ePro Supplier Catalog Essentials

Understanding, creating, editing, and placing orders.

VERSION: February 2019
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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. Supplier catalog orders may not exceed $5,000.00.

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.
2 Requester Preferences

Working With Your Requester Preferences

Before a Departmental ePro purchasers can access supplier catalogs, Requestor Preferences must be entered for required fields. Requestor 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

Follow these steps to see, set up, or change your requester preferences:

1. Choose this menu option:

   Main Menu > Finance Menu > Set Up Financials / Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup

2. Do one of the following:

   • In the Requester field, enter your UNC Onyen.

   • In the Description field, enter your first and last name.

3. Click the Search button.

   Result: The system displays the Requester Setup page.

   ![Requester Setup Form](image)

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

---

### Requester Setup

![Requester Setup Diagram](image)

These two boxes typically contain the same code. Both are required.

### ChartFields

![ChartFields Diagram](image)

- **GL Unit**: UNCGH
- **Fund**: [Select]
- **Source**: [Select]
- **Account**: [Select]
- **Dept**: [Select]
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.

5. 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.

<table>
<thead>
<tr>
<th>In this optional field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund</td>
<td>Look up, or enter, the Fund chartfield.</td>
</tr>
<tr>
<td></td>
<td>A Fund chartfield is a single 5-digit code capturing both major fund group (first 3 digits) and purpose (final 2 digits).</td>
</tr>
<tr>
<td>Source</td>
<td>Look up, or enter, the Source. The Source is a 5-digit chartfield indicating the specific Source that is supporting your transaction.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Account</td>
<td>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.</td>
</tr>
<tr>
<td>Project ID</td>
<td>Look up, or enter, the Project ID.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Activity</td>
<td>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.</td>
</tr>
<tr>
<td>PC Business Unit</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>• The CHOSR chartfield indicates the transaction falls into the activities of the Office of Sponsored Research (OSR).</td>
</tr>
<tr>
<td></td>
<td>• The CHCIP chartfield indicates the transaction is a capital improvement project.</td>
</tr>
<tr>
<td>In this optional field:</td>
<td>Do the following:</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------</td>
</tr>
</tbody>
</table>
| 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. |

6. 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 or repairs from any supplier listed in the supplier catalog when the total does not exceed $5,000.00. These suppliers extend special pricing and offers to UNC-Chapel Hill.

If you need to make a purchase from a supplier listed in the catalog for an amount that exceeds $5,000.00, 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. In ConnectCarolina, click the Finance button located in the left-hand navigation.

Result: The Finance menu expands.

2. Click the ePro Supplier Catalog link.
3. 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.

4. Select one or more products from the supplier's catalog to order.
5. 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 **Checkout - Review and Submit** page 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 your 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:

   • Name Your Supplier Catalog Order, page 22
   • Deleting Lines from Your Supplier Catalog Order, page 23
   • Adding, Seeing, and Deleting Attachments From Your Supplier Catalog Order or Purchase Requisition, page 26
   • Changing the Information That is Filled in Automatically for Each of Your Orders Based on Your Requester Preferences, page 37
   • Split the Funding on One Line of Your Order, page 34
   • Mass Change: Changing the Shipping Instructions or the Chartfield Values for an Entire Requisition, page 40

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.

5. 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 51* 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.
Name 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 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.

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Name</td>
<td>Enter a name to help you identify the supplier catalog requisition later.</td>
</tr>
<tr>
<td></td>
<td>Consider following a consistent naming convention to assist you in searching and</td>
</tr>
<tr>
<td></td>
<td>identifying orders more quickly.</td>
</tr>
</tbody>
</table>

2. Refer to Finalizing Your Order on the Checkout - Review and Submit Page, page 17 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.

   ![Delete Confirmation](image)

   **Delete Confirmation**
   
   Delete current/selected rows from this page? The delete will occur when the transaction is saved.

   - [ ] **OK**
   - **Cancel**

   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 17* for information about completing your order or for a list of additional edits you can make to it.
Enter 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.

   ![Attachments and Comments](image)

   Result: The system displays the Header Comments page.

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

   ![Header Comments](image)

   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.

2. 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.
<table>
<thead>
<tr>
<th>In this field</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to Supplier</td>
<td>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.</td>
</tr>
<tr>
<td>Show at Receipt</td>
<td>Mark this checkbox if you want the comment to appear on the receipt documentation.</td>
</tr>
<tr>
<td>Show at Voucher</td>
<td>Mark this checkbox if you want the comment to appear on the voucher.</td>
</tr>
</tbody>
</table>

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

4. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 17* 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.

2. Click the Add Attachments button.

   ![Header Comments](image)

   Result: The system displays the File Attachment box.

