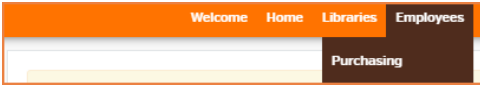


Non-Catalog Order & Payment Request Training Guide

Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.



Definitions

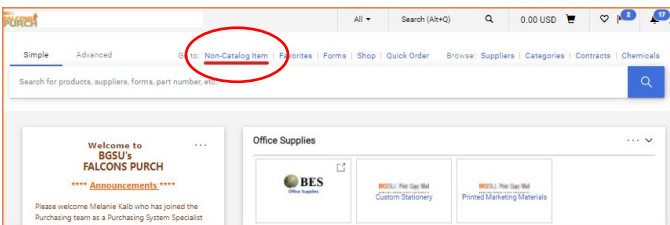
Non-catalog item- A shopping form that used when the supplier does not have either a hosted catalog or punchout Catalog. A quote from the supplier is required to be attached to the order.

Blanket Purchase Order - form used when an order will be have multiple shipments or services throughout the year.

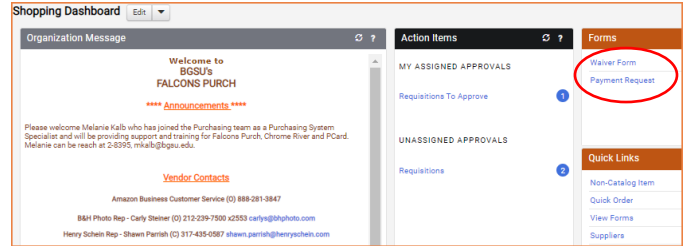
Payment requests- A form used when an invoice is provided prior to the service such as a membership or subscription. Payment requests can also be used when an ICA or master agreement is already in place and payment needs to be processed for services rendered.

Non-Catalog Item Shopping Form

From Shopping Home Page

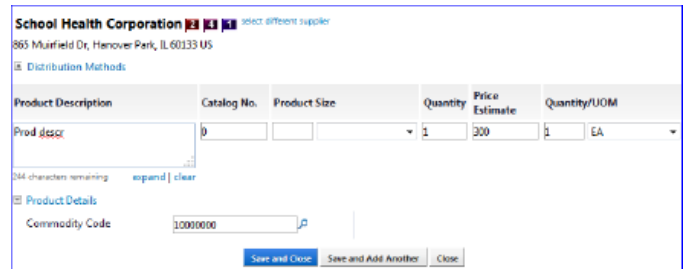


From Shopping Dashboard

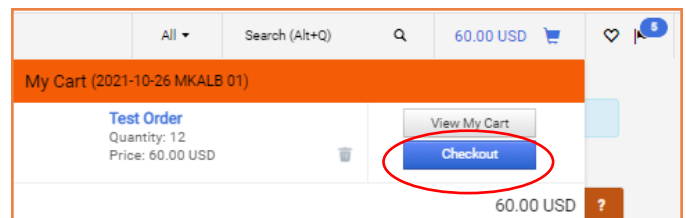


Chose the Non-catalog link on the home page. Complete the required fields on the form. If no catalog no. exists, enter N/A or 0. Size is not a required field. Select the correct commodity code the is relevant to the item(s) being ordered. To see the entire list commodity code options, click search. Select the correct code.

For goods use the accurate quantity of items being ordered combined with the UOM of EA. For services use the total price and the UOM of USD. To create multiple lines on the order, click on Save and Add Another. After all lines have been entered, select Save and Close.



Proceed to the upper right-hand corner. Select the shopping cart, then Checkout.



Attach the quote to the requisition in the External Notes and Attachments section.

Payment Requests

When paying a vendor for services/goods that have already been provided, you will need to submit the electronic payment request in Falcon's Purch. From the home page, scroll down to the bottom of the page and click on Payment Request.

From the Shopping Home Page

From the Shopping Dashboard

Complete the form. Please note that the Supplier Inv # field can contain only numbers, letters, forward slash (/) and hyphen (-). If there is no invoice number, enter the date of service. If there is no invoice date, enter the date of service.

