



Understanding BuyCarolina Orders

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Table of Contents

1 Overview of the BuyCarolina Purchasing Process	3
Understanding BuyCarolina Orders	4
Finding the BuyCarolina Home Page	5
2 Requester Preferences	7
Working With Your Requester Preferences	8
3 Ordering from BuyCarolina	13
Placing an Order from BuyCarolina	14
Using a Quote for Purchase	22
Finalizing Your Order on the Checkout - Review and Submit Page	23
4 Editing and Adding Details to Your BuyCarolina Order	27
Naming Your BuyCarolina Requisition Order	28
Deleting Lines from Your BuyCarolina Requisition Order	29
Entering Comments that Apply to Your Entire Requisition Order	30
Adding, Seeing, and Deleting Attachments From Your BuyCarolina Order or Purchase Requisition	32
5 Funding and Shipping Changes to an Order	37
Splitting the Funding on One Line of Your Order	38
Changing the Information That is Filled in Automatically for Each of Your Orders Based on Your Requester Preferences	41
Mass Change: Changing the Shipping Instructions or the Chartfield Values for an Entire Requisition	44
6 Finding, Seeing, and Printing Your Submitted Orders	47
Finding a Requisition	48
Printing a Requisition	50
Finding and Formatting Your Purchase Order (PO) Number	52
Seeing the Reason a Requisition was Denied	54
Seeing a Requisition's Life Cycle	55

Accessing Your Recently Ordered Items	56
7 Canceling or Returning an Order	59
Canceling a BuyCarolina Order	60
Returning a BuyCarolina Order	61
BuyCarolina Appendix	65
Additional Resources and Learning Opportunities	66
Requester Preferences Field Guide	67

1 Overview of the BuyCarolina Purchasing Process

In this chapter, you will learn how to:

- Identify the steps Departmental BuyCarolina Requesters complete to move BuyCarolina purchases through ConnectCarolina successfully.

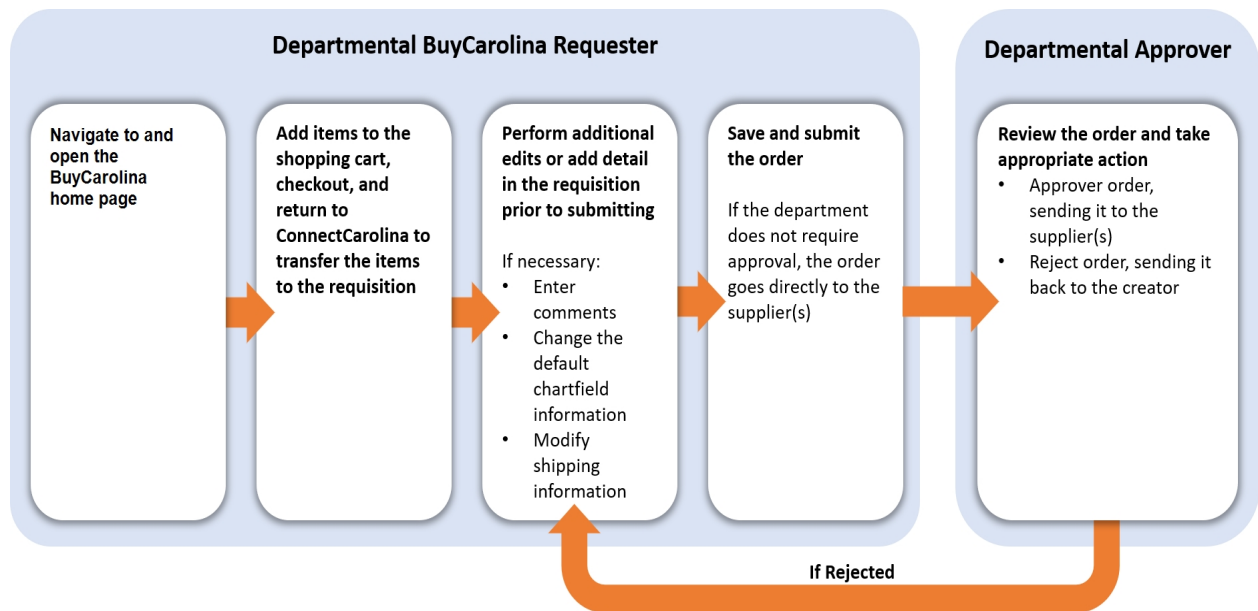
Understanding BuyCarolina Orders

BuyCarolina streamlines the purchasing process and simplifies purchasing from select suppliers who extend special pricing and offers to UNC-Chapel Hill.

When departmental BuyCarolina requesters need to place an order for goods from BuyCarolina suppliers, they go to the BuyCarolina page in ConnectCarolina, search for the goods, add items to their shopping cart, and complete checkout in ConnectCarolina. The departmental BuyCarolina 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(s) when the next batch process job runs, which happens every hour of the workday.

BuyCarolina purchases are a type of requisition and go directly from the departmental approver to the supplier for fulfillment. BuyCarolina 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 BuyCarolina.



Finding the BuyCarolina Home Page

The BuyCarolina Home Page can be accessed using one of two options. From the Admin WorkCenter homepage in ConnectCarolina do one of the following:

- Click the **BuyCarolina** link from the Admin WorkCenter Links tile.
- Choose the menu option **Finance WorkCenter > UNC Favorites > BuyCarolina > Click to Enter BuyCarolina.**

Result: The system displays the BuyCarolina home page.

The screenshot shows the BuyCarolina home page with the following sections and annotations:

- Notifications:** A section titled "Welcome to BuyCarolina" with instructions to use the search bar or click on a supplier's name under Additional Stores. An annotation points to this section: "Displays important messages and notifications from Procurement Services".
- To Do:** A section titled "You have no To Dos." with a "view all" link.
- Additional Stores:** A section titled "Additional Stores" displaying a grid of supplier logos including Agilent, Airgas, Amazon Business, Apple, Applied, ARCO, BIO-RAD, CDW, DELL, FASTENAL, Grainger, Graybar, Enterprise PRO, life, MAYER, MSC, PerkinElmer, QIAGEN, Roche, and Siemens. An annotation points to this section: "The Additional Stores section display all of the stores that are available. You can click on the store tile to shop items from that".
- Suppliers not included in search results:** A section titled "Suppliers not included in search results" with a date of 08/03/20. It lists suppliers: ARCO, Bio-Rad, Lenovo, Mayer Electric, Software Distribution, and Stor. An annotation points to this section: "Displays suppliers who are not included in search results."
- Recent Activity:** A section titled "Recent Activity" with a "view all" link. An annotation points to this section: "Displays orders that you have recently placed."
- Transaction Limits:** A section titled "Transaction Limits" with a date of 08/03/20. It states: "All suppliers are approved for e-Pro purchases up to \$25K per transaction except for these suppliers who have a \$5K limit: Airgas, Amazon, ARCO, PerkinElmer, Staples, Stor." An annotation points to this section: "All BuyCarolina suppliers are approved for purchases up to \$25,000 per transaction with the exception of the suppliers listed in this section. These suppliers have a purchase limit of \$5,000 per transaction."

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.

Working With Your Requester Preferences

Before a Departmental BuyCarolina purchaser can access BuyCarolina, Requester Preferences must be entered for required fields. Requester Preferences are default values established on the Requester Setup page. Once you set the default values, they are used on all of your BuyCarolina and non-BuyCarolina requisitions, unless you take action to change them within the individual purchase.

Setting Your Requester Preferences

Within ConnectCarolina, go to the Admin WorkCenter page and follow these steps to see, set up, or change your requester preferences:

1. Go to **Finance WorkCenter > BuyCarolina/Purchase Order > Requester Setup**.
2. Click the **Find an Existing Value** tab.
3. Do one of the following:
 - In the Requester field, enter your UNC Onyen.
 - In the Description field, enter your first and last name.
4. Click the **Search** button.

Result: The system displays the Requester Setup page.

5. Complete the required fields. You must enter a default for the following chartfields:

In this required field:	Do the following:
Location Set ID*	Before entering any default information, enter either UNCCH or UNCGA in this field.

In this required field:	Do the following:
Ship To*	<p>Enter the ship to address or follow the steps below to search for the appropriate address:</p> <ol style="list-style-type: none"> Click the Lookup (magnifying glass) icon. <p>Result: The system displays the first 300 ship to addresses.</p> <ol style="list-style-type: none"> In the Description field, change “begins with” to “contains.” Type a word or two to describe your location and click Look Up. Click the link for the ship to address you need.
Location*	<p>Enter your location or follow the steps below to search for your location:</p> <ol style="list-style-type: none"> Click the Lookup (magnifying glass) icon. <p>Result: The system displays the first 300 addresses.</p> <ol style="list-style-type: none"> In the Description field, change “begins with” to “contains.” Type a word or two to describe your location and click Look Up. 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.

Requester Setup

Requester: _____ *Status: Active

Requisition Defaults

ShipTo SetID: UNCCCH

*Location SetID: UNCCCH

PO Origin SetID: UNCCCH

Currency: USD Dollar

Phone:

Fax:

Ship To:

*Location:

Origin: ONL

☐ Override Auto Item Substitute

☐ Use Only Assigned Catalogs

☐ Consolidate with other Reqs

Requisition Status

☒ Open

☐ Pending Approval

☒ Price Can Be Changed on Order

☐ Defaults Inventory BU

ChartFields

Personalize | Find | View All |

GL Unit	Fund	Source	Account	Dept	PC Bus Unit	Project ID	Activity	Program	Cost Code 1	Cost Code 2	Cost Co
UNCCCH <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>					<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

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

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.

*Ship To

6. 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 or Source. It can save time and eliminate the opportunity for data entry errors.

