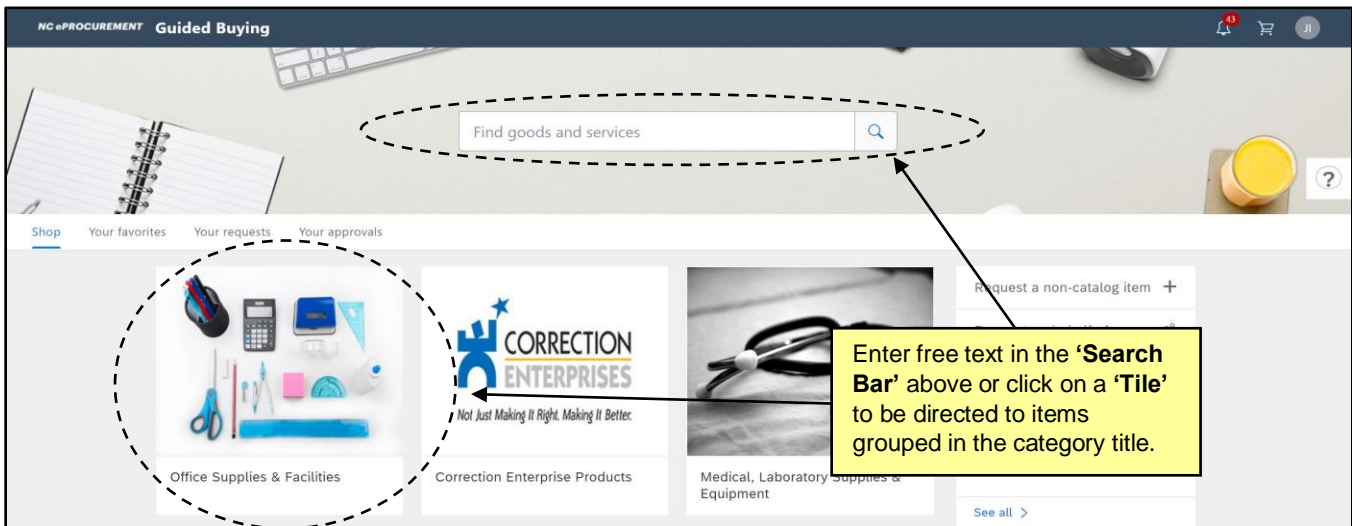# NC eProcurement
Creating Purchase Requisitions: Guided Buying

This process guide provides instruction on the functional steps to create a Purchase Requisition (PR) in the Guided Buying view of NC eProcurement. A PR is a request to buy goods or services that is created electronically using the Ariba on Demand purchasing system.
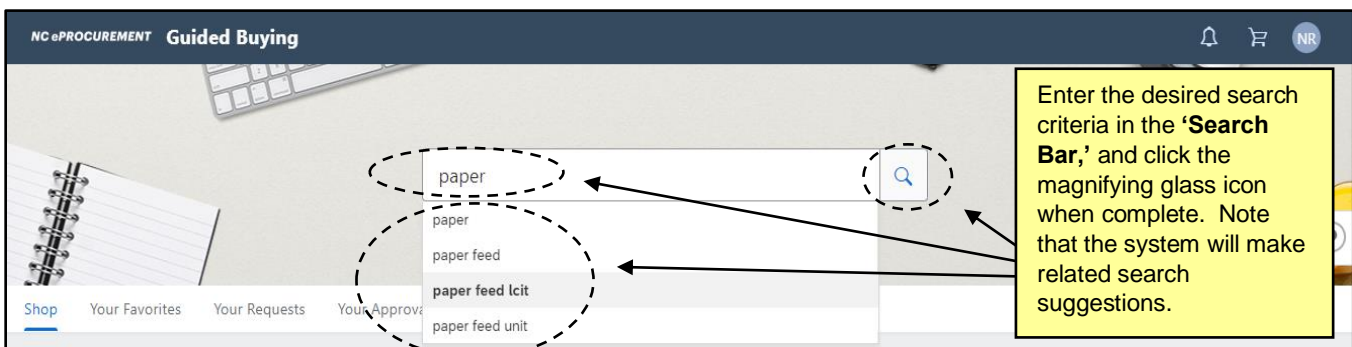
I. Adding Catalog Items

If an item appears in the NC eProcurement catalogs, it is on a Statewide Term Contract (STC) negotiated on behalf of the State of North Carolina's buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their PR by utilizing the catalog search functionality.

1. There is no need to initiate a PR in Guided Buying; users just need to search for the item(s) being purchased and add them to the shopping cart. Catalog items can be searched for by using the **'Search Bar'** or **'Tiles.'**

Enter free text in the **'Search Bar'** above or click on a **'Tile'** to be directed to items grouped in the category title.

2. If using the **'Search Bar,'** enter the desired search criteria (i.e., **'Keyword,' 'Supplier Part #,' 'Manufacturer,' 'Statewide Contract ID,'** or **'Category'**) and click the magnifying glass or press **'Enter.'**

Note: The **'Search Bar'** will suggest results based on what's been entered before the search is complete and has a "fuzzy" nature to it, meaning that the system will attempt to return results that sound like the entered search criteria, not just match the results to the exact text of the search.
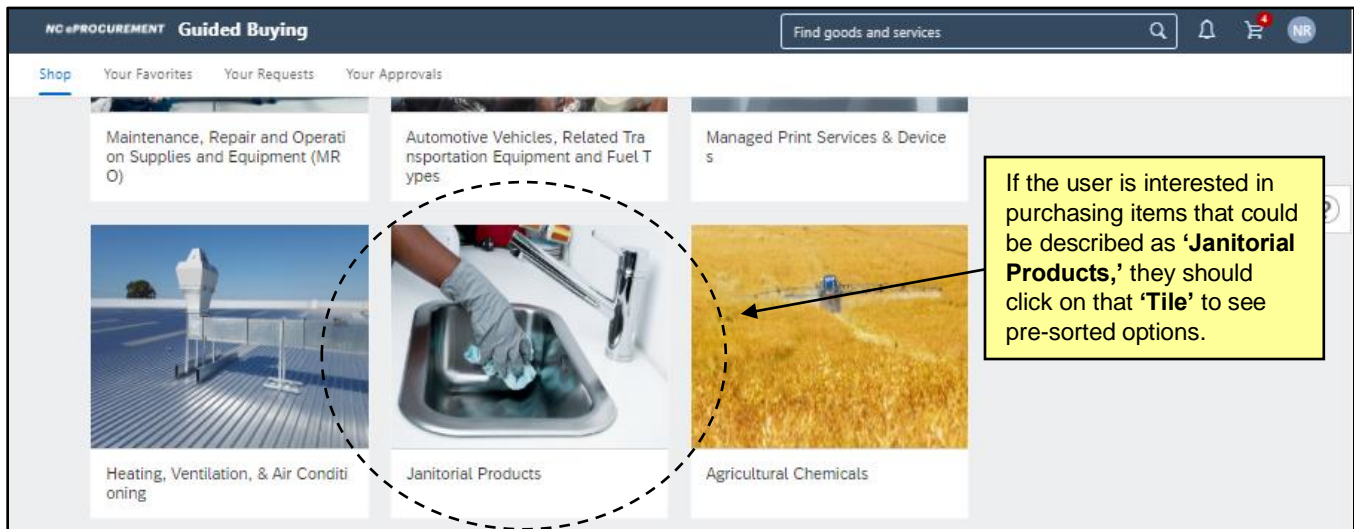

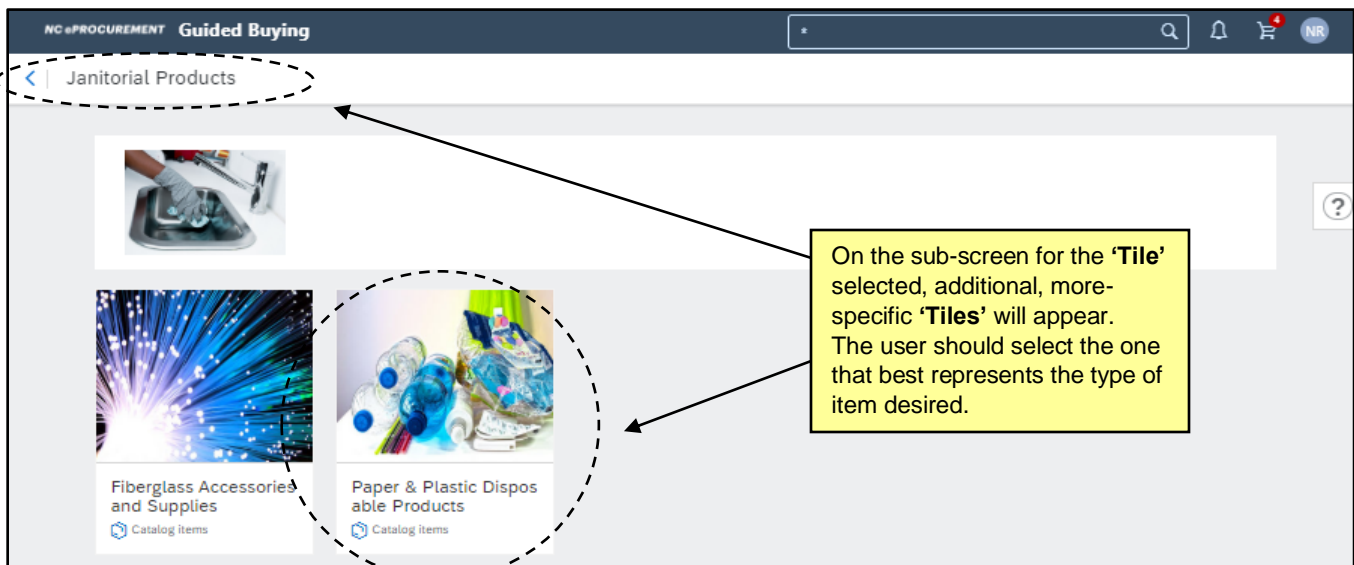Enter the desired search criteria in the **'Search Bar,'** and click the magnifying glass icon when complete. Note that the system will make related search suggestions.

3. If beginning a search via **'Tiles,'** click on the **'Tile'** that best represents the type of item desired.

> If the user is interested in purchasing items that could be described as **'Janitorial Products,'** they should click on that **'Tile'** to see pre-sorted options.

4. A sub-screen will appear with additional, more-specific **'Tiles'** to direct the purchase. Click on the one that, again, best represents the type of item desired.

> On the sub-screen for the **'Tile'** selected, additional, more-specific **'Tiles'** will appear. The user should select the one that best represents the type of item desired.

5. After conducting the search, the results page will be displayed. It will provide further options for refining the search and evaluating the results.

6. The **'Refine Results'** panel on the left will provide options to allow users to refine results. Those options will automatically appear and are dependent on the search results. Select an option from this menu to see only those results matching the specified criteria. The possible fields include **'Supplier,'** **'Manufacturer,'** **'Category,'** **'Keyword,'** or **'Price,'** and the subsequent number displays the amount of options that will display if the box next to the suggestion is checked.

7. Clicking the drop-down next to **'Sort By'** allows users to sort the search results based on **'Relevance,'** **'Price high to low,'** or **'Price low to high.'**

   a. **'Relevance'** places the items with the best or most complete match near the top.

   b. **'Price high to low'** places the most expensive items closer to the top.

   c. **'Price low to high'** places the least expensive items closer to the top.

8. Click the blue left-arrow next to **'Search Results'** to return to the previous page of results or click on **'NC eProcurement'** in the top left of the screen to reset the search results altogether.

9. A maximum of eight catalog items will display on the results page. To unveil more results, click on **'More'** beneath the last result.
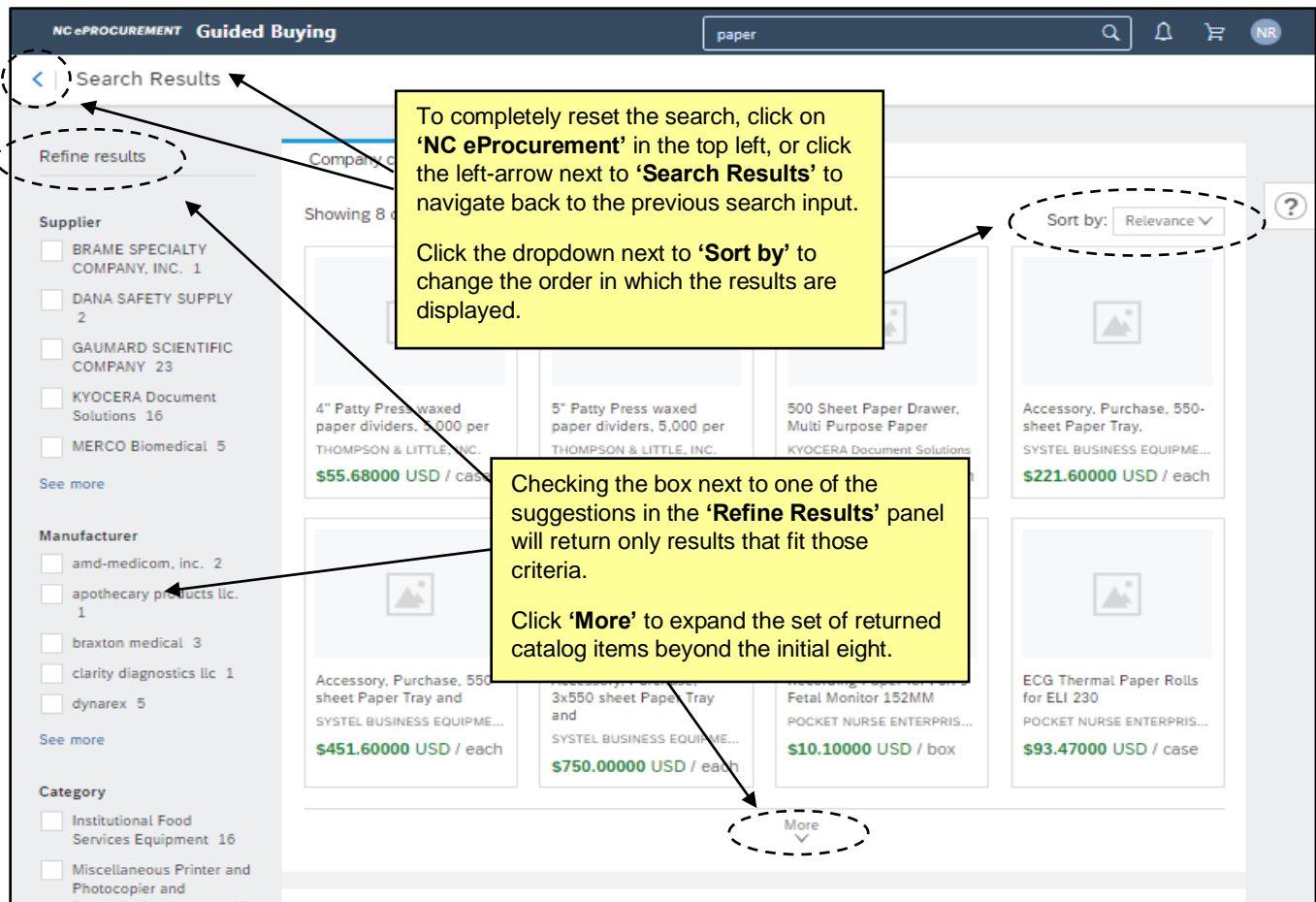

10. Each catalog item on the results page will provide a description of the item, the supplier of the item, the price of the item, and the unit of measure for the item.

