

Chartwells Catering Payment (Non-Catalog Item Add)

To process a Chartwells catering bill, use the Non-Catalog Item Add. If you have more than 5 catering events and know an approximate amount for the year or series of events, use the Standing Order Form.

- 1. From the Home Page, click on the **Shopping Cart** symbol on the left menu.
- 2. Under the Shopping menu, click Non-Catalog Item

*	Shop uw+			
1	Shop (Alt+P)	By Keyword 👻 Search Q		
-	Shopping	Go To	s Lab Supplies Legacy View Office Supplies Shopping Home	
-O	My Carts and Orders	Shopping Home		
0	Admin	Advanced Search		Office Supp
ATA .	Admin	View Favorites		
⋒	Shopping Settings	View Forms		
-		Non-Catalog Item	Visconsin	Office Suppli
-112		Quick Order	IBAY	
		Browse By		
39		Suppliers	INV institutions. To help you transition quickly, our learning and	
		Categories	I can access training on the ShopUW+ Essentials website, the	
հղ		Contracts		Procurement
		Chemicals	it the accessibility and usability of ShopUW+, go to ShopUW+ -	
85			It to report an accessibility barrier, or if you are having difficulty rs@uwsa.edu.	
ж				Requi

3. Enter Chartwells in the Enter Supplier field. Select Chartwells Dining Services.

Non-Catalog Item						?	x
Enter Supplier	or Supplier Search		-				
Description		Catalog No.	Quantity	Price	Packaging		
Test Item			1	500	LO - Lot		•
245 characters remainir	g expand clear						
Product Details							
		1	Save and Close	Save and Add	Another Close		

- 4. Description First 30 Characters will appear in WISER. Enter a clear description of the event. This will speed the payment process and help answer potential questions Accounts Payable may have.
- 5. Catalog No. Leave Blank
- 6. Quantity Enter 1.
- 7. Unit Price Enter the price of the invoice.
- 8. Packaging Select Lot.
- 9. Click on **Product Details**.
- 10. Add Internal Attachments Attach a PDF of the invoice. Click Next.



Non-Catalog Item					? X
Enter Supplier or Supplie	er Search]			
Description	Catalog No.	Quantity	Price	Packaging	
Test Item		1	500	LO - Lot	~
Commodity Code		2	▼	ontrolled substance ecycled azardous material adioactive ad Minor elect Agent	

- 11. Do not check any of the check boxes.
- 12. Enter **09** in the Commodity Code.
- 13. If you have additional invoices to add, click **Save and Add Another.** Repeat steps 4-12.
- 14. Once you have entered all the items, click Save and Close.
- 15. Click on the **Cart Icon** in the top right.

Shop uw+		All 👻	Search (Alt+Q)	q	500.00 USD 🖉	♡ ®	۵ı
Shop • Office Supplies						۵	+
AP Role Approver Dashboard Facility Supplies Help Dashboard IT Supplies Lab Supplies Legacy View Office Supplies Shopping Home					-		
Organization Message	Office Supplies Suppliers						
UNIVERSITY of WISCONSIN GREEN BAY	Office Suppliers						<u>~</u>
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16. Click View My Cart.

Shop uw+	All Search (Alt+Q)	Q 500.00 USD 🖉	⇒ 10 1
Shop • Office Supplies My Car	art (Fall 2021 Acceptance Brochures)	-	Q +
AP Role Approver Dashboard Facility Supplies Help Dashboard IT Supplies Lab Supplies Legacy View Office Supplies Shopping Home	Test Item Quantity: 1 Price: 500.00 USD	View My Cart Checkout	1
Organization Message Office Supplies Suppliers		500.00 USD	
Office Suppliers			~



Shopping Cart

17. Enter a short description in the **Name** section. Entering a name here will help you decipher between POs for the same vendor later and overall reduce searching time.

Shop uw+						All 👻	Search (Alt+Q) 0. 50.0	o usd 🗎	∽ ⊧•	6 1
Shopping Cart • 149653496 •							Assi	gn Cart	Proceed To Cheo	ckout
Simple Advanced Search for products, suppliers, forms, part number, etc.						 Q	Details For			~
500 Items KUEHN PRINTING LLC · 500 Items · 50.00 USD						•••	DOLLY M JACKSON Name 2021-10-07 00862941 01	←		
SUPPLIER DETAILS	Cotolog No	Size/Reskoning	Linit Price	Quantity	Ext Brigg		Estimate (50.00 USD)		50	~
1 Acceptance Brochures	Catalog NO.	EA	0.10	500 EA	50.00	… 🗆	10tal.			0.00
► ITEM DETAILS IP Commodity Code 19 Office Supplies, Related Item	Q a, and Services									
Capital Expense										

18. Click Proceed to Checkout.

Requisition

The Requisition page is where comments can be added to Purchasing, the business purpose and the funding string are entered and the final submission is done.

