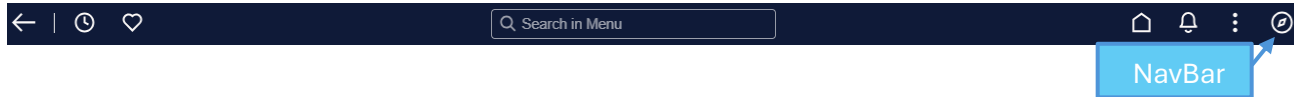




Creating a Purchase Order in Core-CT

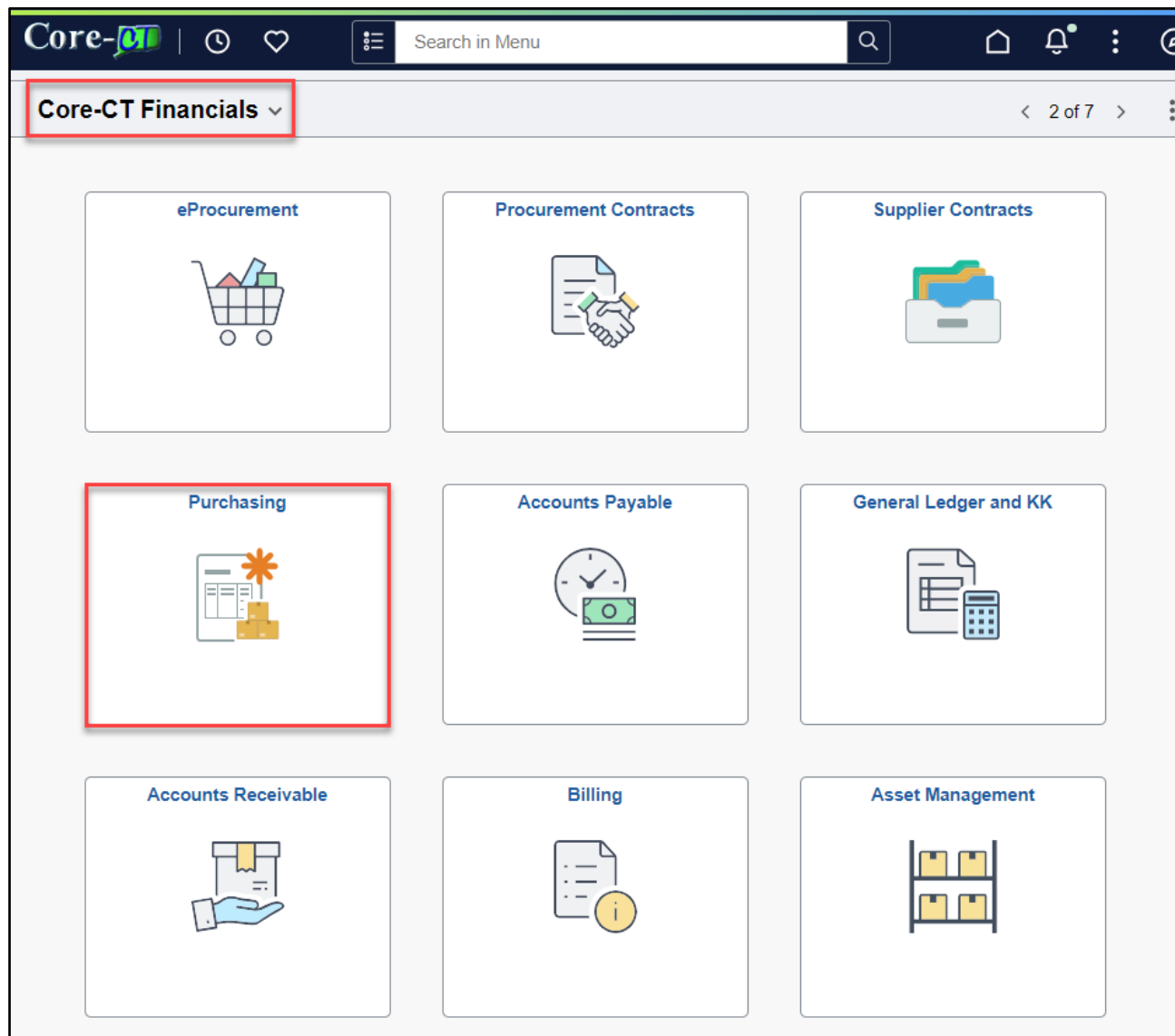
Navigation:

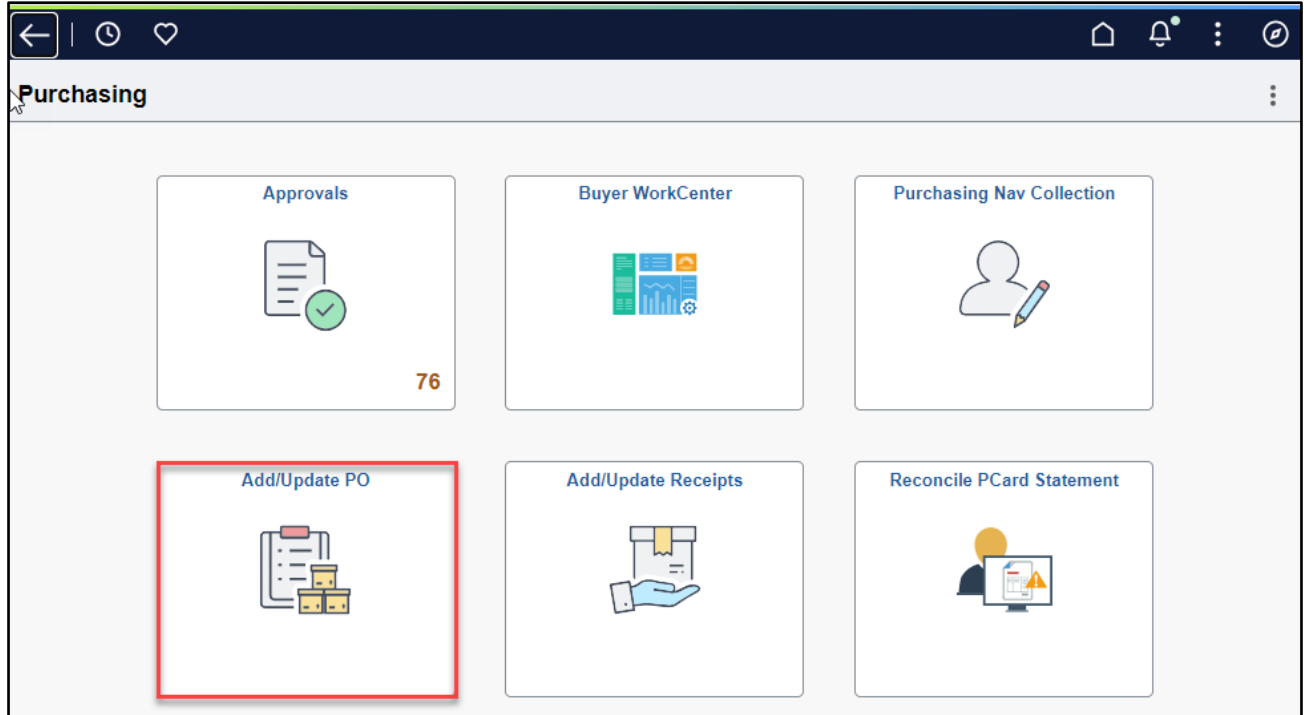
Navbar>Menu>Core-CT Financials > Purchasing> Purchase Orders>Add/Update PO



Or

Core-CT Financials >Purchasing> Add/Update PO





Your Business Unit should default in, and the **PO ID** field should contain the word **Next**

- Click the **Add** Button

Purchase Order

Add a New Value [Find an Existing Value](#)

*Business Unit

*PO ID

If you wish to create a PO by copying from a Contract or another Purchase Order, select the drop-down box at **Copy From**.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit **DASM1**

PO ID **NEXT**

Copy From ▼

Contract

Purchase Order

*PO Date [Supplier Search](#)

*Supplier [Supplier Details](#)

*Supplier ID

*Buyer

PO Reference

[Header Details](#) [Activity Summary](#)

[PO Defaults](#) [Add Comments](#)

[PO Activities](#) [Add ShipTo Comments](#)

▼ Actions

PO Status **Initial**

Budget Status **Not Chk'd**

Hold From Further Processing

Doc Tol Status **Valid**

Receipt Status **Not Recvd**

Priority **Medium** ▼

*Dispatch Method

Amount Summary ⓘ

Merchandise	0.00	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	
Obligation Amount	0.00	

Choose what you wish to copy, you will be taken to the page where you can enter the specific PO number or Contract number you wish to copy.

Copy from Contract

You can search for an existing contract by **Contract ID**, **Supplier**, or **Supplier ID**.

Copy Purchase Order from Contract ✕

[Help](#)

Contract Selection Criteria

Contract SetID **STATE**

Contract ID

Allow Open Item Contract Only

Supplier


Supplier ID

Master Contract

Select Contract

< < 1-1 of 1 > > | [View All](#)

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>						

Use the search icon  to look for existing values. Once you have found the Contract you are looking for, click **on it**.

Look Up Contract ID

[Help](#)

SetID STATE

Contract ID begins with

Basic Lookup

Search Results

Only the first 300 results of a possible 42767 can be displayed.

View 100 1-300 of 300

Contract ID	Supplier Set ID	Supplier ID	Short Supplier Name
WCC MOA 144585389	STATE	UHCM1	UHC-001
UHC-157557333	STATE	UHCM1	UHC-001
TRB2017003	STATE	0000185894	PARTDA5200-001
TEST_CONTRACT_6	STATE	0000000001	ANDOVER001-001
TESTTESTTEST	STATE	0000010009	SUBURB3422-001
TESTK	STATE	0000010008	GRAING0280-001
TESTFY14	STATE	CSUM4	CSU-EAST-001
STORMWISE	STATE	0000020266	CONNEC3531-001
SPG-23-0014	STATE	0000116007	ANCIEN3727-001
SOS2018-306036	STATE	0000156253	INFORM1472-001
SOS2017-25196	STATE	0000156253	INFORM1472-001
SOS2016-24959	STATE	0000156253	INFORM1472-001
SOS12500-2019-2	STATE	0000187444	BERGQU9692-001

Copy Purchase Order from Contract

[Help](#)

Contract Selection Criteria

Contract SetID STATE

Contract ID

Allow Open Item Contract Only

Supplier

Supplier ID

Master Contract

Select Contract

1-1 of 1 | View All

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>						

This will bring the contract information down to the Select Contract section.

- Check the box next to the contract, then click **OK**.

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID: STATE
 Contract ID: TESTK
 Allow Open Item Contract Only

Supplier: _____
 Supplier ID: _____
 Master Contract: _____

[Search]

Select Contract

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input checked="" type="checkbox"/>	STATE	TESTK	TESTBU	0000010008	07/19/2024	07/19/2025

[OK] [Cancel] [Refresh]

The information from the contract you selected has been copied over. Continue and make any changes to the fields as needed.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit: ECDM1
 PO ID: NEXT
 Copy From: _____

PO Status: Open
 Budget Status: Not Ch'd
 Hold From Further Processing

*PO Date: 08/29/2024
 *Supplier: GRAING0280-001
 *Supplier ID: 0000010008
 *Buyer: _____

PO Reference: TESTBU

Doc Tol Status: Valid

Receipt Status: Not Recvd
 Priority: Medium
 *Dispatch Method: Email

Amount Summary

Merchandise	10.00
Freight/Tax/Misc.	0.00
Total Amount	10.00 USD
Obligation Amount	0.00

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		TESTBU	1.0000	EA	44000000	10.00000	10.00	Open

[Save] [Notify] [Refresh] [Add] [Update/Display]

Creating a PO from a POC/N, PSC/N or SCS Contract:

To create a PO from a POC/N, PSC/N or SCS contract, please ensure that the required information has been entered into the contract including line and distribution information, and that all information is correct. Use the Copy From drop down box located at the top of the page. Select Contract, enter the contract number and hit OK. This will copy all Contract information into the PO. Use the Header Details link to correct the PO Type. Add a Buyer for

the PO. Complete the PO Obligation tab. On a PO copied from a contract, do not use the PO Defaults on the PO as it may overwrite the info carried over from the contract.

Copy from Purchase Order

You can search for an existing PO by PO ID, Supplier, Supplier ID, Buyer, etc.

Use the search icon to look for existing values.

X
Look Up PO ID

[Help](#)

Business Unit DASM1

PO Number begins with

Search
Clear
Cancel
Basic Lookup

Search Results

Only the first 300 results of a possible 21044 can be displayed.

