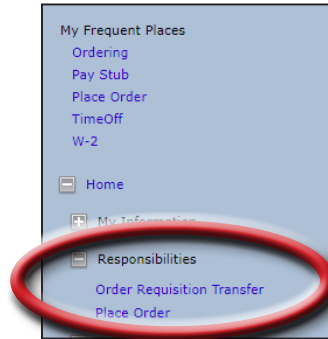


# SMART Systems &

## Transferring Web Orders to SMART Finance (SF) for the Business Office

This procedure will transfer the Express online marketplace order from SMART eR to SF as a requisition or purchase order. It is expected that this step will be completed by a SMART Finance user with PO Admin rights.

1. Log in to SMART eR and click on **Responsibilities > Order Requisition Transfer**.



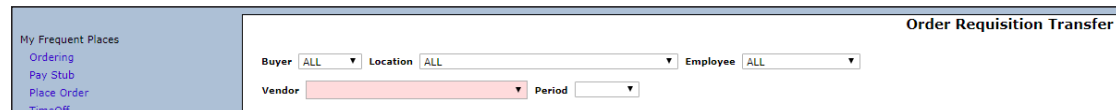
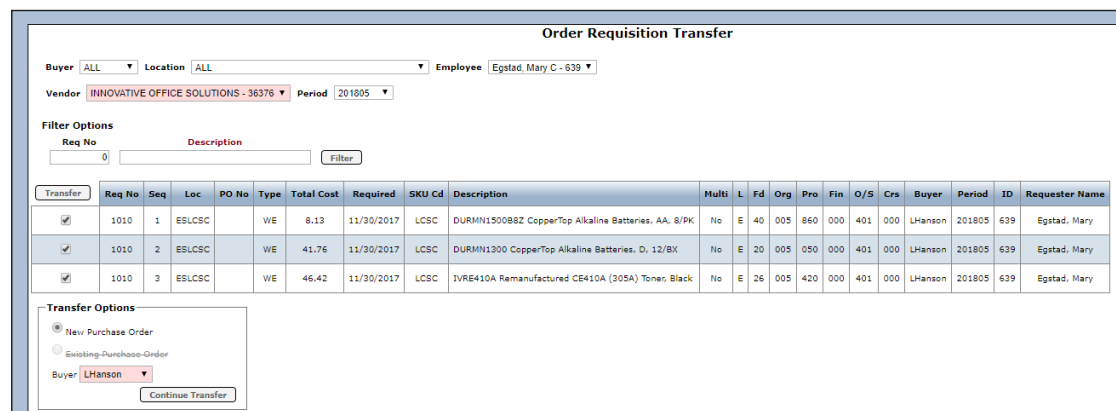
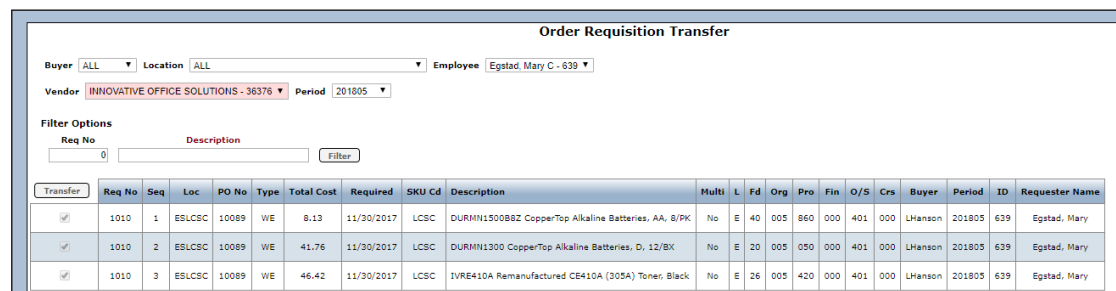
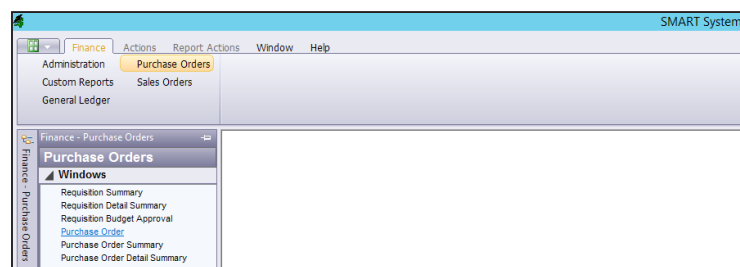
2. Use the drop-down menus to find the items you wish to transfer. SMART allows you to select items by vendor and create separate POs for each vendor to simplify the vouchering process.

