



Budget Check a Purchase Order from the PO Page

Budget check is now available on the PO Header. Users can go to the PO header and click the icon to budget check the purchase order. This feature will only be available to individual Purchase order's. Agencies **will not** have access to Budget check a batch of PO's.

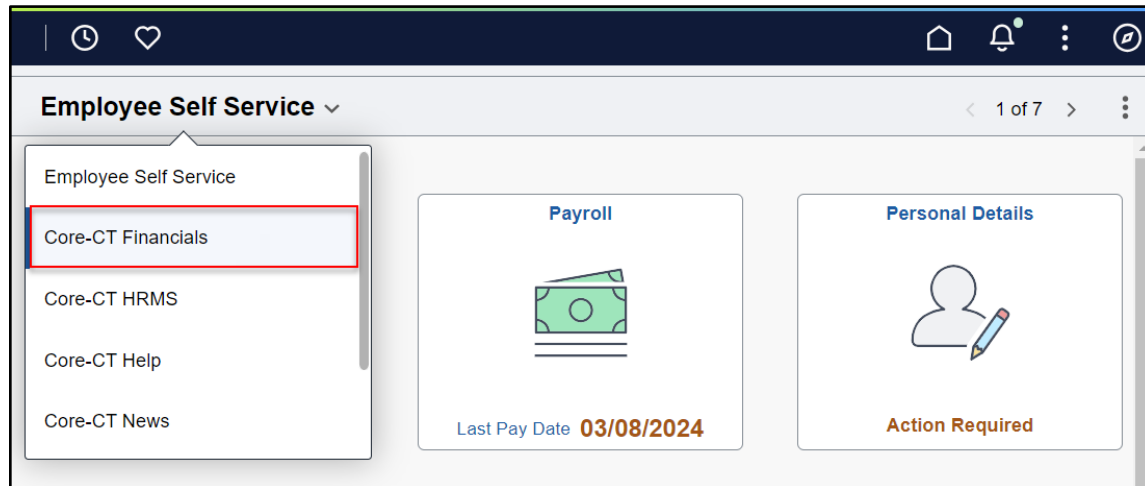
Navigation:

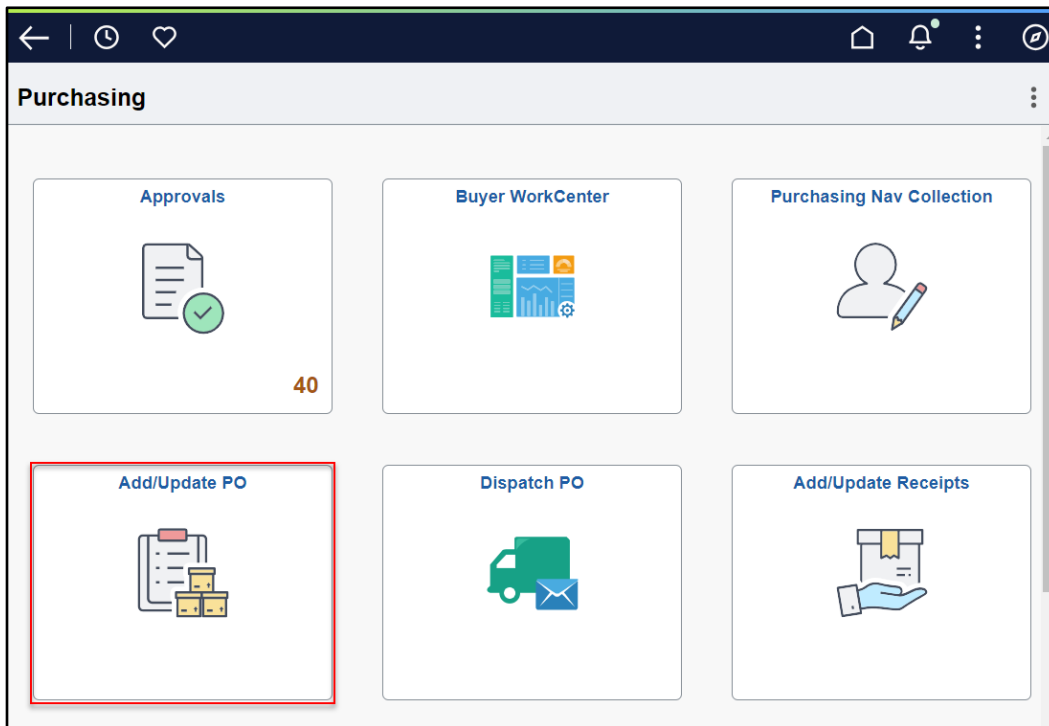
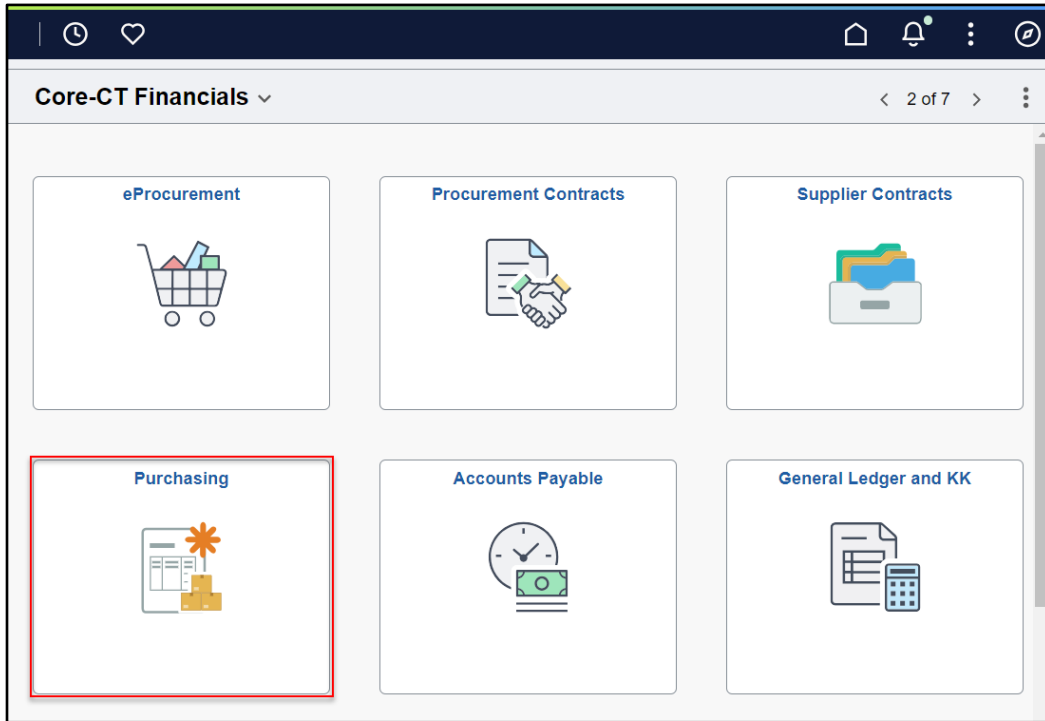


