ePro and Pcards

Punchout orders are permitted to use Pcards as the payment method (unless their sticker indicates otherwise)
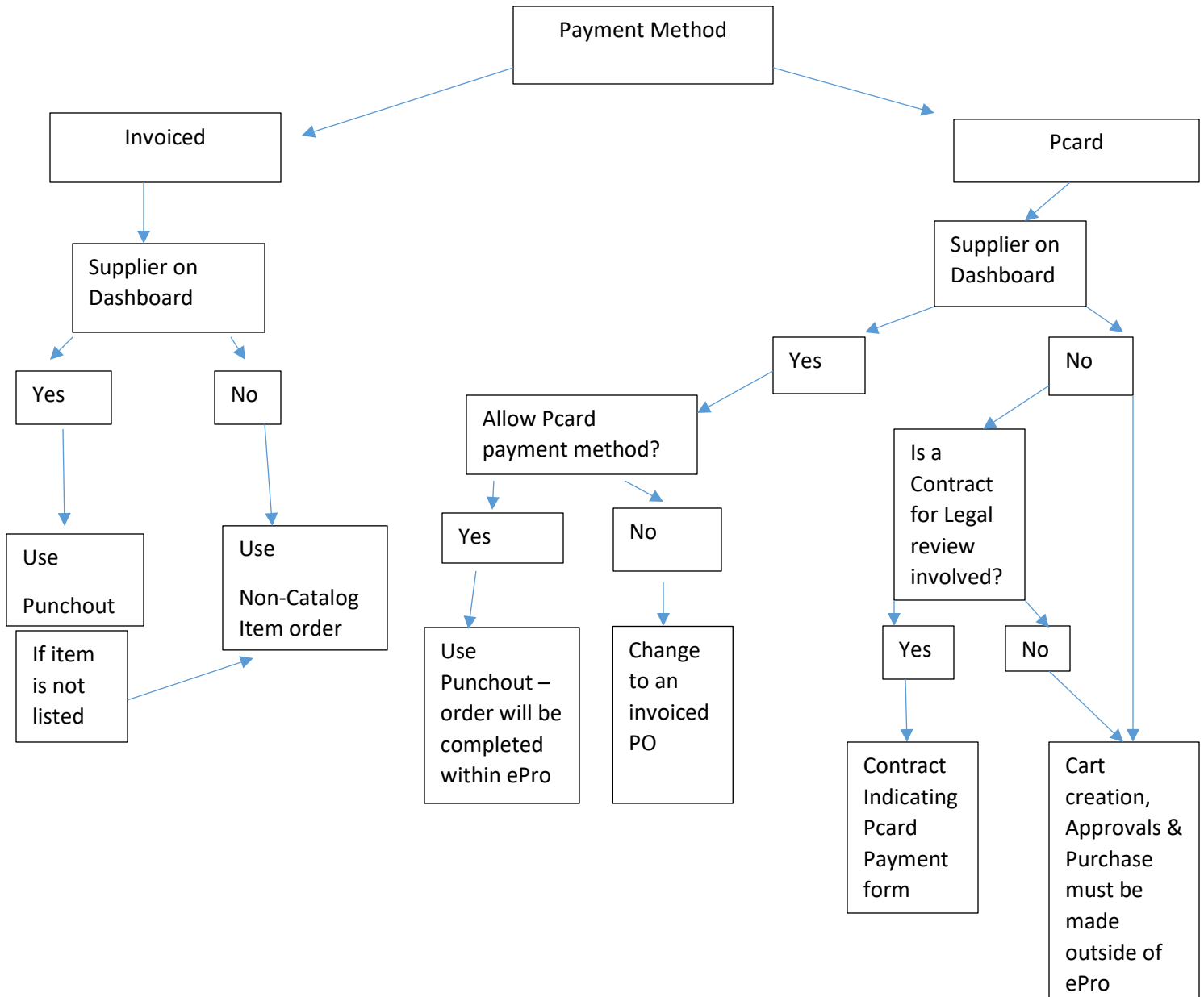
Non-Catalog Item orders do not have the capability for Pcard as a payment method since those purchase orders are delivered via email.

