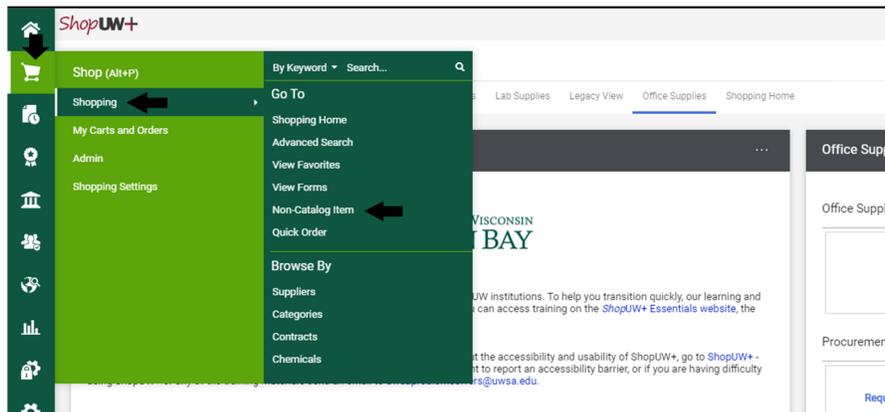


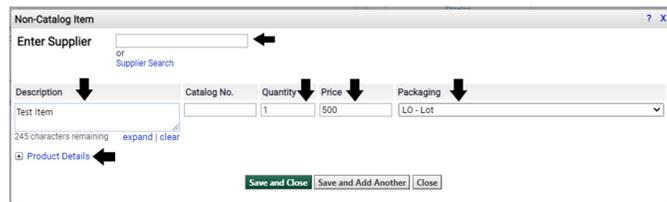
## Chartwells Catering Payment (Non-Catalog Item Add)

To process a Chartwells catering bill, use the Non-Catalog Item Add. If you have more than 5 catering events and know an approximate amount for the year or series of events, use the Standing Order Form.

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

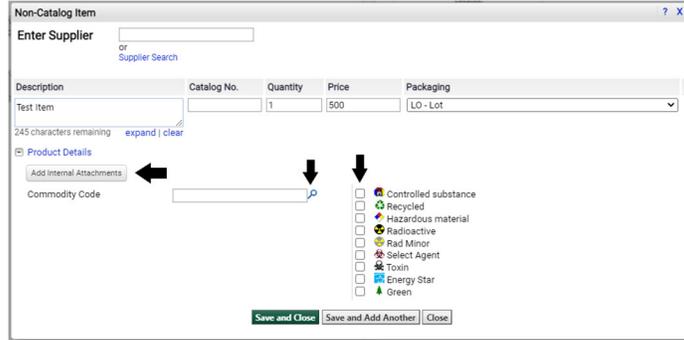


3. Enter **Chartwells** in the Enter Supplier field. **Select Chartwells Dining Services.**

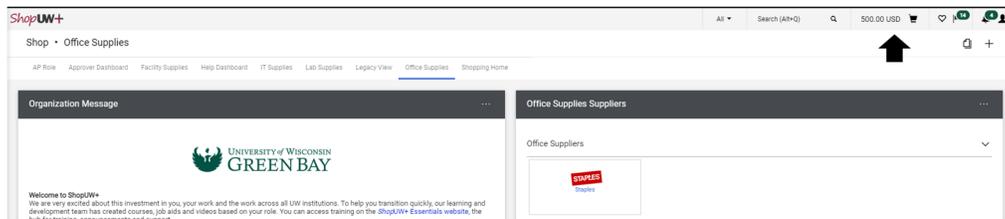


The screenshot shows the 'Non-Catalog Item' form. The 'Enter Supplier' field is highlighted with a black arrow. Below it, there is a table with columns: Description, Catalog No., Quantity, Price, and Packaging. The 'Description' field contains 'Test Item'. The 'Quantity' field contains '1' and the 'Price' field contains '500'. The 'Packaging' dropdown menu is set to 'LO - Lot'. There are buttons for 'Save and Close', 'Save and Add Another', and 'Close' at the bottom.

