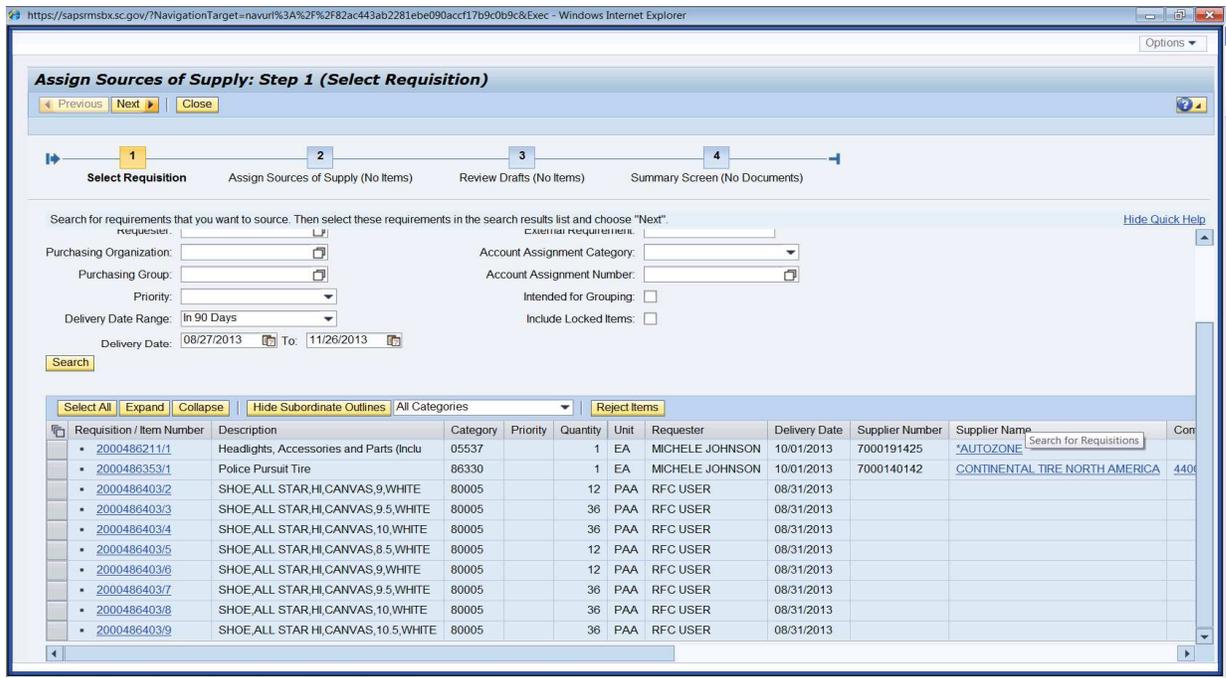


## **Exercise 3**

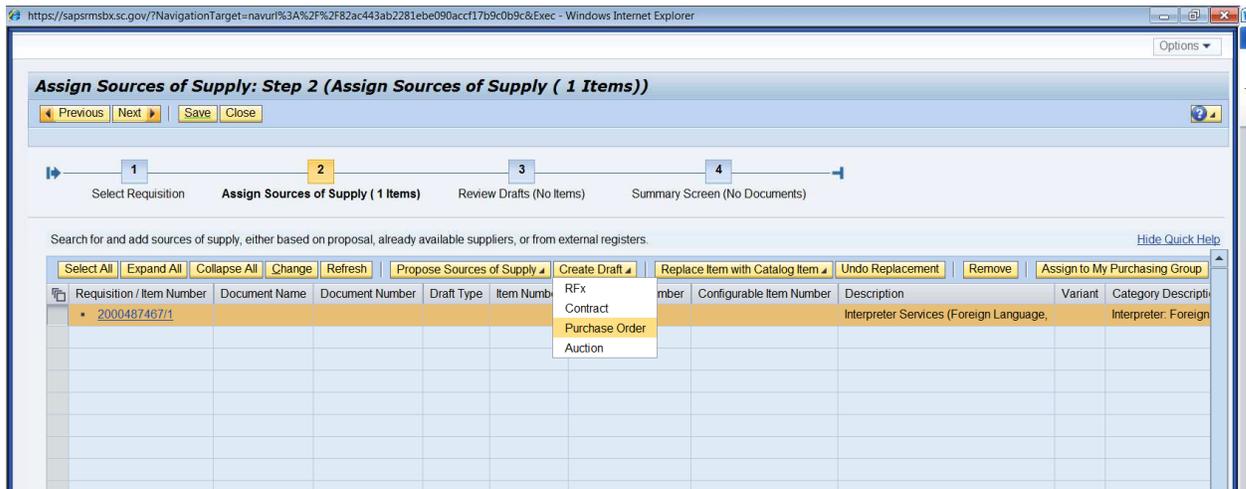
# **Create a Blanket Purchase Order**

### **Exercise 3: Create a ZLBT Blanket PO**

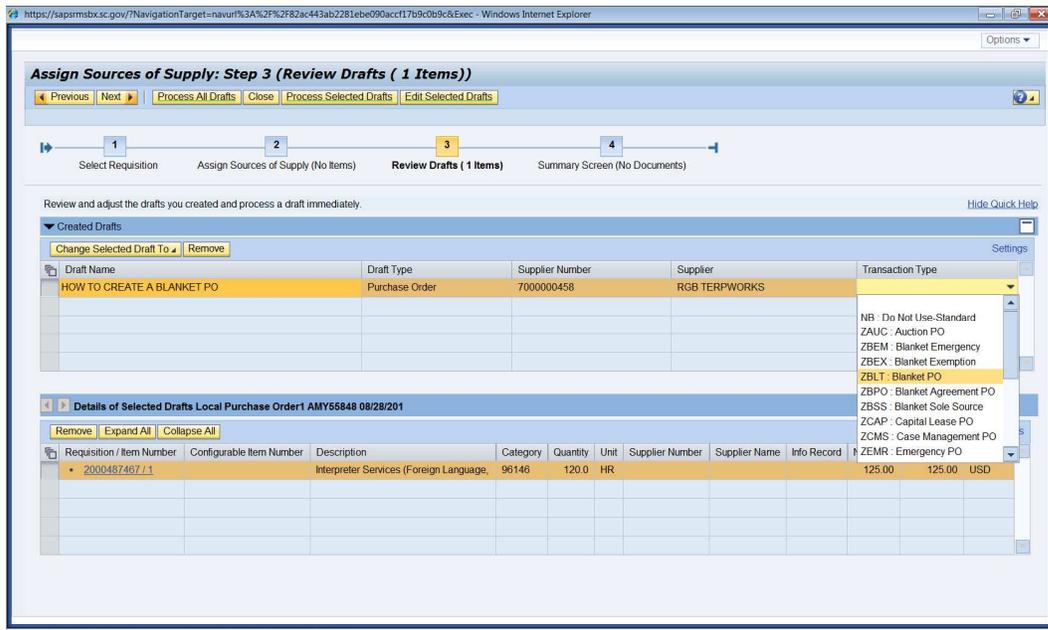
1. Log on to **SRM**.
2. Click **Purchasing** folder across the top of the screen.
3. Click **Purchasing** in the blue menu bar in the left-hand side.
4. Scroll to the bottom on the blue menu bar (Navigation Pane), click **Perform Sourcing**.
5. Use the drop-down menu of the Delivery Date Range field 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**.



