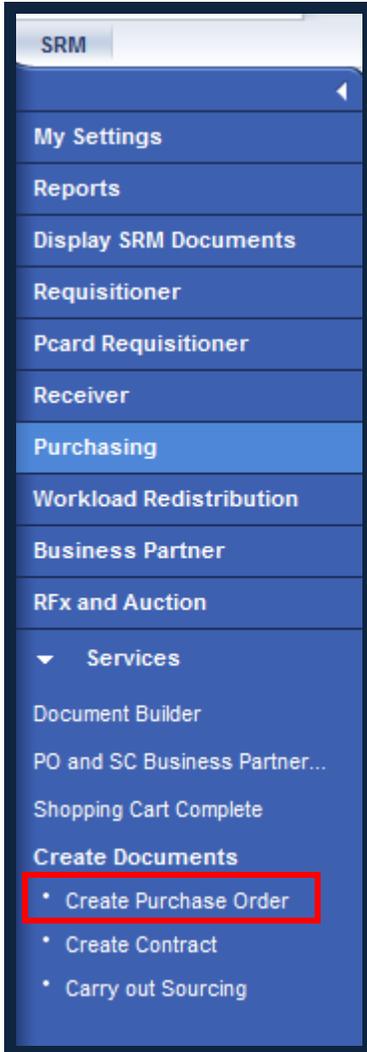
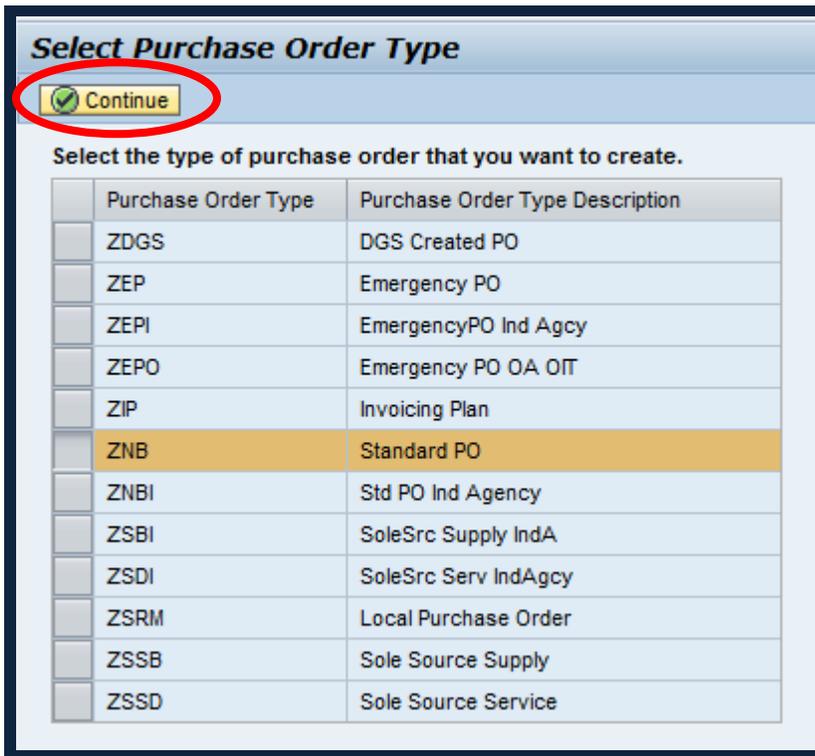


Create SRM 7.0 Stand-Alone Purchase Order (PO)

1. Select Purchasing, Create Purchase Orders in the left navigation pane of the Commonwealth Workplace



2. Select the appropriate Purchase Order transaction type and select the CONTINUE button



Select Purchase Order Type

Select the type of purchase order that you want to create.

Purchase Order Type	Purchase Order Type Description
ZDGS	DGS Created PO
ZEP	Emergency PO
ZEPI	EmergencyPO Ind Agcy
ZEPO	Emergency PO OA OIT
ZIP	Invoicing Plan
ZNB	Standard PO
ZNBI	Std PO Ind Agency
ZSBI	SoleSrc Supply IndA
ZSDI	SoleSrc Serv IndAgcy
ZSRM	Local Purchase Order
ZSSB	Sole Source Supply
ZSSD	Sole Source Service

In the example above, we selected the ZNB Standard Purchase Order type.

