Connect CAROLINA

INFOPORTE

Finance

Understanding ePro Supplier Catalog Orders

VERSION: 02/19/2020

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1 Overview of the Supplier Catalog Purchasing Process

In this chapter, you will learn how to:

- Identify the steps Departmental ePro Requesters complete to move Supplier Catalog purchases through ConnectCarolina successfully.

Understanding Supplier Catalog Orders

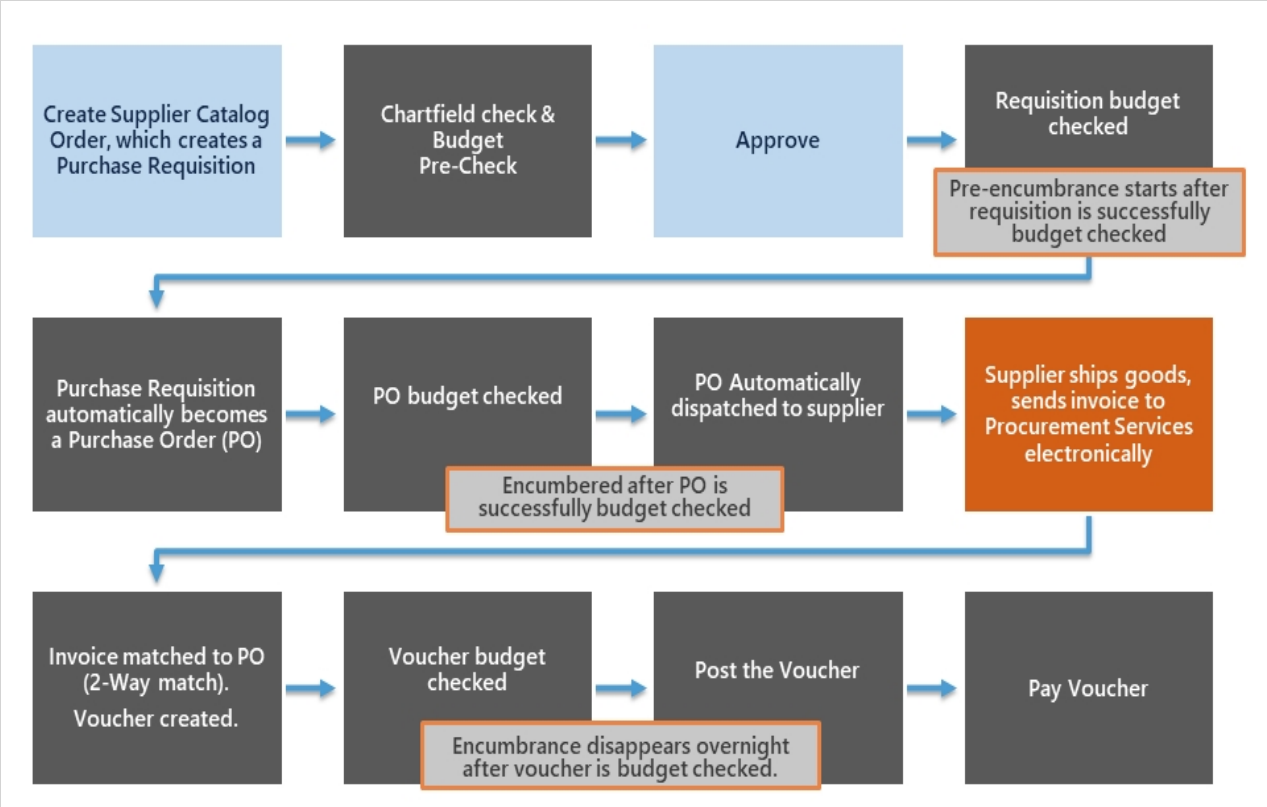
Electronic Procurement (ePro) streamlines the purchasing process. Supplier catalogs further simplify purchasing from select suppliers who extend special pricing and offers to UNC-Chapel Hill.

When departmental ePro requesters need to place an order for goods from a supplier listed in the supplier catalog, they go to the supplier's website through the ePro requisitions page in ConnectCarolina, select the supplier's catalog, add items to their shopping car on the supplier's site, submit the order from the supplier's site, and checkout back in ePro.

The system pulls the information from the supplier's website into ePro. The departmental ePro requester makes any necessary additions or changes on the Checkout - Review and Submit page, then saves and submits the order.

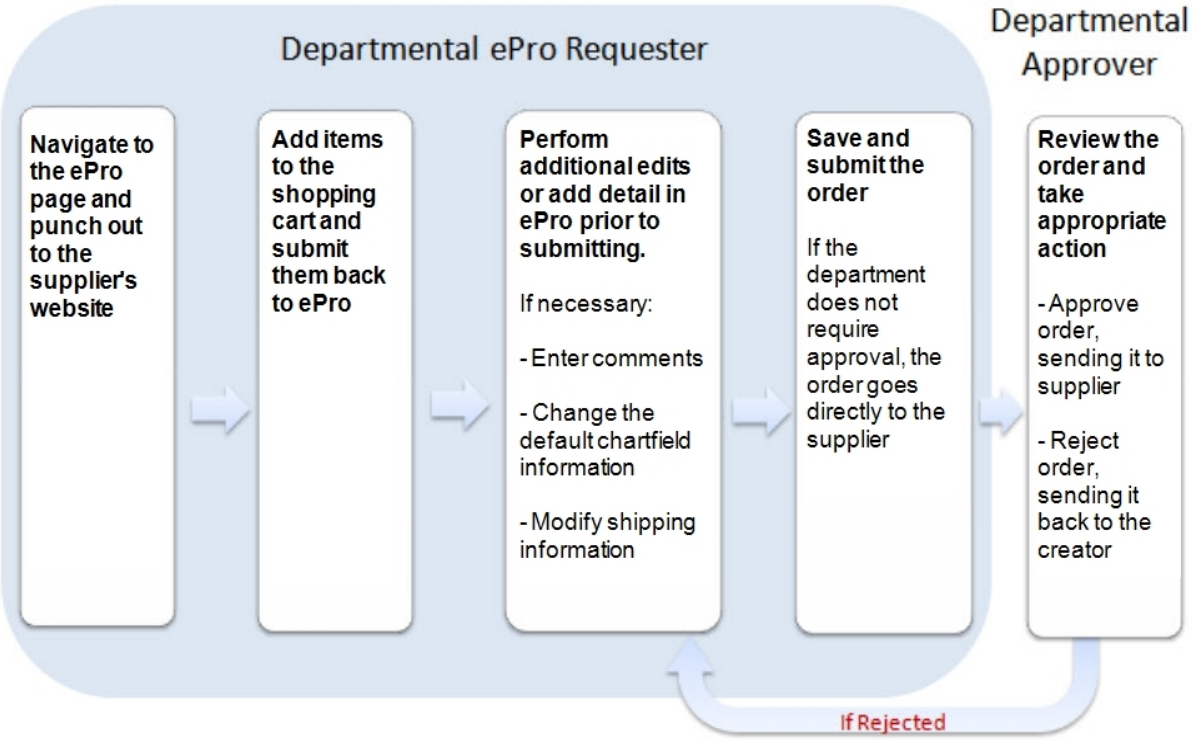
If your department requires approvals, the system initiates the workflow process by routing the document to the first approval level. Otherwise, the system sends the order to the supplier when the next batch process job runs, which happens every hour of the workday.

Below is a flowchart showing the steps your ePro supplier catalog order progresses through. Steps in the blue boxes are completed by a person - first the person placing the order and then the departmental approver. Gray boxes are done automatically by the system. Orange boxes are completed by the supplier.



What you may notice in the graphic above is that supplier catalog purchases are a type of requisition. Purchases made through supplier catalogs go directly from the departmental

approver to the supplier for fulfillment. Supplier catalog orders are not reviewed or approved centrally by a buyer or purchasing agent. Below is a detailed view of the actions you take during the supplier catalog purchasing process.



2 Requester Preferences

In this chapter, you will learn how to:

- Understand requester preferences.
- Set your requester preferences.
- View your requester preferences.
- Change your requester preferences.

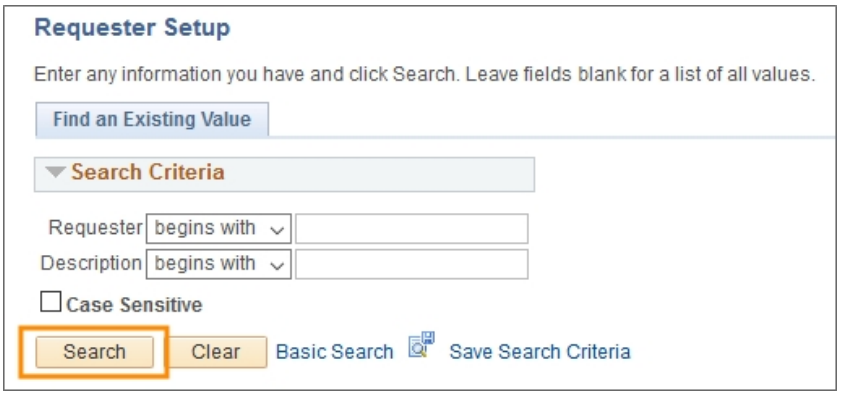
Working With Your Requester Preferences

Before a Departmental ePro purchasers can access supplier catalogs, Requester Preferences must be entered for required fields. Requester Preferences are default values established on the Requester Setup page. Once you set the default values, they are used on all of your supplier catalog and non-supplier catalog requisitions, unless you take action to change them within the individual purchase.

Setting Your Requester Preferences

Within ConnectCarolina, go to the Admin WorkCenter page and follow these steps to see, set up, or change your requester preferences:

1. Go to **Finance WorkCenter > ePro/PO > Requester Setup**.
2. Click the **Find an Existing Value** tab.
3. Do one of the following:
   - In the Requester field, enter your UNC Onyen.
   - In the Description field, enter your first and last name.
4. Click the **Search** button.

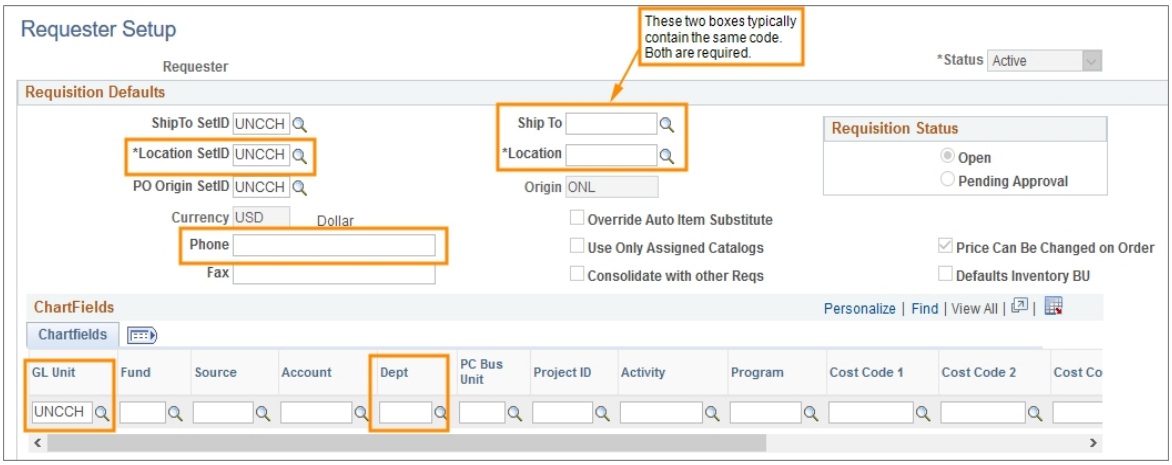


Result: The system displays the Requester Setup page.

5. Complete the required fields. You must enter a default for the following chartfields:

In this required field:	Do the following:
Location Set ID*	Before entering any default information, enter either UNCCH or UNCGA in this field.

In this required field:	Do the following:
Ship To*	Enter the ship to address or follow the steps below to search for the appropriate address: a. Click the **Lookup** (magnifying glass) icon. **Result:** The system displays the first 300 ship to addresses. b. In the Description field, change "begins with" to "contains." Type a word or two to describe your location and click **Look Up.** c. Click the link for the ship to address you need.
Location*	Enter your location or follow the steps below to search for your location: a. Click the **Lookup** (magnifying glass) icon. **Result:** The system displays the first 300 addresses. b. In the Description field, change "begins with" to "contains." Type a word or two to describe your location and click **Look Up.** c. Click the link for the location you need.
Phone*	Enter your phone number.
GL Unit*	Look up, or enter, the business unit.
Dept*	Look up, or enter, the department.



Note: Any field with a magnifying glass has a look up feature that reveals answer options when you click it. This can be helpful in finding the appropriate field text.

6. Complete the fields for any other values you want to create for your requisitions. The fields below are optional, but are especially useful if your purchases have a consistent Fund, Source, or ProjectID. It can save time and eliminate the opportunity for data entry errors.

