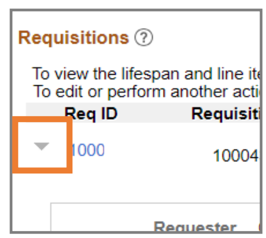
Purchasing & Receiving Useful Info

Useful Inquiries

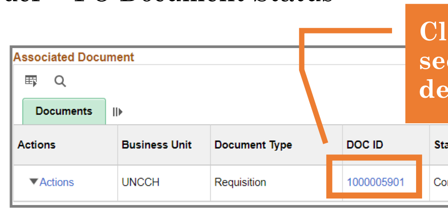
<table>
<tr><th>This inquiry...</th><th>Is best for...</th><th>And to get there...</th></tr>
<tr><td>Manage Requisitions - Requisition Lifecycle</td><td>

Has my requisition been approved?
Which approver has my req?
What's the PO number for my req?
What receipts have been entered and has it been fully received?
How can I see if vouchers have been created for my invoices?
Has it been paid and if so, what's the check number?
</td><td>
Finance WorkCenter > BuyCarolina/Purchase Order > Manage Requisitions

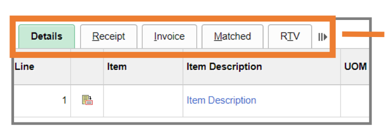
Find the requisition you need, and click the gray arrow to the left of the requisition ID:


</td></tr>
<tr><td>Requisition Inquiry</td><td>

I don't know the req number, but I know the supplier, department, or item description
I want to see the related PO, vouchers, and payments for a requisition all on one page
</td><td>Finance WorkCenter > BuyCarolina/Purchase Order > Requisition</td></tr>
<tr><td rowspan="2">PO Inquiry</td><td>

What part of my PO has been paid?
</td><td>
Finance WorkCenter > BuyCarolina/Purchase Order > PO Document Status


Click the link to see payment details.
</td></tr>
<tr><td>

What part of my PO has been received?
What part of my PO has been invoiced?
What part of my PO has been matched?
</td><td>
Finance WorkCenter > BuyCarolina/Purchase Order > Activity Summary


Click these tabs to see receipt, invoice, and matching details.
</td></tr>
<tr><td>Voucher Inquiry</td><td>

For this supplier I want to see all vouchers that are scheduled to pay, paid, and not paid
I know the PO number—show me the vouchers
I know the invoice number—show me the vouchers
</td><td>Finance WorkCenter > Accounts Payable > Voucher Inquiry</td></tr>
</table>

This inquiry...	Is best for...	And to get there...
Payment Inquiry	• What payments have we made to this supplier? • When did we last pay them?	Finance WorkCenter > Accounts Payable > Payment Inquiry

Things to Remember

Set Requester First
If you enter a purchase req for someone else, be sure to set the requester first thing (BEFORE starting your purchase order or going to the special items link). Entering the requester means both you and the requester can enter receipts for the purchase, but once you save (including when you pre-budget check), you can no longer change the requester. So try to get in the habit of changing the requester as soon as you start the req.

Attach a Quote
All purchase requisitions must have at least one quote as an attachment. The only exception here is for contracts that are for review only; in this instance you would attach the contract.

Enter a Requisition Name
Be sure to enter an actual name in the Requisition Name field. In general, it should be five words or less. Do not leave this field blank. If a PR is of urgency, it should be noted in the Requisition Name field as well.

Pre-Budget Check Required
Pre-budget checking is now required on requisitions. If a requisition doesn't pass pre-budget checking you can't move forward.

Match Exceptions
The number one cause of match exceptions is that the receipt hasn't been entered. Once you receive an order, the nightly voucher matching process clears it for payment, unless there is another match problem with the price, quantity or unit or measure. A change order or new supplier invoice may be need to resolve those issues.

Note: You don't need to receive BuyCarolina orders, although it doesn't cause problems if you do.

VISP for Invoices
Any time you have an invoice related to a purchase order, you need to upload it using VISP. Find instructions on the ccinfo.unc.edu website (http://ccinfo.unc.edu > Training > Resources).