

Supplier Relationship Management (SRM) 7.2

How to Add a Line Item(s) to a Purchase Order from an Approved Shopping Cart

Situation:

The approved Shopping Cart (SC) had multiple line items. However, the buyer failed to select all of the approved line items at the time the Purchase Order (PO) was created. In the example that follows, the SC, 2000856540, had 4 line items, but the buyer selected only 2 line items.

1. SC was created for 4 line items as shown below:

Display Shopping Cart

Number 2000856540 Document Name HOW TO ADD SC TO PO Status Approved Created On 10/29/2014 11:15:05 Created By Fred PEPER

▼ General Data

Buy on Behalf of: Fred PEPER Header Approval Note:

Name of shopping cart:

Header Data: [Values](#)
 Approval Process: [Display / Edit Agents](#)
 Document Changes: [Display](#)

▼ Item Overview

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Ass
1	Material		Cable, Copper (Cat. SE 6 etc) Including	83828	Cable, Copper CAT5E 6 Components, Conn	1	EA	11.11 USD			1		10/29/2014	0	0	Cost Center
2	Material		Cable, Copper for ESPN	83828	Cable, Copper CAT5E 6 Components, Conn	2	EA	22.22 USD			1		10/29/2014	0	0	Cost Center
3	Material		Cable, Copper, for SCEIS Channel	83828	Cable, Copper CAT5E 6 Components, Conn	3	EA	33.33 USD			1		10/29/2014	0	0	Cost Center
4	Material		Cable, Copper, CAT 6 for Weather Channel	83828	Cable, Copper CAT5E 6 Components, Conn	4	EA	44.44 USD			1		10/29/2014	0	0	Cost Center

- At the time of Assign Sources of Supply: Step 1 (Select Requisition), the buyer only selected line items 1 & 2.

Assign Sources of Supply: Step 1 (Select Requisition)

Previous Next Close

1 2 3 4

Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items) Summary Screen (No Documents)

▼ Search Criteria: Requisitions

Number of Requisition: 2000856540 Name of Requisition: Settings

Item Description: Product Category: Product: Supplier: Requester: External Requirement: Purchasing Organization: Account Assignment Category: Purchasing Group: Account Assignment Number: Priority: Intended for Grouping: Delivery Date Range: Include Locked Items: Delivery Date: To: Search

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items Settings

Requisition / Item Number	External Item Number	Category	Quantity	Unit	Requester	Supplier Name	Contract	Manufacturer	Delivery Date	Description
• 2000856540/1	83828		1	EA	Fred PEPER				10/29/2014	Cable, Copper (Cat. 5E 6 etc) including
• 2000856540/2	83828		2	EA	Fred PEPER				10/29/2014	Cable, Copper for ESPN
• 2000856540/3	83828		3	EA	Fred PEPER				10/29/2014	Cable, Copper for SCEIS Channel
• 2000856540/4	83828		4	EA	Fred PEPER				10/29/2014	Cable, Copper, CAT 6 for Weather Channel

- At Step 2, because only line items 1 & 2 were selected, only those line items will be sourced with a PO.

Assign Sources of Supply: Step 2 (Assign Sources of Supply (2 Items))

Previous Next Save Close

1 2 3 4

Select Requisition Assign Sources of Supply (2 Items) Review Drafts (No Items) Summary Screen (No Documents)

Select All Expand All Collapse All Change Refresh Propose Sources of Supply Create Draft Replace Item with Catalog Item Undo Replacement Remove Assign to My Purchasing Group

Requisition / Item Number	Document Name	Document Number	Draft Type	Item Number	External Item Number	Configurable Item Number	Description	Variant	Category Description	Priority	Quantity	Unit
• 2000856540/1							Cable, Copper (Cat. 5E 6 etc) Including		Cable, Copper CAT5E 6 Components ,Conn		1	EA
• 2000856540/2							Cable, Copper for ESPN		Cable, Copper CAT5E 6 Components ,Conn		2	EA

4. At Step 3, Assign Sources of Supply: Step 3 (Review Drafts (2 Items)), notice that the PO will only be sourced with the 2 line items selected from the previous step/selection.