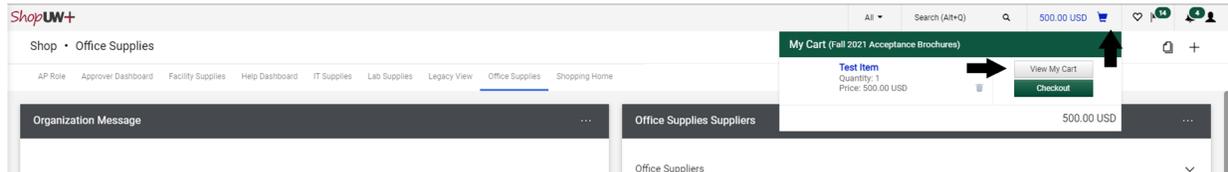
4. Description – First 30 Characters will appear in WISER. Enter a clear description of the event. This will speed the payment process and help answer potential questions Accounts Payable may have.
5. Catalog No. – Leave Blank
6. Quantity – Enter **1**.
7. Unit Price – Enter the price of the invoice.
8. Packaging – Select **Lot**.
9. Click on **Product Details**.
10. Add Internal Attachments – Attach a PDF of the invoice. Click **Next**.



11. Do not check any of the check boxes.
12. Enter **09** in the Commodity Code.
13. If you have additional invoices to add, click **Save and Add Another**. Repeat steps 4-12.
14. Once you have entered all the items, click **Save and Close**.
15. Click on the **Cart Icon** in the top right.

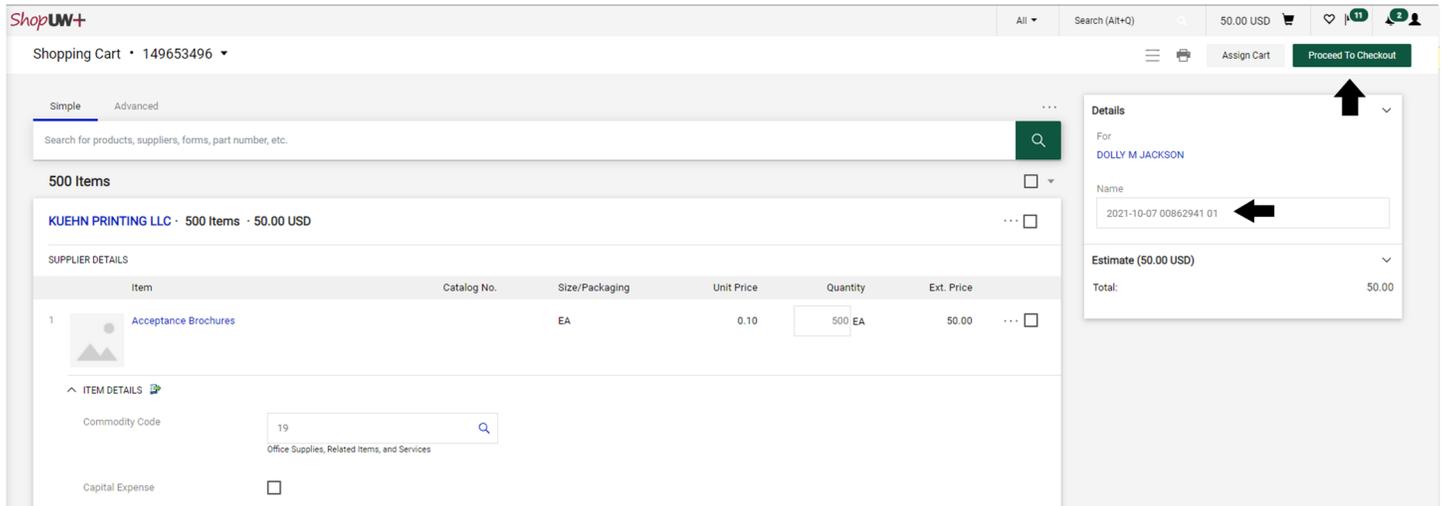


16. Click **View My Cart**.



## Shopping Cart

- 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.



