



Preparing and Submitting a Non-Catalog Request

FOR REQUESTERS

Revised 5/30/2023



Preparing and Submitting 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 Requester in UD Exchange:

- You can **prepare *and* submit** your own orders.
- Employees with just the Shopper role can **prepare** their own orders but will have to **assign** their orders to you as a Requester to review and submit them on their behalf.
- A Shopper can assign their order to you 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 as well as complete requisitions for Shoppers.



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.

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, nights 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.

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

By Keyword Search...

Go To

Shopping Home

Advanced Search

View Favorites

View Forms

Non-Catalog Item

Trade-In

Quick Order

Browse By

Suppliers

Categories

Contracts

In UD Exchange, go to **Shop > Shopping > Non-Catalog Item**

You can also start from Quick Links!

Quick Links

[UD Exchange How To Guides](#)

[How Do I Buy _____ ???](#)

[Commodity Code-Account Crosswalk](#)

[Non-PO Payment Matrix](#)

[Non-Catalog Item](#)

[NEW Waiver of Bid Form](#)

[Request Contract](#)

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

Honorarium Payment Request

Subaward Request

NIIMBL Subaward Request

RFX Request (Option 2)

NSB Customer Setup

NEW Waiver of Bid Request

Office/Misc Supplies

My Draft Carts

No results found

My Requisitions (last 90 days)

Add Non-Catalog Item

Existing Supplier

cassidy p

CASSIDY PAINTING

PATLER CAITLIN CASSIDY

Supplier Item Number

Quantity *

Price Estimate

Packaging

EA

254 characters remaining

Additional Details

Commodity Code

★ Required fields

Save

Save And Add Another

Close

The **Add Non-Catalog Item** window will appear:

Enter the name of the supplier into the **Enter Supplier** field.
Select the correct supplier from the list of results.

TEST SITE

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

Add Non-Catalog Item

Existing Supplier

CASSIDY PAINTING

CASSIDY PAINTING

Fulfillment Address

☒ **MAIN** - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

☐ 475 OLD AIRPORT RD - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

☐ BORA - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

Item

| Product Description ★ | Supplier Item Number | Quantity ★ | Price Estimate | Packaging |
|--|----------------------|------------|----------------|-----------|
| Robinson Hall: Power wash all sides of the 145 characters remaining | Robinson | 1 | 6800 | EA |

Only the supplier's FULFILLMENT (order receiving) address will be visible when creating a requisition. Their remittance (payment) address is used by Accounts Payable. You can review their Supplier profile to ensure that the correct remittance address is linked to the fulfilment address you have selected..

Descriptions should be clear to the *supplier* as to what you are ordering, and to *Accounts Payable* when they are matching items on an invoice to the PO.

Select the correct **Fulfillment Address** for the supplier.

Enter the details for the first line-item of your order:

- **Product Description, Supplier Item Number** (*optional*), **Quantity, Price Estimate,** and **Packaging** fields.

Tip: Copy and paste line-item information directly from the quote you received from the supplier!

TEST SITE

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

Catalog & Form

Procurement Form

Non-PO Paym

RFX R

Office/Misc

Add Non-Catalog Item

Existing Supplier

CASSIDY PAINTING

CASSIDY PAINTING

Fulfillment Address

☒ **MAIN** - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

☐ **475 OLD AIRPORT RD** - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

☐ **BORA** - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

Distribution Methods

Item

| Product Description * | Supplier Item Number | Quantity * | Price Estimate | Packaging |
|--|----------------------|------------|----------------|-----------|
| Robinson Hall: Power wash all sides of the 145 characters remaining | Robinson | 1 | 6800 | EA |

Additional Details

Commodity Code

★ Required fields

Save Save And Add Another Close

You can also add the Commodity Code later once the items are added to your Shopping Cart.

You must enter a [Commodity Code](#) for each line item.

Click the **Magnifying Glass** in the **Commodity Code** field to search for codes.

TEST SITE

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

Existing Supplier

CASSIDY PAINTING

Fulfillment Address

MAIN - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440

475 OLD AIRPORT RD - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440

BORA - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440

Item

Product Description *

Robinson Hall: Power wash all sides of the

Supplier Item Number

Robinson

145 characters remaining

Commodity Code Search

Code starts with...

Description contains...

Filter

Clear All Filters

Page 1 of 7 1-20 of 136 Results 20 Per Page

| Code ↑ | Description |
|----------|---|
| 10000000 | Live Plant, Animal Material & Supplies |
| 10170000 | Fertilizers and Plant Nutrients and Herbicides |
| 10190000 | Pest Control Products |
| 11000000 | Mineral, Textile, Inedible Plant & Animal Materials |
| 12000000 | Chemicals, Bio Chemicals & Gas Materials |
| 13000000 | Resin, Rosin, Rubber, Foam, Film & Elastomeric |

Try keywords such as “services” in “Description Contains.”

The **Commodity Code Search** box will appear with all commodity code options in a list.

Narrow your code search by using the **Code starts with** or **Description contains** fields.
Click **Filter** to search.



TEST SITE

Shop (Alt+P)

Shopping

My Carts and Orders

Admin

Catalog & Form

Procurement Form

Non-PQ Payment

Office/Misc Supplies

Existing Supplier

CASSIDY PAINTING

Fulfillment Address

MAIN - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440

475 OLD AIRPORT RD - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440

BORA - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440

Item

Product Description *

Robinson Hall: Power wash all sides of the building

Supplier Item Number

Robinson

Additional Details

Commodity Code

★ Required fields

RFX Request (Option 2)

NSB Customer

Commodity Code Search

1

Description contains...

