

Preferred Service Providers

Procurement Forms

General Steps

- ▶ Locate the Preferred Services Provider Form under Procurement Forms in Jaggaer.
- ▶ Select the supplier name from the drop-down. Verify the correct address is being used. Associate the existing contract with the supplier.
- ▶ Enter the lines from the supplier quote and ensure descriptions, pricing, and charges match the supplier documentation.
- ▶ Review the requisition for accuracy, correct any errors, and verify the shipping address and account string before proceeding to checkout.
- ▶ Attach the supplier quote, contract, estimate, or other supporting documentation to substantiate the purchase request.
- ▶ Select Place Order to submit the requisition for approval. Once approved, a Purchase Order will be issued to the supplier, and invoices must be manually uploaded to the Purchase Order for payment.

What is a Procurement Form?

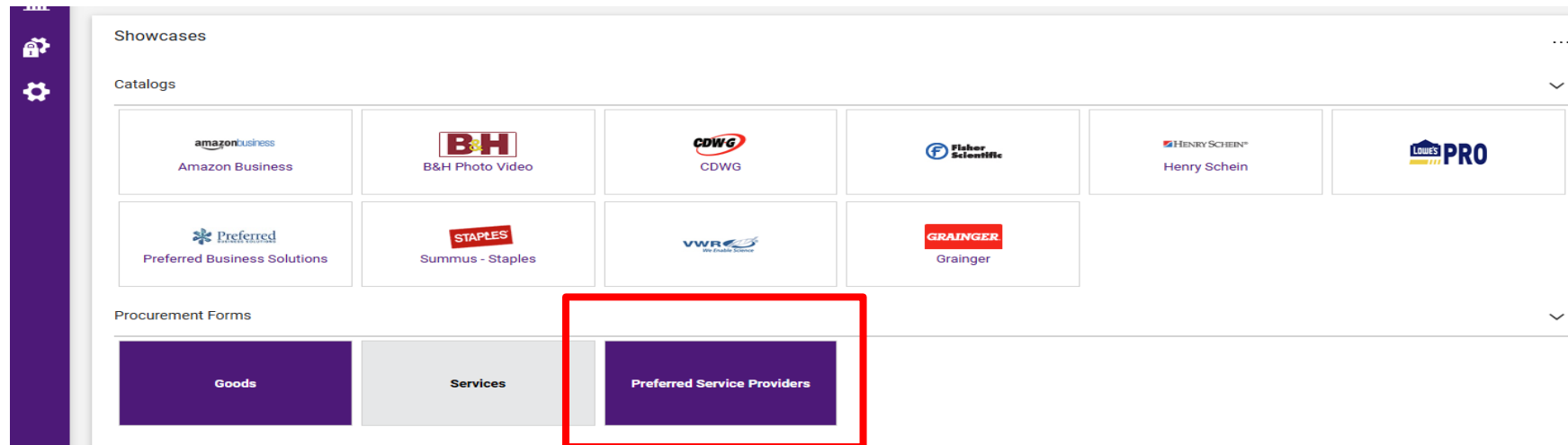
- ▶ Procurement Forms are used to request goods or services that are not available through a Jaggaer Punchout Catalog.
- ▶ Verify the purchase is not exempt from a Purchase Order under Appendix B of the Procurement Policy.
- ▶ A Purchase Order is created from the approved requisition, and will be issued to the supplier after approval.

Two Roles in Jaggaer

- ▶ A Requester creates and submits requisitions for goods and services.
- ▶ An Approver reviews and authorizes purchases on behalf of their department.
- ▶ Depending on your Jaggaer role, you may submit the requisition yourself or assign it to a Requester for final submission.

Preferred Service Providers Form

- ▶ Begin by selecting the Services Form from the Procurement Forms section.
- ▶ This form should be used when purchasing services from a supplier listed on the Preferred Service Providers list: <https://finance.tcu.edu/contracts-procurement-travel/contracts/master-service-agreements.php>



Select a Supplier

- ▶ Choose the supplier from the drop-down list of active Preferred Service Providers.
- ▶ After selecting the supplier, choose the associated contract from the available contract list.

