

# Quick Reference Guide: Creating a DO from MA with Service 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 a service line, such as in these examples:

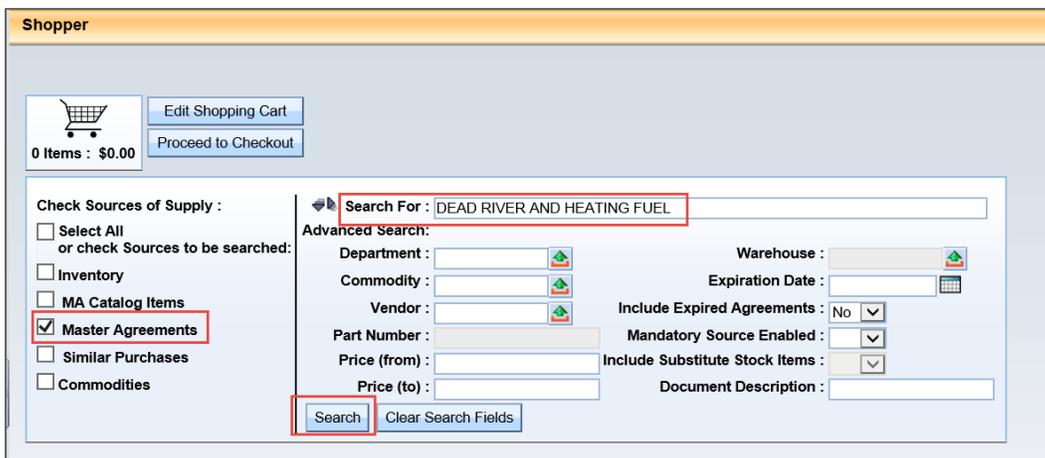
- Paying an invoice, e.g., Dead River heating fuel invoice; or
- Creating an order for knowledge services or a temp contract.

## STEPS FOR CREATING A DO (FROM MA WITH SERVICE 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 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**.



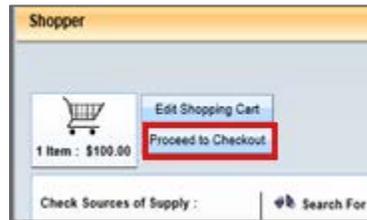
3. In the results, enter the **SC Amount** (i.e., invoice or quote amount).

Vend Line	Comm Line	Mandatory Source	Quantity	SC Amount	Unit	Unit Price	Commodity Code	CL Description	Description	Vendor	Document Description	Source
1	1	No		100.00		\$0.00	40512	2018-2019 Heating Fuel- #2 & ULS Diesel	Fuel Oil Heating (Use 405-02 for ...)	DEAD RIVER CO	2018-2019 Heating Fuel- #2 & ULS Diesel	MA 18P 1810250000000000

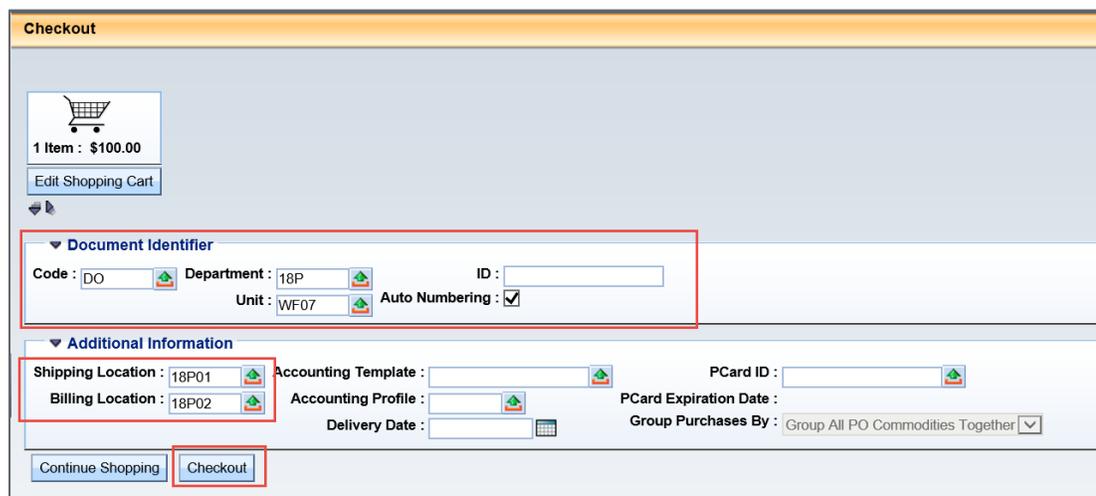
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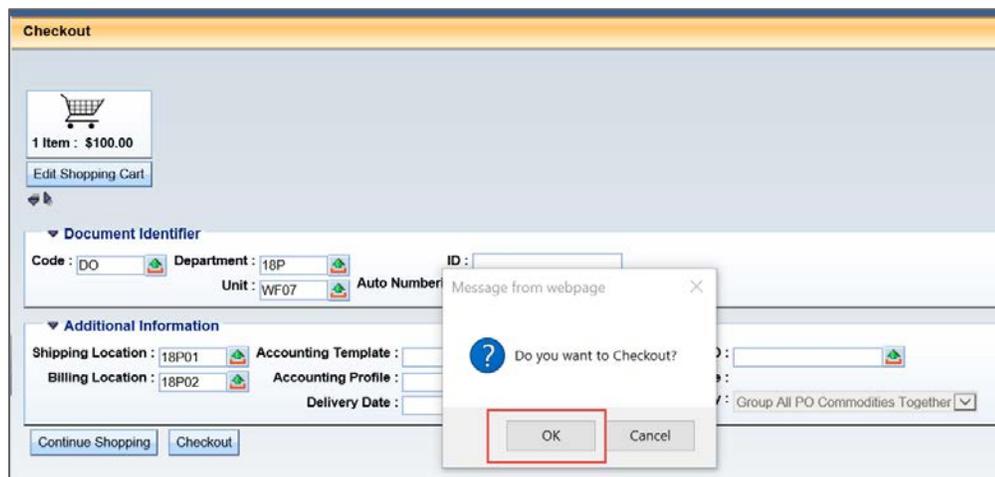
- Once the amount has been entered, click **Add to Cart**. The page will refresh, and the cart will show the amount added. Then click **Proceed to Checkout**.



