

Confirming Non-Catalog Purchase Order

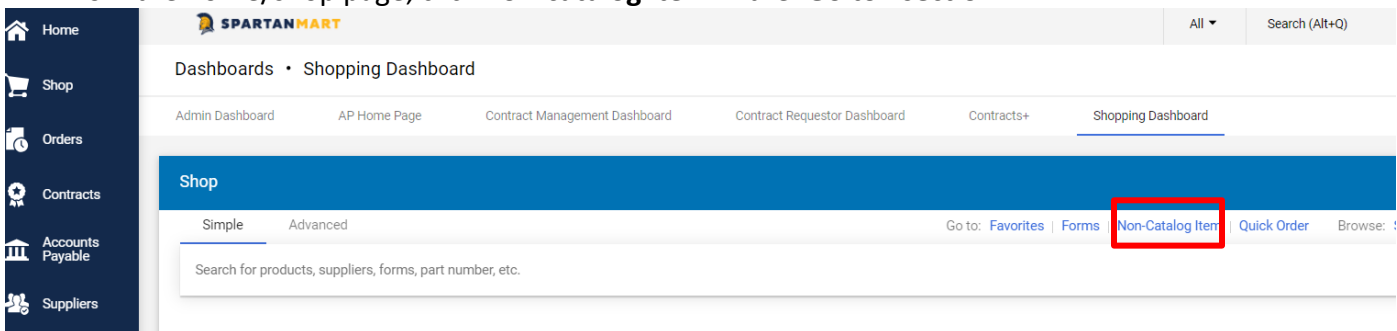
Definition of a Confirming Order: A confirming order is a purchase, letter of intent to purchase, or request for scheduling in advance of an order that is made by an individual, without having a valid purchase order number, p-card or approved payment request form.

***An example of a confirming purchase order can be defined as a purchase with a vendor (i.e. the goods and/or service was received, became legally binding) prior to the conversion of a requisition to a purchase order and the requisite compliance checks that must accompany each such conversion.*

Confirming Non-catalog orders allow users to pay for items already ordered from an approved vendor that are not available via hosted or punch-out suppliers. If you want to purchase an item from a hosted supplier but the specific item is not in the hosted catalog, you can use the non-catalog order form for the hosted supplier.

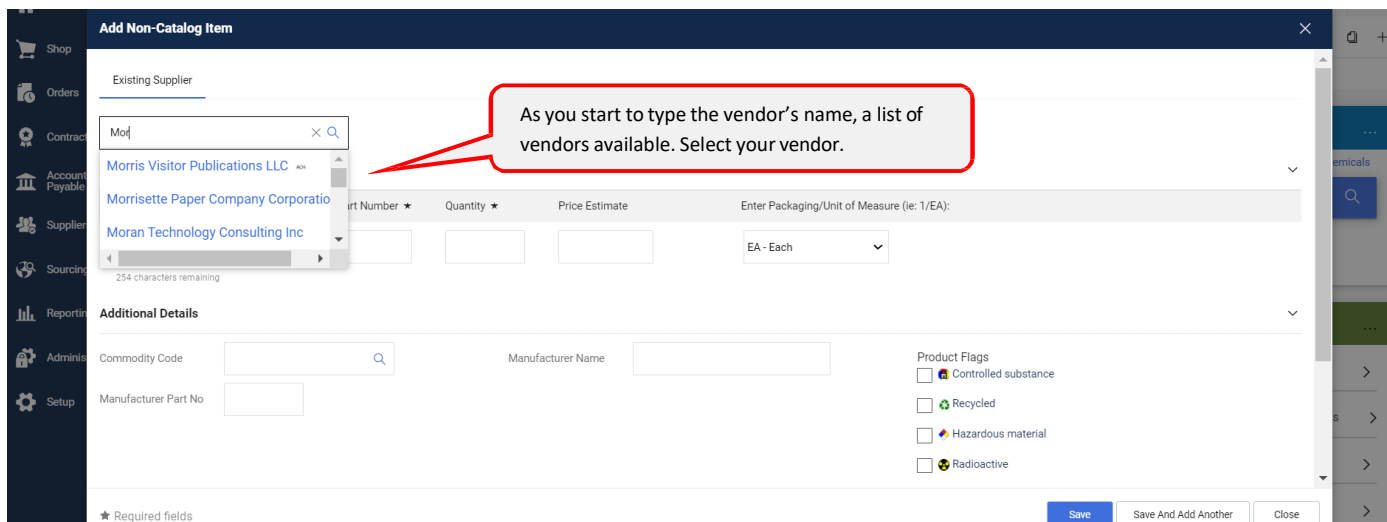
Note: Make sure to have the vendor name, product information, and unit pricing prior to selecting the non-catalog order form.

