

# Standing Order Request (Previously Blanket POs)

The Standing Order Request is used for goods or services with over 5 payments or deliveries over a period of 2 months or more. Examples include: Utility bills, Catering for Summer Camps, Busing, ect.

- 1. From the Home Page, click on the **Shopping Cart** symbol on the left menu.
- 2. Under the **Shopping** menu, click **View Forms**

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1	Shop (Alt+P)	By Keyword - Search Q	
í.	Shopping  My Carts and Orders	Go To Shopping Home Advanced Search	I Facility Supplies Help Dashboard IT Supplies La
õ.	Admin Shopping Settings	View Favorites View Forms	
<b>7</b> 8		Non-Catalog Item Quick Order	VISCONSIN
<b>3</b> 9		Browse By Suppliers	(10/21) and Invoice workflow will pause at any SFS integrations. Ne
հր		Categories Contracts	ed and/or sent to the supplier. UW institutions. To help you transition quickly, our learning :
<b>Å</b>		Chemicals	i can access training on the shopow+Essentials website, th

- 3. Click on **Procurement Forms** on the right.
- 4. Click Standing Order Request.

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<u> </u>	Shop      Shopping      View Forms		
-	Build a New Form Non-Catalog Item	Procurement Forms	Folder Actions 👻 💡
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血	AP Forms		EA View Form Copy
<b>1</b> 22	Procurement Forms	Requisition Wizard	0.00 USD
<b>%</b>		Template Title: Requisition Wizard Purpose: Procurement Request	Submit Request Copy
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		Standing Order Request	0.00 USD
<b>8</b> 2			View Form Copy
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- 5. 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+.**



J Standing Order Request - Google Chrome			p States	With the second second	- 6 X
Solutions.sciquest.com/apps/Router/FavoritesF	ormEdit?&FavoriteProductId=5201631&wantRelo	adOnClose=true&FavPageContext=2&tmstmp=16353629312774	31		
Standing Order Request				Available Actions: Add and go	to Cart 🗸 Go Close 🚔
Shop <b>UW+</b>	Standing Order Request Required fields below are in bold. A standing order for expendable goods. Standing orders usually all The University will not issue Standing Orders for p Note: standing orders will encumber the entire am / positive approval checkbox (found on the PR dow	r is a purchase order with a single supplier which contains multiple del gn to fiscal year timelines unless specifically indicated by contract and unch-out / catalog vendors (i.e. Staples, Fisher, Grainger). count requested Releases will be handle offline with the supplier. Stan umen). When receiving is turned on, receipts will be created by cost n	very dates scheduled over a period of time. It is normally business need. ding orders will not require receiving, but receiving can b ceived, not quantify.	r used when there is a recurring need	t
		Supplier Information		?	
Enter Supplier		or Supplier Search			
		General Information		?	
Start Date		mm/dd/www			
End Date					
Product Description / Service Requested		254 characters remaining expand   clear			
Note: The Total Dollar Amount should be the full amo amount you estimate during the period of the standin Total Dollar Amount	unt you are encumbering with this PO. You will need t g order.	to estimate the amount for the entire period of the Standing Order. You	will need to request a change order (that will go through	approvals) if you will use more than the	
Extended Description / Justification for Standing Orde	q				
		1500 characters remaining	expand   clear		
Please provide contract number (if relevant):					
		ATTACHMENT AREA SECTION		?	
Attach competitive quotes, relevant contract, and / or Internal Attachments	other supporting documents				
Add Attachments				Size Date	
					Total 0.00 See configuration for this form

- 6. Start Date: This is the first day the product was ordered. For POs for the entire year, enter July 1<sup>st</sup>.
- 7. End Date: This is the last day the product will be delivered. For POs for the entire year, enter June 30<sup>th</sup>.
- 8. Product Description/Service Requested: 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.
- 9. Total Dollar Amount: Total or estimate of all the purchases for the year or time period.
- 10. Extended Description/Justification for Standing Order: Enter the full description along with any notes to Purchasing.
- 11. Please provide contract number: If you have the contract number, enter here. If not, leave blank.
- 12. Internal Attachments Attach PDFs of the backup for the Requisition/PO. Examples: quotes, service agreements, or invoices if available. **Do not attach a W9.**
- 13. Click Go next to Add and go to Cart.



# **Shopping Cart**

**14.** 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.

â	Shop <b>uw+</b>						All 🝷	Search (Alt+Q) 🕓 500.00 USD 📜 🗢 🏴 🛓
	Shopping Cart • 150471740 ▼							Assign Cart Proceed To Checkout
16 0	Simple Advanced Search for products, suppliers, forms, part number, etc.						۹.	Correct these issues. Shoppers may still assign cart to a Requester. The form Test' is incomplete or has errors. Open the form and correct the errors.
血器	KUEHN PRINTING LLC · 1 Item · 500.00 USD							Required: Commodity Code (Line 1) Details
<b>3</b> 9	SUPPLIER DETAILS Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price		For DOLLY M JACKSON
ங்	The form is incomplete or has errors. Open the form and correct the errors. T Test			500.00	Qty: 1	500.00	🗆	Name 2021-10-27 00862941 01
р. С	8							Estimate (500.00 USD) ~ Total: 500.00
	ITEM DE JAILS     Commodity Code     Grequired	۹ 🔶	I					
	Capital Expense							

- 15. Enter the Commodity Code. Click **Magnifying Glass**. Select the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.
- 16. 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.

- 17. Click Comments tab
- 18. 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.

