

## **Generating a Purchase Order from an Existing Service Contract (O4)**

### **Overview**

The Service Contract is non-encumbering and not budget checked. Purchase Orders will be generated from the Service Contract. The end user can generate multiple Purchase Orders from a single Service Contract.

This work instruction shows how to [Generate a PO from an Existing Service Contract](#).

### **NIS Policies**

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Administrative Services website: [www.das.state.ne.us](http://www.das.state.ne.us).

### **Navigation**

Click Roles, Procurement.

(Citrix users – right click on the menu, choose View by Role, choose Procurement.)

Purchasing – Agencies > Purchase Orders – Agencies > Service Purchase Order – Agency > Generate Service PO – Agency:

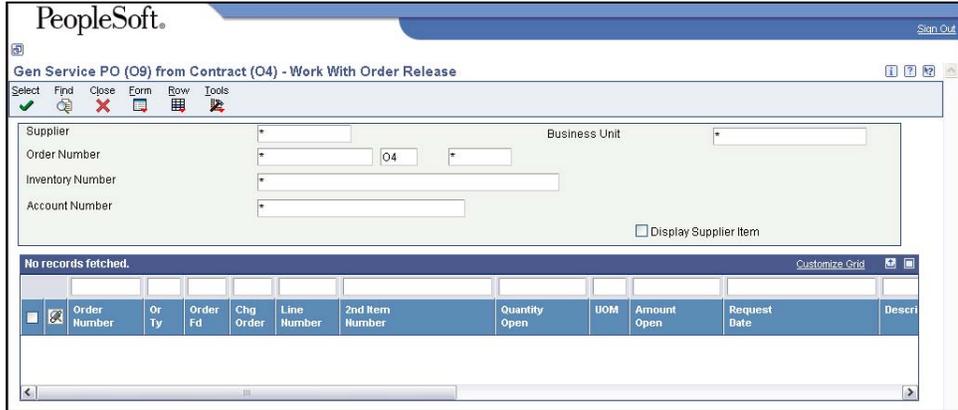
Gen Service PO (O9) from Contract (O4), or

Gen Service PO (Z8) from Contract (O4)

### **Steps**

#### **Generate a PO from an Existing Service Contract**

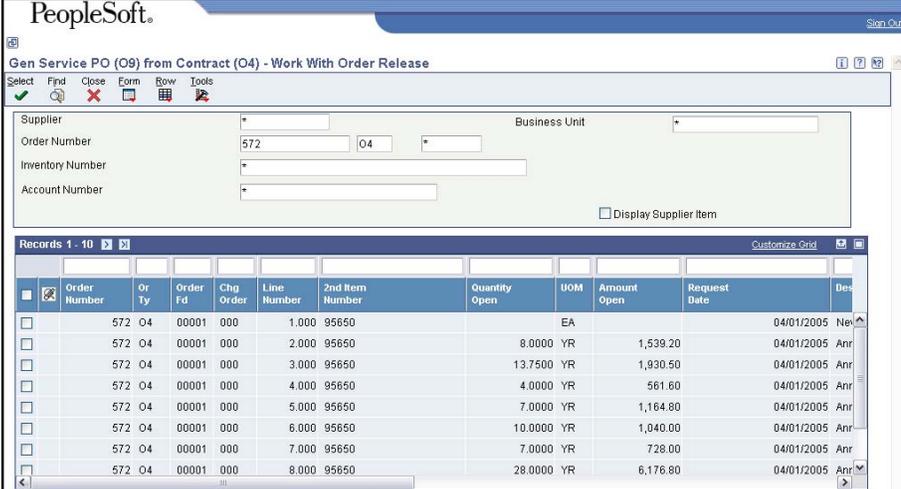
Start this instruction from the Gen PO (O9 or Z8) from Service Contract (O4) - Work With Order Release window.



Order Number	Or Ty	Order Id	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Amount Open	Request Date	Descri
No records fetched.										

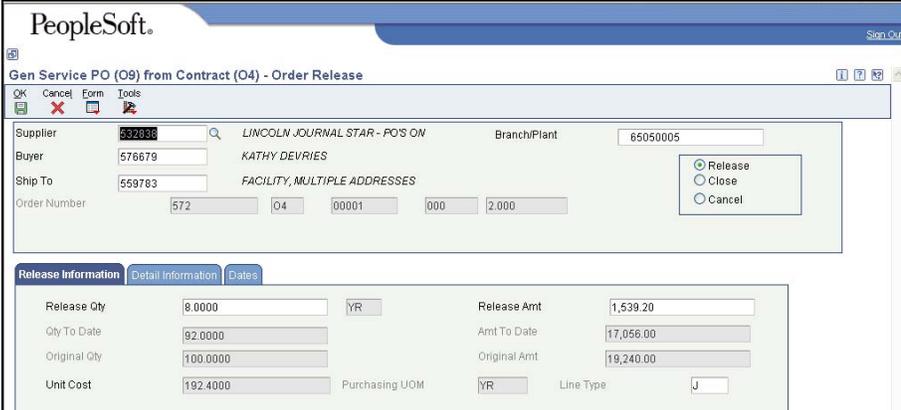
-  Enter any known information in the header or QBE line to minimize the search.

