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 all required information has been completed in a Shopping Cart, the menu on the left side of the page will display a green check mark next to the field name.

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 message also displays next to the field missing required information.
To Complete a missing SpeedType:

Click the blue **Required field** link under the SpeedType column in the Accounting Codes section.
Click the blue Select from all values link under the SpeedType column.

Facilities requests can select from Work Order numbers instead!
1. Using the search window, enter search criteria into the Value or Description field.

2. Click Search.
Find the SpeedType you want to use from the list of results. Click the **Select** button.
Click Save.
1. Alternatively, if you have already saved favorite SpeedTypes to your Profile, you can use the Select from your code favorites menu to locate the favorite by its Nickname and select it.

2. Click Save
To Complete a missing **Account Code**:

Click the blue **Required field** link next to Account Code in the **Lines** section.
In the **Edit Line** window, Click the blue **Select from all values** link next to Account Code.
1. In the pop-up window, enter search criteria by Value or Description.
2. Click Search.

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 **Select**.

2. Click Save.

If only one account code matches to that commodity code, it will default and not have to be chosen.
1. A green check mark will indicate that the section is complete.

2. The alerts at the top of the Shopping Cart will be replaced with a message indicating that the order is ready to be placed.
Resources

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