

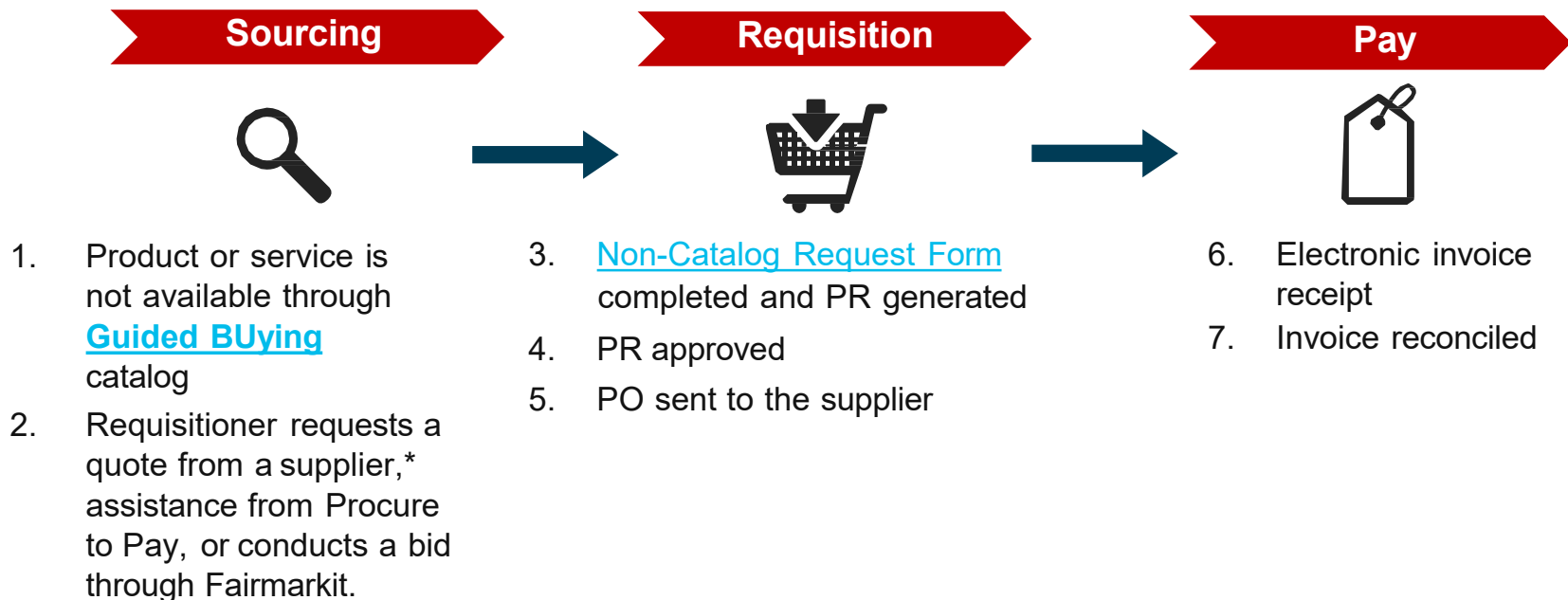
# Purchase Requisition (PR) Generation: Non-Catalog Request



