

UNIVERSITY OF DELAWARE **EXCHANGE**

Copying Requisitions to New Shopping Carts

Revised 2/7/2023

Copying Requisitions to New Shopping Carts

- If you regularly order the same items from the same supplier, you can save time when re-ordering by copying one of your previous requisitions to a new cart.
- Please note that copying requisitions is a feature that may **ONLY** be used for *hosted catalog orders, non-catalog orders, or UDX forms (e.g., NPOPs, subawards)*.
- Requisitions **MAY NOT** be copied for *punchout catalog orders*, which rely on external information from the supplier's external website for pricing and availability.
- You can make a copy of **any non-punchout** requisition that you have access to view in UD Exchange. This includes withdrawn, returned or rejected requisitions.



My Orders

Quick Filters

- Supplier**
 - PHILIP ROSENAU COMPANY INC (4)
 - KEEN COMPRESSED GAS COMPANY (1) [Show More](#)
- Department**
 - PROCUREMENT SERVICES (04750) (5)
- Prepared For**
 - Martin, Margot (5)
- Prepared By**
 - Pickering, Kristen (2)
 - Gagnon, Shawn (1)
 - Martin, Margot (1)
 - Requester, Rachel (1) [Show More](#)
- Current Workflow Step**
 - COA Approver (1)
- Approved By**
 - Pickering, Kristen (3)
 - Pickering, Kristen L (1) [Show More](#)
- Commodity Code**
 - 47000000 (Cleaning Equipment & ...)

Submitted Date: All Quick search Add Filter Clear All Filters

Item Type: Hosted Catalog... 1-5 of 5 Results 20 Per Page

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
3270420	PHILIP ROSENAU COMPANY INC	2021-05-18 test1000requester 01	Completed	Margot Martin	5/18/2021 6:33:34 PM	315.30 USD
3222536	PHILIP ROSENAU COMPANY INC	Dade test order 5	Completed	Margot Martin	3/26/2021 10:29:46 AM	308.42 USD
3197790	PHILIP ROSENAU COMPANY INC	Rosenau test 3	Completed	Margot Martin	3/11/2021 2:43:51 PM	284.51 USD
3151035	PHILIP ROSENAU COMPANY INC	Harker Rosenau February	Pending	Margot Martin	1/13/2021 11:08:14 AM	242.01 USD
2997250	KEEN COMPRESSED GAS COMPANY	Martin Lab Gas July	Completed	Margot Martin	7/9/2020 7:50:52 AM	211.20 USD

From any requisition search screen, find the requisition you want to copy and click on the requisition number to open it.

Requisition • 2997250

Summary Comments Attachments History

General	Shipping	Billing
<p>Status ✓ Completed <small>(7/9/2020 10:03 PM)</small></p> <p>Submitted 7/9/2020 7:50 AM</p> <p>Cart Name Martin Lab Gas July</p> <p>Description <i>no value</i></p> <p>Priority Normal</p> <p>Prepared by Shawn Gagnon</p> <p>Prepared for Margot Martin</p> <p>Purchasing Business Unit UOD01 UNIVERSITY OF DELAWARE</p> <p>Payment Term Override ✗</p> <p>eBuilder Process Instance <i>no value</i></p> <p>Multi-Invoice/Payment ✗</p>	<p>Ship To</p> <p><small>Values vary by line.</small></p> <p>University of Delaware Attn: Margot Martin Room: Front Desk 164 SOUTH COLLEGE AVENUE 164 S COLLEGE AVE</p> <p>Ship Via Best Carrier-Best Way</p> <p>Requested Delivery Date <i>no value</i></p>	<p>Bill To</p> <p>Accounts Payable accountspayable@udel.edu 222 South Chapel Street Newark, DE 19716 United States</p>

Click the **ellipsis** to display the actions menu.

Select **Copy to New Cart**.

- Copy to New Cart
- Add Comment
- Add Notes to History
- View My Orders (Last 90 Days)
- Continue Shopping
- View Carts
- View Cart return message(s)
- See configuration for this requisition

Buyer Information

Buyer Information
<p>Buyer Name <i>no value</i></p> <p>Buyer Email <i>no value</i></p> <p>Buyer Phone <i>no value</i></p>

Total (211.20 USD)
Shipping, Handling, and T each supplier. The values budget checking, and wo
Subtotal

Voucher: I0000227

What's next?

