Finance & Administration
Office of Procurement

Preferred Service Providers

Procurement Forms

June 2026

LEAD ON.℠

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?

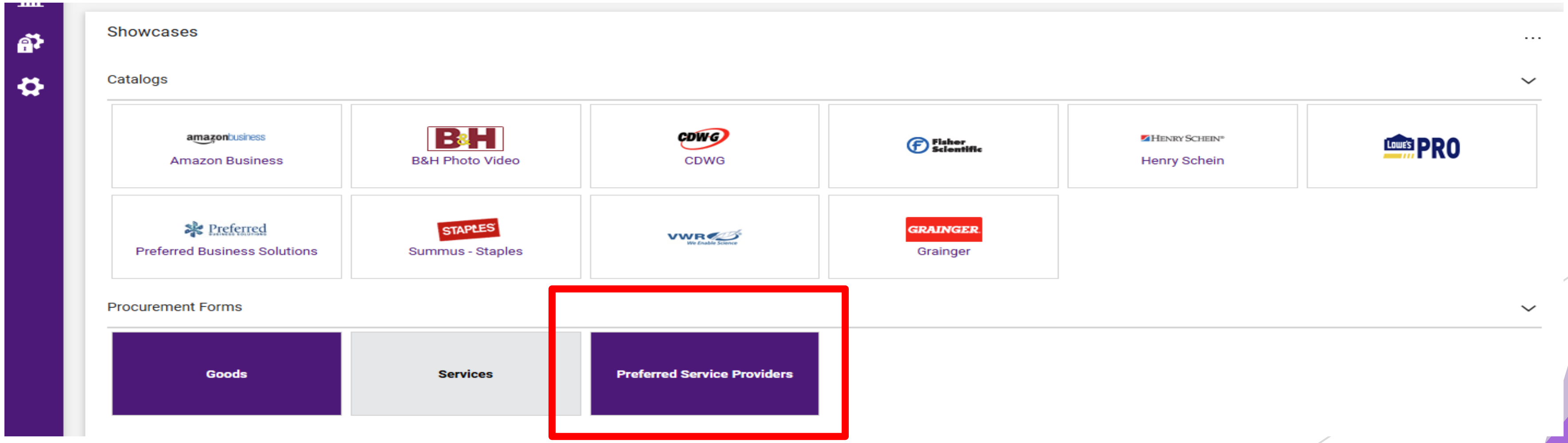
- Procurement Forms are used to request goods or services that are not available through a Jaggaer Punchout Catalog.
- Verify the purchase is not exempt from a Purchase Order under Appendix B of the Procurement Policy.
- A Purchase Order is created from the approved requisition, and will be issued to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

