Preparing a Non-Catalog Request
FOR SHOPPERS
What’s different in UD Exchange?

**Commodity Codes**
- Previously, UD employees would manually select an account code and category code for their purchases.
- In UD Exchange, employees will select a commodity code which will automatically generate the correct account code for the purchase.

**Allocation**
- Previously, UD employees would allocate their Procurement Card purchases after the fact.
- In UD Exchange, all purchases are allocated prior to ordering.
Submitting a Non-Catalog Requisition

• Catalog shopping in UD Exchange uses hosted or punch-out catalogs where UD-specific items and prices are offered by UD-contracted suppliers. “Non-catalog” shopping refers to purchases where hosted or punch-out catalogs are not used.

• A **non-catalog requisition** can be initiated by a Shopper or initiated *and* submitted by a Requester in UD Exchange.

• A **non-catalog requisition** usually begins with a quote from a supplier.

• A supplier must be registered in UD Exchange prior to completing a non-catalog form.

• **Note:** UD credit cards can still be used for the purchase of goods within the cardholder’s dollar amount.
Review the quote you have received from the supplier.

Take note of which items/services will need to be listed as separate line items on the non-catalog form.

While it’s preferred but not required to list out ALL items if they are the same commodity (e.g., building materials), it IS important to separate goods from services. It is also important to separate tagged equipment items.
In UD Exchange, go to **Shopping > Non-Catalog Item**

You can also start from the link in Quick Links!
1. The **Non-Catalog Item** window will appear.
2. Enter the name of the supplier into the **Enter Supplier** field.
3. Select the correct supplier from the list of results.
Enter the information for the first line item of your requisition in the **Description**, **Supplier Item Number (optional)**, **Quantity**, **Price**, and **Packaging** fields.

Tip: copy and paste line item information directly from the quote you received from the supplier.
You will be required to enter a Commodity Code for each line item. Click the magnifying glass next to the Commodity Code field to search for codes.
2. Click the Search button to see all commodity code options in a list.
3. You can also type various criteria in the **Code starts with** or **Description contains** fields to narrow your search.

Try keywords such as “services” in “Description Contains.”
A listing of commodity codes will appear. Select the code that most closely matches the item/service you are requisitioning.

Most UD Commodity codes are based on the UNSPSC Segment level. A crosswalk of Commodity Codes to Account codes is on the home page of UD Exchange.
1. The Commodity Code field will be filled with the code you selected.
2. Click Save and Add Another to add the next line item. Repeat the previous steps until you have added all of your line items, then click Save and Close.

You can also add additional line items from within your Cart or Requisition.
1. Click the **Shopping Cart** icon.
2. Select **View My Cart**.
1. Enter a name for your Shopping Cart in the Cart Name field.
2. Enter your quote number into the Quote Number field if applicable. Attachments and Shipping location can be accessed on the next page.
3. Correct or complete any missing information.
To change something in your cart, click on the blue item description link and edit the relevant field. Click Save.
Click Proceed to Checkout to turn the cart into a requisition.
**General section:**

Most information will be pre-filled from the information the Shopper entered.

1. The **eBuilder Process instance** field is for PPD use only. Facilities employees can add information to that field by clicking the pencil icon to **edit**.

2. The **Multi-Invoice/Payment** field is used when the invoices will not match quantities, such as counting down a dollar amount to zero. This will make the purchase order “Amount Only.” The requisitioner can select this option, or it can be selected by a Procurement Services staff member once the requisition reaches Procurement for review.
Shipping section:
Review the shipping address. If you have already saved a default shipping address to your profile, it will be pre-filled. If you need to search for a campus address, you can click edit, and a search box will appear for you.
Shipping section:
Search the shipping address by building name, code, street address. Do NOT use the non-campus address template for campus addresses.
Shipping section:
Choose the correct address and ensure Attn: and Room: are accurately completed. Add to your addresses if desired. Click Save.
Billing section:
There is only one central billing address for UD. It will be pre-filled.
**Buyer Information** section: Only Buyers in Procurement Services will see details of the requisition in this section.
Accounting Codes section:
Any accounting fields that need to be completed will be marked as a required field. Click the pencil icon to edit. Shoppers may wish to leave this segment to Requesters to complete. **Note that account code is not in the header, but at the line, associated with the commodity code.**
To edit, click on the magnifying glass in the SpeedType field. Facilities users may instead click on the arrow in the Work Order Number field to enter by Work Order.
A search box will appear.
1. Search for the SpeedType in the **Value** or **Description** field
2. Click **Filter**.
3. To select the SpeedType from the available options, click the “+” sign
All of the chartfield information associated with your SpeedType will be imported for you. Click Save.

If your SpeedType is not available, a Primary Cost Object Approver (PCOA) may not be assigned by General Accounting. Contact coa-finance@udel.edu for assistance.
Internal Notes and Attachments:

1. Click the Pencil Icon to edit Internal Note for Business Justification.
2. Add any Internal Attachments, such as competitive quotes, using the Add link.
External Notes and Attachments:
1. Click the Pencil Icon to edit **External Note** – this should be any comment you would like the supplier to receive on the PO.
2. Add any External Attachments, such as the supplier’s quote, using the **Add** link.
Line Item Notes and Attachments sections: Additional notes or attachments can be added on the line item if needed. Each note/attachment should be added only once to the requisition – do not duplicate attachments in internal/external and header/line!
**Supplier Information section:**
Click the **edit** button if any changes need to be made to the supplier information, such as the fulfillment address.

<table>
<thead>
<tr>
<th>Item</th>
<th>Catalog No.</th>
<th>Size/Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Robinson</td>
<td>EA</td>
<td>6,800.00</td>
<td>1</td>
<td>6,800.00</td>
</tr>
</tbody>
</table>

Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows.

Account Codes:
Account codes will have to be entered on each line for any commodity code that has more than one account code. Missing account codes will be called out on the right. Shoppers may wish to leave this segment to Requesters to complete.
Account Codes:
Clicking on either the red Required link on the line or the blue link on the right will bring you right to the missing field. Click on the magnifying glass.

If you change the commodity code here, you will have to save and re-open to see the account codes associated with your new commodity code!
Account Codes:
Only account codes associated with that commodity code will be shown. Click on the “+” to select that code, or filter at the top to narrow down the options.
1. Prior to submitting the requisition, you can see all of the approval steps that the requisition will go through.

2. Some approval steps offer the option to see the name(s) of the specific Approver that the requisition will route to after it is submitted if you click on them.
If you are a Shopper in UD Exchange, Click Assign Cart to submit your Non-Catalog Requisition to a Requester.
Choose Select to choose from your saved Assignees, or click Search to search for your Requester.
Add a note and click Assign.
You will receive confirmation that your cart has been assigned.
From your Assigned Carts you can View or Unassign if changes are necessary.

If you need to access your Assigned Carts, Navigate to Shop>My Carts and Orders>View Carts>Assigned Carts.
Resources

Procurement Services
procurement@udel.edu

See Also: “Submitting a Non-Catalog Request for Requesters”