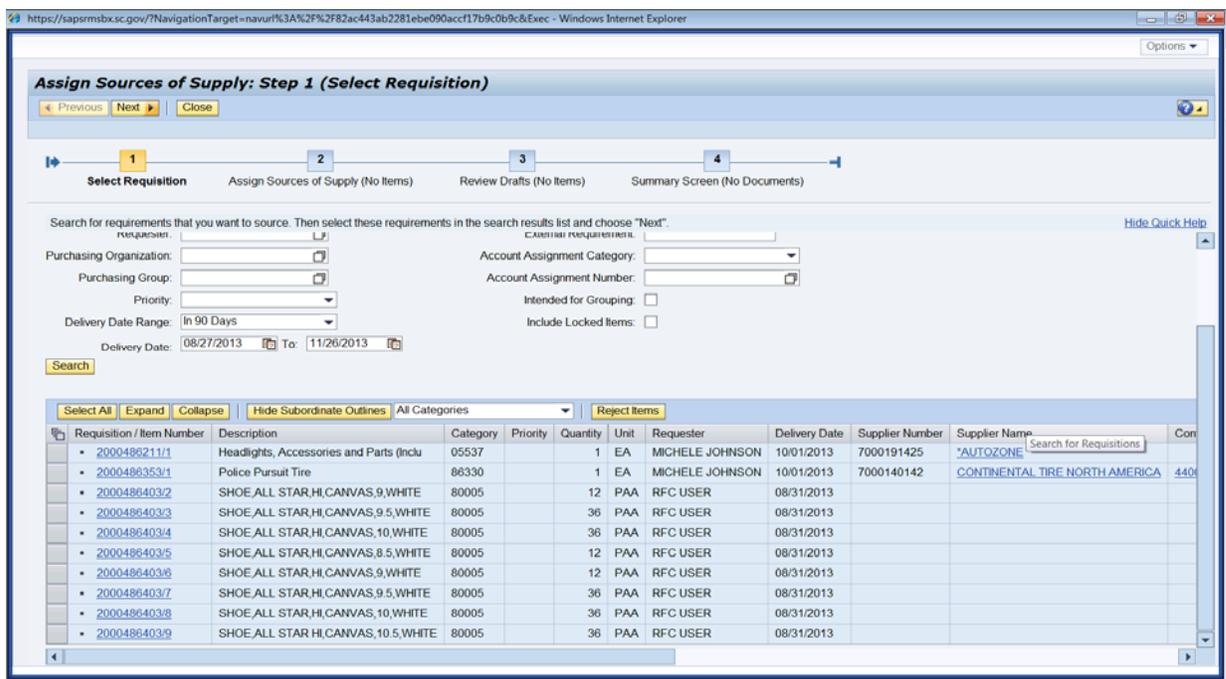


Exercise 3

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**.



Assign Sources of Supply: Step 1 (Select Requisition)

Search for requirements that you want to source. Then select these requirements in the search results list and choose "Next".

Purchasing Organization: Account Assignment Category:

Purchasing Group: Account Assignment Number:

Priority: Intended for Grouping:

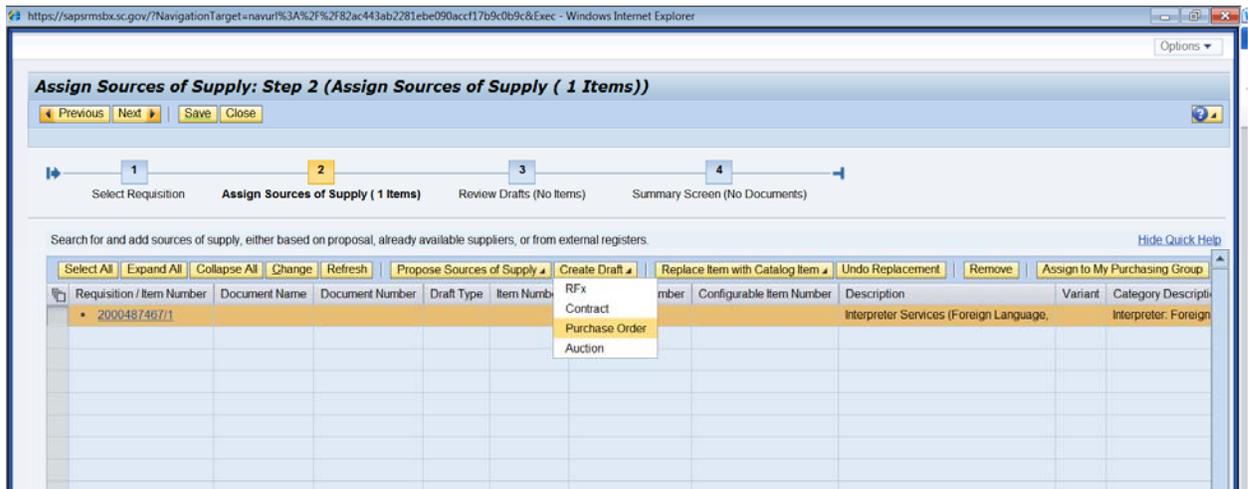
Delivery Date Range: **In 90 Days** Include Locked Items:

Delivery Date: 08/27/2013 To: 11/26/2013

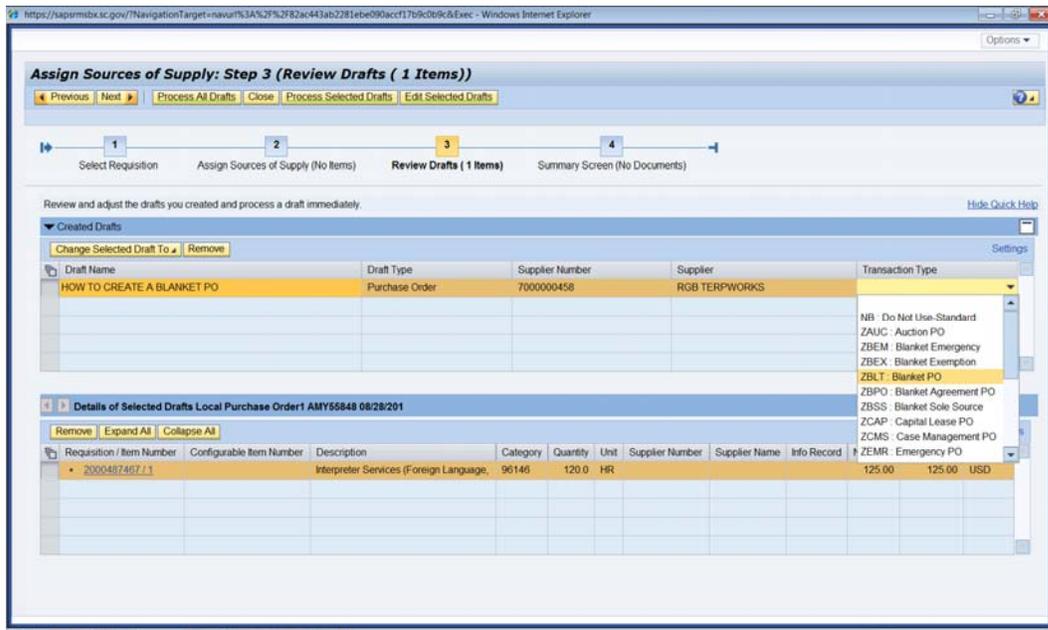
Search

Requisition / Item Number	Description	Category	Priority	Quantity	Unit	Requester	Delivery Date	Supplier Number	Supplier Name
2000486211/1	Headlights, Accessories and Parts (Inclu	05537		1	EA	MICHELE JOHNSON	10/01/2013	7000191425	AUTOZONE
2000486353/1	Police Pursuit Tire	86330		1	EA	MICHELE JOHNSON	10/01/2013	7000140142	CONTINENTAL TIRE NORTH AMERICA
2000486403/2	SHOE,ALL STAR,HI,CANVAS,9,WHITE	80005		12	PAA	RFC USER	08/31/2013		
2000486403/3	SHOE,ALL STAR,HI,CANVAS,9.5,WHITE	80005		36	PAA	RFC USER	08/31/2013		
2000486403/4	SHOE,ALL STAR,HI,CANVAS,10,WHITE	80005		36	PAA	RFC USER	08/31/2013		
2000486403/5	SHOE,ALL STAR,HI,CANVAS,8.5,WHITE	80005		12	PAA	RFC USER	08/31/2013		
2000486403/6	SHOE,ALL STAR,HI,CANVAS,9,WHITE	80005		12	PAA	RFC USER	08/31/2013		
2000486403/7	SHOE,ALL STAR,HI,CANVAS,9.5,WHITE	80005		36	PAA	RFC USER	08/31/2013		
2000486403/8	SHOE,ALL STAR,HI,CANVAS,10,WHITE	80005		36	PAA	RFC USER	08/31/2013		
2000486403/9	SHOE,ALL STAR,HI,CANVAS,10.5,WHITE	80005		36	PAA	RFC USER	08/31/2013		

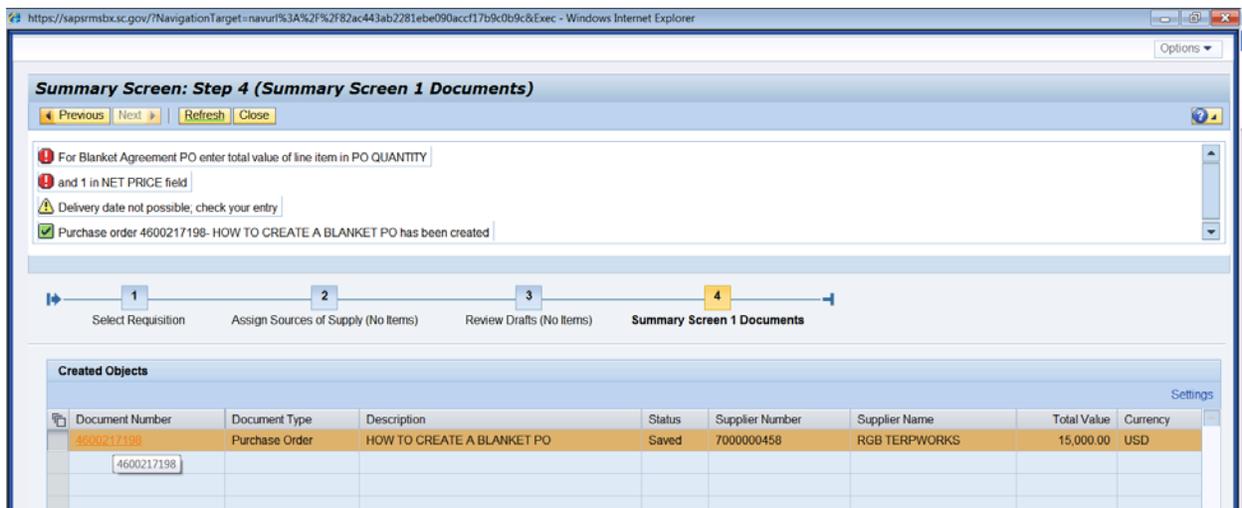
9. Click **Create Draft**. Using the drop-down, select **Purchase Order** (this automatically takes you to Step 3).



