

Editing Line Items

This process guide provides instruction on the functional steps to edit line items on an eRequisition. To add additional line item information, such as accounting, users can edit the line item from the Shopping Cart or Checkout page. The same line item information is available to edit in both places. The following example utilizes the Checkout page of the eRequisition.

1.0 Editing a Single Line Item

The screenshot displays the 'Checkout' page of an eRequisition system. At the top, there are tabs for 'Summary' and 'Approval Flow'. Below these is a 'Title' field containing 'Test Requisition'. The main section is titled 'Line Items (2)' and features a table with the following columns: No., Type, Description, Qty, Unit, Price, Tax, Other, and Amount. A single line item is visible, selected with a checkmark in the 'No.' column. The item details include: DBE (Statewide, Recycled, Good, Regular, Contract) Test item 1., Contract ID: 600A, Supplier: AFP INDUSTRIES INC., Location: AFP INDUSTRIES INC., and Commodity Code: 785-55 - Engineering And Te... The table row shows a quantity of 1, unit of 'each', a price of \$10.48USD, a tax of \$0.73USD, and a total amount of \$11.21USD. Below the table, there are buttons for 'Edit', 'Copy', 'Delete', and 'Add items'. The 'Edit' button is circled with a dashed line. In the bottom right corner, a yellow box displays 'Total Cost: \$758.07USD' and an 'Update Total' button. A yellow callout box on the left side of the screenshot points to a small arrow icon in the sidebar, with the text: 'Hide/Show the Shortcut Menu by clicking the arrow.'

1. Place a checkmark beside the line item to edit and click the '**Edit**' button; the Edit Line Item page displays. All details related to this line item are shown on the Edit Line Item page. Users may update the necessary information from this page.

Line Item Details

No.: 1

Description: (Statewide, Recycled, Good, Regular, Contract) Test item 1.

Qty: 1

UOM: each

Commodity Code: 785-55 - Engineering And Te...

Price: \$698.00USD

Tax Rate: 7.0%

Tax Amount: \$48.86USD

Other Costs: \$0.00USD

Supplier: AFP INDUSTRIES INC.

Location: AFP INDUSTRIES INC. **select**

Inventory ID:

Recycled Code:

Item Classification: Good

User Text Field 1:

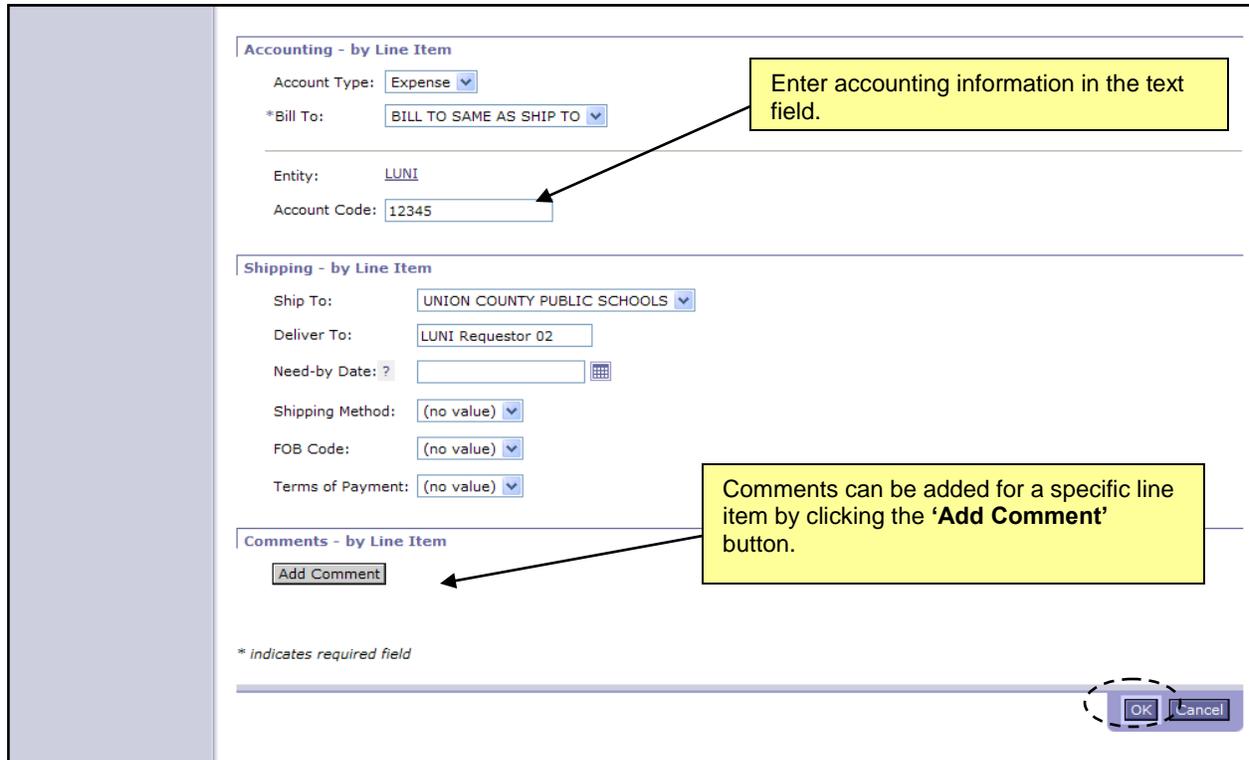
User Text Field 2:

User Text Field 3:

User Text Field 4:

Additional Data:

2. **(For Sunpac Users Only) Inventory ID** – The inventory ID will be passed to Sunpac and validated according to options set within Sunpac.
3. **(For Sunpac Users Only) Recycled Code** – The recycled code will be passed to Sunpac and validated according to options set within Sunpac.
4. **(For Sunpac Users Only) User Text Fields 1-4** – The information entered into these fields will be passed to Sunpac and be viewable using F10. There are currently three possible cross references set up for users to map these fields in Sunpac, but users can use the fields for other information also. The three cross references currently set up for users are:
 - Reference Code
 - MBE Code
 - Department Number
5. **Additional Data** – When an eRequisition line item is a bForm the additional information for that line item (e.g., color, size) will display in the **'Additional Data'** field.



Accounting - by Line Item

Account Type: Expense

*Bill To: BILL TO SAME AS SHIP TO

Entity: LUNI

Account Code: 12345

Shipping - by Line Item

Ship To: UNION COUNTY PUBLIC SCHOOLS

Deliver To: LUNI Requestor 02

Need-by Date: ?

Shipping Method: (no value)

FOB Code: (no value)

Terms of Payment: (no value)

Comments - by Line Item

Add Comment

* indicates required field

OK Cancel

6. **Account Type** – Defaults to '**Expense**' and should not be modified.
7. **Bill To** – Defaults from the user's profile but can be modified using the dropdown box. The Bill to code selected will determine the Bill To address that is printed on the purchase order. The invoice will be delivered to the specified address.
8. **Account Code** – The appropriate account code should be entered in the text field.

Note: E-Procurement does not validate the account number entered or encumber the purchase amount from the designated account code. All financial functions are still completed in the entity financial system.

9. Click the '**OK**' button to complete all edits on the line item.

2.0 Mass Edit Function

When creating an eRequisition with multiple line items, users can mass edit eRequisition line items to set the same values for multiple lines. Not all fields are available for mass editing. Users will find this feature helpful when setting account codes. Commodity codes can also be changed using the mass edit function as long as the items being edited are non-catalog items.

The screenshot shows the 'Checkout' step of an eRequisition process. The page title is 'PRTEST1000133: Test Requisition' with 'Items: 2' and 'Total: \$758.07USD'. The 'Checkout' step is highlighted in the left sidebar. The main content area shows a 'Summary' tab with the title 'Test Requisition'. Below this is a table of 'Line Items (2)'. The table has columns for 'No.', 'Type', 'Description', 'Qty', 'Unit', 'Price', 'Tax', 'Other', and 'Amount'. Two line items are listed, both with a checked checkbox in the 'No.' column. The 'Edit' button for the first line item is circled in red. A yellow warning banner below the table states 'The line item contains one or more invalid fields'. At the bottom right, the 'Total Cost: \$758.07USD' is displayed with an 'Update Total' button.

