

# Non-Catalog Item Add (Purchase Orders)

The Non-Catalog Item Add is used for goods purchased totaling less than \$5,000, or goods purchased for state contract items. For goods purchases with a total of over \$5,000 that are not on state contract and all services, use the Requisition Wizard. If you are unsure which process to follow, use the requisition wizard. For multiple regular payments over a period of time, use the Standing Order Request.

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

<b>^</b>	Shop <b>uw+</b>			
7	Shop (Alt+P)	By Keyword 👻 Search Q		
-	Shopping	Go To	s Lab Supplies Legacy View Office Supplies Shopping Home	
l ()	My Carts and Orders	Shopping Home		_
<u>o</u>	Admin	Advanced Search View Favorites		Office Supp
<b>*</b>	Shopping Settings	View Forms		
		Non-Catalog Item	VISCONSIN	Office Suppli
<u>1</u>		Quick Order	BAY	
-		Browse By		
<b>\$</b>		Suppliers	UW institutions. To help you transition quickly, our learning and	
ы.		Categories	I can access training on the ShopUW+ Essentials website, the	
		Contracts		Procurement
<b>67</b> 2		Chemicals	It the accessibility and usability of ShopUW+, go to ShopUW+ - It to report an accessibility barrier, or if you are having difficulty rs@uwsa.edu.	
				Requi

- 3. Enter the Supplier's name. For individuals use the last name. Select the name from the drop-down list.
  - a. If the supplier does not appear, send a W9 via Liquidfiles
     (<u>https://liquidfiles.uwgb.edu/filedrop/alexandd@uwgb.edu</u>)) to Danielle Alexander or intercampus
     mail to Purchasing. Supplier set up takes up to a week. Do not email W9s or attach to
     ShopUW+.



- 4. Description First 30 Characters will appear in WISER. Enter a clear description that closely matches the quote/invoice. This will speed the payment process and help answer potential questions Accounts Payable may have.
- 5. Catalog No. Leave Blank
- 6. Quantity Enter the quantity of items purchased. If using lot unit of measure, enter 1.
- 7. Unit Price Enter the price of the item.
- 8. Packaging Select appropriate unit of measure. Most common: each for individual items, or lot for an order total.
- 9. Click on **Product Details**.



10. Add Internal Attachments – Attach PDFs of the backup for the Requisition/PO. Examples: quotes, service agreements, or invoices if available. **Do not attach a W9.** Click **Next.** 

Non-Catalog Item						? X
Enter Supplier	or Supplier Search		]			
Description		Catalog No.	Quantity	Price	Packaging	
Test Item			1	500	LO - Lot	~
Add Internal Attachm Commodity Code			<b>♦</b> م		Controlled substance tecycled 4azardous material addioactive add Minor Select Agent foxin	

- 11. Click the check box if the item falls under the list of categories on the right. Optional.
- 12. Click the Magnifying Glass next to Commodity Code.
- 13. Leave the boxes blank and Click Search

solutions.sciquest.com/apps/Router	CommodityCodeSearchPopup?Elen	mentId=NonCatItemCommoo	lity.
Commodity Code Search		2	Clo
Code starts with			
Description contains			

- 14. Click **Select** on the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.
- 15. If you have additional items to add, click **Save and Add Another.** Repeat steps 4-14.
- 16. Once you have entered all the items, click Save and Close.
- 17. Click on the **Cart Icon** in the top right.