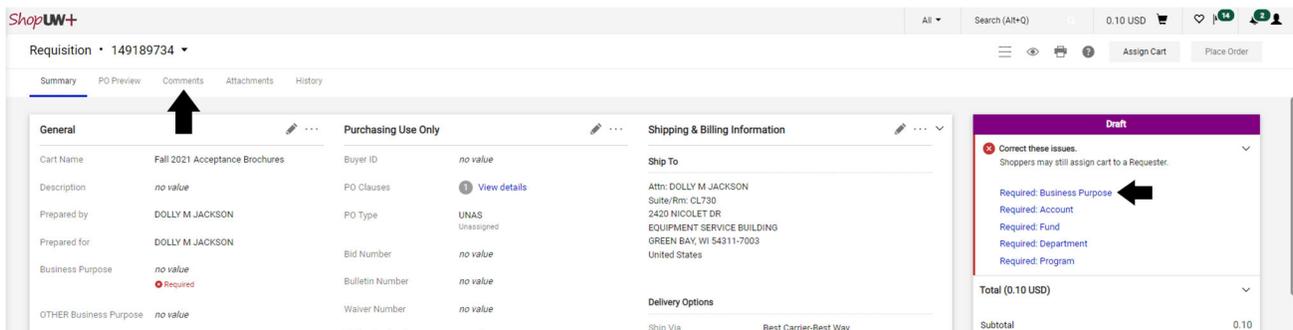
The screenshot shows the ShopUW+ Shopping Cart interface. At the top, there's a search bar and navigation options. The main area displays '500 Items' for 'KUEHN PRINTING LLC' with a total value of 50.00 USD. A table lists the items, including 'Acceptance Brochures' with a quantity of 500 EA and a unit price of 0.10. On the right, a 'Details' sidebar shows the vendor name 'DOLLY M JACKSON' and a 'Name' field containing '2021-10-07 00862941 01'. Below this, an 'Estimate (50.00 USD)' section shows a total of 50.00. A 'Proceed To Checkout' button is visible at the top right.

- 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.

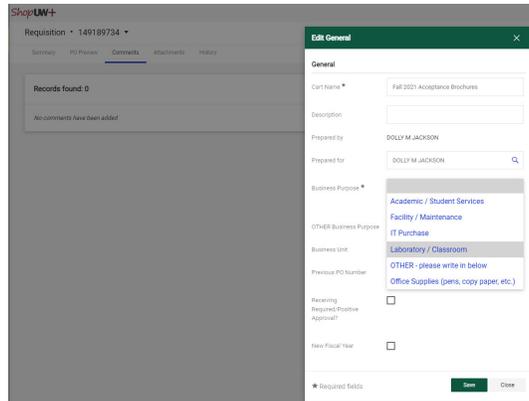
- Click **Comments** tab
- Click the **Plus Sign** to add a comment. Add any notes Purchasing might need. This is optional. If you have several invoices on the same requisition, add a comment stating how many invoices you are paying. Click **Checkmark** to complete the comment.



The screenshot shows the ShopUW+ Requisition interface for requisition 149189734. The 'Comments' tab is selected. The 'General' section shows 'Fall 2021 Acceptance Brochures' as the cart name. The 'Purchasing Use Only' section shows 'UNAS Unassigned' as the PO Type. The 'Shipping & Billing Information' section shows the vendor address: 'Attn: DOLLY M JACKSON, Suite/Rm: CL730, 2420 NICOLET DR, EQUIPMENT SERVICE BUILDING, GREEN BAY, WI 54311-7003, United States'. On the right, a 'Draft' sidebar shows a list of required fields: 'Required: Business Purpose', 'Required: Account', 'Required: Fund', 'Required: Department', and 'Required: Program'. A red error message states: 'Correct these issues. Shoppers may still assign cart to a Requester.' A 'Required: Business Purpose' field is highlighted with a red arrow.