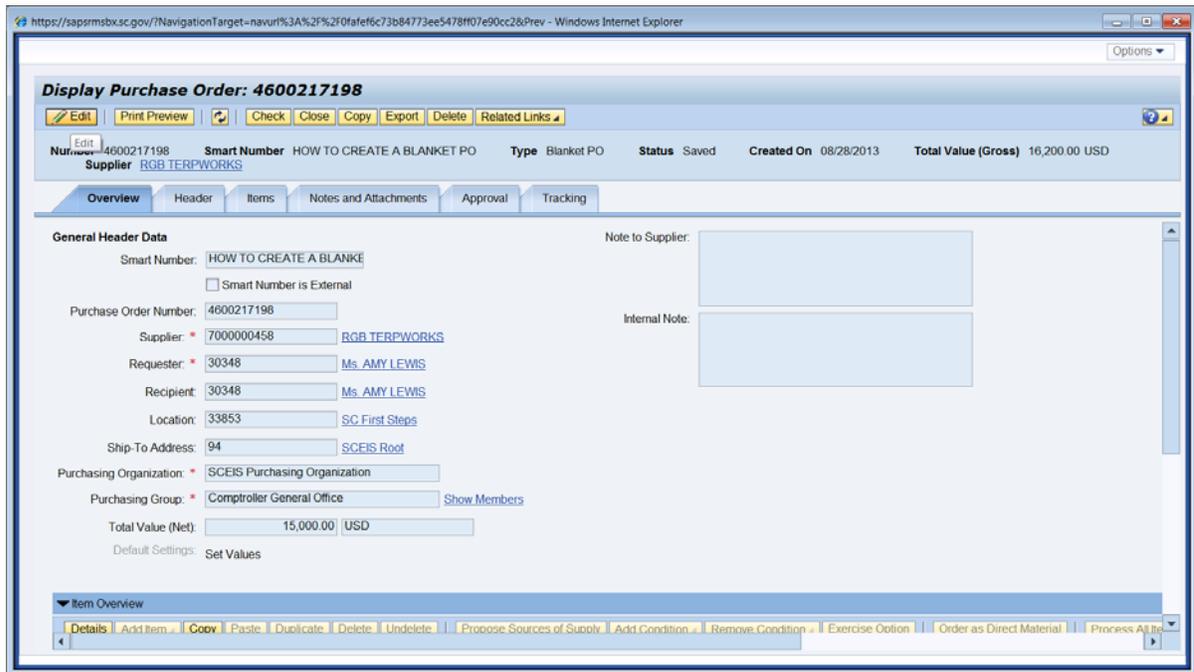
10. In **Draft Name** field, change the name to PR215 PO Exercise 3. In the **Transaction Type** field, use the drop-down menu to select **ZLBT Blanket PO**. Click **Process Selected Drafts**. NOTE: Once the Transaction Type has been selected and ordered it cannot be changed. If the PO Transaction Type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

