

Quick Reference Guide: Creating a DO from MA with Catalog Line

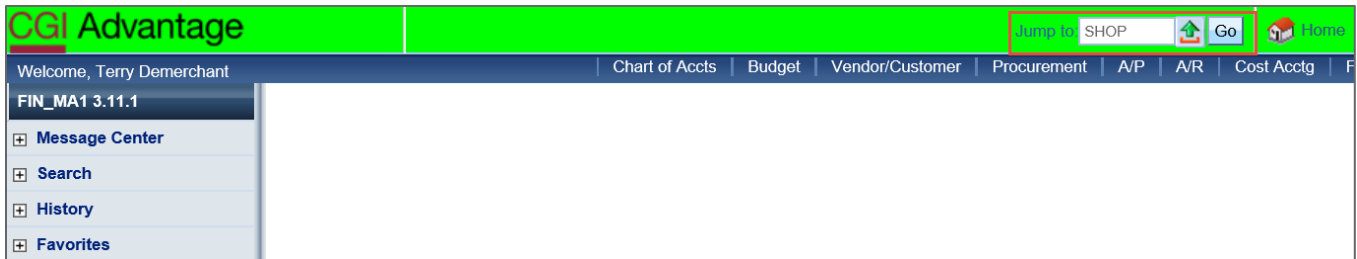
Revised 10/15/2019

PURPOSE

The purpose of this quick reference guide is to illustrate the steps in the Advantage system for creating a delivery order (DO) from a master agreement (MA) with catalog line items. Examples include: business cards, clothing, vehicles, etc.

STEPS FOR CREATING A DO (FROM MA WITH CATALOG LINE)

1. Log into Advantage. In the **Jump To** field, enter **SHOP** and click **Go**.



2. On the Shopper page, under the **Check Sources of Supply** column, uncheck all except MA Catalog items and Master Agreements. Then enter your search criteria in the **Search For** field by entering either a key word, commodity code, or vendor name; and click **Search**.

Shopper

0 Items : \$0.00

Check Sources of Supply :

☐ Select All or check Sources to be searched:

☐ Inventory

☒ MA Catalog Items

☒ Master Agreements

☐ Similar Purchases

☐ Commodities

Search For : BUSINESS CARDS

Advanced Search:

Department : Warehouse :

Commodity : Expiration Date :

Vendor : Include Expired Agreements : No

Part Number : Mandatory Source Enabled :

Price (from) : Include Substitute Stock Items :

Price (to) : Document Description :

Search Clear Search Fields

3. In the results, enter a **Quantity** in the commodity line(s) that you want to place an order against.

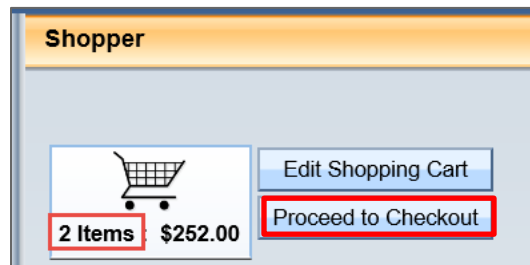
| Available From MA Catalogs | | | | | | | | | | | | |
|----------------------------|-----------|------------------|----------|------|------------|----------------|--|------------------------|----------------------|------------------------------------|---|----------------------------|
| Vend Line | Comm Line | Mandatory Source | Quantity | Unit | Unit Price | Commodity Code | CL Description | Description | Supplier Part Number | Vendor | Document Description | Source |
| 1 | 1 | No | 5 | LOT | \$27.00 | 96607 | Business Cards Gold Seal 250 One Side Blue Ink | Business Cards Printed | MBC2501 | Envelopes & Printed Products, Inc. | Master Agreement for Gold Seal Business Cards | MA 18P 1803300000000000114 |
| 1 | 1 | No | 3 | LOT | \$39.00 | 96607 | Business Cards Gold Seal 500 One Side Blue Ink | Business Cards Printed | MBC2502 | Envelopes & Printed Products, Inc. | Master Agreement for Gold Seal Business Cards | MA 18P 1803300000000000114 |

4. Once you have selected all the commodity lines that you want to order from, scroll to the bottom

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of the page and click **Add to Cart**. The page will refresh, and the cart will show the amount added. (Note that it will reflect how many lines you selected and not the total quantity.) Then click **Proceed to Checkout**.



