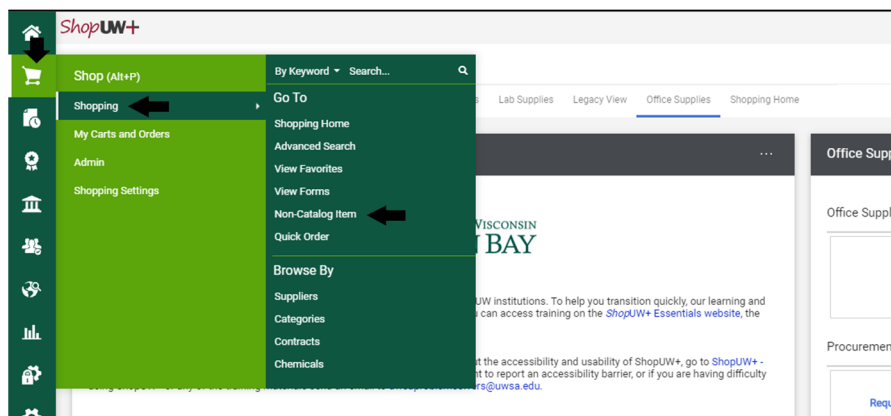


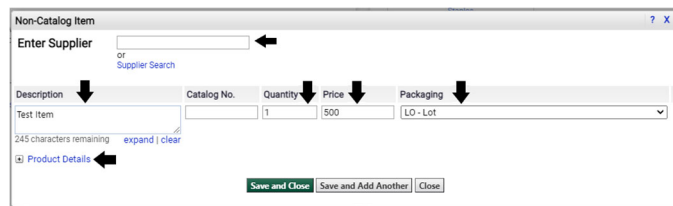
Non-Catalog Item Add (Purchase Orders)

The Non-Catalog Item Add is used for goods purchased totaling less than \$5,000, or goods purchased for state contract items. For goods purchases with a total of over \$5,000 that are not on state contract and all services, use the Requisition Wizard. If you are unsure which process to follow, use the requisition wizard. For multiple regular payments over a period of time, use the Standing Order Request.

1. From the Home Page, click on the **Shopping Cart** symbol on the left menu.
2. Under the **Shopping** menu, click **Non-Catalog Item**



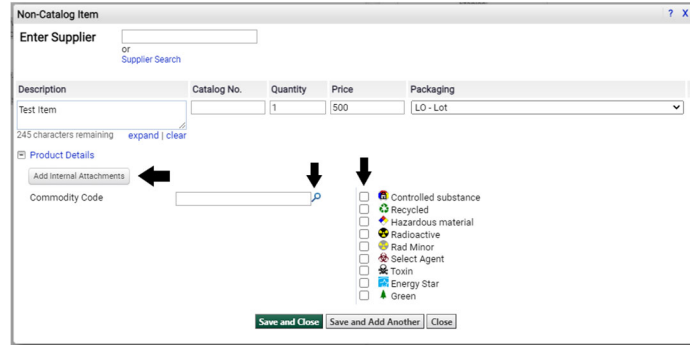
3. Enter the Supplier's name. For individuals use the last name. Select the name from the drop-down list.
 - a. If the supplier does not appear, send a W9 via Liquidfiles (<https://liquidfiles.uwgb.edu/filedrop/alexandd@uwgb.edu>) to Danielle Alexander or intercampus mail to Purchasing. Supplier set up takes up to a week. **Do not email W9s or attach to ShopUW+.**



The screenshot shows the 'Non-Catalog Item' form. At the top, there is a field for 'Enter Supplier' with a search icon. Below it, a table with the following columns: Description, Catalog No., Quantity, Price, and Packaging. The 'Description' field contains 'Test Item' and has a character count of '245 characters remaining'. The 'Quantity' field is '1' and the 'Price' field is '500'. The 'Packaging' field is a dropdown menu set to 'LO - Lot'. At the bottom, there are three buttons: 'Save and Close', 'Save and Add Another', and 'Close'. A 'Product Details' link is also visible.

