

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



When do I use this transaction?

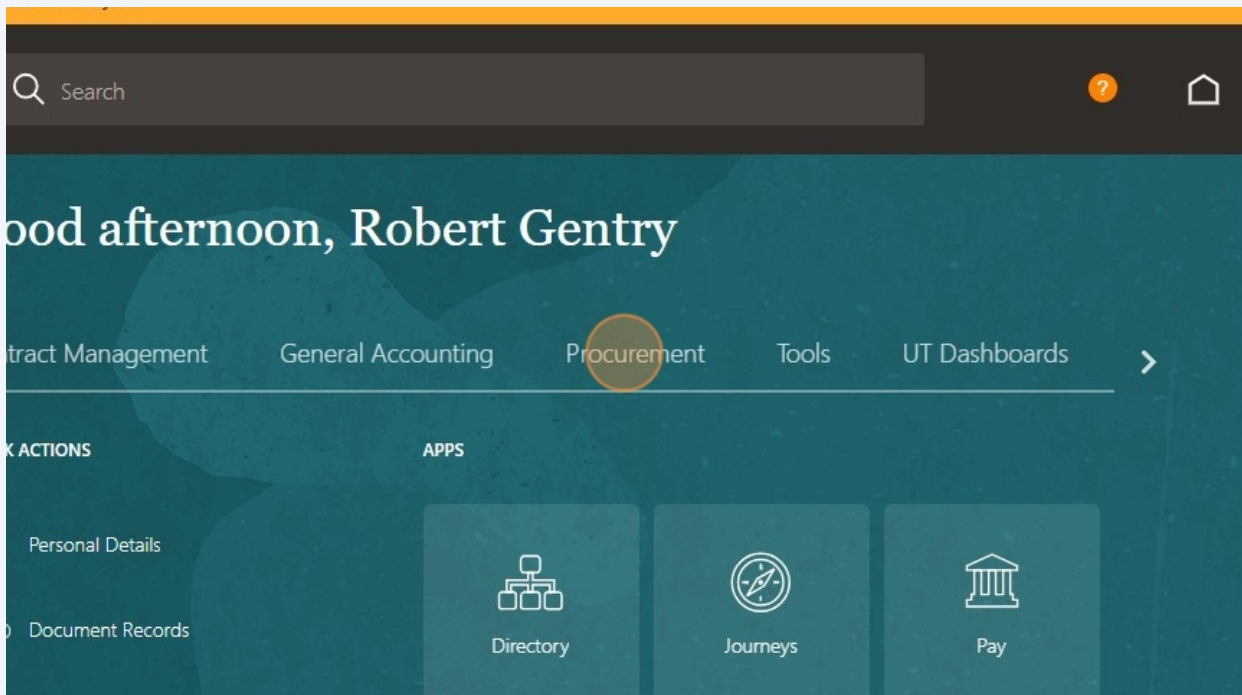
In DASH, you can not pay an invoice against a contract. When a contract is completed in the contract system, a purchase agreement is created. To process a payment against a purchase agreement, a PO must be created. To create a PO, this transaction is used. This transaction will create a PO that is automatically 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.



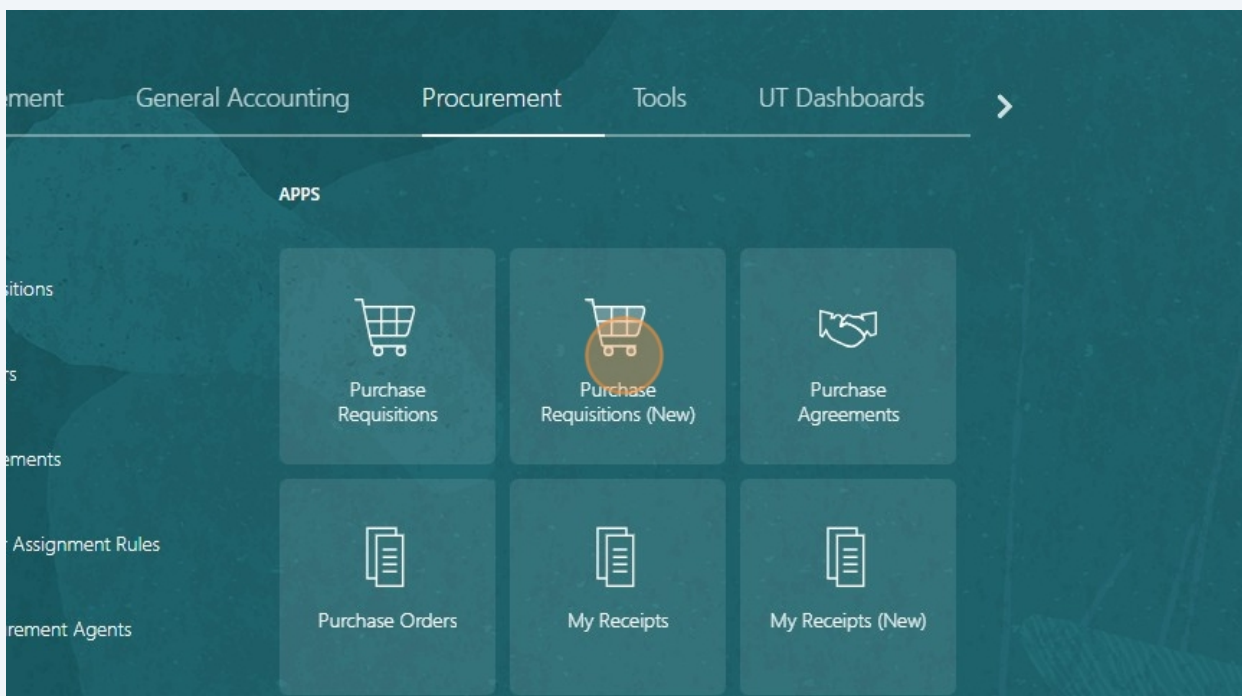
Alert! Accounts Payable will still audit contract purchases but workflow will be a little different. The requisition will route to Accounts Payable before the PO is generated. If you are creating the PO to pay an invoice, please attach your invoice to the requisition.