In this optional field:	**Do the following:**
Fund	Look up, or enter, the Fund chartfield.. A Fund chartfield is a single 5-digit code capturing both major fund group (first 3 digits) and purpose (final 2 digits).
Source	Look up, or enter, the Source. The Source is a 5-digit chartfield indicating the specific Source that is supporting your transaction. **Note:** Fund and Source should be thought of as a pair. If a Source is entered with an incorrectly paired Fund in ConnectCarolina, the transaction will be flagged as a “combo edit” error.
Account	Leave this field blank. The Account value defaults are based on the category code chosen on the requisition, or from the supplier's website,and are typically different for each purchase. You are able to manually override the supplier's entry in the purchasing process, if needed.
Project ID	Look up, or enter, the Project ID. **Note:** The Project ID is the unique grant identifier. It is a 7-digit code that begins with a 5. For many contracts, grants and capital projects, this field is required.
Activity	If you are entering a Project ID, enter the associated activity code. This value will always be 1 unless it is for a capital project. For many contracts, grants and capital projects, this field is required.
PC Business Unit	If you are entering a Project ID, enter the associated PC business unit. For many contracts, grants and capital projects, this field is required. There are only two choices. • The CHOSR chartfield indicates the transaction falls into the activities of the Office of Sponsored Research (OSR). • The CHCIP chartfield indicates the transaction is a capital improvement project.

In this optional field:	Do the following:
Program	Look up, or enter, the Program chartfield. **Note:** The Program chartfield is used by certain areas such as the College of Arts & Sciences and various professional schools to capture and track programmatic information and spending.
Cost Code 1	Look up, or enter, Cost Code 1. **Note**: The optional Cost Code chartfields are available to assist schools and departments to capture financial information in the way it is useful to each department - usually for tracking and reporting.
Cost Code 2	Look up, or enter, Cost Code 2.
Cost Code 3	Look up, or enter, Cost Code 3.
Affiliation	Look up, or enter, the Affiliation.
Fund Affiliation	Look up, or enter, the Fund Affiliation.

7. Click the **Save** button.

   Result: The system saves the default values, which fill in automatically when you create a supplier catalog or non-supplier catalog requisition.

3 Ordering from a Supplier Catalog

In this chapter, you will learn how to:

- Create a supplier catalog order.
- Submit a supplier catalog order.

Placing an Order from a Supplier Catalog

Departmental ePro requesters use the supplier catalog to order supplies from any supplier listed in the supplier catalog. These suppliers extend special pricing and offers to UNC-Chapel Hill.

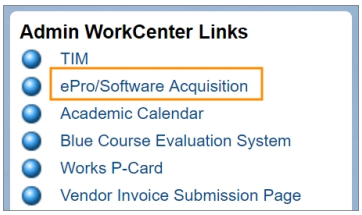
Most supplier catalog orders cannot exceed $5,000. Exceptions to the $5,000 maximum are noted in ConnectCarolina on the ePro Supplier Catalog page. If you need to make a purchase from a supplier listed in the catalog for an amount that exceeds the set maximum for the supplier, you will create a purchase requisition instead.

Creating a Supplier Catalog Order

Once you have your Requester Preferences set, you can get to the supplier catalogs. If you have not set your Requester Preferences, go to *Working With Your Requester Preferences, page 8* for instructions on setting them. You cannot access the supplier catalogs until required Requester Preferences are set.

Once you have your Requester Preferences set and are ready to place an order, follow these steps to create a supplier catalog order.

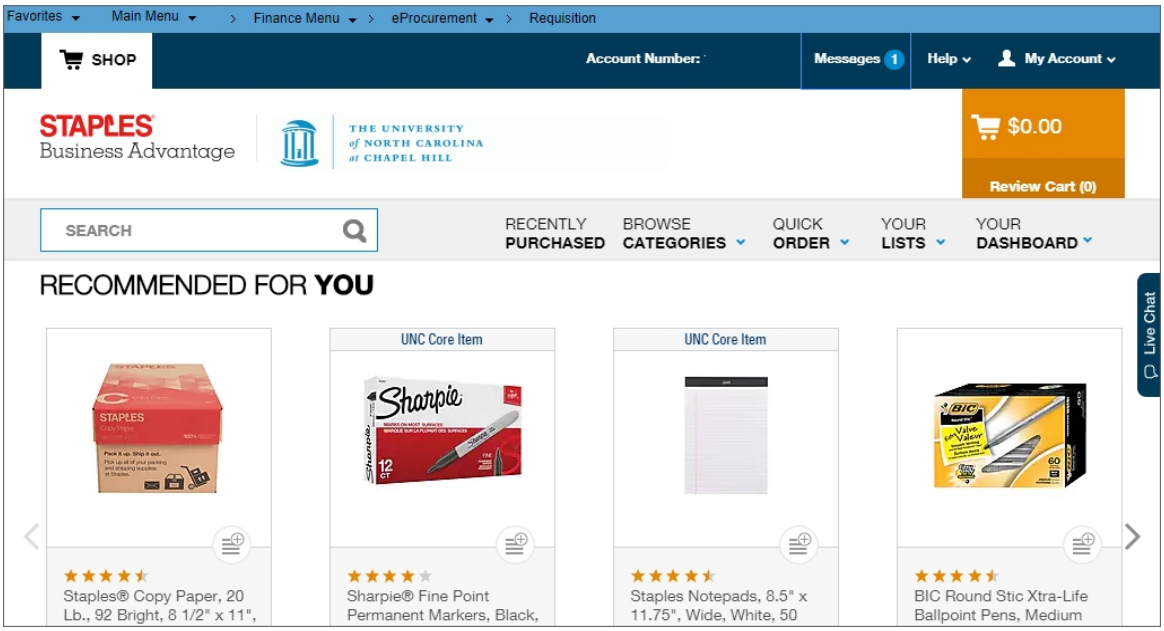
1. From the Admin WorkCenter homepage in ConnectCarolina select **ePro/Software Acquisition** from the Admin WorkCenter Links tile.



2. Click the link for the supplier you want to order from. In our example, we're ordering from Staples.

Result: The system shows the supplier's catalog page. You remain within the eProcurement supplier catalog process even when you are on a supplier website.

Note: You will only see the supplier catalogs you have access to.



3. Select one or more products from the supplier's catalog to order.

4. Submit the order from the supplier's catalog site, which brings you and your order back to ePro.

   Notes:

   - Minimum order amounts vary by supplier. The supplier's website will display an error message if your order is below the supplier's minimum order amount for UNC-Chapel Hill.

   - Each supplier's catalog is different and the label on the button to submit your order may vary.

   Result: ConnectCarolina displays the ***Finalizing Your Order on the Checkout - Review and Submit Page, page 16*** with the products you selected from the catalog.

Finalizing Your Order on the Checkout - Review and Submit Page

Once you submit your order on the supplier's catalog, you are brought to the **Checkout - Review and Submit** page. If you have not submitted an order yet, you cannot access these Checkout tools. Refer to *Placing an Order from a Supplier Catalog, page 14* for information on creating supplier catalog orders.

Completing Your Order

1. After you submit an order from a supplier catalog, you have an opportunity to edit or add details to your requisition from the Checkout - Review and Submit page. You can complete any or all of the following optional steps:

   - *Naming Your Supplier Catalog Order, page 20*
   - *Deleting Lines from Your Supplier Catalog Order, page 21*
   - *Adding, Seeing, and Deleting Attachments From Your Supplier Catalog Order or Purchase Requisition, page 24*
   - *Changing the Information That is Filled in Automatically for Each of Your Orders Based on Your Requester Preferences, page 33*
   - *Splitting the Funding on One Line of Your Order , page 30*
   - *Mass Change: Changing the Shipping Instructions or the Chartfield Values for an Entire Requisition, page 36*

2. When you have finished editing your supplier catalog order, or if you don't need to edit or add comments to your order, click the **Pre-Check Budget** link.

Note: If prompted, click the **OK** button to confirm that you want save your order and pre-check the budget. If you have previously saved the order, you will not be prompted.

Result: After you Pre-Check Budget, the system displays one of the following:

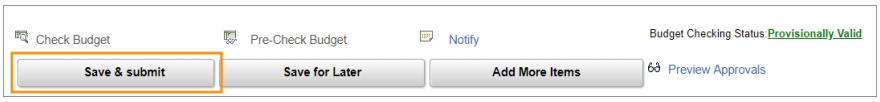
- If there is enough budget, the **Save & submit** button becomes active and clickable.
- If there is not enough budget, the system displays an error message. You can work with your business manager to move budget to the chartfield string or to

use different chartfield values. Once fixed, you will need to click Pre-Check Budget again to move forward in the ordering process.

3. Do one of the following:

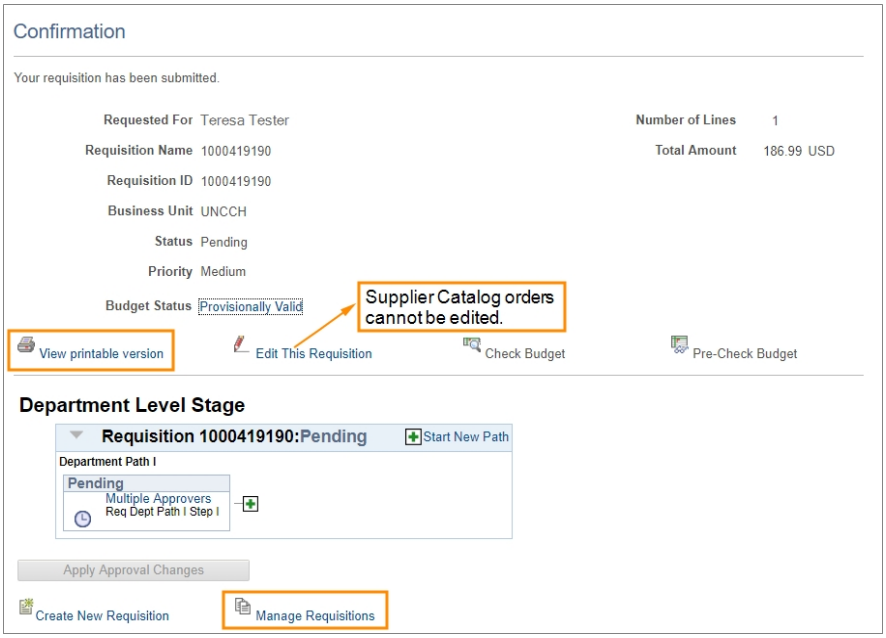
- If you want to save the requisition to work on later, click the **Save for Later** button. When you are ready to finish the requisition, refer to the *Accessing Your Recently Ordered Items, page 46* for information about finding and completing your order.

- If you are ready to submit the requisition, click the **Save & submit** button.



Results: The system does both of the following:

- Routes the document to the first approval level, which is typically a departmental approver.
- Displays a confirmation page, like the one below, that allows you to:
    - see the printable version of the requisition and
    - go directly to the Manage Requisitions page.



Note: As the requisition moves through the fulfillment process, additional information - like the PO Number - is added to the requisition. If you generate a printed copy of the requisition later in the process, it will have more information.

4 Editing and Adding Details to Your Supplier Catalog Order

In this chapter, you will learn how to:

- Name your ePro supplier catalog order.
- Delete lines from your ePro supplier catalog order.
- Enter comments to your entire ePro supplier catalog order.
- Attach documents to a supplier catalog order.

Naming Your Supplier Catalog Order

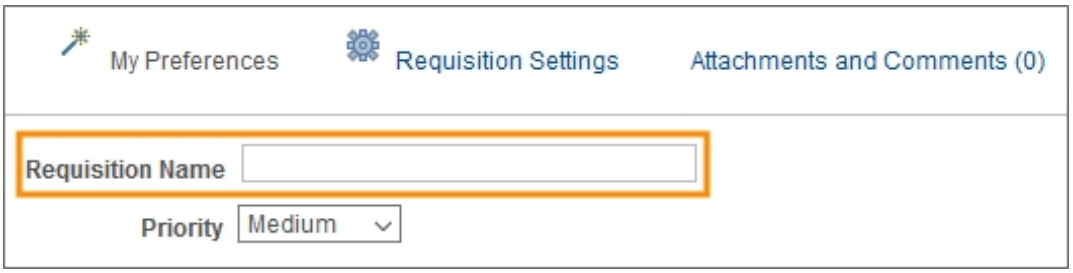
Once you have gone to a supplier catalog and submitted an order, you can name the order from the Checkout - Review and Submit page. Refer to *Placing an Order from a Supplier Catalog, page 14* for details on creating a supplier catalog order.

If you want the ability to search for an order by name in the future, consider naming it. If you do not enter a Requisition Name, the Requisition Name will default to the Requisition Number of your supplier catalog order.

Supplier catalog orders turn into requisitions as they move through the fulfillment process. Therefore, order and requisition may be used interchangeably in many cases.

1. Once you have submitted an order from an ePro Supplier Catalog website, you can name your order from the Checkout - Review and Submit page.

In this field:	**Do the following:**
Requisition Name	Enter a name to help you identify the supplier catalog requisition later. Consider following a consistent naming convention to assist you in searching and identifying orders more quickly.



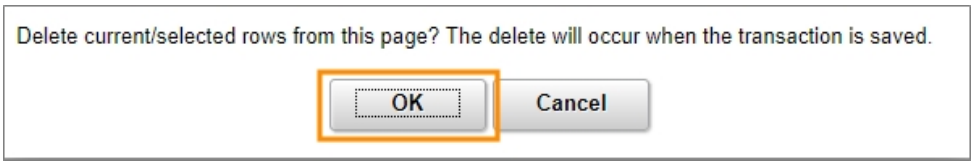
2. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

Deleting Lines from Your Supplier Catalog Order

If you determine that you need to remove one or more lines from your order, you can delete them before saving and submitting your order.

1. In the row that you want to delete, click the **Delete** icon.

2. When prompted, click the **OK** button to confirm that you want to delete the selected line.



Result: The system removes that requisition line.