Assign Sources of Supply: Step 3 (Review Drafts (2 Items))

1 — 2 — 3 — 4

Select Requisition Assign Sources of Supply (No Items) **Review Drafts (2 Items)** Summary Screen (No Documents)

▼ Created Drafts

Draft Name	Draft Type	Supplier Number	Supplier	Transaction Type
HOW TO ADD A LINE ITEM FROM A SC TO A PO	Purchase Order	700046565	GRAYBAR ELECTRIC INC	ZSTD : SCEIS Standard PO

Details of Selected Drafts Local Purchase Order1 FPIEPR 10/29/2014

Requisition / Item Number	Configurable Item Number	Description	Category	Quantity	Unit	Supplier Number	Supplier Name	Info Record	Net Price
• 2000856540 / 1		Cable, Copper (Cat. 5E 6 etc) Including	83828	1	EA				11.11
• 2000856540 / 2		Cable, Copper for ESPN	83828	2	EA				22.22

5. When the PO, 4600374121, was processed it only contained 2 line items.

Display Purchase Order

[Print Preview](#)
[Check](#)
[Close](#)
[Copy](#)
[Export](#)
[Related Links](#)

Purchase Order Number: **4600374121**
 Purchase Order Type: SCEIS Standard PO
 Status: Ordered
 Document Date: 10/29/2014
 Total Value (Gross): 60.00 USD
 Smart Number:
 Supplier: [GRAYBAR ELECTRIC INC](#)

[Overview](#)
[Header](#)
[Items](#)
[Notes and Attachments](#)
[Approval](#)
[Tracking](#)

General Header Data

Smart Number:
 Note to Supplier:

Smart Number is External

Purchase Order Number:
 Internal Note:

Supplier: * [GRAYBAR ELECTRIC INC](#)

Requester: * [Fred PIEPER](#)

Recipient: [Fred PIEPER](#)

Location: [SC First Steps](#)

Ship-To Address: [SCEIS Root](#)

Purchasing Organization: *

Purchasing Group: * [Show Members](#)

Total Value (Net):

Default Settings: [Set Values](#)

Item Overview

[Details](#)
[Add Item](#)
[Copy](#)
[Paste](#)
[Duplicate](#)
[Delete](#)
[Undelete](#)
[Propose Sources of Supply](#)
[Add Condition](#)
[Remove Condition](#)
[Exercise Option](#)
[Order as Direct Material](#)
[Process All Items](#)

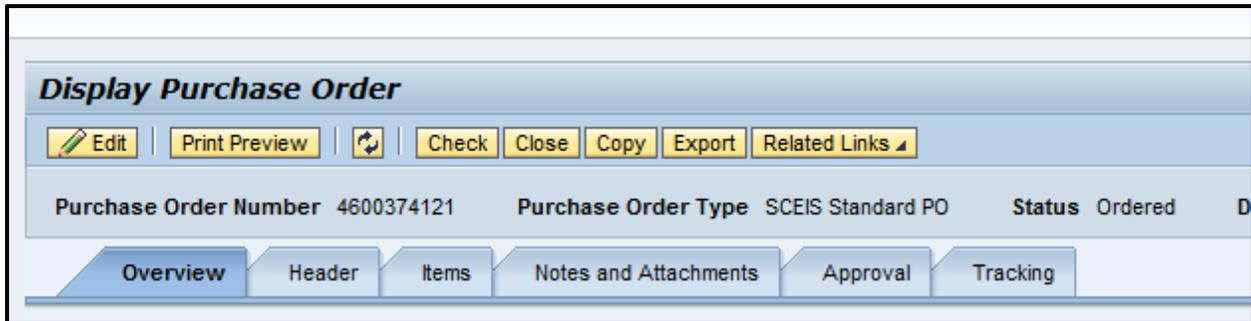
Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date
1		Material	1		Cable, Copper (Cat. 5E 6 etc) Including	83828	1	EA	USD	1	11.11					10/29/2014
2		Material	2		Cable, Copper for ESPN	83828	2	EA	USD	1	22.22					10/29/2014

