



Vendor Billing Reference Guide

Using the BuyBoard V.4

BuyBoard Overview

The BuyBoard is an online purchasing cooperative that gives its customers (members) access to thousands of items that have gone through a competitive procurement process. Members include school districts, cities, counties, universities, other governmental agencies, and non-profit organizations.

Vendors that are awarded a BuyBoard contract are approved to sell their products to BuyBoard members.

Who are BuyBoard Members

Members include Texas school districts, cities, counties, universities, other local governmental agencies, and non-profit organizations.

The three companies which have members participating on the BuyBoard are The Local Government Purchasing Cooperative, Texas Association of School Boards, and National Purchasing Cooperative.

Members participating under The Local Government Purchasing Cooperative are Texas school districts, cities, counties, universities, and other local governmental agencies inside the state of Texas.

Members participating under Texas Association of School Boards are non-profit organizations inside and outside the state of Texas.

Members participating under National Purchasing Cooperative are local governmental agencies which reside outside the state of Texas.

Understanding Why Members Use the BuyBoard

Members use the BuyBoard for a variety of reasons:

1. To abide by competitive procurement laws – customers purchase from approved BuyBoard vendors, knowing those vendors have already gone through the competitive procurement process.
2. To eliminate bidding – using the BuyBoard lets customers eliminate the time and cost associated with placing bids.
3. To save time – customers can purchase a vast array of products all in one location.
4. To save money – BuyBoard vendors offer savings to customers who purchase products through the BuyBoard, coupled with internal administrative savings, the BuyBoard is a very cost effective procurement vehicle.

Understanding How Members Use the BuyBoard

Members browse the BuyBoard to locate products and to obtain price information. Members use that information to compare prices and to verify that they are getting the best deal through the BuyBoard.

Members use the BuyBoard's RFQ feature to request quotes from vendors and to obtain additional price discounts off items.

Members take advantage of the other features of the BuyBoard to keep track of purchases made through the BuyBoard for bid compliance, audit and pricing.

Billing Procedures

BuyBoard Service Fees

The following service fees are billed on a monthly basis.

1. A service fee calculated at 2% of purchase order amount on all orders other than the following exceptions.
2. A flat fee of \$400.00 per purchase order is billed on vehicle orders.
3. A flat fee of \$800.00 per purchase order is billed on bus and ambulance orders.
4. A flat fee of \$1,500.00 per purchase order is billed on fire truck orders.
5. A .005% service fee is calculated on fuel purchase orders.

The BuyBoard relies solely on documentation and communication submitted by members and vendors.

Monthly Reports

At the end of the month, an Invoice and a Statement of Outstanding Balances is processed. Vendors will receive an email notification when the reports are ready to be retrieved.

Vendors will go to the website and retrieve the reports directly from there.

The Invoice is a report of the BuyBoard service fee for all orders entered onto the system for a specified month.

The Statement of Outstanding Balances is a report of ALL unpaid balances at the end of the specified month.

☞ Note: This report ONLY recognizes those payments which are posted to our bank account within the specified month.

How to Determine What is Actually Due to the BuyBoard

There may be times when the amount invoiced by the vendor is smaller or greater than the actual purchase order amount submitted by the member.

The actual amount due to the BuyBoard from the vendor is 2% of the invoiced amount, less freight or the flat rate fee per purchase order invoiced by vendor.

What Information is Required to be Submitted with Payments

The BuyBoard must know the exact amount that is being submitted for each order.

The Statement of Outstanding Balances provides a [Comments] section for dollar amounts being remitted (if other than billed amount), or notations regarding the particular order. (i.e. – Not Shipped)

Any payment that is not paying an invoice in full and is remitted without documentation will not be posted until detailed backup is received by BuyBoard.

Payments on Open/Blanket Purchase Orders

Since the service fee of 2% is established on the amount of the purchase order submitted by a member, the 2% fee will be billed on the full amount of an open or blanket purchase order as submitted.

The amount due from the vendor for these types of orders is 2% of invoiced amount, as invoiced.

Notation for these payments will be the dollar amount submitted and the word “Partial” until purchase order is closed.

If there is an unused balance on the order after the order has been closed, an adjustment will be made to zero out the balance and the order will be shown as paid in full.

Remittance Addresses

It is possible to receive three invoices and three statements from the BuyBoard, depending on the type of member placing the order.