4. Description – 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.
5. Catalog No. – Leave Blank
6. Quantity – Enter the quantity of items purchased. If using lot unit of measure, enter 1.
7. Unit Price – Enter the price of the item.
8. Packaging – Select appropriate unit of measure. Most common: each for individual items, or lot for an order total.
9. Click on **Product Details**.

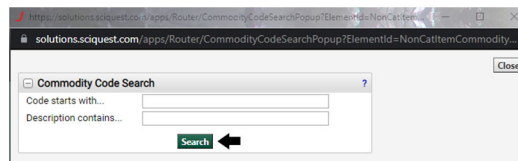
10. Add Internal Attachments – Attach PDFs of the backup for the Requisition/PO. Examples: quotes, service agreements, or invoices if available. **Do not attach a W9.** Click **Next**.



11. Click the check box if the item falls under the list of categories on the right. Optional.

12. Click the **Magnifying Glass** next to Commodity Code.

13. Leave the boxes blank and Click **Search**

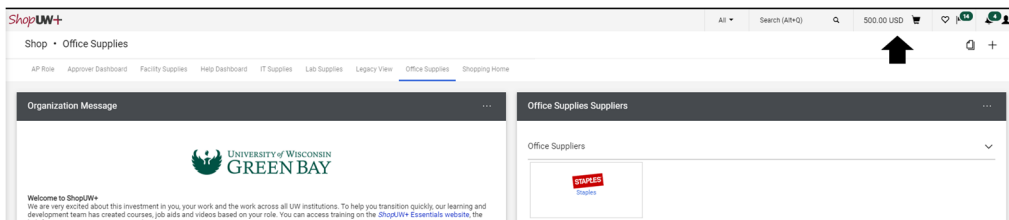


14. Click **Select** on the most appropriate code for the items you are purchasing. Note: Only select 18 if none of the other codes apply.

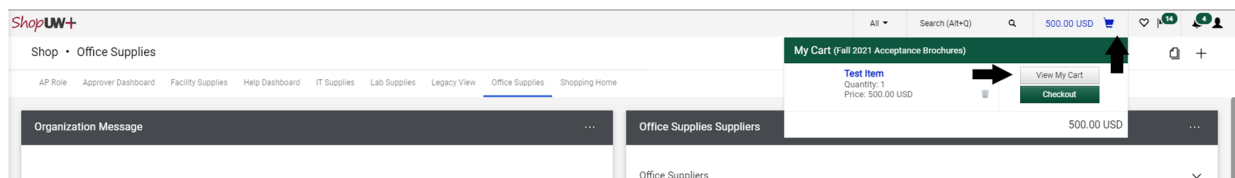
15. If you have additional items to add, click **Save and Add Another**. Repeat steps 4-14.