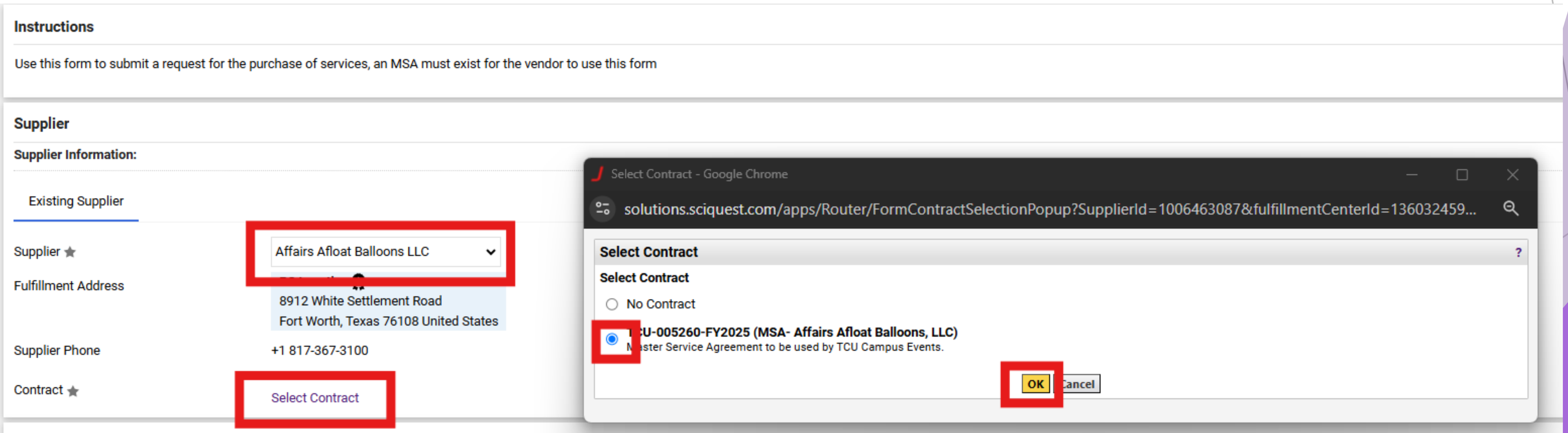
Preferred Service Providers Form

- 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*



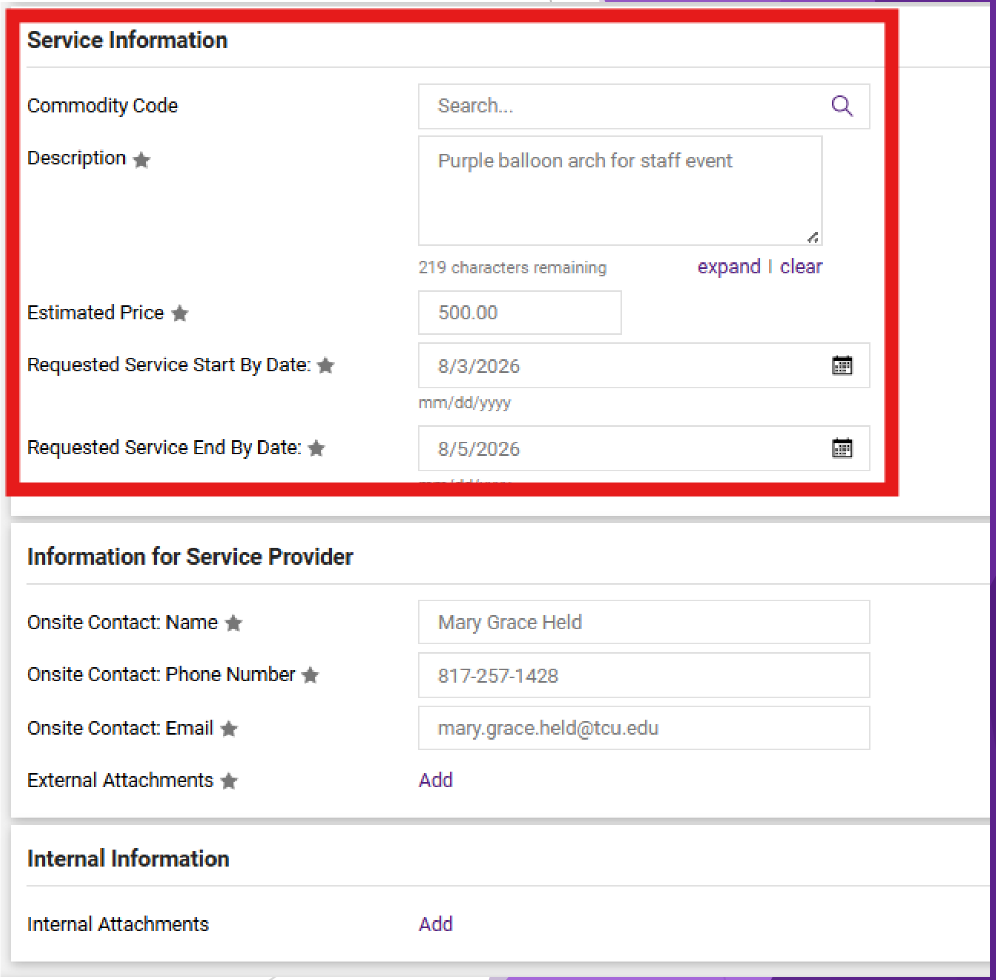
Select a Supplier

- 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.



