition flows through Procurement
7. Banner Budget Encumbrance
8. PO issued to Vendor
9. Receive items or services in system
10. Invoice verified in system and paid
11. Close PO & release funds



# Tigerbuy User Roles

- **Requestor** - builds shopping carts to create purchase requisitions
- **Approver** - approves purchase requisitions for an Organization
- **Receiver** - verifies receipt of goods and services in the purchase order

The **Requestor** and the **Approver** are **2 separate individuals** for a purchase requisition. This provides for the separation of duties requirement for initiating and approving purchases for the University.

# Purchase Requisition



Building a Purchase Requisition happens in a Tigerbuy shopping cart

Shopping Cart • Shopping Cart All changes saved

Simple

Advanced

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

Cart Name

Please name your cart!

Sole Source & Contract Order


Description

Priority

Normal

2 Items

Staples Contract and Commercial Inc • 2 Items • 83.78 USD

^ SUPPLIER DETAILS 

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: 1/17/2023 12:27:33 PM

- Staples 30% Recycled Copy Paper 8.5" x 11", 20 lbs., White, 5000 Sheets/Carton (112350/461757)
- Staples Remanufactured Black/Color High Yield Ink Replacement for Canon PG-240XL/CL-241XL (STPG240CL2412PK), 2/Pack

Details

For

Kerri Reece

Total (83.78 USD)

Proceed To Checkout



# Methods to Purchase

**Purchases are either Catalog or Non-Catalog**

**Catalog Purchases** - Requester selects items to purchase from a Vendor Catalog or Tigerbuy List to build a shopping cart.

**Non-Catalog Purchases** - Requester enters item or purchase information in a form to build a shopping cart.

# Catalog Purchases



## Punch-out Catalogs

Punch-out					
 E&I CNR01362 09/30/24	 OMNIA MA3457 05/05/25	 TBR 110930 07/31/24	 SWC# 034905 12/31/23	 OMNIA R160901 03/31/2024	 SOURCEWELL 081419CDW 10/30/24
 UofM RFP153046253 06/30/27	 Orders >\$10K must have quotes	 Fisher Scientific Part of Thermo F... UT5500008085 02/28/2027	 OMNIA R211402 11/30/24	 NASPO ValuePoint #52634	 OMNIA #4400006644 11/30/23
 Orders >\$10K must have quotes	 formerly life Orders >\$10K must have quotes	 Orders >\$10K must have quotes	 Sourcewell GPO Member ID 535	 NASPO 16000234-2 02/28/24	 Sourcewell 091422WWG 11/08/26

# Catalog Purchases



**Hosted Catalog** – We maintain these catalogs in the Tigerbuy site. These vendors have products included in Tigerbuy for searches using the “Shop” Search box.

A screenshot of the Tigerbuy search interface. At the top, there are two tabs: 'Simple' (which is selected and underlined) and 'Advanced'. To the right of the tabs is a navigation bar with links: 'Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order' and 'Browse: Suppliers | Categories | Contracts | Chemicals'. Below the tabs is a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a blue search button with a magnifying glass icon on the right.

Requesters can search by categories, vendor, or description to select products that fill a Tigerbuy Shopping Cart.

**Do not combine Vendors in a shopping cart.**

# Non-catalog process

A screenshot of the University of Michigan procurement system interface. At the top, there are two tabs: 'Simple' (selected) and 'Advanced'. To the right of the tabs is a navigation bar with links: 'Go to: Non-Catalog Item', 'Favorites', 'Forms', 'Shop', 'Quick Order', 'Browse: Suppliers', 'Categories', 'Contracts', and 'Chemicals'. Below the navigation bar is a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a magnifying glass icon on the right.

The Non-catalog process involves the Requestor typing the purchase information into the form to fill a shopping cart.

- Purchase information for a Non-catalog order might be from a quote, agreement, or vendor communication.
- When entering information from a Vendor quote, each line item must be entered separately. This is required for accurate shipment, receipt of goods, and payment for each item from quote.