- Click **Required: Business Purpose**

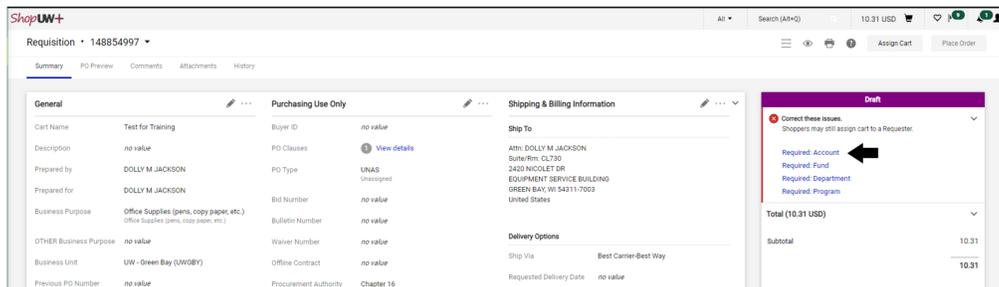
22. Select the appropriate category from the **Drop Down**



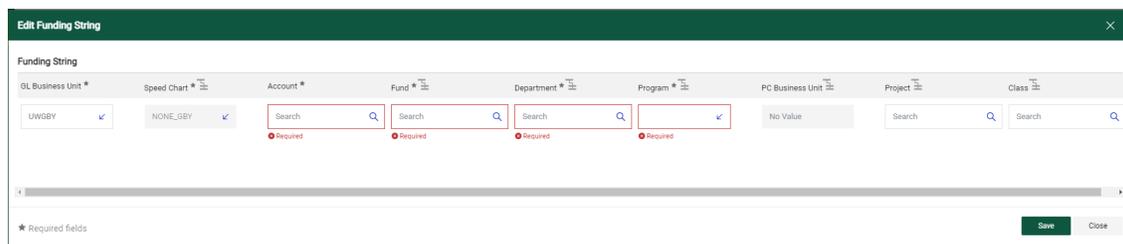
23. Click **Save**.

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

**Single funding code entry**



24. Click **Required: Account**.



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

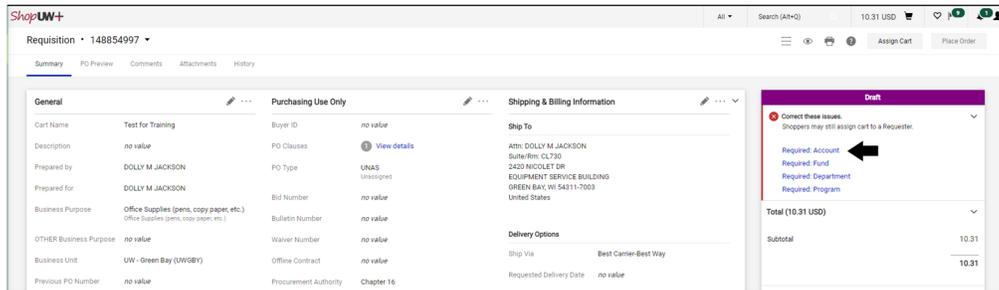
26. Speed Chart – Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.