View 100

<< < 1-300 of 300 > >>

PO Number	PO Status	Short Supplier Name	Buyer	Purchase Order Reference
0000021082	Approved	WBMASO5641-001	004176	(blank)
0000021081	Approved	WBMASO5641-001	004176	(blank)
0000021080	Approved	WBMASO5641-001	004176	(blank)
0000021079	Approved	WBMASO5641-001	004176	(blank)
0000021078	Approved	SUBURB3422-001	004176	(blank)
0000021077	Approved	SUBURB3422-001	004176	(blank)
0000021076	Approved	SUBURB3422-001	004176	(blank)
0000021075	Approved	SUBURB3422-001	004176	(blank)
0000021074	Approved	TRANSP5924-001	004176	(blank)
0000021073	Approved	TRANSP5924-001	004176	(blank)
0000021072	Approved	WBMASO5641-001	004176	(blank)
0000021071	Approved	WBMASO5641-001	004176	(blank)
0000021070	Approved	ASHFORD003-001	004176	(blank)
0000021069	Approved	ASHFORD003-001	004176	(blank)
0000021068	Approved	ASHFORD003-001	004176	(blank)
0000021067	Approved	ASHFORD003-001	004176	(blank)
0000021066	Approved	SUBURB3422-001	SaczawaBri	(blank)
0000021065	Approved	SUBURB3422-001	SaczawaBri	(blank)
0000021064	Dispatched	SUBURB3422-001	SaczawaBri	(blank)
0000021063	Dispatched	SUBURB3422-001	SaczawaBri	(blank)

Once you have found the purchase order you are looking for, click **Search**. This will bring the purchase order information down to the Select PO section. Check the box next to the PO ID, then click **OK**.

Copy Purchase Order from Purchase Order × Help

PO Selection Criteria

PO ID

Supplier

Supplier ID

Buyer

PO Reference

PO Date

Status

Origin

Item ID

Category

Select PO

<< < 1-1 of 1 > >> | View All

Select	PO ID	PO Date	PO Status	Supplier ID	Supplier
<input checked="" type="checkbox"/>	0000021074	04/17/2024	Approved	0000010419	TRANSP5924-001

Adding a new Purchase Order:

The Supplier **ID** field is the 10-digit PeopleSoft generated ID number for the supplier.

If you do not know the Supplier ID number, the best way to search for the supplier is to utilize the **Supplier Search** link.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit: DASM1
 PO ID: NEXT
 Copy From: [Dropdown]

PO Status: Initial
 Budget Status: Not Chk'd
 Hold From Further Processing

Header

*PO Date: 08/13/2024 [Supplier Search](#)
 *Supplier: [Input] [Supplier Details](#)
 *Supplier ID: [Input]
 *Buyer: [Input]

PO Reference: [Input]

Doc Tot Status: Valid

Receipt Status: Not Recvd
 Priority: Medium
 *Dispatch Method: [Dropdown] [Dispatch](#)

Amount Summary

Merchandise: 0.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 0.00 USD [Calculate](#)
 Obligation Amount: 0.00

Add Items From

Catalog Purchasing Kit
 Item Search

Lines

View Printable Version
 View Approvals

*Go to: [Dropdown]

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

When you click on the link you will be brought to a search page for suppliers.

Supplier Search

[Help](#)

Search Criteria

Name: [Input] Short Name: [Input]
 Alternate Supp Name: [Input]
 City: [Input] State: [Input] [Q](#)
 Country: [Input] [Q](#) Postal: [Input]
 Class: [Input] [Q](#) Type: [Input] [Q](#)
 Max Rows: [Input] 10

[Search](#) [\[Icons\]](#)

Search Results

View All

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>					

Supplier Detail [Address](#)

[OK](#) [Cancel](#) [Refresh](#)

Type in all or part of the supplier's name that you are searching for, and any other information, that may narrow down your supplier search.

- Click **Search**. Results returned will show in the Search Results view.
- Place a checkmark in the box for the Supplier that you wish to choose.
- Click OK

Supplier Search x

Help

Search Criteria

Name Short Name

Alternate Supp Name

City State

Country Postal

Class Type

Max Rows

1 to 10 of 25

Search Results

1-4 of 10
View All

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	0000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	N
<input checked="" type="checkbox"/>	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

Supplier Detail Address

If you are unsure of which address is the ordering address, place a check in the Sel checkbox next to the supplier and click the **Address** link.

Search Results

1-4 of 10
View All

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	0000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	N
<input checked="" type="checkbox"/>	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

Supplier Detail Address

Click **OK** or **CANCEL** to return you to the previous screen.

Address ×
Help

SetID STATE Supplier ID 0000010291

Country USA United States

Address 1 18 COLONIAL RD

Address 2 PO BOX 307

Address 3

City CANTON

County Postal 06019

State CT Connecticut

OK
Cancel
Refresh

To view information about the supplier, place a check in the Sel checkbox next to the supplier and click **Supplier Details**.

Search Results 1-4 of 10 View All

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	0000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	N
<input checked="" type="checkbox"/>	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

Supplier Details
Address

OK
Cancel
Refresh

- Click **OK** or **Cancel** to return you to the previous screen, so you can select the supplier for the Purchase Order. This will bring the supplier data onto the Main Page.

Supplier Detail X

[Help](#)

SetID	STATE	Supplier ID	0000010291	Supplier Status	Approved
Short Supplier Name	SUBURB8829-001	Supplier Classification	Supplier	HR Class	
In City Limit	N	Persistence	Regular	Open For Ordering	Y
Additional Name		Withholding Applicable	N	Display VAT Flag	N
Alternate Supp Name		Address	00001 PO BOX 307		
Corporate Supplier	0000010291		SUBURBAN SANITATION SERVICE INC		
Remit Supplier	0000010291		SUBURBAN SANITATION SERVICE INC		

Supplier Types

🔍
1-1 of 1
View All

Type	Long Name

OK
Cancel
Refresh

If you hover your cursor over the supplier's name, you can view basic information regarding that supplier.

Header ⓘ

*PO Date: 08/13/2024 📅

*Supplier: SUBURB8829-001 🔍

*Supplier ID: 0000010291 🔍

*Buyer: 🔍

PO Reference:

[Header Details](#)
[PO Defaults](#)
[PO Activities](#)
[Actions](#)

Add Items From ⓘ

[Catalog](#)
[Purchasing Kit](#)

Supplier Search


Supplier Details

SUBURBAN SANITATION SERVICE INC

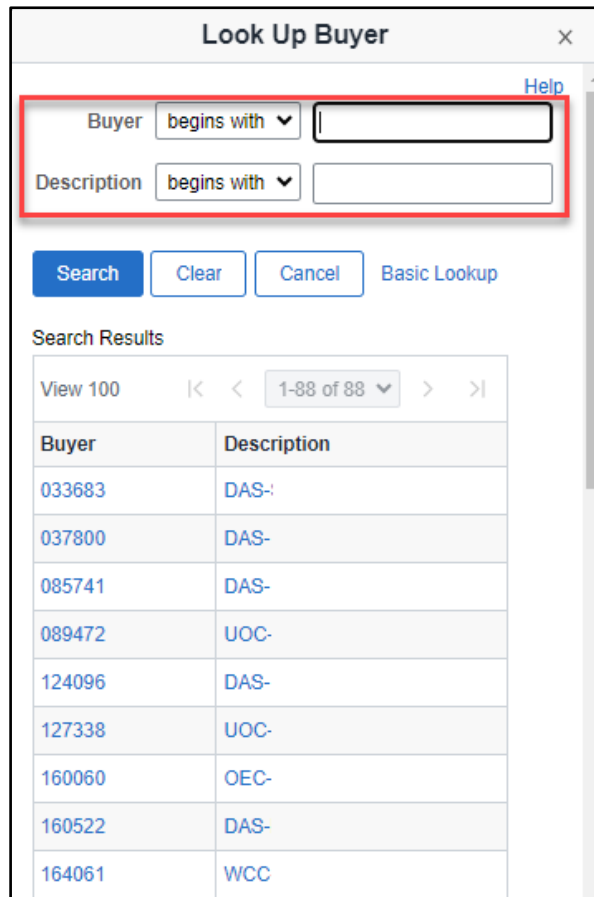
SUBURBAN SANITATION SERVICE INC
 Short Name: SUBURB8829-001
 Phone: 860/673-3078
 Email: doit.core.emailtest@ct.gov
 Location: MAIN
 18 COLONIAL RD
 CANTON, CT 06019
 United States

Contact Name
 Title
 Phone

If the supplier does not exist in the Core-CT system, please contact the supplier and request them to complete the W9 Vendor form, which then gets sent to OSC to be a new supplier entered into Core-CT. Once the new supplier has been uploaded to Core-CT you can proceed with your new purchase order.

Buyer - If the Buyer information does not default in, click on the look up  icon, then Description, change the drop down from begins with to contains and enter all or part of the buyer's last name. Then click [Search](#)

❖ Some Core CT user ids are not the users name but their employee ID number.



Buyer	Description
033683	DAS-
037800	DAS-
085741	DAS-
089472	UOC-
124096	DAS-
127338	UOC-
160060	OEC-
160522	DAS-
164061	WCC

Select the **Buyer** in the Search Results by clicking on the Buyer's name, the Buyer information will be brought into the Purchase Order.

← | 🕒 | ❤️ 🔍 Search in Menu

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1 PO Status Open

PO ID NEXT Budget Status Not Chk'd

Copy From Hold From Further Processing

▼ Header 🕒

*PO Date 08/13/2024 Supplier Search

*Supplier SUBURB8829-001 Supplier Details

*Supplier ID 0000010291 SUBURBAN SANITATION SERVICE INC

*Buyer 085741 DAS-

PO Reference

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

▼ Actions

Doc Tol Status Valid

Receipt Status Not Recvd

Priority Medium

*Dispatch Method Print Dispatch

Amount Summary 🕒

Merchandise	0.00	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	
Obligation Amount	0.00	

Note: If you need to change the buyer on the PO, You will receive the message below. **Do Not Click OK**, this may change values in the distribution line. Instead, **always select Cancel**, the buyer's name will change, but the chartfields will remain the same.

Changing Buyer will change the default values ShipTo ID to 0640000558 Dept ID to DAS23920 Location to ACORE Origin to 106, continue to retrofit the default values? (10200,290)

Changing Buyer will change the default values. Press OK to continue retrofit all new default values to schedules and distributions. Press Cancel to retain the original ShipTo, Department ID, Location and Origin.

PO Reference – Optional field – 30 Character maximum

← | 🕒 | ❤️ 🔍 Search in Menu

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1 PO Status Open

PO ID NEXT Budget Status Not Chk'd

Copy From Hold From Further Processing

▼ Header 🕒

*PO Date 08/13/2024 Supplier Search

*Supplier SUBURB8829-001 Supplier Details

*Supplier ID 0000010291 SUBURBAN SANITATION SERVICE INC

*Buyer 085741 DAS

PO Reference **Contract - Discount**

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

▼ Actions

Doc Tol Status Valid

Receipt Status Not Recvd

Priority Medium

*Dispatch Method Print Dispatch

Amount Summary 🕒

Merchandise	0.00	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	
Obligation Amount	0.00	

TIP: This section will be helpful in the future, when searching for an existing PO, the data put in the PO Reference will populate on the main search page.

Purchase Order

Add a New Value

Enter any criteria to narrow down your search and Click enter. You will see the Purchase order reference, will simplify finding your PO.

Purchase Order

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

Show fewer options

Case Sensitive

Search Results
 70 results Business Unit "ECDM1", Buyer "RichmondM"

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	
ECDM1	0000018297	12/07/2020	Dispatched	CENTRA4594-001	0000010211	CENTRAL MECHANICAL SERVICES INC	RichmondM	OSC-Richmond Michele	General	Newgate heat system repair	N	>
ECDM1	0000018162	10/27/2020	Dispatched	GDONOV0750-001	0000010788	G DONOVAN ASSOCIATES INC	RichmondM	OSC-Richmond Michele	General	Carter House Door Repair	N	>
ECDM1	0000018011	10/05/2020	Dispatched	AQUAPU2138-001	0000013632	AQUA PUMP COMPANY INC	RichmondM	OSC-Richmond Michele	General	Crandall Water Tank replacement	N	>
ECDM1	0000017973	09/11/2020	Dispatched	DELLMA6805-001	0000010075	DELL MARKETING LP	RichmondM	OSC-Richmond Michele	General	(blank)	N	>
ECDM1	0000017888	08/04/2020	Dispatched	CENTRA4594-001	0000010211	CENTRAL MECHANICAL SERVICES INC	RichmondM	OSC-Richmond Michele	General	Electrical A/C units@ Crandall	N	>
						WORLDPAY		OSC-Richmond		Credit card trans		

Not entering anything in this field will just be labeled (blank)

Header Details:

Click on the **Header Details** link.

