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.

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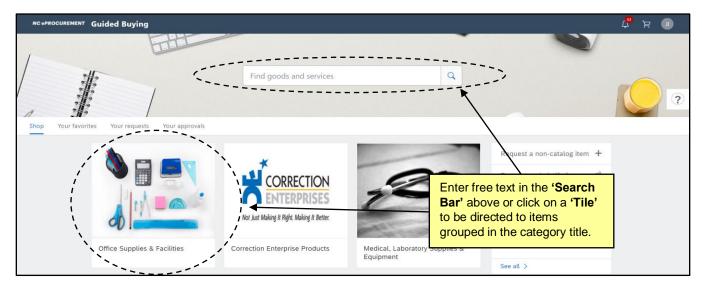
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I. Adding Catalog Items

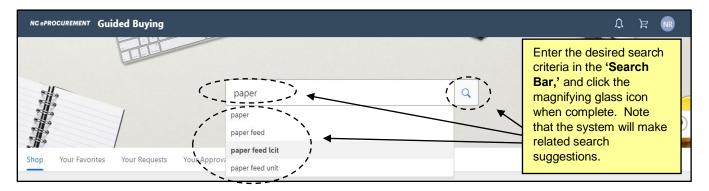
If an item appears in the NC eProcurement catalogs, it is on a Statewide Term Contract (STC) negotiated on behalf of the State of North Carolina's buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their PR by utilizing the catalog search functionality.

 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.'

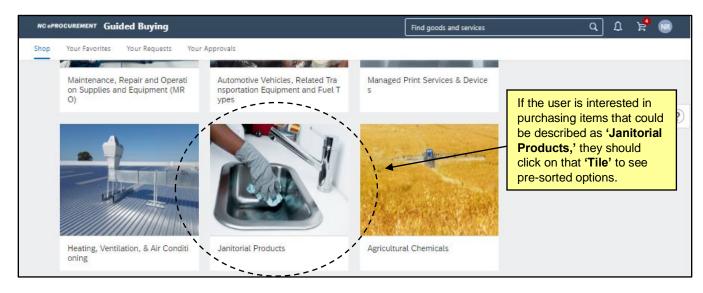


2. If using the 'Search Bar,' enter the desired search criteria (i.e., 'Keyword,' 'Supplier Part #,' 'Manufacturer,' 'Statewide Contract ID,' or 'Category') and click the magnifying glass or press 'Enter.'

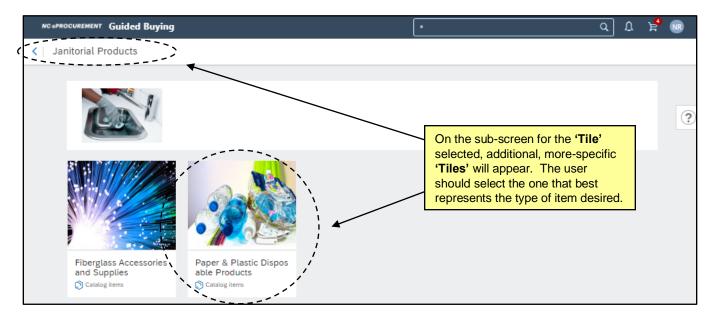
Note: The '**Search Bar'** will suggest results based on what's been entered before the search is complete and has a "fuzzy" nature to it, meaning that the system will attempt to return results that sound like the entered search criteria, not just match the results to the exact text of the search.



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



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.



- 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.