Filter

Clear All Filters

1-8 of 8 Results

20 Per Page

| Code ↑ | Description | |
|----------|--|---|
| 10000000 | Live Plant, Animal Material & Supplies | + |
| 10170000 | Fertilizers and Plant Nutrients and Herbicides | + |
| 10190000 | Pest Control Products | + |
| 11000000 | Mineral, Textile, Inedible Plant & Animal Materials | + |
| 12000000 | Chemicals, Bio Chemicals & Gas Materials | + |
| 13000000 | Resin, Rosin, Rubber, Foam, Film & Elastomeric Materials | + |
| 14000000 | Paper Materials & Products | + |
| 15000000 | Fuels, Additives, Lubricants & Anti-Corrosive Materials | + |

1-8 of 8 Results

20 Per Page

Save

Save And Add Another

Close

CART TYPE

DATE ↓

TOTAL

My Drafts

4/14/2023

0.00USD

Powered by JAGGAER | Privacy Policy

Most UD Commodity codes are based on the UNSPSC Segment level. A crosswalk of Commodity Codes to Account codes can be found under Quick Links on the home page of UD Exchange.

A list of filtered commodity codes will appear.

Click on the “+” sign to select the code that most closely matches the item/service.

Add Non-Catalog Item

The **Commodity Code** field will be populated with the code you selected.

Click **Save and Add Another** to add your next line item.

Repeat the previous steps until you have added all your line items:

Click **Save** when all line items are added.

You can also add additional line items later from within your Cart or Requisition.

Additional Details

Commodity Code 72000000
Building, Facility Construction & Maintenance Services

★ Required fields

Save

Save And Add Another

Close

| NUMBER | CART | CART TYPE | DATE ↓ | TOTAL |
|---------|-------------------------|-----------|-----------|---------|
| 3753651 | 2023-04-14 702214053 01 | My Drafts | 4/14/2023 | 0.00USD |

Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

The test site does not create live purchase orders or payments sent to suppliers. The integrations are set up to use the FITST PeopleSoft instance, which is not dynamically updated for production values of custom fields such as projects, work orders and speedtypes, or supplier active/inactive status. **The last refresh of FITST was completed on April 5, 2023.** Custom fields are current as of that date.

As you use this site for training and testing, you may see small differences from guides and the production site. The integration with catalog suppliers depends on their having a test site for integration; some suppliers (such as Amazon) do not have a test site and are not in this catalog. The test site is where the administrator procurement@udel.edu if you have

Action Items

There are no Action Items to display

My Cart (2023-04-14 702214053 01)

Robinson Hall: Power wash all sid...

Quantity: 1

Price: 6,800.00 USD

View My Cart

Checkout

6,800.00 USD

Site Map

ent@udel.edu

Next, click the **Shopping Cart** icon on the top right corner of the home page.

Select **View My Cart**.

Catalog & Forms Showcase (Under Development)

Procurement Forms

Non-PO Payment Request

Honorarium Payment Request

Subaward Request

NIIMBL
NIIMBL Subaward Request

RFX Request (Option 2)


NSB Customer Setup

NEW Waiver of Bid Request

Office/Misc Supplies

My Draft Carts

Showing Results 1 - 1 of 1

| NUMBER | CART | CART TYPE | DATE ↓ | TOTAL |
|---|-------------------------|-----------|-----------|----------|
|  3753651 | 2023-04-14 702214053 01 | My Drafts | 4/14/2023 | 0.00 USD |



Simple

Advanced

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

Cart Name

Cassidy Powerwashing

Description

Multi-Invoice/Payment

☐

After-The-Fact Purchase

☐

Waiver of Bid

☐

1 Item

CASSIDY PAINTING - 1 Item - 6,800.00

SUPPLIER DETAILS

MAIN : 102 CASSIDY DR

Contract

no value

Quote number

M-042319-1

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price | |
|---|-------------|----------------|------------|----------|------------|-----------------------------------|
| 1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. | Robinson | EA | 6,800.00 | 1 EA | 6,800.00 | <div><div></div><div></div></div> |

Details

For

Brandon Gabriel-Perez

Total (6,800.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by purposes.

6,800.00

6,800.00

Enter a name for your Shopping Cart in the **Cart Name** field.

Enter your quote number into the **Quote Number** field, if applicable.

Check the **Multi-Invoice/Payment** box if applicable (see slide 15 for more details).

Check the **Waiver of Bid** box if applicable.

Click on the **blue item description link** to open a pop-up window to correct or complete any missing information on a line item.

Note: These fields can be edited later from the draft requisition if needed!



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

6,800.00 USD

Search (Alt+Q)

All

Shopping Cart

Simple

Search for products

Cart Name

Description

Multi-Invoice/Payment

After-The-Fact Payment

Waiver of Bid

Non Catalog Item

Existing Supplier

CASSIDY PAINTING

CASSIDY PAINTING

Fulfillment Address

MAIN - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

475 OLD AIRPORT RD - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

BORA - 102 CASSIDY DRIVE, NEWPORT, Delaware 19804-2440 United States

Distribution Methods

Item

| Product Description * | Supplier Item Number | Quantity * | Price Estimate | Packaging |
|---|----------------------|------------|----------------|-----------|
| Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. 145 characters remaining | Robinson | 1 | 178,500.00 | EA |

Save

Close

Proceed To Checkout

6,800.00

6,800.00

Quote number

M-042319-1

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price | |
|---|-------------|----------------|------------|----------|------------|-----|
| 1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. | Robinson | EA | 6,800.00 | 1 EA | 6,800.00 | ... |

In the Non-Catalog Item window:

Edit the relevant fields on the line item that need to be corrected or completed.
Click **Save**.

Click Proceed to Checkout to continue to the draft requisition.