- 19. Click Comments tab
- 20. Click the **Plus Sign** to add a comment. Add any notes Purchasing might need. This is optional. If you have several invoices on the same requisition, add a comment stating how many invoices you are paying. Click **Checkmark** to complete the comment.

∕WW+						All 👻	Search (Alt+Q) 0.10 USD 👻 🤇	≫ •14 ↓ 2
equisition • 14918	9734 -						📃 💿 🖶 🚺 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History							
General	1	Purchasing Use Onl	y	ø	Shipping & Billing Information	ø v	Draft	
Cart Name	Fall 2021 Acceptance Brochures	Buyer ID	no value		Ship To		Shoppers may still assign cart to a Requester.	~
Description	no value	PO Clauses	View details		Attn: DOLLY M JACKSON Suite/Rm: CL730		Required: Business Purpose	
Prepared by	DOLLY M JACKSON	РО Туре	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING		Required: Account Required: Fund	
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States		Required: Department Required: Program	
Business Purpose	no value © Required	Bulletin Number	no value				Total (0.10 USD)	~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options		iona (or o oob)	
					Ship Via Best Carrier-Best Way		Subtotal	0.10

21. Click Required: Business Purpose



22. Select the appropriate category from the **Drop Down**



23. Click Save.

Click Here for Multiple Funding Code Instructions

Single funding code entry

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Requisition • 14885	4997 👻						😑 🐵 🖶 🚱 🛛 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History							
General	ø	Purchasing Use Only		1	Shipping & Billing Information	ø v	Draft	
Cart Name	Test for Training	Buyer ID	no value		Ship To		Shoppers may still assign cart to a Requester.	~
Description	no value	PO Clauses	View details		Attn: DOLLY M JACKSON		Required: Account	
Prepared by	DOLLY M JACKSON	PO Type	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING		Required: Fund Required: Department	
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States		Required: Program	
Business Purpose	Office Supplies (pens, copy paper, etc.) Office Supplies (pens, copy paper, etc.)	Bulletin Number	no value				Total (10.31 USD)	~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options		Subtotal	10.31
Business Unit	UW - Green Bay (UWGBY)	Offline Contract	no value		Ship Via Best Carrier-Best Way			10.31
Previous PO Number	no value	Procurement Authority	Chapter 16		Requested Delivery Date no value			

24. Click Required: Account.

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unding String									
3L Business Unit *	Speed Chart * 🗄	Account *	Fund * =	Department * 🗄	Program * =	PC Business Unit	Project 1	Class	
UWGBY 🖌	NONE_GBY	Search	Q Search	Q Search	Q v	No Value	Search	Q Search	۹
		Required	Required	Required	Required				
									•
								Stee	Close

25. GL Business Unit - Select UWGBY

26. Speed Chart – Leave as NONE_GBY. This auto fills when UWGBY is selected for the GL Unit.



- 27. Account Enter **3165.**
- 28. Fund 3-digit number from your funding string
- 29. Department 6-digit number. **All department numbers must be in format XXXXXX_GBY.** You must add the _GBY to the department number. Use the Magnifying Glass to select the department.
- 30. Program 1-digit number.
- 31. Project Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXX_GBY.** You must add the _GBY to the project number. Use the Magnifying Glass to select the project.
- 32. Class Only used by Athletics.
- 33. Click Save
- 34. Click Place Order
- 35. Email the invoice, List of Attendees, Agenda/Flyer, and signed Food Approval as a PDFs to <u>Accountspayable@uwgb.edu</u> and include the Requisition number or PO number. <u>Payments will not</u> <u>be processed if the invoice is not emailed to Accounts Payable.</u>