6. The PO 4600374121 contains 2 line items and not the 4 line items that the buyer intended.

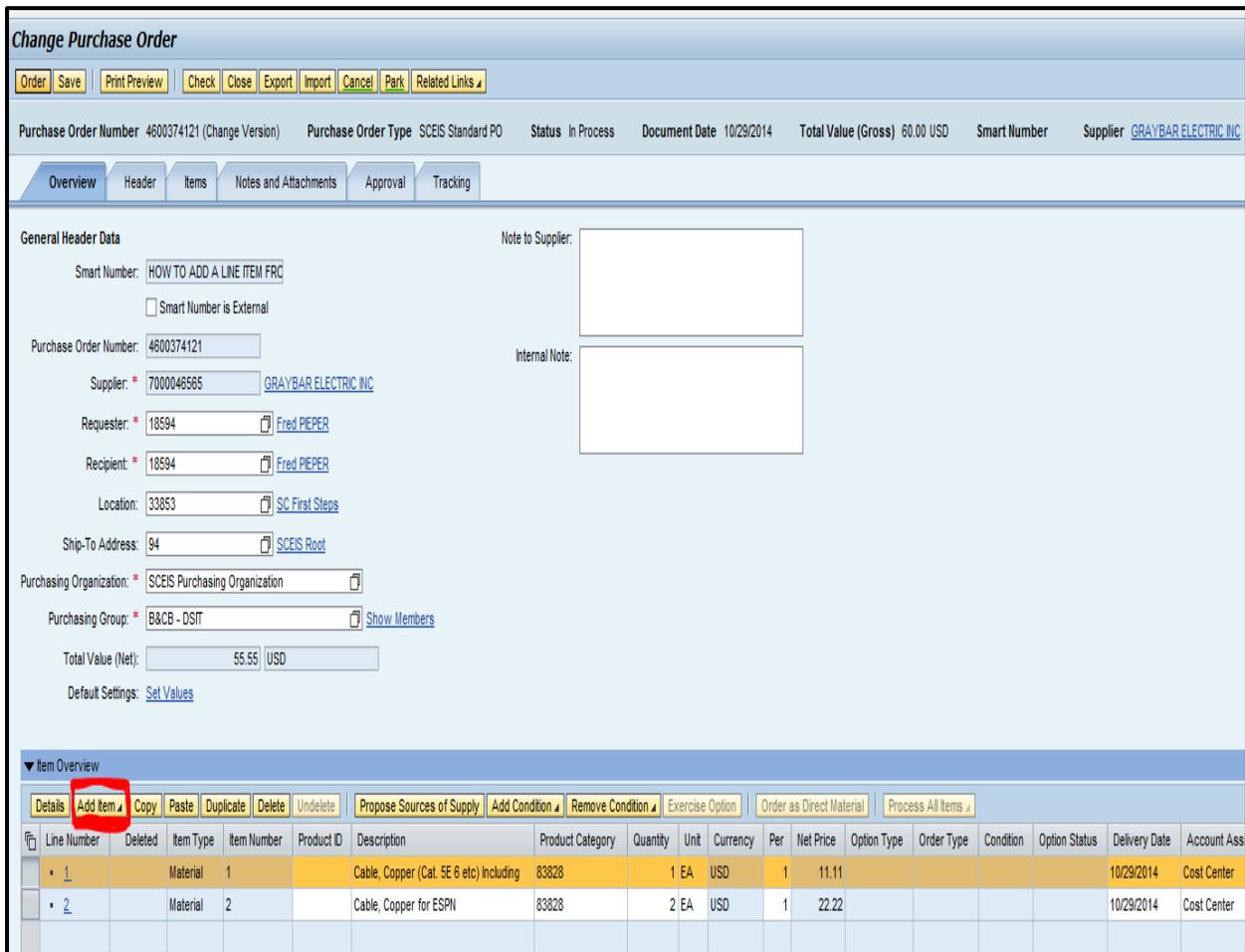
PURCHASE ORDER						Page 1 of 1
		Purchasing Office B&CB DSIT 4430 Broad River Road Columbia SC 29210		SC First Steps		Invoice To: B&CB Internal Operations Attn: Accounts Payable 1201 Main Street, Suite 400 Columbia SC 29201
		Purchase Order: 4600374121 Date Issued: 10/29/2014 PO Number must appear on all Invoices and Delivery Slips.		Payment Terms: within 30 Days 0.000 Percent Discount.		
Vendor: 7000046565 GRAYBAR ELECTRIC INC 745 SUNSET BLVD WEST COLUMBIA SC 29169 USA		Deliver To: The State of South Carolina B&CB - DSIT - Browning Road 1628 Browning Rd COLUMBIA SC 29210-4012 USA				
INSTRUCTIONS TO VENDOR						
Item No	QTY	Order UOM	Description	Unit Price	Amount	
001	1	EA	Cable, Copper (Cat. 5E 6 etc) Including Delivery Date:10/29/2014	11.1100	11.11	
Subtotal:					11.11	
002	2	EA	Cable, Copper for ESPN Delivery Date:10/29/2014	22.2200	44.44	
Subtotal:					44.44	
Total Value:					55.55 USD	
Created By: Fred PIEPER Authorized Signature If received electronically, printed name represents authorized signature for this document All Sales to the State of South Carolina (SC) are subject to the SC sales and use tax laws, unless such sales are otherwise exempt. The Contractor/Vendor will collect such tax as required.						