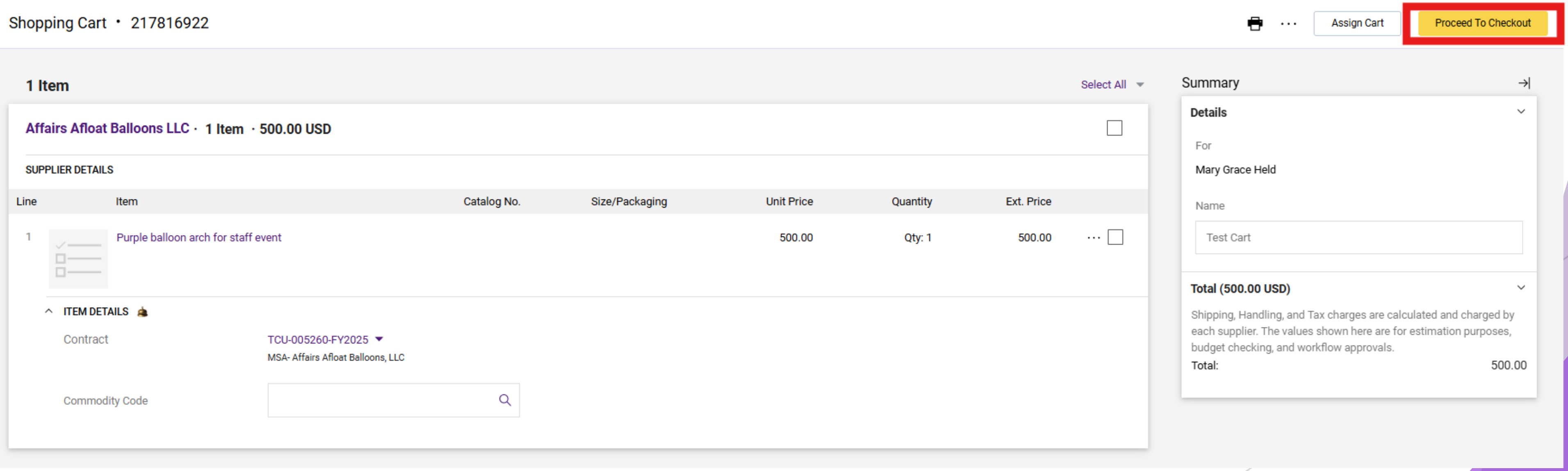
Complete Line Items

- 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.