# Non-catalog process



### Add Non-Catalog Item

Existing Supplier

The Vendor must be in the Tigerbuy system to begin entry

Item

Description *	Catalog No.	Quantity *	Price	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each ▼

254 characters remaining

Additional Details

Manufacturer Name

Manufacturer Part No

Product Flags

☐ Controlled substance

☐ Recycled

☐ Hazardous material

☐ Select Agent

☐ Toxin

☐ Energy Star

☐ Green

★ Required fields

Save

Save And Add Another

Close

# Tigerbuy Specialty Forms



A form is a method of entering information in the Tigerbuy system for processing. All forms go into a Tigerbuy Shopping Cart to process through the Tigerbuy system.

- **Change Order** - Procurement makes all changes to a purchase order once it has been issued.
- **Moving Services** – Procurement orders moving services
- **Vendor Payment Form** (exception only) – used to pay vendor when Request & PO were not done

# Change Order



- Changes can be increasing or decreasing units, unit cost, adding a line or cancelling a line, closing balances left on orders, cancelling orders.
- If you increase a purchase order, the dollar amount of the increase should be entered by line in the form for the requisition.
- Explanations for the change should be stated in the “Product Description” box.

## Change Order Request

Available Actions: Add and go to Cart



Go

Close



### Supplier Info



Enter Supplier



or

[Supplier Search](#)

### General Info



#### Non-Configurable Fields

General 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

Catalog No.

Product Description

Change Order Request



254 characters remaining

[expand](#) | [clear](#)

#### Quantity

Packaging (UOM)

Estimated Price

EA - Each



#### Configurable Fields

Manufacturer Name

Manufacturer Part No

Purchase Order Number



Please close balance on POxxxx. Invoicing is complete.

Please increase Line 1 to \$150.00

Please cancel Line 3. Lead time too long.



# Moving Services



Moving Services
Available Actions: Add and go to Cart
Go
Close

Supplier Info

Supplier
Bid Supplier
Fulfillment Address
Fulfillment Address 1:

General Info

Non-Configurable Fields

General Instructions

This form is to be used when a local (campus) move is being requested. Account number 74986 must be used in the FOAPAL. Complete and attach Specification Sheet for Local Moves <http://bf.memphis.edu/forms/procurement/move.pdf>.

All attachments and notes can be added in cart review.

Form Type
Product Description

Quantity
Estimated Price

External Service Request

254 characters remaining
expand | clear

To  
See conf

The University of Memphis  
Specification Sheet for Local Campus Moves

Requisition Number:
Contact Person:
Date:
Department:
Phone Number:

Desired Move Date:
Budget Account:

Moving From:	Moving To:
Building: Floor:	Building: Floor:
Rooms:	Rooms:
Loading Dock? <input type="radio"/> Yes <input type="radio"/> No	Loading Dock? <input type="radio"/> Yes <input type="radio"/> No
Adjacent Parking? <input type="radio"/> Yes <input type="radio"/> No	Adjacent Parking? <input type="radio"/> Yes <input type="radio"/> No
Elevator? <input type="radio"/> Yes <input type="radio"/> No	Elevator? <input type="radio"/> Yes <input type="radio"/> No
Stairs? <input type="radio"/> Yes <input type="radio"/> No	Stairs? <input type="radio"/> Yes <input type="radio"/> No
Items to be moved:	
Special Requests:	
Special Needs: <input type="checkbox"/> Boxes <input type="checkbox"/> Tape <input type="checkbox"/> Labels	

# Vendor Payment Form



**Vendor Payment** **Exceptions ONLY** Available Actions: Add and go to Cart Go Close

**Supplier Info** ?

Enter Supplier

or  
[Supplier Search](#)

**General Info** ?

**Non-Configurable Fields**

General Instructions

The Vendor Payment Form is only intended to be used on an exception basis, e.g., small dollar repairs of equipment, must physically go to the store and select the item, the system is down and items are needed on an emergency basis. Please use this form for invoices that require a payment to a supplier/vendor not associated to an established purchase order. Fax invoices to ACCOUNTS PAYABLE (3595), or mail to AD275. Reference the purchase order number on all documents. Receive all quantities for payment of your invoice. THIS FORM SHOULD ONLY BE USED FOR PURCHASES less than \$10,000.00 and should ONLY be used on an EXCEPTION basis.

