# **EIAWARE EXCHANGE**

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:

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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.

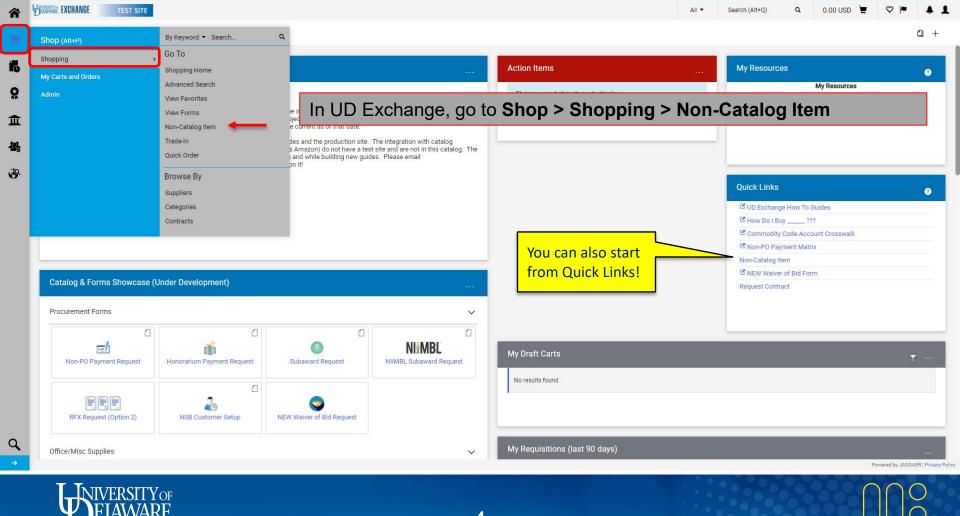
Not included: Wage rates, bond cost, floor coating or sealers, painting of exposed floor, staining of wood doors, p-lam finishes, caulking of cabinets and millwork, wall protection and accessories, wall coverings, nights or weekands.

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.



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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!







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Technology Request #

Waiver of Bid

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• 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.

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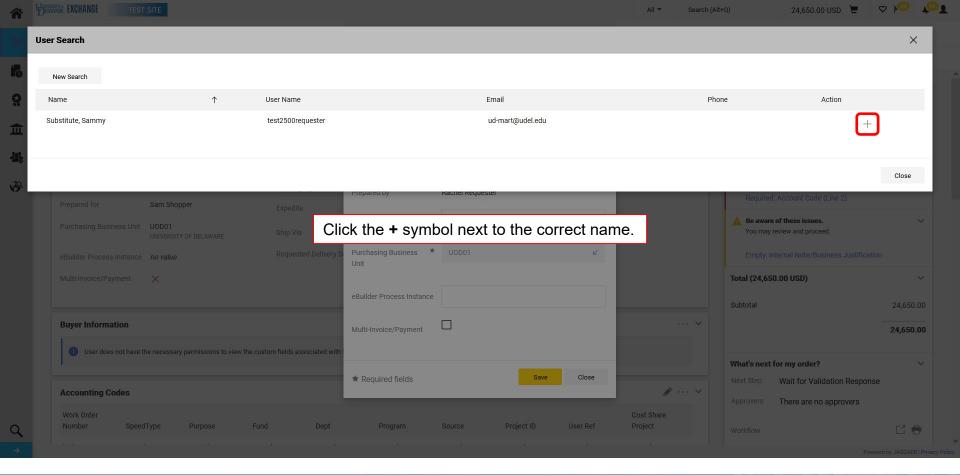
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Any **Accounting Codes** (SpeedType/Purpose Code) fields that must be completed will be marked as required. To edit the **Accounting Codes** section, click the **Pencil**.

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).

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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.

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ernal Note/Busin stification	0/100/100/0	<mark>ittachments</mark> ent to the su			Note to all Supp Attachments for	_	no value Add				Total (178,500.00 U		suncation	
		2011010651	Jobiler. –		Attachmento io	r un ouppriero	Add							
ternal Attachmen					PO Clauses		1 View details				Shipping, Handling, a	ind Tax charges ar	e calculated a	and charge
ternal Attachmen					PO Clauses Additional Note	s to print on PO	1 View details				Shipping, Handling, a each supplier. The va budget checking, and	lues shown here a	are for estima	
				ments	Additional Note:	s to print on PO					each supplier. The va	lues shown here a	are for estima	tion purpo
			l Attach	ments s	Additional Note:	s to print on PO					each supplier. The va	lues shown here a	are for estima	

• Add any **Attachments for all Suppliers**, such as the supplier's quote, using the **Add** link.