## PR Generation: Non-catalog request – Process Flow

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



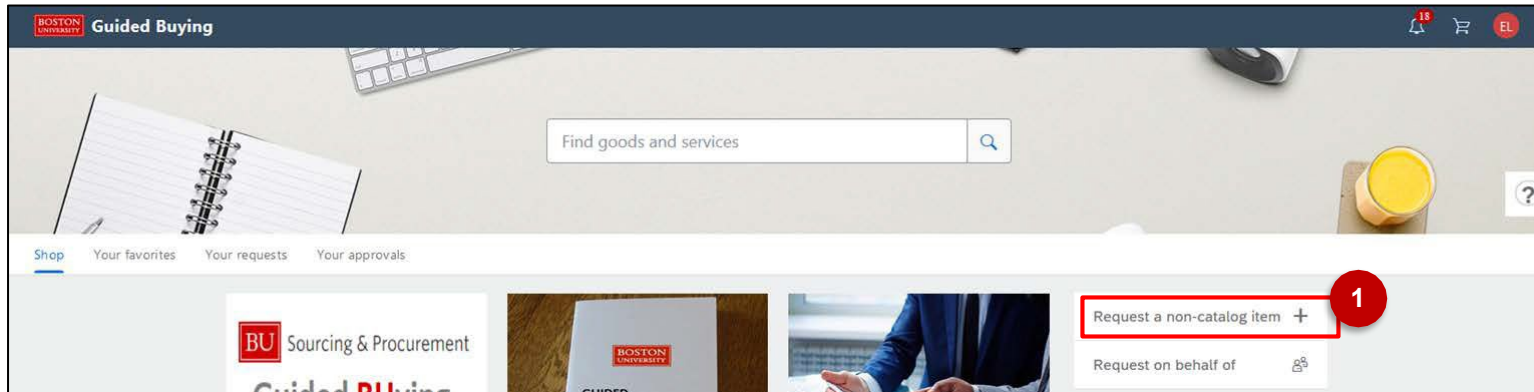
## PR Generation: Non-catalog request

Create a Non-catalog request to purchase a product/service not available through a **Guided BUYing** catalog. The "[Request a non-catalog item](#)" form is available on the **Guided BUYing** homepage and within each category tile.

1 Click "**Request a 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 a form titled 'Non-catalog request' with a back arrow on the left and 'Add to cart' and 'Cancel' buttons on the right. The form has several input fields: 'Product name' with an asterisk, 'Category' with an asterisk and a dropdown menu showing 'Choose a category', 'Description' with an asterisk and a large text area, 'Quantity' with an asterisk and a numeric input field, 'Unit of measure' with an asterisk and a dropdown menu showing 'LG', 'Unit price' with an asterisk and a numeric input field, and a 'Supplier' section with a dropdown menu showing 'Select a category to view company recommended suppliers' and a 'View all suppliers' button. The currency is set to 'USD'.

## PR 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. A red box labeled '2' highlights the 'Product name' field, which contains the text 'Relocating Office'. Another red box labeled '3' highlights the 'Category' dropdown menu, which is open and shows a list of categories including 'SUPPLIES-OFFICE', 'SERVICES-CONSULTING', 'SERVICES-LABORATORY', 'COMPUTER-SERVICES', 'SERVICES-MOVING', 'FURNITURE-CARPET-DRPS', 'SUPPLIES-APPLIANCES', 'SUPPLIES-ANIMALS', 'SERVICES-ADVERTISING', and 'CAPITAL-LABORATORY'. A red arrow points from the 'Browse all' link at the bottom of the category list to the next step.

The screenshot shows the 'Choose a category' dialog box. A red box labeled '4' highlights the search input field, which contains the text 'moving'. Another red box labeled '5' highlights the 'Choose' button, which is located next to the selected category 'SERVICES-MOVING - 78101804' under the 'General Goods & Services' section.

- 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.

**Moveable Capital Equipment:** When purchasing any moveable equipment, select the GL code 510100 Non-capital Minor Equipment. The PR will go to Property Management who will adjust the GL to capital equipment, asset tag, and update inventory.

## PR Generation: Non-catalog request

Provide a detailed description of the item or service. Enter the quantity, unit of measure, and unit price.

6

Product name \*  
Relocating Office

Category \*  
SERVICES-MOVING

6

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.

7

Quantity \*  
20

Unit of measure \*  
hour

Unit price \*  
250

USD

Supplier

View all suppliers

Recommended suppliers for you

Preferred

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

Preferred

ABC Moving Services, Inc.  
ID 0010005020  
Somerville, MA

Preferred

Spike Inc  
ID 0010006971  
Watertown, MA

Preferred

William B Meyer Inc  
ID 0010012124  
Northborough, MA

More

6 Provide detailed description of the product or service.

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

## PR Generation: Non-catalog request

If available, recommended suppliers will populate based on the selected category\*. To submit the PR, you must assign a supplier.

The screenshot displays the 'Supplier' section of the Guided Buying interface. At the top, there are currency and unit dropdowns (USD, hour). Below, a 'Recommended suppliers for you' section shows four supplier cards. The second card, 'ABC Moving Services, Inc.', is highlighted with a red box. A red arrow points from this box to a 'View all suppliers' button in the top right. Below the recommended suppliers, a 'Choose a supplier' modal is open, showing a search bar and a table of suppliers.

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

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 know the parent company name, search by that. If you don't know the parent name, view the [Registered Supplier Database](#), which is updated weekly and lists both the parent company name as well as the "Doing Business As" name (DBA) for all registered suppliers.

If you still cannot find the supplier, submit the [Supplier Request Form](#) located on the homepage of **Guided BUYing**. The Supplier Request Form must be submitted before engaging the supplier and before submitting a PR.

## PR Generation: Non-catalog request

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

View selected supplier.