Note: If the order has already been saved and you delete every line, the system will display an error message. You must leave at least one line of the order intact or start a new order from scratch.

3. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

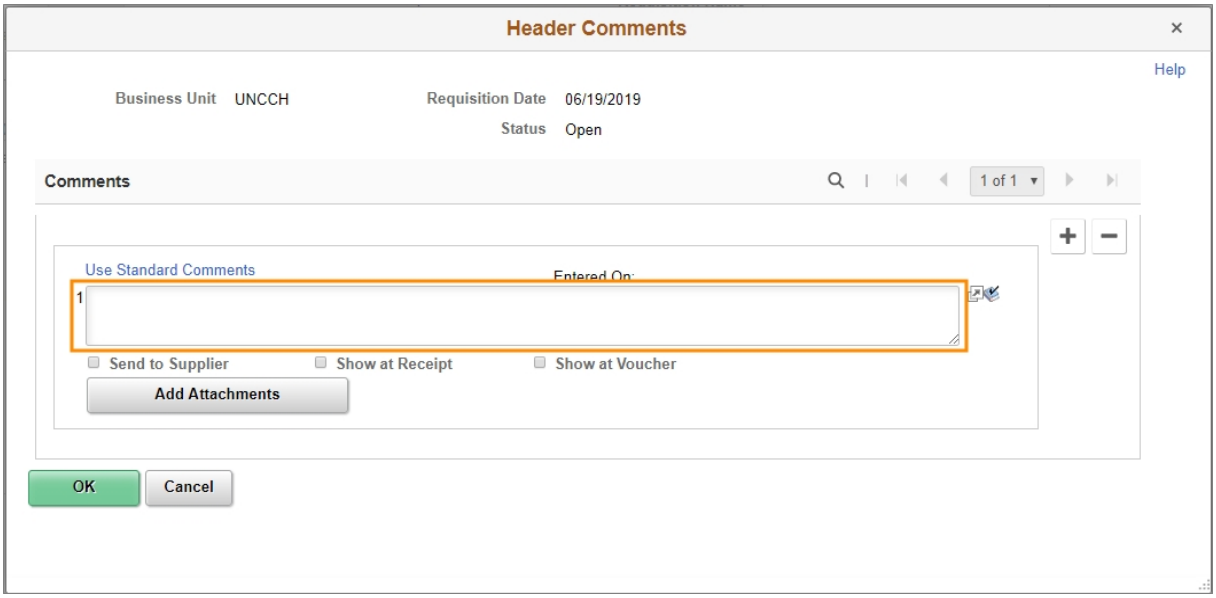
Entering Comments that Apply to Your Entire Order

If you need to, you can enter comments that apply to the entire order. These are commonly referred to as header comments.

1. On the top of the Checkout - Review and Submit page, click the **Attachments and Comments** link.

Result: The system displays the Header Comments page.

2. Enter information about your order in the Comments field.

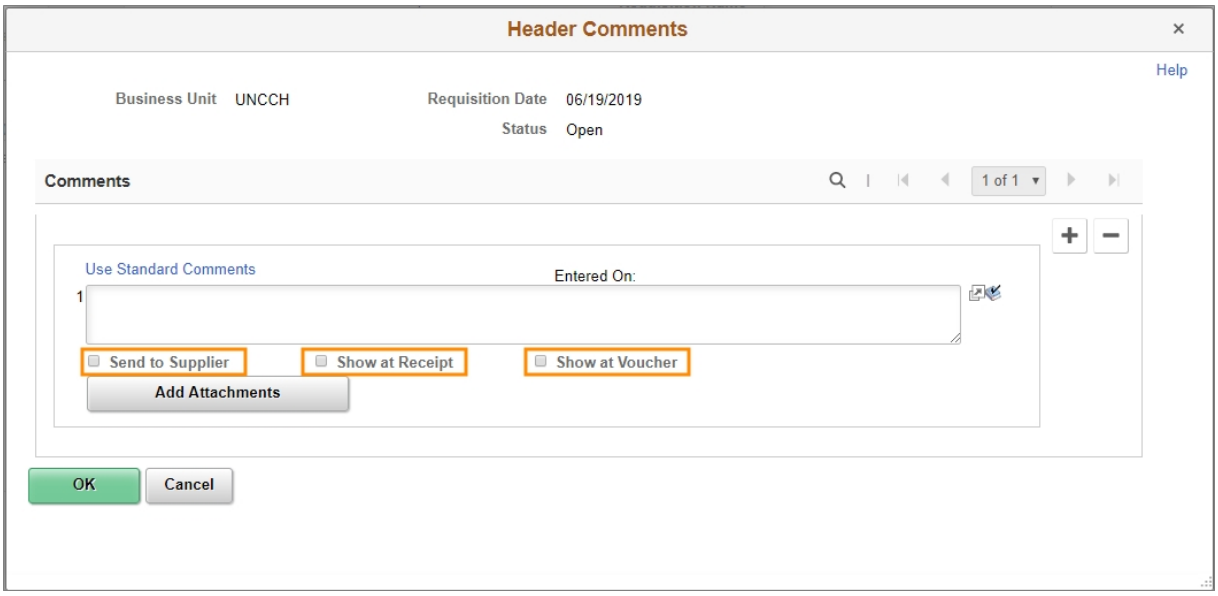


Note: Some purchases require specific information to be added in the header comments. Example:

- Airgas and ARC3 Cylinder Return Purchases require header comments to contain a cylinder bar code, a pickup address, a pick up room number, and a contact phone number. You must check **Send to Supplier** on Airgas and ARC3 Cylinder Return Purchases to ensure your order can be fulfilled.

3. Under the Comments field, mark the checkboxes to indicate where you want the comment to be visible. You can mark as many checkboxes as necessary.

In this field:	Do the following:
Send to Supplier	Mark this checkbox if you want the comment to appear on the purchase order that is sent to the supplier. **Caution:** Suppliers may not read these comments. If you have special instructions, it is best to call the supplier in addition to entering a comment for suppliers.
Show at Receipt	Mark this checkbox if you want the comment to appear on the receipt documentation.
Show at Voucher	Mark this checkbox if you want the comment to appear on the voucher.



4. Click the **OK** button to save the comment and return to the Checkout - Review and Submit page.

5. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

Adding, Seeing, and Deleting Attachments From Your Supplier Catalog Order or Purchase Requisition

You may attach documents to a supplier catalog order or purchase requisition.

For purchases outside the supplier catalog ordering process, your comments and attachments can be seen and reviewed by central purchases staff.

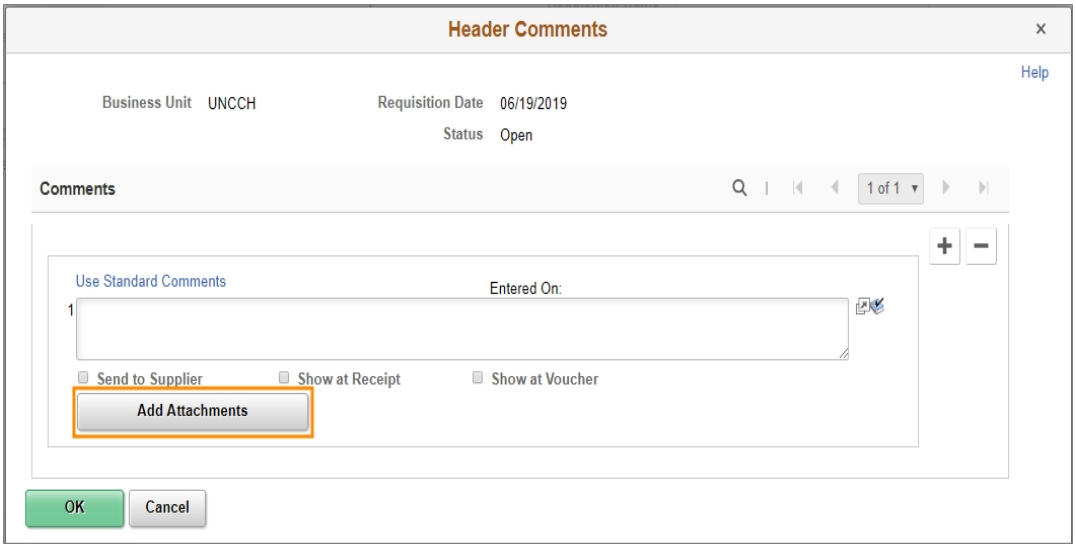
However, supplier catalog purchases are not reviewed by central purchasing. They do not see or review comments or attachments for supplier catalog orders. Attachments to supplier catalog orders can only be seen by you and your departmental approver unless you click Send to Supplier (step 6).

Adding Attachments to a Supplier Catalog Order or Purchase Requisition

1. If you want to attach a document, click the **Attachments and Comments** link.

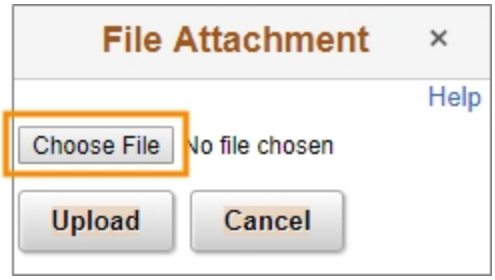
Result: The system displays the Header Comments page.

1. Click the **Add Attachments** button.



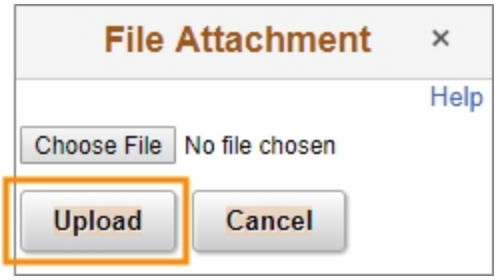
Result: The system displays the File Attachment box.

2. Click the **Choose File** button.



3. Choose the file you want to attach by finding the file on a local or network computer drive, and double-clicking on the file name.

4. Click the **Upload** button.



Result: The system displays the attached file's name and Attachment Id.

5. Check **Send to Supplier**, so that the supplier will be able to see the attachment.

6. Do one of the following

- To attach more files, repeat steps 1-6.
- View and/or delete the attachment using the steps below.
- Click the **OK** button to return to the Checkout - Review and Submit page.

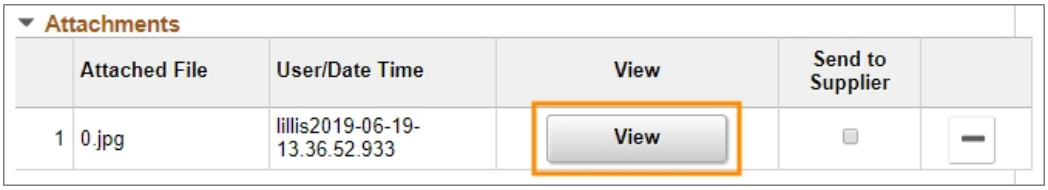
8. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

Seeing Attachments for a Supplier Catalog Order or Purchase Requisition

You may look at attachments to make sure they were scanned properly and can be read. You can see attachments by following the steps below.

1. Click the **Attachments and Comments** link from the right-side of the Checkout - Review and Submit page to see an attachment.

2. On the Header Comments page, click the **View** button.



Result: The file opens in a new window.

Caution: If you have an active pop-up blocker, it may block the system from opening the file. Please follow the instructions for your browser to allow pop-ups and click the **View** button again should your first attempt be blocked.

3. Close the window displaying the attachment image to complete other tasks.

4. Click the **OK** button to return to the Checkout - Review and Submit page.

5. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

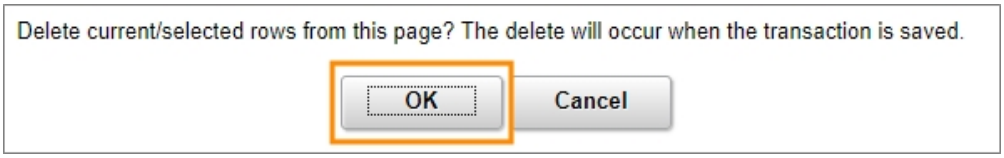
Deleting Attachments from a Supplier Catalog Order or Purchase Requisition

You may need to delete an attachment as you are working through the purchasing process. You can delete attachments by following the steps below.

1. Click the **Attachments and Comments** link from the Checkout - Review and Submit page to see an attachment.

2. On the Header Comments page, click the the **Minus** button at the right end of the attachment line.

3. Click the **OK** button to confirm that you want to delete the attachment.



4. Click the **OK** button to return to the Checkout - Review and Submit page.

5. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

5 Funding and Shipping Changes to an Order

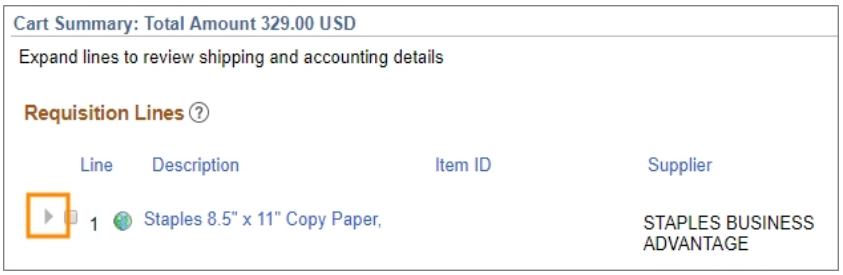
In this chapter, you will learn how to:

- Split the funding on one line of your order.
- Enter new chartfield information to override your requester preferences.
- Enter new shipping locations and instructions that override your requester preferences.