Simple Advanced

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

Cart NameCassidy Powerwashing

Description

Multi-Invoice/Payment☐

After-The-Fact Purchase☐

Waiver of Bid☐

1 Item

CASSIDY PAINTING • 1 Item • 178,500.00 USD

SUPPLIER DETAILS

MAIN : 102 CASSIDY DRIVE, NEWPORT, Delaware 198...

Contractno value

PO Number

To Be Assigned

Quote number

M-042319-1

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price | |
|---|-------------|----------------|------------|----------|------------|--|
| 1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. | Robinson | EA | 178,500.00 | 1 EA | 178,500.00 | |

Details

For Brandon Gabriel-Perez

Total (178,500.00 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 *178,500.00

Total *178,500.00



General

Cart Name

Cassidy Powerwashing

Description

no value

Priority

Normal

Prepared by

Brandon Gabriel-P

Prepared for

Brandon Gabriel-P

Department

PROCUREMENT S

Ad-Hoc Approver

Select

Shipping

Ship To

Billing

Bill To

Draft

Correct these issues.

You are unable to proceed until addressed.

In the **General** section of the draft requisition, most of the information will be pre-filled from the information you entered in your shopping cart.

- The **Multi-Invoice/Payment** field will have a **red X** by default, indicating that the order will be set up to accommodate supplier invoices that bill by the quantity of items. This is most common when purchasing goods. This field does not need to be selected if each line item is to be paid *in full* as it is invoiced.
- The **Multi Invoice/Payment** field should be edited to display a **green check mark** when the order needs to be set up to accommodate supplier invoices that are based on amount, paying the order in parts, and drawing down the dollar amount of the order to zero. For example, if UD is to pay the vendor 20% up front and then the remaining 80% upon completion of the work. This is most common when purchasing services. This is also known as a “blanket PO”.
- You should decide whether to select this option based on your review of the quote. A Procurement Services staff member will also review the Multi Invoice/Payment box for accuracy once the requisition reaches Procurement for approval.

Internal Fields

UD Internal Fields

eBuilder Process Instance

After-The-Fact Purchase

Technology Request #

Waiver of Bid

Buyer Information

Draft

Active

Brandon Gabriel-Perez

Requisition • 3753651

Summary PO Preview Comments Attachments History

General

Cart Name Cassidy Powerwashing
Description no value
Priority Normal
Prepared by
Prepared for
Department
Ad-Hoc Approver
Multi-Invoice/Payment



Shipping

Ship To
Shipping address code

Internal Fields

UD Internal Fields

eBuilder Process Instance no value
After-The-Fact Purchase X
Technology Request # no value
Waiver of Bid X

Buyer Information

Edit General

General

Cart Name * Cassidy Powerwashing
Description
Normal
Rachel Requester
Substitute, Sammy
Purchasing Business Unit UOD01
eBuilder Process Instance
Multi-Invoice/Payment



★ Required fields



Save

Close

To select the **Multi-Invoice/Payment** box:
Click the **Pencil** in the General section.
Check the **Multi-Invoice/Payment** box.
Click **Save**.

Draft

✖ **Correct these issues.**
You are unable to proceed until addressed.
[Required: Account Code \(Line 1\)](#)

⚠ **Be aware of these issues.**
You may review and proceed.
[Empty: Internal Note/Business Justification](#)

Total (178,500.00 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 178,500.00
178,500.00

What's next for my order?

Next Step COA Approver
Approver [Walueff, George](#)

Workflow


Show skipped steps

Draft
Active
[Brandon Gabriel-Perez](#)



Summary PO Preview Comments Attachments History


Buyer Information

 User does not have the necessary permissions

Accounting Codes

| Work Order Number | SpeedType | Purpose | Fund | Dept | Program | Source | Project ID | User Ref | Cost Share Project |
|-------------------|-----------|---------|------|------|---------|--------|------------|----------|--------------------|
|-------------------|-----------|---------|------|------|---------|--------|------------|----------|--------------------|


Draft

 **Correct these issues.**

You are unable to proceed until addressed.

Required: Shipping address



Required: SpeedType



If you are completing a requisition that was assigned to you by a Shopper, here is what you need to know about Prepared For/Prepared By Users:

- The **Prepared By** name will *always* be the Requester who clicks **Place Order** to submit the requisition for approval. This information is captured by the system and *cannot* be changed.
- By default, the **Prepared For** name is the Shopper who started the order. The Prepared For person becomes the **PO Owner**, and future visibility access to the PO is based on that person's HR department ID.
 - *However*, this name *can* be changed if needed! The PO Owner should be the person who can answer questions about the PO and who will be approving invoices for payment when required.

Approvers **There are no approvers**

Workflow  



UNIVERSITY OF DELAWARE
EXCHANGE
TEST SITE

Requisition • 3396507

Summary | PO Preview | Comments | Attachments | History

General

Cart Name
Cassidy Powerwashing

Description
no value

Priority
Normal

Prepared by
Rachel Requester

Prepared for
Sam Shopper

Purchasing Business Unit
UOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instance
no value

Multi-Invoice/Payment
✕

Shipping

Ship To
no address
Required

Delivery Options

Expedite

Ship Via

Requested Delivery D

Buyer Information

Edit General

General

Cart Name *
Cassidy Powerwashing

Description

Priority
Normal

Prepared by
Rachel Requester

Prepared for
Sam Shopper

Purchasing Business *
Unit
UOD01

eBuilder Process Instance

Multi-Invoice/Payment
☐

User Search

Last Name
substitute

First Name

User Name

Email

Department

Role

Results Per Page
10

Search

Close

To change the Prepared For (PO Owner) name:

Click on the **Pencil** in the General section.

Click on the **Magnifying Glass** in the **Prepared For** field of the Edit General pop-up.

Search for the user in any of the fields shown in the **User Search** pop-up.

