Creating a PO through Shop OnLion

- ❖ Be sure you have updated your Default Delivery Address to your actual building location (instructions and location codes can be found at simba.psu.edu, Support Resources, Simulations and Guides, Procurement Courses, Personal Settings – Default Delivery Address Hands-On Guide & Shop OnLion Delivery Addresses)
- ❖ Find Vendor/Supplier number first (MUST be registered prior to processing)
    - Go to AP Display Tab in SIMBA
    - Go to Display Business Partner
    - Use little double boxes by Business Partner, can search by anything listed (does help to use * before and/or after what you are searching) or use Find Box on left hand side (can change Find* to other options
    - Select vendor/individual you want, write down Business Partner number
- ❖ In SIMBA, go to the Purchasing Tab, then click on Shop OnLion Tile
- ❖ A PO can be created one of two ways:
    - #1 - on Requisitioning Tab, click Shopping Cart
        - Complete Header section (Rename shopping cart to include your mnemonic at the beginning {EX: NUTR, SKK170}, click necessary boxes for Sole Source, After the Fact Order, etc…)
        - If you select Default Settings: Set Values, click Account Assignment – you can put detailed information in for your delivery address as well as apply the account assignment to each line item automatically. BE SURE TO VERIFY INFORMATION IS CORRECT FOR EACH ITEM USING THE ITEM OVERVIEW TABS.
        - Do not need to complete anything under ARL or ACO Approval
        - In Item Overview section, click Add Item, select With Free Description
            - Complete information on pop-up box:
                - Product Type will always be Material (if Service is selected, it will give you an error)
                - Description – enter what it is for ex: Consulting
                - Internal Note – add detailed information such as who the payment is for, what it's for, etc…
                - Product Category – this information can be found on the Product Category spreadsheet (on simba.psu.edu, Resources, Support Resources, SIMBA Resources, Procurement, Shop Onlion – Product Categories)
                - Enter Quantity/Unit – can search by clicking little double boxes and hit search, do not put in any search criteria, this will pull the entire list of options up
                - Enter Net Price per quanity/unit
                - Pick Delivery Date
                - Click Add to Item Overview
    - OR #2 – on Home Tab, click Shop
        - Click "Describe what you need"
            - Complete information on pop-up box:

        - Product Type will always be Material (if Service is selected, it will give you an error)
        - Description – enter what it is for ex: Consulting
        - Internal Note – add detailed information such as who the payment is for, what it's for, etc…
        - Product Category – this information can be found on the Product Category spreadsheet (on simba.psu.edu, Resources, Support Resources, SIMBA Resources, Procurement, Shop OnLion – Product Categories)
        - Enter Quantity/Unit – can search by clicking little double boxes and hit search, do not put in any search criteria, this will pull the entire list of options up
        - Enter Net Price per quantity/unit
        - Pick Delivery Date
        - Click OK
    - Complete Header section (Rename shopping cart to include your mnemonic at the beginning {EX: NUTR, SKK170}, click necessary boxes for Sole Source, After the Fact Order, etc…)
    - Do not need to complete anything under ARL or ACO Approval

- THE FOLLOWING STEPS WILL BE COMPLETED THE SAME NO MATTER WHICH WAY YOU ADDED THE ITEM TO THE SHOPPING CART
  - Highlight Line Item you want to edit (click on box at beginning of line), click Details
    - Item Data should have some of the information you had entered in the pop-up box
    - Account Assignment (will need to click Details again) – under Account Assignment Category, pick what Cost Object you are charging (either Cost Center or Order for Internal Order numbers) enter information in required box and verify General Ledger Account is correct-this does auto populate but please be sure to verify it is correct
      - If multiple items are on order, the account assignment should apply to all line items but be sure to verify that each line item does have an account assignment
      - If Cost Center or IO & GL do not carry over, you can copy the details from item 1 and paste it onto the other line items
    - Notes and Attachments – add any necessary attachments such as quotes, invoices, Sole Source Justifications, etc…
    - Delivery Address/Performance Location – enter your phone number, Floor/Room number and complete the C/O line if necessary. The Building location should be your actual building
    - Sources of Supply/Service Agents – if you have a specific supplier/vendor, you will put their Business Partner number in the box by Preferred Supplier and click Display to verify the number is correct (it will populate the vendor name)
    - Approval Process Overview – will show where the cart will go during the approval process

- Once everything is complete, click Check to verify there are no errors. Anything with a red exclamation point will need to be corrected prior to submitting. Anything with a yellow sign, is a warning but can be submitted.
- You can either save the shopping cart to come back to later or you can click Order to put the shopping cart through the approval process.
- To view where in the approval process the cart is after it is submitted, you would go to your Home Tab and click Shopping Area. This will have your shopping carts. Select the one you'd like to look at, click Display. You can click "Display/Edit Agents" in the header section or you can use the Approval Process Overview tab in the Details section.

****For any free text orders (non-catalog) or catalog orders over $5,000, a Goods Confirmation will need to be completed once the items/service(s) have been received. <u>You will not receive an email to confirm these PO's, they are encouraging individuals to be proactive to complete this step once they receive the items/service(s).****</u>

Please follow the below steps to complete a goods confirmation

- In SIMBA, go to the Shop OnLion tile
- In Shop OnLion, click the Requisitioning tab
- Click Confirmation under Create Documents
- You do not need to enter any specific information unless you want to confirm a specific cart/PO, here you can just hit Search. It will pull up any carts/PO's that you have to confirm
- Select your line item that you'd like to confirm
- Hit Continue at top
- You can add the PO number in the Reference Document but it is not required
- In the Confirm Quantity column, type how many items you are confirming ****This will be how many you actually received, if you ordered 10 and only received 5 you would put 5 because you did not receive all 10 yet****
- If this is the final delivery and you/the company are not expecting to use this PO for any other invoices, you can put a check mark in Last Delivery. ***Important, this **will not** close out the PO! If you want to completely close out the PO you must complete a POCF and send to Purchasing.