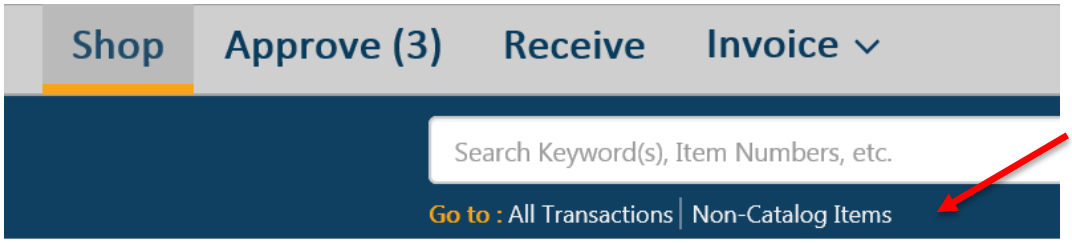
Quick Reference Sheet Non-Catalog Orders

Logging In

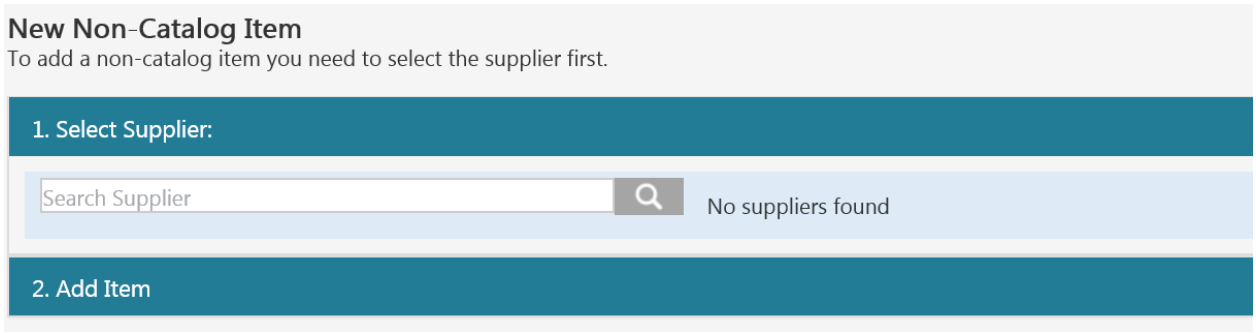
- Log on to My Western. There is a link under Technology Tools (My Western) and there is a link on the Gateway to eProcurement website under Business Services. http://www.wwu.edu/bservices/eprocure/index.shtml
- Ensure your Pop-Up Blockers are turned off. Check with your department IT for guidance on this.
- Chrome is the preferred browser.

Non-Catalog Shopping – We expect users will use this functionality instead of completing a paper purchase requisition form; the non-catalog can be used for goods or services of any type:

- Select "Non-Catalog Items" under the Search area.



- The screen will change.