Corrective Action:

7. Display the PO and place the PO in Edit mode by clicking on the “Edit” button.



8. After you place the PO in Edit mode, the yellow “Add Item” button will be available for you to select.



- When you select the yellow "Add Item" button, a drop-down menu list will appear which will contain multiple options for adding a line item to the PO. In this scenario, there was a previously approved SC, 2000856540; (with 4 line items) so "Old Shopping Cart" is selected.

https://sapms5q.sc.gov/NavigationTarget=navurl%3A%2F%2F0fafef6c73b84773ee5478f07e90cc2&PrevN - Windows Internet Explorer

Change Purchase Order

Order Save Print Preview Check Close Export Import Cancel Park Related Links

Purchase Order Number: 4600374121 (Change Version) Purchase Order Type: SCEIS Standard PO Status: In Process Document Date: 10/29/2014 Total Value (Gross): 60.00 USD Smart Number Supplier: GRAYBAR ELECTRIC, INC

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: HOW TO ADD A LINE ITEM FRG
 Smart Number is External

Note to Supplier:

Purchase Order Number: 4600374121
 Supplier: * 700046565 GRAYBAR ELECTRIC, INC
 Internal Note:

Requester: * 16594 Fred PEPPER
 Recipient: * 16594 Fred PEPPER
 Location: 33863 SC First Sites
 Ship-To Address: 94 SCEIS Root

Purchasing Organization: * SCEIS Purchasing Organization
 Purchasing Group: * B&CB - DSIT Show Members

Total Value (Net): 55.55 USD
 Default Settings: Set Values

Item Overview

Details Add Item Copy Paste Duplicate Delete Undo Propose Sources of Supply Add Condition Remove Condition Exercise Option Order as Direct Material Process All Items Filter Settings

Line	Item	Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number	
1	Old Shopping Cart	Material	1		Cable, Copper (Cat. 5E 6 etc) Including	83828	1	EA	USD	1	11.11					10/29/2014	Cost Center	F030REA100	
2	SHI Punch Out Catalog	Material	2		Cable, Copper for ESPN	83828	2	EA	USD	1	22.22					10/29/2014	Cost Center	F030REA100	
	Troxell																		
	Fasiental																		
	Fisher Scientific																		
	Granger																		
	MSC Industrial																		
	WGP/Contract Search																		
	Spectrum																		
	Staples																		
Total Value (Net) 55.55 USD Total Tax 4.45 USD Total Value (Gross) 60.00 USD																			

- After selecting "Old Shopping Cart," enter the number of the SC. In this example, number 2000856540 is entered. Then select the yellow "Search" button. The system will retrieve the SC number you entered and display it in the Search Results.