   Note: Suppliers can provide pictures for their catalog items, but not all items will have a picture.

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V'
QUOTE PUNCHOUT CATALOG
L PURCHASE ORDER
SOURCING
BIDDING
BUY

11. If the user hovers their cursor over a catalog item, it will be surrounded by an expanded blue rectangle with an option to select the quantity desired and click the **'Add to cart'** button.
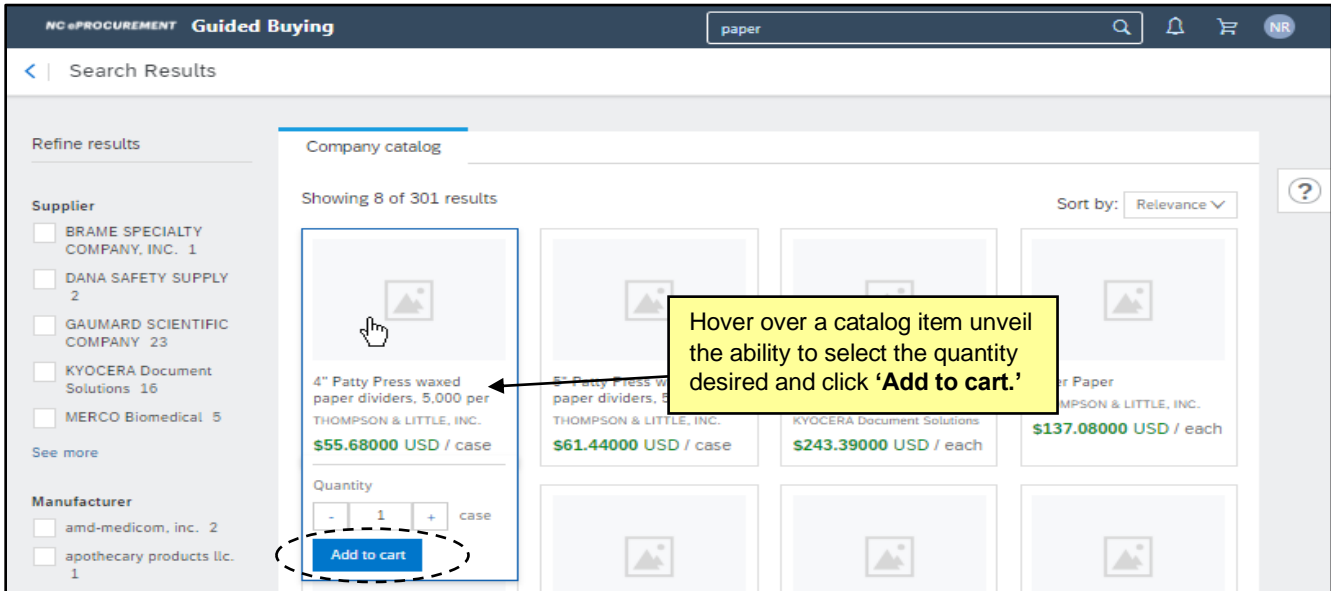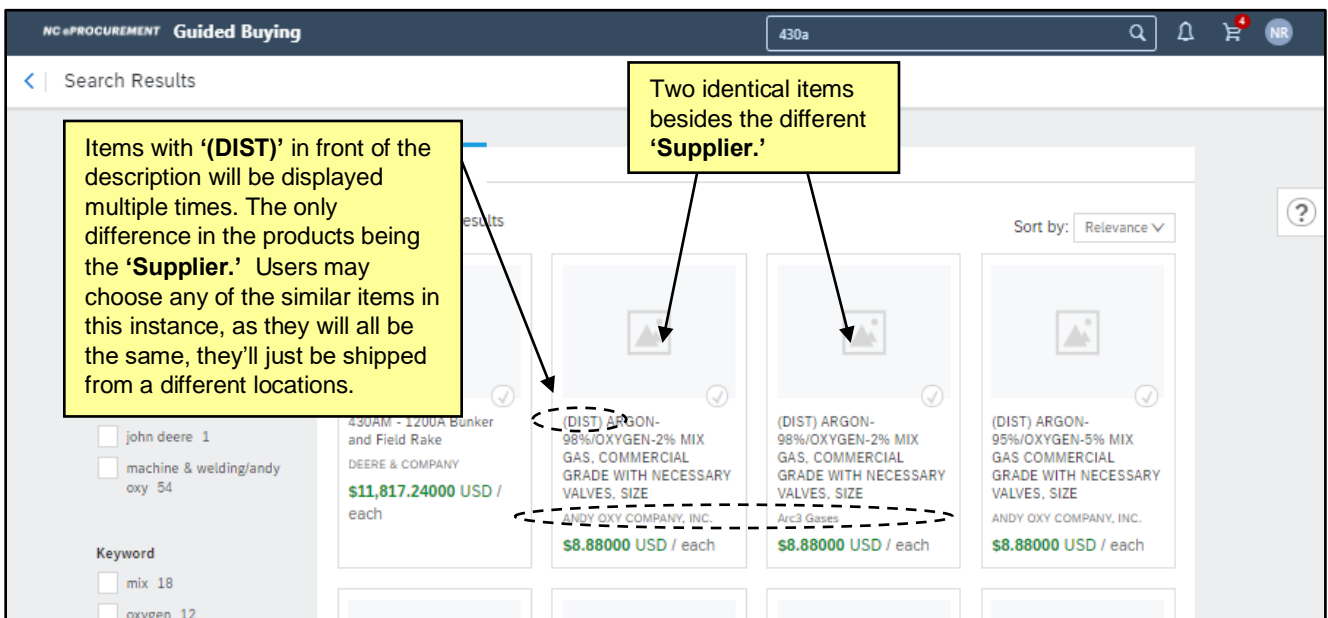

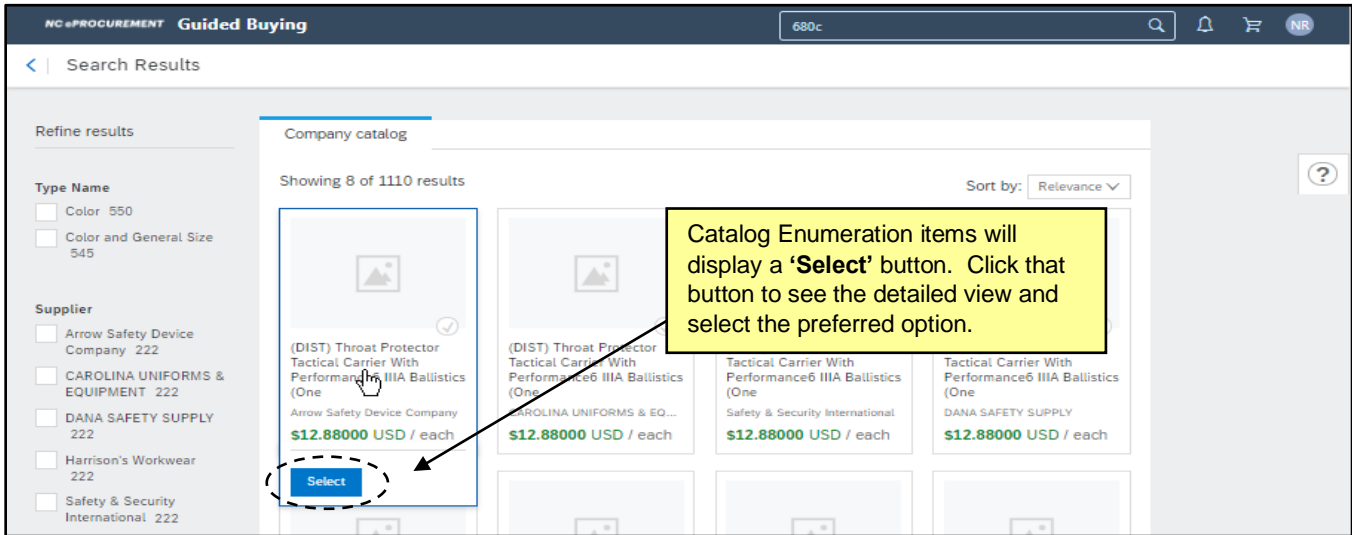12. For more information about the item, click on it to display a detailed view.
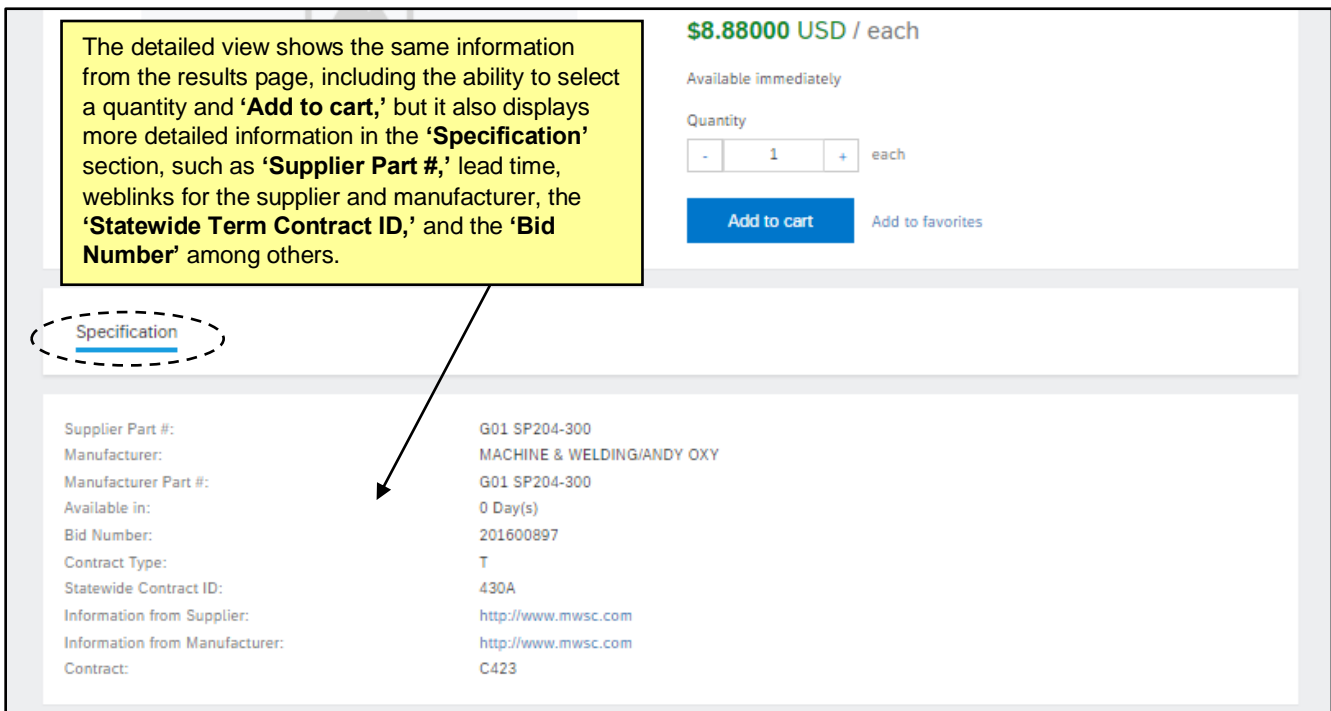
13. Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of **'$0.00000 USD'** and will contain the necessary steps in the item description. Users should refer to those instructions when adding this type of item to their PR.


Items with a price of **'$0.00000 USD'** will contain additional ordering instructions in the item description.
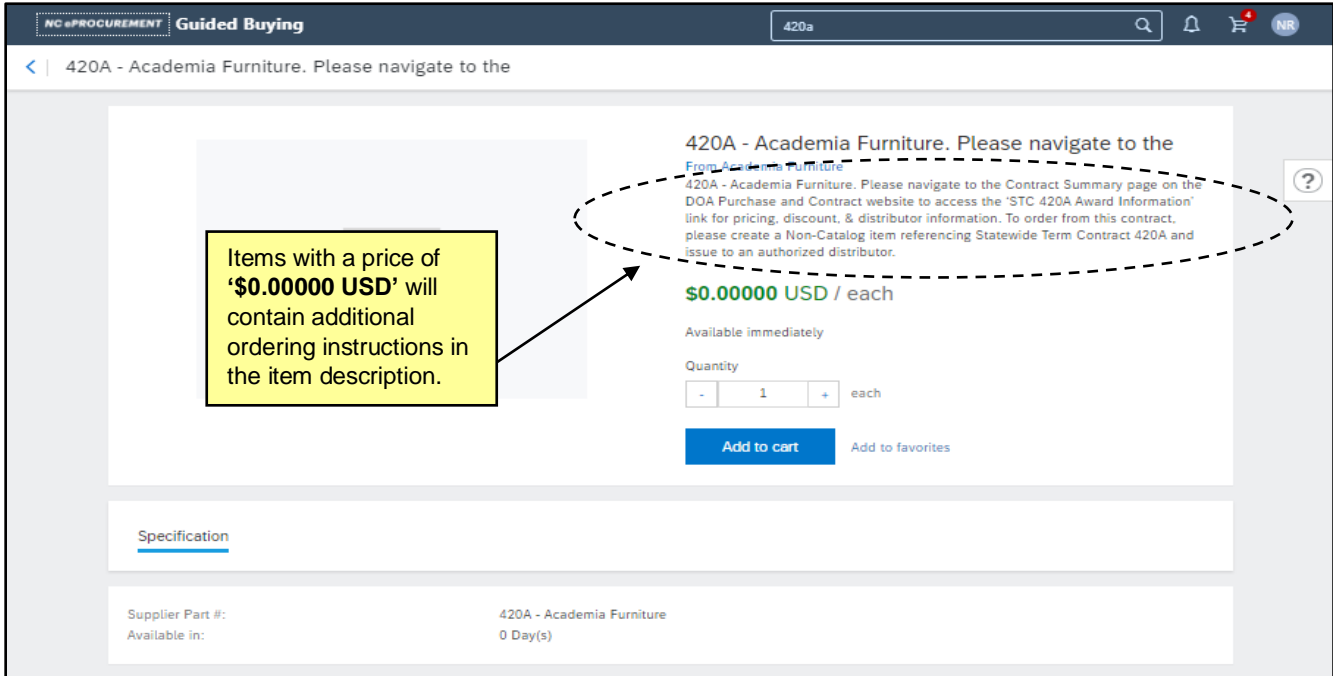
14. Items with **'(DIST)'** in front of their description indicate that the item is supplied by a distributor, not necessarily the STC vendor. Multiple seemingly identical catalog items will appear for the same product, but they will have different suppliers listed. The user may choose any of the items as they are the same, but they will be delivered from a different location. In essence, the user will be choosing based on the **'Supplier'** listed, perhaps taking proximity to the distributors' locations into account.

