Create a PO against an existing Contract (using Contract Order Form) 1.8.25

(i) **When do I use this transaction?**

In DASH, you can not pay an invoice against a contract. When a contract is completed in the contract system, a purchase agreement is created. To process a payment against a purchase agreement, a PO must be created. To create a PO, this transaction is used. This transaction will create a PO that is automatically approved after it goes to Accounts Payable for audit purposes. It is automatically approved (after AP review) because there is an existing purchase agreement/contract in place. The PO that is created is used to pay invoices from the supplier. Each time an order is placed with the supplier, the Contract Order Form is used to create a PO in order for the department to process a payment.

⚠ **Alert!** There are two different Contract Order Forms: one to use for software purchases and the other form is for any other type of purchase.
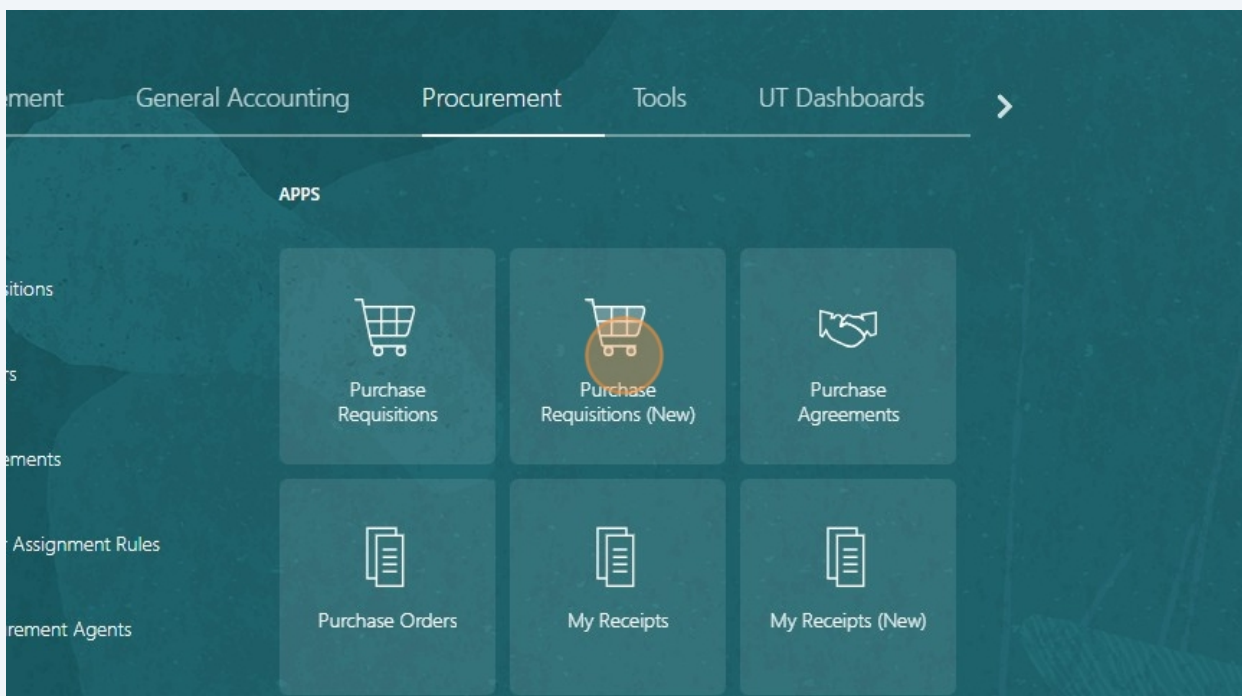
⚠ **Alert!** Accounts Payable will still audit contract purchases but workflow will be a little different. The requisition will route to Accounts Payable before the PO is generated. If you are creating the PO to pay an invoice, please attach your invoice to the requisition.

