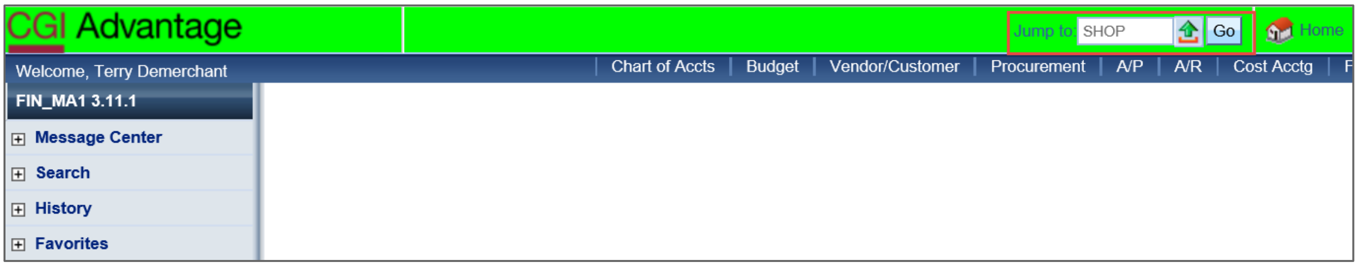
## PURPOSE

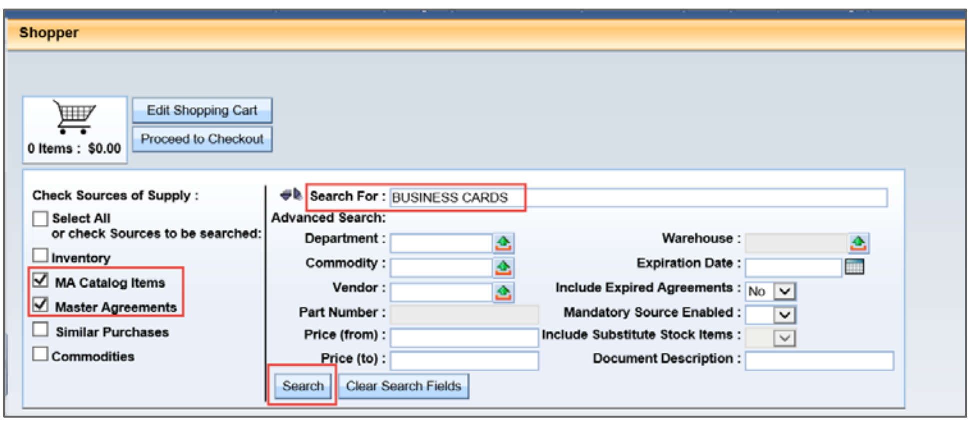
The purpose of this quick reference guide is to illustrate the steps in the Advantage system for creating a delivery order (DO) from a master agreement (MA) with catalog line items. Examples include: business cards, clothing, vehicles, etc.

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

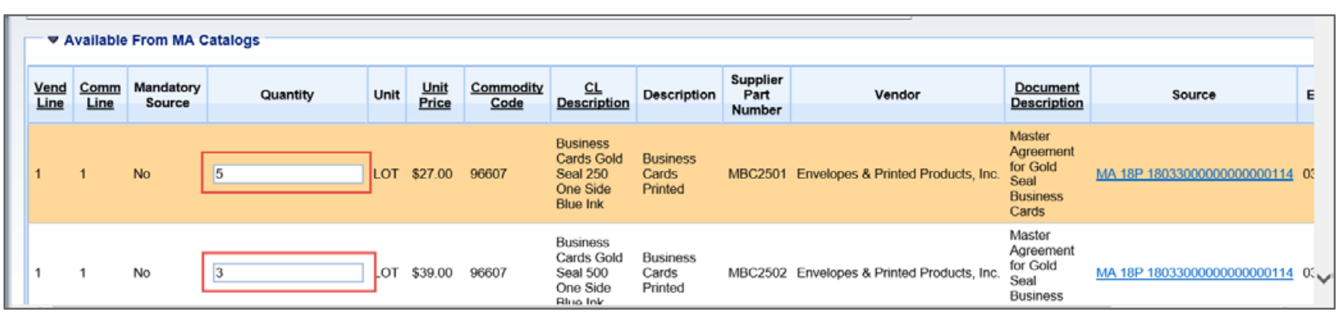
1. Log into Advantage. In the **Jump To** field, enter **SHOP** and click **Go**.




2. On the Shopper page, under the **Check Sources of Supply** column, <u>un</u>check all <u>except</u> 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**.