Sticker for "Contract indicating Pcard payment" allows a requisition with a contract to be reviewed by appropriate approvers, Procurement and Legal but does not result in a purchase order. This form was created for acquiring approvals only. Users complete purchases outside of ePro.

Verify departmental procedures regarding usage of ePro for approvals only which result in purchases that are made outside of ePro.

Using the information listed on the dashboard, ask yourself the following questions:

What is my Payment Method?

```
                              Payment Method

        Invoiced                                          Pcard

    Supplier on                                       Supplier on
    Dashboard                                         Dashboard

  Yes        No                              Yes                    No

 Use         Use              Allow Pcard                    Is a
 Punchout    Non-Catalog      payment method?                Contract
             Item order                                      for Legal
  If item                     Yes          No                review
  is not                                                     involved?
  listed
                              Use          Change       Yes        No
                              Punchout –   to an
                              order will be invoiced
                              completed    PO         Contract    Cart
                              within ePro            Indicating   creation,
                                                     Pcard        Approvals &
                                                     Payment      Purchase
                                                     form         must be
                                                                  made
                                                                  outside of
                                                                  ePro
```
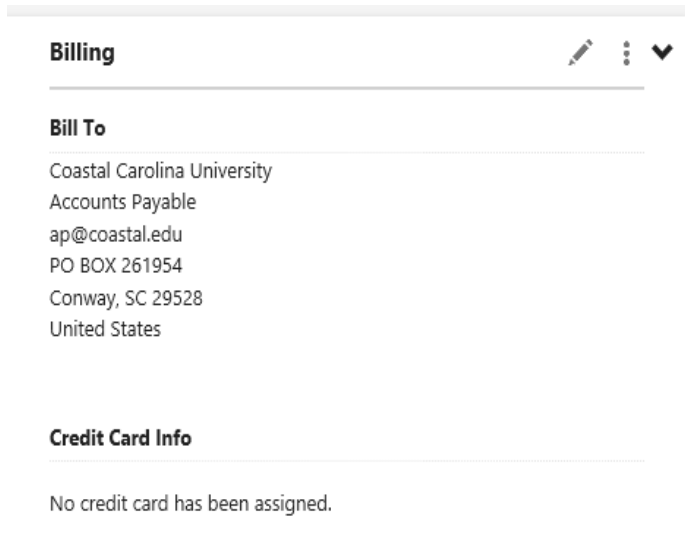
ePro for P-cards

Punchout Suppliers:

P-cards can <u>only</u> be used as payments within ePro for Suppliers who have a Punchout option on the dashboard.

The P-card information can be added in the Billing Section
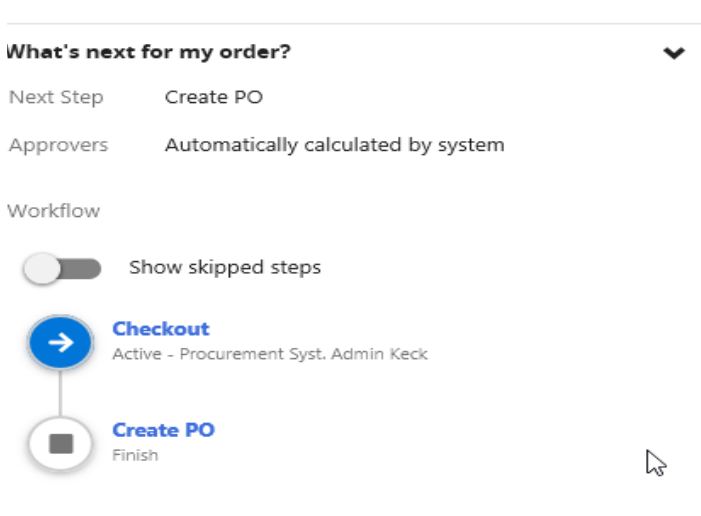
Billing

Bill To

Coastal Carolina University
Accounts Payable
ap@coastal.edu
PO BOX 261954
Conway, SC 29528
United States

Credit Card Info

No credit card has been assigned.

- If keyed in during the creation of the Cart then all workflow approvals are skipped (with the exception of ITS, if required).

What's next for my order?

| Next Step | Create PO |
| Approvers | Automatically calculated by system |

Workflow

Show skipped steps

Checkout
Active - Procurement Syst. Admin Keck

Create PO
Finish

- If approvals are required, please follow the **Pcard Approval** steps.