5. On the Checkout screen, verify the **Document Code** and **Document Department** defaulted are correct. Enter your workflow for your Department Number in the **Unit** field. Leave **Auto Numbering** checked. Under **Additional Information**, enter your shipping and billing location codes. Then click **Checkout**.

The screenshot shows a web interface titled "Checkout". It features a shopping cart icon with the text "2 Items : \$252.00" below it. Below the cart icon is a button labeled "Edit Shopping Cart". The main form area is divided into two sections: "Document Identifier" and "Additional Information". The "Document Identifier" section contains fields for "Code" (set to "DO"), "Department" (set to "18P"), "Unit" (set to "WF07"), and "Auto Numbering" (checked). The "Additional Information" section contains fields for "Shipping Location" (set to "18P01"), "Billing Location" (set to "18P02"), "Accounting Template", "Accounting Profile", "Delivery Date", "PCard ID", "PCard Expiration Date", and "Group Purchases By" (set to "Group All PO Commodities Together"). At the bottom of the form are two buttons: "Continue Shopping" and "Checkout". The "Checkout" button is highlighted with a red rectangular box.

6. A pop-up box will display asking "Do you want to Checkout?" Click **OK**.

The screenshot shows the same "Checkout" screen as before, but with a pop-up dialog box in the foreground. The dialog box is titled "Message from webpage" and contains a question mark icon followed by the text "Do you want to Checkout?". At the bottom of the dialog box are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular box.

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- The DO document is now created and will open on the Header section. From this screen, enter the **Document Description**. If the DO is a confirmation order, check the **Confirmation Order** box located on the right-hand side of the page.

The screenshot shows the 'Header' section of a procurement system. The 'General Information' tab is active. The 'Document Description' field is highlighted with a red box and contains the text 'Business cards for Daisy Duck and Minnie Mouse'. The 'Confirmation Order' checkbox is checked and highlighted with a red box. Other fields include Document Name, Record Date, Budget FY, Fiscal Year, Period, PCard ID, PCard Exp, Card Number, Cardholder Name, Accounting Profile, Procurement Folder, Procurement Type (Delivery Order), Procurement Type ID (2), Cited Authority, Closed Amount (\$0.00), Closed Date, Supplier Received Date, Open Amount (\$252.00), Total of Header Attachments (0), Total of All Attachments (0), and Open Accrual Amount (\$0.00).

- Select the **Requestor Issuer Buyer** tab and enter the **Requestor ID**; then click **Save** to bring in all the information for the Requester.

The screenshot shows the 'Requestor Issuer Buyer' tab selected. The 'Requestor ID' field is highlighted with a red box and contains the text 'Idemerchant'. The 'Buyer Team' section includes fields for Buyer, Award Officer Name, Award Officer Phone Number, Award Officer Phone Extension, and Award Officer Email. The 'Save' button is highlighted with a red box. Other fields include Issuer ID (Idemerchant), Terry Demerchant, 207-624-7334, TERRY.L.DEMERCHANT@MAINE.GOV, Name (Terry Demerchant), Email (TERRY.L.DEMERCHAN), and Phone Number (207-624-7334).

- Click on **Commodity** from the Document Navigator.

The screenshot shows the 'Document Navigator' menu. The 'Commodity' option is highlighted in yellow. Other options include Header, Accounting Distribution, Vendor, Accounting, Posting, and Special Instructions.

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10. Verify that the information displayed reads correctly