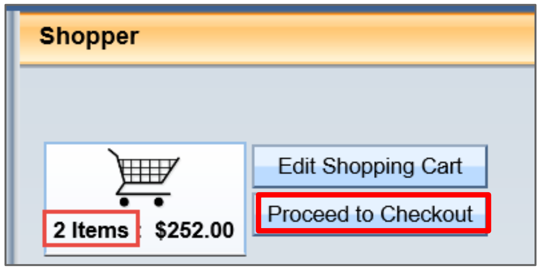



3. In the results, enter a **Quantity** in the commodity line(s) that you want to place an order against.

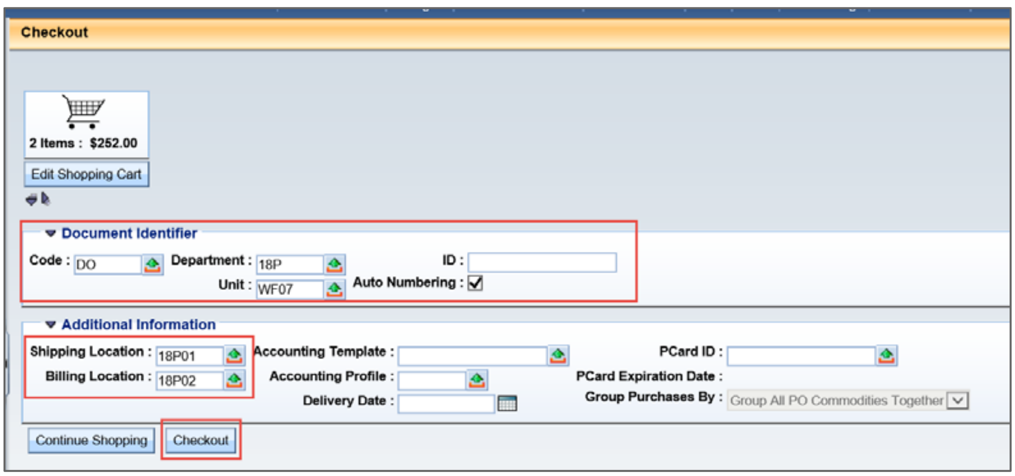



4. Once you have selected all the commodity lines that you want to order from, scroll to the bottom

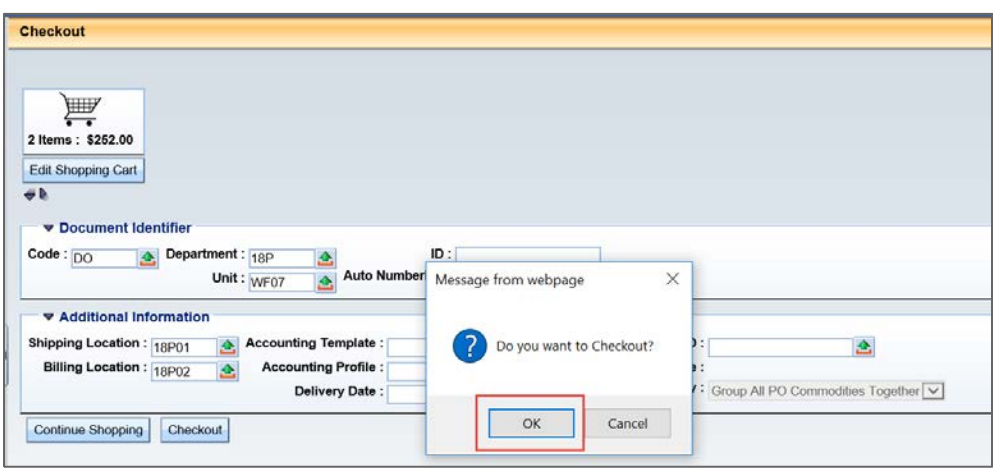
of the page and click **Add to Cart**. The page will refresh, and the cart will show the amount added. (Note that it will reflect how many lines you selected and not the total quantity.) Then click **Proceed to Checkout.**



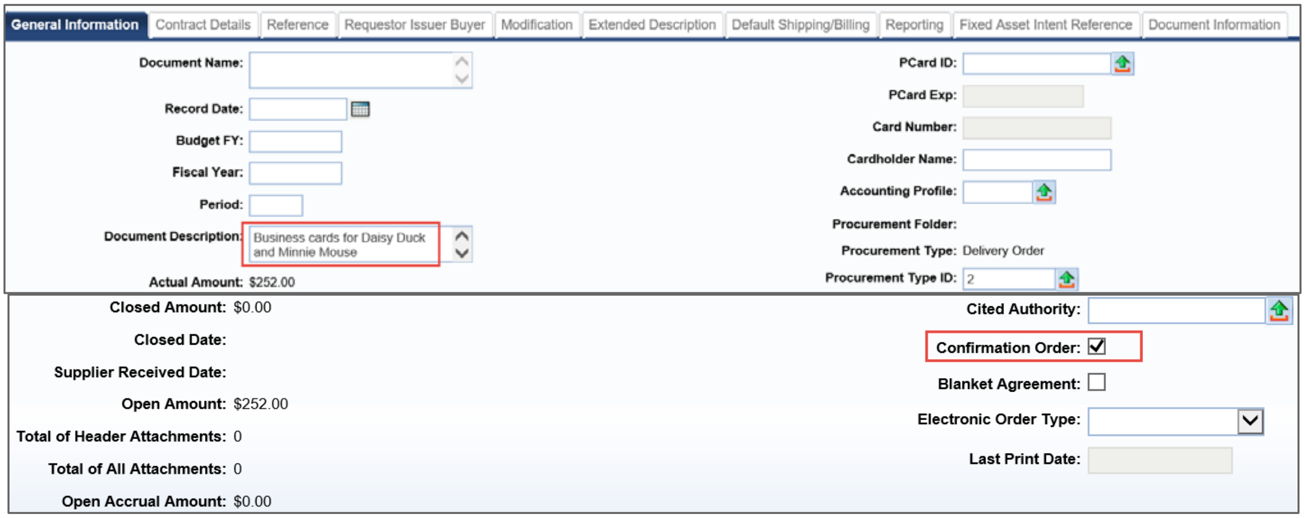

5. On the Checkout screen, verify the **Document Code** and **Document Department** defaulted are correct. Enter your workflow for your Department Number in the **Unit** field. Leave **Auto Numbering** checked. Under **Additional Information**, enter your shipping and billing location codes. Then click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



