

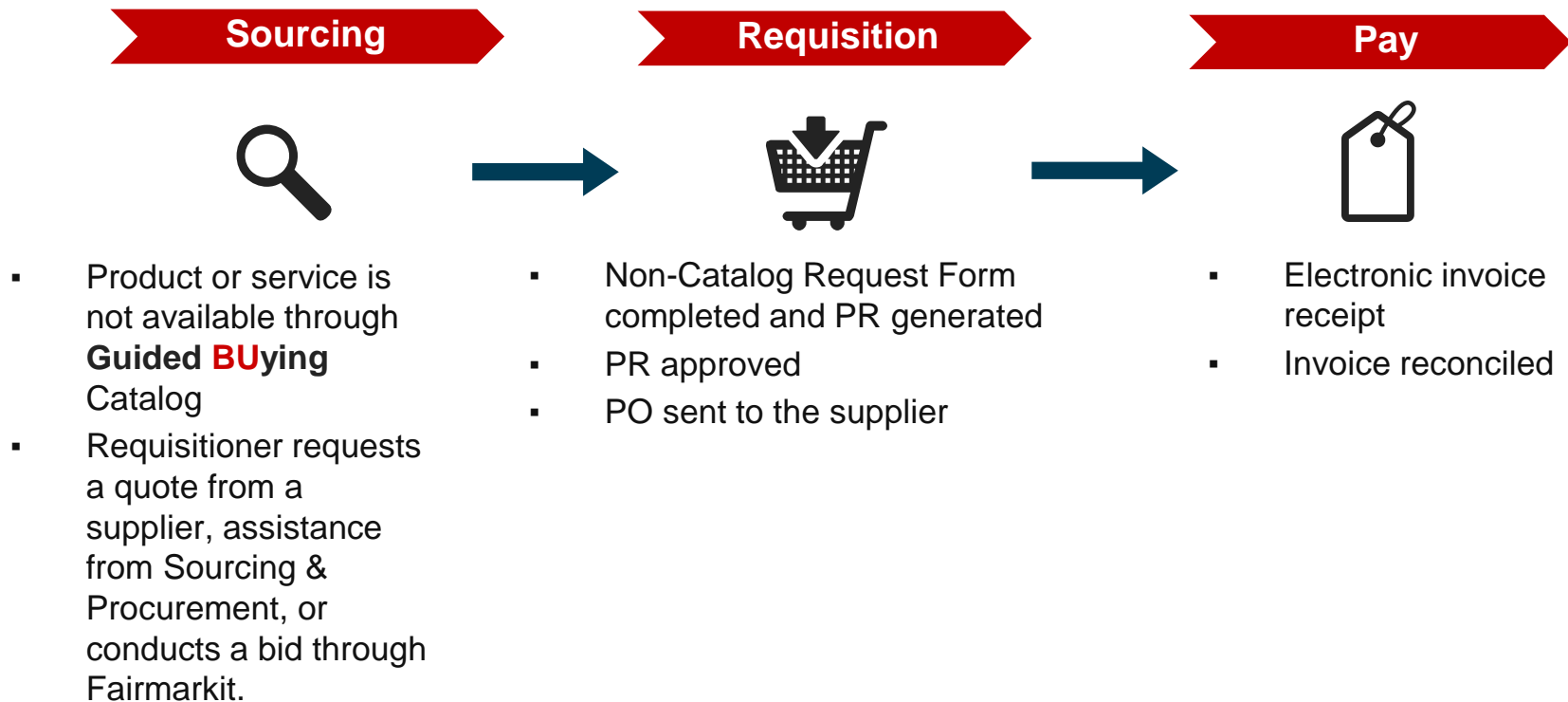
# Purchase Requisition Generation: Non-Catalog Request



## Purchase Requisition Generation: Non-Catalog Request

Non-Catalog requests are used to create PRs for one-off purchases for services or products that are not in a supplier catalog in **Guided BUYing**. Requisitioners must obtain a quote from a supplier to attach to their PR.