1. From the home/shop page, click **non-catalog item** in the 'Go to:' section.



2. Enter the supplier name in the **Enter Supplier** textbox. Notice as you type the name that a list of available suppliers is available for you to select from. Select the supplier from the list.

*Note: If the supplier you want to use is not available, you must enter it as a new supplier (See **New Vendor**



Ordering

3. Enter the product information for the item you want to purchase in the **Product Description** textbox, enter the catalog number in the **Catalog No.** textbox, enter the number of items you want to purchase in the **Quantity** textbox, enter the price in the **Price Estimate** textbox and select the unit of measure (UOM) in the **Packaging** textbox (the default UOM is EA-Each). These fields are all required.

The screenshot shows the 'Add Non-Catalog Item' form. The 'Existing Supplier' field is filled with 'Morrisette Paper Company Corporation'. The 'Fulfillment Address' is 'VN Purchasing Vendor 1 - PO Box 20768, Greensboro, North Carolina 27420 United States'. The 'Distribution Methods' field is 'ACH'. The 'Item' section shows a table with the following data:

Product Description *	Item/Part Number *	Quantity *	Price Estimate	Enter Packaging/Unit of Measure (: 1/EA):
Creme Cleanser 20oz Bottle 12/Cs	123456	10	39.99	CS - Case

The 'Additional Details' section shows the 'Commodity Code' field with the value '47130000' and a magnifying glass icon. The 'Manufacturer Name' field is empty. The 'Product Flags' section has two checkboxes: 'Controlled substance' (unchecked) and 'Recycled' (unchecked). At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close'.

4. Enter the commodity code in the **Commodity Code** textbox. Since this is a non-catalog order, you will need to search for the commodity code.

- Click the magnifying glass next to the Commodity Code textbox.

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Product Description *	Item/Part Number *	Quantity *	Price Estimate
Creme Cleanser 20oz Bottle 12/Cs	123456	10	39.99

The 'Additional Details' section shows the 'Commodity Code' field with a magnifying glass icon. A red callout box points to the magnifying glass icon with the text: 'Click the magnifying glass to search for the commodity'. The 'Manufacturer Name' field is empty. The 'Product Flags' section has two checkboxes: 'Controlled substance' (unchecked) and 'Recycled' (unchecked). At the bottom, there are buttons for 'Save', 'Save And Add Another', and 'Close'.

- Enter the item in **Description contains...** textbox and click **Search**. (For help with Commodity Codes, see **Commodity Code Searches** instructions.)

Commodity Code Search ✕

Code starts with...

janitorial

Filter

Clear All Filters

< > Page 1 of 200
1-20 of 4000 Results
20 Per Page ▾

Code ↑	Description	
00000000	Spot Buy Products	+
10000000	Live Plant and Animal Material and Accessories and Supplies	+

- You are returned a list of codes from which to select.

Commodity Code Search ✕

Code starts with...

cleaning supplies

Filter

Clear All Filters

Code ↑	Description	
44103107	Printer or facsimile or photocopier cleaning supplies	+

Close

- You can then refine your search as needed. Enter a more specific description to narrow your search, or a less specific description to yield more results, and click filter.

Commodity Code Search

Make your search more or less specific, as needed.

Code starts with... janitorial Filter Clear All Filters

Then click Filter.

Code ↑	Description	
47120000	Janitorial equipment	+
47130000	Cleaning and janitorial supplies	+
76110000	Cleaning and janitorial services	+

Close

- Select the code that best fits the item you are purchasing.

Commodity Code Search

Code starts with... janitorial Filter Clear All Filters

Click + to select the commodity code

Code ↑	Description	
47120000	Janitorial equipment	+
47130000	Cleaning and janitorial supplies	+
76110000	Cleaning and janitorial services	+

5. Click **Save and Add Another** if you have other items to order, or **Save** if you have all the items you need.

Add Non-Catalog Item

Existing Supplier

Morrisette Paper Company Corporation Morrisette Paper Company Corporation ACH

Fulfillment Address **Distribution Methods**

VN Purchasing Vendor 1 - PO Box 20768, Greensboro, North Carolina 27420 United States

Item 7 items have been found containing '123456' in their Catalog No. [View all in search results](#)

Product Description *	Item/Part Number *	Quantity *	Price Estimate	Enter Packaging/Unit of Measure (ie: 1/EA):
Creme Cleanser 20oz Bottle 12/Cs	123456	10	39.99	CS - Case

