NC eProcurement

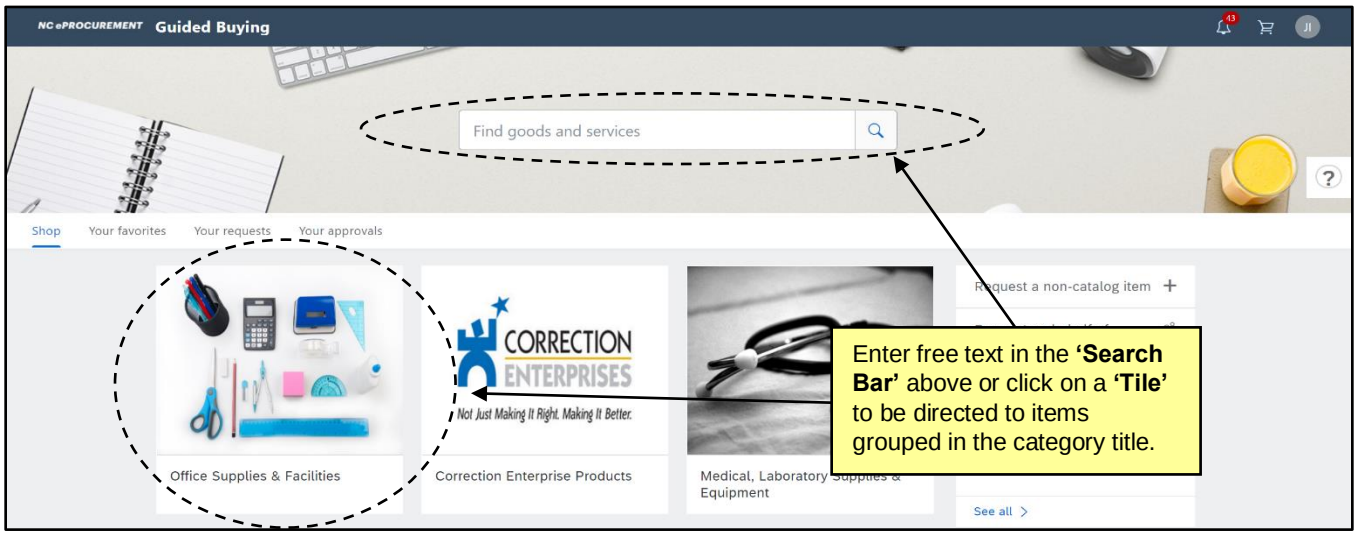
Creating Purchase Requisitions: Guided Buying

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. Users can add items from Statewide Term Contract (STC) using the catalogs and Punchout catalogs or request an item(s) that is not on STC, which is called a non-catalog item.

I. Adding Catalog Items

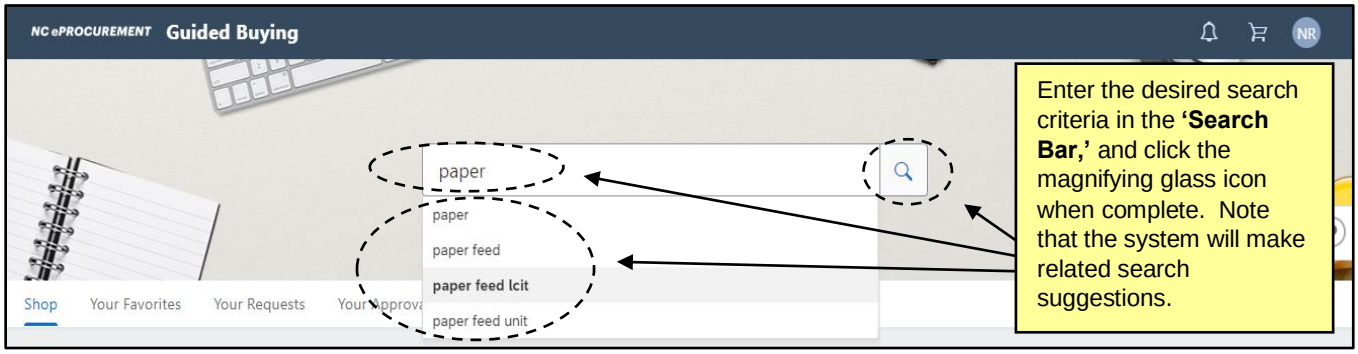
If an item appears in the NC eProcurement catalogs, it is on a Statewide Term Contract (STC) negotiated on behalf of the State of North Carolina's buyers by the Division of Purchase & Contract (P&C). Users may add catalog items to their PR by utilizing the catalog search functionality.

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.'**

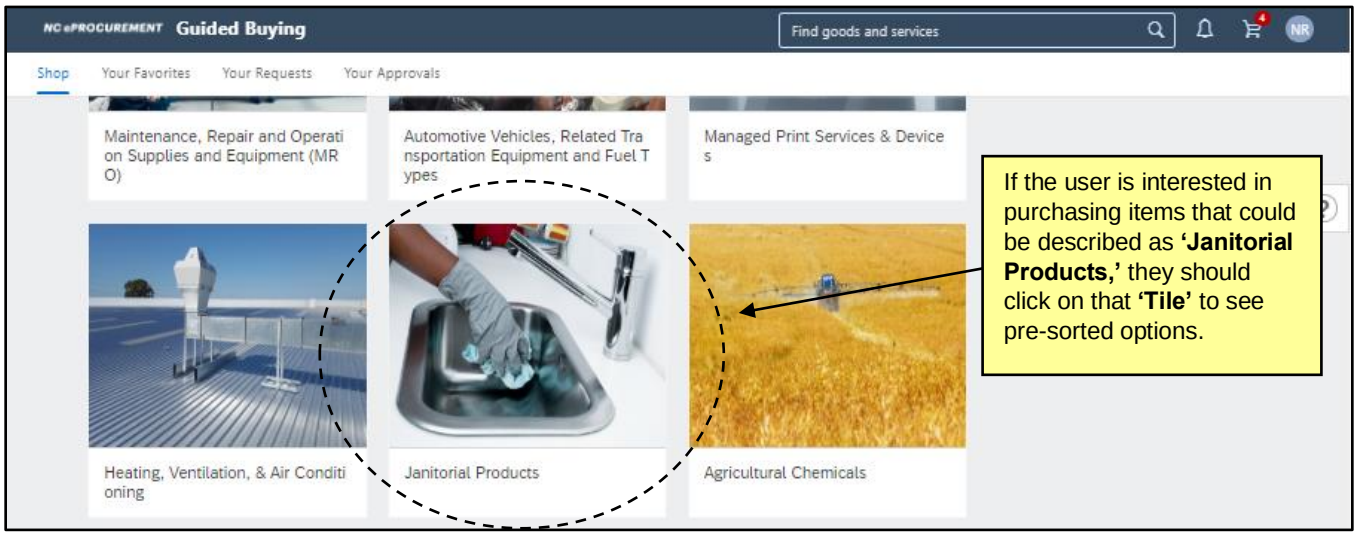


2. If using the **'Search Bar,'** enter the desired search criteria (i.e., **'Keyword,' 'Supplier Part #,' 'Manufacturer,' 'Statewide Contract ID,'** or **'Category'**) and click the magnifying glass or press **'Enter.'**

   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.'**

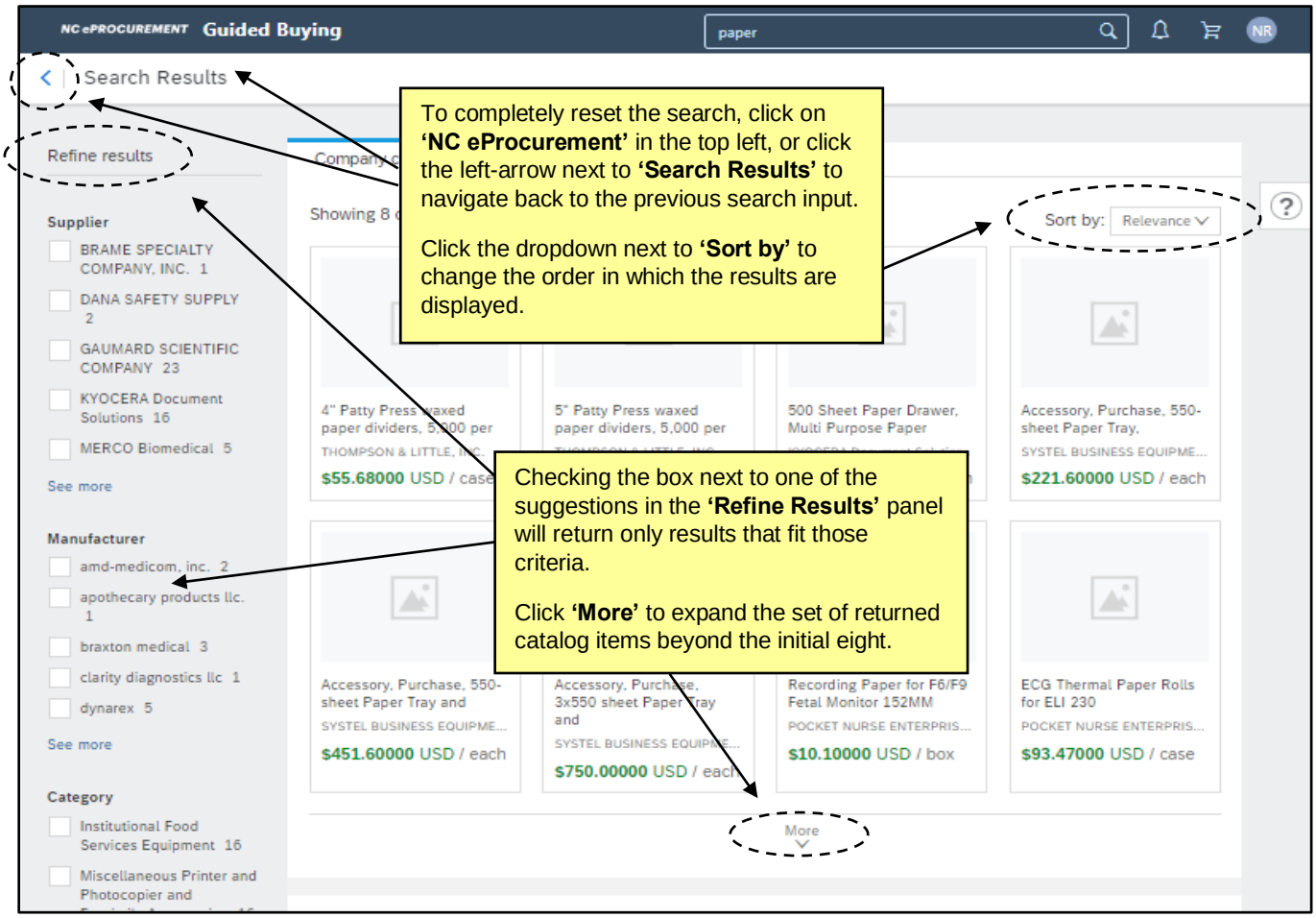
    a. **'Relevance'** places the items with the best or most complete match near the top.

    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.

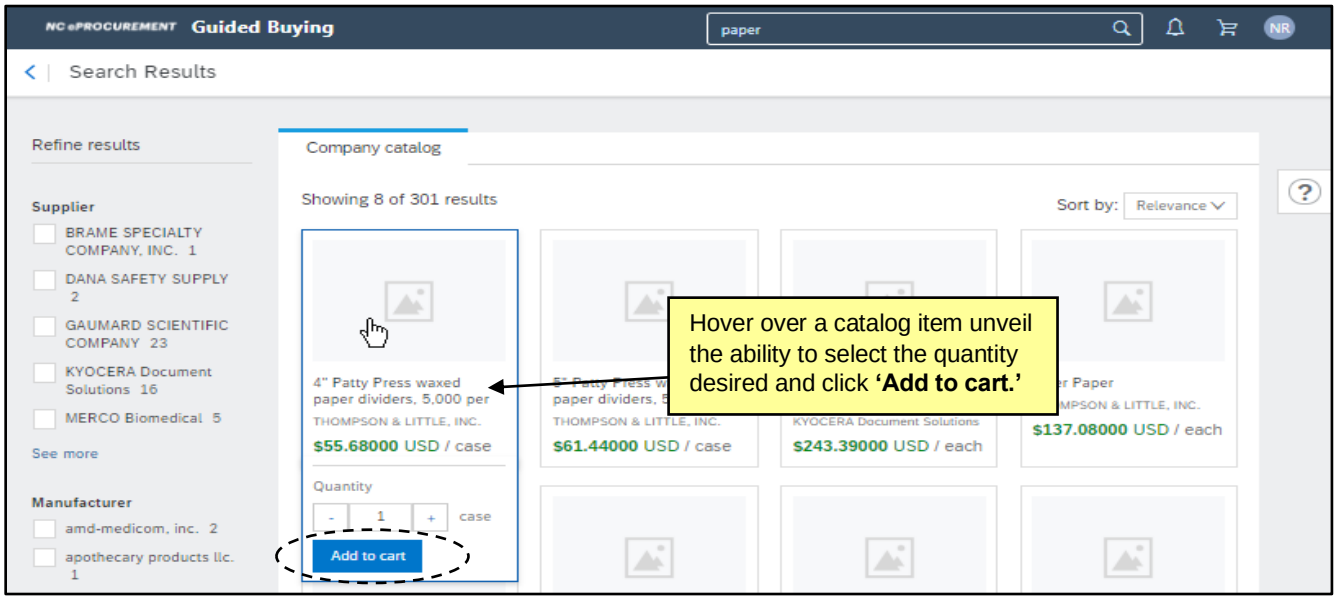
9. A maximum of eight catalog items will display on the results page. To unveil more results, click on **'More'** beneath the last result.



