

Ordering and Completing Non-Catalog Items

Upon completion of this topic you will be able to:

- Order a Non-Catalog item
- Complete the Non-Catalog Requisition

Procedure

Consider this Scenario:

Your goal is to order and complete a Non-Catalog cart item.

Key Information:

Vendor: Remy Corporation

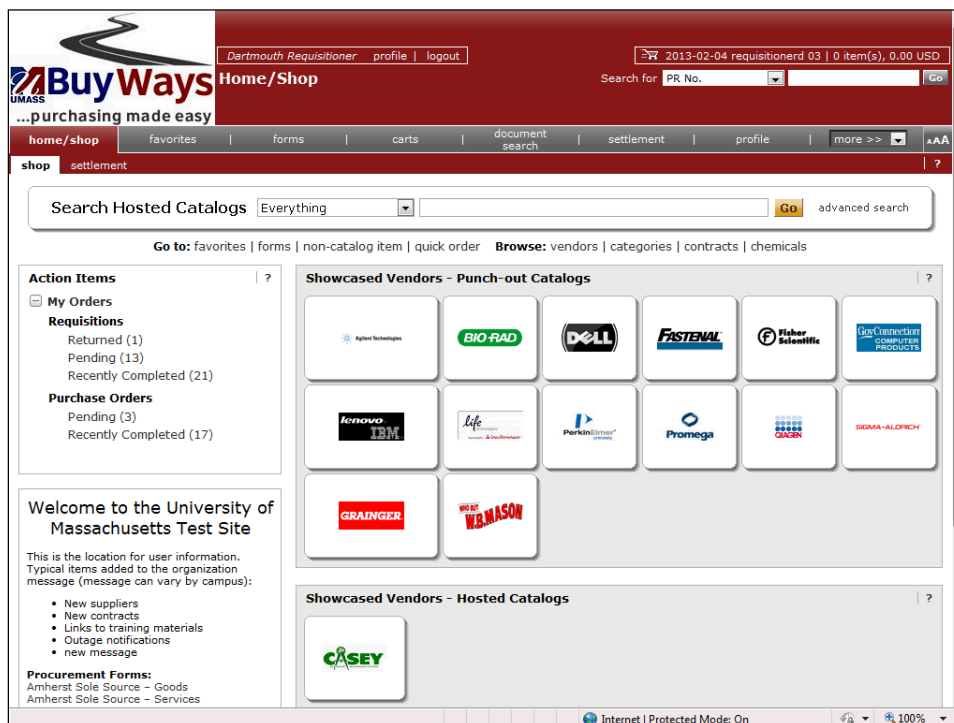
Product Description: Consulting Services

Catalog Number: NA

Quantity: 1

Price Estimate: 6000.00

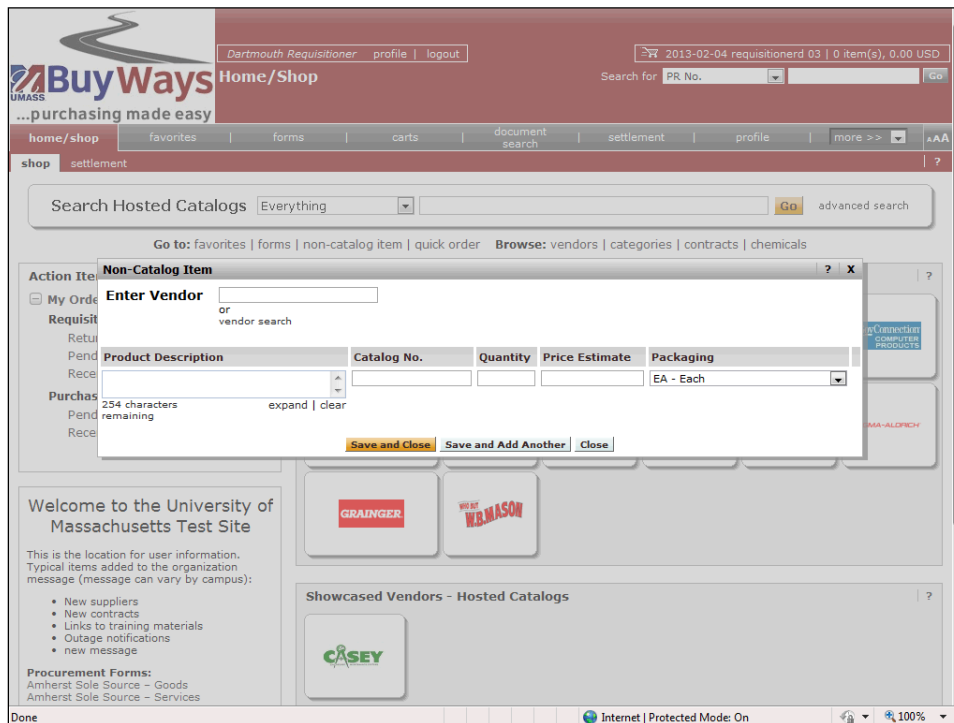
Packaging: EA



- | Step | Action |
|------|---|
| 1. | Begin by navigating to the Non-Catalog Item Form . |

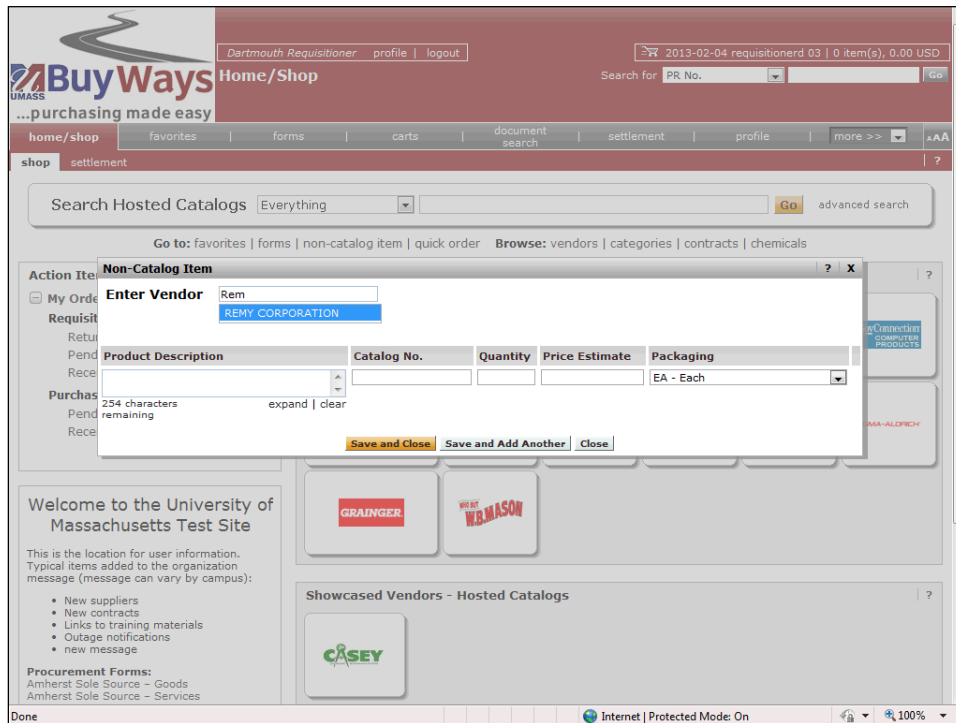
Click the **non-catalog item** link.

