



UWL BUYING GUIDE

ShopUW+ Non-Catalog Item Request

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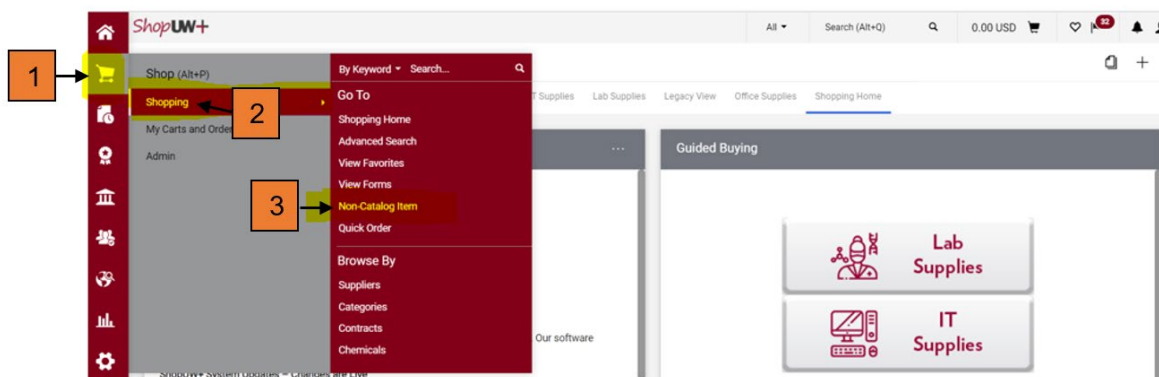
Entering a Non-Catalog Item Request in ShopUW+

❖ Request a quote from the supplier

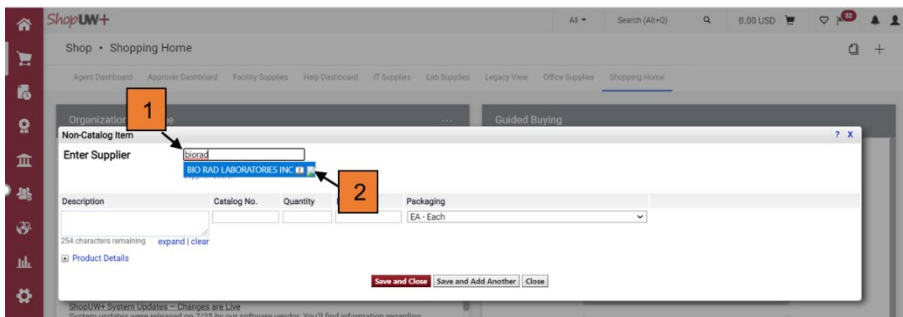
- If quote is over \$5,000 contact Purchasing Services before proceeding:
 - Shelle Gholson: sgholson@uwlax.edu, x8501 or Microsoft Teams
- **TIP:** The quote should include shipping information.
- **TIP:** If the supplier's website does not provide information on how to request a quote, call the supplier to ask or ask in a Live Chat session.
 - Some suppliers do not have their quote option listed on their website, but will take your information over the phone and email a quote to you.
 - Ask about educator discounts if that is not initially offered online or via phone/chat!

❖ Enter the quote into ShopUW+ as a Non-Catalog Item request.

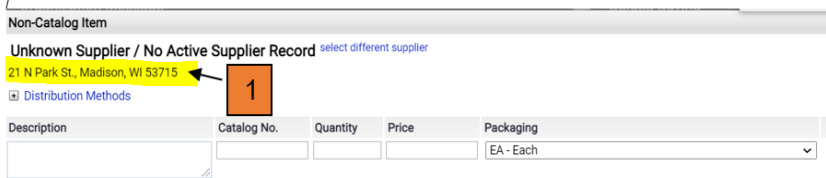
To start the request, click on the links in the order shown below.



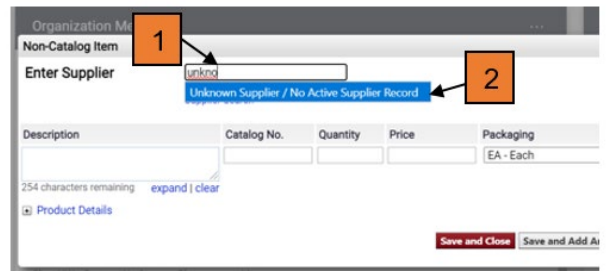
❖ Enter the supplier name and select the supplier pop-up.