Shop <b>um+</b>	All 👻	Search (Alt+Q)	٩	500.00 USD 🗎	∞ 🚾	<b>6</b> 1
Shop • Office Supplies				•	۵	+
AP Role Approver Dishboard Facility Supplies Help Dashboard IT Supplies Lab Supplies Legacy View Office Supplies Shopping Home				-		
Organization Message Office Suppliers						
UNIVERSITY of WISCONSIN Office Suppliers						~
GREEN BAY						
Welcome to ShopUWe We are very excited about this investment in you, your work and the work across all UW institutions. To help you transition quickly, our learning and development transition quickly, our learning and idenois based on your role. You can access training on the ShopUWe Exercise website, the						

18. Click Checkout.

Shop <b>uw+</b>	All 🕶	Search (Alt+Q)	٩	500.00 USD 📜	♥ №	۵ĩ
Shop • Office Supplies My Cart (	all 2021 Accept	ance Brochures)		4	<b>a</b>	+
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 U	SD T		View My Cart Checkout		
Organization Message Office Suppliers				500.00 U	SD	
Office Suppliers						~



## **Shopping Cart**

**19.** 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 <b>uw+</b>						All 👻	Search (Alt+Q)	50.00 USD	. ⇔ k <b>⊡</b> 🌾	2
Shopping Cart • 149653496 •							= +	Assign Cart	Proceed To Checkout	
Simple Advanced							Details		<b>1</b> .	
Search for products, suppliers, forms, part number, etc.							DOLLY M JACKSON			
KUEHN PRINTING LLC · 500 Items · 50.00 USD						🗆	2021-10-07 00862941 01	-	~	
Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		Total:		50.00	
Acceptance Brochures		EA	0.10	500 EA	50.00	🗌				
Commodity Code	Q									
Office Supplies, Rr	lated Items, and Services									

20. 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.

- 21. Click Comments tab
- **22.** Click the **Plus Sign** to add a comment. If the PO is to be sent via email, add the supplier email address of where to send the PO. Add any notes Purchasing might need. This is optional.

∕ <b>W</b> +						All 👻	Search (Alt+Q) 0.10 USD 👻 🛇	
equisition • 14918	9734 •						📃 💿 🖶 🚺 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History							
General	· ···	Purchasing Use Onl	y	<i>"</i>	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	PO Type	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	o Required	Bulletin Number	no value				Total (0.10 USD)	~
OTHER Business Purpose	no value	Waiver Number	no value		Delivery Options			
					Ship Via Best Carrier-Best Way		Subtotal	0.10

23. Click Required: Business Purpose



#### 24. Select the appropriate category from the **Drop Down**

Requisition • 149189734 •	Edit General	
Summary PD Preview Comments Attactments History	General	
Records found: 0	Cart Name *	Fall 2021 Acceptance Brochures
No comments have been added	Description	
	Prepared by	DOLLY M JACKSON
	Prepared for	DOLLY M JACKSON Q
	Business Purpose *	
		Academic / Student Services
	OTHER Business Purpose	Facility / Maintenance IT Purchase
	Business Unit	Laboratory / Classroom
	Previous PO Number	OTHER - please write in below Office Supplies (pens, copy paper, etc.)
	Receiving Required/Positive Approval?	
	New Fiscal Year	
		Com. City

25. Click Save.

### **Click Here for Multiple Funding Code Instructions**

### Single funding code entry

nop <b>UW+</b>							All 👻	Search (Alt+Q) 9. 10.31 USD 👻	© <b>10 1</b>
Requisition • 14885	4997 -							😑 🐵 🖶 🔕 🛛 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History								
General	ø	Purchasing Use Only		ø	Shipping & Billing Informati	ion	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.	~
Description	no value	PO Clauses	1 View details		Attn: DOLLY M JACKSON			Required: Account	
Prepared by	DOLLY M JACKSON	РО Туре	UNAS Lipassigned		2420 NICOLET DR EDUIPMENT SERVICE BUILDIN	a		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 Be	ist Carrier-Best Way			10.31
Previous PO Number	no value	Procurement Authority	Chapter 16		Requested Delivery Date no	value			

#### 26. Click Required: Account.

Edit Funding String									×
Funding String									
GL Business Unit *	Speed Chart * 🗄	Account *	Fund * =	Department * 🗄	Program * 🗄	PC Business Unit	Project +	Class	
UWGBY 🖌	NONE_GBY	Search	Q Search	Q Search	Q K	No Value	Search	Q Search	Q
		Required	Required	Required	Required				
4									•
* Required fields								Save	Close

- 27. GL Business Unit Select UWGBY
- 28. Speed Chart Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.
- 29. Account 4-digit account number. Go to <u>https://www.uwgb.edu/purchasing/shopuw/</u> and click on **Common Account Codes** for a list of common codes.