NC OPROCUREMENT Guided E	Buying	P	aper	्र भू वि
< Search Results				
Refine results Supplier BRAME SPECIALTY COMPANY, INC. 1 DANA SAFETY SUPPLY 2	Comparing 8 Showing 8 Click th	pletely reset the search rocurement' in the top earrow next to 'Search e back to the previous the dropdown next to 'Se the order in which the ed.	left, or click Results' to search input. ort by' to	Sort by: Relevance V
GAUMARD SCIENTIFIC COMPANY 23 KYOCERA Document Solutions 16 MERCO Biomedical 5 See more	4" Patty Press, taxed paper dividers, 5,500 per THOMPSON & LITTLE, IXC. \$55.68000 USD / case	Checking the box ne	500 Sheet Paper Drawer, Multi Purpose Paper At to one of the efine Results' panel	Accessory, Purchase, 550- sheet Paper Tray, SYSTEL BUSINESS EQUIPME \$221.60000 USD / each
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clarity diagnostics llc 1 dynarex 5 See more	Accessory, Purchase, 550 sheet Paper Tray and SYSTEL BUSINESS EQUIPME \$451.60000 USD / eac	3x550 sheet Paper Tray and	Recording Paper for F6/F9 Fetal Monitor 152MM POCKET NURSE ENTERPRIS \$10.10000 USD / box	ECG Thermal Paper Rolls for ELI 230 POCKET NURSE ENTERPRIS \$93.47000 USD / case
Category Institutional Food Services Equipment 16			More	
Miscellaneous Printer and Photocopier and				

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.

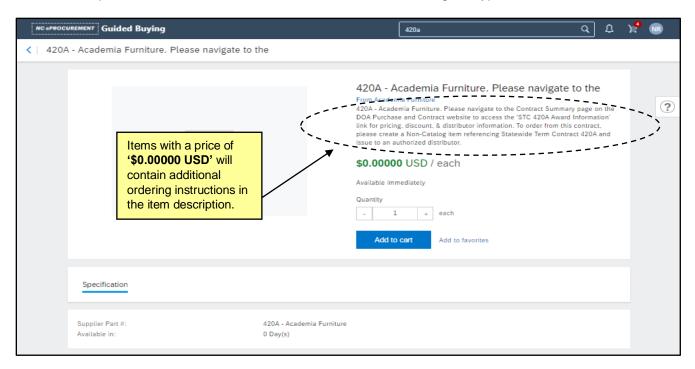
11. If the user hovers their cursor over a catalog item, it will be surrounded by an expanded blue rectangle with an option to select the quantity desired and click the 'Add to cart' button.

NC OPROCUREMENT Guided	Buying	paper		र प्र	NR
Search Results					
Refine results	Company catalog				
Supplier	Showing 8 of 301 results			Sort by: Relevance V	?
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Manufacturer amd-medicom, inc. 2 apothecary products llc. 1	Quantity - 1 + case Add to cart				

12. For more information about the item, click on it to display a detailed view.

The detailed view shows the same inform from the results page, including the ability a quantity and 'Add to cart,' but it also dis more detailed information in the 'Specific section, such as 'Supplier Part #,' lead the weblinks for the supplier and manufacture 'Statewide Term Contract ID,' and the 'E Number' among others.	to select Available immediately splays ation' me, r, the each
Manufacturer: MACH Manufacturer Part #: G01 Si Available in: 0 Day(Bid Number: 20160 Contract Type: T Statewide Contract ID: 430A Information from Supplier: http://withoutage	

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.



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.

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Search Results Items with '(DIST)' in f description will be disp multiple times. The on difference in the produ the 'Supplier.' Users choose any of the sim this instance, as they y the same, they'll just b from different locations	played ly est ts may villar items in will all be e shipped	besides th 'Supplier	ical items ne different .'	Sort by: Relevance ✓	?
john deere 1 machine & welding/andy oxy 54	430AM - 1200A Bunker and Field Rake DEERE & COMPANY \$11,817.24000 USD / each	(DIST) ARGON- 98%/0XYGEN-2% MIX GAS, COMMERCIAL GRADE WITH NECESSARY VALVES, SIZE <u>ANOY 0XY COMPANY, INC.</u> \$8.88000 USD / each	(DIST) ARGON- 98%/OXYGEN-2% MIX GAS, COMMERCIAL GRADE WITH NECESSARY VALVES, SIZE Arc3 Gases \$8.88000 USD / each	(DIST) ARGON- 95%/OXYGEN-5% MIX GAS COMMERCIAL GRADE WITH NECESSARY VALVES, SIZE ANDY OXY COMPANY, INC. \$8.88000 USD / each	
mix 18 oxygen 12					

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.'