← | 🕒 | ❤️
🔍 Search in Menu

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

Hold From Further Processing

Doc Tol Status Valid

Receipt Status Not Recvd

Priority Medium

*Dispatch Method Print Dispatch

PO Reference Contract - Discount

Header Details

PO Defaults

PO Activities

Actions

Supplier Search

Supplier Details

SUBURBAN SANITATION SERVICE INC

DAS-

Activity Summary

Add Comments

Add ShipTo Comments

Amount Summary 🕒

Merchandise	0.00
Freight/Tax/Misc.	0.00
Total Amount	0.00 USD
Obligation Amount	0.00

Calculate

Select the PO Type

PO Header Details
✕

PO Details

Help

Supplier SUBURB8829-001

*PO Type GEN

*Billing Location DASM1AD Billing Address

Origin 109 Bus Office

Use One Ship To

PO Date 08/13/2024

Budget Status Not Chk'd

Tax Exempt

ID 066000798DAS

Letter of Credit ID

Ship To 0640000558

Currency

Currency Code USD Exchange Rate Detail

Rate Date 08/13/2024

Rate Type CRRNT

Base Currency USD

Exchange Rate 1.00000000

Process Control Option

Dispatch

*Method Print

Acknowledgements required for Not required

Accounting Date 08/13/2024

Accounting Template STANDARD

▼ **Obligation Amount**

Obligation Amount

Start Date

End Date

OK
Cancel
Refresh

You need to verify the correct **PO Type**. The default is General (GEN). Core-CT has a number of values in this field, and you need to ensure that you select the correct one for your purchase. Either type in the PO type or click the icon.

Look Up PO Type

PO Type: begins with []

Search [] Clear [] Cancel [] Basic Lookup

Search Results

View 100 < < 1-19 of 19 > >

PO Type	Description
BLKT	Blanket PO
BUA	BU Award
CON	Construction
GEN	General
GL	General Letter
GRT	Grant
LOAN	Loan
MA	Master Agreement
MLYR	Multi-year PO
MOU	MOU
POC	POS Competitive
PON	POS Noncompetitive
PSC	PSA Competitive
PSN	PSA Noncompetitive
RL	Rental Lease
ROW	Right Of Way
SCS	Statutory Contractual Services
ST	Standardization Transaction
UFA	Utility/Force Account

BLKT: Blanket PO - This purchase order type could be used for Utility, Heating Oil, Gas or Postage type purchases, in addition to purchases under CT general statutes. If the purchase utilizes a CT General Statute, list the statute number in the line comments for audit purposes.

BUA: Business Unit – This purchase order type is for a contract that an agency establishes based on statutory purchasing authorities or when DAS delegates statutory purchasing authorities. It is restricted to an individual agency.

CON: Construction - This purchase order type should be used in conjunction with construction contracts.

GEN: (Default Value) General – This purchase order type can be used for Business Unit Awards, Statewide Contracts, GSA “General Service Awards” Federal Contracts, and CT General Statutory PO’s. If the purchase utilizes a CT General Statute or a GSA contract, you should, in the line comments, list the statute number or the federal contract number for audit purposes.

GL: General Letter – Used when the CT Purchasing Authority is equivalent to:

GL71a	GL71b	GL71c	GL71d
GL71e	GL71f	GL71g	

GRT: Grant - This purchase order type should be used in conjunction with grant contracts.

LOAN: Loan - This purchase order type should be used in conjunction with loan contracts.

MA: Master Agreement – This purchase order is used for goods or services resulting from an RFP (Request for Proposal).

MLYR: Multi-Year - This PO type can be used for POs that an agency would like to use to cover multiple years, such as copier rentals.

MOU: Memorandum of Understanding - This purchase order type should be used in conjunction with a contract previously known as a Memorandum of Understanding or Memorandum of Agreement.

POC: POS Competitive - This value should be used by the Social Service Agencies for their Purchase of Services contracts *that were competitively bid*. (This replaces POS)

PON: POS Noncompetitive - This value should be used by the Social Service Agencies for their Purchase of Services contracts *that were not competitively bid*. (This replaces POS)

PSC: PSA Competitive - This value should be used by any agency for Personal Service Agreement contracts *that were competitively bid*. (This replaces PSA)

PSN: PSA Noncompetitive - This value should be used by any agency for Personal Service Agreement contracts *that were not competitively bid*. (This replaces PSA)

RL: Rental Lease - This purchase order type should be used in conjunction with Building Leases and Real Property.

ROW: Rights of Way - This purchase order type should be used in conjunction with Right of Way contracts.

SCS: Statutory Contractual Services – This value should be used by DAS, DCS, and DOT only for their statutory contractual services contracts (OPM Statutory Ref 4D-2)

ST: Standardization Transaction – This is to be used when requesting the waiver of the bid or proposal requirement in accordance with CGS 4a-58. **Approval must be obtained by DAS before using this value.**

UFA: Utility Force Account – This is used by DOT only.

Important Note: Agencies that use POC/N, PSC/N and SCS contracts should create one purchase order for a given contract by copying that contract into the PO. OPM requires that that same PO be used for the entire life of the contract.

Go to the bottom of the page to the **PO Obligation** fields. These values will default in, if not manually entered when saving your PO. The start date will be the entered date (today's date), the End Date will be the last day of the Fiscal Year and the Total Obligation Amount will be the total amount of the PO.

▼ **Obligation Amount**

Obligation Amount	<input type="text" value="1,000.00"/>
Start Date	<input type="text" value="07/15/2024"/>
End Date	<input type="text" value="06/30/2025"/>

If this PO is associated with a contract, enter start and end dates that are the same as the terms of the contract.

If you are obligated to this supplier for \$1000.00 and your PO amount is only \$250.00 (ex. first quarter commitment), your Total Obligation Amount of \$1000.00 must be entered.

Note: *Your Total Obligation Amount cannot be lower than the total PO Amount.*

Each time you change the dollar amount of your PO, whether it is a reduction or an increase of the amount, you must change your Total Obligation if your obligation to the supplier is also changing.

PLEASE NOTE: If your Obligation amount is \$1M or higher your PO will be routed to be approved by an OSC Approver. Your PO will be Amount Approved by your agency and then routed to OSC before continuing onto the Agency PO Chartfield Approver.

View Approvals

Business Unit	DASM1	View Printable Version	PO Status	Open	<input checked="" type="checkbox"/>
PO ID	0000021083		PO Date	08/13/2024	
PO Total	0	USD	Budget Status	Not Chk'd	
Supplier ID	0000010291	SUBURBAN SANITATION SERVICE INC	Justification	No justification entered by buyer.	
Buyer	085741	User Name	DAS-Baczewski Michael		
PO Reference	DASM1 0000005025				

[Edit PO](#)

> Review Lines

∨ Review / Edit Approvers

PO AMOUNT APPROVER

Purchase Order 0000021083:Initiated [Start New Path](#)

PO AMOUNT APPROVER

Not Routed

Multiple Approvers

PO Amt Approver Less Than \$10K

OSC Amount Approver

Purchase Order 0000021083:Initiated [Start New Path](#)

OSC Amount Approver

Not Routed

Multiple Approvers

PO Amt Approver More Than \$1M

PO Chartfield Approver

Purchase Order 0000021083:Initiated [Start New Path](#)

PO Chartfield Approver

Not Routed

Multiple Approvers

PO Chart Field Approver

[Return to Purchase Order](#)

When you have completed the Header Details section click [OK](#) and you will be returned to the PO Main Page.

PO Header Details

[Help](#)

PO Details

Supplier: SUBURB8829-001	PO Date: 08/13/2024	
*PO Type: GEN	Budget Status: Not Chk'd	<input checked="" type="checkbox"/> Tax Exempt
*Billing Location: DASM1AD	Billing Address	
Origin: 106	ID: 066000798DAS	Letter of Credit ID:
<input type="checkbox"/> Use One Ship To	Ship To: 0640000558	
Currency		
Currency Code: USD	Exchange Rate Detail:	Base Currency: USD
Rate Date: 01/01/1900		Exchange Rate: 1.00000000
Rate Type: CRRNT		
Process Control Option		
<input checked="" type="checkbox"/> Dispatch	Acknowledgements required for: Not required	
*Method: Print	Accounting Date: 08/13/2024	
	Accounting Template: STANDARD	
Obligation Amount		
Obligation Amount: 1,000,001.00		
Start Date: 07/15/2024		
End Date: 06/30/2025		

PO Defaults:

Click on the [PO Defaults](#) link.

Po Defaults is a great way to save time while creating a multi-line purchase order. The fields that you enter in the Po defaults will automatically default into all of your lines on your purchase order.

← | 🕒 | ❤️
🔍 Search in Menu

Add/Update POs

Maintain Purchase Order

Purchase Order

<p>Business Unit: DASM1</p> <p>PO ID: NEXT</p> <p>Copy From: <input type="text"/></p>	<p>PO Status: Open <input checked="" type="checkbox"/></p> <p>Budget Status: Not Chk'd <input type="checkbox"/></p> <p><input type="checkbox"/> Hold From Further Processing</p>												
<p>Doc Tol Status: Valid</p>													
<p>Header</p> <p>*PO Date: 08/13/2024 <input type="button" value="📅"/> Supplier Search</p> <p>*Supplier: SUBURB8829-001 <input type="button" value="🔍"/> Supplier Details</p> <p>*Supplier ID: 0000010291 <input type="button" value="🔍"/> SUBURBAN SANITATION SERVICE INC</p> <p>*Buyer: 085741 <input type="button" value="🔍"/> DAS</p> <p>PO Reference: DASM1 0000005025</p>													
<p>Header Details</p> <p>PO Defaults</p> <p>PO Activities</p> <p>▼ Actions</p>	<p>Activity Summary</p> <p>Add Comments</p> <p>Add ShipTo Comments</p>												
<p>Amount Summary</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td>Merchandise</td> <td style="text-align: right;">1,430.50</td> <td></td> </tr> <tr> <td>Freight/Tax/Misc.</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td>Total Amount</td> <td style="text-align: right;">1,430.50</td> <td>USD</td> </tr> <tr> <td>Obligation Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> </table>		Merchandise	1,430.50		Freight/Tax/Misc.	0.00		Total Amount	1,430.50	USD	Obligation Amount	0.00	
Merchandise	1,430.50												
Freight/Tax/Misc.	0.00												
Total Amount	1,430.50	USD											
Obligation Amount	0.00												

The Default option should be always be Override. Do not ever select Default.

Do Not Enter PO Defaults if your PO was copied from a POC/N, PSC/N or SCS contract. The defaults will copy over from the contract distribution line.

-You can enter in a default **Category** and **Unit of Measure** under the Line heading.

-Enter your default **Ship To, Due Date**, and Distributions for this PO.

-If this is an amount only Purchase order, you can click the arrow in the **Distribute By:** field and choose Amount

Note: You will have the option to change any of this information at the line detail, if necessary.

X
Help

Purchase Order Defaults

Business Unit DASM1
PO ID NEXT
Supplier SUBURB8829-001

Default Options ⊙

○ Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

● Override If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category
Unit of Measure

Schedule

Ship To DAS 450 Columbus Blvd Hartford
Ultimate Use Code

Due Date
Original Promise Date

Ship Via COMMON
Freight Terms Code

Arbitration
Freight Charge Method

*Distribute By

Quantity
Amount
Quantity

Distribution

SpeedChart

Distributions

Chartfields Asset Information

Dist	Percent	GL Unit	Fund	Dept	SID	Program	Account	Bud Ref
1	100.0000	STATE	11000	DAS23920	10050	00000	53335	

OK Cancel Refresh

If you add PO Defaults **after** PO Lines are created, you will receive the following message: Make the necessary selections for this PO.

If you wish to apply the coding to all distribution lines, you will need to check the box on the left under “Apply” and if applicable on the right to “Apply to All Distribution Lines”.

Note: Some Retrofits will be greater/less than others by business unit and Supplier. To see all lines, click [View All](#) , then select which lines you want to update.

PO Default Retrofit x

[Help](#)

Maintain Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....

Business Unit DASM1 PO ID NEXT Supplier SUBURB8829-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
 For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
 Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
 Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Retrofit Field Selection

🔍 1-4 of 4 View All

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input type="checkbox"/>		Ship To	0640000558	
<input type="checkbox"/>		Ship Via	COMMON	
<input type="checkbox"/>		Freight Terms Code	FOB DEST	
<input type="checkbox"/>	1	Bud Ref	2024	<input checked="" type="checkbox"/>

Select All Clear All

OK
Cancel
Refresh

Click OK when done.