Workflow 📄 🗑️

Show skipped steps

✓ **Submitted**
7/9/2020 7:50 AM
Shawn Gagnon
On behalf of: Margot Martin

Start - Parallel Steps

✓ **PR Validation**
Completed



Shopping Cart • Shopping Cart

Assign Cart Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name My Cart's Name

Name your new cart.

Description

Multi-Invoice/Payment

After-The-Fact Purchase

Waiver of Bid

3 Items

KEEN COMPRESSED GAS COMPANY • 3 Items • 211.20 USD

SUPPLIER DETAILS

Contract no value PO Number

Quote number

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 HELIUM 200 U (1)	HEL HE2	CYL	140.00	1 CYL	140.00

Details

For Margot Martin

Total (211.20 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal *	211.20
Total *	211.20



3 Items

KEEN COMPRESSED GAS CO

SUPPLIER DETAILS

Contract *no value*

Quote number

- Scroll down to the line level to make any necessary edits in available fields.
- Select **Proceed to Checkout** to complete your new requisition.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1 HELIUM 200 U (1)	HEL HE2	CYL	140.00	1 CYL	140.00	...
ITEM DETAILS						
Manufacturer Name	Keen Compressed Gas Co	Contract:	Select price or contract...		Internal Note/Business Justification	
Manufacturer Part Number	HEL HE2	Commodity Code	12000000	Chemicals, Bio Chemicals & Gas Materials	1000 characters remaining	expand clear
UNSPSC	12-14-19-00	more info...		External Note	1000 characters remaining	expand clear
		PO Type Override	<input type="checkbox"/>			
2 ACETYLENE #3 U (3)	ACE AC3	CYL	57.20	1 CYL	57.20	...
ITEM DETAILS						
Manufacturer Name	Keen Compressed Gas Co	Contract:	Select price or contract...		Internal Note/Business Justification	
Manufacturer Part	ACE AC3	Commodity Code	12000000			

Tax charges are calculated and charged by... as shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal * **211.20**

Total * **211.20**

Requisition • 3703294

Summary PO Preview Comments Attachments History

Buyer Information

Buyer Information

Buyer Name	Buyer Email	Buyer Phone
no value	no value	no value

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID	Project Type 1	User Ref	Cost Share Project	Project Type 2
N/A	PURC110000	PURC110000	OPBAS	04750	ADALL	no value	no value	no value	no value	no value	no value
N/A	R/E PROCUREMENT SERVICES	R/E PROCUREMENT SERVICES	OPERATING BASIC	PROCUREMENT SERVICES	ADMINISTRATIVE ALLOWABLE						



Internal Notes and Attachments

- Internal Note/Business Justification
- Internal Attachments
- Sourcing
- Sourcing Status
- Sourcing Event Title
- Sourcing Est. Award Amount
- Sourcing Award Date

- When completing the details of your new draft requisition, **always** be sure to update your Purpose Code entry, even if you are using the same one from the copied requisition.
- Click on the **Pencil icon** in the **Accounting Codes** section to edit.

3 Items

Draft

Be aware of these issues.
You may review and proceed.

Total (211.20 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	211.20
	211.20

What's next for my order?

COA Approver
Walueff, George

COA Approver
Future

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE All Search (Alt+Q) 211.20 USD

Edit Accounting Codes

Accounting Codes

Work Order Number	SpeedType *	Purpose	Fund	Dept	Program	Source	Project ID
N/A	PURC110000	PURC110000 - PROCUREMENT SERVICES	OPBAS - OPERATING BASIC	04750 - PROCUREMENT SERVICES	ADALL - ADMINISTRATIVE ALLOWABLE	No Value	No Value

★ Required fields Save Close

- In the Edit Accounting Codes pop-up, enter the Purpose Code you want to use.
- If you are using the same code as the copied requisition, you will need to delete the Purpose Code and re-enter it.
- By updating the Purpose Code, even if you are simply deleting and re-entering the same code, you are ensuring that any change or updates made to the related SpeedType will be current.
- If the Purpose Code is not “refreshed” in this way and changes have been made to the related SpeedType in PeopleSoft, the requisition will fail PR validation when submitted, and will be returned to you by the system.



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Enhanced Order Search](#)
- [Adding Financial Information to Requisitions](#)
- [Auto-Return Troubleshooting Tips](#)