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Refine results	Company catalog							
Type Name	Showing 8 of 1110 results			Sort by: Relevance V				?
Color 550 Color and General Size 545 Supplier Arrow Safety Device Company 222	(DIST) Throat Protector	(DIST) Threat Prefetor	Catalog Enumeration display a ' Select ' butt button to see the deta select the preferred of	ton. Click that iled view and				
CAROLINA UNIFORMS & EQUIPMENT 222	Tactical Carrier With Performanch IIIA Ballistics (One	Tactical Carrier With Performance6 IIIA Ballistic (One	Tactical Carrier With Performance6 IIIA Ballistics (One	Tactical Carrier With Performance6 IIIA Ballistics (One				
DANA SAFETY SUPPLY 222	Arrow Safety Device Company \$12.88000 USD / each	SAROLINA UNIFORMS & EQ S12.88000 USD / each	Safety & Security International \$12.88000 USD / each	DANA SAFETY SUPPLY \$12.88000 USD / each				
Harrison's Workwear 222 Safety & Security International 222	Select							

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.

NC OPROCUREMENT Guided Buying	680c Q	Û	ਬ	NR
< (DIST) Throat Protector Tactical Carrier With Performance6 I	IIA Ballistics (One			
A blue box will surround the selected preferred option, and the 'Add to cart' button will be clickable.	(DIST) Throat Protector Tactical Carrier With Performance6 IIIA Ballistics (One From Arrow Safety Device Company Throat Protector Tactical Carrier With Performance6 IIIA Ballistics (One Size based on Tactical Vest) St2.88000 USD / each Available in 60 days Quantity 1 + each Color * Black Brown Coyote MultiCam Navy Olive Drab Ranger Green Add to cart Addito favorites			?

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.

NC & PROCUREMENT Guided Buying	paper QL 😤 🕷
4" Patty Press waxed paper dividers, 5,000 per	You have 1 item in your cart
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.	4" Patty Press waxed paper divid 4" Patty Press waxed paper dividers, 5,000 555.68000 USD Quantity Quantity - 1 + Check out Quantity - 1 + case Add to cart Add to favorites

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.

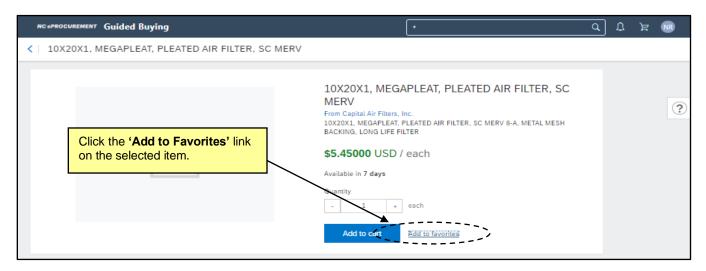
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NC OPROCUREMENT Guide	ed Buying		paper	۹] 🏾 🖌	NR ;
< Search Results		(You have 2 item	is in your cart	×	
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COMPANY, INC. 1 DANA SAFETY SUPPLY 2	as to how many items ar			5" Patty Press waxed paper divid 5" Patty Press waxed paper dividers, 5,000		
GAUMARD SCIENTIFIC COMPANY 23				\$61.44000 USD Quantity	Delete	
KYOCERA Document Solutions 16	4" Patty Press waxed paper dividers, 5,000 per	5" Patty Press waxed paper dividers, 5,000		- 1 +		
MERCO Biomedical 5	THOMPSON & LITTLE, INC.	THOMPSON & LITTLE, I				
See more	\$55.68000 USD / case	\$61.44000 USD / o	Total: \$117.1	2000 USD	Check out	2

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.



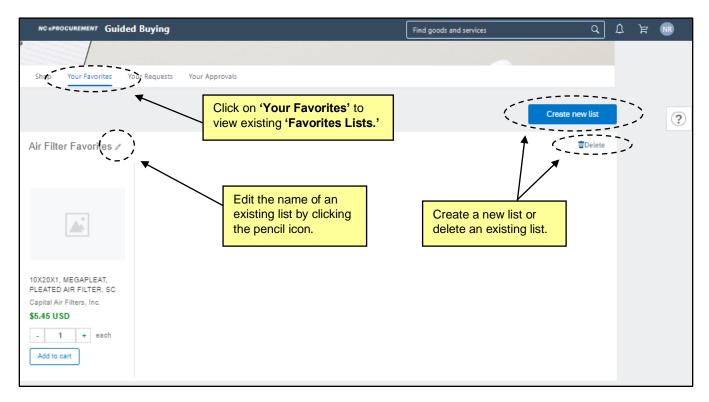
3. The **'Favorites'** popup will display. Click **'Create new list,'** type the name of the list, and click **'Done.'** The item will be added to that list.

