

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.

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

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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.



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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.

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12. Click Edit.

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

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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**.

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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.

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16. Click **Related Links** from the drop-down menu select **Document Builder**.

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PO HOW TO CREATE A BLANKET PO with document number 4600217198 ha	is been ordered	Material Purchase History			-
		Document Builder			
Number 4600217198 Smart Number HOW TO CREATE A BLANKET P USD Supplier RGB TERPWORKS	O Type Blan	nket PO Status Awaitin	ng Approval Created On 08/28/2	2013 Total Value (Gross)	16,200.00
Overview Header Items Notes and Attachments	Approval Tra	cking			
General Data Notes and Attachment Output Budget Document T	otals Extended F	PO History Payment U	Jser-Specified Status	C I HEPHER	
Organization			Communent Documents	. <u>Display</u>	-
Purchasing Organization: SCEIS Purchasing Organization			Status and Statistics	00/20/2012	
			Document Date	00/20/2013	
Purchasing Group: Comptroller General Office	Show Mem	bers	FM Posting Date	08/28/2013	
Start of validity: 08/28/2013			Posting Period	002	
To: 08/27/2014			Parked	:	
			Cancelled	:	
			Closeout Status	None	
			Selective Release Status	c 🔲	
▼ Partner					Ξ
Details Add Send E-Mail Call Clear				Fit	er Settings
Function Number		Name	1	Phone Number	
Requester 30348		AMY LEWIS			

17. The following screen will display.

Document Data User Wo	rkspace							
Document Builder								
Edit Copy Save Save as User	Template Release Cancel	Refresh Lo	ig Off					
Header Data Dialog	Document Summary	Preview	Attachments					
General Data				Administrative Da	ta			
Document Number: 00000000	0011717			Content:	SCGOV			
Version No.: 00001				Created by:	AMY55848			
Content Modifier:				External Document:	4600217198			
Name: * AMY5584	3 08/28/2013 16:35:11			Status:	Held			
Template:								
Document Selection: * POBP								
Confidential:								
Style: * PO_STYL	E							
Overlay:								
Document Date: * 08/28/201	3 17							
Regulation Sets								
Text	Update Level		Memo					
State Provisions & Clauses	First Release February 2	2006						
Document Versions								
New Version Delete Version								
Internal Version	Created by	Creati	on Date	Creation Time		Note	External Change	
1	AMY55848	08/28	2013	16:35:11			Х	



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**.

Document Data User Workspace	
Document Builder	
Edit Copy Save Save as User Template	Release Cancel Refresh Log Off
Header Data Dialog Docu	ment Summary Preview Attachments
Groups	Purchase Orders
Previous Next Finish with Defaults	Add a standard page of boilerplate contract clauses to the PO?: Yes 💌 🚺
Document Data Groups	
👻 🖌 Document Data	Does this Purchase Order establish a Blanket Purchase?: No 💌
 Purchase Orders 	

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

Document Data User Workspace	
Document Builder	
Edit Copy Save Save as User Template	Release Cancel Refresh Log Off
Header Data Dialog Docu	ment Summary Preview Attachments
Groups	Purchase Orders
Previous Next Finish with Defaults	Add a standard page of boilerplate contract clauses to the PO?: Yes 💌 🚺
Document Data Groups ▶↑ ✓ If Document Data ✓ ✓ Purchase Orders ✓	Does this Purchase Order establish a Blanket Purchase?: No

21.Click Log Off.

Document Builder	
Edit Copy Save Save as User Template	e Release Cancel Refresh LogOff
Header Data Dialog Doo	cument Summary Preview Attachments
Groups	Purchase Orders
Previous Next Finish with Defaults	Add a standard page of boilerplate contract clauses to the PO?: Yes
Document Data Groups	
👻 🖌 Document Data	Does this Purchase Order establish a Blanket Purchase?: No
 V Purchase Orders 	

22. Click Yes.

Document Builder Edit Copy Save Save as User T	implate Release Cancel Refresh Log Off	
Header Data Dialog	Document Summary Preview Attachments	
Groups	Purchase Orders	
Document Data Groups	Poes this Purchase C Are you sure you want to log of?	



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 "<u>DocB: Document</u>". You can click the <u>DocB: Document</u> link to display the document.

