

NC eProcurement

Receiving a Line Item

Receiving is the process an agency uses to record goods and services that are delivered. In the NC eProcurement process, receiving completes the purchase order lifecycle. A receipt is an acknowledgement that the goods have arrived and/or the service is complete. Receipt records ensure that all items on the purchase order were correctly received and accounted for in the financial system. Once items have been received in the system, the supplier can be paid for their goods or services. Every purchase order line item should be received in Ariba. Items that are Unit of Measure '**Dollar**', however, do not transmit between NC eProcurement and NCAS. Purchase order failures must be resolved before receiving can occur.

Depending on the agency, receiving occurs at either a centralized location, known as Central Receiving, or at the desktop of the requester, known as Desktop Receiving. Ariba allows for both methods of receipt. The ship-to address on the purchase order will determine the shipment's destination and is also associated with either a central receiving facility or a desktop receiving facility. Each NC agency has determined which type of receiving best meets its needs.

- **Desktop Receiving:** The user listed as '**On Behalf Of**' on the Purchase Requisition receives the items at their desk. They will open the package, check the product, and then go into NC eProcurement to accept or reject the items in the order.
- **Central Receiving:** Purchase orders are delivered to a centralized location. One user with the central receiving group associated with that Ship To address then logs into NC eProcurement to accept or reject the items in the order.

Receipt Email Notifications: An automated email message is sent to the receiver reminding the user to receive a specific order when the purchase order is generated. However, it is critical that the receiver waits until the products have arrived and check the quality and quantity before receiving the order in Ariba.

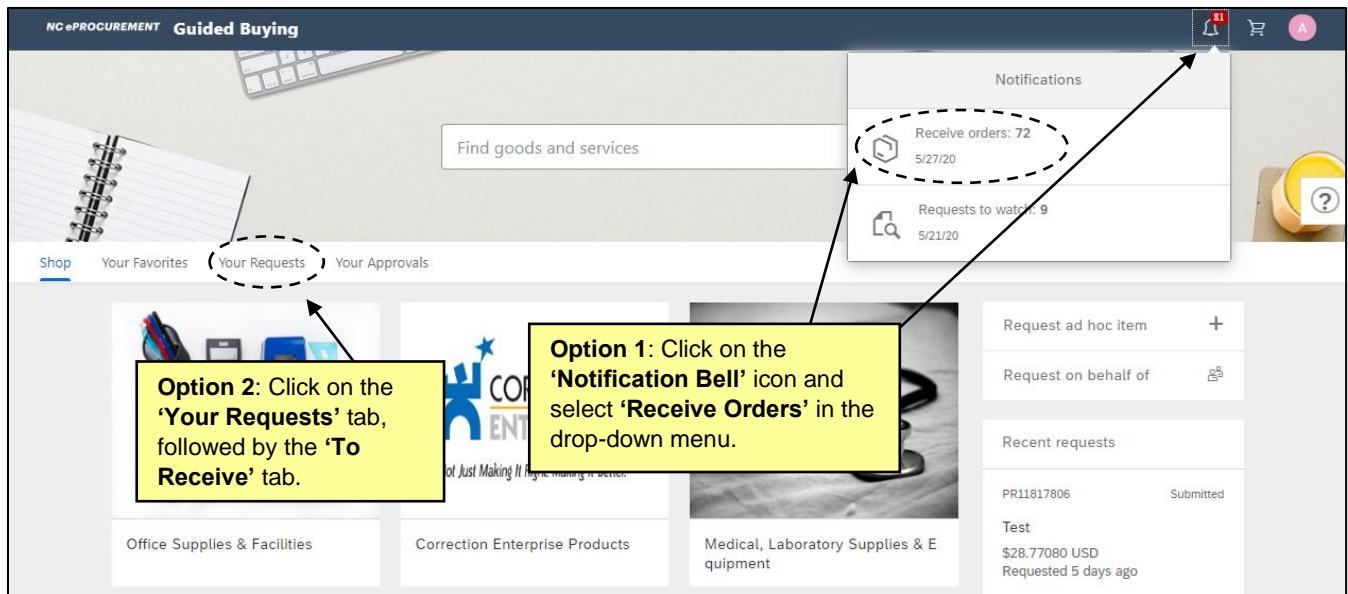
I. Access Receiving through Guided Buying

1. Receiving can be completed through both the Guided Buying View and Expert View of NC eProcurement.
2. From the Guided Buying Landing Page there are two ways to access Receiving.
 - a. Locate the '**Notification Bell**' icon on the top right of the screen, and click on any orders that require receipt (if applicable).
 - b. On the left side of the screen, click on the '**Your Requests**' tab. In the subsequent screen, select the '**To Receive**' tab at the top of the screen.