- 30. Fund 3-digit number from your funding string
- 31. 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.
- 32. Program 1-digit number.
- 33. 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.
- 34. Class Only used by Athletics.
- 35. Click Save
- 36. Click Place Order
- 37. When invoices are received, email the invoice and any backup 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) 0.10.31 USD	∞ №
equisition • 14885	4997 -							📃 👁 🖶 🚱 Assign Cart	Place Order
Summary PO Preview	Comments Attachments History								
General	ø	Purchasing Use Only		1	Shipping & Billing Infor	mation	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	View details		Attn: DOLLY M JACKSON Suite/Rm: CL730			Required: Account	
Prepared by	DOLLY M JACKSON	PO Type	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUI	DING		Required: Fund Required: Department	
Prepared for	DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-700 United States	3		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	Processored to the site	Chapter 16		Requested Delivery Date	no value			

### 26. Click Required: Account.

Edit Funding String									×
Funding String									
GL Business Unit *	Speed Chart * 🗄	Account *	Fund * =	Department * ±	Program * 🗄	PC Business Unit	Project	Class	
UWGBY Ľ	NONE_GBY 🖌	Search Required	Q Search © Required	Q Search Required	Q C C Required	No Value	Search	Q Search	۹
4									•
★ Required fields								Save	Close

- 27. GL Business Unit UWGBY
- 28. Speed Chart Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.
- 29. Account 4-digit account number. Go to <u>https://www.uwgb.edu/purchasing/shopuw/</u> and click on **Common Account Codes** for a list of common codes.
- 30. Fund 3-digit number from your funding string
- 31. 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.
- 32. Program 1-digit number.
- 33. 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.
- 34. Class Only used by Athletics.
- 35. Click Save
- 36. Scroll down to the item that has a different funding code from the one entered above.
- 37. Click on the Three Dots on the right of the price for that line

Shop <b>uw+</b>								All 👻	Search (Alt+Q)		10.31 USD 👻	⇔ h <b>o</b>	<b>1</b>
Requisition • 148854997 -								$\equiv$	• • 0	Assign Cart	Place Orde	er	
	Summary PO Preview Comment	ts Attachments History											
	Contract no valu	ue	PO Number To	Be Assigned					Draft				
	Quote number no valo	ue							Subtotal				31
	item		Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price				10.3	31	
	Contract no value								What's next for my order? Next Step Wait for Validation Response			~	
	1 Posters for Orientation			LO	0.01	1	0.01	-	Approvers	There are r	io approvers		
	A ITEM DETAILS	no value		Internal Note	no value			Override Supplie	r	Show skipped steps		Ľ 🖶	2
	Capital Expense	×		Internal Attachments	Add			Ship To Delivery Options		raft			
	Commodity Code	20 / Paper, Printing Equipment,	and Related Products and Service	External Note Attachments for supplier	Add			Bill To	ard Info	DLLY M JACKSON			
	UNSPSC	no value						Funding	ing String				
	2 Letterhead for Admissions			EA	1.06	5 EA	5.30			PR Validation			a



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

Override Line 1: Funding	Verride Line 1: Funding String										
								-			
GL Business Unit *	Speed Chart * ≟	Account *	Fund * 🗄	Department * 🗄	Program * 🗄	PC Business Unit ≟	Project 🗄	Class 🗄			
UWGBY 🖌	NONE_GBY 🖌	2620	Q 131	Q 400316_GBY	Q 1 2	No Value	Search	Q Search	۹		
								+ 、	/ •		
4									÷		
* Required fields								Save	Close		

- 41. Click Save.
- 42. Repeat for any additional item lines that need new funding entered.
- 43. Click Place Order
- 44. When invoices are received, email the invoice and any backup 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>