

## ePro and Pcards

Punchout orders are permitted to use Pcards as the payment method (unless their sticker indicates otherwise)

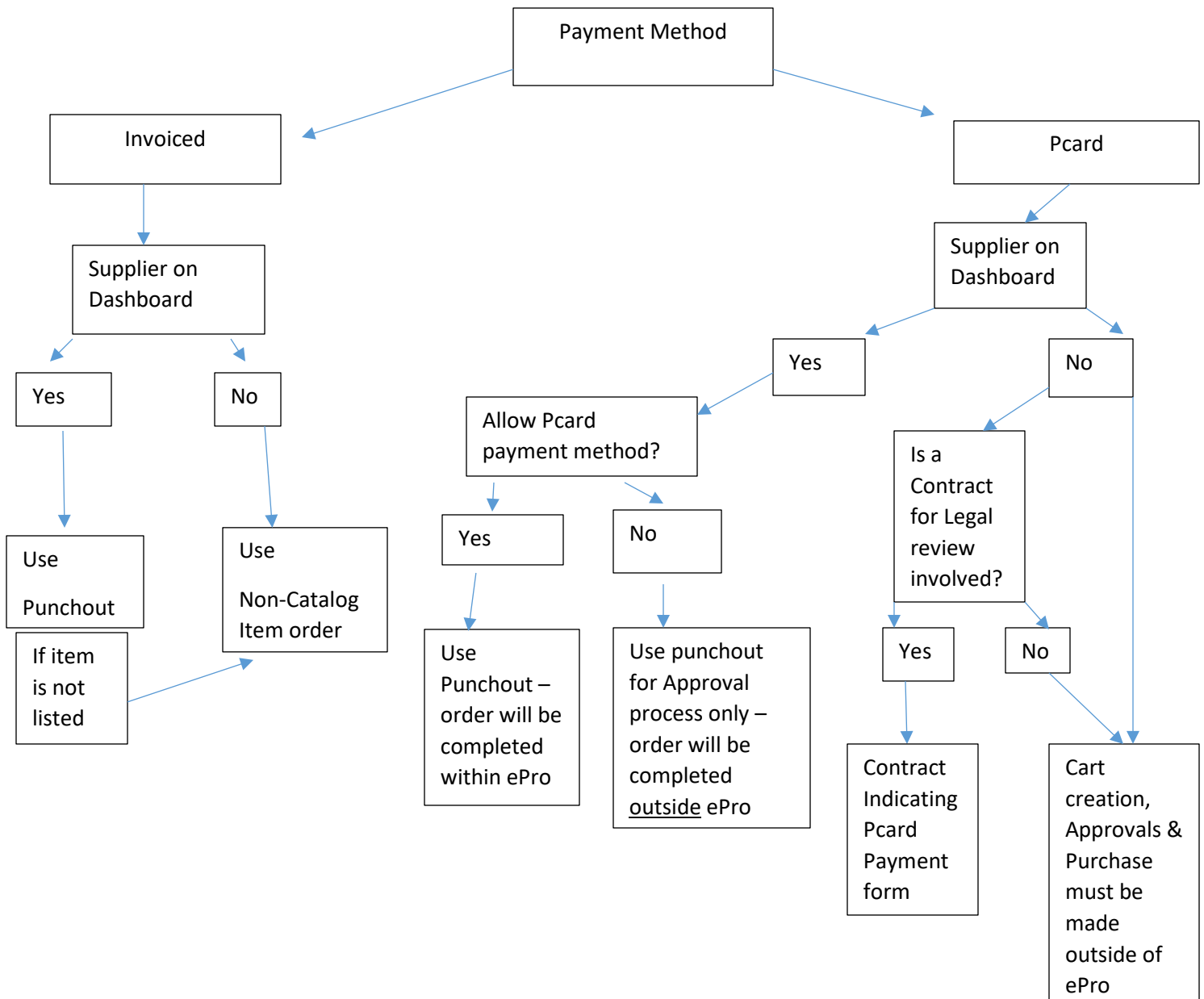
Non-Catalog Item orders do not have the capability for Pcard as a payment method since those purchase orders are delivered via email.

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?