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	10X20X1, MEGAPLEAT, PLEATED AIR FILTER, SC			
Favorites	× V 8-A, METAL MESH			?
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Click 'Create new list,' enter a name, and click 'Done.'				
Specification	Done			

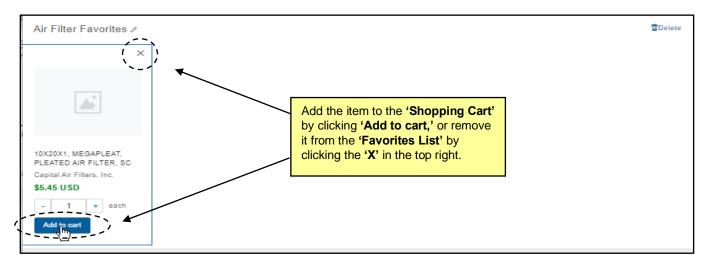
4. The same item may be added to multiple lists by checking the box next to each list and clicking the 'Done' button. If the item already exists in a list, the user will receive a notification that the 'Item is already in List' and that list will be unable to select.



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.



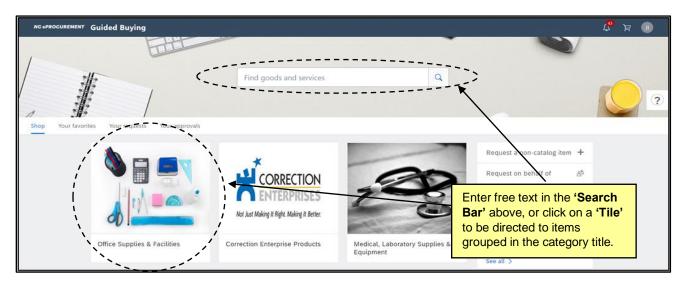
6. Add an item from a **'Favorites List**' to the cart by clicking **'Add to cart**,' or delete the item from the list by clicking the **'X'** in the top right corner of the item. A confirmation screen will appear asking the user if they are sure they wish to remove the item from the list, to which they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



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.

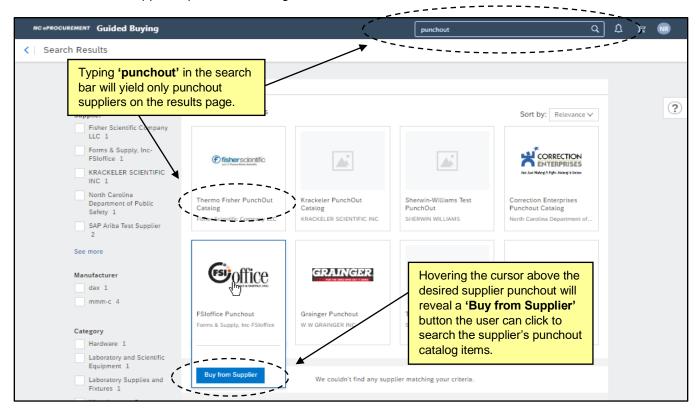
1. There is no need to initiate a punchout catalog purchase in Guided Buying; users just need to search for the item(s) they would like to buy and add them to their shopping cart. Catalog items can be searched for by using the 'Search Bar' or 'Tiles.'



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.