Pcard orders that should be placed outside of ePro

- Non-Vetted Supplier
- Contract is not associated requiring University Council to review
- Various university approvals are not required

- Departments requiring Budget Officer approval should utilize their internal form

  Each area / department is responsible for the creation and maintenance of their own
     Approval form.
  Procurement Services will no longer offer or maintain the Purchase Requisition form on the
     university's forms page.

Intended Pcard Purchase by Department

- It will be a required field and accessible in the Cart General Section.
- Flagged to occur on requests of $100 or less (pre-tax)
- Carts created via Punchout will be returned to the Requester after passing the various approvals workflow steps but prior to the Requisition Assignment (Procurement) step. Once returned, the Requester will add their Pcard information as usual.
- Carts created via Non-Catalog Item method will be rejected back to the Requester after passing all the various approval workflow steps but prior to the Requisition Assignment (Procurement) step. Once rejected, the Requester will contact the supplier outside of ePro@ccu to place the order and process the payment via Pcard, as usual.
- Requests for $100 or more will continue to flow to Procurement Services for review and will be Returned or Rejected appropriately.
- This will not impact the workflow on Carts created via Forms (Non-Dollar, Contract indicating Pcard Payment, Vehicle Purchase, Grants Only, or Sole Source).

P-card Approval

Departments that require additional approvals prior to purchases using the P-card

1. REQ Initiator must select "Intended Pcard Purchase by Department" in General section
2. Review who is included as an Approver in the Budget Officer or VP Approval steps
     i. What's next for my Order?
     ii. Locate workflow step
     iii. Expand to see approvers listed

     iv.

       v.   Inter-departmental rule determines how the lower level Budget Officer approvals are obtained (i.e. Cart Assigned and Comment added or Comment added to the requisition during BOA step.

      vi.   Please reference the "Comments and Attachment" handout for assistance.

3. Once Budget Officer approvals have been obtained, the requisition will move to the next workflow step

4. In the Buyer Approval 1 step, Procurement Buyer will review requisition

     i.   For Punchouts requests:

        1.   If approved, Procurement Buyer will select "Return to Requisitioner".

        2.   A Comment will be included indicating how to proceed.

        3.   This allows the Requester to then add the Pcard information and select "Place Order".

     ii.   For Non-Catalog Item requests:

        1.   If approved, Procurement Buyer will select "Reject Requisition".

        2.   A Comment will be included indicating how to proceed.

        3.   Initiator can then order items via the supplier's website - outside of the ePro system.

        4.   End User will add a COMMENT indicating the date & time the order was placed.

        5.   Additionally they will add a COMMENT once the product / service is received / completed. This will help various end users track the request through the cycle to completion.

Pcard Reconciliation Supporting Documentation

Attach all 3 documents when completing the Pcard reconciliation process.

Receipt:
a. Punchout to the Supplier
b. Locate the Account or Order History area
c. Print out the invoice (must be itemized)
d. Circle or highlight the PO number
Please note, suppliers determine which end users can access the Quote and Order History information. Contact the Procurement System Administrator for assistance.
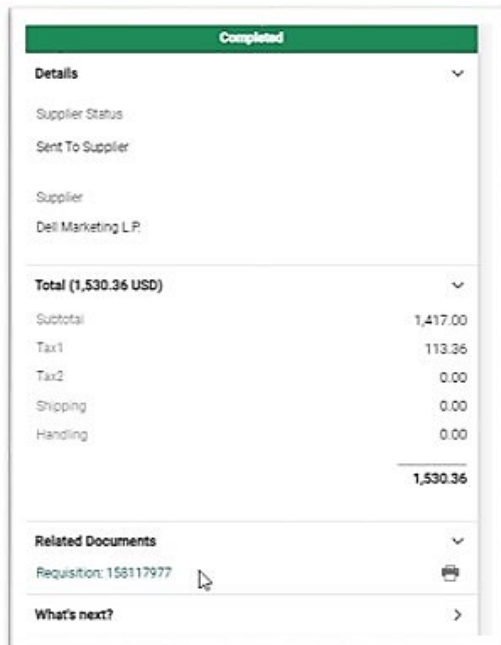
PO:
a. Search for PO# utilizing the Document Search handout
b. PO# C002464 – quick view version is obtained by clicking on the PRINT icon
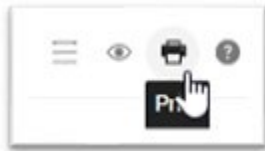
c. Print PO
d. Circle or highlight the PO#