Select the items using the check boxes to the left of each item and then click **Transfer**.

In the Transfer Options box underneath the order, check **New Purchase Order**, select the buyer, and then click **Continue Transfer**.

Once you click Transfer the items gray out and you won't be able to select them anymore.

3. Open SMART Finance and log in. Click on **Purchase Orders** at the top and then **Purchase Order** on the left-hand side.

A screenshot of the SMART eR 'Order Requisition Transfer' form. It features a sidebar on the left with navigation links. The main area contains several dropdown menus: 'Buyer' (set to ALL), 'Location' (set to ALL), 'Employee' (set to ALL), 'Vendor' (set to INNOVATIVE OFFICE SOLUTIONS - 36376), and 'Period' (set to 201805).A screenshot of the SMART eR 'Order Requisition Transfer' form showing a table of items. The table has columns for 'Req No', 'Seq', 'Loc', 'PO No', 'Type', 'Total Cost', 'Required', 'SKU Cd', 'Description', 'Multi', 'L', 'Fd', 'Org', 'Pro', 'Fin', 'O/S', 'Cr', 'Buyer', 'Period', 'ID', and 'Requester Name'. Three items are listed, each with a checked checkbox in the 'Transfer' column. Below the table is a 'Transfer Options' box with radio buttons for 'New Purchase Order' (selected) and 'Existing Purchase Order', and a 'Buyer' dropdown set to 'LHanson'.A screenshot of the SMART eR 'Order Requisition Transfer' form showing a table of items. The table has columns for 'Req No', 'Seq', 'Loc', 'PO No', 'Type', 'Total Cost', 'Required', 'SKU Cd', 'Description', 'Multi', 'L', 'Fd', 'Org', 'Pro', 'Fin', 'O/S', 'Cr', 'Buyer', 'Period', 'ID', and 'Requester Name'. Three items are listed, each with a checked checkbox in the 'Transfer' column. Below the table is a 'Transfer Options' box with radio buttons for 'New Purchase Order' (selected) and 'Existing Purchase Order', and a 'Buyer' dropdown set to 'LHanson'.

Continued on reverse

4. Search for the PO by buyer, using your credentials. Then click **Find/Retrieve**. Scroll through the purchase orders until you find your current order, which has a PO number assigned to it.

**Purchase Order - Edit Mode**

Batch No. [ ] Company 0926 PO No. 10089 No Route **AS** Notes

Status Open Buyer LHansc PO Date 11/30/2017 INNOVATIVE OFFICE SOLUTIONS

Vendor Group 1 Vendor Code 36376 Currency USD AB#1004

Date Promised 11/30/2017 Date Required 11/30/2017 Mail To APPLE VALLEY MN 55124-9017

Date Closed 00/00/0000 Terms RECEIPT Confirm? Hold? ☐

Ship Via [ ] Category [ ] Printed? ☐ Emailed? ☐

Comment ATTN: Linette

Ven Comment [ ] Type Web Express W-9 date: 00/00/0000

Seq	Prt Seq	Multi	Bdct	Covr	Status	SKU	Description	Units	U.Type	Rate	Discount %	Total Cost	Loc	Co	L	Fd	Ord	Pro	Fin	O/S	Crs	Type	Peri
1	1				Open	LCSC	DURMN1500B8Z CopperTo	1.00	PK	8.13	0.000%	8.13	ESLC:0926	E	40	005	860	000	401	000	F	2016	
2	2				Open	LCSC	DURMN1300 CopperTop Al	2.00	BX	20.88	0.000%	41.76	ESLC:0926	E	20	005	050	000	401	000	F	2016	
3	3				Open	LCSC	IVRE410A Remanufacturec	1.00	EA	46.42	0.000%	46.42	ESLC:0926	E	26	005	420	000	401	000	F	2016	

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Print Email Det Comment Distribution Acct Analysis SKU Analysis Xfr History Rec'd History Copy PO

5. Click on **Route** and the Route Slip - New Mode window will appear. Use the **Assign To** drop down to choose the approver and under **Action**, select **Approve**. Click **Save** and then click **Send**.