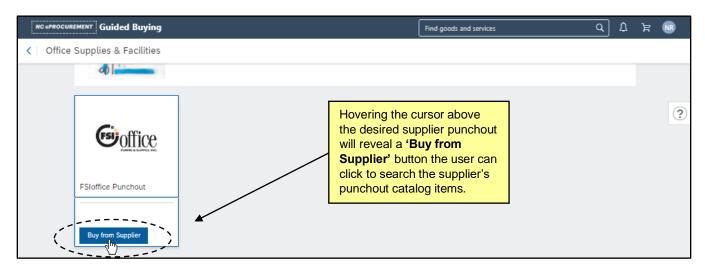
- 3. Punchout catalog results will not show individual items with prices like standard catalog items. A tile with the supplier's name followed by '**PunchOut Catalog**' will display for every available punchout catalog.
- 4. If the user hovers their cursor over the punchout catalog tile they wish to 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.'**.

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			Ţ	Close Session
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	What can we help you find	today? Keyword or item #	Q € 2 iter	ms : \$28.89
Acct: STATEOFNC-ST Office Supplies	When the user is done searching supplier's punchout site, click 'S the items back to the PR. If the user did not add any items 'Close Session' to return to 'NC	ubmit Cart' to send	Welcome back, ncas n	equester 001
Search These Re	Sults: Go Add to: Select Cart Favorite Compare	Items per page 10 🗸	м ч н	5)
Keyword: post it SEARCH BY CATE(Adhesive Note Pic	GORY Square - 90 She - Paper - Self-ac	Sticky Pop-up Notes - 1080 - 3" x 3" - eets per Pad - Unruled - Canary Yellow dhesive, Repositionable - 12 / Pack notes for easy use	(Pack 8330125SC	

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.

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<	FSIoffice Punchout Checkout / PR11818633	Total Cost \$28.89000 USD	Send request	Save and exit	***
	Items (2)		Click the item 'Des to the punchout cat items to the PR if n	alog to edit or add	
	Post-itreg; Super Sticky Pop-up Notes - 1080 Forms & Supply, Inc:PBIoffice	3 pack	Price \$8.31000 USD	Net Amount \$24.93000 USD Gross Amount (i) \$24.93000 USD	:

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.



- 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 dropdown 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.

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Non-catalog request	Add to cart Cancel	
Choose a category Search Search Search Search Image: Search </th <th>Search for the appropriate 'Category' via UNSPSC, either by code or keyword. To view the commodity code drop-down menu by header, click the arrow next to the category. The drop-down menu will expand to show the list of choices under the main header. Users must select a six-digit category.</th> <th>(?)</th>	Search for the appropriate 'Category' via UNSPSC, either by code or keyword. To view the commodity code drop-down menu by header, click the arrow next to the category. The drop-down menu will expand to show the list of choices under the main header. Users must select a six-digit category.	(?)
✓ 1010 - Live animals - 1010	Choose	
> 101015 - Livestock - 101015	Choose	
> 101016 - Birds and fowl - 101016	Choose	

- 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.
- 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.
- 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.

NC OPROCUREMENT Guided Buying	L = A
Non-catalog request	Add to cart Cancel
Product name *	Category *
Example Non-Catalog Item	101015 - Livestock
Description *	
Example Description Quantity * Unit of measure * Unit price *	When all required fields have been correctly entered, click ' Add to cart ' to finalize the item.
- 1 + each ~ 25	USD -

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.

NC OPROCUREMENT Guided Buying			L ⁴ 🚽 🔊
Non-catalog request		You have 1 item in your cart	★ (×)
Users can click the 'X,' the 'Delete' link, or click 'Check out' to proceed to the 'Checkout' page.	Category 101015 - Livestock	Example Non-Catalog Item Example Description s25.00000 USD Quantity - 1 +	(Delete)
Example Description		Total: \$25.00000 USD	Check out
Quantity Unit of measure Unit price			
1 each \$25.00 USD			

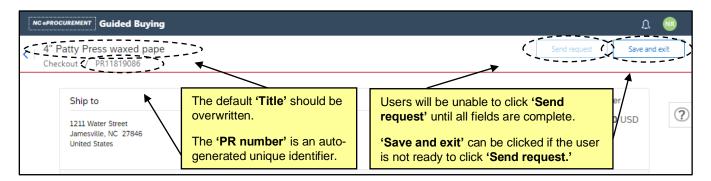
11. If the user clicks the 'X,' it will reveal two options in the top right of the screen. Clicking 'Done' will take the user back to the Guided Buying home page and the item will remain in the cart. Clicking the three dots will display a drop-down option to 'Create new,' allowing the user to add an additional 'Non-catalog item' to the cart, or 'Copy' the line as an additional 'Non-catalog item.'

