

Preparing a Non-Catalog Request FOR SHOPPERS

Revised 5/23/2023



Preparing a Non-Catalog Requisition

- Non-catalog shopping refers to UDX purchases where hosted and punch-out catalogs are not used.
- 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: Just because a supplier does not have a catalog in UDX does not always
 mean that you will need to obtain a quote, have them register as a supplier in
 UDX, and complete a non-catalog order. UD employees can still purchase goods
 (not services) outside of UDX with their UD Credit Cards when the amount of the
 purchase is within the cardholder's dollar limit.





As a Shopper in UD Exchange:

- You can **prepare** your own orders.
- Employees with the Shopper role can **prepare** their own orders but will have to **assign** their orders to a Requester to review and submit them on their behalf.
- A Shopper can assign their order to a Requester while it is still a Shopping Cart or after they have clicked Proceed to Checkout to create their draft requisition.
- Business processes may vary by department/business unit. Some departments might expect
 Shoppers to complete all required information on a draft requisition before assigning it to a
 Requester while others might instruct their Shoppers to only complete basic cart information
 and add necessary attachments prior to assigning the order to a Requester who will complete
 the financial details.
- This guide will illustrate how to prepare your own requisitions and assign them to a Requester.







Cassidy Painting Inc.

Before beginning your order in UDX, review the quote you received from the supplier.

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

TO. Wark Colden

Company: University of Delaware

Email/Fax: WO#1041012 ACCT# MAIN175336

Project: Morris Library and Robinson Hall

BID AMOUNT: See Below

Remarks/Clarifications:

Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows \$6,800.00

Morris Library: Power wash all sides of the building to remove dirt and mildew \$17.850.00

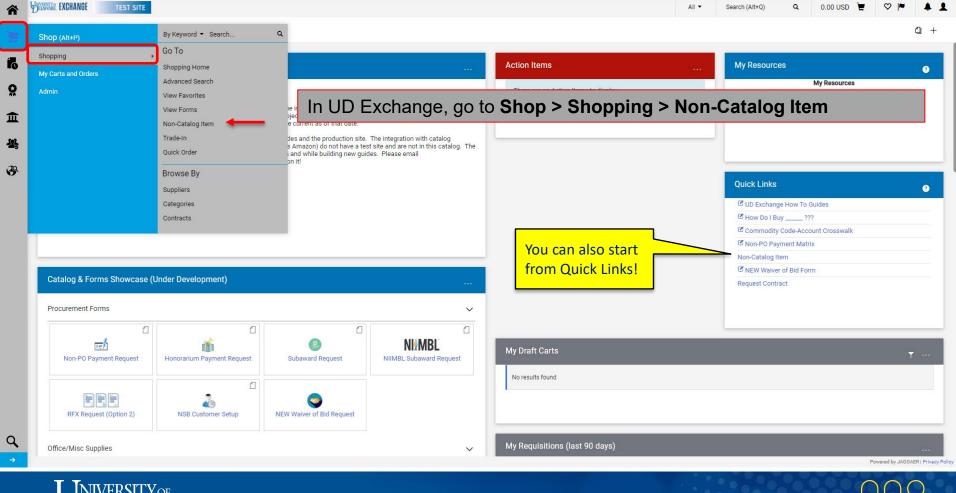
The quoted amount reflects the project conditions as presented at the time of pricing. Unforeseen field conditions will require a review of the quoted amount and must be addressed prior to the work continuing.

Not included: Wage rates, bond cost, floor coating or sealers, painting of exposed floor, staining of wood doors, p-lam finishes, caulking of cabinets and millwork, wall protection and accessories, wall coverings, plates or weekends.

It's preferred but not required to separately list out all items if they are the same commodity (e.g., building materials). However, it IS important to separate goods from services. It is also important to separate tagged equipment items.

