

PURPOSE

The purpose of this quick reference guide is to illustrate the steps in the Advantage system for creating a requisition (RQS).

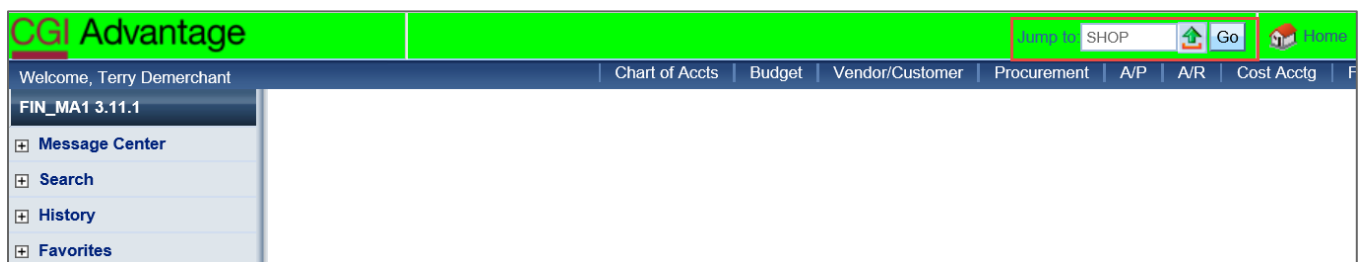
A requisition is created to procure items that are not part of an established master agreement (MA). Please see the Division of Procurement Services Master Agreements webpage for a list of existing MAs: <https://www.maine.gov/dafs/bbm/procurementservices/reports/contract-search>

You will need to create an RQS for these purposes:

- Submitting a confirmation order (a vendor quote or invoice and a Waiver of Competitive Bid [WCB] must be attached); or
- For bidding purposes (detailed specifications must be attached).

STEPS FOR CREATING A REQUISITION

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 Commodities. Then enter your search criteria in the **Search For** field by entering either a key word, commodity code, or vendor name; and click **Search**. (The example below is for ordering snowmobiles for bidding purposes.)

Quick Reference Guide: Creating a Requisition


Revised 10/15/2019

NOTE: In the results, you will notice that both the Quantity and the SC Amount are options. The SC Amount is an option in cases where you have an order with a service line, such as for a software subscription.

Commodities						
Quantity	SC Amount	Unit	Unit Price	Commodity Code	Description	Commodity Specifications
				07043	Snowmobiles (See Class 765 for Snow Blowers and Snow Plows)	

- Once you have identified the line that you want to order from, enter a **Quantity**, **Unit** and the **Unit Price**. If the RQS is for bidding purposes and you don't know the price, enter an estimated amount. 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**.

Shopper



0 Items : \$0.00

[Edit Shopping Cart](#)
[Proceed to Checkout](#)

Check Sources of Supply :
☐ Select All
or check Sources to be searched:
☐ Inventory
☐ MA Catalog Items
☐ Master Agreements
☐ Similar Purchases
☒ Commodities

Advanced Search:
Department :
Commodity :
Vendor :
Part Number :
Price (from) :
Price (to) :
[Search](#) [Clear Search Fields](#)

Warehouse :
Expiration Date :
Include Expired Agreements :
Mandatory Source Enabled :
Include Substitute Stock Items :
Document Description :


Commodities

Quantity	SC Amount	Unit	Unit Price	Commodity Code	Description	Commodity Specifications
5		EA	5800.00	07043	Snowmobiles (See Class 765 for Snow Blowers and Snow Plows)	
				07176	Snowmobiles (See Class 765 for Snow Blowers and Plows)	

First Prev Next Last [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**.

Shopper



1 Item : \$29,000.00

[Edit Shopping Cart](#)
[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. You may choose to enter in a **Delivery Date**, but if you do, take into consideration that the bid will be out for two weeks and there will be a 15-day appeal period after evaluation. Please leave enough time for the bid process to be completed.

Then click **Checkout**.

The screenshot shows the 'Checkout' page. At the top left, a shopping cart icon indicates '1 Item : \$29,000.00' with an 'Edit Shopping Cart' button. Below this is the 'Document Identifier' section, which includes fields for 'Code' (RQS), 'Department' (18P), 'Unit' (WF07), 'ID' (empty), and a checked 'Auto Numbering' checkbox. The 'Additional Information' section below it contains fields for 'Shipping Location' (18P01), 'Billing Location' (18P02), 'Accounting Template', 'Accounting Profile', 'PCard ID', 'PCard Expiration Date', 'Delivery Date' (12/31/2019), and 'Group Purchases By' (Group All PO Commodities Together). At the bottom are 'Continue Shopping' and 'Checkout' buttons.

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

This screenshot shows the same 'Checkout' page as before, but with a 'Message from webpage' pop-up box in the foreground. The pop-up box contains a question mark icon and the text 'Do you want to Checkout?'. It has two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangle. The background page shows the cart now has '2 Items : \$252.00' and the 'Document Identifier' section now has 'Code' set to 'DO'.

- The RQS document is now created and will open on the Header section. From this screen, enter the **Document Description**.

