

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



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.



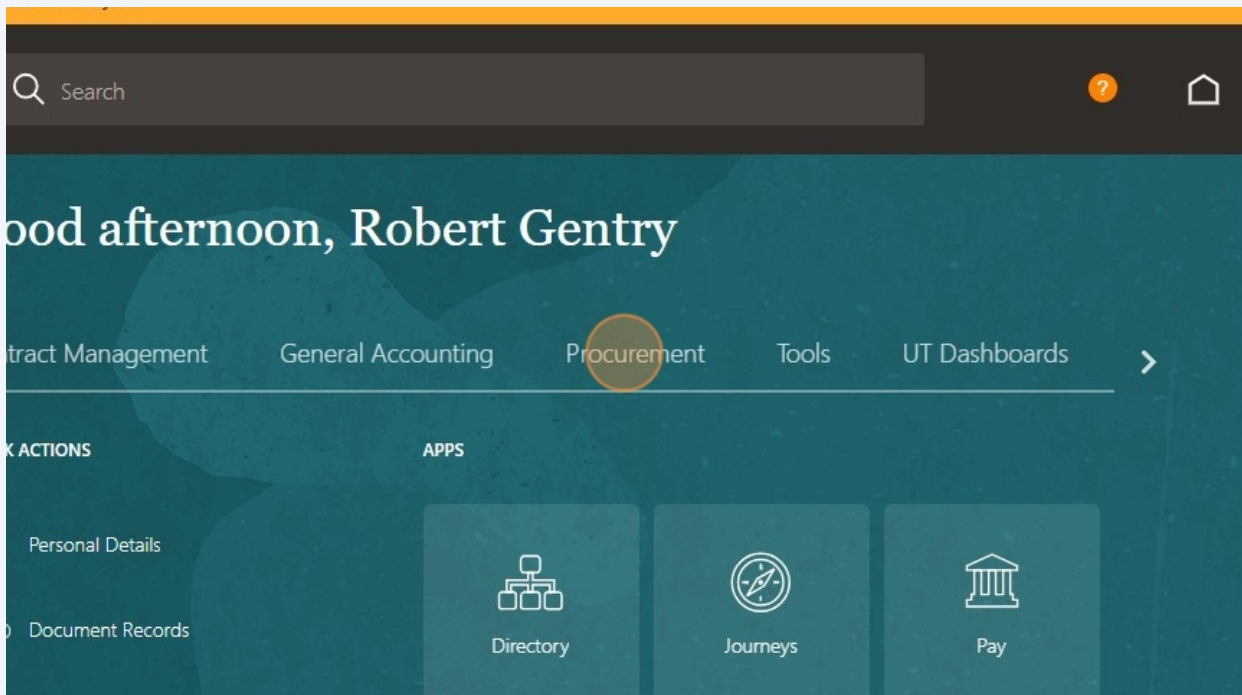
Alert! There are two different Contract Order Forms: one to use for software purchases and the other form is for any other type of purchase.



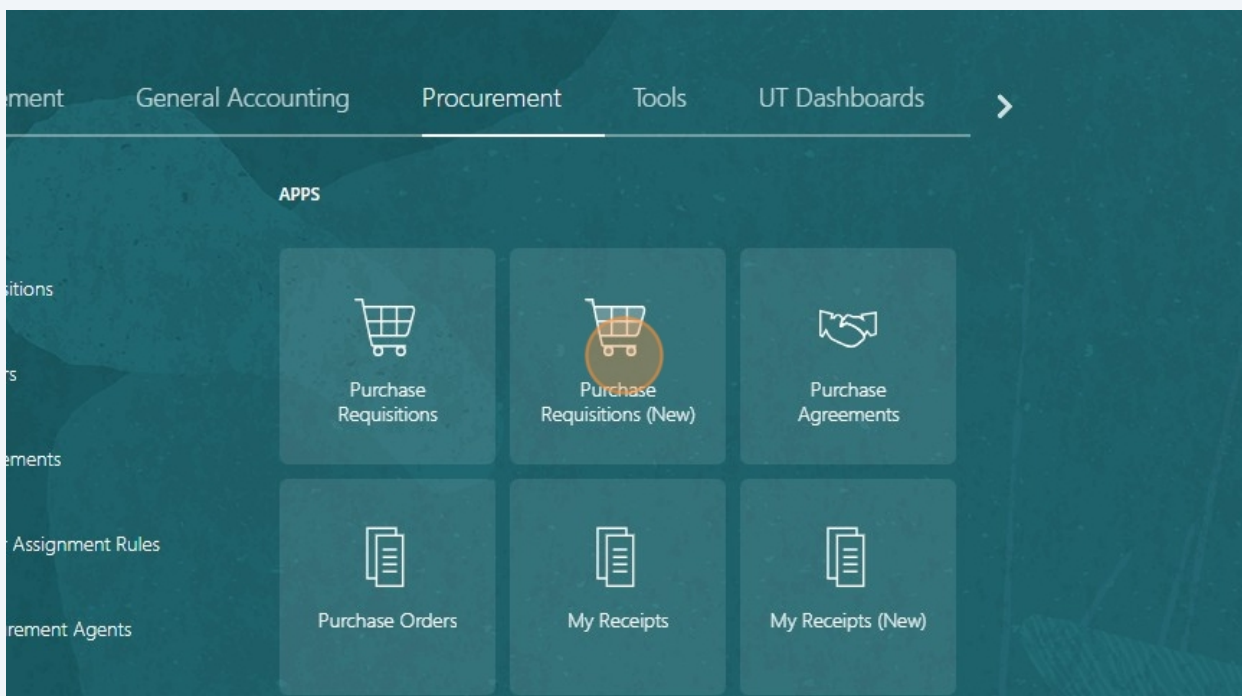
Alert! Accounts Payable will still audit contract purchases but workflow will be a little different. The requisition will route to Accounts Payable before the PO is generated. If you are creating the PO to pay an invoice, please attach your invoice to the requisition.

