

## **Exercise 2**

### **Create a Blanket Agreement Purchase Order**

## Exercise 2: Create a ZBPO Blanket Agreement 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** (Using the 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

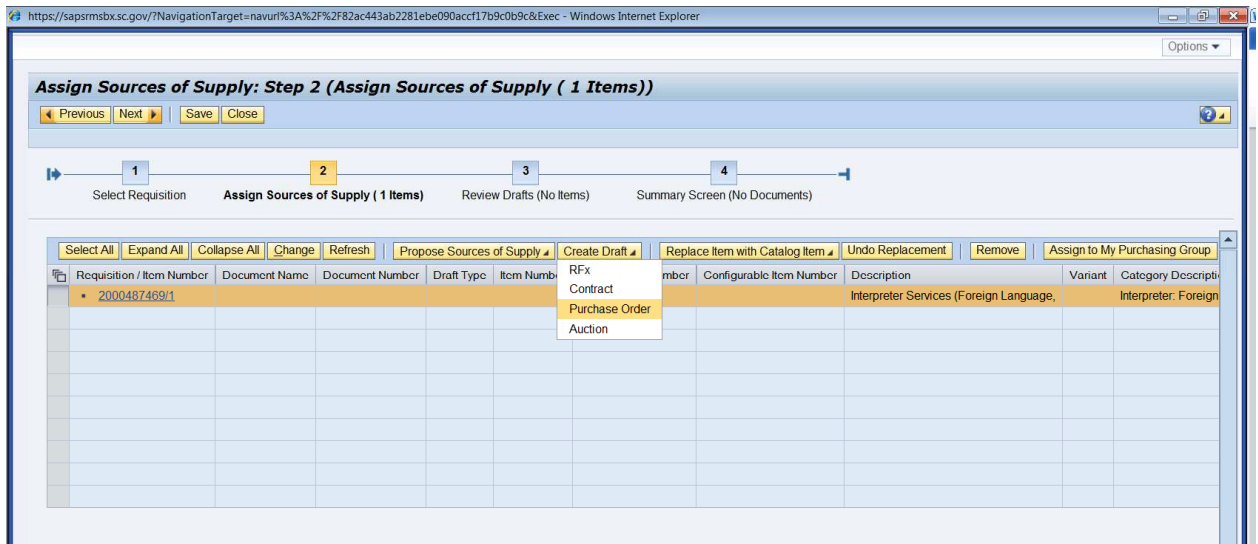
Progress: 1 Select Requisition | 2 Assign Sources of Supply (No Items) | 3 Review Drafts (No Items) | 4 Summary Screen (No Documents)

Requester: [Field] External Requirement: [Field]  
 Purchasing Organization: [Field] Account Assignment Category: [Dropdown]  
 Purchasing Group: [Field] Account Assignment Number: [Field]  
 Priority: [Dropdown] Intended for Grouping:   
 Delivery Date Range: In 90 Days Include Locked Items:   
 Delivery Date: 08/27/2013 Search for Requisitions [Field]