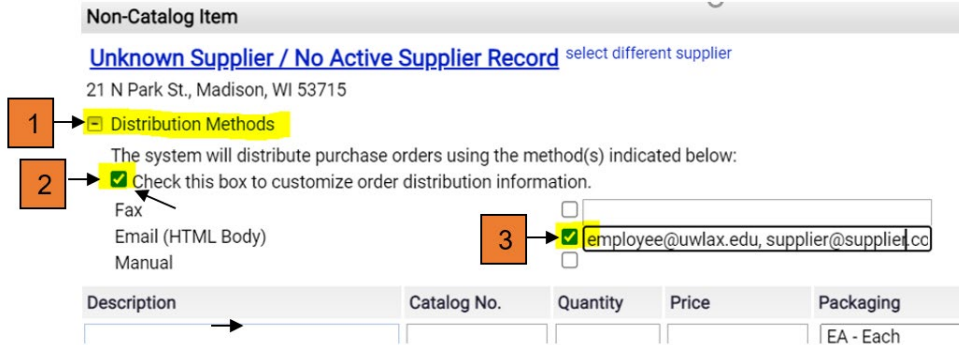
- **TIP:** Correct Supplier? If unsure it is the correct supplier, (i.e., name matches but the supplier address on your quote does not match the address on the ShopUW+ supplier), move forward with selecting the ShopUW+ supplier. Purchasing Services will verify the supplier and correct if needed.



TIP: Supplier not found? If the supplier does not pop-up in ShopUW+ when you type in their name, you can select 'unknown supplier' and move forward with selecting the 'unknown supplier' that pops up. Purchasing Services will add the supplier to the request.

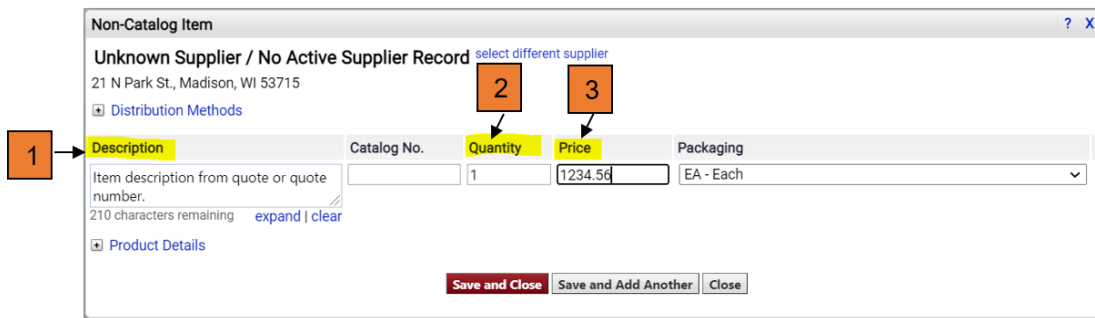


- *TIP: Who should get the Purchase Order? (OPTIONAL) Use the Distribution Methods section to let Purchase Services know how to distribute your PO (email addresses, fax number). Click on the + to enter distribution information.*



❖ **Enter item [1] Description, [2] Quantity and [3] Price.**

(OPTIONAL) Update the Packaging field. Leave the Catalog No. field blank.



Attach the Quote.

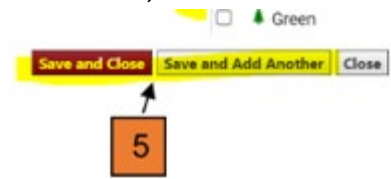
Click on [1] Product Details and [2] Click Add Internal Attachments to add your quote to the request. Click on the [3] Commodity Code magnifying glass to search for a commodity code. [4] (OPTIONAL) Click on the applicable boxes.

TIP: Commodity Code? Take your best guess. Purchasing Services will update if necessary.



Save or Add Additional Items.