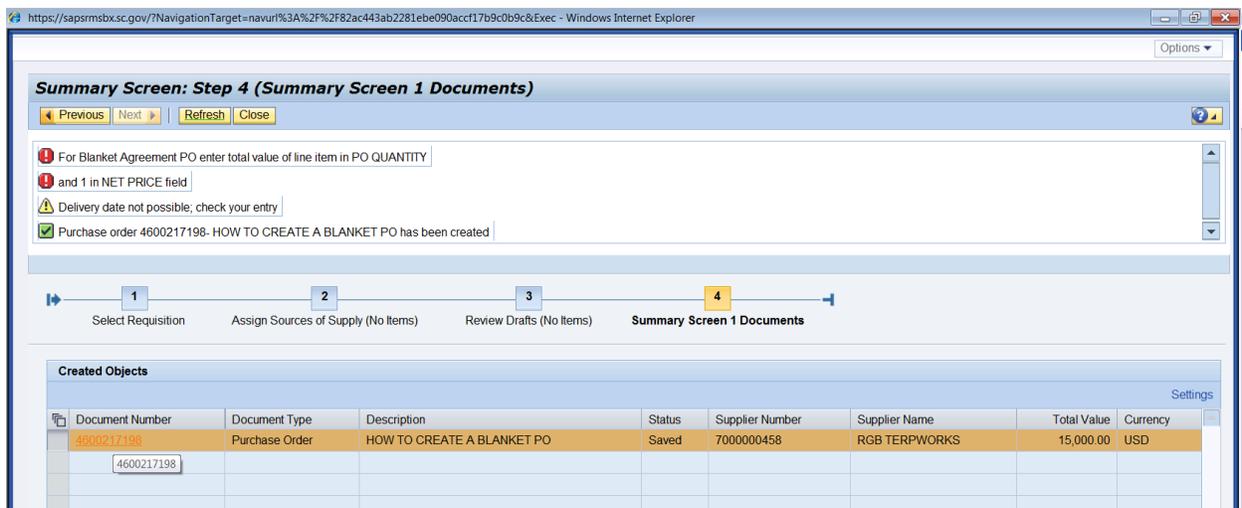
- Click **Create Draft**. Using the drop-down, select **Purchase Order** (this automatically takes you to Step 3).



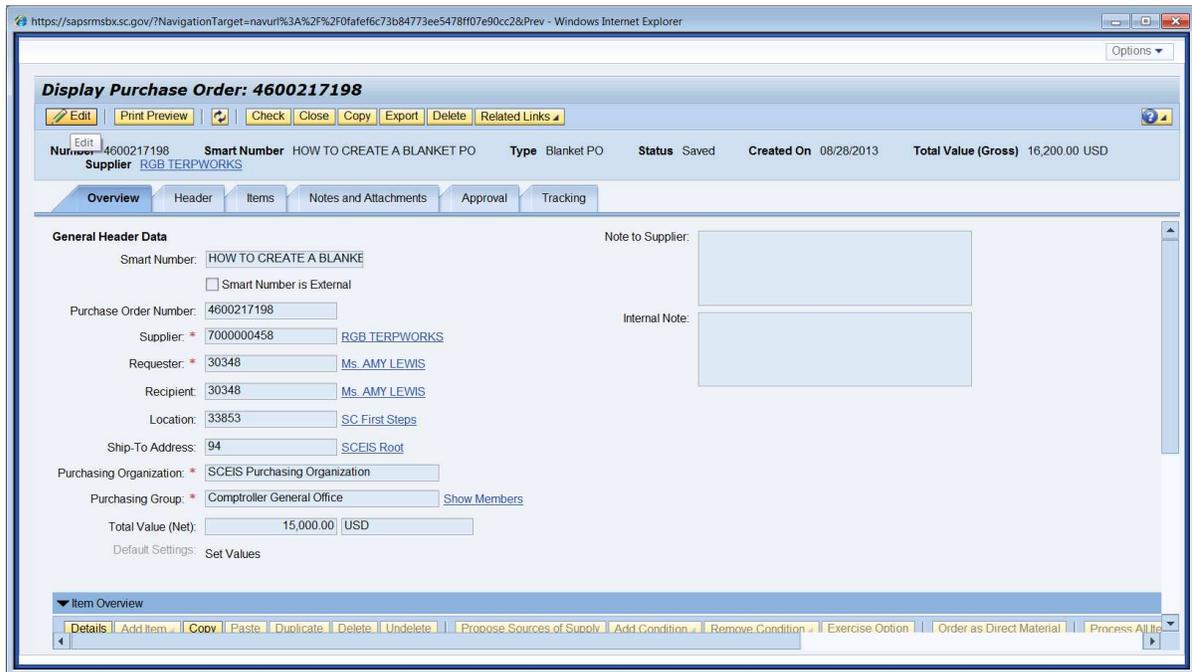
- In **Draft Name** field, change the name to PR215 PO Exercise 3. In the **Transaction Type** field, use the drop-down menu to select **ZLBT Blanket PO**. Click **Process Selected Drafts**. NOTE: Once the Transaction Type has been selected and ordered it cannot be changed. If the PO Transaction Type 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**.