NC oPROCUREMENT	Guided Buying			4 ⁴² 😫 젱
< Non-cata	log request			Done
	Product name Example Non-Catalog Item Description Example Description Quantity Unit of measure 1 each	Unit price \$25.00 USD	Category 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.	Create new Copy

V. 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.

- 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.



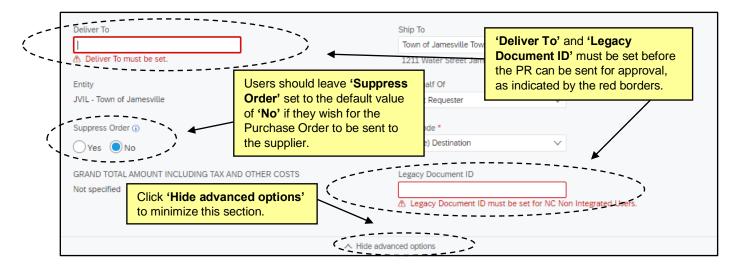
5. Below the top line are sections for 'Ship to,' 'Charge to,' and 'Total Ordered Excluding Tax and Other Costs.' Clicking on 'Manage locations' will allow the user to 'Mass Edit' shipping information if there are multiple line items on the PR, and clicking 'Manage details' will allow for a 'Mass Edit' of accounting information.

4" Patty Press waxed pape Send request Save and exit Checkout / PR11819086 Send request Save and exit Ship to Manage locations Charge to Manage details 1211 Water Street Item Classification (Good) Total Ordered Excluding Tax and Other Jamesville, NC 27846 Item Classification (Good) S55.68000 USD Clicking 'Manage locations' Clicking 'Manage locations'	NC & PROCUREMENT GL	uided Buying			Δ 💿
1211 Water Street Item Slassification (Good) Jamesville, NC 27846				Send request	Save and exit
or 'Manage details' will allow	1211 Water Jamesville, I	Street NC 27846	Costs Clicking 'Manage locations'	0	0
Deliver To for a 'Mass Edit' of shipping or accounting information. ▲ Deliver To must be set. 1211 Water Street Jamesville, NC 27846 United States			for a ' Mass Edit ' of shipping or 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 not calculate and will display as 'Not specified.'

Note: The 'Total' reflected here, as well as in the 'Amount' field for each line item, does not reflect the inclusion of the 'Tax Amount' or 'Other Costs.'

- 13. Legacy Document ID: The identification number that the user will need to enter for the particular order. The number will be associated with the order throughout its existence. This field is required as indicated by the red border surrounding it until it is populated with a unique value.
- 14. 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.



- 15. 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.
- 16. 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.'

NC & PROCUREMENT Guided Buying				۵
Sample Guided Buying PR Checkout / PR11819047 Items (2)	Two line items are displayed below the Advanced options section in this example.	r in	The three dots to the three dots to the three dots to the term will provide the options such as 'Co	user with other
⚠ This item contains missing or incorrect	information. Expand to review the fields high	lighted in red.		
THOMPSON & L	waxed paper dividers, 5,000 per ITTLE, INC. tification indicates the item nissing or incorrect mation. Click the arrow to	antity 1 + case	Price \$55.68000 USD	Amount \$5 Copy Delete Add to Favorites
	eft of the item image to nd the line item details.	lighted in red.		
5" Patty Press THOMPSON & L	waxed paper dividers, 5,000 per	antity 1 + case	Price \$61.44000 USD	Amount \$61.44000 USD

17. 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.

~	4" Patty Press waxed paper dividers, 5,000 per THOMPSON & LITTLE, INC.	Quantity - 1	+ case	Price \$55.68000 USD	Amount \$55.68000 USD	:
	Location THOMPSON & LITTLE, INC. Supplier Auxiliary Part ID		Supplier Part PATTYPAPEF Contract C440-V2 Below i		e	
	Accounting Item Classification (Good) Shipping Ship To (Town of Jamesville To Comments Attachments Others	wn Hall)	contain can be the arro	r, each line item s five subsections th expanded by clickin ows next to each lab and edit that section	ng on Del to	

18. 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 **'Shipping'** subsection.