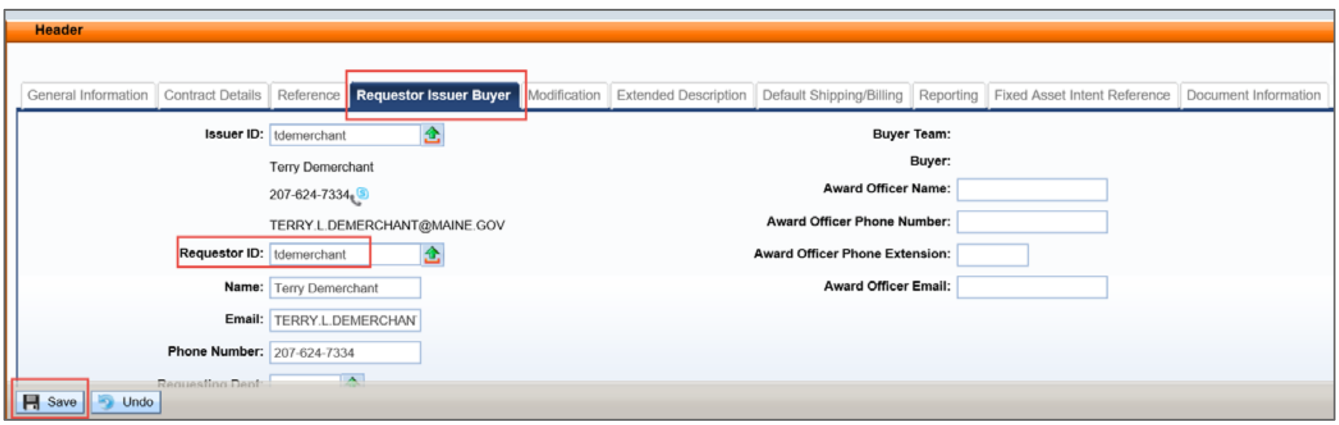

6. A pop-up box will display asking “Do you want to Checkout?” Click **OK**.



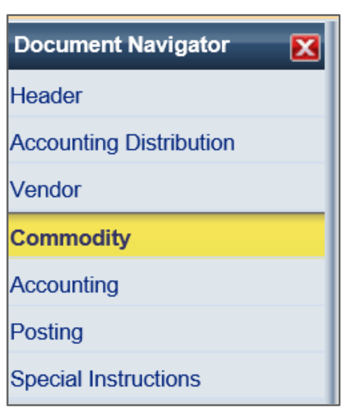
7. The DO document is now created and will open on the Header section. From this screen, enter the **Document Description**. If the DO is a confirmation order, check the **Confirmation Order** box located on the right-hand side of the page.