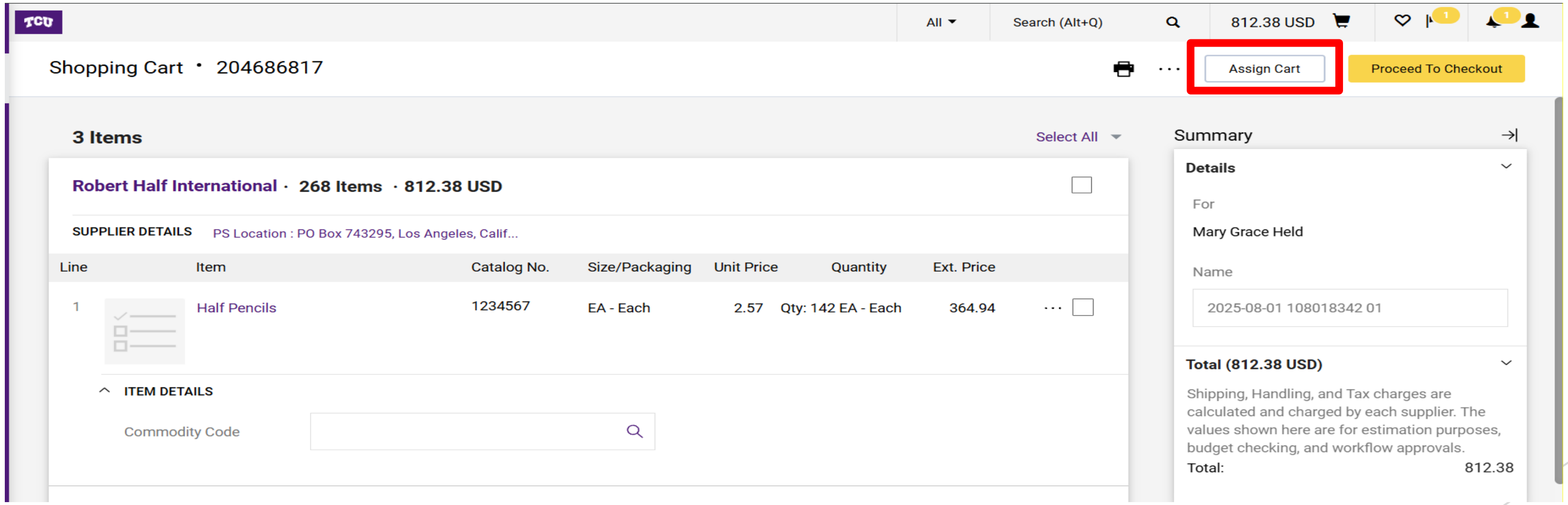
Review and Check Out

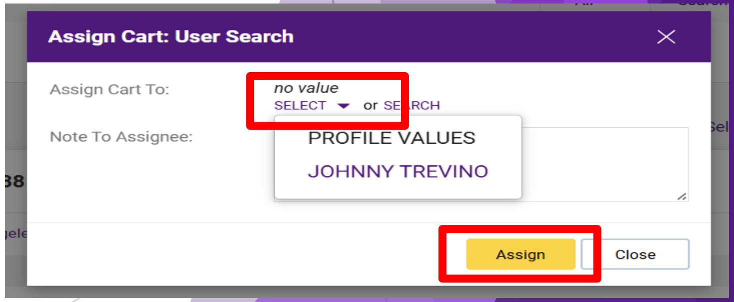
- Any errors displayed within the requisition must be corrected before proceeding.
- Review all validation messages and make any required corrections.
- Once the requisition is ready, select Proceed to Checkout.



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.

