

Shop@UW (MDS) Purchasing Procedure

I. Purpose:

The purpose of this procedure is to provide a means for ME staff and students to easily purchase items from Shop@UW using shared accounts and better manage the correct funding being used for the expense.

II. Policy:

All MDS purchases will be initiated by the end user and executed by ME support staff. End users are responsible for providing the list of items and quantities to be purchased, a shipping address, funding information for the purchase and a PI name to approve the use of the funding for the purchase. All orders received by ME support staff before 2 PM will be ordered the same day.

III. Procedure:

- a. End user navigates to the following link:
http://mds.bussvc.wisc.edu/order/shopper_lookup.asp
 - i. Click on the guest account login on the page.
 - ii. Enter your NetID and Password.
 - iii. Shop and add items to your cart.
 - iv. When done, go to your shopping cart
 - v. Click on the print icon in the ribbon above your items
 - vi. Print to a PDF.
 - vii. Save on your desktop or in a designated file.
 1. Use the naming sequence (Last name_MDS_date)
 - viii. Fill out the online google form
https://docs.google.com/forms/d/e/1FAIpQLSer_zCwZOWn0PSsPZgILN3GDL7DkEzA46oYqX1iJR8NvZppSw/viewform
 - ix. Receive an automated response for confirmation the order was submitted
 - x. If the order is placed before 2pm it will be ordered that day
 - xi. Receive an email showing the purchase was made
- b. ME support staff executes the purchase
 - i. Identifies which MD number is appropriate.
 - ii. Logs into Shop@UW (MDS) and adds items to shopping cart.
 - iii. Adds correct funding to be used for the purchase in the "reference #" field at checkout.
 - iv. Saves the purchase confirmation in the Department MDS folder
 1. Titled as follows: Funding_LName(end user) _Order#
 - v. Sends the end user and PI a copy of the confirmation.
- c. ME support staff reallocates purchase during pre-close window of previous month
 - i. Moves the purchase confirmation to the ERC MDS Box folder>Completed Orders