ShopUW+ Helpful Hints and Tips

Add AP Form to Favorites *(Requester)*

Save PIR and DP forms as a template by adding to your favorites

Instructions on page 3-5

Receiving Required *(Shopper/Requester)*

Receiving required needs to be checked on a requisition for a **service** and for **food catering**

Instructions on page 6-7

The PO line item can be received when the service is completed and the amount is confirmed, you do not have to necessarily wait until an invoice is received

Requisition Line Description *(Shopper/Requester)*

Make sure to include a detailed Product Description / Scope and Date of Services on all requisitions entered that clearly explains the product/service

Instructions on page 8

Add a Recipient to a Comment added on a PO

Select a recipient to receive an email notification for the comment that is being added

Instructions on page 9-11

Requisition Wizard *(Shopper/Requester)*

Enter a requisition when an order is submitted for goods or when service is known – easier to process invoice when PO is already created and approved

If amount is not known – enter an estimated amount and check require receiving

Email Invoice Received for a PO to Accounts Payable *(Requester)*

Accounts Payable email: accountspayable@uwgb.edu

Please include the requisition number or PO number for reference

Account Number Required for Funding String *(Requester)*

The account number is required to be entered with the funding string. Please reference the common account codes document or use WISER to review past invoices to find the appropriate account number to be used.

Department Number Change in Funding String *(Shopper/Requester)*

All department numbers included in the funding string will end in **_GBY**

PO Line Item – 0 quantity *(Requester)*

A PO line item can **NOT** have a quantity of 0.

If a catalog item is mistakenly added from the punch out process, the line item needs to be deleted - DO NOT just change the quantity to 0.

Freight

Freight less than $100 – entered as a separate charge when invoicing by Accounts Payable

Freight greater than $100 – separate line needed on PO for freight amount

PIR Invoice Number *(Requester)*

PIR Invoice Number (If no invoice number provided, use the following format for invoice number: "PIR+MMDDYYYY+Lastname"- EX: DP02232021COX) ✱ ⓘ

If no invoice number provided, please use the date of service when following the format listed for an invoice number to use

PIR Form Description for Payment *(Requester)*

The Description for Payment field on the PIR form is the line description field in WISER

Invoice and PIR Due Dates *(Requester/Approvers)*

Invoices, PIRs and DPs will continue to be paid on the next pay cycle after it has been entered and approved

All suppliers now have terms which drives the voucher due date, but we will override the terms and pay immediately

Add AP Form to Favorites *(Requester)*

Save PIR and DP forms as a template by adding to your favorites

OR

Nickname: name for form/template

Description: description of form if desired

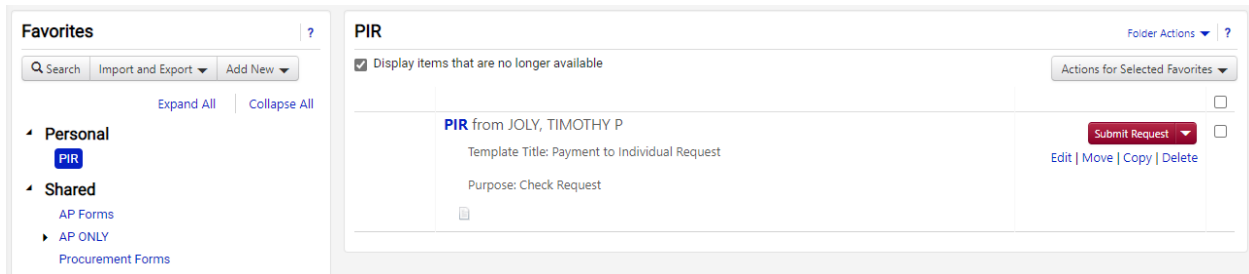Select the folder to add the form to under Personal

To add a new folder under Personal:

Select "Add New" and choose the location to add a new folder under

Access your previously saved Favorites by searching on the Shop tab, then Shopping, then View Favorites
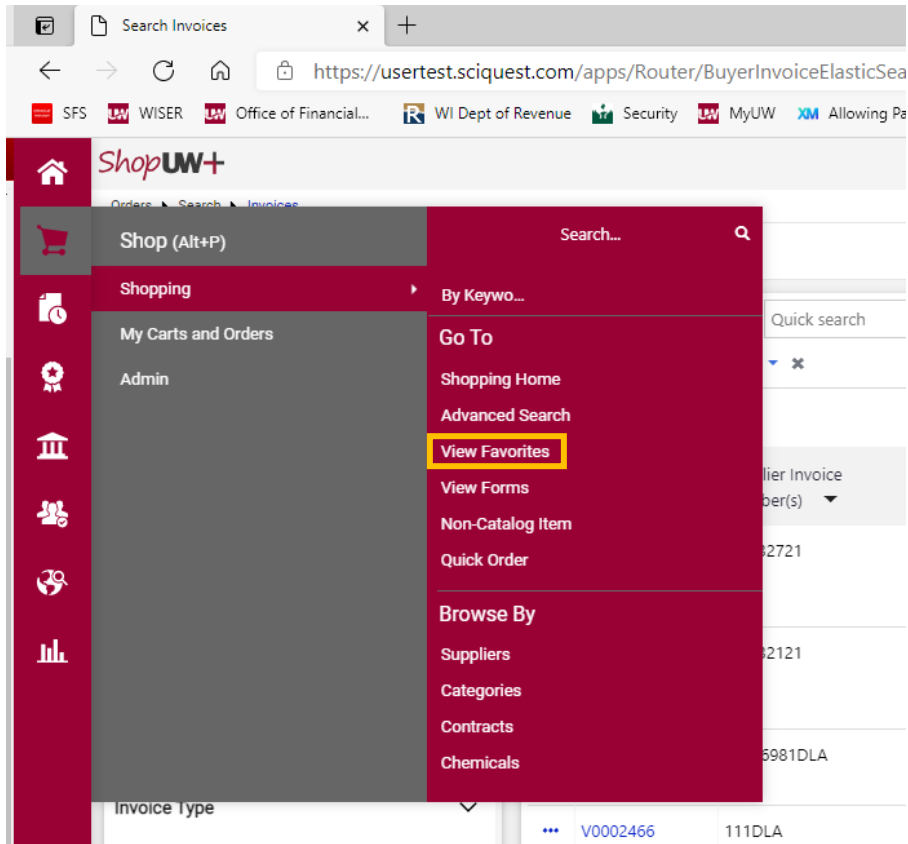
Your forms added as a Favorite will be displayed in the applicable folder under your Personal folder

Receiving Required *(Shopper/Requester)*

Receiving required needs to be checked on a requisition for a **service** and for **food catering**

- This will serve as our approval by the requester to confirm the invoice can be paid

General			
Cart Name	2021-04-09 00983707 01		
Description	*no value*		
Prepared by	Danielle Alexander		
Business Purpose	OTHER - please write in below Other		
OTHER Business Purpose	MAINTENANCE CHECK		
Business Unit	UW - Green Bay (UWGBY)		
Previous PO Number	*no value*		
Receiving Required/Positive Approval?	✕		
New Fiscal Year	✕		

Select the pencil in the General section to update the receiving required checkbox

Edit General ✕

General

Cart Name ★ | 2021-04-09 0098370⁷

Description | [ ]

Prepared by | Danielle Alexander

Business Purpose ★ | OTHER - please wri... ▼

OTHER Business Purpose | MAINTENANCE...

Business Unit | UW - Green Bay (UWGBY)

Previous PO Number | [ ]

Receiving Required/Positive Approval? | ☐ ⟵

Select the checkbox next to Receiving Required

New Fiscal Year | ☐

★ Required fields | **Save Changes** | Close

Receiving Required/Positive Approval? | ✓

New Fiscal Year | ☐

★ Required fields | **Save Changes** | Close

Once you see the green check mark, select "Save Changes"

Requisition Line Description *(Shopper/Requester)*

Make sure to include a detailed line description on all requisitions entered that clearly explains the product/service

- The line item description is located under the Item Information page of the Requisition Wizard

Add a Recipient to a Comment added on a PO

Select a recipient to receive an email notification for the comment that is being added