Entering Header Comments:

Select the [Add Comments](#) Link if you wish to enter Header Comments for this PO. Header comments are normally comments that apply to the entire PO.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1 PO Status Open
 PO ID NEXT Budget Status Not Chk'd
 Copy From Hold From Further Processing

▼ Header ⓘ

*PO Date 08/13/2024 Supplier Search Doc Tol Status Valid
 *Supplier SUBURB8829-001 Supplier Details Receipt Status Not Recvd
 *Supplier ID 0000010291 SUBURBAN SANITATION SERVICE INC Priority Medium ▼
 *Buyer 085741 DAS-Baczewski Michael *Dispatch Method Print ▼

PO Reference DASM1 0000005025

Header Details Activity Summary
 PO Defaults **Add Comments**
 PO Activities Add ShipTo Comments
 ▼ Actions

Amount Summary ⓘ

Merchandise	1,430.50	<input type="button" value="Calculate"/>
Freight/Tax/Misc.	0.00	
Total Amount	1,430.50 USD	
Obligation Amount	0.00	

Add your comments and Select the appropriate action, such as **Send to Supplier**, **Show at Receipt**, **Show at Voucher**, or **Approval Justification**.

If you are not attaching a document then, click when you are done.

PO Header Comments

Business Unit DASM1 PO ID NEXT Supplier SUBURB8829-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments 1 of 1 View All

Use Standard Comments Comment Status Active Inactivate +

Please deliver order to 3rd floor.

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment Attach View Delete Email

From -> PO DASM1-NEXT

OK Cancel Refresh

You may attach an associated document with the PO (i.e. quote, agreement, justification).

Click

Attach

PO Header Comments [Close]

Business Unit DASM1 PO ID NEXT Supplier SUBURB8829-001 [Help]

*Sort Method *Sort Sequence

Comments [Search] | < << 1 of 1 >> > | View All

Use Standard Comments Comment Status Active +

[Choose File]

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment	Attach	View	Delete	Email
	<input type="button" value="Attach"/>	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="checkbox"/>

From -> PO DASM1-NEXT

Click **Choose File** to search for document to attach.

PO Header Comments

Business Unit DASM1 PO ID NEXT Supplier SUBURB8829-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments

Use Standard Comments

Please deliver order to 3rd floor.

Send to Supplier Show at F Show at Voucher Approval

Associated Document

Attachment Attach View Delete Email

From -> PO DASM1-NEXT

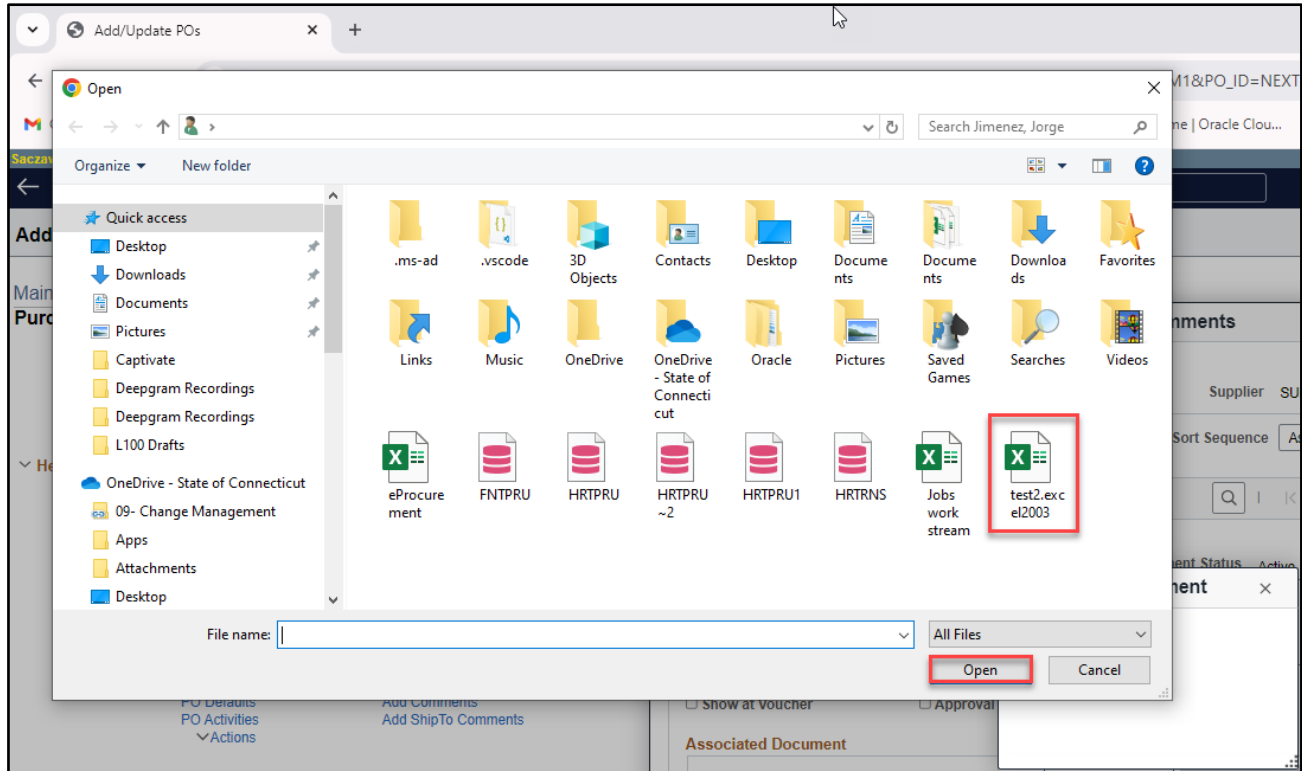
OK Cancel Refresh

File Attachment

Choose File No file chosen

Upload Cancel

Select the Document and Click **Open**.



Click



The screenshot displays the 'PO Header Comments' interface. At the top, it shows the Business Unit as 'DASM1', PO ID as 'NEXT', and Supplier as 'SUBURB8829-001'. Below this, there are dropdown menus for '*Sort Method' (set to 'Comment Time Stamp') and '*Sort Sequence' (set to 'Ascending'), along with a 'Sort' button. A search bar and navigation controls are visible. A comment box contains the text 'Please deliver order to 3rd floor.' Below the comment box, there are checkboxes for 'Send to Supplier' (checked), 'Show at Voucher', 'Show at PO', and 'Approval'. An 'Associated Document' table is visible with columns for Attachment, Attach, View, Delete, and Email. A 'File Attachment' dialog box is open, showing a file named 'test2.excel2003.xlsx' and an 'Upload' button highlighted with a red box.

The file is listed as an attachment. If necessary, you can **View** or **Delete** it. If you have more than one attachment, click on the + sign and add another comment box to add your second attachment. **Remember one attachment per comment.** If your PO is Dispatched via Email, and you would like your attachment to be emailed to the supplier then you are required to check **Email**.

PO Header Comments

Business Unit DASM1 PO ID NEXT Supplier SUBURB8829-001

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments 1 of 1 View All

Use Standard Comments Comment Status Active Inactivate +

Please deliver order to 3rd floor.

Send to Supplier Show at Receipt
 Show at Voucher Approval Justification

Associated Document

Attachment	Attach	View	Delete	Email
test2.excel2003.xlsx				<input checked="" type="checkbox"/>

From -> PO DASM1-NEXT

OK Cancel Refresh

Note: If you want to email the attachment along with the purchase order, don't forget you must check the Email Box to the right!

Click **OK** when you are done. You will be returned to the Main Page.

The link will now show as **Edit Comments** on the header page, if you have added a comment.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit DASM1 PO Status Open
 PO ID NEXT Budget Status Not Chk'd
 Copy From Hold From Further Processing

▼ Header ⓘ

*PO Date 08/13/2024 Supplier Search Doc Tol Status Valid
 *Supplier SUBURB8829-001 Supplier Details
 *Supplier ID 0000010291 SUBURBAN SANITATION SERVICE INC
 *Buyer 085741 DAS- Receipt Status Not Recvd
 PO Reference DASM1 000005025 Priority Medium
 *Dispatch Method Print Dispatch

Header Details Activity Summary
 PO Defaults Edit Comments
 PO Activities Add ShipTo Comments
 Actions

Amount Summary ⓘ

Merchandise	1,430.50	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	1,430.50 USD	
Obligation Amount	0.00	

Enter information on the Line:

Enter this information on the line before clicking into the line details.

Note: If the item is an Asset do **NOT** use Commas (,) in the description. It will cause problems during the Physical Inventory Process.

Add/Update POs

*Supplier SUBURB8829-001 Supplier Details
 *Supplier ID 0000010291 SUBURBAN SANITATION SERVICE INC
 *Buyer 085741 DAS- Receipt Status Not Recvd
 PO Reference DASM1 000005025 Priority Medium
 *Dispatch Method Print Dispatch

Amount Summary ⓘ

Merchandise	1,430.50	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	1,430.50 USD	
Obligation Amount	0.00	

Lines ⓘ

Details Ship To/Due Date Statuses Item Information Attributes B/FQ Contract Receiving ID

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGITPLATE	5.0000	EA	45000000	286.10000	1,430.50	Open

View Printable Version View Approvals *Go to ... More ...

Save Notify Refresh Add Update

Enter the **Description** for the goods/services. If your description exceeds 19 characters you can click on to open an expanded view window.

Purchase Order

[Help](#)

SILVER DIGITPLATE, 13" X 200" SPEC CODE 1520, 8 MIL POLYESTER PLATE MATERIAL-2

175 characters remaining

Return

Click **Return** to close the expanded view window.

Enter the **Quantity** ordered.

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text"/>	SILVER DIGIPLATE	5.0000	EA	44000000	298.10000	1,430.50	Open			

View Printable Version *Go to More ...

View Approvals

Save Notify Refresh

Add Update/Display

Enter the **UOM** (unit of measure). If you are unsure of the unit of measure, click the search icon. If you have entered a UOM default in the PO Defaults, you can skip this step.

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5,000			288.10000	1,430.50	Open

Click on the unit of measure to return to the main page.

Look Up UOM

[Help](#)

Unit of Measure begins with

Search Results

Only the first 300 results of a possible 889 can be displayed.

View 100 1-300 of 300

Unit of Measure	Description	Short Description
1	Actual Pounds	Actual Lbs
10	Group	Group
11	Outfit	Outfit
12	Packet	Packet
13	Ration	Ration
14	Shot	Shot
15	Stick	Stick
16	115 Kilogram Drum	115 K Drum
17	100 Pound Drum	100 lb Drm
18	55 Gallon Drum	55 gl Drum
19	Tank Truck	Tank Truck
1A	Car Mile	Car Mile
1B	Car Count	Car Count
1C	Locomotive Count	Locomo Cnt
1D	Caboose Count	Caboos Cnt
1E	Empty Car	Empty Car
1F	Train Mile	Train Mile
1G	Fuel Usage (Gallons)	Fuel Usage
1H	Caboose Mile	Caboose Mi
1I	Fixed Rate	Fixed Rate

Enter the **Category**.

If **Category** code is unknown, Click the Search icon.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5.0000			288.10000	1,430.50	Open

If you have entered a **Category** in the **PO Defaults**, you can skip this step.

Choosing a **Category** will activate the allowable tolerances as well as update the distribution with a default account code.

Use if the Category 00000000 or CT_UNSPCC is unacceptable on any contract or PO.
This value was included for users if they did not know the correct category, and it is the responsibility of the users/approvers to apply the correct category code.

X

Look Up Category

SetID STATE

Category

Description

Search Results

View 100 < < 1-57 of 57 > >


Category	Description
00000000	All Items
10000000	Live Plant and Animal Material
11000000	Mineral and Textile and Inedib
12000000	Chemicals including Bio Chemi
13000000	Resin and Rosin and Rubber and
14000000	Paper Materials and Products
15000000	Fuels and Fuel Additives and L
20000000	Mining and Well Drilling Machi
21000000	Farming and Fishing and Forest
22000000	Building and Construction Mach
23000000	Industrial Manufacturing and P
24000000	Material Handling and Conditio
25000000	Commercial and Military and Pr
26000000	Power Generation and Distribut
27000000	Tools and General Machinery
30000000	Structures and Building and Co
31000000	Manufacturing Components and S
32000000	Electronic Components and Supp
39000000	Electrical Systems and Lightin
40000000	Distribution and Conditioning

Click on the category to return to the Add/Update POs page.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5.0000	EA	44000000	286.10000	1,430.50	Open

Enter the Price.


Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5.0000	EA	44000000	286.10000	1,430.50	Open


If you have entered in a default category and UOM, enter in the price and press the Enter key or click  to pull in the default values.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5.0000	EA	44000000	286.10000	1,430.50	Open

The UOM and Category field update with the default values.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5.0000	EA	44000000	286.10000	1,430.50	Open

Click on the **Line Details Icon**  located to the left of the line of the PO that you want to work on. This will open the details for this line.