Click on Supplier Search to locate the vendor that needs to be paid.

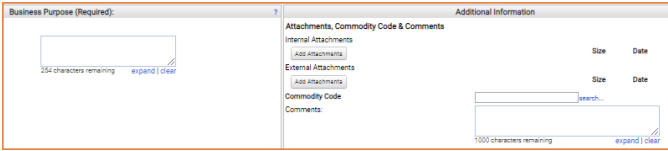
Select the remit to address that is shown on the supplier's invoice.

Enter the amount to be paid and the quantity.

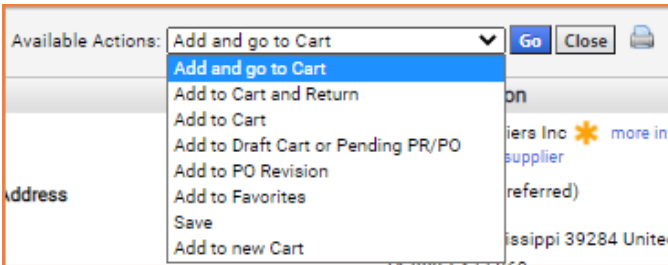
Select the Type of Payment and enter a Handling Code for the check distribution. If there are no specific instructions for Handling Code, select RE Regular Payments.

Enter the Business Purpose for the payment, this includes who, what, why, where and when. Attach

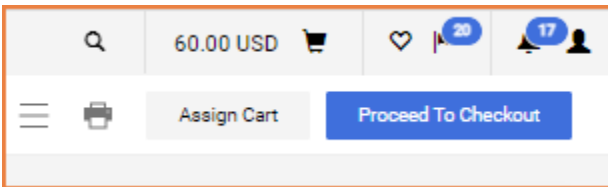
supporting documentation, and select a commodity code.



After completing the form, scroll to the top of the page to Add and go to Cart.



Proceed to checkout or assign cart to another user.

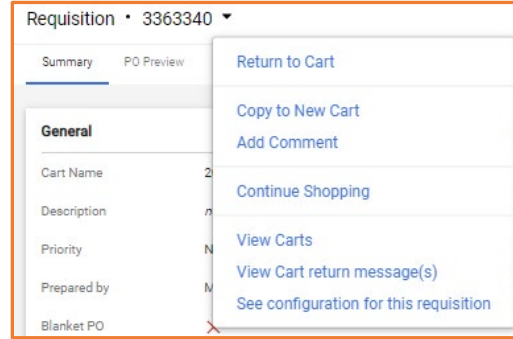


Proceed to Checkout



The checkout action creates the purchase requisition. The purchase requisition allows someone with the requester role to add chart fields, comments, attachments, make edits and place the order.

Tabs at the top of the page contain additional information about the document. Items are listed in the bottom section.


Document actions are available in the top left corner of the page. Click the drop-down menu next to the requisition number to see a list of actions that can be taken for the document.



Other actions are available in the top right corner of the page:

-  Show or hide the right sidebar.
-  Select an option from the Filter View drop-down menu to view individual sections on the page. For example, view header details only, view line items only, or view billing details only.