Form Type

Product Description

Quantity

Packaging (UOM)

Estimated Price

Vendor Payment

254 characters remaining [expand](#) | [clear](#)

EA - Each

**Total** 0.00  
[See configuration for this form](#)

# Receipting



The Receiver verifies the receipt of goods and services in a Tigerbuy Purchase Order. Receipting is the approval that the Organization is ready to pay for a purchase.

- **Quantity Receipt** - Use this for tangible items, such as supplies.
- **Cost Receipt** - Use this method to authorize specific dollar amounts, such as for services.

Quantity Receipt • 469166

Summary Comments Attachments History

Line Details

PO • P0288657

Line	Item	Catalog No.	Quantity	Status
1	Staples File Folders, 3 Tabs, Letter Size, Manila, 50/Box (25775)	541077	1 PK	0

ITEM DETAILS

Contract No. no value

Previous Receipts Y00001978

Received  
Returned

**Draft**

Details

Creation Date 11/9/2021 10:43:05 AM

Source Manual





Supplier Staples Contract and Commercial Inc

Received by Kerri Reece

# Returning



Returns are always a three-part process:

1. **Communicating** with the vendor involved to initiate the physical return process and to get information on receiving credit. A Credit Memo from the Vendor is required when there is a return. Invoice will not be paid until credit is received.  
2. **Internally processing** the return in the Tigerbuy Purchase Order, ensuring the invoice and credit involved are processed correctly. 
3. **Physically returning** the item to the vendor if required 



# Returning



Any item returned to vendor has to be Received in the system and then Returned.

To create a return in the system, create a quantity receipt document and select **returned** for the line being returned and enter the unit(s) returned.

Quantity Receipt • 469166

Summary Comments Attachments History

Line Details

PO • [P0288657](#)

Line	Item	Catalog No.	Quantity	Status
1	<a href="#">Staples File Folders, 3 Tabs, Letter Size, Manila, 50/Box (25775)</a>	541077	1 PK	<div>Received Returned</div>

ITEM DETAILS

Contract No. no value

Previous Receipts Y00001978

**Draft**

**Details**

Creation Date 11/9/2021 10:43:05 AM

Source Manual

Supplier [Staples Contract and Commercial Inc](#)

