

4 Purchasing Methods

E-Procurement
(ePro)

For UNC contracted
vendors

Purchasing Card
(p-card)

For quick payments of
small orders

Vouchers

For small orders not
allowed on p-card

Purchase Orders
(POs)

For large orders
Over \$5,000

PCard: Basics

- For access
 - ConnectCarolina and Related Applications Access Request Form
 - P-Card Account Maintenance Form
 - Email forms to laura_yurco@unc.edu
- What can you purchase? <https://unc.policystat.com/policy/6121678/latest/>
 - Allowed: Research supplies, conference registration, business meals
 - Not allowed: Other travel expenses, alcohol, purchases >\$5000, research gases
- Important dates
 - Sign off by the 15th of each month
 - Check back daily- 15th-20th
- Fraudulent charges?
 - PI must call the number on the back of the credit card
 - You must still sign off on the charges in Bank of America Works
- Contact
 - Technical/Navigation: Business Systems Help Desk (help.unc.edu) or 919-962-HELP
 - Department Use (procedure/chartfield)
 - Research Fund Administrator: Kathy Allen, 919- 962-4285 ktarris@email.unc.edu and D'Angelo Best, 919-527-3367 ddbtest@email.unc.edu
 - Karen Holmes, klholmes@email.unc.edu, 919-962-1189
 - Others: Laura Yurco, laura_yurco@unc.edu, 919-962-2173 and Hua Shen (University PCard Administrator), 919-962-2255 hua_shen@unc.edu

Access transactions

Form for credit limit increase
https://intranet.chem.unc.edu/wp-content/uploads/sites/6/2020/02/Purchasing_Card_Account_Maintenance_Form.07.03.19.pdf



Home Expenses Reports
 ↳ Transactions

Action Items					Upload Receipts
Action	Acting As	Count	Type	Current Status	
Resolve	Accountholder	252	Transaction	Flagged	
Sign Off	Accountholder	220	Transaction	Pending	

2 items Show per page Page: of 1

Accounts Dashboard					
In Scope					
Account Name	Account ID	Credit Limit	Current Balance	Available Spend	Available Credit
ABIGAIL KNIGHT	5954	25,000.00	1,090.45	23,952.12	23,909.55
ALEX ZHUKHOVITSKIY	4356	10,000.00	4,038.79	10,000.00	5,961.21
ALEXANDER J MILLER	9626	10,000.00	1,822.45	8,177.55	8,177.55
ANDREW MORAN	0847	5,000.00	127.47	4,928.85	4,872.53
BO LI	4924	5,000.00	327.56	5,000.00	4,672.44
BRANDIE M EHRMANN	8294	25,000.00	762.02	24,866.33	24,237.98
CHUN HSING CHEN	6848	5,000.00	0.00	5,000.00	5,000.00
COLLIN MCKINNEY	6050	25,000.00	1,127.51	24,242.89	23,872.49
CYNTHIA K SCHAUER	7028	5,000.00	0.00	5,000.00	5,000.00
DAVID NICEWICZ	2511	5,000.00	1,996.75	3,003.25	3,003.25

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Sort for your transactions

Transactions - Accountholder

<< Pending Sign Off Signed Off Flagged All Clear Filters Columns

Advanced Filter

- Date - 11/29/2019 - 03/08/2020
- Account - All
- Purchase Request - All
- Amount Range - All
- Dispute Status - All
- Account Status - All
- Allocation Complete - All
- Allocation Valid - All
- Allocation Authorized - All

Search Reset

Document	Account ID	Sign Off	Flagged	Comments	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Uploaded Receipt	Comp Val Auth	Allocation	Amount Allocated
<input type="checkbox"/> TXN01160885	1397	none			02/17/2020	02/14/2020	Alexanian, Erik	80.00	IN COMBI-BLOCKS, INC.	No	✓ ✓ ✓	UNCCH-29201-C0225537210318300C3005	80.00
<input type="checkbox"/> TXN01162384	1397	none			02/19/2020	02/17/2020	Alexanian, Erik	52.99	PHD POSTERS LLC	No	✓ ✓ ✓	UNCCH-29201-C0225558930318300C3005	52.99
<input type="checkbox"/> TXN01166140	1397	none			02/26/2020	02/25/2020	Alexanian, Erik	480.00	IN COMBI-BLOCKS, INC.	No	✓ ✓ ✓	UNCCH-29201-C0225537210318300C3005	480.00
<input type="checkbox"/> TXN01166688	1397	none			02/27/2020	02/26/2020	Alexanian, Erik	18.09	SWAGELOK NORTH CAROLINA/E	No	✓ ✓ ✓	UNCCH-29201-C0225531220318300C3005	18.09
<input type="checkbox"/> TXN01167108	1397	none			02/27/2020	02/26/2020	Alexanian, Erik	545.00	IN INERT CORPORATION	No	✓ ✓ ✓	UNCCH-29201-C0225531220318300C3005	545.00
<input type="checkbox"/> TXN01168811	1397	none			03/02/2020	02/27/2020	Alexanian, Erik	79.00	UNCSTUDENTBOOKSTORE	No	✓ ✓ ✓	UNCCH-29201-C0225531110318300C3005	79.00
<input type="checkbox"/> TXN01170092	1397	none			03/04/2020	03/03/2020	Alexanian, Erik	62.25	TCI AMERICA	No	✓ ✓ ✓	UNCCH-29201-C0225537210318300C3005	62.25
<input type="checkbox"/> TXN01170882	8840	none			03/05/2020	03/04/2020	Allbritton, Nancy	-750.00	GORDON RESEARCH	No	✓ ✓ ✓	UNCCH-26201-70084522928318300C3007CCHRESPROF	-750.00
<input type="checkbox"/> TXN01166923	5210	none			02/27/2020	02/26/2020	Atkin, Joanna M	514.46	Amazon.com HD0PH3ZP3	No	✓ ✓ ✓	UNCCH-27101-14101531110318300C3727CCHSUATKIN	514.46
<input type="checkbox"/> TXN01162186	5210	none			02/18/2020	02/17/2020	Atkin, Joanna M	136.59	THE UPS STORE 3651	No	✓ ✓ ✓	UNCCH-27101-14101522928318300C3727CCHSUATKIN	136.59