Click **Search**.



User Search

New Search

| Name | ↑ | User Name | Email | Phone | Action |
|-------------------|---|-------------------|------------------|-------|--------------|
| Substitute, Sammy | | test2500requester | ud-mart@udel.edu | | <div>+</div> |

Close

Click the + symbol next to the correct name.

Prepared for

Sam Shopper

Expedite

Purchasing Business Unit

UOD01
UNIVERSITY OF DELAWARE

Ship Via

eBuilder Process Instance

no value

Requested Delivery D

Multi-Invoice/Payment

×

Prepared by

Rachael Requester

Purchasing Business Unit

★ UOD01

eBuilder Process Instance

Multi-Invoice/Payment

☐

★ Required fields

Save

Close

Required: Account Code (Line 2)

⌵

⚠ Be aware of these issues.

You may review and proceed.

Empty: Internal Note/Business Justification

Total (24,650.00 USD)

⌵

Subtotal

24,650.00

24,650.00

What's next for my order?

⌵

Next Step

Wait for Validation Response

Approvers

There are no approvers

Workflow

Buyer Information

ⓘ User does not have the necessary permissions to view the custom fields associated with

Accounting Codes

| Work Order Number | SpeedType | Purpose | Fund | Dept | Program | Source | Project ID | User Ref | Cost Share Project |
|-------------------|-----------|---------|------|------|---------|--------|------------|----------|--------------------|
| | | | | | | | | | |



UNIVERSITY OF DELAWARE

EXCHANGE

TEST SITE

All

Search (Alt+Q)

24,650.00 USD

23

11

Requisition • 3396507

Summary

PO Preview

Comments

Attachments

History

General

Cart NameCassidy Powerwashing

Descriptionno value

PriorityNormal

Prepared byRachel Requester

Prepared forSam Shopper

Purchasing Business UnitUOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instanceno value

Multi-Invoice/Payment✗

Shipping

Ship To

no address
Required

Delivery Options

Expedite

Ship Via

Requested Delivery D

Buyer Information

1 User does not have the necessary permissions to view the custom fields associated with

Accounting Codes

Work Order

Number

SpeedType

Purpose

Fund

Dept

Program

Source

Project ID

User Ref

Cost Share

Project

Edit General

General

Cart Name *Cassidy Powerwashing

Description

PriorityNormal

Prepared byRachel Requester

Prepared forSubstitute, Sammy

Purchasing Business Unit *UOD01

★ Required fields

Save

Close

Draft

✗ Correct these issues.
You are unable to proceed until addressed.
Required: Shipping address
Required: SpeedType
Required: Account Code (Line 1)
Required: Commodity Code (Line 2)
Required: Account Code (Line 2)

⚠ Be aware of these issues.
You may review and proceed.
Empty: Internal Note/Business Justification

Total (24,650.00 USD)

Subtotal24,650.00

24,650.00

What's next for my order?

Next StepWait for Validation Response

ApproversThere are no approvers

Workflow

The new Prepared For user (PO Owner) will be populated.
Click Save.



Requisition • 3753651

☰

👁

🖨




?

⋮


Assign Cart

Place Order

Summary PO Preview Comments Attachments History

| | | | | | |
|--|----------------------|---|------|--|--------------------------|
| General  ... | | Shipping  ... | | Billing  ... ▾ | |
| Cart Name | Cassidy Powerwashing | Ship To | | Bill To | |
| Description | no value | Shipping address code | NC01 | Accounts Payable | accountspayable@udel.edu |

Draft

 **Correct these issues.**

You are unable to proceed until addressed.

[Required: Account Code \(Line 1\)](#)

and charged by

each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal

178,500.00

178,500.00

What's next for my order? ▾



Next Step

COA Approver


Approver

[Valueff, George](#)

Workflow

☐ Show skipped steps


 **Draft**


Active

Brandon Gabriel-Perez



In the **Internal Fields** section:

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

Multi-Invoice/Payment 

Internal Fields  ... ▾

UD Internal Fields

| | |
|---------------------------|---|
| eBuilder Process Instance | no value |
| After-The-Fact Purchase |  |
| Technology Request # | no value |
| Waiver of Bid |  |

Buyer Information ... ▾

 You do not have the necessary permissions to view the custom fields associated with this requisition.



Summary PO Preview Comments Attachments History

General

Cart Name

Cassidy Powerwashing

Description

no value

Priority

Normal

Prepared by

Brandon Gabriel-Perez

Prepared for

Brandon Gabriel-Perez

Department

PROCUREMENT SERVICES (04750)

Ad-Hoc Approver

Select

Multi-Invoice/Payment

Shipping

Ship To

Shipping address

NC01

code

UNIVERSITY OF DELAWARE

Attn: Brandon Gabriel-Perez

Room: Basement

162 THE GREEN

HULLIHEN HALL

NEWARK, DE 19716

United States

Billing

Bill To

Accounts Payable

accountspayable@udel.edu

222 South Chapel Street

Newark, DE 19716

United States

Billing Options

Purchasing Business

UOD01

Unit

UNIVERSITY OF DELAWARE

Shipping section:

- Review the **Ship To 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 the **pencil icon** to **edit**, and an **Edit Shipping** window will pop-up.

Buyer Information

Draft

Correct these issues.

You are unable to proceed until addressed.

Required: Account Code (Line 1)

Be aware of these issues.

You may review and proceed.

Empty: Internal Note/Business Justification

Total (178,500.00 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

178,500.00

178,500.00

What's next for my order?