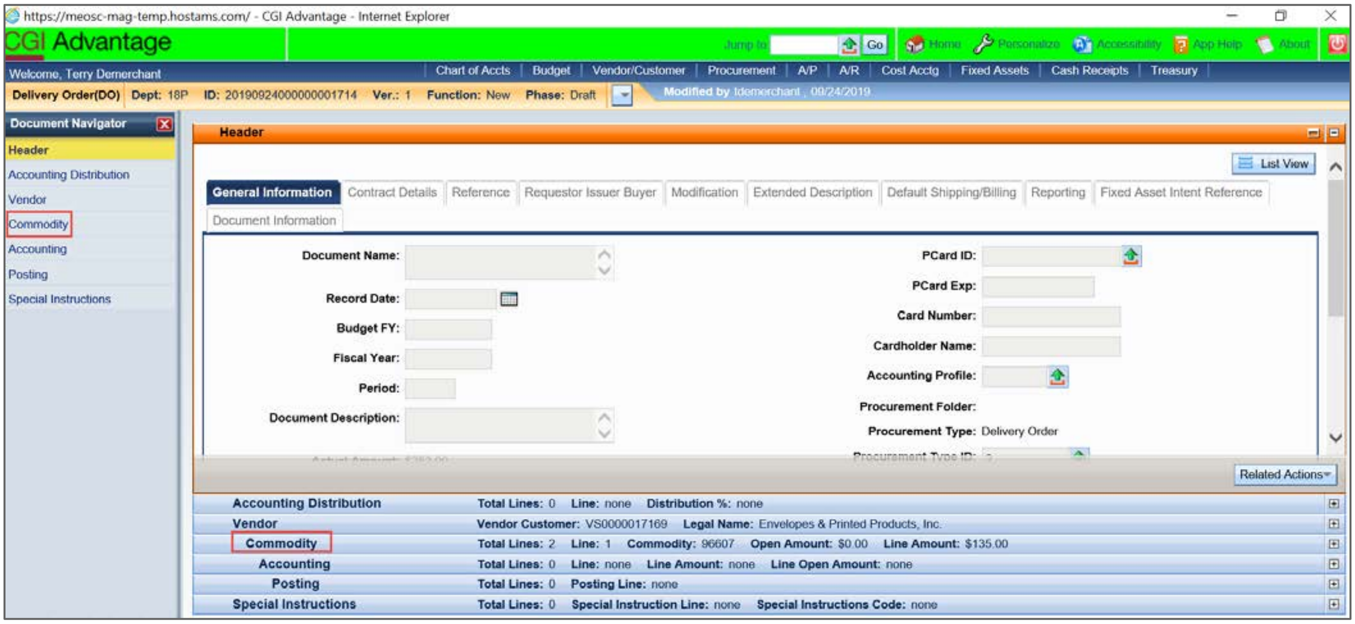

8. Select the **Requestor Issuer Buyer** tab and enter the **Requestor ID**; then click **Save** to bring in all the information for the Requester.