In this optional field:	Do the following:
Fund	<p>Look up, or enter, the Fund chartfield..</p> <p>A Fund chartfield is a single 5-digit code capturing both major fund group (first 3 digits) and purpose (final 2 digits).</p>
Source	<p>Look up, or enter, the Source. The Source is a 5-digit chartfield indicating the specific Source that is supporting your transaction.</p> <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>
Account	<p>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.</p>
Program	<p>Look up, or enter, the Program chartfield.</p> <p>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.</p>
Cost Code 1	<p>Look up, or enter, Cost Code 1.</p> <p>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.</p>
Cost Code 2	<p>Look up, or enter, Cost Code 2.</p>
Cost Code 3	<p>Look up, or enter, Cost Code 3.</p>
Affiliation	<p>Look up, or enter, the Affiliation.</p>
Fund Affiliation	<p>Look up, or enter, the Fund Affiliation.</p>

7. Click the **Save** button.

Result: The system saves the default values, which fill in automatically when you create a BuyCarolina or non-supplier catalog requisition.

3 Ordering from BuyCarolina

In this chapter, you will learn how to:

- Create a BuyCarolina order.
- Submit a BuyCarolina order.

Placing an Order from BuyCarolina

You use the BuyCarolina to order supplies from single or multiple suppliers in the system. These suppliers extend special pricing and offers to UNC-Chapel Hill.

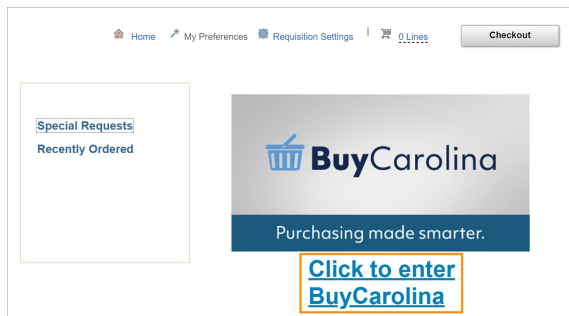
Each supplier has a set maximum transaction limit for a single BuyCarolina purchase. If you need to make a purchase from a supplier listed in BuyCarolina for an amount that exceeds the set maximum for the supplier, you need to create a purchase requisition instead. The BuyCarolina suppliers purchasing thresholds are listed on the BuyCarolina home page in the Transaction Limits section.

Creating a BuyCarolina Order

Once you have your Requester Preferences set, you can place orders in BuyCarolina. If you have not set your Requester Preferences, go to *Working With Your Requester Preferences*, page 8 for instructions on setting them.

Follow these steps to create a BuyCarolina order.

1. From the Admin WorkCenter homepage in ConnectCarolina, click the **BuyCarolina** link from the Admin WorkCenter Links tile.
2. Click the **Click to enter BuyCarolina** link.



Result: The system displays the BuyCarolina home page.

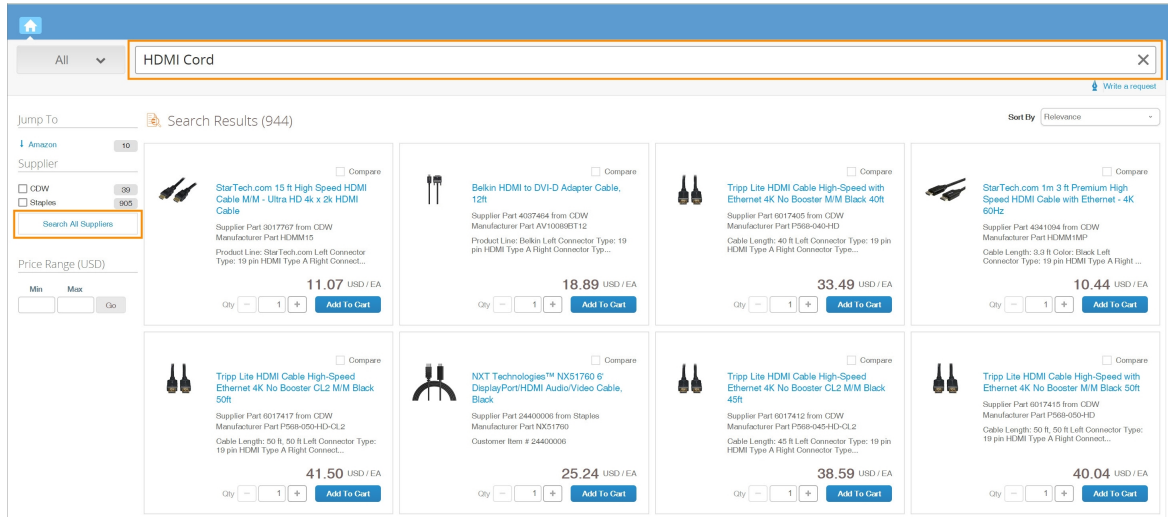
Searching for Items in BuyCarolina

When searching for items in BuyCarolina, you can use the search field at the top of the page to search across multiple suppliers.

3. In the search field, enter a term to search for the products you want to purchase and press the Enter key on your device. Try to be as specific with your search terms as possible.

Result: The system displays results from up three suppliers who are most likely to have the item you're looking for in stock.

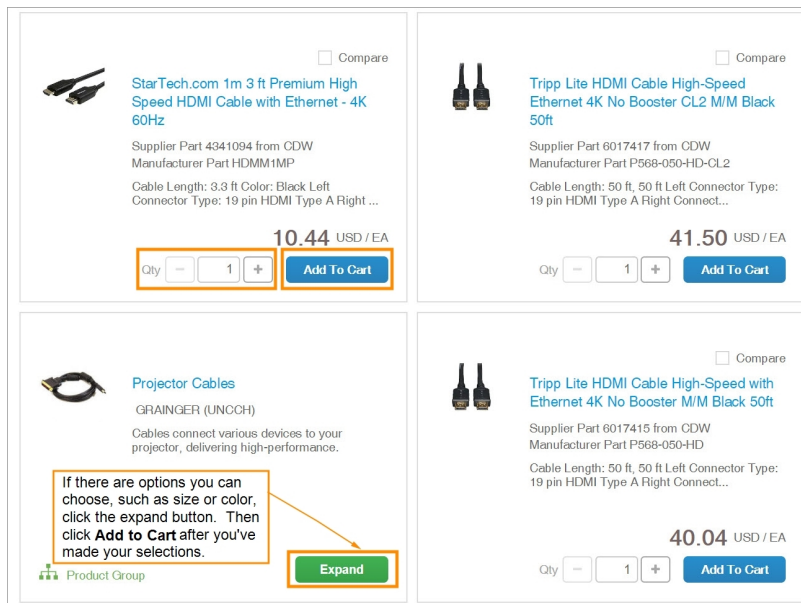
4. If you want to see result from all suppliers, click the **Search All Suppliers** link.



Results: The system displays the search results to include all suppliers that offer items based on your search.

Adding Items to Your BuyCarolina Cart, Except Amazon

5. If you need to change the quantity of the item, click the **+** button to increase or the **-** button to decrease the quantity.
6. Click the **Add to Cart** button to add the item to your cart.



Result: The system adds the item to your BuyCarolina cart.

7. To add additional items to your order, repeat steps 3-6.

Ordering Amazon Business Items

If you want to add an Amazon Business item to your BuyCarolina cart the item must be added to your Amazon Business cart first.

8. Click the **View on Amazon** button of the item you want to add to your BuyCarolina cart.

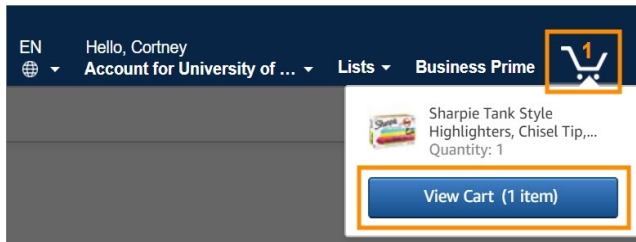


Result: The system opens Amazon Business in a new window.

9. Click the **Add to Cart** button in Amazon Business.

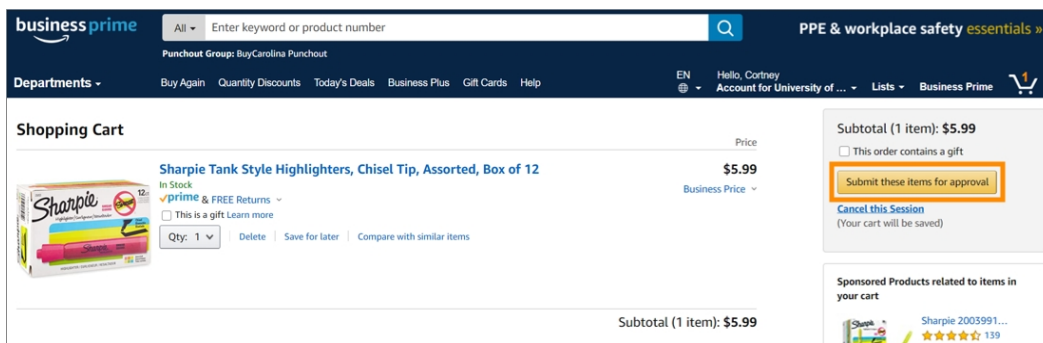


10. Hover over the **cart icon** in Amazon Business.
11. Click the **View Cart** button.



Result: The system displays your Amazon Business Shopping Cart.