NC & PROCUREMENT Guided Buying			Δ 🚥	
Sample Guided Buying PR	Total Ordered Excli	uding Tax and Other Costs \$117.12000 USD	Send request Save and exit]
Checkout / PR11819086	ccounting The ' Shipping ' so default to open if To' field has not b	the 'Deliver		
Ship Tov 12:	Shipping Ship To (Town of Jamesville Town p To * wn of Jamesville Town Hall v 11 Water Street Jamesville, NC 27846 United ates	n Hall) Deliver To *		?)

- 21. Within the 'Accounting' subsection, the user will find the following fields:
- 22. **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.
- 23. **Item Classification:** Set by the '**Category**' (commodity code) and cannot be changed. A "goods" commodity code will set the Item Classification to '**Good**' and a "service" commodity code will set the Item Classification to '**Service**.'
- 24. Tax Rate: Defaults to the value set by the entity but can be changed using the dropdown menu.

NC & PROCUREMENT Guided Buying				۵	NR
<pre>Sample Guided Buying PR Checkout / PR11819086</pre>	Total Ordered Exc	cluding Tax and Other Costs \$117.1	2000 USD	Send request Save and	exit
Location		Supplier Part Number			
THOMPSON & LITTLE, INC.		PATTYPAPER4		counting' subsection is	
Supplier Auxiliary Part ID		Contract		eneath information	?
+		C440-V2	about th three fie	e vendor and contains lds.	
✓ Accounting Item	Classification (Good)				
Bill To *		Item Classification			
Town of Jamesville	\sim	Good			
PO Box 215 Jamesville, NC 2784	46 United States				
Tax Rate					
6.75%	\sim				

25. 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.

NC & PROCUREMENT Guided Buying			D (NR
Sample Guided Buying PR Checkout / PR11819086	Total Ordered Excluding	g Tax and Other Costs \$	117.12000 USD Send request Save and ex	dt
> Accounting	Item Classification (Good)		The ' Shipping' subsection is found beneath the ' Accounting '	
✓ Shipping	Ship To (Town of Jamesville Town Hall	l)	subsection and contains two fields	?
Ship To * Town of Jamesville T	īown Hall →	Deliver To * requester	the user may have previously edited	
1211 Water Street Ja States	amesville, NC 27846 United		at the top of the 'Checkout' page.	

26. 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.

> Shipping Ship To (Town of	Jamesville Town Hall)
> Comments	The ' Comments' and ' Attachments' subsections are found beneath the ' Shipping ' subsection, but it is
> Attachments	advised that these be avoided on the line item level.

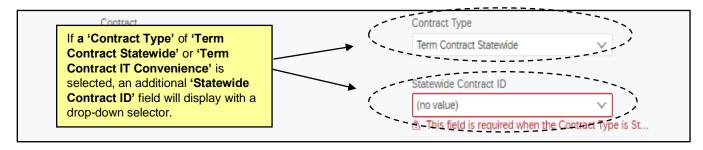
27. Within the 'Others' subsection, the user will find the following fields.

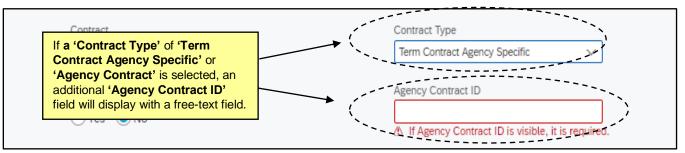
Note: For catalog items, most fields in this subsection are not editable, while a Non-catalog line item will have a few more editable fields within '**Others**.'

- 28. **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.
- 29. Terms of Payment: This field defaults to 'Net 30 Days' and can only be edited by a user with the 'Purchasing Agent' role.
- 30. Contract: This field will only display on Non-catalog items and it defaults to '(no value).' It cannot be edited.
- 31. **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 a Non-catalog item, and selecting the correct '**Contract Type**' will be important. The options available in the drop-down menu are as follows:
 - a. <u>Term Contract Statewide</u>: 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.** <u>Term Contract Agency Specific</u>: 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.** <u>Term Contract IT Convenience</u>: 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 spotbuy (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.