Splitting the Funding on One Line of Your Order

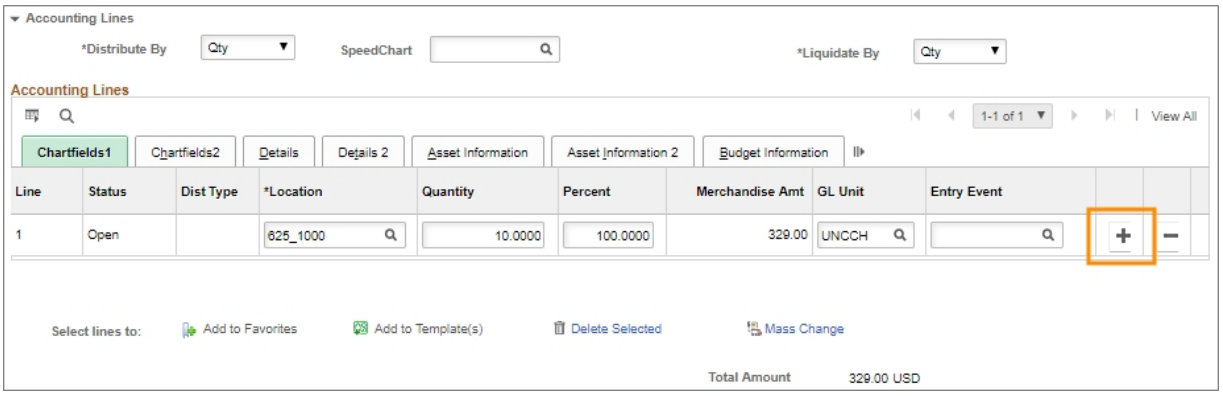
Splitting funding for supplier catalog orders and purchase requisitions is possible. If you need to split the charge for a single item between two or more chartfields, follow the steps below from the **Checkout - Review and Submit** page. If you have not submitted an order yet, refer to *Placing an Order from a Supplier Catalog, page 14* for information on creating supplier catalog orders.

1. To use multiple chartfield strings on any line, click the **down arrow** to the left of the line you would like to split funding.



Result: The system displays additional details, including Accounting Lines.

2. Click the **plus** icon in the Accounting Lines section as many times as needed to split charge appropriately.

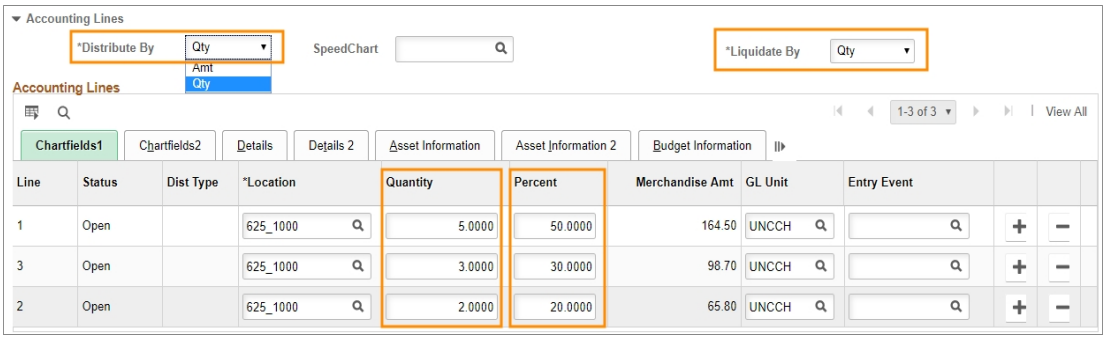


Result: The system displays additional accounting lines.

Note: If you need to Zoom in or out to see the full Accounting Lines section on the screen, hold down the CTRL key on your keyboard and push the + key to Zoom in or - key to Zoom out.

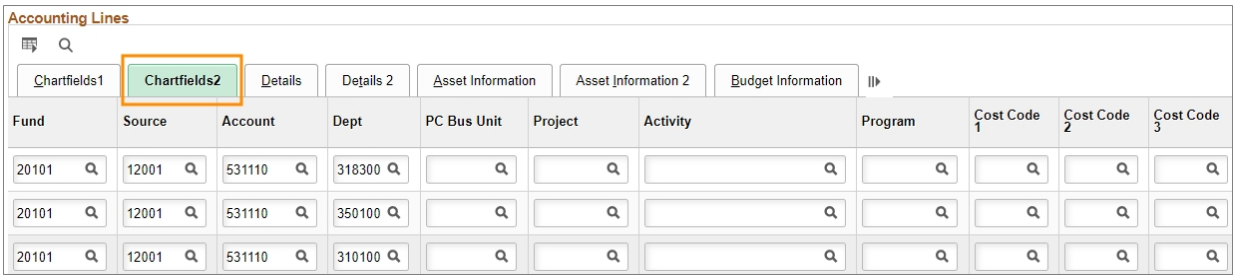
3. Complete the fields, if necessary:

In this field:	Do the following:
Distribute By	Choose the distribution option you want: • Select **Quantity** if you want to split the cost by quantity. • Select **Amt** if you want to split the cost by amount.
Liquidate By	Choose the option you want in the event that you end up recapturing some or all of the money in the event of a return or cancellation: • **Quantity** if you want to liquidate by quantity. • **Amt** if you want to liquidate by amount. **Note:** If you chose to distribute by amount, you must liquidate by amount. If you chose to distribute by quantity, you can liquidate by amount or quantity.
Location	Location is filled in by default on supplier catalog orders based on your user profile.
Quantity	If you chose to distribute by Quantity, enter the quantity for each line. If you chose to distribute by Amt, the system doesn't display this box.
Percent	If you chose to distribute by Amt, enter the percentage to assign to each line. If you chose to distribute by Quantity, leave this field blank.



Note: The system will not allow you to save the order unless the percents add up to 100 and the quantity adds up to the entire quantity in the order.

4. To enter chartfield strings, click the **Chartfields2** tab. You can change chartfield strings for all lines at the same time.



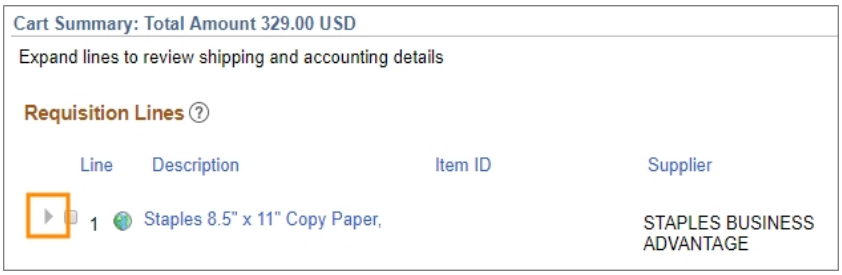
5. To divide the payment further, add more rows and chartfield strings by repeating steps 1 through 4.

6. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

Changing the Information That is Filled in Automatically for Each of Your Orders Based on Your Requester Preferences

The requisition line section displays information about each requisition line. The information defaults in from your requester setup information, but you may need to make a change. For example, you may want one specific line shipped to a different location than the other lines.

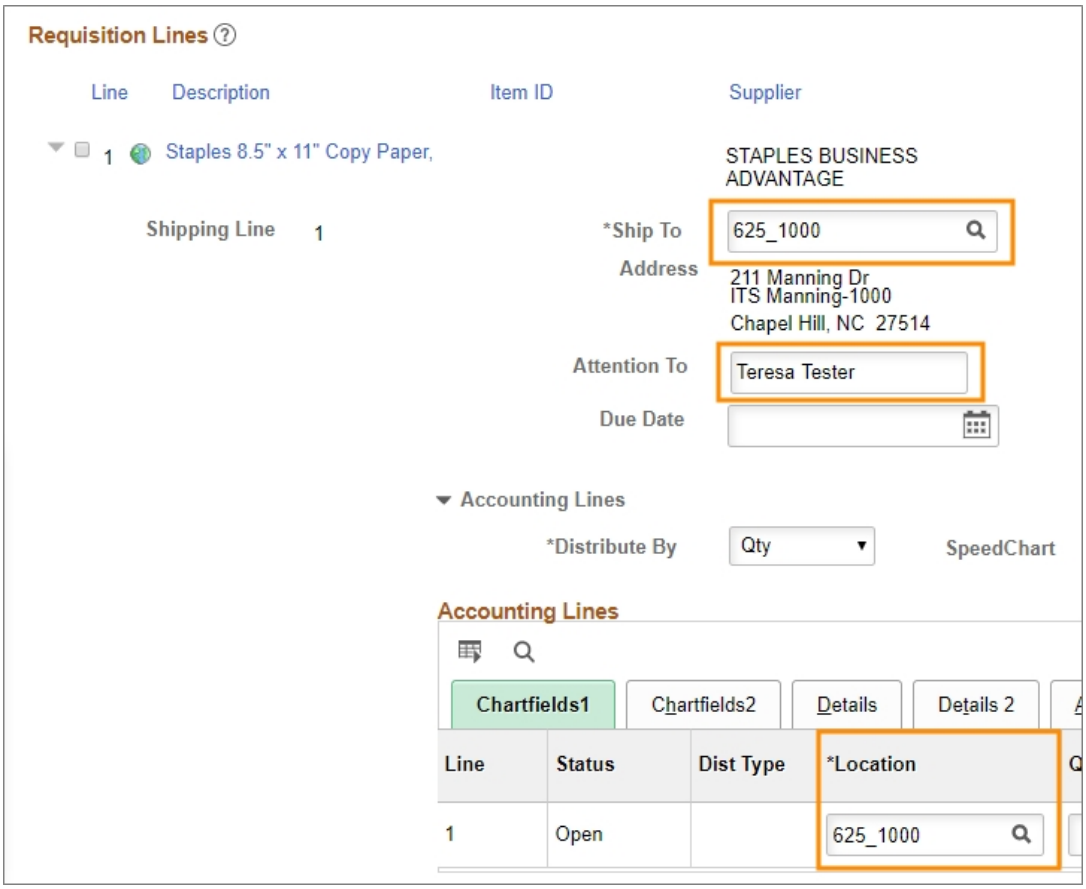
1. To change the requisition information for any line, click the arrow to the left of the line you would like to change.



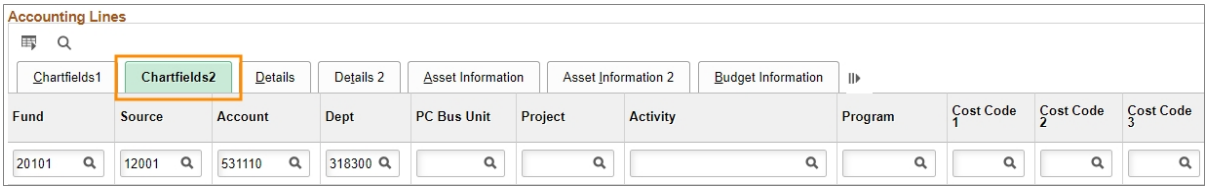
2. Complete any or all of the following fields:

In this field:	Do the following:
Due Date	This field is not used for supplier catalog orders at UNC-Chapel Hill.
Ship To	Enter the Ship To location or follow the steps below to search for the appropriate Ship To location: a. Click the **Lookup** (magnifying glass) icon. **Result:** The system displays the first 300 Ship To addresses. b. In the Description field, change "begins with" to "contains". Type a word or two to describe your location and click **Look Up.** c. Click the link for the Ship To location you need. **Result:** The system will send this line to the selected location.
Attention	Enter the name of the person to whose attention the shipment will be sent. **Note:** If you work in Auxiliary Services, enter the shop, job, and phase code here, if applicable.

In this field:	Do the following:
Location	Enter the location you are ordering from. Location is filled in by default for supplier catalog orders.
Quantity	Do not change the quantity. **Note:** If you accidentally selected the wrong quantity on the supplier's website, you will need to add items to your order and add the correct quantity then delete the original line. **Caution**: Deleting the line before adding a line with the correct quantity will require you to create an entirely new supplier catalog order.



3. To modify chartfield information, click the **Chartfields2** tab.



Result: The system displays any default chartfields from the Requester Setup page. The account number is provided based on the item ordered.

4. Enter new chartfields or modify the default chartfields, if necessary.

   Note: For information about chartfields, refer to the Chartfield Structure quick reference card at ccinfo.unc.edu.

5. Click the Save for Later button to make sure your changes are saved.

   Result: You will remain on the Checkout - Review and Submit page after saving.

6. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

Mass Change: Changing the Shipping Instructions or the Chartfield Values for an Entire Requisition

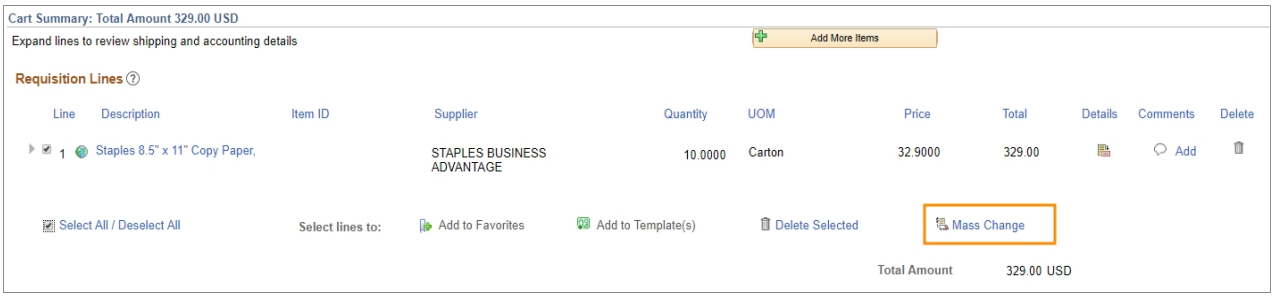
If you want to make the same change to every line item, use **Mass Change** to do so. Use this option to modify any of the following:

- shipping information.
- chartfields.