For Sole Source POs created by agencies designated “Independent”, use transaction types ZSBI and ZSDI.

For all other Sole Source POs created by agencies, use transaction types ZSSB and ZSSD.

3. Once you select the CONTINUE button, you will default to the Overview tab
4. In the General Header Data, complete the applicable fields:
 - PO Name
 - There is a 40-character limit which includes letters, punctuation, and spaces
 - Name must include:
 - 4-digit UNSPSC code (product category)
 - Space or Dash
 - Noun that describes the item
 - Example: 2517 Radial Tires

- Supplier
- Requester
- Recipient
- Location
- Ship-To Address
- Purchasing Organization and Purchasing Group

5. In the Item Overview, complete the applicable fields

6. Select the DETAILS button to go to the Item details

Create Purchase Order

Order Save Print Preview Check Close Related Links

PO's without reference to a contract <=10K not allowed
 Line 1: No GL account was entered; enter a GL account
 Line 1: Error in account assignment for item 1
 Line 1: Enter a value in the mandatory field Cost Center in account assignment

Purchase Order Number: 4300385748 Purchase Order Type: Standard PO Status: In Process Document Date: 11/25/2013 Total Value (Gross): 1,347.50 USD Smart Number Supplier: THE HON COMPANY LLC

Overview Header Items Notes and Attachments Approval Tracking

General Header Data

Smart Number: P00446880 11/25/2013 16:01
 Smart Number is External
 Note to Supplier:

Purchase Order Number: 4300385748
 PO Name: 5610 Seating
 Internal Note:

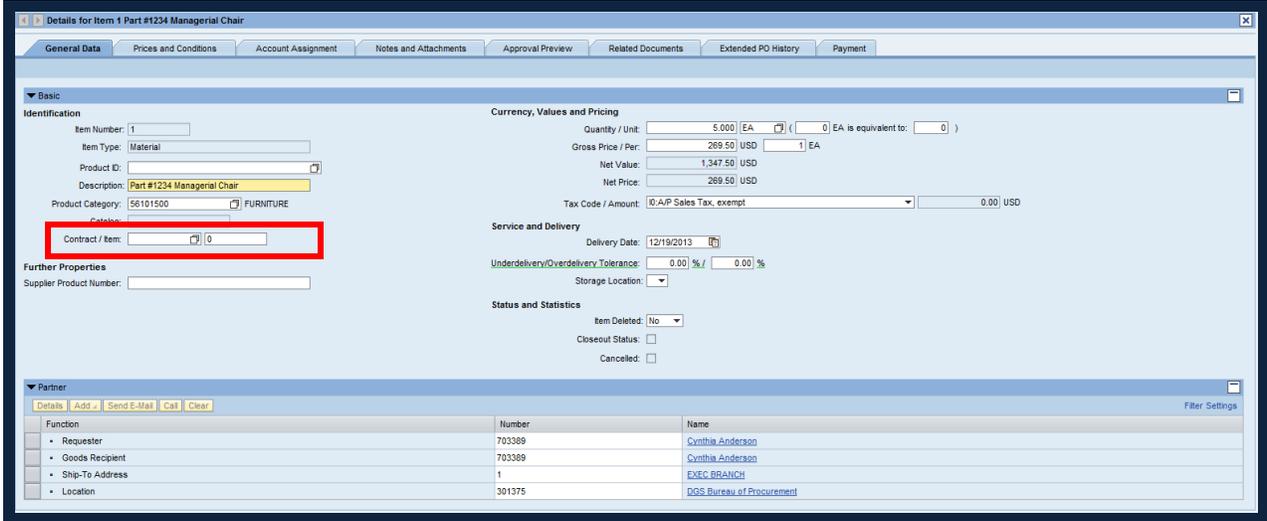
Supplier: * 164569 THE HON COMPANY LLC
 Requester: * 703389 Cynthia Anderson
 Recipient: * 703389 Cynthia Anderson
 Location: 301375 DGS Bureau of Procurement
 Ship-To Address: 1 EXEC BRANCH
 Purchasing Organization: * COPA Purchasing Organization
 Purchasing Group: * DGS Central Purchase Purchasing Group Show Members
 Total Value (Net): 1,347.50