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.

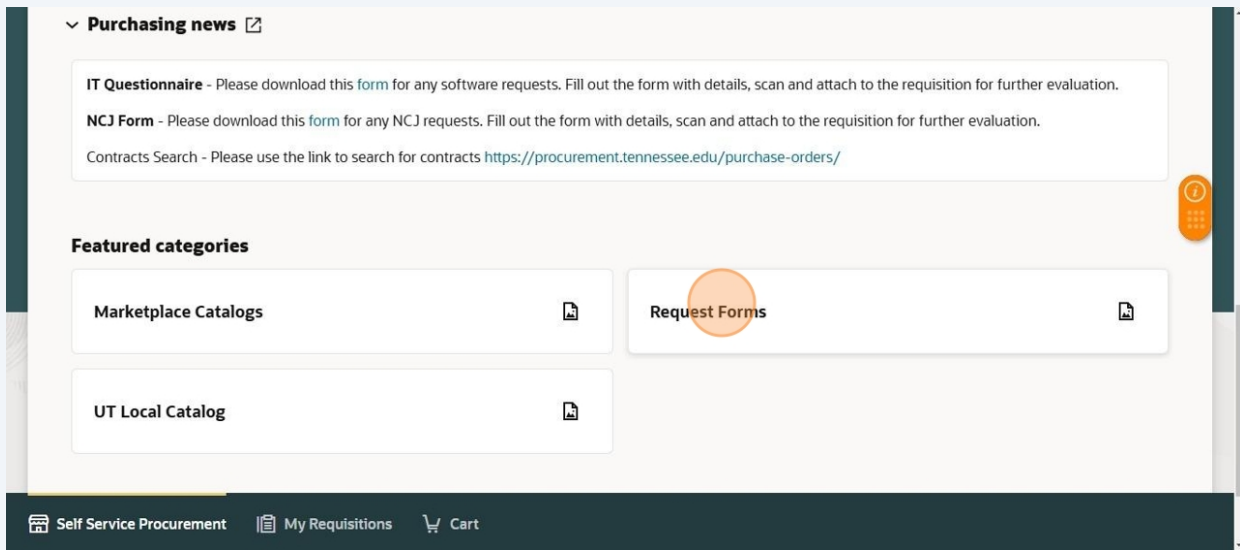
1 Click "Procurement", if you do not see Procurement, click the ">" for more options.



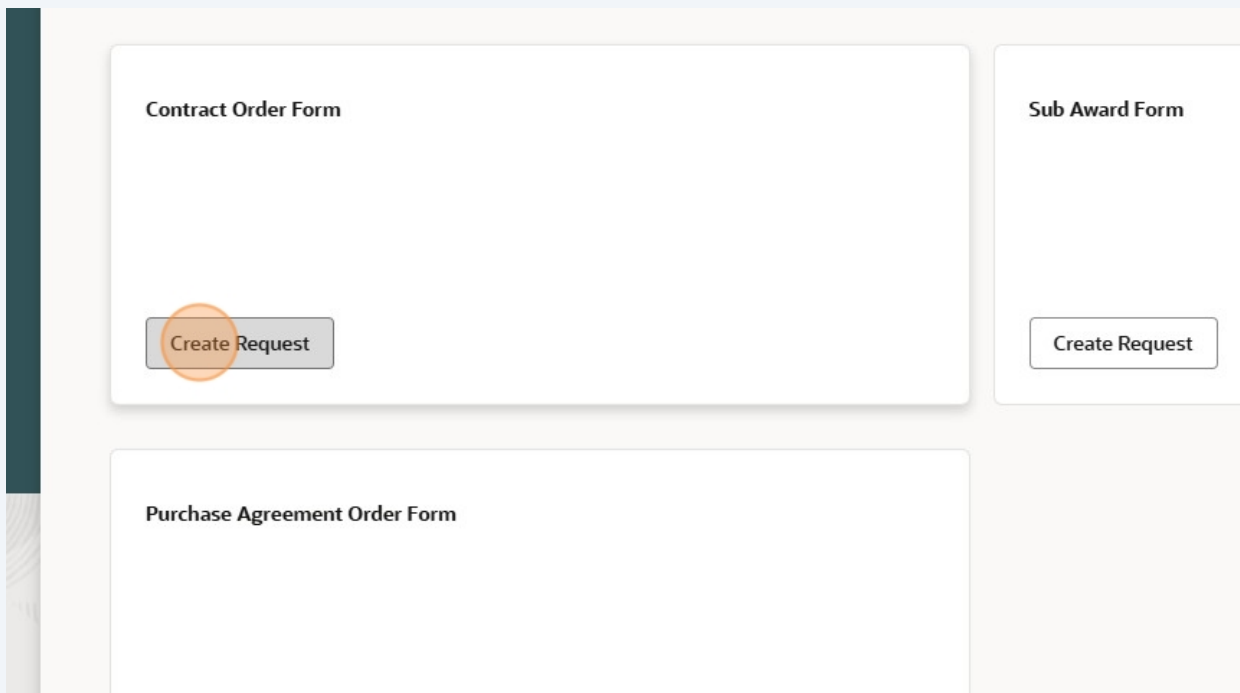
2 Click "Purchase Requisitions (New)"



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



**4** Select Contract Order Form by clicking "Create Request"



**5** Enter the Description for the purchase

The screenshot shows a web form titled "Create Request" with a dark teal header. Below the header, the form is titled "Contract Order Form" and includes the instruction "Use this form to create a requisition against a '95' contract". The form contains three main input fields: a large text area for "Item Description" with a small orange circle icon to its left, a dropdown menu for "Item Type" currently showing "Fixed Price Services", and a dropdown menu for "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"


The screenshot shows a requisition form with a dropdown menu open for the "Category" field. The dropdown menu lists several categories: Appliances, Athletics, Audio Visual, Building & Construction, and Catering. The "Category" field is highlighted with an orange circle, and the word "Required" is visible below it. The form includes a "Cancel" button in the top right corner and a "Requester Form" section with the text "create a requisition against a '95' contract".