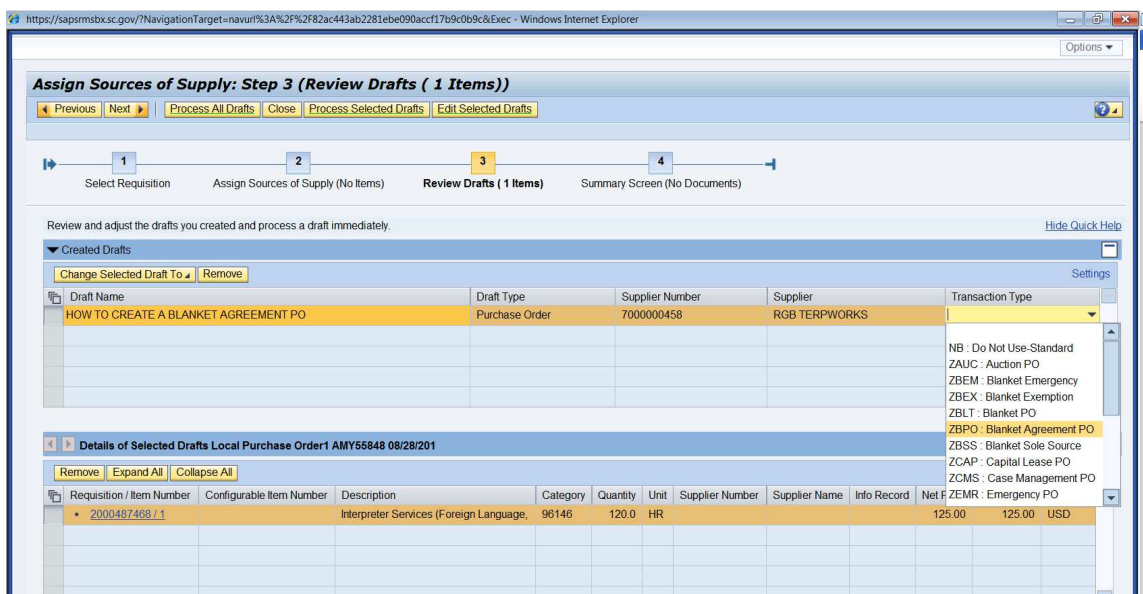
Search

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			
2000487466/1	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			

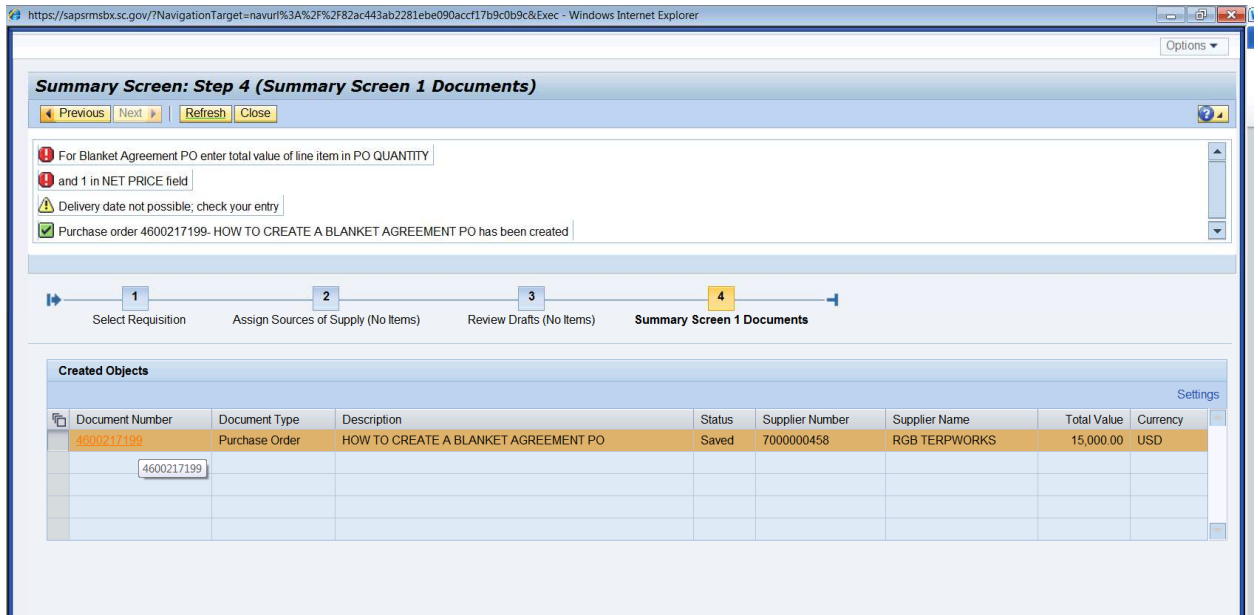
9. Click **Create Draft**. Using the drop-down, select **Purchase Order** (this automatically takes you to step 3).



