



## The Source NC E-Procurement Newsletter

May 2018 Edition

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### End of Year: Closing Outstanding Purchase Orders

As your accounts payable department prepares for the year end by closing outstanding purchase orders, remind them to take advantage of the option to **not** transmit changes to the supplier when changing a purchase order. This feature helps to avoid duplicate shipments. When making a change that does not need to go to the supplier, a prompt appears asking the user if they would like to transmit the change to the supplier. Select '**No**' to have the change order sent to NC E-Procurement but **not** to the supplier.

**Note:** You may receive email confirmation from the NC E-Procurement Service after the change order has been successfully imported, but it will state that the purchase order has not been transmitted to the supplier.

### Tips & Tricks: Selecting the Correct Location for Vendors on Line Items

When creating a line item within NC E-Procurement, consider the location for the vendor you are selecting. Sometimes vendors have multiple locations, and either the closest location or the location that provides the good or service you are purchasing must be selected. Follow the instructions below for selecting a vendor location.

1. Check the box next to the line item to be updated and click '**Edit.**'

**Note:** If you need to update the same vendor location for multiple line items, use the Mass Edit feature by clicking the checkbox next to each line item that needs to be updated before clicking '**Edit.**'

The screenshot shows a web interface for a requisition. At the top, it says "AQ21287333: Unfilled Requisition" and "Review your requisition, make changes as necessary, and submit the request for approval." Below this are tabs for "Summary" and "Approval Flow". The "Title" field contains "Select Vendor Location". The "On Behalf Of" field shows "SEA 1270 Employee 11". There is a "My Labels" section with a "Add Label..." button. The main area is a table of "Line Items" with columns for "No.", "Type", "Description", "Supplier Part Number", "Qty", "Unit", "Tax", "Other", "Price", and "Amount". One line item is visible: "1 62ML Printer Cartridge" with a quantity of 1, unit of "each", and a price of \$0.00. Below the line item are buttons for "Add", "Check", "Delete", "Add from Catalog...", and "Add Non-Catalog Item...". At the bottom right, it shows "Total Cost: \$0.0000" and an "Update" button.

2. Click the '**select**' link next to the '**Location**' field.

RQ21257493: Select Vendor Location  
 This is a summary of the item you selected. Change any editable field and save your changes.

**LINE ITEM DETAILS**

No.: 1  
 Description: 830 Printer Cartridge  
 Qty: 1  
 UOM: each  
 Commodity Code: 202-72 - Printer Access  
 Amount: \$0.00000 USD  
 Price: \$0.00 USD  
 Tax Rate: Other  
 Tax Amount: \$0.00 USD  
 Other Costs: \$0.00 USD  
 Supplier: SYSTEL BUSINESS EQUI  
 Location: SYSTEL BUSINESS EQUIPMENT CO. [ select ]  
 Supplier Part Number:  
 Recycled Content?  Yes  No  
 Item Classification: Good

3. Select the correct vendor location based on proximity to your location or based on the products and services offered by the vendor at that location.

**Note:** If unsure whether a location offers the product or service you are purchasing, [Searching for Registered Vendors Web Based Training](#) provides more information on how to execute a search to locate this information.

**Choose Value for Location**

Field: Name [ ] Search

| Name ↑                        | Lines        | City    | State | Country       |        |
|-------------------------------|--------------|---------|-------|---------------|--------|
| SYSTEL - ASHEVILLE            | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL BUSINESS EQUIPMENT CO. | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL - CHARLOTTE            | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL - GREENSBORO           | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL - GREENVILLE           | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL - HICKORY              | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL - RALEIGH              | 123 Main St. | Anytown | NC    | United States | Select |
| SYSTEL - WILMINGTON           | 123 Main St. | Anytown | NC    | United States | Select |

Done

**Note:** If further guidance is needed, please refer to the [EPLite Editing Line Item\(s\) Job Aid](#).

For additional assistance, please contact the NC E-Procurement Help Desk at 888-211-7440, option 1, or by email at [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov).

#### **Follow-Up**

This newsletter was sent to K-12 school system users utilizing LINQ.

*Questions about information covered in this newsletter?* Send an email to [ephelpdesk@its.nc.gov](mailto:ephelpdesk@its.nc.gov).