Items with **'(DIST)'** in front of the description will be displayed multiple times. The only difference in the products being the **'Supplier.'** Users may choose any of the similar items in this instance, as they will all be the same, they'll just be shipped from a different locations.

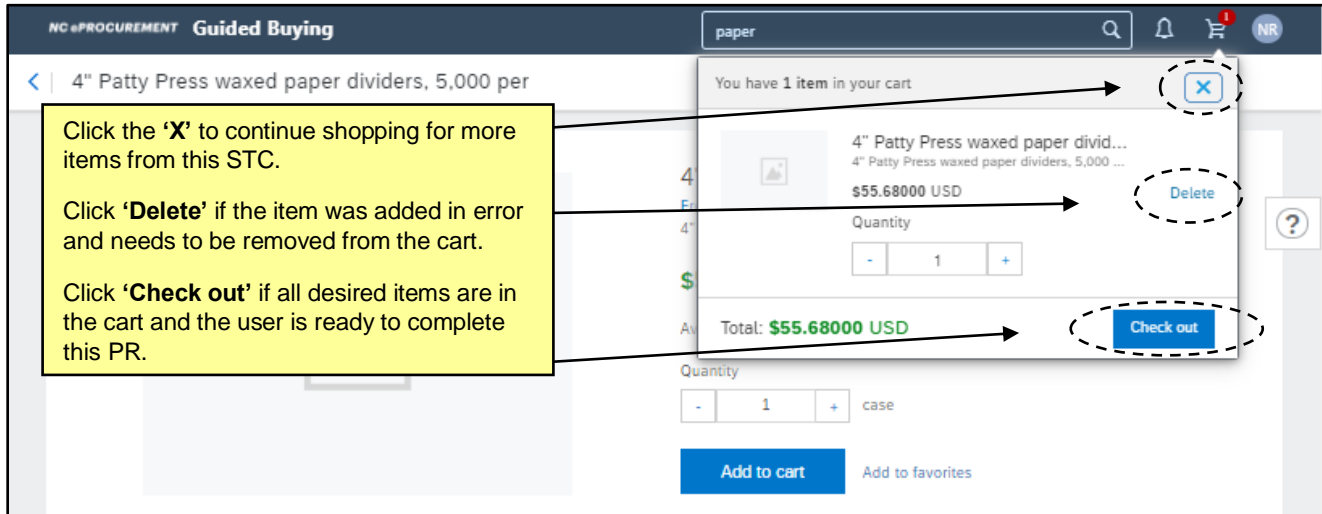Two identical items besides the different **'Supplier.'**

15. Enumerations are STC items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the Purchase Requisition (e.g., size, color, delivery options). When an Enumeration item is returned in a search, the user will not have the option to **'Add to cart,'** but rather to '**Select.'** On the subsequent item details page, the system will display the options for the user to choose. The user will need to select the preferred option before clicking **'Add to cart.'**

Catalog Enumeration items will display a **'Select'** button. Click that button to see the detailed view and select the preferred option.

16. Within the detailed view, select the preferred option (in this case **'Color'**). A blue border will surround the selection. The user can now click **'Add to cart'** without receiving an error message.


A blue box will surround the selected preferred option, and the **'Add to cart'** button will be clickable.
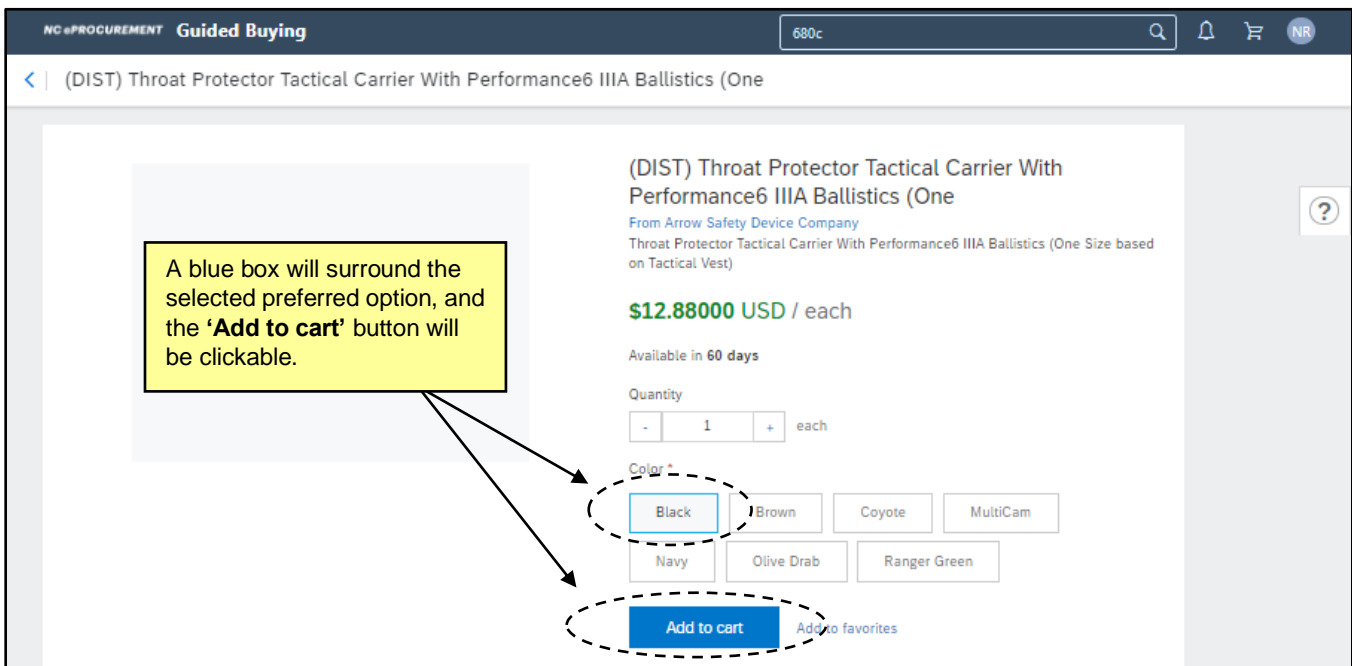
17. If a user finds the desired item and clicks **'Add to cart'** (from either the results page or the detailed view), a red bubble indicating the number of items they have in their cart will display above the shopping cart icon in the upper right. A drop-down box will give the user an opportunity to **'Check out'** and complete the purchase if that is the only item intended for inclusion on this PR, or the user can click the **'X'** to continue shopping for another item on this particular STC, or click **'Delete'** if the item was added in error.

Click the **'X'** to continue shopping for more items from this STC.

Click **'Delete'** if the item was added in error and needs to be removed from the cart.

Click **'Check out'** if all desired items are in the cart and the user is ready to complete this PR.

18. If multiple items are added to the cart, it will be reflected in the red bubble above the shopping cart icon and in the drop-down box. By clicking '**Check out'** at this point, all items listed will be added to the PR.

Notes:

- If the user does not click **'Check out'** at this point, the items will remain in the cart until they are either deleted or the user clicks **'Check out'** at a later time.

- Multiple catalog items can be added to the same PR, but they have to be from the same STC. The system will prevent items from more than one STC to be included on the same PR, and the user will be notified with an error message. For this reason, a **'Non-catalog item'** cannot be added to a PR with a catalog item already on it.

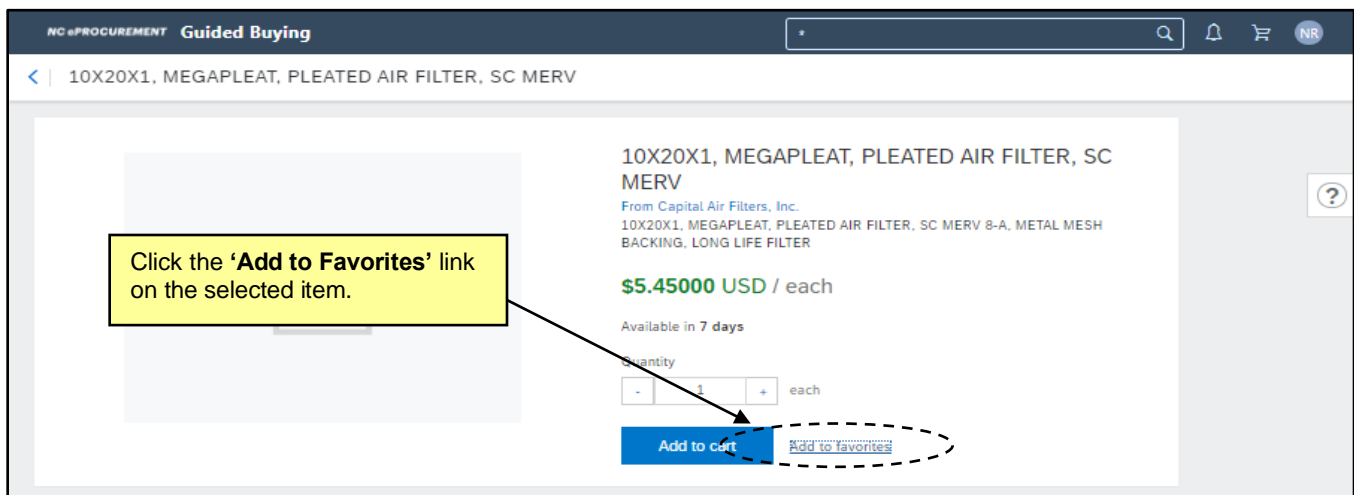Two different places will notify the user as to how many items are in their cart.
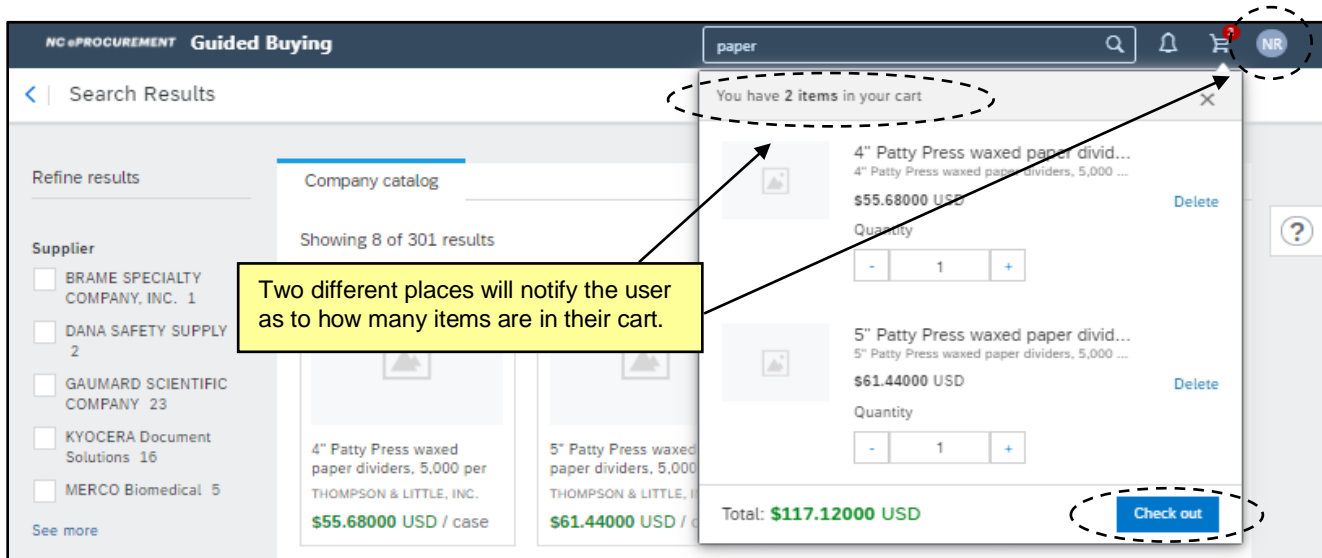
II. Adding Catalog Item Favorites

Users may add specific Statewide Term Contract (STC) items to a favorites list for quick reference. Catalog items saved as favorites are updated as the catalog item is updated (e.g., price, description). To utilize catalog Favorites, users must first define **'Favorites Lists.'** Specific catalog items can then be added to a defined Favorites List.

> **Note: 'Favorite Items'** from Expert View do not carry over into Guided Buying and vice versa.

