What’s different in UD Exchange?

**Required SpeedType**

- Previously, UD employees allocated and submitted their purchases for approval after the fact.
- UD Exchange requires employees to complete their SpeedType information prior to placing their orders, so there is no need to review or allocate after the order has been placed.

**New Account Codes**

- Previously, requisitioners could use any account code on any type of transaction, often based on HOW the purchase was used.
- UD Exchange narrows down the account codes available for the type of purchase, based on that item’s commodity code (which is a nationally used code).
Adding Required Details to Requisitions

- Each shopping cart must have SpeedType and Account Code information when it is turned into a requisition.
- This guide will illustrate how to add this information to turn shopping carts into requisitions.
- **When working with an assigned cart, please click “Proceed to Checkout” and ensure the Requisition is on your screen, not the Shopping Cart, to proceed.**
1. If required information is *missing*, a notification banner will appear at the top of the page and the error icon (a red circle with an “X”) highlights where your attention is needed.

2. An error ‘**Required**’ message also displays next to the field missing required information.
To Complete a missing SpeedType:

Click the red Required field link under the SpeedType column in the Accounting Codes section.
1. Using the search window, enter search criteria into the Value or Description field.
2. Click Filter.
Find the SpeedType you want to use from the list of results.

Click ‘+’ to Select.
Click Save.

If you have cost share project or User reference information to add, scroll right to enter.
To Complete a missing **Account Code**:

Click the red **Required** field link next to Account Code in the **Item** section OR in the blue link on the right.
In the *Edit Line* window, Click the *Magnifying glass* link next to *Account Code*. 
Only the associated account codes will show in the pop-up window. 

1. Scroll, or enter search criteria by Value or Description. 
2. Click Filter.

When shopping from a catalog supplier, the commodity code will usually default for you.
Locate the most accurate Account Code in the list of results. Click ‘+’ to select.

To see a current commodity code-account code crosswalk, download it from the UD Exchange Home page.
2. Click Save.

If only one account code matches to that commodity code, it will default and not have to be chosen.
Click **Place Order** once all errors are resolved.
Resources

Procurement Services
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