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.

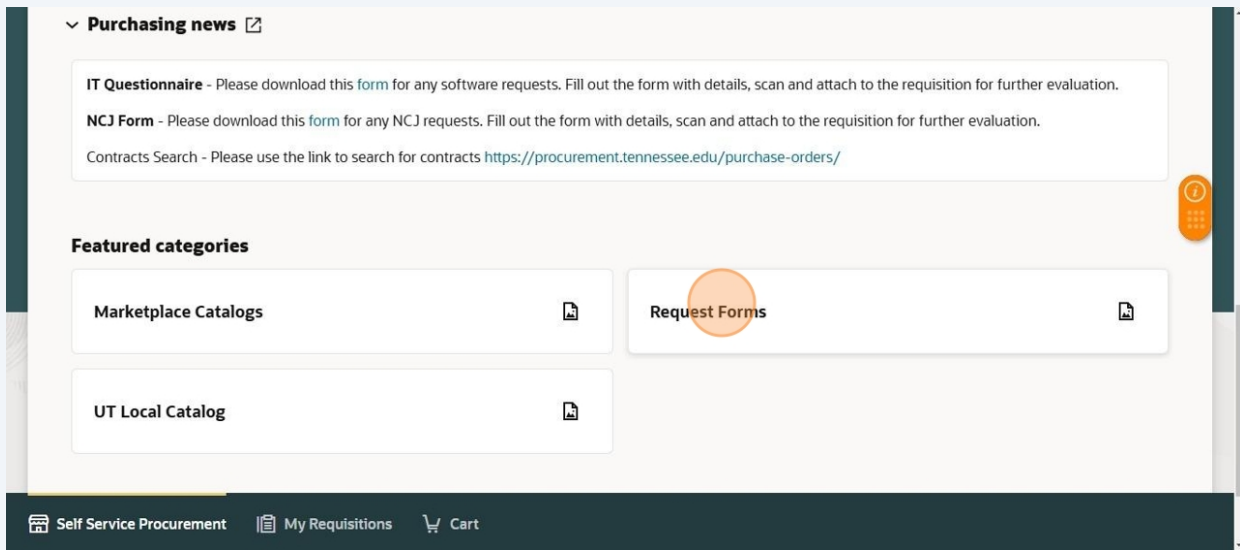
1 Click "Procurement", if you do not see Procurement, click the ">" for more options.