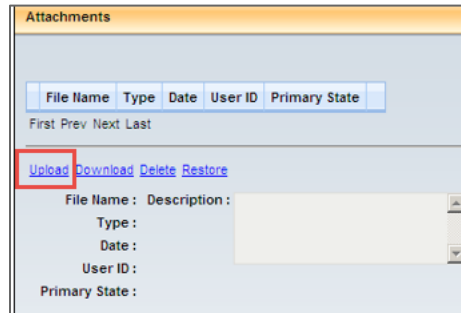
The screenshot shows the CGI Advantage web application interface. The top navigation bar includes links for Chart of Accts, Budget, Vendor/Customer, Procurement, A/P, A/R, Cost Acclg, Fixed Assets, Cash Receipts, and Treasury. The main header area displays 'Delivery Order (DO)' with fields for Dept (18P), ID (20190624000000001714), Ver (1), Function (New), Phase (Draft), and Modified by (ldemarchant, 09/24/2019). The left sidebar contains a 'Document Navigator' with links for Header, Accounting Distribution, Vendor, Commodity, Accounting, Posting, and Special Instructions. The 'Header' tab is selected, showing 'General Information' and 'Contract Details'. The 'General Information' tab is active, displaying fields for Document Name, Record Date, Budget FY, Fiscal Year, Period, Document Description, PCard ID, PCard Exp, Card Number, Cardholder Name, Accounting Profile, Procurement Folder, Procurement Type (Delivery Order), and Procurement Type ID. Below the header, a table shows the 'Accounting Distribution' with columns for Total Lines, Line, Distribution %, Vendor, Commodity, Accounting, Posting, and Special Instructions. The table data includes: Vendor Customer: VS0000017169, Legal Name: Envelopes & Printed Products, Inc., Commodity: 96607, Open Amount: \$0.00, Line Amount: \$135.00, and Special Instructions Code: none.

ATTACHING DOCUMENTS

11. To attach documents to a DO, such as the business card information: From the **General Information** tab, click **File**, then **Attachments**.

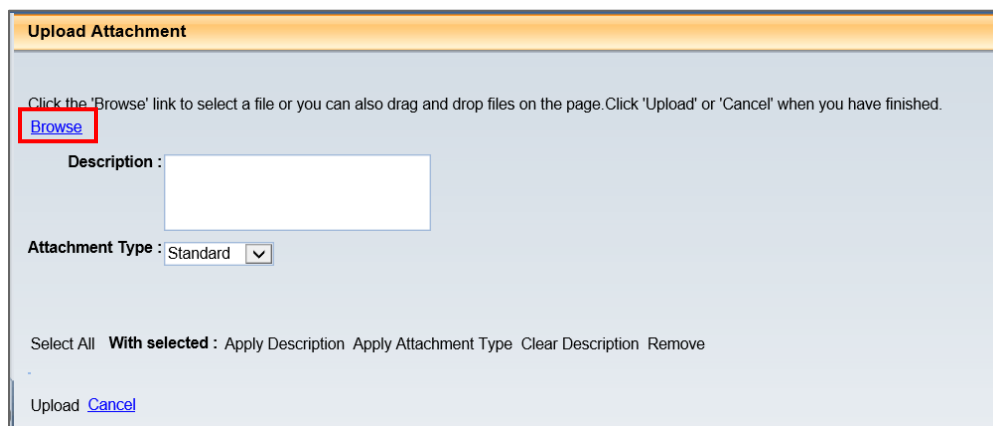
The screenshot shows the 'Commodity' line item details in the CGI Advantage web application. The top navigation bar includes links for General Information, Reference, Shipping/Billing, Fixed Asset Intent Reference, Specifications, Matching, Retainage, Tolerance, and Discount. The 'General Information' tab is selected, displaying fields for CL Description (2018-2019 Heating Fuel- #2 & ULS Diesel), Warehouse, Commodity (40512), Fuel Oil, Heating (Use 405-02 for Biodiesel), Stock Item Suffix, Supplier Part Number, Line Type (Service), Quantity (0.00000), Unit, Unit Price (\$0.00), Discounted Unit Price (\$0.00), List Price (\$0.00), External Warehouse, Fixed Asset, Lock Order Specs, Lock Catalog List Price, Allow Promotional Pricing, Vendor Preference Level (99), Inactive Line, Shipping Charge, Commodity Specs (Fixed price thru 9/30/2019: #2 = \$2.5020 per gal, Diesel thru 4/30/2019- \$2.5571 per gal. See contracts for margin pricing if), and Extended Description (As per the specifications attached and made part of this MA. Please attach invoices to Delivery Orders). The bottom of the screen shows a toolbar with buttons for Save, Undo, Insert New Line, Insert Copied Line, Edit with Grid, Copy, Validate, Submit, Discard, View PDF, Print, Processing, Workflow, File, and Close. The 'File' button is highlighted, and a dropdown menu is visible with options for Archive, Send Pdf, Download, Attachments, and Attachments.