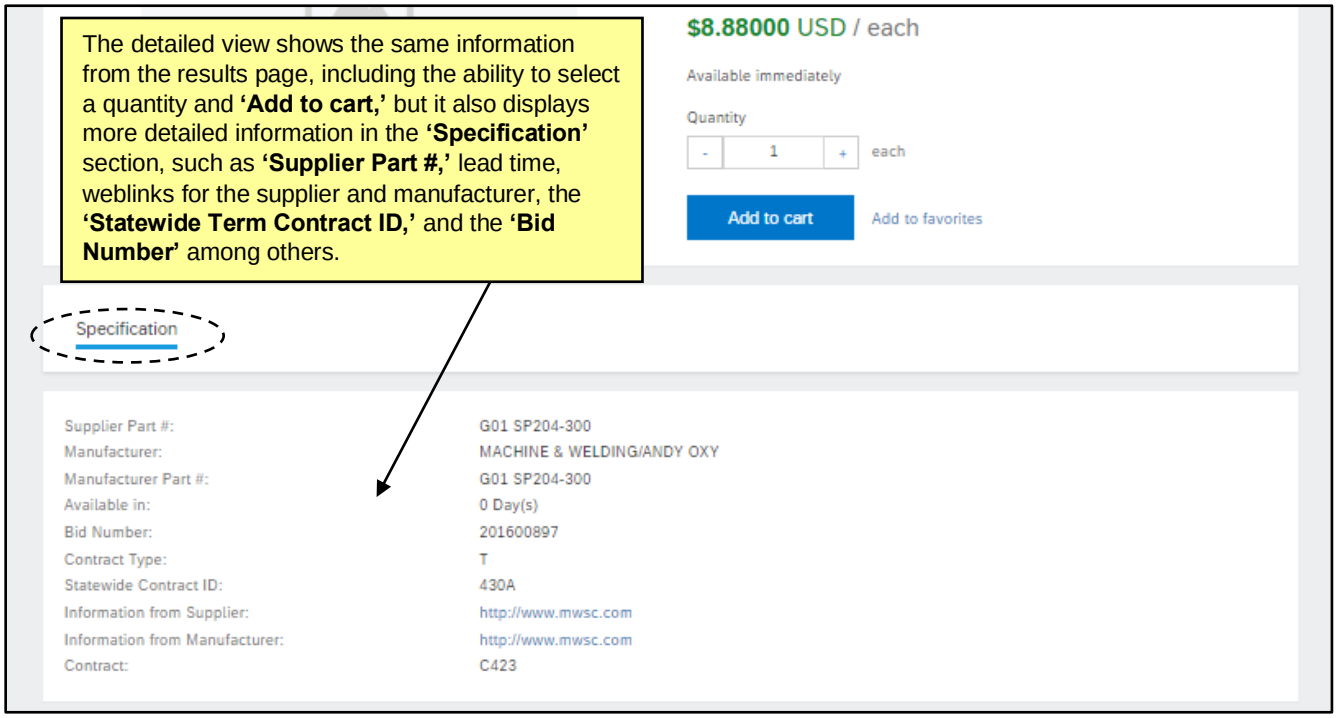
10. Each catalog item on the results page will provide a description of the item, the supplier of the item, the price of the item, and the unit of measure for the item.

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

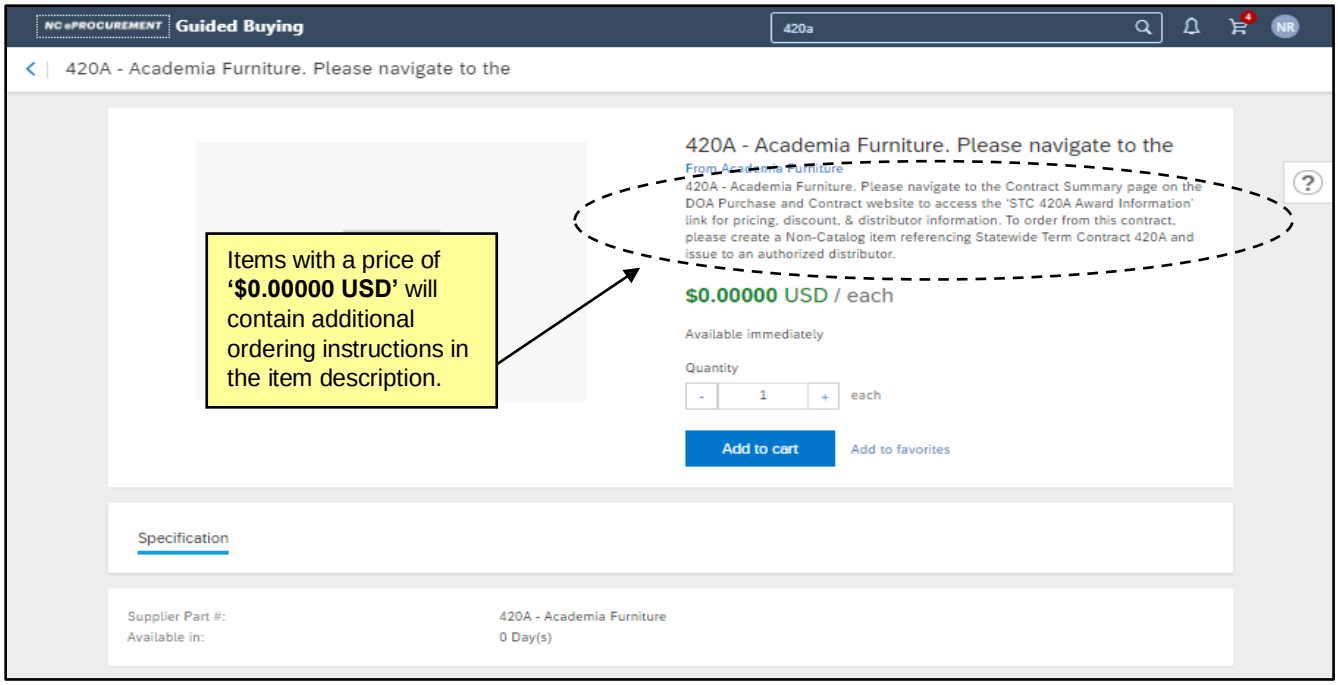
11. If the user hovers their cursor over a catalog item, it will be surrounded by an expanded blue rectangle with an option to select the quantity desired and click the **'Add to cart'** button.



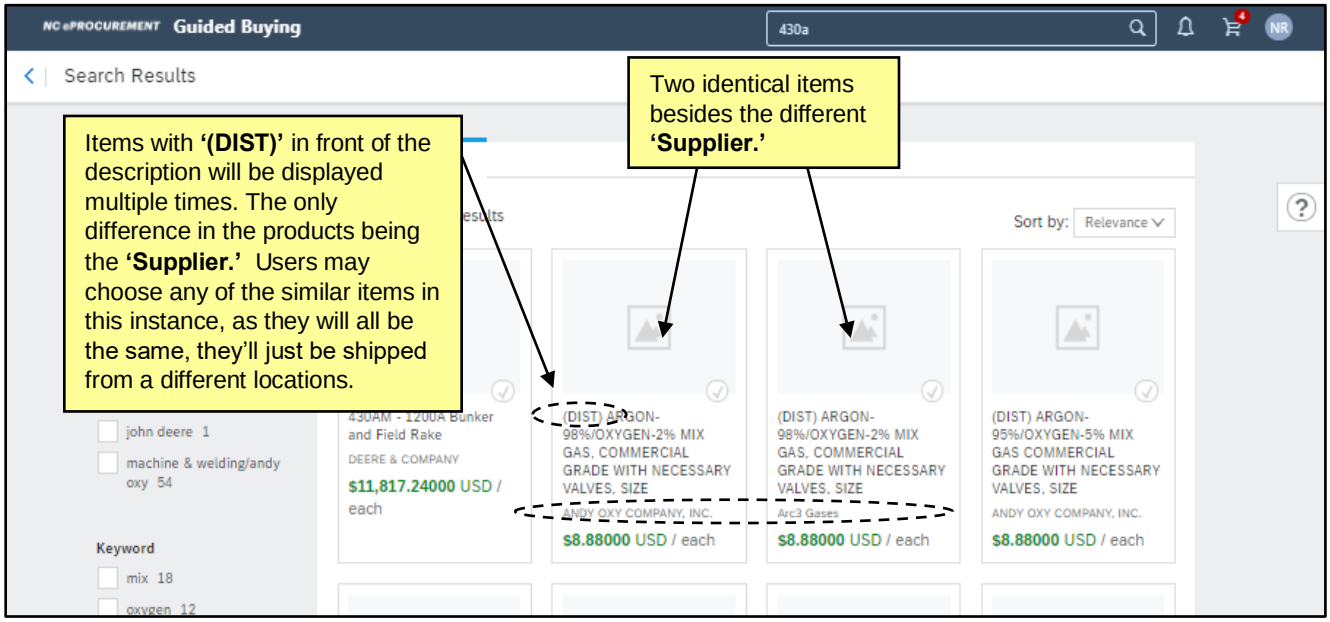
12. For more information about the item, click on it to display a detailed view.



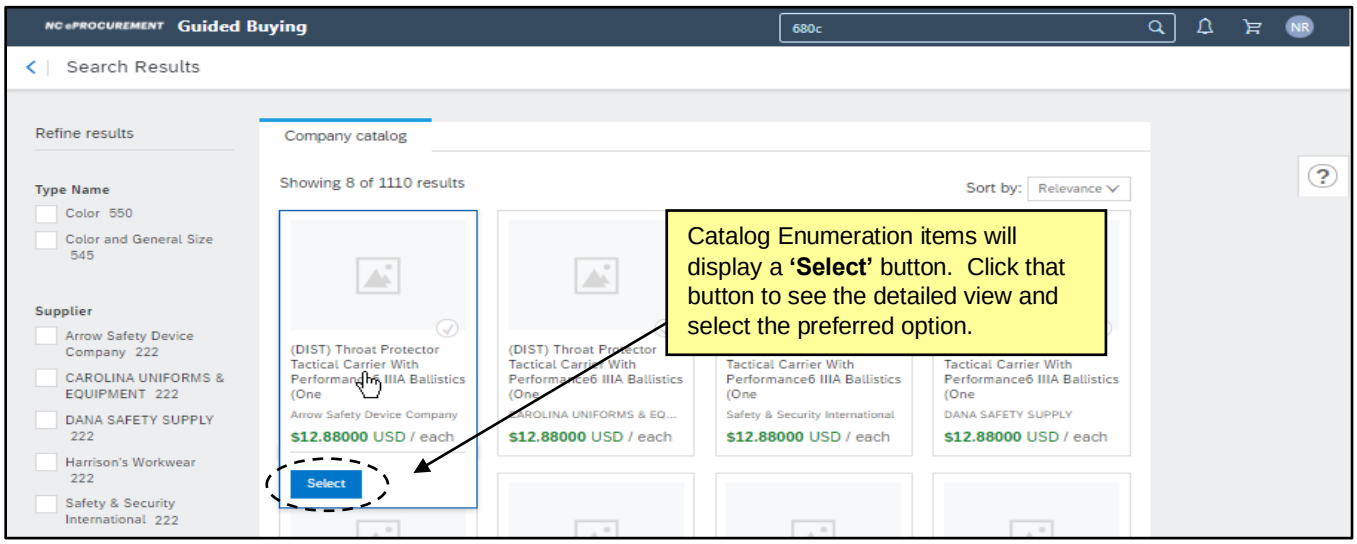
13. Some catalog items are placeholders for additional ordering instructions. Items containing additional ordering instructions will reflect a price of **'$0.00000 USD'** and will contain the necessary steps in the item description. Users should refer to those instructions when adding this type of item to their PR.



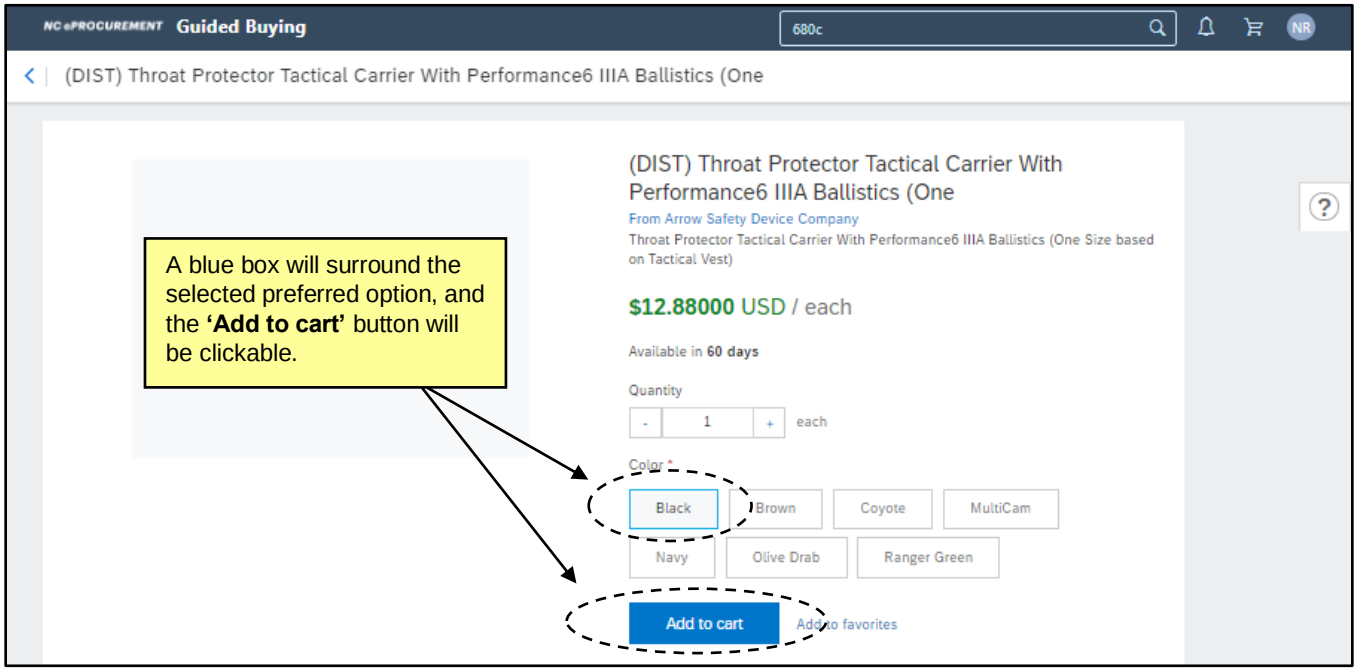
14. Items with **'(DIST)'** in front of their description indicate that the item is supplied by a distributor, not necessarily the STC vendor. Multiple seemingly identical catalog items will appear for the same product, but they will have different suppliers listed. The user may choose any of the items 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.