Multiple Funding Code Entry

∕W₩+						All 🔻	Search (Alt+Q) Q. 10.31 USD 👿	∞ 10 10
equisition • 14885	4997 -						📃 👁 🖶 🔕 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History							
General	ø	Purchasing Use Only		ø	Shipping & Billing Information	ø v	Draft	
Cart Name	Test for Training	Buyer ID	no value		Ship To		Correct these issues. Shoppers may still assign cart to a Requester.	Ý
Description	no value	PO Clauses	1 View details		Attn: DOLLY M JACKSON Suite/Rm: CL730		Required: Account	
Prepared by	DOLLY M JACKSON	РО Туре	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING		Required: Fund Required: Department	
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States		Required: Program	
Business Purpose	Office Supplies (pens, copy paper, etc.) Office Supplies (pens, copy paper, etc.)	Bulletin Number	no value				Total (10.31 USD)	~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options		Subtotal	10.31
Business Unit	UW - Green Bay (UWGBY)	Offline Contract	no value		Ship Via Best Carrier-Best Way			10.31
Previous PO Number	no value	Procurement Authority	Chapter 16		Requested Delivery Date no value			

24. Click Required: Account.

Edit Funding String									×
Funding String									
GL Business Unit *	Speed Chart * =	Account *	Fund * H	Department * 🗄	Program * 🗄	PC Business Unit	Project 🗄	Class	
UWGBY Ľ	NONE_GBY 🖌	Search Required	Q Search Required	Q Search Required	Q L L L L L L L L L L L L L L L L L L L	No Value	Search	Q Search	Q
★ Required fields								Save	Close

- 25. GL Business Unit UWGBY
- 26. Speed Chart Leave as NONE_GBY. This auto fills when UWGBY is selected for the GL Unit.
- 27. Account Enter **3165.**
- 28. Fund 3-digit number from your funding string
- 29. Department 6-digit number. **All department numbers must be in format XXXXXX_GBY.** You must add the _GBY to the department number. Use the Magnifying Glass to select the department.
- 30. Program 1-digit number.
- 31. Project Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXX_GBY.** You must add the _GBY to the project number. Use the Magnifying Glass to select the project.
- 32. Class Only used by Athletics.
- 33. Click Save
- 34. Scroll down to the item that has a different funding code from the one entered above.
- 35. Click on the Three Dots on the right of the price for that line

Shop	W+							All 🕶	Search (Alt+Q)		10.31 USD 🖉	⇔ ⊧ ⊙	™
Req	uisition • 148854997	•							\equiv	•	Assign Cart	Place Orde	er
Su	mmary PO Preview Com	ments Attachments History											
^	SUPPLIER DETAILS							/					
	Contract no	o value	PO Number To	Be Assigned							Draft		
									Total (10.31	USD)			~
	Quote number no	o value							Subtotal			10.3	31
	Item		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price						_
	C Requisition Wizard		-									10.0	
	Contract								What's next	for my orde	17		~
	Contract.	no valde							Next Step	Wait fo	r Validation Response		
1	Posters for Orientation			LO	0.01	1	0.01		Approvers	There a	are no approvers		
	∧ ITEM DETAILS							Override				E? @	4
	Asset ID	no value		Internal Note	no value			Suppli	er	Show ekinne	d etane		
	Capital Expense	×		Internal Attachments	Add			Ship T	0	onon anippa	o ampa		
	0	An (Decembric) Printing Production		External Note	no value			Deliver	ry Options	raft stive			
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	UNSPSC	no value						Fundir	a String	ar - Parallel St	eps		
2	Letterhead for Admissions			EA	1.06	5 EA	6 5.30			PR Valida	tion		



- 36. Click **Funding String** in the Override menu.
- 37. Click on the Account/Fund/Department/Program or Project to change
- 38. Change the funding to the new funding string.

Override Line 1: Funding String									
	.5			τ.	τ.	τ.	τ	τ.	
GL Business Unit *	Speed Chart * III	Account *	Fund * ±	Department * ==	Program * ±	PC Business Unit ==	Project =	Class III	
OMOBA 5	NONE_GBY	2620	Q 131	Q 400316_GBY	Q 1	No Value	Search	Q search	ų
								+	~ •
									· ·
* Required fields								Save	Close

- 39. Click Save.
- 40. Repeat for any additional item lines that need new funding entered.
- 41. Click Place Order
- 42. Email the invoice, List of Attendees, Agenda/Flyer, and signed Food Approval as a PDFs to <u>Accountspayable@uwgb.edu</u> and include the Requisition number or PO number. <u>Payments will not</u> <u>be processed if the invoice is not emailed to Accounts Payable.</u>