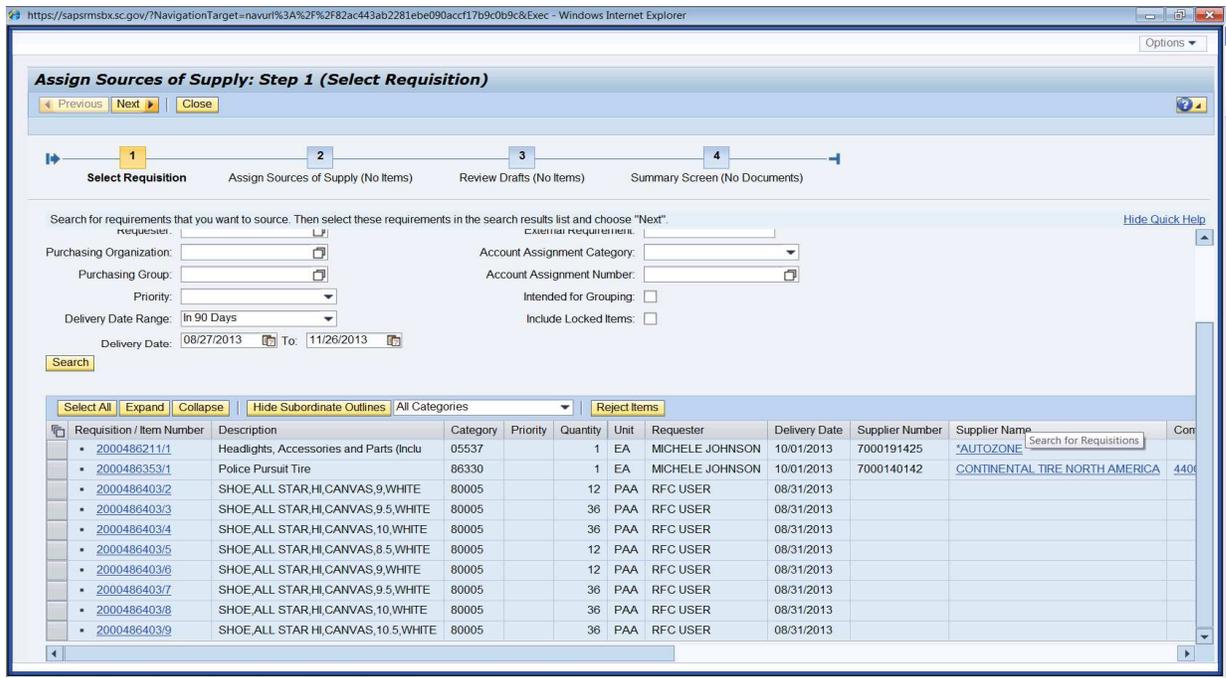# Exercise 3

Create a Blanket Purchase Order

## Exercise 3: Create a ZLBT Blanket PO

1. Log on to **SRM**.

2. Click **Purchasing** folder across the top of the screen.

3. Click **Purchasing** in the blue menu bar in the left-hand side.

4. Scroll to the bottom on the blue menu bar (Navigation Pane), click **Perform Sourcing**.

5. Use the 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.
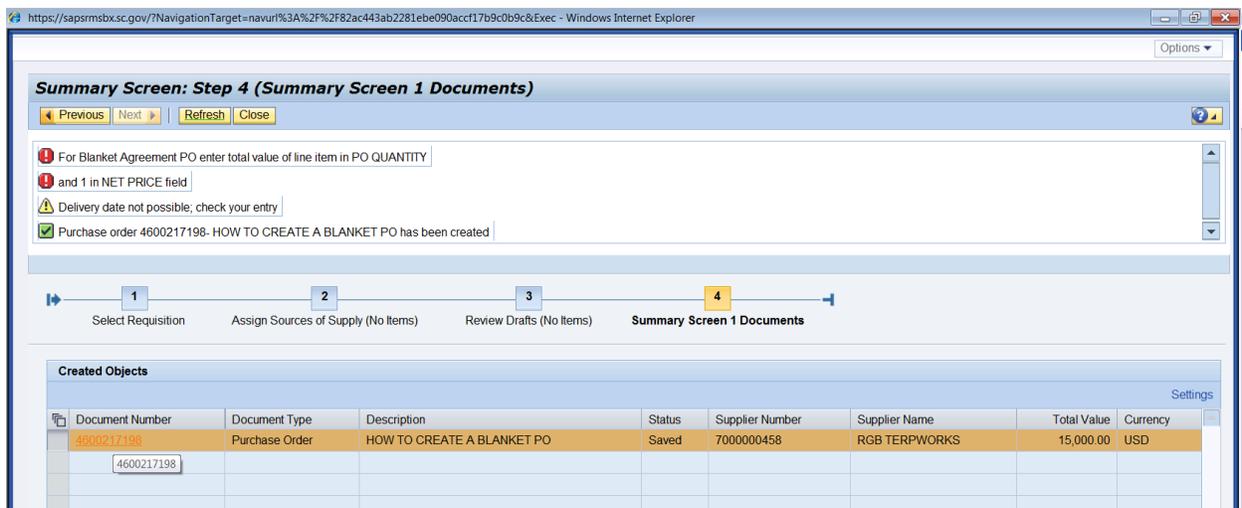
8. Click **Next**.

