

Looking Up and Changing the Ship To and Location in a Requisition



This job aid describes how to look up and change the following two fields on a requisition:

- ◆ Ship To
- ◆ Location

There are two ways to change the Ship To and Location. You can change the Ship To and Location when creating a requisition; these fields will often default in and you may need to change one or both fields. If you have already added line items to a requisition or are editing an existing requisition, you must use the second method, which is changing the Ship To and Location from the Review and Submit page.

Please remember that these Ship To and Location fields will appear on the printed Purchase Order and determine where the requested items will be shipped.

Step 1. Log into the e*mpac Application with your Username and Password.

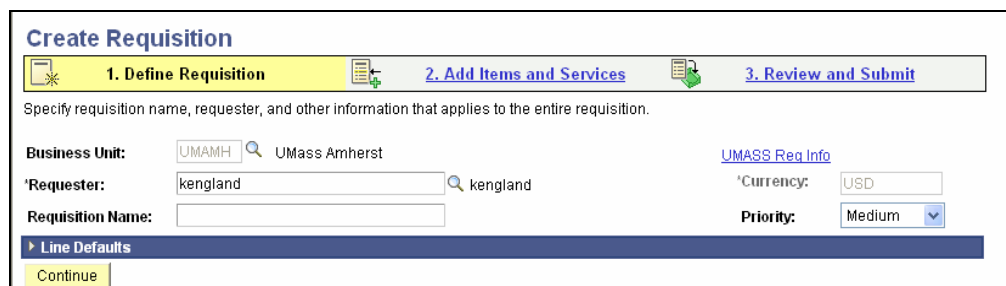
Modifying the Ship To and Location fields when Creating a Requisition




Navigate to the following path:

eProcurement → Create Requisition

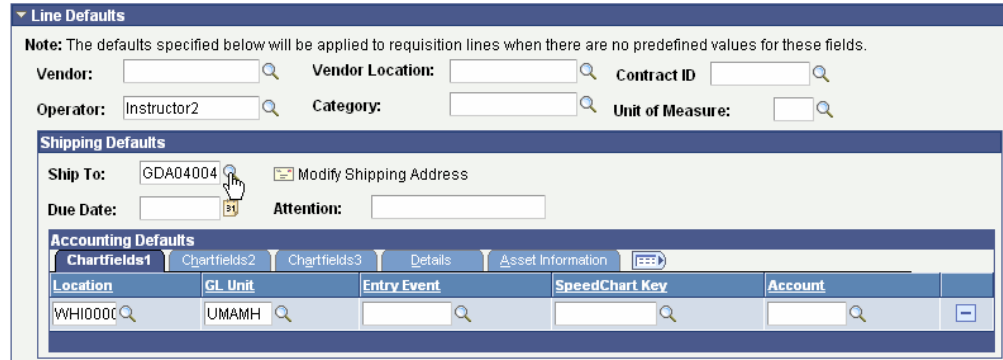
The ***Create Requisition (Define Requisition)*** page opens.



The screenshot shows the 'Create Requisition' page with three tabs: '1. Define Requisition' (active), '2. Add Items and Services', and '3. Review and Submit'. Below the tabs, there is a text prompt: 'Specify requisition name, requester, and other information that applies to the entire requisition.' The form includes fields for 'Business Unit' (UMAMH), 'Requester' (kengland), 'Requisition Name', 'Currency' (USD), and 'Priority' (Medium). A 'Line Defaults' section is expanded, showing a 'Continue' button.

Step 2. Click the  button next to the ***Line Defaults*** section.

The **Line Defaults** section expands.




Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: Vendor Location: Contract ID:



Operator: Category: Unit of Measure:

Shipping Defaults

Ship To:  [Modify Shipping Address](#)

Due Date: Attention:

Accounting Defaults

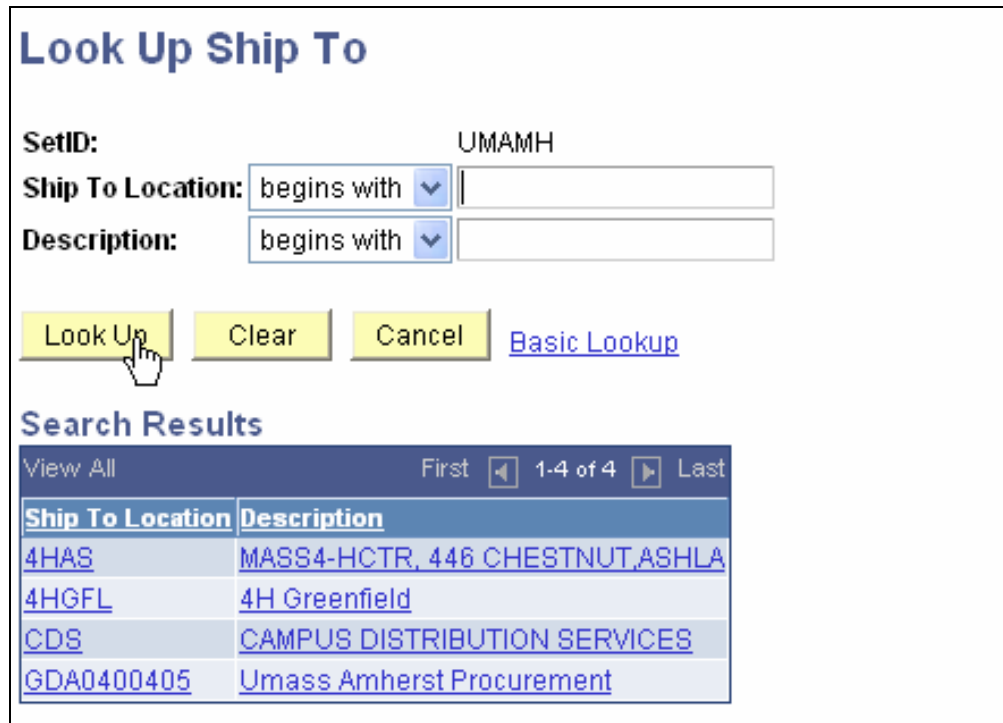
Location	GL Unit	Entry Event	SpeedChart Key	Account
<input type="text" value="WH1000"/> 	<input type="text" value="UMAMH"/> 	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Continue](#)

Step 3. Change the **Ship To** field.

To look up a new Ship To, click the  button to the right of the field.

The **Look Up Ship To** page opens.



Look Up Ship To



SetID:

Ship To Location:

Description:

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results

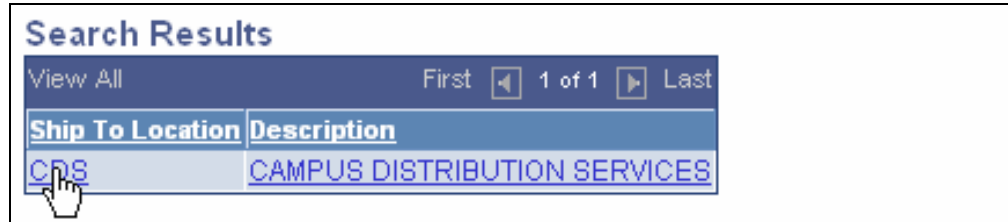
View All First  1-4 of 4  Last

Ship To Location	Description
4HAS	MASS4-HCTR, 446 CHESTNUT,ASHLA
4HGFL	4H Greenfield
CDS	CAMPUS DISTRIBUTION SERVICES
GDA0400405	Umass Amherst Procurement

Step 4. Enter the appropriate search criteria.