If you need to create a PO because the supplier requires one, you will add a comment to the justification field in requisition summary. This step is explained later in this document.
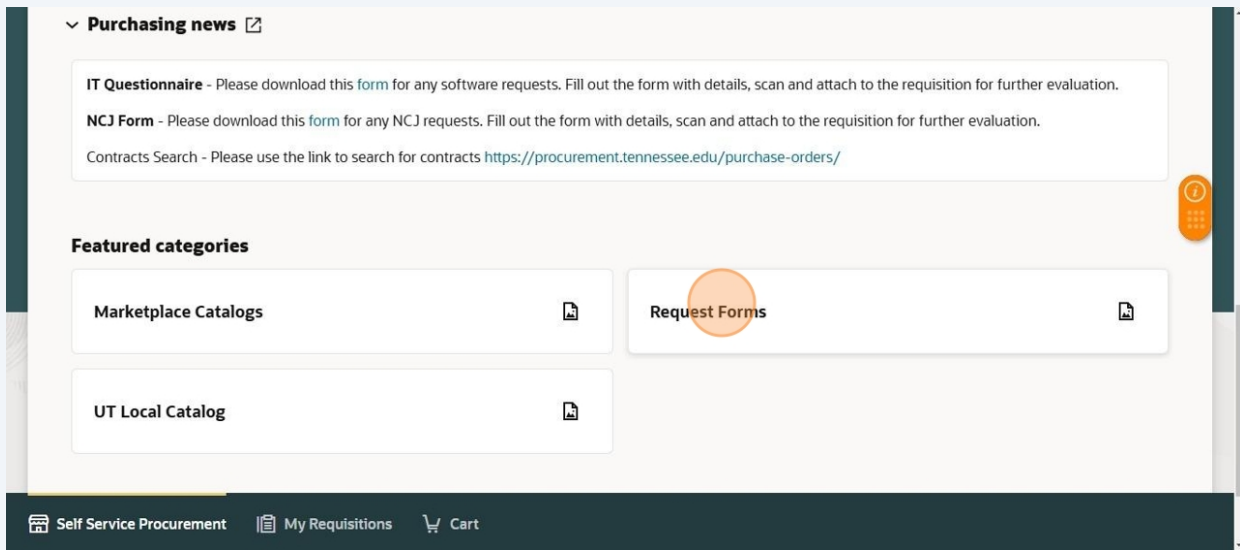
**1** Click "Procurement", if you do not see Procurement, click the ">" for more options.
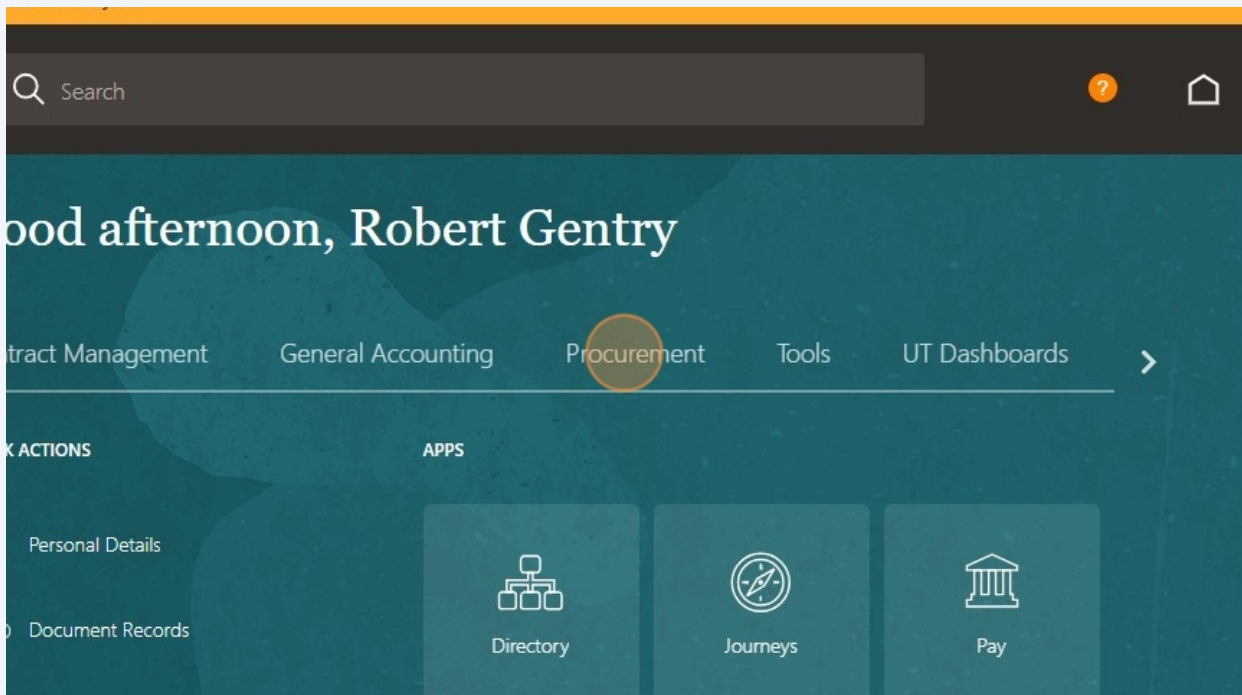
2 Click "Purchase Requisitions (New)"

3 Scroll down to Featured Categories and click "Request Forms"

∨ **Purchasing news** ⬈

IT Questionnaire - Please download this form for any software requests. Fill out the form with details, scan and attach to the requisition for further evaluation.

NCJ Form - Please download this form for any NCJ requests. Fill out the form with details, scan and attach to the requisition for further evaluation.

Contracts Search - Please use the link to search for contracts https://procurement.tennessee.edu/purchase-orders/

Featured categories

Marketplace Catalogs   Request Forms

UT Local Catalog

🏬 Self Service Procurement   📋 My Requisitions   🛒 Cart

4 Select Contract Order Form by clicking "Create Request"

Contract Order Form   Sub Award Form

Create Request   Create Request

Purchase Agreement Order Form
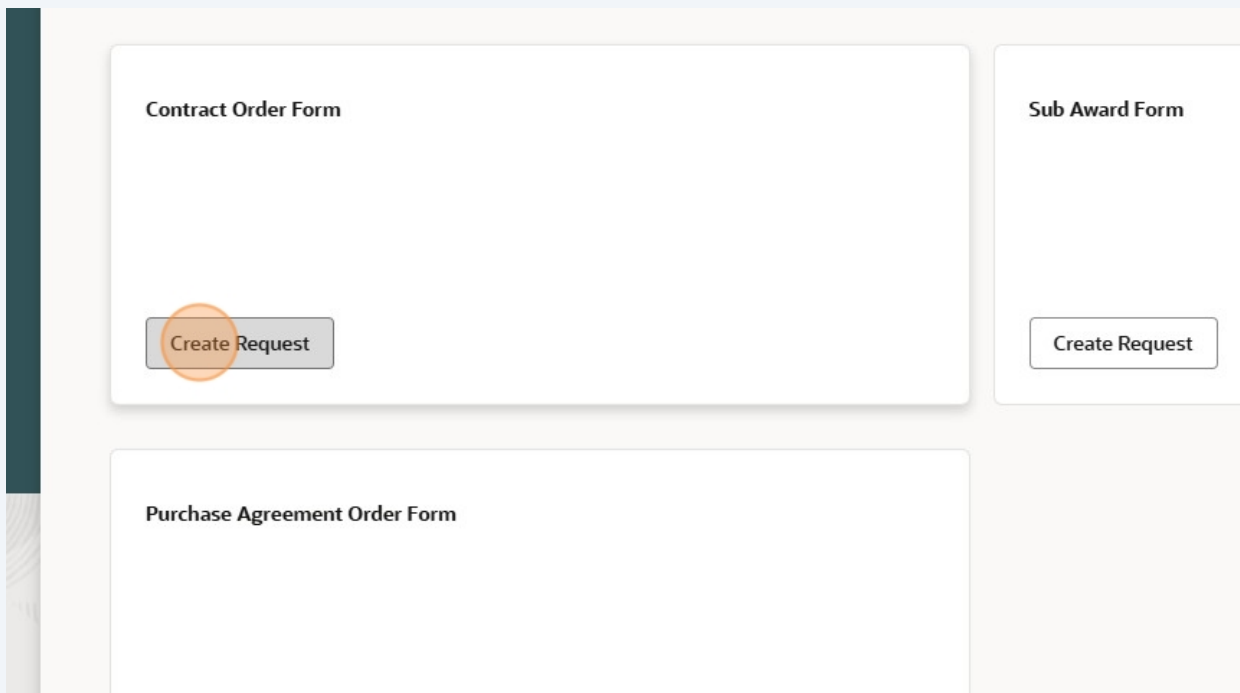
5   Enter the Description for the purchase