For orders from Texas school districts, cities, counties, universities, and other Texas local governmental agencies, payment is remitted to The Local Government Purchasing Cooperative.

For orders from non-profit organizations, payment is remitted to Texas Association of School Boards.

For orders from local government agencies outside the state of Texas, payment is remitted to National Purchasing Cooperative.

The proper "Remit To" address appears at the bottom of each invoice and statement of outstanding balances.

All three companies are individual companies. Each has their own Federal Identification Number and remittance address.

Collection Policy

How to Keep an Account in Good Standing

Communication, Communication, Communication.....If a payment cannot be made in a timely manner, an explanation from the vendor is required.

An account will remain in good standing as long as there is open and timely communication from the vendor.

Steps taken for Collection

If an account has unpaid items which are 121+ days past due AND there has been no communication from the vendor, the following steps are taken for collection.

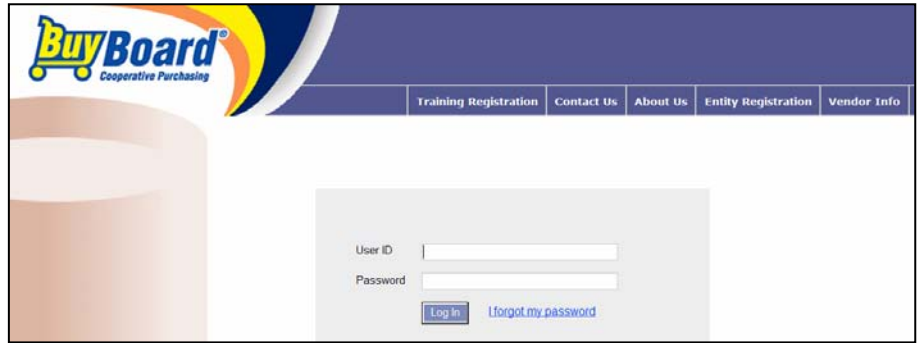
1. An email is sent to the vendor requesting status update on the unpaid item.
2. If there is no response to the email, the first collection letter is sent. This letter requires a payment or explanation within 30 days from the date of the letter.
3. A second letter will be sent if the terms of the first letter are not met. This letter will inform the vendor their account will be inactivated if a payment or explanation is not received within 30 days from the date of the letter.

The third letter informs the vendor their account has been inactivated due to a breach of contract. Future purchase orders received by the BuyBoard under the vendor's contract will be returned to the member(s) with an explanation that vendor status and contract have been terminated, and notice of the termination may be posted on the BuyBoard website. The account will be reviewed to determine if referral to a collection agent or legal action to collect will be taken.

Logging in to the BuyBoard

1. Launch Internet Explorer.
2. Enter the BuyBoard URL <http://www.buyboard.com>, then press **Enter**.
3. At the BuyBoard Login page, enter your **User ID** and **Password**, then click “Login”.

Note: Logins are case-sensitive. Check to see if your caps lock key is on if you can't login.



If you have forgotten your password, click “I forgot my password” and enter your User ID. Your password will be emailed to you. If you don't remember your User ID, call the BuyBoard at 800-695-2919 or send an email to info@buyboard.com. The first screen that opens upon log-in is the BuyBoard News page that provides vendors relevant information regarding the BuyBoard.

REPORTS TAB

The following reports are available to view or print based on your vendor profile and role.

PO Status Report – Available to all vendors and allows you to view/print a report of purchase orders processed.

Reports
PO Status
Vendor Ledger
Vendor Invoice
Vendor Statement

Purchase Order Status

Start Date:

End Date:

Vendor: VendorQRG

Group:

Status:

- 1) Start and End Date – the default is set for September 1, 2006. You can change this by selecting the start/end date from the calendar that appears when you place your cursor in the field.
- 2) Group – select the group from the drop down list or default to all.
- 3) Status – select the status from the drop down list
 - **All Purchase Orders** – returns all processed PO's
 - **Accepted** – the PO has been successfully transmitted to you as the vendor.
 - **Cancelled** – the PO has been cancelled based on direction from you as the vendor or the member agency.
 - **Duplicate PO** – two PO's were processed in error and one has been marked as a duplicate.
 - **PO Disapproved** – the PO was rejected.
 - **Record Release** – the PO was entered into the BuyBoard for record purposes only and

not transmitted to you as the vendor.