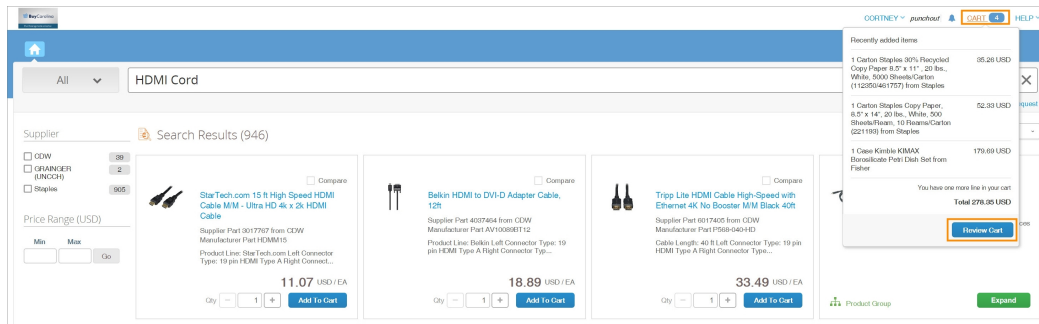
12. Review the items in the Amazon Business cart and adjust the quantity of the items if necessary. Once the item(s) in the cart are submitted for approval from the Amazon Business cart, you can't adjust the quantities in the BuyCarolina
13. Click the **Submit these items for approval** button.



Result: The items are added to your BuyCarolina cart.

Managing Items in Your BuyCarolina Cart

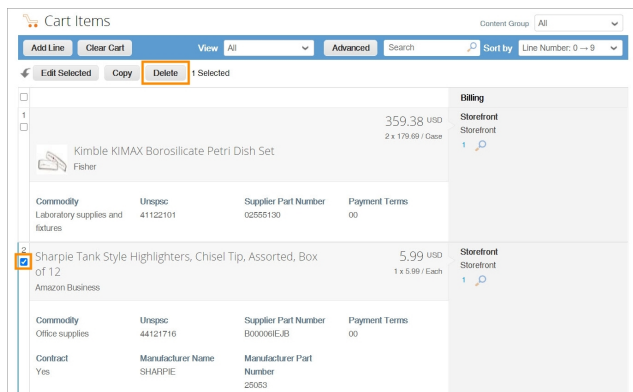
14. Hover over the **CART** link to review the items in your cart.
15. Do one of the following to manage the items in your cart or begin the checkout process:
 - Click the **Review Cart** button.
 - Click the **CART** link.



Result: The system displays the Review Cart page.

Deleting Items

18. If you need to delete an item from your cart, mark the checkbox beside the item you want to delete and click the **Delete** button

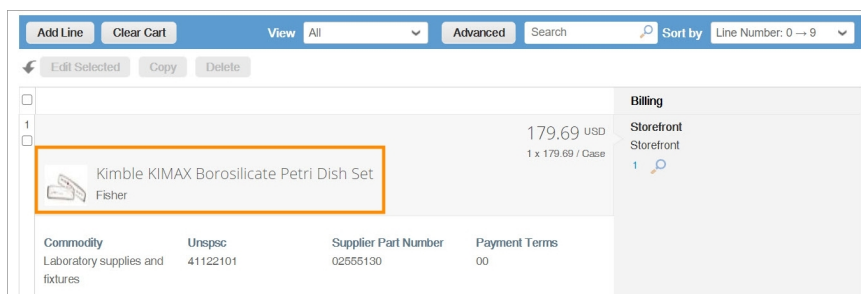


Result: The item is removed from the cart.

Adjusting Quantities of Items

If you have added an item to your cart through the search (but not from Amazon Business), you can adjust the quantity that you're ordering on the Review Cart page. For Amazon Business and any items that you have added through shopping the catalogs directly, you must delete the item from your cart and add it again with the correct quantity.

19. To adjust the quantity, click on the line item.



Result: The details of the item to be ordered appear.

20. Click the **QTY** field and enter the quantity you want to order.

21. Click the **Save** button.

The screenshot shows a form for adding an item to a cart. The 'Item' field contains 'Kimble KIMAX Borosilicate Petri C'. The 'Supplier' is 'Fisher'. The 'Commodity' is 'Laboratory supplies and fixtures'. The 'Unit Price' is '179.69' and the 'Unit' is 'USD'. The 'Qty' field is highlighted with an orange box and contains the value '1'. The 'UOM' is 'Unspc' and the 'Unspc' value is '41122101'. The 'Supplier Part Number' is '02555130' and the 'Payment Terms' are '00'. The 'Need By' date is 'mm/dd/yy'. The 'Transmission Method' is 'Supplier Default'. The 'Manufacturer Name' and 'Manufacturer Part Number' fields are empty. The 'Attachments' section has links for 'Add', 'File', 'URL', and 'Text'. At the bottom right, there are 'Cancel', 'Delete', and 'Save' buttons, with the 'Save' button highlighted with an orange box.

Emptying Your Cart

If you no longer need the items in your cart, you can empty your cart.

22. Click the **Clear Cart** button.

The screenshot shows the 'Cart Items' page. The 'Clear Cart' button is highlighted with an orange box. The page includes a 'Content Group' dropdown set to 'All', a 'View' dropdown set to 'All', an 'Advanced' search button, a 'Sort by' dropdown set to 'Line Number: 0 → 9', and a 'Billing' button. Below the buttons, there is a table with one row and one column, and a '1 Selected' indicator.

Result: A pop-up message appears confirming you want to empty your cart.

23. Click the **OK** button.

Result: Your BuyCarolina cart is empty.

Checking Out in BuyCarolina

24. At the bottom right of the Review Cart page, click the **Checkout** button.

3 Ordering from BuyCarolina

4	Staples 30% Recycled Copy Paper 8.5" x 11" , 20 lbs., White, 5000 Sheets/Carton (112350/461757) Staples	35.26 USD 1 x 35.26 / Carton	Storefront Storefront 1
Commodity	Urespo	Supplier Part Number	Payment Terms
Paper products	14111507	492072	00
Contract	Manufacturer Name	Manufacturer Part Number	
Yes	Domtar	112350/461757	

Per page 15 | 45

Total 278.35 USD

Checkout

Results: The system displays one of the following:

- If your cart contains items from a single supplier the system displays the ***Finalizing Your Order on the Checkout - Review and Submit Page, page 23*** in ConnectCarolina with the products you selected from BuyCarolina.
- If your cart contains items from multiple suppliers, the system displays the Edit Requisition page in Buy Carolina, go to step 25.

25. Click the **Transfer Cart** button.

Edit Requisition #387

Created By: Cortney

Justification: None

Ship-To Address

Address

400 Robertson St
Robertson Street, 400-25
Carrboro, NC 27599
United States
Location Code: 563_25
Attn: Cortney

Cart Items

Billing

Related Policies - Gift Cards

1

StarTech.com 15 ft High Speed HDMI Cable M M Ultra HD 4k x 2k HDMI Cable COW

11.07 USD
1 x 11.07 / Each

Storefront
Storefront
1

Commodity

Unigro

Supplier Part Number

Payment Terms

Electrical wire and cable and harness

26121604

3017767

00

Contract

Manufacturer Name

Manufacturer Part Number

Yes

StarTech.com

HDMI 15

2

Kimble KIMAX Borosilicate Petri Dish Set Fisher

179.69 USD
1 x 179.69 / Case

Storefront
Storefront
1

Commodity

Unigro

Supplier Part Number

Lead Time

Laboratory supplies and fixtures

41122101

02555130

11

Payment Terms

Contract

00

Yes

3

Staples Copy Paper, 8.5" x 14", 20 lbs., White, 500 Sheets/Ream, 10 Reams/Carton (221193) Staples

52.33 USD
1 x 52.33 / Carton

Storefront
Storefront
1

Commodity

Unigro

Supplier Part Number

Payment Terms

Paper products

14111507

125987

00

Contract

Manufacturer Name

Manufacturer Part Number

Yes

Danlar

221193

4

Staples 30% Recycled Copy Paper 8.5" x 11", 20 lbs., White, 5000 Sheets/Carton (112350/461757) Staples

35.26 USD
1 x 35.26 / Carton

Storefront
Storefront
1

Commodity

Unigro

Supplier Part Number

Payment Terms

Paper products

14111507

462072

00

Contract

Manufacturer Name

Manufacturer Part Number

Yes

Danlar

112350/461757

Total 4 Units: 278.35 USD

Transfer Cart

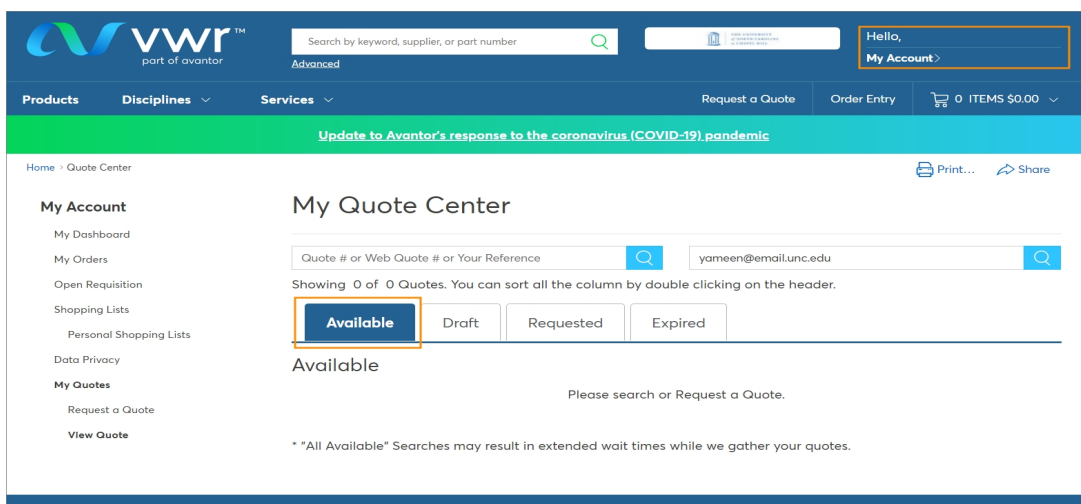
Result: The system displays the *Finalizing Your Order on the Checkout - Review and Submit Page, page 23* in ConnectCarolina with the products you selected from BuyCarolina.