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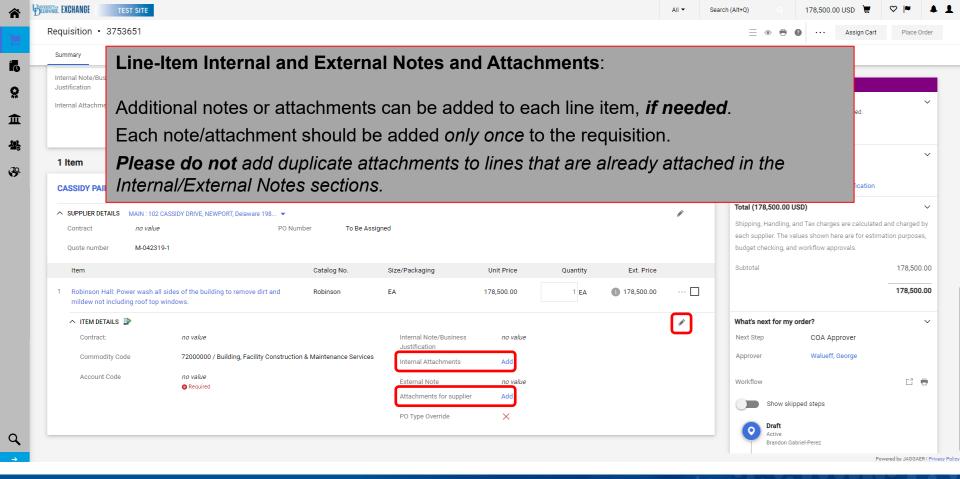


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Requisition • 3753651							📃 💿 🖶 👔 🚥 Assign Cart	Place Or
Summary PO Preview	Comments Attachments History							
Summary FOFFeview	Comments Attachments History							
Internal Note/Business	no value	Note to all Suppliers	no value					
Click the Penc	il Icon if you need to make	a change to	the Su	pplier I	nforma	tion, s	such as selecting a	
	nent address or adding the o	•		••		,	0	
	lent address of adding the t		51.					
1 Item						🔲 👻	A Be aware of these issues. You may review and proceed.	
						_		
CASSIDY PAINTING · 1 Item	· 178,500.00 USD						Empty: Internal Note/Business Justification	
SUPPLIER DETAILS MAIN : 102	2 CASSIDY DRIVE, NEWPORT, Delaware 198 💌				$\rightarrow$		Total (178,500.00 USD)	
Contract no valu	e PO Number To Be Assig	gned					Shipping, Handling, and Tax charges are calculated	· ·
Quote number M-0423	10.1						each supplier. The values shown here are for estim budget checking, and workflow approvals.	ation purpose
Quote number M-0423	13-1						budget checking, and worknow approvals.	
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		Subtotal	178,500
1 Robinson Hall: Power wash a mildew not including roof top	all sides of the building to remove dirt and Robinson	EA	178,500.00	1 EA	178,500.00	…		178,500
	i windows.							
∧ ITEM DETAILS							What's next for my order?	
Contract:	no value	Internal Note/Business Justification	no value				Next Step COA Approver	
Commodity Code	72000000 / Building, Facility Construction & Maintenance Services	Internal Attachments	Add				Approver Walueff, George	
Account Code	no value	External Note	no value				Workflow	Γĩ
Account oodc	S Required	Attachments for supplier	Add				WORNOW	
Account oode		. accommente for cappilor	1000				Show skipped steps	
Account code								
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	Requisition • 3753651					= •	Assign Cart	Place	Order
	Summary PO Preview	Comments Attachments History							
	Internal Note/Business Justification	no value	Note to all Suppliers	no value			Draft		
2		Empty	Attachments for all suppliers	Add		Correct these issu			~
•	Internal Attachments	bbA	PO Clauses	1 View details			proceed until addressed.		·
			Additional Notes to print on PO	no value		Required: Accou	nt Code (Line 1)		
						_			