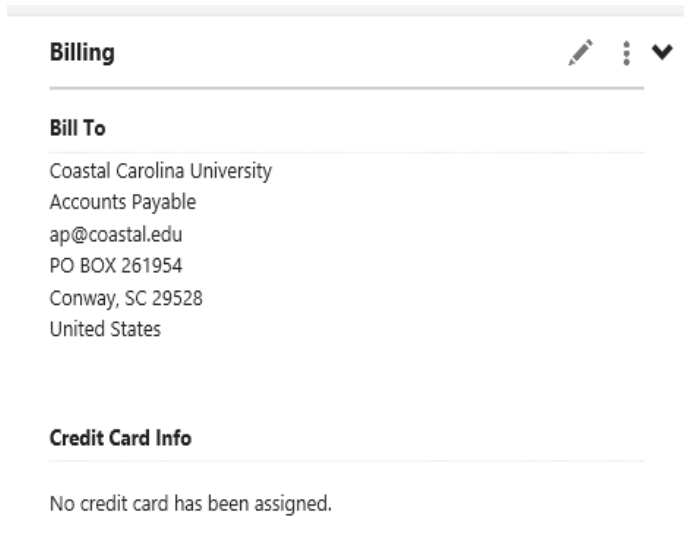


## ePro for P-cards

Punchout Suppliers:

P-cards can only 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**

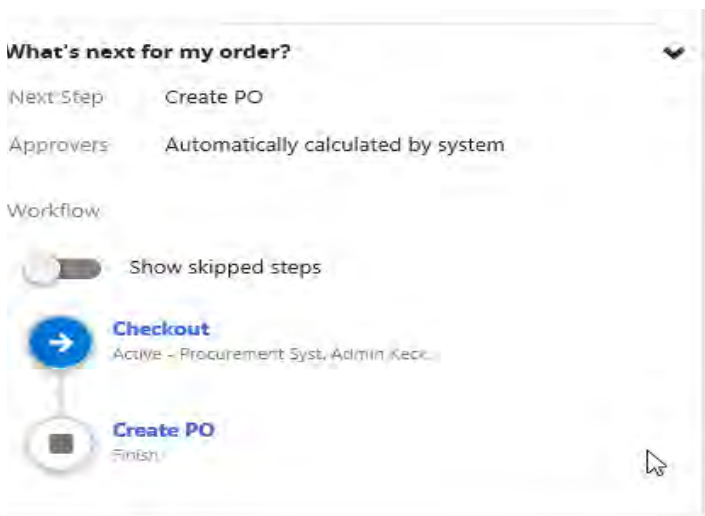
**Bill To**

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:

- Punchout to the Supplier
- Locate the Account or Order History area
- Print out the invoice ( must be itemized)
- 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:

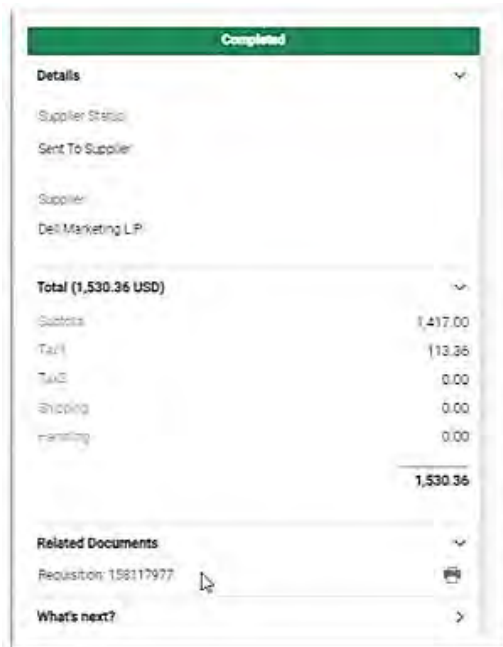
- Search for PO# utilizing the Document Search handout
- PO# C002464 – quick view version is obtained by clicking on the PRINT icon



- Print PO
- Circle or highlight the PO#

### HISTORY:

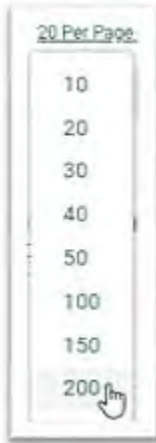
- This is the audit trail listing all comments, field updates, system messages, processes as well Approver action steps.
- ITS Approval will be indicated in here as well.
- Search for REQ# utilizing the Document Search handout Or
- Select the requisition number available on the PO under Related Documents



e. Open the History tab



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



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.

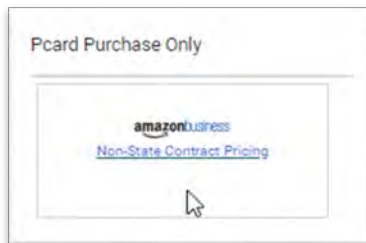
Some of Amazon's required fields must match to information entered on the ePro Cart side and is verified during the cXML order distribution. The credit card information and associated card holder is one of those fields. Pcard holder **must** be the end user to punchout and create the cart.