1. In the Requisition Lines section of the Checkout - Review and Submit page, check Select All/Deselect All.

   Result: All Requsition Lines have checked checkboxes.

2. Click the **Mass Change** button.



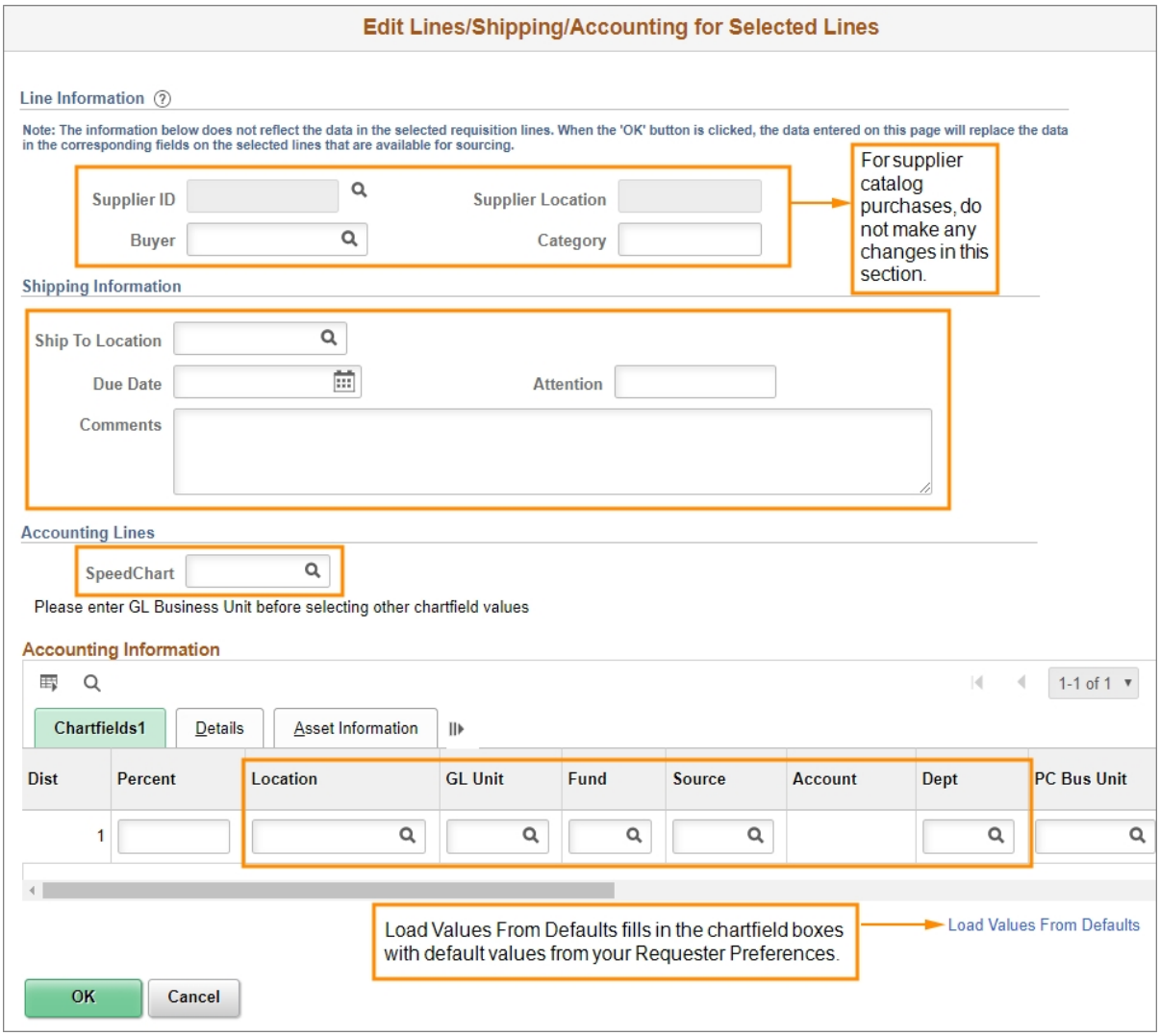
   Result: The system displays the Edit Lines / Shipping / Accounting for Selected Lines page.

   Note: All fields will come in blank, even if they have default values associated with them from your Requestor Preferences.

3. Enter new information in any field. Leaving a field blank will not affect the original value of that field. You may use Speedchart to speed up the process, but make sure you check all cost codes. You can click **Load Values From Defaults** to populate the boxes with your Requester Preference default values.

   Note: For information about chartfields, refer to the Chartfield Structure quick reference card at ccinfo.unc.edu.

   Important: For supplier catalog orders, do not change any of the Supplier or Category codes at the top, because they are determined by the supplier that you used and the items your ordered. If you fill in the **Buyer** field for a supplier catalog order, it sends your order through procurement, which does not handle supplier catalog orders. This will delay - and may negate - your order.

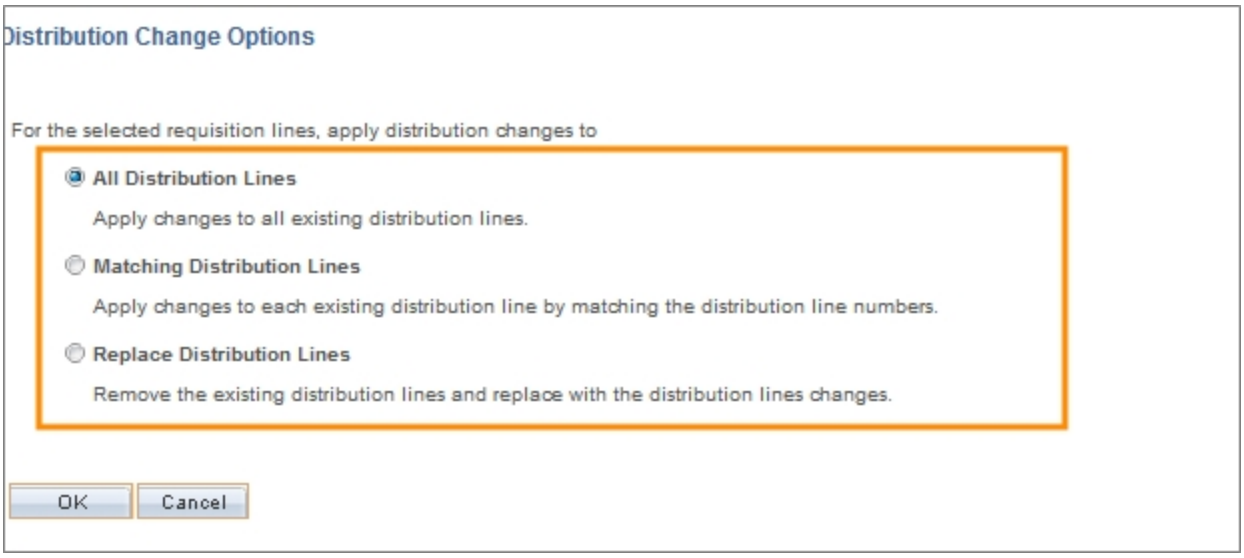


4. Click the **OK** button.

   Result: The system displays the Distribution Change Options page.

5. Choose the appropriate option:

In this field:	Do the following:
All Distribution Lines	Mark this checkbox to apply changes to all distribution lines.
Matching Distribution Lines	Mark this checkbox to apply changes to each existing distribution line by matching the distribution line numbers.
Replace Distribution Lines	Mark this checkbox to remove the existing distribution lines and replace them with distribution line changes.



6. Click the **OK** button.

   Result: The system changes the requisition header information and displays the Checkout - Review and Submit page.

7. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 16* for information about completing your order or for a list of additional edits you can make to it.

6 Finding, Seeing, and Printing Your Submitted Orders

In this chapter, you will learn how to:

- Find and use the Manage Requisitions page to search for a supplier catalog order that has already been created.
- Print a requisition.
- See the reason a requisition was rejected.
- See and use a requisition's life cycle.

Finding a Requisition

Searching a requisition is the first step to using the **Manage Requisitions** page.

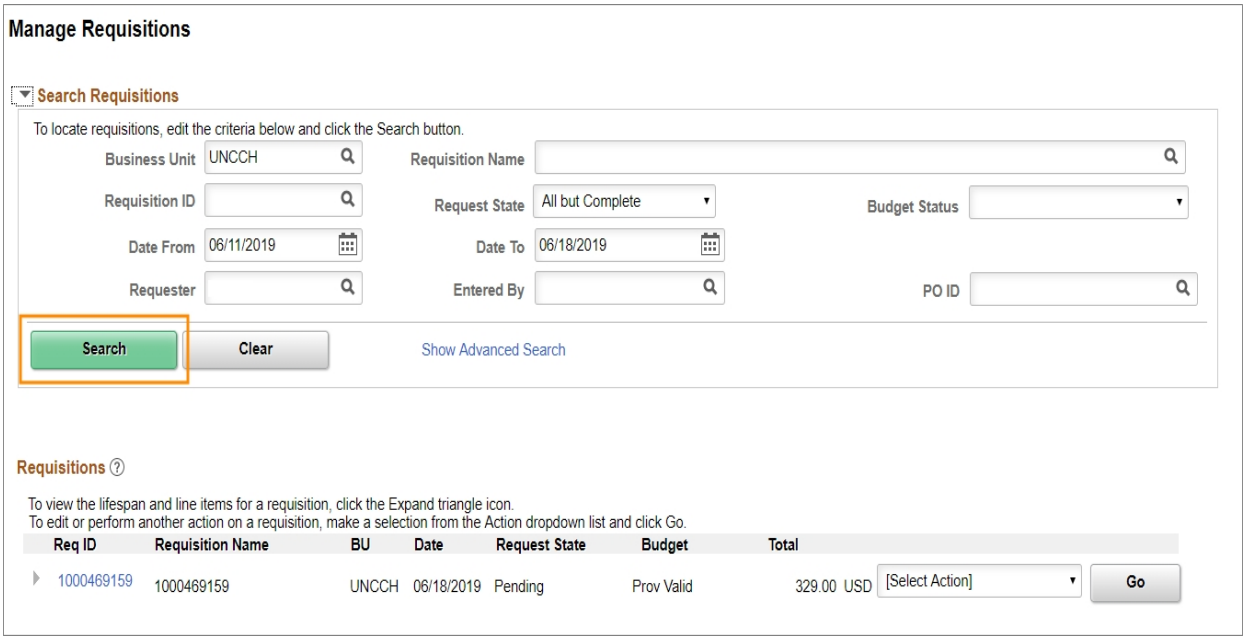
1. From the Admin WorkCenter page in ConnectCarolina, choose this menu option:

   Finance WorkCenter> ePro/PO > Manage Requisitions

2. On the **Manage Requisitions** page, complete one or more of the fields:

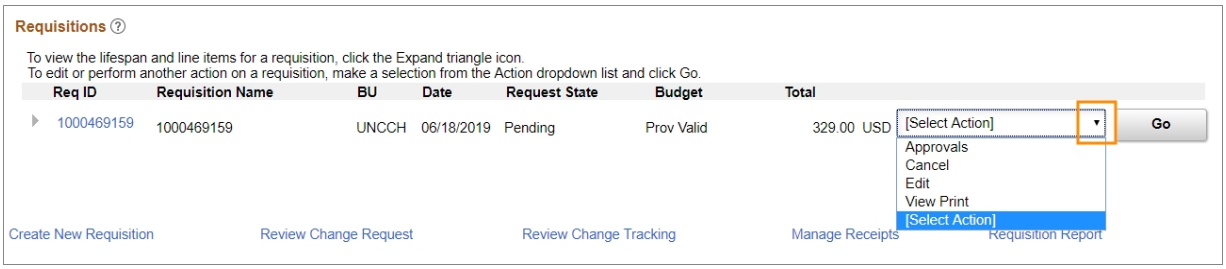
In this field:	**Do one or more of the following:**
Business Unit	Enter the business unit associated with the requisition you are searching for. Your default value should appear automatically if your requester preferences are set up.
Requisition Name	If the requisition was given a name, enter the name of the requisition you are searching for.
Requisition ID	If you know it, enter the requisition ID of the document you are searching for.
Request Status	If you want to see all of the requisitions with a certain status, such as pending, select that status from the drop-down list.
Date From	Use the Date From field to search for requisitions created beginning with a specific date.
Date To	Use the Date To field to search for requisitions created before a specific date.
Requester	Enter the Onyen, also known as the Requester ID, of the person listed as the requester on the requisition you are searching for. **Note:** The requester is the department contact for the requisition.
Entered By	Enter the Onyen of the person who entered the requisition you are searching for.
PO ID	Enter the Purchase Order ID associated with the requisition you are searching for, which you may find on the printed version of the requisition if printed after a PO number was issued for the order.

3. Click the **Search** button.



Result: The system displays the first 50 results that meet the criteria you specified. If you don't see the requisition you are searching for within those results, enter more criteria in the search fields and try again.

4. Once you see the requisition you are looking for in your search results, you can select an action from the drop-down or use the arrow to expand the row, which reveals additional information.



