

# BuyCarolina

Purchasing made smarter.

## Tips & Time Saving Strategies



When the project is out of funds, you may receive a system error “budget out of bounds” which will not allow submission of the order. Consult with PI on alternative options.

For quicker chartfield entry, use the default chartfield

Approvals should be received within 2 business days (for urgent or delayed approvals contact your research fund administrator)

Set up the default chartfield and shipping address in Connect- Carolina, click compass (far top right) to begin

For denied orders: Click on link in email to open order, click on gray triangle to update chartfield, budget check & resubmit

Finance Menu > Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Requester Setup

The screenshot shows the 'Requester Setup' form. A red arrow points to the 'Requester' dropdown menu where 'ONYEN' is entered. Another red arrow points to the 'Search' button. The form includes fields for 'Requester' and 'Description', both with 'begins with' dropdowns, and a 'Case Sensitive' checkbox. Buttons for 'Find an Existing Value', 'Add a New Value', 'Search', and 'Clear' are visible, along with links for 'Basic Search' and 'Save Search Criteria'.

Most Used Account Code: 537210 Research Supplies

The screenshot shows two buttons: 'Check Budget' and 'Pre-Check Budget'. A red box highlights the 'Pre-Check Budget' button, and a yellow arrow points to it from the left. Below these buttons are 'Save & submit' and 'Save for Later' buttons, also highlighted with a red box.

Pre-check budget before clicking “save and submit”

You can shop from multiple vendors at once! Just search in the top bar.

Submit for approval: For commonly used household items, the comments section should include how the item furthers the research aims/project Not required for gas, chemicals, glassware

### CONSOLIDATE!!

It is faster and easier for everyone if labs combine small, individual orders from different lab members into one large order. Particularly if purchasing from the same vendor.

### Contacts for Further Help

### Department Use

(approval/procedure/chartfield)

- Access: Request via RASR, option: BuyCarolina Access Request
- Order Status: Vendor Search: [finance.unc.edu/services/buycarolina/](http://finance.unc.edu/services/buycarolina/)
- Technical/Navigation: Business Systems Help Desk [help.unc.edu](http://help.unc.edu) ConnectCarolina>CC Finance Applications or 919-962-HELP
- Others: [chemadmin@unc.edu](mailto:chemadmin@unc.edu)

- Kathy Allen, [ktallen@unc.edu](mailto:ktallen@unc.edu), 919-962-4285
- John Gorman, [jgorman@email.unc.edu](mailto:jgorman@email.unc.edu), 919-966-1566
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