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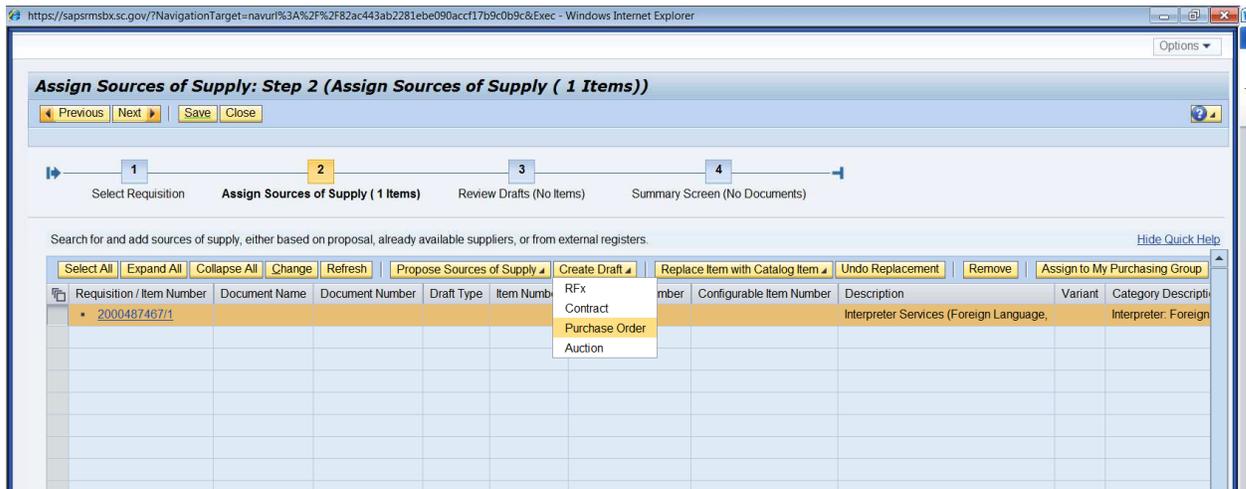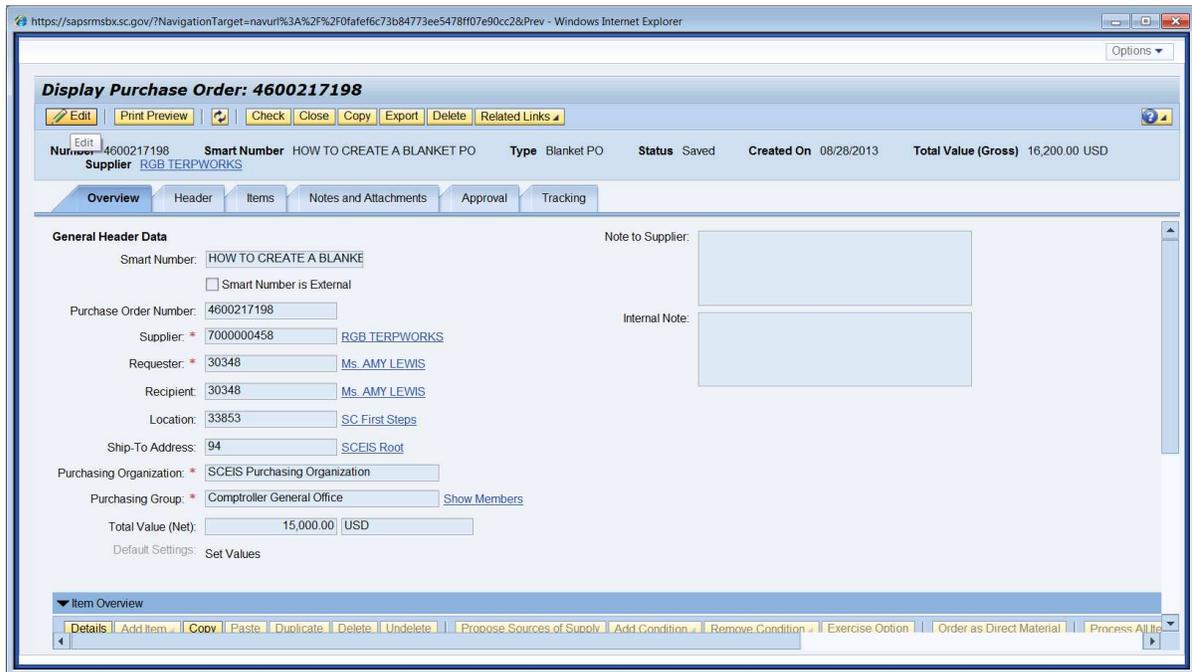