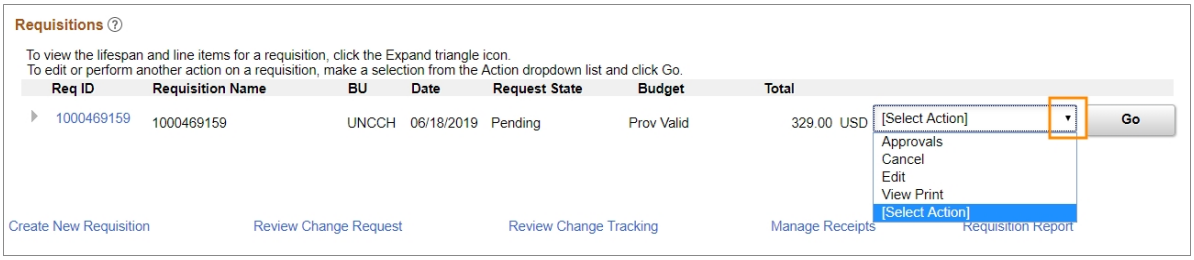
Printing a Requisition

If you need a PDF file or printed copy of your requisition, you can do that on the Manage Requisitions page with the View Print action. Follow the steps below to learn how.

1. Refer to *Finding a Requisition , page 40* for detailed information about finding your requisition. If you are already familiar with that process go directly to the path below to complete the remaining steps.
   Finance WorkCenter > ePro/PO > Manage Requisitions.

1. Once you find the requisition you want to print, click the Select Action drop-down.

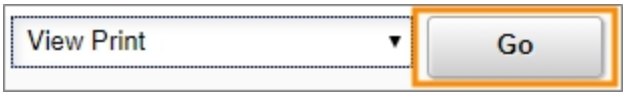
   Result: The Select Action menu expands.



2. Click the **View Print** button.

   Result: Select Action menu collapses and View Print is visible in the selection box.

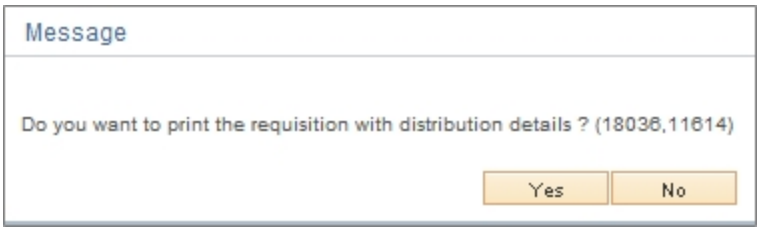
3. Click the **Go** button.



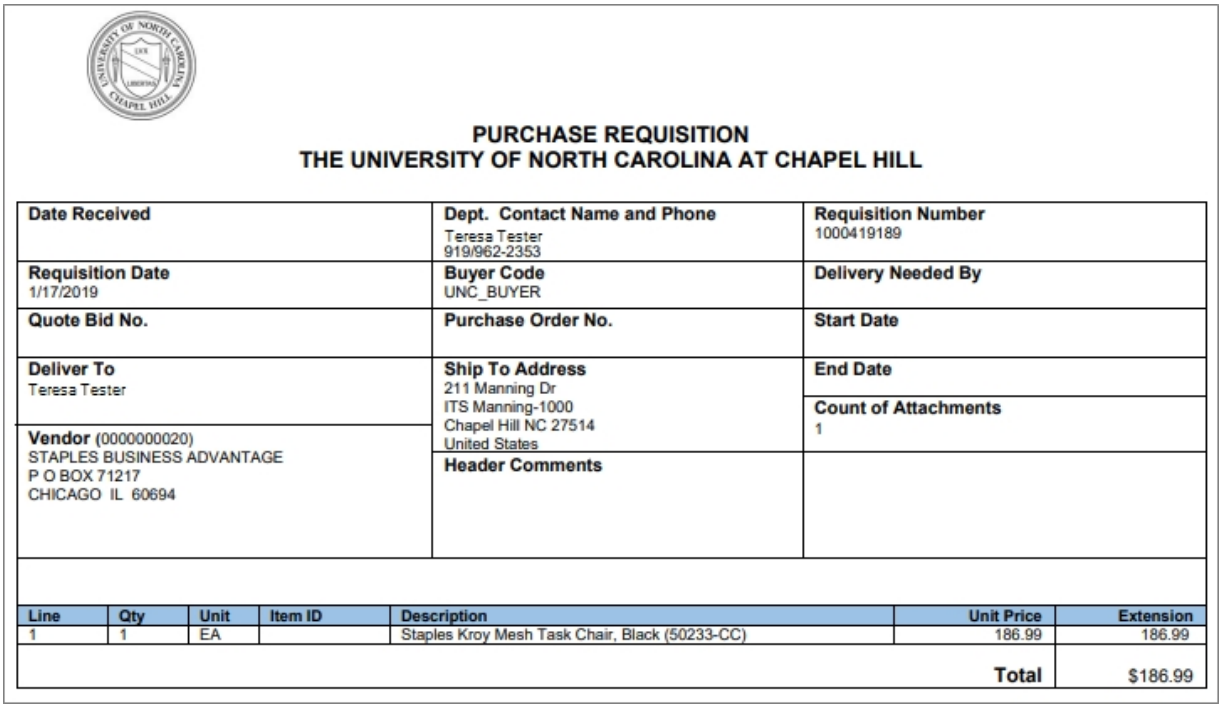
4. If you have a pop-up blocker active, it will block the system from displaying the PDF generated by these steps. Follow the instructions for your browser to disable the pop-up blocker for this site or temporarily so that you can print.

5. When the system asks if you want to print distribution details with the requisition, choose one of the following:

   - **Yes** to print all of the chartfield information for every line of the requisition.
   - **No** to print only a high-level summary of the requisition.



Result: The system opens a new browser window with a printer-friendly PDF report.



PURCHASE REQUISITION
THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

Date Received	**Dept. Contact Name and Phone** Teresa Tester 919/962-2353	**Requisition Number** 1000419189
Requisition Date 1/17/2019	**Buyer Code** UNC_BUYER	**Delivery Needed By**
Quote Bid No.	**Purchase Order No.**	**Start Date**
Deliver To Teresa Tester	**Ship To Address** 211 Manning Dr ITS Manning-1000 Chapel Hill NC 27514 United States	**End Date**
		Count of Attachments 1
Vendor (0000000020) STAPLES BUSINESS ADVANTAGE P O BOX 71217 CHICAGO IL 60694	**Header Comments**	

Line	Qty	Unit	Item ID	Description	Unit Price	Extension
1	1	EA		Staples Kroy Mesh Task Chair, Black (50233-CC)	186.99	186.99
					Total	$186.99

7. Use your browser's print functionality to print the PDF requisition.

8. Close the new window your browser opened that displayed the printer-friendly requisition. You will still be on the Manage Requisitions page and able to choose another action.

Seeing the Reason a Requisition was Denied

If your requisition is denied, it is helpful to view the comments from the approver to find out why.

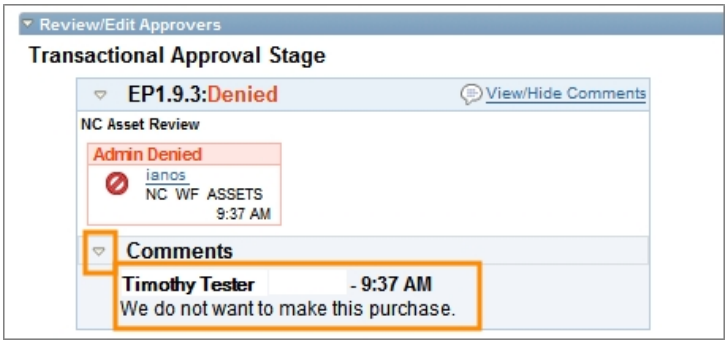
1. Refer to *Finding a Requisition , page 40* for detailed information about finding your requisition. If you are already familiar with that process go directly to the path below to complete the remaining steps.
   Finance WorkCenter > ePro/PO > Manage Requisitions.

2. Once you see the requisition you are looking for in your search results, select Approvals from the Select Action menu.

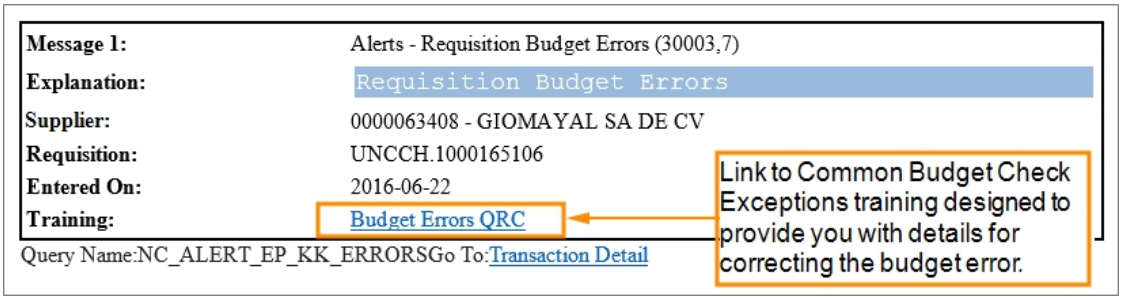
3. Click the **Go** button.

   Result: The system displays the Approval Status page.

4. Click the arrow to the left of Comments to view comments associated with the denial.



Budget Error Notification: If you create a requisition with budget errors, you receive an email alert. A sample of the email alert is below:



Seeing a Requisition's Life Cycle

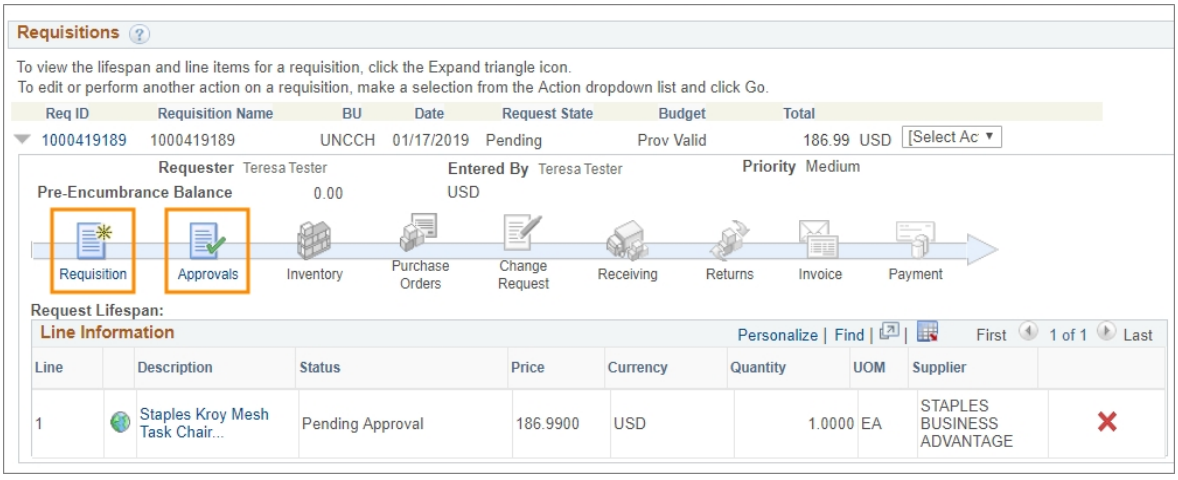
The requisition life cycle can be seen from the Manage Requisitions page. The life cycle provides information about each step a requisition goes through and where it currently is in the process. Follow the steps below to learn more about a requisitions life cycle.

1. Refer to *Finding a Requisition , page 40* for detailed information about finding your requisition. If you are already familiar with that process go directly to the path below to complete the remaining steps.
   Finance WorkCenter > ePro/PO > Manage Requisitions.

2. To see the life cycle of a particular requisition, click the arrow to the left of the requisition line.

Result: The system displays all steps associated with the requisition.

3. Click on any icon that is in color to view additional information about that step in the purchasing process.

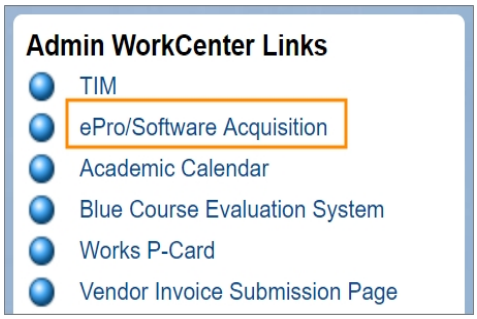


Note: As more information is added to the requisition, additional icons will be in color.

Accessing Your Recently Ordered Items

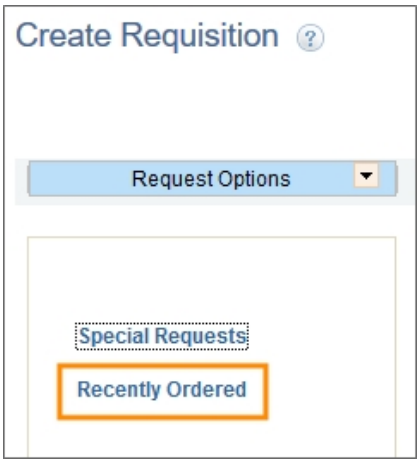
You can see recently ordered and approved items on the Recently Ordered page.

1. From the Admin WorkCenter homepage in ConnectCarolina select ePro/Software Acquisition from the Admin WorkCenter Links tile.