Nav Bar > Menu > Core-CT Financials > Purchasing > Add/Update PO

Or

- Select **Core- CT Financials**
- Click the **Purchasing** tile
- Click **Add/Update PO** tile





1. Click **Find an Existing Value**.



← | 🕒 | ❤️

Purchase Order

Add a New Value 🔍 Find an Existing Value

*Business Unit 🔍

*PO ID

2. Enter **Business Unit**.
3. Click **Search**

← | 🕒 | ❤️

Purchase Order

Find an Existing Value ⊕ Add a New Value

📄 Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches 📌 Saved Searches

*Business Unit 🔍

PO ID

Purchase Order Date

PO Status

Short Supplier Name 🔍

Supplier ID 🔍

Supplier Name 🔍

Buyer 🔍

Buyer Name 🔍

PO Type

Purchase Order Reference

Hold From Further Processing

^ Show fewer options


Case Sensitive



Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Order Reference	Hold From Further Processing	
DASM1	0000022102	10/26/2024	Approved	CROMWEL033-001	0000000033	TOWN OF CROMWELL	DixonMic	DAS-Dixon Michelle R	Construct	Non-Priority Single Applicatio	N	>
DASM1	0000022101	10/11/2024	Dispatched	RESOUR5997-001	0000219695	RESOURCE NAVIGATION LLC	520170	DAS-Davis Denise M	General	(blank)	N	>
DASM1	0000022100	10/11/2024	Dispatched	CARAH59693-001	0000070043	CARAH'SOFT TECHNOLOGY CORPORATION	546750	DAS-Silva-Belica,Lilia A	General	BITS: Support Exp 9/23/27	N	>
DASM1	0000022099	10/10/2024	Dispatched	COVEND2270-001	0000180585	COVENDIS	546750	DAS-Silva-Belica,Lilia A	General	BITS: G Varshney Exp 10/7/25	N	>
DASM1	0000022098	10/10/2024	Dispatched	LENOVO9153-001	0000078968	LENOVO UNITED STATES INC	546750	DAS-Silva-Belica,Lilia A	General	BITS: AV Cart Keyboard Combo	N	>
DASM1	0000022097	10/10/2024	Dispatched	WBMAS05641-001	0000010334	W B MASON COMPANY INC	520170	DAS-Davis Denise M	General	(blank)	N	>
DASM1	0000022096	10/09/2024	Dispatched	ROSNER3751-001	0000102485	ALYSE ROSNER	590442	DAS-Bird,Dawn	Construct	BI-RS-337 DECD/SCSU Art	N	>
DASM1	0000022095	10/09/2024	Dispatched	SHIINT9648-001	0000010136	SHI INTERNATIONAL CORP	546750	DAS-Silva-Belica,Lilia A	General	BITS: ValiMailEnforceExp9/29/25	N	>
DASM1	0000022094	10/07/2024	Dispatched	KERESZ4729-001	0000102476	LISA ROSANNE KERESZI	590442	DAS-Bird,Dawn	Construct	BI-RS-337 DECD SCSU WallStreet	N	>
DASM1	0000022093	10/07/2024	Dispatched	LINDRO4959-001	0000082773	LINDA H LINDROTH	590442	DAS-Bird,Dawn	Construct	BI-RS-337 DECD SCSU (2) Art	N	>