12. Click **Upload**.

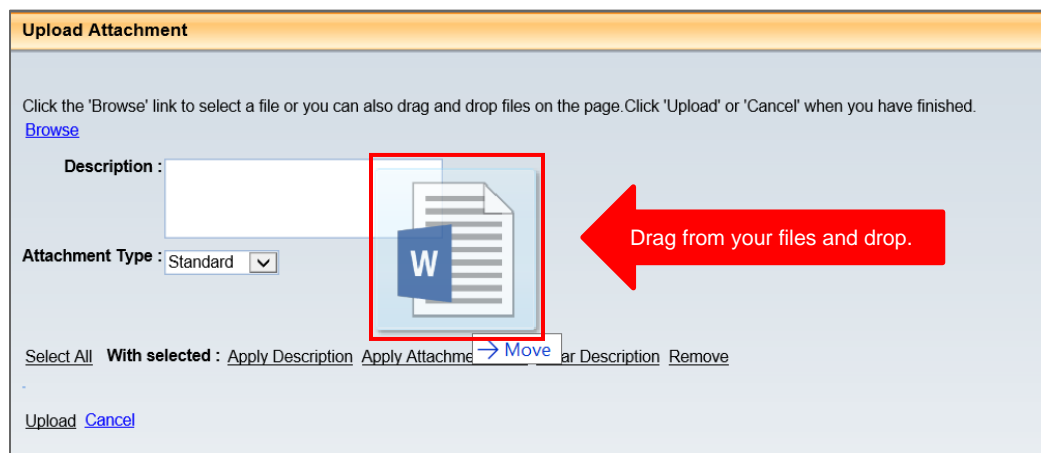


The screenshot shows a web interface titled "Attachments". At the top, there is a table with columns: File Name, Type, Date, User ID, and Primary State. Below the table are navigation links: First, Prev, Next, Last. Below these are four buttons: Upload, Download, Delete, and Restore. The Upload button is highlighted with a red box. Below the buttons are input fields for File Name, Description, Type, Date, User ID, and Primary State.

13. Click **Browse** to attach the file(s); or click and drag/drop your files (see second screenshot).
NOTE: Dragging/dropping files will allow you to select multiple files at once.



The screenshot shows a web interface titled "Upload Attachment". It contains a text box for Description and a dropdown menu for Attachment Type (Standard). Below these are buttons: Select All, With selected, Apply Description, Apply Attachment Type, Clear Description, and Remove. At the bottom are buttons: Upload and Cancel. The Browse button is highlighted with a red box.



The screenshot shows the same "Upload Attachment" interface as the previous one. A red box highlights a Microsoft Word document icon. A red arrow points from the icon to the right, with the text "Drag from your files and drop." inside it. The interface also shows the Description field, Attachment Type dropdown, and various action buttons at the bottom.

14. After you have attached all your files through either method, the selected documents will show in a list and you can enter a **Description** for each attachment.

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Upload Attachment

Click the 'Browse' link to select a file or you can also drag and drop files on the page. Click 'Upload' or 'Cancel' when you have finished.
[Browse](#)

Description :

Attachment Type : Standard

[Select All](#) With selected : [Apply Description](#) [Apply Attachment Type](#) [Clear Description](#) [Remove](#)

| | File Name | Description | Attachment Type |
|--------------------------|----------------------|------------------------|-----------------------|
| <input type="checkbox"/> | test document 1.docx | Attachment Description | Standard |

Total Number of Files selected: 1
[Upload](#) [Cancel](#)

15. Once all desired files have been added, check the boxes next to each file name and select **Upload**.

[Select All](#) With selected : [Apply Description](#) [Apply Attachment Type](#) [Clear Description](#) [Remove](#)

| | File Name | Description | Attachment Type |
|-------------------------------------|-------------|-------------|-----------------------|
| <input checked="" type="checkbox"/> | invoice.pdf | Invoice | Standard |

Total Number of Files selected: 1
[Upload](#) [Cancel](#)

