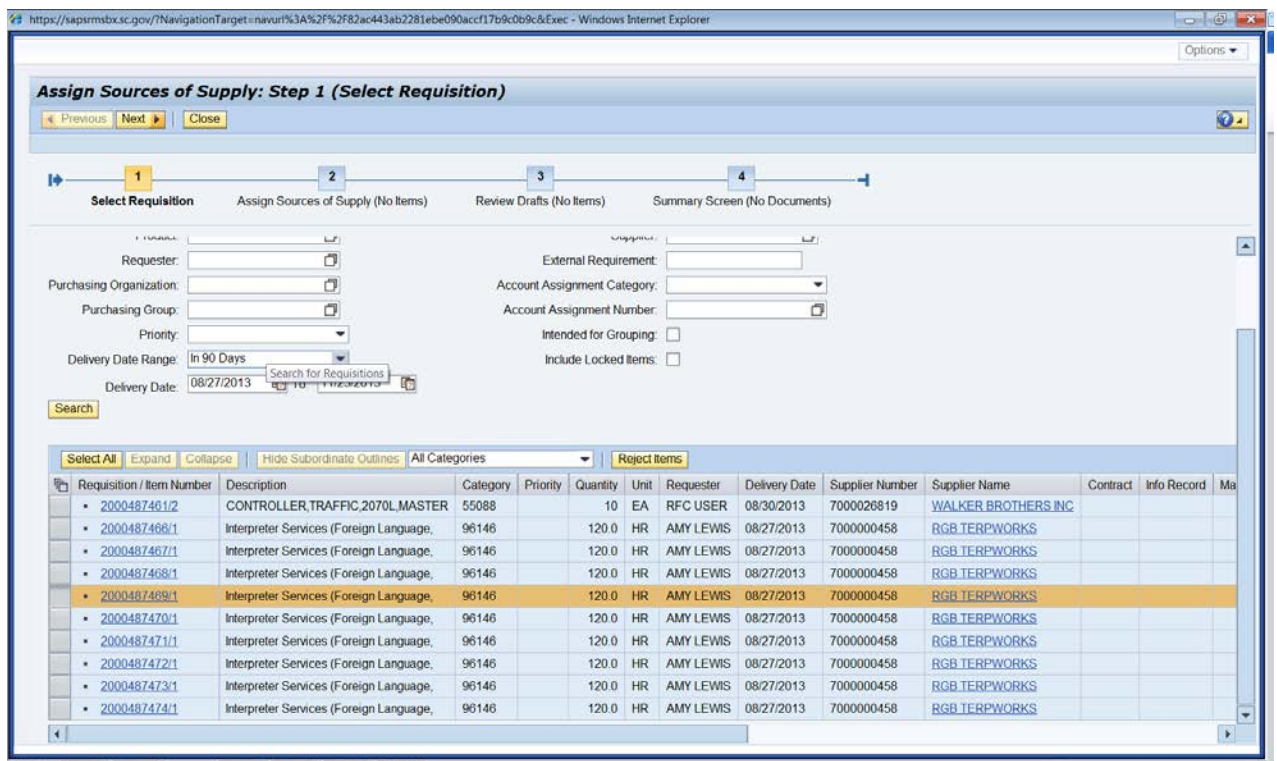


Exercise 3

Create a Blanket Purchase Order

Exercise 3: Create a ZBLT Blanket PO

1. Log into SRM.
2. Click **Purchasing** folder across the top of the screen.
3. Click **Purchasing** in the blue menu bar on the left-hand side.
4. Scroll to the bottom of the blue menu bar, click **Perform Sourcing**.
5. Use drop-down menu of the delivery date range field to select **In 90 Days** (Delivery Date Range is the suggested method to locate a broader range of Shopping Carts/Requisitions).
6. Click yellow **Search** button to display approved Shopping Carts/Requisitions/Item numbers.
7. Highlight the line of the Requisition you want to source by clicking the grey box parallel to the Requisition/Item Number.
8. Click **Next**.



