



Completing and Placing the Order

To complete and place an order, SupplierConnect has many features. Often times you may use SupplierConnect to create and place a single supplier order. For purposes of demonstration only, this requestor has created an order with two suppliers, the screen below shows:

1. B & H Photo
2. CDW-G

Supplier / Line Item Details

B&H Photo-Video.com Corp [more info...](#) PO Number: To Be Assigned

Purchase Orders 1
420 Ninth Avenue, New York, NY 10001-2404 US
The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details.
The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 1, 2

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ZAC-STD-4 Compact Alloy Tripod more info...	A1ZACSTD4	EA	9.95	1 EA	9.95 USD
2 HandiPod Mini Tabletop Tripod more info...	CATA2	EA	6.49	1 EA	6.49 USD
Supplier subtotal					16.44 USD

CDWG [more info...](#) PO Number: To Be Assigned

Fulfillment Address 1
230 N. Milwaukee Ave., Vernon Hills, IL 60061 US
The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click this message for more details.
The following lines cannot be accessed on the supplier's website. Click this message for more details. Line(s): 3, 4

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
3 SanDisk Cruzer Micro USB flash drive 2 GB more info...	1395553	EA	9.72	1 EA	9.72 USD
4 Adesso 3 button Desktop Optical Mouse HC 3003UB more info...	1507517	EA	8.66	1 EA	8.66 USD
Supplier subtotal					18.38 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	Subtotal	34.82
	Shipping	0.00
	Handling	0.00
	Total	34.82 USD

A requestor could perform all the shipping, billing and accounting for both suppliers at the same time or the requestor could split the suppliers up into separate carts/requisitions by using the drop down menu selection “**Move to another cart**”.

If you choose to perform all basic ship/bill to and accounting information together, when the order is placed, separate purchase orders will automatically be sent to each company.

This guide will split the suppliers and treat them as individual carts/requisitions.

Steps:

1. Click the top box above the prices for one vendor
2. Use the drop down box to choose “move to another cart”

The screenshot shows the EProcurement System interface. At the top, it displays the user's name (John Cooker) and the current cart name (2010-02-04 jecooker 01). The main content area is divided into sections for different suppliers. The first section is for B&H Photo-Video.com Corp, showing two items: ZAC-STD-4 Compact Alloy Tripod and HandiPod Mini Tabletop Tripod. The second section is for CDWG, showing two items: SanDisk Cruzer Micro USB flash drive 2 GB and Adesso 3 button Desktop Optical Mouse HC 3003UB. A red callout box labeled "#1 Click the top box which then selects all items." points to the top box of the CDWG section. Another red callout box labeled "#2 Move to another cart. Click Go." points to the "Move to Another Cart" button in the B&H section. The bottom of the page shows a summary table with columns for Subtotal, Shipping, Handling, and Total, with values in USD.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ZAC-STD-4 Compact Alloy Tripod	AIZACSTD4	EA	9.95	1 EA	9.95 USD
2 HandiPod Mini Tabletop Tripod	CATA2	EA	6.49	1 EA	6.49 USD
Supplier subtotal					18.38 USD
Subtotal					34.82
Shipping					0.00
Handling					0.00
Total					34.82 USD

-After Step 2, “Move to another cart” has been clicked GO, a small window will open to confirm this decision. The “Select a cart” will already be populated with “Move to new cart”. Click “Move”. There will then be only one cart/requisition to work with.

The screenshot shows a Mozilla Firefox browser window displaying a dialog box titled "Move Lines". The dialog box contains the text "Please select the appropriate cart to which the selected line item(s) are to be moved." Below this text is a label "Select a cart:" followed by a dropdown menu that currently shows "Move to new cart". At the bottom of the dialog box are two buttons: "Move" and "Close". The browser's address bar shows the URL "https://solutions.sciquest.com/apps/Router/MoveReqLine?Param_LineItems=53916236".

Edit Screen:

The “Edit” screen is the starting point for preparing the cart/requisition for review and approval.

Edit Cart screen.

Required field: Account

Cart Name: 2010-02-04 jecooker 01

Supplier / Line Item Details

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
ZAC-STD-4 Compact Alloy Tripod	AIZACSTD4	EA	9.95	1 EA	9.95 USD
HandiPod Mini Tabletop Tripod	CATA2	EA	6.49	1 EA	6.49 USD
Supplier subtotal					16.44 USD

Subtotal: 16.44
Shipping: 0.00
Handling: 0.00
Total: 16.44 USD

On this screen you may give the cart another name. A suggestion is to name the cart the name of the supplier and a date. Ex. B & H 02-28-10. This will allow for easier lookup in future screens.