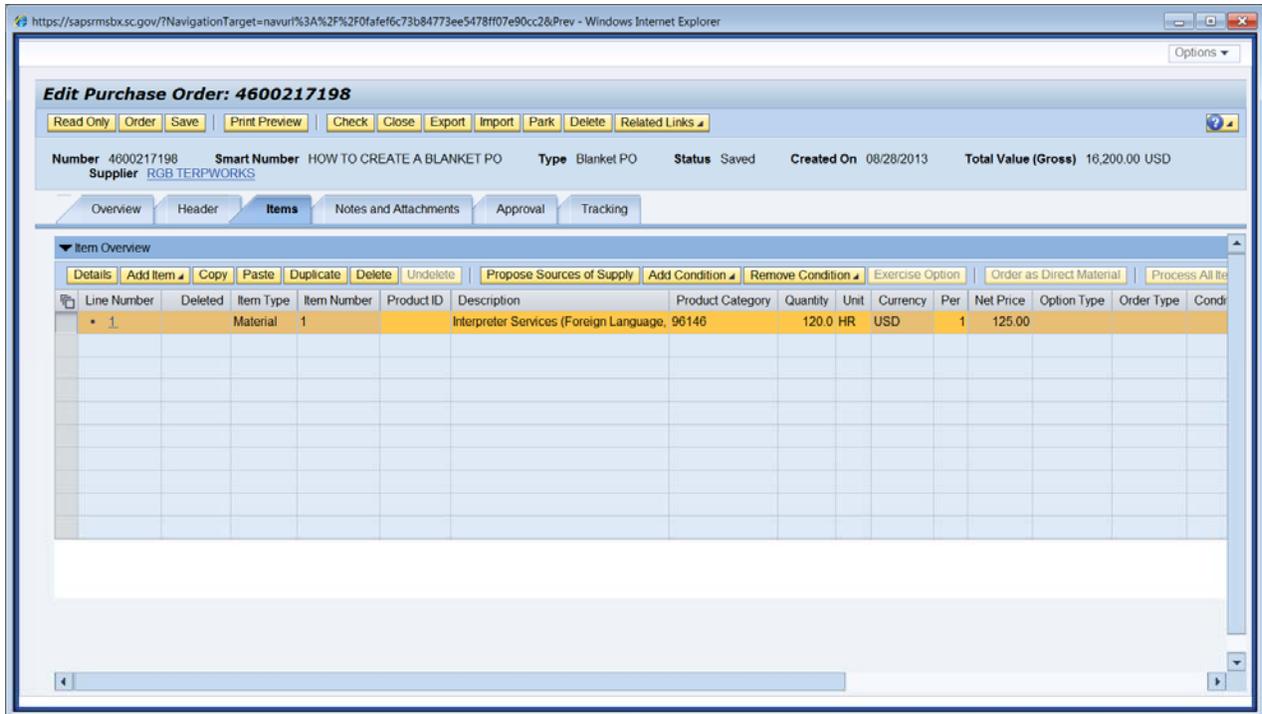


12. Click **Edit**.

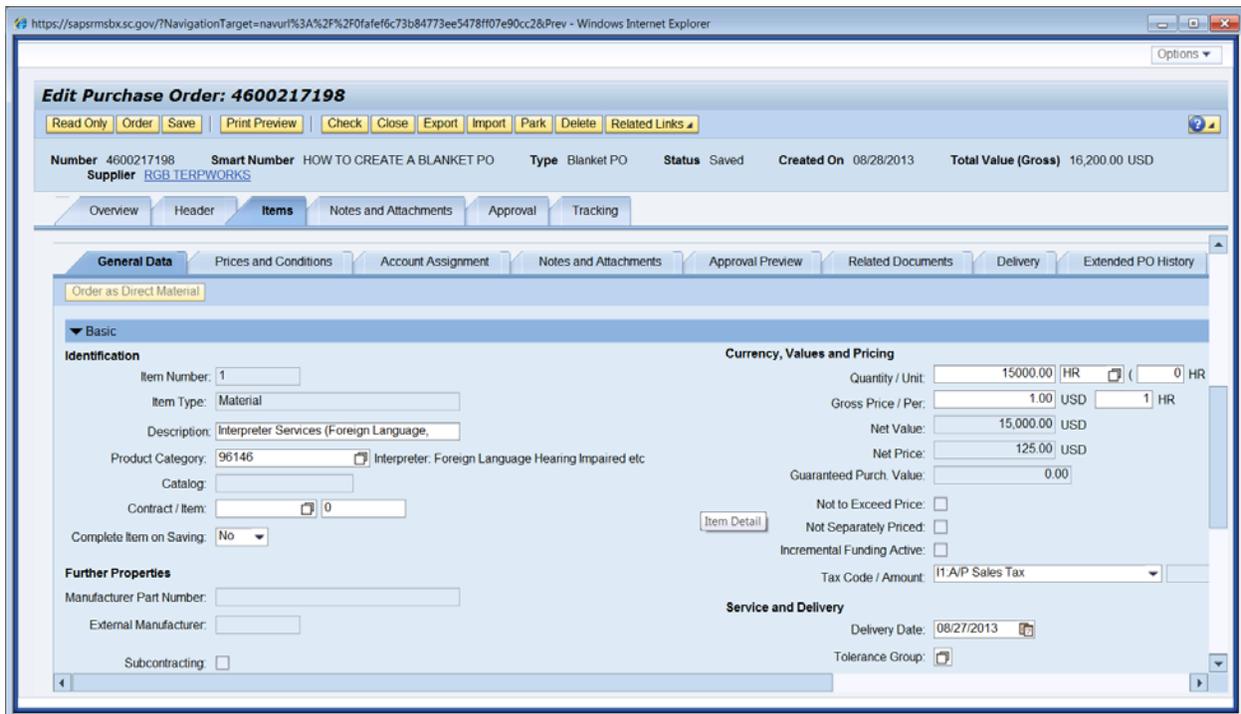


The screenshot shows the SAP SRM 'Display Purchase Order' interface. At the top, the title is 'Display Purchase Order: 4600217198'. Below the title is a toolbar with buttons for Edit, Print Preview, Check, Close, Copy, Export, Delete, and Related Links. The main header area displays the following information: Number: 4600217198, Smart Number: HOW TO CREATE A BLANKET PO, Type: Blanket PO, Status: Saved, Created On: 08/28/2013, and Total Value (Gross): 16,200.00 USD. The Supplier is listed as RGB TERPWORKS. Below the header is a navigation bar with tabs for Overview, Header, Items, Notes and Attachments, Approval, and Tracking. The 'Overview' tab is selected, showing 'General Header Data'. This section includes fields for Smart Number (HOW TO CREATE A BLANKET PO), 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), and Purchasing Group (Comptroller General Office). There are also fields for Note to Supplier and Internal Note. At the bottom, the 'Item Overview' section is visible, showing a toolbar with buttons for Details, Add Item, Copy, Paste, Duplicate, Delete, Undelete, Propose Sources of Supply, Add Condition, Remove Condition, Exercise Option, Order as Direct Material, and Process All Items.

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**.



The screenshot displays the 'Edit Purchase Order' interface for order number 4600217198. The 'Items' tab is active, showing details for item 1. The 'Basic' section includes the following fields:

- Identification:** Item Number: 1, Item Type: Material, Description: Interpreter Services (Foreign Language,)
- Product Category:** 96146 Interpreter: Foreign Language Hearing Impaired etc
- Contract / Item:** 0
- Complete Item on Saving:** No
- Further Properties:** Manufacturer Part Number, External Manufacturer, Subcontracting (checkbox)

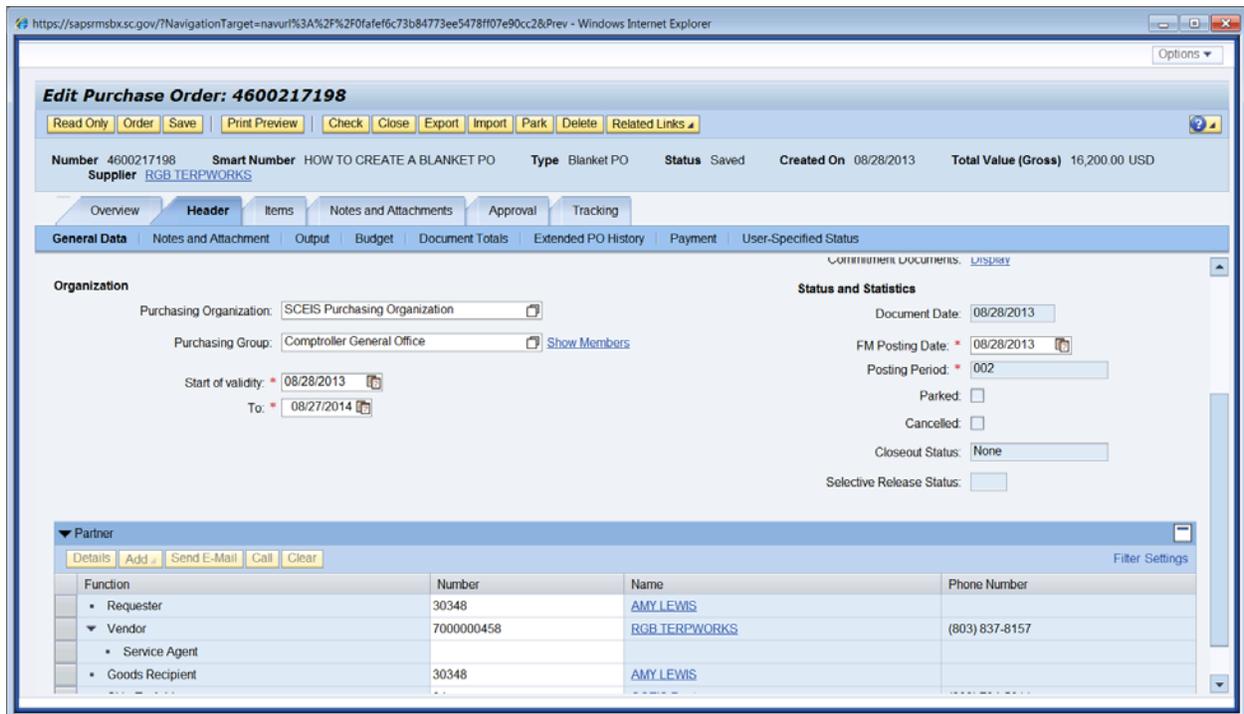
The 'Currency, Values and Pricing' section shows:

- 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
- Tax Code / Amount:** 11/AP Sales Tax

The 'Service and Delivery' section shows:

- Delivery Date:** 08/27/2013
- Tolerance Group:** (checkbox)

- 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

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: [List/Print](#)

Organization

Purchasing Organization:

Purchasing Group: [Show Members](#)

Start of validity:

To:

Status and Statistics

Document Date:

FM Posting Date:

Posting Period:

Parked:

Cancelled:

Closeout Status:

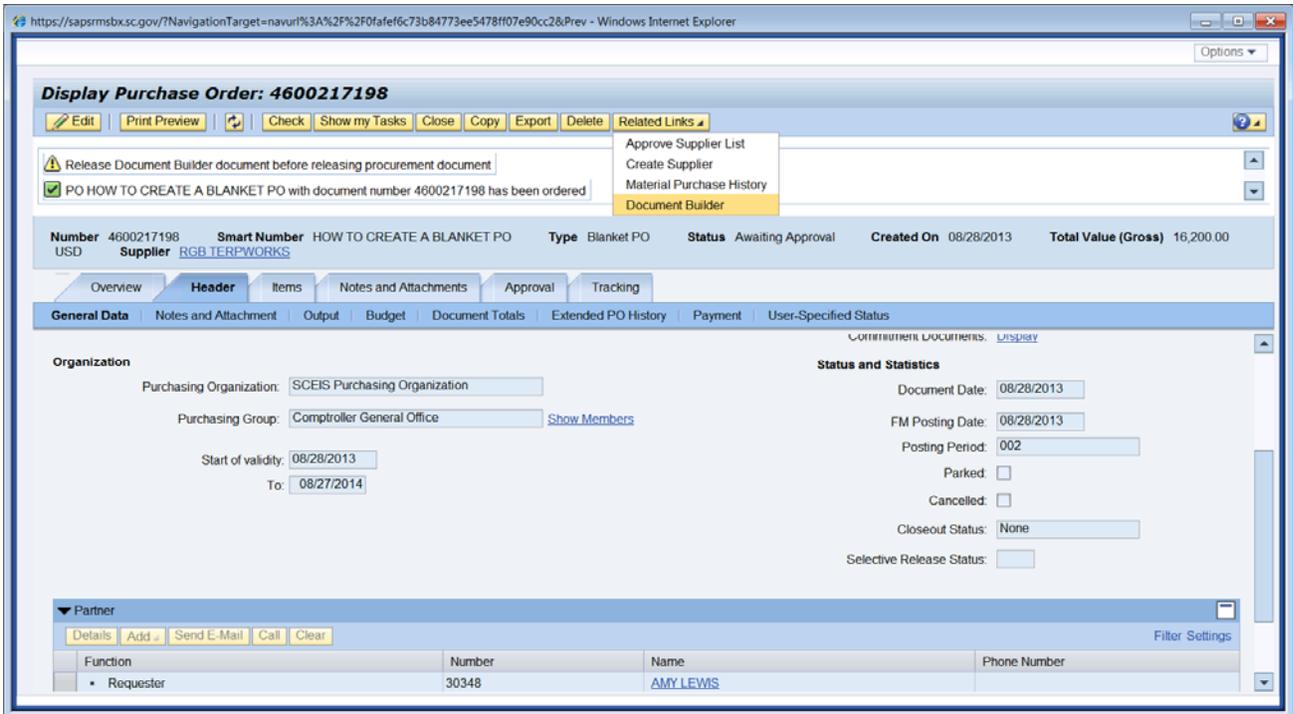
Selective Release Status:

Partner

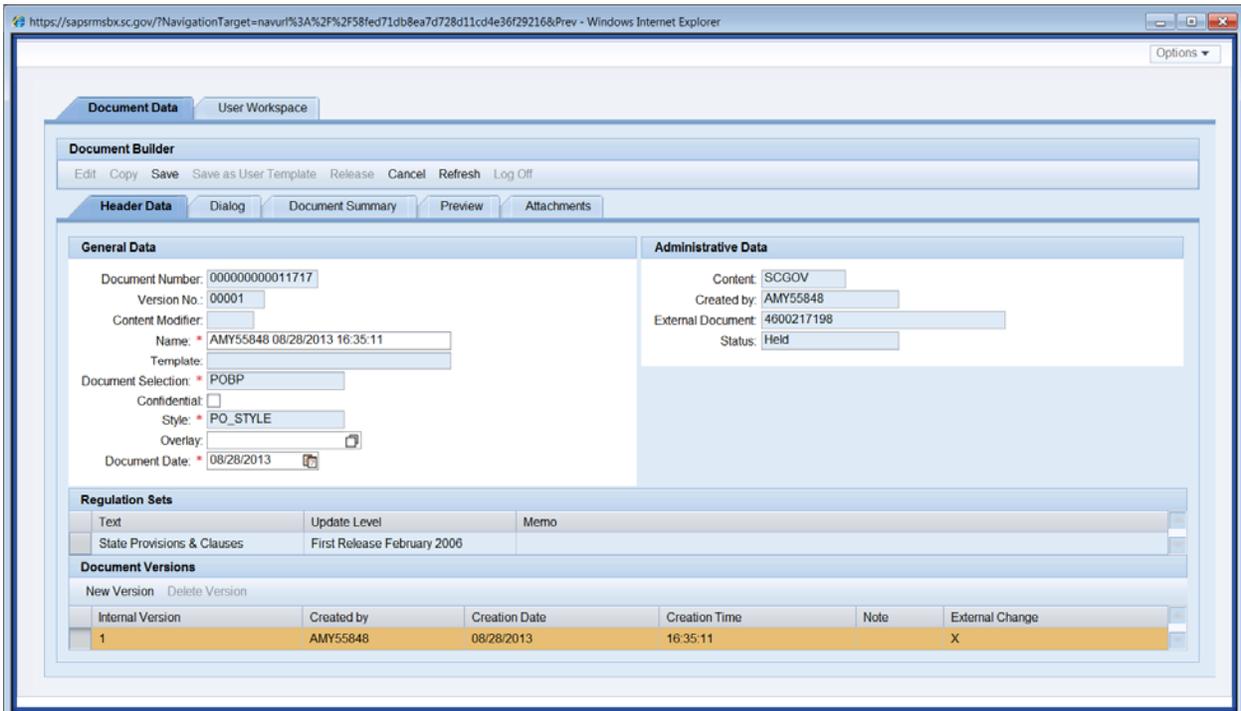
Details Add Send E-Mail Call Clear Filter Settings

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

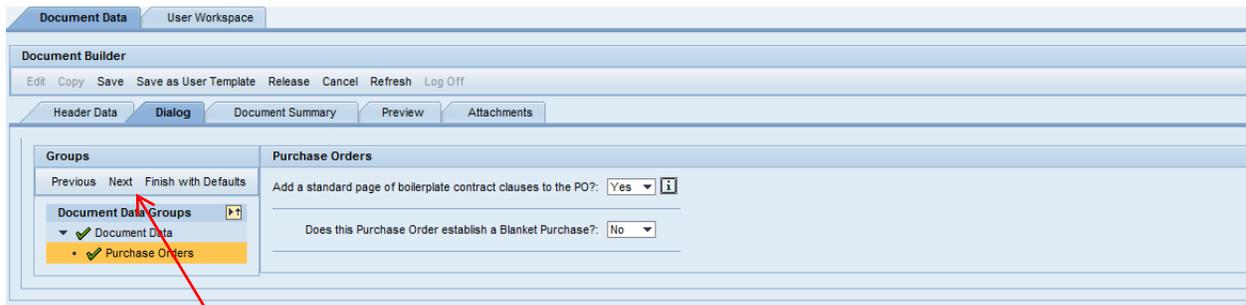
16. Click **Related Links** from the drop-down menu select **Document Builder**.



17. The following screen will display.

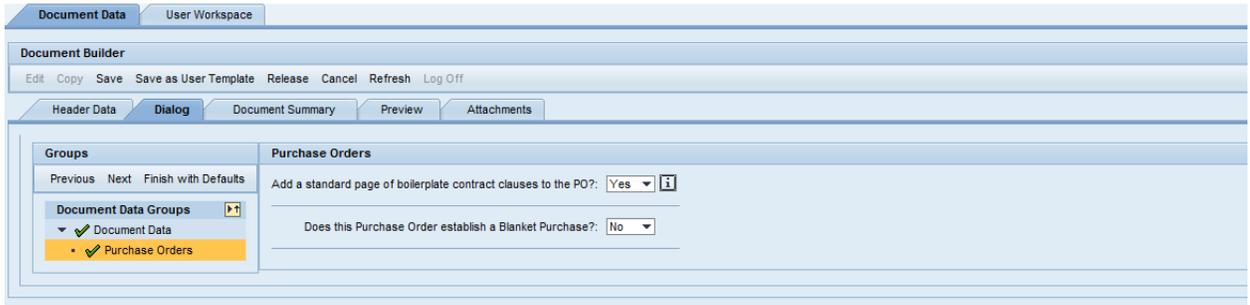


18. Click **Dialog** tab, answer **Yes** and **No** to the questions. **Yes** to the first question will produce Standard Purchase Order clauses. **Yes** to the second question will produce Blanket Agreement Purchase Order Clauses. The answer to question one is always **Yes**.