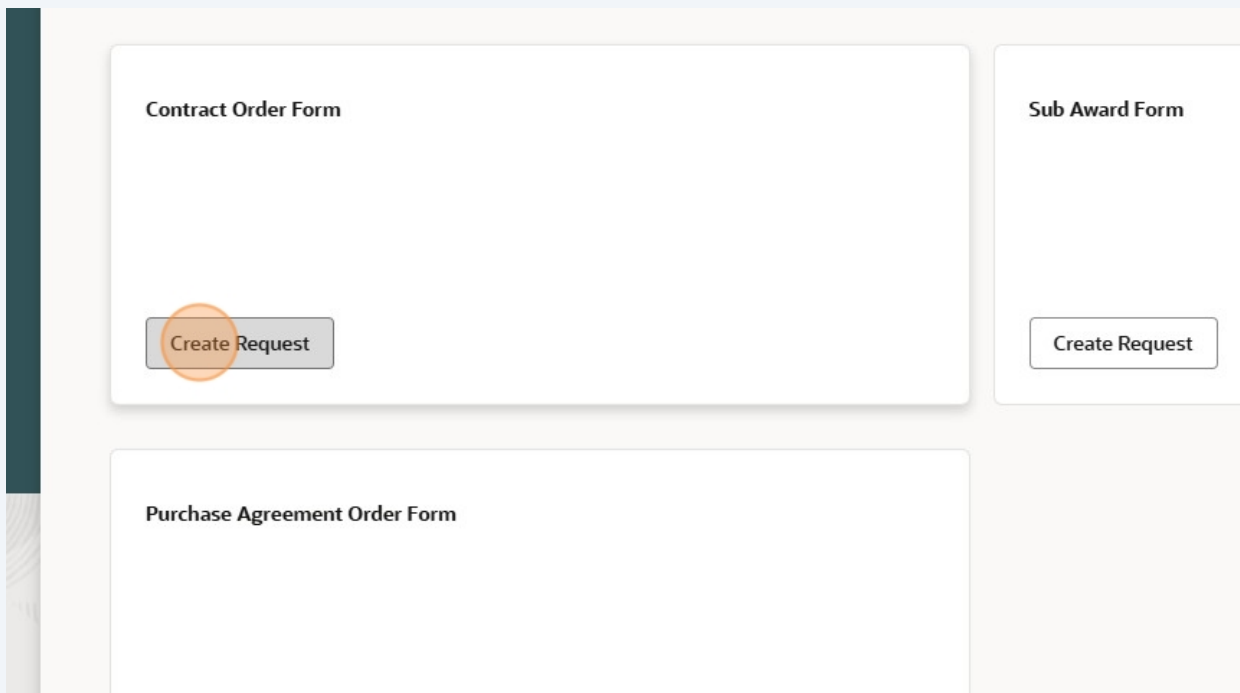
2 Click "Purchase Requisitions (New)"



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 sub-header "Contract Order Form". Below the sub-header is the instruction "Use this form to create a requisition against a '95' contract". The form contains three main input areas: a large text box for "Item Description" with a red circle highlighting the label, a dropdown menu for "Item Type" with "Fixed Price Services" selected, 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 with 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"

The screenshot shows a web form with the following elements:

- A dropdown menu at the top left containing the text "USD".
- A checked checkbox labeled "Negotiated".
- A dropdown menu in the middle containing the text "Agreement", with an orange circle highlighting the dropdown arrow.
- A text input field labeled "Supplier Site".
- A text input field labeled "Supplier Item".
- An orange information icon (a lowercase 'i' in a circle) on the right side of the form.

 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

t

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
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 

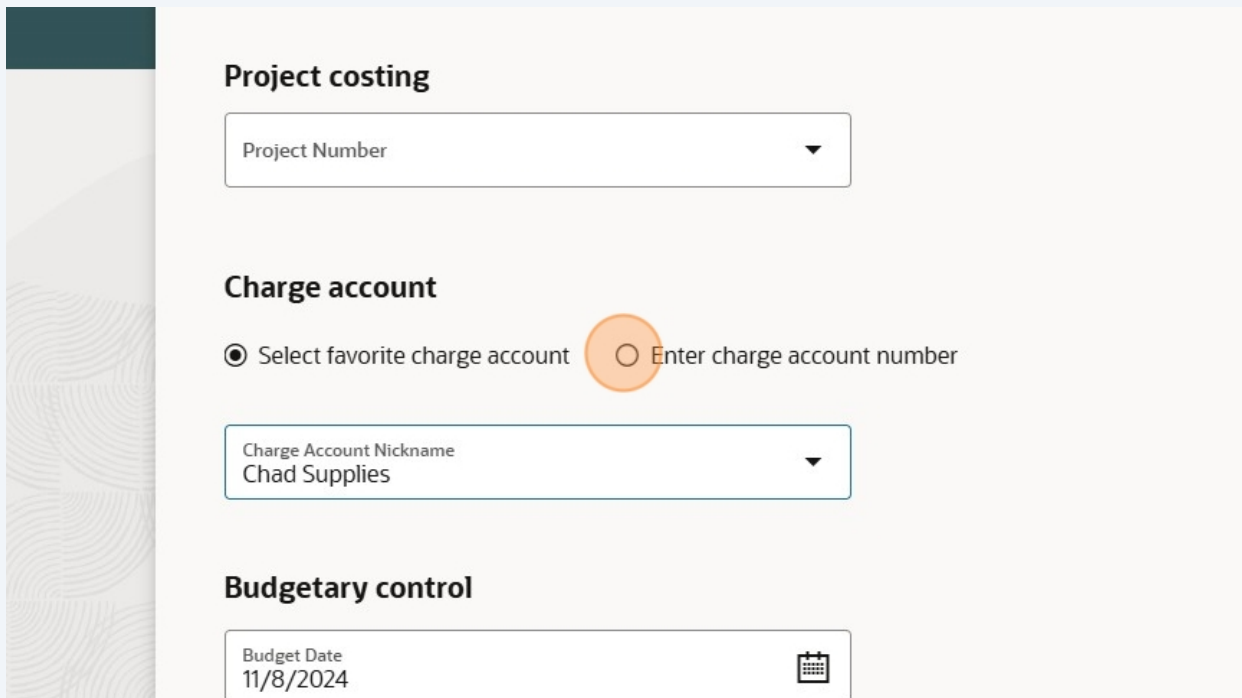
Budget Date
11/8/2024 

Additional information

Requisition Type
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 for "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 for "Charge Account Nickname" with the value "Chad Supplies". The **Budgetary control** section has a date field for "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