1. Click **Find**.



Order Number	Or Ty	Order Id	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Amount Open	Request Date	Description
572	O4	00001	000	1.000	95650		EA		04/01/2005	New
572	O4	00001	000	2.000	95650	8.0000	YR	1,539.20	04/01/2005	Anr
572	O4	00001	000	3.000	95650	13.7500	YR	1,930.50	04/01/2005	Anr
572	O4	00001	000	4.000	95650	4.0000	YR	561.60	04/01/2005	Anr
572	O4	00001	000	5.000	95650	7.0000	YR	1,164.80	04/01/2005	Anr
572	O4	00001	000	6.000	95650	10.0000	YR	1,040.00	04/01/2005	Anr
572	O4	00001	000	7.000	95650	7.0000	YR	728.00	04/01/2005	Anr
572	O4	00001	000	8.000	95650	28.0000	YR	6,176.80	04/01/2005	Anr

2. Choose the desired **Order Number** and **Detail Line(s)** on the grid.
3. Click **Row, Order Release**. The Gen PO (O9 or Z8) from Service Contract (O4) – Order Release window appears.

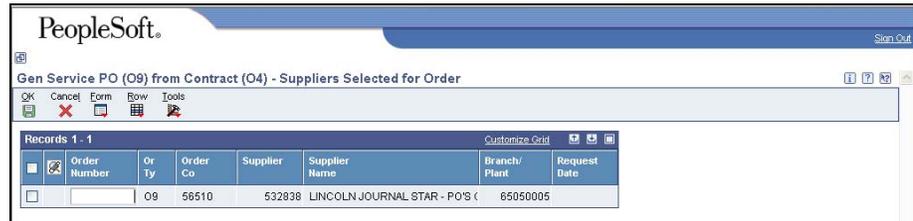


Supplier	Buyer	Ship To	Order Number	Release Qty	Release Amt	Qty To Date	Amt To Date	Original Qty	Original Amt	Unit Cost	Purchasing UOM	Line Type
532888	576679	559783	572	8.0000	1,539.20	92.0000	17,056.00	100.0000	19,240.00	192.4000	YR	J

4. Change desired fields as necessary on the header.
- Branch/Plant – 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

-  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. Please follow the work instructions for [Revising a Purchasing Document](#) and change the Send Invoice To field on the Order Header and Order Detail screens.

5. Complete the following fields on the Release Information tab:
  - Release Qty – Quantity for Contract will populate – change this quantity. 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.
  - Release Amt – Allow to automatically calculate
6. Complete the following field on the Detail Information tab:
  - Account Number - change to a valid Account Number for your agency
7. Click the Dates tab. Complete the following information on the Dates tab:
  - Requested – date to receive order
  - Promised Delivery – date the vendor can meet
-  If multiple rows were chosen, the Order Release window refreshes with the next item. Repeat Steps 4-8 for each Inventory Number that you wish to include on the Service Contract.
8. Click **OK**.
-  If you want to review the contract before it is generated, continue to the next step, otherwise skip to Step 13.
9. Click **Form, Review Order**. The Gen PO (O9 or Z8) from Service Contract (O4) - Suppliers Selected window appears.



10. Choose the order(s) to review prior to generation.
11. Click **Row, Details**. The Gen PO (O9 or Z8) from Service Contract (O4) - Items Selected for Order window appears.



12. Click **Cancel**.
13. Click **Form, Generate Order**. The Gen PO (O9 or Z8) from Service Contract (O4) Generated Purchase Orders window appears.

Order Number	Or Ty	Order Co	Branch/Plant	Supplier	Request Date
48325	09	56510	65050005	532838	03/03/2008

The new Order Number and Or Ty (Order Type) will appear and should be recorded for future use.

14. The newly generated purchase order will need to be revised to update the Send Invoice To field and remove the Cancel Date. To make these revisions click **Row, Open Order Inquiry**. The Work with Order Details window appears.

Order Number	Quantity To Receive	UM	Amount To Receive	Ship To	Or Ty	Order Fd	Change Order	Supplier Number	Supplier Name
112773	1.0000	M	38.60	557768	OG	56512	000	507000	AMERICAN MINORITY BUSINESS F

15. Choose the document and click **Row, Header Revision**. The Order Header window appears.

Order Number	112773	OG	56512	Business Unit	65050008
<b>Address Numbers</b>			<b>Dates</b>		
Supplier	507000	AMERICAN MINORITY BUSINESS FOR		Order Date	03/23/2007
Ship to	557768	DAS MATERIEL - STATE PRINT SHO		Requested	03/23/2007
Buyer	1117504	JOE, Of		Promised Delivery	03/23/2007
Send Invoice To	250011	DAS MATERIEL		Cancel Date	06/15/2008
Pmt Remark	CA-5990A				
Description	Pressure Seal Forms				
Print Message					
Tax Expt Code		Hold Code	BLANK - HOLD CODES 40HC		
Tax Rate/Area		Approval Code	1117504		
Certificate		Retainage %			
Tax ID	411725178	Ordered By	NISMILLER		
Person/Corp. ID	C	Order Taken By			
Payment Terms		AIA Document	Y		
<b>Messages</b>					

16. Update the following fields:

- **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.
- **Cancel Date** - remove the cancel date.

17. Click **Form, Header to Detail, Populate**.
18. Click **OK**. The Order Detail window appears.
19. Click **OK** to return to the Work with Order Details window.
20. Click **Close** to return to the Generated Purchase Orders window.
21. Click **Close** to return to the Work with Order Release window.
22. Click **Close** to return to the menu.