3. Click the Browse... button.
4. 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.

5. Click the **Upload** button.

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

6. Check **Send to Supplier**, so that the supplier will be able to see the attachment.
7. 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 17 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 17 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 17* 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.
Split 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.

   ![Cart Summary: Total Amount 51.90 USD](image)
   
   **Result:** The system displays additional details, including Accounting Lines.

2. Click the **plus** icon as many times as needed to split charge appropriately.

   ![Cart Summary: Total Amount 51.90 USD](image)
   
   **Result:** The system displays additional accounting lines.

3. Complete the fields, if necessary:
<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribute By</td>
<td>Choose the distribution option you want:</td>
</tr>
<tr>
<td></td>
<td>- Select <strong>Quantity</strong> if you want to split the cost by quantity.</td>
</tr>
<tr>
<td></td>
<td>- Select <strong>Amt</strong> if you want to split the cost by amount.</td>
</tr>
<tr>
<td>Liquidate By</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Quantity</strong> if you want to liquidate by quantity.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Amt</strong> if you want to liquidate by amount.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Location</td>
<td>Location is filled in by default on supplier catalog orders based on the supplier.</td>
</tr>
<tr>
<td></td>
<td>For purchases not through the supplier catalog, enter the location you are ordering from. Many suppliers have multiple locations and getting the right one is important. Selecting the incorrect location can delay the purchasing process.</td>
</tr>
<tr>
<td>Quantity</td>
<td>If you chose to distribute by <strong>Quantity</strong>, enter the quantity for each line. If you chose to distribute by <strong>Amt</strong>, the system doesn't display this box.</td>
</tr>
<tr>
<td>Percent</td>
<td>If you chose to distribute by <strong>Amt</strong>, enter the percentage to assign to each line. If you chose to distribute by <strong>Quantity</strong>, leave this field blank.</td>
</tr>
</tbody>
</table>

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

4. To enter chartfield strings, click the **Chartfields** tab. You can change chartfield strings for both 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 17* 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:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>This field is not used for supplier catalog orders at UNC-Chapel Hill.</td>
</tr>
<tr>
<td>Ship To</td>
<td>Enter the Ship To location or follow the steps below to search for the appropriate Ship To location:</td>
</tr>
<tr>
<td></td>
<td>a. Click the <strong>Look up</strong> (magnifying glass) icon.</td>
</tr>
<tr>
<td></td>
<td>Result: The system displays the first 300 Ship To addresses.</td>
</tr>
<tr>
<td></td>
<td>b. In the Description field, change “begins with” to “contains”. Type a word or two to describe your location and click <strong>Look Up</strong>.</td>
</tr>
<tr>
<td></td>
<td>c. Click the link for the Ship To location you need.</td>
</tr>
<tr>
<td></td>
<td>Result: The system will send this line to the selected location.</td>
</tr>
</tbody>
</table>
### 5 Funding and Shipping Changes to an Order

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attention</td>
<td>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.</td>
</tr>
<tr>
<td>Location</td>
<td>Enter the location you are ordering from. Location is filled in by default for supplier catalog orders.</td>
</tr>
<tr>
<td>Quantity</td>
<td>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.</td>
</tr>
</tbody>
</table>

![Cart Summary: Total Amount 51.90 USD](image)

**Cart Summary: Total Amount 51.90 USD**

Expand lines to review shipping and accounting details

**Requisition Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Staples Notebooks, 8.5 x 11.75</td>
<td>LLSTBUSSADV</td>
<td>10,000</td>
<td>Dozen</td>
<td>5.1900</td>
<td>51.90</td>
<td></td>
</tr>
</tbody>
</table>

**Shipping Line**

- **Ship To:**
- **Address:**
- **Attention To:**
- **Due Date:**

**Comments & Attachments**

**Quantity**

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000</td>
<td>5.1900</td>
</tr>
</tbody>
</table>

**Price Adjustment**

- Pegging Inquiry
- Pegging Workbench

**Acct. Number**

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

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

![Chartfields2](image)
3. 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.

4. 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.

5. Refer to Finalizing Your Order on the Checkout - Review and Submit Page, page 17 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.

   ![Requisition Lines Table]

   Result: All Requisition Lines have checked checkboxes.

