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## PO.020.800 - Add-Maintain Locations & Ship To Locations

#### Trigger:

#### Concept

This topic demonstrates how to add and maintain Ship To Locations used on Requisition & Purchase Order documents to specify where vendors are to ship ordered goods.

The Ship To Location refers to a physical address where goods will be shipped such as a 'Central Receiving' area. For institutions using Desktop Receiving, however, the Ship To Location could reflect the address of the originating Requester's office or an administrative office serving the Requester's department.

Like Locations, Ship To Locations are identified by a Ship To Location description and a SetID. Ship To Locations intended for use with SciQuest orders require a specific format. The format will be outlined within this business process.

**Note**

**Any institution implementing SciQuest, will need to take one of the following actions:**

a) Update existing Locations & Ship To Locations (at a minimum, a Central Ship To Location if not using Desktop Receiving), or

b) Create new Locations & Ship To Locations for all physical addresses where shipments are to be received if implementing Desktop Receiving.

**For all institutions using eProcurement / SciQuest:** It is necessary that all required fields be appropriately populated within any Location intended for use as a ShipTo on purchasing documents (Contract or Special Request Requisitions) where a 'SHARE' Catalog Vendor is used.

The format of this information is extremely important to ensure successful integration with and dispatching via SciQuest.

**Topic Objectives:**

Upon completion of this topic, you will be able to:

- Add or Update an existing Location/Ship To Location for use with Special Requests only

- Add or Update a Location/Ship To Location formatted for integration with SciQuest Requests

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

In this scenario we will first **create** a **Location** for the Continuing Education Department with a code of 'CE-DEPT'. Once we have created the **Location** which contains the physical address of the department, a **Ship To Location Code** can be created which references the corresponding Location.

The second scenario details how to **update** an existing **Location** and corresponding **Ship To Location**.

The third scenario details the required format for a Location Code that will be used as a Ship To Locations for SciQuest Requisition and Purchase Order documents.