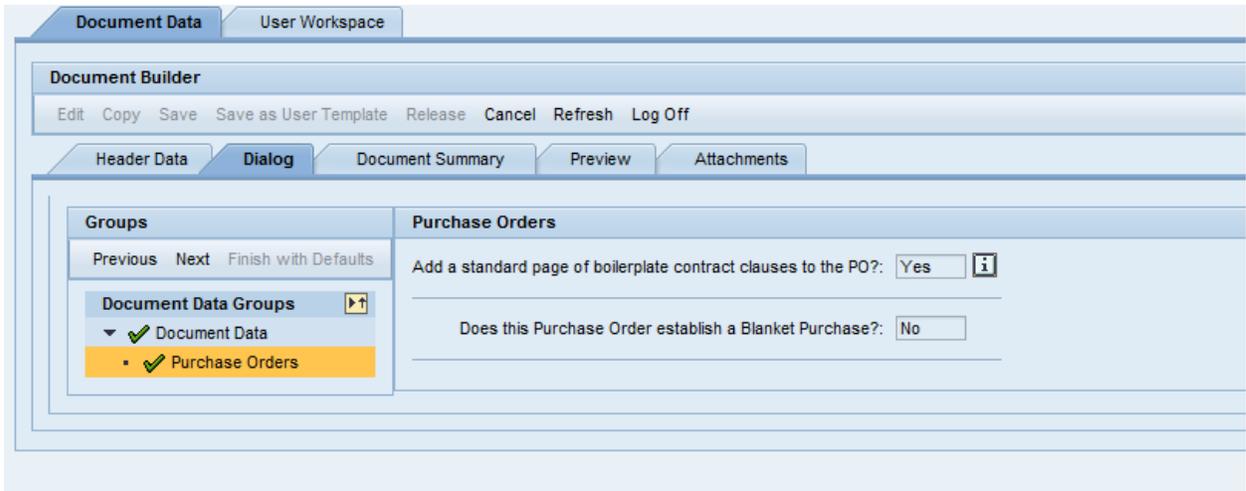


19. After you answer the questions for the appropriate Transaction Type's Purchase Order, then, select **Next** within the Dialog box.

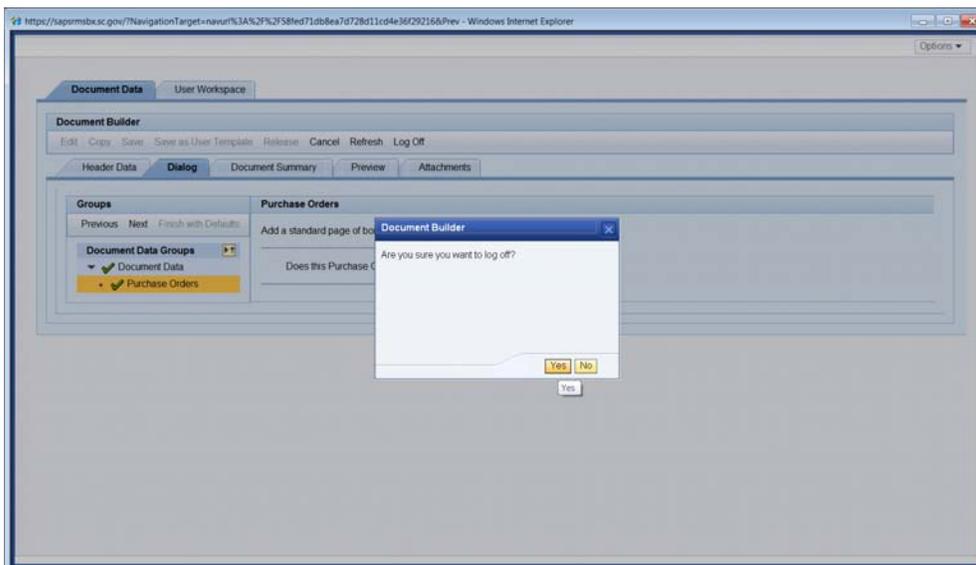
20. Then Click **Release**



21. Click **Log Off**.



22. Click **Yes**.



23. Click the **Refresh** icon to get the latest version of the PO. The documents you just created will be located in **Notes and Attachments** tab under the Description of “DocB: 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](#)

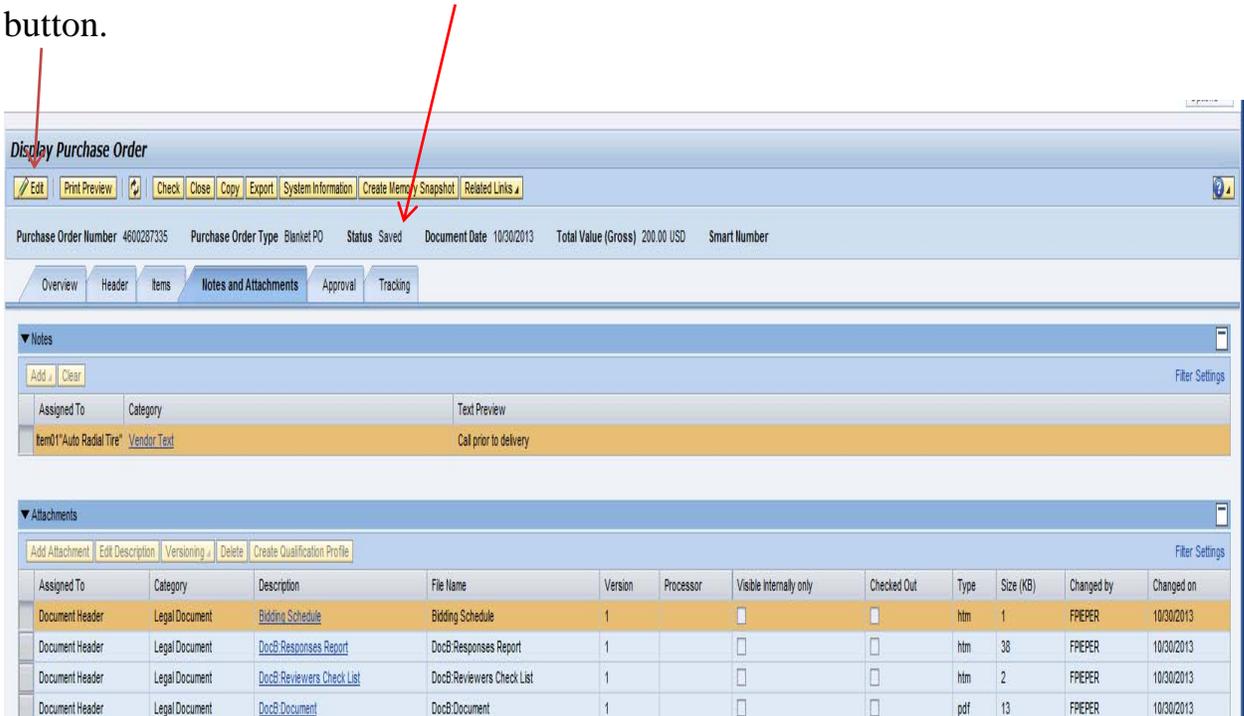
Assigned To	Category	Text Preview
Item01"Auto Radial Tire"	Vendor Text	Call prior to delivery