piay Purchase Or	der										
Edit Print Preview	Check Close Cop	y Export System Information Create M	lemory Snapshot Related Links 🖌								Ø
rchase Order Number 4	600287335 Purchase (Order Type Blanket PO Status Save	ed Document Date 10/30/2013 To	otal Value (Gross) 2	00.00 USD <mark>s</mark> r	nart Number					
Overview Header	items liotes a	nd Attachments Approval Trac	king								
r Notes		i ka sa	N.								Ξ
Add a Clear											Filter Settings
			12102 11								
Assigned To	Category		Text Preview								
Assigned To Item01"Auto Radial Tire"	Category <u>Vendor Text</u>		Text Preview Call prior to delivery								
Assigned To Item01"Auto Radial Tire"	Category <u>Vendor Text</u>		Text Preview Call prior to delivery								
Assigned To Itemü 1'Auto Radial Tire [®] Attachments	Category <u>Vendor Text</u>		Text Preview Call prior to delivery								
Assigned To Item01*Auto Radial Tire* • Attachments Add Attachment Edit Dec	Category <u>Vendor Text</u> scription Versioning	ele Creale Qualification Profile	Text Preview Call prior to delivery								Filter Settings
Assigned To temD1*Auto Radial Tire* Attachments Add Attachment Edit Dec Assigned To	Category <u>Vendor Text</u> scription Versioning - Del Category	He Create Qualification Profile Description	Text Preview Call prior to delivery File Name	Version	Processor	Visible Internality only	Checked Out	Туре	Size (KB)	Changed by	Filter Settings Changed on
Assigned To Rem01*Auto Radial Tre* Attachments Add Attachment Edit Det Assigned To Document Header	Vendor Text Versioning / Dek Category Legal Document	ele Create Qualification Profile Description Elicitino Schedule	Text Preview Call prior to delivery File Name Bidding Schedule	Version 1	Processor	Visible Internally only	Checked Out	Type	Size (KB) 1	Changed by FPEPER	Filter Settings Changed on 10/30/2013
Assigned To temD1*Auto Radial Tre* Attachments Add Attachment Assigned To Document Header Document Header	Verdor Text Versoning Category Versoning Category Legal Document Legal Document	He Create Qualification Profile Description Eldding Schedule Doct9 Responses Report	Text Preview Call prior to delivery Call prior to delivery File Name Bidding Schedule DocB Responses Report	Version 1 1	Processor	Visible Internally only	Checked Out	Type htm htm	Size (KB) 1 38	Changed by FREPER FREPER	Filer Settings Changed on 10/30/2013 10/30/2013
Assigned To Rem01*Auto Radial Tire* Attachments Add Attachment Edit Dei Assigned To Document Header Document Header Document Header	Category Vendor.Text Verscning / Dekt Category Category Legal Document Legal Document Legal Document	te Create Qualification Profile Description Diction Schedule Doct Responses Report Doct Responses Report Doct Reviewers Check List	Text Preview Call prior to delivery Call prior to delivery File Name Bidding Schedule DocB Responses Report DocB Reviewers Check List	Version 1 1 1	Processor	Visible Internality only	Checked Out	Type htm htm	Size (KB) 1 38 2	Changed by FPEPER FPEPER FPEPER	Filter Settings Changed on 10/30/2013 10/30/2013 10/30/2013 10/30/2013



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

_											[]
Dis <mark>pl</mark> ay Purchase Or	der										
/ Edt Print Preview	Check Close Cop	py Export System Information Create M	emory Snapshot Related Links 🖌								0.
Purchase Order Number 4	600287335 Purchase	Order Type Blanket PO Status Save	Document Date 10/30/2013 To	otal Value (Gross) 2	00.00 USD Sr	nart Number					
Overview Header	tems Notes a	ind Attachments Approval Trac	king								
▼ Notes											-
Add J Clear											Filter Settings
Assigned To	Category		Text Preview								
item01"Auto Radial Tire"	Vendor Text		Call prior to delivery								
 Attachments 											٦
Add Attachment Edit Des	scription Versioning a Del	lete Create Qualification Profile									Filter Settings
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Туре	Size (KB)	Changed by	Changed on
Document Header	Legal Document	Bidding Schedule	Bidding Schedule	1				htm	1	FPIEPER	10/30/2013
Document Header	Legal Document	DocB:Responses Report	DocB:Responses Report	1				htm	38	FPIEPER	10/30/2013
Document Header	Legal Document	DocB:Reviewers Check List	DocB:Reviewers Check List	1				htm	2	FPIEPER	10/30/2013
Document Header	Legal Document	Doc8:Document	DocB:Document	1			Π	pdf	13	FPIEPER	10/30/2013



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.

				/						
Display Purchase Or	der									
PO PR 215 EXCERCISE 3 BL	ANKET with document numb	row my Tasks Copy Export System h er 4600287382 has been ordered	formation Create Memory Bnapshot Rela	ted Links 4						
Purchase Order Number 4 Overview Header	800287382 Purchase Items Notes	Order Type Blanket PO Status A and Attachments Approval Ti	waiting Approval Document Date 10/ acking	30/2013 Total	Value (Gross) 2	500.00 USD Smart Numt	er Supplier <u>CO</u>	NTINENTAL TI	<u>re north Amer</u> i	<u>CA</u>
▼ Notes Add J Clear Assigned To Category			Text Preview.							
✓ Attachments Add Attachment Edt Des	cription Versioning 4 De	elete Create Qualification Profile								
Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Туре	Size (KB)	C
Document Header	Legal Document	Bidding Schedule	Bidding Schedule	1	_			htm	1	F
Document Header	Legal Document	DocB:Responses Report	DocB:Responses Report	1	_			htm	38	F
Document Header	Legal Document	DocB:Reviewers Check List	DocB:Reviewers Check List	1				htm	2	F
Document Header	Legal Document	DocB:Document	DocB:Document	4				pdf	13	F



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

AMERILA
Size (KB)
1
38
2
13

Blanket PO Created: _____