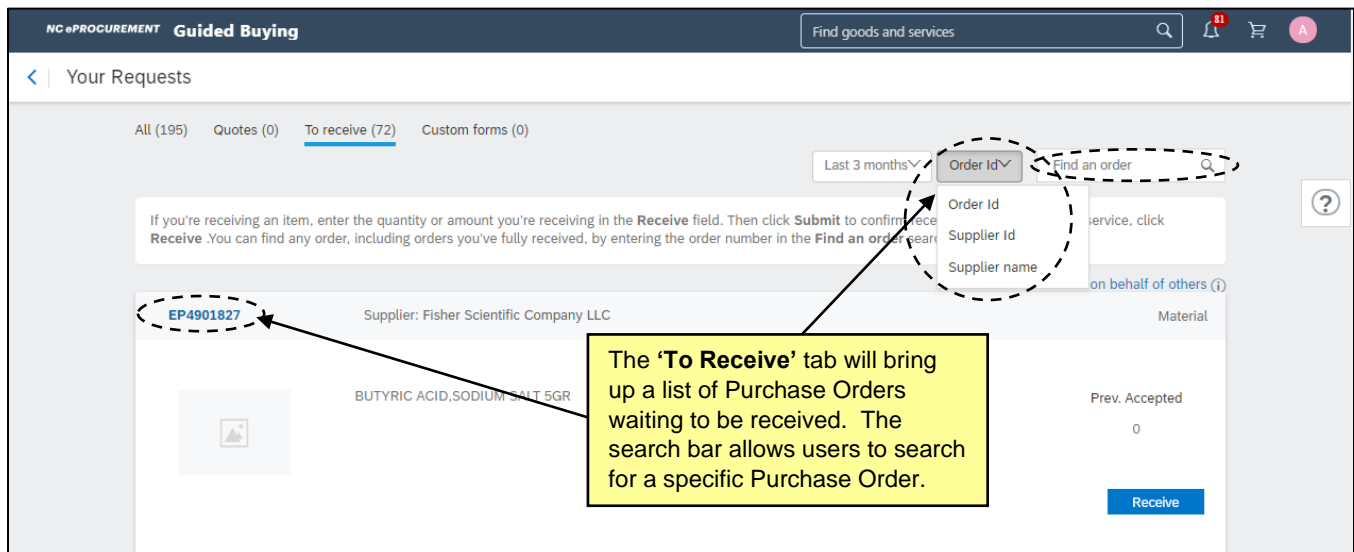
NC eProcurement

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STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY



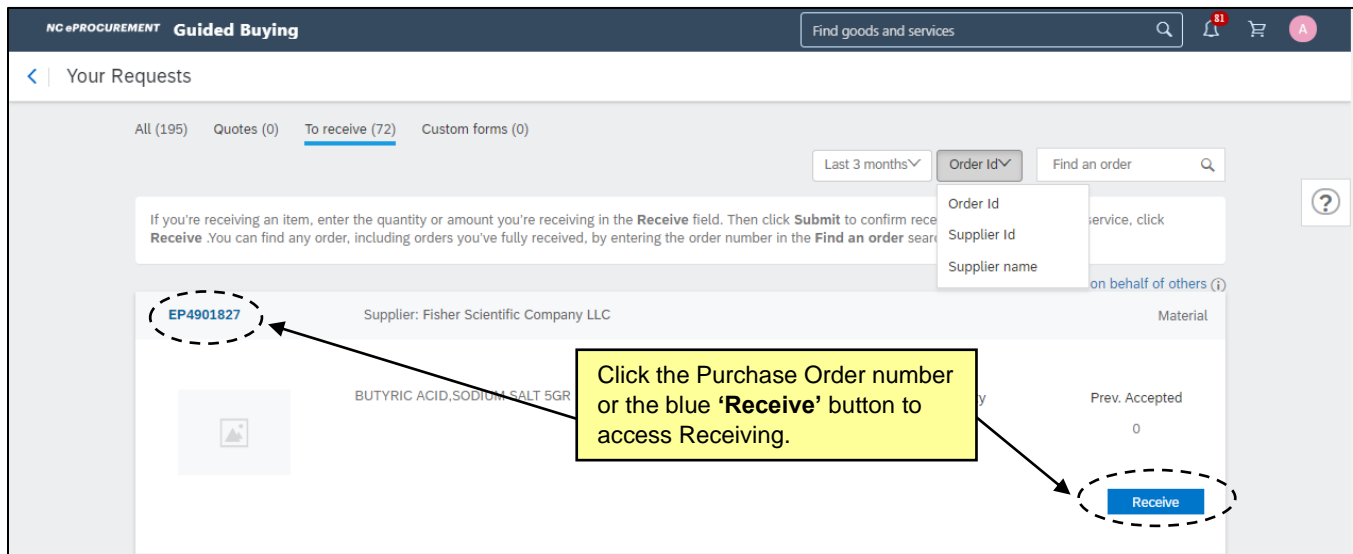
3. In the 'To Receive' tab, find the purchase order waiting to be received by looking through the list, or searching by Order ID, Supplier ID, or Supplier Name in the search bar in the top right of the screen.



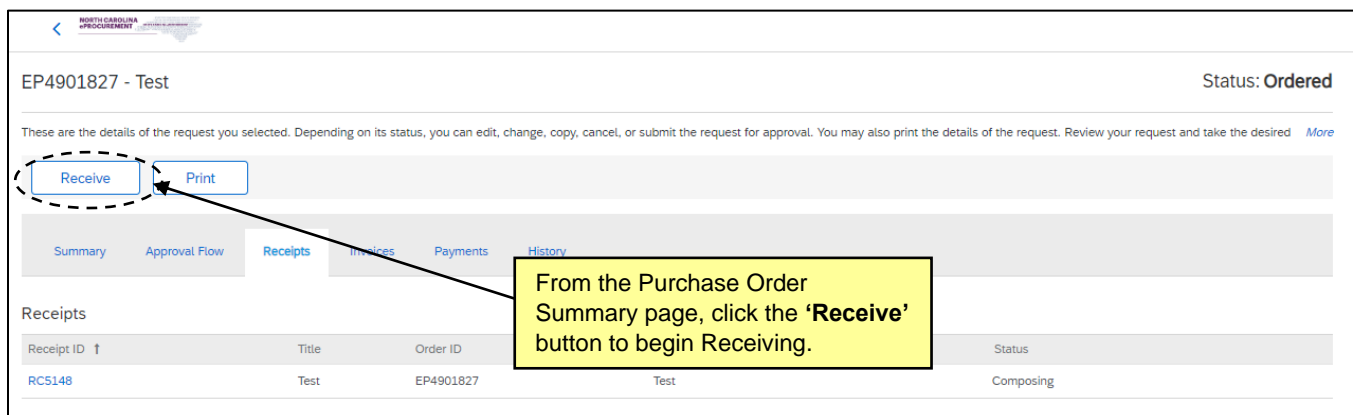
4. Once the correct Purchase Order is located, select the Purchase Order link, or click the blue 'Receive' button.