221 characters remaining

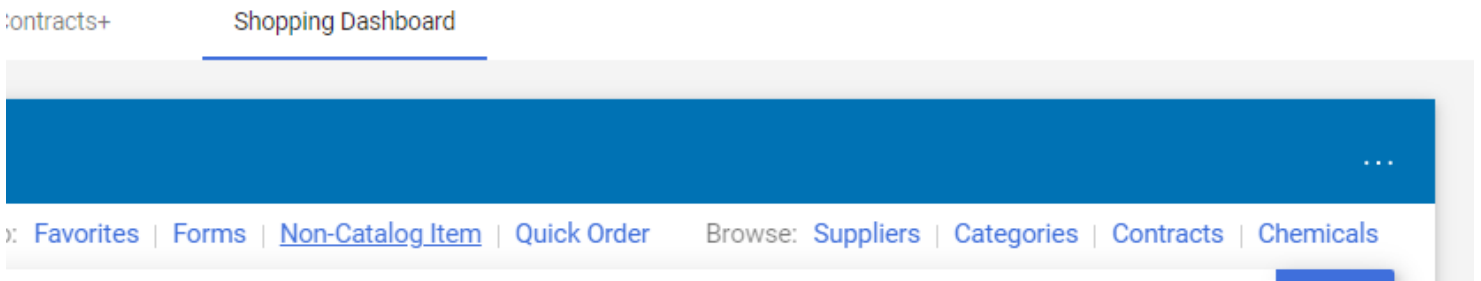
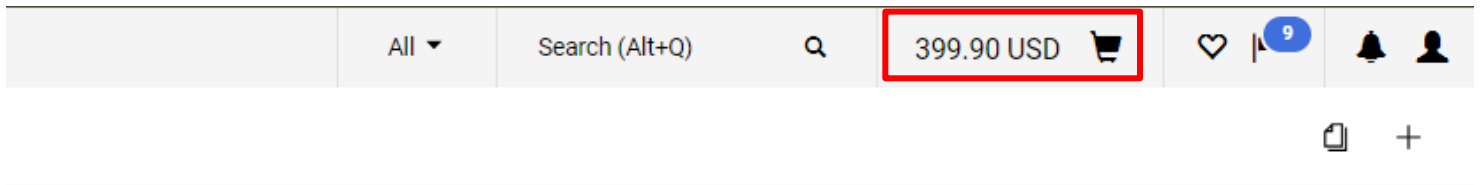
Additional Details

Commodity Code 47130000 Manufacturer Name Product Flags Controlled substance Recycled

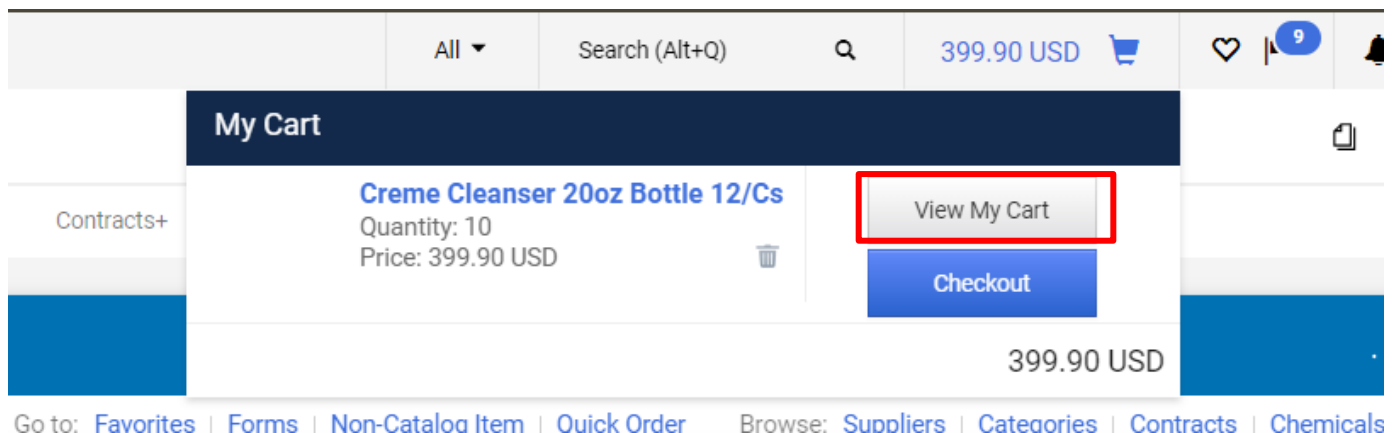
Manufacturer Part No

★ Required fields

6. Go to your cart by **clicking the cart** in the upper right hand corner of SpartanMart.



7. Click **View Cart**



8. You are taken to the active cart with your selected items. Name your Cart if you wish, Click Proceed to Checkout.

Shopping Cart • Shopping Cart

Assign Cart **Proceed To Checkout**

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Cart Name 2023-10-25 AWBIRCHE 01

Description

Priority Normal

Freight/Handling Pre-approved?