7 Click and enter the "Amount"

The screenshot shows a requisition form with the "Amount" field highlighted by an orange circle. The form includes a "Pricing" section with a "Required" label below the "Amount" field. The "Category" field is set to "Miscellaneous" and is highlighted with a red border. The "Currency" field is set to "USD". There are checkboxes for "Negotiation required" (unchecked) and "Negotiated" (checked). The "Source" section is visible at the bottom.

**8** Click "Agreement"

A screenshot of a web form interface. At the top left, there is a dropdown menu showing "USD". Below it is a checked checkbox labeled "Negotiated". In the center, there is a dropdown menu with "Agreement" selected, highlighted by an orange circle. Below this are two more input fields: "Supplier Site" and "Supplier Item". On the right side of the form, there is a vertical sidebar with a dark blue header and a grey body, containing an orange information icon (a lowercase 'i' in a circle) and a vertical scrollbar.

 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.

The screenshot shows a form with the following elements:

- A "Supplier" dropdown menu.
- A "Supplier Contact" text input field.
- A section titled "Additional information".
- A section titled "Notes" with a text area containing:  
Note to Supplier  
Reference Quote #12345678  
Please deliver to the back of the building
- A section titled "Attachments" with a "Category" dropdown menu.

11

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

The screenshot shows a mobile app interface with the following elements:

- A dark navigation bar at the top with icons for home, notifications, and a user profile labeled "RG".
- A dark teal bar below the navigation bar containing three buttons: "Cancel", "Add to List", and "Add to Cart". The "Add to Cart" button is circled in orange.
- A large white text input field below the buttons.
- A "Category" dropdown menu at the bottom left.
- An orange information icon (i) in a circle on the right side of the screen.

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

Item Type  
Fixed Price Services

Category  
Building & Construction

### Pricing

✔ Confirmation

#### Request added to cart

You can view your cart or create another request with the same supplier.

[View Cart](#)

[Create another request](#)

13

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

Home, Notification, RG

Actions Submit

Requisition summary	
Subtotal	\$12,000.00
Estimated Tax	\$0.00
<b>Approval Amount</b>	<b>\$12,000.00</b>

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.

The screenshot shows a form with the following fields:

- Description**: An empty text input field.
- Justification**: A text input field containing the text "Supplier requires purchase order". This field is highlighted with an orange circle.
- Delivery**: A section header.
- Requester**: A dropdown menu with the selected value "Abigail Shellist".
- Requested Delivery Date**: A text input field with the value "12/16/2024".
- Deliver to Location**: A dropdown menu with the selected value "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 