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

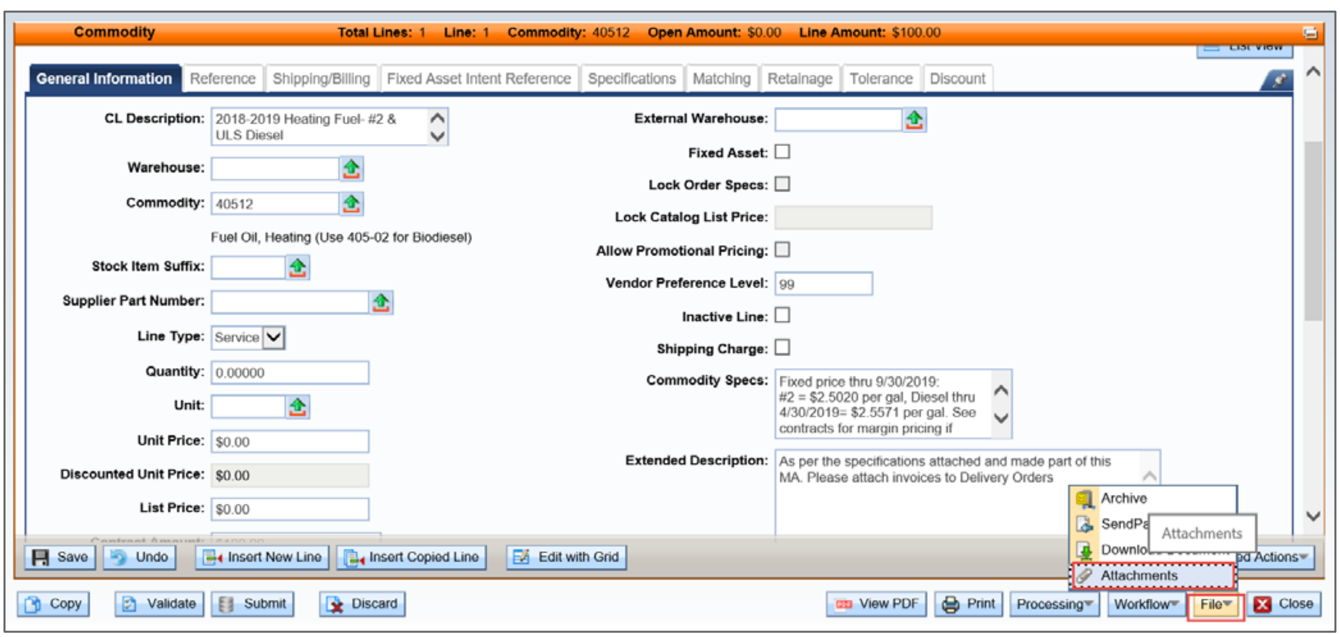


10. Verify that the information displayed reads correctly

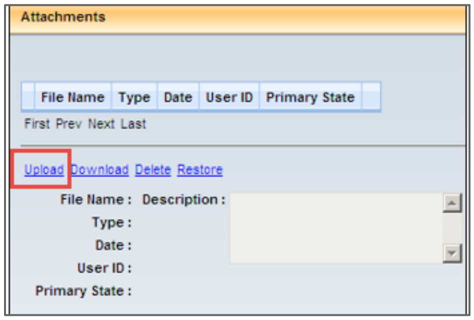



## ATTACHING DOCUMENTS

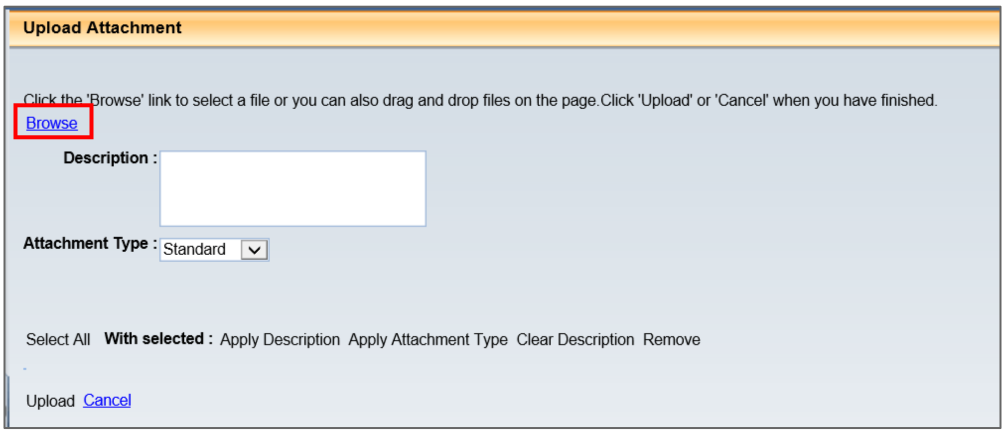
11. To attach documents to a DO, such as the business card information: From the **General Information** tab, click **File**, then **Attachments**.

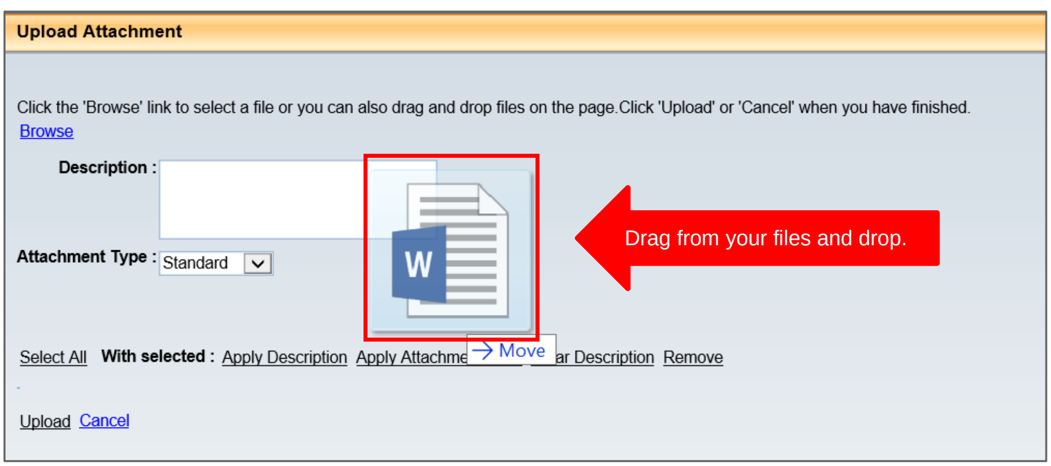


12. Click **Upload**.

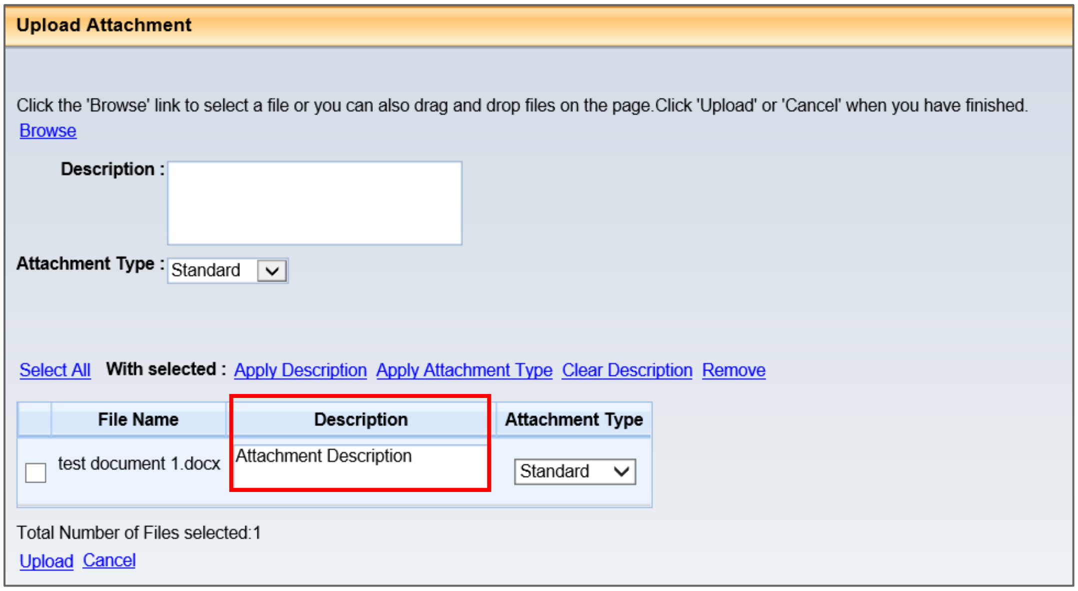



13. Click **Browse** to attach the file(s); or click and drag/drop your files (see second screenshot). NOTE: Dragging/dropping files will allow you to select multiple files at once.