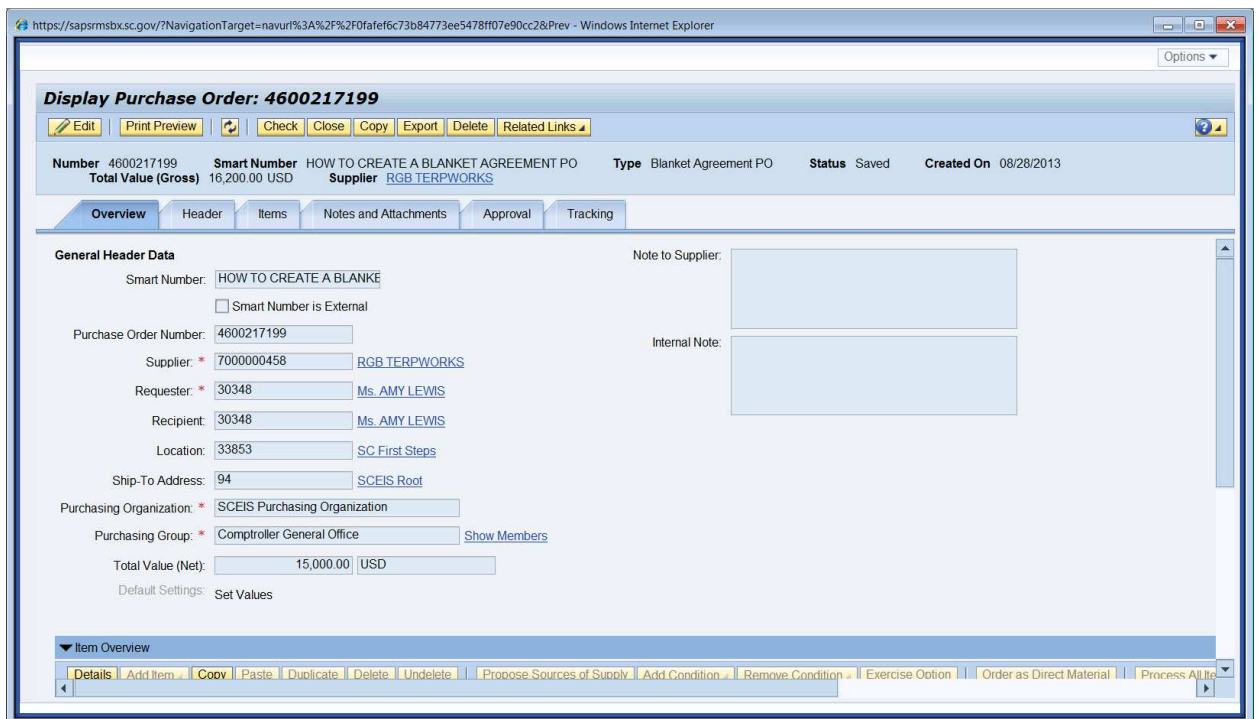
10. In **Draft Name** field, change the name to PR215 PO Exercise 2. In the **Transaction Type** field, use the drop down menu to select **ZBPO Blanket Agreement PO**. Click **Process Selected Drafts**. NOTE: Once the Transaction Type has been selected and ordered it **cannot** be changed. If the PO Transaction Type needs to be changed after creation, the PO must be deleted and a new PO created.



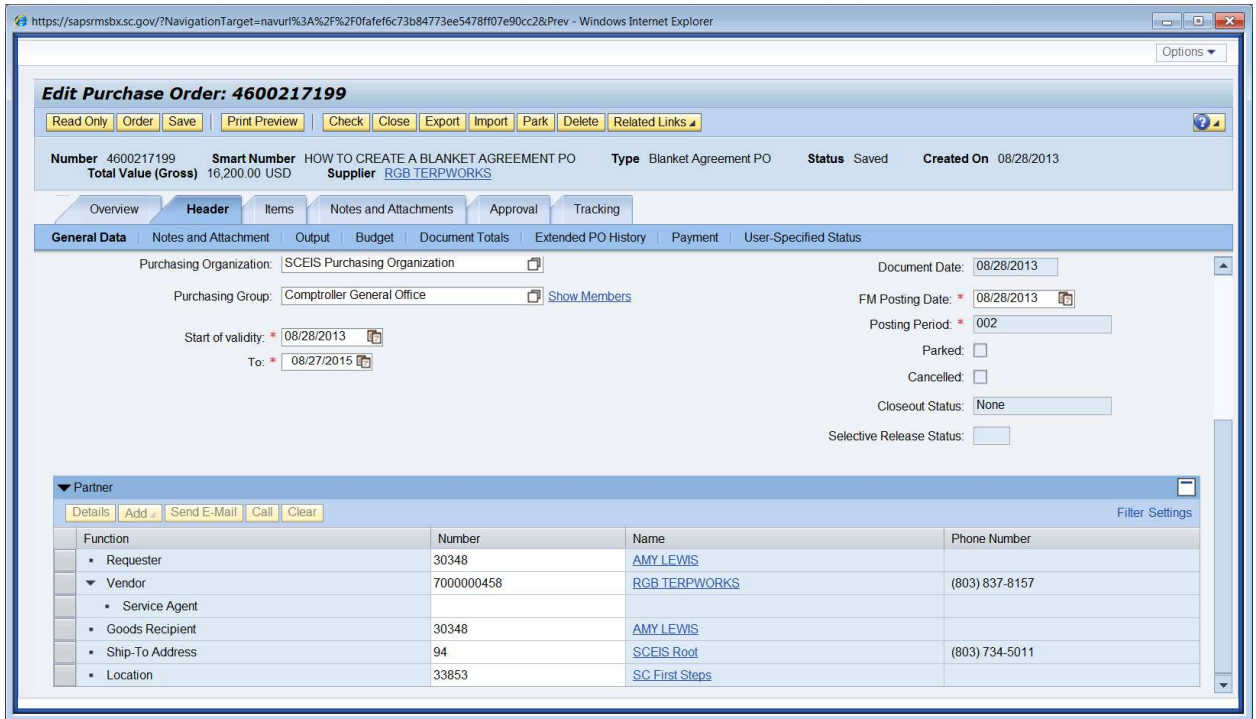
- You will receive two red hard stop errors to remind you to change your quantity and price for all Blanket POs. Click the hyperlink to open the PO in a new window.