   2. Click the Mass Change button.

   ![Requisition Lines Table after Mass Change]

   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:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Distribution Lines</td>
<td>Mark this checkbox to apply changes to all distribution lines.</td>
</tr>
<tr>
<td>Matching Distribution Lines</td>
<td>Mark this checkbox to apply changes to each existing distribution line by matching the distribution line numbers.</td>
</tr>
<tr>
<td>Replace Distribution Lines</td>
<td>Mark this checkbox to remove the existing distribution lines and replace them with distribution line changes.</td>
</tr>
</tbody>
</table>
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 17* for information about completing your order or for a list of additional edits you can make to it.
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. Choose this menu option:

Main Menu > Finance Menu > eProcurement > Manage Requisitions

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

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do one or more of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>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.</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>If the requisition was given a name, enter the name of the requisition you are searching for.</td>
</tr>
<tr>
<td>Requisition ID</td>
<td>If you know it, enter the requisition ID of the document you are searching for.</td>
</tr>
<tr>
<td>Request Status</td>
<td>If you want to see all of the requisitions with a certain status, such as pending, select that status from the drop-down list.</td>
</tr>
<tr>
<td>Date From</td>
<td>Use the Date From field to search for requisitions created beginning with a specific date.</td>
</tr>
<tr>
<td>Date To</td>
<td>Use the Date To field to search for requisitions created before a specific date.</td>
</tr>
<tr>
<td>Requester</td>
<td>Enter the Onyen, also known as the Requester ID, of the person listed as the requester on the requisition you are searching for.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The requester is the department contact for the requisition.</td>
</tr>
<tr>
<td>Entered By</td>
<td>Enter the Onyen of the person who entered the requisition you are searching for.</td>
</tr>
<tr>
<td>PO ID</td>
<td>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.</td>
</tr>
</tbody>
</table>

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 44 for detailed information about finding your requisition.

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

   Result: The Select Action menu expands.

3. Click the View Print button.

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

4. Click the Go button.

5. 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.

6. 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.

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

5. 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 Seeing the Reason a Requisition was Denied, page 48 for detailed information about finding your requisition.

2. Once you find the denied requisition, click the Select Action drop-down.

Result: The Select Action menu expands.

3. Click the Approvals link from the Select Action menu.

4. Click the Go button.

Result: The system displays the Approval Status page.
5. Click the arrow to the left of Comments to view comments associated with the denial.

![Image]

**Budget Error Notification**

If you create a requisition with budget errors, you receive an email alert.

A sample of the email alert is below:

![Message]

Link to Common Budget Check Exceptions training designed to provide you with details for correcting the budget error.
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 44 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.
   Main Menu > Finance Menu > eProcurement > Manage Requisitions.

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

   ![Requisitions Table]

   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.

   ![Requisitions Life Cycle]

   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. In ConnectCarolina, click the Finance button located in the left-hand navigation.

Result: The Finance menu expands.

2. Select the ePro Supplier Catalog link.

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.

<table>
<thead>
<tr>
<th>Purchase Order number in ConnectCarolina</th>
<th>7777777777</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order number on file with Suppliers</td>
<td>UNCCH.7777777777</td>
</tr>
</tbody>
</table>

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

1. Refer to *Finding a Requisition*, page 44 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.
   **Main Menu > Finance Menu > eProcurement > Manage Requisitions.**

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

   ![Requisitions](image)

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

3. 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 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 65.*

   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 54* 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](mailto:eprovendors@unc.edu).

   Result: Procurement Services manually relieves the encumbrance in ConnectCarolina.
Returning Items You Ordered from Staples

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 54.

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

1. In ConnectCarolina, click the Finance button located in the left-hand navigation.

   Result: The Finance menu expands.

2. Click the ePro Supplier Catalog link.

3. Click the Staples Business Advantage link.
4. Click on the **My Account** button to expand options.

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

6. Click the **Return Items** button associated with the item you are returning.
7. 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.

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

9. Enter the number of boxes Staples should expect to pick up.
10. Click **Submit Return**.
Returning Items You Ordered from a Supplier Catalog Other Than Staples

If an ePro order that is not from Staples 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 65.

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 54 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 Staples, page 57 for step-by-step instructions.
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.
- Annotated look at the Checkout - Review and Submit Page.
Additional Resources and Learning Opportunities

Chartfields

Chartfield Guide [https://ccinfo.unc.edu/files/2014/05/Chartfield-QRC.pdf](https://ccinfo.unc.edu/files/2014/05/Chartfield-QRC.pdf)
Chartfield Checker [https://ccinfo.unc.edu/featured-resources/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](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](https://ccinfo.unc.edu/making-purchases)