Create Request

Contract Order Form

Use this form to create a requisition against a "95" contract

Item Description

Item Type	
Fixed Price Services	Category

⚠️ Alert! It is important to select Miscellaneous as your category. Otherwise, your requisition may not auto approve into a PO.

6 Click the "Category" field and choose "miscellaneous"

uest   Cancel

ler Form

create a requisition against a "95" contract

Appliances
Appliances

Athletics
Equipment, apparel, services, recruiting

Audio Visual
Equipment & services

Building & Construction
Material, paint, roofing, signage

Catering
Catering

es

vices

Category   ▾

Required

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7 Click and enter the "Amount"

Item Description
Building Supplies

Item Type
Fixed Price Services

Category
Miscellaneous

Pricing

Amount

Currency
USD

Required

☐ Negotiation required   ☑ Negotiated

Source

8 Click "Agreement"

USD

☑ Negotiated

Agreement ▼

Supplier Site

Supplier Item

ⓘ Tip! Enter the contract number into the "Agreement Field"

9 For example, type or paste the contract number into the "Agreement Field", then select from the drop down box.

USD

☑ Negotiated

Agreement
9500069147

Agreement	Supplier	Supplier Site
9500069147	ACME Block and Brick INC.	KINGSTONTN

⚠ Alert! This is very important. Be sure to enter the contract number and confirm it is in the "Agreement" Field as shown below.

If you enter a supplier name in the Supplier field and do not enter an agreement number in the Agreement field, the transaction will not automatically approve. Instead it will go through workflow and be rejected with a note to add the contract number.

The auto-approval is based on the contract number being present.

USD

☑ Negotiated

Agreement
9500069147

Agreement	Supplier	Supplier Site
9500069147	ACME Block and Brick INC.	KINGSTONTN

10 In the notes to supplier field, you can add anything you need to communicate on your purchase order.

Supplier ▾

Supplier Contact

Additional information

Notes

Note to Supplier
Reference Quote #12345678
Please deliver to the back of the building

Attachments

Category

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11 Scroll to the top of the page and click "Add to Cart"

RG

Cancel | Add to List | Add to Cart

Category ▾

12 If you need to add another line item, click "Create Another Request". Otherwise, click "View Cart" to proceed and finalize the requisition.

Create Request

Contract Order Form

Use this form to create a requisition against a '

Item Description
Building Supplies

✓ Confirmation   ✕

Request added to cart
You can view your cart or create another request with the same supplier.
View Cart
Create another request

Item Type
Fixed Price Services

Category
Building & Construction

Pricing

13 From the Cart screen, click Requisition Summary "edit/pencil" icon.

⌂ 🔔 RG

Actions ▾   Submit

ⓘ

🗑 ✏

Requisition summary ✏

Subtotal	$12,000.00
Estimated Tax	$0.00
Approval Amount	**$12,000.00**

Description

Requester
Robert Gentry

⚠️ Alert! If you need to send this PO to the supplier because the supplier requires a PO in addition to the contract, you will need to put the following information in the "Justification" field: "Supplier requires purchase order"

14 Click the "Justification" field.

Description

Justification
Supplier requires purchase order

Delivery

Requester
Abigail Shellist

Requested Delivery Date
12/16/2024

Deliver to Location
UT Tower_10_1004

15 Scroll down to Charge Account and confirm the correct account is selected. If the default Charge Account is correct, you can skip down to Step 36

Project Number

Charge account

◉ Select favorite charge account   ○ Enter charge account number

Charge Account Nickname
Chad Supplies

ⓘ 10-1100001-106006-539100-000-0000-00-0000

Budgetary control

Budget Date
11/8/2024

ⓘ Tip! If you have saved multiple charge accounts to your Preferences, you can find them by clicking the drop-down in the "Charge Account Nickname" field.