10. In **Draft Name** field, change the name to PR215 PO Exercise 3. In the **Transaction Type** field, use the drop-down menu to select **ZLBT Blanket PO**. Click **Process Selected Drafts**. NOTE: Once the Transaction Type has been selected and ordered it <u>cannot</u> be changed. If the PO Transaction Type needs to be changed after creation, the PO must be deleted and a new PO created.
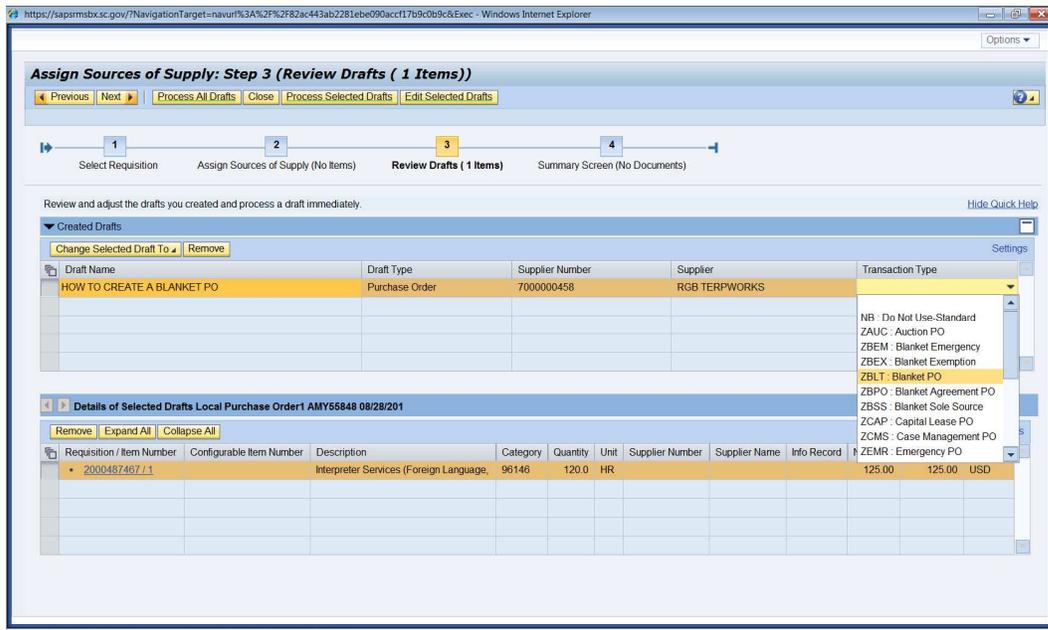
11. You will receive two red hard stop errors to remind you to change your quantity and price for all Blanket POs. Click the hyperlink to open the PO in a new window.