**Route Slip - New Mode**

Route Item Purchase Order Item Company 0926

Item Number 10089

Notify On Completion ☐ Sent Date 00/00/0000

Notify On Rejection ☐ Notify Person 313

Level	Assign To	Action	Status	Initiator	Performed By
1	Melissa Mattson	APPRV	Waiting	313	

Reroute Send Comments

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6. Once the order is approved, open up the PO. NOTE: For the next step, the PO cannot have the box next to "Printed?" checked. Please uncheck the box before proceeding.

**Purchase Order - Edit Mode**

Batch No. [ ] Company 0926 PO No. 10089 Routed **AS** Notes

Status Open Buyer LHansc PO Date 11/30/2017 INNOVATIVE OFFICE SOLUTIONS

Vendor Group 1 Vendor Code 36376 Currency USD AB#1004

Date Promised 11/30/2017 Date Required 11/30/2017 Mail To APPLE VALLEY MN 55124-9017

Date Closed 00/00/0000 Terms RECEIPT Confirm? Hold? ☐

Ship Via [ ] Category [ ] Printed? ☐ Emailed? ☐

Comment ATTN: Linette

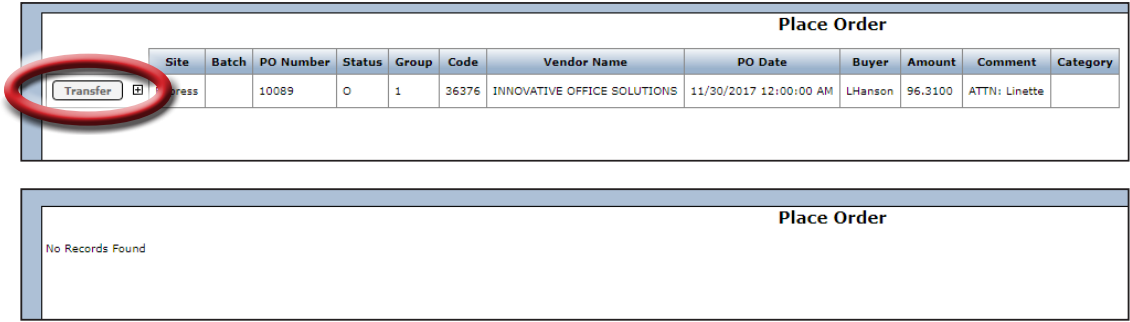
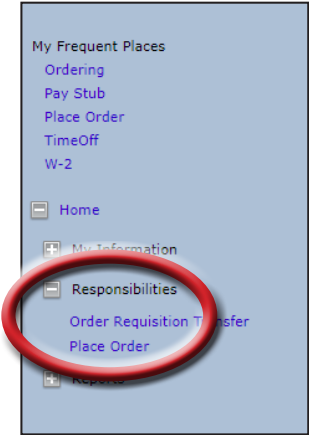
Ven Comment [ ] Type Web Express W-9 date: 00/00/0000

Seq	Prt Seq	Multi	Bdct	Covr	Status	SKU	Description	Units	U.Type	Rate	Discount %	Total Cost	Loc	Co	L	Fd	Ord	Pro	Fin	O/S	Crs	Type	Peri
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96.31

Print Email Det Comment Distribution Acct Analysis SKU Analysis Xfr History Rec'd History Copy PO

7. Log into SMART eR and go to **Responsibilities** > **Place Order** and click **Transfer** next to the PO.  
After you click **Transfer**, the screen will say “No Records Found.”



This confirms you have successfully sent the order back to Express and on to the supplier(s).