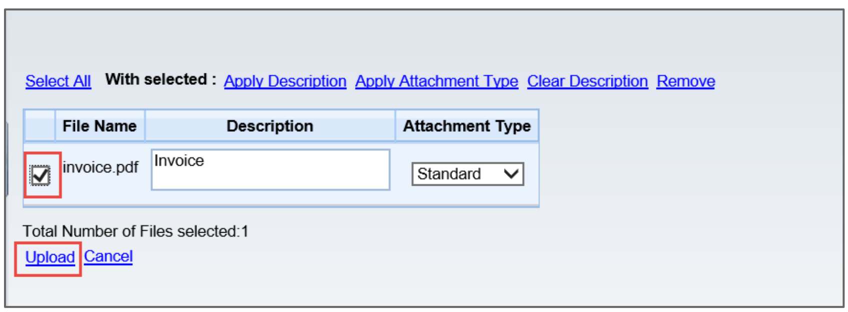



14. After you have attached all your files through either method, the selected documents will show in a list and you can enter a **Description** for each attachment.

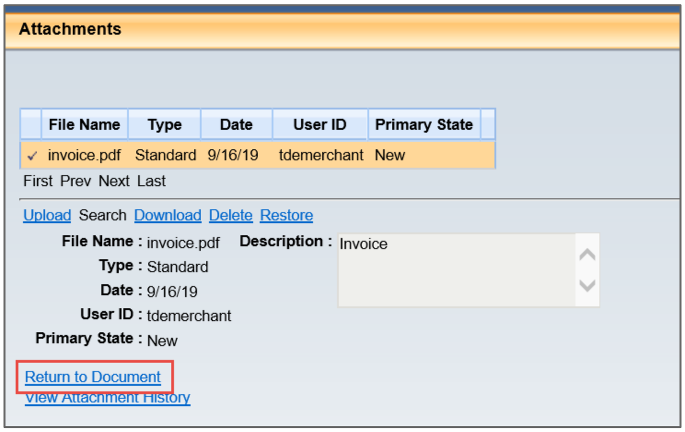



15. Once all desired files have been added, check the boxes next to each file name and select **Upload.**

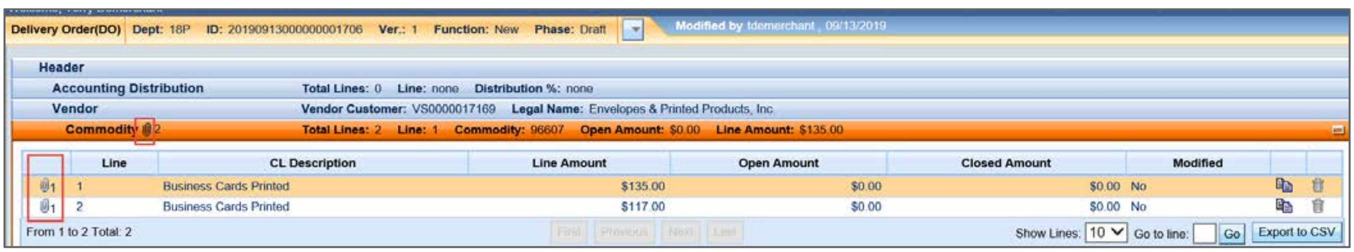



16. After the upload is complete, click **Done**.


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

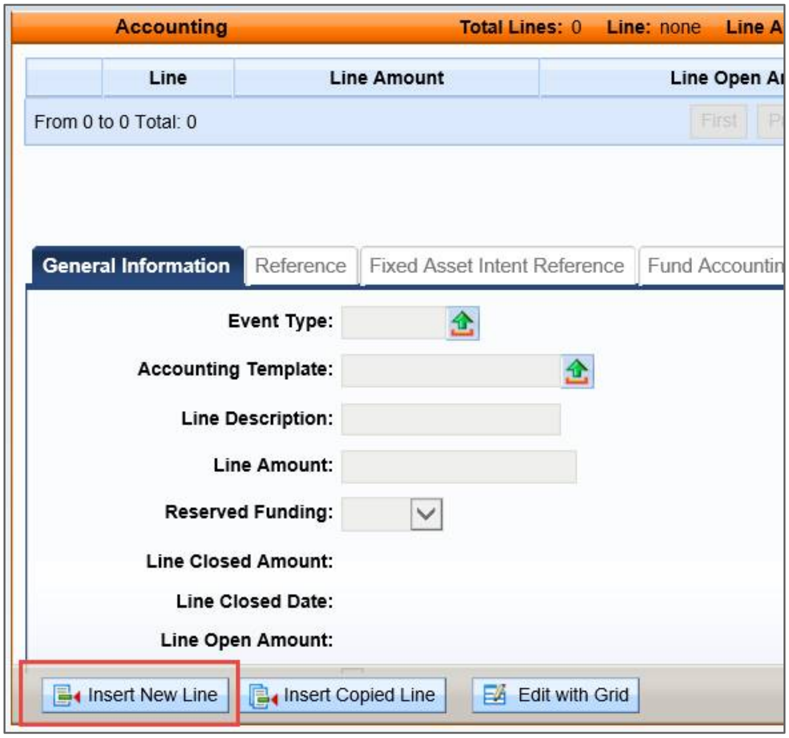



18. Notice that a paper clip icon and a number appear on the header accordion bar. This signifies that there is an attachment associated with this section.



