What’s different in UD Exchange?

Central Shopping Hub

Previously, UD employees shopped directly from vendor websites with their Procurement Cards, sometimes missing out on special contracted pricing, or inadvertently shopping with vendors who were not the exclusive supplier for UD in certain product categories.

In UD Exchange, employees have access to UD contracted suppliers as well as other popular vendors all in one place. Billing is handled centrally by Procurement Services, and allocation and approval is completed before the order is placed.
Shopping Using Punch-Out Catalogs

- Catalog shopping in UD Exchange can be accomplished using hosted or punch-out catalogs. These catalogs have UD-specific items and prices offered by UD-contracted suppliers.
- **Punch-out catalogs** are maintained on the suppliers’ websites and accessed from within UD Exchange.
  - The punch-out catalog shopping experience is different from supplier to supplier.
  - Punch-out catalogs are created and maintained by each supplier so the exact steps of how to search, shop and add items to your shopping cart will vary.
Suppliers with a punch-out catalog are marked with a gray square icon with an arrow in it.

From your **Shopping Home** page, select a supplier by clicking on the tile with the supplier’s logo or name.
You will automatically be connected to the supplier’s punch-out.

Welcome to W.B. Mason!

DID YOU KNOW?

W.B. Mason Delivers Advanced Business Controls
With W.B. Mason's Advanced Business Controls you can let your employees order direct without losing control. Review orders, limit products purchased and specify how orders are placed to save your business time and money.

Account Shopping Lists
Create a shared list of products you want your employees to buy from. You can even limit purchases to just the products you select.

Order Approval
When an order is created, an e-mail can be sent to a designated Approver. The Approver logs in to wbm Mason.com to review, edit and approve the order.
Search for the item using the punch-out catalog’s functionality.
1. Locate the appropriate item and enter the **Quantity**
2. Click **Add to Cart**.
Continue to shop and add items to your shopping cart, if needed.
When you are finished shopping and ready to checkout, go to your shopping cart.
Review your order and select **Continue to Checkout.**
You will be returned to your UD Exchange shopping cart

1. Enter a unique shopping **Cart Name** to easily identify or search for your shopping cart. For example: “Gel Pens order from Mason”
Additional Features

• Adding Favorites – generally speaking, punch-out items cannot be saved as favorites because they are accessed on the supplier’s website, unless that supplier offers an option to save the favorite on their website.

• Advanced Search – sometimes punch-out items will return in results from an Advanced Search. This is because those suppliers use “Level Two” punch-outs.
To search for items across all UD hosted catalogs, go to **Shopping > Advanced Search**
Use the **Advanced Search** window to enter criteria for the item you are looking for and click **Search**.
Punch-out catalog results will have a link directly to the item in that supplier’s website, instead of a price as a hosted catalog would show.

In a level two punchout, an item can be saved as a favorite!
If you order the same items frequently, you can click the heart to add it as a favorite.
The **Add Favorite** window will appear.
1. Add any details in the **Edit Item Details** section.
2. Select your destination folder.
3. Click **Save Changes**.

You may have to create a new personal folder the first time you add a favorite.
To find your favorites the next time you shop, go to **Shopping > View Favorites**
Open your folders to view your saved favorites and punch out to that supplier’s website to add them to your cart.
Resources

Procurement Services
procurement@udel.edu
Also see “Shopping Using Hosted Catalogs”