Item Overview

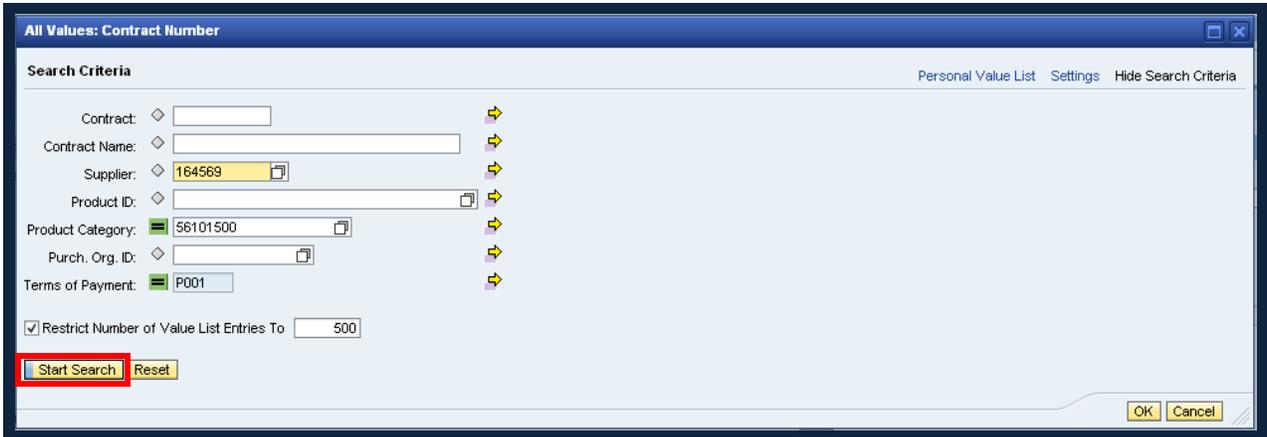
Details Add Item Copy Paste Duplicate Delete Propose Sources of Supply Add Condition Remove Condition Process All Items Filter Settings

Line Number	Deleted	Item Type	Item Number	Product ID	Description	Product Category	Quantity	Unit	Gross Price	Currency	Per	Net Price	Option Type	Order Type	Condition	Option Status	Delivery Date	Account Assignment Type	Account Assignment Number	
1		Material	1		Part #1234 Managerial Chair	56101500	5.000	EA	269.50	USD	1	269.50					12/19/2013	Cost Center		
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
*		Material	0				0.000		0.00	USD	0	0.00								
																		Total Value (Net)	1,347.50	USD
																		Total Tax	0.00	USD
																		Total Value (Gross)	1,347.50	USD

7. The General Data sub-tab will display, data should default from the Item Overview. Verify the information, and add any additional information that is applicable. Select the Contract/Item field to enter a contract number/contract line item. A match code will appear, select the match code to search for the contract number/ contract line item.



8. Enter applicable criteria such as contract number (if known), supplier, or product category to locate applicable contract and line items. Select the START SEARCH button.



9. The results will display as shown below. Select the option of choice by selecting the *gray* box, then select the OK button

Results List: 20 results found for Contract / Item

Con...	Contract Name	Item Nu...	Description	Product ID	Product Cat.	Supplier	Name 1 Mast nm	Print T...
440000...	COMMERCIAL FURNITURE	0000000...	Seating	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Tables	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Library, Classroom, Music	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Free Standing Office	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Healthcare Furniture	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Lounge & Meeting Room	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Computer	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Executive Wood (Freestan...	56101500	164569	THE HON COMPANY LLC	P001	
440000...	COMMERCIAL FURNITURE	0000000...	Desking/Classroom Systems	56101500	164569	THE HON COMPANY LLC	P001	

OK Cancel

10. The information will populate in the contract/item field as shown below

Details for Item 1 Part #1234 Managerial Chair

General Data Prices and Conditions Account Assignment Notes and Attachments Approval Preview Related Documents Extended PO History

Basic

Identification

Item Number: 1

Item Type: Material

Product ID:

Description: Part #1234 Managerial Chair

Product Category: 56101500 FURNITURE

Catalog:

Contract / Item: 4400009412 0000000001

Supplier Product Number:

Currency, Values and Pricing

Quantity / Unit: 5.000 EA (0 EA is equivalent to: 0)