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

A warning will display reminding requisitioners to select "Amount Based" as the Order Type if this order is for services or if you are expecting multiple invoices. Please choose "Standard" if the order is for materials or goods.

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

The screenshot shows the 'Non-catalog request' form. At the top right, there is a red circle with the number 10 pointing to the 'Add to cart' button. Below the form, there is a red circle with the number 11 pointing to the 'Check out' button in a modal window. 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 USD
- Supplier**: Chosen supplier: ABC Moving Services, Inc. (Somerville, MA, Vendor ID 0010005020). Contact information: Christine Perry, christine.perry@abcmoving.biz.

A modal window titled 'You have 1 item in your cart' is open, showing the item 'Relocating Office' with a price of \$250.00 USD and a quantity of 20. The total is \$5,000.00 USD. The 'Check out' button is highlighted with a red circle and the number 11.




## PR 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
				 

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	

> Accounting Cost Center (1471780000 (RADIO BOSTON))

> Shipping 975 Commonwealth Avenue, Boston

> Comments

> Attachments

✓ Others

Commodity Code ⓘ SERVICES-MOVING

Material Group 78101804 (Relocation Services)

### 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.

**\*Note:** Supplier Part Number must be less than 30 characters. If you have more than 30 characters, enter a comment and make it visible to the supplier.



## PR 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.

## PR 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 \*  
Standard

⚠ Order Type must be set.

Clear selection

Standard

Amount Based

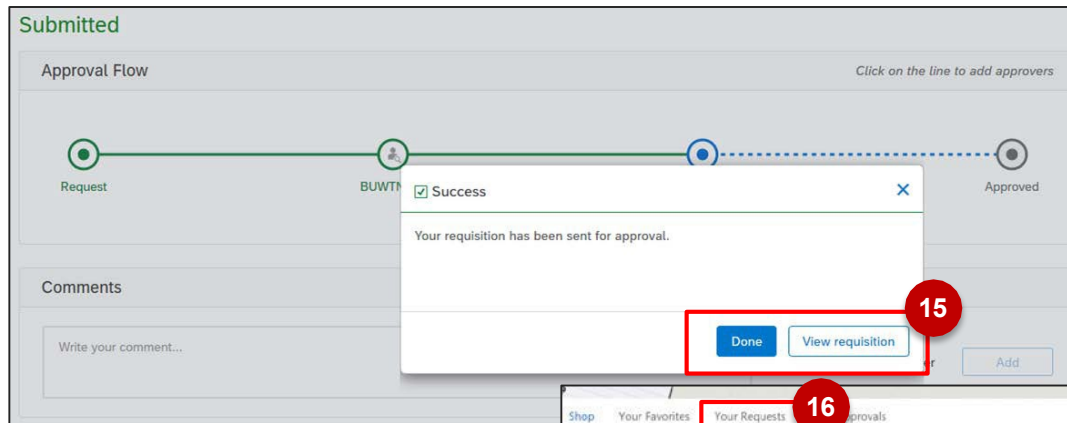
### Special Instructions:

- 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
  - Select **Standard** for materials.

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

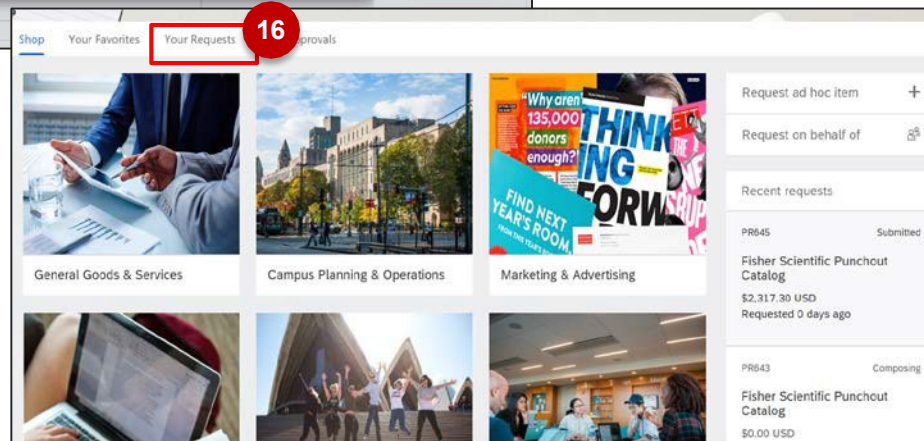
## PR Generation: Non-catalog request

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.

### 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.