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		SILVER DIGIPLATE	5.0000	EA	44000000	286.10000	1,430.50	Open

Buttons: Save, Notify, Refresh, Add, Update/Display

Note: You can view the full item description here as well.

Click **Expand All** link to access all line detail information.


Details for Line 1

PO ID NEXT Supplier GRAING0280-001 Item ID SILVER DIGIPLATE

Line Details

Category	44000000	Line Status	Open
Description	Office Equipment and Accessori	Backorder Status	Not Backordered
Category ID	00051	Amount Summary	
Amount to Receive	USD	Merchandise Amount	1,430.50 USD
Quantity to Receive		Doc. Base Amt	1,430.50 USD

Transaction Item Description

SILVER DIGIPLATE 

238 characters remaining

Preferred Language Item Description

Expand All Collapse All

- > Item Information
- > Attributes
- > RFQ
- > Contract
- > Receiving
- > State of CT Custom Fields

Buttons: OK, Cancel, Refresh

The following fields should be updated:

Physical Nature should be verified, options are Goods or Services. The Default Value is Goods. The value of Goods is based on the category and should be changed **after** the category is selected if necessary.

The **Amount Only** checkbox should be selected if this to be an Amount Only PO.

Expand All Collapse All

Item Information

Supplier's Catalog

Supplier Item ID

Manufacturer ID

Description

Manufacturer's Item ID

UPN Type

UPN ID

Replenish Code

Stockless Item

Device Tracking

Withholding

Withholding Code

Attributes

Physical Nature

*Price Qty

*Price Date

Amount Only

Note: If this checkbox is selected, the distributions must also be distributed by Amount, not Quantity.

Attributes

Physical Nature

*Price Qty

*Price Date

Amount Only

Withholding Checkbox: The default withholding will automatically populate from the Supplier Profile, however if the withholding selection differs from the default, you are required to update this section. If withholding payment, check the Withholding box. If not a withholding payment, leave the Withholding box unchecked.

Withholding Code Box: Do not enter anything into the Withholding Code Box. The Withholding Code Box should always remain blank.

Preferred Language Item Description

Expand All Collapse All

Item Information

Supplier's Catalog

Supplier Item ID

Manufacturer ID

Description

Manufacturer's Item ID

UPN Type

UPN ID

Replenish Code Standard

Attributes

Physical Nature Goods

Stockless Item

Device Tracking

Withholding

Withholding Code

Contract ID: Contract ID is a required field when the Purchasing Authority is GEN / Contract. Type in the Contract ID or use the look up icon to select the appropriate contract for this purchase.

Contract

Contract SetID STATE

Contract ID

Contract Version

Contract Line

Category Line Number

Group ID

Contract Details

Milestone Line

Release NEXT

Rebate ID

Enter in the search criteria and click [Search](#) to view a list of possible contracts.
Click on the contract to return to the details page.

×
[Help](#)

SetID

Contract ID

STATE

Short Supplier Name

Description

Basic Lookup

Search Results

View 100
|< < 1-1 of 1 > >|

Supplier Set ID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date	Expire Date
STATE	0000010291	17PSX0189AE	SUBURB8829-001	Approved	DASM1 0000005025	12/22/2017	12/31/2024

✦ Tip: If you need information about the contract you have selected, you can click on the [Contract Details](#) link. This link will open a new window, where you can review the entire Contract, without closing out of the purchase order. You can close that Contract window when you are finished reviewing and be brought right back to completing your purchase order.

Contract
 Contract SetID STATE
 Contract ID
 Contract Version
 Contract Line
 Category Line Number
 Group ID
Contract Details
 Milestone Line
 Release NEXT
 Rebate ID

Select the **Purchasing Authority**:
 Click on the appropriate Purchasing Authority.

Details for Line 1
 Physical Nature
 *Price Qty
 *Price Date
 Amount Only
 RFQ ID
 Contract SetID STATE
 Contract ID
 Contract Version
 Contract Line
 Category Line Number
 Group ID
Contract Details
 Milestone Line
 Release NEXT
 Rebate ID
 *Receiving Required
 Inspection Required
 Inspect ID
 State of CT Custom Fields
 Purchasing Authority

Line
 Rebate ID 4a-66b
 CGS
 Cont. PO
 *Receiving Required **Contracts**
 GL71a
 GL71b
 Inspect ID
 GL71c
 GL71d
 GL71e
 GL71f
 GL71g
 CT Custom Fields
 Purchasing Authority

The current values in the drop-down list are:

4a-66b: Connecticut General Statute allowing the purchase from Federal GSA contract. **Prior approval must be obtained from DAS. In the line comments the GSA contract number must be input.**

CGS (Connecticut General Statute): **When this value is selected users are advised to list the appropriate statute in the line comments field.** This authority is used with the PO Type GEN or BLKT.

Cont PO (Continuous Purchase Order): To be used for online purchase orders that are continuous and the contract has expired, but a purchase order was already in place. Be sure to reference the Contract ID in the Description and/or Header Comments. This would be used with PO Types GEN or MLYR.

Contracts: (Default Value): When this value is selected, users must also fill in the appropriate contract number in the **Contract ID** field. The PO Type can be: CON, GEN, GRT, LOAN, MLYR, MOU, PSA, POS, RL, POC/N, PSC/N, ROW, SCS, UFA, MA or ST. **NOTE: You may combine GL and Contracts purchasing authorities within one purchase order – the PO Type would be GEN.**

Refer to the DAS website for limitations using GL Purchasing Authority.
<https://portal.ct.gov/-/media/DAS/Procurement-Services/Contracting/GL71-current.pdf>

GL71a: General Letter 71a,). (Refer to the DAS Website for GL Purchasing)

GL71b: General Letter 71b, (Refer to the DAS Website for GL Purchasing)

GL71c: General Letter 71c, (Refer to the DAS Website for GL Purchasing)

GL71d: General Letter 71d, (Non-competitive purchases for specific purchases)

GL71e: General Letter 71e, (Emergency repairs/purchases costing up (Refer to the DAS Website for GL Purchasing)

GL71f: General Letter 71f, (Purchase transactions among State agencies)

GL71g: General Letter 71g, (Purchases from US Govt, Federal Agency, State Agency or political sub-division)

If your purchasing authority is Contract, the contract selected on Line 1 will populate ALL lines of the PO upon clicking save. If you need to change this value to another contract ID on one or more lines, you will need to go to the specific line of the PO and update the Line Details page for that specific line item.

EXAMPLE: You have a 4 line PO. Two lines are for one contract, and two are for another. All four lines will default to the Contract ID entered in the line details of line 1 when you save. You must select the line details link and enter the correct Contract ID for any lines that are different than the Contract ID specified on Line 1 before you click save.

If you have combined lines with Contracts and GL on the same PO, the contract ID field for lines using GL must be blank.

Contract Line: If the contract referenced in the Contract ID field is a fixed item contract with contract lines (POC Comp or Non-Comp; PSC Comp or Non-Comp; or SCS), the contract line field on the PO **must** contain the associated line number from the contract. If the PO is copied from a contract, the appropriate line number will auto-populate.

Receiving Required: Receiving required is mandatory on all purchase orders.

Inspection Required: The default value is un-checked. If the purchase is for a commodity that requires inspection of the product you need to place a check in this checkbox. This will require the goods to be inspected as part of the receiving process and will force a 4 way match requirement (PO > Receipt > Inspection > Voucher must all match).

Click  when done.

The screenshot shows a web form with two main sections:

- Receiving:** A dropdown menu for '*Receiving Required' is set to 'Required'. Below it is an unchecked checkbox for 'Inspection Required' and a text input field for 'Inspect ID'. A 'Close Short' checkbox is located to the right of this section.
- State of CT Custom Fields:** A dropdown menu for 'Purchasing Authority' is set to 'Contracts'.

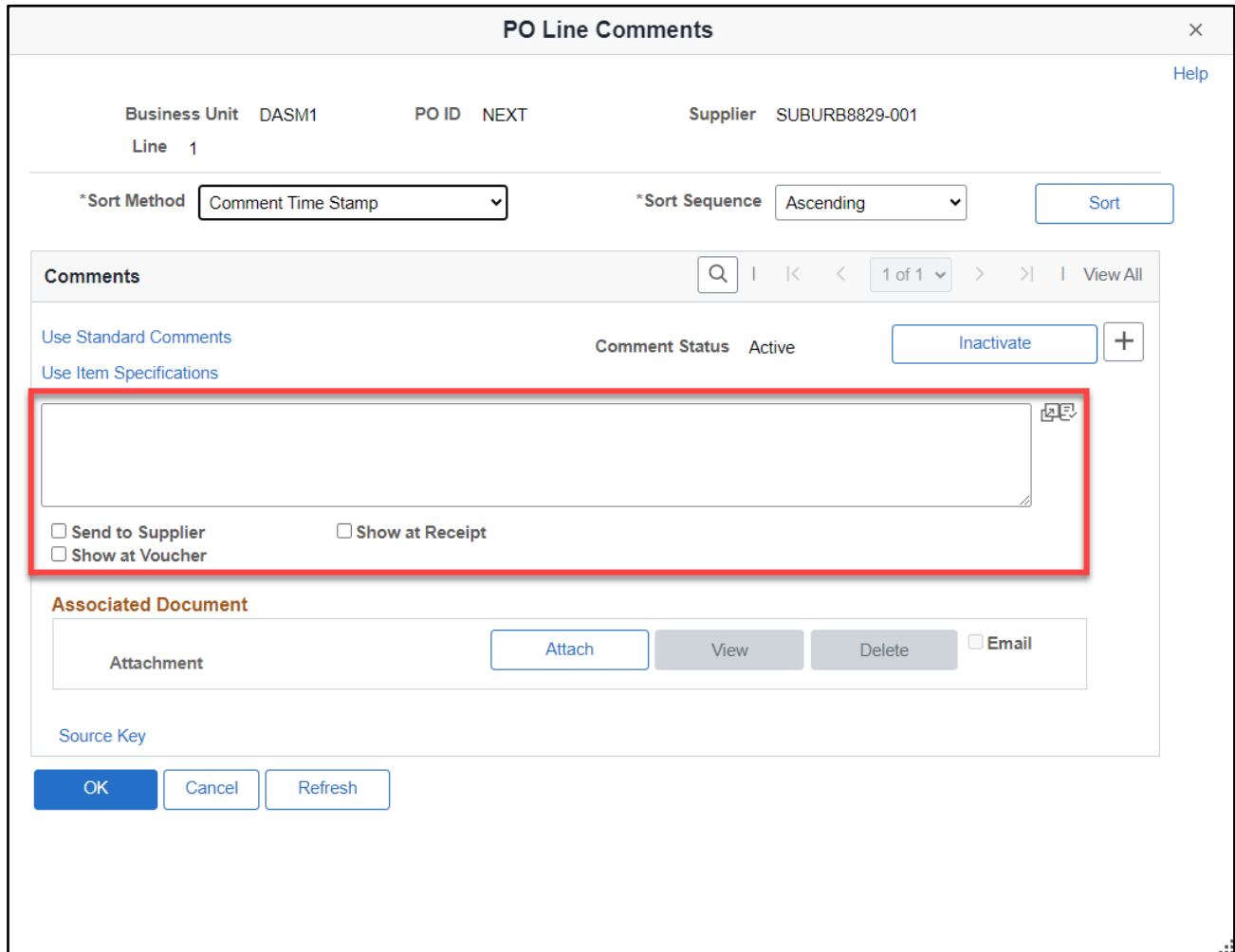
At the bottom of the form, there are three buttons: 'OK' (highlighted with a red border), 'Cancel', and 'Refresh'.

You will be returned to the **Add/Update POs** page.

If you need to add **Line Comments** click on the white conversation bubble .

This comment is for this specific line, where the Header comment section mentioned above, was to comment on the entire PO.

Add your comments and click the appropriate action, such as **Send to Supplier**, **Show at Receipt**, or **Show at Voucher**.



PO Line Comments

Business Unit DASM1 PO ID NEXT Supplier SUBURB8829-001
Line 1

*Sort Method *Sort Sequence

Comments | < > 1 of 1 | View All

Use Standard Comments Comment Status Active +
Use Item Specifications

Send to Supplier Show at Receipt
 Show at Voucher

Associated Document

Attachment Email

Source Key

If necessary, you may attach an associated document with this line item (i.e. quote).