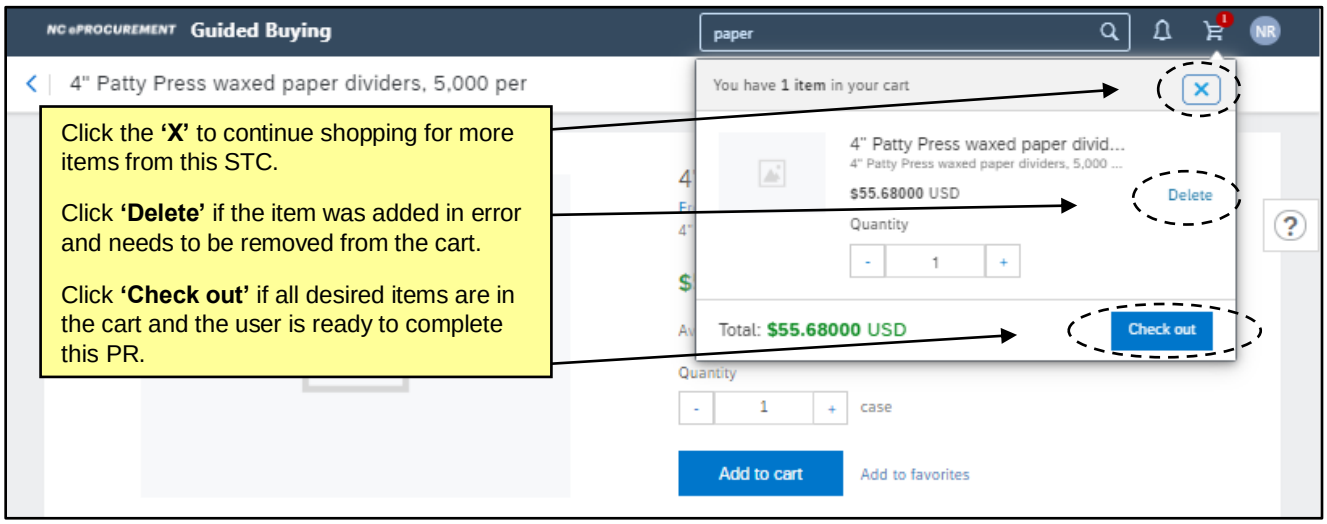
15. Enumerations are STC items that have specific attributes associated with them and that require the user to select a preferred option before the item is added to the Purchase Requisition (e.g., size, color, delivery options). When an Enumeration item is returned in a search, the user will not have 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.'**



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.



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.

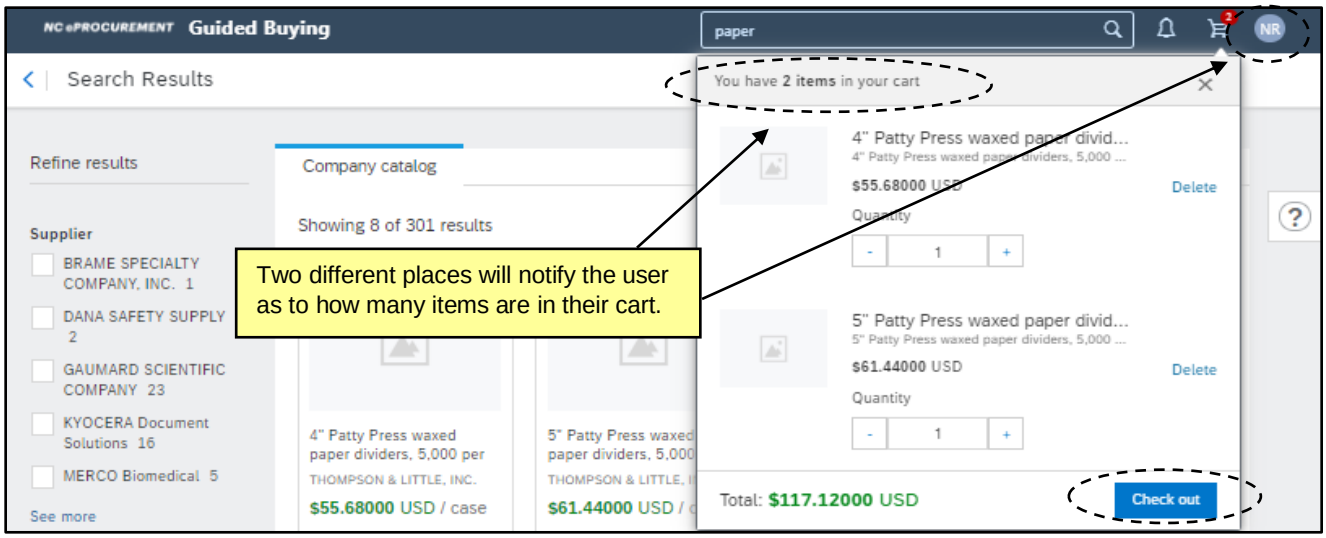


18. If multiple items are added to the cart, it will be reflected in the red bubble above the shopping cart icon and in the drop-down box. By clicking '**Check out'** at this point, all items listed will be added to the PR.

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.



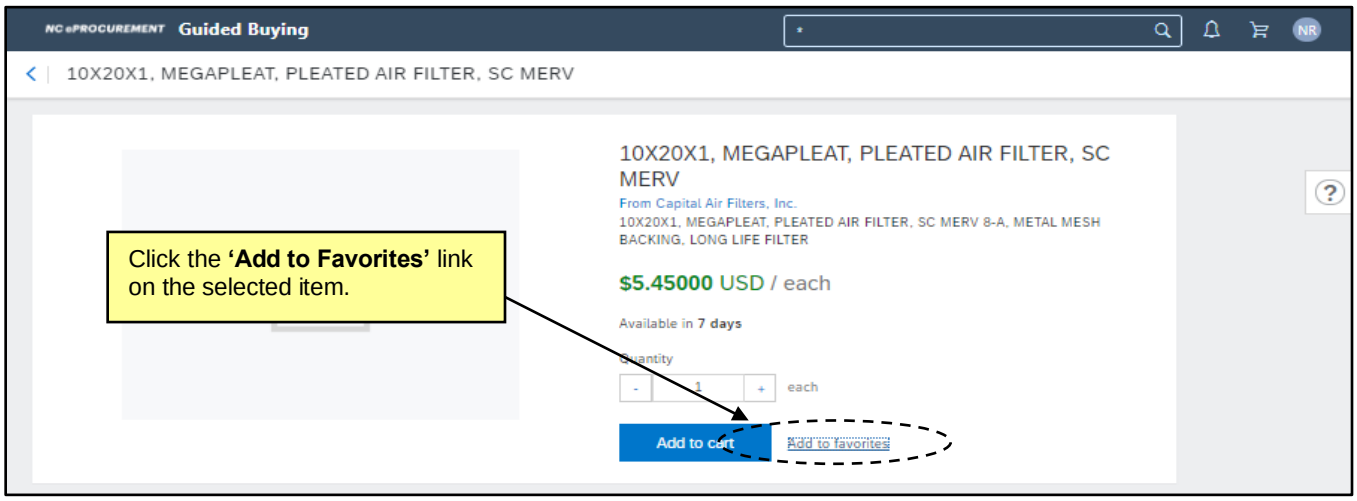
II. Adding Catalog Item Favorites

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.

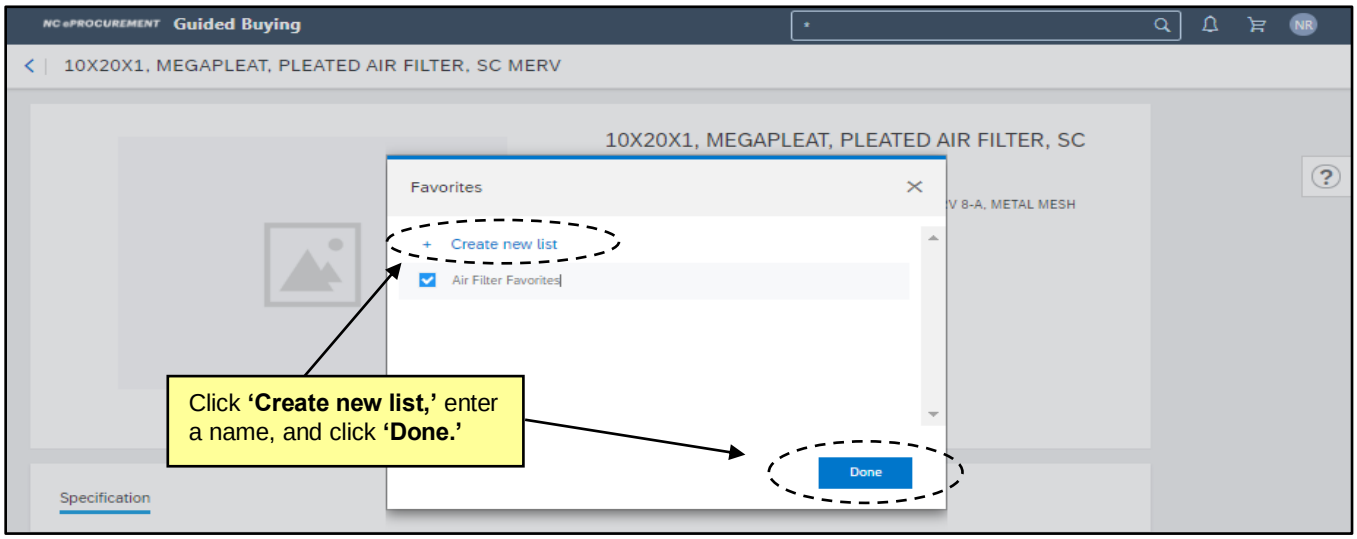
Note: 'Favorite Items' from Expert View do not carry over into Guided Buying and vice versa.

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

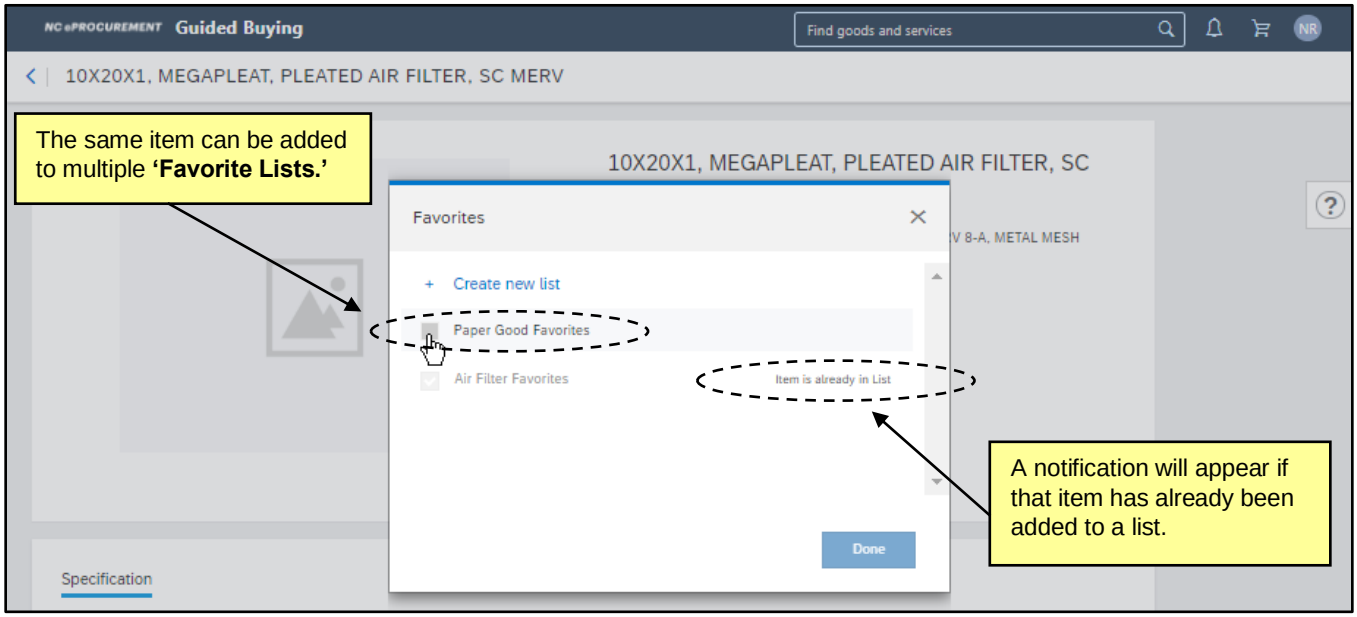
2. Click the **'Add to Favorites'** link.



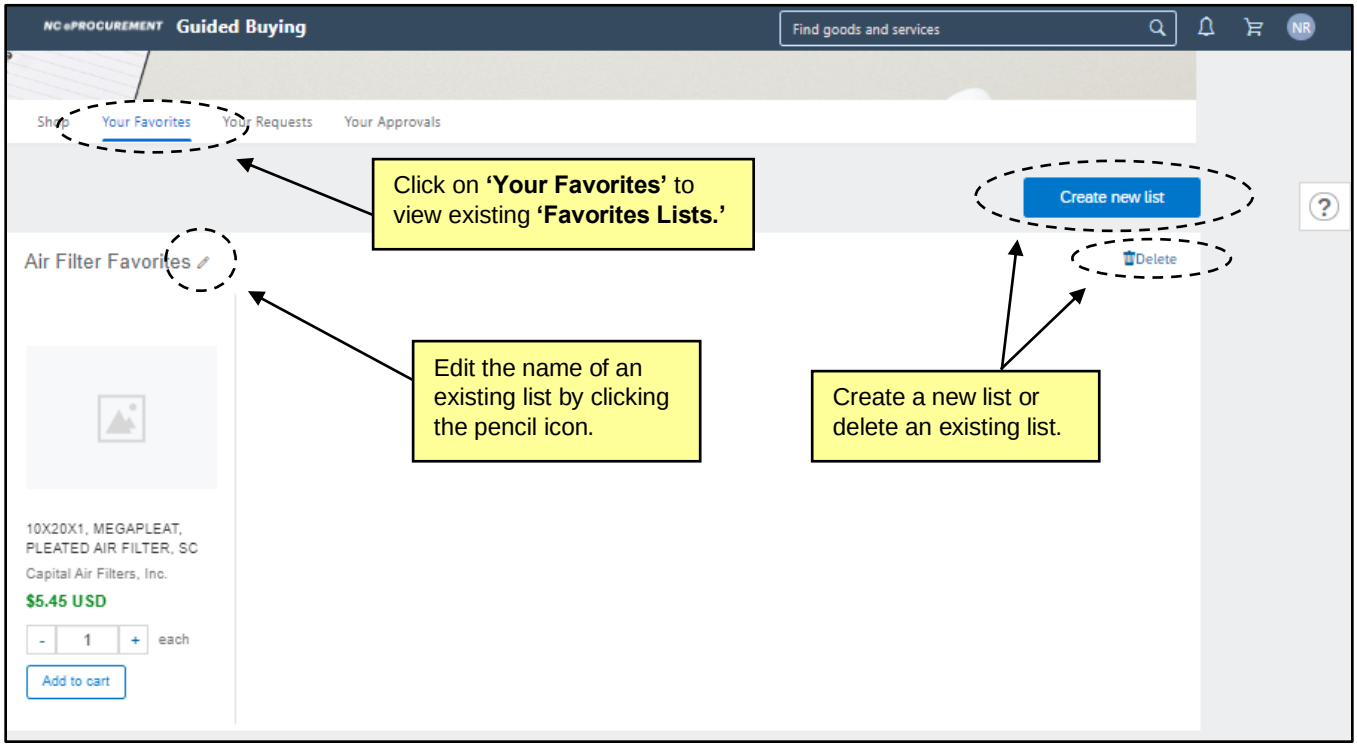
3. The **'Favorites'** popup will display. Click **'Create new list,'** type the name of the list, and click **'Done.'** The item will be added to that list.