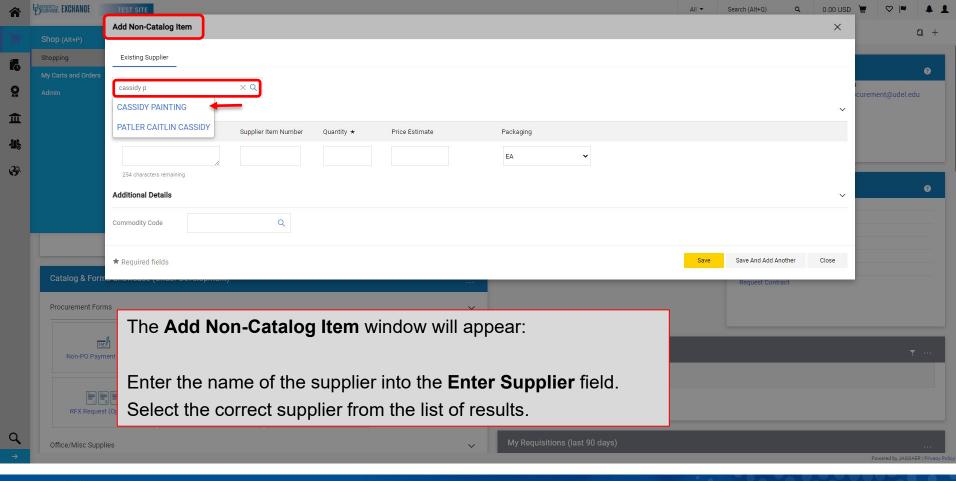






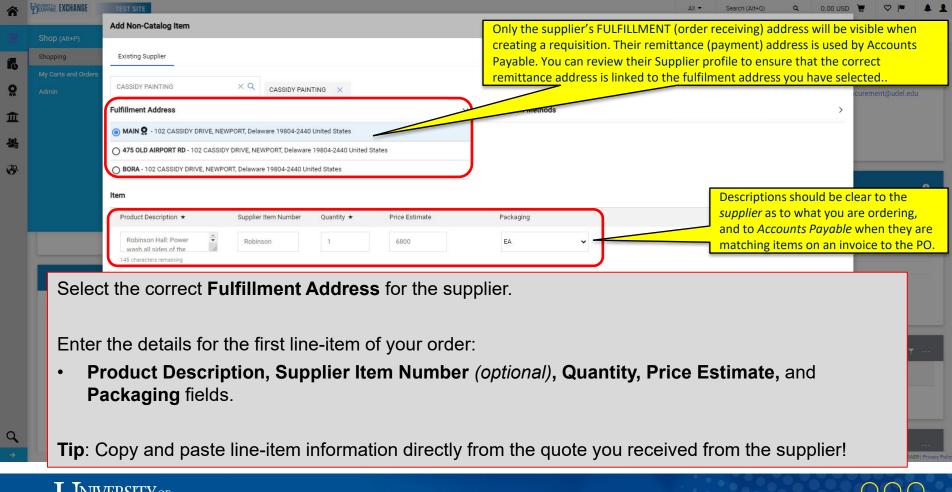






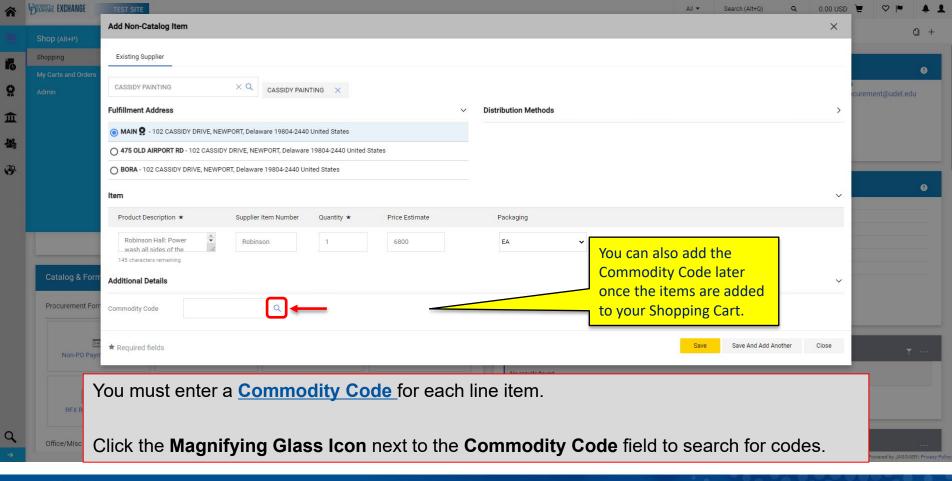




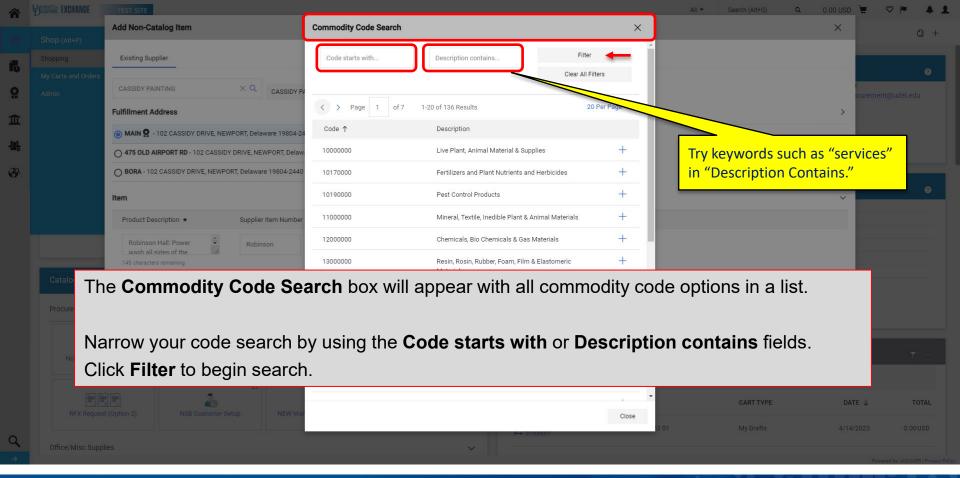






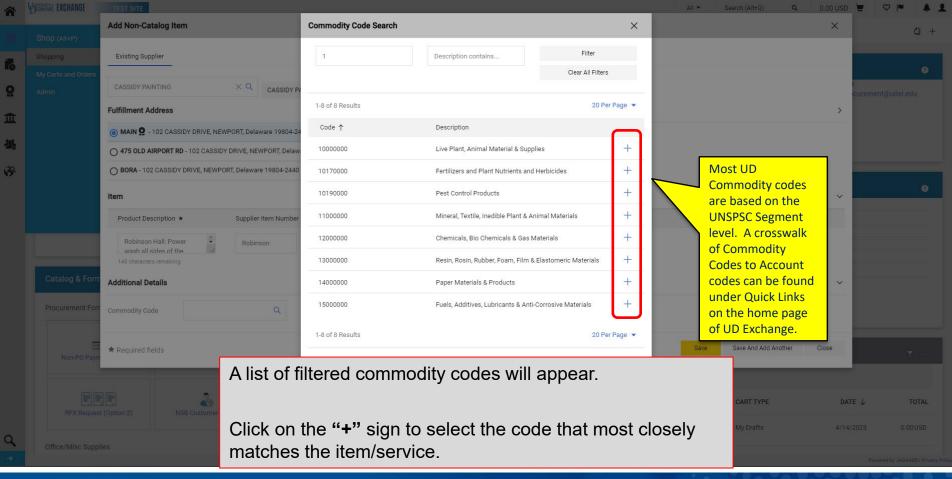






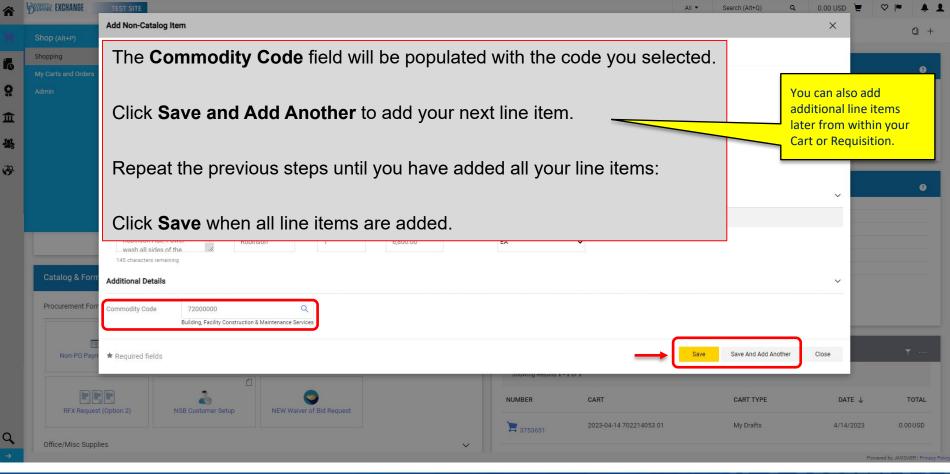






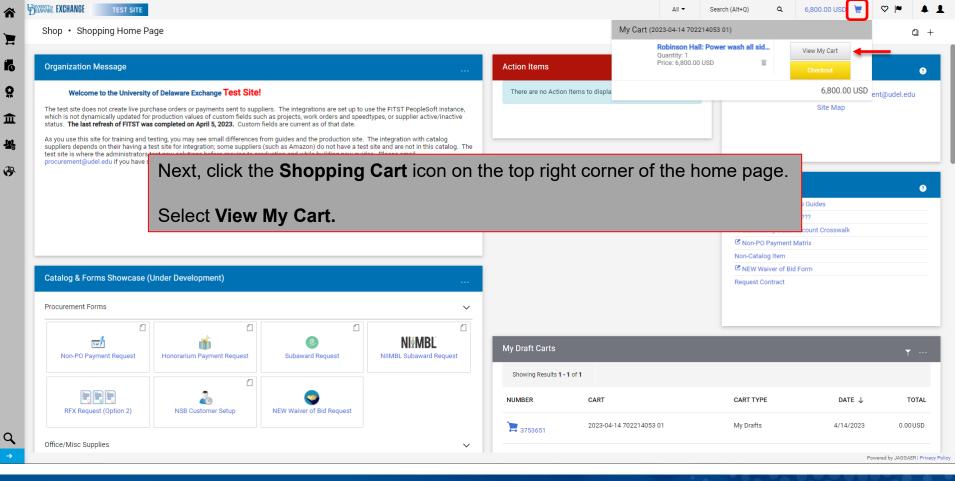






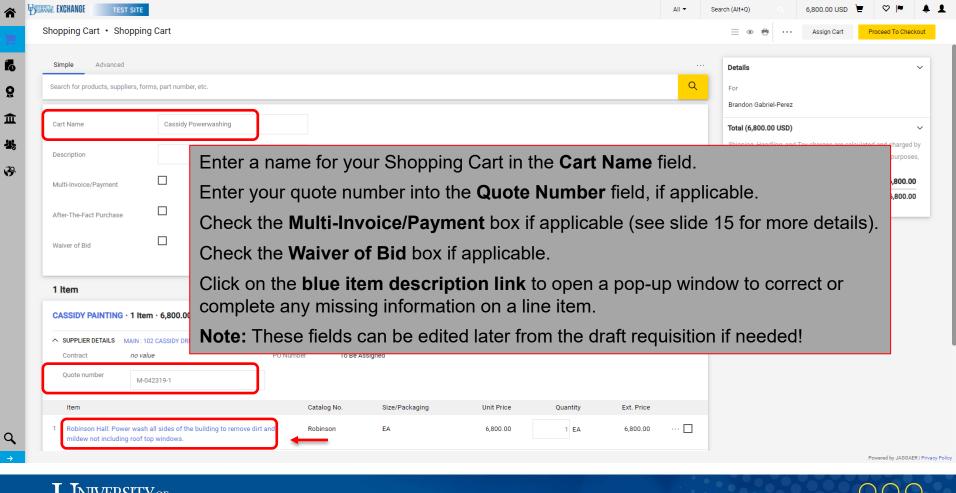