Assign Sources of Supply: Step 1 (Select Requisition)

Navigation: Previous | Next | Close

Progress: 1 Select Requisition | 2 Assign Sources of Supply (No Items) | 3 Review Drafts (No Items) | 4 Summary Screen (No Documents)

Requester: [Text Box] External Requirement: [Text Box]

Purchasing Organization: [Text Box] Account Assignment Category: [Dropdown]

Purchasing Group: [Text Box] Account Assignment Number: [Text Box]

Priority: [Dropdown] Intended for Grouping:

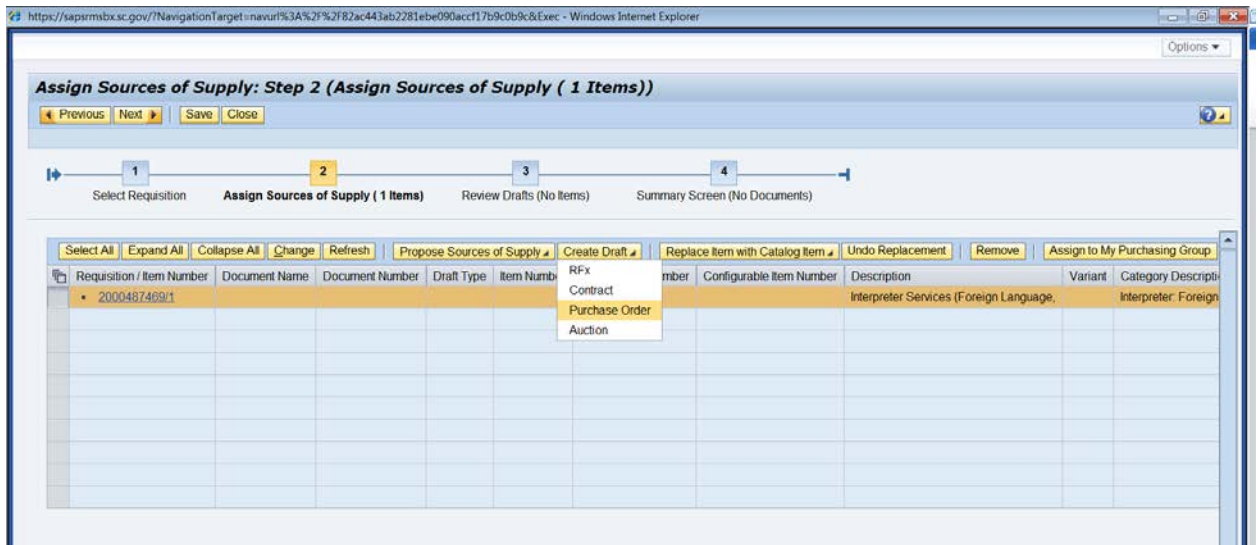
Delivery Date Range: In 90 Days Search for Requisitions [Text Box] Include Locked Items:

Delivery Date: 08/27/2013 [Text Box]

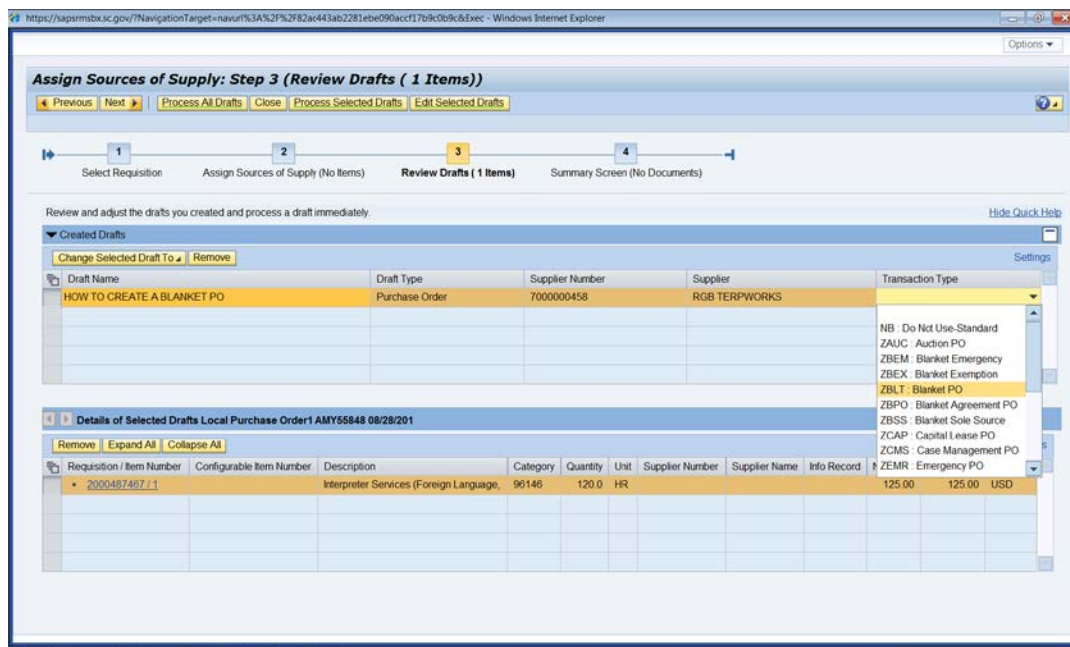
[Search]