Charge account

◉ Select favorite charge account   ○ Enter charge account number

Charge Account Nickname
Chad Supplies

Chad Supplies
10-1100001-106006-539100-000-0000-00-0000
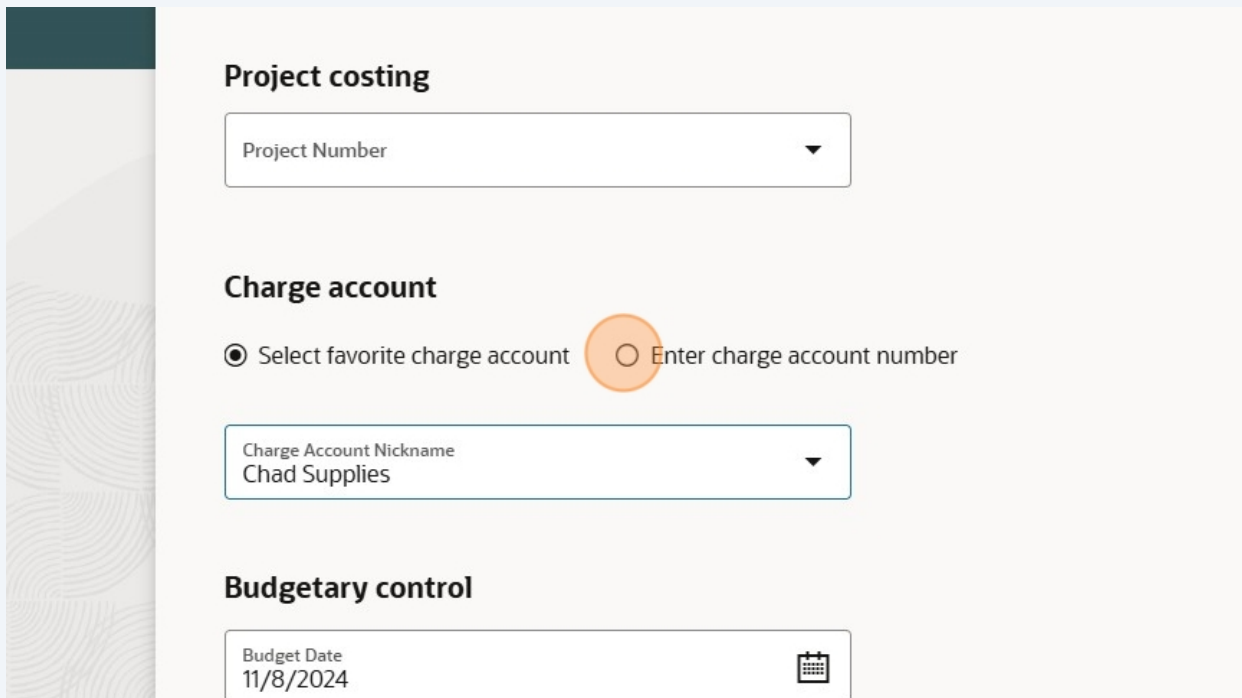
Budget Date
11/8/2024

Additional information

Requisition Type
UT Contract

Bill-to Location

16 To add a charge account, click the "O" to select "Enter Charge Account Number"

Project costing

Project Number ▼

Charge account

● Select favorite charge account   ○ Enter charge account number

Charge Account Nickname
Chad Supplies ▼

Budgetary control

Budget Date
11/8/2024 🗓

ⓘ Tip! There are multiple ways to enter a new charge account. See the options below and select the option that works best for you.

17   Click the "Charge To" field and delete the charge account
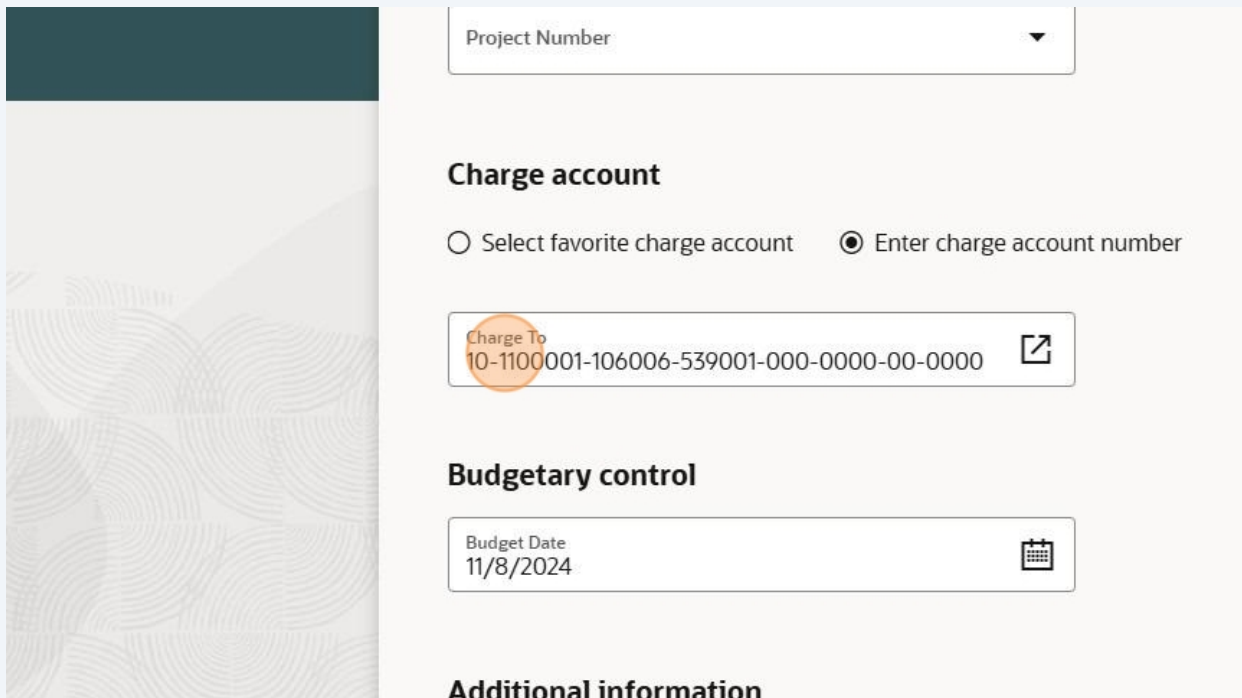
ℹ️ Tip! You can copy and paste your charge account into the "Charge To" field or manually enter it.
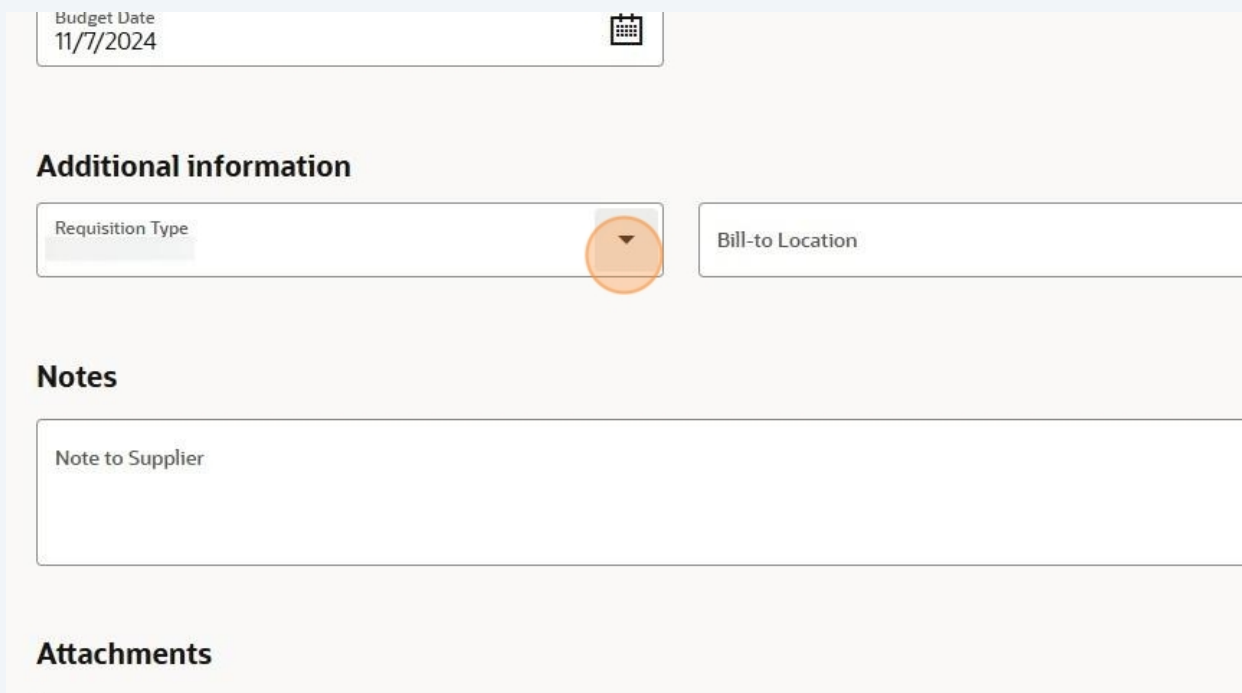
18 The new Charge Account is set for this transaction