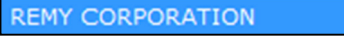
[non-catalog item](#)

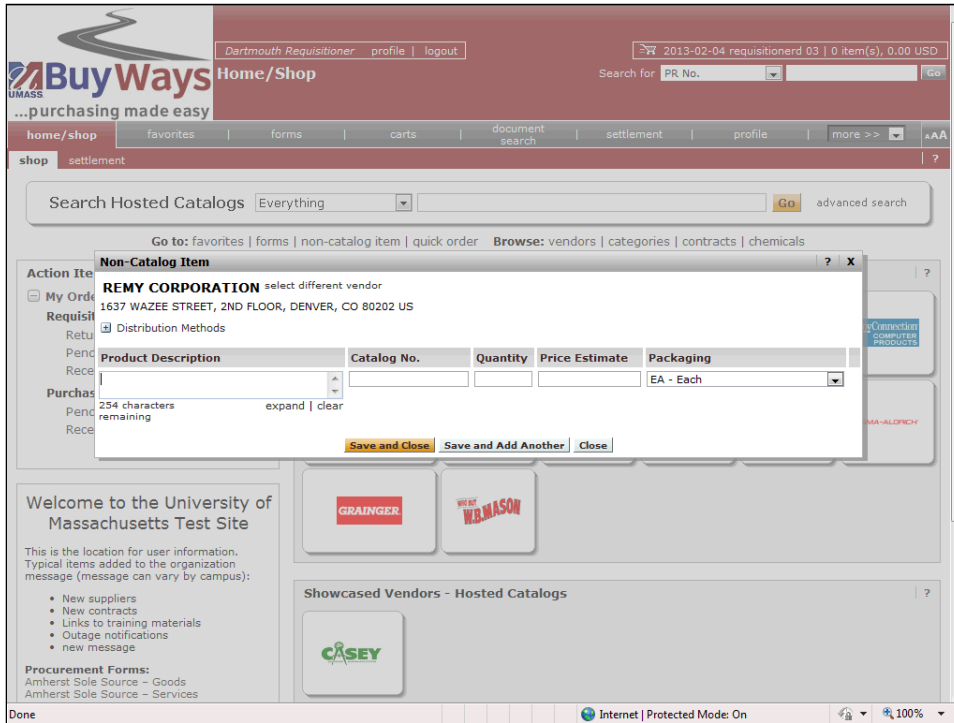


- | | |
|----|---|
| 2. | The Non-Catalog Item Order Template opens. If you know the vendor's name, you can start typing it in the Enter Vendor field and potential matches will display. |
|----|---|

Step	Action
3.	Enter the desired information into the Enter Vendor field (requires a minimum of 3 characters of vendor's name). Enter " Rem ".

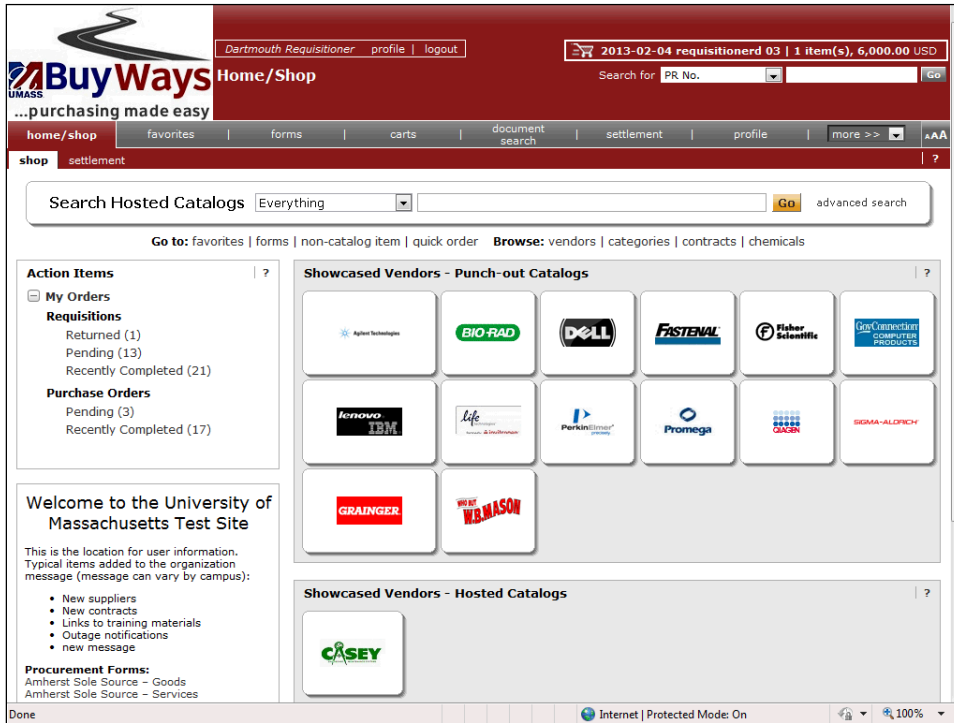


Step	Action
4.	Click the REMY CORPORATION link. 