0 Selected | 212 items Show 10 per page Page: 1 of 22

Refry Automatch Mass Allocate Attach Print Sign Off Upload Receipt



Enter credit card holder's last name

Document	Account ID	Sign Off	Flagged	Comments	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Uploaded Receipt	Comp Val Auth	Allocation	Amount Allocated
<input checked="" type="checkbox"/> TXN01171612	4066	none			03/06/2020	03/05/2020	Hicks, Leslie	118.56	QUARTZY.COM	No	✓ ✓ ✓	UNCCH-27101-14101545230318300C3697CCHSUHICKS	118.56

Change chart field strings

Document	Account ID	Sign Off	Flagged	Comments	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Uploaded Receipt	Comp Val Auth	Allocation	Amount Allocated
TXN01171612	4066	none			03/06/2020	03/05/2020	Hicks, Leslie	118.56	QUARTZY.COM	No	✓ ✓ ✓	UNCCH-27101-14101545230318300C3697CCHSUHICKS	118.5

- Allocate / Edit
- Sign Off
- View Full Details
- Dispute
- Retry Automatch
- Attach to Purchase Request
- Manage Receipts
- Print

Allocation Details - TXN01171612 - QUARTZY.COM 03/06/2020 | Source Amount : 118.56 USD

Allocation Purchase Amount: 118.56 Tax Amount: 0.00 Allocation Total: 118.56 | 100% Variance: 0.00

Comp Val Auth	All Values	Sales Tax	Description	GL01: Business Unit	GL02: Fund	GL03: Source	GL04: Account	GL05: Dept	GL06: Project Id
✓ ✓ ✓	Amount 118.56	0.00	Cuvettes	UNCCH	27101	14101	545230	318300	

0 Selected | 1 Item

Remove Add Duplicate Clear GL

Reference & Tax

Reference	Tax Status	Goods & Services	Tax Total	Use Tax	Shipping ZIP
	Sales Tax Included	118.56	0.00	0.00	27599

Adjust Amount

Transaction Detail - 5047 (LAB/MEDICAL/DENTAL/OPHTHALMIC HOSPITAL E)

Purchase Summary

Description	Unit Amount	Quantity	Total Amount	Commodity Code	Destination Country Code	Destination Postal Code	Discount Amount	Duty Amount	Order Date	Origin Country Code	Origin Postal Code	Purchase ID	Shipping Amount	Tax Amount	Unique Invoice Number
Line Item Summary - Charges for 03/05/20	0.00	1	118.56		USA		0.00	0.00	03/05/2020				0.00	0.00	0000000000000000

Canadian Tax

Sales Tax / PST / QST GST / HST

Save Close



Document	Account ID	Sign Off	Flagged	Comments	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Uploaded Receipt	Comp Val Auth	Allocation	Amount Allocated
TXN01171612	4066	none			03/06/2020	03/05/2020	Hicks, Leslie	118.56	QUARTZY.COM	No	✓ ✓ ✓	UNCCH-25201-490005372103183005103040	118.56

Upload invoice

	Document	Account ID	Sign Off	Flagged	Comments	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Uploaded Receipt	Comp/Val/Auth	Allocation	Amount Allocated
<input type="checkbox"/>								hicks			All			
<input checked="" type="checkbox"/>	TXN01171612	4066	none			03/06/2020	03/05/2020	Hicks, Leslie	118.56	QUARTZY.COM	No	✓ ✓ ✓	UNCCH-27101-14101545230318300C3697CCHSUHICKS	118.56



103407400499 - Receipts

Upload Date	Uploaded By	Receipt Date	File Name	File Size	Description	Document ID
No data available in table						

0 Selected | 0 items

Show 10 per page

Page: 1 of 0

Add Remove View PDF

- New Receipt
- Stored Receipt

Close

Invoices should include:

- Vendor
- Date
- Amount
- detailed info about what was purchased

Missing invoice on the 15th?

- Still modify chart field strings and upload a temporary note saying that you are working with the vendor to get the invoice

Sign off

Document	Account ID	Sign Off	Flagged	Comments	Date Posted	Date Purchased	Primary Accountholder	Purchase Amount	Vendor	Uploaded Receipt	Comp Val Auth	Allocation	Amount Allocated
TXN01171612	4066	none			03/06/2020	03/05/2020	Hicks, Leslie	118.56	QUARTZY.COM	No	✓ ✓ ✓	UNCCH-27101-14101545230316300C3697CCHSUHICKS	118.5

- Allocate / Edit
- Sign Off**
- View Full Details
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- Print

Confirm Sign Off

Sign off 1 transaction(s).

Comments:

OK Cancel

Justification should:

- Describe how purchase impacts research
- Good: Trypsin for proteomics sample prep
- Bad: Needed for dissertation research

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