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- The Purchase Order summary page will display, with an option to 'Receive' on the top left of the screen. (Skip to **Section III. Receiving a Line Item** to begin receiving).



II. Access Receiving through Expert View

- To access Receiving through Expert View, there are multiple options:
 - Select 'Receive' in the 'Common Actions' portlet on the left side of the screen within either the **Home** or **Procurement** tabs.
 - In the upper right corner of the screen, click the 'Manage' drop-down and select the 'Receive' button.
 - Locate the Purchase Order in the 'My Documents' portlet.
 - Locate the Purchase Order in the 'To Do' portlet.

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Option 1: Select 'Receive' from Common Actions.

Option 2: Select 'Receive' from Manage drop-down.

Option 3: Locate the Purchase Order in the 'To Do' portlet.

Option 4: Locate the Purchase Order in the 'My Documents' portlet.

ID	Date	From	Status	Title	Required Action
PR11817310-V2	5/20/2020	ADMIN Requester	Ordered	Test123	Watch
PR11817296	5/19/2020	ADMIN Requester	Ordered	Copy of Openbook Test	Watch
PR11810671	2/26/2020	ADMIN Requester	Ordered	Copy of 2.2_ARRA_1	Watch
PR11813900-V2	1/8/2020	ADMIN Requester	Ordered	Copy of DoA Rewards and Recognition Awards	Watch
PR11813054	3/24/2020	ADMIN Requester	Ordering	Beacon with Bacon	Watch
PR11813055	3/24/2020	ADMIN Requester	Received	1A Smart Start, LLC	Watch

ID	Title	Date	Status
PR11818005	Test Requisition	5/29/2020	Submitted
PR11817993	Test	5/29/2020	Submitted
PR11817804	Test	5/27/2020	Submitted
EP4901828	Test	5/27/2020	Ordered
EP4901827	Test	5/27/2020	Ordered

- From the 'Receiving Steps' page, locate the Purchase Order to be received by choosing from the list that appears, or searching via the search bar at the top of the screen by Order ID, Requisition ID, Receipt ID, or Contract ID.

Receiving Steps

Search for and then select requests for which to receive or verify items. To search, select a request type and then enter an ID to find a specific request, or leave the field blank to find all. [More](#)

Order ID ☒ Needs receiving ☐ All

Search Results

Requests returned: 28

Order ID	Title	Date Created	Status	Supplier
EP4901179	TestReceipt	Fri, 8 May, 2020	Ordered	1157 designconcepts
EP4901210	TestReceipt	Mon, 11 May, 2020	Ordered	1157 designconcepts
EP4901317	TestingPO	Tue, 12 May, 2020	Receiving	Jarvis Property Restoration
EP4901337	Test Receiving	Tue, 12 May, 2020	Receiving	Jarvis Property Restoration
EP4901463	ReceivingTest10	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901464	ReceivingTest8	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901465	ReceivingTest7	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901466	ReceivingTest6	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901467	ReceivingTest5	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901468	ReceivingTest4	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901469	ReceivingTest3	Mon, 18 May, 2020	Ordered	Jarvis Property Restoration
EP4901470	ReceivingTest2	Mon, 18 May, 2020	Receiving	Jarvis Property Restoration

Locate the Purchase Order to be received through the list, or by finding it via the search bar.

III. Accepting Line Items

1. After selecting a purchase order to receive, the system will navigate through multiple Receiving Steps.
2. First, enter the number of items received in the **'Accepted'** column. Be sure to enter the items received based on the appropriate unit of measure. For example, if the purchase order was issued for "10 each," the receiver will receive based on that unit of measure (each). If the purchase order was issued for "12,500 dollars," the receiver will receive based on that unit of measure (dollars). The unit of measure is displayed in a column next to the Full Description of the line item.

Note: Not all shipments will be received in full. Users may enter a partial receipt by entering the number of items received in the **'Accepted'** column. More than one receipt can be entered for the same purchase order.

Note: If all items have been physically received or the service order has been completed, users may use the **'Accept All'** button to automatically enter the full amount ordered for each line item in the **'Accepted'** column.

Note: In some cases, users may physically receive more than what was ordered. In this case, the user may enter the amount ordered plus the receiving tolerance.

3. Next, enter the packing slip number in the **'Packing Slip'** field.

Note: Packing slip information is required for any unit of measure other than **'Dollar.'**

4. Click the **'Submit'** button.

Note: If the purchase order will not require any future receiving, select the radio button for **'Yes'** under the **'Close Order'** option.

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Receiving Steps Receipt RC4627: EP4901469 - ReceivingTest3

Prev Next Submit Exit

For a receipt, indicate the amount or quantity to accept or reject for each line item, and the date received. If you reject receipt line items, you must provide comments to explain your action.

This receipt, when submitted, will close the order for receiving as the Close Order option is set to Yes.

