

## SRM – Tips and Reminders MM User Group Meeting January 31, 2014





## Tips and Reminders- Shopping Cart



### "Unknown" Account Assignment Category

- Approver who adds the account information MUST add the account assignment information to each line item.
  - If the account assignment information is not added to each line item, the shopping cart will be returned to the shopping cart creator.
  - Shopping cart creator will have to create a new shopping cart.
- Shopping carts should be created by using the ESS folder



# Tips and Reminders – Shopping Cart



### @ Editing a Rejected Shopping Cart

- User must click on "Show my Task" button after selecting the rejected shopping cart from your work list.
- SRM200U Online Training Course Manage a Rejected
  Shopping Cart
- uPerform Business Process Procedure (BPP): SRM ESS
  Manage Rejected Shopping Cart



# Tips and Reminders – Purchase Order



### © Select "Limit Item" ONLY when creating a Framework Purchase Order

#### @ "Save" button

 Use to save the document before completion. The "Save" button holds but does not order the purchase order.

#### @ "Check" button

- Use the "Check" button before clicking on the "Order" button.
- Fix "Backend" errors before "Order." Otherwise "Edit" button disappears.



# Tips and Reminders – Purchase Order



#### @ "Order" button

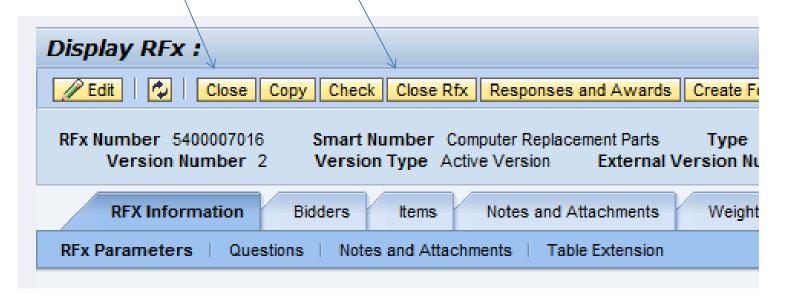
 Use to advance when the PO is complete and ready to send to the vendor.



### Tips and Reminders – RFx



- @ "Use "Close" button in published version of RFx
  - Do not click on "Close RFx." Using this could result in marking the document "Transaction Complete."





## Tips and Reminders – Contracts SCEIS



#### Contracts

 Release: Use this button after all information on contract has been entered.