1. To define a **'Favorites List,'** execute a catalog search for the desired item.

2. Click the **'Add to Favorites'** link.

3. The **'Favorites'** popup will display. Click **'Create new list,'** type the name of the list, and click **'Done.'** The item will be added to that list.
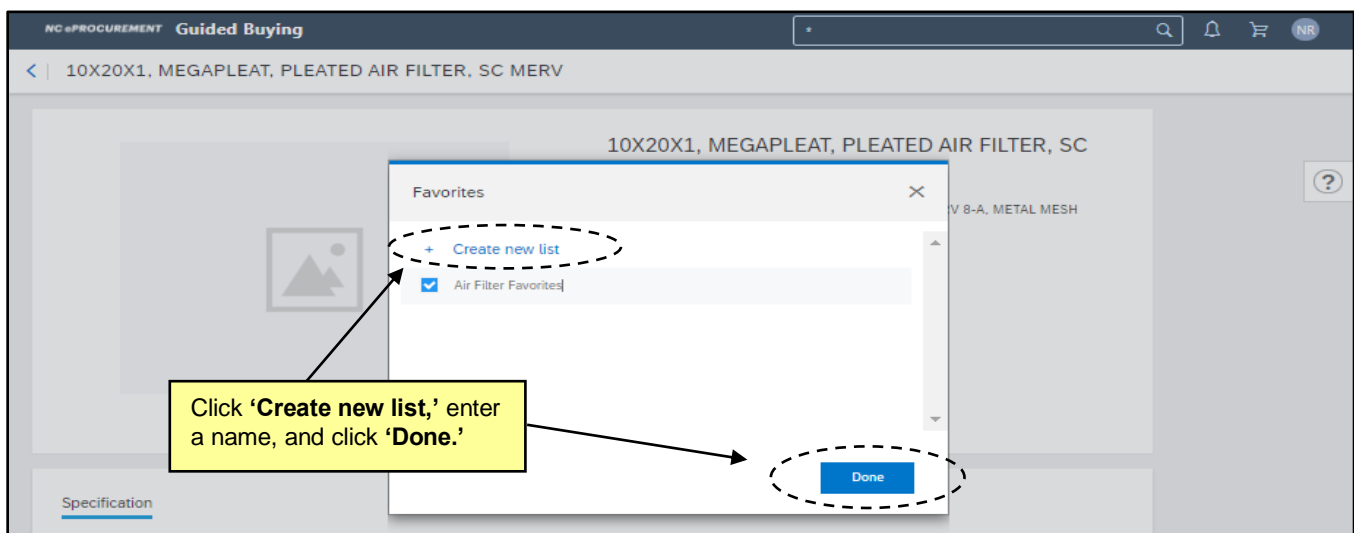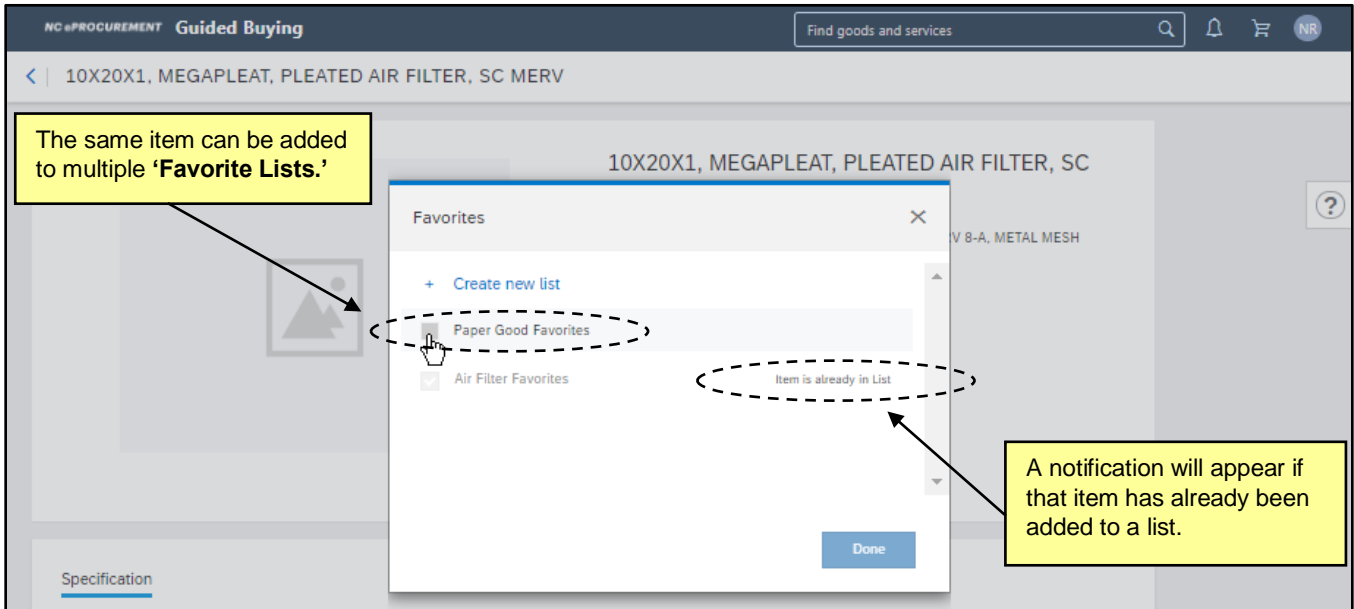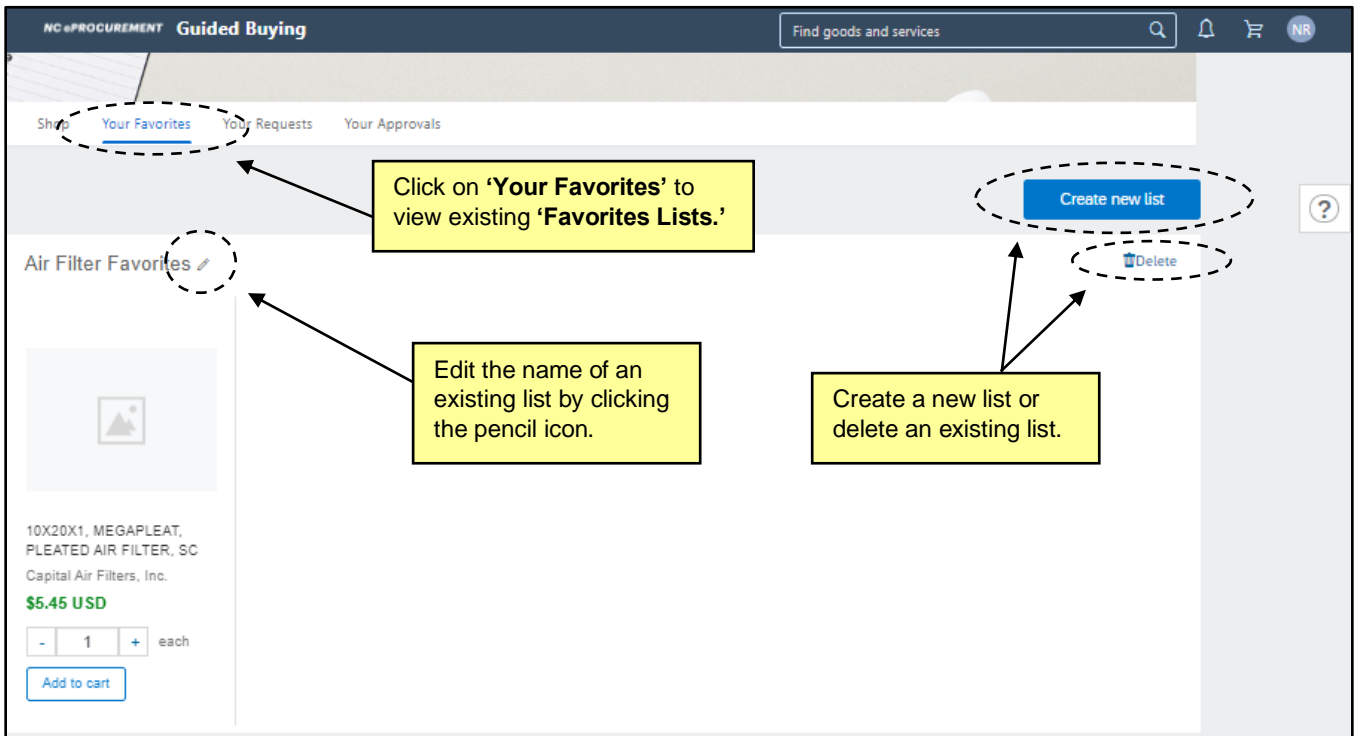
4. The same item may be added to multiple lists by checking the box next to each list and clicking the **'Done'** button. If the item already exists in a list, the user will receive a notification that the **'Item is already in List'** and that list will be unable to select.

The same item can be added to multiple **'Favorite Lists.'**

A notification will appear if that item has already been added to a list.

5. Users can manage their **'Favorites Lists'** by clicking on **'Your Favorites'** near the top of the page. New lists can be added from this page by clicking **'Create new list,'** the names of existing lists can be edited by clicking the pencil icon, or lists can be permanently deleted by clicking on **'Delete'** in the top right of each list.

Click on **'Your Favorites'** to view existing **'Favorites Lists.'**

Edit the name of an existing list by clicking the pencil icon.

Create a new list or delete an existing list.

6. Add an item from a **'Favorites List'** to the cart by clicking **'Add to cart,'** or delete the item from the list by clicking the **'X'** in the top right corner of the item. A confirmation screen will appear asking the user if they are sure they wish to remove the item from the list, to which they can click **'Yes'** or **'Cancel.'**

Add the item to the **'Shopping Cart'** by clicking **'Add to cart,'** or remove it from the **'Favorites List'** by clicking the **'X'** in the top right.
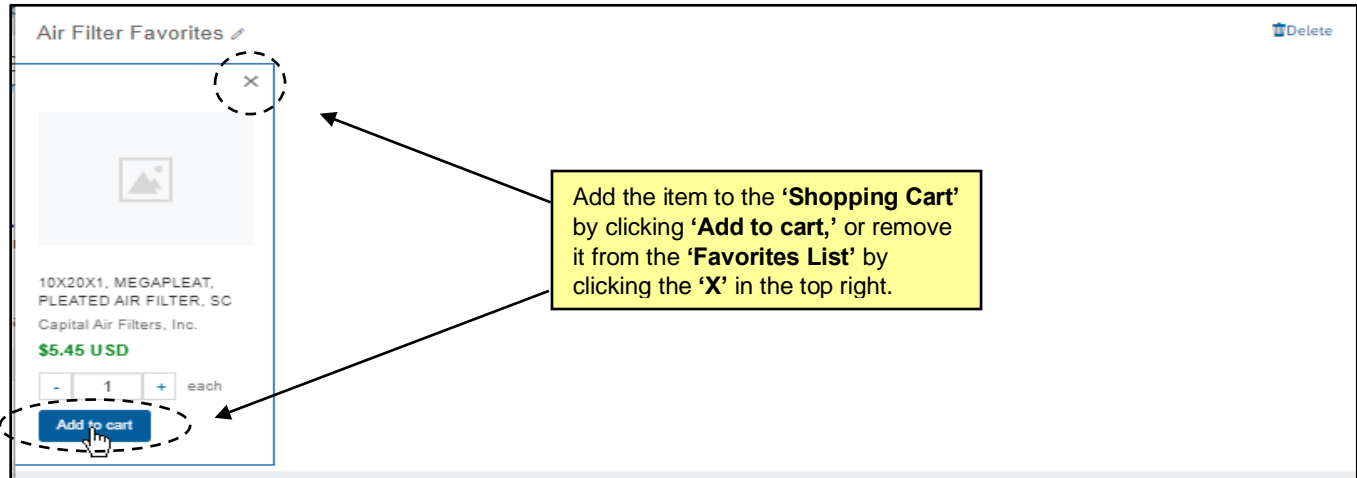
III. Adding Punchout Catalog Items

Some State of North Carolina Statewide Term Contract (STC) suppliers have created punchout websites containing negotiated term contract items. These punchout sites are accessible through the NC eProcurement term contract catalogs. A punchout site is a website created and maintained by the supplier specifically for the State of North Carolina. Users do not need to enter a new user ID or password to enter the supplier's punchout site. The supplier's website will automatically recognize users from NC eProcurement, and after the buyer has selected items on the supplier's website, the items are automatically transferred into NC eProcurement as line items on the Purchase Requisition (PR). Once completed, the purchase order will be delivered to the supplier through NC eProcurement.

1. There is no need to initiate a punchout catalog purchase in Guided Buying; users just need to search for the item(s) they would like to buy and add them to their shopping cart. Catalog items can be searched for by using the **'Search Bar'** or **'Tiles.'**
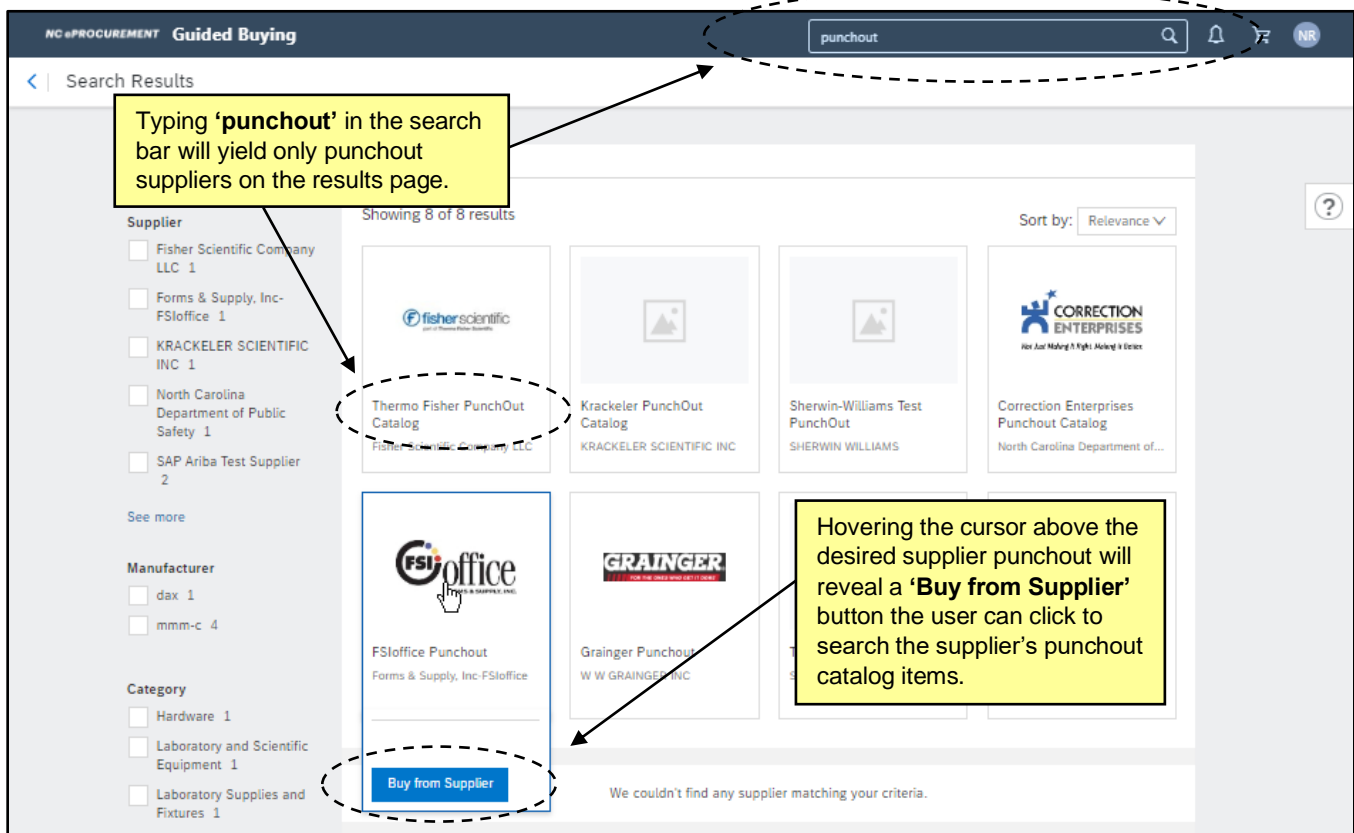

