



Purchasing Training

August 17, 2023

Procurement Services

<http://purchasing.tamu.edu/>

979-845-4570

Requisitions

- A “requisition” is a means of communicating between the end user (you), the vendor and/or Procurement Services.
 - The “requisition” needs to provide all details of what you want to purchase. The more information we have the better we can help you get what you want.
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Requisitions

- What do I want to buy?
- What is the estimated cost?
 - \$25K or less
 - \$25,000.01 or +
- Who can sell this product/service?
 - Sole source or more than one vendor
 - Available on a purchasing cooperative
 - Is there an existing signed agreement

Requisitions

- How many do I want?
- When do I need it?
- Do I have a quote or proposal from suggested source?
- If a sole source, do I have a sole source justification?
- Do I have an adequate description of what I want?
- Do I need this installed?
- Are there any special instructions?

Product Description

- Ensure the product/service description is clear and concise.
 - Does it provide enough information that anyone could understand what is desired to be purchased.

Example – Do you know what this is?

- CON-SNT-A45K8 CON-SNT-A45K8 (1 years)

Product Description

- What about this?
 - AAD-38400 M365 EDU A5 Unified ShrdSvr
ALNG SubsVL MVL PerUsr MSRP
\$52,560.00 Term: 9/1/23-8/31/24
 - WMS Subscription Service dates 7/1/2023-
6/30/2024
 - South Wall Design Concept

Product Description

- Those were examples of line-item descriptions we receive daily. We need your backup documentation to help us know exactly what you are wanting to purchase.
 - Ensure you have provided to us the best description possible.
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Scope of Work

- When purchasing services, we need a scope of work and the deliverables you require.
 - Scope of Work – summaries project tasks, assignments and deliverables.
 - Deliverables – what are the end results
 - Reports
 - Updated website

Scope of Work - Example

- **Personal Laundry at Home:**
 1. **Sorting:** Separate clothes based on color, fabric type, and washing instructions.
 2. **Pre-Treatment:** Check for stains and apply appropriate stain removers before washing.
 3. **Washing:** Load the washing machine according to its capacity, add detergent, and select the appropriate cycle based on garment requirements.
 4. **Drying:** After washing, transfer clothes to the dryer or hang them on a clothesline, depending on fabric and preference.
 5. **Ironing:** Iron or steam clothes that require it, ensuring they are wrinkle-free and well-presented.

Scope of Work – Example

6. **Folding:** Fold clothes neatly and organize them for storage or use.
7. **Putting Away:** Return the folded clothes to their designated storage areas.
8. **Cleaning Up:** Clean the washing machine and dryer lint traps and tidy up the laundry area.

It's important to note that laundry work should always follow fabric care labels and specific washing instructions to avoid damaging clothes. Whether you're doing laundry at home or offering commercial services, attention to detail and care are crucial to ensure clean, well-maintained clothing.

Requisitions

- **Important Reminders –**
 - By providing as much information as possible, it will help to speed up the process.
 - Rush Request – send us an email, put a note on the internal side of the requisition. Let us know when it is needed and why.
 - Requisitions are worked in date ordered received, but we work on rush request as they come about. We understand that things popup from time to time.

Master Orders

- A Master Order is an information copy of items that have been bid out to determine a set price for a certain length of time.
 - For example, we have bid out uniforms for the athletic soccer team. The invitation to bid consisted of 12 items of different articles of clothing with an estimated quantity for each item.

Master Order

- As the soccer team needs to order some uniforms, they decide which items and in what quantity they purchase.
- The Master Order number is referenced on the order and invoice.
 - This provides a “trail” to determine what procurement process was utilized to make this purchase.

Master Order

- We can add language to the master order that allows us to add additional items, delete items and/or make modifications to items.
- The master order has renewal language that is optional for both parties. Either party (vendor or department) can decide not to renew for the next contract term.

Master Order

- The vendor had the opportunity to quote a maximum percentage increase for the next contract term within the invitation to bid.
 - At the renewal stage, this percentage is confirmed and agreed upon as acceptable for the next contract term.
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Master Orders

- The contract term typically follows our fiscal year – September 1st through August 31st.
- There is no guarantee of purchase and the quantities provided are an estimate annual usage. It could be more or less.

Master Order

- Pricing structures for master orders range from set pricing for specific items, discount from list off entire catalog or cost plus on the entire catalog.
- Pricing structure remains firm the entire contract term.

Master Order

- By using this process, you can avoid the formal bidding process year after year.
 - The master order allows you to have an agreement in place for a five (5) year term.
 - In most cases, your pricing is better, because the vendor knows they could have this business for five (5) years.
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Master Orders

- Procurement Services keeps track of your master orders and renews them annually on your behalf.
 - We reach out to ensure you wish to renew and then work with the vendor.
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Master Order

- If you have items and/or services you purchase year after year, let's talk. We might be able to create a master order for you and simplify this process for you.

Questions!

Submit topics for future training to

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Please use subject line –

Training for TAMUSA