Bankwire

Summary

Details

For Allysa Robinson

Total (399.90 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal *	399.90
Shipping	0.00
Handling	0.00
Total *	399.90

10 Items


Morrisette Paper Company Corporation • 10 Items • 399.90 USD

9. Select the edit pencil in the General Section.

SPARTANMART

Requisition • 181695072

Summary Taxes/S&H PO Preview Comments Attachments History

General 

Cart Name	2024-01-19 AWBIRCHE 01
Description	no value
Priority	Normal
Prepared by	Allysa Robinson
Prepared for	Allysa Robinson
Standing PO	✗
Confirming Order	✗
Order Type	no value
Withholding	no value
Vendor Type	no value
Bankwire	✗
PO Clauses	2 Edit View details

Shipping

Ship To

Contact Name Allysa Robinson, Rm 203G
Phone +1 336-334-5997
Email awbirche@uncg.edu
UNCG-Procurement Services
840 Neal St
Greensboro, NC 27403
United States

Shipping address code PURC99

Delivery Options

Expedite ✗

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Freight/Handling Pre-approved? no value

Purchasing Dept Buyer Information

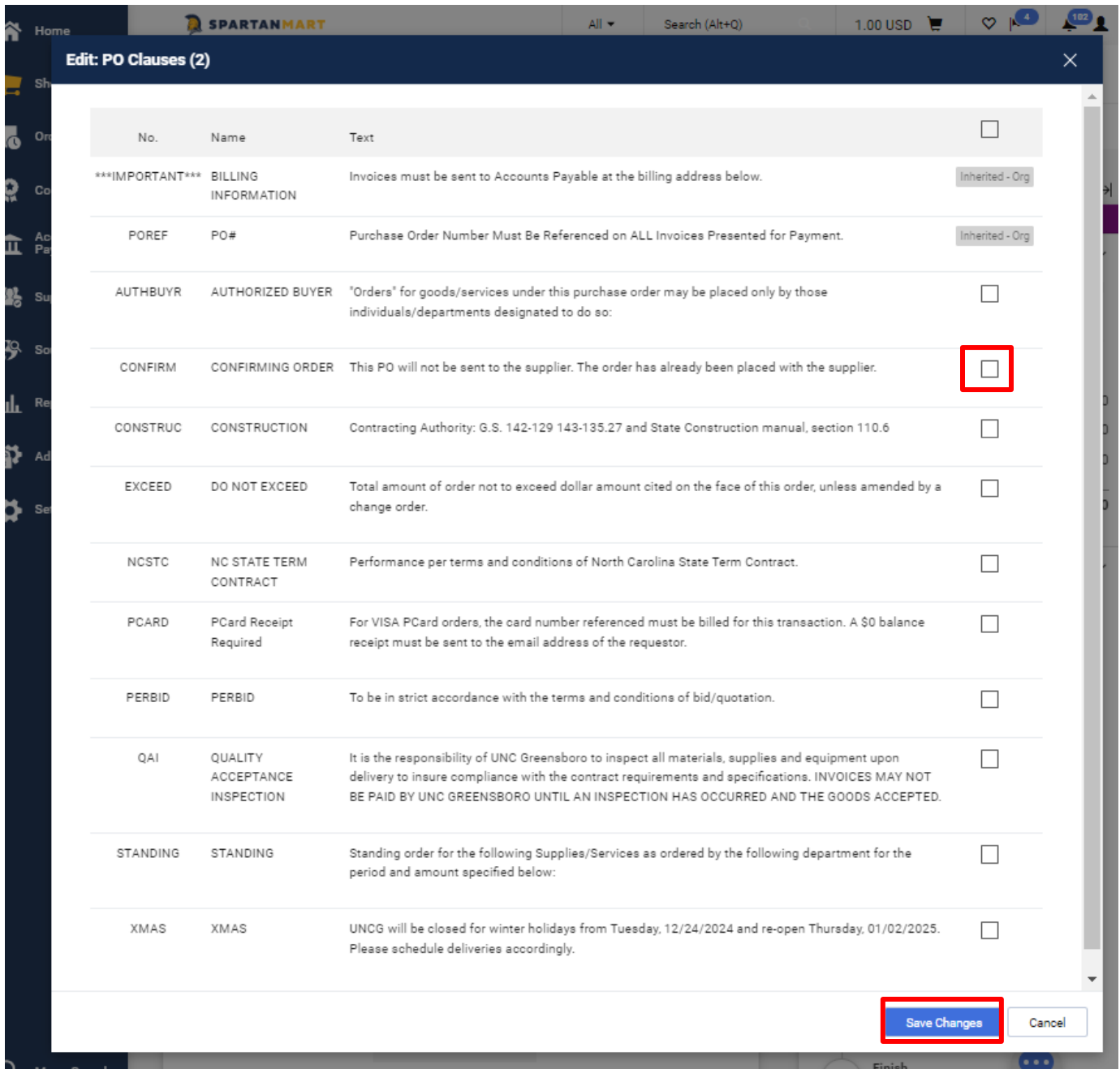
10. Check the Confirming Order check box, then Click save.