- Click **Edit**.



13. Click on **Header** tab, enter today's date in the **Start of validity** field and one year from today's date in the **To** field (normally Blanket POs are created for each fiscal year).



**Edit Purchase Order: 4600217199**

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

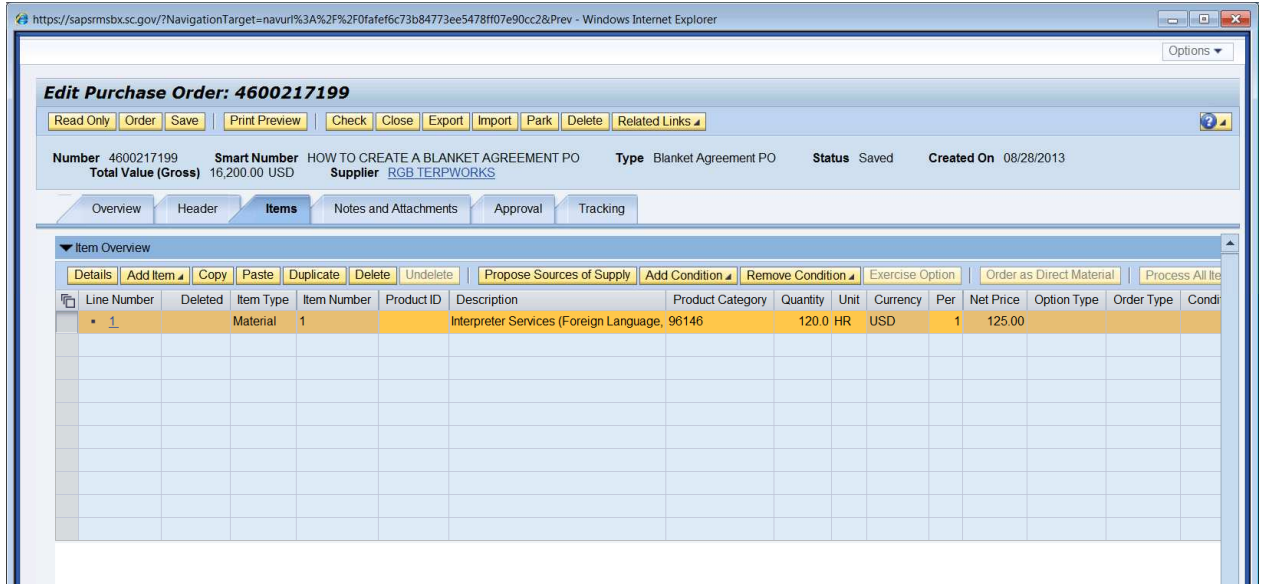
General Data | Notes and Attachment | Output | Budget | Document Totals | Extended PO History | Payment | User-Specified Status

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	

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



15. 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 tax has been included in the total dollar value of the PO change your **Tax Code/Amount** from **AP Sales Tax** to **Tax Exempt**.

https://sapsrmbxsc.gov/?NavigationTarget=navurl%3A%2F%2F0fafef6c73b84773ee5478f07e90cc2&Prev - Windows Internet Explorer

