

Commodity Code Functionality

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Introduction

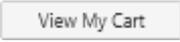
In this segment of our purchasing training we cover “Commodity Code Functionality in SDezBuy”. The South Dakota Board of Regents has invested in a tool to make it easier for users to determine the commodity code selection on hosted and punchout catalog orders. When using one of the SDezBuy punchout or hosted catalogs, commodity codes will auto-populate each line in the cart for all those commodity codes that have currently been mapped. In addition, this tool allows the user to assign the same commodity code to all lines at one time.

It is important to note that **not all** commodity codes have been mapped for all items. The Purchasing Office will continue to make updates to the functionality so that the commodity code will auto-populate more and more items. There may also be a “miss-mapped” code from time to time. Users will be able to manually update a code for one or many in their shopping cart or on the requisition summary screen.

The approval routing process has not changed. Since the requisition routes to the appropriate approvers, one of which is the buyer, based on the commodity code used, it is important that users continue the process of changing all lines on the entire order to a single commodity code. In our demonstration, you will see how this can be done easily with this functionality.

One other thing that has changed due to our auto-populating of the commodity code is that there is no longer a commodity code value populated from the user’s profile. That has been turned off to make this possible.

Here are the steps for this functionality to work:

1. **Shop** for the items using one of the catalogs in SDezBuy. A list of items will display.
2. Select the item by entering a quantity and clicking on the **Add to Cart** button. Submit the contents back to our SDezBuy application.
3. Click on the **cart summary**  **408.64 USD** and  in the banner at the top-right of the page, if not already viewing the cart.
4. The commodity code for each item will display, if the item has been mapped. If an item has not been mapped, it will still show as a required field. 

This is a screenshot of a shopping cart from the Fastenal punchout catalog. You will notice that there is one commodity code that has not auto-populated. After proceeding to check-out, you will be able to change this with one step. Notice also that the commodity codes are product-specific and so may have several different commodity codes in a single cart especially from suppliers such as Fastenal or Grainger as they have a broad range of products.

The screenshot shows a shopping cart from the Fastenal punchout catalog. The cart contains four items, each with a commodity code field. The first item, '12oz Can Touch N' Seal', has a yellow 'Required field' error message next to its empty commodity code field. The other three items have their commodity codes populated.

Product Description	Unit Price	Quantity	Total
12oz Can Touch N' Seal[REGI] All Direction Dispensing Foam Part Number: 63800 Manufacturer Info: 4004521212 - (CONVENIENCE PRODUCTS) Commodity Code: [Required field]	4,3547 USD EA	12	52.26 USD
10.1oz Cartridge Clear Latex Liquid Nails[REGI] Window/Door Caulk Sealant Part Number: 63909 Manufacturer Info: 407634 - (Liquid Nails) Commodity Code: 52100 Maintenance, Repairs, Operating Supplies	3,435 USD EA	12	41.22 USD
6ft Green Snap Hook Tie Back 310lb WLL Shock Absorbing Lanyard Part Number: 1007376 Manufacturer Info: 9138/6FTGN - (Honeywell Safety Products) Commodity Code: 71750 Safety & Security Supplies	146,3775 USD EA	4	585.51 USD
AAA Cell Size Duracell[REGI] Procell[REGI] Alkaline Battery Part Number: 0215010 Manufacturer Info: 0004133353648 - (DURACELL) Commodity Code: 58500 Office Supplies	0,2329 USD EA	288	67.08 USD

5. Click on the **Proceed to Checkout** button.

The screenshot shows the checkout page of the shopping cart. The 'Proceed to Checkout' button is highlighted with a red box. The page displays the cart total of 746.07 USD and a 'Proceed to Checkout' button.

6. Click on the **Requisition Summary** tab or click on the Final Review button in the Progress Bar. The screen will then show the line item details. Scroll down to the line item details.

The screenshot shows the 'Requisition Summary' page. The 'Final Review' button in the progress bar is highlighted with a red box. The 'Requisition Summary' tab is also highlighted with a red box. The page displays a warning message: 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' and a 'Required field: Requested Delivery Date' error. Below the warning, the 'Shipping' section is visible, showing the shipping address and phone number.

The goal is to make sure that all lines of the requisition are using the same commodity code. This will then route the purchase requisition (PR) to the correct approvers before the purchase order can be distributed to the supplier.

- Review the requisition lines for either the item that is the highest dollar amount. For this particular requisition, line item number 3 is the highest. The commodity code for line 3 shows as 71750. All lines of the requisition need to have the 71750 commodity code in the commodity code fields.