Project Number ▼

Charge account

○ Select favorite charge account   ● Enter charge account number

Charge To
10-1100001-106006-539001-000-0000-00-0000   ⬈

Budgetary control

Budget Date
11/8/2024   📅

Additional information

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19 Scroll down and click "Requisition Type"

Budget Date
11/7/2024   📅

Additional information

Requisition Type   ▼

Bill-to Location

Notes

Note to Supplier

Attachments

20   Click "Purchases made against a negotiated UT contract"

Requisition Type		Bill-to Location
UT Contract	▼	

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source- NCJ Required Attach NCJ form to transaction

Sole Source- No NCJ Required Per FI0405, NCJ form is not required

Standard Purchase- No NCJ required Standard Purchase - No NCJ required

State of TN Contract Provide the state contract number

Sub Award Use for payable sub award contracts

UT Contract Purchases made against a negotiated UT contract

Select or drop files here

ⓘ   Tip! Always select "Purchases made against a negotiated UT contract" for Contract Order Form transactions.
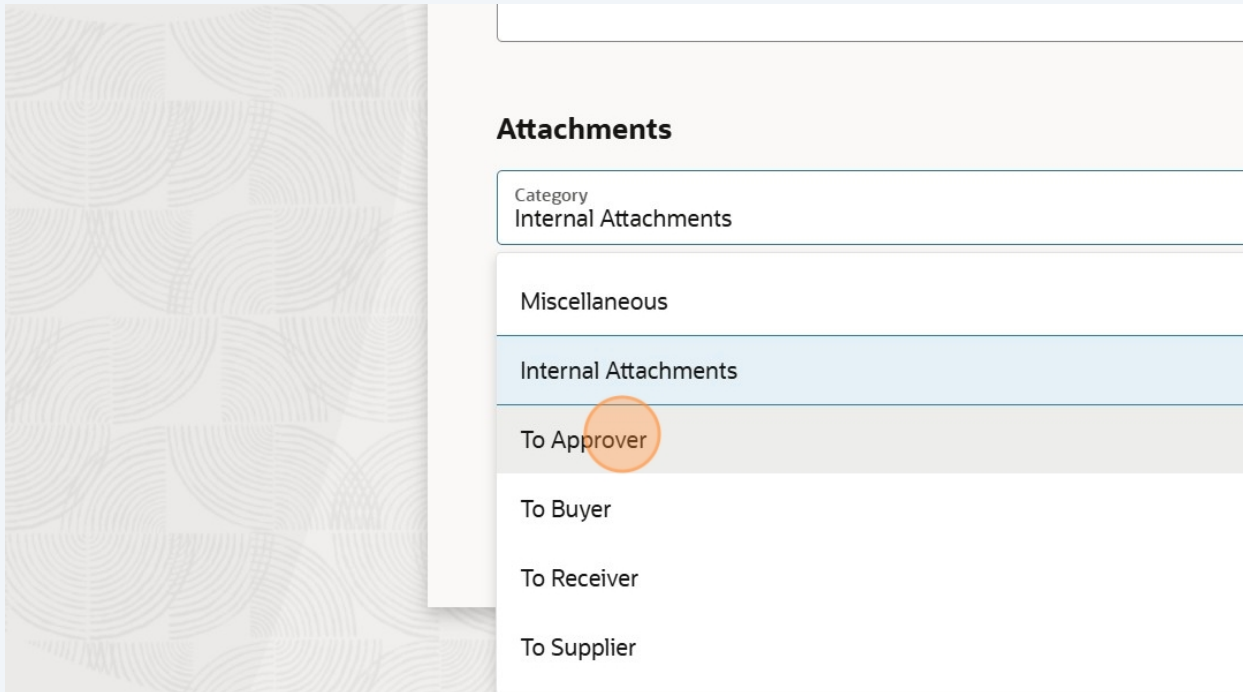
ⓘ   Tip! "Requisition Type" is the only required field on this page.