					All 👻	Search (Alt+Q)	0.10 USD 🗎	♡  •13	<b>1</b>
734 🗸						∃ ● 🖶 Ø	Assign Cart	Place Orde	ler
Comments Attachments History									
1	Purchasing Use Only		ø	Shipping & Billing Information	ø v		Draft		
Fall 2021 Acceptance Brochures	Buyer ID	no value		Ship To		Correct these issues. Shoppers may still assign ca	art to a Requester.		~
no value	PO Clauses	View details		Attn: DOLLY M JACKSON Suite/Rm: CL730		Required: Business Purpo	se 🗲		
DOLLY M JACKSON	PO Type	UNAS Unassigned		2420 NICOLET DR EQUIPMENT SERVICE BUILDING		Required: Account Required: Fund			
DOLLY M JACKSON	Bid Number	no value		GREEN BAY, WI 54311-7003 United States		Required: Department Required: Program			
Required	Bulletin Number	no value				Total (0.10 USD)			~
no value	Waiver Number	no value		Delivery Options		Subtotal		0.	10
	734 - Comments Attachments History Fall 2021 Acceptance Brochures no value DOLLY M JACKSON DOLLY M JACKSON no value no value no value no value no value	734 - Comments Attachments History Purchasing Use Only Fall 2021 Acceptance Brochures Buyer ID no value PO Clauses DoLLY M JACKSON PO Type DoLLY M JACKSON Bid Number no value Waiver Number no value Waiver Number	734 ▼       Comments Attachments History       Image: Comments A	734 -       Comments Attachments History       Image: Comments Attachments History       Image: Comments Attachments Biology ID       Image: Comments Attachments ID	Part →     Purchasing Use Only     Purchasing Use Only	All       734 ~       Comments     Attachments       Attachments     History       Image: Comments     History       Image: Comments	Ait     Search (Att-c)     Search (Att-c)       734 ~     Comments     History       Comments     History       Purchasing Use Only     Image: Comments       State Only     Unassigned       Doculty M JACKSON     Bid Number     Image: Comments       Dial Comments     Bid Number     Image: Comments       Image: Comments     Comments     Comments <t< td=""><td>Ale     Search (AH-Q)     0.10 USD       734 ~     Image: Comments of Matchments (Matchments (Ma</td><td>AI     Search (AIt-c)     O     0.10 USD     ▼     P       734 ~     T</td></t<>	Ale     Search (AH-Q)     0.10 USD       734 ~     Image: Comments of Matchments (Matchments (Ma	AI     Search (AIt-c)     O     0.10 USD     ▼     P       734 ~     T

19. Click Required: Business Purpose



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



21. Click Save.

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

## Single funding code entry

vUW+						All 👻	Search (Alt+Q) 0 10.31 USD	♥ I <b>O</b> I
equisition • 148854	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		Shoppers may still assign cart to a Requester.	Ý
Description	no value	PO Clauses	View details		Attn: DOLLY M JACKSON Suite/Rm: CI 730		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			

## 22. Click Required: Account.

Edit Funding String									×
Funding String									
GL Business Unit *	Speed Chart * 🗄	Account *	Fund * 王	Department * 또	Program * 높	PC Business Unit 🗄	Project	Class	
UWGBY 🖌	NONE_GBY	Search	Q Search	Q Search	٩	No Value	Search	Q Search	۹
		Required	Required	Required	Required				
4									•
★ Required fields								Save	Close

### 23. GL Business Unit - Select UWGBY



- 24. Speed Chart Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.
- 25. 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.
- 26. Fund 3-digit number from your funding string
- 27. 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.
- 28. Program 1-digit number.
- 29. 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.
- 30. Class Only used by Athletics.
- 31. Click Save
- 32. Click Place Order
- 33. 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**

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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.	~
Description	no value	PO Clauses	1 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 BUILDING			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
		Berner and Andrews			Requested Delivery Date	no value			

### 22. Click Required: Account.

Edit Funding Stri	ing										×
Funding String											
GL Business Unit *		Speed Chart * 🗄		Account *	Fund * ±	Department * 🗄	Program * 🗄	PC Business Unit	Project	Class	
UWGBY	لا	NONE_GBY	¥.	Search Required	Q Search Required	Q Search © Required	Q C Required	No Value	Search	Q Search	۹
★ Required fields										Save	Close

- 23. GL Business Unit UWGBY
- 24. Speed Chart Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.
- 25. 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.
- 26. Fund 3-digit number from your funding string
- 27. 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.
- 28. Program 1-digit number.
- 29. 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.
- 30. Class Only used by Athletics.
- 31. Click Save
- 32. Scroll down to the item.
- 33. Click on the Three Dots on the right of the price for the line

Shop <b>uw+</b>						All 🕶	Search (Alt+Q)	0. 10.31 USD 🗑	⇔ ⊧ <b>0 t</b> 01
Requisition • 148854997 •							$\equiv$	🗈 🖶 🔕 Assign Cart	Place Order
Summary PO Preview Comments At	achments History								
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Contract no value	PO Number To B	le Assigned					-	Draft	
							Total (10.31	USD)	~
Quote number no value							Subtotal		10.31
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- 34. Click Funding String in the Override menu.
- 35. Click on the **Plus Sign (+)** to add a new funding string line.
- 36. Repeat steps 23 through 31 to enter the additional funding string.

Override Line 1: Funding	String								
GL Business Unit *	Speed Chart * =	Account *	Fund * H	Department * 🗄	Program * 🗄	PC Business Unit	Project	Class 5	
UWGBY 🖌	NONE_GBY	2620	<b>Q</b> 131	Q 400316_GBY	Q 1	✓ No Value	Search	Q Search	۹
								+	~ •
★ Required fields								Save	Close

- 37. Repeat for any additional funding lines that need to be entered.
- 38. Click Save.
- 39. Click Place Order.
- 40. 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>