Gross Price / Per: 269.50 USD 1 EA

Net Value: 1,347.50 USD

Net Price: 269.50 USD

Tax Code / Amount: 10:A/P Sales Tax, exempt

Service and Delivery

Delivery Date: 12/19/2013

Underdelivery/Overdelivery Tolerance: 0.00 % / 0.00 %

Storage Location:

Status and Statistics

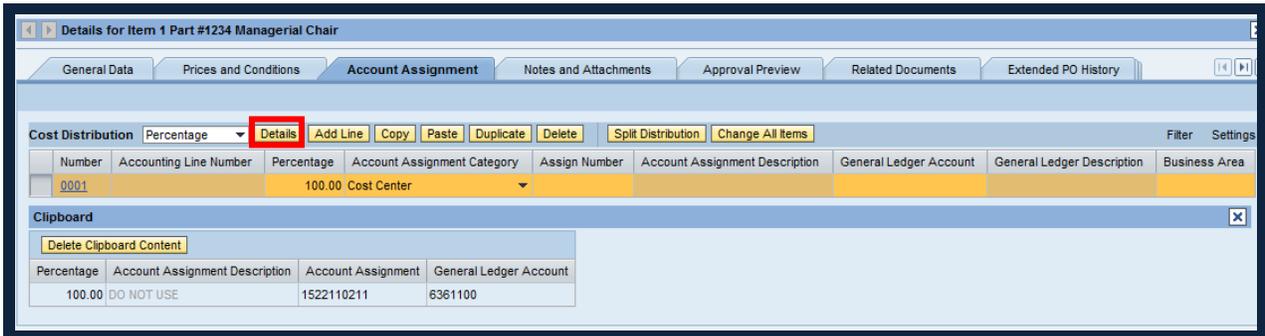
Item Deleted: No

Closeout Status:

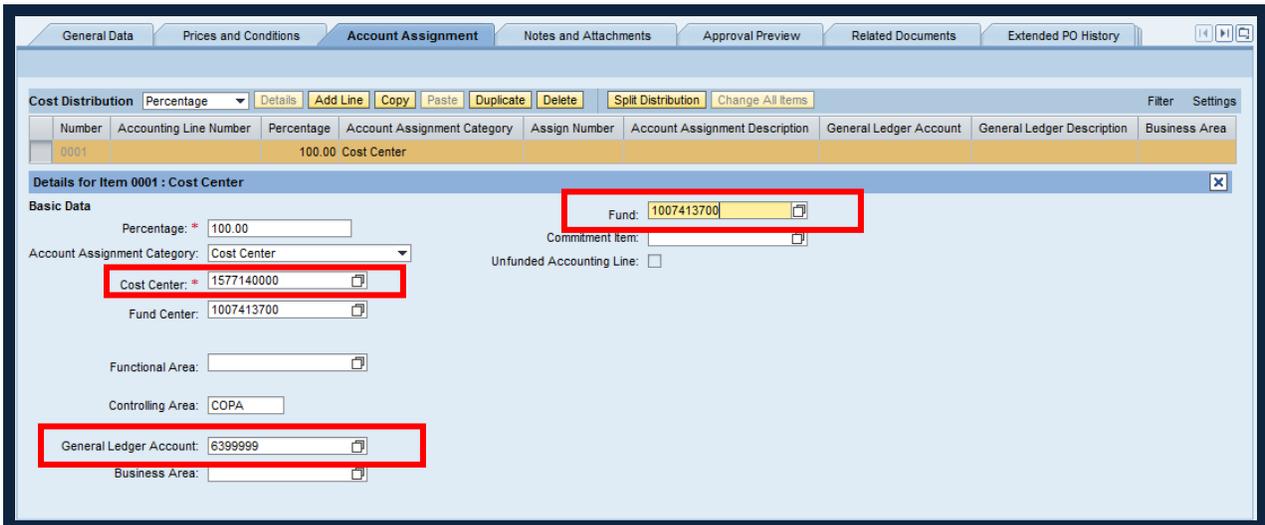
Cancelled:

11. Select the Account Assignment sub-tab. Select the DETAILS button to view the Account Assignment details.

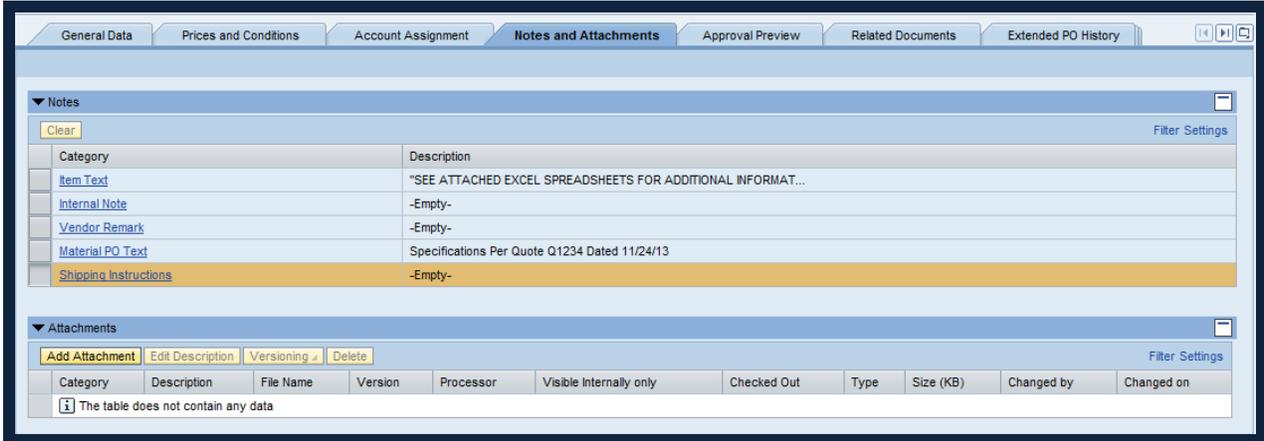
- Cost Distribution can be by Percentage, Quantity, or Value
- System allows for copying, pasting, and adding of additional line(s) of account assignments with the use of the action buttons



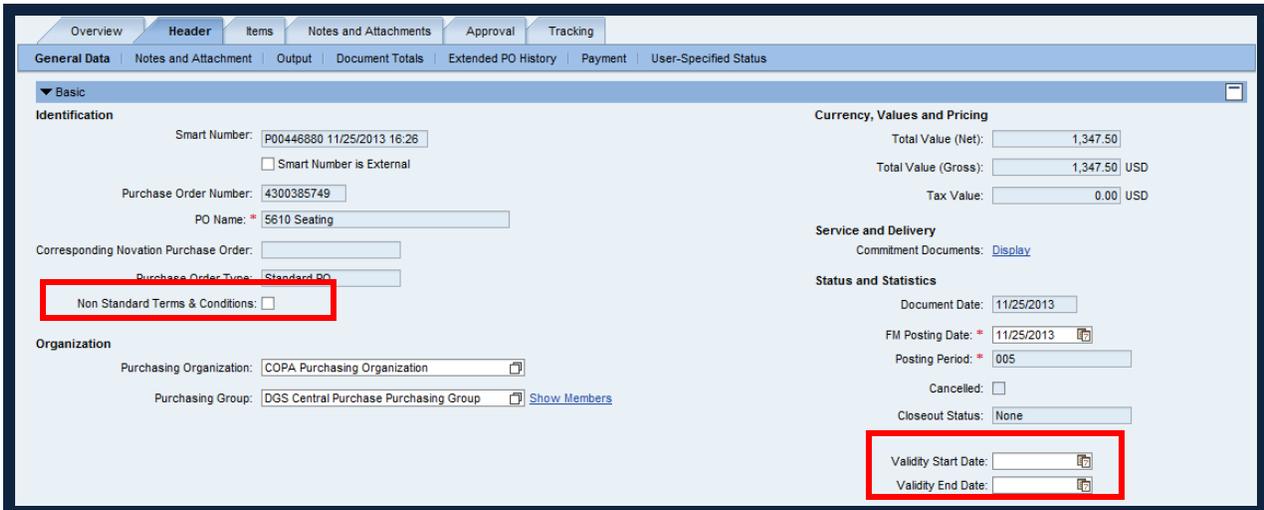
12. Enter the Cost Assignment information in the applicable fields for each line item. All other fields will default based on the information entered.