⚠   Alert! If you are creating your PO in order to pay your invoice you must attach your invoice to the requisition.
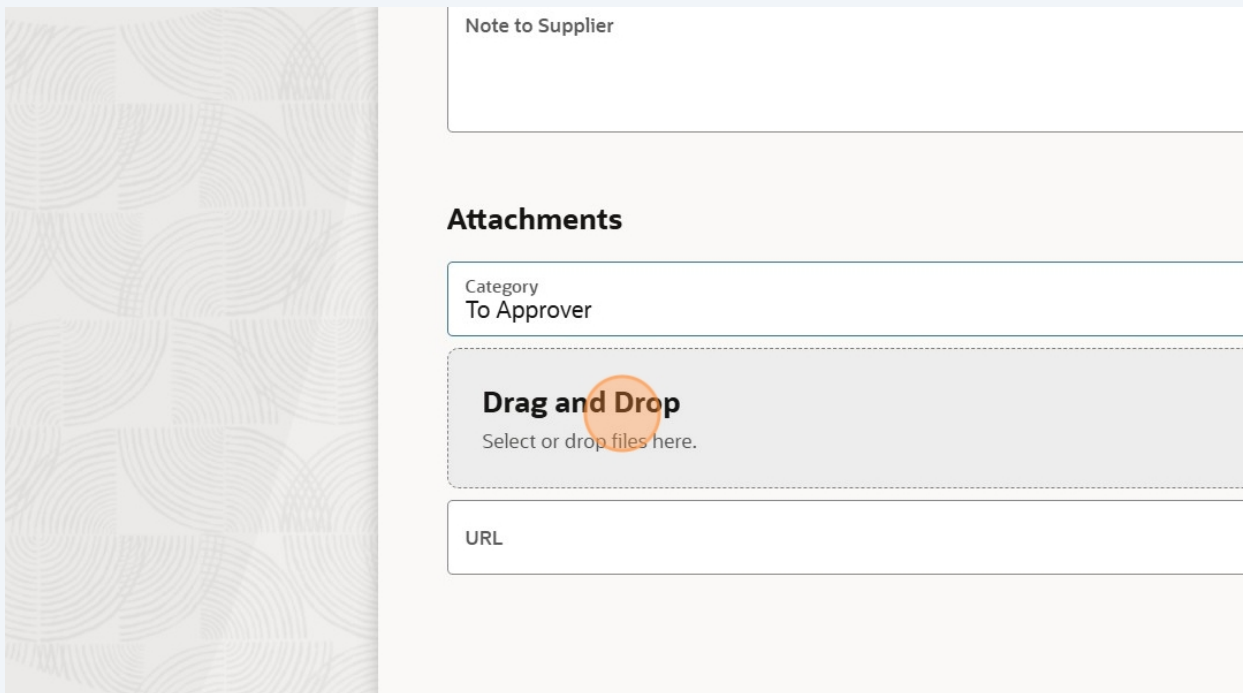
21 Under attachments category, click on "to approver"

Attachments

Category
Internal Attachments

Miscellaneous

Internal Attachments

To Approver

To Buyer

To Receiver

To Supplier

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22 You can drag or drop or upload your invoice here.

Note to Supplier

Attachments

Category
To Approver

Drag and Drop
Select or drop files here.

URL

23 Attach your invoice

Attachments

Category
To Approver

Drag and Drop
Select or drop files here.