Enter free text in the **'Search Bar'** above, or click on a **'Tile'** to be directed to items grouped in the category title.
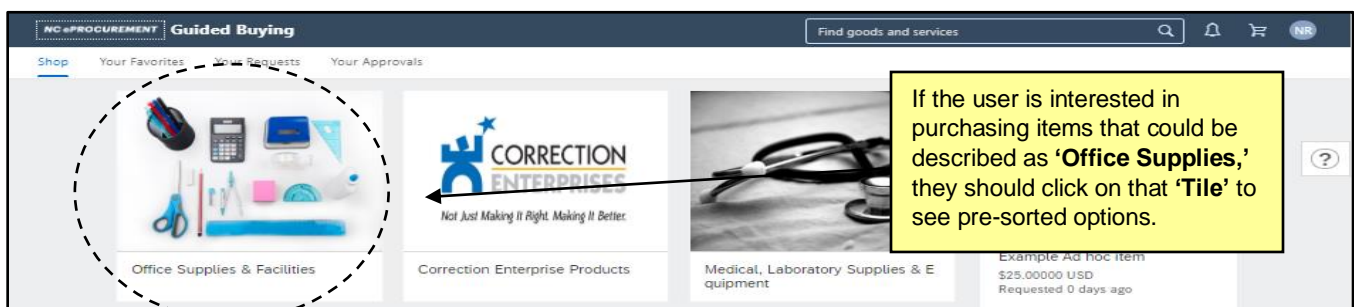
2. If using the **'Search Bar,'** enter the desired search criteria and click the magnifying glass or press **'Enter.'**

   Note: Searches by **'Category'** (ex: Office Supplies), **'Supplier'** (ex: FSI), or **'Statewide Contract ID'** (ex: 615A) will return results that may lead the user to a punchout catalog. Alternatively, if the user enters the keyword **'Punchout'** in the **'Search Bar,'** the only results returned will be links to punchout catalog sites.

3. Punchout catalog results will not show individual items with prices like standard catalog items. A tile with the supplier's name followed by **'PunchOut Catalog'** will display for every available punchout catalog.

4. If the user hovers their cursor over the punchout catalog tile they wish to purchase from, it will be surrounded by an expanded blue rectangle and an option to click **'Buy from Supplier'** which will take the user to the supplier's punchout catalog.

5. If beginning a search via **'Tiles,'** click on the **'Tile'** that best represents the type of item desired.
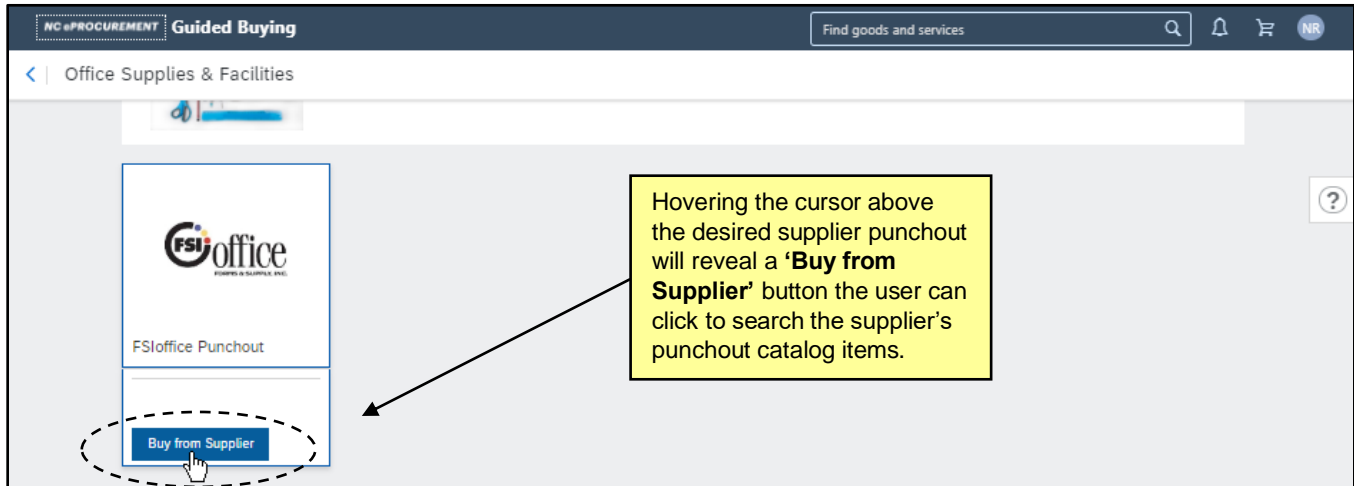
6. A sub-screen will appear with additional, more-specific **'Tiles'** to direct the purchase. If a punchout tile appears, hover the cursor above the tile and click **'Buy from Supplier'** to be taken to that supplier's punchout catalog.

7. The user will be directed to the supplier's punchout catalog site. The page will still be branded with **'NC eProcurement'** at the top, but the content of the site will be maintained by the supplier. Since the individual supplier creates their own punchout site, each site may differ in appearance and navigation; however, each site will have the same basic logic. When shopping on a punchout site, users will add the desired items to the shopping cart on that site, then click **'Submit'** to automatically send the selected items back to their **'NC eProcurement'** shopping cart.

   Note: If a buyer decides to end a punchout shopping session before any items are selected, they may return to the PR by clicking on **'Close Session.'**.
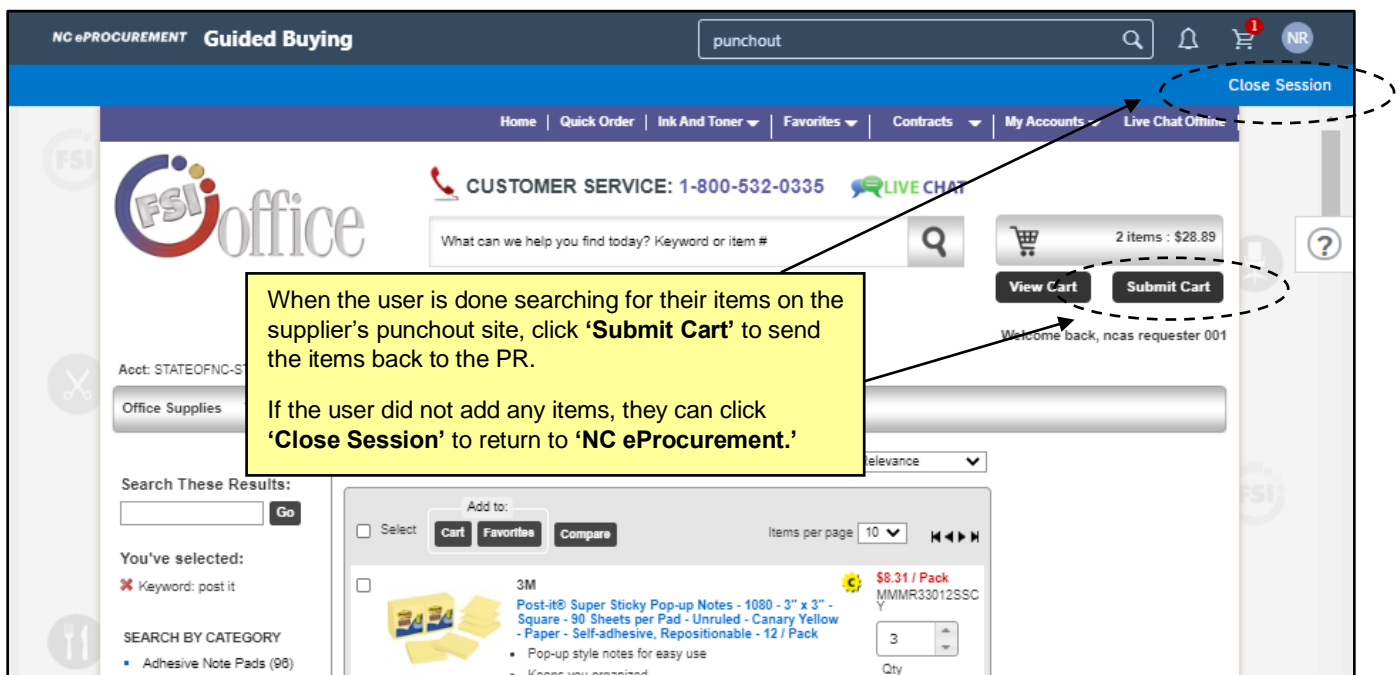
8. Once the punchout item(s) have been added to the PR, if there is a need to edit the quantity of the item or to add additional punchout items from that catalog, the user will have to make those edits back on the supplier's punchout catalog site and re-submit their cart. To access the site directly from the PR, click on the **'Description'** of any of the line items.

Click the item **'Description'** to return to the punchout catalog to edit or add items to the PR if necessary.
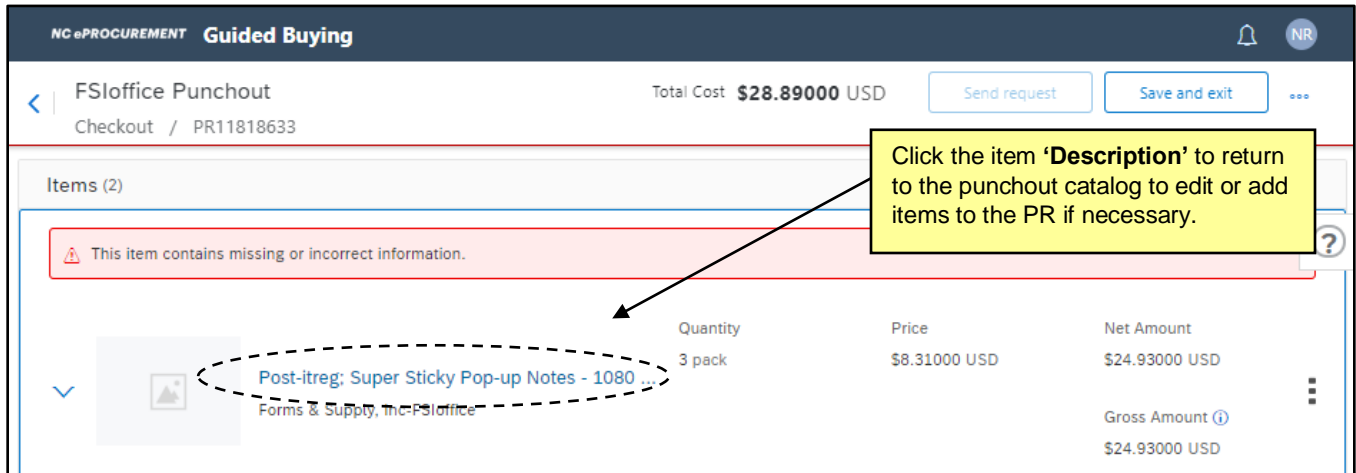
IV. Adding Non-Catalog Items

Users may manually add **'non-catalog'** items to a Purchase Requisition (PR) when a catalog item is not available or when they are ordering from a vendor that is not on a Statewide Term Contract (STC).

1. From the Guided Buying home page, click on **'Request non-catalog item'** to enter product information on the subsequent **'Non-catalog request'** page.

Click on **'Request non-catalog item'** to initiate the Purchase Requisition.
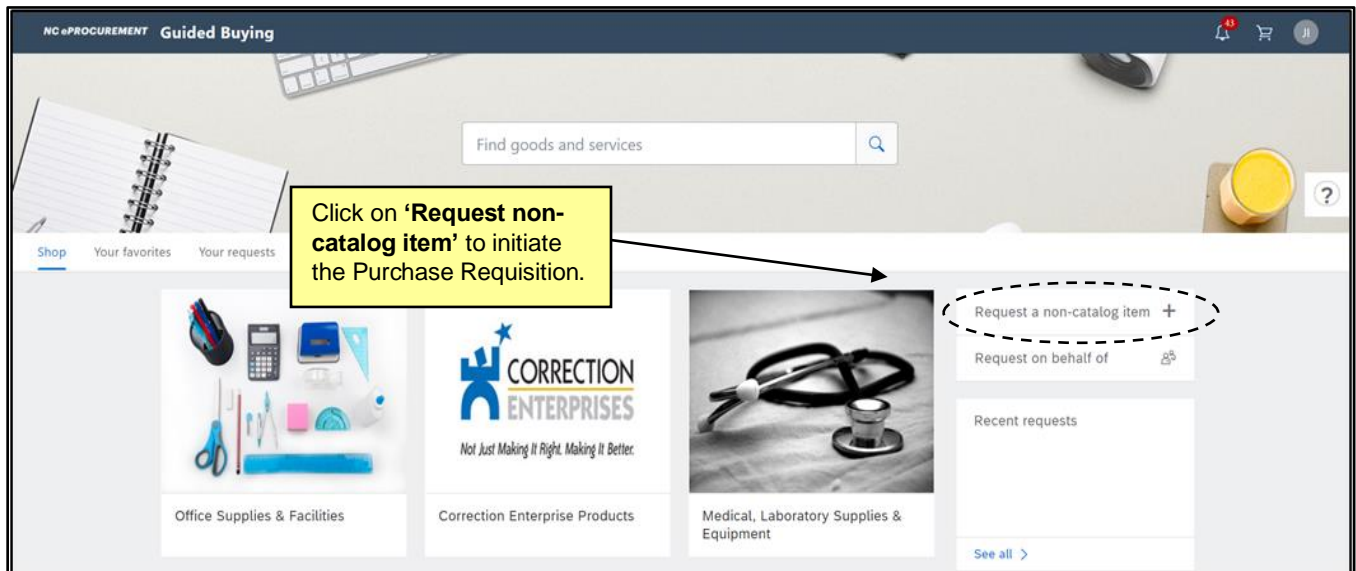
2. **Product name:** Enter a name for the item being requested.