**Display Purchase Order: 4600217198**

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

**Number:** 4600217198    **Smart Number:** HOW TO CREATE A BLANKET PO    **Type:** Blanket 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 Header Data**

**Smart Number:** HOW TO CREATE A BLANKET PO  
 Smart Number is External

**Purchase Order Number:** 4600217198

**Supplier:** \* 7000000458 RGB TERPWORKS

**Requester:** \* 30348 Ms. AMY LEWIS

**Recipient:** 30348 Ms. AMY LEWIS

**Location:** 33853 SC First Steps

**Ship-To Address:** 94 SCEIS Root

**Purchasing Organization:** \* SCEIS Purchasing Organization

**Purchasing Group:** \* Comptroller General Office [Show Members](#)

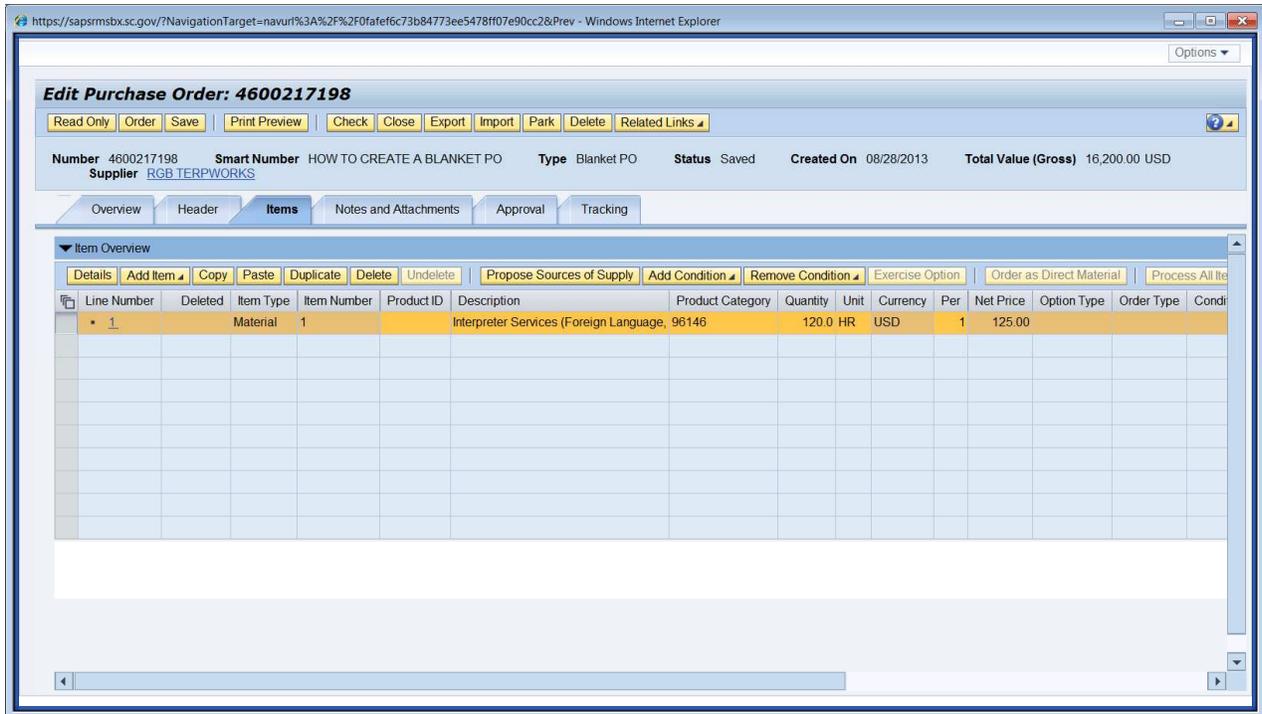
**Total Value (Net):** 15,000.00 USD

Default Settings: [Set Values](#)

**Note to Supplier:** [Text Area]  
**Internal Note:** [Text Area]

**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](#)

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



**Edit Purchase Order: 4600217198**

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

Number 4600217198 Smart Number HOW TO CREATE A BLANKET PO Type Blanket PO Status Saved Created On 08/28/2013 Total Value (Gross) 16,200.00 USD  
Supplier RGB TERPWORKS

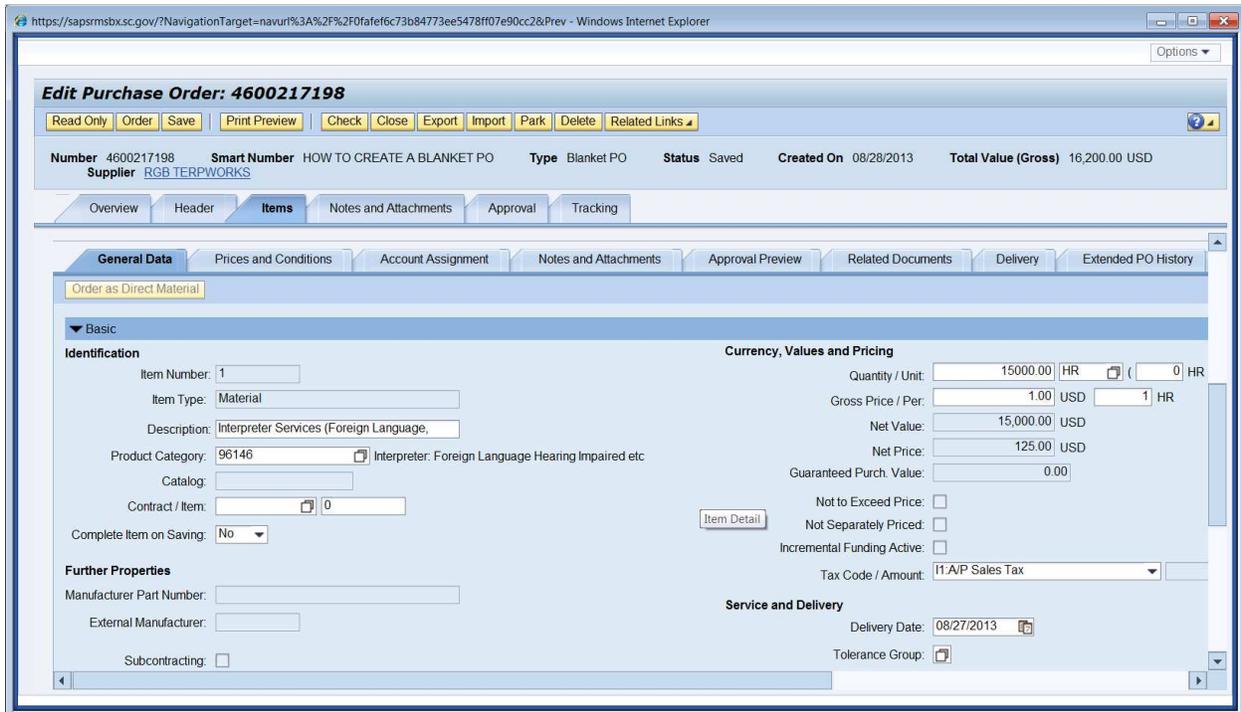
Overview | Header | **Items** | Notes and Attachments | Approval | Tracking