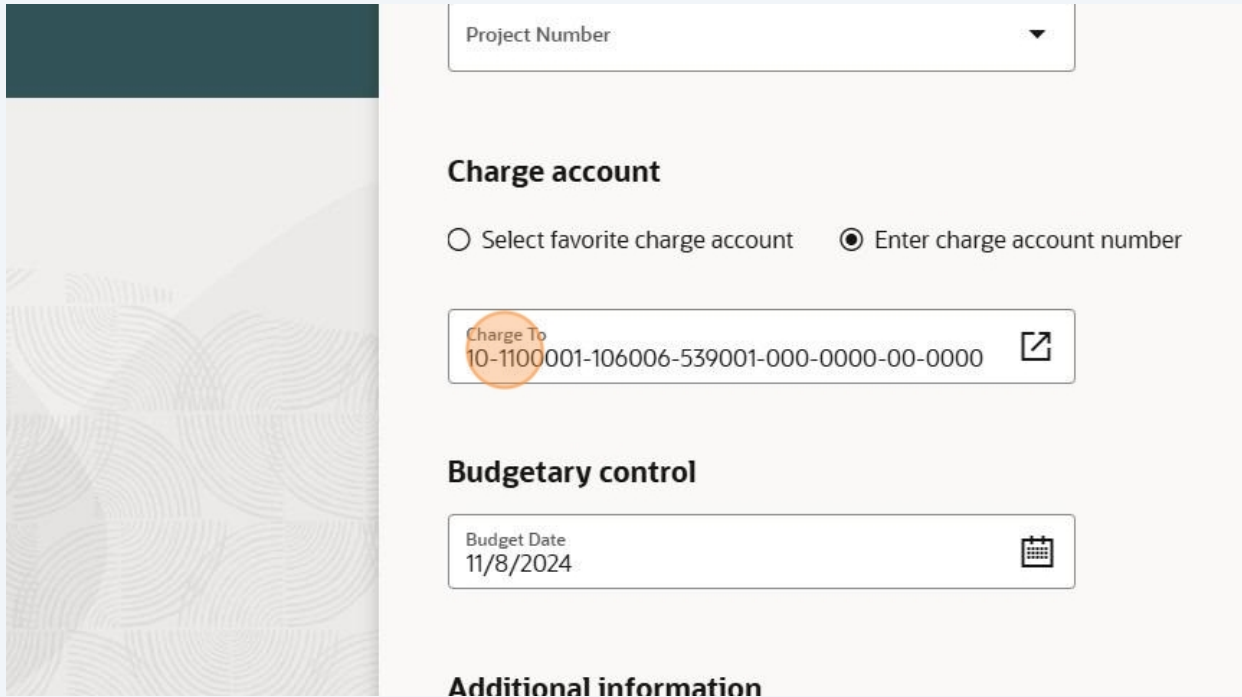
Segment	Value	Descr
Entity	-	-
Fund	-	-
Department	-	-


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




Project Number 

Charge account

Select favorite charge account Enter charge account number

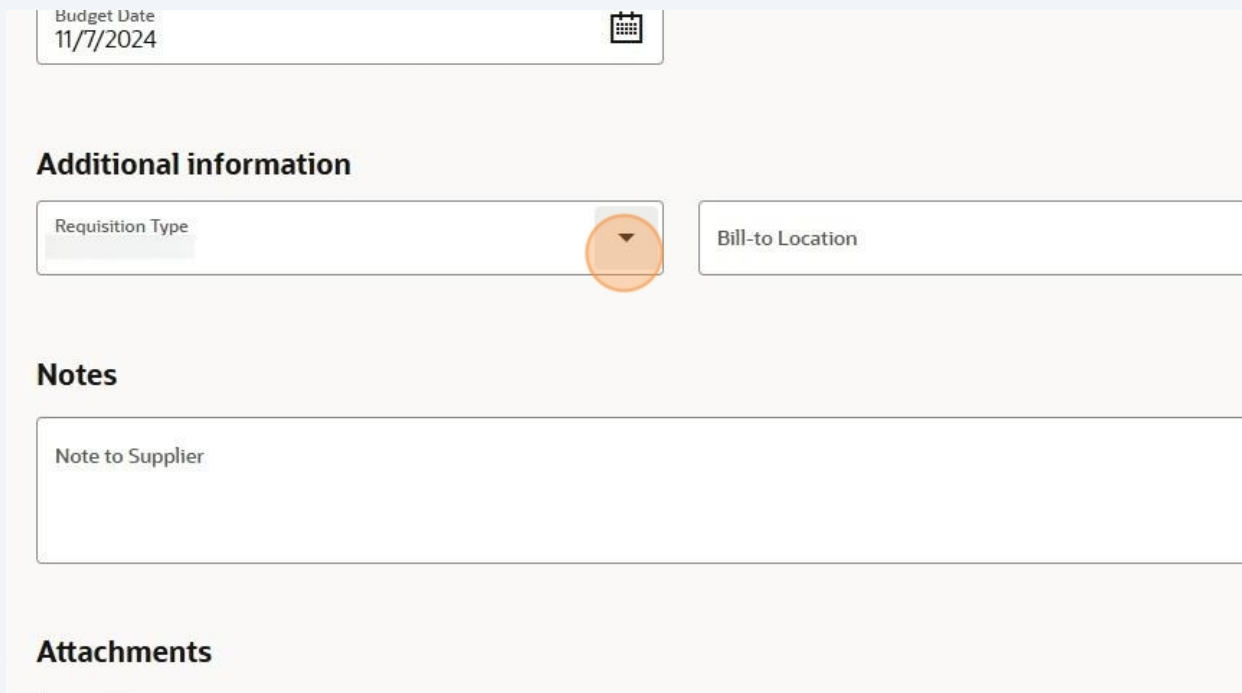
Charge To
10-1100001-106006-539001-000-0000-00-0000 