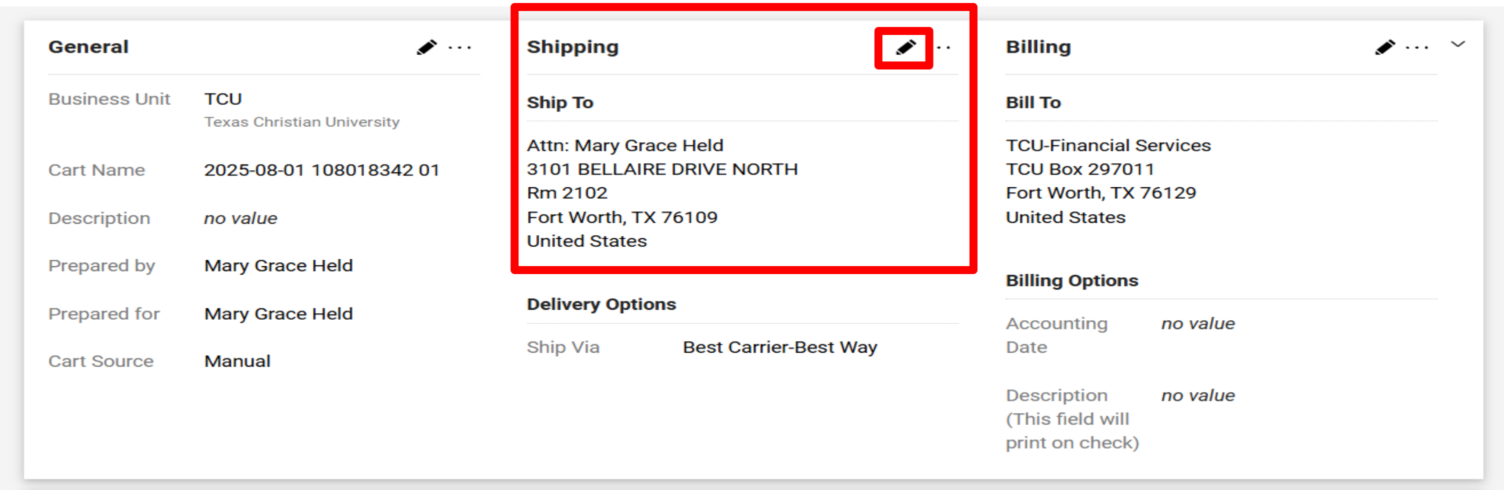




Shipping and Accounting

- 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

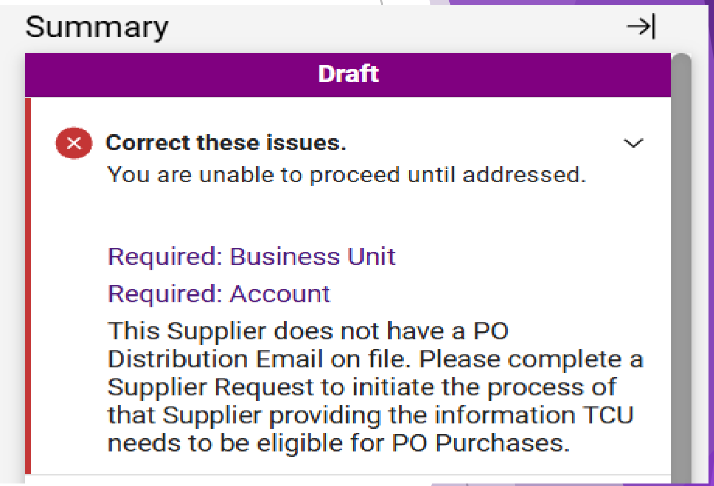
Billing

Bill To

TCU-Financial Services
TCU Box 297011
Fort Worth, TX 76129
United States

Billing Options

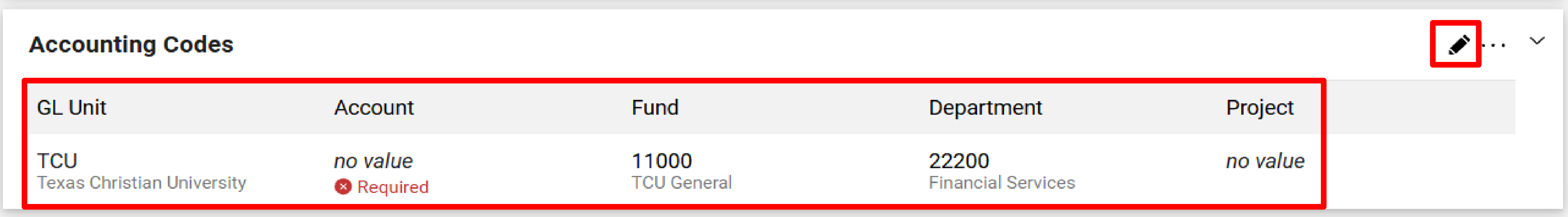
Accounting Date	*no value*
Description (This field will print on check)	*no value*


Summary

Draft

Correct these issues.
You are unable to proceed until addressed.

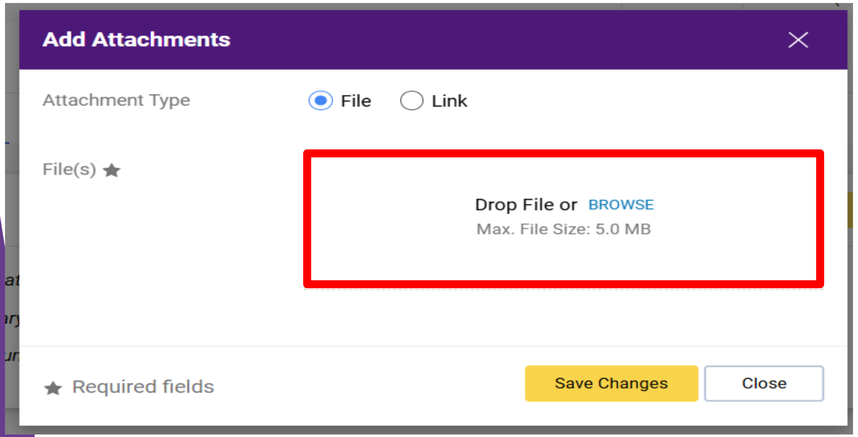
Required: Business Unit
Required: Account
This Supplier does not have a PO Distribution Email on file. Please complete a Supplier Request to initiate the process of that Supplier providing the information TCU needs to be eligible for PO Purchases.