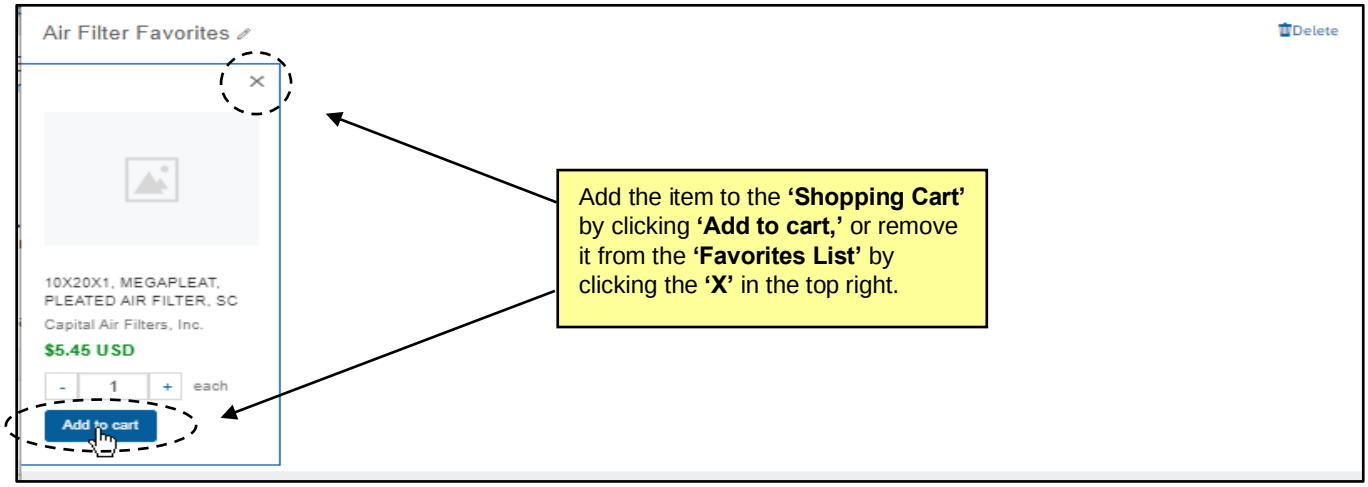
4. The same item may be added to multiple lists by checking the box next to each list and clicking the **'Done'** button. If the item already exists in a list, the user will receive a notification that the **'Item is already in List'** and that list will be unable to select.



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.



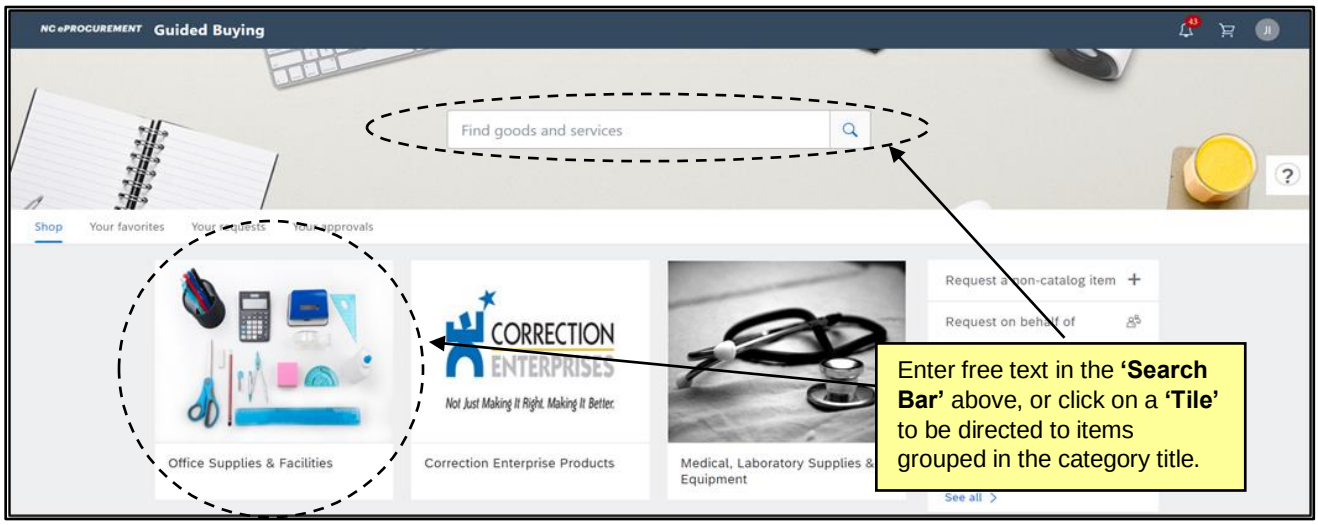
6. Add an item from a **'Favorites List'** to the cart by clicking **'Add to cart,'** or delete the item from the list by clicking the **'X'** in the top right corner of the item. A confirmation screen will appear asking the user if they are sure they wish to remove the item from the list, to which they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

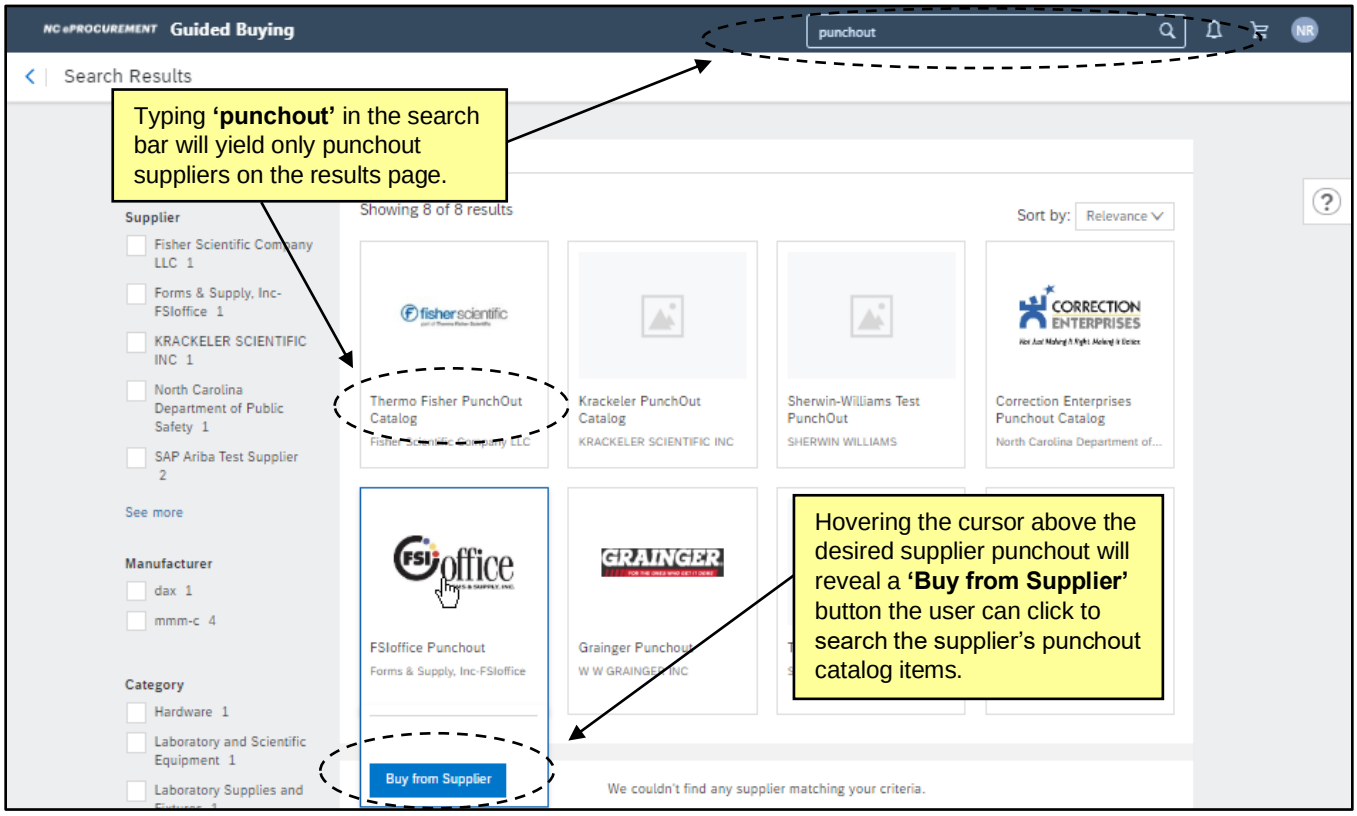


2. If using the **'Search Bar,'** users can enter the desired search criteria and click the magnifying glass or press **'Enter.'**

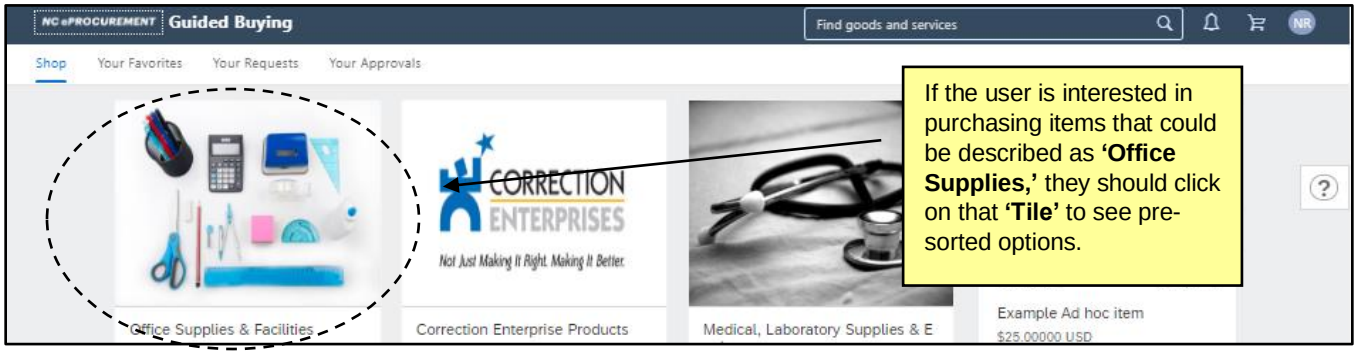
   Note: Searches by **'Category'** (ex: Office Supplies), **'Supplier'** (ex: FSI), or **'Statewide Contract ID'** (ex: 615A) will return results that may lead the user to a punchout catalog. Alternatively, if the user enters the keyword **'Punchout'** in the **'Search Bar,'** the only results returned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

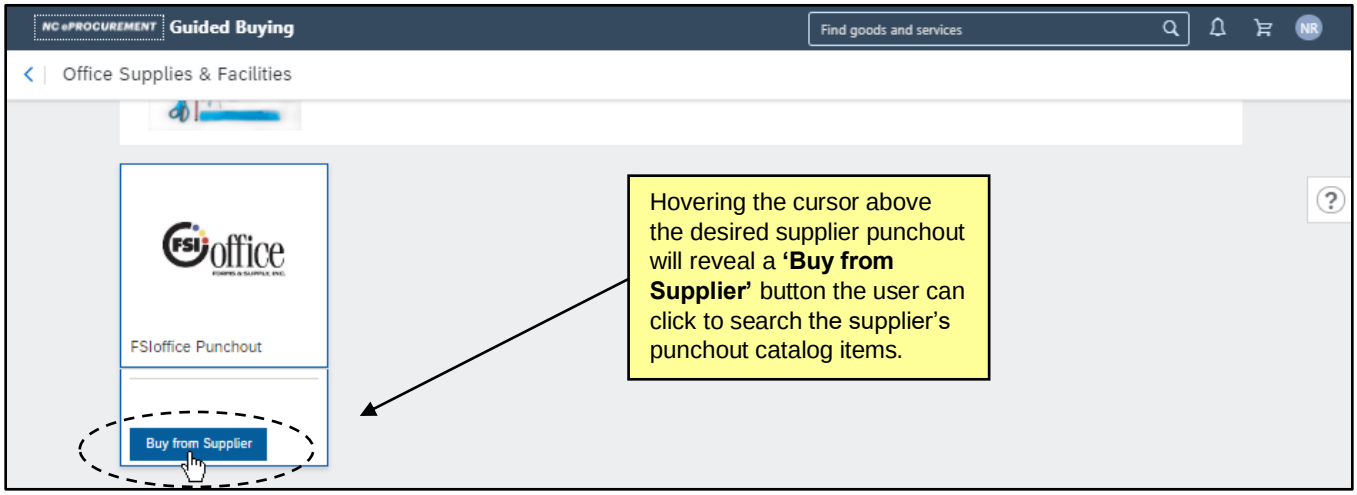
4. If the user hovers their cursor over the punchout catalog tile they wish to purchase from, it will be surrounded by an expanded blue rectangle and an option to click **'Buy from Supplier'** which will take the user to the supplier's punchout catalog.



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

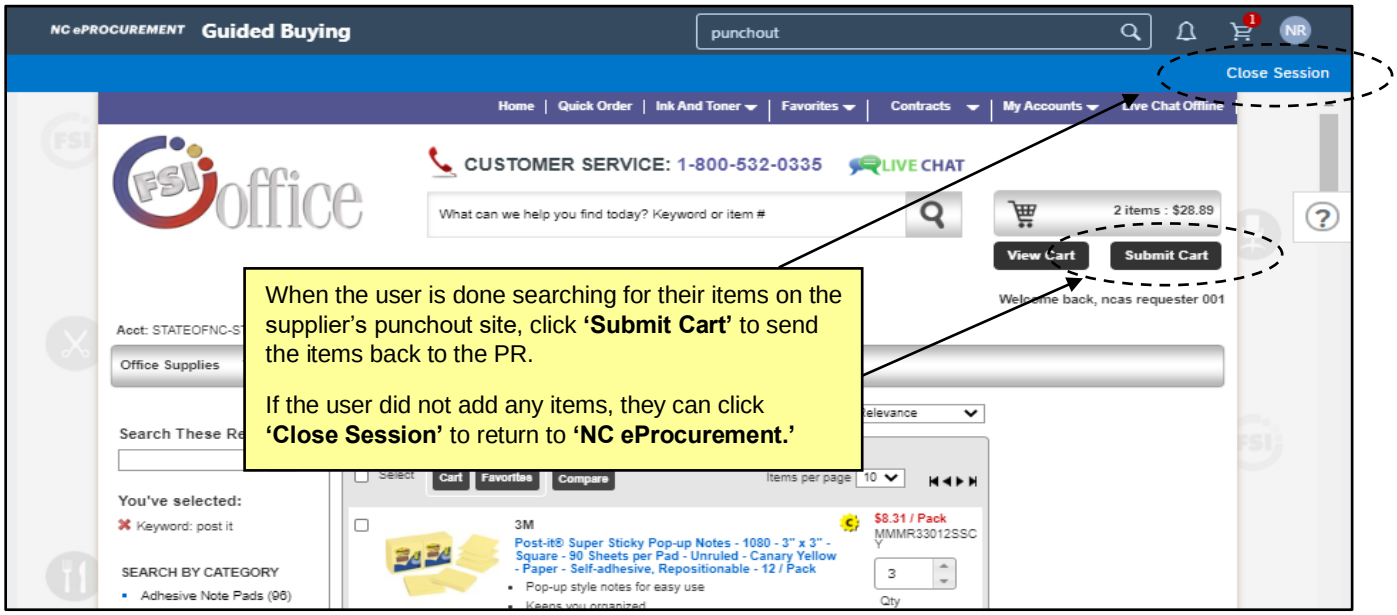


6. A sub-screen will appear with additional, more-specific **'Tiles'** to direct the purchase. If a punchout tile appears, hover the cursor above the tile and click **'Buy from Supplier'** to be taken to that supplier's punchout catalog.