- 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**.

A screenshot of a web application window titled "Checkout". It shows a shopping cart icon and the text "1 Item : \$100.00". There are two buttons: "Edit Shopping Cart" and "Proceed to Checkout". The "Proceed to Checkout" button is highlighted with a red rectangular box. Below the cart information, there are sections for "Document Identifier" and "Additional Information". The "Document Identifier" section has fields for "Code" (DO), "Department" (18P), "Unit" (WF07), and "Auto Numbering" (checked). The "Additional Information" section has fields for "Shipping Location" (18P01), "Billing Location" (18P02), "Accounting Template", "Accounting Profile", "Delivery Date", "PCard ID", "PCard Expiration Date", and "Group Purchases By" (Group All PO Commodities Together). At the bottom, there are two buttons: "Continue Shopping" and "Checkout".

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



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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.

Header

General Information | Contract Details | Reference | Requestor Issuer Buyer | Modification | Extended Description | Default Shipping/Billing | Reporting | Fixed Asset Intent Reference | Document Information

Document Name: [ ] PCard ID: [ ]  
Record Date: [ ] PCard Exp: [ ]  
Budget FY: [ ] Card Number: [ ]  
Fiscal Year: [ ] Cardholder Name: [ ]  
Period: [ ] Accounting Profile: [ ]  
Document Description: Paying the Dead River Invoice Procurement Folder: [ ]  
Procurement Type: Delivery Order

Actual Amount: \$100.00 Procurement Type ID: 2  
Closed Amount: \$0.00 Cited Authority: [ ]  
Closed Date: [ ] Confirmation Order:   
Supplier Received Date: [ ] Blanket Agreement:   
Open Amount: \$100.00 Electronic Order Type: [ ]  
Total of Header Attachments: 0 Last Print Date: [ ]  
Total of All Attachments: 0

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

Header

General Information | Contract Details | Reference | Requestor Issuer Buyer | Modification | Extended Description | Default Shipping/Billing | Reporting | Fixed Asset Intent Reference | Document Information

Issuer ID: ldemerchant  
Terry Demerchant  
207-624-7334  
TERRY.L.DEMERCHANT@MAINE.GOV  
Requestor ID: ldemerchant  
Name: Terry Demerchant  
Email: TERRY.L.DEMERCHAN  
Phone Number: 207-624-7334

Buyer Team:  
Buyer:  
Award Officer Name: [ ]  
Award Officer Phone Number: [ ]  
Award Officer Phone Extension: [ ]  
Award Officer Email: [ ]

Save Undo

- Click on **Commodity** from the Document Navigator menu on the left of the screen.



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10. Enter the **Service Dates**.

Unit:

Unit Price: \$0.00

Discounted Unit Price: \$0.00

List Price: \$0.00

Contract Amount: \$100.00

**Service From:** 09/16/2019

**Service To:** 09/16/2019

Accounting Profile:

Accounting Template:

Tax Profile:

Leased Item:

## ATTACHING DOCUMENTS

11. To attach documents to a DO, such as the receipt/invoice: From the **General Information** tab, click **File**, then **Attachments**.

Commodity Total Lines: 1 Line: 1 Commodity: 40512 Open Amount: \$0.00 Line Amount: \$100.00

General Information Reference Shipping/Billing Fixed Asset Intent Reference Specifications Matching Retainage Tolerance Discount

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

Extended Description: As per the specifications attached and made part of this MA. Please attach invoices to Delivery Orders

File menu: Archive, SendPa, Downlo, Attachments, Attachments

Buttons: Save, Undo, Insert New Line, Insert Copied Line, Edit with Grid, Copy, Validate, Submit, Discard, View PDF, Print, Processing, Workflow, File, Close

12. Click **Upload**.

Attachments

File Name	Type	Date	User ID	Primary State
-----------	------	------	---------	---------------

First Prev Next Last

**Upload** Download Delete Restore

File Name : Description :

Type :

Date :

User ID :

Primary State :

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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.