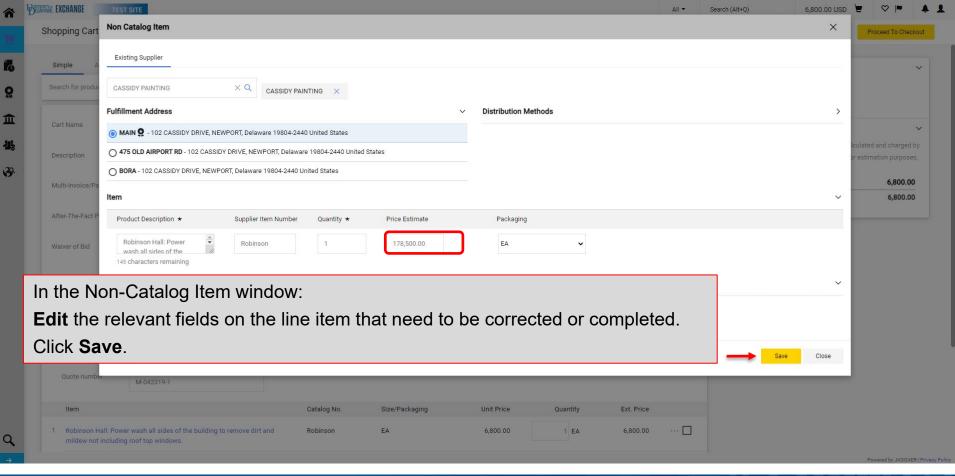






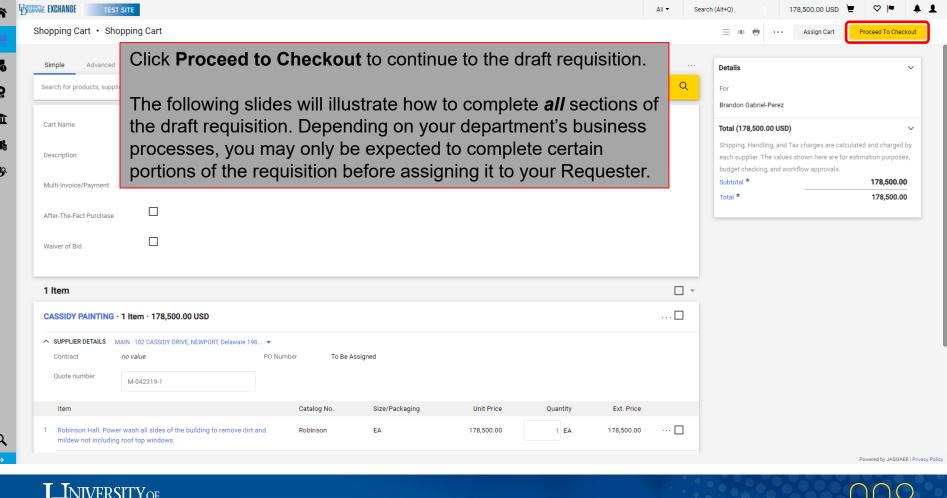






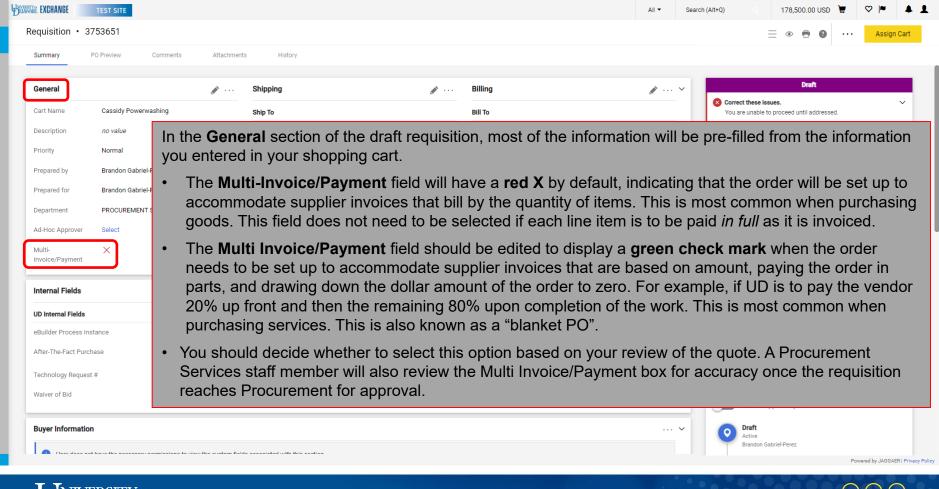






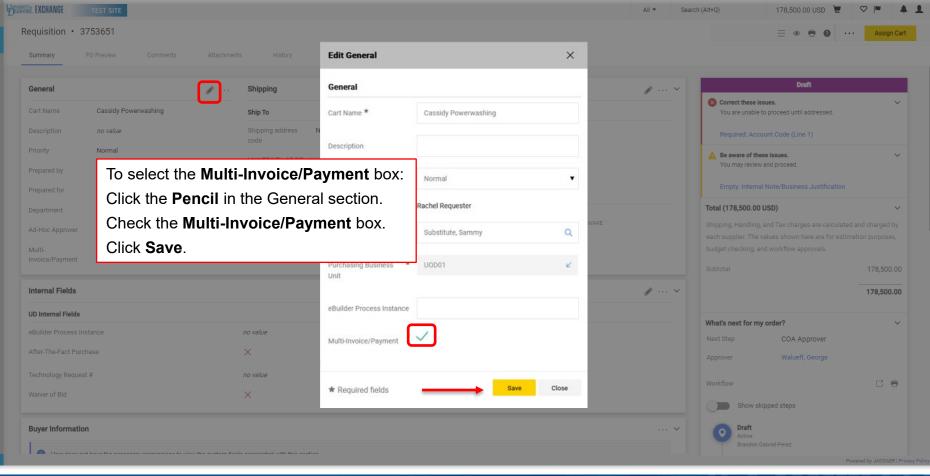






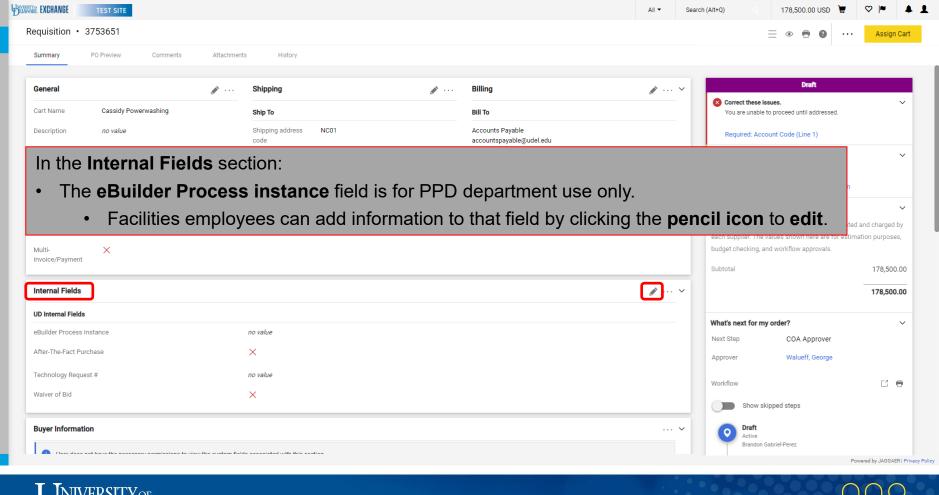






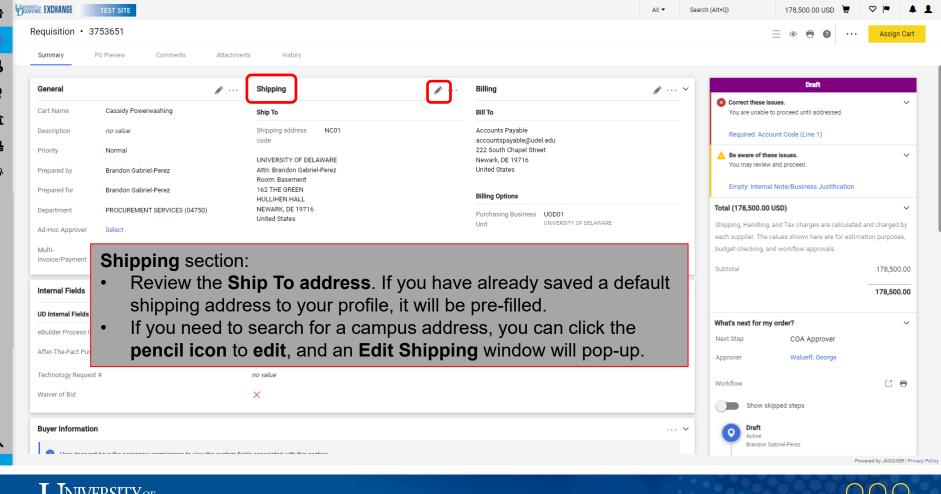






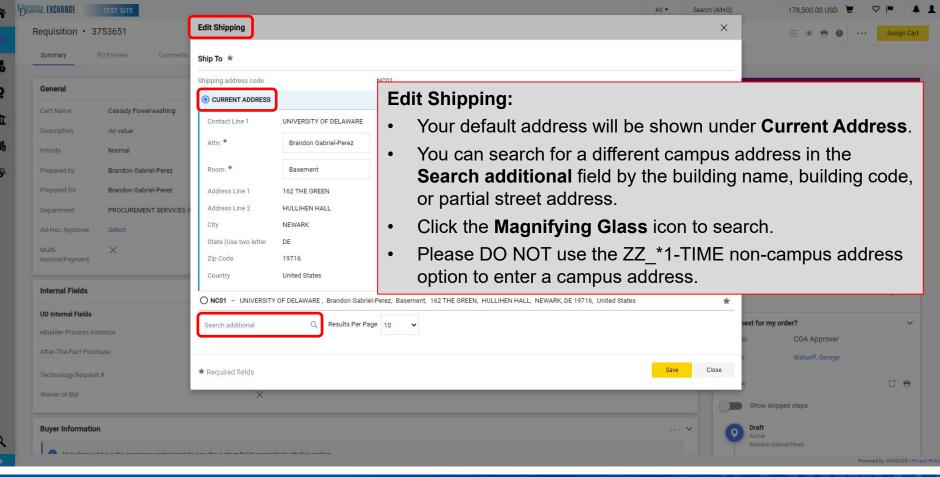