21

Using a Quote for Purchase

A supplier may provide a quote for an item or service that is different from what is listed in BuyCarolina. Each supplier in BuyCarolina has a different process for purchasing items or services using a quote. You cannot use the Open Buy search bar to obtain or find quotes for purchase.

If you have a quote from a supplier, go to that supplier's catalog under the Additional Stores heading in BuyCarolina and follow the appropriate steps based on the supplier's website. For example, Fisher Scientific and VWR have different steps to follow after visiting their store in BuyCarolina. In most, instances you will need to navigate to the My Account, Your Account, Manage Your Account, or something similar to obtain the quote for purchase. See the screenshots below for examples.



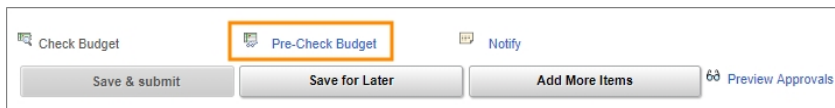
Once you see the quote you are looking for you can add it to your cart.

Finalizing Your Order on the Checkout - Review and Submit Page

Once you submit your order in the BuyCarolina, 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 BuyCarolina, page 14* for information on creating BuyCarolina orders.

Completing Your Order

1. After you submit an order from BuyCarolina, 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:
 - *Naming Your BuyCarolina Requisition Order, page 28*
 - *Deleting Lines from Your BuyCarolina Requisition Order, page 29*
 - *Adding, Seeing, and Deleting Attachments From Your BuyCarolina Order or Purchase Requisition, page 32*
 - *Changing the Information That is Filled in Automatically for Each of Your Orders Based on Your Requester Preferences, page 41*
 - *Splitting the Funding on One Line of Your Order , page 38*
 - *Mass Change: Changing the Shipping Instructions or the Chartfield Values for an Entire Requisition, page 44*
2. When you have finished editing your BuyCarolina 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.

Results: After you Pre-Check Budget, the system displays one of the following:

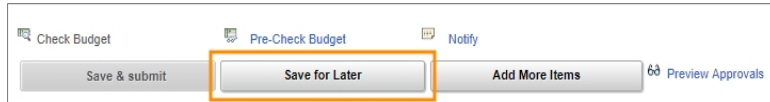
- If there is enough budget, the **Save & submit** button becomes active and click-able.
- If there is not enough budget, the system displays an error message. You can work with your business manager to move budget to the chartfield string or

3 Ordering from BuyCarolina

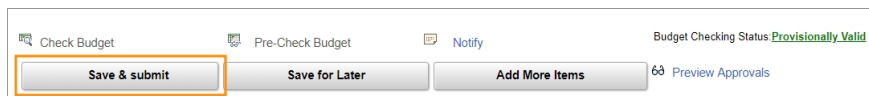
to use different chartfield values. Once fixed, you will need to click Pre-Check Budget again to move forward in the ordering process.

3. 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 56 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.

A screenshot of a 'Confirmation' page. At the top, it says 'Your requisition has been submitted.' Below this, it lists details for a requisition: Requested For: Teresa Tester, Requisition Name: 1000419190, Requisition ID: 1000419190, Business Unit: UNCCH, Status: Pending, Priority: Medium, and Budget Status: Provisionally Valid. To the right, it shows 'Number of Lines: 1' and 'Total Amount: 186.99 USD'. Below the details, there are four buttons: 'View printable version' (highlighted with an orange box), 'Edit This Requisition', 'Check Budget', and 'Pre-Check Budget'. An orange arrow points from the 'View printable version' button to a text box that says 'BuyCarolina orders cannot be edited.' Below the buttons is a 'Department Level Stage' section showing a dropdown for 'Requisition 1000419190: Pending' and a 'Start New Path' button. Underneath, it shows 'Department Path I' with a 'Pending' status and 'Multiple Approvers Req Dept Path I Step I'. At the bottom, there are buttons for 'Apply Approval Changes', 'Create New Requisition', and 'Manage Requisitions' (highlighted with an orange box).

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 BuyCarolina Order

In this chapter, you will learn how to:

- Name your BuyCarolina order.
- Delete lines from your BuyCarolina order.
- Enter comments to your entire BuyCarolina order.
- Attach documents to a BuyCarolina order.

Naming Your BuyCarolina Requisition Order

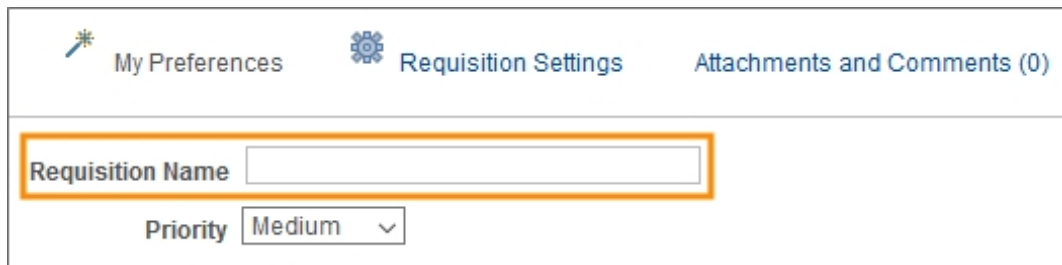
Once you have submitted a BuyCarolina order, you can name the order from the Checkout - Review and Submit page. Refer to *Placing an Order from BuyCarolina, page 14* for details on creating a BuyCarolina order.

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 BuyCarolina order.

BuyCarolina orders turn into requisitions as they move through the fulfillment process. Therefore, the terms "order" and "requisition" may be used interchangeably in many cases.

1. Once you have submitted an order from BuyCarolina, you can name your order from the Checkout - Review and Submit page.

In this field:	Do the following:
Requisition Name	Enter a name to help you identify the BuyCarolina requisition later. Consider following a consistent naming convention to assist you in searching and identifying orders more quickly.



My Preferences Requisition Settings Attachments and Comments (0)

Requisition Name

Priority Medium ▼

2. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page, page 23* for information about completing your order or for a list of additional edits you can make to it.

Deleting Lines from Your BuyCarolina Requisition 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.

Line	Description	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ <input type="checkbox"/> 1	 Staples Notepads, 8.5" x 11.75	STAPLES BUSINESS ADVANTAGE	10.0000	Dozen	5.1900	51.90		 Add	

2. When prompted, click the **OK** button to confirm that you want to delete the selected line.

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.

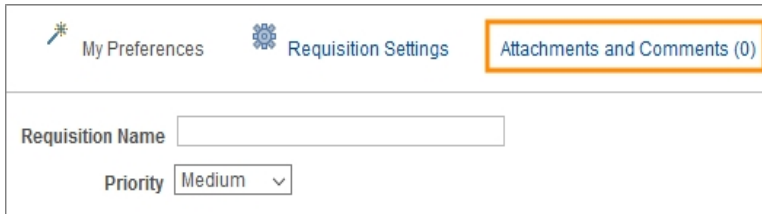
Note: If the order has already been saved and you delete every line, the system will display an error message. You must leave at least one line of the order intact or start a new order from scratch.

3. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page*, page 23 for information about completing your order or for a list of additional edits you can make to it.

Entering Comments that Apply to Your Entire Requisition Order

If you need to, you can enter comments that apply to the entire order. These are commonly referred to as header comments.

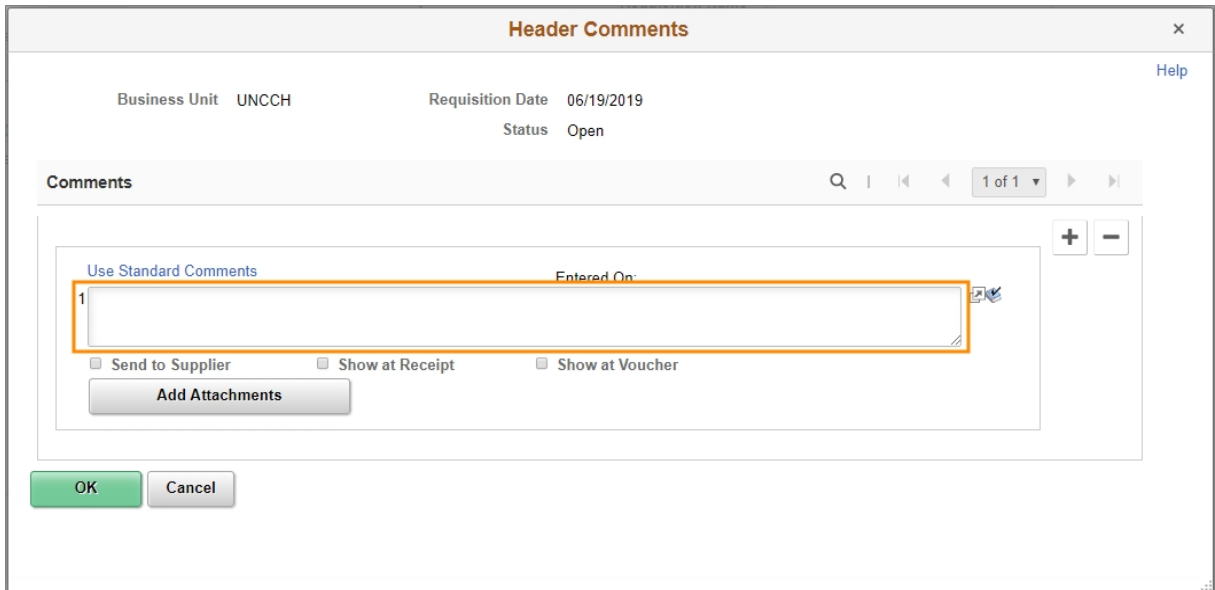
1. On the top of the Checkout - Review and Submit page, click the **Attachments and Comments** link.