It is also appropriate to look for a **majority**. If the majority of the lines are of same/similar category, then choose the commodity code for that category and select it for all lines.

- Click in the **checkbox** next to Ext. Price in the header line of the line item details. This will select all lines. Note, if there is only one or a couple that need to be changed, you can click in the checkbox at the right of each line to select just those lines that need to be changed.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>
1 12oz Can Touch N' Seal[REG] All Direction Dispensing Foam more info...	63800	EA	4.3547	12 EA	52.26 USD	<input checked="" type="checkbox"/>
Manufacturer Name: CONVENIENCE PRODUCTS Manufacturer Part Number: 4004521212 Supplier Part Auxiliary ID: 4004521212 more info...	Commodity Code Required field	Internal note Internal Attachments Note for supplier Attachments for supplier				

- Scroll up, if you need to, to reveal the **For selected line items** drop-down list.

- Click on the drop-down arrow and select **Change Commodity Code**.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>
1 12oz Can Touch N' Seal[REG] All Direction Dispensing Foam more info...	63800	EA	4.3547	12 EA	52.26 USD	<input checked="" type="checkbox"/>
Manufacturer Name: CONVENIENCE PRODUCTS Manufacturer Part Number: 4004521212 Supplier Part Auxiliary ID: 4004521212 more info...	Commodity Code Required field	Internal note Internal Attachments Note for supplier Attachments for supplier				
2 10.1oz Cartridge Clear Latex Liquid Nails[REG] Window/Door Caulk Sealant more info...	63909	EA	3.435	12 EA	41.22 USD	<input checked="" type="checkbox"/>
Manufacturer Name: Liquid Nails Manufacturer Part Number: 407634 Supplier Part Auxiliary ID: 407634 more info...	Commodity Code: 52100 Maintenance, Repairs, Operating Supplies	Internal note Internal Attachments Note for supplier				

- Click on the **Go** button to the right of the drop-down menu. This will open up a text field where you will enter the commodity code.

For selected line items Change Commodity Code **Go**

PO Number To Be Assigned **edit**

Quote/Contract number *no value*

Required field

[View/edit by line item...](#)

- Type the commodity code (again, of the highest dollar amount item) in the text field.
- Click on the **Save** button.

Change Commodity Code ? X

Save **Cancel**

Commodity Code

- The commodity code which you typed will now be present in all lines on the PR.

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	12oz Can Touch N' Seal[REG] All Direction Dispensing Foam more info...	63800	EA	4.3547	12 EA	52.26 USD	<input type="checkbox"/> edit
	Manufacturer Name: CONVENIENCE PRODUCTS Manufacturer Part Number: 4004521212 Supplier Part Auxiliary ID: 4004521212 more info...	Commodity Code: 71750 Safety & Security Supplies	Internal note: <i>no note</i> Internal Attachments: <input type="button" value="Add Attachments"/> Note for supplier: <i>no note</i> Attachments for supplier: <input type="button" value="Add Attachments"/>				
2	10.1oz Cartridge Clear Latex Liquid Nails[REG] Window/Door Caulk Sealant more info...	63909	EA	3.435	12 EA	41.22 USD	<input type="checkbox"/> edit
	Manufacturer Name: Liquid Nails Manufacturer Part Number: 407634 Supplier Part Auxiliary ID: 407634 more info...	Commodity Code: 71750 Safety & Security Supplies	Internal note: <i>no note</i> Internal Attachments: <input type="button" value="Add Attachments"/> Note for supplier: <i>no note</i> Attachments for supplier: <input type="button" value="Add Attachments"/>				
3	6ft Green Snap Hook Tie Back 310lb WLL Shock Absorbing Lanyard more info...	1007376	EA	146.3775	4 EA	585.51 USD	<input type="checkbox"/> edit
	Manufacturer Name: Honeywell Safety Products Manufacturer Part Number: 913B/6FTGN Supplier Part Auxiliary ID: 913B/6FTGN more info...	Commodity Code: 71750 Safety & Security Supplies	Internal note: <i>no note</i> Internal Attachments: <input type="button" value="Add Attachments"/> Note for supplier: <i>no note</i> Attachments for supplier: <input type="button" value="Add Attachments"/>				

- Proceed with any other necessary changes to the PR before submitting to Banner. You would use this same process for any hosted catalog orders.

NOTE: if you have equipment and supplies on the same purchase requisition, you must make sure that your Account Code(s) reflect this.