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
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**
**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
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
- No

**Definition of Exceptions**

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**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>

---

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.

Click the drop-down arrow
### Summary Approval Flow

<table>
<thead>
<tr>
<th>Title:</th>
<th>Resale of Bagels and Associated Bagel Condiments</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Behalf Of:</td>
<td><strong>MELANIE MC KAY FIELDS</strong></td>
</tr>
<tr>
<td>Delay Purchase Until:</td>
<td></td>
</tr>
<tr>
<td>Telephone:</td>
<td>206-221-8014</td>
</tr>
<tr>
<td>Template:</td>
<td></td>
</tr>
<tr>
<td>Is this item listed on the exception item list?</td>
<td>Yes</td>
</tr>
<tr>
<td>Definition of Exceptions</td>
<td></td>
</tr>
</tbody>
</table>

- XRay/Lasers
- Biological Safety Cabinets
- Cadavers, Organs, and Other Human Tissue
- Automated External Defibrillators (AED)
- Fume Hoods
- Resale Items

### Funding Sources

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
<th>Funding Source Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$651.40 USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Select Search for more...**

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>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>(no value)</td>
<td></td>
</tr>
<tr>
<td>Automated External Defibrillators (AED)</td>
<td>Select</td>
</tr>
<tr>
<td>Biological Safety Cabinets</td>
<td>Select</td>
</tr>
<tr>
<td>Blood, Blood Serum and Platelets</td>
<td>Select</td>
</tr>
<tr>
<td>Cadavers, Organs, and Other Human Tissue</td>
<td>Select</td>
</tr>
<tr>
<td>Charters</td>
<td>Select</td>
</tr>
<tr>
<td>Construction and Building Alteration, Modification, and Repairs</td>
<td>Select</td>
</tr>
<tr>
<td>Firearms, ammunition, explosives</td>
<td>Select</td>
</tr>
<tr>
<td>Fume Hoods</td>
<td>Select</td>
</tr>
<tr>
<td>Lab Refrigerators/Lab Freezers</td>
<td>Select</td>
</tr>
<tr>
<td>Live Animals, Custom Animal Antibodies, Non-Preserved Animal Organs and Tissue</td>
<td>Select</td>
</tr>
<tr>
<td>Radioactive Chemicals/Materials/Equipment</td>
<td>Select</td>
</tr>
</tbody>
</table>

[17]

[18]
Choose Value for Exception Item List

Field: Name ▼ Resale

Name ▲ Description

Resale Items       Resale Items

Click Select

Summary

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?

Definition of Exceptions

Resale Items require a resale certificate that can be obtained from the tax office.

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.
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

OK Cancel

Verify the Attachment was added

Scroll up to review line item information
Supplier: REDGYOSOLUTIONS
Contact: REDGYOSOLUTIONS
Commodity Code: Food distribution services
Supplier Part Number: 12345
Supplier Auxiliary Part ID:
Manufacturer Part Number:
Is this a MIE item? (Click for Yes): No
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

Total Cost: $651.49 USD
Update Total

SHIPPING - ENTIRE REQUISITION

Ship To: *PURCHASING & ACCOUNT*
Deliver To (Room/Name): *Room 216/Fields*

COMMENTS - ENTIRE REQUISITION

Comments: [Blank]

If everything looks correct, click Submit.

ARIBA SPEND MANAGEMENT

Title:
On Behalf Of: MELANIE MC KAY FIELDS
Delay Purchase Until: 0
Telephone: 206-221-6814
Template:
Is this item listed on the exception item list?

Definition of Exceptions
Resale Items
Resale items require a resale certificate that can be obtained from the tax office.
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.
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@uw.edu or
  • Phone: 206-543-4500