Next Step

COA Approver

Approver

Walueff, George

Workflow

Show skipped steps

Draft

Active

Brandon Gabriel-Perez

Powered by JAGGAER | Privacy Policy

UNIVERSITY OF DELAWARE

22

UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

Requisition • 3753651

Summary

PQ Preview

Comments

General

Cart Name

Cassidy Powerwashing

Description

no value

Priority

Normal

Prepared by

Brandon Gabriel-Perez

Prepared for

Brandon Gabriel-Perez

Department

PROCUREMENT SERVICES (

Ad-Hoc Approver

Select

Multi-Invoice/Payment

✕

Internal Fields

UD Internal Fields

eBuilder Process Instance

After-The-Fact Purchase

Technology Request #

Waiver of Bid

Buyer Information

Edit Shipping

Ship To ★

Shipping address code

NC01

CURRENT ADDRESS

Contact Line 1

UNIVERSITY OF DELAWARE

Attn: ★

Brandon Gabriel-Perez

Room: ★

Basement

Address Line 1

162 THE GREEN

Address Line 2

HULLIHEN HALL

City

NEWARK

State (Use two letter

DE

Zip Code

19716

Country

United States

NC01 - UNIVERSITY OF DELAWARE , Brandon Gabriel-Perez, Basement, 162 THE GREEN, HULLIHEN HALL, NEWARK, DE 19716, United States

★

Search additional

Q

Results Per Page

10

▼

★ Required fields

Save

Close

Edit Shipping:

Your default address will be shown under **Current Address**.

You can search for a different campus address in the **Search additional** field by the building name, building code, or partial street address.

Click the **Magnifying Glass** icon to search.

Please **DO NOT** use the **ZZ_*1-TIME** non-campus address option to enter a campus address.

next for my order?

COA Approver

Valueff, George

Show skipped steps

Draft

Active

Brandon Gabriel-Perez

Powered by JAGGAER | Privacy Policy



Requisition • 3753651

☰

👁

🖨

?

⋮

Assign Cart

Place Order

Summary PO Preview Comments Attachments History

General

Cart Name
Cassidy Powerwashing

Description
no value

Priority
Normal

Prepared by
Brandon Gabriel-Perez

Prepared for
Brandon Gabriel-Perez

Department
PROCUREMENT SERVICES (04750)

Ad-Hoc Approver

Multi-Invoice/Payment

Shipping

Ship To

Shipping address
code
NC01

UNIVERSITY OF DELAWARE
Attn: Brandon Gabriel-Perez
Room: Basement
162 THE GREEN
HULLIHEN HALL
NEWARK, DE 19716
United States

Billing

Bill To

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Billing Options

Purchasing Business
UOD01
UNIVERSITY OF DELAWARE

Billing section:
There is only one central billing address for UD. It will be pre-filled and cannot be edited.

Internal Fields

UD Internal Fields

eBuilder Process Instance
no value

After-The-Fact Purchase
✗

Technology Request #
no value

Waiver of Bid
✗

Buyer Information

Draft

✗ **Correct these issues.**
You are unable to proceed until addressed.
[Required: Account Code \(Line 1\)](#)

⚠ **Be aware of these issues.**
You may review and proceed.
[Empty: Internal Note/Business Justification](#)

Total (178,500.00 USD)

178,500.00

178,500.00

What's next for my order?

Next Step
COA Approver

Approver
[Valueff, George](#)

Workflow

Show skipped steps

Draft
Active
Brandon Gabriel-Perez



Requisition • 3753651

Summary PO Preview Comments Attachments History

Internal Fields

UD Internal Fields

| | |
|---------------------------|----------|
| eBuilder Process Instance | no value |
| After-The-Fact Purchase | ✗ |
| Technology Request # | no value |
| Waiver of Bid | ✗ |

Buyer Information

User does not have the necessary permissions to view the custom fields associated with this section.

Accounting Codes

Buyer Information section:
Only Buyers working in Procurement Services will see details of the requisition in this section.

Internal Notes and Attachments

| | |
|--------------------------------------|---------------------|
| Internal Note/Business Justification | no value ▲ Empty |
| Internal Attachments | Add |

External Notes and Attachments

| | |
|---------------------------------|----------------|
| Note to all Suppliers | no value |
| Attachments for all suppliers | Add |
| PO Clauses | 1 View details |
| Additional Notes to print on PO | no value |

Draft

✗ Correct these issues.

You are unable to proceed until addressed.

Required: Account Code (Line 1)

▲ Be aware of these issues.

You may review and proceed.

Empty: Internal Note/Business Justification

Total (178,500.00 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 178,500.00

178,500.00

Workflow

Show skipped steps

Draft

Active

Brandon Gabriel-Perez

Accounting Codes

| Work Order Number | SpeedType | Purpose | Fund | Dept | Program | Source | Project ID | User Ref | Cost Share Project |
|-------------------|--------------------------------|----------|----------|----------|----------|----------|------------|----------|--------------------|
| N/A | no value | no value | no value | no value | no value | no value | no value | no value | no value |
| N/A | <div><div></div>Required</div> | | | | | | | | |

Internal Notes and Attachments

| | |
|------------------------|----------|
| Internal Note/Business | no value |
| Justification | ▲ Empty |

External Notes and Attachments

| | |
|-------------------------------|---------------------|
| Note to all Suppliers | <i>no value</i> |
| Attachments for all suppliers | Add |

Draft

✖

Correct these issues.

▼

You are unable to proceed until addressed.

Required: SpeedType

Required: Account Code (Line 1)

Required: Commodity Code (Line 2)

Required: Account Code (Line 2)

⚠

Be aware of these issues.

▼

You may review and proceed.

Empty: Internal Note/Business Justification

| | |
|-----------|------------------------------|
| Next Step | Wait for Validation Response |
|-----------|------------------------------|

Approvers There are no approvers

Workflow

Dead

Powered by JAGGAER | [Privacy Policy](#)

Any **Accounting Codes (SpeedType/Purpose Code)** fields that must be completed will be marked as **required**.