HISTORY:
a. This is the audit trail listing all comments, field updates, system messages, processes as well Approver action steps.
b. ITS Approval will be indicated in here as well.
c. Search for REQ# utilizing the Document Search handout Or
d. Select the requisition number available on the PO under Related Documents

e. Open the History tab

Requisition · 158117977 ▾

Summary Taxes/S&H Comments **1** Attachments **1** History

f. Expand results from default of 20 per page to 200 per page

20 Per Page

10

20

30

40

50

100

150

200
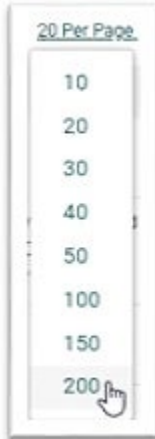
g. Print Results
h. Circle or highlight the ITS Approval action.

Amazon Punchout

Amazon requires information during the Punchout Cart creation that makes it appear as if the order is being completed on the Amazon side. It however is not.

Some of Amazon's required fields must match to information entered on the ePro Cart side and is verified during the cXML order distribution. The credit card information and associated card holder is one of those fields. Pcard holder **must** be the end user to punchout and create the cart.

The university has an Amazon Business account only. Free shipping is not always an option

Order confirmation and invoices are sent to the Requester only. Currently Amazon does not permit Account Order History information searches.

The Amazon punchout support team may be able to provide further assistance – For punchout order or technical issues, email corporate-punchout@amazon.com, call (888) 281-3847, or chat with a support team member.

On Dashboard locate the Punchout
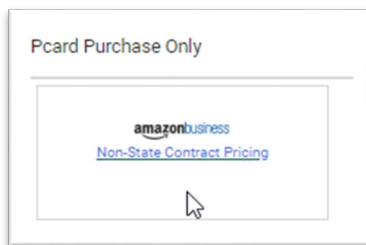
This is web based shopping and not a state contract supplier. As indicated on our State Contracts page "When such a contract exists for a needed good or service, and as a state agency, Coastal Carolina University is required to purchase the good or service through the contract and from the awarded vendor."

     Search for item(s)

     Click "Add to Cart"

     When ready – "Proceed to checkout"
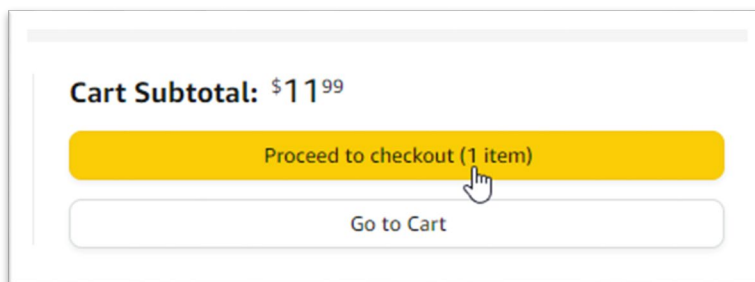
     During initial Punchout to Amazon you may need to enter Shipping information
         If so, list Shipping to: Atlantic Hall Purchasing & Receiving,
             ATTN:, (your name goes here)
             642 CENTURY CIR, CONWAY, SC, 29526-8279

Choose a Delivery option that best suits your time frame and budget
Select "Continue"

During initial Punchout to Amazon you will need to enter your Pcard information
 This information will be checked against the information listed on the ePro Requisition.
 If they do not match either an error will occur (cancelling the item) or the card listed on
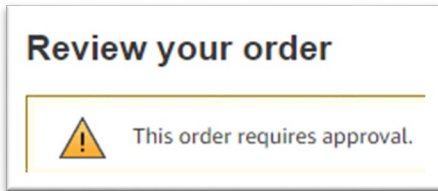 the Amazon side will be charged.
 Do not select to pay by invoice
Once Pcard information is entered or verified, select "Continue"

You are not completing the order at this time.
Key features on the screenshot below will indicate that this is a Punchout ePro@ccu order that
will pull back into the application.