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name	Contract	Info Record	Ma
2000487461/2	CONTROLLER,TRAFFIC,2070L_MASTER	55088		10	EA	RFC USER	08/30/2013	7000026819	WALKER BROTHERS INC			
2000487468/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487467/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487468/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487469/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487470/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487471/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487472/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487473/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			
2000487474/1	Interpreter Services (Foreign Language,	96146		120.0	HR	AMY LEWIS	08/27/2013	7000000458	RGB TERPWORKS			

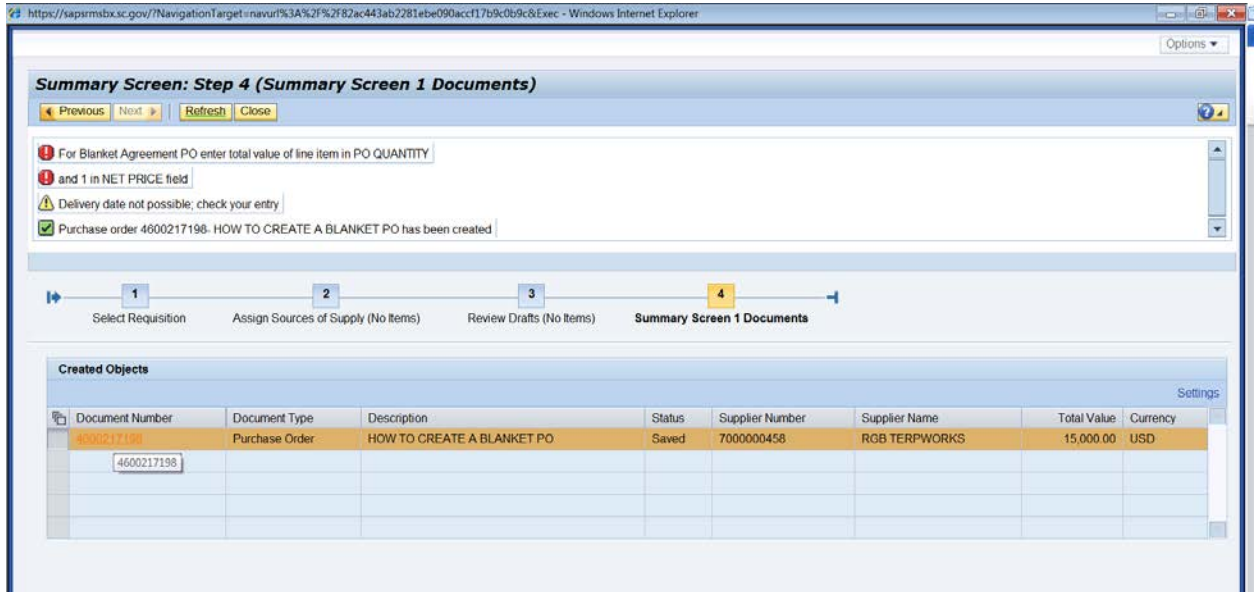
9. Click **Create Draft**. Using the drop-down, select **Purchase Order** (this automatically takes you to step 3).