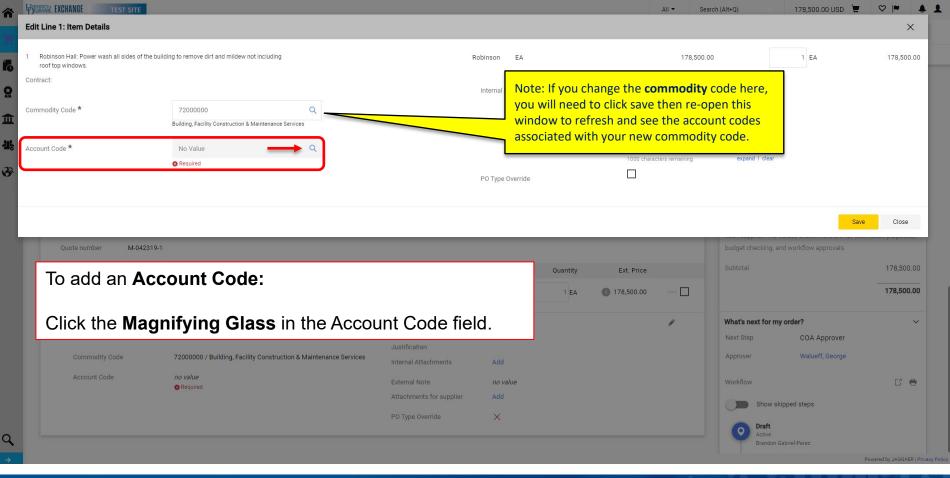
- 6-Digit UD Account Codes will be marked as **required**.
- If the commodity code of the item you are purchasing only has one account code associated with it, the
  account code will be pre-populated. If the commodity code has multiple account codes associated with it,
  you will need to select the 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**:

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

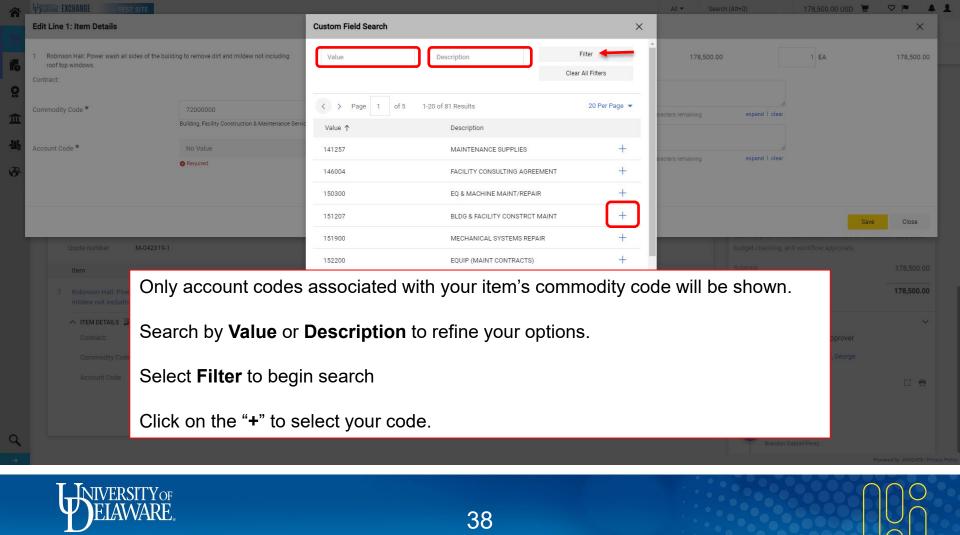
UNIVERSITY OF ELAWARE.	36		
		Brandon Gabriel-Perez Powered by JAGGAER	() Privacy Po
	PO Type Override	Oraft Active Brandon Gabriel-Perez	
Account Code	External Note no value Attachments for supplier Add	Workflow C <sup>2</sup>	3











TEST SITE				All 🔻	Search (Alt+Q)	178,500.00 USD 📜	♥  ♥ ♠
Edit Line 1: Item Details							×
<ol> <li>Robinson Hall: Power wash all sides of the buil roof top windows.</li> </ol>	Iding to remove dirt and mildew not including		Robinson EA		178,500.00	1 EA	178,500.00
Contract:			Internal Note/Business Justification			4	
Commodity Code *	72000000 Q Building, Facility Construction & Maintenance Services		External Note	1000 characters rem	aining expand I cle	ar	
Account Code *	151207 Q		External Note	1000 characters rem	aining expand I cle	li ar	
			PO Type Override				
						> Sav	e Close
Quote number M-042319-1					budget checkin	g, and workflow approvals.	
Item	Once you have	added your	Account Code,	click Sav	9. Subtotal		178,500.00
1 Robinson Hall: Power wash all sid mildew not including roof top win		EA	178,500.00 1 EA	178,500.00 ···			178,500.00
∧ ITEM DETAILS				ı	What's next for	r my order?	$\sim$
Contract:	no value	Internal Note/Business Justification	no value		Next Step	COA Approver	
Commodity Code	72000000 / Building, Facility Construction & Maintenance Services	Internal Attachments	Add		Approver	Walueff, George	
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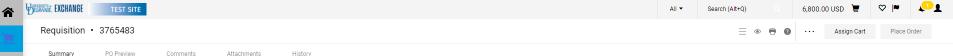
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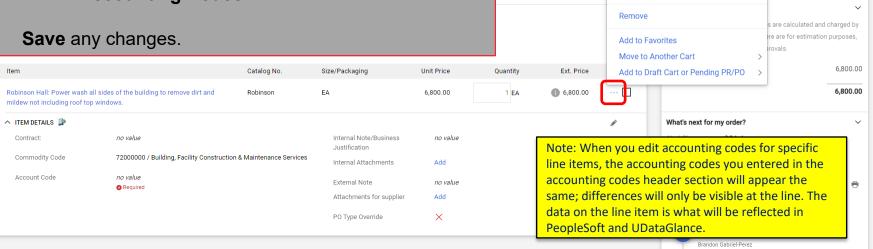
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- If you need to edit one of your line items to contain different funding information than the rest of your requisition:
- Click the ellipsis to see the option for Accounting Codes. .
- Select Accounting Codes to edit.