Order ID: EP4901469
Order Title: ReceivingTest3
Buying Entity: 13EG
FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files an invoice with the receipt.
My Labels: Apply Label... ⓘ

Date: Mon, 1 Jun, 2020
Processing Status: Receiving

Line Items - Receive by Quantity

No.	Quantity	Full Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received	Packing Slip
1	10	TestReceipt	each		0	0	10	0	10	Mon, 1 Jun, 2020	

Update Totals

Close Order: ☒ Yes ☐ No ⓘ

Comments - Entire Receipt

Comments:

Attachments - Entire Receipt

Add Attachment

Prev Next Submit Exit

Annotations:

- Enter number of items received in the 'Accepted' column.
- Enter the packing slip number.
- Set the radio button to 'Yes' to close the purchase order from future receiving.
- Select the 'Submit' button when all information is correctly entered.

- After the receipt has been submitted, it will be in **'Approved'** status, and the order will show a status of **'Received'**.

Notes:

- If an order is fully received, the order status will be **'Received'** and the order will be closed, even if the **'Close Order'** button was set to **'No.'**
- If the receiver submits a partial receipt or sets the **'Close Order'** button to **'No'** then the status of the order will show **'Receiving'** instead of **'Received.'**
- Users will receive an email after a receipt is transmitted to NCAS. If the receipt does not pass validation in NCAS, users may receive two emails. The first email is sent to let the user know the receipt has successfully transmitted to NCAS. The second means that the receipt failed to pass NCAS validation.
- Once a receipt is submitted, the subsequent Receipt ID is automatically created. This new Receipt ID will be in **'Processing'** status until NCAS sends a response to Ariba, which will switch the Receipt to **'Processed'** status.

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Receiving a Line Item

RC4627 - ReceivingTest3

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

[Print](#)

Summary Approval Flow History

Order ID: EP4901469
Order Title: ReceivingTest3
Buying Entity: 13EG
FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.
My Labels: Archive Items [Apply Label...](#)

Line Items - Received by Quantity

No.	Quantity	Full Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received	Packing Slip
1	10	TestReceipt	each		0	0	10	0	10	Mon, 1 Jun, 2020	1234

Close Order: Yes

IV. Rejecting Line Items

1. If a receiver received damaged or incorrect products on an order, they may opt to reject those items using the 'Reject Items' functionality. The rejection field is **not** stored in NCAS and is strictly for internal tracking purposes only. This field may be referenced by users at a later date to determine why the full amount of the purchase order was not received. When rejecting a shipment, users can enter comments as to why the line item is being rejected to serve as a reference in the future.

2. To reject an item, enter the amount to reject into the '**Rejected**' column in the Receiving Steps screen. Again, this information is **not** stored in NCAS.

Note: Do **not** enter a packing slip number when rejecting a line item.

3. Click the '**Next**' button.
4. In the '**Rejection Reason**' field that appears, enter a comment as to why the items are being rejected (e.g. Items were broken).

Notes:

- The '**Return By**' field does not connect to NCAS, so it is not necessary to fill out.
- The receiver can opt to have an automated email sent to Purchasing Administrator group by selecting the '**Email**' checkbox.
- The '**Goods Return Tracking Number**' also does not connect to NCAS and does not need to be filled out.

5. Click the '**Submit**' button.

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Receiving a Line Item

Receiving Steps Receipt RC4625: EP4901468 - ReceivingTest4

Prev Submit Exit

Review the receipt, make changes as necessary, and then submit it for approval.

Summary Approval Flow

Order ID: EP4901468 Date: Mon, 1 Jun, 2020

Order Title: ReceivingTest4

Buying Entity: 13EG

The 'Return By' field does not connect to NCAS and is not necessary to fill out.

Enter rejected amount in the 'Rejected' column.

No.	Quantity	Full Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received	Packing Slip
1	10	TestReceipt	each		0	0	0	3	3	Mon, 1 Jun, 2020	

Return By: ☐ Replacement ☐ Credit

Email: ☐ Send email to Purchasing

Rejection Reason:

Update Totals

Close Order: ☐ Yes ☒ No

Goods Return Tracking Number:

The 'Goods Return Tracking Number' field does not connect to NCAS and is not necessary to fill out.

Comments - Entire Receipt

Attachments - Entire Receipt

Add Attachment

Click 'Submit' to send the rejected receipt.

Prev Submit Exit

V. Reopening a Closed Order

- Once an order has been fully received or the 'Close Order' option has been set to 'Yes' in Ariba, the status of the purchase order will be 'Received.' This indicates that the order has been completed and is closed in NC eProcurement. Users may reopen a closed order by following these steps.
- To begin reopening an order, select the 'Receive' command from Expert View on either the Home Tab or the Procurement Tab.

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Receiving a Line Item

Option 1: Select 'Receive' from Common Actions.

Option 2: Select 'Receive' from Manage drop-down.

ID	Date	From	Status	Title	Required Action
PR11817310-V2	5/20/2020	ADMIN Requester	Ordered	Test123	Watch
PR11817296	5/19/2020	ADMIN Requester	Ordered	Copy of Openbook Test	Watch
PR11810671	2/26/2020	ADMIN Requester	Ordered	Copy of 2.2_ARRA_1	Watch
PR13900-V2	1/8/2020	ADMIN Requester	Ordered	Copy of DoA Rewards and Recognition Awards	Watch
PR11813054	3/24/2020	ADMIN Requester	Ordering	Beacon with Bacon	Watch
PR11813055	3/24/2020	ADMIN Requester	Received	1A Smart Start, LLC	Watch

ID	Title	Date	Status
PR11818005	Test Requisition	5/29/2020	Submitted
PR11817993	Test	5/29/2020	Submitted
PR11817804	Test	5/27/2020	Submitted
EP4901828	Test	5/27/2020	Ordered
EP4901827	Test	5/27/2020	Ordered

- Due to the purchase order being fully received and closed, it will not appear in the list of purchase orders that require receiving. Instead, receivers must use the search bar at the top of the 'Receiving Steps' screen to locate the closed purchase order that needs to be reopened.