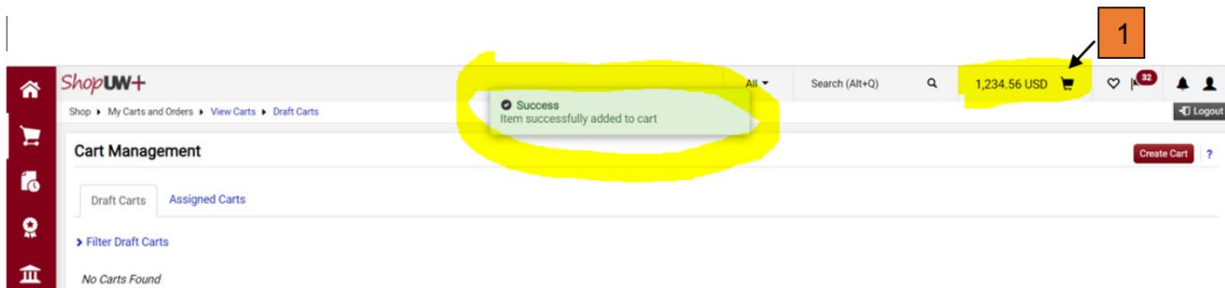
Click on [5] 'Save and Close' OR if you have additional items to add, such as freight/shipping, click on 'Save and Add Another'.



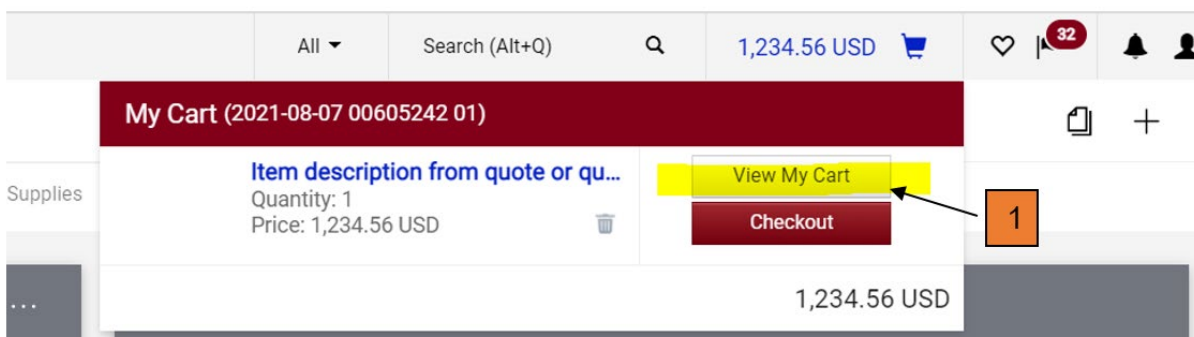
- **TIP:** Freight/Shipping must be on a line of its own. You can enter an estimated amount for shipping and adjust when you are invoiced (see Change Requests).
- **TIP:** If you have a quote with many items all to be charged to one funding string/account, you can enter one line for the items using "Items/Service per Quote number XXXX" as the description.
- **WARNING:** When adding additional items, do not change the supplier. Non-catalog item requests should be submitted one supplier per request.

Save and Close.

After entering your final item click 'Save and Close'. You will receive a Success message. To go back to your cart to finish your order, [1] click the cart symbol in the upper right corner of the screen.

