**Procurement Overview**

**What document should I complete to place an order?**

<table>
<thead>
<tr>
<th>Is the order greater than $5,000?</th>
<th>Does the vendor require a purchase order?</th>
<th>Is the vendor in the vendor catalog?</th>
<th>Order goods or services using a:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>---</td>
<td>Yes</td>
<td>ePro vendor catalog order*</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td>No</td>
<td>PCard</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Campus voucher</td>
</tr>
<tr>
<td>Yes</td>
<td>---</td>
<td>---</td>
<td>Purchase Requisition</td>
</tr>
</tbody>
</table>

*Goods only

**ePro Vendor Catalog Order Process Highlights**

**Departmental Requester**

1. From the ePro page, punches out to the vendor’s website.
2. Puts items in the shopping cart, submits them back to ePro.
3. If necessary, performs limited edits or adds order details.
4. Saves and submits the order.

**Departmental Approver**

- Reviews the order.
  - If the order is approved, the systems sends the order to the vendor.
  - If the order is denied, the system sends the order back to the Departmental Requester.

**Vendor**

- Receives and fulfills the order.
Purchase Requisition Process Highlights

**Departmental Requester**
- If > $5,000, contacts the appropriate purchasing agent to receive guidance and manage costs. Go to finance.unc.edu and search for *Purchasing Category Managers* to find your purchasing agent.
- Creates a requisition and submits it for approval.

**Purchasing Agent**
- Based on the items requested and purchasing rules, does one of the following:
  - Creates a purchase order (PO) which references a State/UTC contract
  - Creates a PO which references the purchase requisition
  - Sends a noncompetitive bid to a vendor, enters the response, and sends the PO to the vendor
  - Creates a competitive bid document, evaluates responses, and awards the order to the winning vendor

**Departmental Approver**
- Reviews the requisition.
  - If the requisition is approved, the system sends the requisition to the purchasing agent.
  - If the requisition is denied, it’s sent back to the Departmental Requester.

**Vendor**
- Receives and fulfills the order.

**Departmental Requester**
- Creates a receipt for goods sent to the department.

**Purchasing Director**
- Reviews the purchase order.

**Central Receiving**
- Creates a receipt for goods sent to the warehouse.

**Inspector or Buyer**
- Inspects goods, if inspection is required, and records results.