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).*



Edit Accounting Codes

Accounting Codes

| Work Order Number | SpeedType * | Purpose | Fund | Dept | Program | Source | Project ID | User |
|-------------------|-------------|----------|----------|----------|----------|----------|------------|------|
| N/A | No Value | No Value | No Value | No Value | No Value | No Value | No Value | No |

Required

★ Required fields

Save

Close

Click the **Magnifying Glass** in the **SpeedType** field.

Facilities users may click on the arrow in the Work Order Number field to enter by Work Order instead.

Additional Notes to print on PO no value

2 Items

CASSIDY PAINTING - 2 Items - 24,650.00 USD

SUPPLIER DETAILS MAIN - 100 CASSIDY DRIVE, NEWPORT Delaware 198

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow

Draft Active



UNIVERSITY OF DELAWARE EXCHANGE

TEST SITE

24,650.00 USD

Search (Alt+Q)

24,650.00 USD

Accounting Codes

Work Order Number

SpeedType *

Purpose

N/A

No Value

No Value

Required

★ Required fields

Internal Notes and Attachments

Internal Note/Business Justification

no value

Internal Attachments

2 Items

CASSIDY PAINTING - 2 It

SUPPLIER DETAILS

Custom Field Search

Value

building

Filter

Clear All Filters

1-6 of 6 Results

20 Per Page

| Value | Description |
|------------|--------------------------------|
| FACL175162 | BUILDING PLAN SURVEY |
| HNSC175133 | CHS BUILDING FUND |
| RNOV853544 | SEAWATER LAB BUILDINGS |
| RSLF212134 | RL&H BUILDING PROGRAMS FY EAST |
| STGP913227 | BUILDING LEADERS |
| STGP913231 | CLUB BODYBUILDING |

Total (24,650.00 USD)

Subtotal

24,650.00

24,650.00

my order?

Wait for Validation Response

There are no approvers

Save

Close

A search box will appear.

Search for the SpeedType in the **Value** or **Description** field.

Click **Filter**.

To select your SpeedType from the available options, click “+” sign.

Powered by JAGGAER | Privacy Policy



Edit Accounting Codes

Accounting Codes

| Work Order Number | SpeedType * | Purpose | Fund | Dept | Program | Source | Project ID | User |
|-------------------|-------------|------------|-------|-------|---------|----------|------------|------|
| N/A | FACL175162 | FACL175162 | OPBAL | 05801 | OPMNT | No Value | No Value | No |

Search

★ Required fields



Save

Close

All chart field 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 the Controller's Office. Contact coa-finance@udel.edu for assistance.



Edit Accounting Codes

Accounting Codes

| nd | Dept | Program | Source | Project ID | User Ref | Cost Share Project | % of Price | |
|-------|-------|---------|----------|------------|----------|--------------------|------------------|-----------------|
| OPBAL | 05801 | OPMNT | No Value | No Value | No Value | No Value | 45 | (11,092.50 USD) |
| OPBAS | 05804 | OPMNT | No Value | No Value | No Value | No Value | 55 | (13,557.50 USD) |
| | | | | | | | Split Total 100% | (24,650.00 USD) |

When you split by percentage, the system will calculate and display dollar amounts for you, but Approvers will *not* see this. The best practice to inform others of these dollar amounts is to screenshot them and attach them to a comment on the requisition.

★ Required fields

Save Close

If you need to add a funding split, hover your cursor over the accounting codes window to make the '+' appear, and click '+'.

Funding splits in this header section can be made by **percentage of price or percentage of quantity**.

- These percentages will apply to every invoice payment unless you override this header accounting on a specific line item.
- Unlike this header accounting section, funding splits made on specific line items *can* be split by *amount* of price or quantity as well as by percentage (see slide 40 for details).

Click **Save**.



Accounting Codes

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

Internal Notes and Attachments

Internal Note/Business Justification

no value

Empty

Internal Attachments

Add

External Notes and Attachments

Note to all Suppliers

no value

Attachments for all suppliers

Add

PO Clauses

1 View details

Additional Notes to print on PO

no value

Draft

Correct these issues.

You are unable to proceed until addressed.

Required: Account Code (Line 1)

Be aware of these issues.

You may review and proceed.

Empty: Internal Note/Business Justification

Total (178,500.00 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

178,500.00

178,500.00

1 Item

CASSIDY PAIN

- SUPPLIER DETAIL
 - Contract
 - Quote number
 - Item
- 1 Robinson Hardware mildew not i
- ITEM DETAIL
 - Contract

Internal Notes and Attachments section:

- Internal Notes and Attachments are **only** visible to internal UD system users.
- Click the **Pencil Icon** to add your **Internal Note/Business Justification**.
 - A business justification is **required** for all UD purchases
 - Include the “who, what, when, where, and why” details of the purchase.
- Add your **Internal Attachments**, such as quotes and proposals, using the **Add** link.



Requisition • 3753651

Assign Cart Place Order

Summary PO Preview Comments Attachments History

Accounting Codes

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

Internal Notes and Attachments

| | | |
|--------------------------------------|---------------------------------|--------------------------------|
| Internal Note/Business Justification | Note to all Suppliers | no value |
| Internal Attachments | Attachments for all suppliers | Add |
| | PO Clauses | 1 View details |
| | Additional Notes to print on PO | no value |

Please be sure that any external attachments should truly be sent to the supplier.

Draft

Correct these issues.

You are unable to proceed until addressed.

[Required: Account Code \(Line 1\)](#)

Be aware of these issues.

You may review and proceed.

[Empty: Internal Note/Business Justification](#)

Total (178,500.00 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.