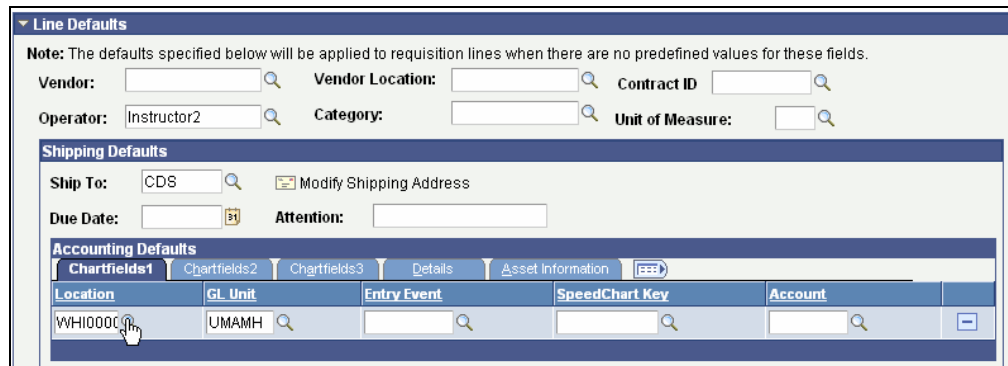
Step 5. Click [Look Up](#).

The Search Results appear.




Step 6. Click the **Ship To Location** link.

The new **Ship To Location** appears in the **Ship To** field.



Step 7. Change the **Location** field.

To look up a new Location, click the  button to the right of the field.

The **Look Up Location** page opens.

Look Up Location Code

SetID:

Location Code: begins with

Description: begins with

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All First 1-100 of 300 Last

Location Code	Description
4HAS	MASS4-HCTR, 446 CHESTNUT,ASHLA
4HDIG	4H Dighton
4HGFL	4H Greenfield
4HHAT	4H Hathorne
4HSHAD	4H South Hadley
4HWAL	4H Walpole
ABS0000000	ABATTOIR SLAUGHTER H
ABS0100001	ABATTOIR SLAUGHTER H
ABS0100002	ABATTOIR SLAUGHTER H
ABS0100003	ABATTOIR SLAUGHTER H
ABS0100004	ABATTOIR SLAUGHTER H

Step 8. Enter the appropriate search criteria.

Step 9. Click .

The Search Results appear.

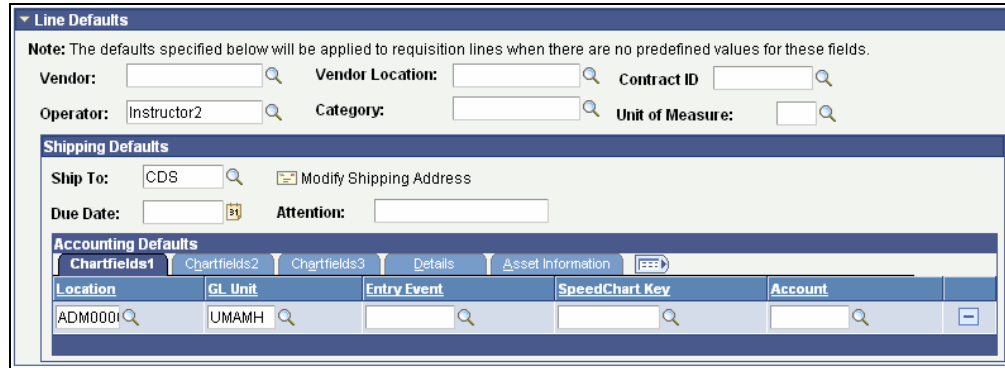
Search Results

View All First 1-69 of 69 Last

Location Code	Description
ADM0000000	WA-ADMINISTRATION BL
ADM0000001	WA-ADMINISTRATION BL
ADM0000002	WA-ADMINISTRATION BL
ADM0000003	WA-ADMINISTRATION BL
ADM0000004	WA-ADMINISTRATION BL
ADM0000005	WA-ADMINISTRATION BL
ADM0000006	WA-ADMINISTRATION BL
ADM0000007	WA-ADMINISTRATION BL
ADM0000008	WA-ADMINISTRATION BL
ADM0000009	WA-ADMINISTRATION BL
ADM0000010	WA-ADMINISTRATION BL

Step 10. Click the **Location Code** link.