16. After the upload is complete, click **Done**.

[Select All](#) With selected : [Apply Description](#) [Apply Attachment Type](#) [Clear Description](#) [Remove](#)

| | File Name | Description | Attachment Type | File Size |
|--|----------------------------|-------------|-----------------|-----------|
| | invoice.pdf | Invoice | Standard | 325.34 KB |
| | file uploaded successfully | | | |

Total Number of Files selected: 1
Total Files Size: 325.34 KB
[Upload](#) [Done](#)

17. This will take you back to the Attachments page. Click on the **Return to Document** link.

Attachments


| File Name | Type | Date | User ID | Primary State |
|---------------|----------|---------|-------------|---------------|
| ✓ invoice.pdf | Standard | 9/16/19 | tdemERCHANT | New |

First Prev Next Last

[Upload](#)
[Search](#)
[Download](#)
[Delete](#)
[Restore](#)

File Name : invoice.pdf **Description :** Invoice
Type : Standard
Date : 9/16/19
User ID : tdemERCHANT
Primary State : New

[Return to Document](#)
[View Attachment History](#)

18. Notice that a paper clip icon and a number  appear on the header accordion bar. This signifies that there is an attachment associated with this section.



Delivery Order(DO) Dept: 16P ID: 20190913000000001706 Ver.: 1 Function: New Phase: Draft Modified by tdemERCHANT , 09/13/2019

Header

Accounting Distribution Total Lines: 0 Line: none Distribution %: none

Vendor Vendor Customer: VS0000017169 Legal Name: Envelopes & Printed Products, Inc.

Commodity @ 2 Total Lines: 2 Line: 1 Commodity: 96607 Open Amount: \$0.00 Line Amount: \$135.00

| Line | CL Description | Line Amount | Open Amount | Closed Amount | Modified |
|---|------------------------|-------------|-------------|---------------|----------|
|  1 | Business Cards Printed | \$135.00 | \$0.00 | \$0.00 | No |
|  2 | Business Cards Printed | \$117.00 | \$0.00 | \$0.00 | No |

From 1 to 2 Total: 2

First Previous Next Last Show Lines: 10 Go to line: Go Export to CSV

19. Click **Accounting** from the Document Navigator on the left-hand menu.

Document Navigator

- Header
- Accounting Distribution
- Vendor
- Commodity
- Accounting**
- Posting
- Special Instructions

20. Click **Insert New Line**.

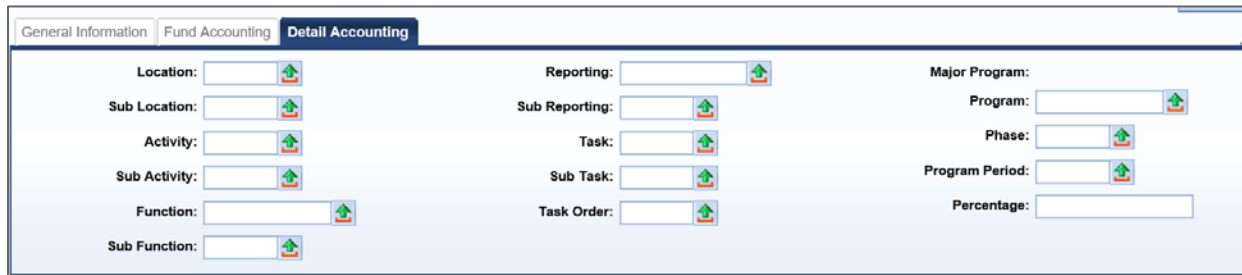
The screenshot shows the 'Accounting' window with 'Total Lines: 0' and 'Line: none'. The 'General Information' tab is active, displaying fields for Event Type, Accounting Template, Line Description, Line Amount, Reserved Funding, Line Closed Amount, Line Closed Date, and Line Open Amount. At the bottom, the 'Insert New Line' button is highlighted with a red box, alongside 'Insert Copied Line' and 'Edit with Grid' buttons.

21. Enter your account codes:

- Fund
- Department
- Unit
- Sub Unit
- Object (or BSA – Fleet, Ferry, STAR and Facilities ONLY)

The screenshot shows the 'Accounting' window with 'Total Lines: 1' and 'Line: 0'. The 'Fund Accounting' tab is active, displaying fields for Fund (010), Sub Fund, Department (18P), Unit (1200), Sub Unit (01), Appr Unit, Object (5650), Sub Object, Revenue, Sub Revenue, BSA, and Sub BSA. Each field has a green up arrow icon next to it.