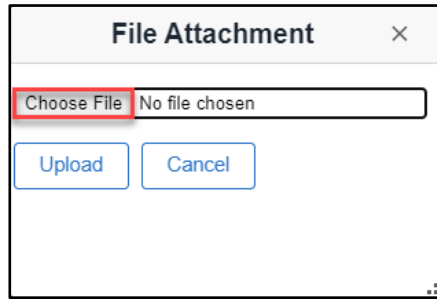
Click .



Associated Document

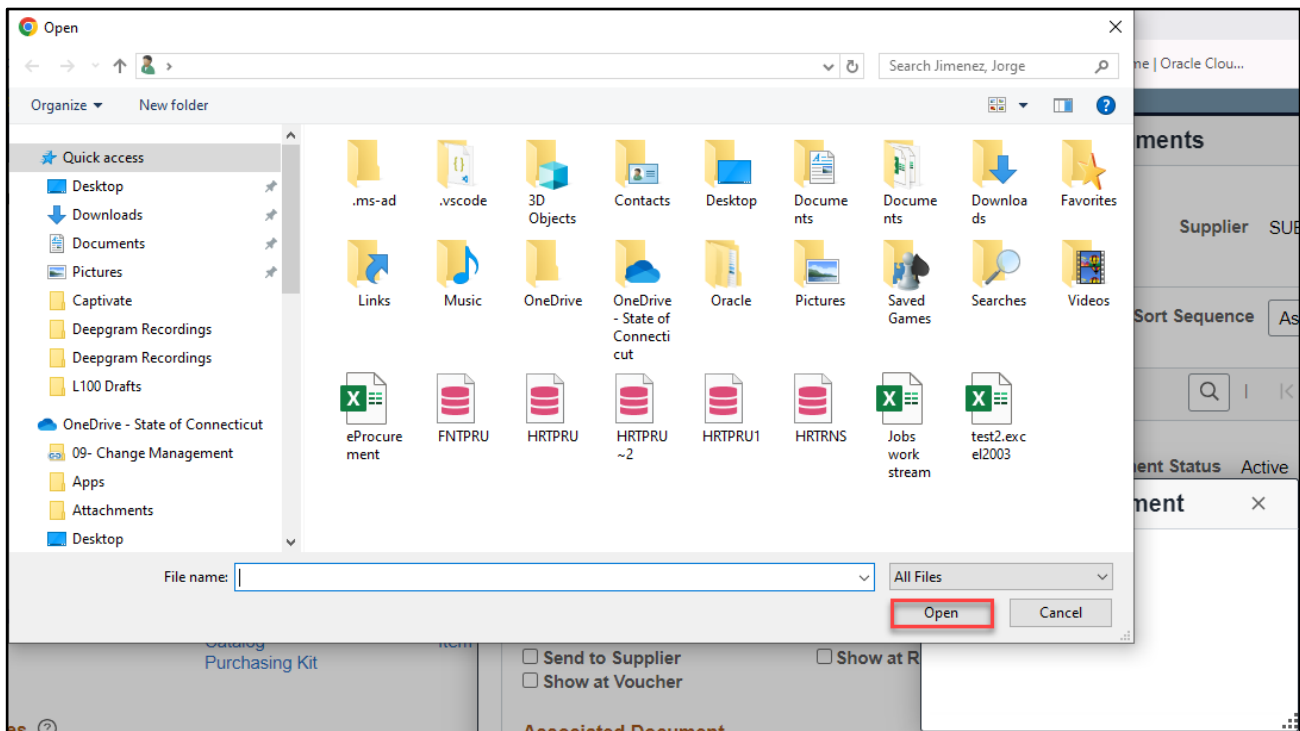
Attachment Email

Click **Choose File**.

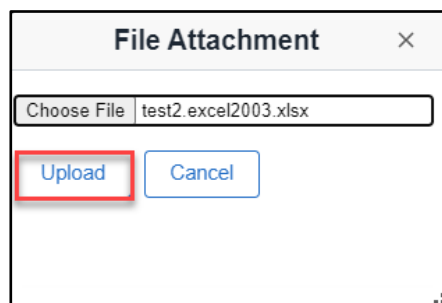


Search for the document you wish to attach.

Click **Open**.



Click **Upload**.





The file is listed as an attachment. If necessary, you can view or delete it. If more than one attachment please add an additional comment by using the + sign. Each attachment requires a separated comment.

It is unacceptable to attach a listing of items that you would like to purchase to the PO, and in the description line on the PO state, “See attached list”, when sending to a supplier.

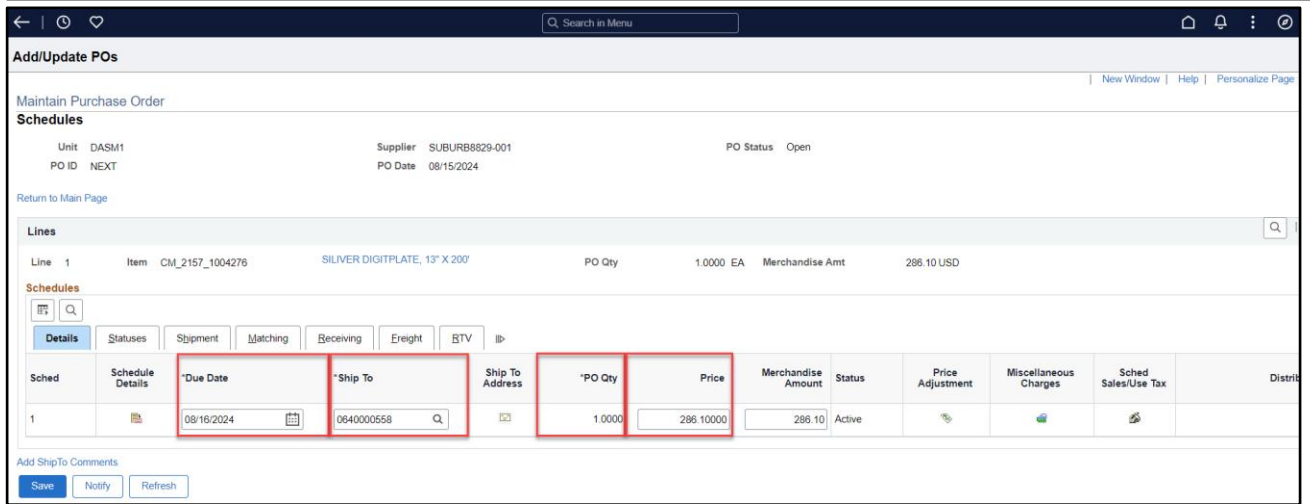
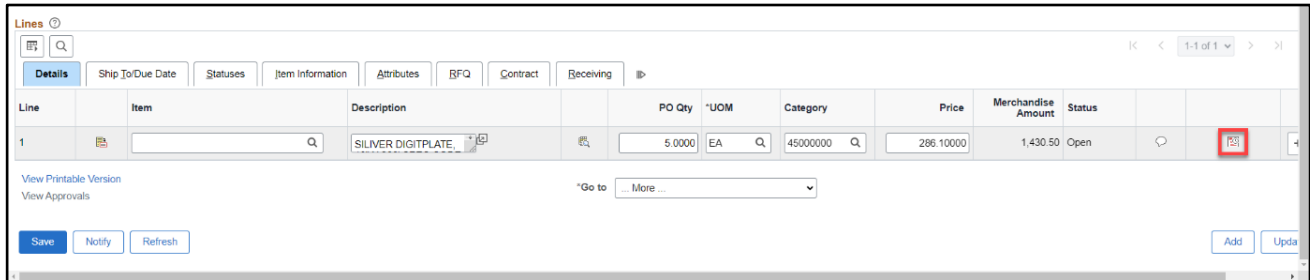
****Note: If you want to email the attachment along with the purchase order, you must check the Email Box to the right!****


Click **OK** when you are done. You will be returned to the Main Page.

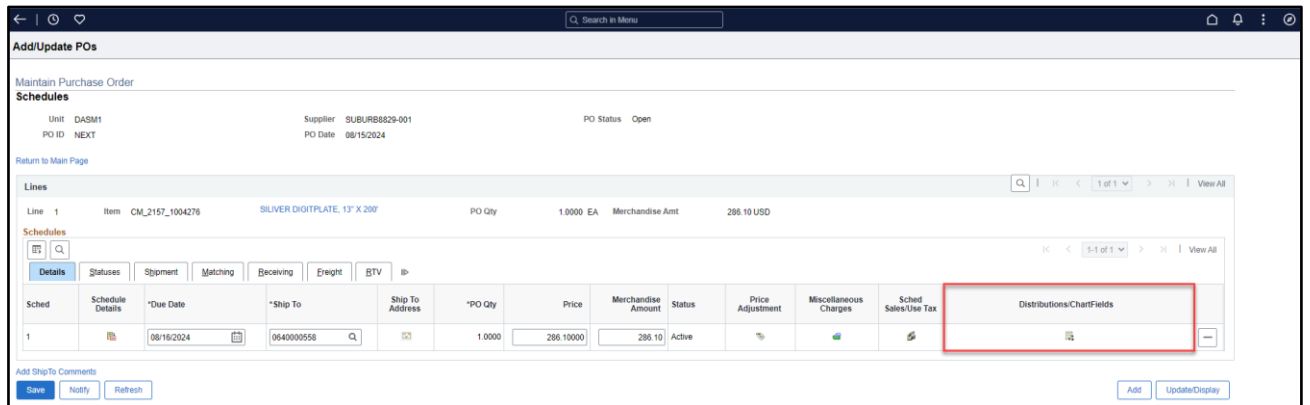
The conversation bubble  will have lines in it , if you have added a comment.

Click on the **Schedule Icon**  located to the right of the Line Comments Icon .

Information will default onto the Schedule Page based on the buyer; the date the PO was entered and PO line information, even if PO Defaults are not used. These fields may also default based on your entries in the PO Defaults. You can alter the **Due Date**, **Ship To**, **PO Quantity** and **Price** information for each line item.



Click on the **Distributions/Chartfields Icon**  to enter/view the chartfield information. This information will default in if you have used the PO Defaults link on the Main Page



As a reminder, **you must select Amount in the Distribute by: field if you are creating an Amount Only purchase order.** Remember that the Default Value for this field is Quantity and must be changed to Amount, if necessary. If you changed it to Amount in the PO defaults it will carry over to the Distribute By field on the Distribution line.

Distributions for Schedule 1

Unit DASM1 Supplier SUBURB8829-001
 PO ID NEXT Item CM_2157_1004276 SILVER DIGITPLATE, 13" X 200"
 Line 1
 Schedule 1 Status Active

*Distribute By: Amount
 Amount
 Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty: 1.0000
 Merchandise Amount: 286.10 USD
 Doc. Base Amount: 286.10 USD

Distribution

Dist↑	Status	Percent	Merchandise Amount	Currency	*GL Unit	Fund	Dept	SID	Program	*Account↑
1	Open	100.0000	286.10	USD	STATE		DAS23920			54180

OK Cancel Refresh

Warning on the Account code: If the category on the line is changed after the account code distribution is entered, it will update the account code back to the category default code.

If the item, you are purchasing is an Asset click on the **Asset Information** link, and select your **Asset Management Unit** and Asset **Profile ID**.

After inputting your **Asset Information**, Click OK.

You will be returned to the Schedules Page.

Distributions for Schedule 1

Unit: DASM1 Supplier: SUBURB8829-001
 PO ID: NEXT Item: SILVER DIGITPLATE, 13" X 200"
 Line: 1
 Schedule: 1 Status: Active

*Distribute By: Quantity Schedule Qty: 5.0000
 Merchandise Amount: 1,430.50 USD
 Doc. Base Amount: 1,430.50 USD

SpeedChart: Multi-SpeedCharts

Distribution

Chartfields Details/Tax **Asset Information** Req Detail Statuses Budget Information

Dist↑	Status	Percent	AM Unit	Profile ID	CAP #	Sequence	Tag Number	Empl ID	Capitalize	Cost T
1	Open	100.0000	DASM1	ICNTRLITEM					<input type="checkbox"/>	

OK Cancel Refresh

*** Note: Do not check the Capitalize box for Assets. ***

For more information on Assets, please view the Asset management Job Aids.

<https://www.core-ct.state.ct.us/financials/asset/Default.htm>

If you are done working on the PO, but do not want to submit it, click **Return to Main Page** link.

Add/Update POs

Maintain Purchase Order

Schedules

Unit: DASM1 Supplier: SUBURB8829-001 PO Status: Open
 PO ID: NEXT PO Date: 08/15/2024

[Return to Main Page](#)


Lines


Line	Item	Item Description	PO Qty	EA	Merchandise Amt
1	CM_2157_1094276	SILVER DIGITPLATE, 13" X 200"	1.0000	EA	286.10 USD

Schedules

Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Use Tax	Distributions/ChartFields
1		08/16/2024	0640000558		1.0000	286.10000	286.10	Active				

Save notify Refresh Add Update/Display

If you are done working on the PO, but do not want to submit it, Click . This will assign the PO a number and keep it in open status. You may go back at any time to this PO to finish your work.