The screenshot shows the top navigation bar of the system. It contains three links: 'My Preferences' with a star icon, 'Requisition Settings' with a gear icon, and 'Attachments and Comments (0)' which is highlighted with an orange box. Below the navigation bar, there is a 'Requisition Name' text input field and a 'Priority' dropdown menu currently set to 'Medium'.

Result: The system displays the Header Comments page.

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



The screenshot shows the 'Header Comments' dialog box. At the top, it displays 'Business Unit UNCCH', 'Requisition Date 06/19/2019', and 'Status Open'. Below this is a 'Comments' section with a search icon and navigation controls. A large text input field is highlighted with an orange box, containing the number '1'. To the right of the input field is a 'Use Standard Comments' link and an 'Entered On' label. Below the input field are three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. An 'Add Attachments' button is located below these checkboxes. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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.

3. 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.

In this field:	Do the following:
Send to Supplier	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.
Show at Receipt	Mark this checkbox if you want the comment to appear on the receipt documentation.
Show at Voucher	Mark this checkbox if you want the comment to appear on the voucher.

Header Comments

Business Unit UNCCH Requisition Date 06/19/2019 Status Open

Comments

1

Use Standard Comments Entered On:

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Add Attachments

OK Cancel

4. Click the **OK** button to save the comment and return to the Checkout - Review and Submit page.
5. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page*, page 23 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 BuyCarolina Order or Purchase Requisition

You may attach documents to a BuyCarolina order or purchase requisition.

For purchases outside the BuyCarolina process, your comments and attachments can be seen and reviewed by central purchases staff.

However, BuyCarolina purchases are not reviewed by central purchasing. They do not see or review comments or attachments for BuyCarolina orders. Attachments to BuyCarolina orders can only be seen by you and your departmental approver unless you click Send to Supplier (step 6).

Adding Attachments to a BuyCarolina Order or Purchase Requisition

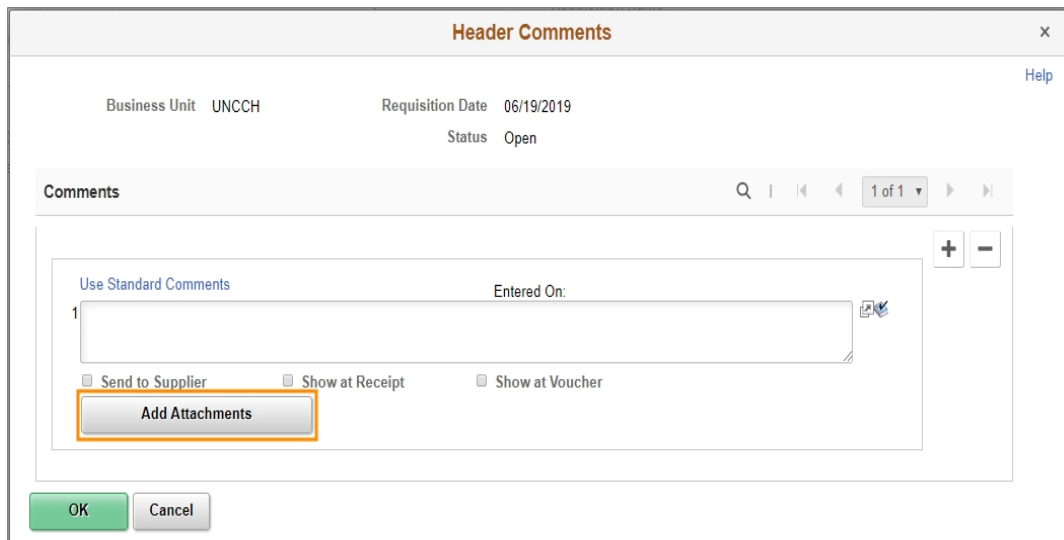
1. If you want to attach a document, click the **Attachments and Comments** link.



The screenshot shows the top navigation bar of the BuyCarolina system. It contains three links: 'My Preferences' with a star icon, 'Requisition Settings' with a gear icon, and 'Attachments and Comments (0)' which is highlighted with an orange rectangular box. Below these links are two input fields: 'Requisition Name' with a text box and 'Priority' with a dropdown menu currently set to 'Medium'.

Result: The system displays the Header Comments page.

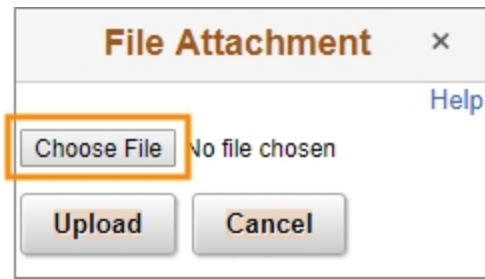
1. Click the **Add Attachments** button.



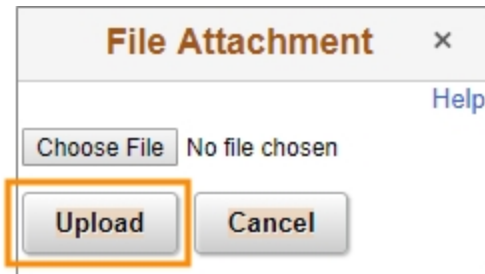
The screenshot shows the 'Header Comments' dialog box. At the top, it displays 'Business Unit UNCCH', 'Requisition Date 06/19/2019', and 'Status Open'. Below this is a 'Comments' section with a search bar and a '1 of 1' indicator. A large text area for comments is present, with a 'Use Standard Comments' link and an 'Entered On:' field. Below the text area are three checkboxes: 'Send to Supplier', 'Show at Receipt', and 'Show at Voucher'. The 'Add Attachments' button is highlighted with an orange rectangular box. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Result: The system displays the File Attachment box.

2. Click the **Choose File** button.



3. 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.
4. Click the **Upload** button.



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

5. Check **Send to Supplier**, so that the supplier will be able to see the attachment.

▼ Attachments					
	Attached File	User/Date Time	View	Send to Supplier	
1	0.jpg	lillis2019-06-19-13.36.52.933	<button>View</button>	<input type="checkbox"/>	<input type="button" value="—"/>

6. Do one of the following
 7. To attach more files, repeat steps 1-6.
 8. View and/or delete the attachment using the steps below.
9. Click the **OK** button to return to the Checkout - Review and Submit page.
10. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page*, page 23 for information about completing your order or for a list of additional edits you can make to it.

Seeing Attachments for a BuyCarolina 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.



My Preferences Requisition Settings **Attachments and Comments (0)**

Requisition Name

Priority Medium ▼

2. On the Header Comments page, click the **View** button.

▼ Attachments					
	Attached File	User/Date Time	View	Send to Supplier	
1	0.jpg	lillis2019-06-19-13.36.52.933	View	<input type="checkbox"/>	<input type="button" value="-"/>

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

Deleting Attachments from a BuyCarolina 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.



My Preferences Requisition Settings **Attachments and Comments (0)**

Requisition Name

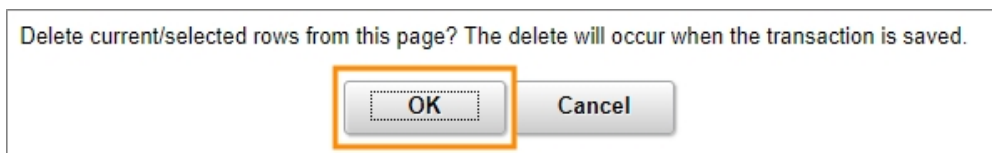
Priority Medium ▾

2. On the Header Comments page, click the **Minus** button at the right end of the attachment line.



▼ Attachments					
	Attached File	User/Date Time	View	Send to Supplier	
1	0.jpg	lillis2019-06-19-13.36.52.933	<button>View</button>	<input type="checkbox"/>	

3. Click the **OK** button to confirm that you want to delete the attachment.



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

OK Cancel

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 23 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

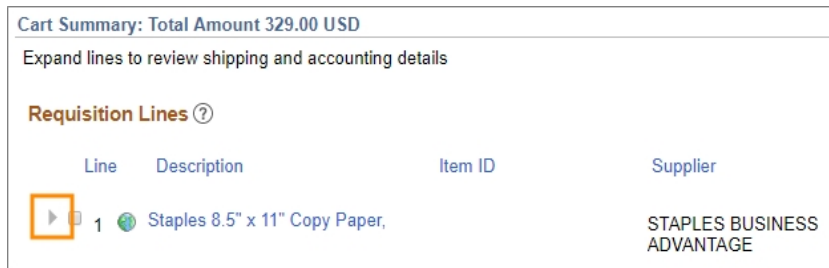
In this chapter, you will learn how to:

- 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.

Splitting the Funding on One Line of Your Order

Splitting funding for BuyCarolina 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 BuyCarolina, page 14* for information on creating BuyCarolina 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 329.00 USD

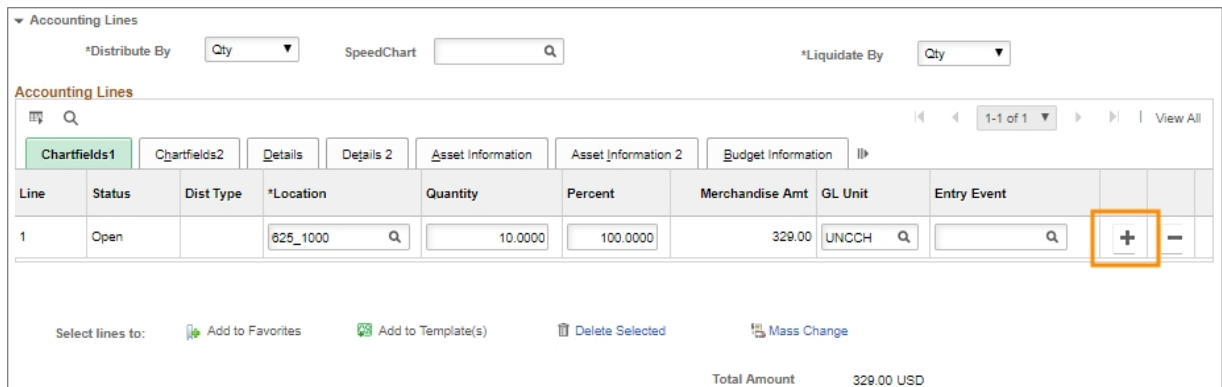
Expand lines to review shipping and accounting details

Requisition Lines ?