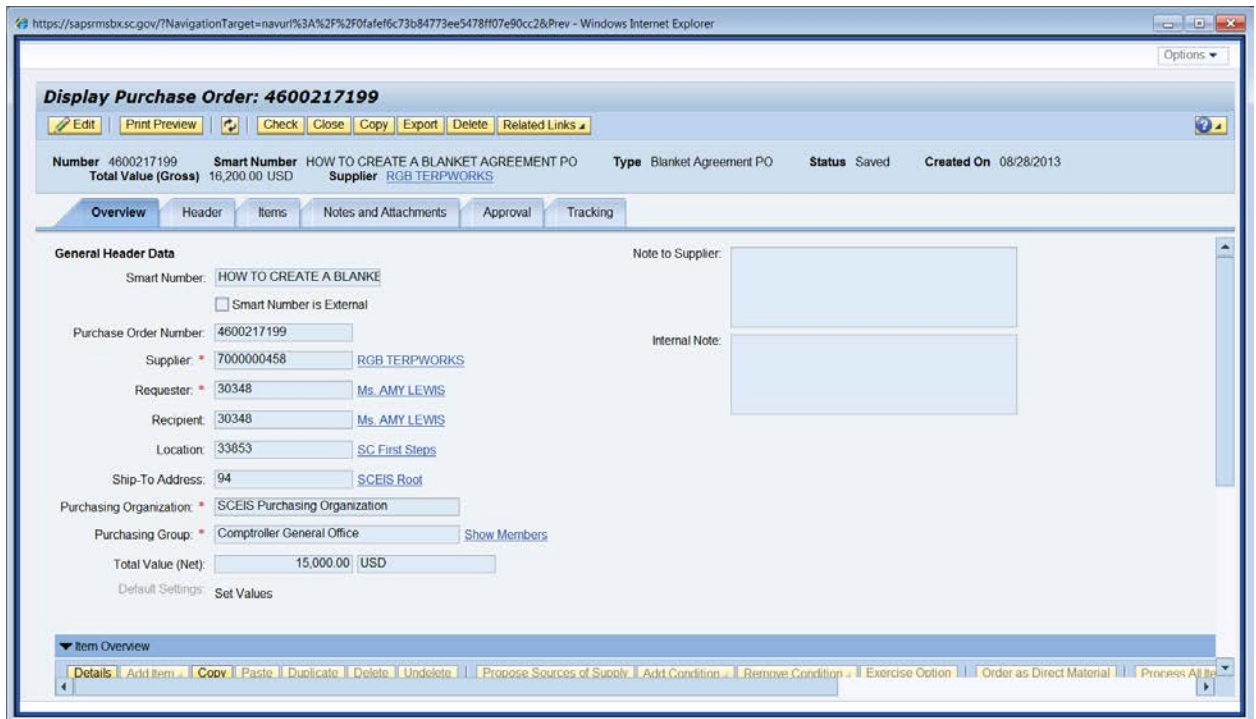
10. In **Draft Name** field, change the name to PO Exercise 3. In the **Transaction Type** field, use the drop down menu to select **ZBLT Blanket PO**. Click **Process Selected Drafts**. NOTE: Once the Transaction Type has been selected it cannot be changed. If the PO type needs to be changed after creation, the PO must be deleted and a new PO issued.