Budgetary control

Budget Date
11/8/2024 


Additional information

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"

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 dropdown 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.

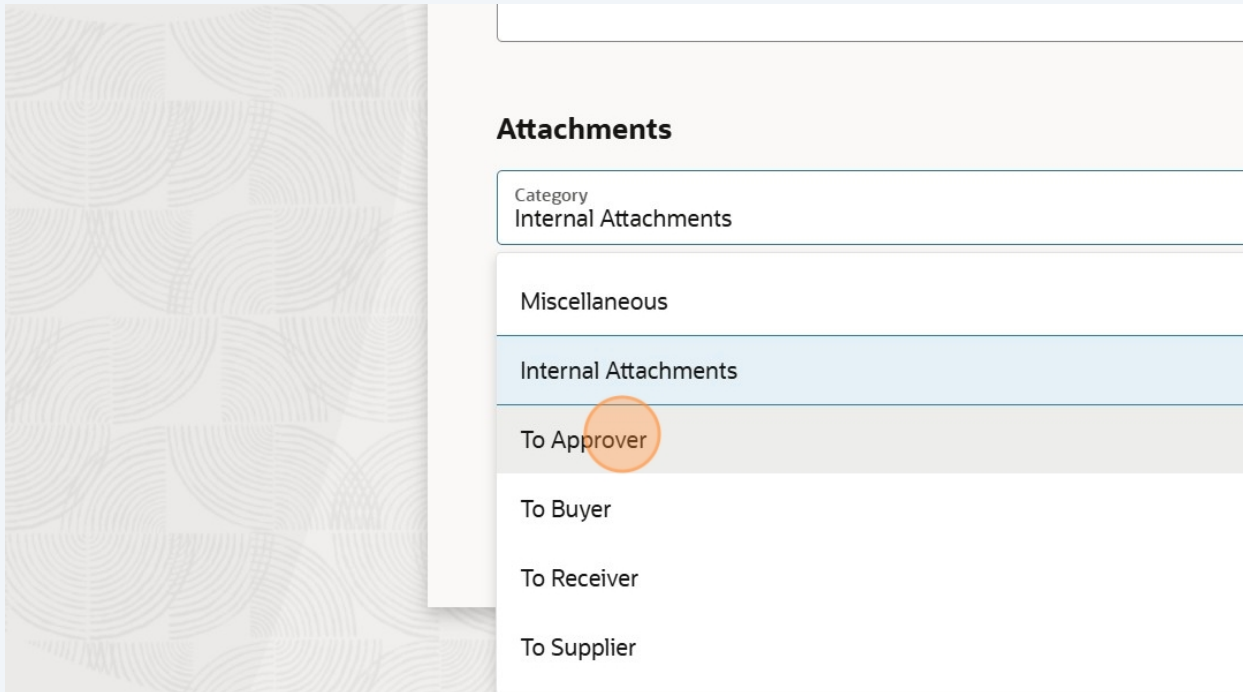


Tip! "Requisition Type" is the only required field on this page.