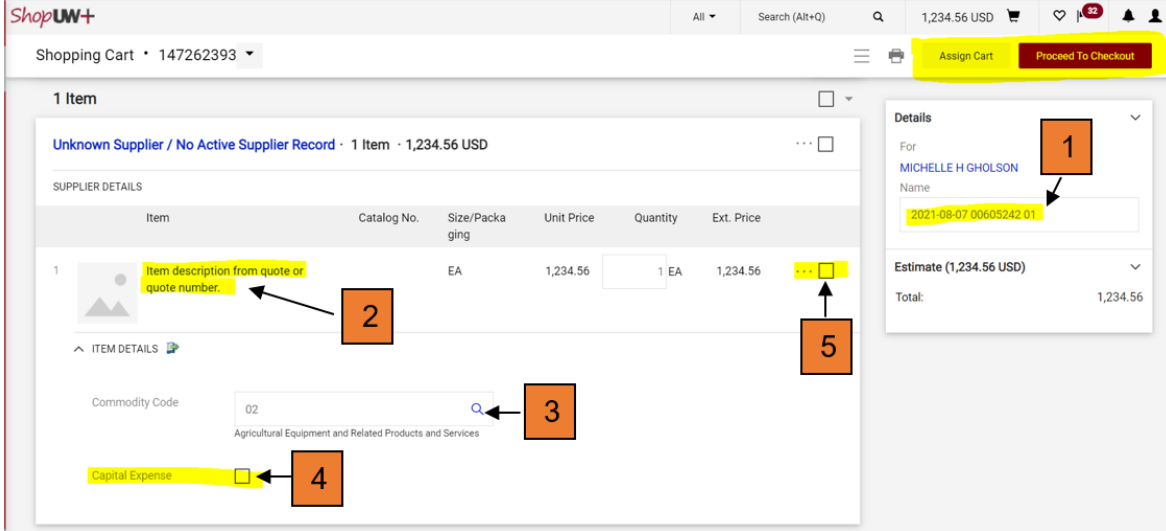


❖ Click View My Cart



Rename Cart.

Rename your cart [1] by deleting the system generated numerical name and typing in a name that will help you identify the order. This will also help identify the order if you want to re-order the same item(s).



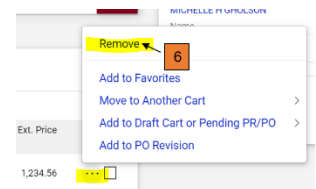
(OPTIONAL) If updates are needed to Description, Price, Quantity or Packaging click on [2] item description.

(OPTIONAL) If an update is needed to Commodity Code click on [3] the magnifying glass.

Capital Expense notification.

If an individual item is priced \$5,000 or more, click the [4] Capital Expense box.

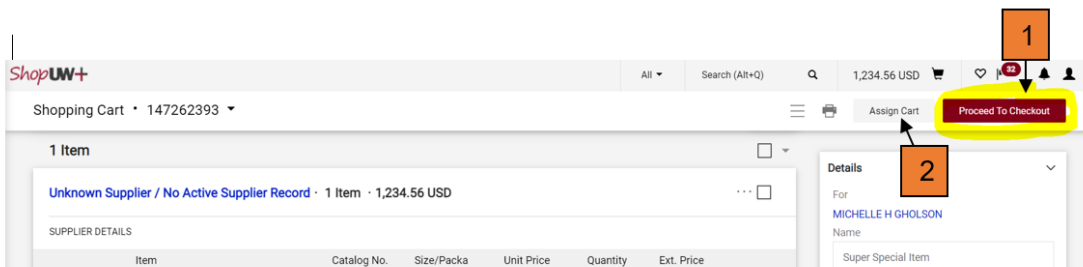
(OPTIONAL) To remove the line item from your cart click [5] the three dots and select [6] Remove.



IF ANY OF THE FOLLOWING APPLY, CLICK [1] PROCEED TO CHECKOUT

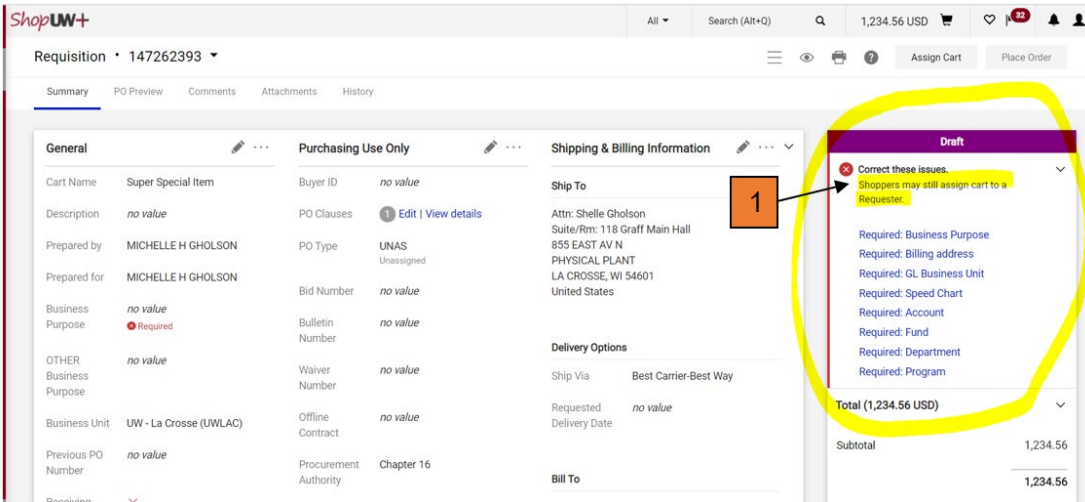
- You have funding information to enter (as opposed to your Requester entering the funding information for you).
- You have instructions for Purchasing Services, such as shipping details.
- You have additional attachments to include.

