

Hot Sheet



Topic	Unit of Measure and Specification Fields on PO Line Items
Document Types Involved	Bid <input type="checkbox"/> Master Blanket <input checked="" type="checkbox"/> Requisition <input checked="" type="checkbox"/> PO <input checked="" type="checkbox"/> Receipt <input type="checkbox"/> Invoice <input type="checkbox"/> Credit Memo <input type="checkbox"/> Report <input type="checkbox"/> Vendor <input type="checkbox"/> User Profile <input type="checkbox"/> Agency Setup <input type="checkbox"/> Other <input type="checkbox"/>
Reason for Publication	<p>AFIS has strict rules on what information must and must not be present in a purchase order (PO) line item. Every line item on a purchase order must have a valid unit of measure (UOM).</p> <ul style="list-style-type: none"> • The UOM cannot be left blank. • The data in the UOM field on the PO line item must match an existing ProcureAZ UOM (punchout vendors' UOM do not always match existing ones) • The UOM code on the PO line item must match an existing UOM in AFIS. • Documents affected are Release POs, Open Market POs and Direct Open Market POs. <p>The Specification fields (Manufacturer, Brand, Model, Make, Packaging and Property Number) may only contain information for Commodity (Goods) line items. If users enter information into those fields for service line items, their PO will generate an error when trying to send it to the vendor.</p> <ul style="list-style-type: none"> • Service line items have NIGP codes in the 900 series. • Line items with NIGP codes in the 900 series will generate an error on send to vendor if the Manufacturer, Brand, Model, Make, Packaging and Property Number fields contain information. • Documents affected are Release POs, Open Market POs and Direct Open Market POs. <p>Master Blanket POs with line items violating these conditions will force the creation of Release POs violating these conditions.</p> <ul style="list-style-type: none"> • The Master Blanket Purchaser (contract manager) must create or amend line items to have a valid UOM. • The Master Blanket Purchaser (contract manager) must not enter information into the Specification fields (Manufacturer, Brand, Model, Make and Packaging) for service line items (line items with NIGP codes in the 900 series), or they must amend any Master Blanket PO service line items so those fields are blank.

Steps Resulting in Scenario	<ol style="list-style-type: none"> 1. A user adds an item to a requisition with no unit of measure or a unit of measure not present in the UOM AFIS table. 2. The requisition is approved and converted to an approved PO in Ready to Send status. 3. When sending the PO to the vendor the user receives the error “Exception occurred trying to send the PO. Cause: ; The Unit Measure does not exist on the Unit Measurement Table.” <div data-bbox="426 289 478 349"> </div> <ul style="list-style-type: none"> • When sending the PO to the vendor the user receives the error “Exception occurred trying to send the PO. Cause: ; The Unit Measure does not exist on the Unit Measurement Table.” • The error message repeats for each line item on the PO with the error. <hr/> <ol style="list-style-type: none"> 1. A user adds a service item to a requisition. 2. The service item’s NIGP code is in the 900 series. 3. The Specification fields (Manufacturer, Brand, Model, Make, Packaging and/or Property Number) contain information. 4. The requisition is approved and converted to an approved PO in Ready to Send status. <div data-bbox="426 621 478 682"> </div> <ul style="list-style-type: none"> • When sending the PO to the vendor the user receives the error “Exception occurred trying to send the PO. Cause: ; The document could not be submitted due to errors.; No values may be entered on any Specifications fields when The Line Type is Service.” • The error message repeats for each item on the PO with the error
Recommended Strategy	<ol style="list-style-type: none"> 1. Be sure each line item on a requisition has a valid UOM. <ul style="list-style-type: none"> • If the UOM field is blank UOM or has a two-letter code but no description and the document is a release contact the Purchaser (contract manager) to update the line item(s). • If the UOM field is blank or has a two-letter code but no description and the document is a <u>punchout</u> contact the ProcureAZ Help Desk at 602-542-7600. 2. Check service line items Specification fields to be sure they are blank. <ul style="list-style-type: none"> • Service line items have NIGP codes in the 900 series. • If the document is a release contact the Purchaser (contract manager) to update the line item(s).
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Screenshots

2. Correct Unit of Measure Contents:

- | Item # | Links | Print Sequence | Item Description | | | | | | | | | | Total Cost |
|--------|---|----------------|---|----------|------------------------|--------------------------|---------------|------|------------|---------------------|----------|------------|------------|
| | | | Receipt Method | Quantity | Minimum Order Quantity | Catalog Price/ Unit Cost | Net Unit Cost | UDM | Discount % | Total Discount Amt. | Tax Rate | Tax Amount | |
| 1 | Master Blanket # / Line #: ADSP014-060194 / 1
Pcard Enabled
Req # / Item #: INDCOM16-00299385 / 1 | 1.0 | (645 - 33) Staples Copy Paper, LETTER-Size, 92/104 US/Euro Brightness, 20 lb., 8 1/2" x 11", Case, 5,000 sheets | | | | | | | | | | \$1153.28 |
| | Quantity | | 1.0 | 0.0 | \$1,060.00 | \$1,060.00 | PF - Pallet | 0.00 | \$0.00 | 8.800% | \$93.28 | | |
| Total | | | | | | | | | | | | \$1153.28 | |

- Notice the description of the UOM is missing

[illegible]

- Notice the description of the UOM is blank

Item #	Links	Print Sequence	Item										Total Cost
			Receipt Method	Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	
1	Master Blanket # / Line #: ADSP014-060194 / 1 Pcard Enabled Req # / Item #: INDCOM16-00299385 / 1	1.0	(645 - 33) Staples Copy Paper, LETTER-Size, 92/104 US/Euro Brightness, 20 lb., 8 1/2" x 11", Case, 5,000 sheets										\$1153.28
			Quantity	1.0	0.0	\$1,060.00	\$1,060.00		0.00	\$0.00	8.800%	\$93.28	
			Total										

4. Specification Field Error


Exception occurred trying to send the PO. Cause: ; The document could not be submitted due to errors.; No values may be entered on any Specifications fields when the Line Type is Service (A1904); No values may be entered on any Specifications fields when the Line Type is Service (A1904); The document could not be submitted due to errors.; Draft; Rejected; ; ; ; ...

Header Information

Purchase Order Number: ADSP013-034209 Release Number: 51 Short Description: OPEN/Sprint

5. Service Line Item with Information in Specification Fields

- All the Specification fields **SHOULD BE BLANK** for service line items
- Service line items have NIGP codes in the 900 series

Item #:	1	Print Sequence:	1.0	Item Type:	Normal
Item Status:	3PS - Sent	Minimum Order Quantity:	0.0	Stock Item Number:	
Description: CELLULAR SERVICE 25% off of public pricing. Activation fee waived. Cancellation fee waived					

Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
Quantity	0.0	\$0.00	\$0.00	EA - Each	0.0%	\$0.00	\$0.00

915 - COMMUNICATIONS AND MEDIA RELATED SERVICES		Tax Rate:	
75 - Telephone Services, Cellular		Tax Amount:	\$0.00
Commodity Code:		Extended Amount:	\$0.00

Manufacturer:	All	Brand:	Model:
Make:	All	Packaging:	

Screenshots Continued