Item 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	Condi
1		Material	1		Interpreter Services (Foreign Language, 96146		120.0	HR	USD	1	125.00			

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**.



**Edit Purchase Order: 4600217198**

Number 4600217198    Smart Number HOW TO CREATE A BLANKET PO    Type Blanket 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    Prices and Conditions    Account Assignment    Notes and Attachments    Approval Preview    Related Documents    Delivery    Extended PO History

Order as Direct Material

**Basic**

**Identification**

Item Number: 1  
 Item Type: Material  
 Description: Interpreter Services (Foreign Language,  
 Product Category: 96146    Interpreter: Foreign Language Hearing Impaired etc  
 Catalog:  
 Contract / Item: 0  
 Complete Item on Saving: No

**Further Properties**

Manufacturer Part Number:  
 External Manufacturer:  
 Subcontracting:

**Currency, Values and Pricing**

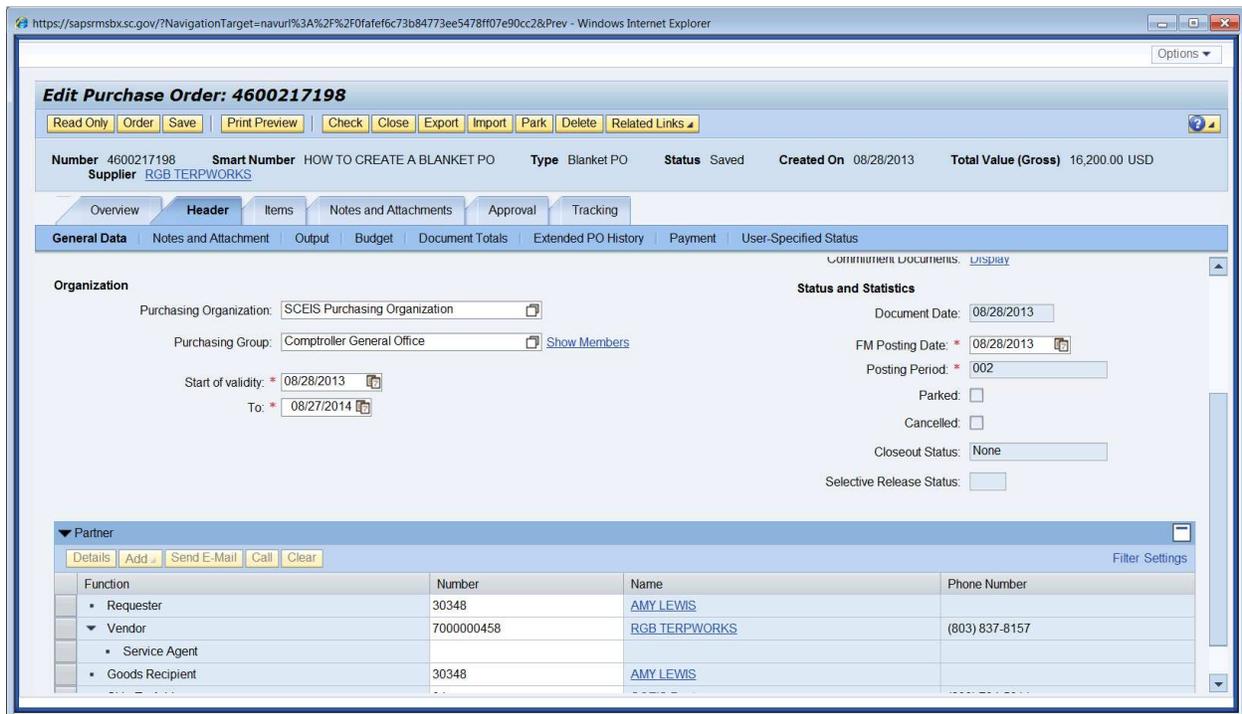
Quantity / Unit: 15000.00 HR  
 Gross Price / Per: 1.00 USD  
 Net Value: 15,000.00 USD  
 Net Price: 125.00 USD  
 Guaranteed Purch. Value: 0.00

Not to Exceed Price:   
 Not Separately Priced:   
 Incremental Funding Active:   
 Tax Code / Amount: 11:AP Sales Tax

**Service and Delivery**

Delivery Date: 08/27/2013  
 Tolerance Group:

- 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.