3. **Category:** Locate the appropriate category that describes the item being purchased by using the drop-down menu. **'Category'** at this point translates to what is commonly referred to as a **'Commodity Code.'** If a desired category is not listed in the drop-down menu, select **'Browse all'** to search for the appropriate code. Users may search by category number or keyword.

   Notes:
   - It is important to select the appropriate **'Category'** as the State of North Carolina uses this for reporting purposes. The codes listed are part of the United Nations Standard Products and Services (UNSPSC) commodity code structure. Codes that begin with a '7,' '8,' or '9' describe service type categories. These codes should not be used when purchasing goods.

   - It is required that users enter a category out to the sixth digit. Adding a two or four -digit code will not be prohibited when selecting, but the user will receive an error on the **'Checkout'** page if the selection does not have six digits.

   - Please see the **'Selecting a UNSPSC Commodity Code'** job aid for further instructions.
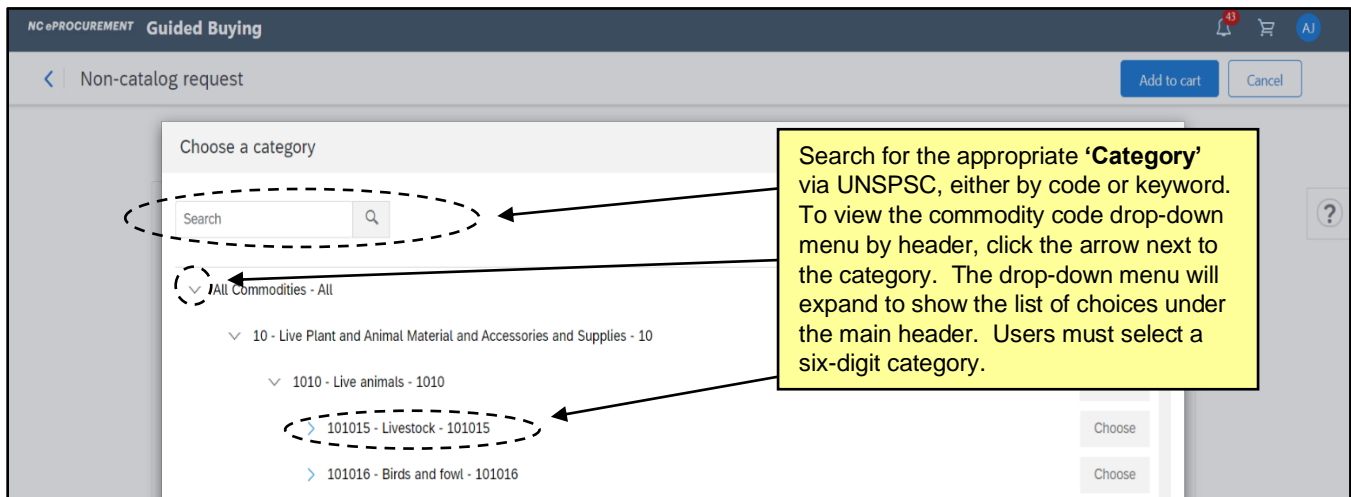
4. **Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., color, dimensions, etc).

5. **Quantity:** Enter the appropriate Quantity. Add or subtract from the quantity by using the **'+'** or **'-'** buttons to either side of the free-text field.

6. **Unit of Measure:** Locate the appropriate Unit of Measure in the drop-down menu if the default value of **'each'** is not correct. If the desired Unit of Measure is not listed in the drop-down menu, choose **'Browse all'** to find the appropriate value.

7. **Unit Price:** Enter the price of the item in USD.

8. **Supplier:** Locate the supplier from the selector by clicking **'View all suppliers.'** The **'Choose a supplier'** popup will display. Suppliers will be organized by ascending **'Supplier ID'** number, or the user can enter part of the supplier's **'Name,' 'Address,' 'City,' 'State,'** or **'Country'** in the search bar to return filtered results. Click the **'Choose'** button for the desired supplier to add them to the PR.

9. When all required fields are complete, the user can click the **'Add to cart'** button. If a field is incorrect or incomplete, it will be outlined in red and accompanied by an error message until it's corrected.

When all required fields have been correctly entered, click **'Add to cart'** to finalize the item.
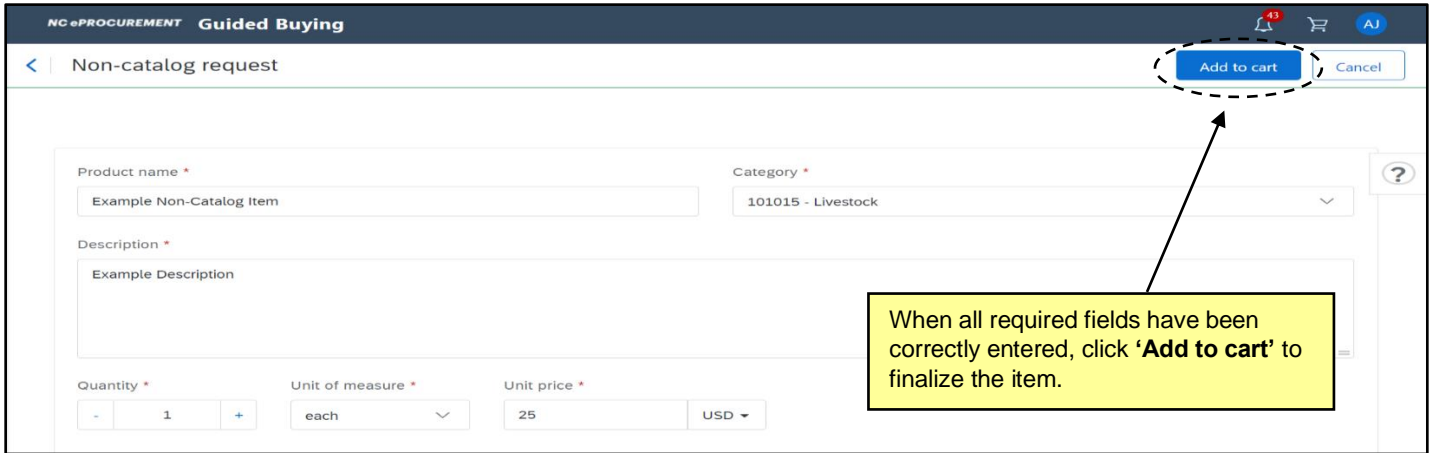
10. An item will appear in the shopping cart icon, and the drop-down will allow the user to click the **'X'** in order to continue shopping, click **'Delete'** to remove the item from the cart, or click **'Check out'** to go to the **'Checkout'** page for that item.

Users can click the **'X,'** the **'Delete'** link, or click **'Check out'** to proceed to the **'Checkout'** page.
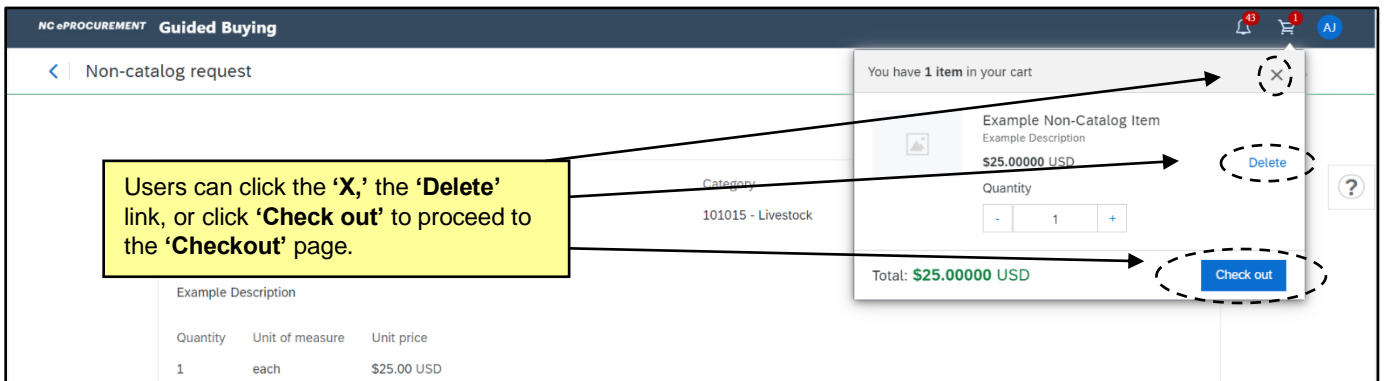
11. If the user clicks the **'X,'** it will reveal three options in the top right of the screen. Clicking **'Done'** will take the user back to the Guided Buying home page and the item will remain in the cart. Clicking **'Create new'** will allow the user to add an additional **'Non-catalog item'** to the cart, and clicking the three dots will display a drop-down option to **'Copy'** the line as an additional **'Non-catalog item.'**

Beneath the shopping cart drop-down, the user has the option to click **'Done,'** and the three dots, which will allow them to **'Create new,'** or **'Copy'** the non-catalog line item.
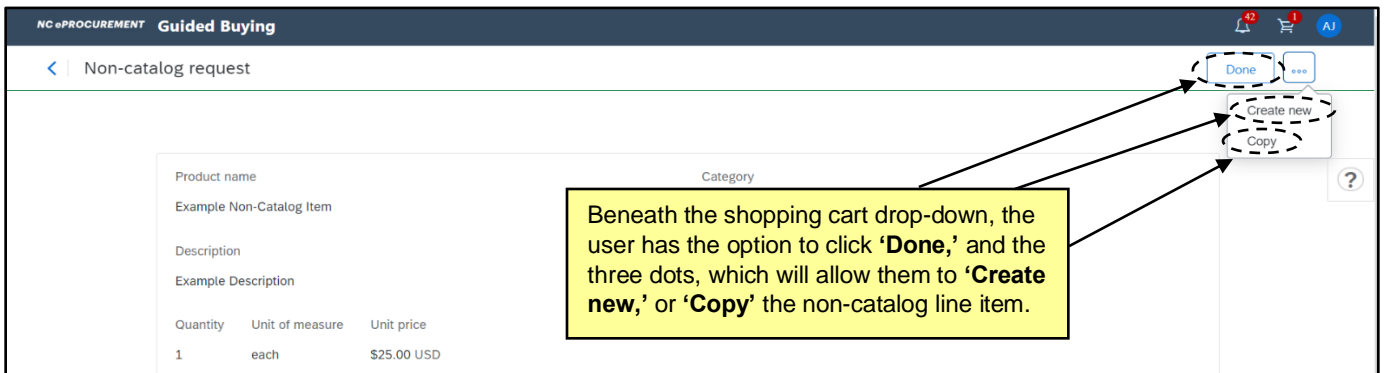
V. Selecting 'Unit of Measure' for Non-Catalog Items

NOTE: The guidelines in this section are NOT required for EPLite users like they are for State Agency users. However, some EPLite entities choose to follow these guidelines and this has been included for them. If an EPLite entity uses the **'Unit of Measure'** of **'Each'** for **'Blanket'** or **'Service'** line items, that is okay.

When entering a **'Non-catalog item,'** users **must** follow the below **'Unit of Measure'** guidelines that differ based on whether the item is a **'Blanket'** or a **'Non-Blanket'** item, and whether it is classified as a **'Good'** or a **'Service.'**

> Note: **'Good'** or **'Service'** will be determined by the **'Category'** (Commodity Code) selected, and the **'Blanket'** or **'Non-Blanket'** status can be indicated in the **'Others'** subsection of the **'Checkout'** page. **'Non-Blanket'** will be the default selection, but the user can switch the designation to **'Blanket'** on that page if necessary.

Line Item Classification	Unit of Measure		
	Dollar	**Hour**	**All Others**
Non-Blanket/Good	NO	NO	YES
Blanket/Good	YES	NO	NO
Non-Blanket/Service	YES	NO	NO
Blanket/Service	NO	YES	NO

Non-Blanket Good
- Set the **'Quantity'** to the total number of units to order.
- Set the **'Unit of Measure'** to anything **except** 'Dollar' or 'Hour' (example: 'Each').
- Set the **'Price'** to the price of the individual unit.

Blanket Good
- Set the **'Quantity'** to the total dollar amount of the order.
- Set the **'Unit of Measure'** to **'Dollar.'**
- Set the **'Price'** of the item to **'$1.00.'**
- Mark the blanket purchase indicator to **'Yes.'**

Non-Blanket Service
- Set the **'Quantity'** to the total dollar amount of the service.
- Set the **'Unit of Measure'** to **'Dollar.'**
- Set the **'Price'** of the item to **'$1.00.'**

Blanket Service
- Set the **'Quantity'** to the total number of hours to hire.
- Set the **'Unit of Measure'** to **'Hour.'**
- Set the **'Price'** to the price per hour.
- Mark the **'Blanket Purchase'** indicator to **'Yes.'**

VI. Checkout Page

The **'Checkout'** page allows the user to enter or update the details required to finalize the Purchase Requisition (PR) before it is sent for approval. It displays once the user has clicked the **'Check out'** button in the shopping cart dropdown. Some fields are required while others are optional. Required fields with missing or incorrect information will be highlighted by a red border and an error message.

1. The top of the **'Checkout'** page will display a **'Title'** that is defaulted to the first 25 characters in the description of the first line item on the PR (in the case below **'4" Patty Press waxed paper'**). This **'Title'** can be edited by moving the cursor to it and overwriting the default. It is highly encouraged to change this **'Title'** to something descriptive of the items being purchased to make the PR easily identifiable.

2. Below the **'Title'** the user will find the **'PR number,'** a unique identifier beginning with **'PR'** that is automatically generated by the system.

3. To the right of the screen, the **'Send request'** button (the button that passes the PR along for approval) will be grayed out and unable to be clicked until all required fields are completed in an adequate fashion.