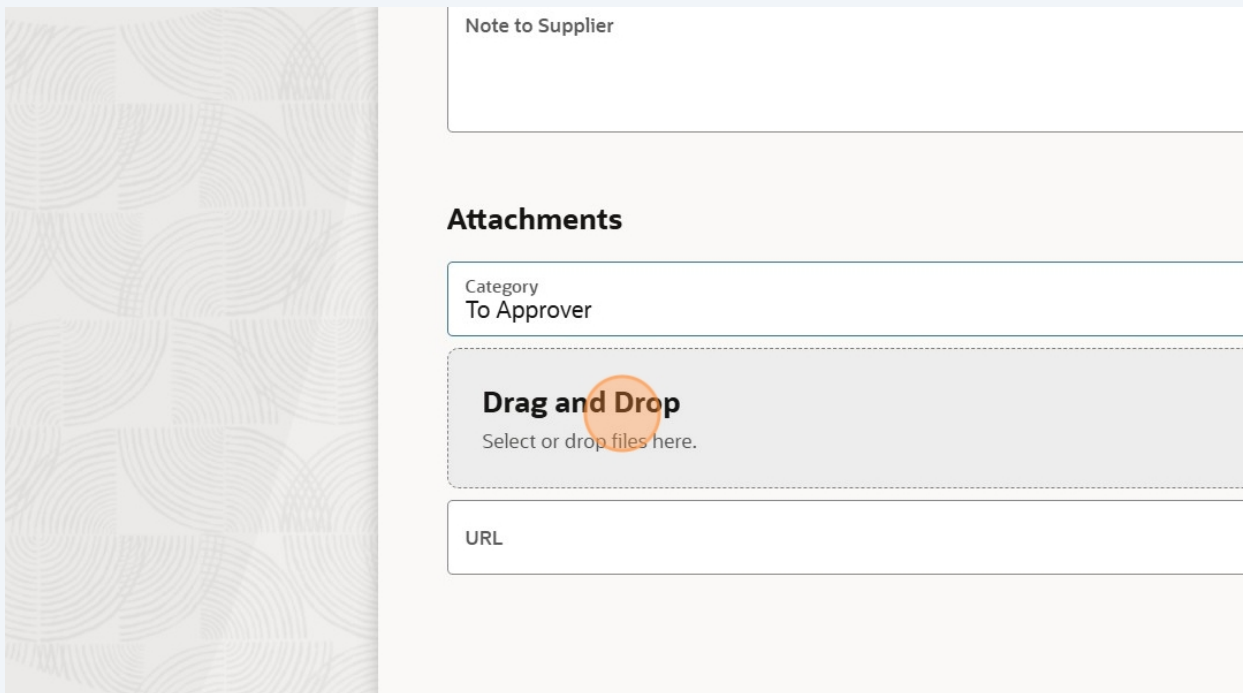
Alert! If you are creating your PO in order to pay your invoice you must attach your invoice to the requisition.

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 "Note to Supplier" field. Underneath the note field is a "Category" field set to "To Approver". Below the category field is a dashed box containing the text "Drag and Drop" and "Select or drop files here.", with an orange circle around the 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

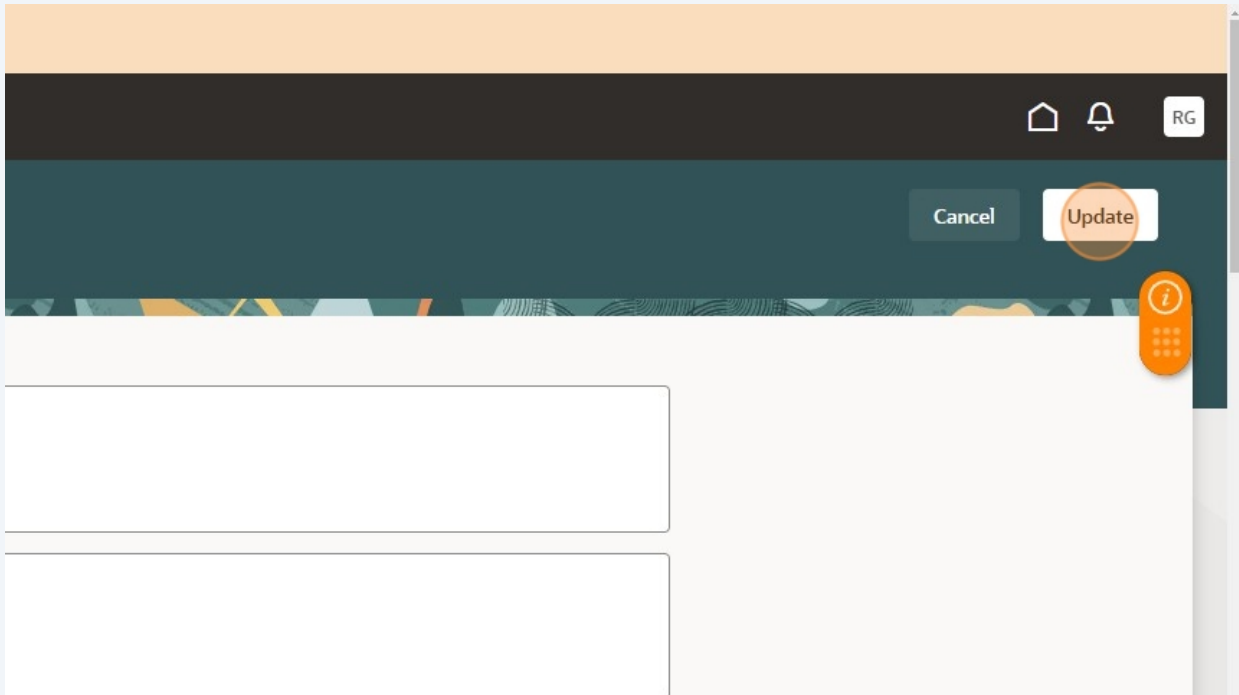
24 To change the "Requested Delivery Date" click the "Calendar" icon. The requested delivery date defaults to 7 days from the creation date of the transaction, unless revised.