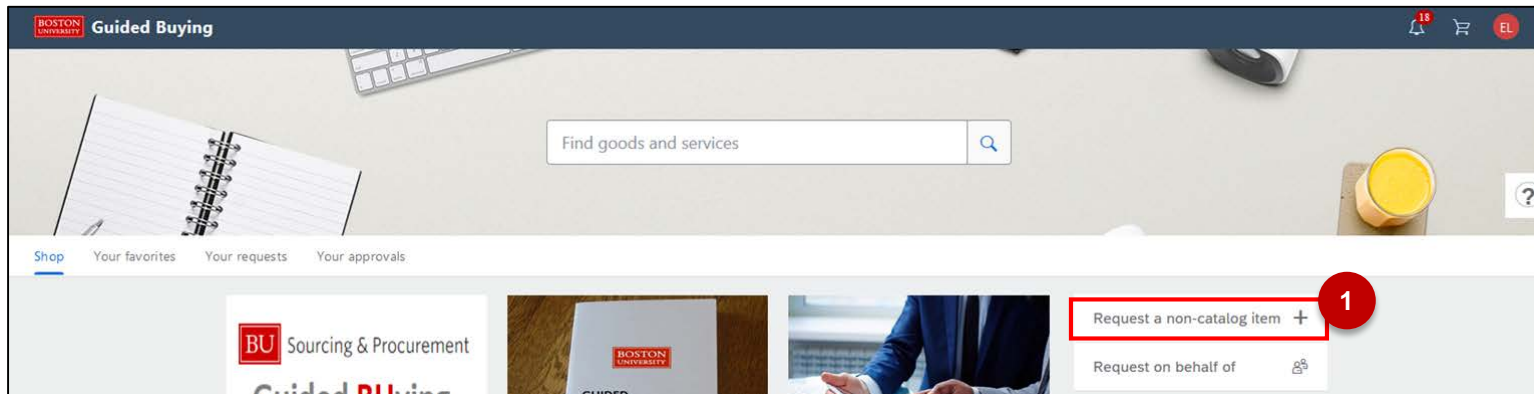
### Process Flow



# Purchase Requisition Generation: Non-Catalog Request

Create a Non-Catalog Request to purchase a product or service not available through a **Guided BUYing** catalog. The Request Non-Catalog Item form is available on the **Guided BUYing** homepage and within each category tile.

- 1 Click **Request non-catalog item** on the **Guided BUYing** homepage. Alternatively, navigate to the appropriate category tile and select the non-catalog request (**Note:** Category will populate based on the category tile).

The image shows the "Non-catalog request" form. At the top, there's a back arrow and the text "Non-catalog request". On the right, there are two buttons: "Add to cart" and "Cancel". The form has several fields: "Product name" with an asterisk, "Category" with an asterisk and a dropdown menu labeled "Choose a category", "Description" with an asterisk and a large text area, "Quantity" with an asterisk and a numeric input field with minus and plus buttons, "Unit of measure" with an asterisk and a dropdown menu labeled "LG", "Unit price" with an asterisk and a numeric input field, and "Supplier" with a text area labeled "Select a category to view company recommended suppliers" and a button labeled "View all suppliers".

# Purchase Requisition Generation: Non-Catalog Request

Complete the Non-Catalog Request Form based on a quote or other documentation received from a supplier. Required fields are indicated with a red asterisk.

The screenshot shows the 'Non-catalog request' form. Callout 2 points to the 'Product name' field, which contains 'Relocating Office'. Callout 3 points to the 'Category' dropdown menu, which is open and shows a list of categories. Callout 4 points to the 'Browse all' link at the bottom of the category list.

Non-catalog request

Product name \*  
Relocating Office

Description \*

Quantity \* Unit of measure \* Unit price \*  
EA USD

Supplier  
Select a category to view company recommended suppliers

Category \*  
Choose a category  
Clear selection  
SUPPLIES-OFFICE  
SERVICES-CONSULTING  
SERVICES-LABORATORY  
COMPUTER-SERVICES  
SERVICES-MOVING  
FURNITURE-CARPET-DRPS  
SUPPLIES-APPLIANCES  
SUPPLIES-ANIMALS  
SERVICES-ADVERTISING  
CAPITAL-LABORATORY  
Browse all

The screenshot shows the 'Choose a category' dialog box. Callout 4 points to the search input field, which contains 'moving'. Callout 5 points to the 'Choose' button next to the selected category 'SERVICES-MOVING - 78101804'.

Choose a category

moving

General Goods & Services

- SERVICES-MOVING - 78101804

Choose

- 2 Enter the **Product name**.
- 3 Select the drop down under **Category** and click **Browse all**.
- 4 Search for the most accurate category.
- 5 Click the arrow next to the category to see detail. Click **Choose** to assign the category.

# Purchase Requisition Generation: Non-Catalog Request

Provide a detailed description of the item or service. If available, recommended suppliers will populate based on the selected category. A supplier must be assigned to submit to the PR.\*

Product name \*  
Relocating Office

Category \*  
SERVICES-MOVING

Description \*  
We are looking to hire ABC Moving to help us relocate a faculty member's office to another building. We will engage the supplier April 7 – June 18.