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Draft

Justification

You are unable to proceed until addressed

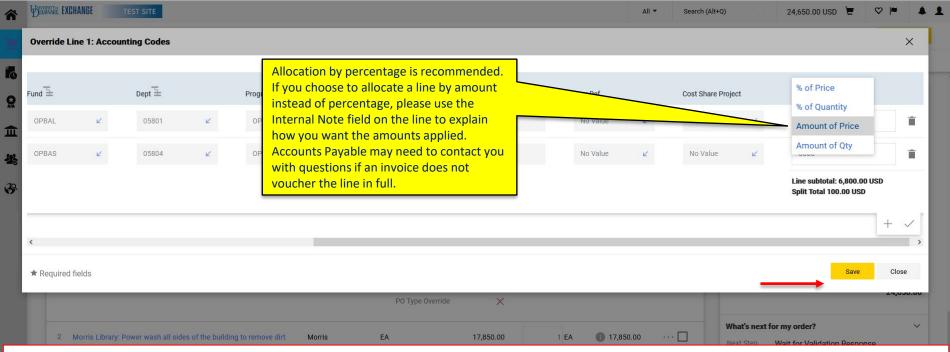
Correct these issues.

Override

Supplier

**Accounting Codes** 

Bill To



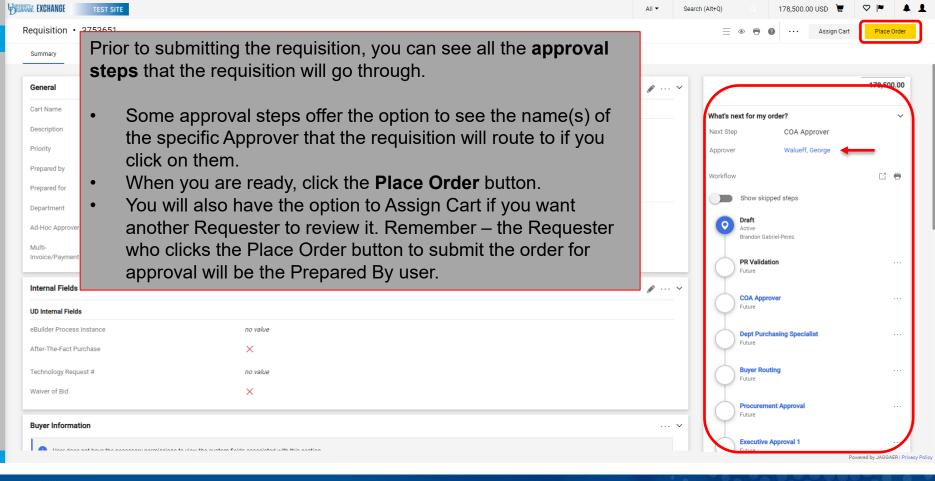
In addition to allocating by percentage, you can select to allocate a line by amount of price or amount of quantity. Click **Save**.

	Commodity Code	72000000 / Building, Facility Construction & Maintenance Services	Internal Attachments	Add		Draft	
a,	Account Code	no value	External Note	no value		Active Sam Shopper	
<b>→</b>		Descripted	Attachmante for cumilar	Add	· · · · ·		Powered by JAGGAER   Privacy Policy









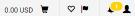


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Requisition	on 3765483 Submitted	
Summary		Options
Requisition number	3765483	Print
Requisition status	Pending	Recent orders
Cart name	Cassidy Powerwashing	Return to your home page

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Questions:

• procurement@udel.edu

**Resources:** 

- <u>Procurement Services Website</u>
- <u>Finding Suppliers and Supplier Information</u>
- <u>Commodity Code/Account Code Crosswalk</u>
- <u>Adding Financial Information to Requisitions</u>