**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

Upload [Cancel](#)

**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 [Move](#) Clear Description Remove

Upload [Cancel](#)

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.

**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 <input type="button" value="v"/>

Total Number of Files selected: 1

Upload [Cancel](#)

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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
<input checked="" type="checkbox"/> 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](#)

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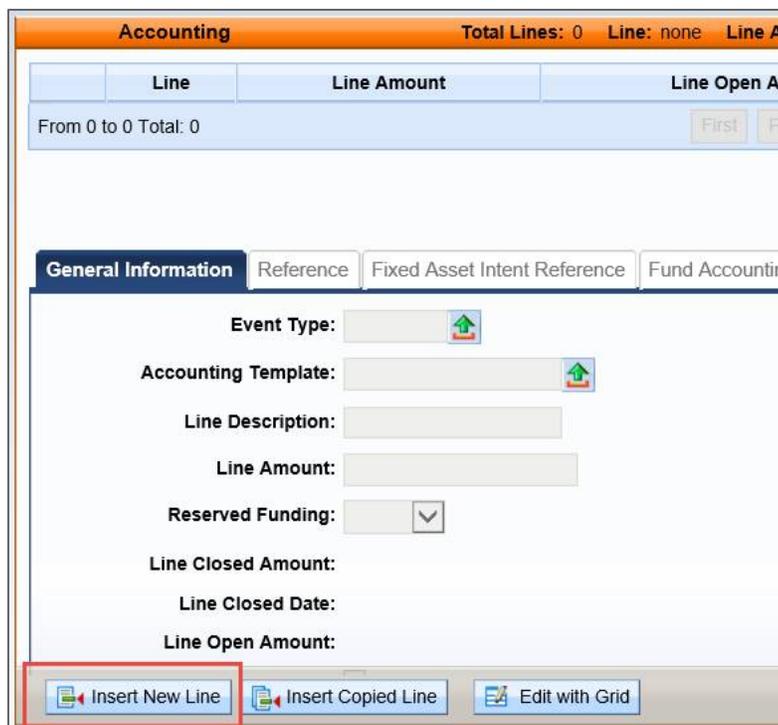
18. Notice that a paper clip icon and a number  appear on the header accordion bar. This signifies that there is an attachment associated with this section.



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



20. Click **Insert New Line**.



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21. Enter your account codes:

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

Accounting				
Accounting Line: 1 Line Amount: \$100.00 Line Open Amount: \$100.00				
Accounting Line	Line Amount	Line Open Amount	Line Closed Amount	Referenced Line Amount
1	\$100.00	\$100.00		\$0.00

From 1 to 1 Total: 1

First Previous Next Last

General Information **Fund Accounting** Detail Accounting

Fund:	012	Object:	4105
Sub Fund:		Sub Object:	
Department:	17A	Revenue:	
Unit:	0336	Sub Revenue:	
Sub Unit:	55	BSA:	0001
Appr Unit:		Sub BSA:	

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

General Information Fund Accounting **Detail Accounting**

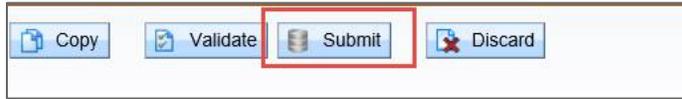
Location:		Reporting:		Major Program:	
Sub Location:		Sub Reporting:		Program:	
Activity:		Task:		Phase:	
Sub Activity:		Sub Task:		Program Period:	
Function:		Task Order:		Percentage:	
Sub Function:					

23. Save, validate and check for errors.

Save Undo Insert New Line  
Copy Validate Submit

## 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**.

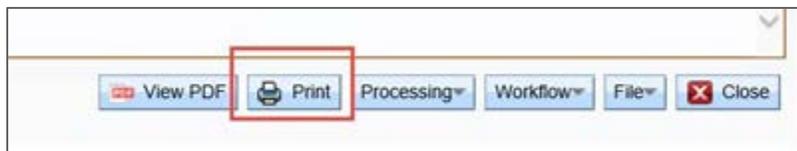


25. If the DO is \$5,000 or less, you will need to monitor the status until it is approved and updated to Final.



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**.

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- 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 20191001000000001719  
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: drcrockett1  
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

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

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

**View Forms**

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

Doc Code : DO  
Doc Dept : 18P  
Document ID : 20190913000000001703  
Description :

Status	Description	Doc Code	Doc Dept	Document ID	File Name	
✓ Pending		DO	18P	20190913000000001703	tdemerchant_3852966_DO_18P_20190913000000001703_1	<a href="#">View PDF</a>

First Prev Next Last

## ADDITIONAL RESOURCES

- Advantage 302 Procurement Commodities Training Guide

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