**Edit Purchase Order: 4600217198**

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

Number: 4600217198    Smart Number: HOW TO CREATE A BLANKET PO    Type: Blanket 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

Commitment Documents: [Display](#)

**Organization**

Purchasing Organization: SCEIS Purchasing Organization  
 Purchasing Group: Comptroller General Office [Show Members](#)  
 Start of validity: \* 08/28/2013  
 To: \* 08/27/2014

**Status and Statistics**

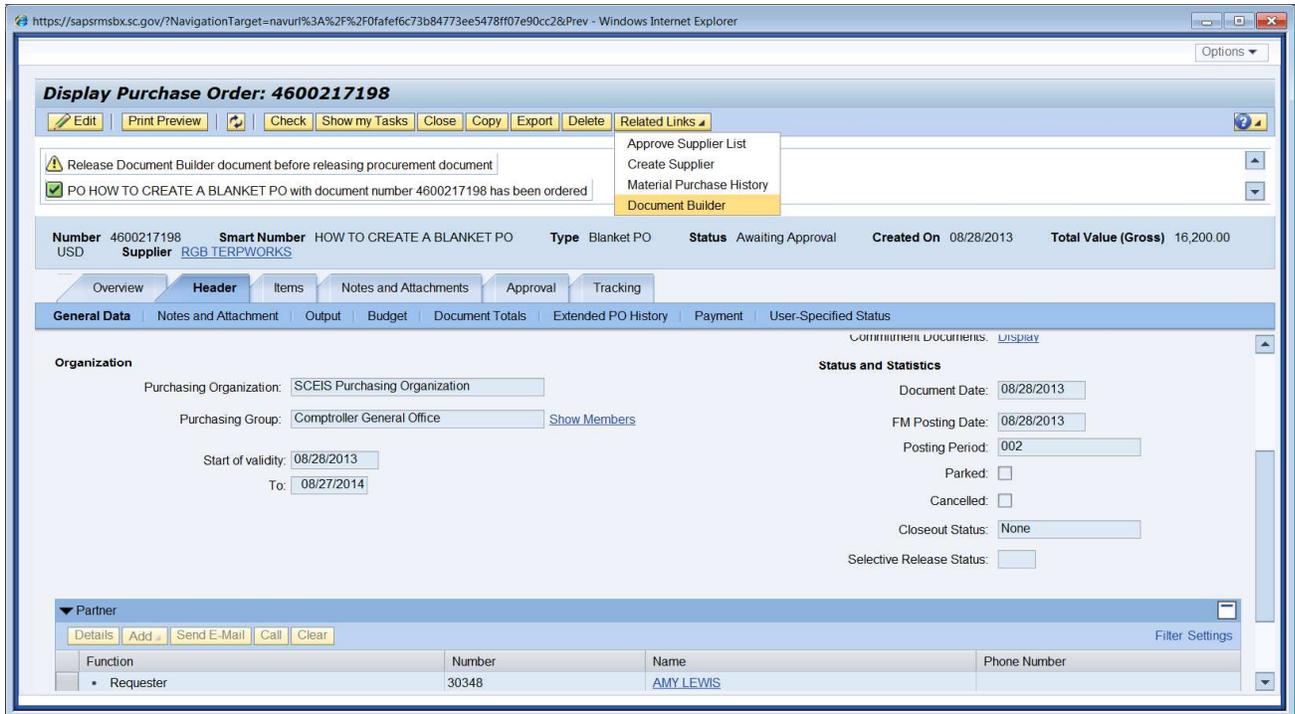
Document Date: 08/28/2013  
 FM Posting Date: \* 08/28/2013  
 Posting Period: \* 002  
 Parked:   
 Cancelled:   
 Closeout Status: None  
 Selective Release Status:

**Partner**

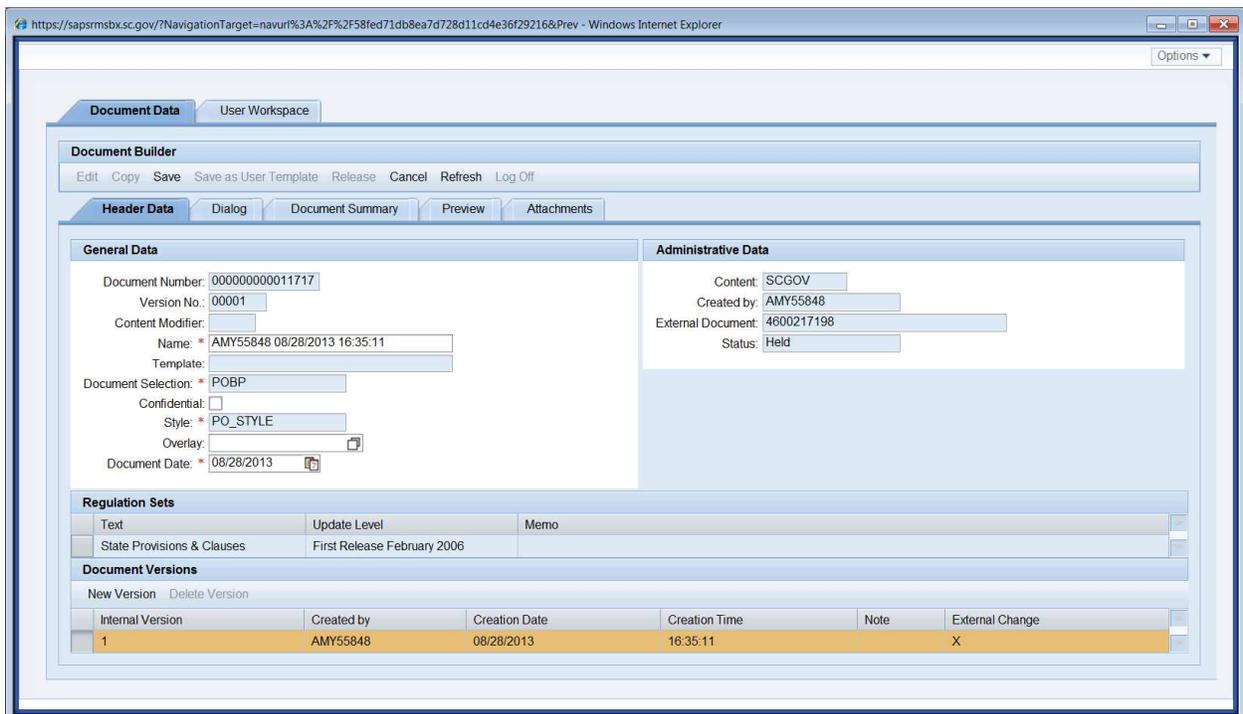
Details | Add | Send E-Mail | Call | Clear    Filter Settings