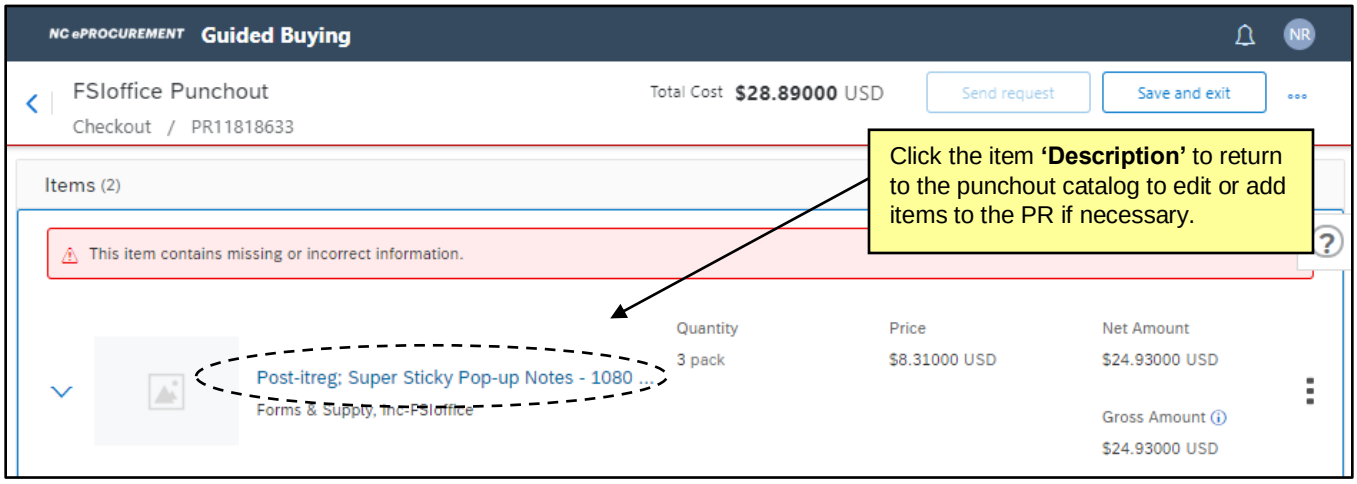


7. The user will be directed to the supplier's punchout catalog site. The page will still be branded with **'NC eProcurement'** at the top, but the content of the site will be maintained by the supplier. Since the individual supplier creates their own punchout site, each site may differ in appearance 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.'**.



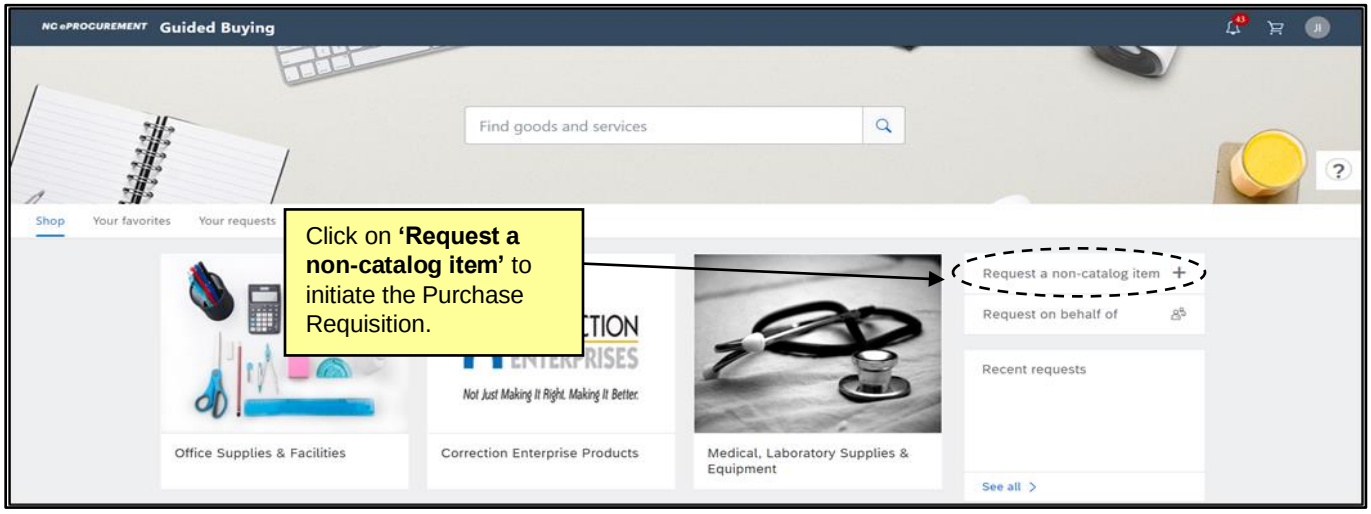
8. Once the punchout item(s) have been added to the PR, if there is a need to edit the quantity of the item or to add additional punchout items from that catalog, the user will have to make those edits back on the supplier's punchout catalog site and re-submit their cart. To access the site directly from the PR, click on the **'Description'** of any of the line items.



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).

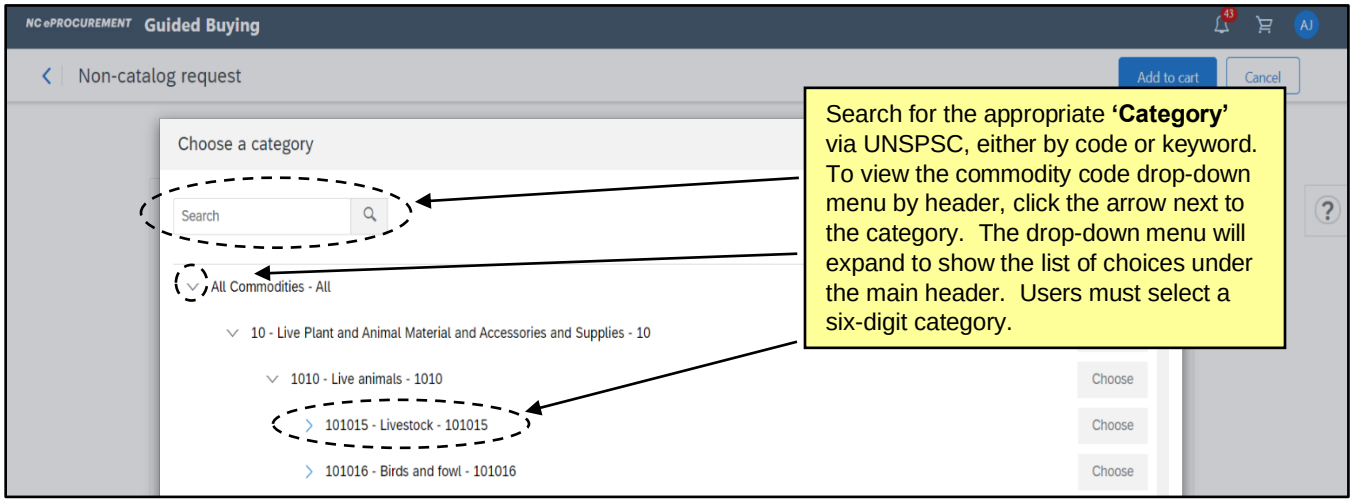
1. From the Guided Buying home page, click on **'Request non-catalog item'** to enter product information on the subsequent **'Non-catalog request'** page.



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 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).

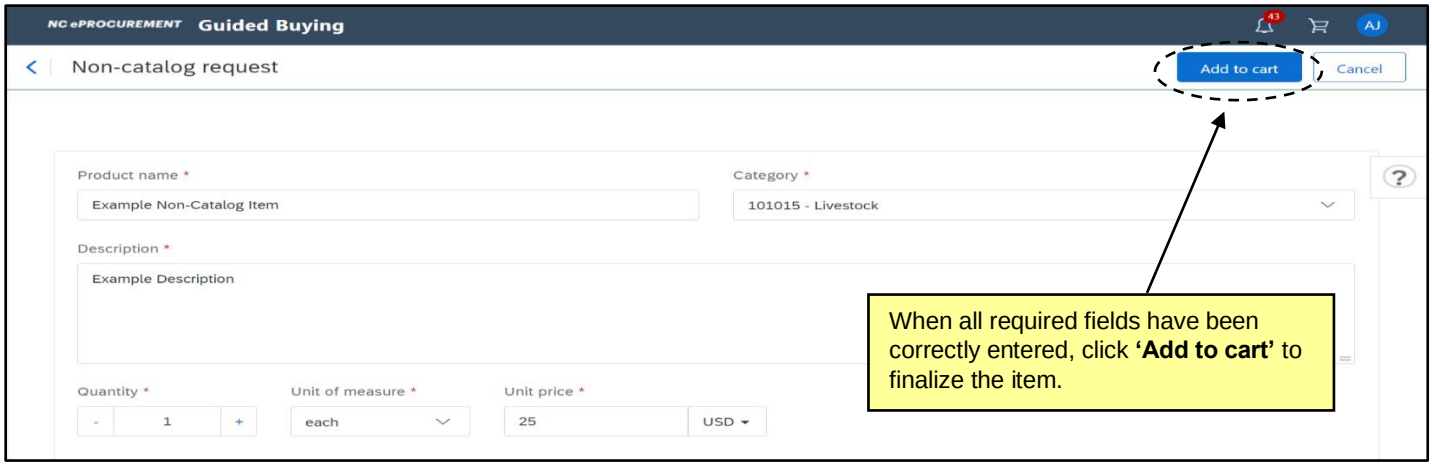
5. **Quantity:** Enter the appropriate Quantity. Add or subtract from the quantity by using the **'+'** or **'-'** buttons to either side of the free-text field.

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.

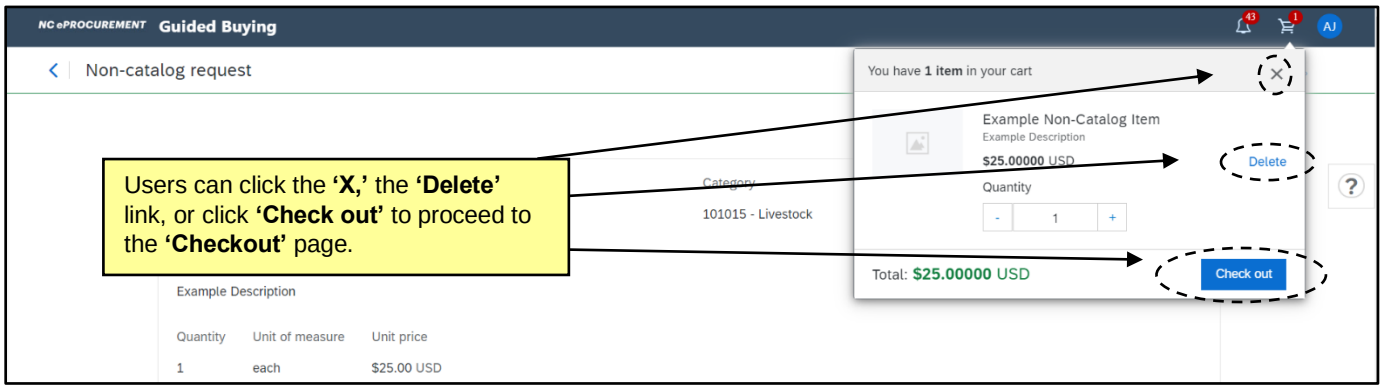
7. **Unit Price:** Enter the price of the item in USD.

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.

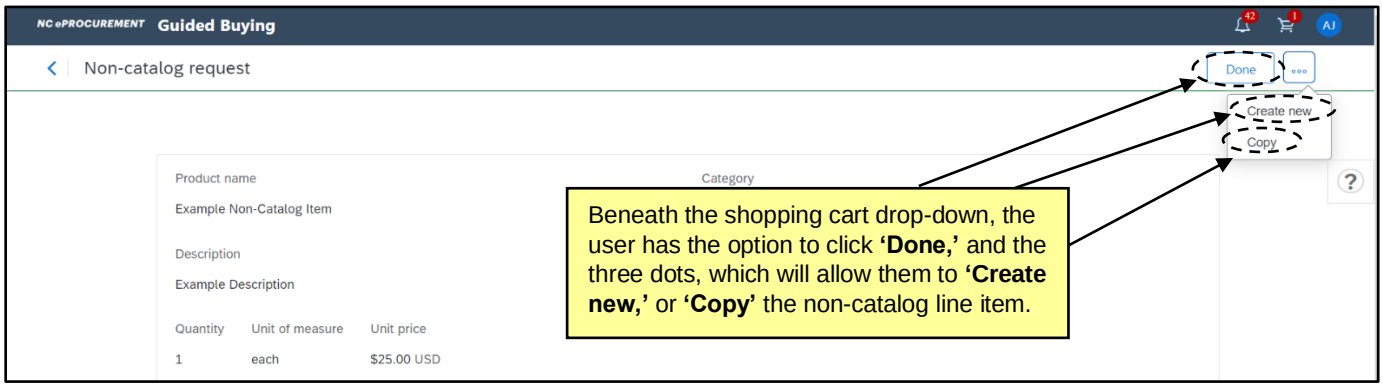
9. When all required fields are complete, the user can click the **'Add to cart'** button. If a field is incorrect or incomplete, it will be outlined in red and accompanied by an error message until it's corrected.



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.



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.'**



V. Selecting 'Unit of Measure' for Non-Catalog Items

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.'** If the values entered into the fields are not aligned correctly, an error message will display on the **'Blanket Purchase Order?'** field until they are properly aligned.

> **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.

	Unit of Measure		
Line Item Classification	**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.

When receiving this type of order, receive against the quantity ordered.

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.'**

When receiving this type of order, receive against the dollar amount.

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.'**

When receiving this type of order, receive against the dollar amount.

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.'**

When receiving against this type of order, receive against the number of hours.