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](mailto:corporate-punchout@amazon.com), call [\(888\) 281-3847](tel:888-281-3847), or [chat](#) with a support team member.

On Dashboard locate the Punchout

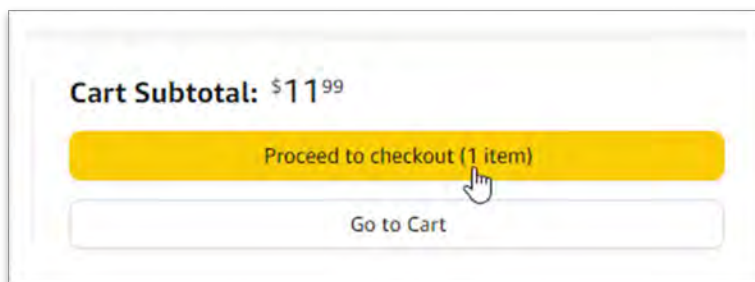


This is web based shopping and not a state contract supplier. As indicated on [our State Contracts page](#) "When such a contract exists for a needed good or service, and as a state agency, Coastal Carolina University is required to purchase the good or service through the contract and from the awarded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

**amazon.com** SIGN IN SHIPPING & PAYMENT GIFT OPTIONS PLACE ORDER

### Review your order

**This order requires approval.**

**Submit order for approval**

By placing your order, you agree to the Amazon Business Accounts Terms and Conditions and Amazon's privacy notice.

#### Order Summary

Items:	\$11.99
Shipping & handling:	\$5.99
Total before tax:	\$17.98
Estimated tax to be collected:	\$1.44
<b>Order total:</b>	<b>\$19.42</b>

How are shipping costs calculated?  
Why didn't I qualify for free shipping?

**Group**  
Punchout Users (Coastal Carolina University)  
Change

**Payment method** Change  
VISA ending in 2841

**Add a gift card, promotion code, or voucher**  
Enter Code

**Billing address** Change  
Casey Keck  
PO BOX 261954  
CONWAY, SC 29528-6054  
United States

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

**Estimated Delivery: Depends on Approval**  
(For example, if approved now, Tuesday, July 19, 2022)

**The Skin You Live In**  
by Tyler, Michael  
\$11.99 & FREE Returns  
Quantity: 1 Change  
Sold by: Amazon.com Services LLC

**Choose a delivery option:**  
 Tuesday, July 19  
\$5.99 - Shipping

Do you need help? Explore our [Help pages](#) or [contact us](#).

For an item sold by Amazon.com: When you click the "Place your order" button, we'll send you an email message acknowledging receipt of your order. Your contract to purchase an item will not be complete until we send you an email notifying you that the item has been shipped.

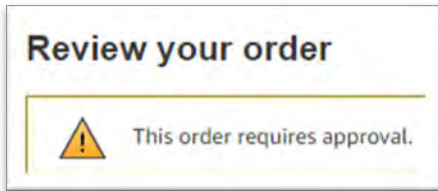
Colorado, Louisiana and Puerto Rico Purchasers: Important information regarding sales tax you may owe in your State

Within 30 days of delivery, you may return new, unopened merchandise in its original condition. Exceptions and restrictions apply. See Amazon.com's Returns Policy

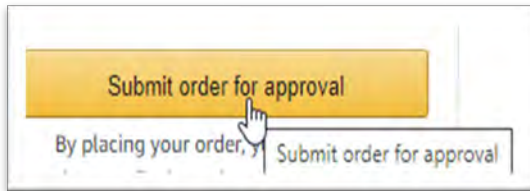
[Go to the Amazon.com homepage](#) without completing your order.

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





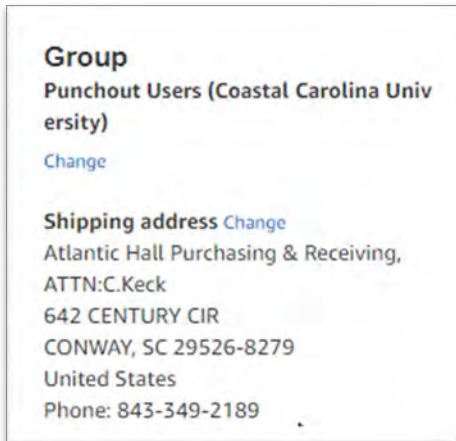
and



and



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



Verify that the Payment method is that of the Pcard holder



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](mailto:corporate-punchout@amazon.com), call (888) 281-3847, or chat with a support team member.