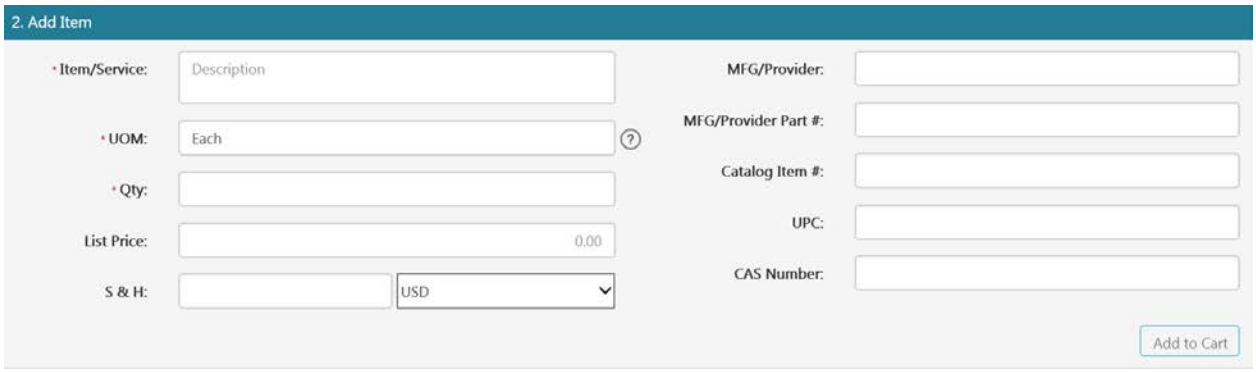


- Enter just a few letters of the Supplier's name (no need to use wildcards and this is not case sensitive) that you wish to use and hit "Go".
- A dialog box with names will appear.

- Select the supplier by clicking the "Select" button under Action. If the Select button is grayed out, this is a catalog vendor that does not accept Non-Catalog orders. To order special items from a catalog vendor there are two possibilities. If the catalog vendor is a "hosted "catalog, the vendor

must have agreed to accept non-catalog orders. These vendors will have a hyperlink underneath their logo that when clicked will take you to the non-catalog form. If the vendor is a punch-out catalog, the vendor must have the capability of loading a quote on their punch-out website. If a vendor is capable, they load a quote on their website and this quote is made available when you punch-out to their website. Contact Purchasing if you have questions.

Once you have selected a supplier the screen will change to the form where you can add an item.



- **If the Supplier is not** found and you know what supplier you wish to use, Type "**Add"** and hit "Go." A box will open that has the selection "Add Supplier to Marketplace"

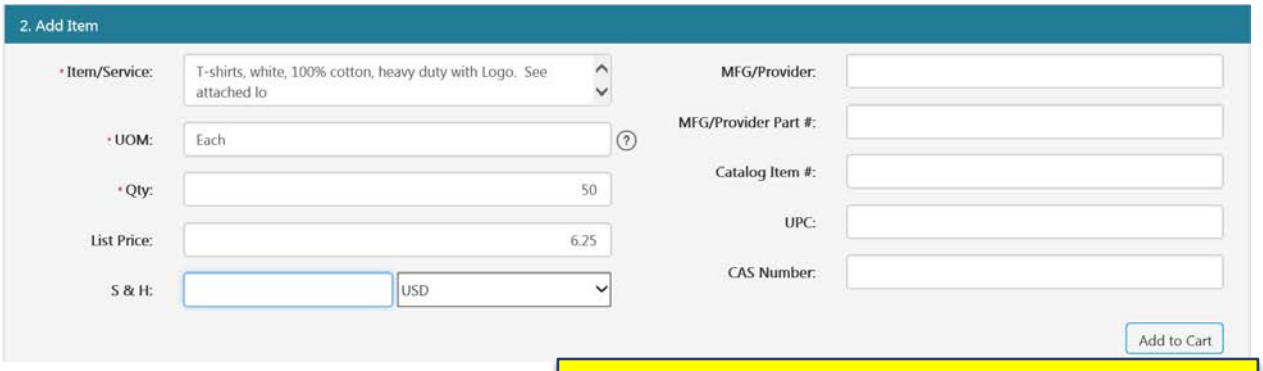
- Click on "Select." Later, when you checkout, you will add an internal note with detail (Name, address, phone and/or email contact) on the supplier you need to have added.

- You may also use **"Quote" as a supplier** if you wish purchasing to obtain a quote for you or **"unknown"** when you want Purchasing to find a vendor.

Order with Five or less Line Items from a Single Vendor:

(If your order is more than five lines skip to Page 3.)

- Once you have selected a supplier the "Add Item" area appears.