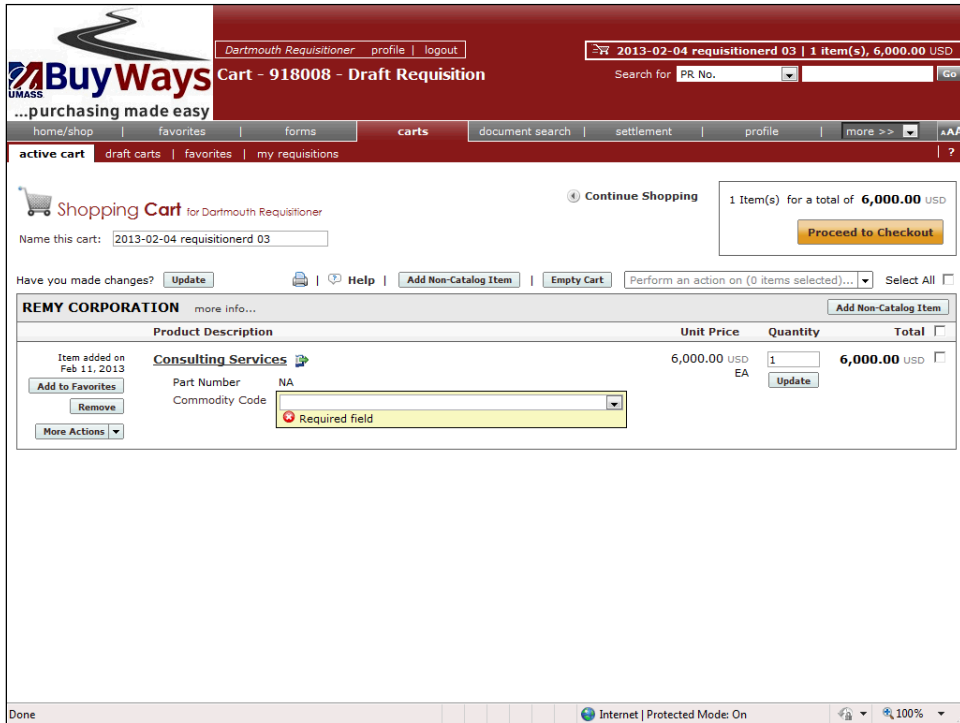
5.	Enter the desired information into the Product Description field. Enter " Consulting Services ".
6.	Enter the desired information into the Catalog No. field. If no catalog number is available, enter " NA ".
7.	Enter the desired information into the Quantity field. Enter " 1 ".
8.	Enter the desired information into the Price Estimate field. Enter " 6000.00 ".

Step	Action
9.	Since you have finished shopping, click the Save and Close button.



Step	Action
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10. To verify the items have been added to your cart, click the **shopping cart** button.



11. The non-catalog item has been added to your Shopping Cart.

12. To select the Commodity Code for this product, click the **Drop-down** menu and select the appropriate commodity.



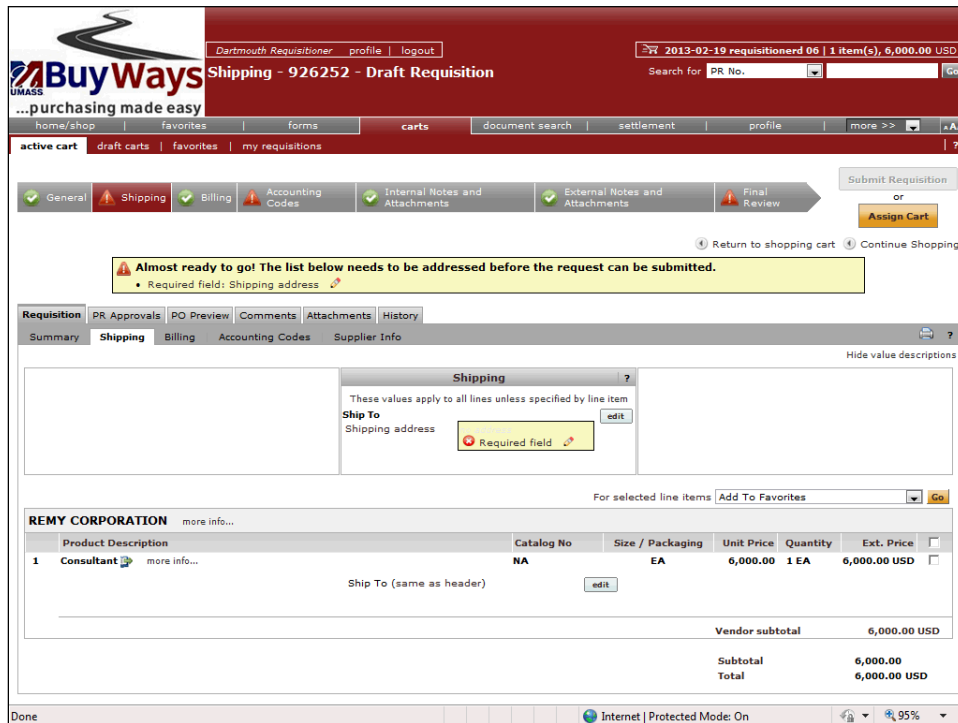
13. Click the **Proceed to Checkout** button.



Step	Action
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14. The workflow diagram indicates that this order is missing its Shipping and Accounting Codes information.

This information must be entered before submitting the request for approval.



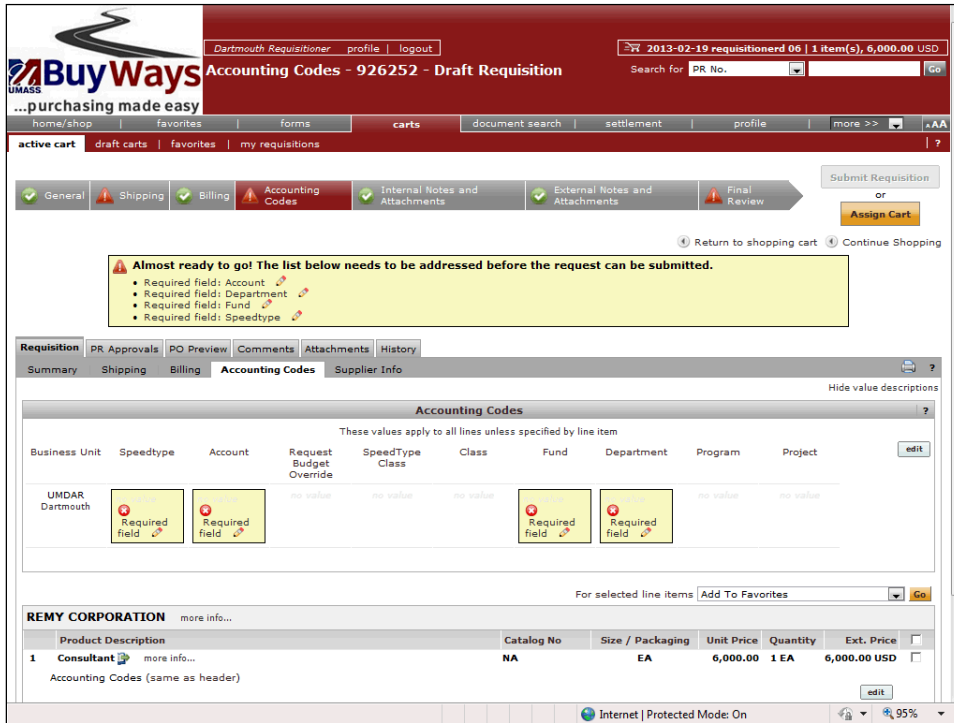
15. Click the **edit** button.



16. Click the drop-down menu list and, click the **Favorite address 1** list item.



Step	Action
17.	Click the Save button.