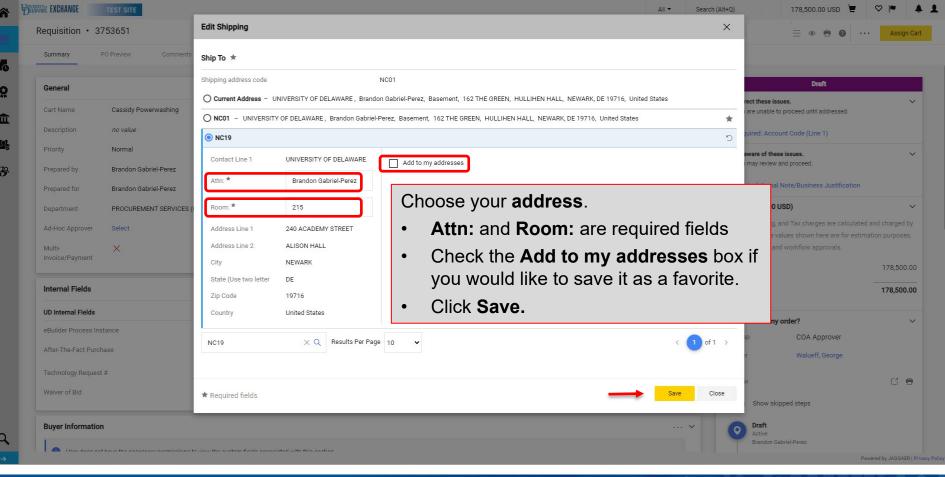






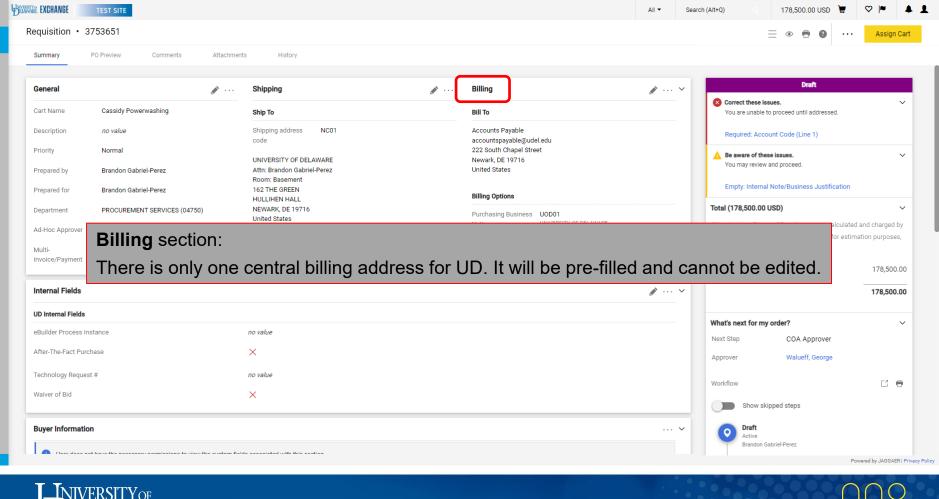






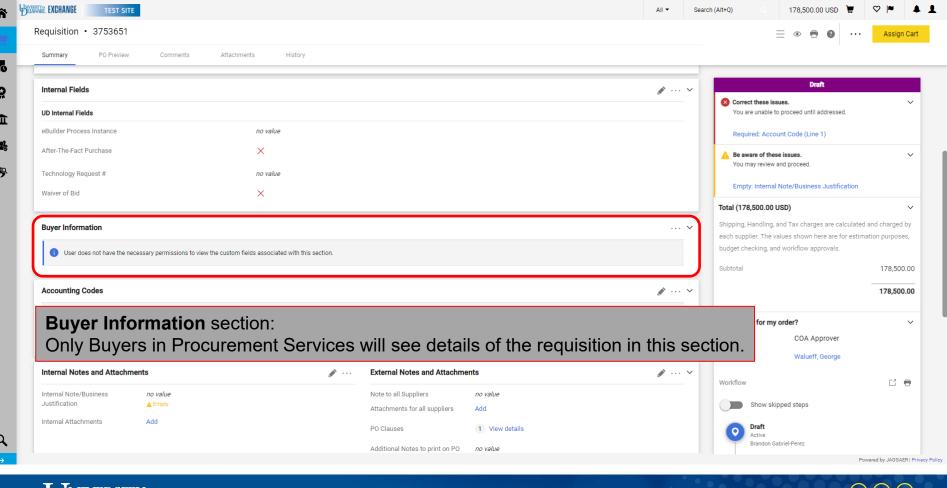






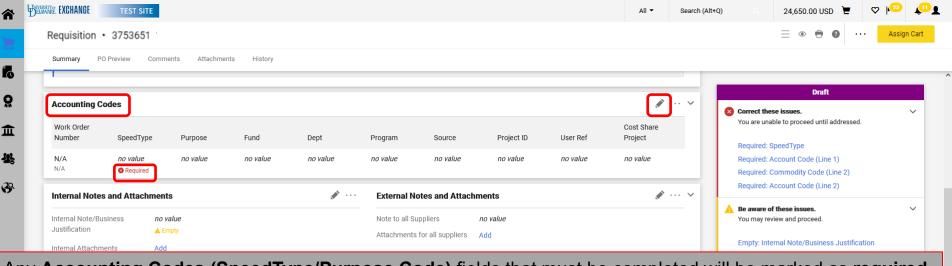








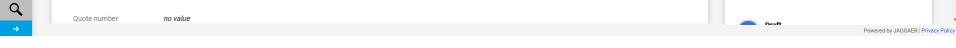




Any **Accounting Codes** (SpeedType/Purpose Code) fields that must be completed will be marked as required. Shoppers may wish to leave this section for Requesters to complete.