Result: The Create Requisition page opens with links to all of the supplier catalogs available to you.

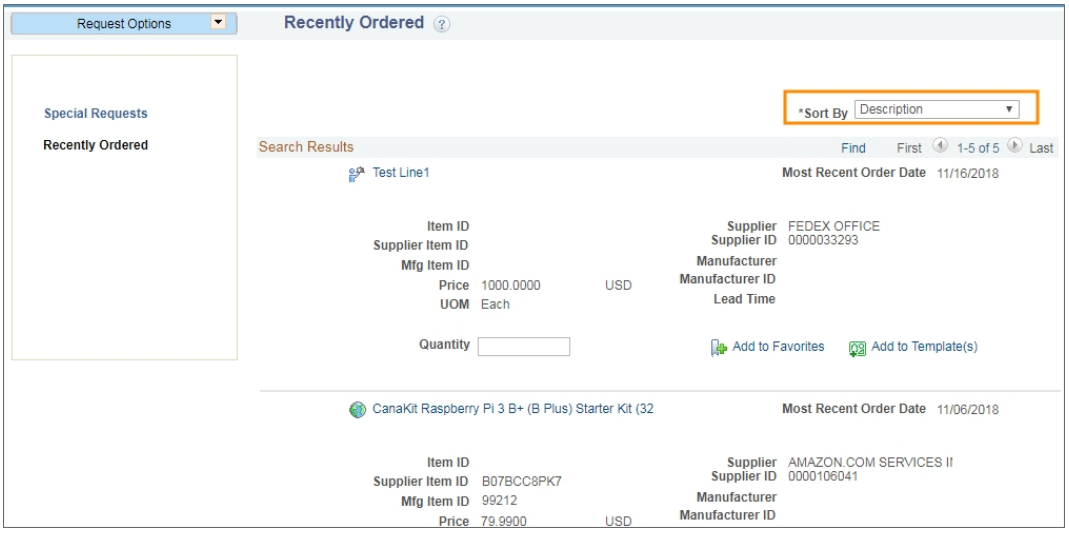
2. Click the **Recently Ordered** link.



Result: The Recently Ordered page will show as many as 50 of your most recently ordered items.

3. The items may span multiple pages. Be sure to click the advance arrow to see additional pages.

4. If you want to sort your recently ordered items, click the Sort By drop-down menu. You can sort by description, price, supplier name, and manufacturer name.



7 Handling Errors

In this chapter, you will learn how to:

- Find the purchase order (PO) number for a requisition and formatting it in a way suppliers can identify it.
- Cancel orders when possible.
- Return items when possible.

Finding and Formatting Your Purchase Order (PO) Number

Supplier Catalog orders are a type of requisition. After your departmental approver approves your order, a Purchase Order (PO) number is created.

Suppliers locate and track orders using Purchase Order numbers. Having this number included in correspondence to suppliers or on hand when calling them can speed up the process for you.

Be aware that all suppliers add UNCCH. to the beginning of our purchase order numbers to ensure their uniqueness. Therefore, adding UNCCH. to the full purchase order number - as illustrated below - when you communicate with suppliers allows them to find your order.

Purchase Order number in ConnectCarolina	7777777777
Purchase Order number on file with Suppliers	UNCCH.7777777777

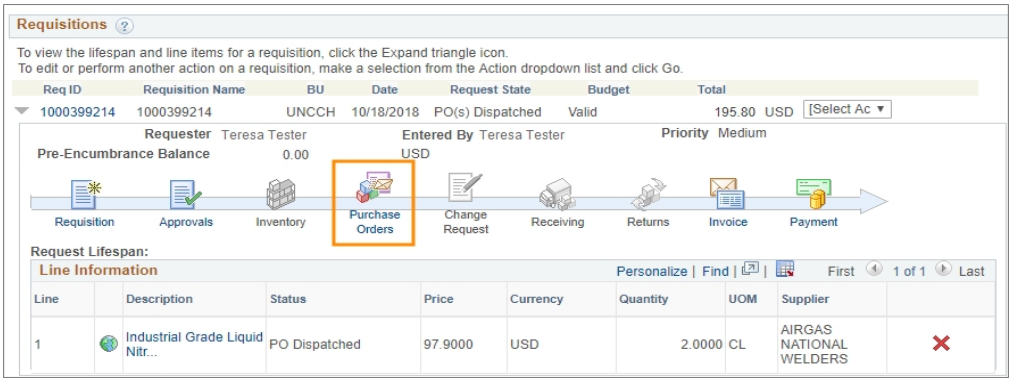
Follow the steps below to find the PO number for your order.

1. Refer to *Finding a Requisition , page 40* for detailed information about finding a requisition. If you are already familiar with that process go directly to the path below to locate your requisition and complete the remaining steps.
   Finance WorkCenter > ePro/PO > Manage Requisitions.

2. Once you have found the requisition, click the arrow to the left of the requisition line.

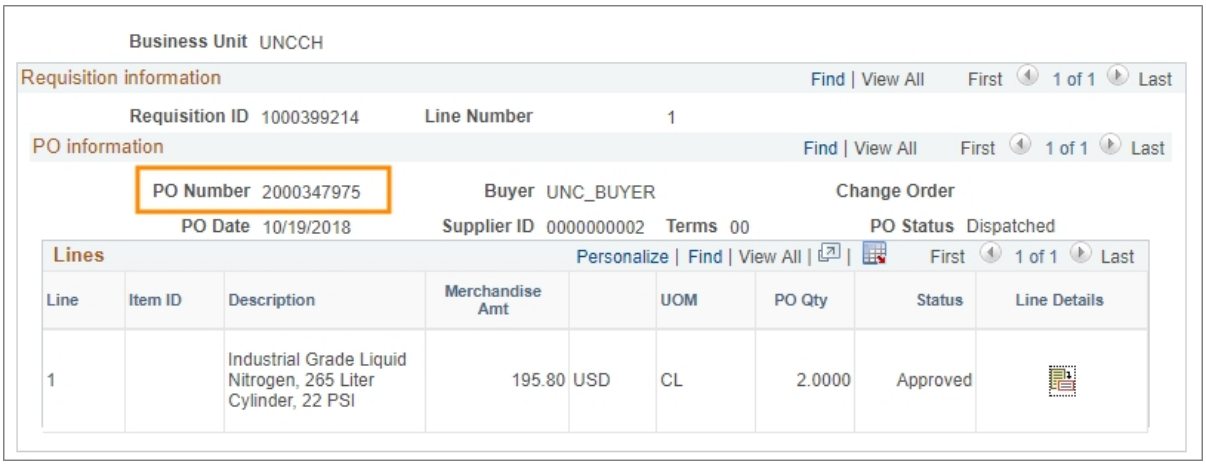
Result: The system displays all steps associated with the requisition.

3. Click on the **Purchase Orders** icon to view the PO number.



Note: The Purchase Orders icon will only be lit up if a Purchase Order has been created for the requisition.

Result: System displays a page with the PO Number and date.



Canceling a Supplier Catalog Order

ePro is an electronic business-to-business system. ePro Supplier Catalog orders are transmitted electronically every hour. If an ePro order has not already been processed by the supplier and you need to cancel, follow these steps.

1. Contact the supplier directly. For each supplier's contact information, refer to *Supplier Contacts for Cancellations and Returns, page 61*.

   Note: Having the Purchase Order (PO) number on hand will assist the supplier in locating your order and improve chances of successful cancellation. See *Finding and Formatting Your Purchase Order (PO) Number, page 50* for additional details about finding and properly formatting PO numbers.

2. Once you have received confirmation of the cancellation from the supplier, email the confirmation to Procurement at eprovendors@unc.edu.

   Result: Procurement Services manually relieves the encumbrance in ConnectCarolina.

Returning Items You Ordered from the Staples Supplier Catalog

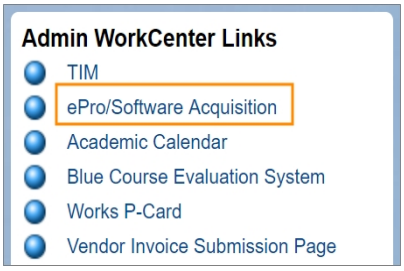
Staples allows you to return items in two ways; using ePro or contacting Staples directly.

To return items from Staples by contacting them directly, call them at 1-877-826-7755 or email them at support@staplesadvantage.com.

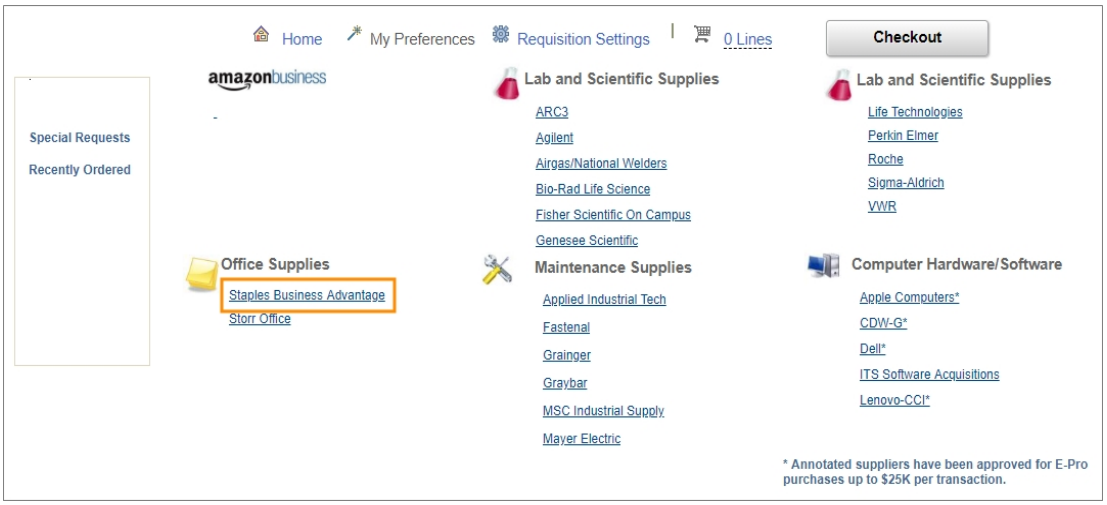
> **Note:** Have your purchase order number available and include it in any correspondence with suppliers. For information on finding and properly formatting Purchase Order (PO) numbers, refer to *Finding and Formatting Your Purchase Order (PO) Number, page 50.*

To return items from Staples through ePro, follow these steps:

1. From the Admin WorkCenter homepage in ConnectCarolina select ePro/Software Acquisition from the Admin WorkCenter Links tile.

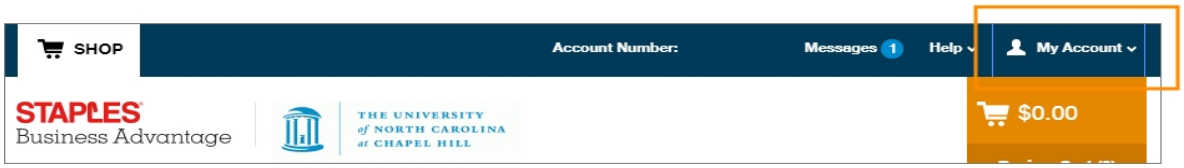


2. Click the Staples Business Advantage link.

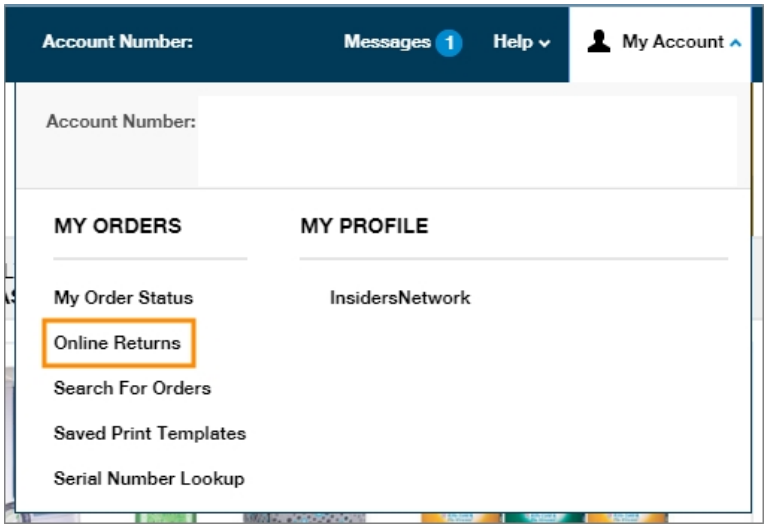


Result: The system shows the Staples catalog page. You remain within the UNC eProcurement supplier catalog process even when you are on a supplier website.

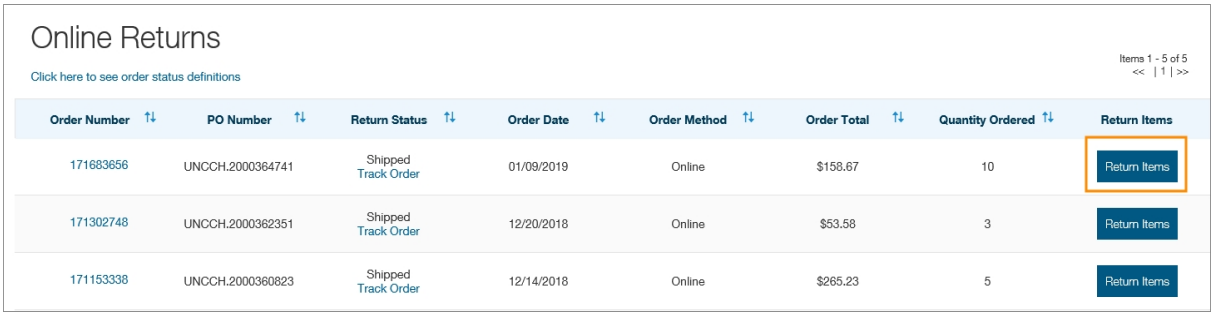
3. Click on the **My Account** button to expand options.