12. Click **Edit**.

13. Click **Item**s 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 the **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). Click **Save**, remember in order to access Document Builder the PO must be in a **Saved** Status.
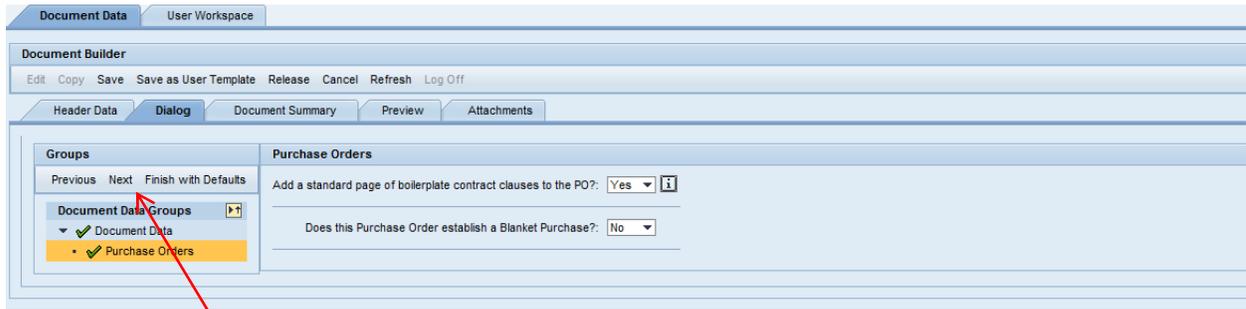
16. Click **Related Links** from the drop-down menu select **Document Builder**.
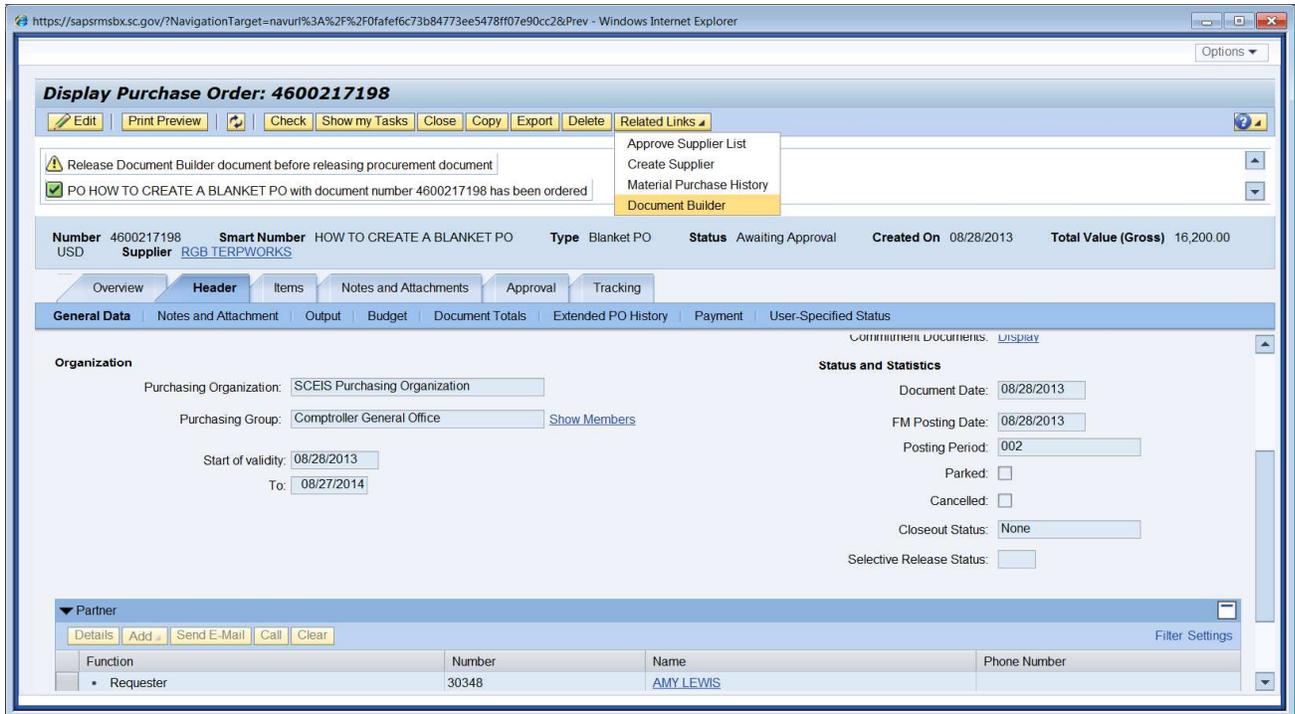