Function	Number	Name	Phone Number
Requester	30348	AMY LEWIS	
Vendor	7000000458	RGB TERPWORKS	(803) 837-8157
Service Agent			
Goods Recipient	30348	AMY LEWIS	

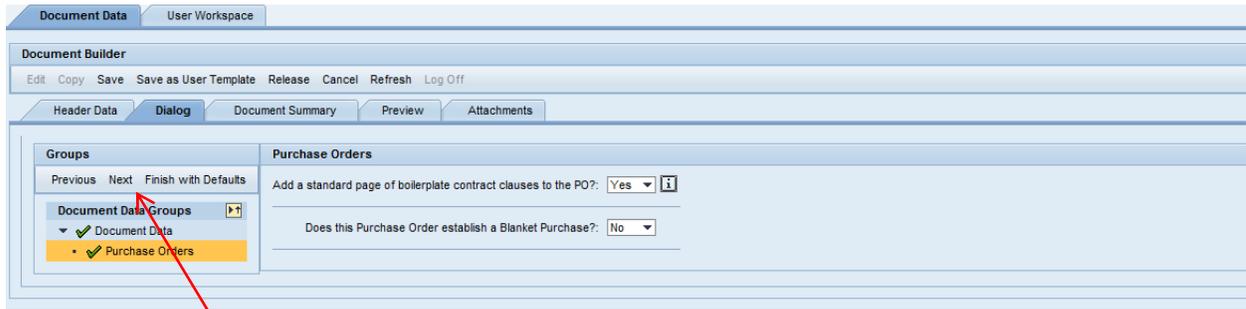
16. Click **Related Links** from the drop-down menu select **Document Builder**.



17. The following screen will display.

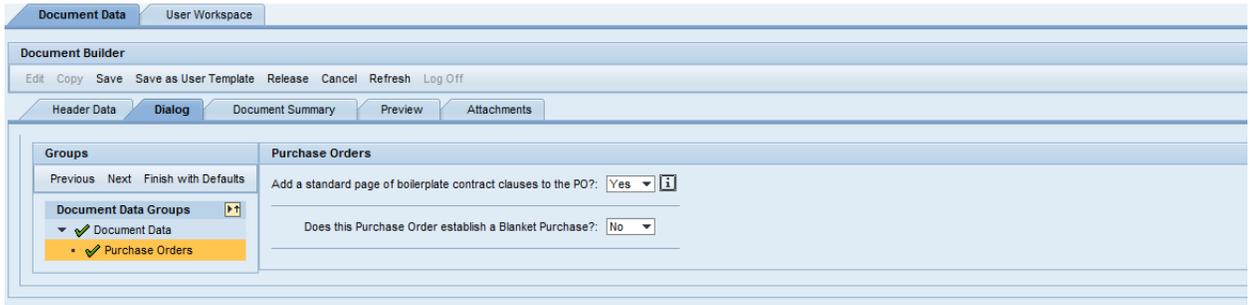


18. Click **Dialog** tab, answer **Yes** and **No** to the questions. **Yes** to the first question will produce Standard Purchase Order clauses. **Yes** to the second question will produce Blanket Agreement Purchase Order Clauses. The answer to question one is always **Yes**.

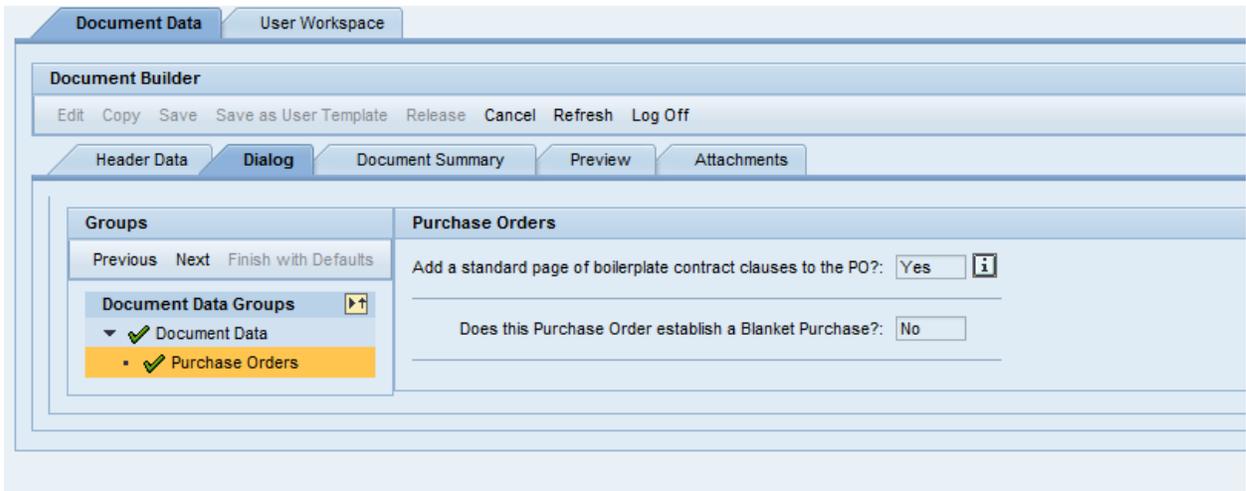


19. After you answer the questions for the appropriate Transaction Type's Purchase Order, then, select **Next** within the Dialog box.