16. Once you have entered all the items, click **Save and Close**.

17. Click on the **Cart Icon** in the top right.

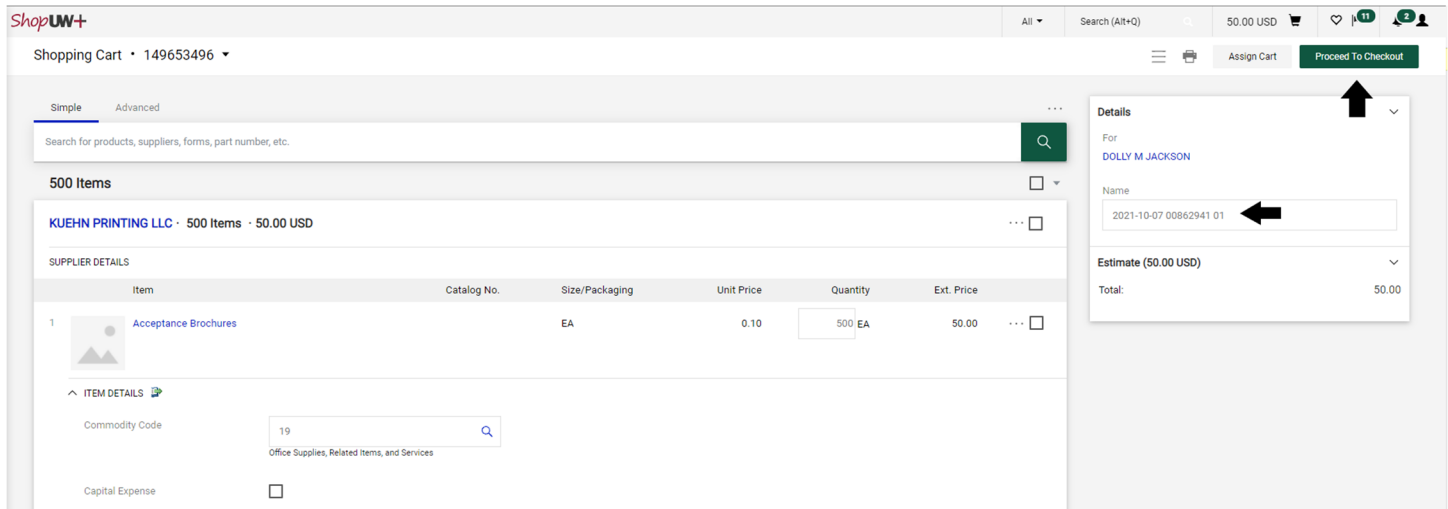


18. Click **Checkout**.



Shopping Cart

19. 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.

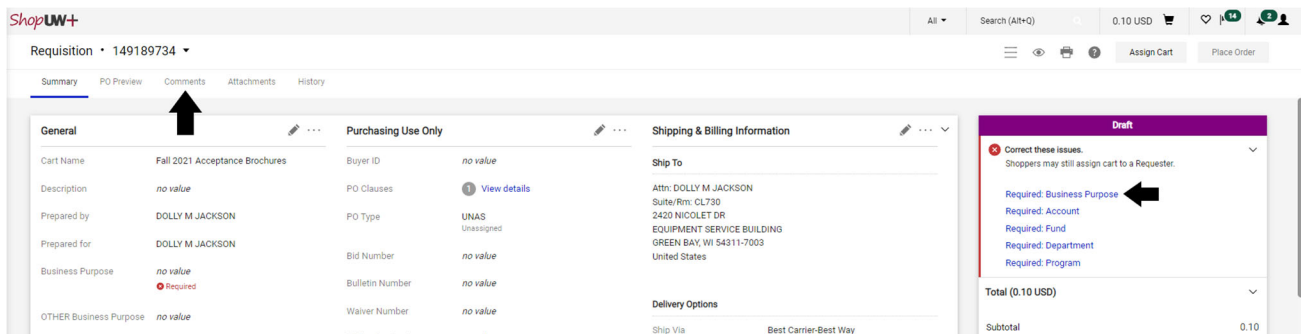


20. Click **Proceed to Checkout**.

Requisition

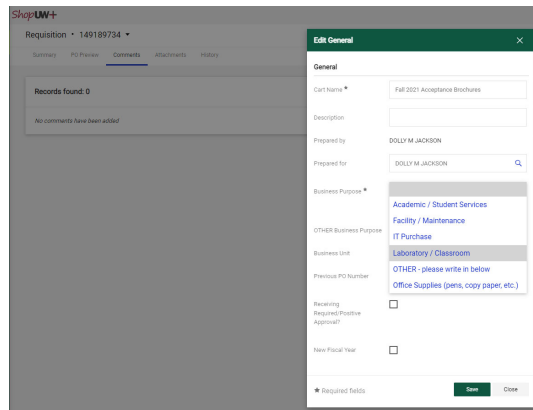
The Requisition page is where comments can be added to Purchasing, the business purpose and the funding string are entered and the final submission is done.