The new **Location Code** appears in the **Location** field.



Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Vendor: Vendor Location: Contract ID:
 Operator: Category: Unit of Measure:

Shipping Defaults

Ship To:
 Due Date: Attention:

Accounting Defaults

Location	GL Unit	Entry Event	SpeedChart Key	Account
<input type="text" value="ADM0001"/>	<input type="text" value="UMAMH"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



Remember that changing the **Ship To** and **Location** field in the Requisition will determine where the PO items are eventually shipped.

Changing the Ship To and Location fields from the Review and Submit page



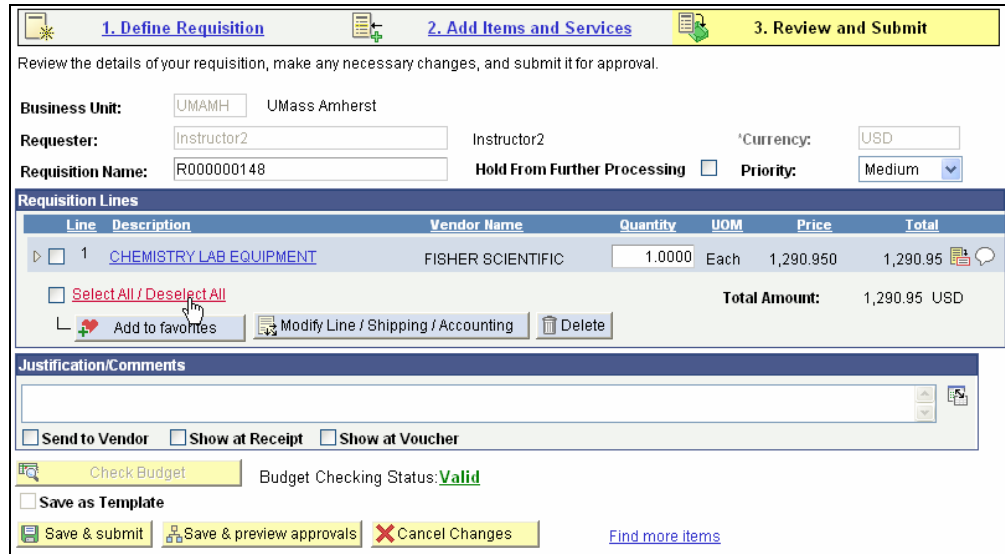
If you have added line items to a new requisition or are editing a previously saved requisition, you must edit the **Accounting Defaults** fields from the **Review and Submit** page.



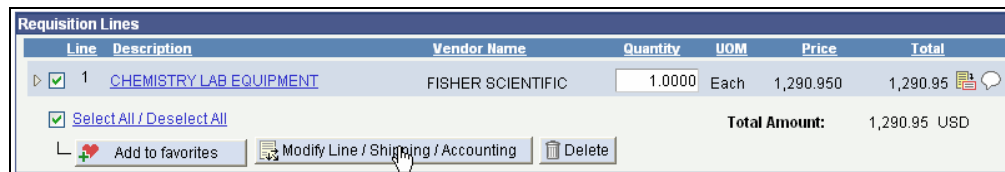
If you are in the requisition **Approval** page, you would access the requisition by clicking on the **Edit Requisition** button. You should be on the **Review and Submit** tab.

If you are in the **Manage Requisitions** page, you would locate the requisition and access it by selecting the **Edit Requisition** option. Then, make sure you are on the **Review and Submit** tab.

The **Review and Submit** page opens.

