IRF PORTAL HELPFUL INFORMATION

BACKGROUND

Anything that needs shipped to our branches by EPI must have an Inventory Request Form (IRF) completed by the requestor in order to begin the process. The IRF application collects information about the materials being distributed to our branches, whether distribution occurs via the One Box or the item is for sale in EPI's catalog on Ariba.

Item Owner: When an item owner logs into the IRF application they will be presented with a summary of all active items they have submitted. Item owners may only make updates to their own items.

Administrator: Users with administrative access will be able to see all active items (not just their own submissions) and they will be able to make edits to any item.

ITEM PURPOSE

When creating a new IRF, you will be asked to select the purpose(s) for which you are creating the item:

- **Ariba – The item will be made available for branches to order on Ariba but will not be shipped the One Box**
- **One Box** – The item will be included in an upcoming One Box distribution but will not be made available on Ariba
- **One Box and Ariba** – The item will be included in an upcoming One Box distribution and will also be made available for branches to order on Ariba
- **Inventory Only –** The item should be kept in inventory at EPI; it will not be shipped via the One Box or made available for order on Ariba

You will then need to fill in as much information as possible for each purpose selected. If any fields for your selected purpose(s) are left empty, the Item Status will indicate the IRF is Incomplete (see below) and you will receive notices until the information is filled in. Purposes can be edited if plans change before the item is sent to branches or made available on Ariba.

ITEM STATUS

There are two, color-coded item status options:

1. **Incomplete** (red) **–** Insufficient information has been provided for the purpose(s) selected. You will need to edit the IRF and fill in any missing information.
2. **Complete** (green) – All required information has been entered for the purpose(s) selected and nothing else needs to be done.

CREATING AND EDITING ITEMS

Creating a New IRF: From the HOME page, click NEW IRF in the top-right corner.

Editing an Existing IRF: From the HOME page, find the IRF you wish to edit then click the **Edit** button on the right side.

Copy Item feature: If the IRF you need to enter has the same, or similar, specifications as another item already entered into the IRF portal, you can save some time by using the **Copy Item** button to automatically fill in most of the IRF form. Simply enter the item number of an item that is already on the portal into the **Item Number** field then click the **Copy Item** button. This will fill in all but the **One Box**, **Ariba Date to be added, Ariba Date to be removed**, and **Existing Item Number being Replaced** fields. Then, simply edit the **Item Number** field, fill in the empty fields—if needed—and review the other fields to see if any of the data needs to be changed.

Confirmation email: Once an IRF has been submitted, the user will receive a confirmation email containing the item details.

DISTRIBUTION RULE

You have two options for describing who should receive your material(s):

1. **Text Box:** A text box located on the item details page allows you to describe your target audience (i.e. geography, branch type, quantity per location, etc.). Multiple rules can be separated in the text box with commas.
2. **Custom List:** If you want your item(s) sent to specific branches without a describable common feature, you can upload an Excel file with a list of cost centers by clicking the Browse button.

   Note: If you have uploaded a custom list and wish to change it, you can simply upload a new Excel file over the previously uploaded file. The IRF application will replace the previously uploaded file with the new one. While there is currently no way to remove an uploaded list, it can be replaced by uploading a blank Excel file or you may also email the Chase Team at ChaseAMTeam@epiinc.com and instruct them to ignore the uploaded list for that item.

HOW TO ADD A NEW VENDOR

If you do not see the vendor for your item in the Item Vendor dropdown list, please send an email with the following information to ChaseAMTeam@epiinc.com and we will add them to the list within 48 hours so you can complete this field on your IRF:

- Vendor Name
- Vendor Address (including city, state, zip, and country)
- Vendor Contact Name & Title
- Vendor Email
- Vendor Phone

NOTIFICATIONS

Whenever an item is created or changed, an email showing the updated values for the item is sent to the item owner and appropriate team members. If an item owner submits an incomplete IRF, they will receive weekly emails reminding them there are still fields they need to fill in until either the Material Due Date for One Box items or the Ariba add date for Ariba items. For items that are both, the One Box Material Due date will be used.

DELIVERY INFORMATION

Once the IRF is complete, a PO# will be provided to the item owner to be placed on the Bill of Lading (BOL) in order for EPI to receive the materials into the warehouse.

EPI will receive materials and locate in inventory within one (1) business day after physical receipt from the shipper.

The address of the EPI receiving area is:
EPI Fulfillment
Attn: JPMC #9934
65 Clark Road
Battle Creek, MI 49037

Receiving and appointment scheduling phone: (269) 964-4600 x5818
Receiving Fax: (269) 968-1187
Receiving Email: 65ClarkReceiving@epiinc.com

EPI CONTACT INFORMATION

The EPI account management team can be contacted at ChaseAMTeam@epiinc.com.

ONE BOX SCHEDULE

To see the current One Box schedule, please follow this link.