- 32. 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.
- 33. **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**.'
- 34. **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.
- 35. Line Total of Tax and Other Costs: This field will not calculate and will display as 'Not specified.'
- 36. FOB Code: This field defaults to '(EPLITE) Destination' for all orders.
- 37. 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 Commodity Code	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 item.
481015 - Cooking and warming equipmen	t Net 30 Days
Contract Type Term Contract Statewide	Statewide Contract ID 165A: Kitchen Equipment & Accessories
Tax Amount Not specified	Other Costs
Line Total of Tax and Other Costs Not specified	FOB Code * (EPLite) Destination

38. 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.'

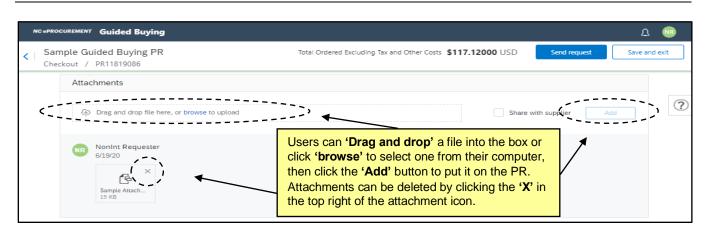
N				<u>۵</u>
<	Sample Guided Buying PR Checkout / PR11819086	Total Ordered Excluding Tax and Other Costs \$1	17.12000 USD Send request Save	and exit
	Comments Write your comment Write your comment Nr NonInt Requester 6/19/20 Sample Internal Comment Remove NonInt Requester 6/19/20 Shared with supplier Sample External Comment Remove	Delete a comment by clicking 'Remove.' Comments that will be visible to the supplier will be indicated by 'Shared with supplier' tag.	Enter comments in the 'Write your comment' box and click 'Add' when complete.	

39. 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.

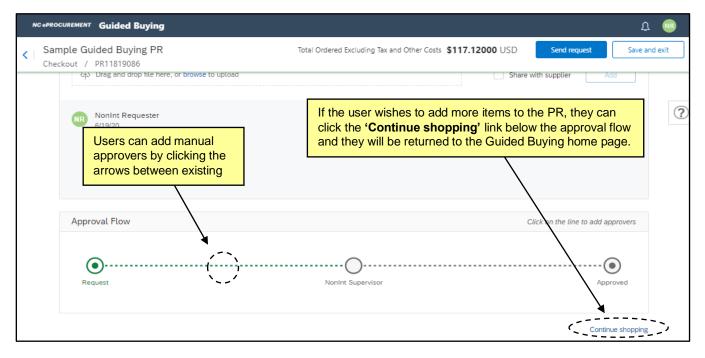
Notes:

- 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.

NORTH CAROLINA ePROCUREMENT



40. 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.



41. 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.

NC eProc	urement			
Creating	Purchase	Requisitions:	Guided	Buying

< San	CUREMENT Guided Buyin nple Guided Buying P ckout / PR11819086	-			(X	Send request	۲ Save ar	
	Ship to 1211 Water Street Jamesville, NC 27846 United States	blu	Charge to Item Classification (Good) end request' appo le and is now click	kable	is lotal Ordered Costs	I Excluding Tax and Othe \$117.12000		?
	Items (2)	ha			Price \$55.68000 USD	Amount \$55.68000 USD		

42. 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.

NC & PROCUREMENT Guided Buying			A 🦻 📧
Sample Guided Buying PR Request details / PR11819086	The PR will display in 'Submitted ' status, and can return to the Guided home page by clicking ' within the 'Success' no	d the user d Buying 'Done'	Withdraw Edit ••• > Help Center Search
Request	Success Your requisition has been sent for approval.	×	 Setting up guided buying Getting started with your help community
Comments			
Write your comment		New requisition Share with supplier Add	
NonInt Requester 6/19/20 Sample Internal Comment			