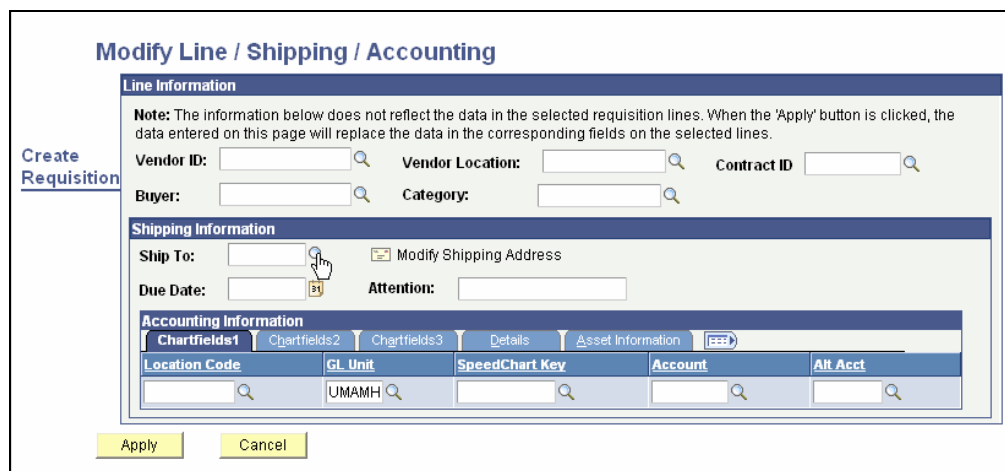


Step 11. Click the [Select All / Deselect All](#) link in the Requisition Lines section.



Step 12. Click the [Modify Line / Shipping / Accounting](#) button.

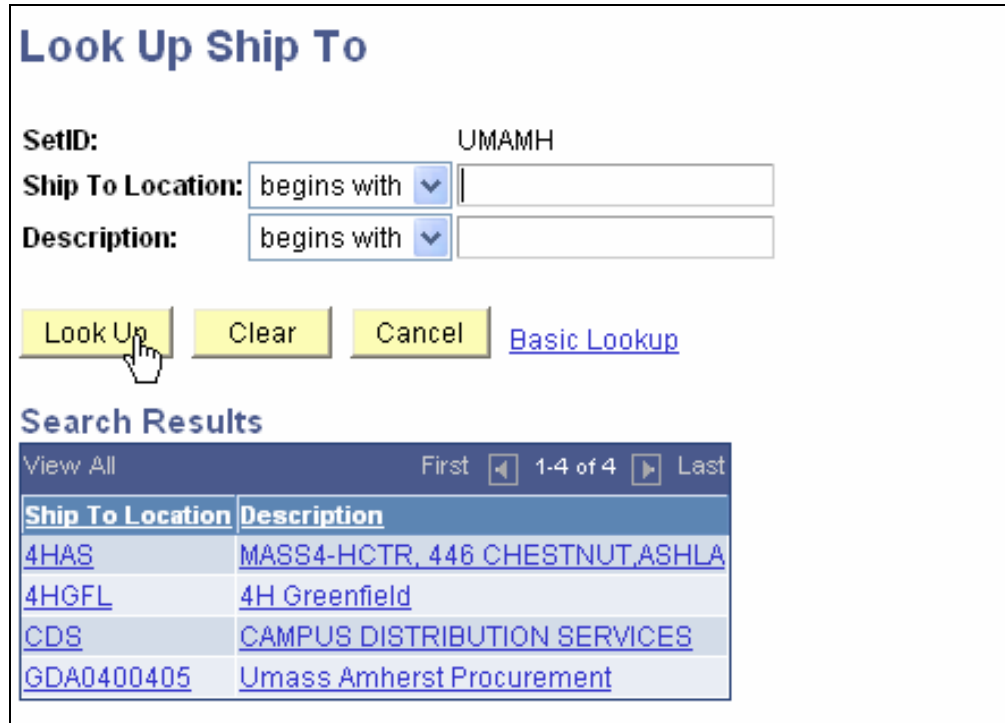
The **Modify Line / Shipping / Accounting** page opens.



