Creating a Non-Catalog Order for an Exception Item in eProcurement
For this demonstration we will place a Non-Catalog Order for a one-time purchase of bagels and bagel condiments (cream cheese, etc.) for resale at a campus coffee shop.

For this order, we will be using the following information:

- Commodity code: Food distribution services
- Quantity: 1
- Unit of Measure: Each
- Price: $651.40
Before You Begin

☐ Review the Resale Exception Item requirements on the Procurement Services Webpage

☐ Contact the Tax Office to obtain a copy of the UW Reseller Permit

☐ Be prepared to:
  ☐ Check a box to certify that UW Reseller Permit is attached
  ☐ Answer the question of whether or not tax is being collected
    ☐ This information is for data analysis purposes only
The process of creating a Non-Catalog Order is started by selecting **Requisition** from the **Create** drop-down menu. A **Requisition (S)** starts the process of creating a Non-Catalog Order.

1. Click **Create**

2. Select **Requisition**
Click Create Non-Catalog Item
Enter an item description

Full Description: * Resale of Bagels and Associated Bagel Condiments
Select the **Commodity Code**.

The **Account Code** will be set initially based on your choice of **Commodity Code**. Keep the default for now because the system will automatically change this to 05-9800 (RESALE PURCHASES) when you tell the system this is a Resale exception in a later step.
Select the **Supplier**

Full Description: *Resale of Bagels and Associated Bagel Condiments*

Commodity Code: *Food distribution services*

Account Code: 059900 (MISCELLANEOUS)

Supplier: REDDYGOSOLUTIONS [select]

Quantity: 1

Unit of Measure: each

Price: $0.00 USD

Amount: $0.00 USD
Enter the **Supplier Part Number**
Enter the **Quantity**. Select the **Unit of Measure**. Enter the unit **Price**.
Click OK to continue
Enter a meaningful **Title** for the requisition

**Summary**

- **Title:**
- **On Behalf Of:** MELANIE MC KAY FIELDS
- **Delay Purchase Until:**
- **Telephone:** 206-221-6014
- **Template:**
- **Is this item listed on the exception item list?** No

**Definition of Exceptions**

**Funding Sources:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Funding Source Percentage</th>
<th>Funding Source Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>100</td>
<td>$651.40 USD</td>
</tr>
</tbody>
</table>
Enter a meaningful **Title** for the requisition

**Title:** Resale of Bagels and Associated Bagel Condiments

**On Behalf Of:** MELANIE MC KAY FIELDS

**Delay Purchase Until:**

**Telephone:** 206-221-6014

**Template:**

**Is this item listed on the exception item list?**

- [ ] Yes
- [x] No

**Definition of Exceptions**

**Funding Sources:**

<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Other</td>
<td>100</td>
<td>$651.40 USD</td>
</tr>
</tbody>
</table>
The system requires that you answer the question: **Is this item listed on the exception item list?**

Since Resale Items are on the Exception Items list, click **Yes**.
The **Exception Item List** field appears.

Click the drop-down arrow.
**Summary**

**Title:**
Resale of Bagels and Associated Bagel Condiments

**On Behalf Of:**
MELANIE MC KAY FIELD

**Delay Purchase Until:**

**Telephone:**
+1 206 221-6014

**Is this item listed on the exception item list?**
- Yes
- No

**Definition of Exceptions**

- Live Animals, Custom Animal Antibodies, Non-Preserved Animal
- Lab Refrigerators/Lab Freezers
- Radioactive Chemicals/Materials/Equipment

**Funding Sources:**

Select **Search for more...**
<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biological Safety Cabinets</td>
<td>Biological Safety Cabinets</td>
</tr>
<tr>
<td>Blood, Blood Serum and Platelets</td>
<td>Blood, Blood Serum and Platelets</td>
</tr>
<tr>
<td>Cadavers, Organs, and Other Human Tissue</td>
<td>Cadavers, Organs, and Other Human Tissue</td>
</tr>
<tr>
<td>Charters</td>
<td>Charters</td>
</tr>
<tr>
<td>Construction and Building Alteration, Modification, and Repairs</td>
<td>Includes construction and installation, asbestos abatement, flooring, electrical, painting, janitorial, and other services provided by laborers.</td>
</tr>
<tr>
<td>Firearms, ammunition, explosives</td>
<td>Firearms, ammunition, explosives</td>
</tr>
<tr>
<td>Fume Hoods</td>
<td>Fume Hoods</td>
</tr>
<tr>
<td>Lab Refrigerators/Lab Freezers</td>
<td>Lab Refrigerators/Lab Freezers</td>
</tr>
<tr>
<td>Live Animals, Custom Animal Antibodies, Non-Persevered Animal Organs and Tissue</td>
<td>Live Animals, Custom Animal Antibodies, Non-Persevered Animal Organs and Tissue</td>
</tr>
<tr>
<td>Radioactive Chemicals/Materials/Equipment</td>
<td>Radioactive Chemicals/Materials/Equipment</td>
</tr>
</tbody>
</table>

If you don’t see the Exception Item, you can enter part of the name and click **Search**.