VI. Checkout Page

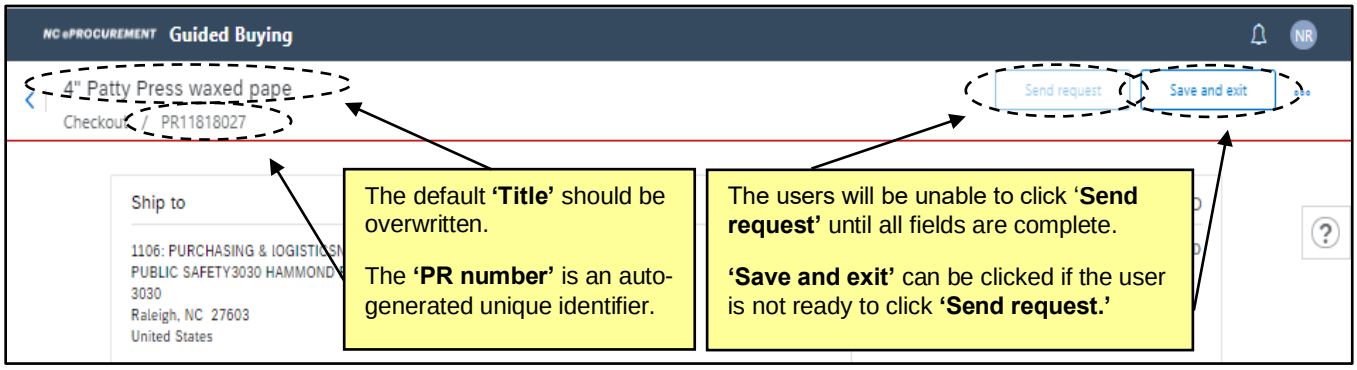
The **'Checkout'** page allows the user to enter or update the details required to finalize the Purchase Requisition (PR) before it is sent for approval. It displays once the user has clicked the **'Check out'** button in the shopping cart dropdown. Some fields are required while others are optional. 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.

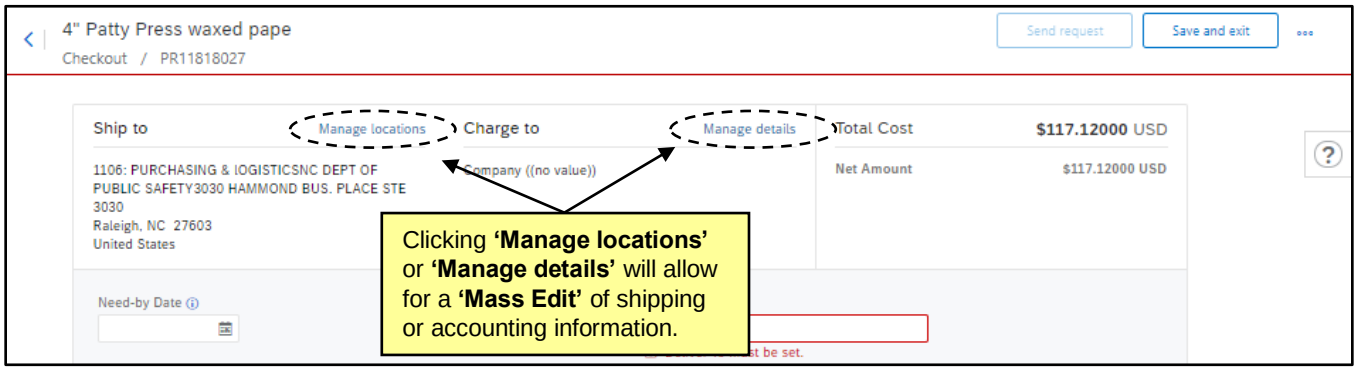
2. Below the **'Title'** the user will find the **'PR number,'** a unique identifier beginning with **'PR'** that is automatically generated by the system.

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 Cost.'** 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 **'Total Cost'** 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 **'Need-by Date'** field is transmitted on the PR to the supplier as the date by which the items need to be delivered. The calendar icon next to the field may be used to select the appropriate date.

8. 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.

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

10. 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.

11. The **'Delay Purchase Until'** field, allows the PR to be submitted and approved but not be distributed to the supplier until the date specified.

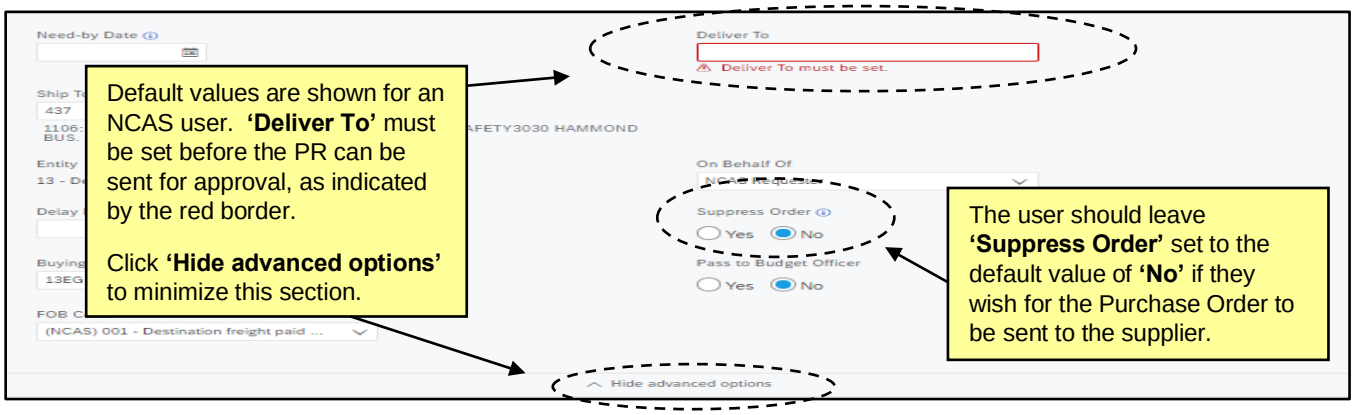
12. The **'Suppress Order'** field defaults to **'No,'** meaning that the purchase order, when created, will NOT BE SUPPRESSED and **will be sent** to the supplier. If the selection is switched to **'Yes,'** the supplier will **not** receive a copy of the purchase order.

13. The **'Buying Entity'** field will default to the buying entity that is selected in the user's profile. It can be updated using the **'Buying Entity'** drop-down menu. If the desired buying entity does not appear in the drop-down menu, select **'Browse all'** and search for the desired selection.

14. The **'Pass to Budget Officer'** field defaults to **'No,'** meaning the PR will stay on its normal approval path. If the selection is switched to **'Yes,'** the Override Budget Officer will be added in the approval flow to review the requisition and update the accounting information.

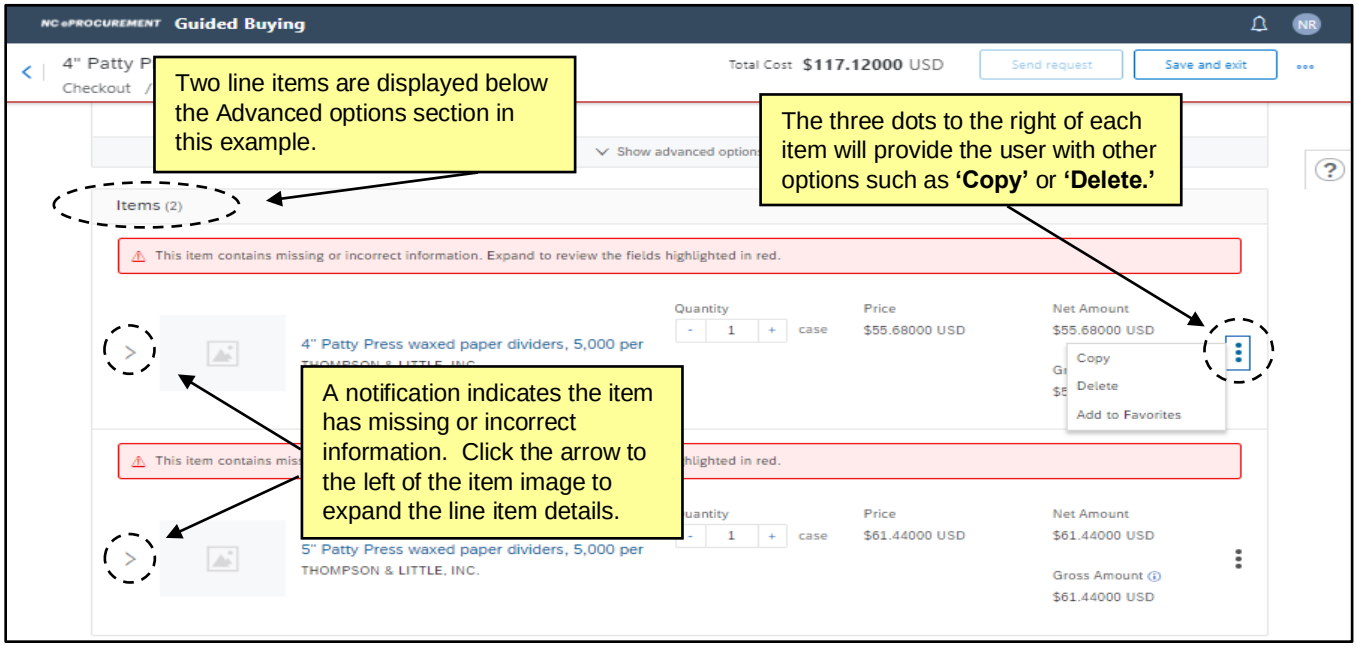
15. The **'FOB Code'** (Freight on Board) reflects how freight charges for the order are paid. This value defaults to **'(NCAS) 001.'** Users may select a different option that better meets the agency purchasing policies by using the drop-down menu.

16. 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.

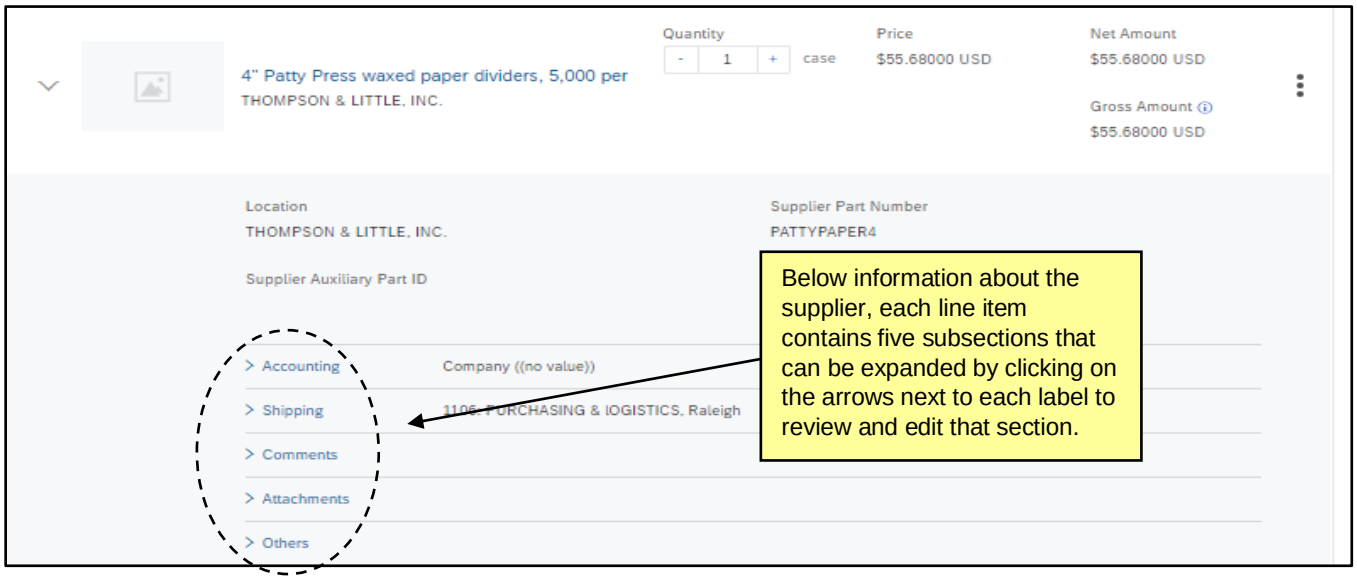


17. Below the Advanced options section, the line item(s) will display. If there are fields that need to be completed, a red notification will indicate at the top of each line item that there is missing or incorrect information. The user should click the arrow to the left of the item image to expand the line item details to review and update.

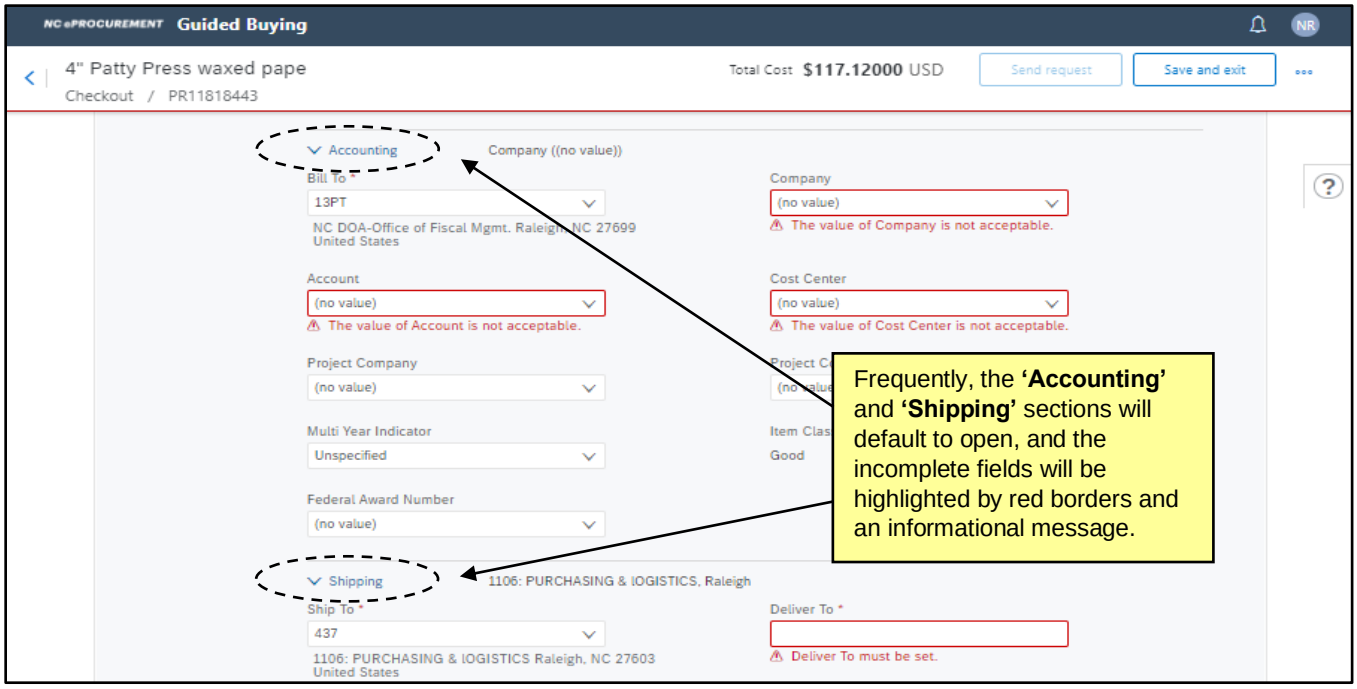
18. By clicking the three dots to the right of the line item, users will be presented with certain options depending on the type of line item. Standard catalog items will display **'Copy,' 'Delete,'** or **'Add to Favorites.'** Punchout catalog items will only have the option for **'Delete.'** Non-catalog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



19. 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.