New Cart Name: B & H 02-28-10

Cart Name: B & H 02-28-10

Supplier / Line Item Details

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
ZAC-STD-4 Compact Alloy Tripod	AIZACSTD4	EA	9.95	1 EA	9.95 USD
HandiPod Mini Tabletop Tripod	CATA2	EA	6.49	1 EA	6.49 USD
Supplier subtotal					16.44 USD

Subtotal: 16.44
Shipping: 0.00
Handling: 0.00
Total: 16.44 USD

Edit Screen cont'd.

The requestor may choose to “Show Line Item Details.” This is demonstrated below.

The screenshot displays the 'Cart - Draft Requisition' interface. At the top, the user 'John Cooker' is logged in. The page title is 'Cart - Draft Requisition' and the total value is '2 item(s), 16.44 USD'. A navigation bar includes 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history', 'profile', and 'more >>'. Below the navigation, there are buttons for 'Create Cart', 'Add Products', 'Edit Cart', 'Review', 'PR Approvals', 'PO Preview', and 'Place Order'. A red error message 'Required field: Account' is highlighted in a yellow box. A callout box points to a 'Add to Favorites' button in the dropdown menu for the selected line items. The main content area shows 'Supplier / Line Item Details' for 'B&H Photo-Video.com Corp'. It lists two items:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ZAC-STD-4 Compact Alloy Tripod	AIZACSTD4	EA	9.95	1 EA	9.95 USD
2 HandiPod Mini Tabletop Tripod	CATA2	EA	6.49	1 EA	6.49 USD
Supplier subtotal					16.44 USD
Subtotal					16.44
Shipping					0.00
Handling					0.00
Total					16.44 USD

In this illustration, the requestor can see the manufacturer name, part number, commodity code, any internal/external notes, etc.

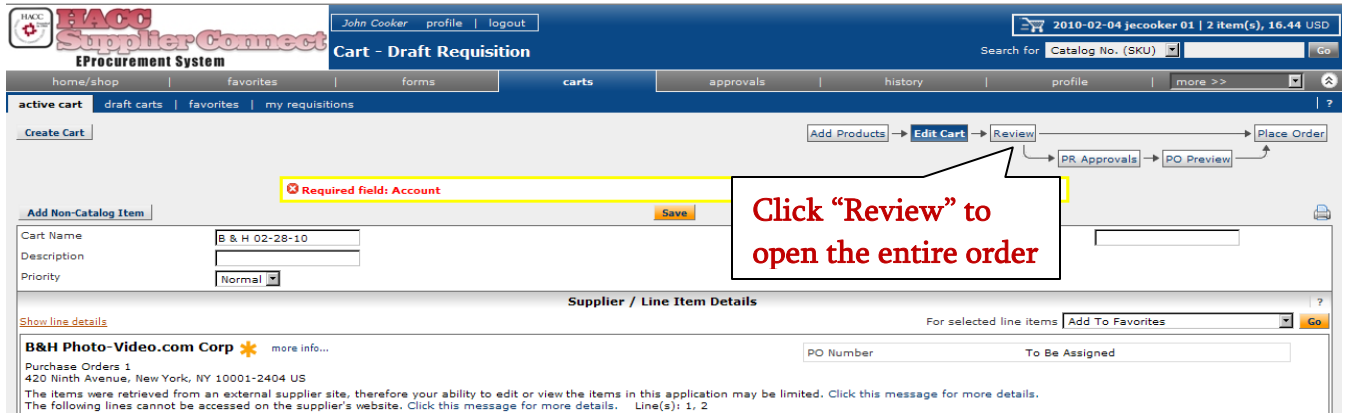
If the items that appear are correct, additional information may be added. In this illustration there is a field with a yellow border and with the words “Required field: Account” in red. This means that before this order can be completed, the requestor must provide the “account” number. When the error messages have been corrected, the order will be ready to place into the workflow for a purchase order.

Note: In the drop down, there are the words “Add to Favorites”. Selecting a particular item or all items and then selecting the function “Add to Favorites”, the items will be copied to the requestors SupplierConnect “favorites list” NOT the supplier B & H Photo favorites list. The purpose of this function is that a cart may be created from the requestors “Favorites”.