Quantity \*  
20

Unit of measure \*  
hour

Unit price \*  
250

USD

Supplier

Recommended suppliers for you

E.A. Spry Co. Inc.  
ID 0010000798  
Woburn, MA

ABC Moving Services, Inc.  
ID 0010005020  
Somerville, MA

Spike Inc  
ID 0010006971  
Watertown, MA

View all suppliers

Choose a supplier

Search for supplier

Supplier ID	Name	Address	City	State	Country	
0010000005	Mahoneys Growing Co LLC	449 Western Ave	brighton	MA	US	Choose
0010000036	Ace Surgical Supply Company, Inc	1034 Pearl Street	Brockton	MA	US	Choose
0010000041	Dry Ice Corp.	300 Hingham Street	Rockland	MA	US	Choose

6 Provide a detailed description of the product or service.

7 Enter **Quantity**, **Unit of measure**, and **Unit price**.

8 Select a **recommended supplier** if applicable or click **View all suppliers**.

**Note:** PRs cannot be submitted without a supplier assigned.

9 After you click **View all suppliers**, search and click **Choose** next to the appropriate supplier.

**\*Note:** If you cannot find the supplier you are looking for, you may be searching under the “Doing Business As” (DBA) name which are not visible in **Guided Buying**. **Guided Buying** only makes visible the parent company name. If you know the parent company name, search by that. If not, view the supplier list [here](#), updated weekly, which lists both the parent company name as well as the DBA for all registered suppliers. If you still cannot find the supplier, submit the Supplier Request Form found on the homepage of **Guided Buying**. The Supplier Request Form must be submitted before engaging the supplier and before submitting a PR.

# Purchase Requisition Generation: Non-Catalog Request

Complete the Non-Catalog Request and proceed to checkout. Information from the form will populate into the PR.

The screenshot shows the 'Non-catalog request' form. At the top right, there is a red circle with the number '10' pointing to a red-bordered 'Add to cart' button. Below the form, a red circle with the number '11' points to a 'Check out' button in a cart summary pop-up. The form itself contains the following fields:

- Product name \***: Relocating Office
- Category \***: SERVICES-MOVING
- Description \***: We are looking to hire ABC Moving to help us relocate a faculty member's office to another building. We will engage the supplier April 7 – June 18.
- Quantity \***: 20
- Unit of measure \***: hour
- Unit price \***: 250
- Currency**: USD
- Supplier**: Chosen supplier: ABC Moving Services, Inc. (Somerville, MA, Vendor ID 0010005020). Contact information: Christine Perry, christine.perry@abcmoving.biz.

A warning message at the top left states: 'NonCatalogOrders: If this order is for services, or if you are expecting multiple invoices, please choose "Amount Based" in the field "Order Type". For materials or goods, please choose "Standard".'

View selected supplier.

10 Once complete, Click **Add to cart**.


A warning will display reminding Requisitioners if this order is for services, or you are expecting multiple invoices, please choose "Amount Based" in the field "Order Type". For materials or goods, please choose "Standard".

11 Click **Check out** on the prompt. Information entered in form will flow to PR.


# Purchase Requisition Generation: Non-Catalog Request

The process to check out is the same for all PRs, but there are a few additional fields to complete for Non-Catalog Requests.

Items (1)

 This item contains missing or incorrect information.

12

	<b>Relocating Office</b> 0010005020 (ABC Moving Services, Inc.)	Quantity - 20 +	Price 250 USD	Net Amount \$5,000.00 USD
		Unit of Measure Hour		Gross Amount ⓘ \$5,000.00 USD
<div>Copy Delete</div>				
Name Relocating Office		Supplier 0010005020 (ABC Moving Services, Inc.)		
Description We are looking to hire ABC Moving to help us relocate a faculty member's office to another building. We will engage the		Supplier Location ⓘ ABC Moving Services, Inc. 33 Inner Belt Road Somerville, MA 02143 United States		
Quote Validity Date Not specified		Supplier Part Number		
Supplier Auxiliary Part ID				
<div>&gt; Accounting Cost Center (1471780000 (RADIO BOSTON))</div> <div>&gt; Shipping 975 Commonwealth Avenue, Boston</div> <div>&gt; Comments</div> <div>&gt; Attachments</div> <div>&gt; Others</div> <div>Commodity Code ⓘ SERVICES-MOVING</div> <div>Material Group 78101804 (Relocation Services)</div>				

**Special Instructions:**  
Review header information and address required fields.


12 Expand the line level detail and view information from the Non-Catalog Request form.


If available enter a **Supplier Part Number**.\*

**Helpful Hint:**  
Click the three dots on the right of the line item to copy or delete the line.

# Purchase Requisition Generation: Non-Catalog Request

Update details at the line level and add any necessary attachments.