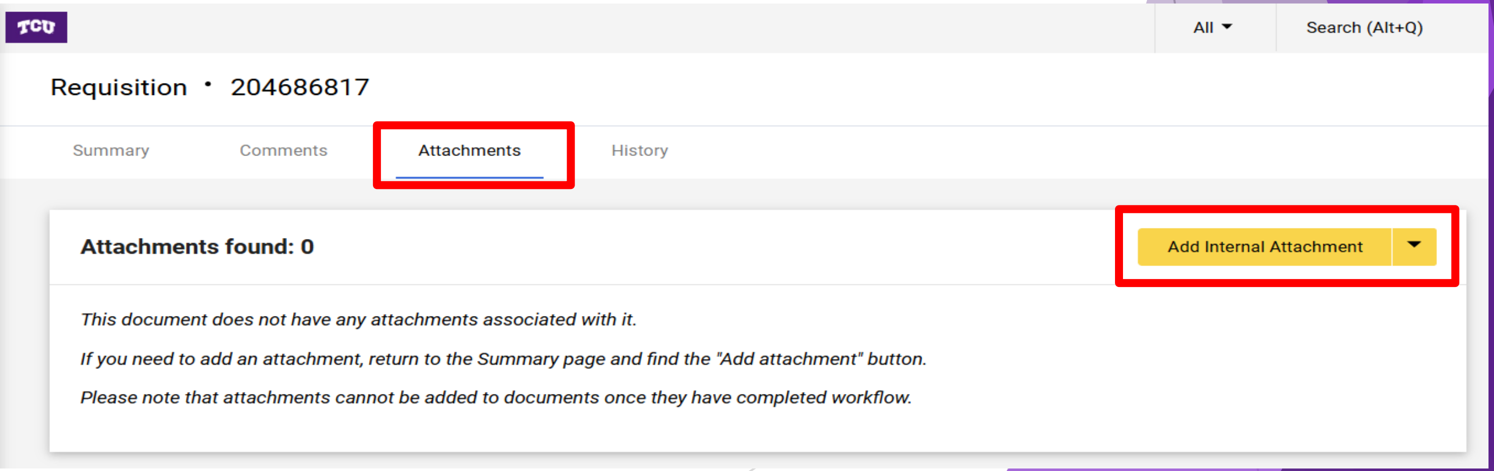

Accounting Codes

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

Attachments

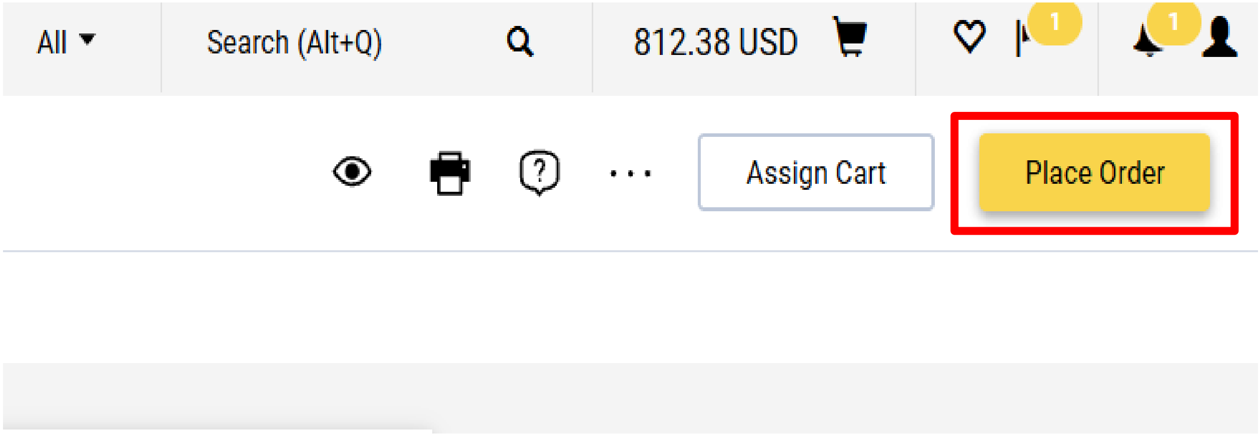
- Every Procurement Form must include supporting documentation.
- Supporting documents may include supplier quotes, proposals, estimates, contracts, or similar records.
- Open the Attachments tab and upload all required documents before submitting the requisition.





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 again your Purchase Order. Review the Manual Invoice Process guide for steps on how to pay an invoice.

QUESTIONS?

Email
Procurement@tcu.edu

TCU