Note: Be sure to set the radio button to 'All' so that the closed order will appear in the search results.

Search the fully received order in the search bar with the radio button set to 'All.'

Order ID	Title	Date Created	Status	Supplier
EP4901179	TestReceipt	Fri, 8 May, 2020	Ordered	1157 designconcepts
EP4901210	TestReceipt	Mon, 11 May, 2020	Ordered	1157 designconcepts
EP4901317	TestingPO	Tue, 12 May, 2020	Receiving	Jarvis Property Restoration
EP4901337	Test Receiving	Tue, 12 May, 2020	Receiving	Jarvis Property Restoration

- Select the Order ID and then click the 'Reopen Order' button on the top of the screen. Doing so will change the status of the Purchase Order from 'Received' to 'Receiving.'

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Receiving a Line Item

Receiving Steps ERP Order EP4901469: ReceivingTest3

Select a receipt to work on or view. To select an item in the list, click its ID.

Note: This order is currently closed for receiving.

Reopen the purchase order to do further receiving.

1 Select Request

2 Select Receipt

3 Receive

4 Additional Info

5 Summary

Receipts - No Approval Needed

Receipts

Receipt ID ↑	Order ID	Title	Date	Status
RC4627	EP4901469	ReceivingTest3	Mon, 1 Jun, 2020	Approved

Order ID: EP4901469

Version: 1

Prev Next Exit

Select the 'Reopen Order' button.

- Once the order is reopened, the receiver may then submit a receipt to unreceive items (see **Section VI. Backing Out Previously Accepted Items/Unreceiving Items**).

VI. Backing Out Previously Accepted Items / Unreceiving Items

- If an incorrect amount was accepted or if a receiver needs to unreceive items for any reason, users will have the ability to back out the previously accepted line amount(s). This is also known as “negatively receiving” or “unreceiving” line items.

Note: If an order is fully received, the receiver will need to reopen the closed order before following the unreceiving process.

- On the **'Receiving Steps'** screen, enter the amount on the line item to unreceive as a negative number in the **'Accepted'** field (e.g. -3).

Notes:

- Receivers cannot unreceive an amount greater than what has previously been accepted with the same packing slip. For example, if an order had one good accepted under Packing Slip #1 and two goods accepted under Packing Slip #2, a receiver cannot unreceive three goods against only one packing slip. In that instance, the receipt would fail.
- Rejecting and Unreceiving are not the same thing. When an item is unreceived or “negatively accepted,” this information is passed to NCAS and the total quantity received in NCAS is reduced. Rejecting items is simply for internal purposes and does not transmit to NCAS.

- Enter the packing slip number that was originally used to receive the item in the **'Packing Slip'** field.

Notes:

- If the packing slip number is not known, the packing slip number can be found by looking at the history of the previous receipts, or by using an existing Public Report (Public Reports → Buying Reports → Receipt Reports → **Receipts with Packing Slip**).
- A packing slip number does not need to be entered when receiving or unreceiving line items with the Unit of Measure set as **'Dollar.'**

- Click on **'Submit.'**

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Receiving Steps Receipt RC5356: EP4901469 - ReceivingTest3

For a receipt, indicate the amount or quantity to accept or reject for each line item. You must provide comments to explain your action.

1 Select Request
2 Select Receipt
3 Receive

Order ID: EP4901469
Order Title: ReceivingTest3
Business Entity: 13EG

Date: Tue, 2 Jun, 2020
Processing Status: Receiving

The total amount previously received for this line item is seen in the **'Previously Accepted'** field.

After filling in the required information, click the **'Submit'** button.

Enter a negative amount in the **'Accepted'** field and the packing slip number in the **'Packing Slip'** field.

No.	Quantity	Full Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received	Packing Slip
1	10	TestReceipt	each		10	0	-3	0	7	Tue, 2 Jun, 2020	

Update Totals

Close Order: ☐ Yes ☒ No

VII. Adding Approvers to a Receipt

1. If a receiver has a reason to add an approver to a receipt, they are able to do so manually.
2. From the **'Receiving Steps'** page, and after entering the Accepted or Rejected amounts, the receiver will see the summary of the receipt that they are about to submit. (Step 5 on the left side of the screen).
3. Click the **'Approval Flow'** tab at the top of the page before hitting the **'Submit'** button.

Receiving Steps Receipt RC4624: EP4901467 - ReceivingTest5

Review the receipt, make changes as necessary, and then submit it for approval.

1 Select Request
2 Select Receipt
3 Receive
4 Additional Info
5 Summary

Order ID: EP4901467
Order Title: ReceivingTest5
Buying Entity: 13EG
FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.
My Labels: Apply Label...

Date: Tue, 2 Jun, 2020
Processing Status: Receiving

Click the **'Approval Flow'** tab in order to manually add approvers.

The **'Approval Flow'** tab will appear once the receiver reaches the **'Step 5 - Summary'** tab.