URL

To Approver
Invoice.docx
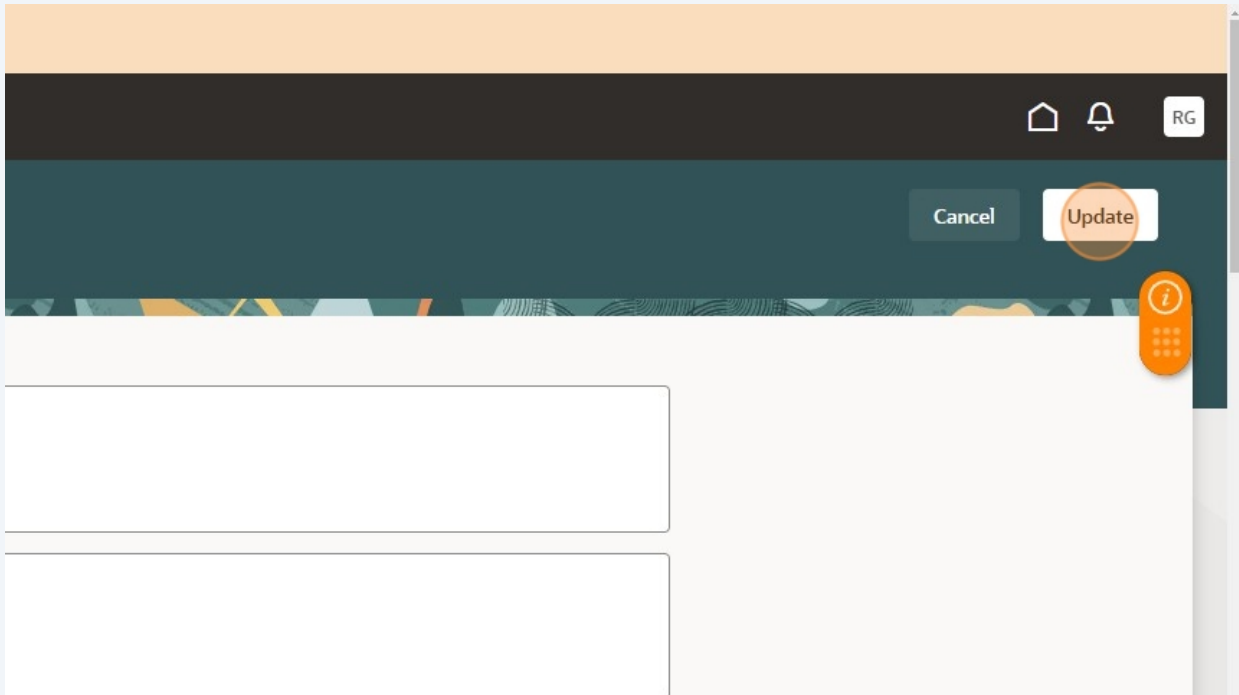12.91 KB

Last updated on 12/11/2024

24 To change the "Requested Delivery Date" click the "Calendar" icon. The requested delivery date defaults to 7 days from the creation date of the transaction, unless revised.
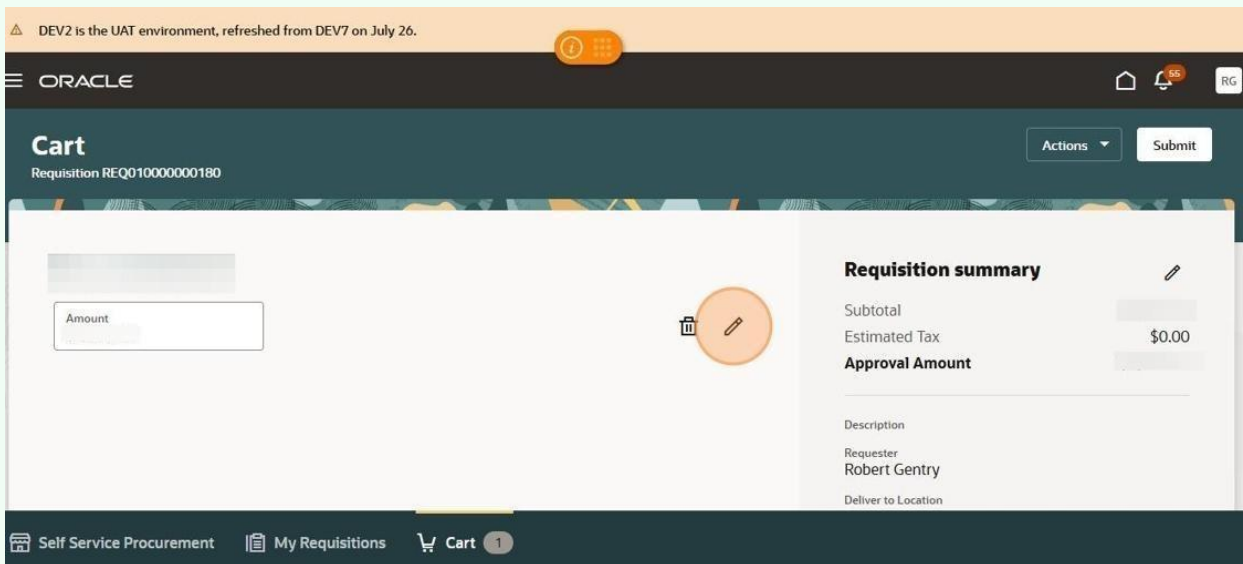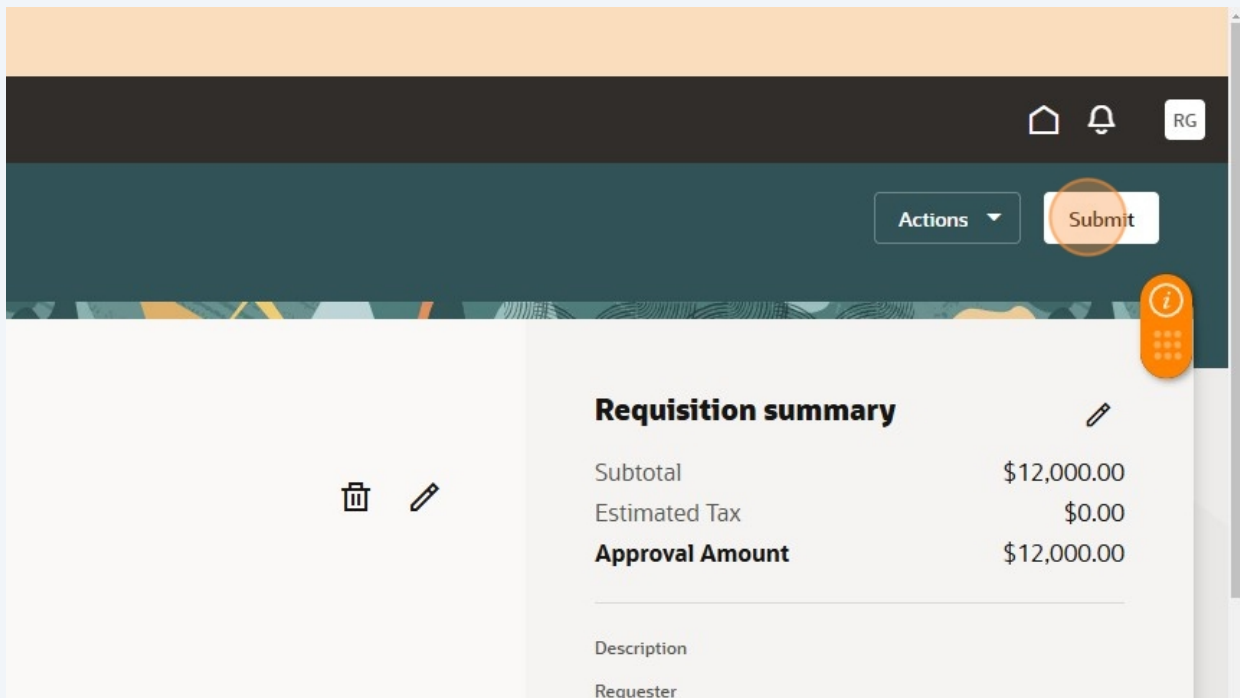
Requested Delivery Date
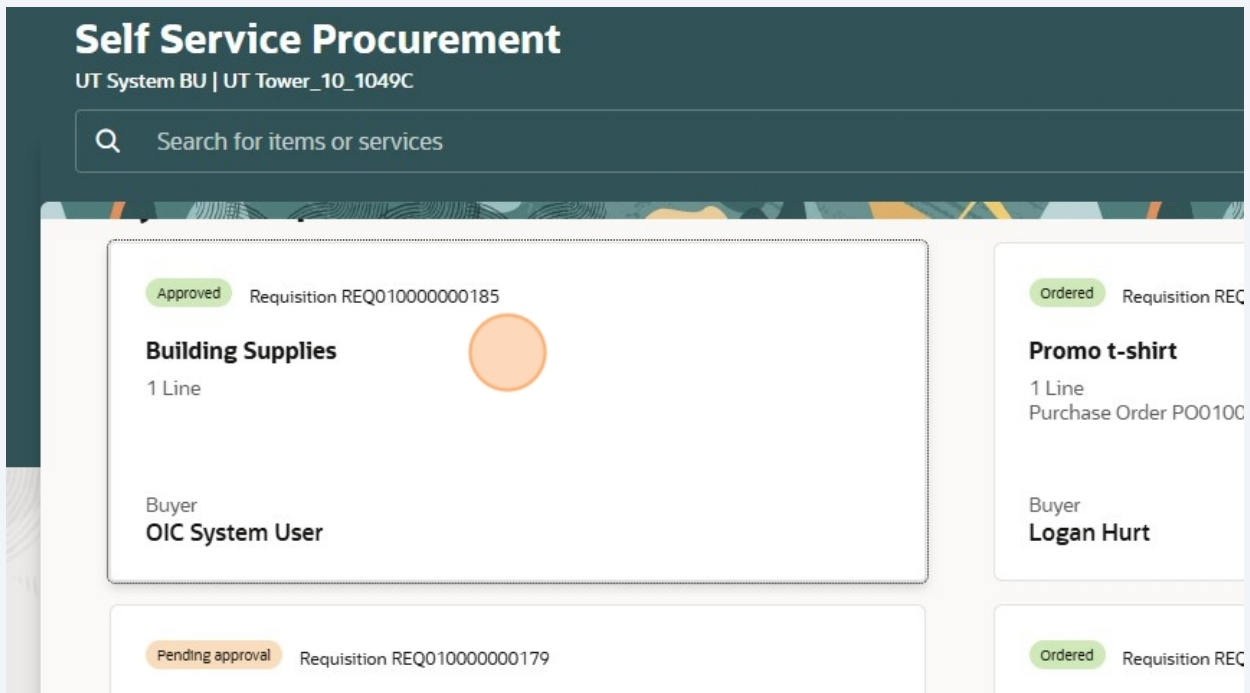11/12/2024