 This item contains missing or incorrect information.



Relocating Office

0010005020 (ABC Moving Services, Inc.)

Quantity

-

20

+

Price

250


USD

Net Amount

\$5,000.00 USD

Unit of Measure

Hour

Gross Amount 

\$5,000.00 USD

Name

Relocating Office

Supplier

0010005020 (ABC Moving Services, Inc.)

Description

We are looking to hire ABC Moving to help us relocate a faculty member's office to another building. We will engage the

Supplier Location 

ABC Moving Services, Inc.

Supplier Part Number

Supplier Auxiliary Part ID

> Accounting

Cost Center (1471780000 (RADIO BOSTON))

> Shipping

975 Commonwealth Avenue, Boston

> Comments

> Attachments

 Drag and drop file here, or [browse](#) to upload

☐ Share with supplier

Add

EL

Erika Lonardo

2/1/21

Shared with supplier



ABC Relocation ...

179 KB

## Special Instructions:

**13** Update Accounting, Shipping, and add Comments.

Attachments such as quotes must be included. Check **Share with Supplier** if applicable.



## Purchase Requisition Generation: Non-Catalog Request

Further information for the line item can be found in the other drop down. For Non-Catalog PRs, the **Order Type** field must be updated to Standard or Amount Based. Add any header level Attachments or Comments before submitting the PR.

> Accounting Cost Center (1471780000 (RADIO BOSTON))

> Shipping 975 Commonwealth Avenue, Boston

> Comments

> Attachments

▼ Others

Commodity Code ⓘ  
SERVICES-MOVING ▼

Material Group  
78101804 (Relocation Services)

Item Category \* ⓘ  
Material ▼

Payment Terms  
Z060 - Net 60 days

Incoterms Code  
(no value)

Incoterms Location  
Not specified

Purch Org  
1000 (Sourcing & Procurement) ▼

Line Item Text ⓘ

Contract ⓘ  
(no value) ▼

Order Type \*  
▼

⚠ Order Type must be set.

Clear selection

Standard

Amount Based

### Special Instructions:

- 14 **Order Type:** Non-Catalog PRs must be designated as Standard or Amount Based by updating the **Order Type** field. Select **Amount Based** for services or if you are expecting multiple invoices, and **Standard** for materials.

Once ready, click **Submit** to submit the PR.

## Purchase Requisition Generation: Non-Catalog Request

Once submitted, you will receive a confirmation on the screen and via email. Next, the first approver in the workflow will receive the PR.

**15** View confirmation. Click **Done** or **View Requisition**.

**16** You will receive an email notification when the PR is approved.

Alternatively, navigate to the **Your Requests** tab on the homepage of **Guided BUYing** to view previously placed PRs and their statuses.

Submitted

Approval Flow Click on the line to add approvers

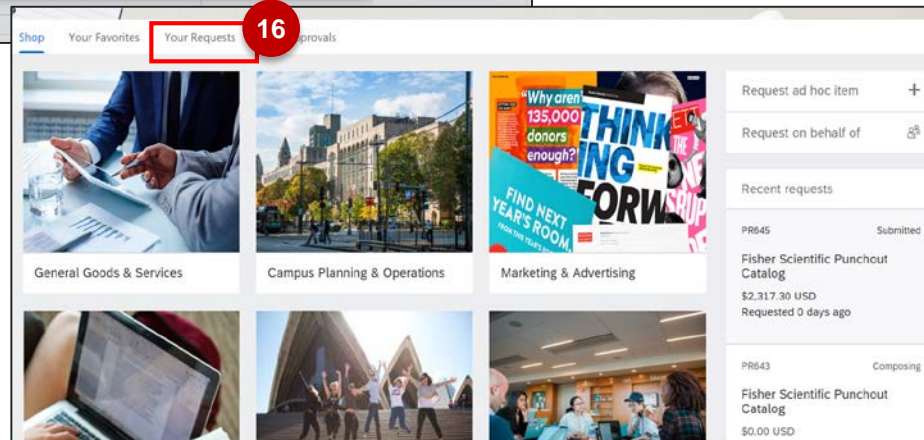
Request BUWTR Success X

Your requisition has been sent for approval.

Comments

Write your comment...

Done View requisition Add



### Next Steps:

- You will receive an email notification if the PR is approved. Once a PR is approved, it automatically generates a PO.
- If the PR is not approved, the Requisitioner will need to modify and re-submit.
- Navigate to the **Your Requests** tab on the homepage of **Guided BUYing** to view previously placed PRs and their statuses.