



Shopping Cart: Create a BLPO Order

Use this Job Aid to:

- Learn how to create a Blanket PO through SAP (i.e., setting up a PO for a standing order).

BEFORE YOU BEGIN

You will need to know what you would like to order, the vendor, and the General Ledger (G/L) account to charge to.

Create a BLPO Order

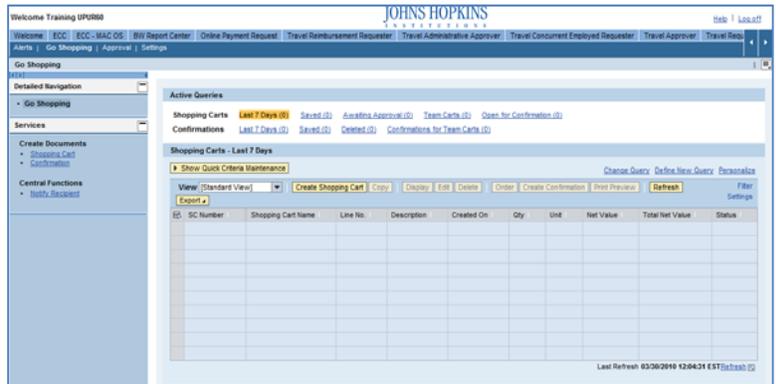
Use a BLPO (Blanket Purchase Order) when you need to procure goods or services with a not-to-exceed dollar limit within a specific time period. A BLPO shopping cart becomes a blanket purchase order, once approved. Some differences between a blanket purchase order and a standard purchase order include: you may not know the price per unit and the “required on date” is when the service is expected to end.

Each time you want to order from the blanket purchase order, you would call the vendor and request the necessary goods or services from the blanket purchase order. Each time a service is received and invoiced by the vendor, a confirmation is performed by the requestor for the dollar amount charged for that instance of the service. This in turn is decremented from the available funds assigned to the purchase order.

- Create a Cart.** At the Shopping Home Page, click “Create Shopping Cart.”

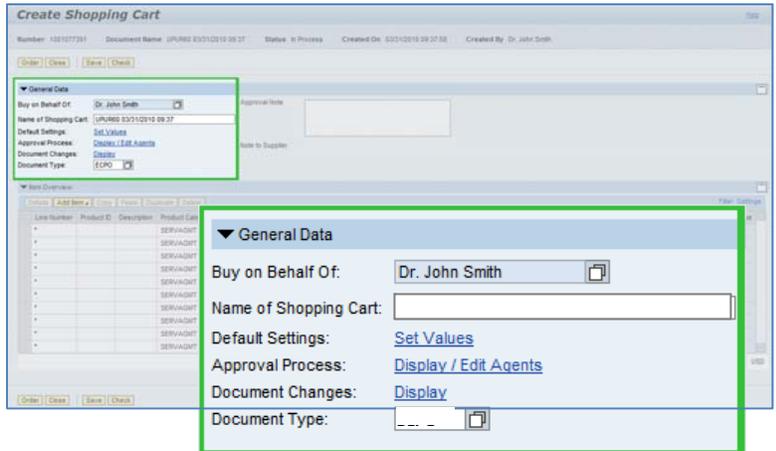
Helpful Hint

You may want to close the “Detailed Navigation” panel on the left side of the screen to give you more room. Do that by clicking on the small  in the top right corner of the panel.



- Enter General Data.** The “Create Shopping Cart” screen will appear. Start your order in the “General Data” section of this screen.

- You may wish to rename the cart to something that you will recognize and that will make it easier for you to locate the cart in the future. This sample cart is renamed “SAP Upgrade Consulting.”
- Click “Set Values” next to the label “**Default Settings**” to set the default values that will be carried throughout this cart. For example, you can set up the cost assignment and G/L number, split the cost distribution, and set up the product category for the cart here, and the default data will populate each line in the cart. Note that even after you set the default values, you can still change individual items within the cart to different values. This

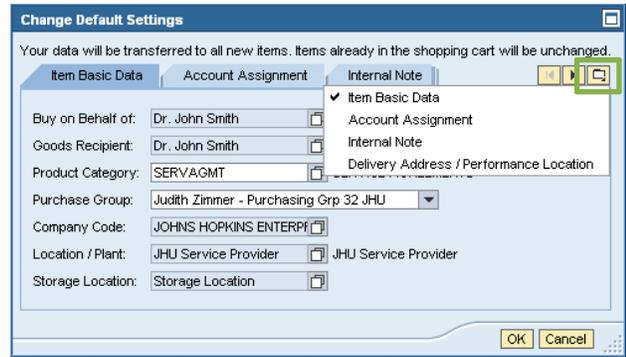


feature can be a great time-saver for carts with multiple lines.