External Notes and Attachments section:

- External Notes and Attachments are visible to **both** internal UD system users *and* the supplier.
- There is no need to add a duplicate Internal attachment for your colleagues to see if the document is already in the External attachments section!
- Click the **Pencil Icon** to add a **Note to all Suppliers**– this should be any comment you would like the *supplier* to receive on the PO.
- Add any **Attachments for all Suppliers**, such as the supplier’s quote, using the **Add** link.

Requisition • 3753651

Summary

Internal Note/Business Justification

Internal Attachments

1 Item

CASSIDY PAINT

SUPPLIER DETAILS

MAIN : 102 CASSIDY DRIVE, NEWPORT, Delaware 198...

Contract no value PO Number To Be Assigned
Quote number M-042319-1

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|---|-------------|----------------|------------|----------|------------|
| 1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. | Robinson | EA | 178,500.00 | 1 EA | 178,500.00 |

ITEM DETAILS

Contract: no value Internal Note/Business Justification no value
Commodity Code 72000000 / Building, Facility Construction & Maintenance Services Internal Attachments Add
Account Code no value External Note no value
Required Attachments for supplier Add
PO Type Override X

Line-Item Internal and External Notes and Attachments:

Additional notes or attachments can be added to each line item, *if needed*. Each note/attachment should be added *only once* to the requisition.

Please do not add duplicate attachments to lines that are already attached in the Internal/External Notes sections.

Total (178,500.00 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 178,500.00
178,500.00

What's next for my order?

Next Step COA Approver
Approver Valueff, George

Workflow

Show skipped steps

Draft
Active
Brandon Gabriel-Perez



Summary PO Preview Comments Attachments History

| | | | |
|------------------------|-----------------|-----------------------|-----------------|
| Internal Note/Business | <i>no value</i> | Note to all Suppliers | <i>no value</i> |
|------------------------|-----------------|-----------------------|-----------------|

Click the **Pencil Icon** if you need to make a change to the **Supplier Information**, such as selecting a different fulfillment address or adding the quote number.

1 Item

CASSIDY PAINTING · 1 Item · 178,500.00 USD

^ **SUPPLIER DETAILS** MAIN : 102 CASSIDY DRIVE, NEWPORT, Delaware 198... ▼

| | | | |
|----------|-----------------|-----------|----------------|
| Contract | <i>no value</i> | PO Number | To Be Assigned |
|----------|-----------------|-----------|----------------|

Quote number M-042319-1

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price |
|--|-------------|----------------|------------|----------|------------|
| 1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows | Robinson | EA | 178,500.00 | 1 EA | 178,500.00 |

^ ITEM DETAILS

| | | | |
|-----------|-----------------|------------------------|-----------------|
| Contract: | <i>no value</i> | Internal Note/Business | <i>no value</i> |
|-----------|-----------------|------------------------|-----------------|

Commodity Code 72000000 / Building, Facility Construction & Maintenance Services Internal Attachments Add

| | | | |
|--------------|--|---------------|----------|
| Account Code | no value | External Note | no value |
| | Required | | |

Attachments for supplier [Add](#)

P0 Type Override ✖

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

Empty: Internal Note/Business Justification

Total (178,500.00 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 | 178,500.00 |
|----------|------------|

178,500.00

What's next for my order?

Next Step COA Approver

Approver [Walueff, George](#)

Workflow

☐ Show skipped steps

Draft
Active
Brandon Gabriel-Perez



| Summary | PO Preview | Comments | Attachments | History |
|--------------------------------------|---------------------|---------------------------------|----------------|---------|
| Internal Note/Business Justification | no value ▲ Empty | Note to all Suppliers | no value | |
| Internal Attachments | Add | Attachments for all suppliers | Add | |
| | | PO Clauses | 1 View details | |
| | | Additional Notes to print on PO | no value | |

Draft

✖

Correct these issues.

You are unable to proceed until addressed.

Required: Account Code (Line 1)

6-Digit UD Account Codes will be marked as **required**.

- If the commodity code of the item you are purchasing only has *one* account code associated with it, the account code will be pre-populated. If the commodity code has *multiple* account codes associated with it, you will need to select the correct account code.
- Selecting the correct account code is critical for approval routing, particularly for items that require collateral review. Incorrect selections will be returned to Requesters for correction.

To add a required **Account Code**:

- Click on the blue **Required: Account Code** link or the red **Required** link.

| | | | |
|--------------|----------------------|--------------------------|----------|
| Account Code | no value Required | External Note | no value |
| | | Attachments for supplier | Add |
| | | PO Type Override | × |

Workflow

Show skipped steps

Draft

Active

Brandon Gabriel-Perez



Edit Line 1: Item Details

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

Contract:

Commodity Code *

72000000

Building, Facility Construction & Maintenance Services

Account Code *

No Value

Required

Robinson EA

178,500.00

1 EA

178,500.00

Internal

Note: If you change the **commodity** code here, you will need to click save then re-open this window to refresh and see the account codes associated with your new commodity code.

1000 characters remaining

expand clear

PO Type Override

Save

Close

Quote number M-042319-1

To add an **Account Code**:

Click the **Magnifying Glass** in the Account Code field.

Quantity

Ext. Price

1 EA

178,500.00

budget checking, and workflow approvals.

Subtotal

178,500.00

178,500.00

What's next for my order?