Step 13. Change the **Ship To** field.

To look up a new Ship To, click the  button to the right of the field.

The **Look Up Ship To** page opens.



Look Up Ship To

SetID: UMAMH

Ship To Location: begins with |

Description: begins with |

Look Up Clear Cancel [Basic Lookup](#)

Search Results

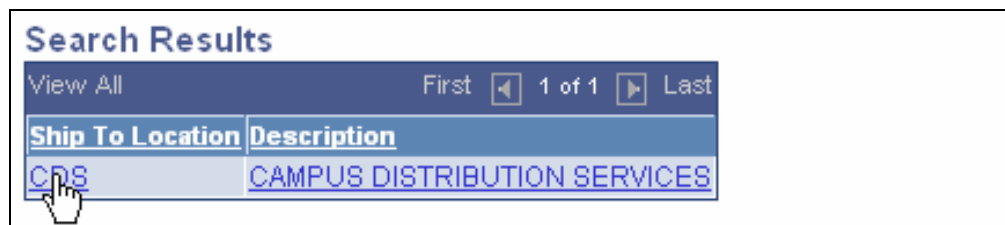
View All First 1-4 of 4 Last

Ship To Location	Description
4HAS	MASS4-HCTR, 446 CHESTNUT,ASHLA
4HGFL	4H Greenfield
CDS	CAMPUS DISTRIBUTION SERVICES
GDA0400405	Umass Amherst Procurement

Step 14. Enter the appropriate search criteria.

Step 15. Click **Look Up**.

The Search Results appear.



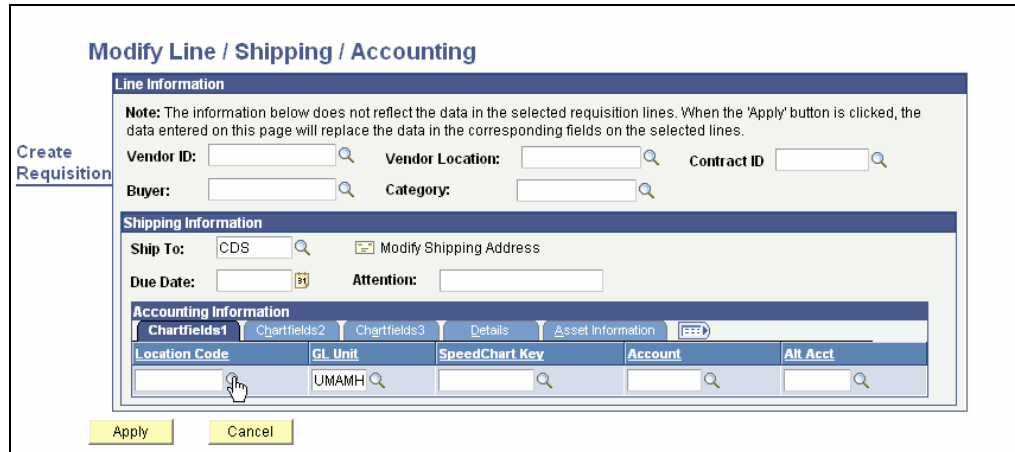
Search Results

View All First 1 of 1 Last

Ship To Location	Description
CDS	CAMPUS DISTRIBUTION SERVICES

Step 16. Click the **Ship To Location** link.

The new **Ship To Location** appears in the **Ship To** field.



Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location: Contract ID:

Buyer: Category:

Shipping Information

Ship To:


Due Date: Attention:

Accounting Information

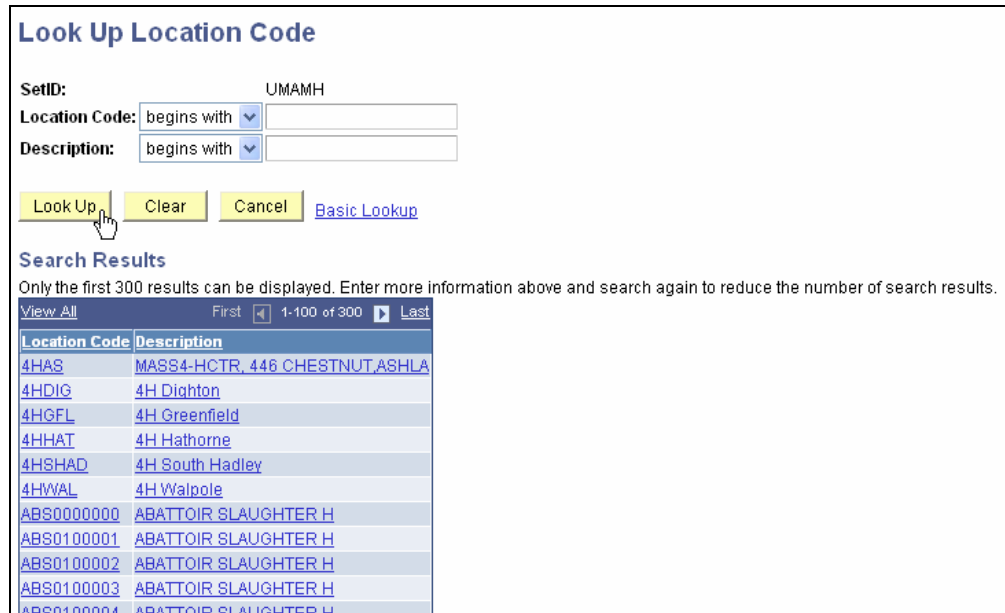
Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Location Code	GL Unit	SpeedChart Key	Account	Alt Acct
<input type="text"/>	UMAMH <input type="button" value=""/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 17. Change the **Location** field.

To look up a new Location, click the  button to the right of the field.

The **Look Up Location** page opens.



Look Up Location Code

SetID:

Location Code: begins with

Description: begins with

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All First 1-100 of 300 Last

Location Code	Description
4HAS	MASS4-HCTR, 446 CHESTNUT,ASHLA
4HDIG	4H Dighton
4HGFL	4H Greenfield
4HHAT	4H Hathorne
4HSHAD	4H South Hadley
4HWAL	4H Walpole
ABS000000	ABATTOIR SLAUGHTER H
ABS0100001	ABATTOIR SLAUGHTER H
ABS0100002	ABATTOIR SLAUGHTER H
ABS0100003	ABATTOIR SLAUGHTER H
ABS0100004	ABATTOIR SLAUGHTER H

Step 18. Enter the appropriate search criteria.

Step 19. Click .

The Search Results appear.

Search Results

View All First 1-69 of 69 Last

Location Code	Description
ADM0000000	WA-ADMINISTRATION BL
ADM0000001	WA-ADMINISTRATION BL
ADM0000002	WA-ADMINISTRATION BL
ADM0000003	WA-ADMINISTRATION BL
ADM0000004	WA-ADMINISTRATION BL
ADM0000005	WA-ADMINISTRATION BL
ADM0000006	WA-ADMINISTRATION BL
ADM0000007	WA-ADMINISTRATION BL
ADM0000008	WA-ADMINISTRATION BL
ADM0000009	WA-ADMINISTRATION BL
ADM0000010	WA-ADMINISTRATION BL

Step 20. Click the **Location Code** link.

The new **Location Code** appears in the **Location** field.