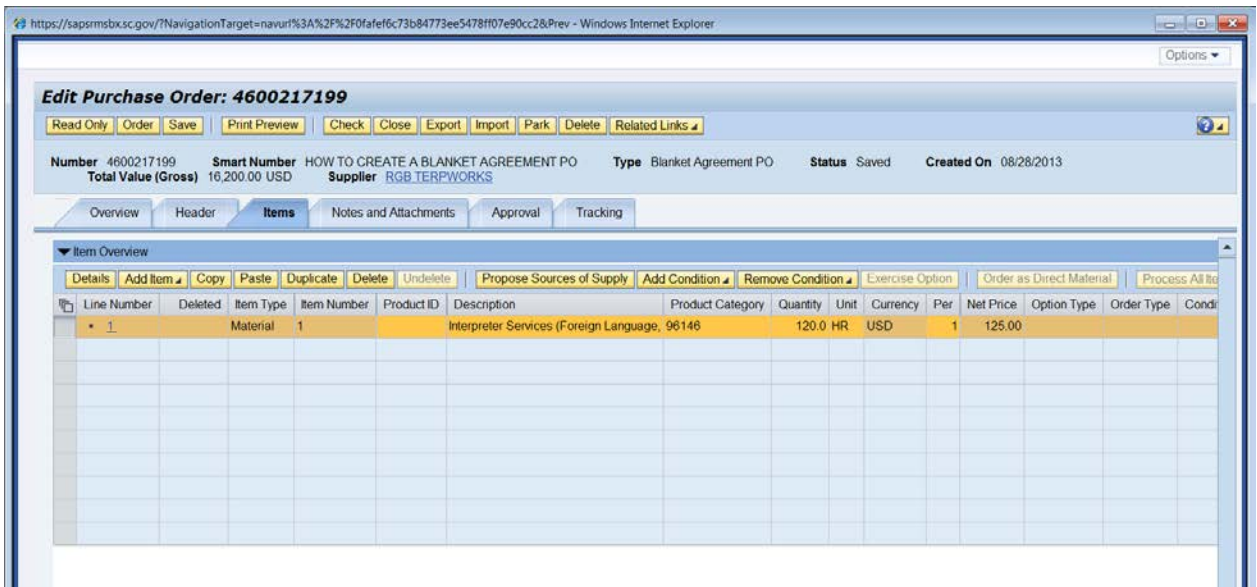
- You will receive red hard stop error to remind you to change your quantity and price for all Blanket POs. Click the hyperlink to open the PO in a new window.



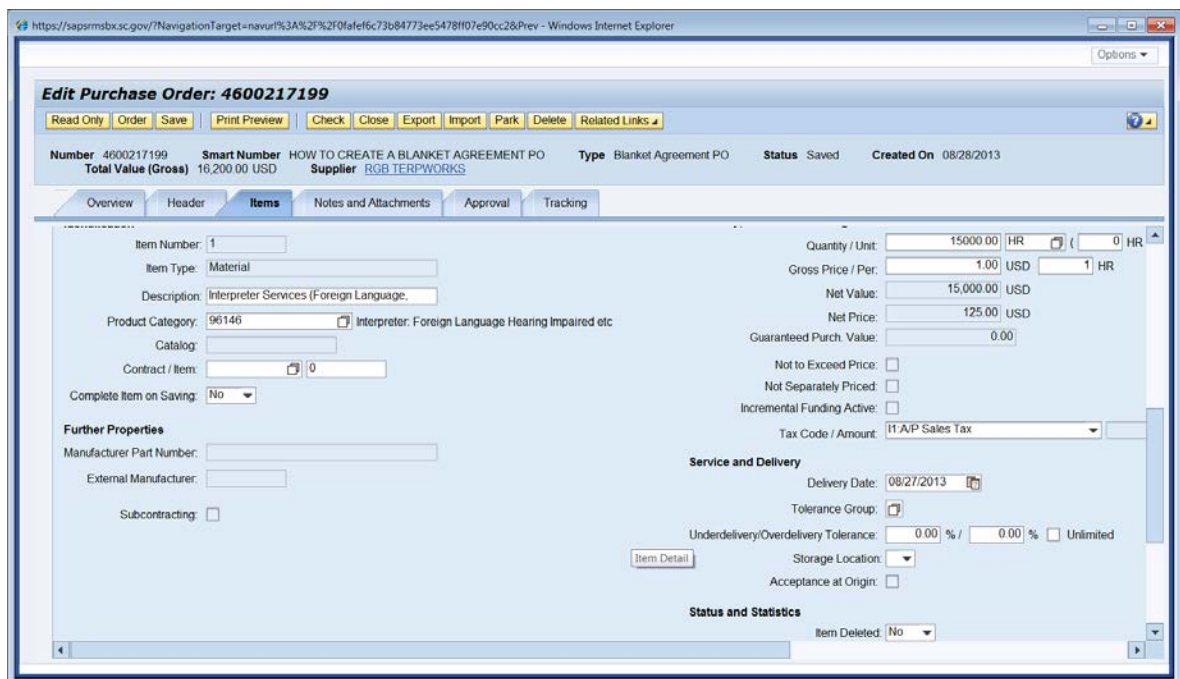
- Click **Edit**.