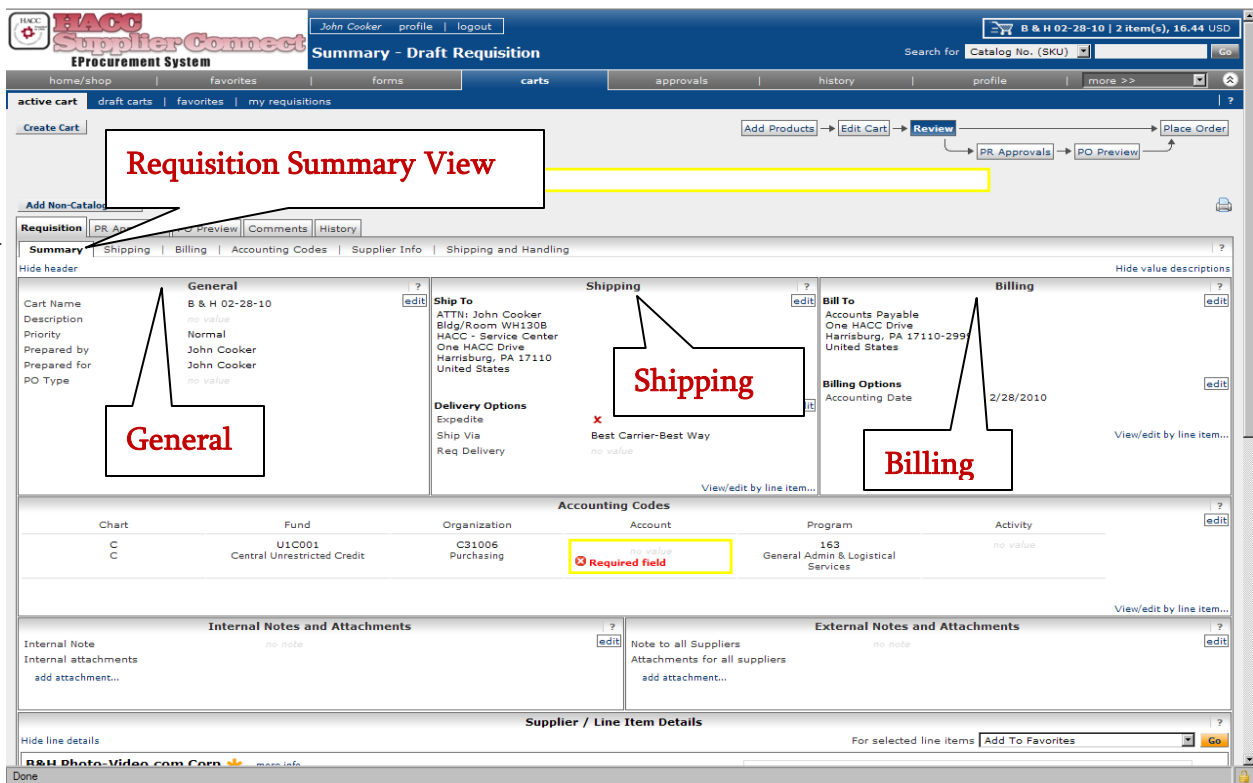
In the same drop down where “Add to Favorites” is located are other functions:

- Remove selected items
- Remove all items (empties the cart)
- Move to another cart (if you have multiple carts as illustrated above)
- Add to Draft Cart or Pending PR/PO (PR =Purchase Requisition/PO = Purchase Order.)

Review Screen:



Click the box “Review” on the flowchart at the top of the page. The “Review” screen is displayed.



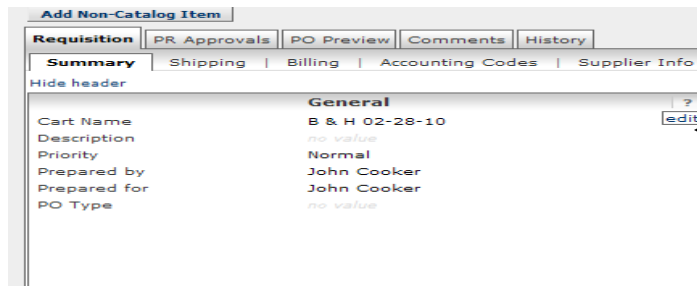
There are **FIVE** tabs and most have sub tabs. This view is the **Requisition – Summary** where much of the review and modifications take place.

Review Screen Description cont'd.

There are **THREE** large boxes: General, Shipping, and Billing.