Accounting Codes - 926252 - Draft Requisition

2013-02-19 requisitionerd 06 | 1 item(s), 6,000.00 USD

Search for PR No. [] [Go]

home/shop | favorites | forms | carts | document search | settlement | profile | more >> | .AA

active cart | draft carts | favorites | my requisitions

Submit Requisition or Assign Cart

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account
- Required field: Department
- Required field: Fund
- Required field: Speedtype

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

Hide value descriptions

Accounting Codes

These values apply to all lines unless specified by line item

Business Unit	Speedtype	Account	Request Budget Override	SpeedType Class	Class	Fund	Department	Program	Project
UMDAR Dartmouth		Required field	no value	no value	no value	Required field	Required field	no value	no value

For selected line items Add To Favorites [Go]

REMY CORPORATION more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Consultant more info... Accounting Codes (same as header)	NA	EA	6,000.00	1 EA	6,000.00 USD

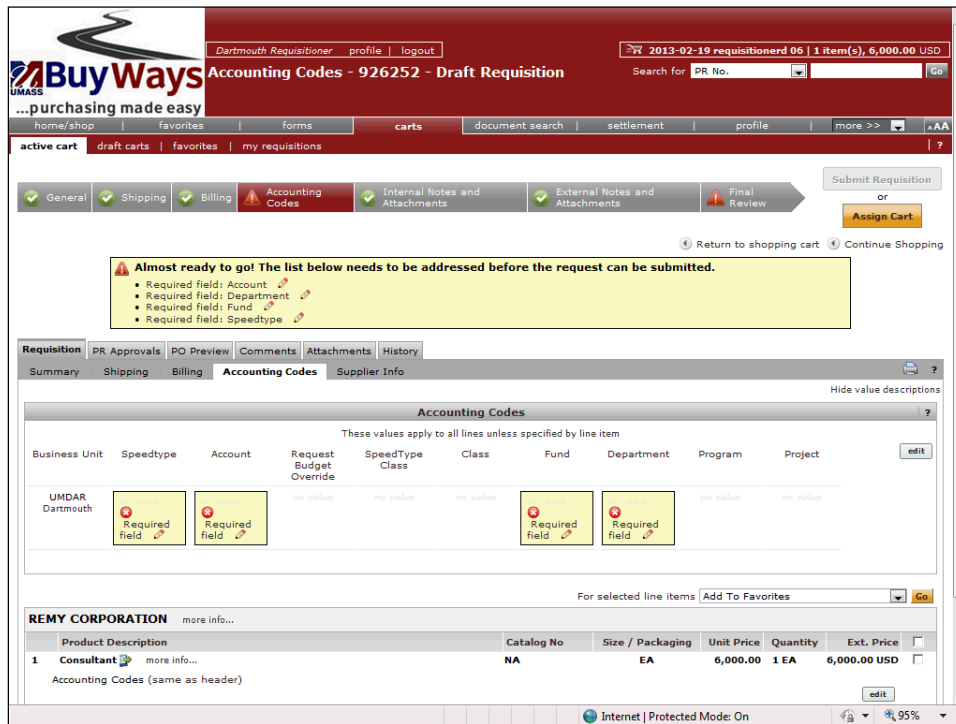
Internet | Protected Mode: On | 95%

Step	Action
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18. Add the required accounting information.

Click the **Accounting Codes** tab.

Accounting Codes



Accounting Codes - 926252 - Draft Requisition

2013-02-19 requisitionerd 06 | 1 item(s), 6,000.00 USD

Search for PR No. [input] [Go]

home/shop | favorites | forms | carts | document search | settlement | profile | more >> | AA

active cart | draft carts | favorites | my requisitions

Submit Requisition or Assign Cart

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Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info

Hide value descriptions

Accounting Codes

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Business Unit	Speedtype	Account	Request Budget Override	SpeedType Class	Class	Fund	Department	Program	Project
UMDAR Dartmouth			no value	no value	no value			no value	no value

For selected line items | Add To Favorites | Go

REMY CORPORATION more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Consultant more info...	NA	EA	6,000.00	1 EA	6,000.00 USD

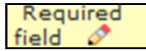
Accounting Codes (same as header)

Internet | Protected Mode: On | 95%

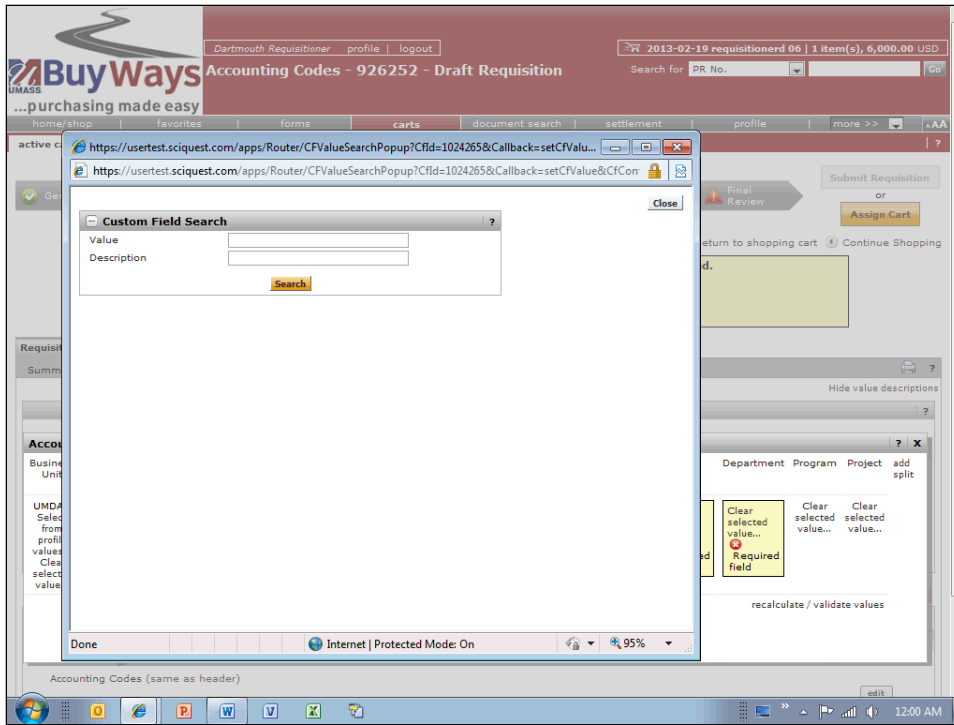
Step	Action
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19. Enter the Speedtype.