- If you are finished with the PO, Click on the Green Check Mark  in the upper right-hand corner of the PO. This will submit the PO and send the PO into the workflow process for approval.

Add/Update POs

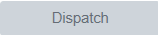
Maintain Purchase Order





Purchase Order

Business Unit DASM1
 PO ID 0000021084
 Copy From

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

Doc Tol Status Valid

Receipt Status Not Recvd
 Priority Medium
 *Dispatch Method Print 

*PO Date 08/15/2024  Supplier Search
 *Supplier SUBURB8829-001  Supplier Details
 *Supplier ID 0000010291  SUBURBAN SANITATION SERVICE INC
 *Buyer 085741  DAS

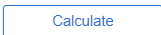
PO Reference DASM1 0000005025

Header Details
 PO Defaults
 PO Activities
 Actions

Activity Summary
 Add Comments
 Add ShipTo Comments

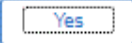
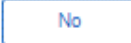
Amount Summary

Merchandise	286.10	
Freight/Tax/Misc.	0.00	
Total Amount	286.10	USD
Obligation Amount	286.10	



If you have not saved the PO previously, you will receive the following message before it submits for approval:

Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.

Click .

The **PO ID** will be assigned (if it has not been previously saved) and the **PO Status** will show as Pend Appr.

Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit **PO Status** Pend Appr ✖

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

Copy From

▼ **Header** ⓘ

*PO Date Supplier Search

*Supplier Supplier Details

*Supplier ID SUBURBAN SANITATION SERVICE INC

*Buyer DAS-

PO Reference Doc Tol Status Valid

[Header Details](#) [Activity Summary](#)
[PO Defaults](#) [Add Comments](#)
[PO Activities](#) [Add ShipTo Comments](#)
[Actions](#)

Receipt Status Not Recvd
Priority
*Dispatch Method

Amount Summary ⓘ

Merchandise	286.10	
Freight/Tax/Misc.	0.00	
Total Amount	286.10	USD
Obligation Amount	286.10	

If you would like to see a screenshot of the purchase order, Click **View Printable Version**.

Add Items From ⓘ Catalog Purchasing Kit Item Search

Lines ⓘ

1-1 of 1

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	<input type="text"/>	SILVER DIGITPLATE <input type="button" value="Search"/>	1.0000	EA <input type="button" value="Search"/>	45000000	286.10000	286.10	Pending

[View Printable Version](#) *Go to ... More ...

Once you click on the link; a pop up window will open asking if you would like to print the distribution details. If you say yes, you will see the purchase order viewable screen with the distribution details. If you say NO, it will not have the distribution details. This page will be for your viewing only. This is not a dispatched PO, or the version of the purchase order that goes to the vendor. Please see other job aid to Dispatch a purchase order.

Do you want to print the purchase order with distribution details Yes / No. (10250,337)



Creating a Purchase Order in Core-CT

A new window will open with a PDF version a viewable version of the Purchase Order.

Purchase Order Page: 1 of 1

Dept of Administrative Svcs
Accounts Payable
450 Columbus Blvd
Hartford CT 06103
United States

Pending Approval/Approved		Dispatch Via Print
Purchase Order DASM1-0000021084	Date 08-15-2024	Revision
Payment Terms Due Now	Freight Terms FOB Destination, Frt Prepaid	Ship Via Common Carrier
Buyer DAS-I	Phone/ Email doit.core.emailtest@ct.gov	Currency

Supplier: 0000010291
SUBURBAN SANITATION
SERVICE INC
PO BOX 307
CANTON CT 06019
United States

Ship To: 450 Columbus Blvd
Hartford CT 06103
United States

Attention: Not Specified

Bill To: Accounts Payable
450 Columbus Blvd
Hartford CT 06103
United States

Tax Exempt? Y **Tax Exempt ID:** 066000798DAS **Replenishment Option:** Standard

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1 - 1	SILVER DIGITPLATE, 13" X 200" SPEC CODE 1520, 8 MIL POLYESTER PLATE MATERIAL--2	MITSUBISHI	1.00	EA	286.10	286.10	08/16/2024

DIST: 1

Chart Fields

Status	Percentage	PO Qty	Amount
Open	100.0000	1.0000	286.100

GL Unit	Account	Fund	Dept	Program	Class
STATE	54060	1100	DAS2392	00000	12155
		0	0		

PC Bus Unit	Project
NONPC	DAS_NONPRO JECT

Base Amt	Base Currency	Currency	Location	Consignd
286.100	USD	USD	ACORE	N

Alt Unit	Profile ID	Sequence	Capitalize
DASM1	ISTEIMPRO	0	N

Schedule Total 286.10

Contract ID: 17PSX0189AE Contract Line: 0 Release: 184 Category Line: 0

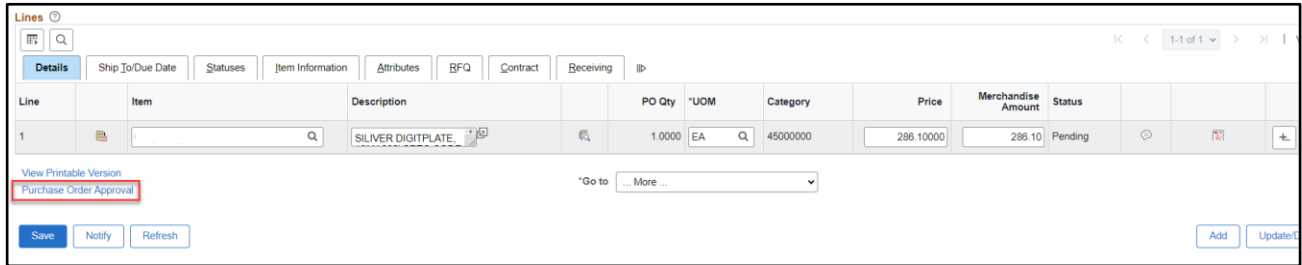
Item Total 286.10
CM_2157_1004276

Total PO Amount 286.10

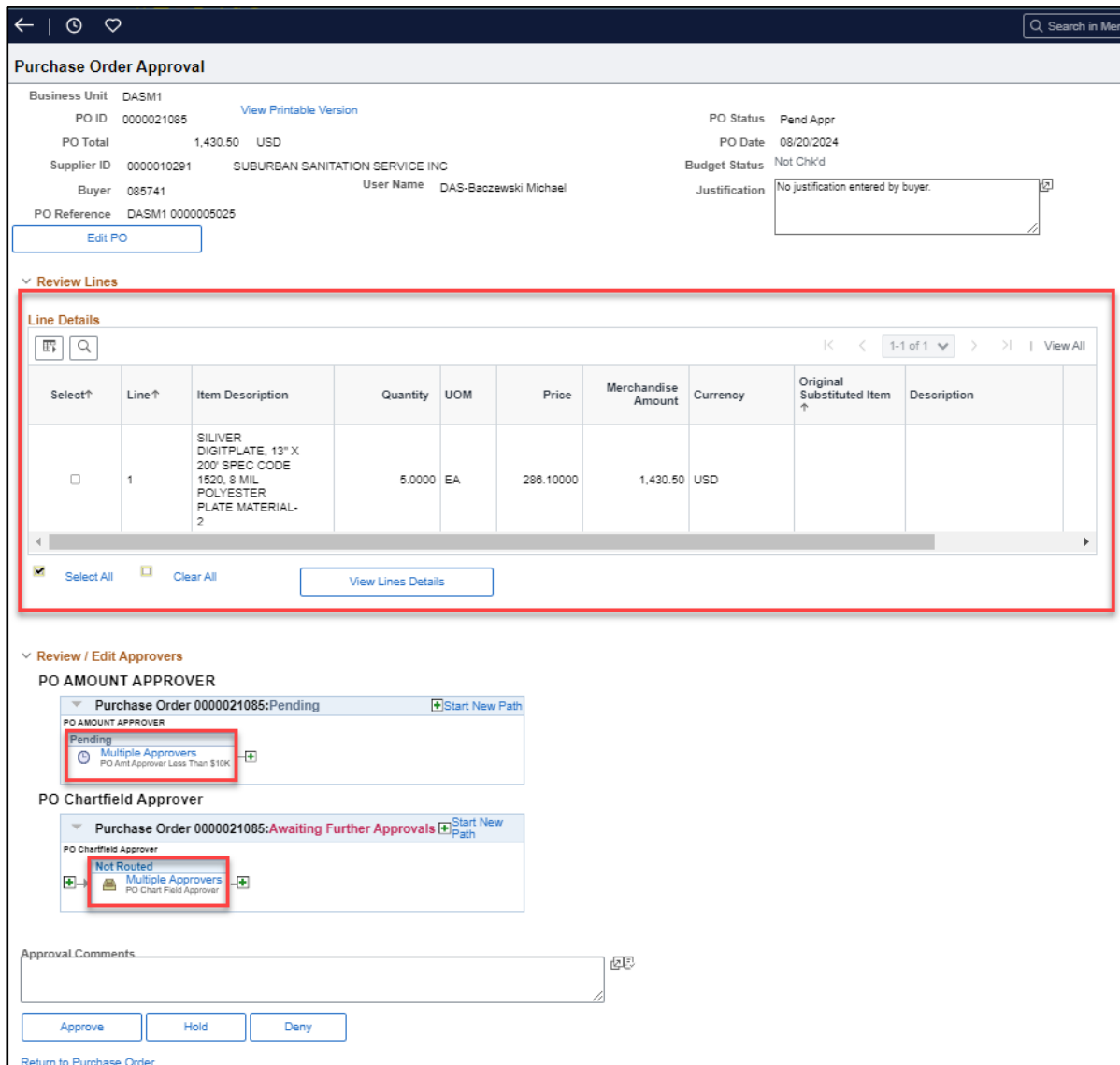
The Total Obligation 286.10
For time period 08/15/2024 to 06/30/2025

NOTE: In this sample, the distribution details were included.

You also have the options to view the approval chain for this order. Click **Purchase Order Approval**.



To view the approval group that can approve this PO for this buyer, click **Multiple Approvers**. This will open a window with all the approvers allowed for this type of approval.



At anytime during the order process, a buyer or an approver can view the approval list to see who can approve, or who has approved an order.

Click **Close** to close the window.

corefntpru.ct.gov/psc/FNTPRU_2/EMPLOYEE...

corefntpru.ct.gov/psc/FNTPRU_2/EMPLOYEE/ERP/...

Approver #1
Name: DAS-
Empl ID:
Department:
Supervisor ID:
Telephone:
Reports To Position Number:
Email ID: doit.core.emailtest@ct.gov

Approver #2
Name: DAS-
Empl ID:
Department:
Supervisor ID:
Telephone:
Reports To Position Number:
Email ID: doit.core.emailtest@ct.gov

Close

Purchase Order Approvals

- Please see the separate job aid on Purchase order Approver
- Please see the separate job aid on Approvals and How to Adhoc an Approver/Reviewer into Workflow for more information on these topics.

Budget Checking the PO

Once a Purchase Order has attained the PO Status of Approved, it will be available for inclusion in the next scheduled batch Budget Check. Budget check is scheduled to run at approximately 10am, 12pm, 2pm and overnight. If you are not able to wait for the purchase order to budget check with the Batch, an agency user can budget check right on the PO header. There is a Budget check Icon.

- Please see the separate job aid on [Budget check from PO Header](#)

Upon successful completion of the Budget Checking process, the Budget Status field on the PO header page will indicate Approved/Valid. The PO will now be available for inclusion in the next scheduled batch PO Dispatch (unless the “Hold From Further Processing” checkbox has been checked). POs are dispatched via Email and EDX during the Batch Process at (10am, 12 Noon, 2PM and overnight). Agencies are responsible to Dispatch their own Print POs.

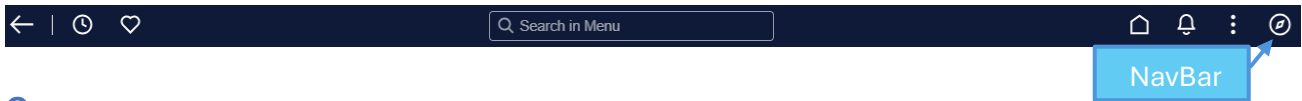
Once the Budget Check process completes and the Budget Status field on your PO indicates Error, it is the responsibility of the **buyer** to make the necessary changes to PO to correct the error as soon as possible. A PO with a status of Error is not available for dispatch.

Encumbrance

Once a purchase order has been approved and budget checked, the encumbrance amount will be available to view on the purchase order.