General:

1. The cart name may be modified by clicking “edit”.
2. The requestor (prepared by) name is provided.



Add Non-Catalog Item

Requisition | PR Approvals | PO Preview | Comments | History

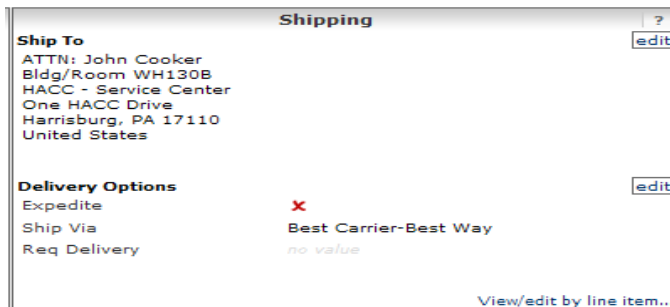
Summary | Shipping | Billing | Accounting Codes | Supplier Info

Hide header

General		?
Cart Name	B & H 02-28-10	edit
Description	no value	
Priority	Normal	
Prepared by	John Cooker	
Prepared for	John Cooker	
PO Type	no value	

Shipping:

The shipping information has been provided by the profile information defaults however “**Attn:**” and “**Bldg/Room**” may be changed by clicking “edit”.



Shipping

Ship To

ATTN: John Cooker
Bldg/Room WH130B
HACC - Service Center
One HACC Drive
Harrisburg, PA 17110
United States

Delivery Options

Expedite

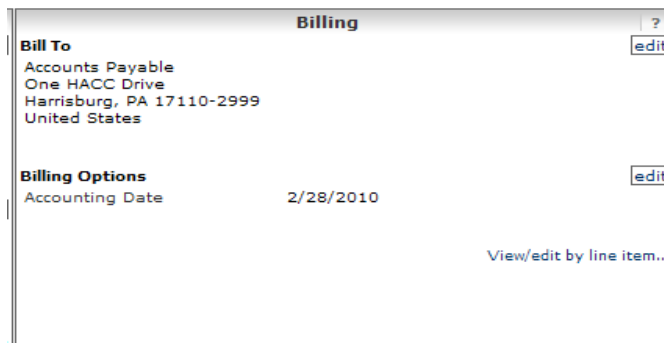
Ship Via **x** Best Carrier-Best Way

Req Delivery no value

View/edit by line item...

Billing:

The billing information has been provided by the profile information defaults, however, it should **ALWAYS** be **Accounts Payable**.



Billing

Bill To

Accounts Payable
One HACC Drive
Harrisburg, PA 17110-2999
United States

Billing Options

Accounting Date 2/28/2010

View/edit by line item...

Review Screen - Billing cont'd.

The Billing Options “Accounting Date” should be the date you are placing the order. For example, if you began the order several days prior and are just now placing it, the date will reflect the original date. It is recommended to change the accounting date to the date you place the order.

Billing

Bill To [edit](#)
Accounts Payable
One HACC Drive
Harrisburg, PA 17110-2999
United States

Billing Options [edit](#)
Accounting Date 2/28/2010

[View/edit by line item...](#)

Accounting Codes:

Summary - Draft Requisition

Required field: Account

FOAPAL information.

Click "Edit" to change accounts.

Chart	Fund	Organization	Account	Program
C	U1C001	C31006	Required field	163
C	Central Unrestricted Credit	Purchasing		General Admin & Logistic Services

In the illustration above, all the accounting information is filled in using defaults chosen in the user profile. If no defaults were chosen or the requestor needs to change the codes, follow these steps:

1. Click “EDIT” (at the far right). The screen below illustrates how to change or add accounting codes.

Accounting Codes cont'd.

The screenshot shows the 'Accounting Codes' form with fields for Chart (C), Fund (U1C001), Organization (C31006), Account (dropdown menu), Program (163), and Activity. The dropdown menu is open, showing a list of accounting codes: 730003 - Instructional Supplies, 730007 - Office Supplies, 740001 - Printing/Copying, 740012 - Purchasing Bid Advertising, 740999 - Other Purchased Services, 750201 - Equipment Rentals/Leases, 782001 - Conf Registration/Training Fee..., 782002 - Conf/Training Travel Expense, and 782003 - InState Travel Exp/Non Confere... An arrow points from the text below to the dropdown menu.

2. Click "Select from profile values"
3. If all the accounting values were added at the profile modification step they will appear under the FUND, ORG, ACCT, and PROGRAM.
4. Click on one of the values in the drop down and the value will be placed in the field as seen in the screen below.

The screenshot shows the 'Accounting Codes' form with the Account field now populated with '730007'. The dropdown menu is closed. An arrow points from the text above to the '730007' value in the Account field. Below the form are 'Save' and 'Cancel' buttons.