➤ **OTHERWISE, CLICK ON [2] ASSIGN CART AND SKIP TO THE INSTRUCTIONS FOR 'ASSIGN CART TO REQUESTER' ON PAGE 7.**



(OPTIONAL): You may correct any errors fields [1] you are able by clicking on the blue text in the section circled in highlight below. Alternatively, you can click on the pencil icon in the General section and Funding section to update the data.

➤ **TIP:** You do not need to correct the errors listed before assigning the cart to your Requester.

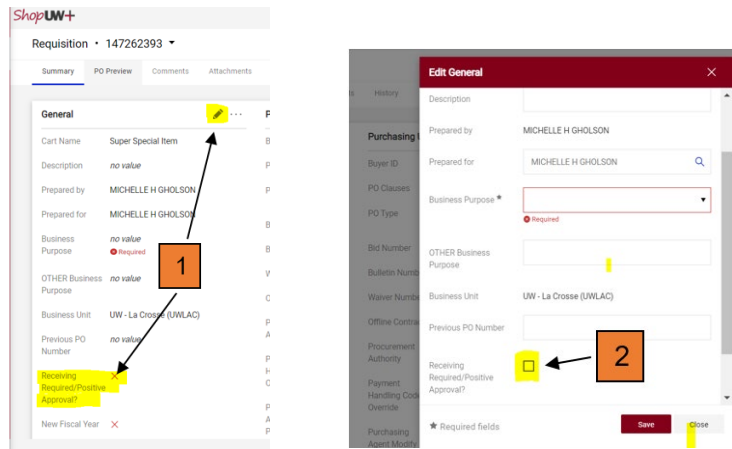


(OPTIONAL): Add Receiving Required if you want to ‘approve’ invoices related to the order, before they are paid by Accounts Payable.

- Click the pencil [1] to open up the editable fields and check the box [2] for Receiving Required.

➤ **TIP:** If you do not check the box for Receiving Required, invoices will be matched to the purchase order and paid without your approval.

➤ **TIP:** Checking the Receiving Required box will require you, or another employee, to enter a Receipt in ShopUW+ to acknowledge receipt of product/service and ‘approve’ related invoices for payment.



➤ ShopUW+ requires Receipting for any order over \$5,000. This functionality is added to the order by the system, regardless of whether the Receiving Required box is checked or not.

(OPTIONAL) To add or update the funding information, click on the [1] pencil for the Funding String section.

Enter the funding data in the fields provided, starting with the GL Business Unit, then click Save.

- **TIP:** Enter the GL Business Unit first, ShopUW+ will provide pop-ups once you begin entering text into the fields. Always select the system pop-ups to populate the fields.
- **TIP:** Funding fields tips
 - GL Business Unit: UWLAC
 - Speed Chart: leave field blank
 - Account: if unsure of the account code, use 3100 for supplies and Purchasing Services will update, if necessary.
 - Fund: three ([3] digit code
 - Department: six ([6] digit code – select pop-up with _UWLAC at end of dept. code
 - Program: one ([1] digit code – be certain you have the correct program code as the system will allow you to select any digit 0-9.