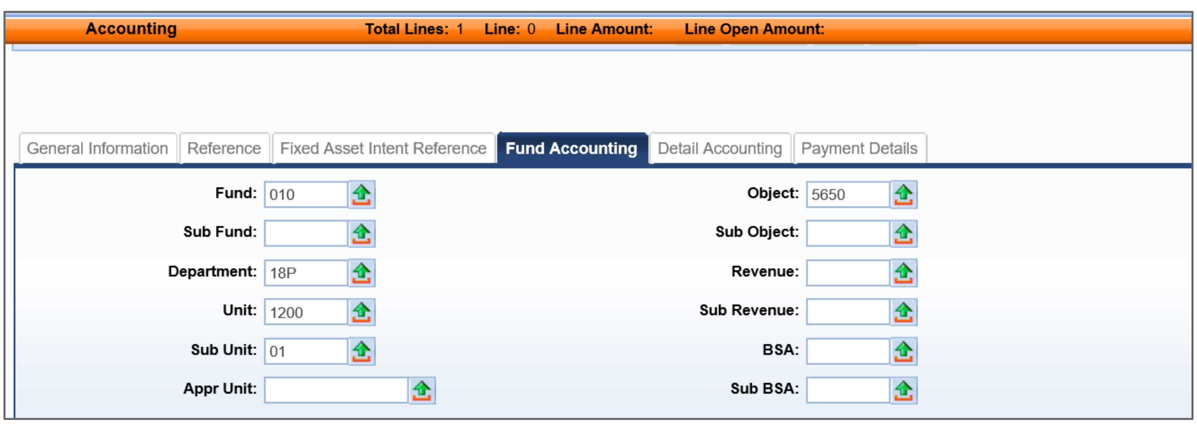

19. Click **Accounting** from the Document Navigator on the left-hand menu.

20. Click **Insert New Line.**

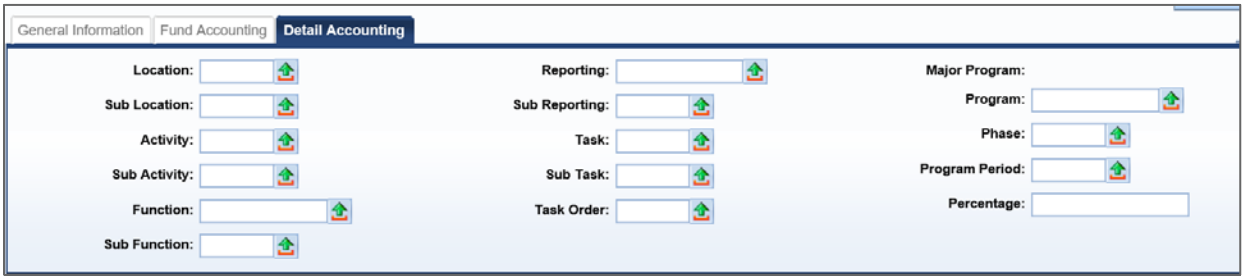



21. Enter your account codes:

   a. Fund
   b. Department
   c. Unit
   d. Sub Unit
   e. Object (or BSA – Fleet, Ferry, STAR and Facilities ONLY)




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

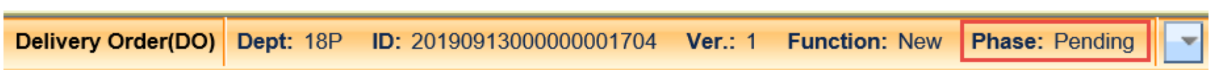



23. Save, validate and check for errors.


## SUBMITTING THE DO

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

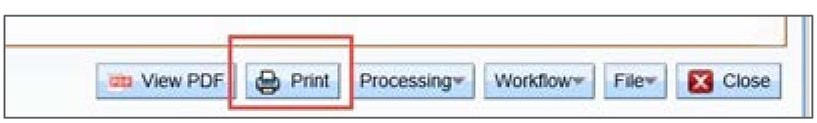

NOTE: The top of the page will say "Document submitted successfully" and the submitted delivery order will show as **Pending**.




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:

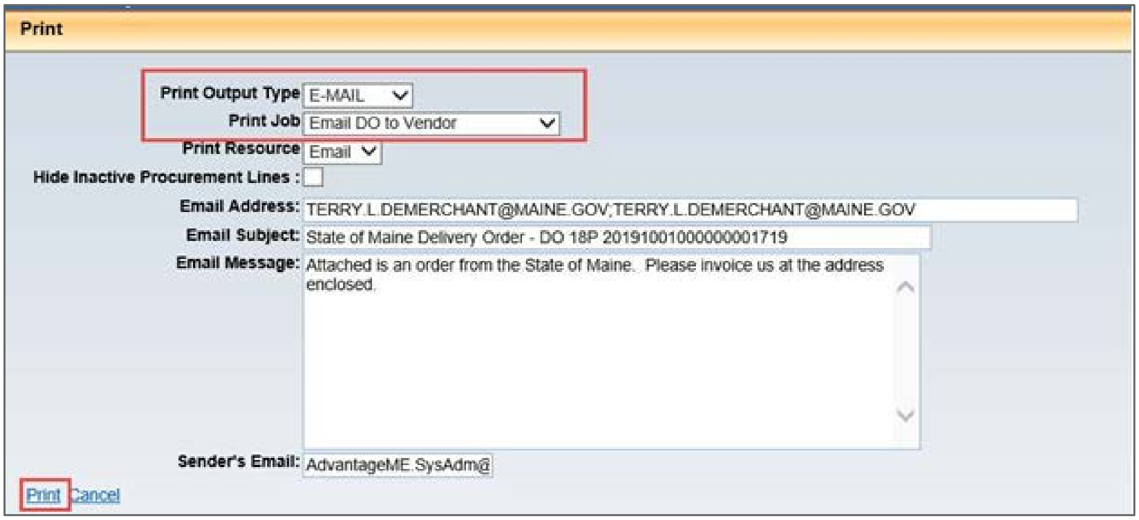
    a. Click **Print** in the lower right-hand corner of the document.