The screenshot shows the 'Edit General' window for a purchase order. The 'Confirming Order' checkbox is checked and highlighted with a red box. The 'Save' button is also highlighted with a red box. Other fields include 'Cart Name' (2024-01-19 AWBIRCHE 01), 'Priority' (Normal), 'Prepared by' (Allysa Robinson), and 'PO Clauses' (2).

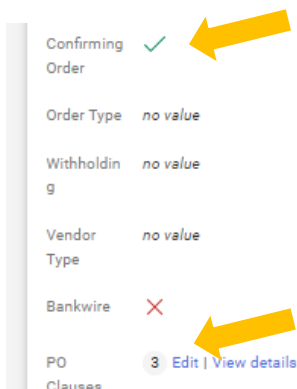
11. Look to make sure a green check mark appears next to the confirming order box. Click Edit button next to PO Clauses.

The screenshot shows the 'General' section of the purchase order details. The 'Confirming Order' field has a green check mark next to it, and a yellow arrow points to it. The 'PO Clauses' field is highlighted with a red box and contains the text '2 Edit | view details'. Other fields include 'Cart Name' (2024-01-19 AWBIRCHE 01), 'Priority' (Normal), 'Prepared by' (Allysa Robinson), and 'Bankwire' (no value).

12. Click check box with the PO clause named CONFIRM / CONFIRMING ORDER, then Click Save Changes.



13. This PO clause will make sure that the PO does not get sent to the vendor since the order has already been placed with the vendor (by email, by phone, in person, etc.) Verify that Confirming is checked and PO Clause number has increased by 1 clause.



14. **All confirming orders** must have an invoice attached in the Internal Notes and Attachment section. **Please click the Add button to attach the invoice.**

****Note you will still be responsible for emailing this to accounts payable and requesting that this invoice be paid. I would suggest that you wait to email accounts payable until you receive your PO #. Then write the PO # on the invoice before emailing it to request payment. Invoice will not be payable until you create a receipt on the PO. (See how to guides to create a receipt).**

The screenshot shows the SpartanMart requisition page for requisition 181695072. The page is divided into several sections: Summary, Taxes/S&H, PO Preview, Comments, Attachments, and History. The Summary section is currently active, showing a table with columns for Buyer, Phone, and Email, all of which are currently empty. Below this is the Accounting Codes section, which includes a table with columns for Chart, Index, Account, and Activity. The Internal Notes and Attachments section is also visible, with a red box highlighting the 'Add' button. The External Notes and Attachments section is also present. On the right side of the page, there is a Summary section with a 'Draft' status and a total of 1.00 USD. The Summary section includes a table with columns for Subtotal, Shipping, and Handling, all of which are currently empty.

15. Click Save changes after you drop or browse to add your file.

The screenshot shows the 'Add Attachments' dialog box. The dialog box has a title bar with 'Add Attachments' and a close button. Below the title bar, there are two radio buttons for 'Attachment Type': 'File' (selected) and 'Link'. Below this is a section for 'File(s)' with a star icon and a dashed box for dropping a file. The text inside the dashed box says 'Drop File or Browse' and 'Max. File Size: 24.41 MB'. At the bottom of the dialog box, there are two buttons: 'Save Changes' (highlighted with a red box) and 'Close'. There is also a 'Required fields' label with a star icon.

16. Process your PO as you normally would from this step. If you do not have default account codes you may need to enter them now. Then you can Assign the cart or click place order depending on your user role permissions.

The screenshot shows the bottom of the requisition page. There are two buttons: 'Assign Cart' and 'Place Order'. Both buttons are highlighted with a red box.