EPLite Editing Line Item(s) Process Guide

This process guide provides instruction on the functional steps to edit line items on an eRequisition for users with Community Colleges and School Systems. To edit existing line items values or add additional line item information, such as accounting codes, users can edit the line item from the Summary page.

I. Editing a Single Line Item

1. Place a checkmark in the box beside the line item to edit and click **'Edit.'**

2. The **'Line Item Details'** page displays. All details related to this line item are shown on this page, where users may update the necessary information about this line item.

3. For EPLite entities, the **'Tax Rate'** field defaults to the value set by the entity but can be changed using the drop-down menu.

4. **'Item Classification'** is 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.'

Note: The **'Inventory ID'** and **'Recycled Code'** fields are visible to SunPac users only.

Note: The fields that can be edited by a user are determined by the line item type (non-catalog, catalog, or punchout).

5. Click the drop-down menu of the field that needs to be updated. If the appropriate choice is not displayed as a recent selection, select **'Search for more…'** to view the full list of available selections. Below, **'Commodity Code'** is used as an example.

6. If **'Search for more...'** is selected, a pop-up window will appear. This pop-up window allows users to search for and select the appropriate information for the line item.

7. To select a value for the field that is being edited, click the **'Select'** button next to the appropriate value.

8. Users can also search for the appropriate value by typing directly in the associated field.

If the correct choice does not appear as a recent selection, the user can type a value into the field and press the **'Enter'** key to search based on what has been entered in the text field.

9. Search results matching what the user typed into the field will appear in a pop-up window. Review the results and click **'Select'** next to the appropriate value.

10. Users can also edit accounting and shipping information on the **'Line Item Details'** page.

11. For accounting and shipping information, editable fields are uniform across all types of line items.

12. **Account Type** – Defaults to **'Expense'** and should not be modified.

13. **Bill To** – Defaults from the user's profile but can be modified using the drop-down menu.

14. **Account Code** – The appropriate Account Code should be entered in the free-text field.

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

15. **Ship To** – Defaults from the user's profile but can be modified using the drop-down menu.

16. **Deliver To** – Defaults from the user's profile but can be modified using the free text field.

17. **Need-by Date** – Enter the date for the items to be delivered if necessary.

18. **Shipping Method** – Using the drop-down menu, select the appropriate shipping method.

19. **FOB Code –** Select the FOB (Freight on Board) code using the drop-down menu.

20. **Terms of Payment** – The Terms of Payment default to what has been selected under the **'Shipping - Entire eRequisition'** section on the Summary page. The appropriate Terms of Payment can also be set for each line item.

21. Click **'OK'** to complete the line item edits.

II. Editing a Non-Catalog Item

1. When editing a non-catalog item, the following fields can be edited:

- Price
- Supplier Location
- Contract
- Commodity Code
- Tax Rate
- Bill To
- Ship To
- Need-by Date
- FOB Code

- Supplier
- Contract Type
- Blanket Purchase Order Indicator
- Bid Number
- Account Type
- Account Code
- Deliver To
- Shipping Method
- Terms of Payment

2. Supplier Location can be edited by clicking the **'Select'** link next to the **'Location'** field.

3. Users can select which type of Contract is associated with the non-catalog line item using the **'Contract Type'** drop-down menu.

Note: Contract Type, Contract ID, and Bid Number must all 'match.' Users who encounter an error message after selecting a value from the drop-down menu may need to select **'Search for more...'** to find the appropriate value. This ensures that the Contract Type, Contract ID, and Bid Number combination on the eRequisition match the most current information in NCAS.

4. When a Contract Type is selected, the **'Contract'** field appears. Depending on the Contract Type it will appear as a drop-down menu or a free-text field. The Contract Type has been set to **'Statewide'** in the example below.

5. Select the down arrow from the **'Contract'** drop-down menu. If the appropriate Contract ID is not displayed as a recent selection, choose **'Search for more...'** to view the full list of available contracts.

6. If **'Search for more...'** is selected, the **'Choose Value for Contract'** pop-up window will appear. This pop-up window allows users to search by contract name and select the appropriate contract.

7. To add a Contract to the line item, click **'Select'** next to the appropriate value.

III. Editing a Catalog Item

1. When editing a catalog item, the following fields can be edited:

- Supplier Location
- Account Type
- Account Code
- Ship To
- Need-by Date
- FOB Code

- Tax Rate
- Bill To
- Center
- Deliver To
- Shipping Method
- Terms of Payment

Note: Users with the Purchasing Agent role can edit the price on a catalog line item. Prices on catalog items can only be decreased. If the catalog data is incorrect, please also contact the NC E-Procurement Helpdesk at (888) 211-7440 Option 1, or email ephelpdesk@its.nc.gov, so that the issue can be researched.

2. **Additional Data** – When an eRequisition line item is a BForm (Business Form), the additional information for that line item (e.g., color, size) will display in the **'Additional Data'** field. The selection in this field can be edited by clicking on the linked value that appears.

IV. Editing a Punchout Catalog Item

1. When editing a punchout catalog item, the following fields can be edited:

- Supplier Location
- Tax Rate
- Bill To
- Ship To
- Need-by Date
- FOB Code

- Commodity Code
- Account Type
- Account Code
- Deliver To
- Shipping Method
- Terms of Payment

Note: Changes to the Quantity field must be made within the supplier's punchout catalog. Users can click the **'Edit'** link to punch back out to the supplier's catalog and make any changes.

V. Mass Edit Functionality

When creating an eRequisition with multiple line items, users can mass edit eRequisition line items to set the same values for multiple lines. Not all fields are available for mass editing. Users will find this feature helpful when setting account codes. Commodity codes can also be changed using the mass edit function as long as the items being edited are non-catalog items.

During Mass Edit, the sample line item is determined based on the following order of the line item type: Catalog, Punch-out, Non-Catalog. Users will only be able to edit the fields associated with the sample item according to the chart below.

Editable Fields by Sample Line Item Type			
Field	**Non-Catalog**	**Catalog**	**Punchout**
Supplier	X		
Supplier Location	X	X	X
Contract Type	X		
Contract	X		
Blanket Purchase Order Indicator	X		
Commodity Code	X		X
Quantity			
Price			
Tax Rate	X	X	X
Account Type	X	X	X
Bill To	X	X	X
Account Code	X	X	X
Ship To	X	X	X
Deliver To	X	X	X
Need-by Date	X	X	X
Shipping Method	X	X	X
FOB	X	X	X
Terms of Payment	X	X	X

1. To mass edit line items, place a check in the checkbox beside each line item to be edited and click the **'Edit'** button.

2. During Mass Edit, the sample line item is determined based on the following order of the line item type: Catalog, Punchout, Non-Catalog. Users will only be able to edit the fields associated with the sample item, as described in the chart at the beginning of this section. The screenshot on the next page shows the mass edit functionality when both a non-catalog item and a catalog item are selected for editing.

   Note: Some changes made during a mass edit do not apply to all line items. For instance, if the supplier location has been updated for two line items with different suppliers, the edit is only applied to the sample line item because the selected location is invalid for the other line item.

3. Edit the necessary fields.

4. Click **'Next'** to review the mass edit changes.

Note: The mass edit functionality uses line item 1 as a sample item for the mass edit only if all of the line items are of the same type. Users edit the necessary fields on the sample line item. When done editing, the changes made against the sample line item will be applied to qualifying line items.

5. Review the modified fields and click **'Done'** to complete the mass edit and apply the changes.