

PO.020.121 – CREATING A PURCHASE ORDER FROM A PROCUREMENT CONTRACT

Purpose	<ul style="list-style-type: none"> To create a Purchase Order from a Contract. To identify the two different options on creating a Purchase Order from a Contract.
Description	<p>Purchase Orders can be created from a contract in two ways – by entering all contract fields manually or by copying from an existing contract.</p> <p>Contracts fall into one of three categories: Agency, Statewide, and University System of Georgia (USG). Institutional Contract Admins are responsible for adding and maintaining institution-specific contracts (Agency). Statewide contracts are entered by the University System Office (USO) for all institutions to reference on procurement transactions. USG contracts are entered by USO for institutions to reference contract documentation, but not to reference on procurement transactions.</p> <p>Additionally, Procurement Contracts for all institutions are entered into the POCON SetID. Since this is a shared SetID, institutions have access to contracts they did not enter. It is imperative users only update Agency contracts for their specific institution.</p>
Security Role	BOR_PO_MAINTAIN
Assumptions	Procurement Contract exists in PeopleSoft. For more information on how to verify the contract exists in PeopleSoft, PC.010.012 – Inquiring on a Procurement Contract.
Dependencies/ Constraints	An institution must use SHARE Suppliers to create a Procurement Contract. Once a contract is created, it can be referenced on a Purchase Order.

Additional Information

A supplier may have multiple contracts in the system. If a contract is copied to create a Purchase Order the following occurs:

- If the Auto Default option is selected on a single contract, this contract defaults in the Contract ID field on the Purchase Order line no matter what contract is used to create the Purchase Order.
- If the Auto Default option is selected on all contracts for the supplier, the contract with the most recent Begin Date defaults in the Contract ID field on the Purchase Order line no matter what contract is used to create the Purchase Order.
- If the Auto Default option is selected on a contract where contract line items are listed, and this contract is used to create the Purchase Order, this contract defaults in the Contract ID field on the Purchase Order line.

Procedures

Below are step by step instructions on how to create a Purchase Order by copying from an existing contract.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Add/Update POs link.
6.	On the Add a New Value tab, click the Add button. The system navigates to the Maintain Purchase Order page.
7.	Select Contract from the Copy From dropdown menu. The Copy Purchase Order from Contract popup window appears.
8.	<p>Enter any known information into the search fields on the Copy Purchase Order from Contract page and click Search. The system returns search results under Select Contract based on criteria entered.</p> <p>Note: <i>If the search results do not produce the contract needed there may be an issue with the contract setup. If the contract is an Open Item Contract, verify the Allow Open Item Reference box is checked. See Step 25 of Business Process PC.010.010 – Adding a Procurement Contract.</i></p> <p><i>If the contract has line items, verify the Base Price has an amount greater than \$0 to appear in the search results. See Step 7 of Business Process PC.010.011 – Adding Contract Items to a Procurement Contract.</i></p>
9.	<p>Review search results to find contract needed to create the Purchase Order.</p> <p>Note: <i>A supplier may have multiple contracts in the system.</i></p>
10.	Click the checkbox under Select next to the contract needed to create the Purchase Order.
11.	Click OK .
12.	Verify Supplier and Supplier ID populated.
13.	Enter the Buyer into the Buyer field.
14.	Verify the Contract ID defaults into the PO Reference field. If the Contract ID does not default, enter the Contract ID into the PO Reference field.
15.	Navigate down to the Lines box.

Step	Action
16.	For an Open Item contract, enter the PO Line information under the Details tab. Open Item Contract information includes: <ul style="list-style-type: none"> • Description • PO Qty • UOM • Category • Price
17.	Click the Contract tab. Verify the Contract ID field and Contract Line field populate if the procurement contract has defined line items. For an Open Item Procurement Contract, the Contract ID field needs to be manually entered, or users can use the search icon to find the Contract ID, if the auto default checkbox is not selected on the contract. If the Auto Default checkbox is checked on the contract the Contract ID defaults onto the Purchase Order line automatically. <i>Note: For a Procurement Contract with line items, the line information is copied into the Purchase Order.</i>
18.	Enter Schedule and Distribution information, following Steps 25 – 33 as outlined in PO_020_140 – Creating a PO or Amount Only PO .
19.	Click the Save button to save the Purchase Order.

Below are step by step instructions on how to create a Purchase Order by manually entering all contract fields.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Add/Update POs link.
6.	On the Add a New Value tab, click the Add button. The system navigates to the Maintain Purchase Order page.
7.	Enter the Supplier into the Supplier field.
8.	Enter the Supplier ID into the Supplier ID field.
9.	Enter the Buyer into the Buyer ID field.
10.	Enter PO Reference , if desired.
11.	Navigate down to the Lines box.
12.	Click on the Contract tab.
13.	Click on the Contract Search icon located between the Description and SetID fields.
14.	Enter desired search criteria.
15.	Click the Search button.
16.	Review search results to find contract needed to create the Purchase Order.
17.	Click the checkbox under Select next to the contract needed to create the Purchase Order.
18.	Click OK .
19.	<p>Click the Contract tab. Verify the Contract ID field and Contract Line field will be populate if the procurement contract has defined line items.</p> <p>For an Open Item Procurement Contract, the Contract ID field needs to be manually entered, or users can use the search icon to find the Contract ID, if the auto default checkbox is not selected on the contract. If the Auto Default checkbox is checked on the contract the Contract ID defaults onto the Purchase Order line automatically.</p> <p>Note: For a Procurement Contract with line items, the line information is copied into the Purchase Order.</p>
20.	Verify the Contract ID field is now populated.

Step	Action
21.	<p>For an Open Item contract, enter the PO Line information under the Details tab. Open Item Contract information includes:</p> <ul style="list-style-type: none"> • Description • PO Qty • UOM • Category • Price <p>If the Contract has Contract line items, the fields on the PO line default with the information populated on the contract. Edits to the PO Line fields can be made, if needed.</p>
22.	<p>Enter Schedule and Distribution information following Steps 25 – 33 as outlined in PO 020 140 – Creating a PO or Amount Only PO.</p>
23.	<p>Click on the Save button to save the Purchase Order.</p>