Instructions

Use this form to submit a request for the purchase of services, an MSA must exist for the vendor to use this form

Supplier

Supplier Information:

Existing Supplier

Supplier ★ Affairs Afloat Balloons LLC ▼

Fulfillment Address 8912 White Settlement Road
Fort Worth, Texas 76108 United States

Supplier Phone +1 817-367-3100

Contract ★ Select Contract

Select Contract - Google Chrome

solutions.sciquest.com/apps/Router/FormContractSelectionPopup?SupplierId=1006463087&fulfillmentCenterId=136032459...

Select Contract

Select Contract

☐ No Contract

☒ TCU-005260-FY2025 (MSA- Affairs Afloat Balloons, LLC)
Master Service Agreement to be used by TCU Campus Events.

OK Cancel

Complete Line Items

- ▶ Complete the form so it matches the supplier's quote, proposal, or statement of work as closely as possible.
- ▶ Most Preferred Service Provider purchases are entered as a single service line describing the services being provided.

Service Information

Commodity Code	Search...
Description ★	Purple balloon arch for staff event 219 characters remaining expand clear
Estimated Price ★	500.00
Requested Service Start By Date: ★	8/3/2026 mm/dd/yyyy
Requested Service End By Date: ★	8/5/2026 mm/dd/yyyy

Information for Service Provider

Onsite Contact: Name ★	Mary Grace Held
Onsite Contact: Phone Number ★	817-257-1428
Onsite Contact: Email ★	mary.grace.held@tcu.edu
External Attachments ★	Add

Internal Information

Internal Attachments	Add
----------------------	---------------------

Review and Check Out

- ▶ Any errors displayed within the requisition must be corrected before proceeding.
- ▶ Review all validation messages and make any required corrections.
- ▶ Once the requisition is ready, select Proceed to Checkout.

Shopping Cart • 217816922



...

Assign Cart

Proceed To Checkout

1 Item

Select All

Affairs Afloat Balloons LLC • 1 Item • 500.00 USD

SUPPLIER DETAILS

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	 Purple balloon arch for staff event			500.00	Qty: 1	500.00	...

ITEM DETAILS

Contract

TCU-005260-FY2025
MSA- Affairs Afloat Balloons, LLC

Commodity Code

Summary

Details

For

Mary Grace Held

Name

Test Cart

Total (500.00 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.

Total: 500.00

Assigning a Cart

- ▶ If you do not have Requester permissions, select Assign Cart to transfer the requisition to an authorized Requester.
- ▶ Search for and select the appropriate individual within your department.
- ▶ The Requester can then review and submit the requisition on your behalf.

The screenshot shows the TCU Shopping Cart interface. At the top, the cart total is 812.38 USD. Below the header, the cart ID is 204686817. A red box highlights the 'Assign Cart' button. The main content area shows 3 items, with the first item being 'Half Pencils' from Robert Half International. The item details show a quantity of 142 EA - Each at a unit price of 2.57, totaling 364.94. The 'ITEM DETAILS' section is expanded, showing a search bar for the commodity code.

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	Half Pencils	1234567	EA - Each	2.57	Qty: 142 EA - Each	364.94

The screenshot shows the 'Assign Cart: User Search' dialog box. It has a search bar with the text 'no value SELECT or SEARCH'. Below the search bar, the 'Note To Assignee:' field is populated with 'PROFILE VALUES' and 'JOHNNY TREVINO'. At the bottom right, the 'Assign' button is highlighted with a red box, along with a 'Close' button.

Shipping and Accounting

- ▶ Verify that the shipping or delivery address is correct before submitting the requisition.
- ▶ Review the account string to ensure the purchase is being charged to the correct budget.
- ▶ If updates are needed, select the pencil icon to modify the shipping information or account string.
- ▶ Different line items may be assigned to different account strings when appropriate.

Shipping and Accounting

General

Business Unit

TCU

Texas Christian University

Cart Name

2025-08-01 108018342 01

Description

no value

Prepared by

Mary Grace Held

Prepared for

Mary Grace Held

Cart Source

Manual

Shipping

Ship To

Attn: Mary Grace Held

3101 BELLAIRE DRIVE NORTH

Rm 2102

Fort Worth, TX 76109

United States

Delivery Options

Ship Via

Best Carrier-Best Way

Billing

Bill To

TCU-Financial Services

TCU Box 297011

Fort Worth, TX 76129

United States

Billing Options

Accounting Date

no value

Description

no value

(This field will print on check)

Summary

Draft

✖

Correct these issues.