    b. On the **Print Output Type** field, select **E-Mail**.

    c. On the **Print Job field**, select **Email DO to Vendor**.

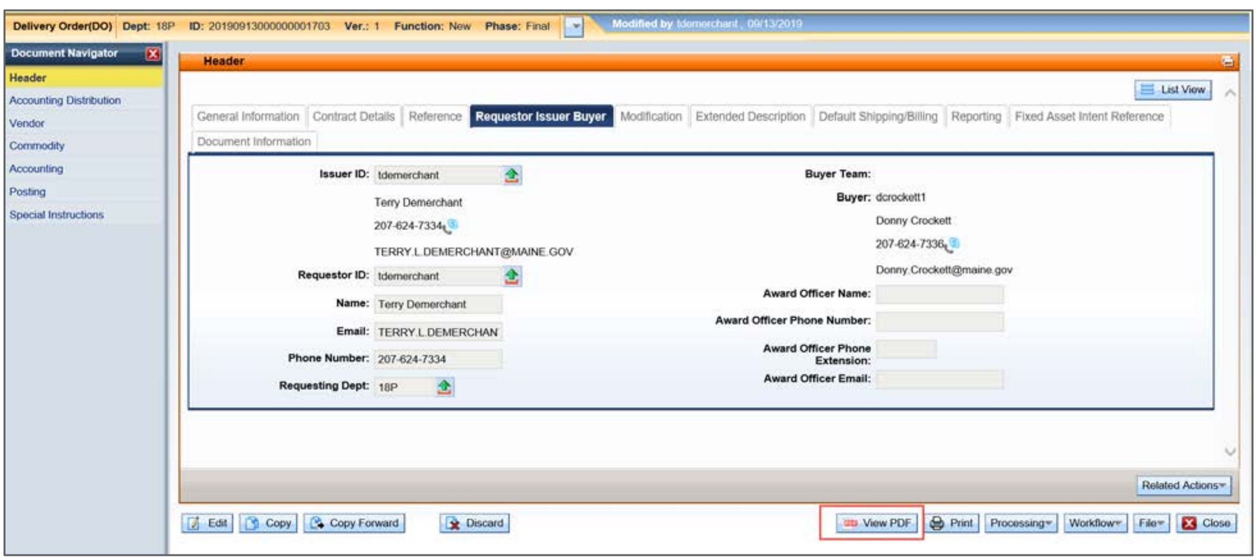
d. Click **Print** on the bottom left.



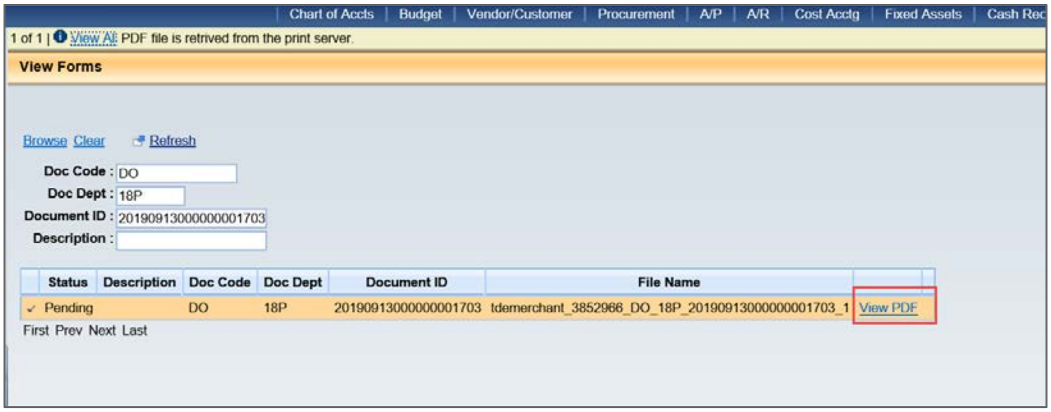

27. If the DO is over $5,000, the document will automatically route to Procurement Services after it is approved by your approver. Procurement Services will then email the document to the vendor and to you (the creator).

## VIEW / PRINT PDF

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




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




## ADDITIONAL RESOURCES

- Advantage 302 Procurement Commodities Training Guide

***Questions?*** *Contact Terry Demerchant in the Division of Procurement Services.*