Requested Delivery Date
11/12/2024

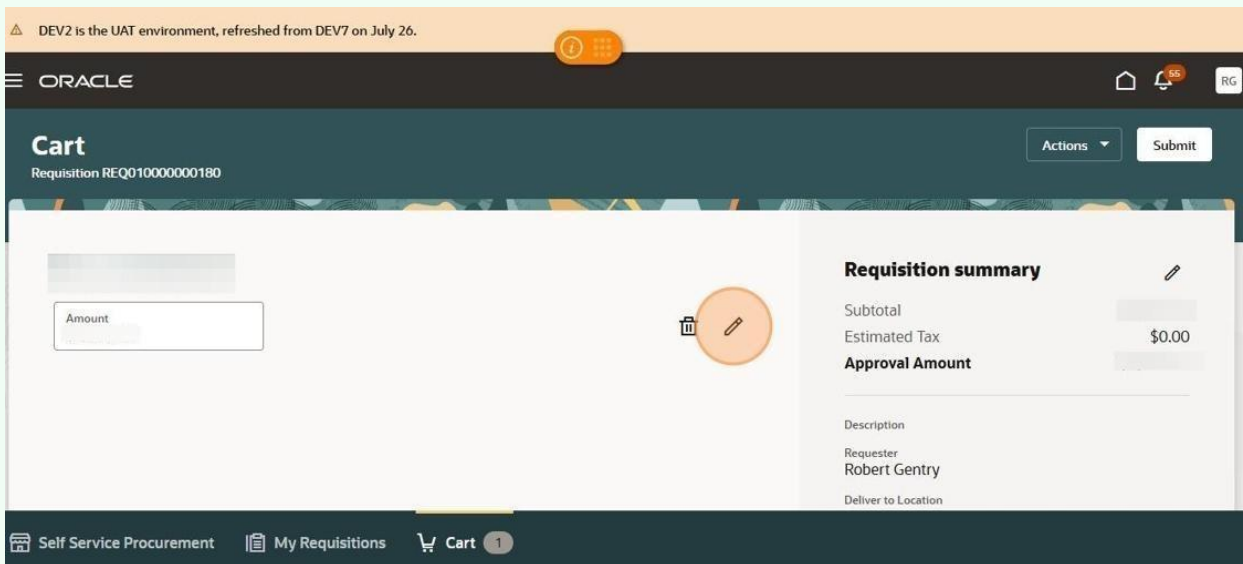


Enter a date on or after 11/5/2024.