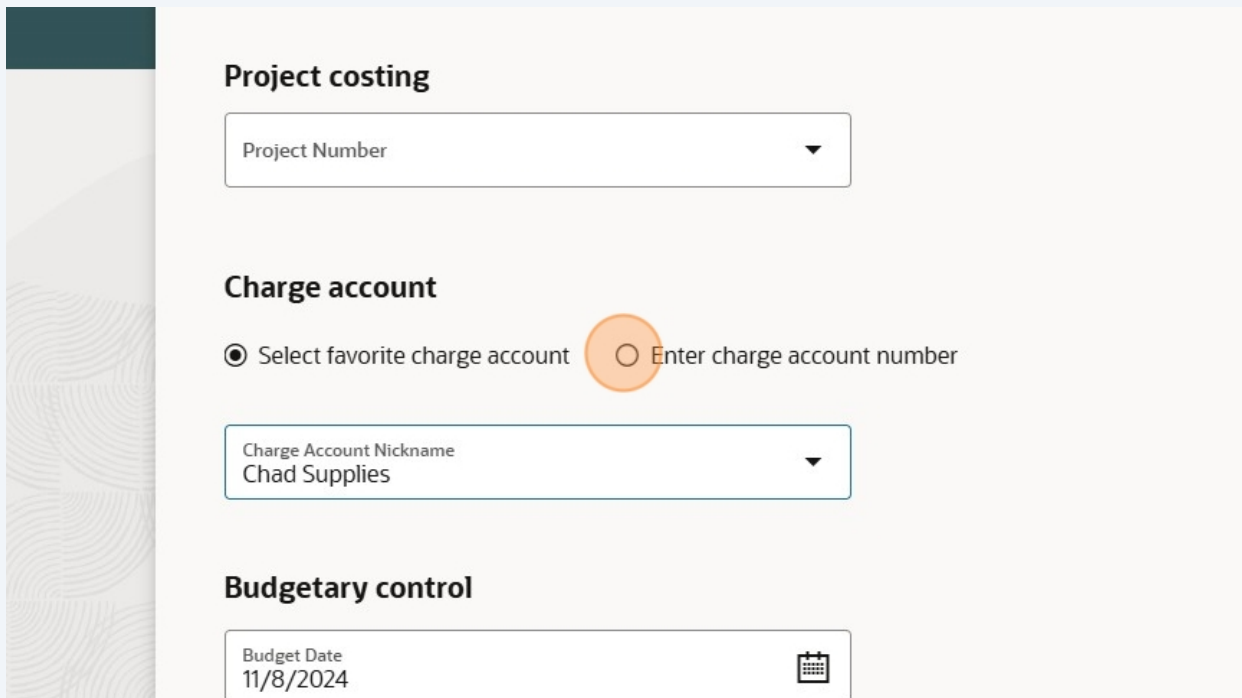
Budget Date  
11/8/2024 

### Additional information

Requisition Type  
IIT Contract 

Bill-to Location

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



The screenshot shows a form with three sections: **Project costing**, **Charge account**, and **Budgetary control**. The **Project costing** section has a dropdown menu labeled "Project Number". The **Charge account** section has two radio buttons: "Select favorite charge account" (which is selected) and "Enter charge account number" (which is highlighted with an orange circle). Below the radio buttons is a dropdown menu labeled "Charge Account Nickname" with the value "Chad Supplies". The **Budgetary control** section has a date field labeled "Budget Date" with the value "11/8/2024" and a calendar icon.



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

Project Number

**Charge account**

Select favorite charge account  Enter charge account number

Charge To  
-----0000|

**Budgetary control**

Budget Date  
11/8/2024

**Combination details**

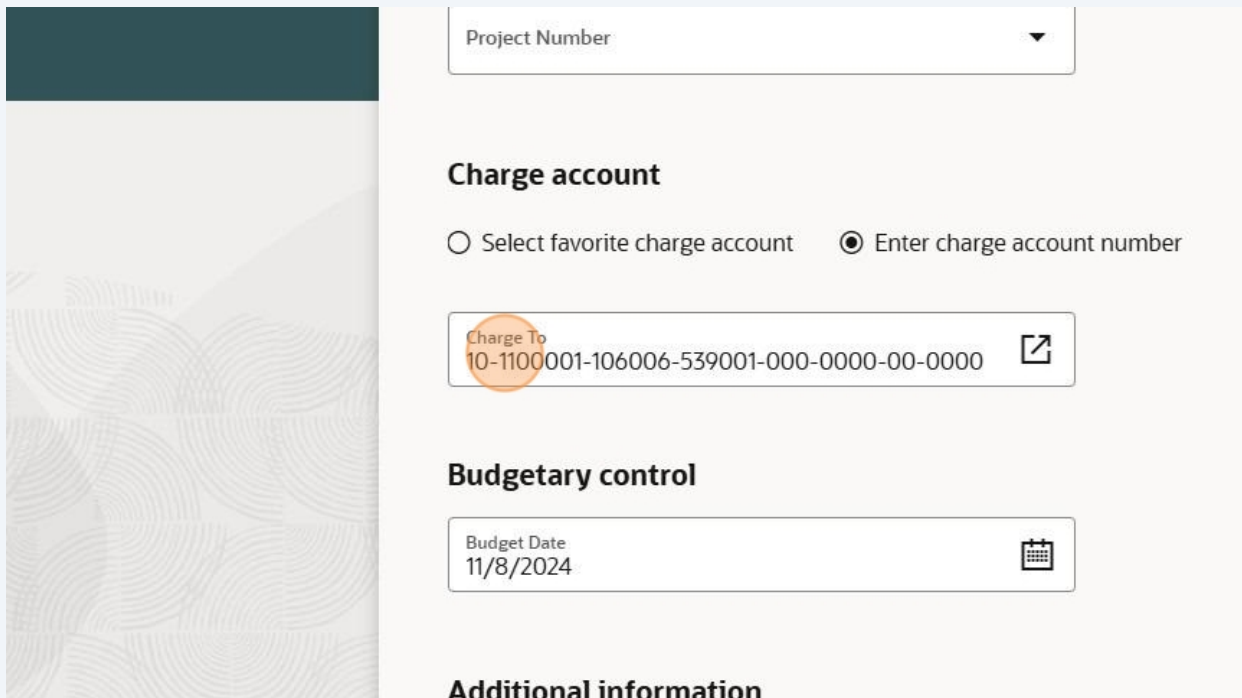
Segment	Value	Descr
Entity	-	-
Fund	-	-
Department	-	-

**Additional information**



Tip! You can copy and paste your charge account into the "Charge To" field or manually enter it.