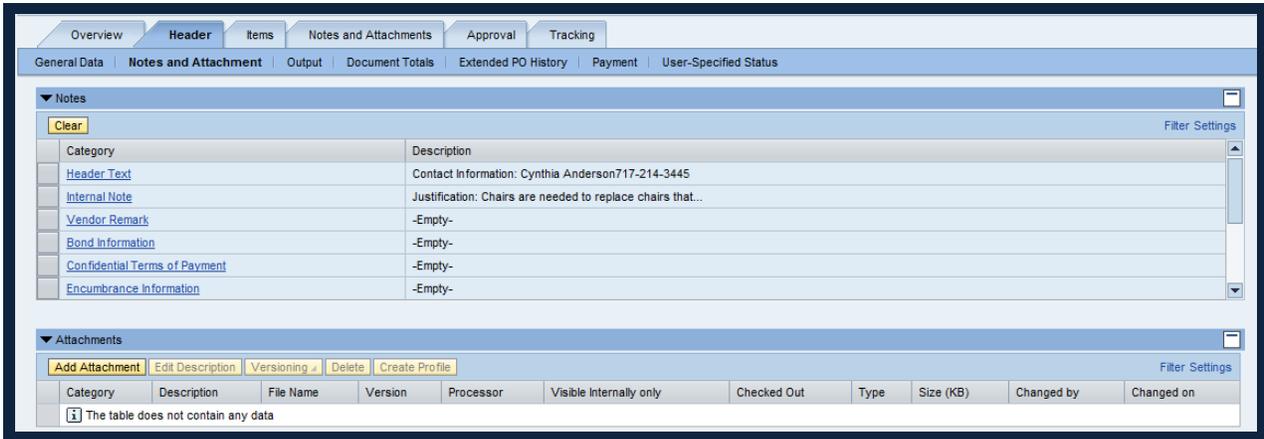
- 13. Select the Notes and Attachments sub-tab to enter text specific to the item. Text should be entered in the "Material PO Text" field. If the PO is against a Statewide Contract, text may default from the contract to the Item Text field. Read this text as it may be required to remain on the PO for the suppliers information, otherwise, it may be deleted from the PO. Enter shipping instructions when specific to the item.



- 14. Select the Header tab, this will open into the General Data sub-tab. Complete any applicable fields such as Validity Start Date and Validity End Date or the selection of the Non Standard Terms & Conditions checkbox (when non-standard terms & conditions were used).

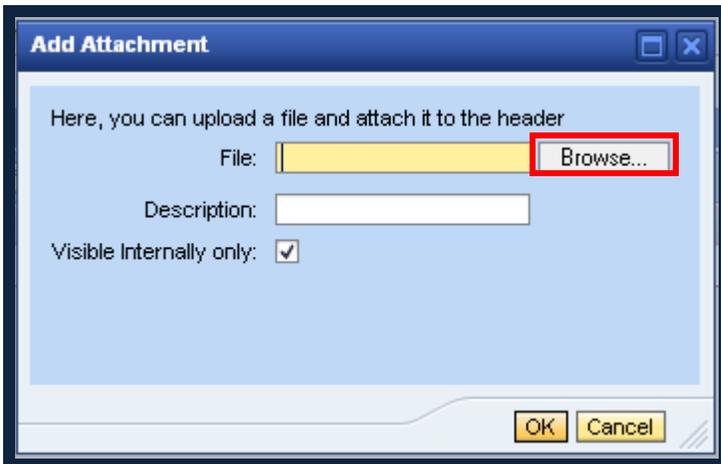


15. Select the Notes and Attachments sub-tab within the Header tab. Enter applicable text in the fields by selecting the appropriate text field link. Add attachments by selecting the ADD ATTACHMENTS button in the Attachments section.

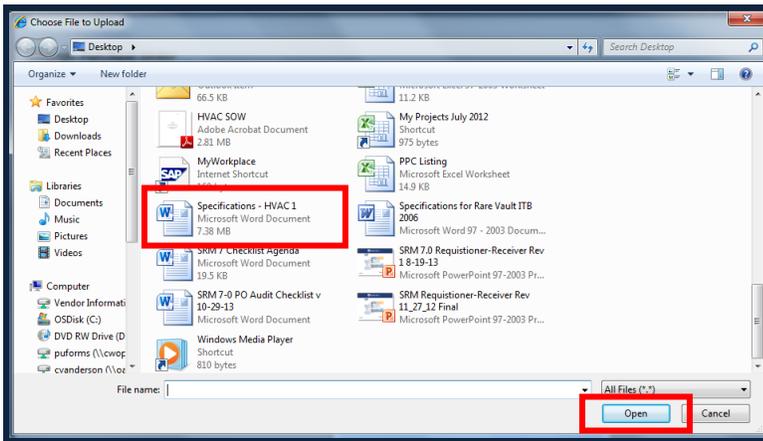


*NOTE: Do not use a "wildcard" (% , * , etc.) character in the title of your attachment. Also, be careful that your file name is not too long (40 character limit).*