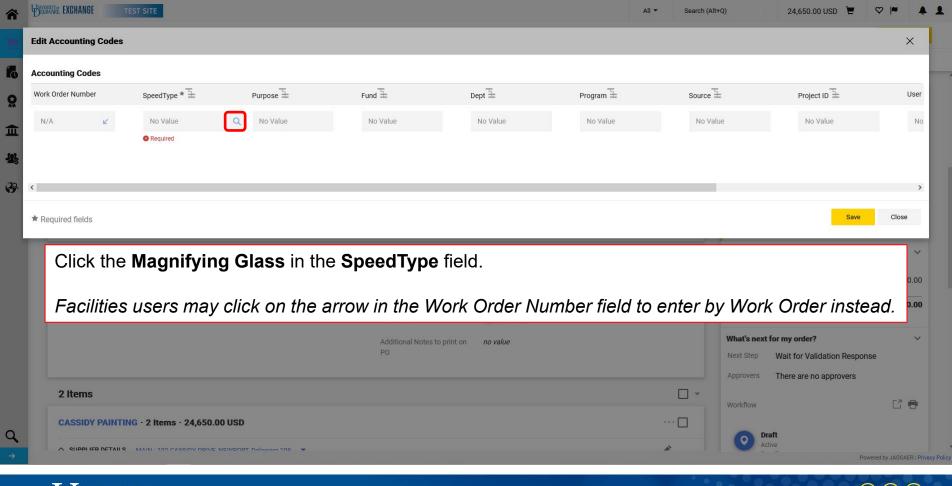
To edit the Accounting Codes section, click the Pencil.

Note that you will **not** enter your 6-digit UD account codes here in the header of the draft requisition. They will be entered on the item line(s) since they are associated with the commodity code(s).