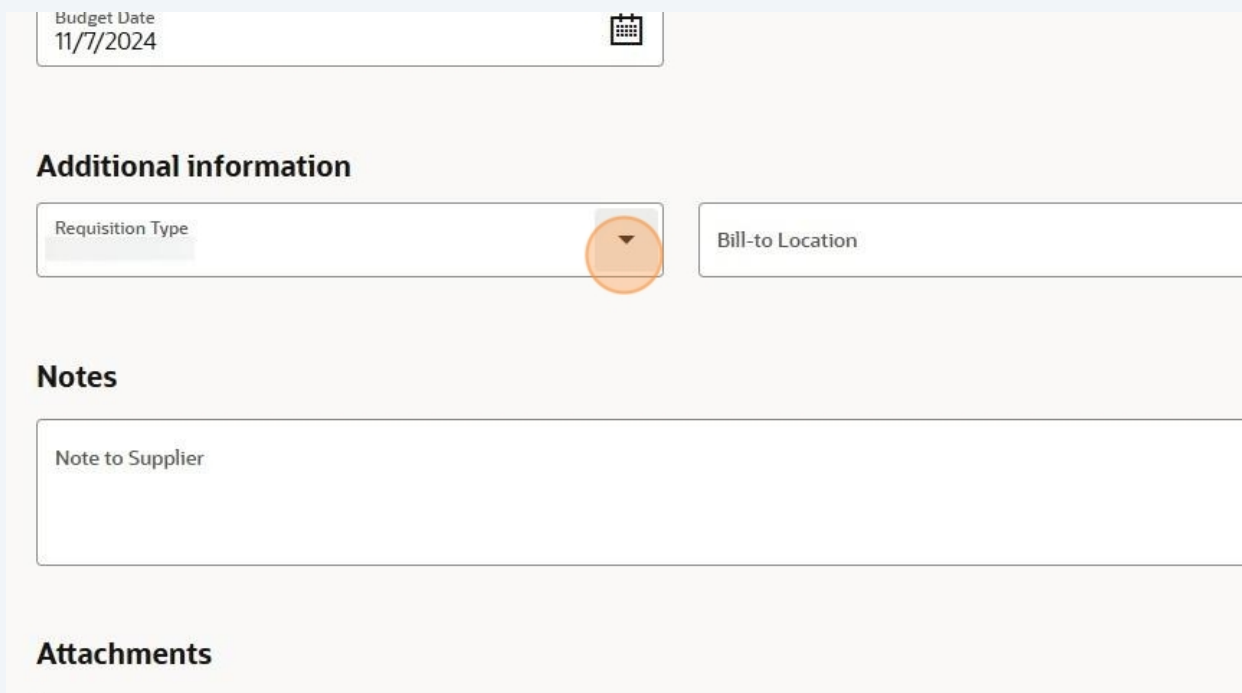
**18** The new Charge Account is set for this transaction



The screenshot shows a transaction form with the following elements:

- Project Number:** A dropdown menu.
- Charge account:** A section with two radio buttons: "Select favorite charge account" (unselected) and "Enter charge account number" (selected).
- Charge To:** A text field containing the account number "10-1100001-106006-539001-000-0000-00-0000" and an external link icon.
- Budgetary control:** A section with a "Budget Date" field set to "11/8/2024" and a calendar icon.
- Additional information:** A section header at the bottom.

**19** Scroll down and click "Requisition Type"



The screenshot shows a transaction form with the following elements:

- Budget Date:** A field set to "11/7/2024" with a calendar icon.
- Additional information:** A section containing:
  - Requisition Type:** A dropdown menu with a highlighted selection and a circular callout.
  - Bill-to Location:** A text field.
- Notes:** A section with a "Note to Supplier" text area.
- Attachments:** A section header at the bottom.

20

Click "Purchases made against a negotiated UT contract"

The screenshot shows a web form with two main input fields: "Requisition Type" and "Bill-to Location". The "Requisition Type" dropdown menu is open, displaying a list of options. The option "UT Contract Purchases made against a negotiated UT contract" is highlighted with a blue background and a red circle. The other options in the list are: "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", and "Sub Award Use for payable sub award contracts".



Tip! Always select "Purchases made against a negotiated UT contract" for Contract Order Form transactions.



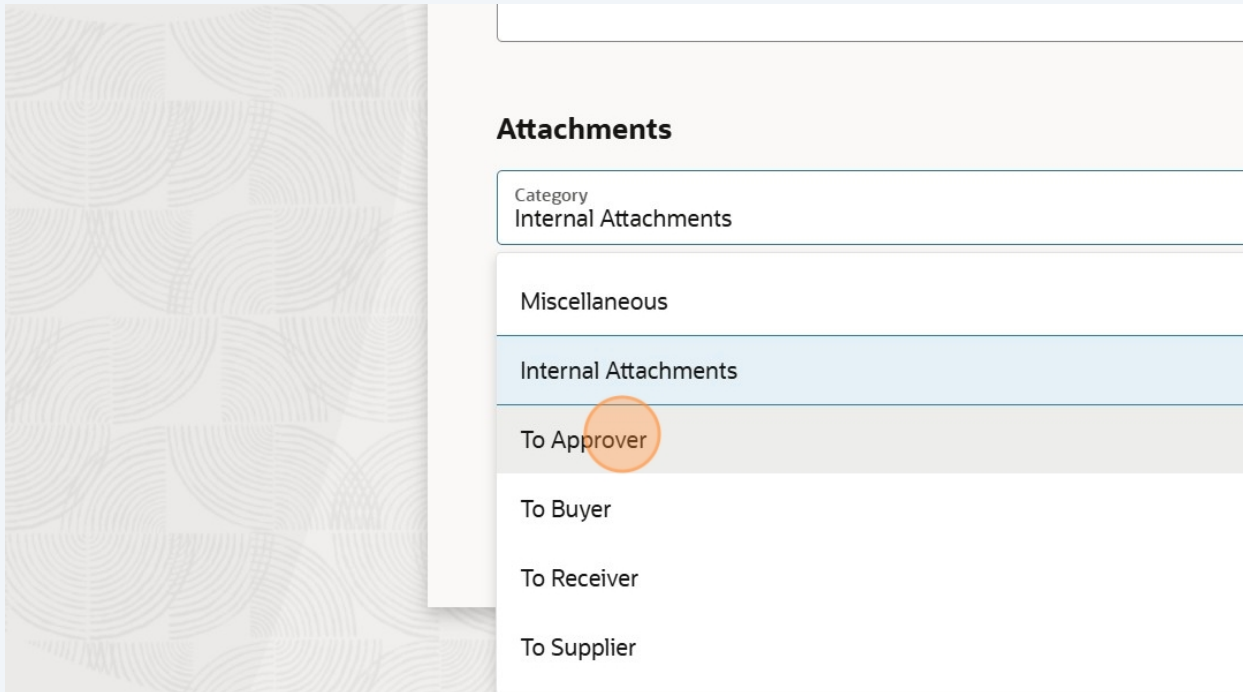
Tip! "Requisition Type" is the only required field on this page.