Next Step

COA Approver

Approver

Walueff, George

Workflow

Show skipped steps

Draft
Active

Brandon Gabriel-Perez

Powered by JAGGAER | Privacy Policy

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

Contract:

Commodity Code *72000000

Account Code *No Value

Custom Field Search

Value

Description

Filter

Clear All Filters

< > Page 1 of 5 1-20 of 81 Results 20 Per Page

| Value ↑ | Description | |
|---------|---------------------------------|---|
| 141257 | MAINTENANCE SUPPLIES | + |
| 146004 | FACILITY CONSULTING AGREEMENT | + |
| 150300 | EQ & MACHINE MAINT/REPAIR | + |
| 151207 | BLDG & FACILITY CONSTRUCT MAINT | + |
| 151900 | MECHANICAL SYSTEMS REPAIR | + |
| 152200 | EQUIP (MAINT CONTRACTS) | + |

178,500.00

1 EA

178,500.00

Only account codes associated with your item's commodity code will be shown.

Search by **Value** or **Description** to refine your options.

Select **Filter** to begin search

Click on the “+” to select your code.



Edit Line 1: Item Details

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

Contract:

Commodity Code *
72000000
Building, Facility Construction & Maintenance Services

Account Code *

151207
Required

Robinson EA 178,500.00 1 EA 178,500.00

Internal Note/Business Justification

External Note

PO Type Override

1000 characters remaining expand clear

1000 characters remaining expand clear

☐

Save

Close

Once you have added your Account Code, click **Save**.

Quote number M-042319-1

Item

1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. Robinson EA 178,500.00 1 EA 178,500.00

ITEM DETAILS

Contract: no value

Commodity Code 72000000 / Building, Facility Construction & Maintenance Services

Account Code no value Required

Internal Note/Business Justification no value

Internal Attachments Add

External Note no value

Attachments for supplier Add

PO Type Override X

budget checking, and workflow approvals.

Subtotal 178,500.00 178,500.00

What's next for my order?

Next Step COA Approver

Approver Walueff, George

Workflow Show skipped steps

Draft Active Brandon Gabriel-Perez

If you need to edit one of your line items to contain different funding information than the rest of your requisition:

- Click the ellipsis to see the option for Accounting Codes.
- Select **Accounting Codes** to edit.
- Save** any changes.

| Item | Catalog No. | Size/Packaging | Unit Price | Quantity | Ext. Price | |
|---|-------------|----------------|------------|----------|------------|---|
| 1 Robinson Hall: Power wash all sides of the building to remove dirt and mildew not including roof top windows. | Robinson | EA | 6,800.00 | 1 EA | 6,800.00 | ⋮ |

ITEM DETAILS

| | | | |
|----------------|---|--------------------------------------|----------|
| Contract: | no value | Internal Note/Business Justification | no value |
| Commodity Code | 72000000 / Building, Facility Construction & Maintenance Services | Internal Attachments | Add |
| Account Code | no value Required | External Note | no value |
| | | Attachments for supplier | Add |
| | | PO Type Override | X |

Override

Supplier

Bill To

Accounting Codes

Remove

Add to Favorites

Move to Another Cart

Add to Draft Cart or Pending PR/PO

Note: When you edit accounting codes for specific line items, the accounting codes you entered in the accounting codes header section will appear the same; differences will only be visible at the line. The data on the line item is what will be reflected in PeopleSoft and UDataGlance.

UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Override Line 1: Accounting Codes

Allocation by percentage is recommended. If you choose to allocate a line by amount instead of percentage, please use the Internal Note field on the line to explain how you want the amounts applied. Accounts Payable may need to contact you with questions if an invoice does not voucher the line in full.

| Fund | Dept | Program | Def | Cost Share Project |
|-------|-------|---------|----------|--------------------|
| OPBAL | 05801 | OP | No Value | |
| OPBAS | 05804 | OP | No Value | No Value |

Line subtotal: 6,800.00 USD
Split Total 100.00 USD

★ Required fields

Save Close

In addition to allocating by percentage, you can select to allocate a line by amount of price or amount of quantity. Click **Save**.

Commodity Code 72000000 / Building, Facility Construction & Maintenance Services

Account Code no value

Internal Attachments Add

External Note no value

Attachments for supplier Add

Draft Active Sam Shopper

Powered by JAGGAER | Privacy Policy

Requisition • 3753651

Summary

General

Cart Name

Description

Priority

Prepared by

Prepared for

Department

Ad-Hoc Approver

Multi-Invoice/Payment

Internal Fields

UD Internal Fields

| | |
|---------------------------|----------|
| eBuilder Process Instance | no value |
| After-The-Fact Purchase | × |
| Technology Request # | no value |
| Waiver of Bid | × |

Buyer Information

User does not have the necessary permissions to view the custom fields associated with this requisition.

Prior to submitting the requisition, you can see all the **approval steps** that the requisition will go through.

- Some approval steps offer the option to see the name(s) of the specific Approver that the requisition will route to if you click on them.
- When you are ready, click the **Place Order** button.
- You will also have the option to Assign Cart if you want another Requester to review it. Remember – the Requester who clicks the Place Order button to submit the order for approval will be the Prepared By user.

Assign Cart

Place Order

178,500.00

What's next for my order?

Next Step

COA Approver

Approver

Valueff, George

Workflow

Show skipped steps

Draft

Active

Brandon Gabriel-Perez

PR Validation

Future

COA Approver

Future

Dept Purchasing Specialist

Future

Buyer Routing

Future

Procurement Approval

Future

Executive Approval 1

Future





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

✓ Requisition 3765483 Submitted

| Summary | | Options | |
|--------------------|----------------------|--|--|
| Requisition number | 3765483 | Print | |
| Requisition status | Pending | Recent orders | |
| Cart name | Cassidy Powerwashing | Return to your home page | |

You will receive confirmation that your requisition has been submitted.

| | |
|----------------------|---|
| Number of line items | 1 |
|----------------------|---|

Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Finding Suppliers and Supplier Information](#)
- [Commodity Code/Account Code Crosswalk](#)
- [Adding Financial Information to Requisitions](#)