Locate the PO and navigate to the Comments tab

Purchase Order ▾ : GBY0000001 Revision 0

| Status | Summary | Revisions ❶ | Confirmations | Shipments | Change Requests | Receipts | Invoices ❶ | Comments | Attachments | History |
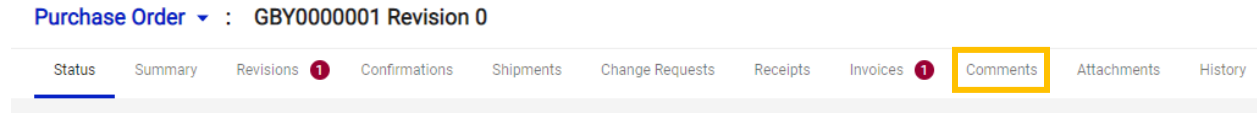
Select the **+** to add a comment
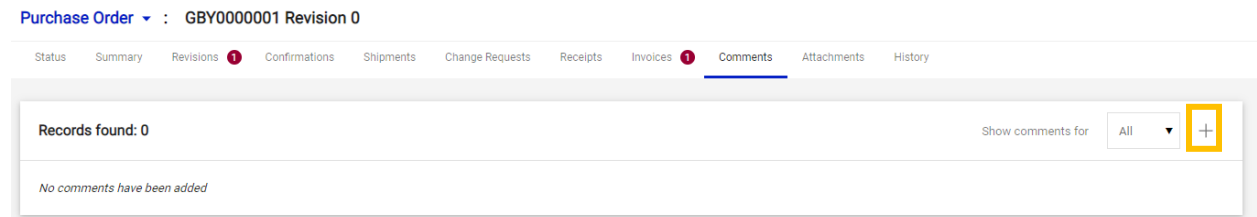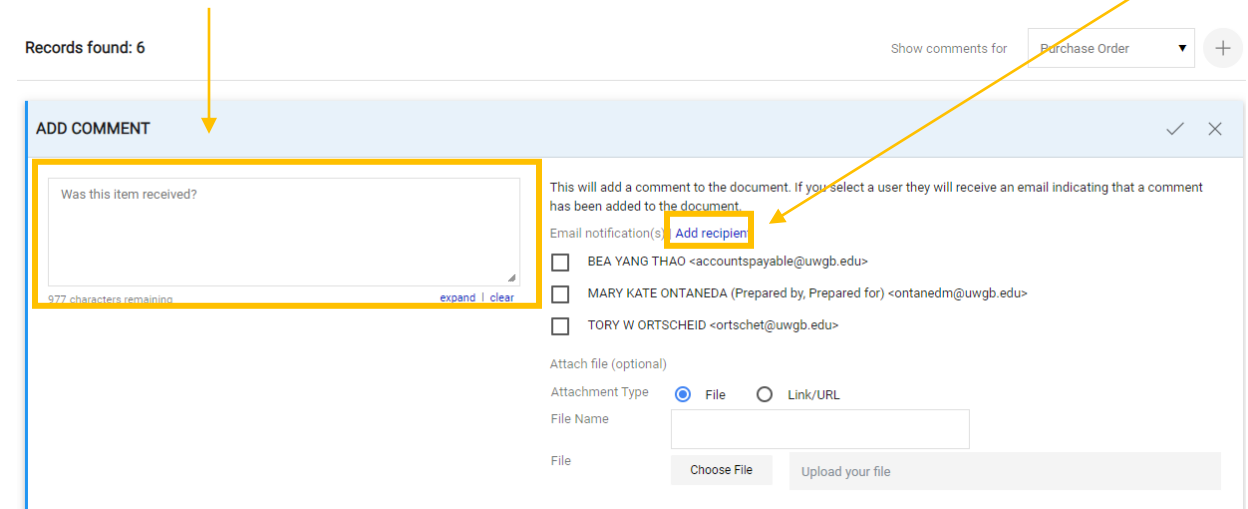
Purchase Order ▾ : GBY0000001 Revision 0

| Status | Summary | Revisions ❶ | Confirmations | Shipments | Change Requests | Receipts | Invoices ❶ | Comments | Attachments | History |

Records found: 0   Show comments for   All ▾   +

No comments have been added

Add a comment message and select the desired recipient either from the list or select **Add Recipient**

Records found: 6   Show comments for   Purchase Order ▾   +

ADD COMMENT   ✓   ✕

Was this item received?

977 characters remaining   expand | clear

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) Add recipient

☐ BEA YANG THAO <accountspayable@uwgb.edu>

☐ MARY KATE ONTANEDA (Prepared by, Prepared for) <ontanedm@uwgb.edu>

☐ TORY W ORTSCHEID <ortschet@uwgb.edu>

Attach file (optional)

Attachment Type   ● File   ○ Link/URL

File Name   [   ]

File   [Choose File]   Upload your file

Search for the intended recipient by name or email address and select search

Select the **+** next to the person's name to add them as a recipient of the comment

The person will be added as a recipient with a green check mark next to their name.

Select the blue check mark to add the comment to the PO which will also send the email notification o the recipient.