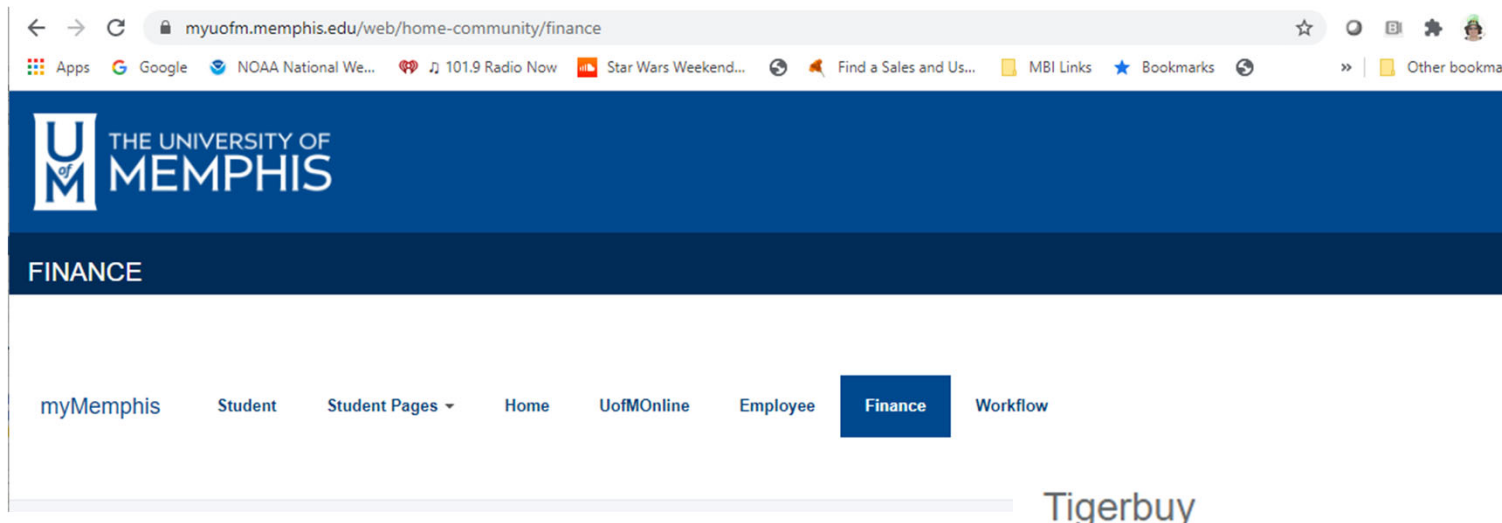
Received by Kerri Reece



## Tigerbuy Live demo

- **Shop** (catalogs, non-catalog, moving)
- **Create Requisition** (shopping cart / Tigerbuy cart)
- **Submit Requisition for Approval**
- **Receive items or services in system**
- **Returns & Changes**
- **Close PO & release funds**

# Logging in to Tigerbuy Production



Tigerbuy Production will not open if you do not have Banner Access.



Tigerbuy

[Tigerbuy \(Production\)](#)

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

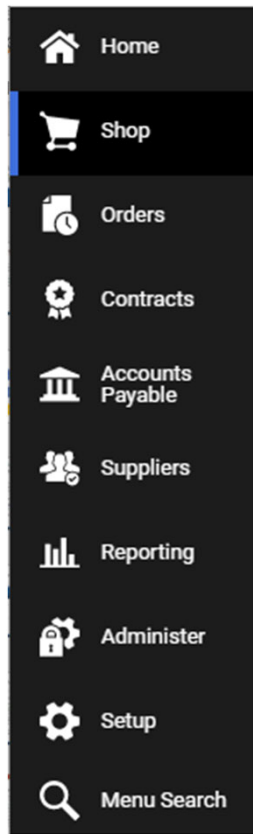
[Tigerbuy \(Test\)](#)

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

[Diversity Suppliers List](#)



# Navigation BAR-left side of page



Icons located here take you to specified areas within Tigerbuy. The important pages are:

## **Shop/My Carts and Orders/View Carts**

This path takes you to the Cart Management screen for users

## **Orders/Search**

This path takes you to the Tigerbuy search screens

## **Orders/Approvals**

Requisitions to Approve (Pending Requisitions for Approver)

Requisitions Recently Approved by Me

# Main Workspace of Home Shopping Page



Simple Advanced

Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order

Search for products, s

**Search bar for hosted catalog items**

Welcome to Tigerbuy, the online marketplace for eProcurement at the University of Memphis. For questions, contact Procurement & Contract Services by calling **2265** or emailing [procurement@memphis.edu](mailto:procurement@memphis.edu).

- Guidelines are provided for users to view the criteria and process for purchases by the University of Memphis: [Procurement Guideline](#)
- To access Tigerbuy training documents and generic video snippets, view this information at: [Tigerbuy Training Materials](#)

**Tigerbuy Message Board**  
Information and quick links to assist Users with the eProcurement System.

**Tigerbuy Specialty Forms**

- [Change Order Request](#)  
Used to Modify Purchase Orders
- [Moving Services](#)  
Campus Moves
- [Vendor Payment](#)  
Orders <\$10K - EXCEPTION Basis

**Hosted Catalog Suppliers**

- [Millipore Sigma](#)  
Orders >\$10K must have quotes
- [PC Specialists Inc](#)  
Orders >\$10K must have quotes
- [Graybaft](#)  
OMNIA #EV2370 - 01/31/23

**Punch-out**

- [Airgas](#)  
E&I CNR01362 09/30/24
- [TBR\\_105 Consortium](#)  
07/31/23
- [SWC# 034905](#)  
12/31/22
- [#FERGUSON](#)
- [Fisher Scientific Part of](#)
- [GLOBAL](#)

**Specialty forms** are for special issues. Each form is unique for what it is used for and each form has instructions for use when opened.

## Purchasing Showcase

This is where you begin all purchases.

This area is set up to with links and icons to access vendor catalogs (Punch-outs) and search for vendors and products from participating vendor catalogs (Hosted Catalogs). There are many search options and filters to narrow searches.

# Process Overview