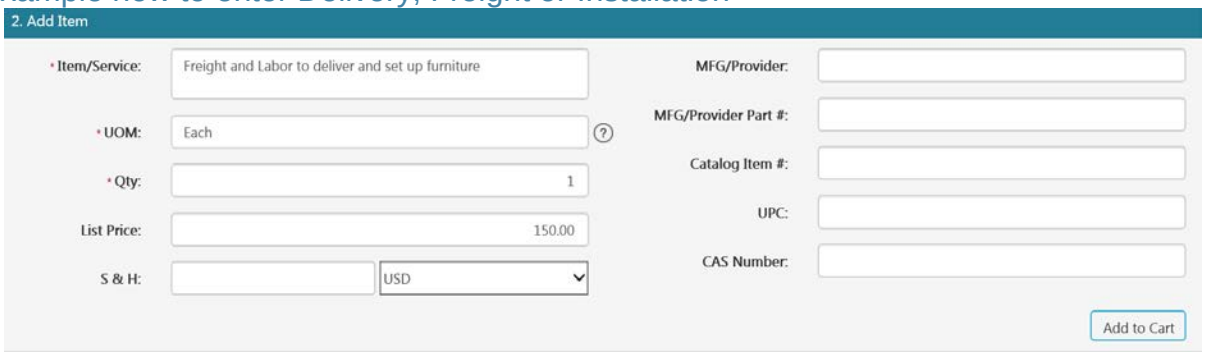
- Complete the Required* fields

Keep UOM as "Each" and Leave S&H Blank! Add freight or installation as a Separate Line as shown below!

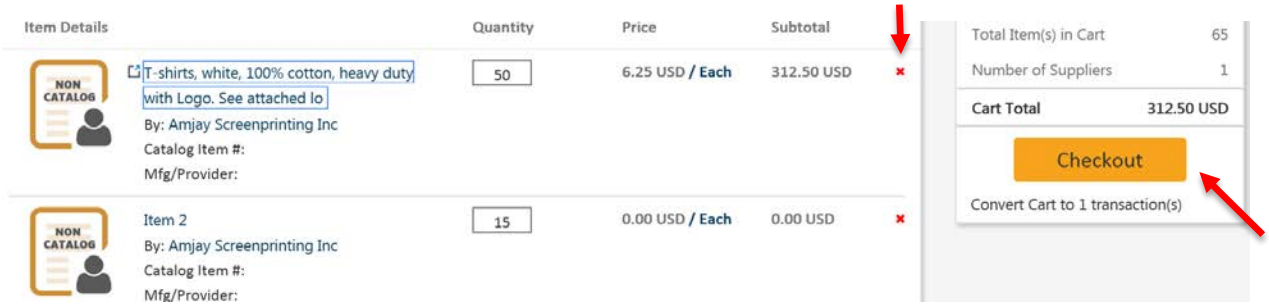
*Item/Service
*UOM - Leave UOM (Unit of Measure) as Each.
*QTY (Quantity)
List Price – enter a price if you have on.

Always leave the S&H area blank. If you have freight, delivery or installation charges you will need to enter it as a line item.
The other fields are optional – but if you have information please fill it in.

Example how to enter Delivery, Freight or Installation



- When you have added all the desired items, click the **"Cart"** tab near the top of the page. You will see all the items you have put in your Marketplace Cart. If there is an error you will have to click the red "X" to delete the incorrect item and start over. Click the "Checkout" button next to "Convert Cart to 1 transaction(s)". Your order will then be moved to the Checkout Tab.

