Top 10 Best Practices for TechBuy

- Double check budgets before you submit (FI002 or FI004) or available budget tab in the Portal.
- Use punchout and hosted catalogs when possible. The prices are negotiated and you will get savings that you won’t get in the vendors website or physical store.
- Get a quote when possible on non-catalog transactions. Attach your quotes in the external notes and attachments section. Anything is this section will go to the vendor. Anything in the internal notes section will not go to the vendor.
- Review the line and header FOAP summary tab before submitting each requisition. You need to make sure the FOAP’s you want are on each line item.
- Verify the fax/email address for the vendor on each form. These can be customized per requisition/PO.
- Use the add comment feature to make comments and provide documentation for the purchasing and accounts payable staff. Don’t forget to add the appropriate purchasing and AP staff name to the comment so that they will get the email.
- Create a new form when possible.
- Review the Shipping and Billing Tabs to make sure not more than one PO is created (unless that is intended). Having more than one Bill To and Ship To can result in more than one PO.
- Use the cart naming function. This will allow you to identify your transactions more easily when running queries.
- If entering more than one line item, always select the same category (on the form) each time. Choosing more than one slows the requisition down by causing the requisition to go to several Purchasing approval folders. For example, don’t choose equipment on one line and shipping on the other line. Select equipment for all line items so the correct purchaser gets the requisition.