Split Accounting:

Two primary accounting splits are possible:

- Entire order
- By Line

An **entire order** may be split by: **% of price or % of quantity**. When the words "add split" is clicked, the screen below opens with two types of splits and two accounting lines.

Note: If more splits of the order are necessary, click the "add split" again until you have the proper number of lines.

% of price or % of quantity

The screenshot shows the 'Accounting Codes' form with two split lines. The first line has Chart (C), Fund (U1C001), Organization (C31006), Account (730007), Program (163), and Activity (163). The second line has Chart (C), Fund (U1C001), Organization (C31006), Account (730007), Program (163), and Activity (0). A dropdown menu is open over the first line's Activity field, showing options: '% of Price', '% of Price', and '% of Qty'. An arrow points from the text above to this dropdown menu. Below the form are 'Save' and 'Cancel' buttons, and a 'Total 0%' indicator.

Split Accounting cont'd.

Individual lines may have split accounting. In order to make splits to individual lines, the requestor must change from “**Requisition – Summary**” to “**Requisition – Accounting Codes.**”

The screenshot shows the 'Summary - Draft Requisition' page in the EProcurement System. The 'Accounting Codes' tab is selected. Two callout boxes are present: one pointing to the 'Summary' tab labeled 'Requisition Summary' and another pointing to the 'Accounting Codes' tab labeled 'Requisition Accounting Codes'.

Next instead of editing the “**Accounting Codes**” area, go to the “**Supplier/Line Item Details**” and click “**edit**” on the line item where the split needs to occur.

The screenshot shows the 'Accounting Codes - Draft Requisition' page. The 'Supplier / Line Item Details' section is visible, showing a list of items with an 'edit' button next to each. A callout box points to the 'edit' button with the text 'Click on Edit to do Line Item Accounting Split.'.

Chart	Fund	Organization	Account	Program	Activity
C	U1C001	C31006	730007	163	
C	Central Unrestricted Credit	Purchasing	Office Supplies	General Admin & Logistical Services	

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Price
1 ZAC-STD-4 Compact Alloy Tripod Accounting Codes (same as header)	AIZACSTD4	EA	9.95	1 EA	9.95 USD
2 HandiPod Mini Tabletop Tripod Accounting Codes (same as header)	CATA2	EA	6.49	1 EA	6.49 USD

Line Item Accounting Splits cont'd.

Line item splits may be done by:

- % of price
- % of quantity
- Amount of price
- Amount of quantity

The screenshot displays the 'Accounting Codes' interface. It features a table with columns for Chart, Fund, Organization, Account, Program, and Activity. Two rows are visible, each representing a split configuration. The first row has a dropdown menu open for the Activity column, showing options: '% of Price', '% of Qty', 'Amount of Price', and 'Amount of Qty'. The second row has a text input field in the Activity column containing the value '0'. To the right of each row is an 'add split' button and a 'remove' button. At the bottom right, there is a 'Total' section showing '0%' and a 'recalculate / validate values' button. At the bottom center, there are 'Save' and 'Cancel' buttons.

Chart	Fund	Organization	Account	Program	Activity	
C	U1C001	C31006		163	% of Price	add split
	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from all values...	remove
C	U1C001	C31006		163	0	remove
	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from profile values... Select from all values...	Select from all values...	

Total: 0%
recalculate / validate values

Save Cancel

Note: If more splits of the line is necessary, click the “add split” again until you have the proper number of accounting lines.

Internal and/or External Notes and Attachments FOR the “entire” Purchase Order:

The requestor may add internal and/or external notes, add attachments such as quotes, file and URL links.

Note: The “external notes” and/or “attachments” will print on the purchase order above the line items.

Internal Notes: Edit opens a box to make comments.

External Notes: Edit opens a box to make comments.

Add Attachments: Allows the selection of a file or a URL link. Click SAVE.

Add Attachments: Allows the selection of a file or a URL link. Click

Internal Note

Internal Note

Internal attachments

add attachment...

expand | clear

Save Cancel

Internal Note

External Info

Note to all Suppliers

Attachments for all suppliers

add attachment...

expand | clear

Save Cancel

External Note

Notes & Attachments Cont'd.