- **Released** – the PO has been submitted to you as the vendor, but has not been acknowledged.

4) Click “View Report”. This will display only the first 1,000 purchase orders.

Purchase Order Status

[Change Criteria](#)

Show results Narrow Results:

Status Date	Status	PO Number	Vendor	Entity	PO Total	PO File
1/3/2012	Released	125688	VendorQRG	Manor ISD	\$100.00	View PO

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

- To search your results, you can use the **Narrow Results** field to search by date, status, PO number, Entity, or PO total. This is a cumulative search feature that will continue to refine the search based on terms or keywords. To search by PO Total be sure and use the \$ sign.
- To resort the Status Date, Status, PO Number, Entity, Or PO Total click the up/down arrow.
- To display more entries on the page select the amount desired, maximum is 100 per page
- Click the PO number to view the PO header, vendor and status information.
- To page thru the results click at the bottom of the page.
- To view the PO, click “View PO”. This will display the PO in a PDF format.

View Summary- provides a summary report by status and PO Total based on the criteria selected.

Purchase Order Status

[Change Criteria](#) [Print](#)

Purchase Orders for 12/20/2011 to 1/3/2012

Status	PO Total
Released	\$100.00
PO Totals	\$100.00

Export- provides an excel spreadsheet export based on the criteria selected.

Vendor Ledger Report- Available to vendors based on user profile. The Vendor Ledger provides information of all orders and payments submitted to the BuyBoard. Through this report, a vendor has the option of creating three types of reports, depending on their needs.

1. Click on Vendor Ledger

Vendor Ledger

Start Date:

End Date:

Invoice Type:

Vendor: VendorQRG

Payment Status:

2. Start and End Date – the default is set for 14 days prior. You can change this by selecting the start/end date from the calendar that appears when you place your cursor in the field.
3. Specify Invoice Type or leave as ALL

Invoice Type:

Vendor:

Payment Status:

4. Choose Payment Status:

Vendor: VendorQRG

Payment Status:

- **All Purchase Orders** – a report of all orders and payments submitted to the BuyBoard during the specified period.
 - **Open Purchase Orders Only** – A report of all unpaid orders submitted to the BuyBoard during the specified period.
 - **Paid Purchase Orders Only** – A report of all paid orders submitted to the BuyBoard during the specified period.
5. Click “View Report” or “Export” to export to an excel spreadsheet.
- ➔ Note: Type Definition:
SO = Purchase order
RC = Payment

Vendor Invoice Report –provides access to invoice(s) for any month from November, 2006 to current processed month.

1. Click “Vendor Invoice”

Vendor Invoices

Vendor: VendorQRG

Invoice:

2. Select from the drop-down the option of monthly invoices for The Local Government Purchasing Cooperative and/or the Texas Association of School Boards.

Invoice:	Texas Association of School Boards - 1/1/2012 to 1/4/2012 ▼
	Texas Association of School Boards - 1/1/2012 to 1/4/2012
	National Purchasing Cooperative - 1/1/2012 to 1/4/2012
	The Local Government Purchasing Cooperative - 1/1/2012 to 1/3/2012

3. Select the desired invoice and click “View Report”. Click “Open” on the pop-up screen. Your selected report will be viewable and printable in PDF format.

Vendor Statement Report - provides access their Statement of Outstanding Balances for any month from November, 2006 to current processed month.

1. Click “Vendor Statement”
2. If the statement field is pre-populated that indicates that specific monthly statement is the only one with any outstanding balance. If not, select from the drop-down the option of statement for The Local Government Purchasing Cooperative and/or the Texas Association of School Boards.
3. Click “View Report”. Click “Open” on the pop-up screen. Your selected report will be viewable and printable in PDF format.

HELP TAB – Help screens and text.

Resources – The Resources page give you access to wide range of information and reports for the Texas Cooperative and the National Cooperative. Please make sure you are referencing the correct cooperative’s information that includes the following:

- Reference Guide for Vendors
- Vendor Billing Quick Reference Guide
- Current Proposals due dates
- Contract Expiration Schedule
- Conference Listing what BuyBoard staff are attending
- Membership Lists
- Cooperative Board of Trustees
- Texas Region Map
- Cooperative Rules and Standards for Logo use and Logos
- National Cooperative Membership Documents