The list is in alphabetical order by **Name**.
Choose Value for Exception Item List

Field: Name ▼ Resale

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resale Items</td>
<td>Resale Items</td>
</tr>
</tbody>
</table>

Click **Select**
You are required to check this box to submit the request.

**IMPORTANT:** The State of Washington REQUIRES that you attach a copy of the UW Reseller Permit to the request. *By checking the box, you are certifying that the Reseller Permit is attached.* You can do this in the **Attachments** section below.
The system requires that you select either Yes or No before you can submit your request. The information of whether or not your department is collecting sales tax is for data analysis purposes only.
The eProcurement system assigned the Resale **Account Code** of 05-9800 when you set the Exception Item to **Resale**.

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Add.Info</th>
<th>Budget:Task:Option:Project</th>
<th>Qty</th>
<th>Unit</th>
<th>Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resale of Bagels and Associated Bagel Condiments</td>
<td></td>
<td>143750</td>
<td>1</td>
<td>each</td>
<td>$651.40 USD</td>
<td>$651.40 USD</td>
</tr>
</tbody>
</table>

Supplier: REDDYGOSOLUTIONS  
Contact: REDDYGOSOLUTIONS  
Commodity Code: Food distribution services  
Supplier Part Number: 12345  
Supplier Auxiliary Part ID:  
Manufacturer Part Number:  
Is this M&E item? (Click for Yes): No  
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

Scroll down to add the **UW Reseller Permit** attachment.
SHIPPING - ENTIRE REQUISITION

Ship To: *PURCHASING & ACCOUNT

Deliver To(Room/Name): *Rm216/mfields

COMMENTS - ENTIRE REQUISITION

Comments:

- Visible to Supplier

ATTACHMENTS - ENTIRE REQUISITION

Click Add Attachment
Add Attachment

File: Browse - No file selected.

- Visible to Supplier

OK  Cancel
Navigate to the file

Click Open
Since the supplier is required to keep the reseller permit on file for audit purposes, click **Visible to Supplier** so that the attachment is sent to the supplier with the order.
Add Attachment

File: Browse... SampleResellerPermit.pdf

Visible to Supplier

Click OK
<table>
<thead>
<tr>
<th>File Name</th>
<th>Size</th>
<th>Creator</th>
<th>Date Attached</th>
<th>Visible to Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>SampleResellerPermit.pdf</td>
<td>308.8 KB</td>
<td>MELANIE MC KAY FIELDS</td>
<td>Today, 2:34 PM</td>
<td>✓</td>
</tr>
</tbody>
</table>

- **Verify the Attachment was added**
- **Scroll up to review line item information**
Supplier: REDDYGOSOLUTIONS
Contact: REDDYGOSOLUTIONS
Commodity Code: Food distribution services
Supplier Part Number: 12345
Supplier Auxiliary Part ID:
Manufacturer Part Number:
Is this M&E item? (Click for Yes): No
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

SHIPING - ENTIRE REQUISITION

Ship To: * PURCHASING & ACCOUNT
Deliver To(Room/Name): * Rm216/mfields

COMMENTS - ENTIRE REQUISITION

Comments:

Visible to Supplier

Total Cost: $551.40 USD
Update Total
If everything looks correct, click Submit.
Click View to see the Approval Flow of this request.
Resale items do not require any special approvals. In this example, the only approver is the budget approver. You can click on the box to see who is assigned to this role.
You will receive an email notification when the requisition is approved. The approval node will turn green and display the name of the approver.
For More Information...

• Visit the Non-Catalog Ordering and Exception Item Ordering sections of the Procurement Customer Services Website
  https://f2.washington.edu/fm/ps/how-to-buy/non-catalog
  http://f2.washington.edu/fm/ps/how-to-buy/exception-items

• If you have questions or need assistance, contact Procurement Customer Services by
  • email: pcs_help@uw.edu or
  • Phone: 206-543-4500