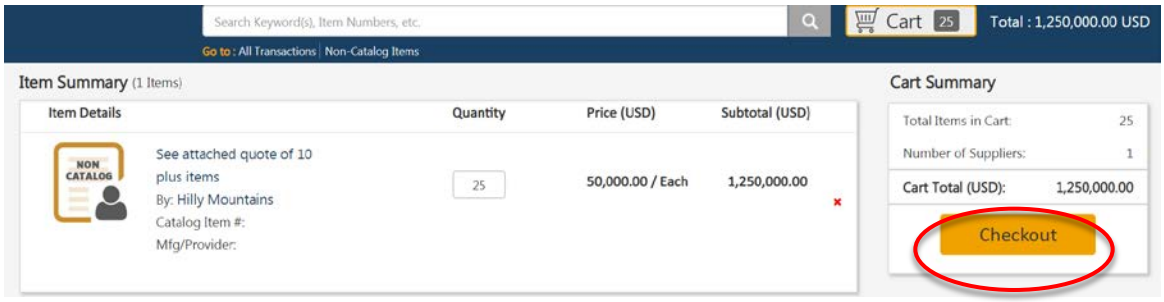


- Proceed to **Checkout.**
- **In you need help in the Checkout, Receive or Approve processes consult the appropriate guide document.**

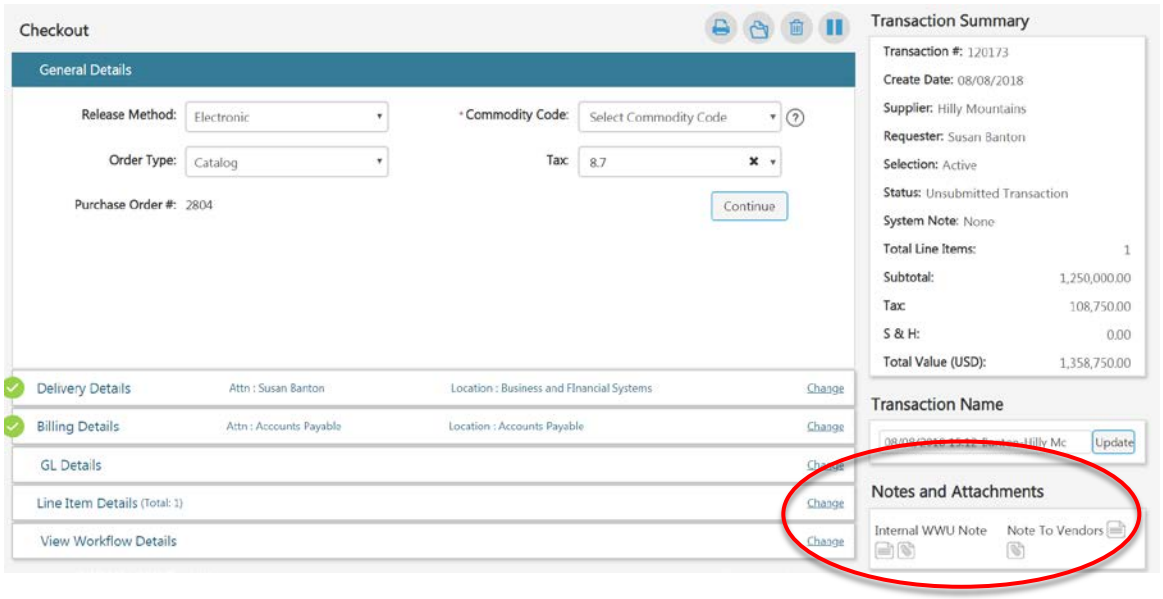
Six or More Line Items from a Single Vendor

When you have a larger order you have a choice of completing the order or forwarding the order to purchasing to complete the line detail. If you forward to purchasing, they will complete the line detail and return the order back to you to complete the checkout process and request approval.

- Requester creates one line which is essentially kind of a placeholder. Click "New Item", a Product Detail dialog opens (see above). Under Item/Service state see attached quote or listing, Qty can be entered as 1 and if you have it, show the total dollar value of the order in the List Price box. Click "Add to Cart".
- Click the "cart" tab near the top of the page. You will see your placeholder item, click the Continue button next to "Convert Cart to 1 transaction(s)"
- Click "checkout" tab near the top of the page.
- For Non-Catalog Orders where Purchasing is going to enter the order detail, the process is different from the way a catalog order or non-catalog order with five items or less is handled. The Requester forwards the transaction to a Buyer in Purchasing. The Buyer will review the order, verify pricing if requested and complete the entry of the line items and will then send it back to the Requester.