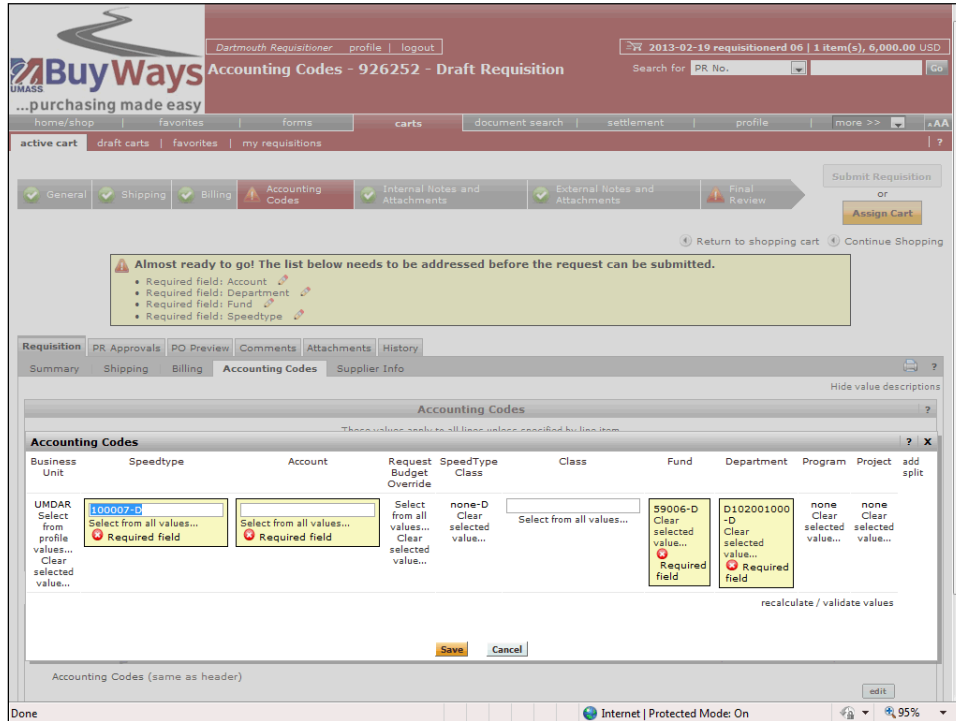
Click the **Required field** link.



Step	Action
20.	Click the Select from all values... link. Select from all values..



Step	Action
21.	Click the Search button. 
22.	Click the select link. 



Accounting Codes - 926252 - Draft Requisition

2013-02-19 requisitioner: 06 | 1 item(s), 6,000.00 USD

Search for PR No.

active cart | draft carts | favorites | my requisitions

Submit Requisition or Assign Cart

Return to shopping cart | Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account
- Required field: Department
- Required field: Fund
- Required field: Speedtype

Business Unit	Speedtype	Account	Request Budget Override	SpeedType Class	Class	Fund	Department	Program	Project	add split
UMDAR Select from profile values... Clear selected value...	100007-5 Select from all values... Required field	Select from all values... Required field	Select from all values... Clear selected value...	none-D Clear selected value...	Select from all values...	59006-D Clear selected value... Required field	D102001000 -D Clear selected value... Required field	none Clear selected value...	none Clear selected value...	

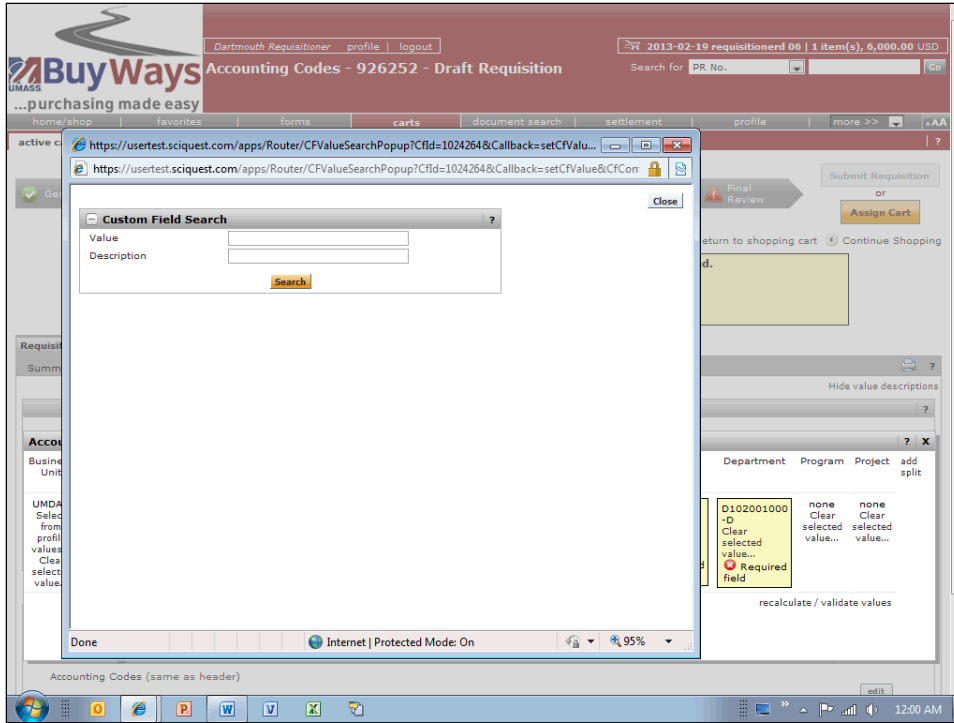
recalculate / validate values


Save Cancel

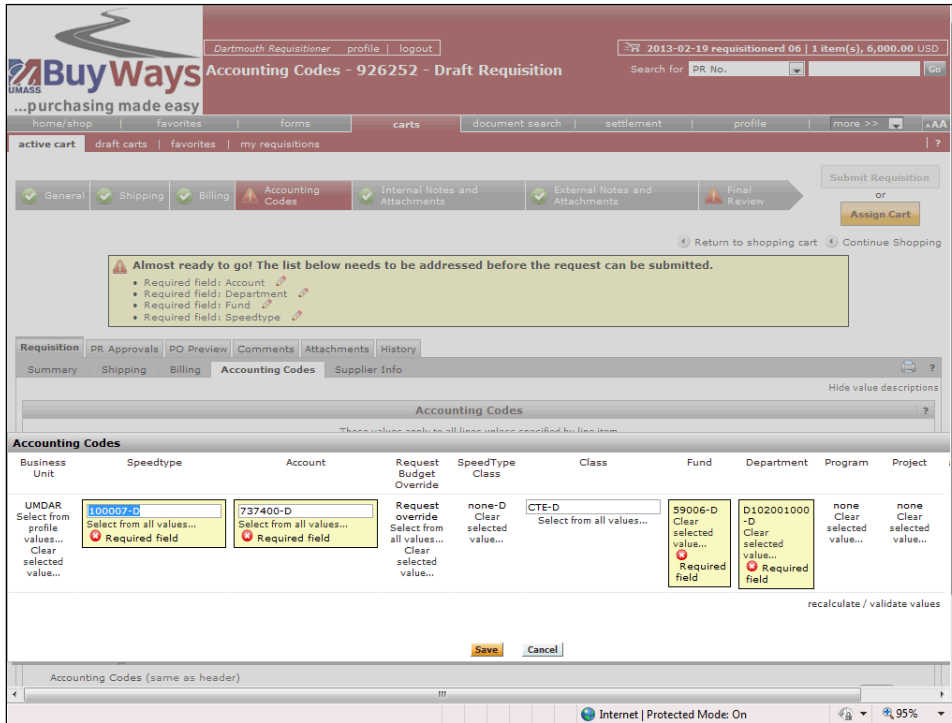
Accounting Codes (same as header)


Internet | Protected Mode: On | 95%

Step	Action
23.	To assign an Account code, click the Select from all values... link. Select from all values..