Alert! If you are creating your PO in order to pay your invoice you must attach your invoice to the requisition.

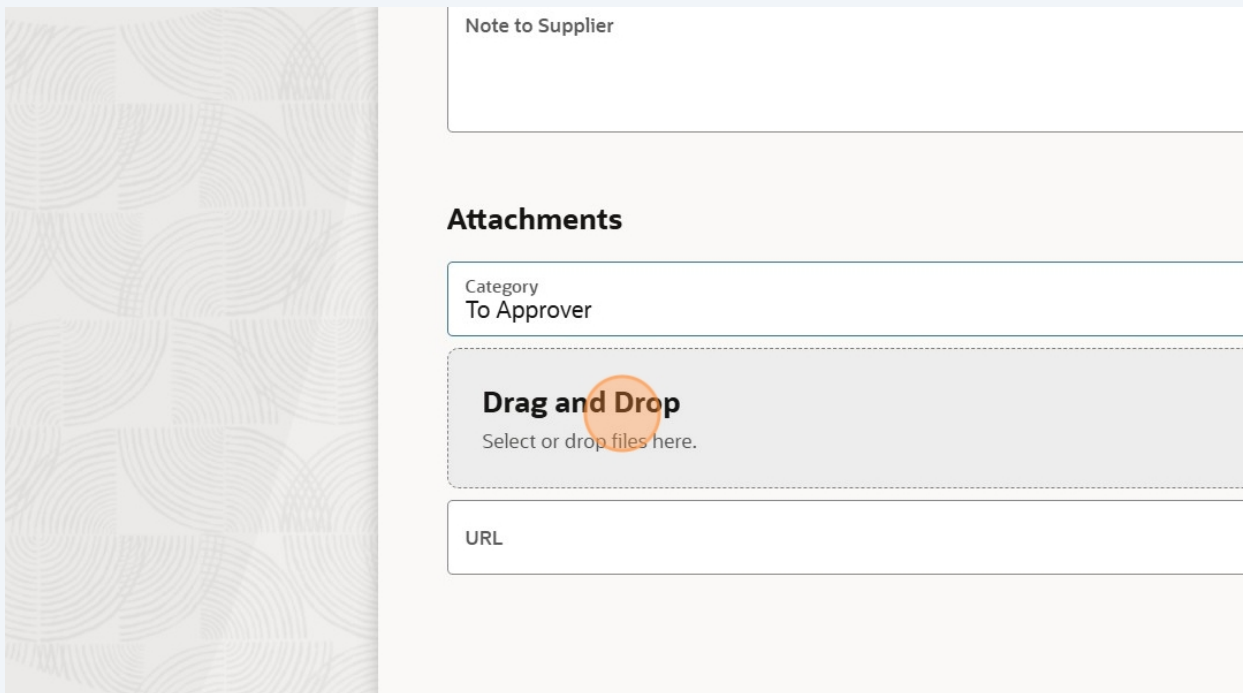


21 Under attachments category, click on "to approver"



The screenshot shows a sidebar with a decorative pattern on the left and a main content area on the right. The main content area has a header section titled "Attachments". Below this header is a form with a "Category" field set to "Internal Attachments". Underneath the category field is a list of options: "Miscellaneous", "Internal Attachments", "To Approver", "To Buyer", "To Receiver", and "To Supplier". The "To Approver" option is highlighted with a light blue background and has an orange circle around it.

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



The screenshot shows a sidebar with a decorative pattern on the left and a main content area on the right. The main content area has a header section titled "Attachments". Below this header is a form with a "Category" field set to "To Approver". Underneath the category field is a dashed box containing the text "Drag and Drop" in bold, with "files" in a smaller font, and "Select or drop files here." below it. An orange circle highlights the "Drag and Drop" text. Below the dashed box is a "URL" field.


**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

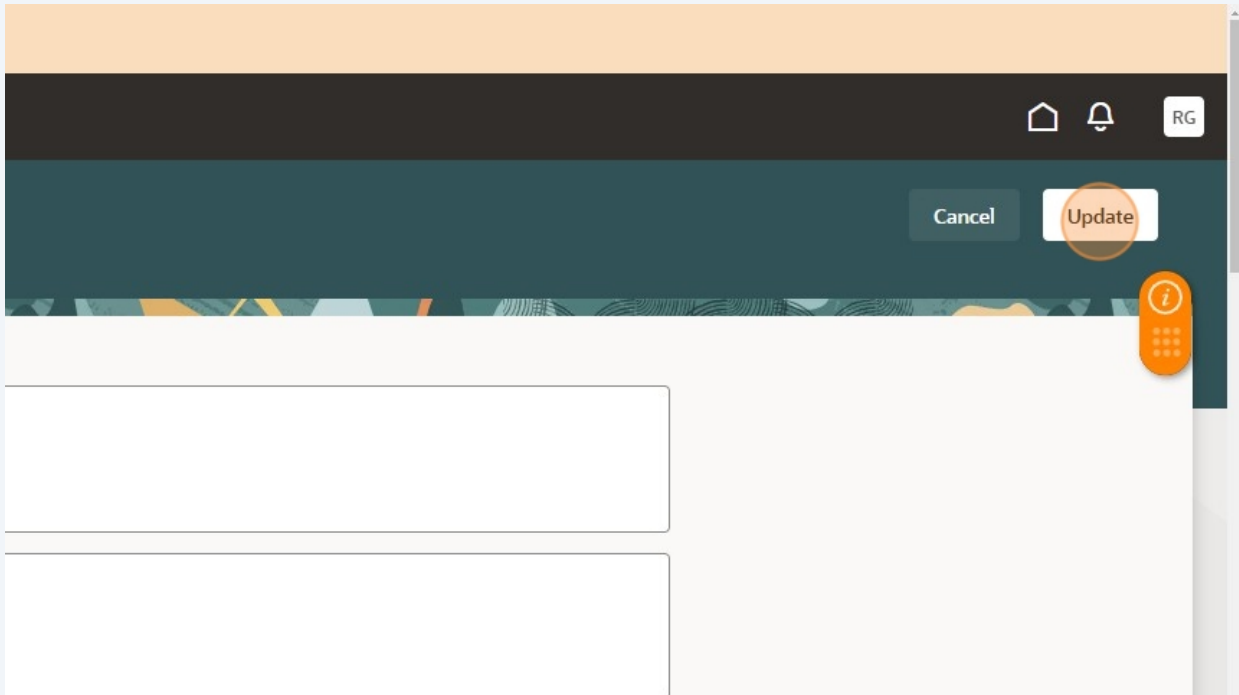
**24** To change the "Requested Delivery Date" click the "Calendar" icon. The requested delivery date defaults to 7 days from the creation date of the transaction, unless revised.