You are unable to proceed until addressed.

Required: Business Unit

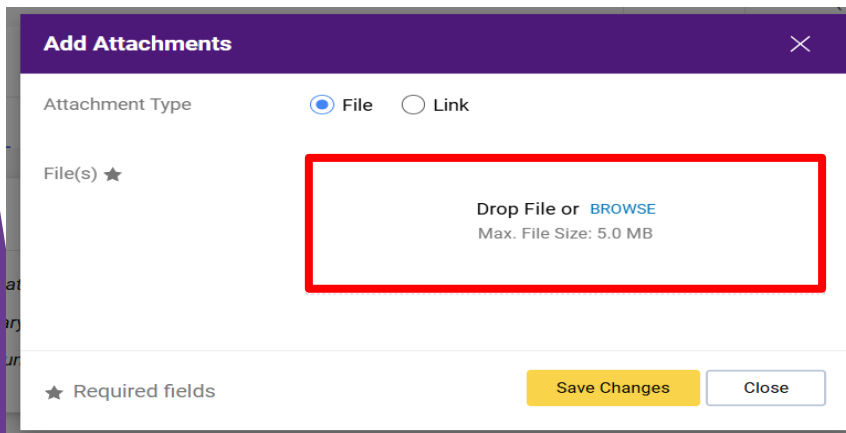
Required: Account

This Supplier does not have a PO Distribution Email on file. Please complete a Supplier Request to initiate the process of that Supplier providing the information TCU needs to be eligible for PO Purchases.

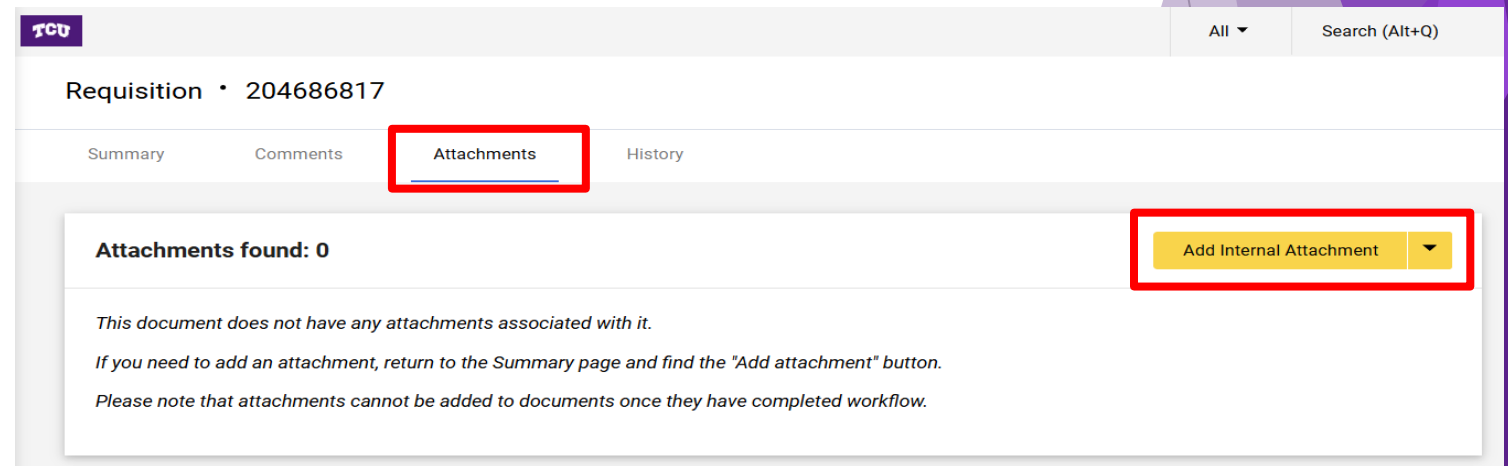
Accounting Codes				
GL Unit	Account	Fund	Department	Project
TCU Texas Christian University	no value ✖ Required	11000 TCU General	22200 Financial Services	no value

Attachments

- ▶ Every Procurement Form must include supporting documentation.
- ▶ Supporting documents may include supplier quotes, proposals, estimates, contracts, or similar records.
- ▶ Open the Attachments tab and upload all required documents before submitting the requisition.