No.	Quantity	Full Description	Unit	Supplier Part Number	Prev. Accepted	Prev. Rejected	Accepted	Rejected	Total Received	Date Received	Packing Slip
1	5				5	0			5	Tue, 2 Jun, 2020	1234

Update Totals

Close Order: ☐ Yes ☒ No

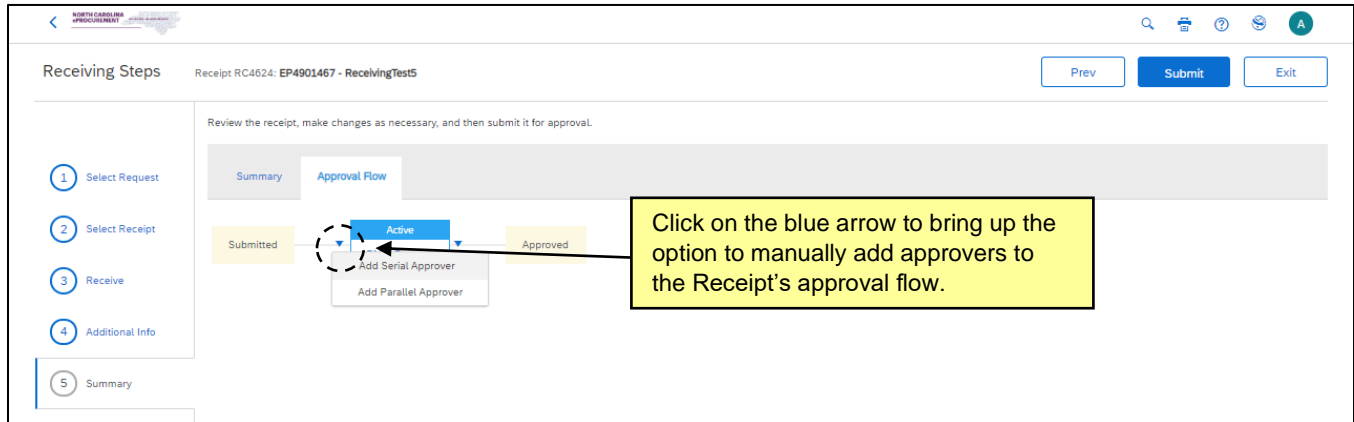
Comments - Entire Receipt

4. Click on a blue arrow to add an approver.

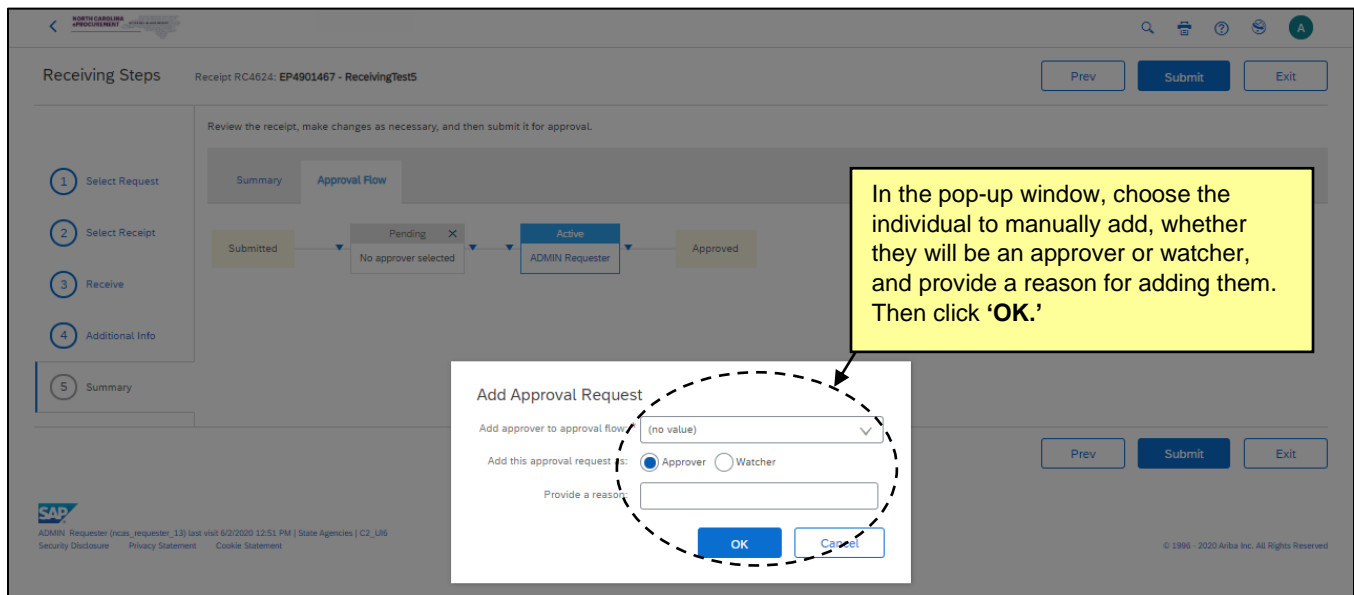
NC eProcurement

Receiving a Line Item

Note: If a receiver wants to add an approver in parallel, click on the first blue arrow in the approval flow. All other blue arrows will only allow the addition of serial approvers



5. In the **'Add Approval Request'** pop-up window, select the approver to add, whether they will be an approver or watcher, and a reason for adding them.