20. 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.



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. **Company:** Defines a unique fund type within a reporting entity.

24. **Account:** Defines the purpose of the expenditure.

25. **Cost Center:** Defines the type of expenditures made by an individual cost center.

Notes:

- The **'Company,' 'Account,'** and **'Cost Center'** fields can be defaulted based on the values selected in the user's profile. The defaulted values can still be edited on each line item if it is necessary that they be changed.

- The **'Company,' 'Account,'** and **'Cost Center'** fields are generated to ensure only valid NCAS general ledger accounting combinations are selected in the dropdowns. The values in these fields must match a valid accounting combination. The system will not prevent a user from selecting an invalid combination in the dropdowns, but an error message will immediately display if the combination is not valid. If the selected accounting combination is not valid, users may have to back out all information from subsequent fields by selecting **'(no value)'** from the **'Search more'** menu. For example, to update the **'Company'** field users may have to set the **'Account'** and **'Center'** fields to **'(no value)'** first.

26. **Project Company:** Defines a unique fund type within a reporting entity for a purchase order that requires funds to be encumbered over multiple years.

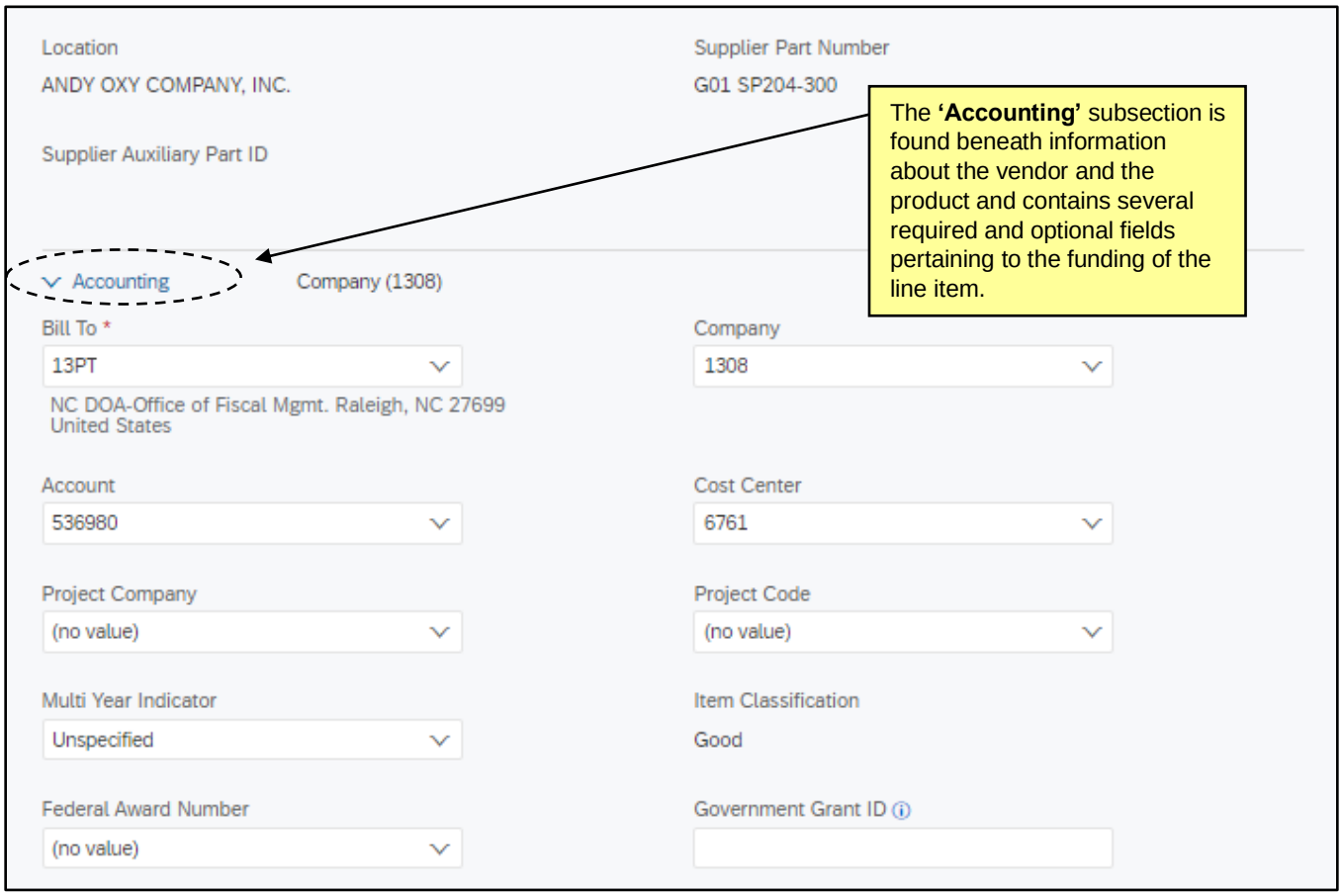
27. **Project Code:** Use the drop-down menu to select the appropriate project code.

28. **Multi Year Indicator:** Defines the fiscal year for which the funds on this PR should be encumbered.

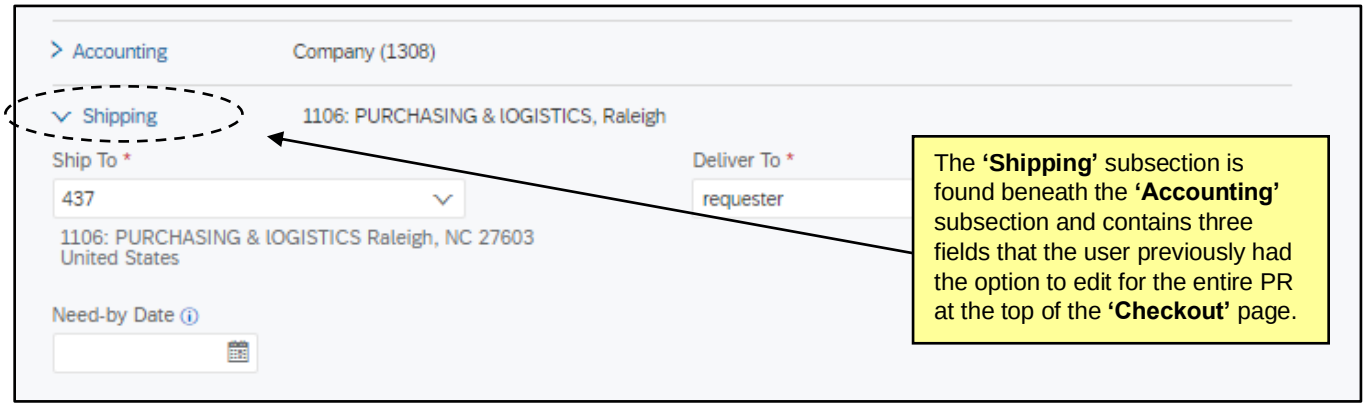
29. **Item Classification:** Set by commodity code and cannot be changed. A 'good' commodity code will set the Item Classification to **'Good'** and a 'service' commodity code will set the Item Classification to **'Service.'**

30. **Federal Award Number:** Select the applicable Federal Award Number from the drop-down menu or select **'Browse all'** to view a complete list of federal award numbers if applicable to the purchase.

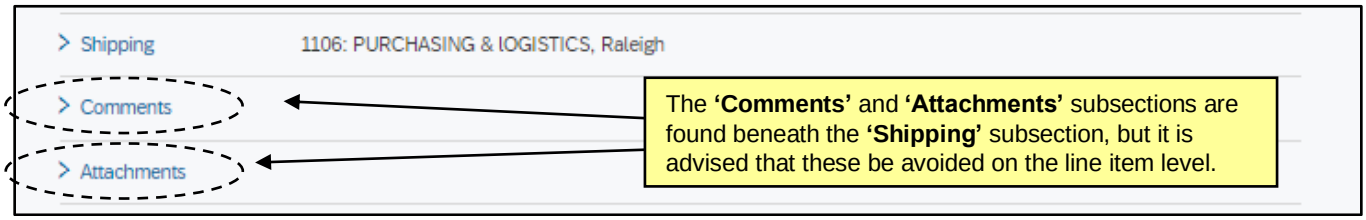
31. **Government Grant ID:** This field is only present in when certain accounting combinations are selected. It is a free text field where the user can enter in the details of any State grants awarded to their organization if applicable to the purchase.



32. Within the '**Shipping'** subsection, the user will find the **'Ship To,' 'Deliver To,'** and **'Need-by Date'** fields that they had the option 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.



33. It is possible to add **'Comments'** or **'Attachments'** in those respective subsections on a line item level, but it is strongly advised that they are **only added on the requisition level** (instructions on this can be found in a subsequent section) in order to make them more easily visible to the supplier.



34. 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.'**

35. **Terms of Payment:** This field defaults to **'N30'** and can only be edited by a user with the **'Purchasing Agent'** role.

36. **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.

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

38. **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. **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.

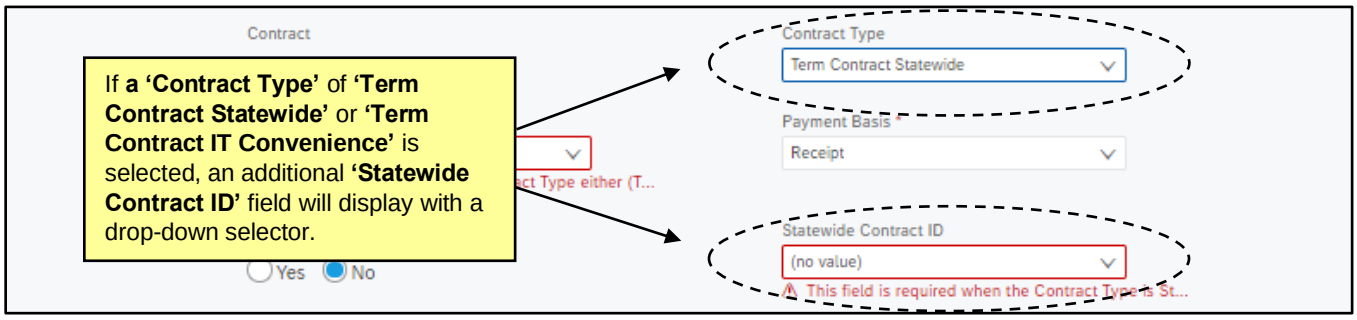
b. **Term Contract Agency Specific:** A contract for goods or services negotiated by a specific Agency to cover a specific period of time. These items are not available via the catalogs.

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.

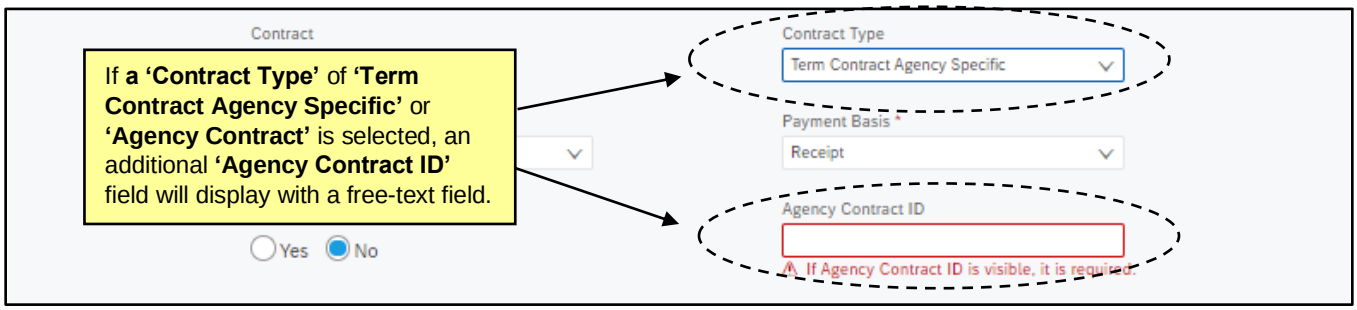
d. **No Contract:** The item is not associated with any contract. This is the same as **'No Choice,'** so it is not necessary to select this if the user leaves **'No Choice'** as the default.

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.



Note: 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.



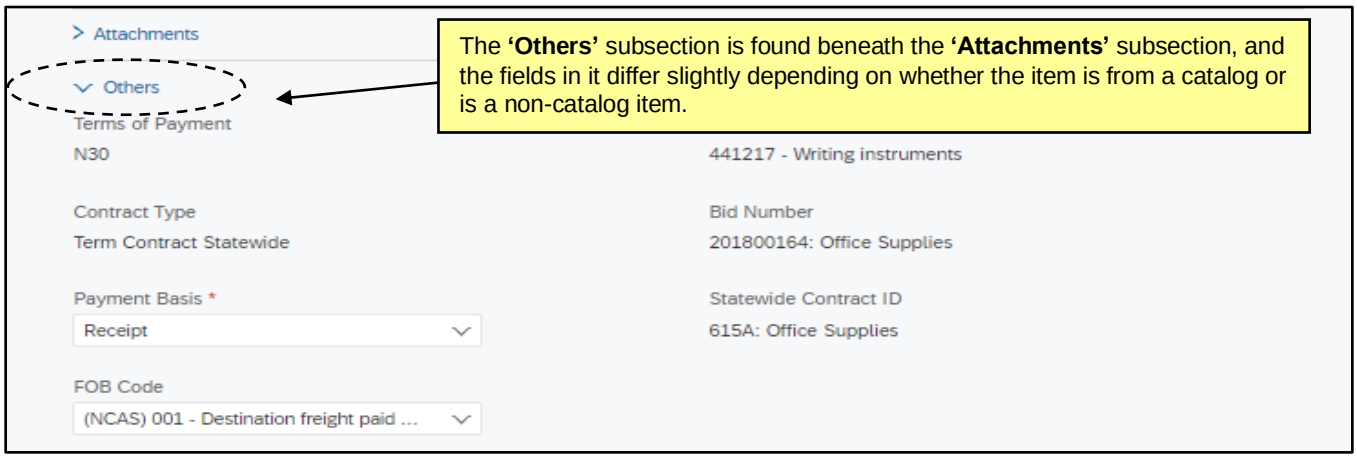
39. **Bid Number:** This field is not editable for catalog items, but on Non-catalog items it will default to **'(no value)'** and is optional unless the user selects a **'Contract Type'** of **'Term Contract Statewide'** or **'Term Contract IT Convenience.'** If the user does select one of those options, they should then select the appropriate **'Statewide Contract ID'** from that dropdown. A red box around the **'Bid Number'** field will direct the user back to this field, where they can click the drop-down arrow, click **'Browse all,'** and they'll see the bid number that corresponds with the specific **'Statewide Contract ID'** they selected. There should only be one option to select, and the use should add it to the PR by clicking **'Choose.'**

40. **Payment Basis**: Defaults to **'Receipt'** (for goods) or **'Signature'** (for services) based on the Unit of Measure specified. **'PO'** can also be selected from the dropdown menu. This information is passed to NCAS to determine the payment basis in NCAS.