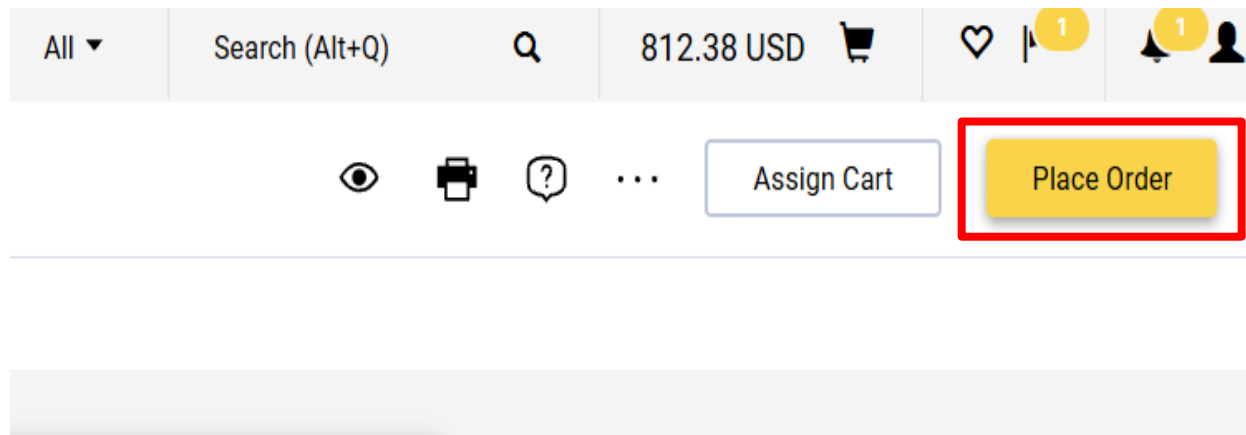
The 'Add Attachments' dialog box is shown with a purple header. It contains an 'Attachment Type' section with 'File' selected and 'Link' as an option. Below this is a 'File(s)' section with a red-bordered box containing the text 'Drop File or BROWSE' and 'Max. File Size: 5.0 MB'. At the bottom, there are 'Save Changes' and 'Close' buttons, and a 'Required fields' indicator.



The screenshot shows the 'Attachments' tab of a requisition form for requisition 204686817. The 'Attachments' tab is highlighted with a red box. Below the tabs, it says 'Attachments found: 0' and 'Add Internal Attachment' with a dropdown arrow, both highlighted with red boxes. The main content area contains a message: 'This document does not have any attachments associated with it. If you need to add an attachment, return to the Summary page and find the "Add attachment" button. Please note that attachments cannot be added to documents once they have completed workflow.'

Submission

- ▶ Review the requisition one final time to ensure all information is accurate and complete.
- ▶ Confirm that all required supporting documentation has been attached.
- ▶ Select Place Order to submit the requisition into workflow approval.



Approval Workflow

- ▶ The requisition will automatically route through the appropriate approval workflow.
- ▶ Additional approvals may be required depending on the account strings used.
- ▶ Once all approvals have been completed, a Purchase Order will be issued to the supplier.

Paying Supplier Invoices

- ▶ A Purchase Order does not remit payment to a supplier. It tells the supplier the items or services you wish to purchase from them, and provides a “promise to pay” agreement.
- ▶ In order to pay the supplier, you must submit an invoice against your Purchase Order. Review the Manual Invoice Process guide for steps on how to pay an invoice.

An aerial photograph of the Texas Christian University (TCU) campus, showing various buildings with red-tiled roofs, green lawns, and trees. The image is framed by a purple and white geometric border on the left and bottom right.

Finance & Administration
Office of Procurement

QUESTIONS?

Email

Procurement@tcu.edu

TCU