4. **'Save and exit'** can be clicked if the user is not ready to click **'Send request'** but wants to keep the information they've already entered to complete later.
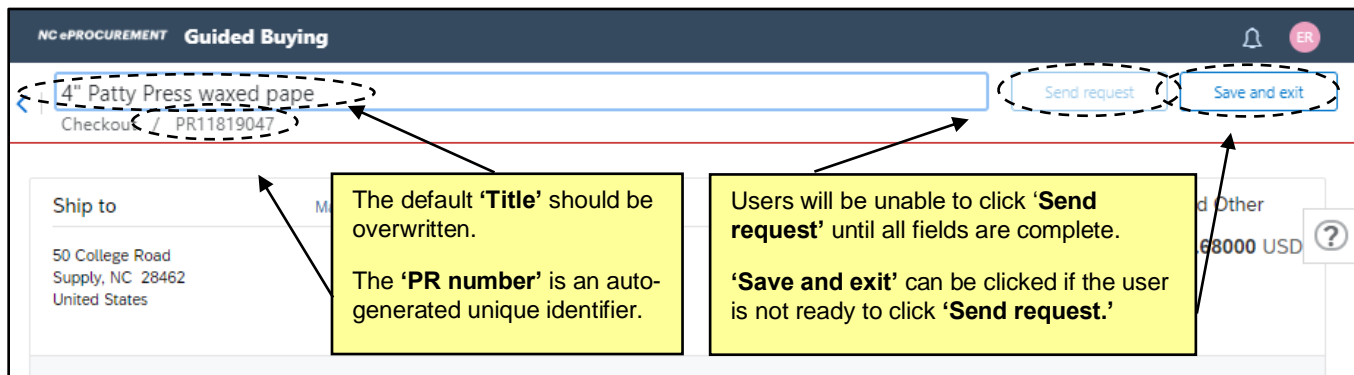
5. Below the top line are sections for **'Ship to,' 'Charge to,'** and **'Total Ordered Excluding Tax and Other Costs.'** Clicking on **'Manage locations'** will allow the user to **'Mass Edit'** shipping information if there are multiple line items on the PR, and clicking **'Manage details'** will allow for a **'Mass Edit'** of accounting information.
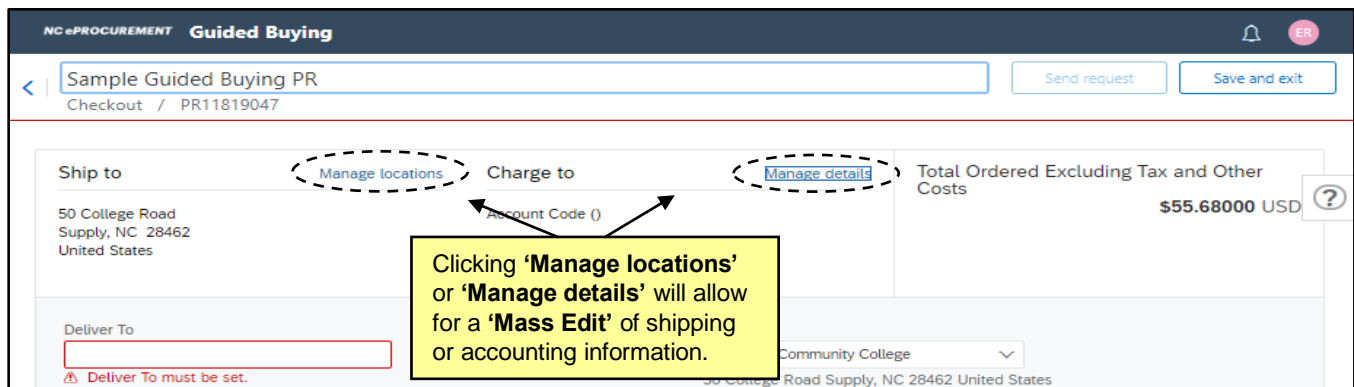
6. The Advanced options section below the area with **'Ship to'** and **'Charge to'** defaults to the expanded view, and a red border surrounds the **'Deliver To'** field directing the user to set a value. This free-text field indicates the recipient of the order and can be populated with any value, most commonly with the requester's name. This field can be defaulted in the user's profile so that it is automatically filled, in which case, the red border will not display.

7. The **'Ship To'** field automatically defaults to the ship to location set up in the user's profile. Users may choose a different option by selecting **'Browse all'** from the drop-down menu.

8. **'Entity'** defaults to the user's entity and can't be changed.

9. The **'On Behalf Of'** field will default to the requester's name, but the field can be edited by clicking the drop-down arrow and clicking **'Browse all'** to search for and select another user on whose behalf the PR will be created. Additionally, the requester could have selected the **'Request on behalf of'** button on the Guided Buying home page to initiate the PR on behalf of another user from the start.

10. The **'Suppress Order'** field defaults to **'No,'** meaning that the purchase order, when created, will NOT BE SUPPRESSED and **will be sent** to the supplier. If the selection is switched to **'Yes,'** the supplier will **not** receive a copy of the purchase order.

11. The **'FOB Code'** (Freight on Board) reflects how freight charges for the order are paid. This value defaults to **'(EPLite) Destination.'** Users may select a different option that better meets the agency purchasing policies by using the drop-down menu.

12. **GRAND TOTAL AMOUNT INCLUDING TAX AND OTHER COSTS:** This field will calculate automatically later in the process to be included on the Purchase Order. At this point in the process, it will display as **'Not specified.'**

13. In order to minimize the expanded view of the Advanced options section, click on the **'Hide advanced options'** text at the bottom of the section.
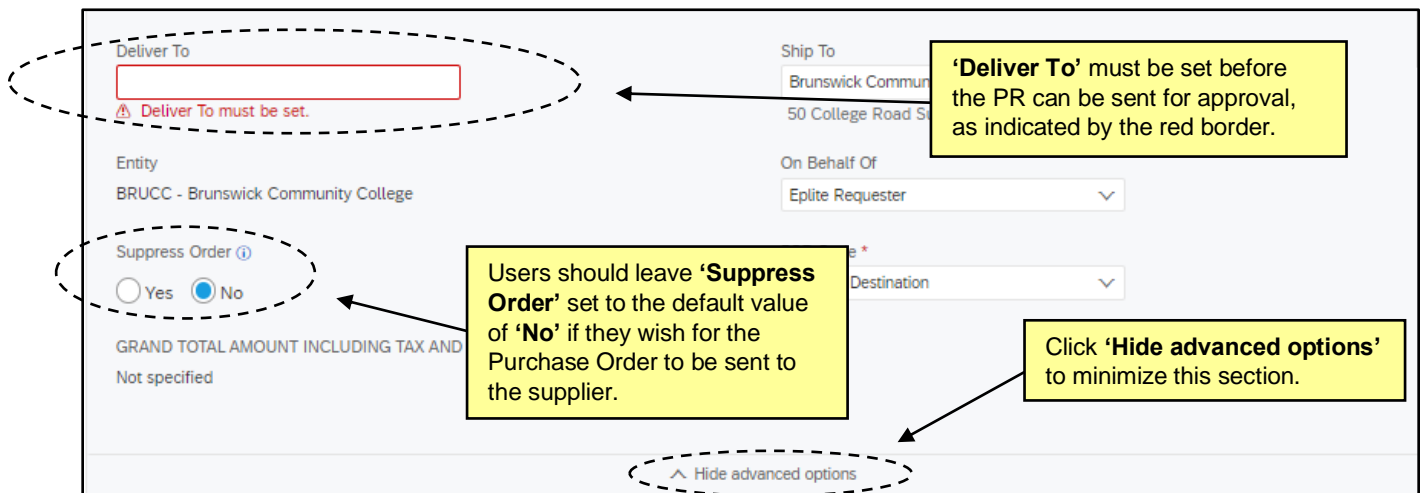
14. Below the Advanced options section, the line item(s) will display. If there are fields that need to be completed, a red notification will indicate at the top of each line item that there is missing or incorrect information. The user should click the arrow to the left of the item image to expand the line item details to review and update.

15. By clicking the three dots to the right of the line item, users will be presented with certain options depending on the type of line item. Standard catalog items will display **'Copy,' 'Delete,'** or **'Add to Favorites.'** Punchout catalog items will only have the option for **'Delete.'** Non-catalog items will display **'Copy'** and **'Delete.'**

16. When a line item is expanded to display the details view, the user will see five subsections below information about the supplier. **'Accounting,' 'Shipping,' 'Comments,' 'Attachments,'** and **'Others.'** Any of these subsections can be expanded by clicking the arrow to the left of each label.

17. If a subsection contains incomplete or incorrect information, it will open by default once the user clicks into the line item details. Typically, this will include the **'Accounting'** and **'Shipping'** subsections.

18. Within the '**Accounting**' subsection, the user will find the following fields:

19. **Bill To:** Defaults from the user's profile but can be modified using the drop-down menu. The **'Bill To'** Location code selected will determine the **'Bill To'** address that is printed on the line item. The invoice will be delivered to the specified address.

20. **Item Classification:** Set by the **'Category'** (commodity code) and cannot be changed. A 'good' commodity code will set the Item Classification to **'Good'** and a 'service' commodity code will set the Item Classification to **'Service.'**

21. **Account Code:** The appropriate Account Code should be entered in the free-text field.

    Note: NC eProcurement does not validate the account codes entered in the **'Account Code'** field or encumber the purchase amount from the designated account code. All financial functions are still completed in the entity's financial system.

22. **Tax Rate:** Defaults to the value set by the entity but can be changed using the dropdown menu.
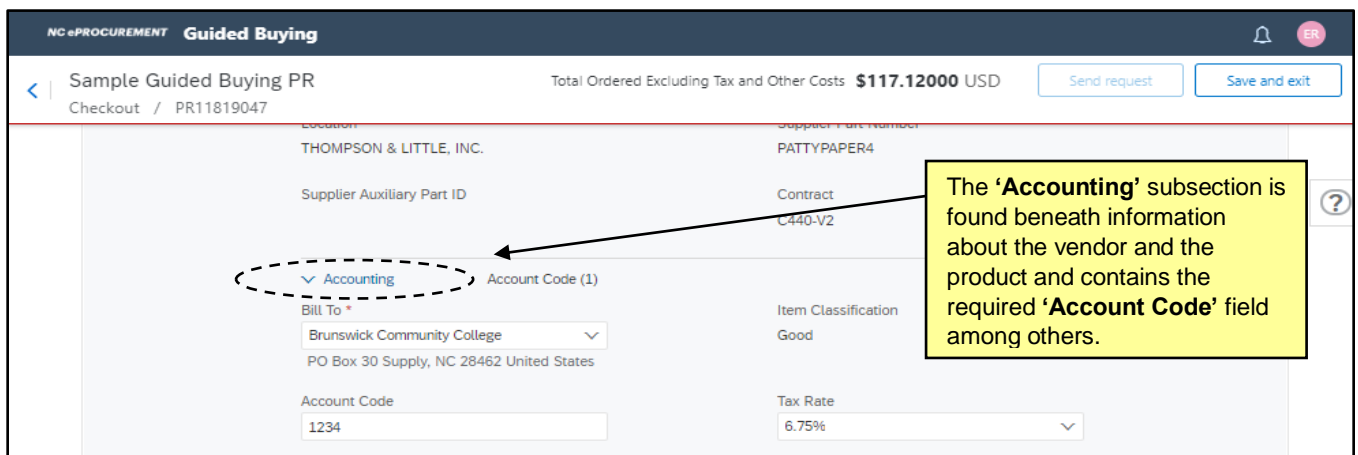
23. Within the '**Shipping**' subsection, the user will find the '**Ship To**' and '**Deliver To**' fields that they had the ability to previously fill out in the '**Advanced Options**' section at the top of the '**Checkout**' page. If the user needs to alter any of these on a per-line basis, they can do this here, but it is advised that these fields remain consistent across all line items.

The '**Shipping**' subsection is found beneath the '**Accounting**' subsection and contains two fields the user may have previously edited at the top of the '**Checkout**' page.
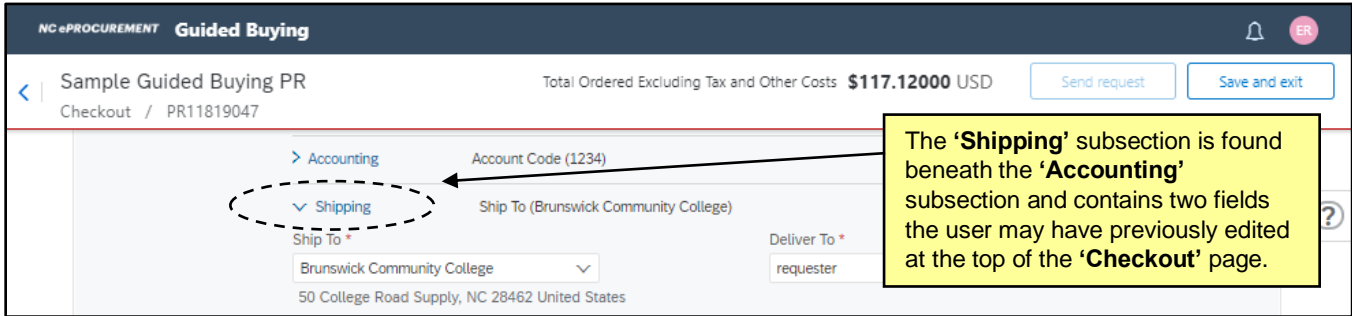
24. Although the system allows users to add '**Comments**' and '**Attachments**' at the line item level, they should avoid this and only add them at the header level on the '**Summary**' page. Attachments added on the line item level will not be sent to the supplier.

The '**Comments**' and '**Attachments**' subsections are found beneath the '**Shipping**' subsection, but it is advised that these be avoided on the line item level.

25. Within the '**Others**' subsection, the user will find the following fields.

    Note: For catalog items, most fields in this subsection are not editable, while a Non-catalog line item will have a few more, editable fields within '**Others.**'

26. **Commodity Code:** This field is not editable for catalog items, but on Non-catalog items, it is editable and will populate with the value selected in the '**Category**' field on the initial '**Non-catalog request**' page.

27. **Terms of Payment:** This field defaults to '**Net 30 Days**' and can only be edited by a user with the '**Purchasing Agent**' role.