17. The following screen will display.
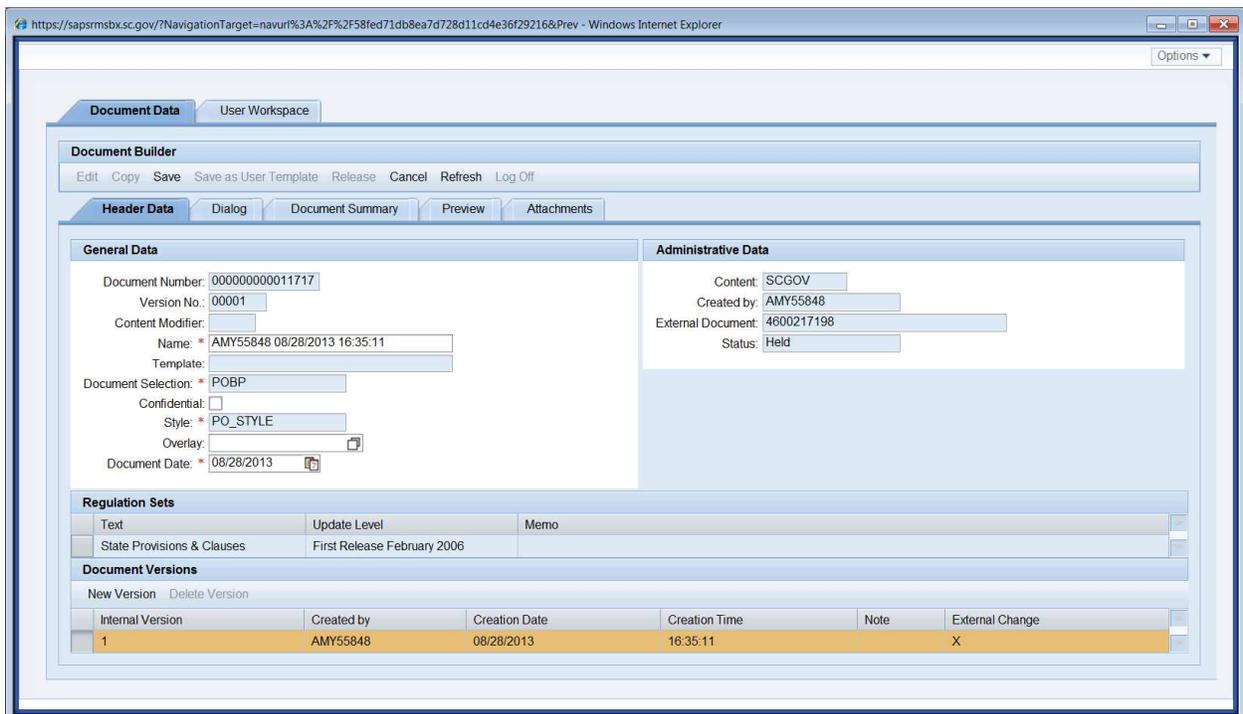
18. Click **Dialog** tab, answer **Yes** and **No** to the questions. **Yes** to the first question will produce Standard Purchase Order clauses. **Yes** to the second question will produce Blanket Agreement Purchase Order Clauses. The answer to question one is always **Yes**.
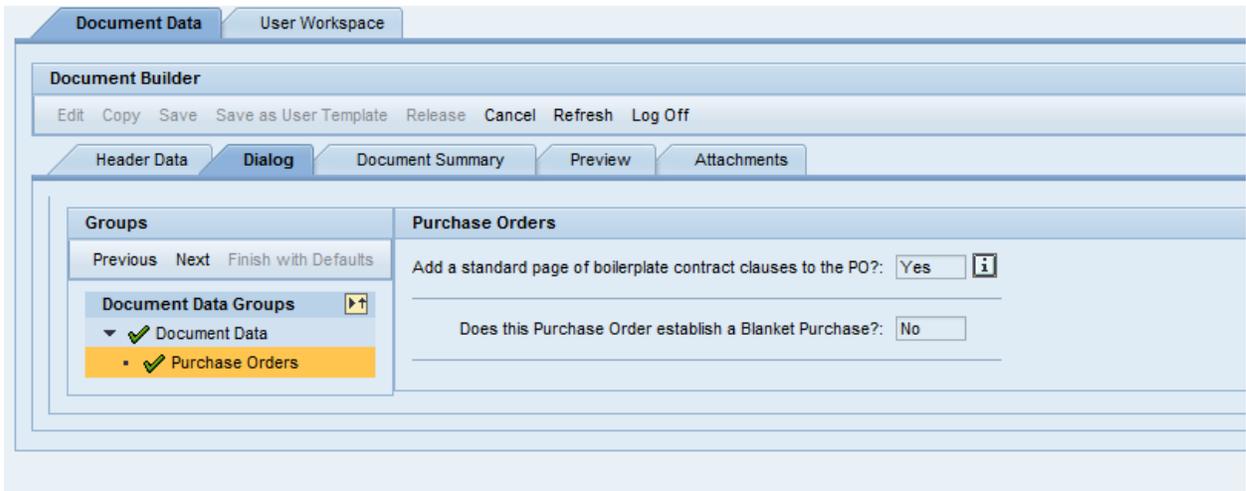