Change Purchase Order

Order Save Print Preview Check Close Export Import Cancel Park Related Links

Purchase Order Number: 4600374121 (Change Version) Purchase Order Type: SCEIS Standard PO Status: In Process Document Date: 10/29/2014 Total Value (Gross): 60.00 USD Smart Number: Supplier: GRAYBAR ELECTRIC INC

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: HOW TO ADD A LINE ITEM FRC
 Smart Number is External

Purchase Order Number: 4600374121

Supplier: * 7000046565 GRAYBAR ELECTRIC INC

Requester: * 18594 Fred PEPER

Recipient: * 18594 Fred PEPER

Location: 33853 SC First Steps

Ship-To Address: 94 SCEIS Root

Purchasing Organization: * SCEIS Purchasing Organization

Purchasing Group: * B&CB - DSIT Show Members

Total Value (Net): 55.55 USD

Default Settings: Set Values

Note to Supplier:

Internal Note:

Add Items from Old Shopping Carts and Templates

Number of Shopping Cart: 2000856540 Name of Shopping Cart:

Item Description: Time Frame:

Product Category: Include Product Category Hierarchy:

Include Completed Shopping Carts: Bought on Behalf:

External Requirement: Status: Approved

Search

Search Results: 1 Shopping Carts

Name / Number	Created on	Description	Quantity	Unit	Net / Total Value	Currency	Status text
HOW TO ADD SC TO PO 2000856540	10/29/2014		0.000		333.30	USD	Approved

OK Cancel

▼ Item Overview

Details Add Item Copy Paste Duplicate Delete Undelete Propose Sources

Line Number	Deleted	Item Type	Item Number	Product ID	Description
1		Material	1		Cable, Copper (Cat...
2		Material	2		Cable, Copper for ES...

