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

**Commodity Code:** (no value)

**Account Code:** (none selected)

**Supplier:** (none selected)

**Order Address:** (no selected)

**Supplier Part Number:** (no value)

**Manufacturer Part Number:**
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 (REDDYGOS)

Order Address: REDDYGOSOLUTIONS [ select ]

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: *$0.00 USD

Amount: $0.00 USD

Select the Supplier
Enter the **Supplier Part Number**
Enter the **Quantity**.
Select the **Unit of Measure**.
Enter the unit **Price**.
Click **OK** to continue

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

Commodity Code: *Food distribution services*

Account Code: 059900 (MISCELLANEOUS)

**For Commodity Code Help**

**For Account Codes Code Help**

Supplier: REDDYGOSOLUTIONS (REDDYGOSC)

Order Address: REDDYGOSOLUTIONS [select]

Supplier Part Number: 12345

Manufacturer Part Number: 

Supplier Auxiliary Part ID: 

Quantity: 1

Unit of Measure: each

Price: 651.40 USD

Amount: $0.00 USD

Update Total
Enter a meaningful **Title** for the requisition

**On Behalf Of:**

**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>
<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

Is this item listed on the exception item list? [ ] Yes  [ ] No

**Definition of Exceptions**

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**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.
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**.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
</table>
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.

Scroll down to view line items, shipping information, comments and attachments areas.
The eProcurement system assigned the Resale Account Code of 05-9800 when you set the Exception Item to Resale.

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
### ATTACHMENTS - ENTIRE REQUISITION

<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

TOTAL COST: $551.40 USD
Update Total

SHIPPING - ENTIRE REQUISITION

Ship To: * PURCHASING & ACCOUNT

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

COMMENTS - ENTIRE REQUISITION

Comments:

Visible to Supplier

Scroll up to review header information
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://finance.uw.edu/ps/how-to-buy/aria/non-catalog-purchase-orders

https://finance.uw.edu/ps/how-to-buy/exception-items