Modify Line / Shipping / Accounting

Create Requisition

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location: Contract ID:

Buyer: Category:

Shipping Information

Ship To: CDS Modify Shipping Address

Due Date: Attention:

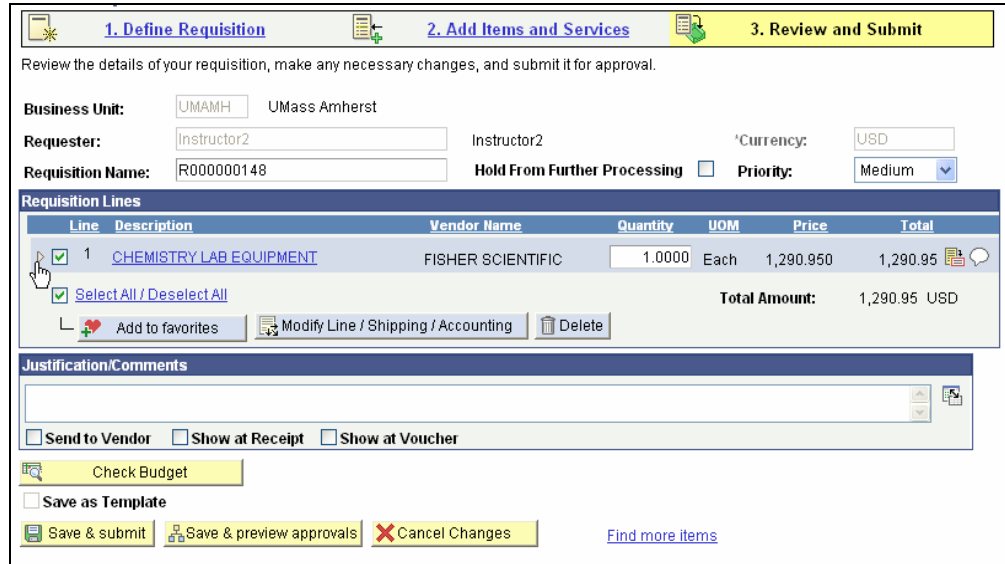
Accounting Information

Location Code	GL Unit	SpeedChart Key	Account	Alt Acct
<input type="text"/> ADM0000009	<input type="text"/> UMAMH	<input type="text"/>	<input type="text"/>	<input type="text"/>


Apply Cancel

Step 21. Click the **Apply** button.

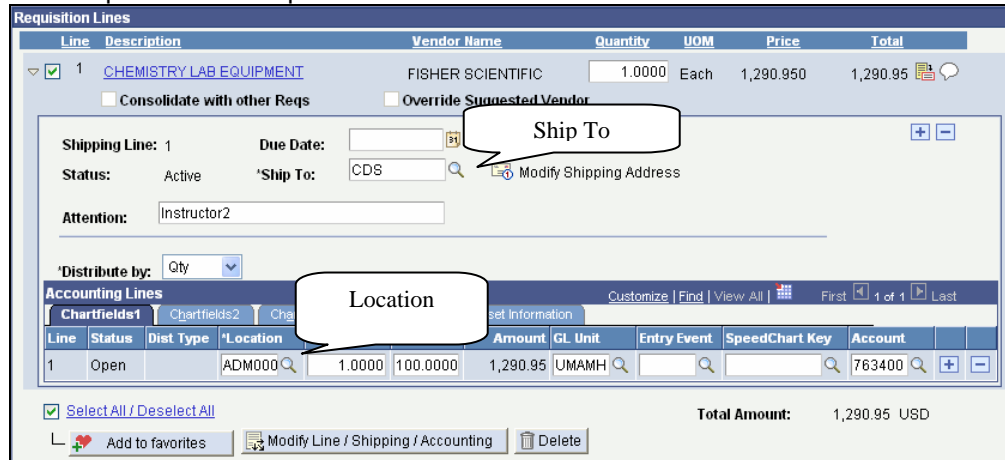
The **Review and Submit** page reopens.




The chartfields have been updated at the Requisition Lines level. To verify the change, please see the next few steps.

Step 22. Click the expansion icon  next to the line.

The Requisition Line expands.




The Ship To and the Location field are displayed. Both fields should reflect the changes you made at the **Modify Line / Shipping / Accounting** level.

END OF JOB AID



Last Edited Date	3/14/2007
Last Edited By	Kristina England