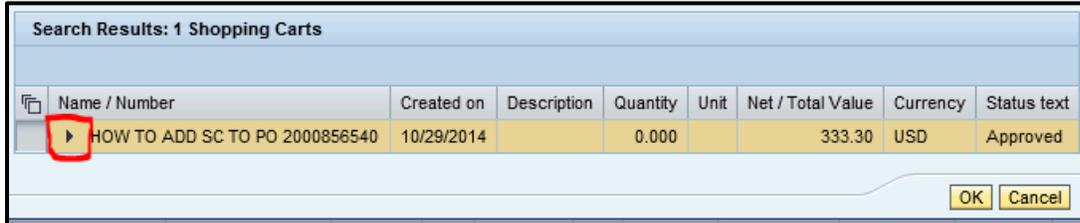
Status Delivery Date

10/29/2014

10/29/2014

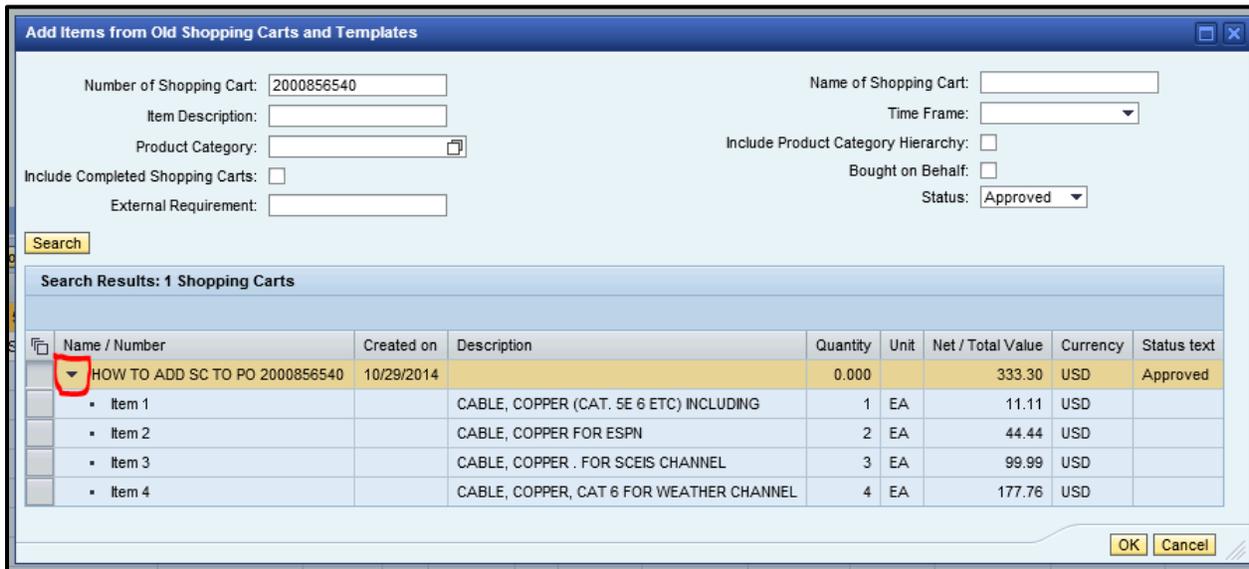
11. Expand the SC by selecting the black triangle under the “Name/Number” column.

This is a critical step. If you highlight the row and select “OK” without expanding the SC, then the system will retrieve all of the SC line items and insert them into the PO as line items.



Name / Number	Created on	Description	Quantity	Unit	Net / Total Value	Currency	Status text
HOW TO ADD SC TO PO 2000856540	10/29/2014		0.000		333.30	USD	Approved

12. After expanding the SC by using the black triangle, select the line items you want to add.



Name / Number	Created on	Description	Quantity	Unit	Net / Total Value	Currency	Status text
HOW TO ADD SC TO PO 2000856540	10/29/2014		0.000		333.30	USD	Approved
▪ Item 1		CABLE, COPPER (CAT. 5E 6 ETC) INCLUDING	1	EA	11.11	USD	
▪ Item 2		CABLE, COPPER FOR ESPN	2	EA	44.44	USD	
▪ Item 3		CABLE, COPPER . FOR SCEIS CHANNEL	3	EA	99.99	USD	
▪ Item 4		CABLE, COPPER, CAT 6 FOR WEATHER CHANNEL	4	EA	177.76	USD	

13. Highlight the line items you wish to add to the PO. In this example, line items 3 & 4 were highlighted. Then click the “OK” button.

Add Items from Old Shopping Carts and Templates

Number of Shopping Cart: 2000856540 Name of Shopping Cart:

Item Description: Time Frame:

Product Category: Include Product Category Hierarchy:

Include Completed Shopping Carts: Bought on Behalf:

External Requirement: Status: Approved

Search Results: 1 Shopping Carts

Name / Number	Created on	Description	Quantity	Unit	Net / Total Value	Currency	Status text
HOW TO ADD SC TO PO 2000856540	10/29/2014		0.000		333.30	USD	Approved
Item 1		CABLE, COPPER (CAT. 5E 6 ETC) INCLUDING	1	EA	11.11	USD	
Item 2		CABLE, COPPER FOR ESPN	2	EA	44.44	USD	
Item 3		CABLE, COPPER . FOR SCEIS CHANNEL	3	EA	99.99	USD	
Item 4		CABLE, COPPER, CAT 6 FOR WEATHER CHANNEL	4	EA	177.76	USD	

14. The system will “add” lines 3 & 4 into the PO.

Change Purchase Order

Shopping cart 2000856540/3 has different transaction type to the purchase order

Shopping cart 2000856540/4 has different transaction type to the purchase order

Purchase Order Number 4600374121 (Change Version) Purchase Order Type SCEIS Standard PO Status In Process Document Date 10/29/2014 Total Value (Gross) 359.97 USD Smart Number Supplier GRAYBAR ELECTRIC INC