Internal Attachments:
File or URL

External Attachments:
File or URL

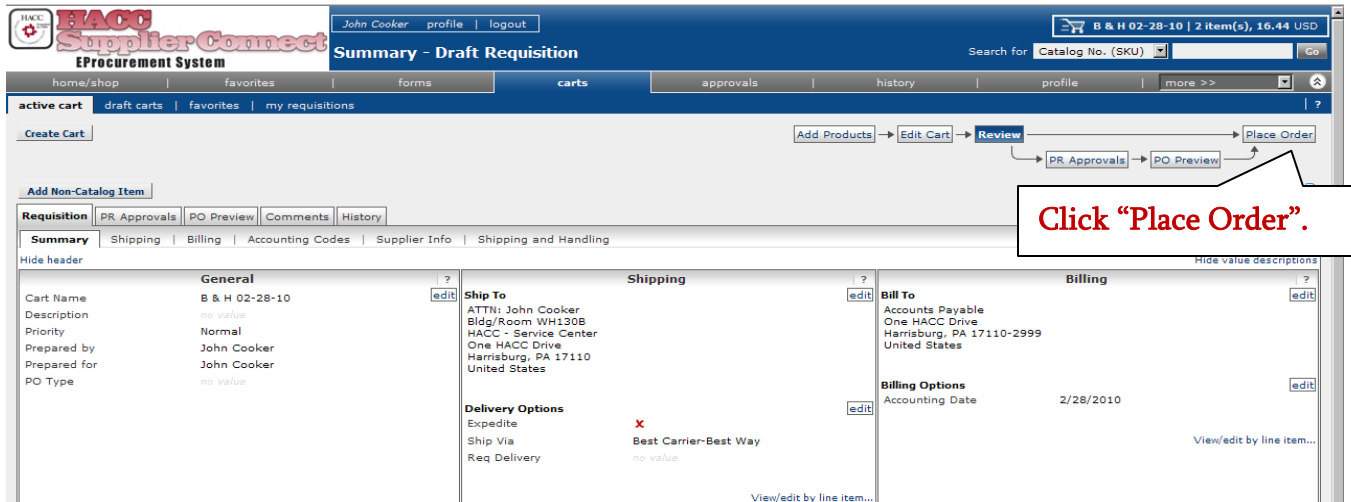
Internal and/or External Notes & Attachments at the "Line" level:

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 ZAC-STD-4 Compact Alloy Tripod	A1ZACSTD4	EA	9.95	1 EA	9.95 USD	edit
2 HandiPod Mini Tabletop Tripod	CATA2	EA	6.49	1 EA	6.49 USD	

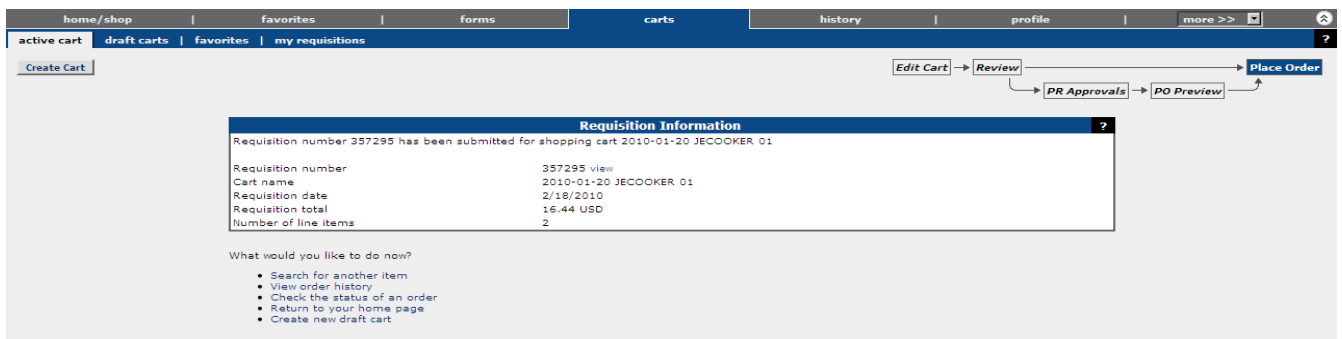
The box below is an illustration of how a requestor can add file or URL to the line.

PLACING THE ORDER:

If there are no error messages and the requestor has verified shipping, billing, accounting date, inserted any accounting splits, notes and or attachments, the cart is ready to proceed towards being an order.



Click the box “Place Order”. Once initiated, a new screen will appear. It is called the “Requisition Information”.



This completes **Completing and Placing the Order Guide**.

A requestor can go into the SupplierConnect system to:

- See the requisitions that they created
- View the status in the workflow
- See which approver hasn't approved the order
- View History after the approval was given
- Track the order through the individual vendor sites