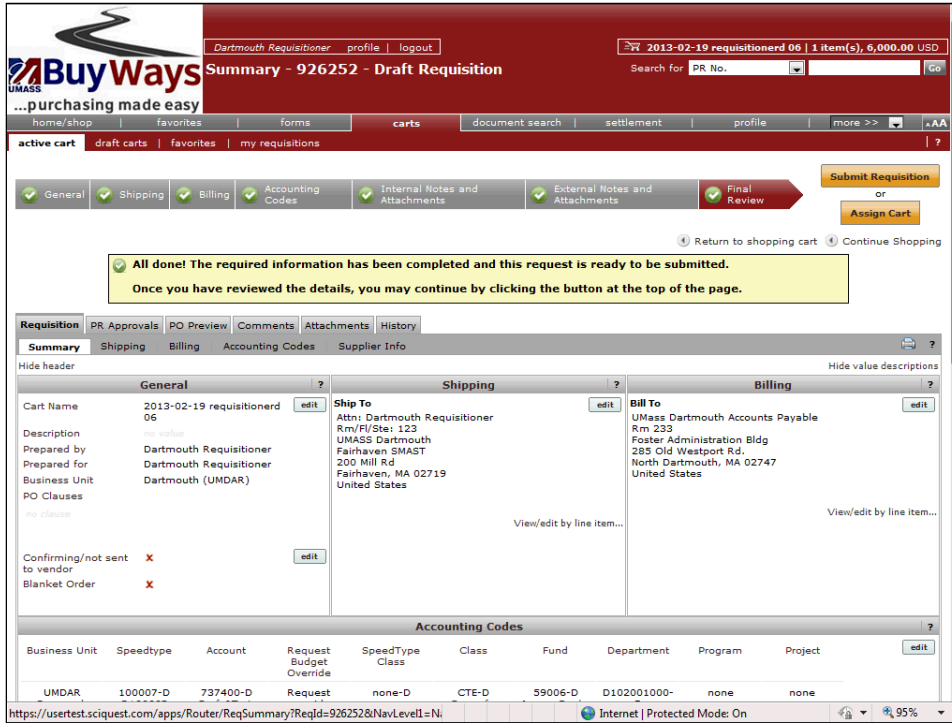


Step	Action
24.	Click the Search button. 



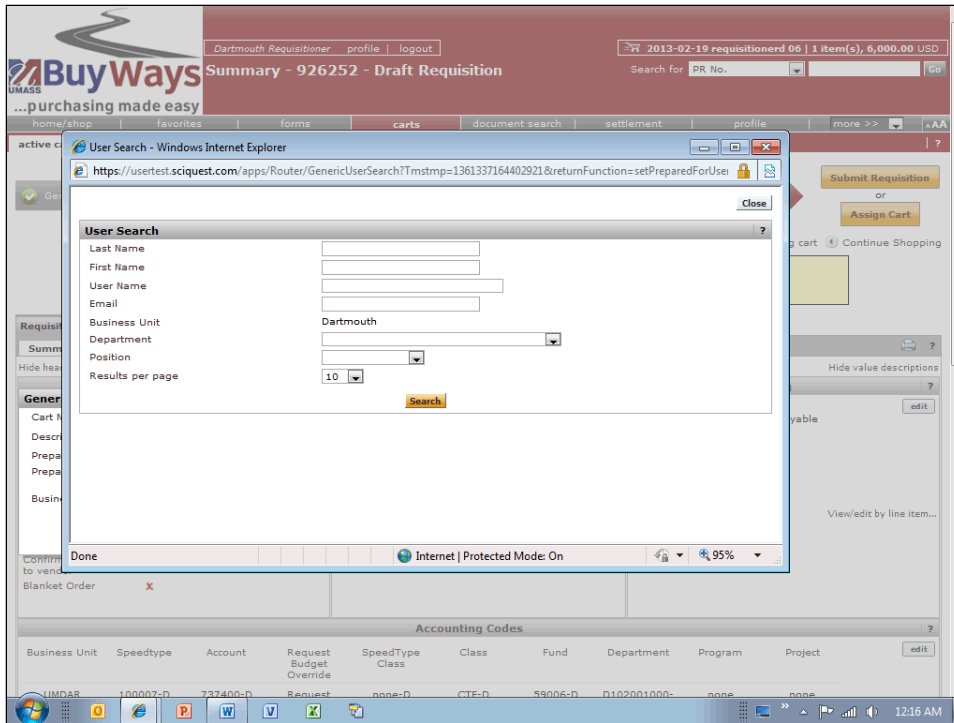
25.	You can also request a Budget Override and Class at this screen level. When done, click the Save button. 
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Step	Action
26.	Click the Summary link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Summary</div>



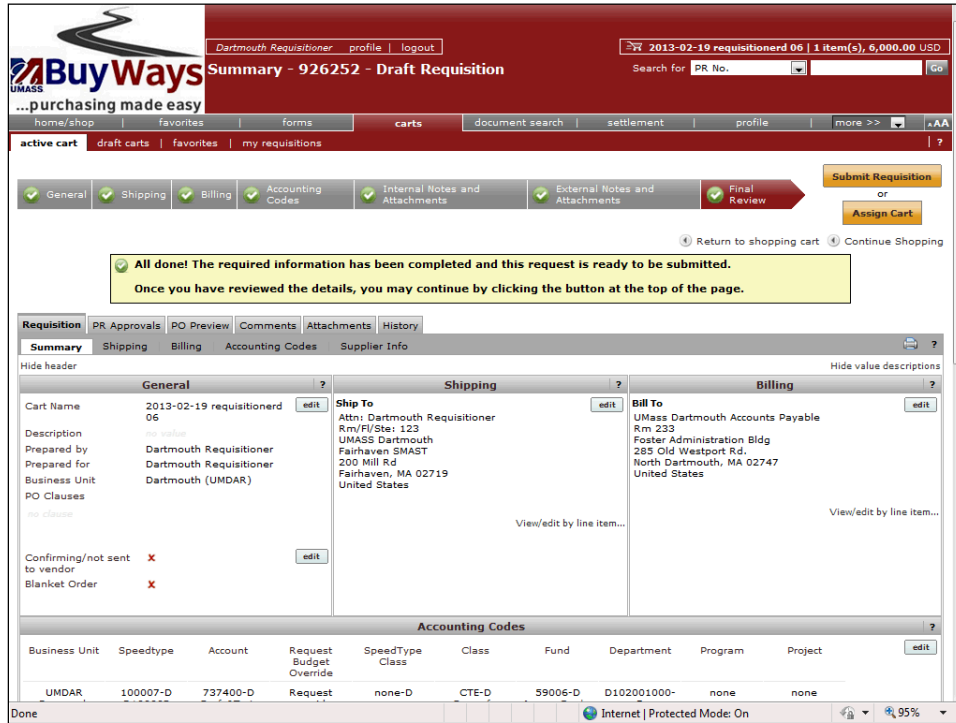
27.	The Prepared for identifier in the General Section may be changed, if the Requisitioner created the cart. Click the edit button. <div style="border: 1px solid black; padding: 2px; display: inline-block;">edit</div>
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
Step	Action
28.	To change the Prepared for identifier field, click the Select a different user... link. Select a different user...