4. This purchase order is Dispatched/Valid therefore the purchase order has already been Budget Checked.

DASM1	0000022101	10/11/2024	Dispatched	RESOUR5997-001	0000219695	RESOURCE NAVIGATION LLC	520170	DAS-Davis Denise M	General	(blank)	N	>
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5. If a purchase order is not valid and displays Approved / Not checked, the Agencies can now budget check directly on the PO header by clicking the **Budget Check** icon .

DASM1	0000022102	10/26/2024	Approved	CROMWEL033-001	0000000033	TOWN OF CROMWELL	DixonMic	DAS-Dixon Michelle R	Construct	Non-Priority Single Applicatio	N	>
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Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1
 PO ID 0000022102
 Copy From [dropdown]

Header

*PO Date 10/26/2024 Supplier Search
 *Supplier CROMWEL033-001 Supplier Details
 *Supplier ID 0000000033 TOWN OF CROMWELL
 *Buyer DixonMic DAS-Dixon Michelle R
 PO Reference Non-Priority Single Applicatio

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Requisitions Document Status
 Actions

PO Status Approved
 Budget Status Not Chk'd
 Hold From Further Processing

Doc Tol Status Valid

Receipt Status Not Recvd
 Priority Medium
 *Dispatch Method Print Dispatch

Amount Summary

Merchandise	50,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	50,000.00	USD
Encumbrance Balance		
Obligation Amount	50,000.00	

Calculate

Add Items From Catalog Item Search

Select Lines To Display Search for Lines Line [input] To [input] Retrieve

Lines

Click on the Budget Check Icon

6. After the PO is successfully budget checked, the PO will display Approved/Valid.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1
 PO ID 0000022102
 Copy From [dropdown]

Header

*PO Date 10/26/2024 Supplier Search
 *Supplier CROMWEL033-001 Supplier Details
 *Supplier ID 0000000033 TOWN OF CROMWELL
 *Buyer DixonMic DAS-Dixon Michelle R
 PO Reference Non-Priority Single Applicatio

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 Requisitions Document Status
 Actions

PO Status Approved
 Budget Status Valid
 Hold From Further Processing

Doc Tol Status Valid

Receipt Status Not Recvd
 Priority Medium
 *Dispatch Method Print Dispatch

Amount Summary

Merchandise	50,000.00	
Freight/Tax/Misc.	0.00	
Total Amount	50,000.00	USD
Encumbrance Balance	50,000.00	USD
Obligation Amount	50,000.00	

Calculate

Add Items From Catalog Item Search

Select Lines To Display Search for Lines Line [input] To [input] Retrieve

Lines



Budget checking Tips...

- The Purchase order is required to be fully approved before you can budget check. If you click on the Budget check, it will run the process, but it will stay as not checked. This PO will not be Budget checked.
- This feature will only be available to individual PO's. Agencies will not have access to Budget check a batch of PO's.
- An important thing to remember is the budget check runs through Batch automatically at 10, 12, 2 and overnight. This new feature is in place in case you need to run the budget check in between these times, but it is not to replace the normal batch. It is also important to not budget check during the normal batch times, but don't worry if you accidentally run it at the same time the system will stop you.
- Purchase Order In Error: If a purchase order does not successfully budget check it will Approved/ERROR. In this case, the buyer is required to find the budget discrepancy, adjust the PO, submit for approval and re budget check the PO.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit: DASM1
PO ID: 000021094
Copy From: [Dropdown]
*PO Date: 10/09/2024
*Supplier: ELECT17567-001
*Supplier ID: 0000145366
*Buyer: [Dropdown]
PO Reference: [Text Field]

Header

Doc Tol Status: Valid
Receipt Status: Not Recvd
Priority: Medium
*Dispatch Method: Email
Dispatch
Calculate

Amount Summary

Merchandise	25.00
Freight/Tax/Misc.	0.00
Total Amount	25.00 USD
Encumbrance Balance	
Obligation Amount	25.00

Add Items From

Catalog Purchasing Kit
Item Search

Select Lines To Display

Search for Lines
Line [Text Field] To [Text Field] Retrieve

Lines

Line	Item	Description	PO Qty	UJOM	Category	Price	Merchandise Amount	Status
1	DS350	DS350	5.0000	EA	32000000	5.00000	25.00	Approved

View Printable Version
View Approvals
*Go to [More...]
Save Return to Search Notify Refresh Add Update/Display