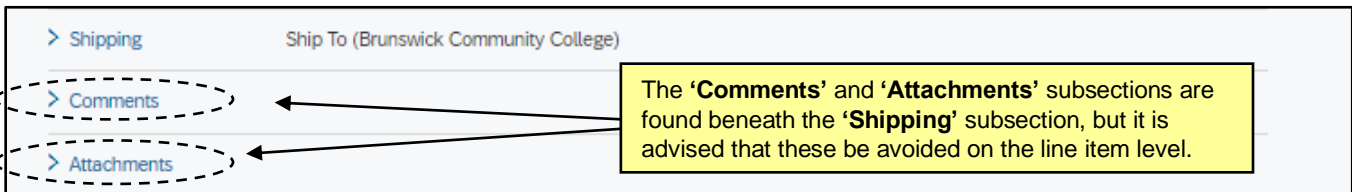28. **Contract:** This field will only display on Non-catalog items and it defaults to '**(no value).**' It cannot be edited.

    Contract Type: This field is not editable for catalog items, but on Non-catalog items the user can select the appropriate contract type if applicable. The field will default to '**No Choice,**' which is fine if the item is not already on a Statewide or Agency contract. This will likely be the case for most Non-catalog items, but there may be instances in which a user needs to enter a contract item that is not available via catalogs as an Non-catalog item, and selecting the correct '**Contract Type**' will be important. The options available in the drop-down menu are as follows:

    a. **Term Contract Statewide:** A contract for goods or services negotiated by P&C and available to all State purchasers. These items can often be found via the catalogs.

    b. **Term Contract Agency Specific:** A contract for goods or services negotiated by a specific Agency to cover a specific period of time. These items are not available via the catalogs.

c. **Term Contract IT Convenience:** A contract for goods or services negotiated by DIT and available to all State purchasers. These items can often be found via the catalogs.

d. **No Contract:** The item is not associated with any contract. This is the same as **'No Choice,'** so it is not necessary to select this if the user leaves **'No Choice'** as the default.

e. **Agency Contract:** A contract for goods or services negotiated by a specific Agency for a spot-buy (nonrecurring) purchase. These items are not available via the catalogs.

Note: Selecting **'Term Contract Statewide'** or **'Term Contract IT Convenience'** from the drop-down menu will add an additional **'Statewide Contract ID'** field to the page. Users may choose the drop-down menu in this new field and select **'Browse all'** to search for and select the Statewide Contract from which the item is being purchased. Selecting **'Term Contract Agency Specific'** or **'Agency Contract'** from the drop-down menu will also add an additional **'Agency Contract ID'** field to the page, but in this case, the field is a free text field where the user can key the appropriate information. Entering the correct contract information allows the State of North Carolina to accurately track and report against contract purchases.

If **a 'Contract Type'** of **'Term Contract Statewide'** or **'Term Contract IT Convenience'** is selected, an additional **'Statewide Contract ID'** field will display with a drop-down selector.

Contract Type
Term Contract Statewide

Statewide Contract ID
(no value)
⚠ This field is required when the Contract Type is St...

If **a 'Contract Type'** of **'Term Contract Agency Specific'** or **'Agency Contract'** is selected, an additional **'Agency Contract ID'** field will display with a free-text field.

Contract Type
Term Contract Agency Specific

Agency Contract ID
⚠ If Agency Contract ID is visible, it is required.

39. **Blanket Purchase Order?:** Choose whether the purchase is a Blanket order or a Non-Blanket order. This will default to **'No'** for Non-Blanket, but the selection can be switched to **'Yes'** if necessary.

40. **Tax Amount:** This field will calculate automatically later in the process based on the selected tax rate (within the **'Accounting'** subsection). At this point in the process, it will display as **'Not specified.'**

41. **Other Costs:** Users can enter in a dollar amount to be charged as **'Other Costs.'** It is advised that this field be used with caution, as use cases for this field are not common and tax is not applied on anything added here. This field should NOT be used for including tax or shipping charges from a vendor. Shipping charges on non-catalog items should continue to be added as an additional service line item.

42. **Line Total of Tax and Other Costs:** This field will calculate automatically later in the process. At this point in the process, it will display as **'Not specified.'**

43. **FOB Code:** This field defaults to **'(EPLITE) Destination'** for all orders.

44. **Recycled Content Indicator:** This field is only visible for Non-catalog orders and defaults to **'No.'** It can be adjusted to indicate that the item being purchased is recycled.

> Attachments

∨ Others

The **'Others'** subsection is found beneath the **'Attachments'** subsection, and the fields in it differ slightly depending on whether the item is from a catalog or is a non-catalog.

Commodity Code	Terms of Payment
481015 - Cooking and warming equipment	Net 30 Days
Contract Type	Statewide Contract ID
Term Contract Statewide	165A: Kitchen Equipment & Accessories
Tax Amount	Other Costs
Not specified	
Line Total of Tax and Other Costs	FOB Code *
Not specified	(EPLite) Destination

45. To add a comment at the requisition level, the user should type their note in the **'Write your comment…'** box in the **'Comments'** section below the line items. The **'Add'** button will become clickable, and the user should click in the **'Share with supplier'** box if they wish for the supplier to see the comment, otherwise it will only be visible internally. The user can add multiple comments to a single PR, and they will thread below with the most recent closest to the top. Comments can be deleted by the user by clicking **'Remove.'**

NC ePROCUREMENT **Guided Buying**

< Sample Guided Buying PR   Total Ordered Excluding Tax and Other Costs **$117.12000** USD   Send request   Save and exit
Checkout / PR11819047

Comments

Write your comment...   ☐ Share with supplier   Add

ER Eplite Requester
    6/19/20
    Sample Internal Comment
    Remove

ER Eplite Requester
    6/19/20   Shared with supplier
    Sample External Comment
    Remove

Enter comments in the **'Write your comment…'** box and click **'Add'** when complete.

Delete a comment by clicking **'Remove.'** Comments that will be visible to the supplier will be indicated by **'Shared with supplier'** tag.

46. Attachments may be added to the entire PR in the **'Attachments'** section below the **'Comments'** section. Users can either **'Drag and drop'** a file to upload it, or they can click **'browse'** to search for files within their computer. Once a file has been selected, the **'Add'** button will become clickable, and the user should click in the **'Share with supplier'** box if the wish for the supplier to see the attachment, otherwise it will only be visible internally. The user can add multiple attachments to a single PR. Attachments can be deleted by the user by clicking the **'X'** in the top right of the attachment icon.
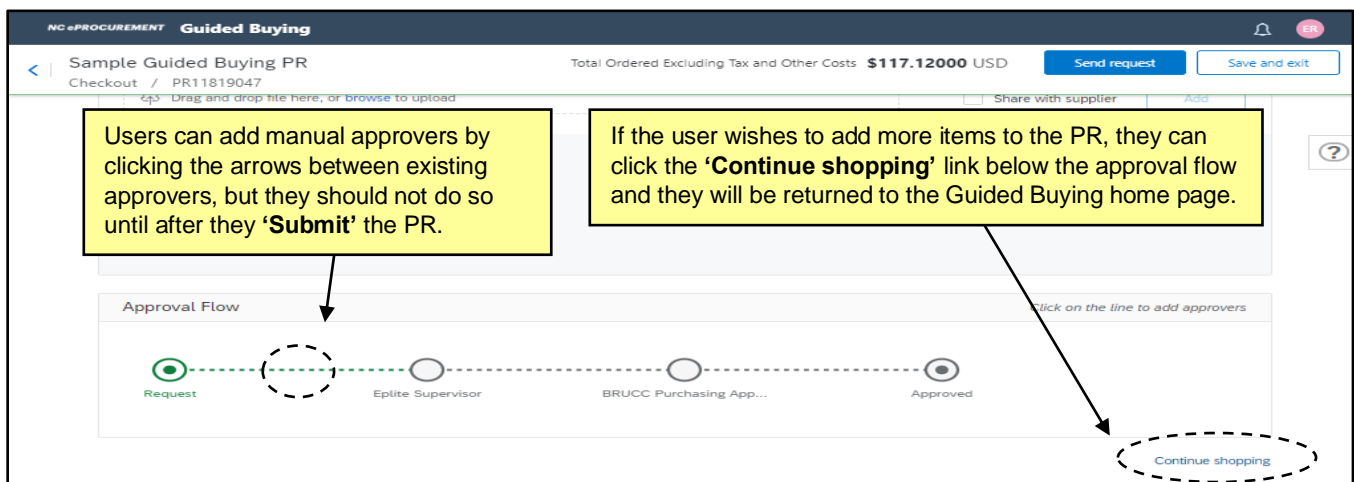
Notes:
- The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .dotx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xml, and .zip

- The maximum combined file size limit for attachments is 10MB.

Users can **'Drag and drop'** a file into the box or click **'browse'** to select one from their computer, then click the **'Add'** button to put it on the PR. Attachments can be deleted by clicking the **'X'** in the top right of the attachment icon.
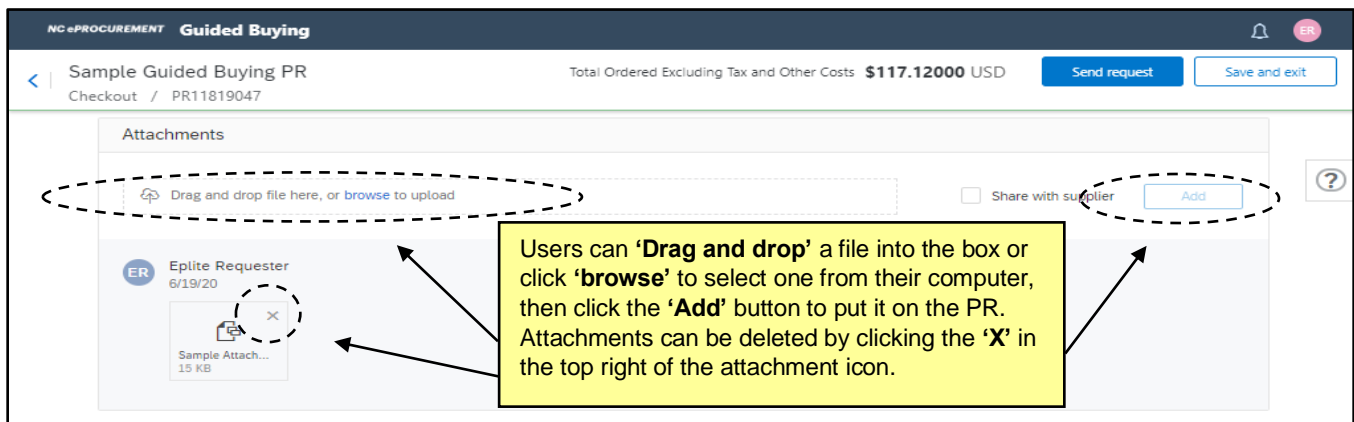
47. The system generated approval flow will be visible in the **'Approval Flow'** section below the **'Attachments'** section. If the user needs to add additional items to this PR, they can click the **'Continue shopping'** link at the bottom of the PR and be directed back to the catalog where they can add additional items.

Note: Users will have the ability to manually add additional approvers at this point, but it is very important that they **'Submit'** the order first and then go back and add any approvers. If an approver is added at this point before the user clicks **'Submit,'** that approver will have to approve the Purchase Order again once it returns to NC eProcurement after being approved in the entity's financial system.

Users can add manual approvers by clicking the arrows between existing approvers, but they should not do so until after they **'Submit'** the PR.

If the user wishes to add more items to the PR, they can click the **'Continue shopping'** link below the approval flow and they will be returned to the Guided Buying home page.

48. When all required information is correctly added, the red borders and notifications will disappear from the **'Checkout'** page, and the **'Send request'** button with appear in blue in the upper-right and become clickable. Click this button to send the PR to be reviewed and approved by the approval flow.
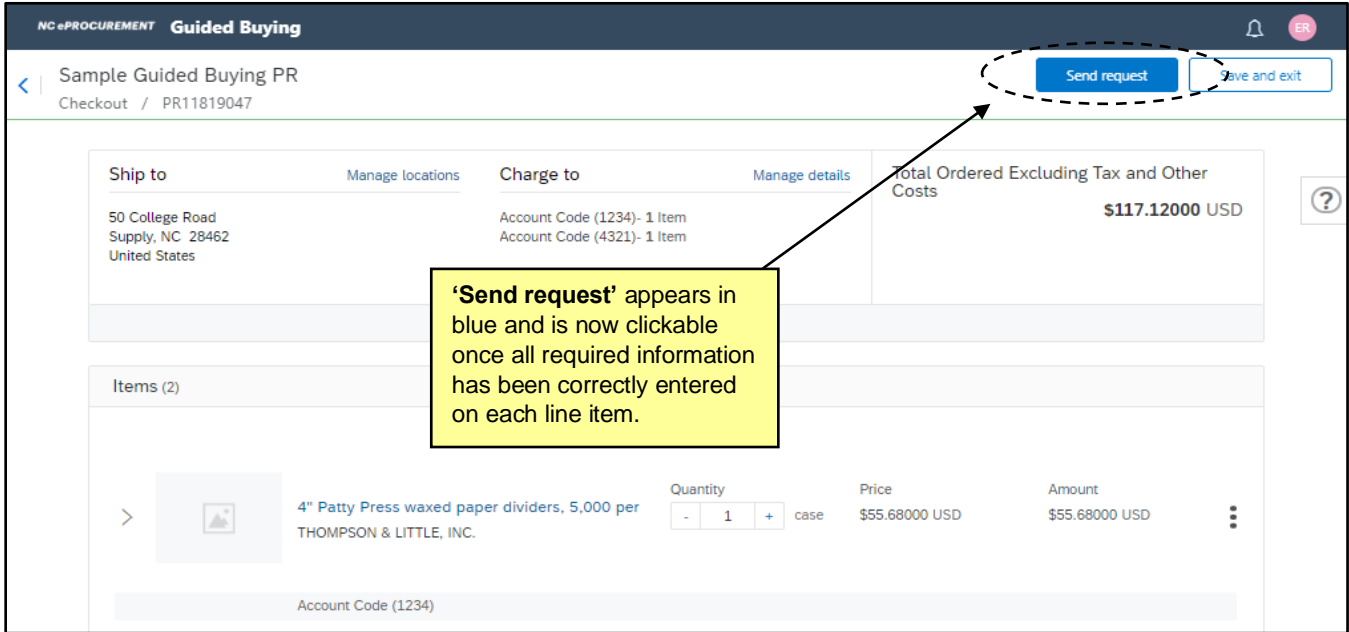
49. A **'Success'** notification will display, and the PR status will be updated to **'Submitted.'** Click **'Done'** to return to the Guided Buying home page, or **'View requisition'** to revisit the details of the PR.