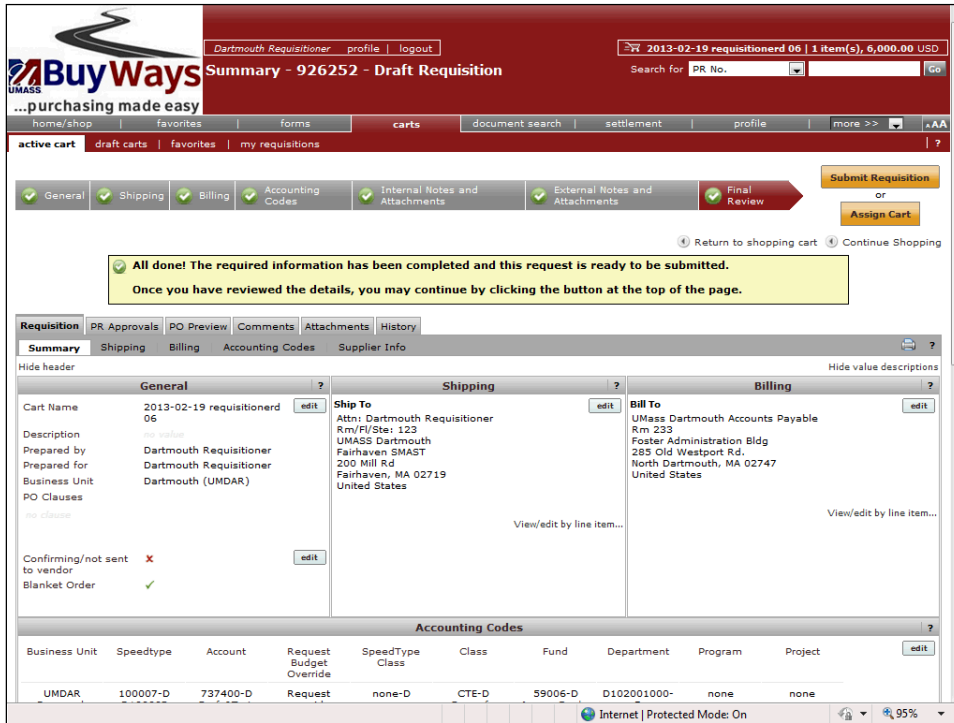
29.	Enter specific information in the User Search fields. Or click the Search button. Search
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Step	Action
30.	The General Information section also contains the Confirming/not sent to vendor and Blanket Order options.



31.	To select these options, click the edit button.
	
32.	Click the Confirming/not sent to vendor option.
	<input type="checkbox"/>
33.	Or click the Blanket Order option.
	<input type="checkbox"/>

Step	Action
34.	Click the Save button.



BuyWays ...purchasing made easy

Dartmouth Requisitioner profile | logout

2013-02-19 requisitionerd 06 | 1 item(s), 6,000.00 USD

Search for PR No. [] [GO]

home/shop | favorites | forms | carts | document search | settlement | profile | more >> | .AA

active cart | draft carts | favorites | my requisitions

General
 Shipping
 Billing
 Accounting Codes
 Internal Notes and Attachments
 External Notes and Attachments
 Final Review

Submit Requisition or Assign Cart

Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | PR Approvals | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info

Hide header

General	Shipping	Billing
Cart Name: 2013-02-19 requisitionerd 06 Description: [] Prepared by: Dartmouth Requisitioner Prepared for: Dartmouth Requisitioner Business Unit: Dartmouth (UMDAR) PO Clauses: [] Confirming/not sent to vendor: <input checked="" type="checkbox"/> Blanket Order: <input checked="" type="checkbox"/>	Ship To: Attn: Dartmouth Requisitioner, Rm/FI/Ste: 123, UMASS Dartmouth, Fairhaven SMAST, 200 Mill Rd, Fairhaven, MA 02719, United States	Bill To: UMASS Dartmouth Accounts Payable, Rm 233, Foster Administration Bldg, 285 Old Westport Rd., North Dartmouth, MA 02747, United States

Accounting Codes

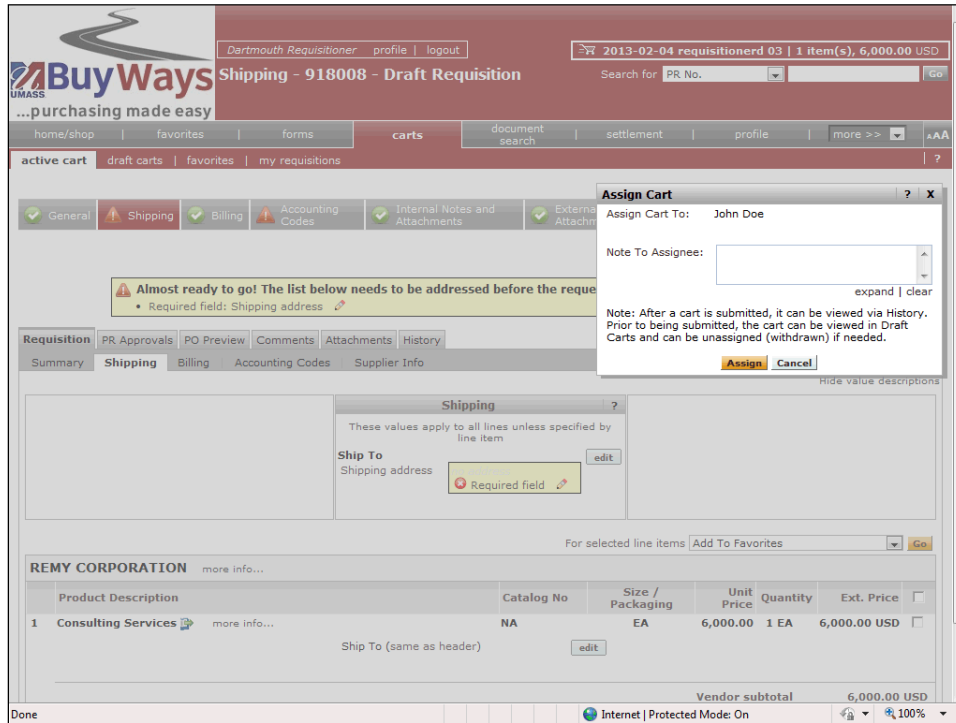
Business Unit	Speedtype	Account	Request Budget Override	SpeedType Class	Class	Fund	Department	Program	Project
UMDAR	100007-D	737400-D	Request	none-D	CTE-D	59006-D	D102001000-	none	none

Internet | Protected Mode: On

Step	Action
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35. The yellow message box informs you that the required information fields have been completed.

