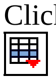
Generating a PO (O9) from an Existing Service Contract (O4) Lesson

Step	Action
1.	Click the **State of Nebraska** link. State of Nebraska
2.	Click the **Purchasing - Agencies** link. Purchasing - Agencies
3.	Click the **Purchase Orders - Agency** link. Purchase Orders - Agency
4.	Click the **Service Purchase Order - Agency** link. Service Purchase Order - Agency
5.	Click the **Generate Service PO - Agency** link. Generate Service PO - Agency
6.	Click the **Gen Service PO (O9) from Contract (O4)** link. Gen Service PO (O9) from Contract (O4)
7.	Enter the order number in the **Order Number** field, to minimize the search.
8.	Click the **Find** button. 
9.	Click the check box of the desired Order Number and Detail Line on the grid. 
10.	Click the **Row** button. 
11.	Click the **Order Release** menu. Order Release
12.	**HEADER INFORMATION** Review the following fields on the Header and make changes if needed. **Business Unit** – a valid Business Unit for your agency **Supplier** – Leave this value – it reflects the vendor that received the contract award. **Buyer** –you can populate with the address book record for the individual in your agency who will be responsible for the Purchase Order **Ship To** – change to reflect a delivery location for your agency **Note**: The Send Invoice To field cannot be changed when generating a Service Contract from a Requisition. When finished generating the Service Contract, the agency will need to revise the document.

Step	Action
13.	**Release Information** **Release Qty** field will populate with the quantity of the contract. Change this quantity to the number of items to order on Purchase Order ***Note:*** If quantity is not changed, there will be no more units of this item to be released to subsequent PO's and you will be ordering a large quantity of this item.
14.	Do not change the **Release Amt** field. This will automatically calculate when **Release Qty** field is updated.
15.	**Detail Information** Review the **Account Number** field. Change to a valid Account Number for your agency if necessary.
16.	**Dates** Review the **Requested** field. Enter the date you want to receive the order. This field automatically populates with the requested date from the contract.
17.	In the **Promised Delivery** field enter the day you expect the order to be received. This field automatically populates with the current date. This must be changed for accurate reporting.
18.	The **G/L Date** field defaults from the G/L Date from the contract.
19.	The **Cancel Date** field will automatically default to the Cancel date of the contract. To alleviate encumbrance issues this date must be removed.
20.	When you are finished click the **OK** button. 
21.	If multiple rows were chosen, the **Order Release** window refreshes with the next item. Repeat the previous steps for each Inventory Number that you wish to include on the Service Contract.
22.	If you want to review the contract before it is generated follow these steps. Click **Form, Review Order**. The Gen PO (O9 or Z8) from Service Contract (O4) - Suppliers Selected window appears. Choose the order(s) to review prior to generation. Click **Row, Details**. The Gen PO (O9 or Z8) from Service Contract (O4) - Items Selected for Order window appears. When you are finished reviewing click **Cancel**. If you do not wish to review the contract skip to the next step.
23.	Click the check box of the Order Number in the Detail Line. 

Step	Action
24.	Click the **Form** button.
25.	Click the **Generate Order(s)** menu. Generate Order(s)
26.	The new **Order Number** and **Or Ty** (Order Type) will appear and should be recorded for future use.
27.	The newly generated purchase order will need to be revised. Click the **Row** button.
28.	Click the **Open Order Inquiry** menu. Open Order Inquiry
29.	Choose the document by clicking the check box in the detail line.
30.	Click the **Row** button.
31.	Click the **Header Revision** menu. Header Revision
32.	**Send Invoice To** Delete the information from this field and press the tab key. The correct Send Invoice To address book number will default. This can be overridden with another address book number if needed.
33.	**Cancel Date** - remove the cancel date.
34.	Data on the **Additional Properties** tab provides information about the document: Document Description, Document Location, and Document Contact
35.	Click the **Category Codes** tab. Category Codes
36.	**Category Codes**
37.	Click in the **Funding** field.
38.	If **American Recovery & Reinvestment Act** (**ARRA**) funds are being used for this purchase enter a valid value e.g. "**AR**" into the **Funding** field.
39.	When you are finished updating the Header click the **Form** button.
40.	Click the **Header To Detail** menu. Header To Detail

Step	Action
41.	Click the **Populate** menu. This will make all relevant changes made to the Header appear in the Detail Line as well. **POPULATE HEADER TO DETAIL** will appear on the **Order Detail** tab showing the information from the Header populated to the Detail Line. If you forgot to populate from the Header to the Detail Line you will need to manually update the Detail Line. Populate
42.	Click the **OK** button.
43.	Click the **OK** button.
44.	A Warning Error - Event Still in Process will occur. This is okay. Click the **OK** button.
45.	Enter the desired information into the field. Enter a valid value e.g. "**Purchase Order from a Contract**".
46.	Since you made changes to the Purchase Order you will need to document what changes you made.
47.	Click the **OK** button.
48.	Click the **Close** button.
49.	Click the **Close** button.
50.	Click the **Close** button.
51.	You have successfully completed this lesson. **End of Procedure.**