ConnectCAROLINA

ePro Vendor Catalog Helpful Tips

Default Chartfield String

When you first started using the ePro Vendor Catalog, the system required you to set up your requester defaults, including your default chartfield values. You were required to enter a business unit and a department number, but you could also add additional chartfield defaults. You can change those defaults at any time.

1. Navigate to the Main Menu > Finance Menu > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup
2. Click on the **Find an Existing Value** tab.
3. Enter your ONYEN in the Requester field and then click the **Search** button.
4. Modify your existing defaults.

   Note: GL Business Unit and department are required. The other chartfields are optional.
5. Click the **Save** button.

Prices Are Only Good for 30 Days

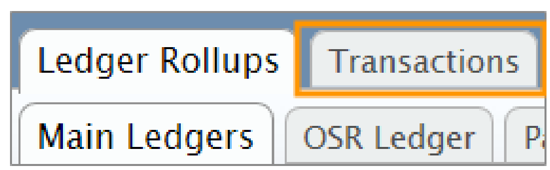
Prices for the items you select from the vendor catalog are only good for 30 days. This means that the requisition that is created must be processed into a Purchase Order in that time. If you select items from the catalog, but don't submit the requisition in a timely manner, the Purchase Requisition will automatically be canceled after 30 days!

How to Find Your Orders in InfoPorte

You can view your ePro orders in InfoPorte by following the steps below:

1. Navigate to infoporte.unc.edu and log in with your ONYEN.
2. Click the **Finance** button.

3. Click the **Transactions** tab.



4. Enter the appropriate Accounting Period (Acct Prd) and Chartfield values.
5. Click the **Search** button.

You Can Call Any Vendor with Questions

If you have questions about items in the vendor catalog or your order, you can contact the vendor's sales representative directly. You can find the vendor's contact on their website. Click on the **Help**, **Customer Service**, or **Support** link.

Returning Items

ePro is an electronic business-to-business system. What that means is that the orders are transmitted electronically every hour. Once the order is processed in a vendor's system, it cannot be cancelled out of ConnectCarolina. Please ensure that you have the item you need prior to submitting the order. If you discover that the item is not the correct item, you will need to call the vendor and request a "Return Merchandise Authorization (RMA)."

NOTE: You will need to provide the vendor the purchase order number; vendors do not know anything about purchase requisitions. The vendor will then process an electronic Credit Memo for the returned items.

Exception: Staples does not use RMAs. Staples can process returns two ways:

- Log into Staples within ConnectCarolina. Click on My Orders and then **On-Line Return.**
- Call Staples with the Purchase Order number.

To see your Purchase Order number:

1. Navigate to Main Menu > Finance Menu > eProcurement > Manage Requisitions.
2. Enter the appropriate search criteria to find your order and click the Search button.
3. Click the Expand button by your order.

4. Click on the Purchase Orders icon to view the Purchase Order number.

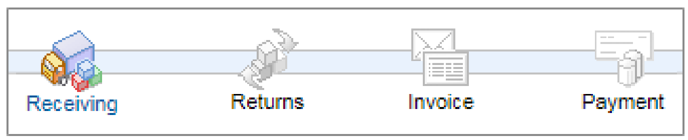
Note: The Purchase Orders icon will only be lit up if a Purchase Order has been created.

Review Your ePro Orders, Including Their Related POs, Receiving Status, and Vendor Payment Information

The Manage Requisitions screen allows you to view the life cycle of all your purchases through the ePro Vendor Catalog. Follow the steps below to check information about your order:

1. Navigate to Main Menu > Finance Menu > eProcurement > Manage Requisitions.
2. Enter the appropriate search criteria to find your order and click the Search button.
3. Click the Expand button by your order.

4. Click any highlighted item to review the relevant information.



Note: If an item isn't highlighted, there are no items to see. In the example above, you have processed some Receipts for this order, so the delivery truck icon is lit up. However, there are no invoices or scheduled payments in the system.