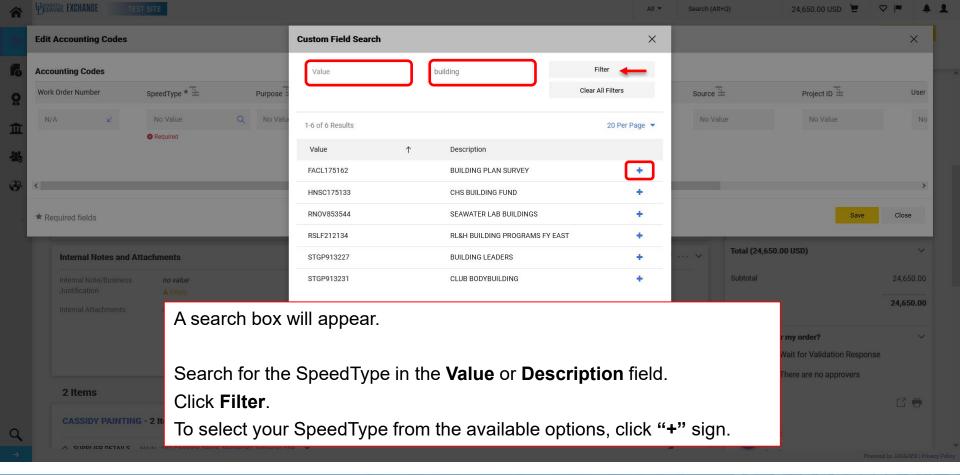






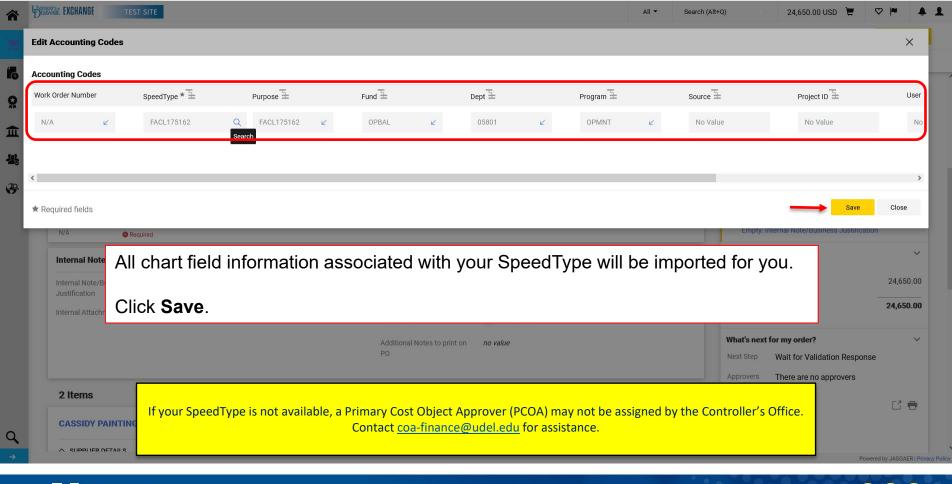






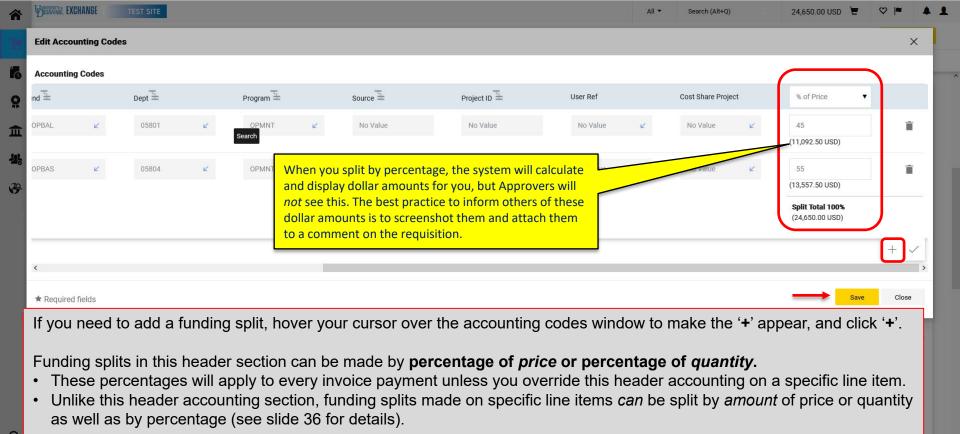






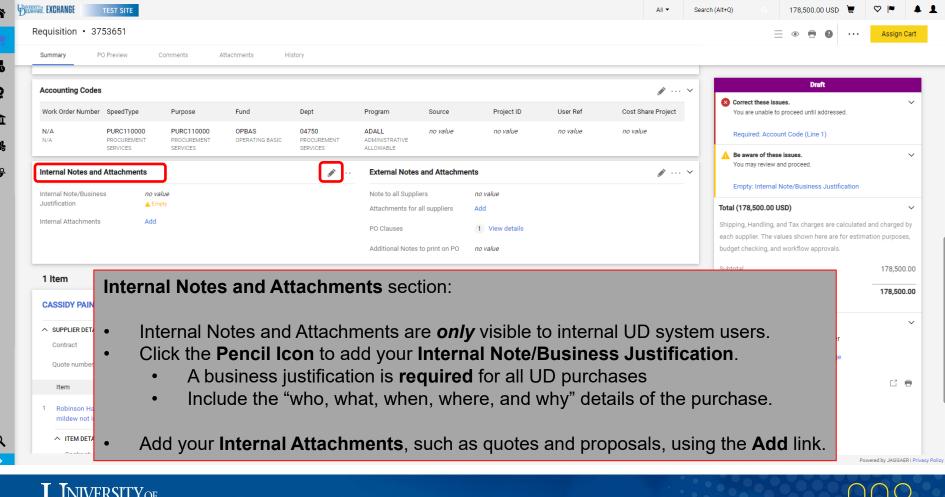






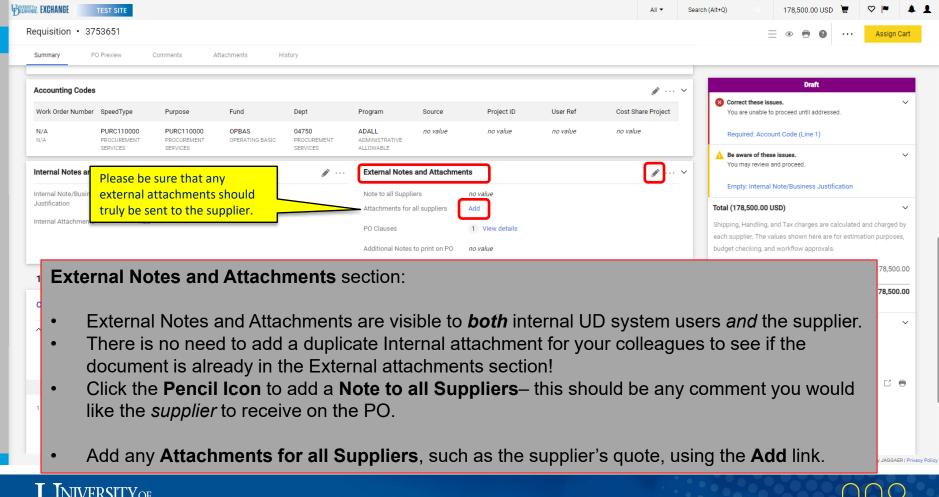


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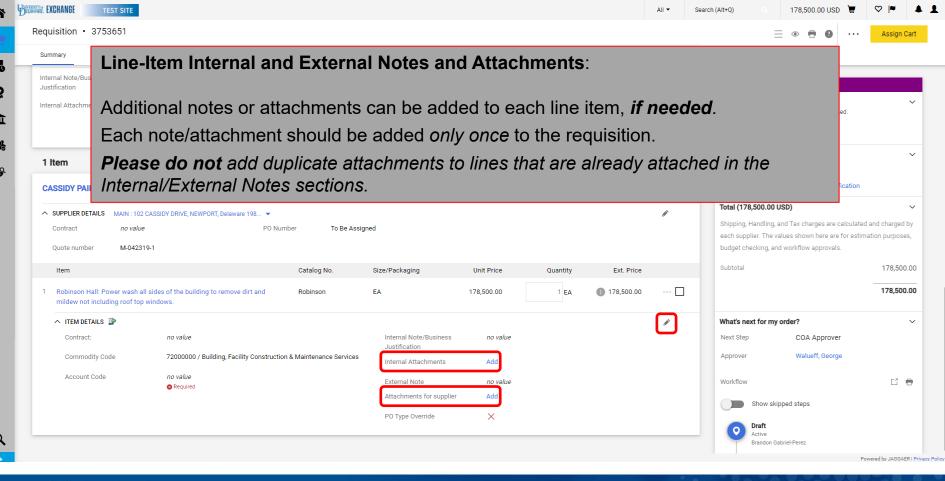