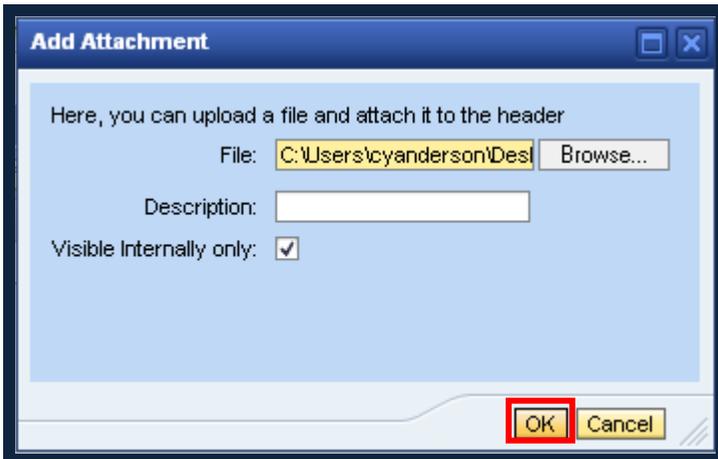
- a. To add attachments, select the BROWSE button.



b. Locate and select your file from your drive



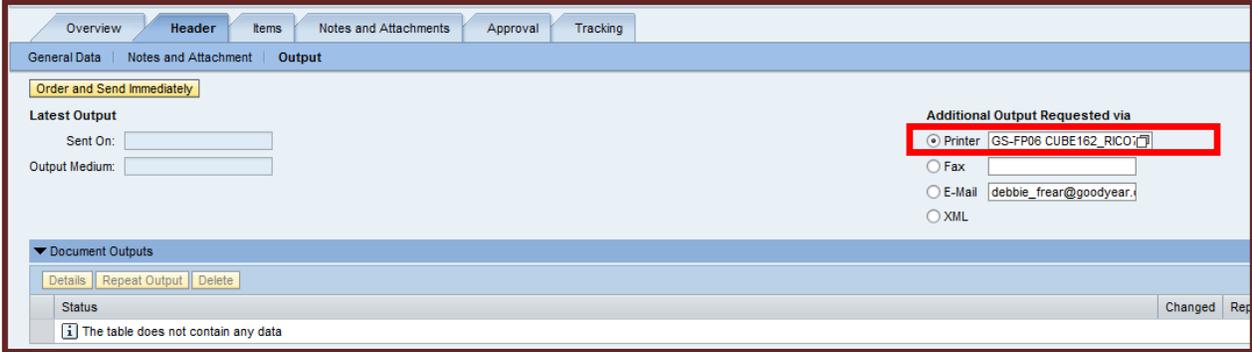
c. Your file path will display in the File field; select the OK button



d. Your attachment will display in the Attachment section of the Notes and Attachments sub-tab

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
Standard Attachment	Sales quote for Chair PO	Sales quote for Chair PO.docx	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	docx	33	P00446880	11/27/2013

16. Select the Output sub-tab in the Header tab. Select the match code to search for the printer, if the printer radio button is selected. If Fax, E-Mail, or XML is select, then you will not be printing a hard copy of the document. Instead the PO will be system-generated and you can print a hard copy after the initial print process has been done, if necessary.



- a. Enter the two-digit agency identifier followed by an asterisk (*)
- b. Select the START SEARCH button



- c. Once the printer is located, select the gray box to the left and select the OK button



Note: Only XML and Auto-POs are output automatically, all other Purchase Order Types must be output manually by Purchasers.

If approvals are required, the document cannot be output until all approvals are completed.

17. After all data entry in the PO has been completed, select the CHECK button to review and resolve any errors. If there are no errors or once the errors have been resolved, select the ORDER button to submit the PO for approval and ordering.