Line	Description	Item ID	Supplier
1	Staples 8.5" x 11" Copy Paper,		STAPLES BUSINESS ADVANTAGE

Result: The system displays additional details, including Accounting Lines.

2. Click the **plus** icon in the Accounting Lines section as many times as needed to split charge appropriately.



Accounting Lines

*Distribute By: Qty SpeedChart: *Liquidate By: Qty

Accounting Lines

Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		825_1000	10.0000	100.0000	329.00	UNCCH	

Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 329.00 USD

Result: The system displays additional accounting lines.

Note: If you need to Zoom in or out to see the full Accounting Lines section on the screen, hold down the CTRL key on your keyboard and push the + key to Zoom in or - key to Zoom out.

3. Complete the fields, if necessary:

In this field:	Do the following:
Distribute By	<p>Choose the distribution option you want:</p> <ul style="list-style-type: none"> Select Quantity if you want to split the cost by quantity. Select Amt if you want to split the cost by amount.
Liquidate By	<p>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:</p> <ul style="list-style-type: none"> Quantity if you want to liquidate by quantity. Amt if you want to liquidate by amount. <p>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.</p>
Location	Location is filled in by default on BuyCarolina orders based on your user profile.
Quantity	If you chose to distribute by Quantity, enter the quantity for each line. If you chose to distribute by Amt, the system doesn't display this box.
Percent	If you chose to distribute by Amt, enter the percentage to assign to each line. If you chose to distribute by Quantity, leave this field blank.

Accounting Lines

*Distribute By Qty Amt Qty

SpeedChart

*Liquidate By Qty

Accounting Lines

Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event		
1	Open		625_1000	5.0000	50.0000	164.50	UNCCH		+	-
3	Open		625_1000	3.0000	30.0000	98.70	UNCCH		+	-
2	Open		625_1000	2.0000	20.0000	65.80	UNCCH		+	-

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

- To enter chartfield strings, click the **Chartfields2** tab. You can change chartfield strings for all lines at the same time.

Accounting Lines

Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information

Fund	Source	Account	Dept	PC Bus Unit	Project	Activity	Program	Cost Code 1	Cost Code 2	Cost Code 3
20101	12001	531110	318300							
20101	12001	531110	350100							
20101	12001	531110	310100							

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 23 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.

Cart Summary: Total Amount 329.00 USD

Expand lines to review shipping and accounting details

Requisition Lines ?

Line	Description	Item ID	Supplier
 1	Staples 8.5" x 11" Copy Paper,		STAPLES BUSINESS ADVANTAGE

2. Complete any or all of the following fields:

In this field:	Do the following:
Due Date	This field is not used for BuyCarolina orders at UNC-Chapel Hill.
Ship To	<p>Enter the Ship To location or follow the steps below to search for the appropriate Ship To location:</p> <ol style="list-style-type: none"> Click the Lookup (magnifying glass) icon. <p>Result: The system displays the first 300 Ship To addresses.</p> <ol style="list-style-type: none"> In the Description field, change “begins with” to “contains”. Type a word or two to describe your location and click Look Up. Click the link for the Ship To location you need. <p>Result: The system will send this line to the selected location.</p>
Attention	<p>Enter the name of the person to whose attention the shipment will be sent.</p> <p>Note: If you work in Auxiliary Services, enter the shop, job, and phase code here, if applicable.</p>

5 Funding and Shipping Changes to an Order

In this field:	Do the following:
Location	Enter the location you are ordering from. Location is filled in by default for supplier catalog orders.
Quantity	<p>Do not change the quantity.</p> <p>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.</p> <p>Caution: Deleting the line before adding a line with the correct quantity will require you to create an entirely new BuyCarolina order.</p>

Requisition Lines ?

Line	Description	Item ID	Supplier
1	Staples 8.5" x 11" Copy Paper,		STAPLES BUSINESS ADVANTAGE

Shipping Line 1

*Ship To

Address 211 Manning Dr
ITS Manning-1000
Chapel Hill, NC 27514

Attention To

Due Date

▼ Accounting Lines

*Distribute By Qty

Accounting Lines

Line	Status	Dist Type	*Location
1	Open		<input type="text" value="625_1000"/> <input type="button" value="Q"/>

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

Accounting Lines

Fund	Source	Account	Dept	PC Bus Unit	Project	Activity	Program	Cost Code 1	Cost Code 2	Cost Code 3
20101	12001	531110	318300							

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

4. 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.

5. 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.

6. Refer to *Finalizing Your Order on the Checkout - Review and Submit Page*, page 23 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

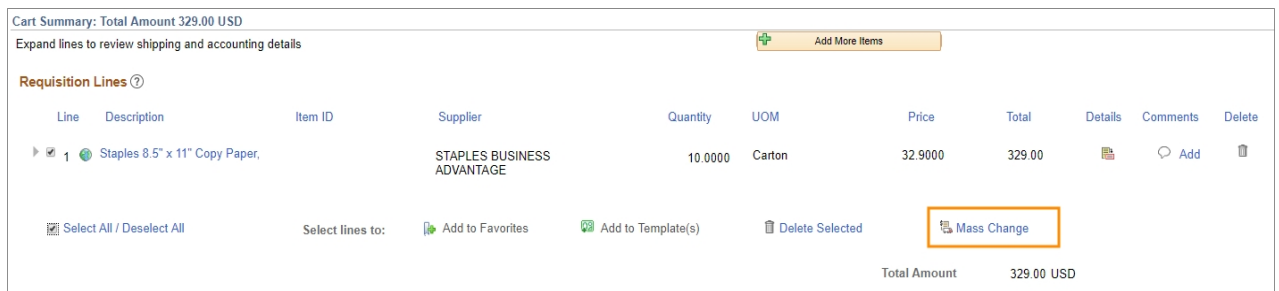
If you want to make the same change to every line item, use **Mass Change** to do so. Use this option to modify any of the following:

- shipping information.
- chartfields.

1. In the Requisition Lines section of the Checkout - Review and Submit page, check Select All/Deselect All.

Result: All Requisition Lines have checked checkboxes.

2. Click the **Mass Change** button.



Cart Summary: Total Amount 329.00 USD
Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Staples 8.5" x 11" Copy Paper,		STAPLES BUSINESS ADVANTAGE	10.0000	Carton	32.9000	329.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected **Mass Change**

Total Amount 329.00 USD

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 Requester 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 BuyCarolina 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 BuyCarolina, it sends your order through procurement, which does not handle BuyCarolina orders. This will delay - and may negate - your order.

Edit Lines/Shipping/Accounting for Selected Lines

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID Supplier Location
 Buyer Category

For BuyCarolina purchases, do not make any changes in this section.

Shipping Information

Ship To Location
 Due Date Attention
 Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

1-1 of 1 ▼

Chartfields1

Details

Asset Information

||>

Dist	Percent	Location	GL Unit	Fund	Source	Account	Dept	PC Bus Unit
1	<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

Load Values From Default fills in the chartfield boxes with default values from your Requestor Preferences.

[Load Values From Defaults](#)

4. Click the **OK** button.

Result: The system displays the Distribution Change Options page.

5. Choose the appropriate option:

In this field:	Do the following:
All Distribution Lines	Mark this checkbox to apply changes to all distribution lines.
Matching Distribution Lines	Mark this checkbox to apply changes to each existing distribution line by matching the distribution line numbers.
Replace Distribution Lines	Mark this checkbox to remove the existing distribution lines and replace them with distribution line changes.

Distribution Change Options

For the selected requisition lines, apply distribution changes to

- ☒ **All Distribution Lines**
Apply changes to all existing distribution lines.
- ☐ **Matching Distribution Lines**
Apply changes to each existing distribution line by matching the distribution line numbers.
- ☐ **Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

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

6 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 BuyCarolina order that has already been created.
- Find the purchase order (PO) number for a requisition and formatting it in a way suppliers can identify it.
- 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. From the Admin WorkCenter page in ConnectCarolina, choose this menu option:

Finance WorkCenter > BuyCarolina/Purchase Order > Manage Requisitions

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

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

3. Click the **Search** button.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit

UNCCH

Requisition Name

Requisition ID

Request State

All but Complete

Budget Status

Date From

06/11/2019

Date To

06/18/2019

Requester

Entered By

PO ID

Search

Clear

Show Advanced Search

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000469159	1000469159	UNCCH	06/18/2019	Pending	Prov Valid	329.00 USD	<div>[Select Action]</div> <div>Go</div>

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.

- 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.

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000469159	1000469159	UNCCH	06/18/2019	Pending	Prov Valid	329.00 USD	<div>[Select Action]</div> <div>Approvals</div> <div>Cancel</div> <div>Edit</div> <div>View Print</div> <div>[Select Action]</div> <div>Go</div>

Create New Requisition

Review Change Request

Review Change Tracking

Manage Receipts

Requisition Report

49

Printing a Requisition

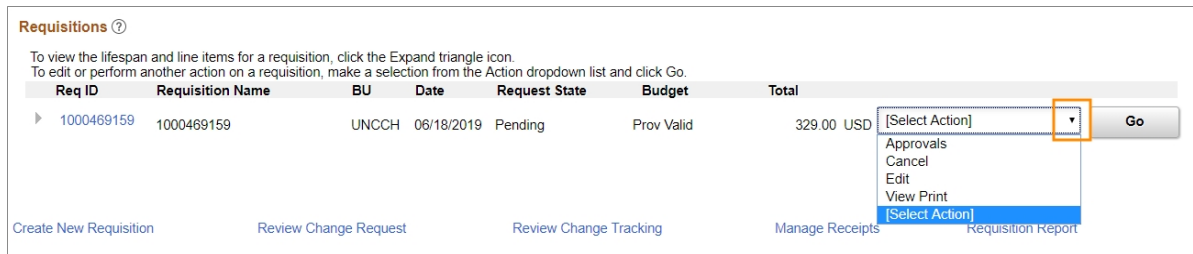
If you need a PDF file or printed copy of your requisition, you can do that on the Manage Requisitions page with the View Print action. Follow the steps below to learn how.