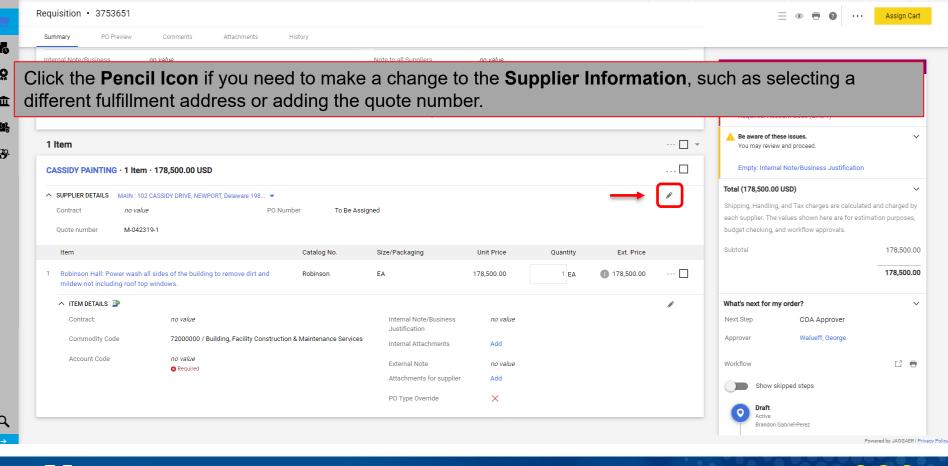










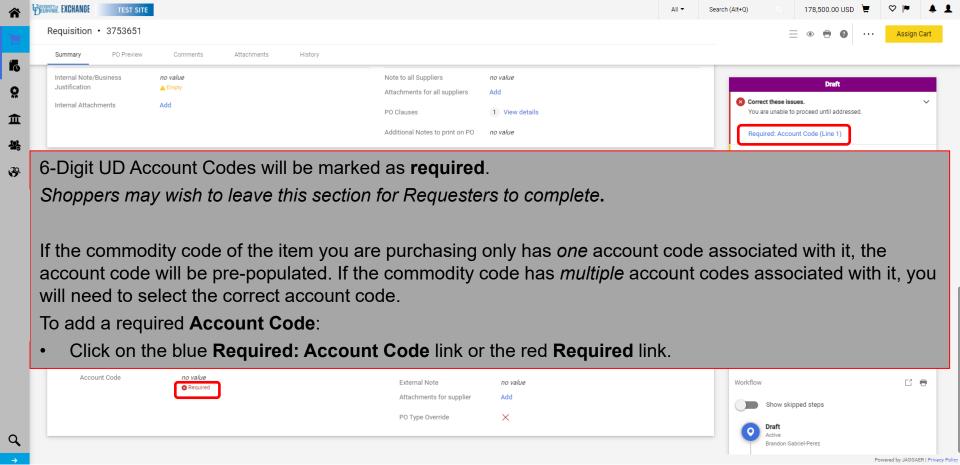




WELLANGE EXCHANGE

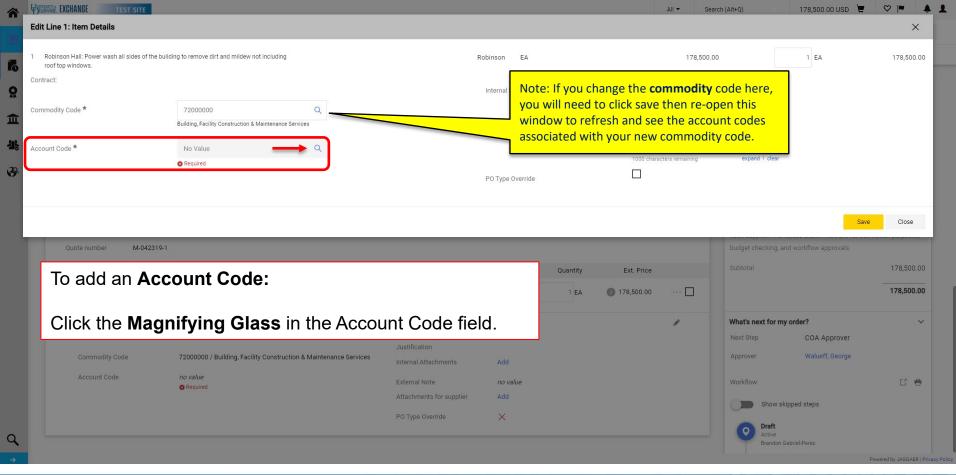
TEST SITE

Search (Alt+0)