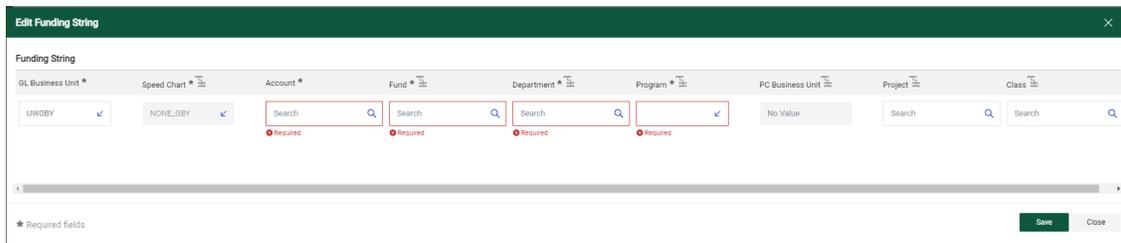
UNIVERSITY of WISCONSIN  
GREEN BAY

27. Account – Enter **3165**.
28. Fund – 3-digit number from your funding string
29. 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.
30. Program – 1-digit number.
31. 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.
32. Class – Only used by Athletics.
33. Click **Save**
34. Click **Place Order**
35. Email the invoice, List of Attendees, Agenda/Flyer, and signed Food Approval as a PDFs to [Accountspayable@uwgb.edu](mailto: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



24. Click **Required: Account**.



25. GL Business Unit – UWGBY

26. Speed Chart – Leave as NONE\_GBY. This auto fills when UWGBY is selected for the GL Unit.

27. Account – Enter **3165**.

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

29. 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.

30. Program – 1-digit number.

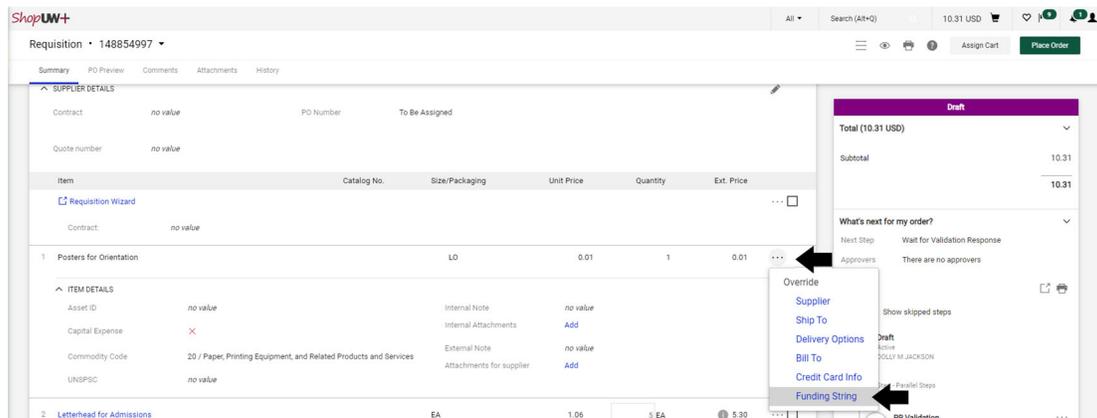
31. Project – Optional. 7-digit alpha numeric. **All project numbers must be in format XXXXXXXX\_GBY.** You must add the \_GBY to the project number. Use the Magnifying Glass to select the project.

32. Class – Only used by Athletics.

33. Click **Save**

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

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





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

A screenshot of a software dialog box titled "Override Line 1: Funding String". The dialog contains several input fields for financial data: "GL Business Unit" (UWGBY), "Speed Chart" (NONE\_OBY), "Account" (2620), "Fund" (131), "Department" (400316\_OBY), "Program" (1), "PC Business Unit" (No Value), "Project" (Search), and "Class" (Search). Each field has a search icon. At the bottom right, there are "Save" and "Close" buttons. A legend at the bottom left indicates that an asterisk (\*) denotes required fields.

- 39. Click **Save**.
- 40. Repeat for any additional item lines that need new funding entered.
- 41. Click **Place Order**
- 42. Email the invoice, List of Attendees, Agenda/Flyer, and signed Food Approval as a PDFs to [Accountspayable@uwgb.edu](mailto: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.**