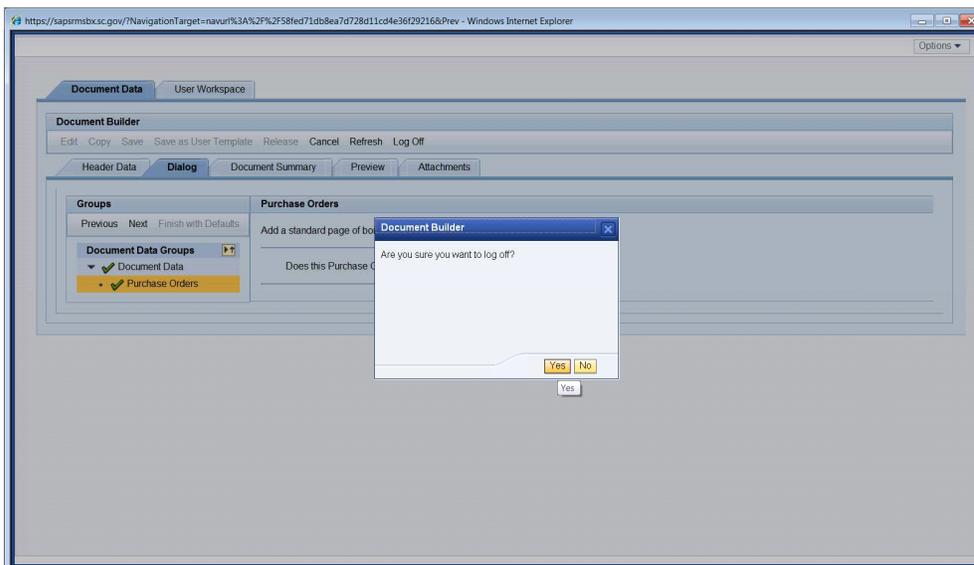
## 20. Then Click **Release**



## 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.

**Display Purchase Order**

[Edit](#) [Print Preview](#) [Check](#) [Close](#) [Copy](#) [Export](#) [System Information](#) [Create Memory Snapshot](#) [Related Links](#)

Purchase Order Number: 4600287335    Purchase Order Type: Blanket PO    Status: Saved    Document Date: 10/30/2013    Total Value (Gross): 200.00 USD    Smart Number

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

---

**▼ Notes**

[Add](#) [Clear](#) [Filter Settings](#)

Assigned To	Category	Text Preview
Item01'Auto Radial Tire'	<a href="#">Vendor Text</a>	Call prior to delivery

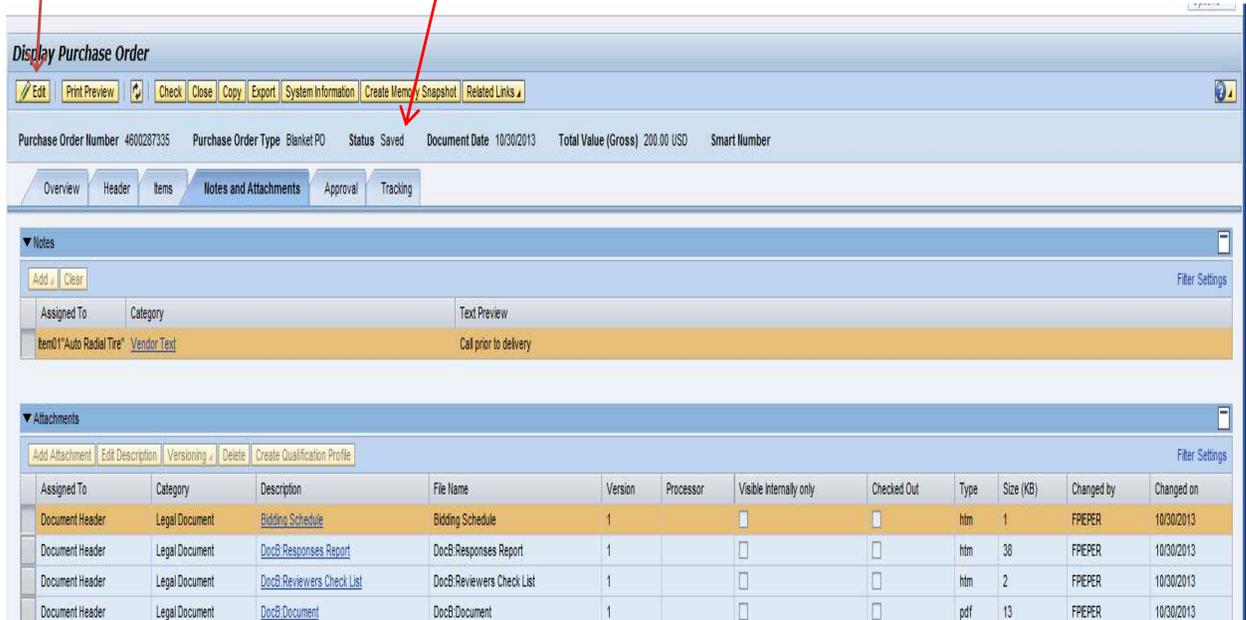
---

**▼ Attachments**

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#) [Create Qualification Profile](#) [Filter Settings](#)

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Legal Document	<a href="#">Bidding Schedule</a>	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1	FPEPER	10/30/2013
Document Header	Legal Document	<a href="#">DocB Responses Report</a>	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38	FPEPER	10/30/2013
Document Header	Legal Document	<a href="#">DocB Reviewers Check List</a>	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2	FPEPER	10/30/2013
Document Header	Legal Document	<a href="#">DocB Document</a>	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13	FPEPER	10/30/2013

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



**Display Purchase Order**

[Edit](#) [Print Preview](#) [Check](#) [Close](#) [Copy](#) [Export](#) [System Information](#) [Create Memory Snapshot](#) [Related Links](#)

Purchase Order Number 4600267335    Purchase Order Type Blanket PO    Status **Saved**    Document Date 10/30/2013    Total Value (Gross) 200.00 USD    Smart Number

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

▼ Notes

[Add](#)   [Clear](#)   [Filter Settings](#)

Assigned To	Category	Text Preview	
Item01 Auto Radial Tire	Vendor Text	Call prior to delivery	

▼ Attachments

[Add Attachment](#)   [Edit Description](#)   [Versioning](#)   [Delete](#)   [Create Qualification Profile](#)   [Filter Settings](#)

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Document Header	Legal Document	<a href="#">Bidding Schedule</a>	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1	FRIEPEP	10/30/2013
Document Header	Legal Document	<a href="#">DocB Responses Report</a>	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38	FRIEPEP	10/30/2013
Document Header	Legal Document	<a href="#">DocB Reviewers Check List</a>	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2	FRIEPEP	10/30/2013
Document Header	Legal Document	<a href="#">DocB Document</a>	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13	FRIEPEP	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 Order**