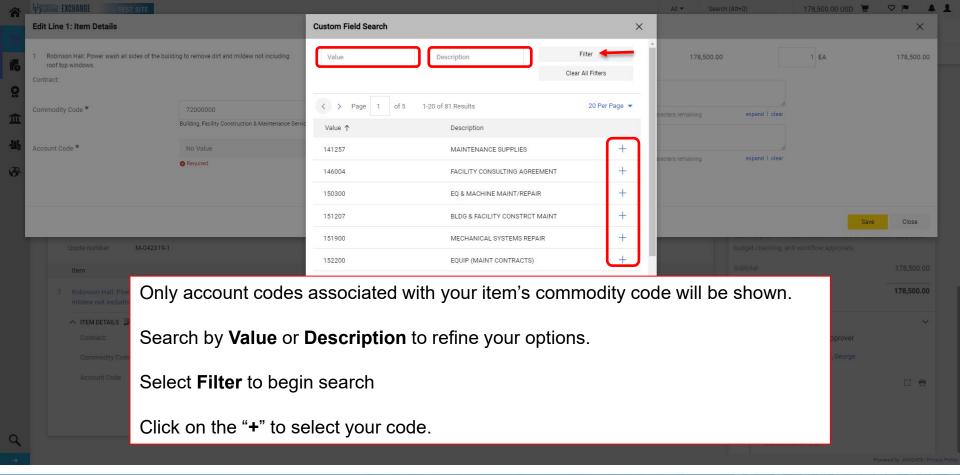






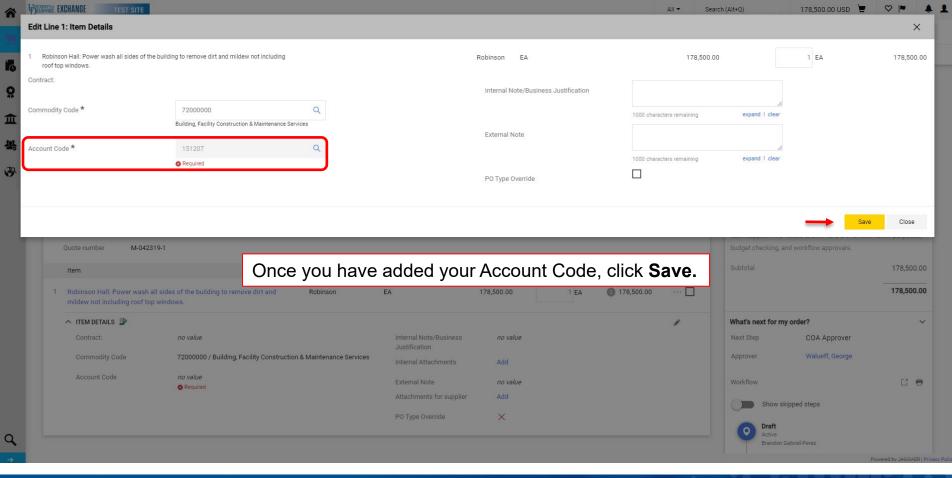






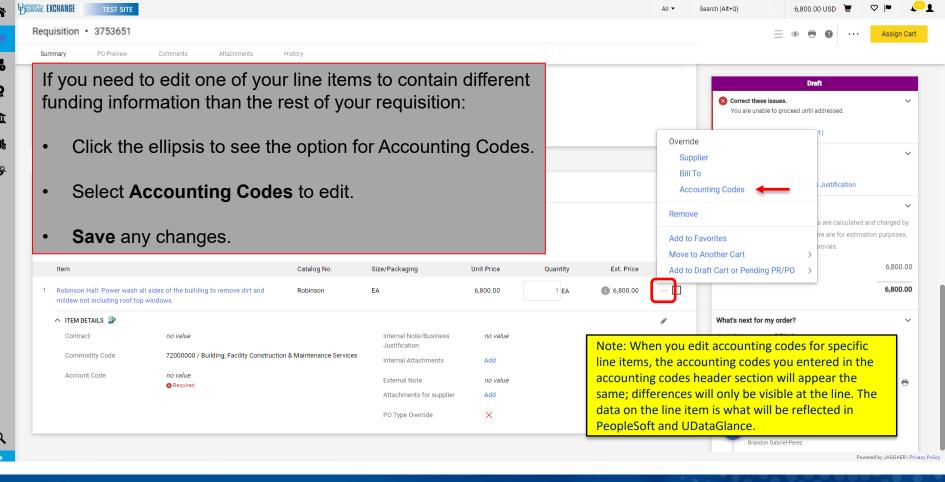






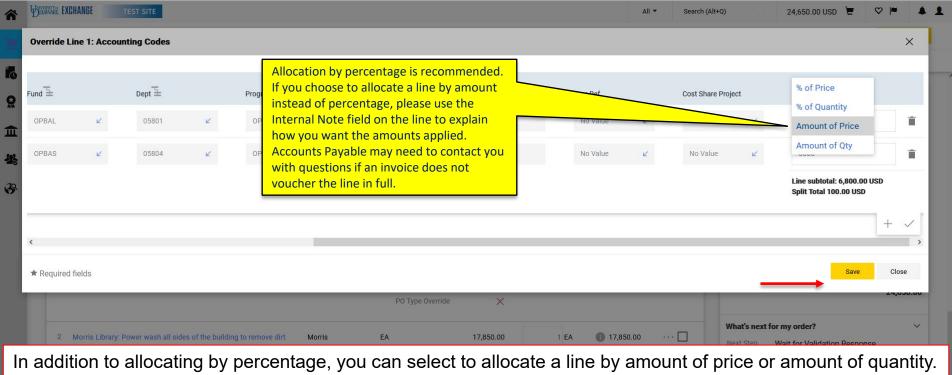










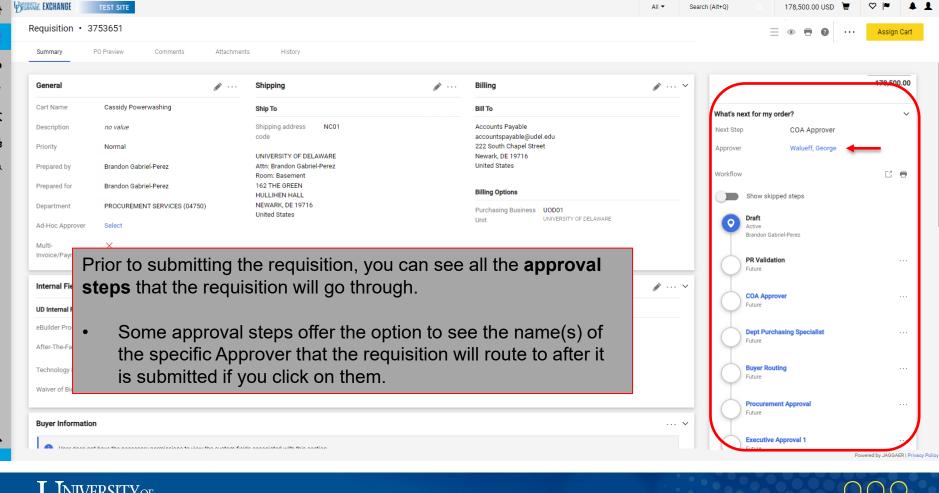


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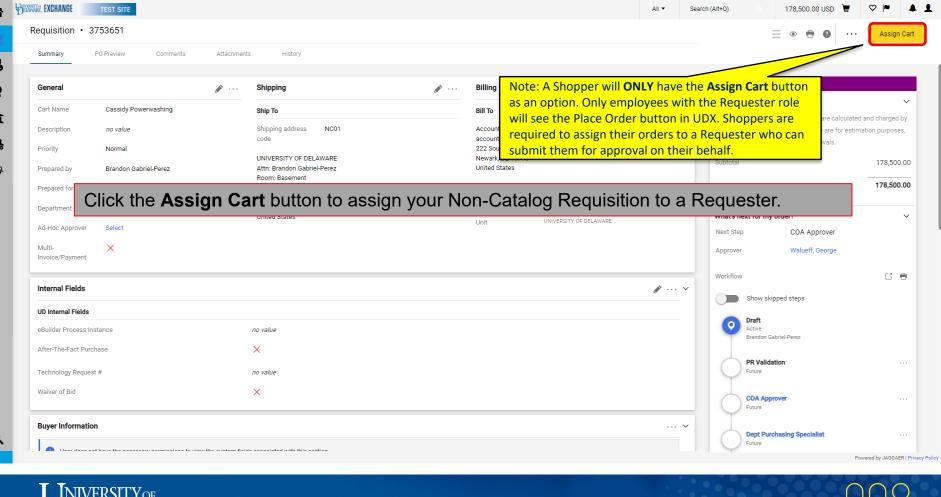






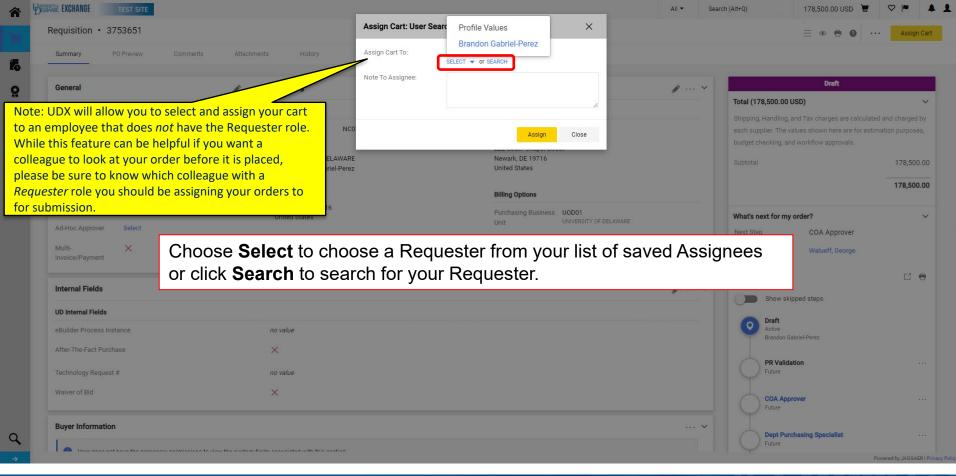






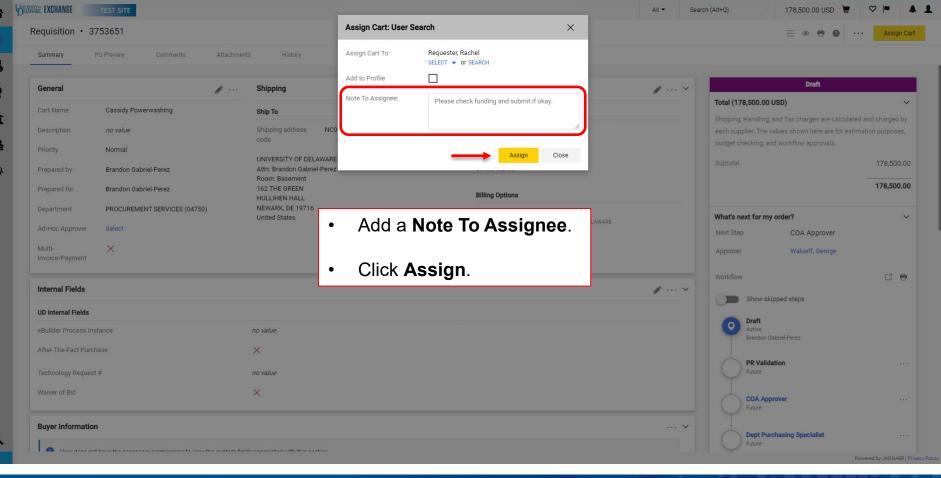


















You will receive confirmation that your cart has been assigned.

Options

Create new draft cart

Return to your home page

Recent orders



Cart Assigned

3753651

Cassidy Powerwashing

178,500.00 USD

Requisition Summary

Requisition number

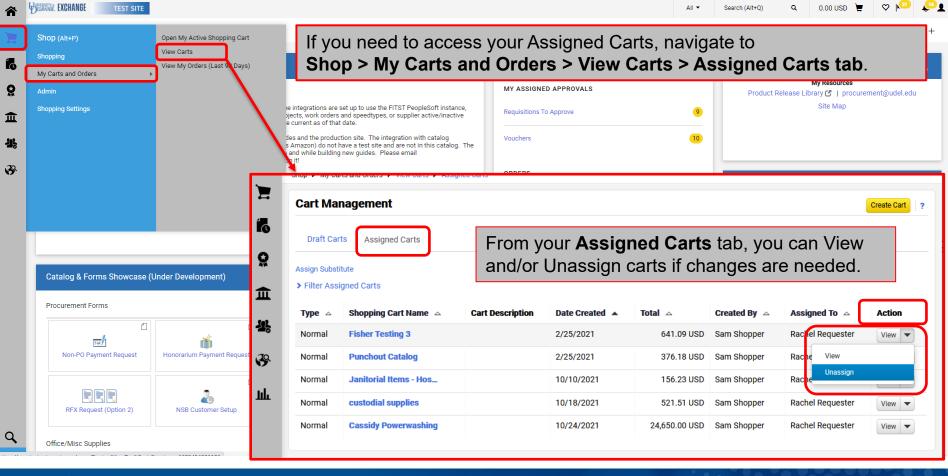
Requisition total

Number of line items

Cart name



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Questions:

• procurement@udel.edu

Resources:

- Procurement Services Website
- Submitting a Non-Catalog Request for Requesters
- <u>Finding Suppliers and Supplier Information</u>
- Assigning Shopping Carts
- Adding Details to Shopping Carts
- Adding Financial Information to Requisitions