13. Click Items tab, select the line item to update, and click Details.



14. Scroll down to update the Quantity/Unit field and the Gross Price/Per field. The Quantity/Unit field equals the total dollar value of the PO. The Gross Price/Per field is \$1.00. If the total value of the Purchase Order includes tax change the Tax Code/Amount from AP Sales Tax to Tax Exempt.



15. Click on **Header** tab, enter today's date in the **Start of validity** field and one year from today's date in the **To** field.

Edit Purchase Order: 4600217199

Read Only Order Save Print Preview Check Close Export Import Park Delete Related Links

Number 4600217199 Smart Number HOW TO CREATE A BLANKET AGREEMENT PO Type Blanket Agreement PO Status Saved Created On 08/28/2013
 Total Value (Gross) 16,200.00 USD Supplier RGB TERPWORKS

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

General Data Notes and Attachment Output Budget Document Totals Extended PO History Payment User-Specified Status

Purchasing Organization: SCEIS Purchasing Organization Document Date: 08/28/2013
 Purchasing Group: Comptroller General Office FM Posting Date: 08/28/2013
 Start of validity: 08/28/2013 Posting Period: 002
 To: 08/27/2015 Parked:
 Cancelled:
 Closeout Status: None
 Selective Release Status:

Partner

Function	Number	Name	Phone Number
Requester	30348	AMY LEWIS	
Vendor	7000000458	RGB TERPWORKS	(803) 837-8157
Service Agent			
Goods Recipient	30348	AMY LEWIS	
Ship-To Address	94	SCEIS Root	(803) 734-5011
Location	33853	SC First Steps	

16. After all updates are complete, click **Order**. Click **Refresh** to change your **Status** from **Awaiting Approval** to **Ordered**.

Edit Purchase Order: 4600217199

Read Only Order Save Print Preview Check Close Export Import Park Delete Related Links

Purchase order HOW TO CREATE A BLANKET AGREEMENT PO with document number 4600217199 is correct.

Number 4600217199 Smart Number HOW TO CREATE A BLANKET AGREEMENT PO Type Blanket Agreement PO Status **Ordered** Created On 08/28/2013
 Total Value (Gross) 16,200.00 USD Supplier RGB TERPWORKS