21. Click **Comments** tab
22. 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.



23. Click **Required: Business Purpose**

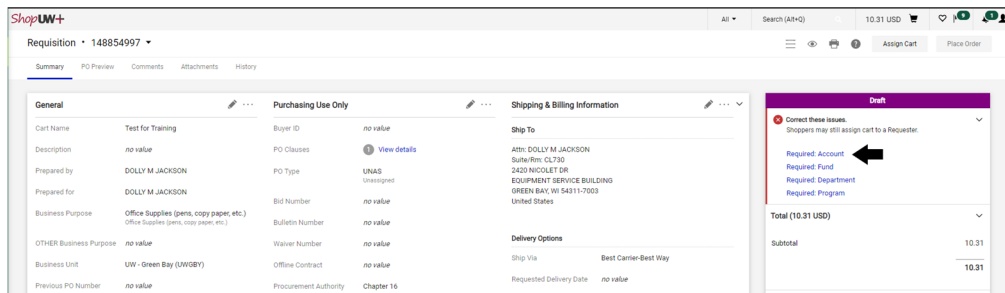
24. Select the appropriate category from the **Drop Down**



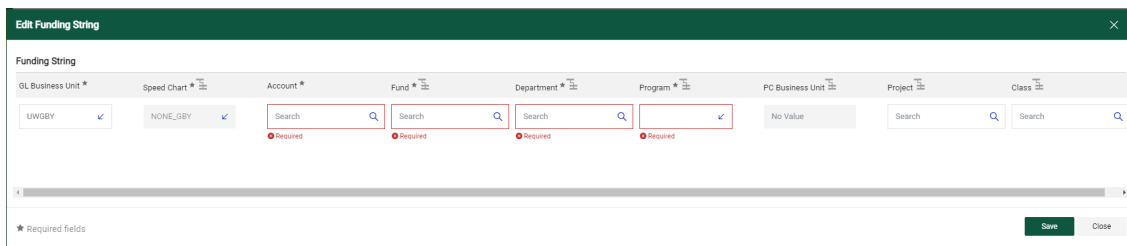
25. Click **Save**.

[Click Here for Multiple Funding Code Instructions](#)

Single funding code entry



26. Click **Required: Account**.



27. GL Business Unit – **Select UWGBY**

28. Speed Chart – Leave as NONE_GBY. This auto fills when UWGBY is selected for the GL Unit.

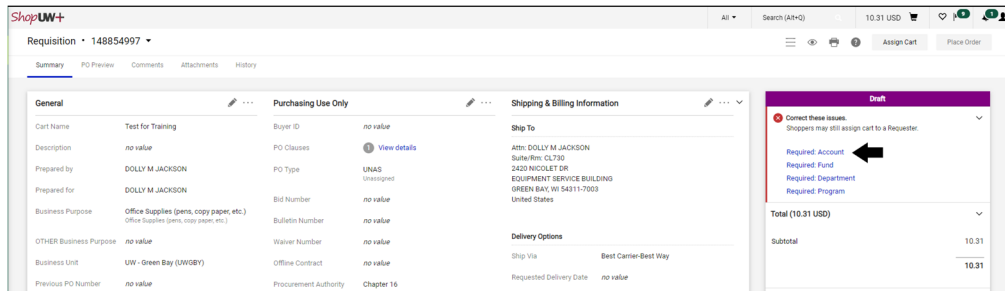
29. Account – 4-digit account number. Go to <https://www.uwgb.edu/purchasing/shopuw/> and click on **Common Account Codes** for a list of common codes.



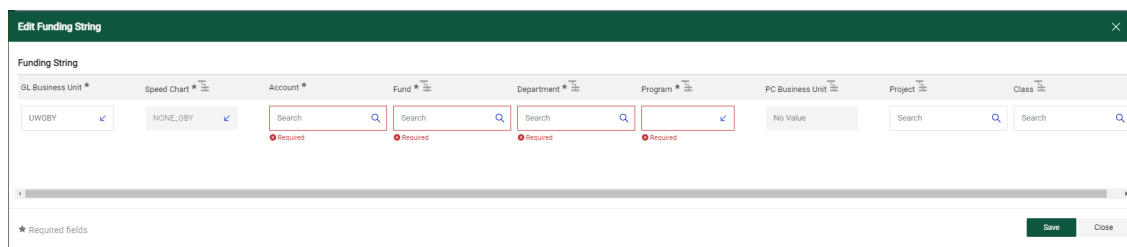
UNIVERSITY of WISCONSIN
GREEN BAY

30. Fund – 3-digit number from your funding string
31. 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.
32. Program – 1-digit number.
33. Project – Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXXXX_GBY.** You must add the _GBY to the project number. Use the Magnifying Glass to select the project.
34. Class – Only used by Athletics.
35. Click **Save**
36. Click **Place Order**
37. When invoices are received, email the invoice and any backup as a PDFs to Accountspayable@uwgb.edu and include the Requisition number or PO number. **Payments will not be processed if the invoice is not emailed to Accounts Payable.**