25 Click "Update" to save

ⓘ Tip! To revise the line item, click the "edit/pencil" icon. This is not a required step to complete the transaction. If no change is required (such as splitting the line item into multiple GL codes), skip this step and move to the next.

26 Click "Submit"

27 The transaction is available for review under "My Recent Requisitions"

28 After a few moments, the system will generate a PO from your requisition.

29 You can click on the hyperlink to your PO to view details.

30 Click "Order Life Cycle"

The purchase order is comprised of supply items.

Supplier
ACME Block and Brick INC.

Supplier Site
KINGSTONTN

Ship-to Location
UT Tower_10_1004

Requester
Abigail Shellist

Schedules   Order Life Cycle   Additional Order Details   Order History

Line - Schedule	Description
1-1	Supplies

31 Click "Additional Order Details"

The purchase order is comprised of supply items.

Supplier
ACME Block and Brick INC.

Supplier Site
KINGSTONTN

Ship-to Location
UT Tower_10_1004

Requester
Abigail Shellist

Schedules   **Order Life Cycle**   Additional Order Details   Order History

Ordered

32 Under additional details, you can see the contract number that was used as the source agreement.

Schedules   Order Life Cycle   **Additional Order Details**   Order History

Procurement BU
UT Procurement BU

Requisitioning BU
UT System BU

Related documents

Requisition
REQ010000000201

Source Agreement
9500069095

Supplier communication

Supplier Contact
HEATHER BROWNE

Communication Method
None

Terms

33 Congratulations! You have successfully submitted a Contract Order Form!

⚠ Alert! This transaction is not sent to the supplier. To place an order, you must contact the supplier. You can email a copy of this PO to the supplier if they need one for their records, but it is not required.

ⓘ Tip! The department will use this PO to pay the invoice from the supplier.