Overview Header **Items** Notes and Attachments Approval Tracking

Item Overview

Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number
1		Material	1		Cable, Copper (Cat. 5E 6 etc) Including	83828	1	EA	USD	1	11.11					10/29/2014	Cost Center	F030REA100
2		Material	2		Cable, Copper for ESPN	83828	2	EA	USD	1	22.22					10/29/2014	Cost Center	F030REA100
3		Material	3		Cable, Copper for SCEIS Channel	83828	3	EA	USD	1	33.33					10/29/2014	Cost Center	F030REA100
4		Material	4		Cable, Copper, CAT 6 for Weather Channel	83828	4	EA	USD	1	44.44					10/29/2014	Cost Center	F030REA100

Total Value (Net) 333.30 USD
Total Tax 26.67 USD
Total Value (Gross) 359.97 USD

15. Yellow warning messages will appear. The yellow warning messages are stating the fact that line items 3 & 4 never originally went through Assign Source of Supply, Step 2; nor Assign Source of Supply Step 3, Review Drafts. This yellow warning message is acceptable in this situation because you are adding the line item(s) that were missed/omitted when the PO was originally created. These line items (3 & 4) will be added to the PO and the PO will retain its original Transaction Type, in this example ZSTD, SCEIS Standard PO.

Click the “Order” button.

Change Purchase Order

Order Save Print Preview Check Close Export Import Cancel Park Related Links ▾

⚠ Shopping cart 2000856540/3 has different transaction type to the purchase order
 ⚠ Shopping cart 2000856540/4 has different transaction type to the purchase order

Purchase Order Number 4600374121 (Change Version) Purchase Order Type SCEIS Standard PO Status In Process Document Date 10/29/2014 Total Value (C

Overview Header **Items** Notes and Attachments Approval Tracking

▼ Item Overview

Details Add Item ▾ Copy Paste Duplicate Delete Undelete Propose Sources of Supply Add Condition ▾ Remove Condition ▾ Exercise Option Order as Direct Material

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Currency	Per	Net Price	C
▪ 1		Material	1		Cable, Copper (Cat. 5E 6 etc) Including	83828	1	EA	USD	1	11.11	
▪ 2		Material	2		Cable, Copper for ESPN	83828	2	EA	USD	1	22.22	
▪ 3		Material	3		Cable, Copper . for SCEIS Channel	83828	3	EA	USD	1	33.33	
▪ 4		Material	4		Cable, Copper, CAT 6 for Weather Channel	83828	4	EA	USD	1	44.44	

16. Once the PO is in an "Ordered" status, you can print the PO and display the 4 line items.

PURCHASE ORDER						Page 1 of 1
		Purchasing Office B&CB DSIT 4430 Broad River Road Columbia SC 29210		SC First Steps		Invoice To: B&CB Internal Operations Attn: Accounts Payable 1201 Main Street, Suite 400 Columbia SC 29201
Purchase Order: 4600374121 Date Issued: 10/29/2014 PO Number must appear on all Invoices and Delivery Slips.			Payment Terms: within 30 Days 0.000 Percent Discount.			
Vendor: 7000046565 GRAYBAR ELECTRIC INC 745 SUNSET BLVD WEST COLUMBIA SC 29169 USA			Deliver To: The State of South Carolina B&CB - DSIT - Browning Road 1628 Browning Rd COLUMBIA SC 29210-4012 USA			
INSTRUCTIONS TO VENDOR						
Item No	QTY	Order UOM	Description	Unit Price	Amount	
001	1	EA	Cable, Copper (Cat. 5E 6 etc) Including Delivery Date:10/29/2014	11.1100	11.11	
Subtotal:					11.11	
002	2	EA	Cable, Copper for ESPN Delivery Date:10/29/2014	22.2200	44.44	
Subtotal:					44.44	
003	3	EA	Cable, Copper . for SCEIS Channel Delivery Date:10/29/2014	33.3300	99.99	
Subtotal:					99.99	
004	4	EA	Cable, Copper, CAT 6 for Weather Channel Delivery Date:10/29/2014	44.4400	177.76	
Subtotal:					177.76	
Total Value:					333.30 USD	
Created By: Fred PIEPER Authorized Signature If received electronically, printed name represents authorized signature for this document All Sales to the State of South Carolina (SC) are subject to the SC sales and use tax laws, unless such sales are otherwise exempt. The Contractor/Vendor will collect such tax as required.						