1. Refer to *Finding a Requisition*, page 48 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.

Finance WorkCenter > BuyCarolina/Purchase Order > Manage Requisitions.

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

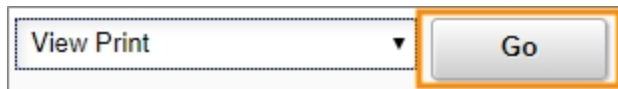
Result: The Select Action menu expands.



2. Click the **View Print** button.

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

3. Click the **Go** button.




4. 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.
5. 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.

Message

Do you want to print the requisition with distribution details ? (18036,11614)

Yes No

Result: The system opens a new browser window with a printer-friendly PDF report.



**PURCHASE REQUISITION
THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL**

Date Received	Dept. Contact Name and Phone Teresa Tester 919/962-2353	Requisition Number 1000419189
Requisition Date 1/17/2019	Buyer Code UNC_BUYER	Delivery Needed By
Quote Bid No.	Purchase Order No.	Start Date
Deliver To Teresa Tester	Ship To Address 211 Manning Dr ITS Manning-1000 Chapel Hill NC 27514 United States	End Date
Vendor (0000000020) STAPLES BUSINESS ADVANTAGE P O BOX 71217 CHICAGO IL 60694	Header Comments	Count of Attachments 1

Line	Qty	Unit	Item ID	Description	Unit Price	Extension
1	1	EA		Staples Kroy Mesh Task Chair, Black (50233-CC)	186.99	186.99
Total						\$186.99

7. Use your browser's print functionality to print the PDF requisition.
8. 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.

Finding and Formatting Your Purchase Order (PO) Number

BuyCarolina orders are a type of Purchase Requisition (PR). 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 UNCCCH. to the beginning of our purchase order numbers to ensure their uniqueness. Therefore, adding UNCCCH. to the full purchase order number - as illustrated below - when you communicate with suppliers allows them to find your order.

Purchase Order number in ConnectCarolina	7777777777
Purchase Order number on file with Suppliers	UNCCCH.7777777777










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

1. Refer to *Finding a Requisition*, page 48 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.
Finance WorkCenter > BuyCarolina/Purchase Order > Manage Requisitions.
2. Once you have found the requisition, click the arrow to the left of the requisition line.

Requisitions ?			
To view the lifespan and line items for a requisition, click the Expand icon.			
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.			
Req ID	Requisition Name	BU	Date
 1000399214	1000399214	UNCCCH	10/18/2018

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

3. Click on the **Purchase Orders** icon to view the PO number.

Requisitions ?							
To view the lifespan and line items for a requisition, click the Expand triangle icon.							
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000399214	1000399214	UNCCCH	10/18/2018	PO(s) Dispatched	Valid	195.80 USD	[Select Ac ▼]
Requester Teresa Entered By Teresa Priority Medium							
Pre-Encumbrance Balance 0.00 USD							
        							
Request Lifespan: Line Information							
Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Industrial Grade Liquid Nitr...	PO Dispatched	97.9000	USD	2.0000	CL	AIRGAS NATIONAL WELDERS

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.

Business Unit UNCCH

Requisition information Find | View All First 1 of 1 Last

Requisition ID 1000399214 Line Number 1

PO information Find | View All First 1 of 1 Last

PO Number 2000347975 Buyer UNC_BUYER Change Order

PO Date 10/19/2018 Supplier ID 0000000002 Terms 00 PO Status Dispatched

Lines Personalize | Find | View All | 1 of 1 | First 1 of 1 Last

Line	Item ID	Description	Merchandise Amt		UOM	PO Qty	Status	Line Details
1		Industrial Grade Liquid Nitrogen, 265 Liter Cylinder, 22 PSI	195.80	USD	CL	2.0000	Approved	

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.

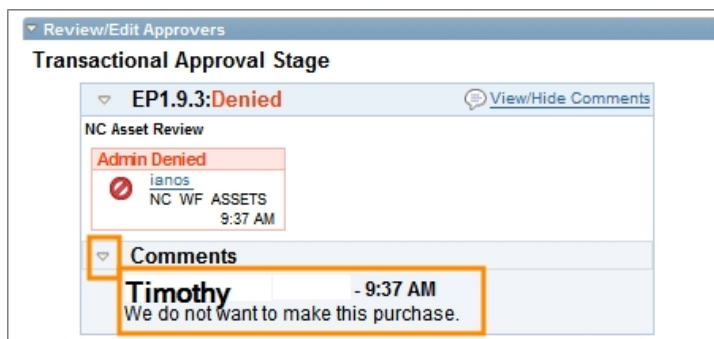
1. Refer to *Finding a Requisition*, page 48 for detailed information about finding your requisition. If you are already familiar with that process go directly to the path below to complete the remaining steps.

Finance WorkCenter > BuyCarolina/Purchase Order > Manage Requisitions.

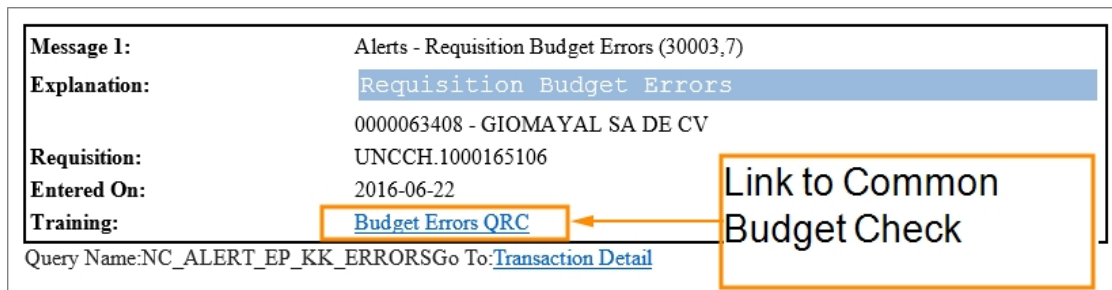
2. Once you see the requisition you are looking for in your search results, select Approvals from the Select Action menu.
3. Click the **Go** button.

Result: The system displays the Approval Status page.

4. Click the arrow to the left of Comments to view comments associated with the denial.



Budget Error Notification: If you create a requisition with budget errors, you receive an email alert. A sample of the email alert is below:



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 48 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.











Finance WorkCenter > BuyCarolina/Purchase Order > Manage Requisitions.

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

Requisitions ?			
To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.			
Req ID	Requisition Name	BU	Date
 1000399214	1000399214	UNCCH	10/18/2018

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.

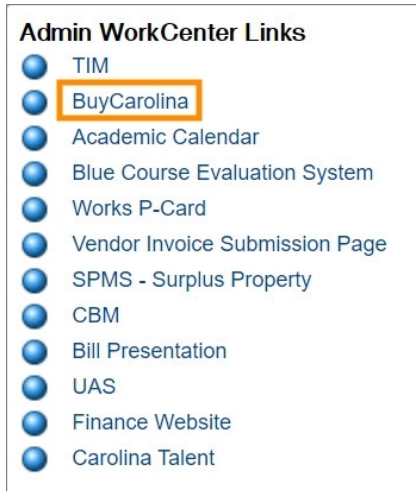
Requisitions ?							
To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.							
Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000419189	1000419189	UNCCH	01/17/2019	Pending	Prov Valid	186.99 USD	[Select Ac ▼]
Requester Teresa Entered By Teresa Priority Medium							
Pre-Encumbrance Balance 0.00 USD							
        							
Request Lifespan:							
Line Information							
Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	 Staples Kroy Mesh Task Chair...	Pending Approval	186.9900	USD	1.0000	EA	STAPLES BUSINESS ADVANTAGE

Note: As more information is added to the requisition, additional icons will be in color.

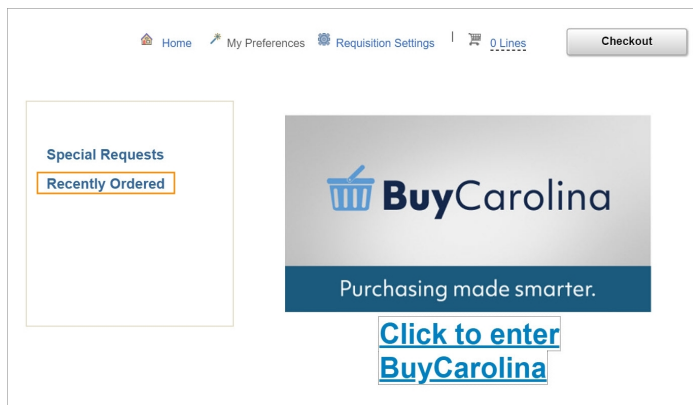
Accessing Your Recently Ordered Items

You can see recently ordered and approved items on the Recently Ordered page.

1. From the Admin WorkCenter homepage in ConnectCarolina select **BuyCarolina** from the Admin WorkCenter Links tile.

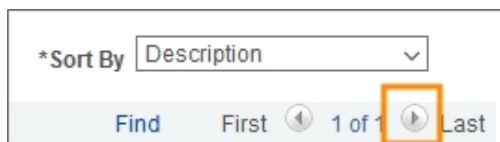


2. Click the **Recently Ordered** link.



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.



- 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.