[Edit](#) [Print Preview](#) [Check](#) [Close](#) [Show my Tasks](#) [Copy](#) [Export](#) [System Information](#) [Create Memory Snapshot](#) [Related Links](#)

PO PR 215 EXERCISE 3 BLANKET with document number 4600287382 has been ordered

Purchase Order Number 4600287382    Purchase Order Type Blanket PO    Status Awaiting Approval    Document Date 10/30/2013    Total Value (Gross) 2,500.00 USD    Smart Number    Supplier [CONTINENTAL TIRE NORTH AMERICA](#)

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

▼ Notes

[Add](#) [Clear](#)

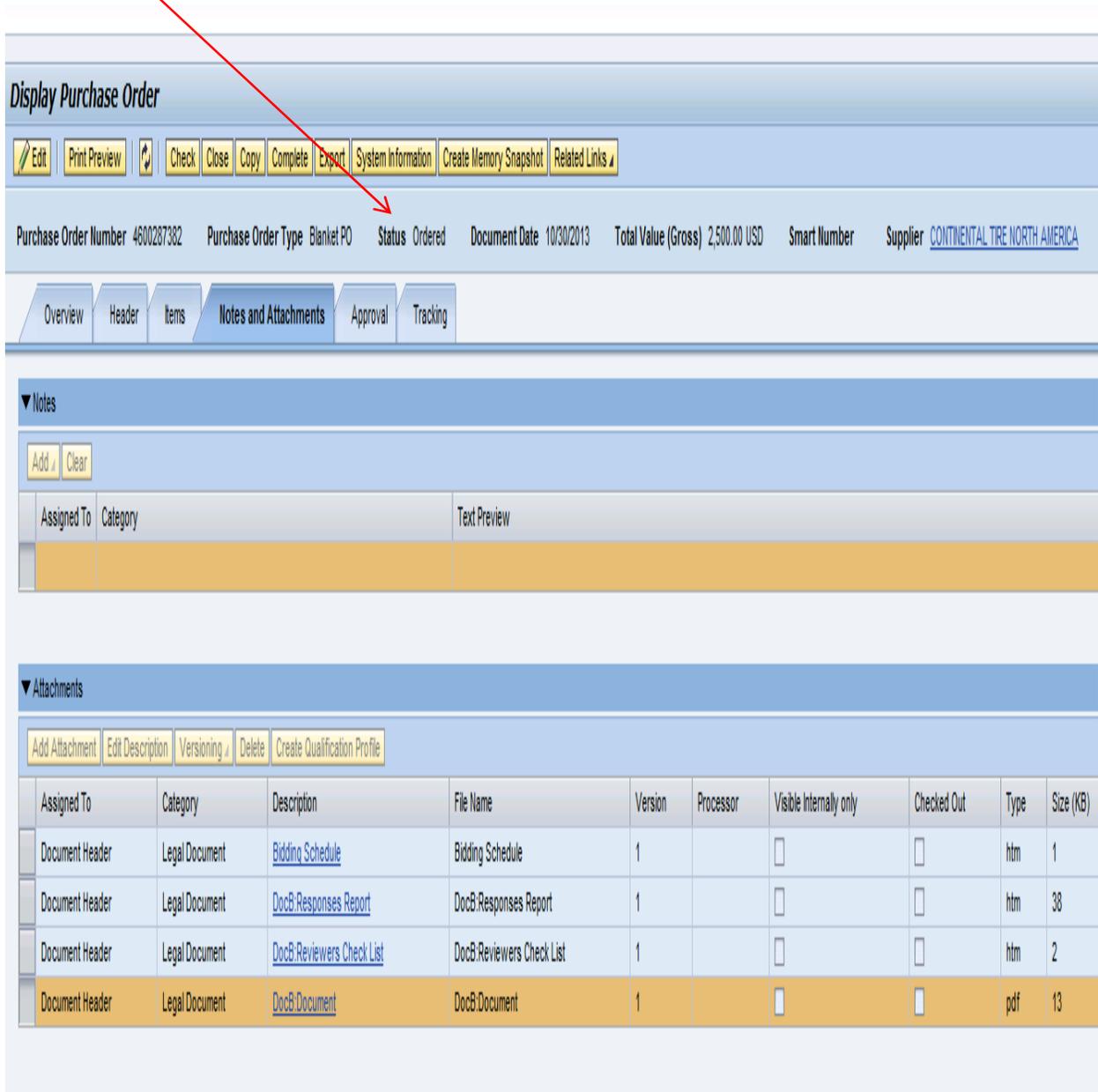
Assigned To	Category	Text Preview	

▼ Attachments

[Add Attachment](#) [Edit Description](#) [Versioning](#) [Delete](#) [Create Qualification Profile](#)

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)
Document Header	Legal Document	<a href="#">Bidding Schedule</a>	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1
Document Header	Legal Document	<a href="#">DocB Responses Report</a>	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38
Document Header	Legal Document	<a href="#">DocB Reviewers Check List</a>	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2
Document Header	Legal Document	<a href="#">DocB Document</a>	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13

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



**Display Purchase Order**

Edit Print Preview Refresh Check Close Copy Complete Export System Information Create Memory Snapshot Related Links

Purchase Order Number 4600287382    Purchase Order Type Blanket PO    Status **Ordered**    Document Date 10/30/2013    Total Value (Gross) 2,500.00 USD    Smart Number    Supplier [CONTINENTAL TIRE NORTH AMERICA](#)

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

▼ Notes

Add Clear

Assigned To	Category	Text Preview

▼ Attachments

Add Attachment Edit Description Versioning Delete Create Qualification Profile

Assigned To	Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)
Document Header	Legal Document	<a href="#">Bidding Schedule</a>	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1
Document Header	Legal Document	<a href="#">DocB Responses Report</a>	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38
Document Header	Legal Document	<a href="#">DocB Reviewers Check List</a>	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2
Document Header	Legal Document	<a href="#">DocB Document</a>	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13

Blanket PO Created: \_\_\_\_\_