- Select the document type for your order. In this case, we'll change it to BLPO.

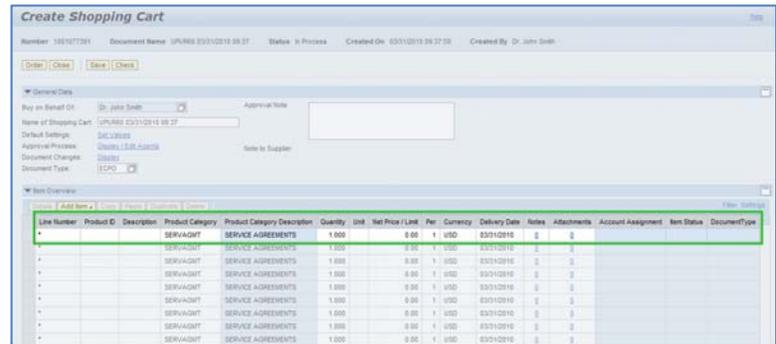
Helpful Hint

When the "Change Default Settings" dialog box appears, you won't see all of the tabs that are available to you. Either stretch the box horizontally so that all of the tabs appear, or just click on the white file folder to display a list of the available tabs.



3. Enter Item Data. Go to the first line in the order and start entering the order information. You'll work your way across the line for each item before you press Enter. Note that if you set up the default cart settings, much of this information will already be populated for you.

- Start with the "Description" field and enter text that identifies an activity or phase in the contract.



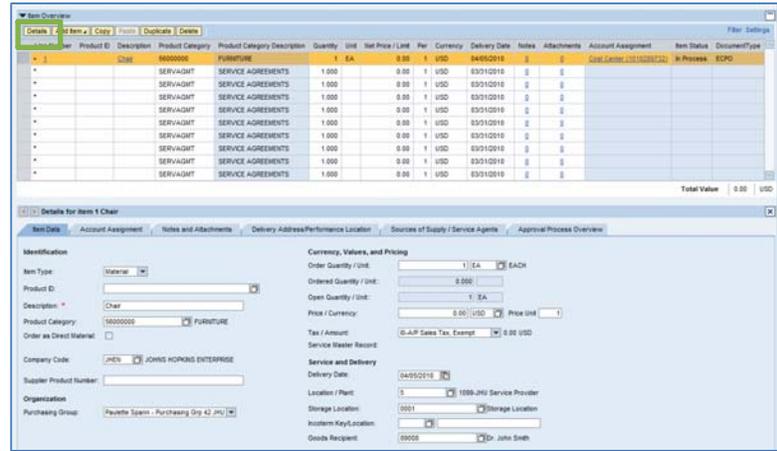
Line Number	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Per	Currency	Delivery Date	Notes	Attachments	Account Assignment	Item Status	DocumentType
*		SAP Upgr						1	USD	03/31/2010					

- Next enter the "Product Category."
- Enter the "Quantity." For BLPO carts, enter the total dollar value of the materials or services requested, or the total budgeted for the service.
- Enter DOL (for US dollars) in the "Unit" field.
- In the "Net Price/Limit" field enter 1.00. This allows the vendor to invoice you incrementally as services are provided.
- The "Delivery Date" is when the service is expected to end.
- Ignore the field that says "Per."
- When you are done, click "Enter" to apply your selections.

