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.
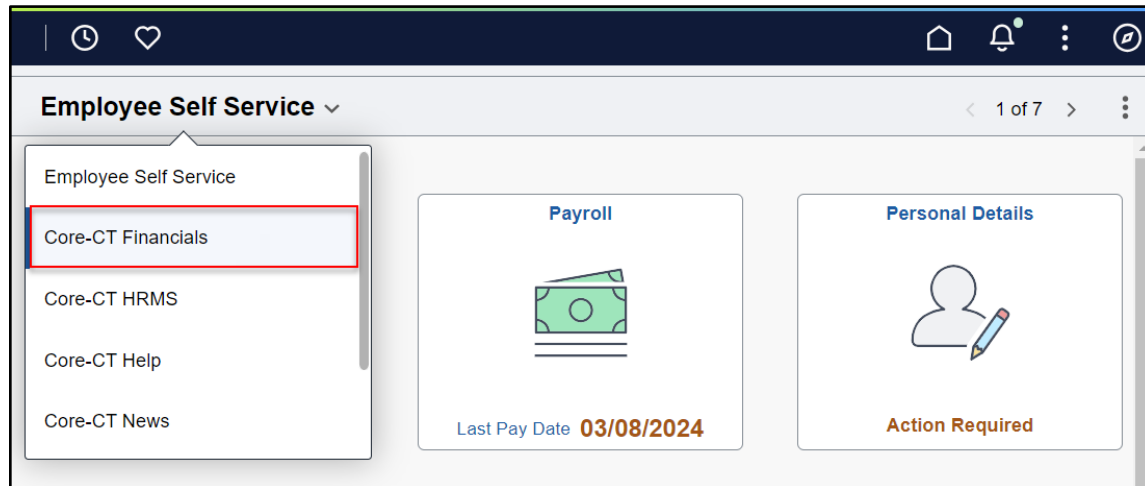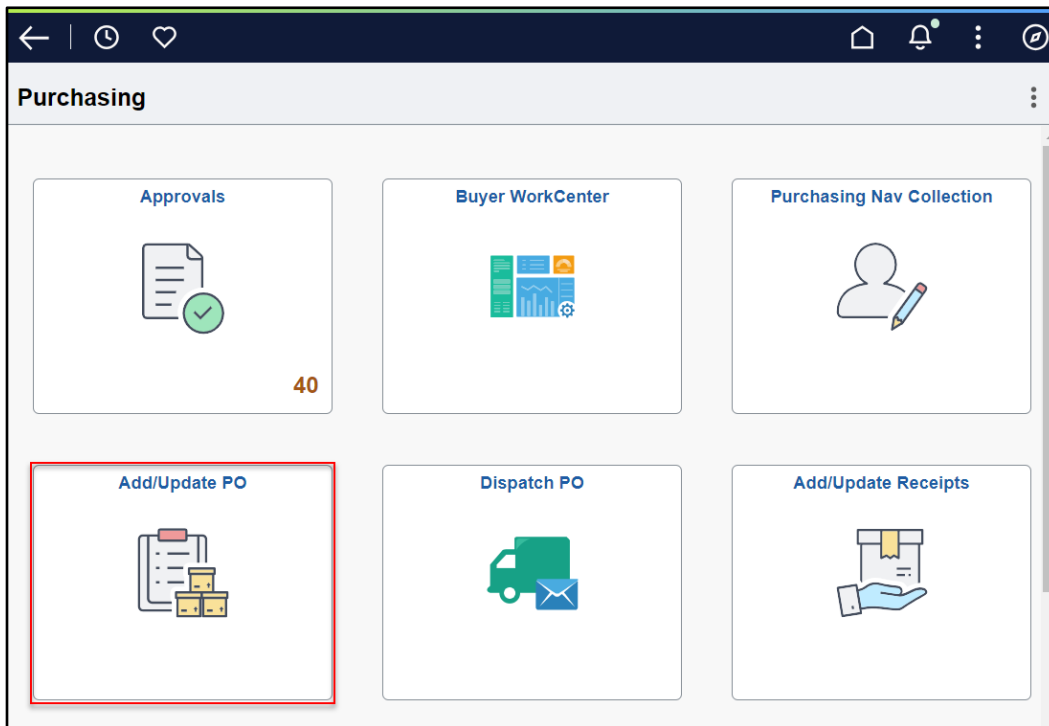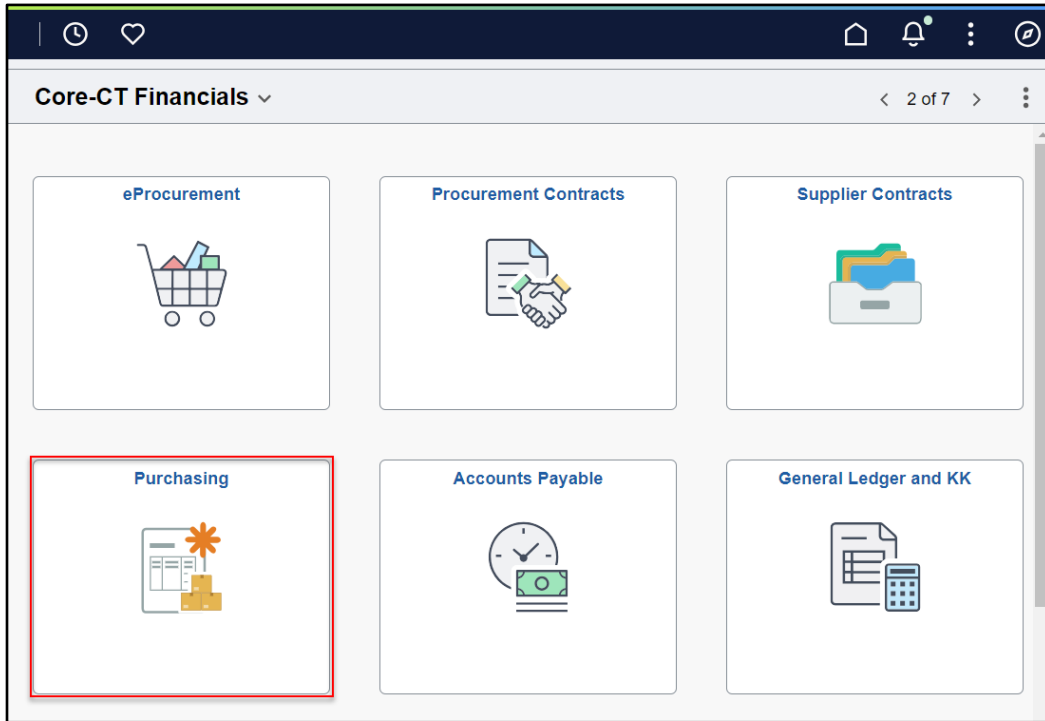
Navigation:

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**.

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

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	CARAHS9693-001	0000070043	CARAHSOFT 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	WBMASO5641-001	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	›

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	›

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

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 <u>not</u> 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 accidently 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.