| Step | Action |
| --- | --- |
|  | Click the **Set Up Financials/Supply Chain** link.  Action area of the screen image |
|  | Click the **Common Definitions** link.  Action area of the screen image |
|  | Prior to creating a "Ship To Location Code", a Location must be created. The "Ship To Location Code" actually references the corresponding Location for the physical address data.  Click the **Location** link.  Action area of the screen image |
|  | **Decision:**Please make a selection from the options listed below.   * Create new Location & corresponding Ship To Location   Go to step 5 on page 3   * Maintain Existing Locations and/or Ship To Locations   Go to step 39 on page 5   * SciQuest Location required format   Go to step 64 on page 7 |
|  | On the **Add a New Value** tab, enter "**CE-DEPT**" in the **Location Code** field. |
|  | Click the **Add** button.  Action area of the screen image |
|  | Enter "**Continuing Education Dept**" in the **Descr** field. |
|  | Enter "**Kennesaw State University**" in the **Address 1** field. |
|  | Enter "**3333 Busbee Drive**" in the **Address 2** field. |
|  | Enter "**KSU Center - Building 33**" in the **Address 3** field. |
|  | Enter "**Kennesaw**" in the **In City Limit** field. |
|  | This field will be renamed to indicate that it can be used for populating the County or a Building Name/Number.  It is important to note that, if the Location will be used as a Ship To Location on SciQuest Purchasing documents, this field is mapped and printed on the resulting Purchase Order as a building identifier. The field can also remain blank if the building is clearly identified within the Address lines 1-3.  For this scenario, we will populate it with the County name.  Enter "**Cobb**" in the **County** field. |
|  | Enter "**30144-5591**" in the **Postal** field. |
|  | Enter "**GA**" in the **State** field. |
|  | Click the **In City Limit** checkbox.  Action area of the screen image |
|  | Enter "**1**" in the **Floor #** field. |
|  | Click the **Location Detail** tab.  Action area of the screen image |
|  | Enter "**John Miller**" in the **Attention** field. |
|  | Click the **Save** button.  Action area of the screen image |
|  | If this physical Location is a location where deliveries are expected, a "Ship To Location" is required.  For this scenario, we'll create a "Ship To Location Code" for use on Requisition and Purchasing Documents that references the physical location within the new 'CE-DEPT' Location Code. |
|  | Click the **Product Related** link.  Action area of the screen image |
|  | Click the **Procurement Options** link.  Action area of the screen image |
|  | Click the **Purchasing** link.  Action area of the screen image |
|  | Click the **Ship To Locations** link.  Action area of the screen image |
|  | Click the **Add a New Value** tab.  Action area of the screen image |
|  | Enter "**43000**" in the **SetID** field.  Your assigned BU will typically default in. |
|  | Enter "**CE**" in the **Ship To Location** field. |
|  | Click the **Look up Ship To Location (Alt+5)** button.  Action area of the screen image |
|  | As you can see, the Location Code we created which contains the physical address for the Continuing Education Dept is available for selection.  Click an entry in the **Location Code** column.  Action area of the screen image |
|  | Click the **Add** button.  Action area of the screen image |
|  | Click the **Sales/Use Tax** link.  Action area of the screen image |
|  | Click the **Exempt** list item.  Action area of the screen image |
|  | Click the **Exempt** list item.  Action area of the screen image |
|  | Click the **Sales/Use Tax Applicability** list item.  Action area of the screen image |
|  | Click the **Exempt** list item.  Action area of the screen image |
|  | Click the **Save** button.  Action area of the screen image |
|  | Click the **OK** button.  Action area of the screen image |
|  | Congratulations, you have completed the **Adding - Maintaining Ship To Locations** topic!  **End of Procedure.** Remaining steps apply to other paths. |
|  | First, we will update information within an existing **Location Code**.  On the **Find an Existing Value** tab, click the **Search** button to search for and select the **Location Code** you wish to update.  Action area of the screen image |
|  | You can also filter your search results by specifying a status here.  Click the **Status of as of Effective Date** list.  Action area of the screen image |
|  | Click the **Active** list item.  Action area of the screen image |
|  | Click the **Search** button.  Action area of the screen image |
|  | If you intend to update a Location Code, you must select the 'Correct History' checkbox.  If you are not sure an update is necessary, you will have an opportunity to enter Correction Mode later. |
|  | If you know all or part of the Location Code, use the Location Code field to search.  Enter "**BURR**" in the **Location Code** field. |
|  | Click the **Search** button.  Action area of the screen image |
|  | Click the **Location Code**.  Action area of the screen image |
|  | If you retrieved the Location Code without selecting the 'Correct History' checkbox and wish to make changes, you can select the 'Correct History' pushbutton below. |
|  | Enter "**2**" in the **Floor #** field. |
|  | The Sector Field should indicate a room number.  Enter "**220**" in the **Sector** field. |
|  | Click the **Location Detail** tab.  Action area of the screen image |
|  | Enter "**John Smith**" in the **Attention** field. |
|  | Click the **Save** button.  Action area of the screen image |
|  | This completes the update to a Location Code. Now we will navigate to the corresponding Ship To Location to see if any updates need to be made there. |
|  | Click the **Product Related** link.  Action area of the screen image |
|  | Click the **Procurement Options** link.  Action area of the screen image |
|  | Click the **Purchasing** link.  Action area of the screen image |
|  | Click the **Ship To Locations** link.  Action area of the screen image |
|  | Enter "**43000**" in the **SetID** field. |
|  | Enter "**BURR**" in the **Ship To Location** field. |
|  | If you intend to make changes, Correction Mode is required. If not selected here, you will have an opportunity to select 'Correct History' on the next panel. |
|  | Click the **Search** button.  Action area of the screen image |
|  | Click an entry in the **Ship To Location** column.  Action area of the screen image |
|  | If there is a need to update information on the corresponding Ship To Location, the changes would be made here. As you can see, all components of the physical address that is referenced when this Ship To Location is populated on a Requisition or Purchase Order document are stored and maintained within the Location Code.  Go to step 4 on page 3 |
|  | In this scenario, we are going to review the required format for a Location Code that will be used as a Ship To Locations for SciQuest Requisition and Purchase Order documents.  Click the **Set Up Financials/Supply Chain** link.  Action area of the screen image |
|  | Click the **Common Definitions** link.  Action area of the screen image |
|  | Click the **Location** link.  Action area of the screen image |
|  | Click the **Location** link.  Action area of the screen image |
|  | The SetID field should default to the SetID the user is affiliated with.  Enter "**43000**" in the **SetID** field. |
|  | Enter "**BU**" in the **Location Code** field. |
|  | Click the **Search** button.  Action area of the screen image |
|  | Click an entry in the **Location Code** column.  Action area of the screen image |
|  | The following slides outline each required field for all Locations referenced by a ShipTo Code used on SciQuest purchasing documents. |
|  | Population of the **Address 1** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **The 'Address 1' field must be populated with the University/College Name.**    Click in the **Address 1** field.  Action area of the screen image |
|  | Population of the '**Address 2**' field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the Address 2 field with the Street Address of the delivery location.**  Click in the **Address 2** field.  Action area of the screen image |
|  | Population of the **Address 3** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'Address 3' field with any additional street address information for delivery.**  **This field can be used to identify street address information or to identify a building name/number.**  Click in the **Address 3** field.  Action area of the screen image |
|  | Population of the **City** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'City' field with the name of the delivery city.**  Click in the **In City Limit** field.  Action area of the screen image |
|  | In the **County** field, enter either the **County** or **Building Number**.  Click in the **County** field.  Action area of the screen image |
|  | Population of the **State** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'State' field with the appropriate State abbreviation (ex. GA)**  Click in the **Look up (Alt+5)** field.  Action area of the screen image |
|  | The Building # field will not populate on SciQuest related documents.  **Do not** populate this field.  Click in the **Building #** field.  Action area of the screen image |
|  | Press **[Delete]**. |
|  | Population of the **Floor** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'Floor' field with corresponding building number for the delivery address.**  Click in the **Floor #** field.  Action area of the screen image |
|  | Population of the **Sector** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'Sector' field with the corresponding room number for the delivery address.**  Click in the **Sector** field.  Action area of the screen image |
|  | Population of the **Postal** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'Postal' field with the appropriate zip code for the delivery address.**  Click in the **Lookup** field.  Action area of the screen image |
|  | Click the **Location Detail** tab.  Action area of the screen image |
|  | Population of the **Attention** field is required for any Location/Ship To Location to be used on SciQuest transactions.  **Populate the 'Attention' field with the Requester's name or the person responsible for receiving goods at this delivery address.**  Click in the **Attention** field.  Action area of the screen image |
|  | Congratulations, you have completed the **Adding - Maintaining Ship To Locations** topic!  **End of Procedure.** |