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

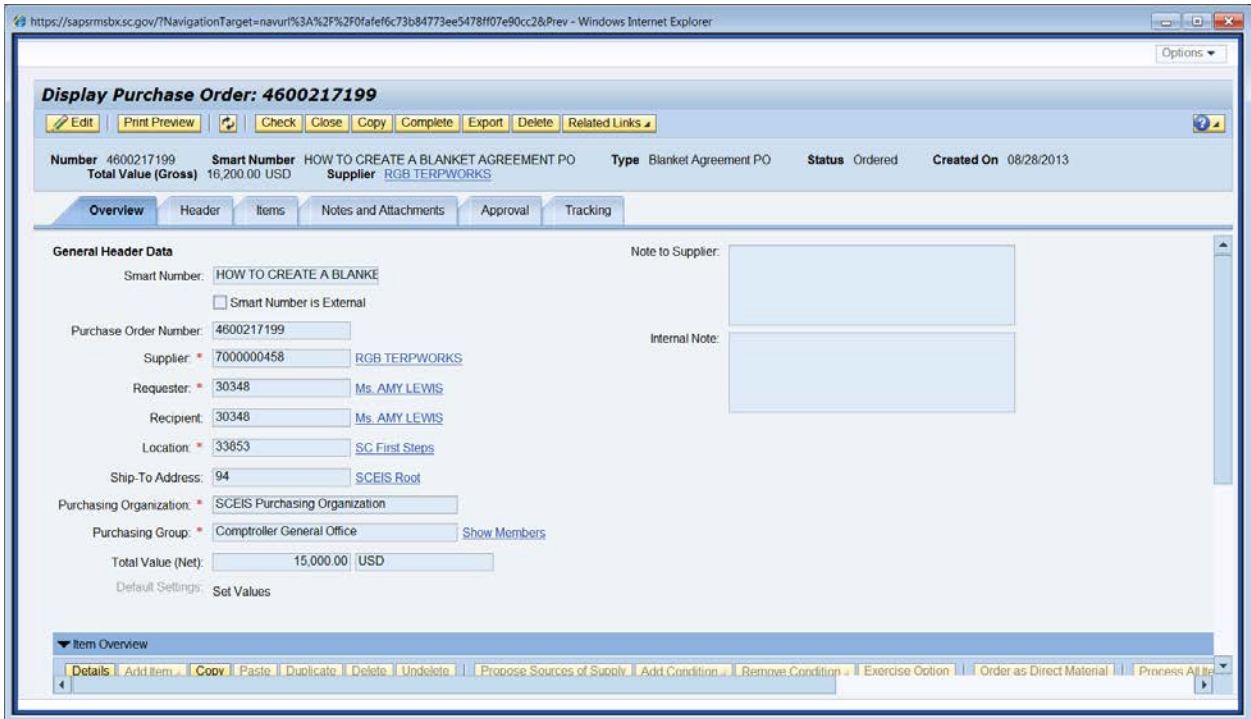
General Data Notes and Attachment Output Budget Document Totals Extended PO History Payment User-Specified Status

Start of validity: 08/28/2013 Parked:
 To: 08/27/2015 Cancelled:
 Closeout Status: None
 Selective Release Status:

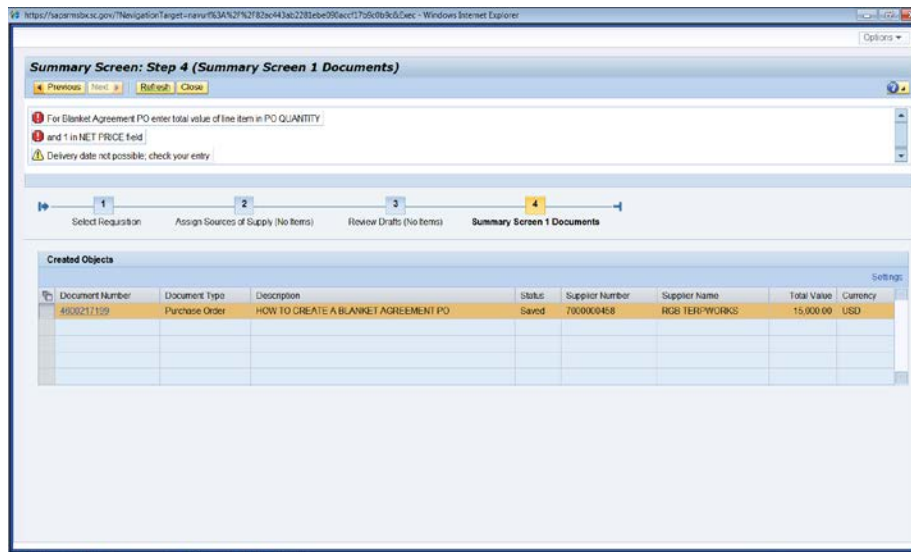
Partner

Function	Number	Name	Phone Number
Requester	30348	AMY LEWIS	
Vendor	7000000458	RGB TERPWORKS	(803) 837-8157
Service Agent			
Goods Recipient	30348	AMY LEWIS	
Ship-To Address	94	SCEIS Root	(803) 734-5011
Location	33853	SC First Steps	

17. Click Close to close the Purchase Order window.



18. Click Close to close the Sourcing window.



Blanket PO Created: _____