These three fields provide a visual clue that the order is being pulled back into ePro for additional
steps.

Review your order

⚠ This order requires approval.

and

Submit order for approval
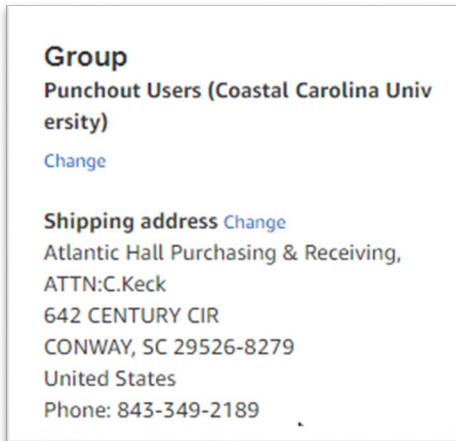
By placing your order, [Submit order for approval]
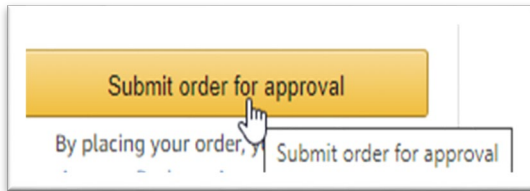
and

Estimated Delivery: Depends on Approval

Verify that you are in the Punchout Users Group and that the Shipping information is a CCU address

Group
Punchout Users (Coastal Carolina University)
Change

Shipping address Change
Atlantic Hall Purchasing & Receiving,
ATTN:C.Keck
642 CENTURY CIR
CONWAY, SC 29526-8279
United States
Phone: 843-349-2189

Verify that the Payment method is that of the Pcard holder

Payment method
VISA ending in 28

Billing address is always:
Coastal Carolina University
PO Box 261954
Conway, SC 29528

Once you select "Submit Order for Approval", the Punchout cart will pull back into ePro@ccu.

Select "Proceed To Checkout"

Complete the required fields as instructed on the Shopper & Requester handout in conjunction with your area / department specific processes.

Order confirmation and invoices are sent to the Requester only. Currently Amazon does not permit Account Order History information searches.

The Amazon punchout support team may be able to provide further assistance – For punchout order or technical issues, email corporate-punchout@amazon.com, call (888) 281-3847, or chat with a support team member.

Herald Office Punchout

Only Pcard Holders can create a Cart, similar to Amazon

Account is associated with end user's email address

Pcard set up in the "My Account" area

Navigate to "CREDIT CARDS" – click on pencil icon

Reminder message on the Punchout side to add Pcard information
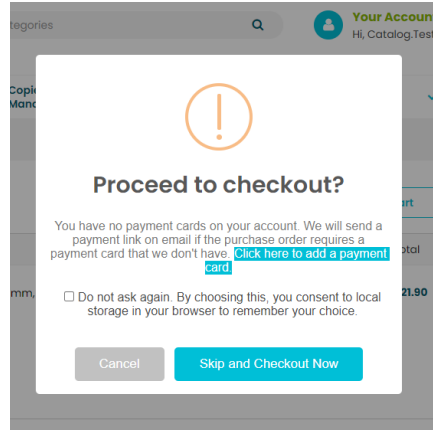
If the Pcard information on Herald side does not match what was provided on Jaggaer's ePro side, orders will either be cancelled, turned into an invoiced purchase order, or Herald will send an email to the associated end users with a link to enter the Pcard information (see below)

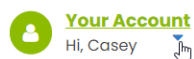Always add the "Display Contract Item Only" filter when performing a product search

Herald Office provides "desktop" delivery on Monday, Wednesday and Friday

Reference *Obtaining Punchout Receipt* handout – page 4-5

> Login to ePro
> Punchout to Herald
> Click on the dropdown menu under the "Your Account" area

> To view Order status, select "Orders"
> Enter criteria filters to locate the order in question
> Select the desired "Order #"
> The "Print Order" and "Tracking Details" options are on the top left corner of the page

Select the intended action
All orders are delivered with an invoice/receipt.

If additional copies are needed please contact their AR department at ar@heraldoffice.com
Orders are associated with the User Login only