Airgas and ARC3 Resources

# Supplier Contacts for Cancellations and Returns

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Cancellation Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGILENT</td>
<td><a href="mailto:b2b-afo-customer@agilent.com">b2b-afo-customer@agilent.com</a></td>
</tr>
<tr>
<td>AIRGAS</td>
<td><a href="mailto:ANWMorrisvilleAdministration@airgas.com">ANWMorrisvilleAdministration@airgas.com</a></td>
</tr>
<tr>
<td>APPLE</td>
<td><a href="mailto:SSOHiedOrderSupport@apple.com">SSOHiedOrderSupport@apple.com</a></td>
</tr>
<tr>
<td>APPLIED INDUSTRIAL</td>
<td><a href="mailto:2281@applied.com">2281@applied.com</a></td>
</tr>
<tr>
<td>Arc3 Gases</td>
<td><a href="mailto:Michael.banks@arc3gases.com">Michael.banks@arc3gases.com</a></td>
</tr>
<tr>
<td>BIO-RAD</td>
<td><a href="mailto:lsg_southeast@bio-rad.com">lsg_southeast@bio-rad.com</a></td>
</tr>
<tr>
<td>C D W</td>
<td><a href="mailto:robert.chlupsa@cdwg.com">robert.chlupsa@cdwg.com</a></td>
</tr>
<tr>
<td>DELL</td>
<td><a href="mailto:global_b2b_support@dell.com">global_b2b_support@dell.com</a></td>
</tr>
<tr>
<td>FASTENAL</td>
<td><a href="mailto:ecommercesupport@fastenal.com">ecommercesupport@fastenal.com</a></td>
</tr>
<tr>
<td>FISHER</td>
<td><a href="mailto:CSO.UNC@thermofisher.com">CSO.UNC@thermofisher.com</a></td>
</tr>
<tr>
<td>GENESEE</td>
<td><a href="mailto:support@geneseesci.com">support@geneseesci.com</a></td>
</tr>
<tr>
<td>GRAINGER</td>
<td><a href="mailto:EproCustomerCare@grainger.com">EproCustomerCare@grainger.com</a></td>
</tr>
<tr>
<td>GRAYBAR</td>
<td><a href="mailto:edisupport@graybar.com">edisupport@graybar.com</a></td>
</tr>
<tr>
<td>I T S</td>
<td><a href="mailto:sasupport@unc.edu">sasupport@unc.edu</a></td>
</tr>
<tr>
<td>LENOVO</td>
<td><a href="mailto:cruby@lenovo.com">cruby@lenovo.com</a></td>
</tr>
<tr>
<td>LIFE TECHNOLOGIES</td>
<td><a href="mailto:csecommerce@thermofisher.com">csecommerce@thermofisher.com</a></td>
</tr>
<tr>
<td>M S C</td>
<td><a href="mailto:branchral@mscdirect.com">branchral@mscdirect.com</a></td>
</tr>
<tr>
<td>MAYER ELECTRIC</td>
<td><a href="mailto:eproorders@mayerelectric.com">eproorders@mayerelectric.com</a></td>
</tr>
<tr>
<td>PERKIN ELMER</td>
<td><a href="mailto:customercareus@perkinelmer.com">customercareus@perkinelmer.com</a></td>
</tr>
<tr>
<td>QIAGEN</td>
<td><a href="mailto:customercare-us@qiagen.com">customercare-us@qiagen.com</a></td>
</tr>
<tr>
<td>ROCHE</td>
<td><a href="mailto:indianapolis.core_customer_service@roche.com">indianapolis.core_customer_service@roche.com</a></td>
</tr>
<tr>
<td>SIGMA</td>
<td><a href="mailto:custserv@sial.com">custserv@sial.com</a></td>
</tr>
<tr>
<td>STAPLES</td>
<td><a href="mailto:support@staplesadvantage.com">support@staplesadvantage.com</a></td>
</tr>
<tr>
<td>STORR</td>
<td><a href="mailto:itrequest@storr.com">itrequest@storr.com</a></td>
</tr>
<tr>
<td>V W R</td>
<td><a href="mailto:education@vwr.com">education@vwr.com</a></td>
</tr>
</tbody>
</table>
Requester Preferences Field Guide

Required Fields

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Do the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Set ID</td>
<td>Before entering any default information, enter either UNCCH or UNCGA in this field.</td>
</tr>
</tbody>
</table>
| 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

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

Enter header comments or add attachments to the entire order here.

Add More Items takes you back to the Create Requisition page and allows you to select the supplier catalog again. Submitting an additional order through the supplier’s site adds lines to the Checkout - Review and Submit page, but does not delete existing items.

Click the expand arrow to reveal details for a single requisition line.

Clicking Pre-Check Budget checks for sufficient balance and combo code errors. This step must be completed before Save & submit becomes clickable.

Clicking the Save & submit button is the final step of order submission. This button sends orders to departmental approvers, if any, and then directly to the supplier for fulfillment.

Save for Later allows you to save a supplier catalog order without submitting so that you can return to your requisition later.

Make sure to check Send to Supplier.

Use Mass Change to modify shipping and chartfield information for all requisition lines you have selected - as indicated by a checked checkbox.

Click to delete a line.