

1 Providing Adequate Information on Requisitions

Include as much information as possible on your requisitions to help the buyers process them efficiently. Be sure to attach any of the following if they apply: Misuse Statement, Statement of Work, Waiver of Competition, Signed Maintenance Agreement, Quote or Sole Source Justification. Also:

- When you are renewing equipment maintenance with a supplier, be sure to provide details such as the supplier quote number and terms. Include serial and model numbers.
- When you make a purchase on a state contract, be sure to attach all required documentation (even though the system lets you submit the requisition without the attachments).
- If you need to enter special delivery instruction or specific due dates, enter them in the Header Comments field and mark the Send to Supplier box. Entering comments is the only way suppliers receive this important information.

2 Checking the Budget on Requisitions

You need to Pre-Check the budget on the requisition and resolve any budget errors (so that the budget status is “Provisionally Valid”) before you can save and submit a purchase requisition. Your approvers can’t approve a purchase requisitions that has budget errors. If there are budget exceptions, contact your department’s budget personnel for resolution.

3 Choosing the Supplier Location on Requisitions

Be sure to choose the right supplier address on the requisition—the address matters. If a specific supplier address you need is not available, use Campus Supplier to request that the order-from address be added to the supplier.

4 Choosing the Ship-to Location on Requisitions

Be sure to choose the accurate eProcurement ship-to location. If not available or inaccurate, submit a ticket to Help Desk to have a new one created. Include the address, building and room number (required).

5 Researching Your Requisition

To see the status of your purchase requisition, to look up the purchase order number, or to see payment vouchers against the purchase order, follow these steps:

1. From the Admin WorkCenter home page, choose Finance WorkCenter > ePro/PO > Manage Requisitions
2. **Then find the requisition you need, and click on** the gray arrow to the left of the requisition ID to expand and view details.
3. If you need to contact the supplier catalog supplier about an order you must provide the purchase order number. Suppliers do not know anything about the purchase requisition.

6 Canceling a Requisition Before the Purchase Order

If your department no longer wants a purchase requisition to be processed, you can cancel it any time before the purchase order is created. Canceling the purchase request liquidates the pre-encumbrance on your department's bunds. If the requisition has been approved, be sure to also contact the buyer. To cancel a requisition, use this menu option: **Finance WorkCenter > ePRO/PO > Manage Requisitions**. Once you find the requisition you need to cancel, in the Select Actions field choose Cancel Requisition, click Go, then click the Cancel Requisition button.

7 Canceling Supplier Catalog Orders

1. Call the Supplier immediately and cancel the purchase order!
Note: Make sure to give them the purchase order number, suppliers don't know anything about purchase requisitions.
2. Create a Remedy ticket requesting the specific purchase order be canceled. If the order is not canceled out of ConnectCarolina the encumbrance will not be liquidated in a timely manner.

8 Submitting Change Orders for Purchase Orders

When doing a change order, it's important to only add the additional monies required and note indicating which line the monies should be applied against. For example, if a purchase order has two lines and you need to add \$5,000.00 to line 2 note in the description that the monies need to be added to line 2 on the purchase order. Be sure that the purchase order number is included so the buyers knows you are trying to update an existing order, not create a new one. This will ensure that the purchase order, the invoice, and the receipt continue to match up and that payment can be applied correctly.

9 Being Asked to Receive by Quantity When by Amount is Correct

If you need to enter a receipt for a line that requires you to enter by quantity and this doesn't seem right to you, please send an email to frs_receiving@unc.edu that contains the purchase order number, your contact name, and your phone number. A purchasing agent will contact you to assist.

10 Receiving Against Legacy "W" or "P" Purchase Orders

When receiving for W or P purchase orders that were transferred from FRS to ConnectCarolina:

1. Ensure that all scans are fully readable—be sure to check your files for readability before sending.
2. If multiple invoices need receiving for the same PO, please include an Excel spreadsheet, Word document or a screenshot of the Connect Carolina Purchase Order page showing the total quantity or amount to receive per line. Include the PO number, PO line number, and amount or quantity to receive.
3. Send each request for receiving in a separate email. Send only one receiving request per email and in the subject line, type the buyer's last name (you can find the buyer's name on the purchase order) and the purchase order number involved (for example, "Sillman for W100100").