▼ 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	Bidding Schedule	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1	FPEPER	10/30/2013
Document Header	Legal Document	DocB Responses Report	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38	FPEPER	10/30/2013
Document Header	Legal Document	DocB Reviewers Check List	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2	FPEPER	10/30/2013
Document Header	Legal Document	DocB Document	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: 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"	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	Bidding Schedule	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1	FPEPER	10/30/2013
Document Header	Legal Document	DocB Responses Report	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38	FPEPER	10/30/2013
Document Header	Legal Document	DocB Reviewers Check List	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2	FPEPER	10/30/2013
Document Header	Legal Document	DocB Document	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13	FPEPER	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](#)

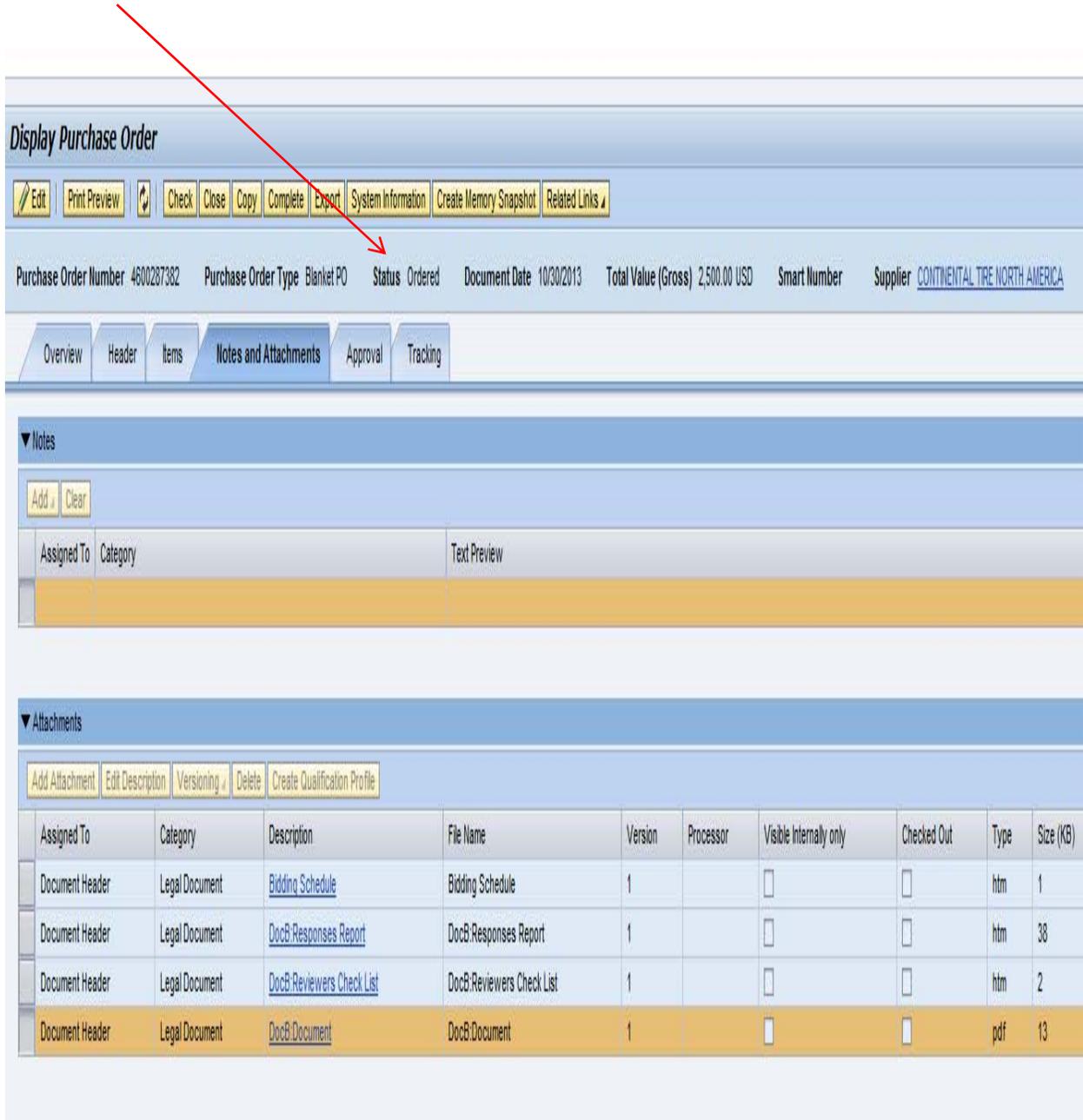
Assigned To	Category	Text Preview

▼ **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)	C
Document Header	Legal Document	Bidding Schedule	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1	F
Document Header	Legal Document	DocB Responses Report	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38	F
Document Header	Legal Document	DocB Reviewers Check List	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2	F
Document Header	Legal Document	DocB Document	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13	F

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	Bidding Schedule	Bidding Schedule	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	1
Document Header	Legal Document	DocB Responses Report	DocB Responses Report	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	38
Document Header	Legal Document	DocB Reviewers Check List	DocB Reviewers Check List	1		<input type="checkbox"/>	<input type="checkbox"/>	htm	2
Document Header	Legal Document	DocB Document	DocB Document	1		<input type="checkbox"/>	<input type="checkbox"/>	pdf	13

Blanket PO Created: _____