Helpful Hint

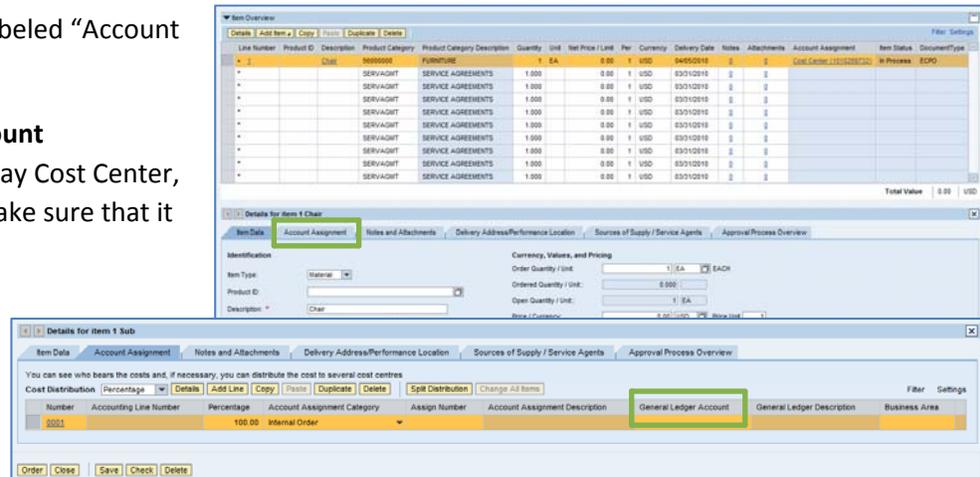
Don't forget to click "Enter" when you have completed the line. That's the only way to make the order details appear!

4. Item Details. After you click Enter, the “Details” button will become active. Click it to display the details for the first line in your order. The first tab “Item Data” will automatically be displayed.



5. Account Assignment. Click on the tab labeled “Account Assignment.”

- Check the cost object under the “**Account Assignment**” header (this field could say Cost Center, Internal Order, or WBS Element) to make sure that it is correct for your order.
- Click in the field under the header that says “**General Ledger Account.**” Verify the appropriate G/L account with your financial administrator, and then enter it in this field.



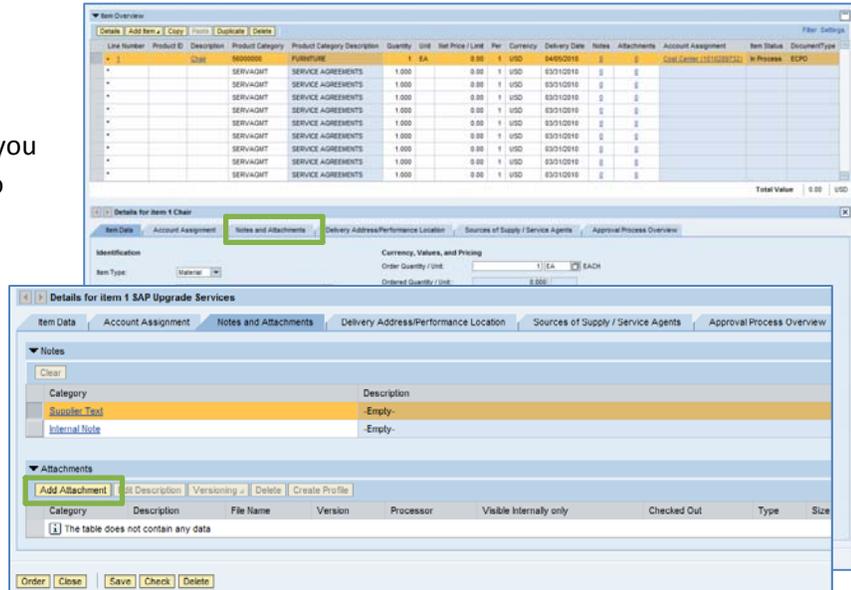
Helpful Hint

*You can expect to see errors at the top of the screen!
You will resolve them as you enter the details associated with this cart.*

Helpful Hint

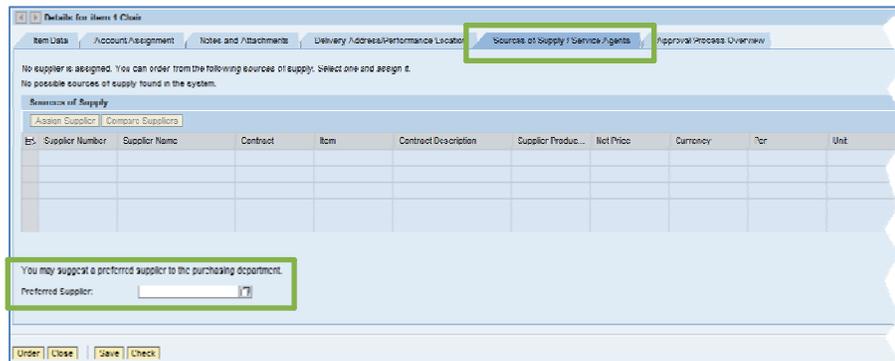
If you want to copy the G/L account number to all of the items in your cart, click “Copy” and “Change All Items” to apply the account number throughout the order.