6. Click **'Submit.'**

VIII. Approving or Denying Receipts

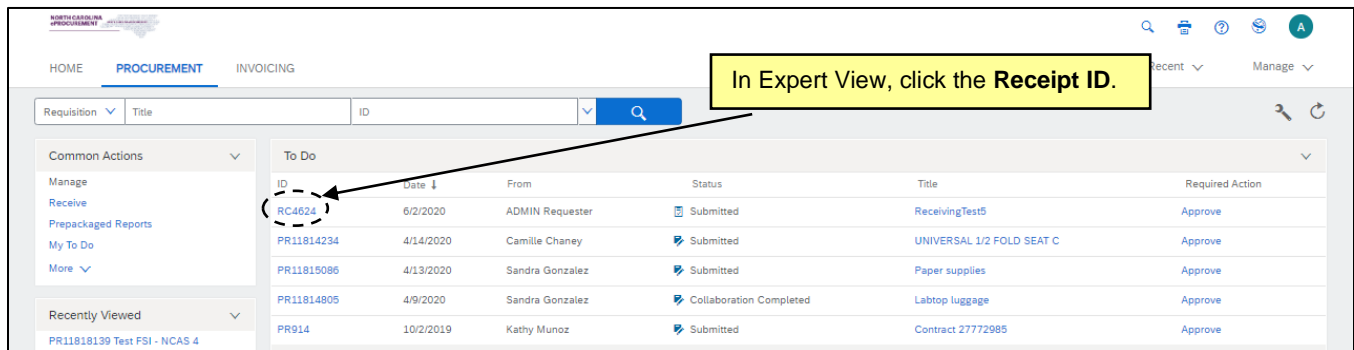
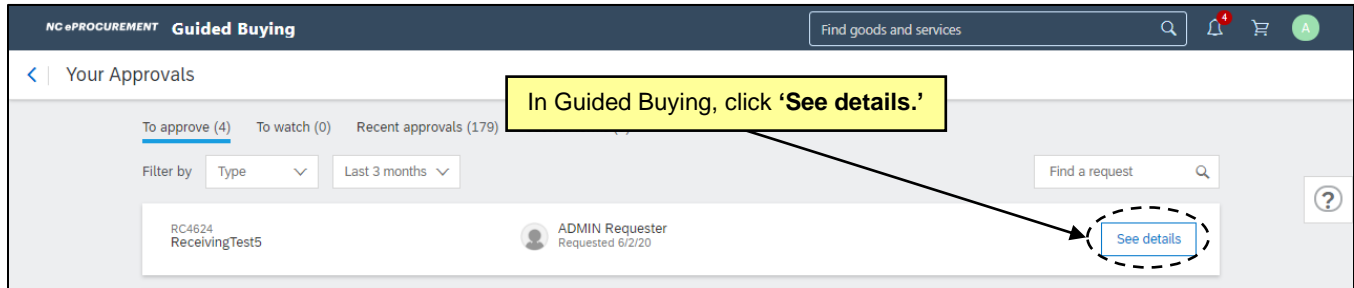
1. Receipt approvers can choose to approve or deny a receipt. Receipts that need to be approved will appear in the **'To Do'** portlet in Expert View, or in the **'Your Approvals'** tab in Guided Buying.

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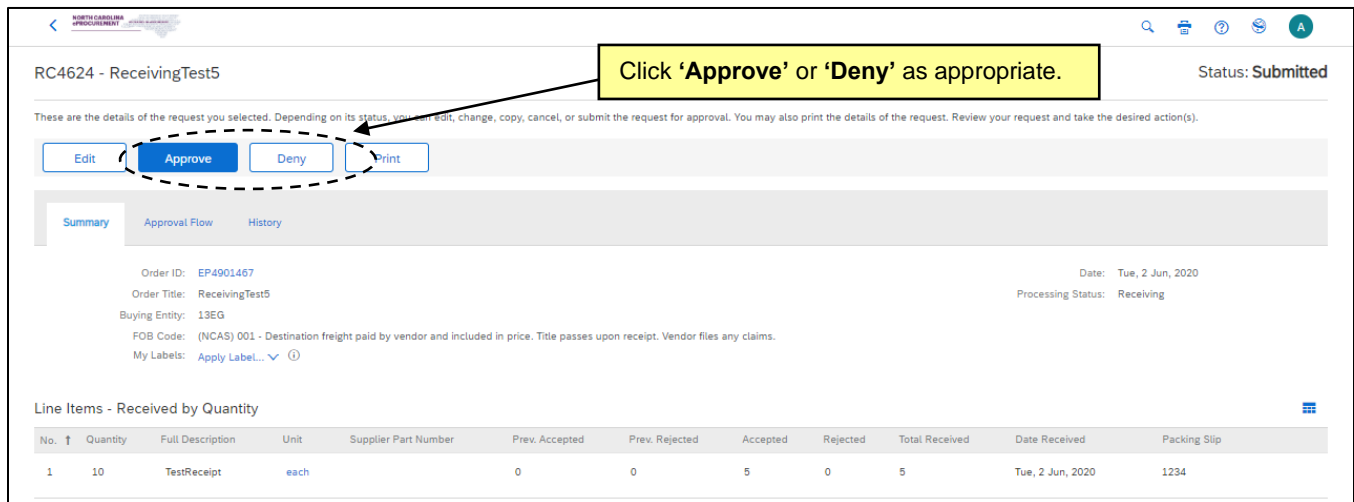
STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

- In Guided Buying, click on the **'See Details'** button. In Expert View, click on the Receipt ID to bring up the Approve/Deny page.



- This brings up the Approve/Deny screen.

Note: Although approving or denying a receipt can be accessed through either Guided Buying or Expert View, they will both divert to this screen.



- Click **'Approve'** or **'Deny'** accordingly.

Note: If a receipt is denied, comments on why the receipt was denied are required.

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Deny - Comments

Explain why you denied this request. Other users will see your comments.

You chose to deny RC4624.

Comments:

☒ Archive items to label:

OK **Cancel**

If denying a receipt, enter the reason for the denial in the comment box, then click 'OK.'

- Once a receipt has been denied, it cannot be re-submitted. The **'Denied'** receipt should be left as-is and the receiver should enter valid information on the new receipt created in **'Composing'** status.

Receiving Steps ERP Order EP4901467: **ReceivingTest5**

Select a receipt to work on or view. To select an item in the list, click its ID.