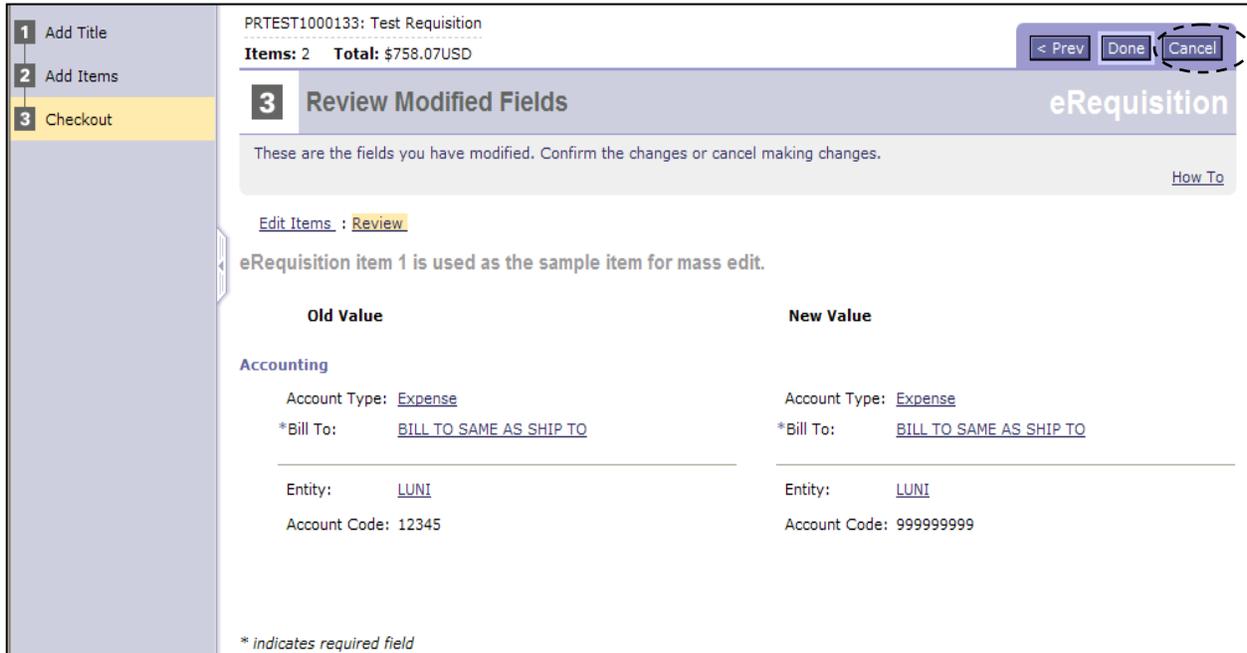
No.	Type	Description	Qty	Unit	Price	Tax	Other	Amount
<input checked="" type="checkbox"/>	1	(Statewide, Recycled, Good, Regular, Contract...	1	each	\$698.00USD	\$48.86USD	\$0.00USD	\$746.86USD
<input checked="" type="checkbox"/>	2	(IT Convenience, non-Recycled, Service...	1	each	\$10.48USD	\$0.73USD	\$0.00USD	\$11.21USD

1. Place a check in the checkbox beside each line item to edit and click the 'Edit' button. This begins the mass edit function.

2. Edit the necessary fields and click the **'Next'** button to continue.

Note: The mass edit function uses line item 1 as a sample item for the mass edit. Users edit the necessary fields on the sample line item. When done editing, the changes made against the sample line item will be applied to all selected line items.

Note: If the mass edit function includes a combination of catalog, non-catalog, punchout, and eQuote line items, users will only be able to mass edit fields that are editable for a catalog line item.



1 Add Title
 2 Add Items
 3 Checkout

PRTEST1000133: Test Requisition
 Items: 2 Total: \$758.07USD

< Prev Done **Cancel**

3 Review Modified Fields eRequisition

These are the fields you have modified. Confirm the changes or cancel making changes. [How To](#)

[Edit Items](#) : [Review](#)

eRequisition item 1 is used as the sample item for mass edit.

Old Value	New Value
Accounting	
Account Type: Expense	Account Type: Expense
*Bill To: BILL TO SAME AS SHIP TO	*Bill To: BILL TO SAME AS SHIP TO
Entity: LUNI	Entity: LUNI
Account Code: 12345	Account Code: 999999999

* indicates required field

3. Review the modified fields and click **'Done'** to complete the mass edit.