

TechMart

Frequently Asked Questions (FAQ's)

What is TechMart?

TechMart is Caltech's web based e-Procurement solution designed specifically for a higher education environment. It is the Institute's official requisitioning tool. TechMart features:

- One-stop, sustainable shopping experience
- Wide range of suppliers and products
- Reduced material costs through pre-negotiated pricing

When should I use TechMart?

For items **available** through Punchout or Hosted Catalogs, **TechMart** should be the mode of purchase used whenever possible, as the Catalog Suppliers offer pre-negotiated pricing. Other advantages to using TechMart include:

- No P-Card reconciliation
- Use of favorites saves data entry for repetitive orders

For items **not available** through Punchout or Hosted Catalogs, users have the option of purchasing via TechMart or P-Card, depending on the payment method(s) accepted by the supplier.

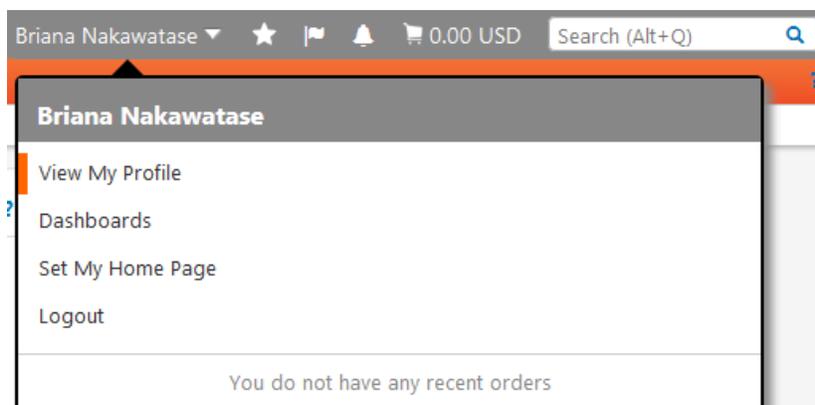
How do I sign up for TechMart?

To gain access to TechMart, you will need to complete the [TechMart Security Access Form](#).

In-class TechMart training will be offered monthly. To enroll in a TechMart training class, email TechMartHelp@caltech.edu.

How do I view/edit my TechMart profile settings?

In TechMart, you can edit and customize your profile to meet your specific needs. In your profile, you can create Default PTA's, view your Purchasing/Approval Limit and Financial Approvers, customize Notification Preferences, etc.



What Catalog Suppliers are in TechMart?

Current Catalog Suppliers can be found on the TechMart Shopping Home page, grouped by commodity.

Note: Punchout Suppliers will have a pop out symbol  in the upper right-hand corner.



Can I use a Supplier who isn't a Catalog Supplier?

Yes. If your item is not available through a Catalog Supplier, you can order from a Non-Catalog Supplier. All of the suppliers available in Oracle are also available in TechMart. If you want to purchase from a new supplier, the new supplier can be added to TechMart.

What documentation do I need to attach in TechMart?

- For outgoing Purchase Orders, a quote/proposal should be attached to the TechMart Requisition (if obtained). Any other relevant document(s) that may be useful to the Purchasing Official should also be attached.
- For orders exceeding the \$10K competitive threshold requirement, you must attach **(a)** at least two quotes/proposals and a [Competitive Procurement Summary](#) (only required if you are *not* purchasing from the lowest bidder) or **(b)** a [Noncompetitive Justification](#) form. See [Section 2.5 Competition](#) of the [Purchasing Goods and Services Policy](#) for additional details.
- **Unauthorized Orders:**
 - [Reimbursements](#) must have proof of payment documentation attached to the TechMart Requisition, including receipts, paid invoices, or credit card statements.
 - [Invoice Attached](#) requisitions must include a copy of the invoice.

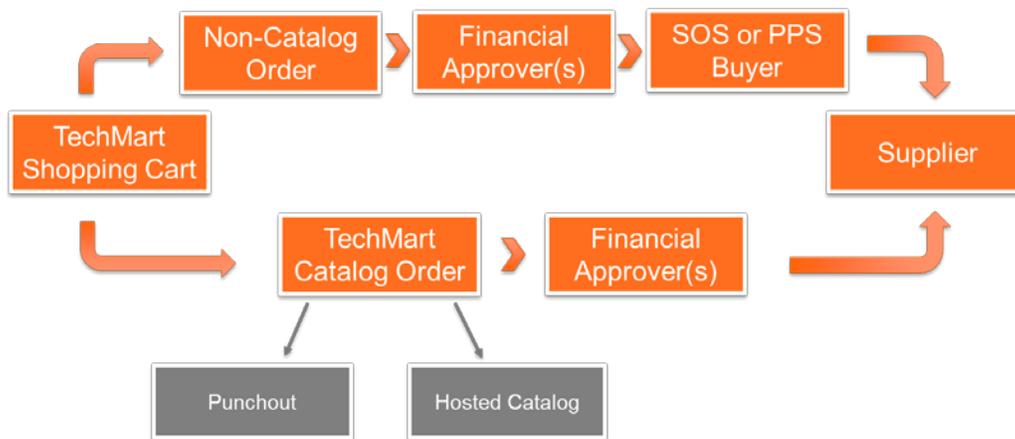
How do I split POETA's?

You can split a POETA at the header level (applies to all line items) or at the line level (applies to individual line item). If you wish to split the POETA (i.e. 50%/50%), select **edit** or **view/edit by line item** then **add split**. Adding a split will allow you to split by percent or amount.

The image shows two screenshots from a procurement system. The top screenshot is the 'POETA Codes' form, which has fields for Project, Task, Award, Expenditure, and Organization. Each of the first four fields has a 'no value' warning and a 'Required field' indicator. An 'edit' button is located at the top right. A red arrow points to this button with the label 'Header level'. Below the POETA Codes form is the 'Accounting Codes' form, which has similar fields for Project, Task, Award, Expenditure, and Organization, plus a '% of Price' field and an 'add split' button. A red arrow points to the 'add split' button with the label 'Line level'. Another red arrow points to a 'View/edit by line item...' link between the two forms.

What happens after I submit a TechMart Requisition?

Your TechMart Requisition will be processed through the appropriate workflow, depending on the order type and procurement dollar value. The diagram below compares the workflow of a Non-Catalog Order vs. Catalog Order:



What is a Blanket Purchase Order?

A Blanket Purchase Order is a term contract or basic agreement between Caltech and a supplier to address recurring low-value purchases of goods and/or services for a specific period of time. Generally, before a Blanket Purchase Order is released, the following considerations have been taken into account:

1. There is a known repetitive requirement for a broad class of goods or services, and
2. Specific items required from a supplier's product line cannot be accurately projected and may vary considerably, and
3. Accurate projections of quantities needed over the year cannot be made.

The department's requirements for a quick and efficient method of ordering products fit all of the above considerations.

What if my Approver will be out for an extended period of time (i.e. vacation, leave)?

If your default approver is out for an extended period of time and will be unavailable to approve your requisition, you can select an alternate approver from your profile values. Approvers can also make arrangements to “Assign Substitute” to accommodate a long or planned absence.

How do I check order status?

Refer to [How To: Check Order Status](#)

How do I find my previous orders?

Refer to [How To: Search Orders](#)

How do I order from Airgas?

- To order through the Airgas Punchout, refer to [How To: Order Compressed Gas](#)
- To order a specialty gas (not available through the Airgas Punchout), refer to [How To: Order Specialty Gases](#)
- **All Airgas orders must use the Ship To location “CYLINDERS”**