Requested Delivery Date  
11/12/2024

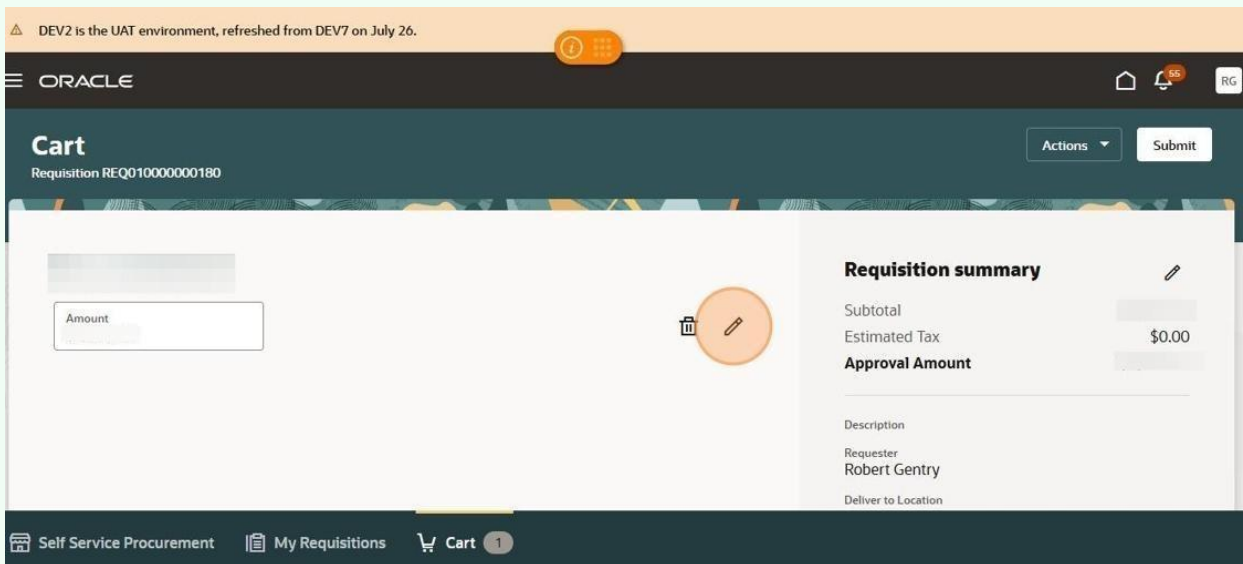


Enter a date on or after 11/5/2024.