**Edit Purchase Order: 4600217199**

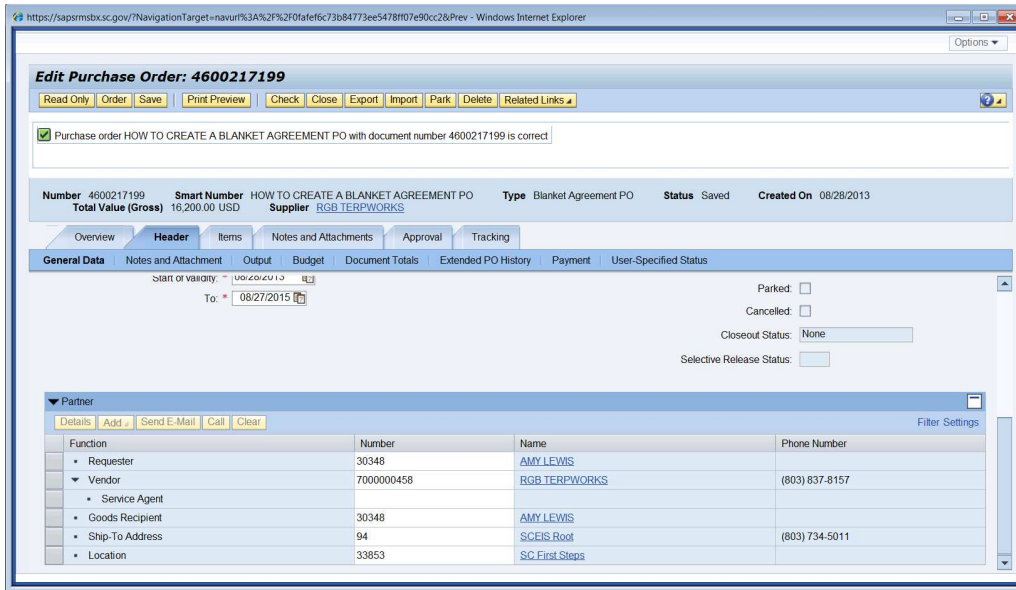
Read Only | Order | Save | Print Preview | Check | Close | Export | Import | Park | Delete | Related Links

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

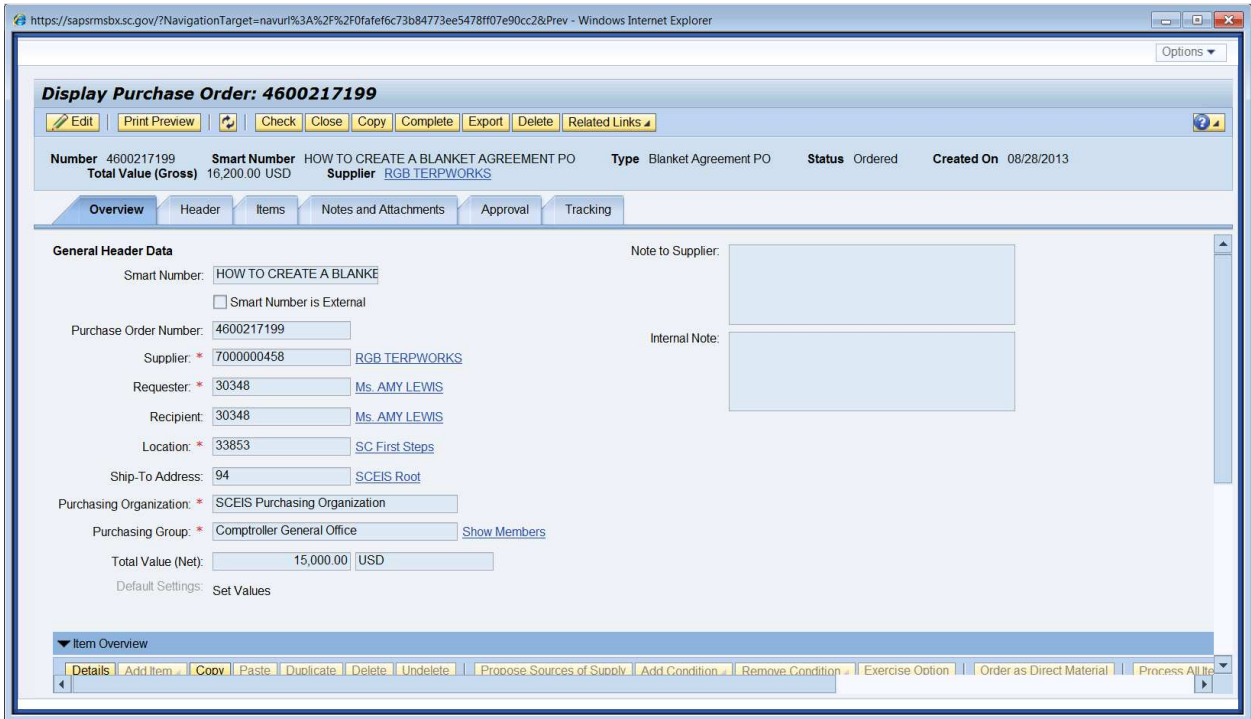
Item Number: 1 Quantity / Unit: 15000.00 HR ( 0 ) HR  
 Item Type: Material Gross Price / Per: 1.00 USD 1 HR  
 Description: Interpreter Services (Foreign Language, Net Value: 15,000.00 USD  
 Product Category: 96146 Interpreter: Foreign Language Hearing Impaired etc Net Price: 125.00 USD  
 Catalog: Guaranteed Purch. Value: 0.00  
 Contract / Item: 0  
 Complete Item on Saving: No  
 Not to Exceed Price:   
 Not Separately Priced:   
 Incremental Funding Active:   
 Tax Code / Amount: I1:A/P Sales Tax  
**Service and Delivery**  
 Delivery Date: 08/27/2013  
 Tolerance Group:   
 Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 %  Unlimited  
 Storage Location:   
 Acceptance at Origin:   
**Status and Statistics**  
 Item Deleted: No