Click the **Assign Cart** button.

BuyWays ...purchasing made easy

Dartmouth Requisitioner profile | logout

2013-02-04 requisitionerd 03 | 1 Item(s), 6,000.00 USD

Shipping - 918008 - Draft Requisition

Search for PR No. [] Go

home/shop | favorites | forms | **carts** | document search | settlement | profile | more >> | <AAA

active cart | draft carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments External Attachments

Almost ready to go! The list below needs to be addressed before the requisition can be submitted.

- Required field: Shipping address

Requisition PR Approvals PO Preview Comments Attachments History

Summary **Shipping** Billing Accounting Codes Supplier Info

Shipping

These values apply to all lines unless specified by line item

Ship To Shipping address [] Required field []


For selected line items Add To Favorites [] Go

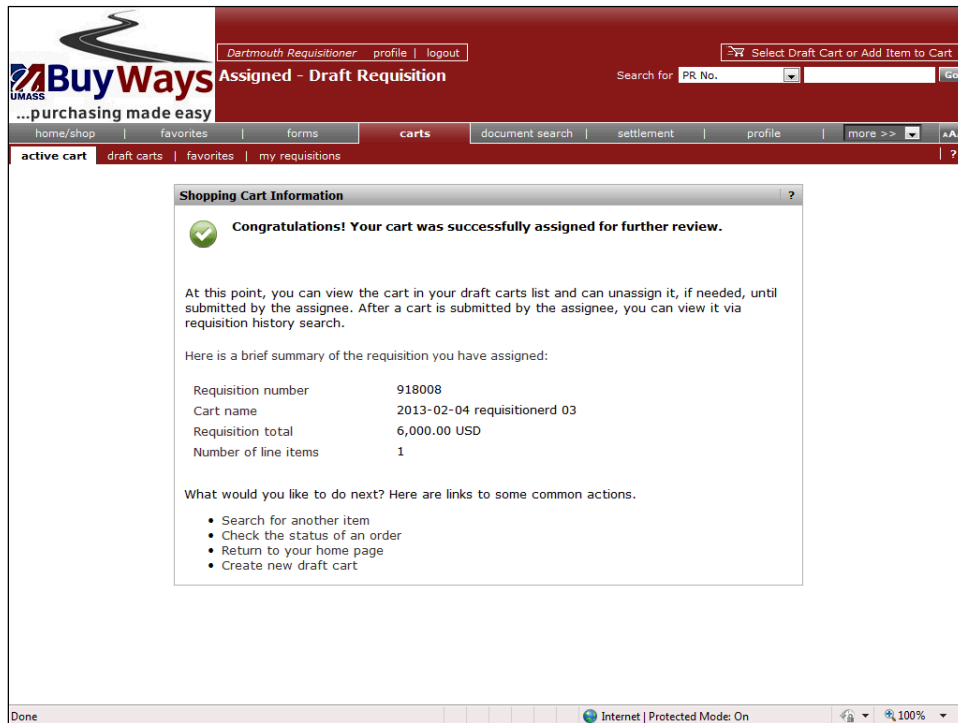
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Consulting Services [] more info...	NA	EA	6,000.00	1 EA	6,000.00 USD

Vendor subtotal 6,000.00 USD

Done Internet | Protected Mode: On

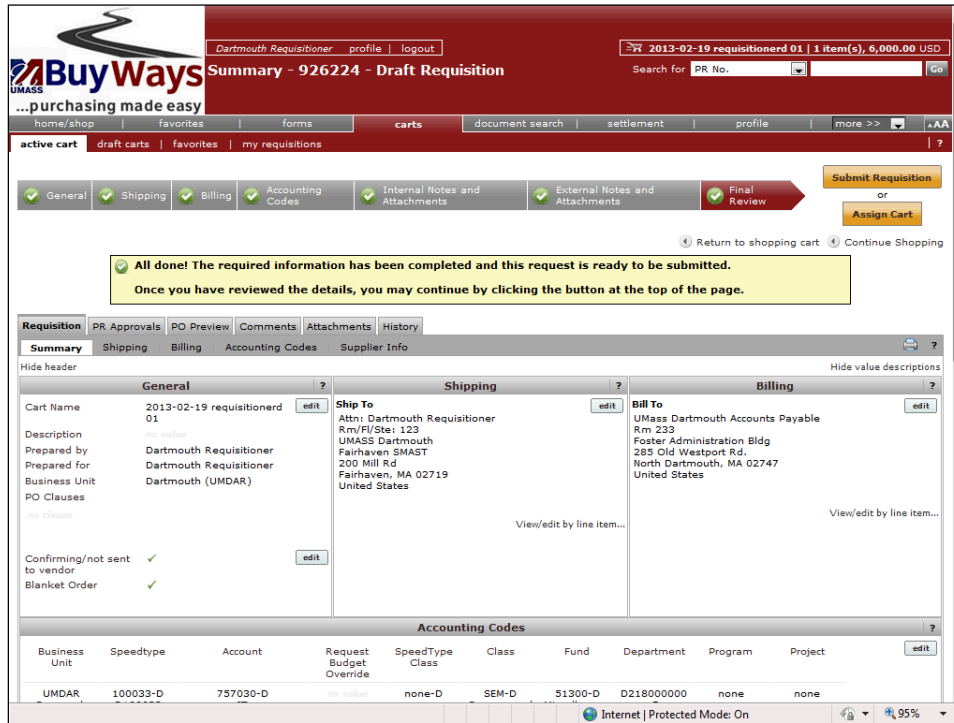
36. If you are a Shopper and you created the cart, use the **Assign Cart** box to select your Requisitioner and add instructions using the **Note to Assignee** field.


Step	Action
37.	Click the Assign button. 



38.	A message appears letting you know your cart has been successfully assigned to a Requisitioner.
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Step	Action
39.	If you have created the cart as a Requisitioner and have assigned the order to yourself and all the required information has been completed, you can submit the Requisition for approval.



40.	Click the Submit Requisition button.
	
41.	A message appears letting you know that your cart has been successfully submitted for Approval.
42.	Congratulations! You have successfully ordered and completed a non-catalog item. End of Procedure.