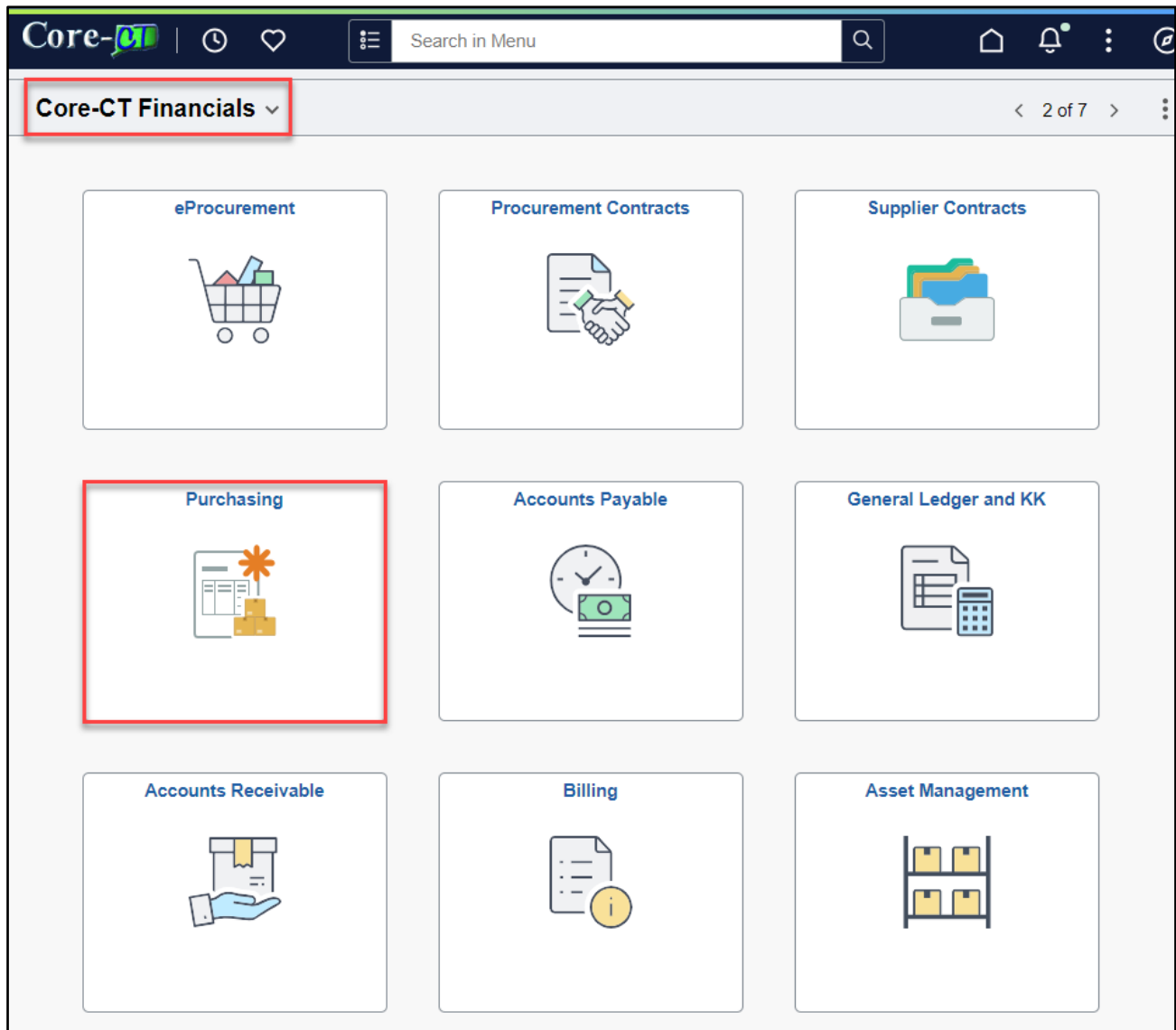
Once a Purchase Order has been successfully Budget Checked and Dispatched, the encumbrance will be available for Receipt and Vouchering.

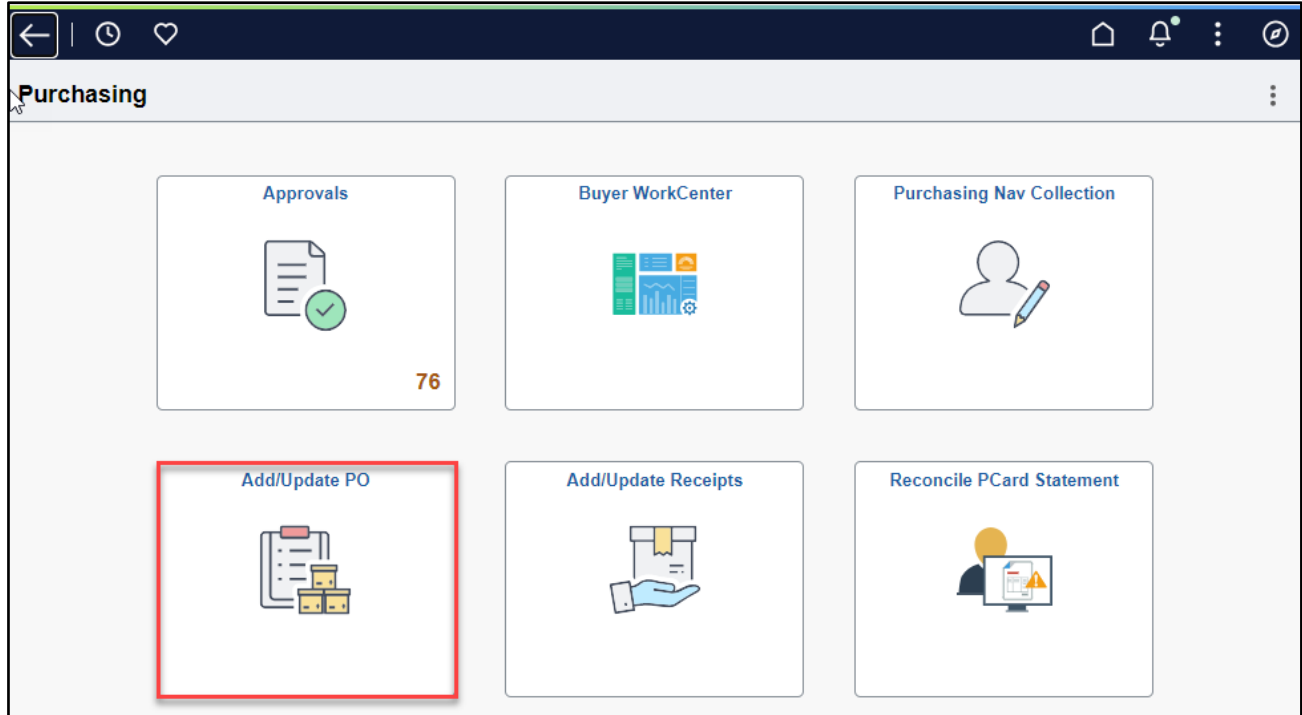
Navbar>Menu>Core-CT Financials > Purchasing> Purchase Orders>Add/Update PO



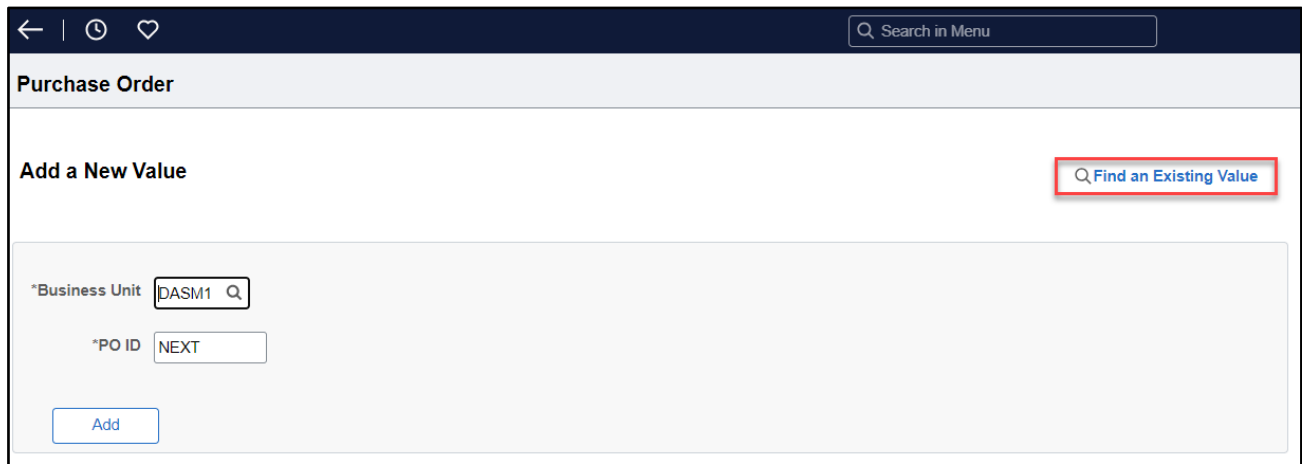
Or

Core-CT Financials >Purchasing> Add/Update PO





Click **Find an Existing Value**.



The purchase order will open. Under the Account Summary, there will be an Encumbrance line. Click on the value to see the PO Accounting Entries Page.

Purchase Order

Maintain Purchase Order

Purchase Order

Business Unit DASM1
 PO ID 0000017066
 Change Order 4
 Copy From [Dropdown]

PO Status Pend Appr
 Budget Status Not Chk'd
 Hold From Further Processing

Doc Tol Status Valid
 Backorder Status Not Backordered
 Receipt Status Partial
 Priority Medium
 *Dispatch Method Print

*PO Date 01/24/2020
 *Supplier FUSSON5648-001
 *Supplier ID 0000010382
 *Buyer 546750
 PO Reference BI-2B-346R/24/38 WOLCOTTHILL

Supplier Search
 Supplier Details
 FUSS & O'NEILL INC
 DAS-
 Header Details
 PO Defaults
 PO Activities
 Requisitions
 Activity Summary
 Add Comments
 Add ShipTo Comments
 Document Status

Amount Summary

Merchandise	62,000.00	USD
Freight/Tax/Misc.	0.00	
Total Amount	62,000.00	USD
Encumbrance Balance	2,349.50	USD
Obligation Amount	62,000.00	

Add Items From [Catalog] [Item Search]

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

Scroll through and click on the various links to view detailed accounting information.

Clicking on the **\$2,349.50** in the Encumbrance Balance field will display the PO Accounting Entries.

PO Accounting Entries

Business Unit DASM1
 Purchase Order 0000017066

Accounting Entries

Purchase Order	Status	Supplier ID	Change Order	Trans Type	Unpost Seq	Line	Sched	Dist	Fund	Dept	SID	Program	Account	Bud Ref	ChartField 1	ChartField 2	Ch
0000017066	PA	0000010382	4	PO_POENC	0	1	1	1	17911								
0000017066	PA	0000010382	4	PO_POENC	0	1	1	1	17911								
0000017066	PA	0000010382	4	PO_POENC	0	1	1	1	17911								

Total Encumbrance Balance 2,349.50 USD

[Notify] [Refresh]

PO Accounting Entries														
artField 3	PC Bus Unit	Project	Activity	Analysis Type	Source Type	Category	Subcategory	Entry Event	GL Unit	Encumbrance Balance	Currency	Monetary Amount	Base Currency	Closed Value
	DASM1	DASX28346	12920	COM					STATE	0.000	USD	0.00	USD	Y
	DASM1	DASX28346	12920	COM					STATE	41,200.000	USD	41200.00	USD	N
	DASM1	DASX28346	12920	COM					STATE	0.000	USD	0.00	USD	N

Clicking on the **\$62,000.00** in Obligation Amount field will take you to the Header Details to update the Obligation dates or Amount.

PO Header Details

PO Details

Supplier: FUSSON5648-001 PO Date: 01/24/2020

*PO Type: SCS Budget Status: Not Chk'd

*Billing Location: DASM1ADI Billing Address: Tax Exempt

Origin: 109 Bus Office: ID: 066000798DAS

Use One Ship To Letter of Credit ID: Ship To: 0640000558

Currency

Currency Code: USD Exchange Rate Detail: Base Currency: USD

Rate Date: 01/01/1900 Exchange Rate: 1.00000000

Rate Type: CRRNT

Process Control Option

Dispatch Acknowledgements required for: Not required

*Method: Print Accounting Date: 07/01/2023

Accounting Template: STANDARD

▼ Obligation Amount

Obligation Amount: 62,000.00

Start Date: 01/24/2020

End Date: 06/30/2024

Close the window when you are done to return to the purchase order.

End of Procedure.