**16.** After all updates are complete, click **Check**. If the document had any errors, these would appear after you click the Check button. Notice the **Status** of the PO. The Status of the PO is very important in SRM7.2. In SRM 7.2, **Order** "saves" and "orders" the document. Select **Order**, and then click **Refresh**. Status changes from **Awaiting Approval** to **Ordered**.

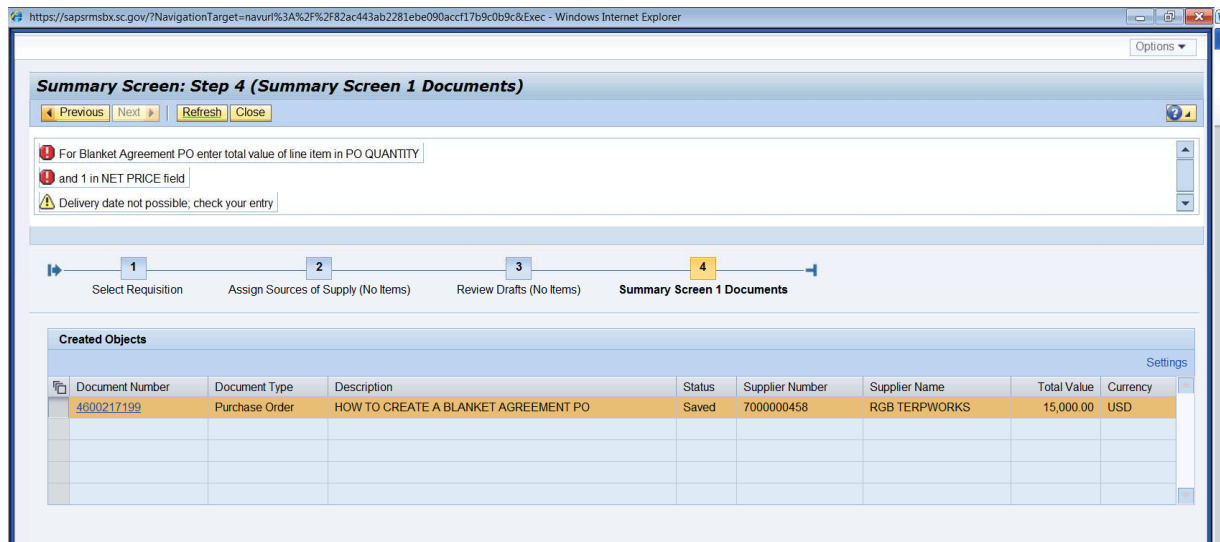


**17.** Click **Close** to close the Purchase Order window.





18. Click **Close** to close the Sourcing window.



**Blanket Purchase Agreement PO Created:** \_\_\_\_\_