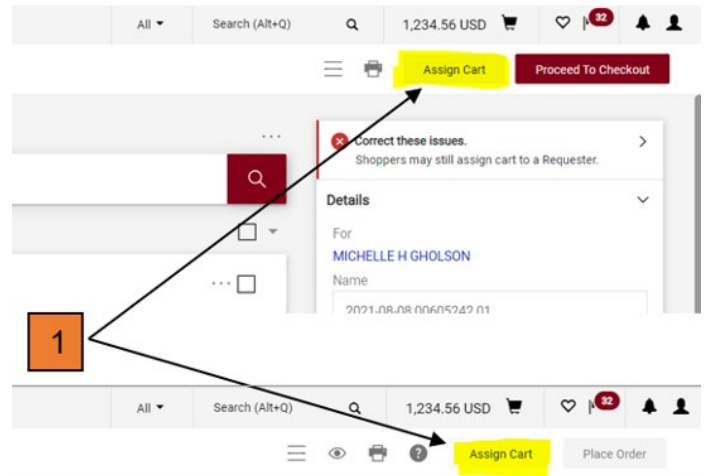
(OPTIONAL) Add Internal Notes and Attachments by clicking the [2] pencil to add a note or click the [3] Add text to add an attachment. Provide the email address of the supplier, if known, as an Internal Note.

- **TIP:** You can also add External Notes and Attachments [4] that will be added to the PO (external notes) or emailed with the PO (external attachments).

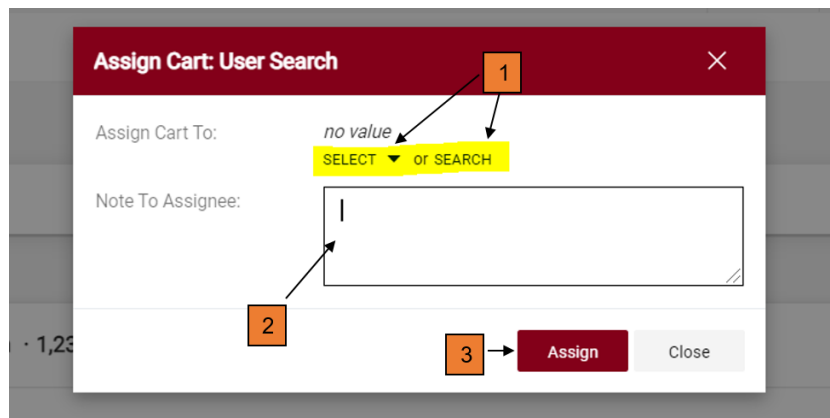
❖ Assign Cart to Requester

Select Assign Cart when you are finished updating the information on your order by clicking the [1] Assign Cart button.

- *TIP: The Assign Cart button will be in the same location regardless of whether you are assigning at the initial stage of the order (top example) or if you proceeded to checkout to add funding or other information (bottom example)*



- Select the Requester (Assignee) for your area. [1] Use SELECT if you have pre-populated your Requester information (Cart Assignee) in your ShopUW+ Profile, or use SEARCH if you have not.
- (OPTIONAL) Add a note to your Requester using [2] Note To Assignee text field.
- Click [3] Assign Cart.



Frequently Asked Questions

Non-Catalog Item Requests

✓ How do I Track requisition status/Work flow steps

- The What's Next? section of the requisition provides information on workflow status.
- You can click on each stop in the workflow to see the name of the person responsible for that action.
 - When the request was submitted
 - Approval status
 - Approval 1 = WISER manager
 - Approval 2 = (5K) Dean/Division VC
 - Approval 3 = (25K+) VC Admin & Finance
 - Department Delegated Agent
 - Purchasing Service
 - All Buyers listed = request in queue
 - Only one Buyer listed = Buyer assigned and is working on request.
 - Purchasing Review
 - Purchasing Director reviewing for approval
 - All Buyers listed = request in queue
 - Create PO
 - Purchase Order is created and dispatched.

✓ How do I request priority processing of my order?

- The ShopUW+ system does not allow for prioritization of requests. **Planning ahead to provide ample time for your request to be approved and for Purchasing Services to review and create a PO is essential.**
- If a RUSH is needed on a request, add a note when you select Assign Cart letting the Requester know the date needed and asking for prioritization of your order.