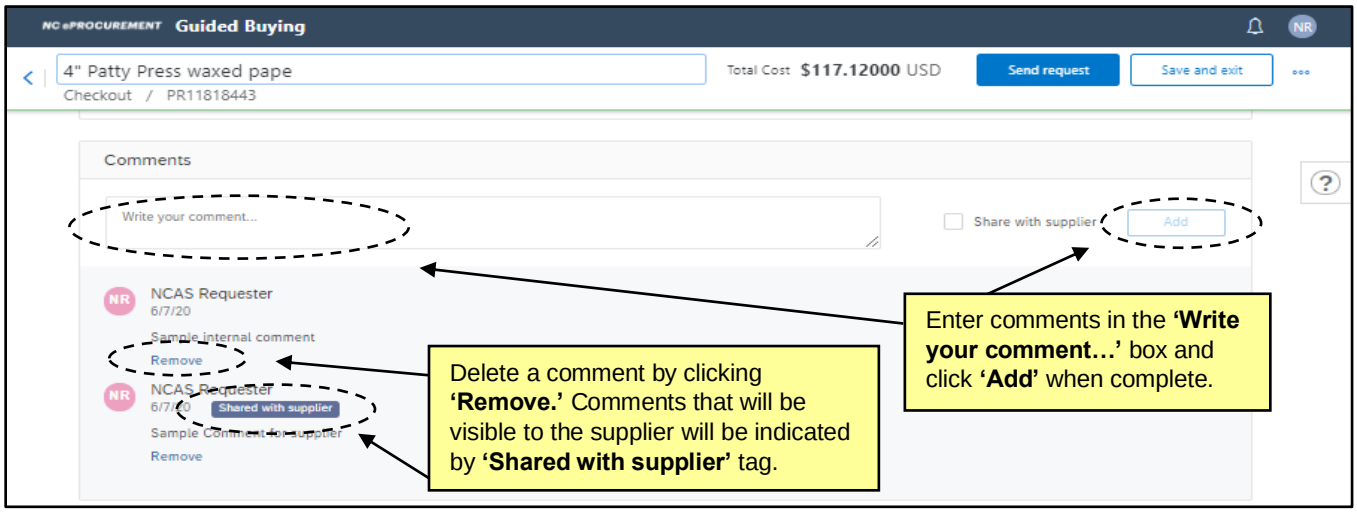
41. **Blanket Purchase Order?:** Choose whether the purchase is a Blanket order or a Non-Blanket order. This will default to **'No'** for Non-Blanket, but the selection can be switched to **'Yes'** if necessary.

42. **FOB Code:** This field defaults for all orders, and the user had the option to previously edit this for the entire PR in the **'Advanced Options'** section at the top of the **'Checkout'** page. If the user needs to alter this code on a per-line basis, they can do this here, but it is advised that these fields remain consistent across all line items.

43. **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.



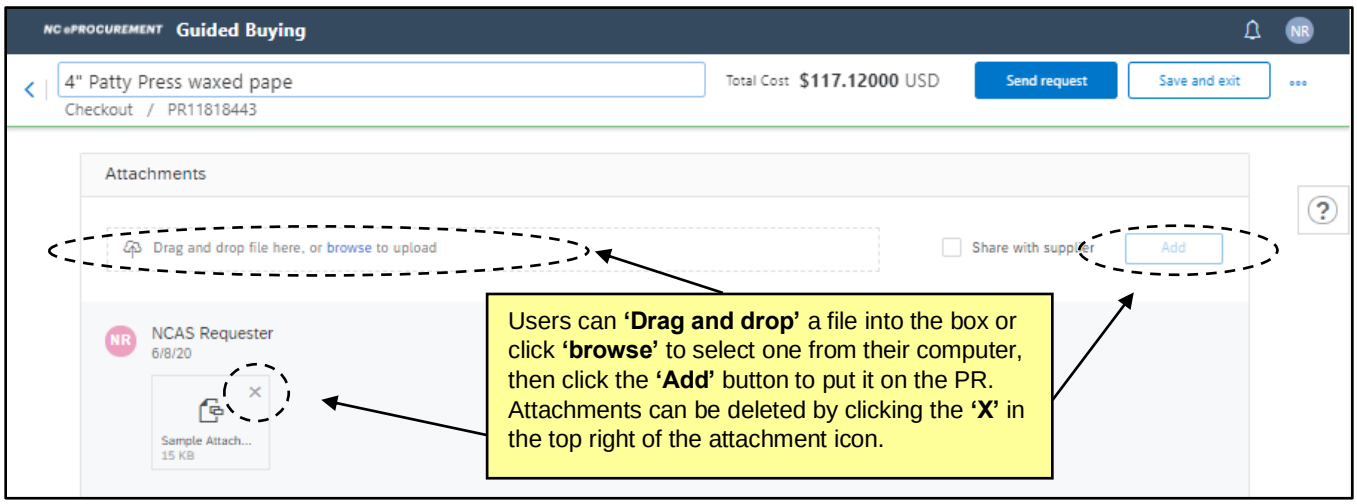
44. To add a comment at the requisition level, the user should type their note in the **'Write your comment…'** box in the **'Comments'** section below the line items. The **'Add'** button will become clickable, and the user should click in the **'Share with supplier'** box if they wish for the supplier 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.'**



45. 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.

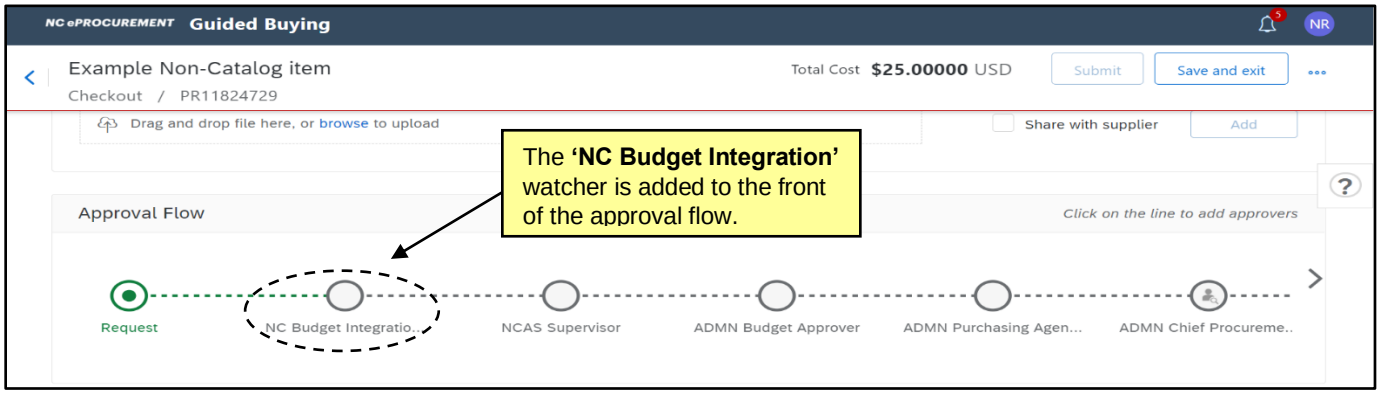
    Notes:
    - The following file types are acceptable as attachments: .bmp, .csv, .doc, .docx, .dotx, .gif, .htm, .html, .jpeg, .jpg, .pdf, .png, .potx, .ppsx, .ppt, .pptx, .ps, .rtf, .sldx, .txt, .xls, .xlsx, .xltx, .xml, and .zip

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



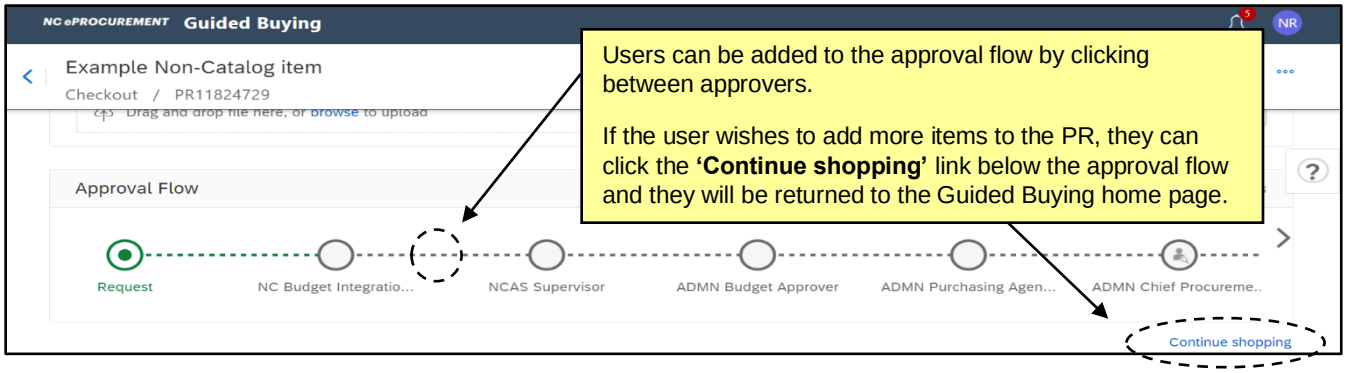
46. The system generated approval flow will be visible in the **'Approval Flow'** section.

    Note: The first object shown in the approval flow will always be **'NC Budget Integration'** (unless the user selects **'Yes'** for **'Pass to Budget Officer'**). This is a system-generated approval group that exists to check for pre-encumbrance with NCAS. If sufficient funding exists, this automated approver will take no action and the PR will immediately transfer to the next approver listed, in this case **'NCAS Supervisor.'** If the PR fails the pre-encumbrance check, the PR will go to **'Denied'** status and the user will have to click **'Withdraw'** then **'Edit,'** to make the necessary changes so that it can be reevaluated. This will be recorded in the **'History'** tab, as well as an auto-generated comment.

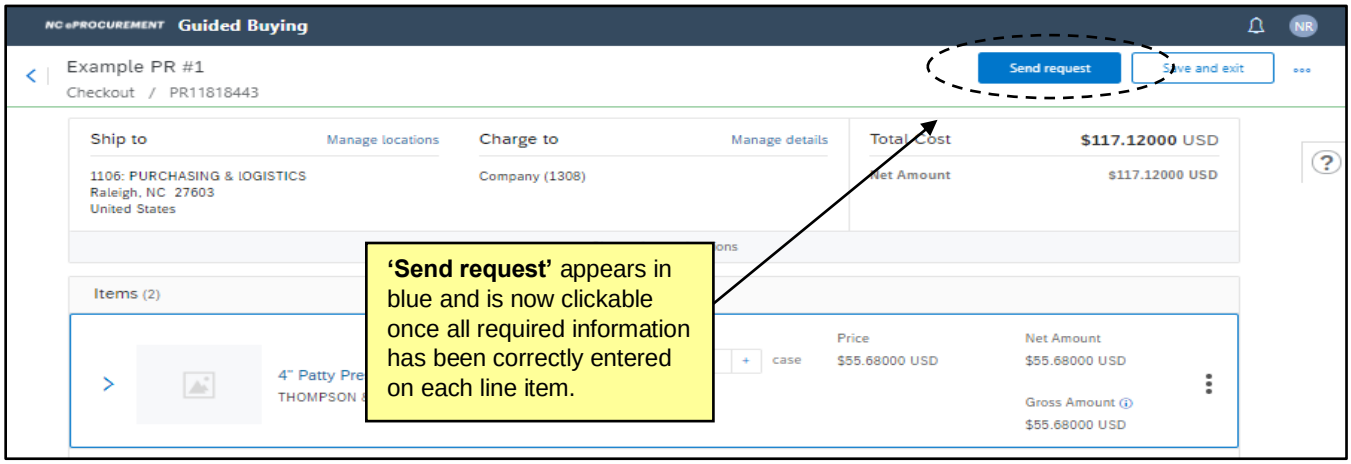
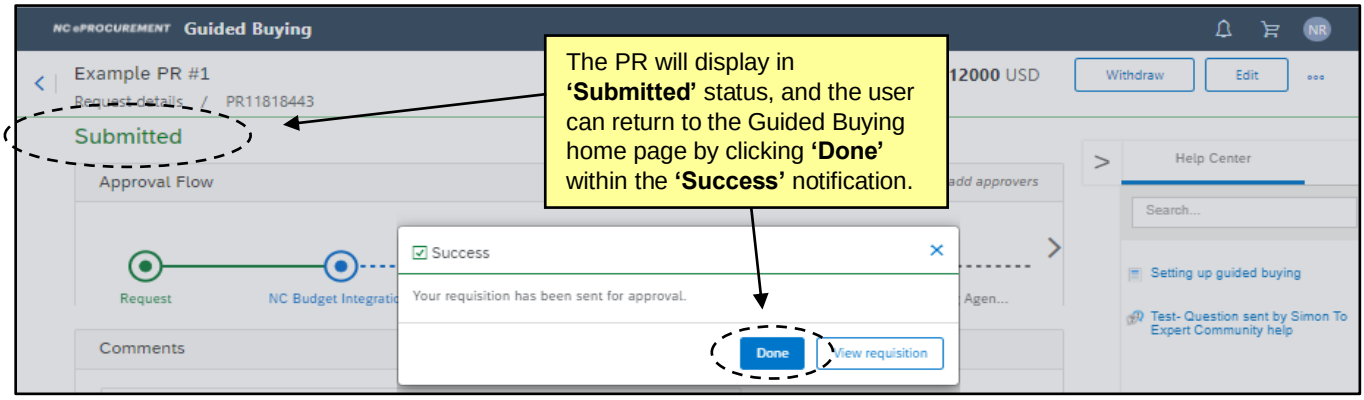


47. Users can manually add additional approvers by clicking between existing approvers and selecting the desired approver from the dropdown.

48. 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.



49. 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.



50. 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.