



Purchasing Training

7/27/23

Procurement Services

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

979-845-4570

Delegated Purchasing Authority

- As of July 18, 2023 your department delegation limit was raised to \$25,000
- Now What??

Obtaining Quotes

Payment Terms – The university wants the payment term to be 100% Net 30 – Upon Receipt and Acceptance

- Look out for prepayments, deposits, and/or progress payments
 - If you pre-pay and product or service is not received, you probably will lose that money
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Obtaining Quotes

- Delivery Term
 - Make sure quote indicates the delivery time. This could be a reason for not accepting their quote
 - Delivery can be a factor in award

Obtaining Quotes

- Freight Terms – The university would like all shipments under the freight term

Destination, Prepaid and Allowed.

- This means – we do not own the product until it reaches our location and the freight is included in the price.
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Obtaining Quotes

- Additional Freight Terms –
 - Destination, Freight Prepaid and Added
 - Shipping Point, Freight Prepaid and Allowed
 - Shipping Point, Freight Prepaid and Added
- Shipping Point – means we own the product when it leaves their dock

Obtaining Quotes

- Why do we not want to own it before it arrives at our location?
 - If the shipment is lost or damaged during transit, we are now the responsible party to work with the shipping company to obtain a refund for that product.
 - This is a long and difficult process. We do not have the staff to handle these issues.

Obtaining Quotes

- Request the vendor to modify the freight term to one of the Destination options. We would rather pay for freight charges than deal with freight claims.
 - If vendor will not modify the freight term, you either accept the risk or you could purchase freight insurance.
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Obtaining Quotes

- Product Description – make sure the vendor’s quote completely details what you are requesting. It should include model numbers, power requirements, etc.
 - If an item is listed as a “no charge” item on the quote, make sure you include that item on your purchase order.
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Obtaining Quotes

- Pricing & Unit of Measure – Make sure the pricing and UOM is correct. If you requested pricing for 10 boxes – ensure your quote states 10 boxes not 10 each. Check the pricing – we see errors in extensions.
- Discounts – did the vendor offer any discounts – you can always ask for any/all educational discounts. They might have something they can offer.

Obtaining Quotes

- Make sure your quotes are apples to apples – not apples to oranges.
- Did each vendor provide a quote for the same thing? If not, you are not going to be able to compare what is the best value for the university.

Obtaining Quotes

- Procurement Services recommends obtaining a minimum of three quotes.
 - Be sure to include HUB vendors when possible. HUB vendors can be found by searching the State of Texas CMBL.
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Obtaining Quotes

Tabulation Sheet

Company			
Address			
City, State			
Terms	Net 30	Net 30	Net 30
FOB	Destination	Destination	Destination
Delivery Days			
Quoted by			
VID #			
HUB Status			
AggieBuy (Yes/No)			

#	Qty	Unit Price	Ext.Price	Unit Price	Ext.Price	Unit Price	Ext.Price
1		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
5		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
8		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Questions!

Submit topics for future training to

p-winkler@tamu.edu

Please use subject line –

Training for TAMUSA