22. Optional: If you have detailed accounting that you want to use, you can enter it on the **Detail Accounting** tab.

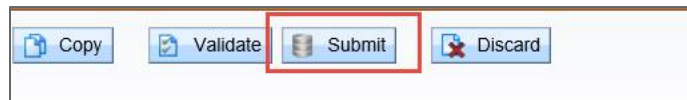


23. Save, validate and check for errors.



SUBMITTING THE DO

24. Once all the above steps are complete and any errors have been resolved, click **Submit**.



NOTE: The top of the page will say "Document submitted successfully" and the submitted delivery order will show as **Pending**.

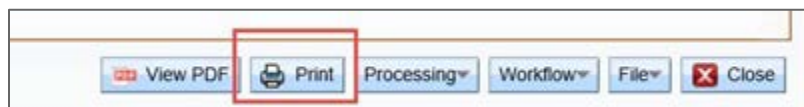


25. If the DO is \$5,000 or less, you will need to monitor the status until it is approved and updated to Final.



26. Once the document is Final, you must email it to the vendor (unless it is a confirmation order). To do this:

- Click **Print** in the lower right-hand corner of the document.



- On the **Print Output Type** field, select **E-Mail**.
- On the **Print Job** field, select **Email DO to Vendor**.

- d. Click **Print** on the bottom left.

Print

Print Output Type: E-MAIL
Print Job: Email DO to Vendor
Print Resource: Email

Hide Inactive Procurement Lines: ☐

Email Address: TERRY.L.DEMERCHANT@MAINE.GOV,TERRY.L.DEMERCHANT@MAINE.GOV
Email Subject: State of Maine Delivery Order - DO 18P 2019100100000001719
Email Message: Attached is an order from the State of Maine. Please invoice us at the address enclosed.
Sender's Email: AdvantageME SysAdm@

Print Cancel

27. If the DO is over \$5,000, the document will automatically route to Procurement Services after it is approved by your approver. Procurement Services will then email the document to the vendor and to you (the creator).

VIEW / PRINT PDF

28. After the DO has been approved, you can print the document for your files. Click the **View PDF** button.

Delivery Order(DO) Dept: 18P ID: 2019091300000001703 Ver: 1 Function: New Phase: Final Modified by: Idemerchant, 09/13/2019

Document Navigator: Header, Accounting Distribution, Vendor, Commodity, Accounting, Posting, Special Instructions

Header: General Information, Contract Details, Reference, Requestor Issuer Buyer, Modification, Extended Description, Default Shipping/Billing, Reporting, Fixed Asset Intent Reference

Document Information

Issuer ID: Idemerchant
Terry Demerchant
207-624-7334
TERRY.L.DEMERCHANT@MAINE.GOV

Requestor ID: Idemerchant
Name: Terry Demerchant
Email: TERRY.L.DEMERCHAN
Phone Number: 207-624-7334
Requesting Dept: 18P

Buyer Team:
Buyer: dcrockett1
Donny Crockett
207-624-7336
Donny.Crockett@maine.gov

Award Officer Name:
Award Officer Phone Number:
Award Officer Phone Extension:
Award Officer Email:

Related Actions: Edit, Copy, Copy Forward, Discard, **View PDF**, Print, Processing, Workflow, File, Close

29. Advantage will generate a PDF of the order as shown below. Click **View PDF** again and print.

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1 of 1 | [View PDF](#) PDF file is retrieved from the print server.

View Forms

[Browse](#) [Clear](#) [Refresh](#)

Doc Code :

Doc Dept :

Document ID : 20190913000000001703

Description :

| Status | Description | Doc Code | Doc Dept | Document ID | File Name | |
|-----------|-------------|----------|----------|----------------------|---|--------------------------|
| ✓ Pending | | DO | 18P | 20190913000000001703 | tdemerchant_3852966_DO_18P_20190913000000001703_1 | View PDF |

First Prev Next Last

ADDITIONAL RESOURCES

- Advantage 302 Procurement Commodities Training Guide

Questions? Contact [Terry Demerchant](#) in the Division of Procurement Services.