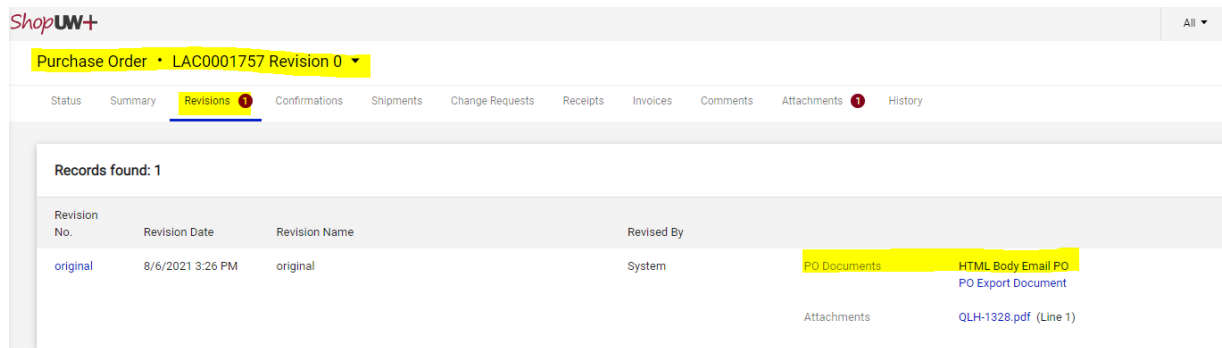
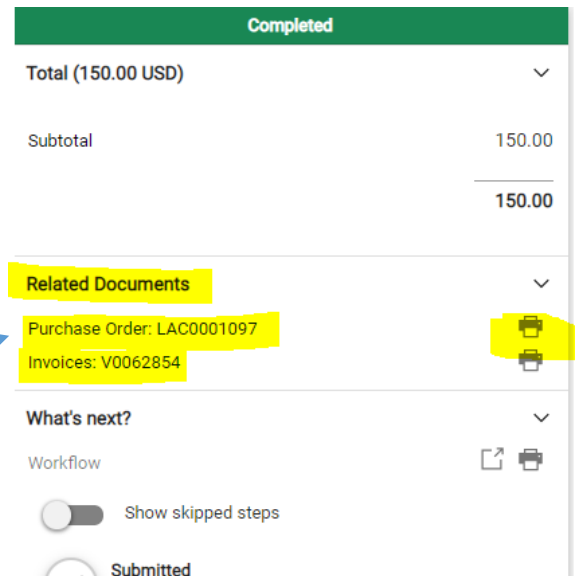
The screenshot displays a 'Pending' requisition workflow. At the top, it shows a total of 120.14 USD and a subtotal of 120.14. Below this, the 'What's next?' section is highlighted in yellow. The workflow consists of several steps, each with a status indicator (checkmark, diamond, or circle) and a name: 'Submitted' (checked, LYNNE M SMITH), 'PR Validation' (checked, Completed), 'Wait for Validation Respo...' (checked, Approved), 'Approval 1' (checked, MICHAEL L ABLER), 'Department Delegated Agent' (Active), 'Purchasing Review' (Future), 'PR Validation 2' (Future), 'Wait for Validation Respo...' (Future), 'Create PO' (Future), and 'Finish' (Future). A toggle for 'Show skipped steps' is visible. Blue arrows from the text on the left point to specific steps in the workflow.

Frequently Asked Questions (Con't)

Non-Catalog Item Requests

✓ How do I get a copy of the PO or other related documents?

- The **Related Documents** section of the Requisition provides a link to:
 - **Purchase Order (PO)**
 - Click on the printer icon to print a PO summary document
 - Click on the link for the Purchase Order to see the actual PO emailed to the supplier.
 - The PO document can be found under the Revisions tab of the Purchase Order document, along with any attachments emailed with the PO.



- Change Request, if applicable
 - Invoice(s)
 - Available once Accounts Payable enters the invoice into ShopUW+
- ### ✓ How do I place the order with the supplier myself so I can control delivery?
- Add a Comment to your Requisition indicating the PO should be emailed to you and provide your email address.
 - You can then place your order with the supplier via phone and provide the PO number for payment commitment, or via the supplier's website if there is a place to enter the PO number for payment at checkout.
- ### ✓ How do I check on the shipping status of an order
- Contact the supplier and provide the PO number of your order to inquire about shipping status.