1 Select Request

2 Select Receipt

3 Receive

4 Additional Info

5 Summary

Receipts - Approval Needed

Receipts

Receipt ID	Order ID	Title	Date	Status
RC4624	EP4901467	ReceivingTest5	Tue, 2 Jun, 2020	Denied

Receipts - No Approval Needed

Receipts

Receipt ID	Order ID	Title	Date	Status
RC5379	EP4901467	ReceivingTest5		Composing

Order ID: EP4901467

The approver has denied the receipt, so the receiver must enter all new valid information into the new receipt that is in **'Composing'** status.

IX. Manually Closing Orders

- To manually close an order without receiving against it, a user must have purchasing agent rights within the system, or be granted access to the **'NC Close PO'** group.
- Navigate to the Purchase Order that is being closed using either the **'My Documents'** portlet or the Search bar.

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Search Type: Purchase Order

Change the search criteria or name, and then Search.

Search Filters

Order Title:

Buying Entity: (select a value) [select]

Bypass Approval: ☐ Yes ☐ No ☒ Either

Flow:

Close Order: No Choice

Date Created: Custom

From: Tue, 19 May, 2020

To: Tue, 2 Jun, 2020

Date Ordered: No Choice

FOB Code: No Choice

Order ID: EP4902017

Order Method: No Choice

Pass To Budget Officer: ☐ Yes ☐ No ☒ Either

Receipt Date (any receipt): No Choice

Receipt ID (any receipt):

Receipt Status (any receipt): No Choice

Requester: (select a value) [select]

Requisition ID:

Status: No Choice

Supplier: (select a value) [select]

Search Options

Search Search Reset Save Search

Search Results Found 1 Item

Order ID	Type	Title	Status	Date Created	Supplier Name	Total	Buying Entity	Pass To Budget Officer	FOB Code	Bypass Approval Flow
EP4902017	1	Test FSI - NCAS 6	Ordered	2 Jun 2020	Forms & Supply, Inc-FSIoffice	\$89.28480 USD	13EG	No	(NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.	

Label Print

3. Open the Purchase Order (not the Receipt ID) and click the **'Close'** button at the top of the screen.

EP4902017 - Test FSI - NCAS 6 Status: Ordered

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

Change Cancel Close Print

Summary Approval Flow Receipts Invoices Payments History

Order ID: EP4902017
Version: 1
Order Confirmation Status: Unconfirmed
Title: Test FSI - NCAS 6
Entity: 13 - Department of Administration
Supplier: Forms & Supply, Inc-FSIoffice
Contract ID: C464
Contact: Forms & Supply, Inc-FSIoffice
Close Order: Open
Pass To Budget Officer: No
FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.
Bypass Approval Flow:
My Labels: Apply Label...

Line Items

1 Line Item

Type	ReqID	Qty	Unit	Description	Supplier Part Number	Price	Discount	Net Amount	Charges	Taxes	Amount
PR11818148	12	each	Pendaflex 21-Pocket A-Z Tab Letter Expanding ...	PFXR217AHD	\$6.72000 USD	\$80.64000 USD	\$3.00000 USD	\$5.64480 USD	\$89.28480 USD		

Detail

4. On the **'Close Order'** screen, a drop-down menu provides six options to choose from, as well as a comment field. The six options and their definitions are as follows:

NC eProcurement

Receiving a Line Item

- a. **Order Closed for Change** indicates that the purchase order cannot be changed further.
- b. **Order Closed for Receiving** indicates that there can be no further receiving against this purchase order.
- c. **Order Adjusted and Closed for Receiving** indicates that orders can be adjusted to reflect the amount or quantities received and then closed for receiving.
- d. **Order Closed for Invoicing** indicates that there can be no further invoicing against this purchase order.
- e. **Order Closed for Receiving and Invoicing** indicates that there can be no receiving or invoicing for the purchase order.
- f. **Order Closed for All Actions** indicates that there can be no changes, receiving, or invoicing for the purchase order.

Note: Manually closing a purchase order in NC eProcurement via the **'Close'** button does not close the order within NCAS.

Select one of the six options in the **'Close Order'** drop down menu. Then add comments as appropriate.

- 5. Click the **'OK'** button.

Note: When an order is closed via the **'Close'** button on the purchase order, a receipt is created with **'0'** items Accepted or Rejected, the **'Close Order'** option is set to **'Yes.'** The information is not integrated with NCAS. The **'History'** tab displays two additional lines of information, one stating **'Order Closed'** and the other **'Received'** with an **'Amount accepted: \$0.00 USD.'**

NC eProcurement

Receiving a Line Item

EP4902017 - Test FSI - NCAS 6 Status: **Received**

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request and take the desired action(s).

[Reopen](#) [Print](#)

[Summary](#) [Approval Flow](#) [Receipts](#) [Invoices](#) [Payments](#) [History](#)

History

Date ↓	User	Real User	Action	Summary
Wed, 3 Jun, 2020 10:24 AM	aribasystem		Received	Amount accepted: \$0.00000 USD.
Wed, 3 Jun, 2020 10:24 AM	ADMIN Purchasing Agent	ADMIN Purchasing Agent	Order Closed	Order Closed. Comments
Tue, 2 Jun, 2020 1:00 PM	aribasystem		Ordered	Order EP4902017 was successfully sent via Ariba Network to Forms & Supply, Inc-FSIoffice : Forms & Supply, Inc-FSIoffice.
Tue, 2 Jun, 2020 1:00 PM	aribasystem		Ordered	Order EP4902017 was successfully carbon copied to the ERP system.

The purchase order now shows as closed in the history, with a received amount of \$0.00.

6. To reopen the closed order, see **Section V. Reopening a Closed Order.**