6. Attach Required Documents. Click the “Notes and Attachments” tab to attached documents to the Shopping Cart. To attach documents, click the “Add Attachment” button. A pop-up window will prompt you to browse for the document(s) that you would like to attach.



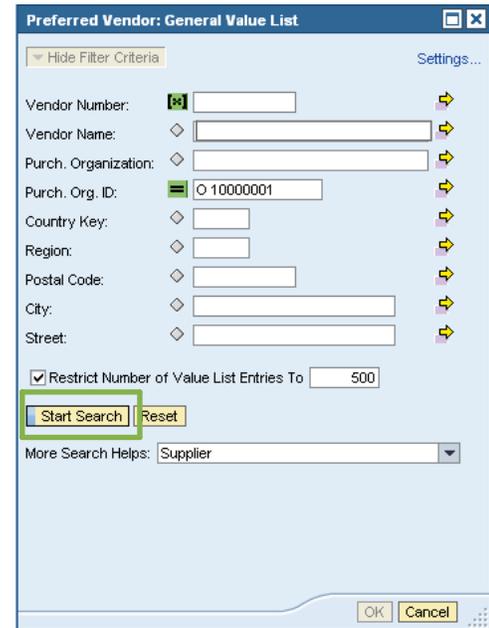
7. Select a Supplier. Next, click the tab labeled “Sources of Supply/Service Agents” (also under “Details”).

- If no sources appear, or if you prefer a different supplier, click in the “Preferred Supplier” at the bottom of the screen. To search for a supplier, select the file folder icon  to look it up in a list.



8. Search for the Vendor. When the search pop-up window appears, you may fill in any of the fields to search for your preferred vendor.

- The easiest way to search for a supplier is to enter the vendor’s name in the “Vendor Name” field, using wildcard characters both before and after the name. This will make sure you will be able to find the vendor even if the business name has additional words or characters before or after the main part that you recognize.
- After you’ve entered your search criteria, click “Start Search” to display a list of vendors.



9. Select the Supplier. In this case, just one supplier appears in the search list.

- Click the supplier name just once and the vendor data will be automatically populated in your cart.
- You can also click the gray box to the left of the vendor number, and then click **“OK”** to transfer the vendor information and return to the cart.

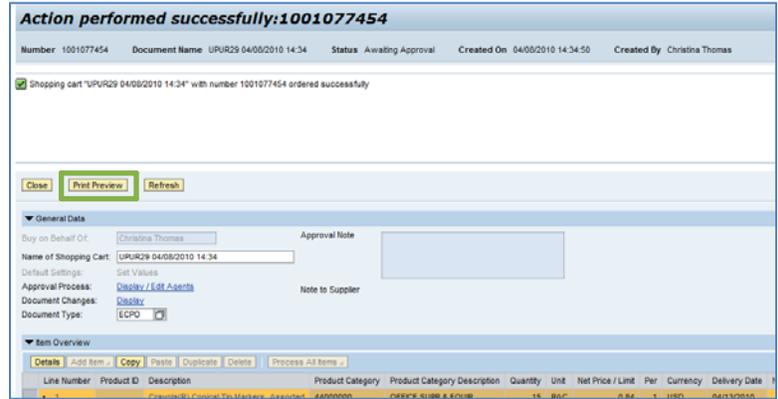
10. Check the Order. Your order is now complete. Click **“Check”** (either at the top or the bottom of the screen) to verify the order and make sure that no error messages appear at the top of the screen.

11. Place the Order. Once you have verified the order, click **“Order.”** You will see a message at the top of the screen that says **“Actions performed successfully.”**

In addition, you will see a message in the box at the top of the screen that says that the shopping cart was ordered successfully.

When your order is complete, click **“Close”** to return to the Shopping Cart Home Page.

12. Print Preview. The “Print Preview” button will appear once you have placed the order. Always print a copy of your order just in case there is a problem finding the shopping cart later.



13. Refresh! On the Shopping Cart Home Page, click “Refresh.” This is necessary to see the new order in your queue.

You’re all done! Your BLPO order has been successfully entered in SAP.



Always click “Refresh” when you get to the Shopping Cart Home Page to see your most recent orders. They will not appear until you have clicked “Refresh.”