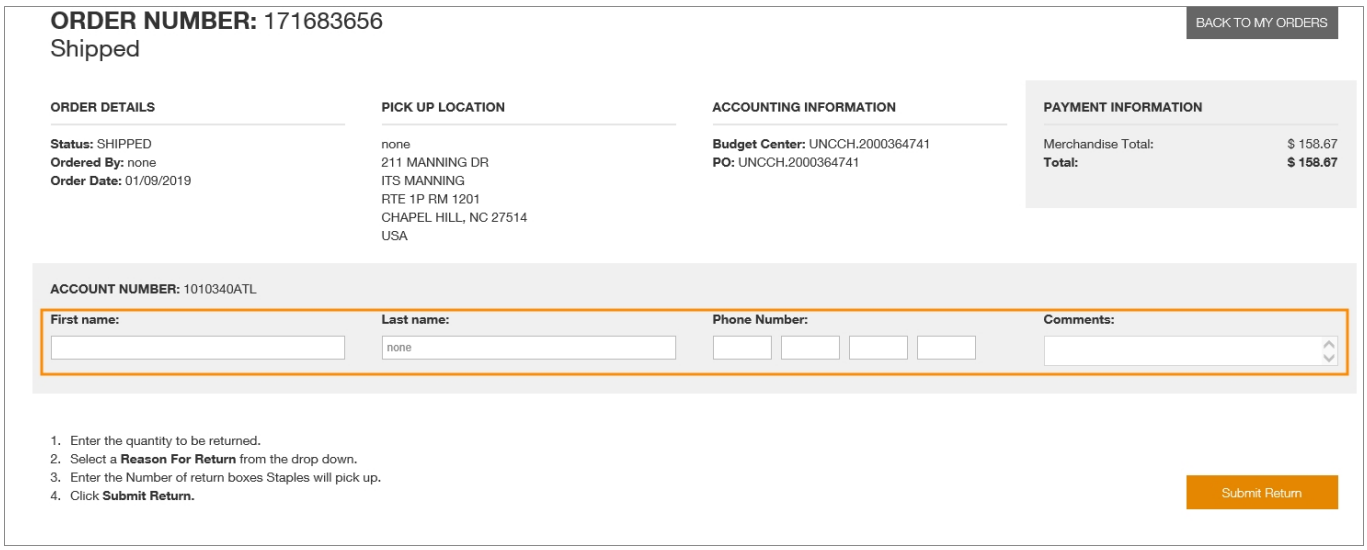
4. Click on the **Online Returns** link.



5. Click the **Return Items** button associated with the item you are returning.

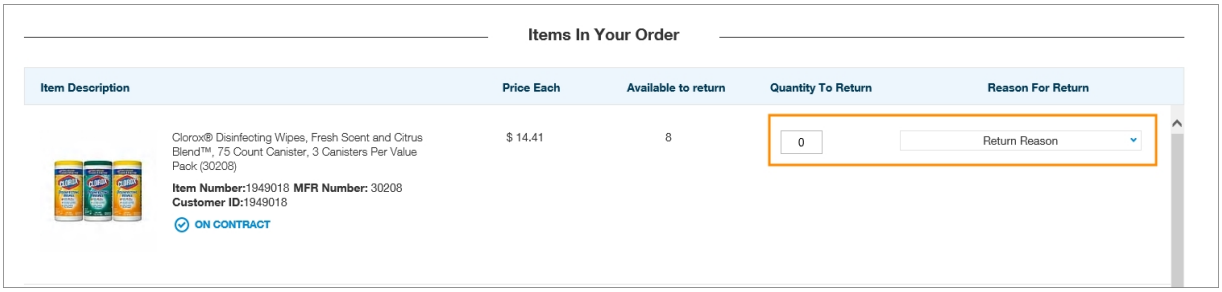


6. Enter the on-site contact information for the return. Enter any notes about the pick-up location or box location in the comments field.

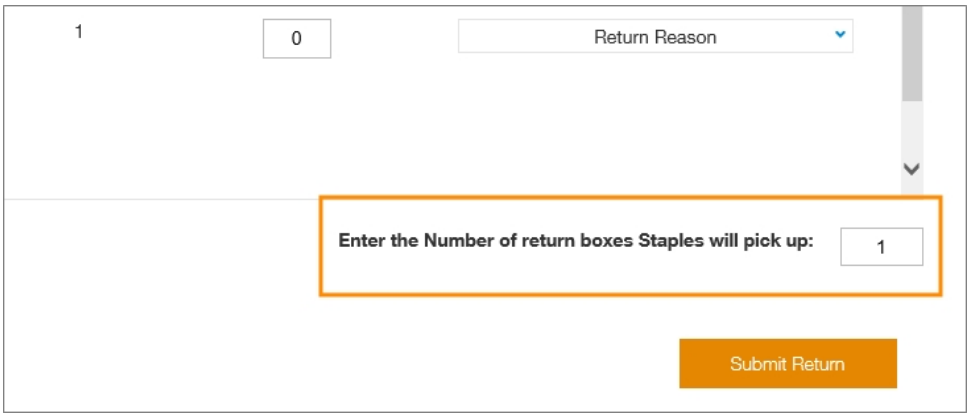


Result: Additional data entry options will become available.

7. Enter the **Quantity to Return** and select a **Reason For Return** from the drop-down menu.



8. Enter the number of boxes Staples should expect to pick up.

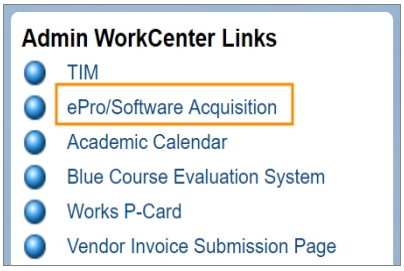


9. Click **Submit Return**.

Returning Items You Ordered from the Amazon Supplier Catalog

To return an item, you must be logged into Amazon Business through ConnectCarolina's Supplier Catalog.

1. From the Admin WorkCenter homepage in ConnectCarolina select ePro/Software Acquisition from the Admin WorkCenter Links tile.



2. Click the Amazon Business link.

   Result: The system shows the supplier's catalog page. You remain within the eProcurement supplier catalog process even when you are on a supplier website.

3. Once signed in, navigate to 'Your Orders' to view your complete order history.

   - Select Return or Replace items at right of product
   - Select reason for return
   - Print label and authorization
   - Prepare package and return label

   Items shipped and sold by Amazon.com can be returned within 30 days of receipt of shipment. If shipped and sold by a 3rd party, policies can vary. If you have questions you can contact Amazon Business customer service.

Returning Items You Ordered from a Supplier Catalog Other Than Staples or Amazon

If an ePro order that is not from Staples or Amazon is incorrect but has already been processed by the supplier, you will need to contact the supplier to request a Return Merchandise Authorization (RMA). To find the correct supplier contact, refer to *Supplier Contacts for Cancellations and Returns, page 61*.

The supplier will then process an electronic Credit Memo for the returned items.

> **Note:** Not all suppliers accept returns and not all products are returnable. Check with the supplier directly to determine if an item is returnable.
>
> **Note:** Before contacting the supplier, locate the Purchase Order (PO) number of the order you would like to return. Requisition IDs are internal to UNC and will not help the supplier locate your order. Suppliers can only identify your order with a purchase order number. See *Finding and Formatting Your Purchase Order (PO) Number, page 50* for more details on finding and properly formatting Purchase Order numbers.

Need to return an item to Staples? Refer to *Returning Items You Ordered from the Staples Supplier Catalog, page 53* for step-by-step instructions.

ePro Supplier Catalog Appendix

In the appendix, you find these helpful resources:

- Links to additional training and resources related to Supplier Catalog ordering.
- Cancellation contact for each ePro Supplier Catalog.
- Requester Preferences Field guide.

Additional Resources and Learning Opportunities

Chartfields

Chartfield Guide https://ccinfo.unc.edu/files/2014/05/Chartfield-QRC.pdf

Chartfield Checker https://ccinfo.unc.edu/featured-resources/chartfield-checker

Chartfields 101- Use your onyen and log in to access this self-paced course and get a complete overview of chartfield strings. - https://ccinfo.unc.edu/resource-docs/chartfields-101-understanding-connectcarolina-chartfields

General Purchasing Resources

Making Purchases page on CCINFO - https://ccinfo.unc.edu/making-purchases

Amazon

Amazon Business Ordering FAQs - https://finance.unc.edu/files/2019/01/UNC-Chapel-Hill-Amazon-Business-FAQ-Guide.pdf

Airgas and ARC3 Resources

Airgas Cylinder Purchase and Return - https://finance.unc.edu/files/2018/11/Airgas.pdf

ARC3 Cylinder Purchase and Return - https://finance.unc.edu/files/2018/11/ARC3.pdf

Supplier Contacts for Cancellations and Returns

Supplier	Cancellation Contact
AGILENT	b2b-afo-customer@agilent.com
AIRGAS	ANWMorrisvilleAdministration@airgas.com
APPLE	educationsupport@apple.com
APPLIED INDUSTRIAL	2281@applied.com
Arc3 Gases	Michael.banks@arc3gases.com
BIO-RAD	lsg_southeast@bio-rad.com
C D W	robert.chlupsa@cdwg.com
DELL	global_b2b_support@dell.com Sean_Lough@Dell.com
FASTENAL	ecommercesupport@fastenal.com
FISHER	CSO.UNC@thermofisher.com
GENESEE	support@geneseesci.com
GRAINGER	EproCustomerCare@grainger.com
GRAYBAR	edisupport@graybar.com eProCustomerService@graybar.com
I T S	sasupport@unc.edu
LENOVO	cruby@lenovo.com leckler@lenovo.com
LIFE TECHNOLOGIES	csecommerce@thermofisher.com
M S C	branchral@mscdirect.com
MAYER ELECTRIC	eproorders@mayerelectric.com
PERKIN ELMER	customercareus@perkinelmer.com
QIAGEN	customercare-us@qiagen.com
ROCHE	indianapolis.core_customer_service@roche.com david-j.smith@roche.com
SIGMA	custserv@sial.com
STAPLES	support@staplesadvantage.com
STORR	itrequest@storr.com
V W R	education@vwr.com

Requester Preferences Field Guide

Required Fields

In this field:	Do the following:
Location Set ID	Before entering any default information, enter either UNCCH or UNCGA in this field.
Ship To	Enter the ship to address or follow the steps below to search for the appropriate address: a. Click the **Lookup** (magnifying glass) icon. **Result:** The system displays the first 300 ship to addresses. b. In the Description field, change "begins with" to "contains." Type a word or two to describe your location and click **Look Up.** c. Click the link for the ship to address you need.
Location	Enter your location or follow the steps below to search for your location: a. Click the **Lookup** (magnifying glass) icon. **Result:** The system displays the first 300 addresses. b. In the Description field, change "begins with" to "contains." Type a word or two to describe your location and click **Look Up.** c. Click the link for the location you need.
Phone	Enter your phone number.
GL Unit	Look up, or enter, the business unit.
Dept	Look up, or enter, the department.

Optional Fields

In this field:	Do the following:
Fund	Look up, or enter, the fund code. A Fund chartfield is a single 5-digit code capturing both major fund group (first 3 digits) and purpose (final 2 digits).

In this field:	Do the following:
Source	Look up, or enter, the source. The Source is a 5-digit chartfield indicating the specific source that is supporting your transaction. **Note:** Fund and Source should be thought of as a pair. If a Source is entered with an incorrectly paired Fund in ConnectCarolina, the transaction will be flagged as a “combo edit” error.
Account	Leave this field blank. The account value defaults based on the category code chosen on the requisition, or from the supplier's website, though you can change it.
PC Business Unit	Look up, or enter, the PC business unit. **Notes:** Only enter this field if you also enter a default Project ID. For many contracts, grants and capital projects, this field is required. There are only two choices. • The CHOSR chartfield indicates the transaction falls into the activities of the Office of Sponsored Research (OSR). • The CHCIP chartfield indicates the transaction is a capital improvement project.
Project ID	Look up, or enter, the Project ID. **Note:** Project ID is the unique grant identifier. It is a 7-digit code that begins with a 5. For many contracts, grants and capital projects, this field is required.
Activity	Look up, or enter, the activity. **Note:** Only enter this field if you are also entering a Project ID. If used, this value will always be 1 unless it is for a capital project. For many contracts, grants and capital projects, this field is required.
Program	Look up, or enter, the program. **Note:** The Program chartfield is used by certain areas such as the College of Arts & Sciences and various professional schools to capture programmatic information.
Cost Code 1	Look up, or enter, cost code 1. **Note:** The optional Cost Code chartfields are available to assist schools and departments to capture financial information in the way it is useful to each department - usually for tracking and reporting.
Cost Code 2	Look up, or enter, cost code 2.
Cost Code 3	Look up, or enter, cost code 3.
Affiliation	Look up, or enter, the affiliation.
Fund Affiliation	Look up, or enter, the fund affiliation.