Request Options

Recently Ordered ?

Special Requests
Recently Ordered

Sort By Description

Search Results
Find
First
1-5 of 5
Last

Test Line1
Most Recent Order Date 11/16/2018

Item ID		Supplier	FEDEX OFFICE
Supplier Item ID		Supplier ID	0000033293
Mfg Item ID		Manufacturer	
Price	1000.0000	Manufacturer ID	
UOM	Each	Lead Time	

Quantity

Add to Favorites
Add to Template(s)

Canakit Raspberry Pi 3 B+ (B Plus) Starter Kit (32)
Most Recent Order Date 11/06/2018

Item ID		Supplier	AMAZON.COM SERVICES II
Supplier Item ID	807BCC8PK7	Supplier ID	0000106041
Mfg Item ID	99212	Manufacturer	
Price	79.9900	Manufacturer ID	

7 Canceling or Returning an Order

In this chapter, you will learn how to:

- Cancel orders when possible.
- Return items when possible.

Canceling a BuyCarolina Order

BuyCarolina is an electronic business-to-business system. BuyCarolina orders are transmitted electronically every hour. 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 52 for additional details about finding and properly formatting PO numbers.

If a BuyCarolina order has not already been processed by the supplier and you need to cancel, follow these steps.

1. Contact the supplier(s) directly. For each supplier's contact information, visit the [BuyCarolina page](#) to search for the supplier contact under the Vendors tab.

Note: If your BuyCarolina PO contains items from multiple suppliers you must contact each supplier individually to cancel the order.

2. Once you have received confirmation of the cancellation from the supplier(s), email the confirmation to Procurement at eproviders@unc.edu.

Result: Procurement Services manually relieves the encumbrance in ConnectCarolina.

Returning a BuyCarolina Order

If a BuyCarolina order or item is not from Staples or Amazon is incorrect but has already been processed by the supplier(s), you will need to contact the supplier(s) to request a Return Merchandise Authorization (RMA).

Before contacting the supplier(s), locate the Purchase Order (PO) number of the order you would like to return. Requisition IDs are internal to UNCH 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 52 for more details on finding and properly formatting Purchase Order numbers.

To find the correct supplier contact, visit the [BuyCarolina page](#) to search for the supplier contact under the Vendors tab. The supplier will then process an electronic Credit Memo for the returned items. Not all suppliers accept returns and not all products are returnable. Check with the supplier directly to determine if an item is returnable.

Returning BuyCarolina Orders from Staples

Staples allows you to return items in two ways; using BuyCarolina or contacting Staples directly.

Returning Staples Order - 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. Also, 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 52.

Returning Staples Order - Through BuyCarolina

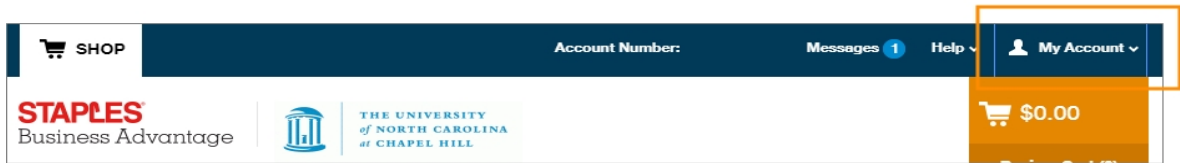
To return items from Staples through BuyCarolina, follow these steps:

1. From the Admin WorkCenter homepage in ConnectCarolina select **BuyCarolina** link from the Admin WorkCenter Links tile.
2. Click the **Staples Business Advantage** tile in the Additional Stores section.

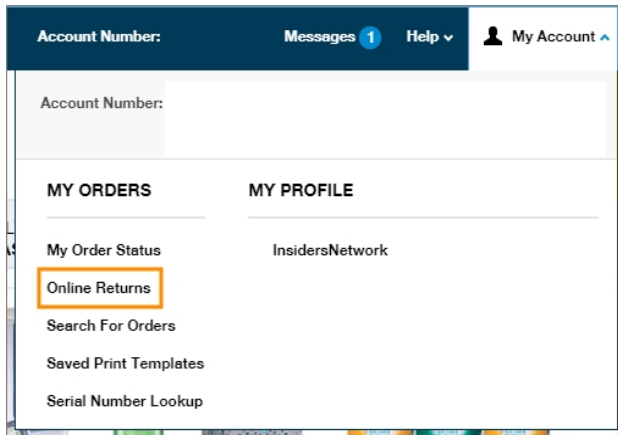
Result: The system shows the Staples BuyCarolina page.

7 Canceling or Returning an Order

3. Click on the **My Account** button to expand options.



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



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

Online Returns

[Click here to see order status definitions](#)

Items 1 - 5 of 5
<< | 1 | >>

Order Number	PO Number	Return Status	Order Date	Order Method	Order Total	Quantity Ordered	Return Items
171683656	UNCCH.2000364741	Shipped Track Order	01/09/2019	Online	\$158.67	10	Return Items
171302748	UNCCH.2000362351	Shipped Track Order	12/20/2018	Online	\$53.58	3	Return Items
171153338	UNCCH.2000360823	Shipped Track Order	12/14/2018	Online	\$265.23	5	Return Items

6. Enter the on-site contact information for the return. Enter any notes about the pick-up location or box location in the comments field.

ORDER NUMBER: 171683656

Shipped

BACK TO MY ORDERS

ORDER DETAILS

Status: SHIPPED
Ordered By: none
Order Date: 01/09/2019

PICK UP LOCATION

none
211 MANNING DR
ITS MANNING
RTE 1P RM 1201
CHAPEL HILL, NC 27514
USA

ACCOUNTING INFORMATION

Budget Center: UNCCH.2000364741
PO: UNCCH.2000364741

PAYMENT INFORMATION

Merchandise Total: \$ 158.67
Total: \$ 158.67

ACCOUNT NUMBER: 1010340ATL

First name:

Last name: none

Phone Number:

Comments:



1. Enter the quantity to be returned.
2. Select a Reason For Return from the drop down.
3. Enter the Number of return boxes Staples will pick up.
4. Click Submit Return.

Submit Return

Result: Additional data entry options will become available.

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

Items In Your Order

Item Description	Price Each	Available to return	Quantity To Return	Reason For Return
<div><div>Clorox® Disinfecting Wipes, Fresh Scent and Citrus Blend™, 75 Count Canister, 3 Canisters Per Value Pack (30208) Item Number:1949018 MFR Number: 30208 Customer ID:1949018 </div></div>	\$ 14.41	8	<div>0</div> <div>Return Reason</div>	

8. Enter the number of boxes Staples should expect to pick up.

1

0

Return Reason

Enter the Number of return boxes Staples will pick up:

1

Submit Return

9. Click the **Submit Return** button.

Returning BuyCarolina Orders from Amazon Business

To return an item, you must be logged into Amazon Business through ConnectCarolina's BuyCarolina.

1. From the Admin WorkCenter homepage in ConnectCarolina select **BuyCarolina** link from the Admin WorkCenter Links tile.
2. Click the **Amazon Business** tile in the Additional Stores section.

Result: The sytem shows Amazon Business BuyCarolina page.

3. Navigate to **"Your Orders"** to view your complete order history.
4. Select **Return or Replace** items at the right of the product.
5. Select the reason for the return.
6. Print the return label and authorization for the package.

BuyCarolina Appendix

In the appendix, you find these helpful resources:

- Links to additional training and resources related to BuyCarolina.
- Requester Preferences Field guide.

Additional Resources and Learning Opportunities

Chartfields

Chartfield Guide <https://ccinfo.unc.edu/files/2014/05/Chartfield-QRC.pdf>

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>

General Purchasing Resources

Making Purchases page on CCINFO - <https://ccinfo.unc.edu/making-purchases>

Amazon

Amazon Business Ordering FAQs - <https://finance.unc.edu/files/2019/01/UNC-Chapel-Hill-Amazon-Business-FAQ-Guide.pdf>

Airgas and ARC3 Resources

Airgas Cylinder Purchase and Return - <https://finance.unc.edu/files/2018/11/Airgas.pdf>

ARC3 Cylinder Purchase and Return - <https://finance.unc.edu/files/2018/11/ARC3.pdf>

Requester Preferences Field Guide

Required Fields

In this field:	Do the following:
Location Set ID	Before entering any default information, enter either UNCCH or UNCGA in this field.
Ship To	<p>Enter the ship to address or follow the steps below to search for the appropriate address:</p> <ol style="list-style-type: none"> Click the Lookup (magnifying glass) icon. <p>Result: The system displays the first 300 ship to addresses.</p> <ol style="list-style-type: none"> In the Description field, change “begins with” to “contains.” Type a word or two to describe your location and click Look Up. Click the link for the ship to address you need.
Location	<p>Enter your location or follow the steps below to search for your location:</p> <ol style="list-style-type: none"> Click the Lookup (magnifying glass) icon. <p>Result: The system displays the first 300 addresses.</p> <ol style="list-style-type: none"> In the Description field, change “begins with” to “contains.” Type a word or two to describe your location and click Look Up. 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

In this field:	Do the following:
Fund	<p>Look up, or enter, the fund code.</p> <p>A Fund chartfield is a single 5-digit code capturing both major fund group (first 3 digits) and purpose (final 2 digits).</p>

In this field:	Do the following:
Source	<p>Look up, or enter, the source. The Source is a 5-digit chartfield indicating the specific source that is supporting your transaction.</p> <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>
Account	<p>Leave this field blank. The account value defaults based on the category code chosen on the requisition, or from the supplier's website, though you can change it.</p>
Program	<p>Look up, or enter, the program.</p> <p>Note: The Program chartfield is used by certain areas such as the College of Arts & Sciences and various professional schools to capture programmatic information.</p>
Cost Code 1	<p>Look up, or enter, cost code 1.</p> <p>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.</p>
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.