What’s different in UD Exchange?

Required SpeedType

Previously, the person authorized to make the purchase would also be doing the shopping.

UD Exchange allows “shoppers” without purchasing authority to do the shopping, giving the cart to someone who can complete the purchase.
Adding Details to Shopping Carts

• Before the cart becomes a requisition, the shopper can add information that helps the requester. For instance, the shopper may not know accounting details, but does know who the items are for and where they should be shipped.

• The shopper can also add internal or external notes regarding the items

• This guide will illustrate how to add these details to your shopping cart needed for the Requester to place your order.
When the shopper’s cart returns from the punch-out catalog, notes can be made by clicking **Item Details**.
This will expand the information about each item. There are options available to add internal/external notes. For adding a note for approvers, add **Internal Note**.

This way, the requester and approvers know why the item is being ordered and if there are any special instructions for the approvers.
1. On non-catalog orders, such as those built from quotes, the supplier will be able to receive and review anything in **External Notes**.

2. **Internal Notes** are still for anyone at UD to review.

Changes are saved automatically when you move out of the field!
To complete a missing Shipping Address:
• Click **Proceed to Checkout from the cart**
• **Then** click the **Pencil Icon** in the Shipping section of the requisition.

Shipping Addresses cannot be added from the shopping cart and must be added from the requisition if not defaulted from the user’s profile.
1. If you have saved favorite shipping addresses to your Profile, you can select one from the **Ship to** menu.
2. Complete the required **Attn** and **Room** fields.
3. Click **Save**.
If you have not saved any favorite shipping addresses to your Profile, you can add an address by searching for a key word in the **Search Box**. Matching items will prefill, or click the magnifying glass.
1. Click on the address you want from the list of results.
2. You may also check the “Add to my addresses” box so it comes up as an option the next time. You may then give it a nickname and make it your default address.
3. Click Save.

Your shipping address is never complete without Attn: and Room: completed!
You can now see the selected address under the Shipping section.
Resources

Procurement Services
procurement@udel.edu

See also “Processing Shopping Carts” for full Requester training