**<u>Creating a PO through Shop OnLion</u>**

**Update Default Delivery Address to your actual building location (instructions and location codes - [KB Article - Manage your Default Delivery Address]())

- ❖ Find Vendor/Supplier number first (MUST be registered prior to processing)
    - Go to AP Display Tab in SIMBA
    - Go to Display Business Partner
    - Use double windowpane by Business Partner - can search by anything listed or use Find Box on left hand side (does help to use * before and/or after when searching)
    - 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 - Requisitioning Tab, click Requisitioning, 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 – can add budget on Account Assignment & add information on Delivery Address, this will apply to each line item automatically. <u>BE SURE TO VERIFY INFORMATION IS CORRECT FOR EACH ITEM USING THE ITEM OVERVIEW TABS.</u>
        - 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 ex: Consulting
                - Internal Note – add detailed information (5 W's – who, what, when, why, where)
                - Product Category – this information can be found on the Product Category spreadsheet (on simba.psu.edu, Training & Resources, Procurement (Shop Onlion), Product Category Codes (left side)
                - Enter Quantity/Unit – can search by clicking 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 - this does not need to be changed unless you need the item sooner
                - Click Add to Item Overview
        - Highlight Line Item #1 (click on box at beginning of line), click Details *go through each tab to verify information is complete/correct*
        - Item Data should have some of the information you had entered in the pop-up box
        - Account Assignment (will need to click Details again by Percentage) –

            - If Default Setting Value did not hold - Pick what Cost Object you are charging (either Cost Center or Order for IO numbers) enter information in required box
            - Verify General Ledger Account is correct - this does auto populate but be sure to verify it is correct
        - 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 – Put Business Partner number in the box by Preferred Supplier and click hit Enter 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

- **OR #2 – on Home Tab, click Shop**
    - **STEP 1 of 3 -** 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 ex: Consulting
            - Internal Note – add detailed information (5 W's – who, what, when, why, where)
            - Product Category – this information can be found on the Product Category spreadsheet (on simba.psu.edu, Training & Resources, Procurement (Shop Onlion), Product Category Codes (left side)
            - Enter Quantity/Unit – can search by clicking 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 - this does not need to be changed unless you need the item sooner
            - Click OK
    - **STEP 2 of 3 -** Highlight Line Item #1 (click on box at beginning of line), click Details *go through each tab to verify information is complete/correct*
    - Item Data should have some of the information you had entered in the pop-up box
    - Account Assignment (will need to click Details again by Percentage) –
        - If Default Setting Value did not hold - Pick what Cost Object you are charging (either Cost Center or Order for IO numbers) enter information in required box

        - Verify General Ledger Account is correct - this does auto populate but be sure to verify it is correct
    - 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 – Put Business Partner number in the box by Preferred Supplier and click hit Enter 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
    - **STEP 3 of 3 -** Complete Header section in (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

**This is the same for each option above**

- 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 save the shopping cart to come back to later or click Order to put the shopping cart through the approval process.
- To view the approval process after the cart is submitted, go to your Home Tab and click Shopping Area. Click REFRESH and open carts will display. Click the blue link of the one you want to review. Click "Display/Edit Agents" in the header 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. 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).****

Please follow the below steps to complete a Goods Confirmation

- Go into Shop OnLion
- Click the Requisitioning tab
- Click Confirmation under Create Documents
- To find a specific Purchase Order or Shopping Cart, enter the number and click Search. To see all Purchase Orders that you have authorization to enter a confirmation on, click Search with all criteria fields empty
- Select a Purchase Order, select a line and click Continue
- Add PO number in the Reference Document

- In the Confirm Quantity column, enter 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 last expected delivery for the line or if all the items have been received, mark the Last Delivery box to signify that the line item has received all of the items. ***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 your Finance Office department contact.