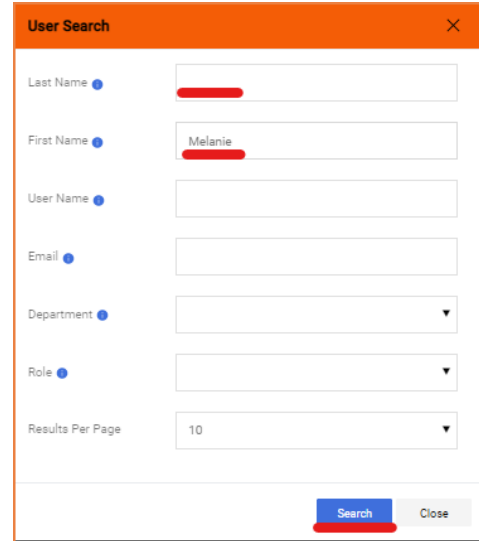
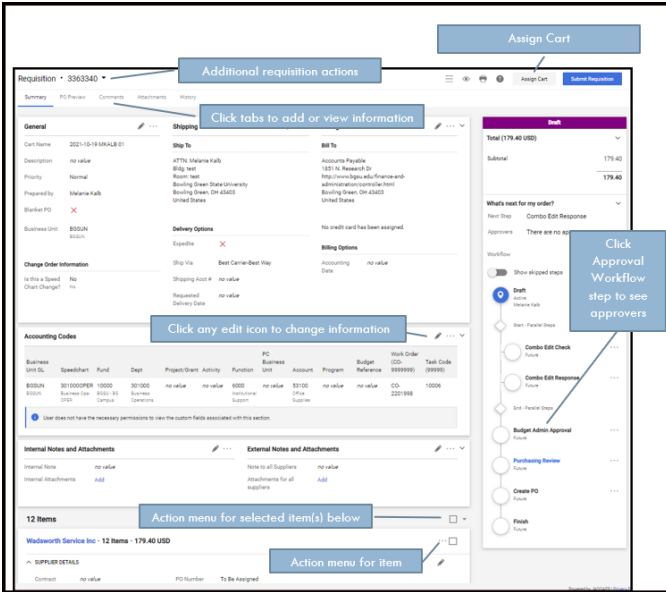
In the Line Items section, the actions menu for all selected items is the drop-down menu at the top right corner of the section. On individual items, click the action icon to see actions that can be applied to that item only.

Click tabs to view and  edit information within them. Click the edit icon to modify information in a section.

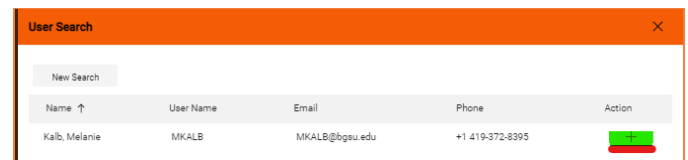
The right sidebar shows document totals and workflow. The document status and any messages are displayed near the top of the section. Users can view approval workflow information in the [What's next for my order?](#) section.

Select one of the action buttons to go to the next step.

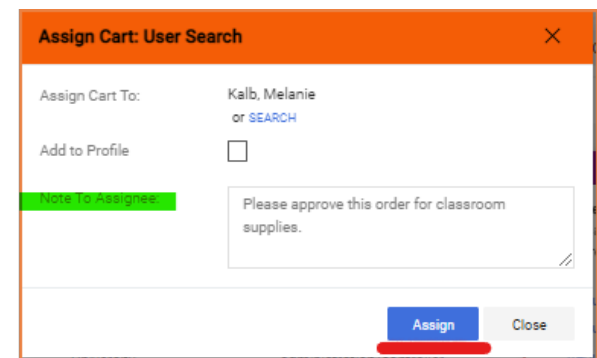




Select the + action to assign the cart to the correct User.



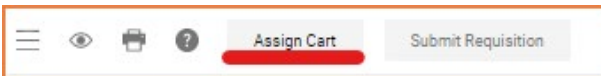
Type a note to the assignee. Click Assign.



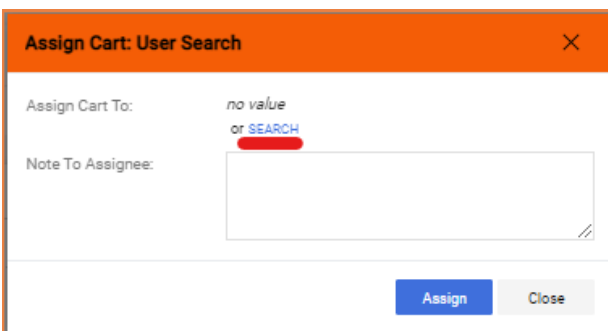
Assign Cart to Another User

Users that have the shopper role will only be able to assign the cart to a user that has a requestor role to place the order with the proper chart codes.

Select Assign Cart.



Search for a User. Click Search.



Type the first/last name of the person you would like to assign the cart to for order processing. Click Search.

Icons

- *** Click to display actions for items in a panel or page
- Click to edit information
- Collapse section
- or Expand section
- Click to add an item to Favorites
- Item is a user's personal Favorite