19. After you answer the questions for the appropriate Transaction Type's Purchase Order, then, select **Next** within the Dialog box.

20. Then Click **Release**
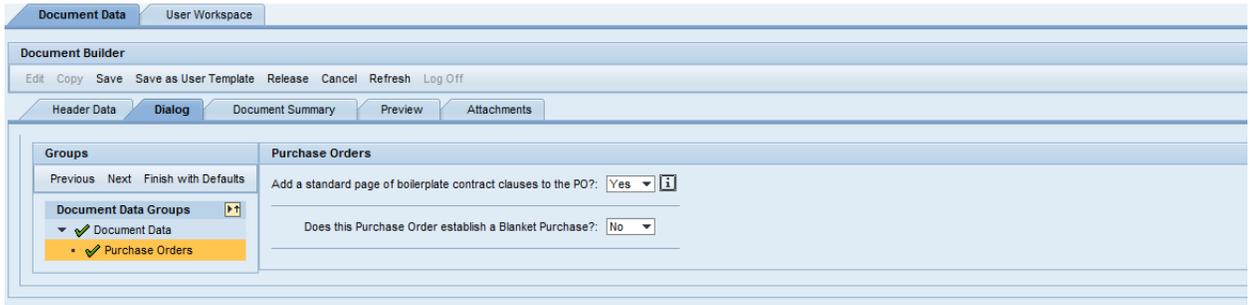
21. Click **Log Off**.

22. Click **Yes**.
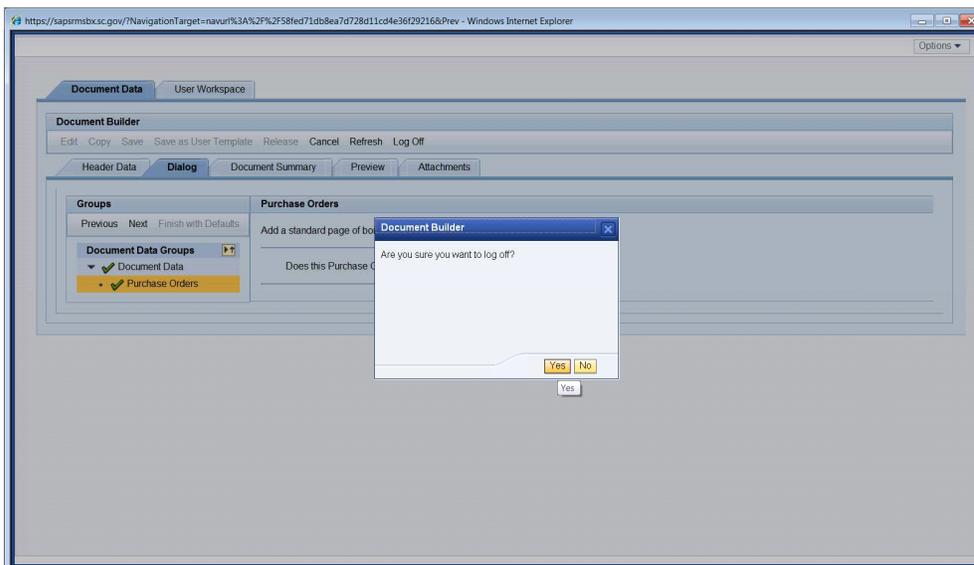
23. Click the **Refresh** icon to get the latest version of the PO. The document you just created will be located in **Notes and Attachments** tab under the Description of "**DocB: Document**". You can click the **DocB: Document** link to display the document.

24. Remember the PO is in a "Saved" status so remember to click the "Edit" button.

25. Then click **Order**, because you want the PO to end up in an **Ordered** status. The system will indicate the Status is "Awaiting Approval", but just click the **Refresh** icon.

26. After you click the **Refresh** icon, the system will display the PO is in an **Ordered** status, then click **Close**.

Blanket PO Created: _____