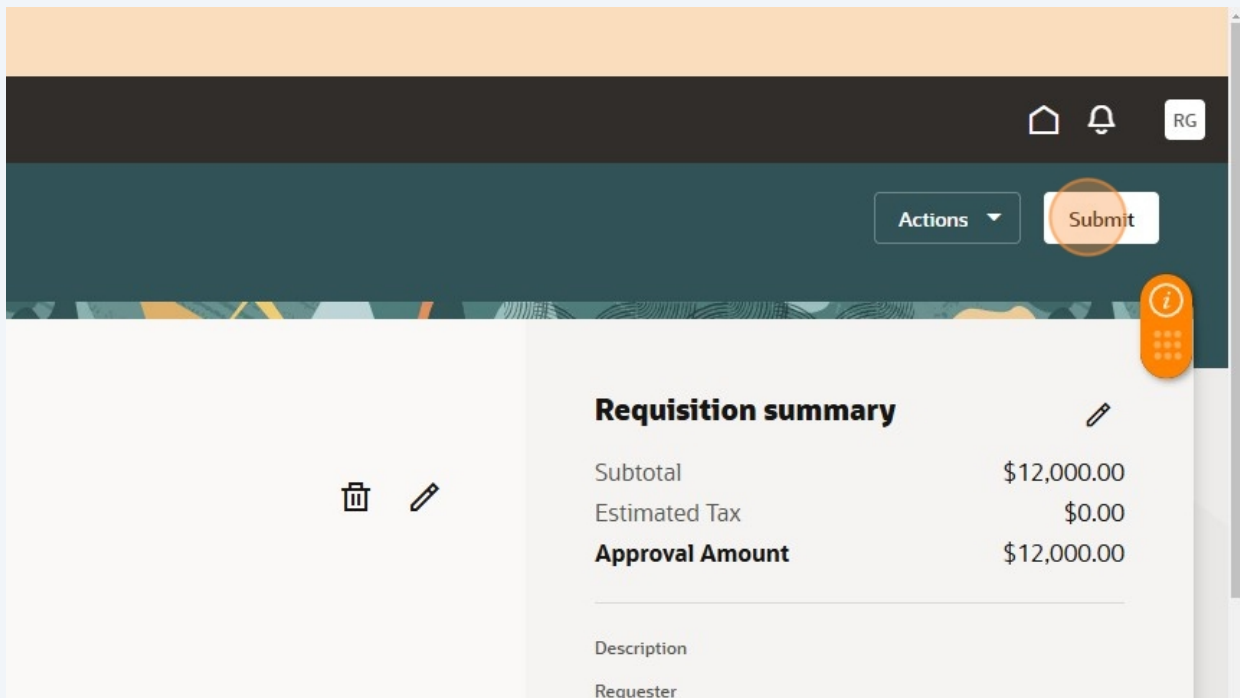
25 Click "Update" to save



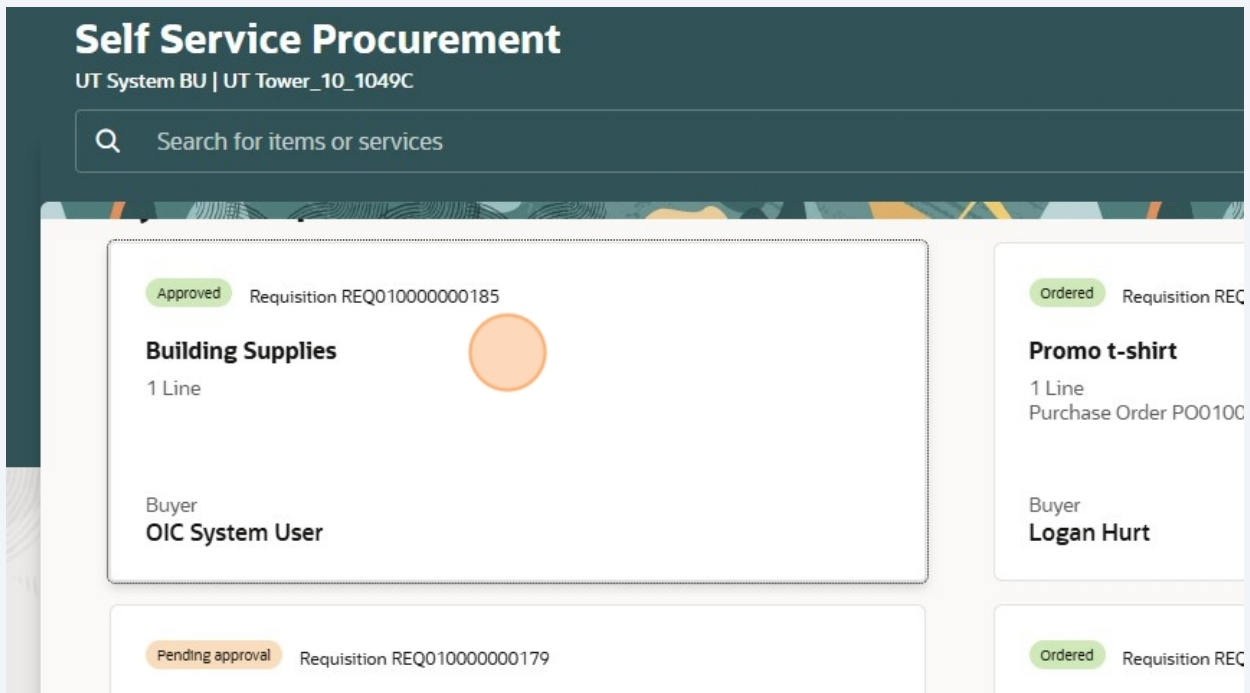
 Tip! To revise the line item, click the "edit/pencil" icon. This is not a required step to complete the transaction. If no change is required (such as splitting the line item into multiple GL codes), skip this step and move to the next.



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.

Entered By Abigail Shellist X Search for requisitions

Submission Date This Year 102 Creation Date Last Quarter 84 Category Miscellaneous 29 Supplier ACME Block and

110 results

REQ01000000201	<b>Supplies</b> Entered By Abigail Shellist
Ordered	<b>Supplies</b> Purchase Order: PO010000000097 sold by ACME Block and Brick INC.
REQ01000000200	<b>Lawn mowing services</b> Entered By Abigail Shellist
Ordered	<b>Lawn mowing services</b> Purchase Order: PO010000000096 sold by Edwards Supply Co
REQ01000000199	<b>Tractor</b> Entered By Abigail Shellist
Approved	<b>Tractor</b>

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

Entered By Abigail Shellist X Search for requisitions

Submission Date This Year 102 Creation Date Last Quarter 84 Category Miscellaneous 29 Supplier ACM

110 results

REQ01000000201	<b>Supplies</b> Entered By Abigail Shellist
Ordered	<b>Supplies</b> <a href="#">Purchase Order: PO010000000097 sold by ACME Block and Brick INC.</a>
REQ01000000200	<b>Lawn mowing services</b> Entered By Abigail Shellist
Ordered	<b>Lawn mowing services</b> Purchase Order: PO010000000096 sold by Edwards Supply Co
REQ01000000199	<b>Tractor</b> Entered By Abigail Shellist
Approved	<b>Tractor</b>

### 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

4

### 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
<b>Related documents</b>			
Requisition REQ01000000201		Source Agreement 9500069095	
<b>Supplier communication</b>			
Supplier Contact HEATHER BROWNE		Communication Method None	
<b>Terms</b>			

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.