Multiple Funding Code Entry



26. Click **Required: Account**.



27. GL Business Unit – UWGBY

28. Speed Chart – Leave as NONE_GBY. This auto fills when UWGBY is selected for the GL Unit.

29. Account – 4-digit account number. Go to <https://www.uwgb.edu/purchasing/shopuw/> and click on **Common Account Codes** for a list of common codes.

30. Fund – 3-digit number from your funding string

31. 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.

32. Program – 1-digit number.

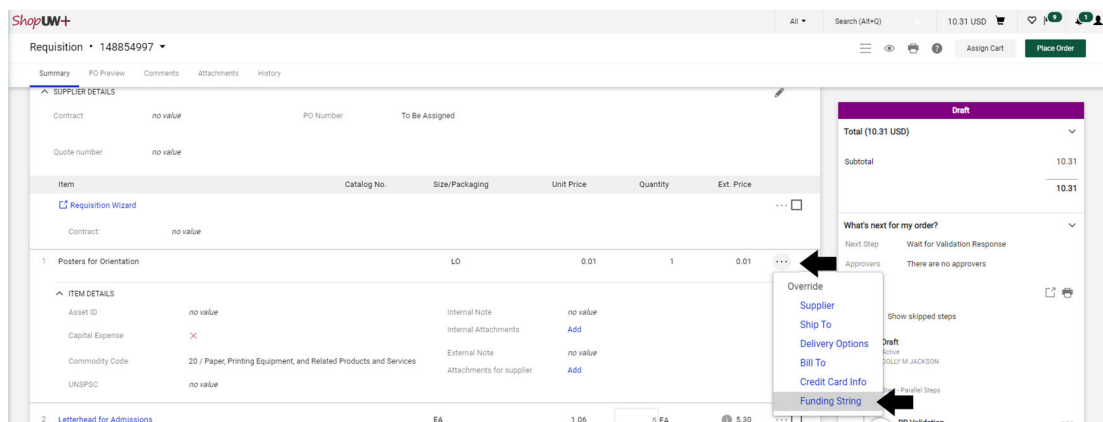
33. Project – Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXXXX_GBY.** You must add the _GBY to the project number. Use the Magnifying Glass to select the project.

34. Class – Only used by Athletics.

35. Click **Save**

36. Scroll down to the item that has a different funding code from the one entered above.

37. Click on the **Three Dots** on the right of the price for that line





38. Click **Funding String** in the Override menu.
39. Click on the Account/Fund/Department/Program or Project to change
40. Change the funding to the new funding string.

A screenshot of a software dialog box titled "Override Line 1: Funding String". The dialog has a dark green header and a light blue body. It contains several input fields with dropdown menus and search icons. The fields are: "GL Business Unit" (value: UWGBY), "Speed Chart" (value: NONE_OBY), "Account" (value: 2620), "Fund" (value: 131), "Department" (value: 400316_OBY), "Program" (value: 1), "PC Business Unit" (value: No Value), "Project" (value: Search), and "Class" (value: Search). There are also plus, checkmark, and heart icons on the right side of the input area. At the bottom right, there are "Save" and "Close" buttons. A legend at the bottom left indicates that an asterisk (*) denotes required fields.

41. Click **Save**.
42. Repeat for any additional item lines that need new funding entered.
43. Click **Place Order**
44. When invoices are received, email the invoice and any backup as a PDFs to Accountspayable@uwgb.edu and include the Requisition number or PO number. **Payments will not be processed if the invoice is not emailed to Accounts Payable.**