- Under Notes and attachments

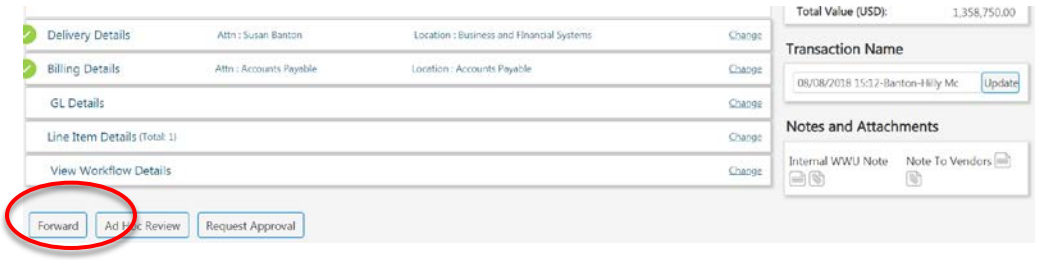


- Internal WWU Note – The paper clip is a note and the icon with a folded corner is an attachment. Place your cursor over the icon and it will be labeled. Notes and attachments are two separate functions.

- The Requester needs to **provide the additional information** to allow Purchasing to complete the order. If this was a vendor that was not found, (**Add Supplier to the Marketplace**) click the Internal WWU Note, "add" and **provide name, address and contact info** so that Purchasing can process a vendor add in both Banner and the Marketplace. Setting up a new vendor may delay your order 3-4 days as Purchasing cannot set up the vendor until the vendor provides the necessary information.

- Requester also **needs to attach** the detail for the 6 or more items. This may be a **screen sho**t of a catalog view from the internet, **a quote** received from a supplier, or your own generated list. Keep in mind that orders over $10,000 in most cases require competitive bidding, the Buyer may contact you for more information about your purchase. Click "attachments" next to Internal WWU Note and this will open a box where you can upload a file from your computer.

- Note to Vendor – If this area is used for a note or attachment, the note and/or attachment accompanies the PO when the PO is sent to the vendor. **DO NOT USE TO SEND INFORMATION TO PURCHASING – USE THE INTERNAL WWU NOTE AREA.**



- After entering a note and attaching any necessary information, scroll down to the bottom of the screen select 'Forward', click Forward.
- Enter the name of the person you want to Forward the transaction to, when the name appears in blue click it, click "Continue.
- The order has now been sent to Purchasing.
- Purchasing will complete the order lines and **return** the order to the Requester so that it can be processed through the Requester's budget approval. Requester receives an email when Purchasing will forward the transaction back to the Requester.
- The Requestor goes to their checkout Tab and completes the order.

Non-Catalog shopping with a "Catalog" Vendor

There are a few catalog vendors that can also handle Non-catalog items. As of March 2017 these are Commercial Office Interiors, Open Square, Workpointe, Bellingham Ace Hardware and Staple Business Advantage (janitorial supplies only). Other catalog vendors may handle special orders through a quote process. To reach the catalogs for these vendors you click the logo. **Click the logo.**

To place a non-catalog order you click the blue hyperlink name at bottom of the logo.

Tax Exempt and Sole Source Orders

ESM Purchase Orders will always compute tax when integrating with Banner. If an item is tax exempt attach the completed, signed tax exempt forms as an **internal attachment**. Write a note to the vendor that they should not include tax on their invoice. After a Purchase Order is issued you may contact Purchasing and ask them to do a Change Order in Banner removing the tax. You may also contact Accounts Payable and provide them a heads up that the invoice should not include tax.

Sole source documents should also be completed, signed, and attached as **an internal attachment.**

Next Steps – Checkout, Approve or Receive

If you need help in the Checkout, Receive or Approve process Consult the Complete User Guide, the Receiving Guide or the Catalog Quick Reference Guide.

The most current reference guides are available at Business Services Website eProcurement Information