

PO.020.800 – Adding and Maintaining Ship To Locations

Purpose	To add and maintain Ship To Locations used when creating Requisitions and Purchase Orders.
Description	The Ship To Location refers to where goods will be shipped, as well as includes delivery instructions.
Security Role	BOR_PO_SETUP_CONFIG
Dependencies/ Constraints	Location must exist in PeopleSoft before a Ship To Location can be created.
Additional Information	<p>Locations refer to a physical address associated with the supplier and are identified by a Location Code and SetID, while the Ship To Code is used on transactions to identify where goods will be shipped.</p> <p>The address and phone information that a Ship To Location references is defined on the Location.</p>

Procedure

Below are step by step instructions on how to add a new Ship To Location.

Step	Action
1.	Click NavBar icon.
2.	Click the Menu icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Click the Product Related link.
5.	Click the Procurement Options link.
6.	Click the Purchasing link.
7.	Click the Ship To Locations link.
8.	Click the Add a New Value tab.
9.	Search for a Location in the Ship To Location field.
10.	Click the Add button.
11.	Click the plus (+) button to add an new effective dated row.
12.	Verify the Effective Date is correct.
13.	Verify the Status is set to Active.
14.	Verify the Description and Short Description default from the Location. <i>Note: These fields can be changed if needed.</i>
15.	Verify the Inventory Unit is blank.
16.	Verify the Receiving Business Unit defaults with the business unit number.
17.	Verify the Region SetID defaults to SHARE. If not, set the Region SetID to SHARE.
18.	Verify the Region Code is blank.
19.	Verify the Send Expected Receipt checkbox is unchecked.
20.	If needed, enter Delivery instructions (aka Ship To Comments). Once Delivery Instructions are entered and saved, the Copy to Transactions checkbox becomes available. If this checkbox is selected the comments will appear on the purchase order.
21.	Click the Sales/Use Tax link.
22.	Click the Exception Type dropdown menu.
23.	Select the Exempt/Exonerated option.
24.	Click the Sales/Use Tax Applicability dropdown menu.

Step	Action
25.	Click the Exempt list item.
26.	Click the Return link at the top of the page.
27.	Click the Save button.
28.	The system generates a message that states “Warning – Either the Certificate ID or its ending date are not specified. The Certificate ID and its Expire/End Date are expected when Tax Exempt is chosen. Press Cancel to go back and enter the details or press OK to save as it is.”
29.	Click the OK button.
30.	Click the Save button.

Below are step by step instructions on how to maintain an existing Ship To Location.

Step	Action
1.	Click NavBar icon.
2.	Click the Menu icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Click the Product Related link.
5.	Click the Procurement Options link.
6.	Click the Purchasing link.
7.	Click the Ship To Locations link.
8.	Click the Find an Existing Value tab.
9.	Enter or search for the Ship To Location in the Ship To Location field.
10.	Click the Search button.
11.	Select a Ship To Location to modify.
12.	Add a new effective dated row by clicking the plus (+) button.
13.	Edit the Ship To Location information as needed.
14.	Click the Sales/Use Tax link.
15.	Click the Exception Type dropdown menu.
16.	Select the Exempt/Exonerated option.
17.	Click the Sales/Use Tax Applicability dropdown menu.
18.	Click the Exempt list item.
19.	Click the Return link at the top of the page.
20.	Click the Save button.
21.	The system generates a message that states “Warning – Either the Certificate ID or its ending date are not specified. The Certificate ID and its Expire/End Date are expected when Tax Exempt is chosen. Press Cancel to go bank and enter the details or press OK to save as it is.”
22.	Click the OK button.