17. Now that line items 3 & 4 have been sourced, you will not find the SC 2000856540 and any of its line items to be sourced, because they have all been sourced.

Assign Sources of Supply: Step 1 (Select Requisition)

Previous Next Close

No requisition found; verify your entries

1 2 3 4

Select Requisition Assign Sources of Supply (No Items) Review Drafts (No Items) Summary Screen (No Documents)

Search Criteria: Requisitions

Number of Requisition: 2000856540 Name of Requisition:

Item Description: Product Category:

Product: Supplier:

Requester: External Requirement:

Purchasing Organization: Account Assignment Category:

Purchasing Group: Account Assignment Number:

Priority: Intended for Grouping:

Delivery Date Range: Include Locked Items:

Delivery Date: To:

Search

Select All Expand Collapse Hide Subordinate Outlines All Categories Reject Items Settings

Requisition / Item Number	External Item Number	Category	Quantity	Unit	Requester	Supplier Name	Contract	Manufacturer	Delivery Date	Description

18. Screenshots 19 and 20 display the document numbers and their status under the “Related Documents” tab. It also indicates the SC and its appropriate line item, 2000856540/3 and 2000856540/4.

19.

Details for Item 3 Cable, Copper . for SCEIS Channel

General Data Prices and Conditions Account Assignment Notes and Attachments Approval Preview Related Documents Delivery Extended PO History

Order as Direct Material

Document Control

Purchase Order Response Invoice Expected

Shipping Notification Confirmation-Based Invoice Verification

Goods Receipt / Confirmation of Performance of Service Evaluated Receipt Settlement

Statistics

Goods Receipt / Confirmation of Performance of Service Invoice

Confirmed Quantity: 0 EA Invoiced Quantity: 0 EA

Confirmed Value: 0.00 USD Invoiced Value: 0.00 USD

No Further Confirmation Yes No No Further Invoice Yes No

History

View: United States Dollar

Document	Name	Document Number	Back-End Document Number	Status
Shopping Cart	Cable, Copper . for SCEIS Channel	<u>2000856540/3</u>		Follow-on Document Created
	Total			
Purchase Order	Cable, Copper . for SCEIS Channel	4600374121/3	4600374121/3	Ordered
	Total			

20.

Details for Item 4 Cable, Copper, CAT 6 for Weather Channel

General Data | Prices and Conditions | Account Assignment | Notes and Attachments | Approval Preview | **Related Documents** | Delivery | Extended PO History

Order as Direct Material

Document Control

Purchase Order Response Invoice Expected
 Shipping Notification Confirmation-Based Invoice Verification
 Goods Receipt / Confirmation of Performance of Service Evaluated Receipt Settlement

Statistics

Goods Receipt / Confirmation of Performance of Service

Confirmed Quantity: EA
Confirmed Value: USD
No Further Confirmation Yes No

Invoice

Invoiced Quantity: EA
Invoiced Value: USD
No Further Invoice Yes No

History

View:

Document	Name	Document Number	Back-End Document Number	Status
Shopping Cart	Cable, Copper, CAT 6 for Weather Channel	2000856540/4		Follow-on Document Created
	Total			
Purchase Order	Cable, Copper, CAT 6 for Weather Channel	4600374121/4	4600374121/4	Ordered
	Total			

Congratulations! You have completed the purchasing process of the SC and its 4 line items.