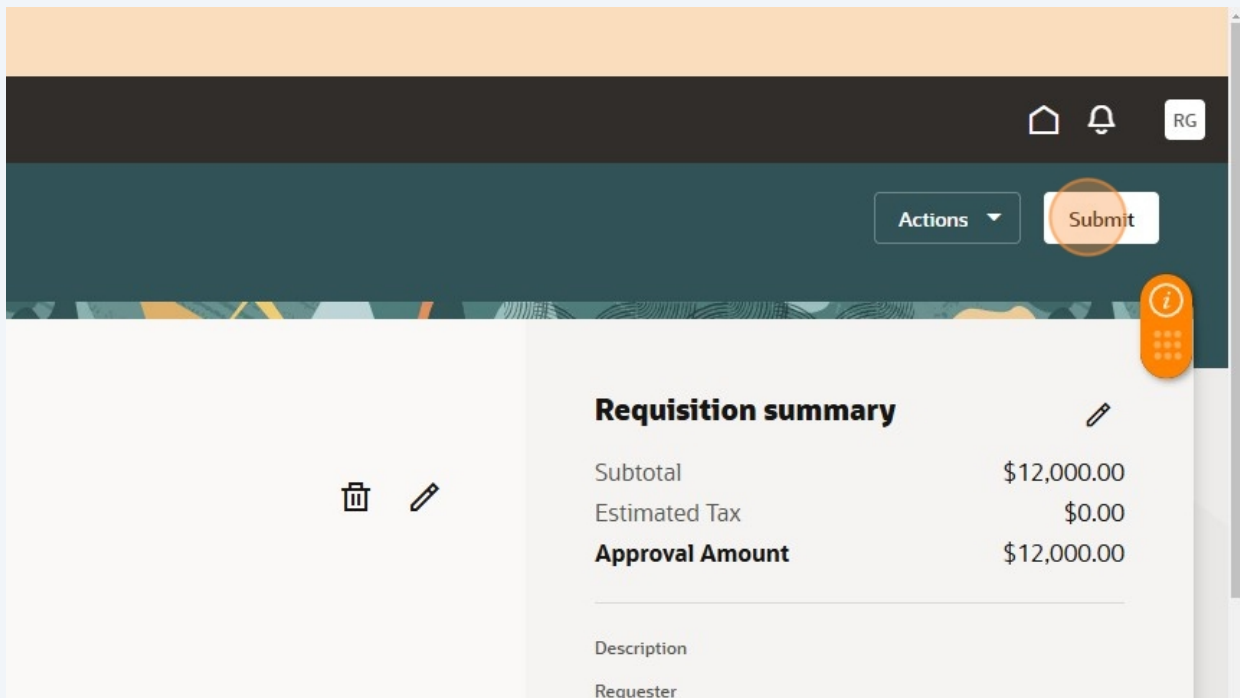
25 Click "Update" to save



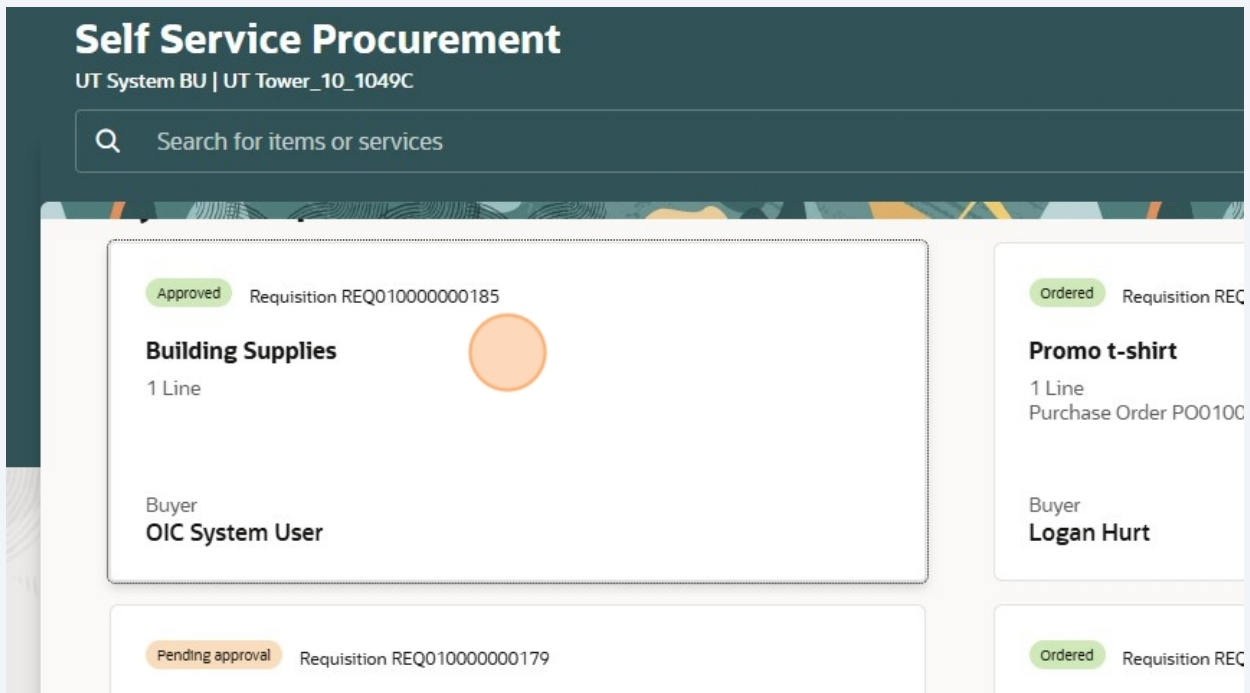
 Tip! To revise the line item, click the "edit/pencil" icon. This is not a required step to complete the transaction. If no change is required (such as splitting the line item into multiple GL codes), skip this step and move to the next.



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

REQ010000000201	Supplies Entered By Abigail Shellist
Ordered	Supplies Purchase Order: PO010000000097 sold by ACME Block and Brick INC.
REQ010000000200	Lawn mowing services Entered By Abigail Shellist
Ordered	Lawn mowing services Purchase Order: PO010000000096 sold by Edwards Supply Co
REQ010000000199	Tractor Entered By Abigail Shellist
Approved	Tractor

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

REQ010000000201	Supplies Entered By Abigail Shellist
Ordered	Supplies Purchase Order: PO010000000097 sold by ACME Block and Brick INC.
REQ010000000200	Lawn mowing services Entered By Abigail Shellist
Ordered	Lawn mowing services Purchase Order: PO010000000096 sold by Edwards Supply Co
REQ010000000199	Tractor Entered By Abigail Shellist
Approved	Tractor

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
Related documents			
Requisition REQ01000000201		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.