The screenshot shows the 'Header' section of the RQS document. The 'General Information' tab is selected. The 'Document Description' field is highlighted with a red box and contains the text 'Snowmobiles for the Warden Service'. Other fields include 'Document Name', 'Record Date', 'Budget FY', 'Fiscal Year', 'Period', 'Accounting Profile', 'Procurement Folder', 'Procurement Type ID', 'Procurement Type', 'Tracking Number', 'Warehouse', 'Total of Header Attachments', and 'Total of All Attachments'. The 'Actual Amount' is \$29,000.00 and the 'Closed Amount' is \$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 'Header' section of the RQS document. The 'Requestor Issuer Buyer' tab is selected. The 'Requestor ID' field is highlighted with a red box and contains the text 'Idemerchant'. Other fields include 'Issuer ID', 'Terry Demerchant', '207-624-7334', 'TERRY.L.DEMERCHANT@MAINE.GOV', 'Buyer Team', 'Buyer', 'Award Officer Name', 'Award Officer Phone Number', 'Award Officer Phone Extension', 'Award Officer Email', 'Name', 'Email', 'Phone Number', and 'Requestor Name'. The 'Save' button is highlighted with a red box.

- If the RQS is for a confirmation order or a sole source order, you must enter a vendor. To enter a vendor, click on **Vendor** and click **Insert New Line**. Then proceed to step 10.

The screenshot shows the 'Vendor' section of the RQS document. The 'Vendor Customer' tab is selected. The 'Insert New Line' button is highlighted with a red box. Other fields include 'Vendor Customer', 'Legal Name', 'Alias/DBA', 'Address Code', 'Fax', 'Fax Extension', 'Web Address http://', 'Vendor Contact ID', 'Vendor Contact Name', 'Vendor Contact Phone', 'Vendor Contact Phone Ext.', and 'Vendor Contact Email'. The 'Insert Copied Line' and 'Edit with Grid' buttons are also visible.

Quick Reference Guide: Creating a Requisition

Revised 10/15/2019

If the RQS is for bidding, do not enter in a vendor and continue to step 11 (**Commodity**).

- Go to **Vendor Customer** and enter the **vendor customer number** or click on the picklist to search for your vendor. Once you have selected your vendor, click **Save** to bring in all the vendor information.

The screenshot shows the 'Vendor Customer' form. At the top, it displays 'Vendor Customer: VC0000101305' and 'Legal Name: North Country Powersports'. Below this is a table with columns 'Line Number', 'Vendor Customer', and 'Legal Name'. The first line shows '1', 'VC0000101305', and 'North Country Powersports'. Below the table are navigation buttons: 'First', 'Previous', 'Next', 'Last', and a 'Show Lines' dropdown set to '10'. The main form area has tabs for 'Vendor' and 'Additional Information'. The 'Vendor' tab is active, showing fields for 'Vendor Customer' (VC0000101305), 'Legal Name' (North Country Powersports), 'Alias/DBA', 'Address Code' (AD001), and a list of address lines: '907 Kennedy Memorial Dr.', 'Oakland', 'ME', '04963', and 'US'. To the right, there are fields for 'Vendor Contact ID' (PC001), 'Vendor Contact Name' (Duncan Widdoes), 'Vendor Contact Phone' (207-465-2513), 'Vendor Contact Phone Ext.', and 'Vendor Contact Email'. At the bottom, there are buttons for 'Save', 'Undo', 'Insert New Line', 'Insert Copied Line', and 'Edit with Grid'.

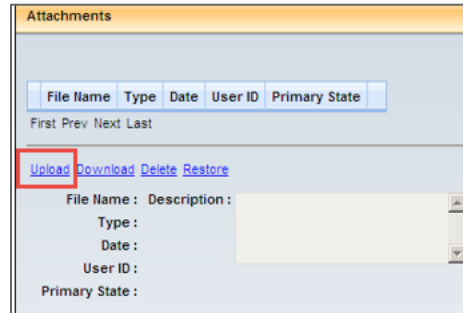
- Go to **Commodity**. Find the **CL Description**; change the description to what you are looking for and hit **Save**.

The screenshot shows the 'Commodity' form. At the top, it displays 'Total Lines: 1', 'Line Number: 1', 'Item Total Amount: \$29,000.00', and 'Open Amount: \$0.00'. Below this is a table with columns 'Line Number', 'CL Description', 'Item Total Amount', and 'Open Amount'. The first line shows '1', '2020 Ski-doo Explorer', '\$29,000.00', and '\$0.00'. Below the table are navigation buttons: 'First', 'Previous', 'Next', 'Last', and a 'Show Lines' dropdown set to '10'. The main form area has tabs for 'General Information', 'Reference', 'Shipping/Billing', 'Specifications', 'Tolerance', and 'Additional Information'. The 'General Information' tab is active, showing fields for 'CL Description' (2020 Ski-doo Explorer), 'Commodity' (07043), 'Stock Item Suffix', 'External Warehouse', 'Fixed Asset' (checked), 'Commodity Specs', 'Inactive Line' (unchecked), and 'Lock Order Specs' (No). Below the 'CL Description' field, there is a note: 'Snowmobiles (See Class 765 for Snow Blowers and Snow Plows)'. At the bottom, there is a 'Line type' dropdown set to 'Snowmobiles'.

ATTACHING DOCUMENTS

- To attach documents to an RQS, such as the detailed specifications: Go to the lower right and find the File button, click **File**, then **Attachments**.

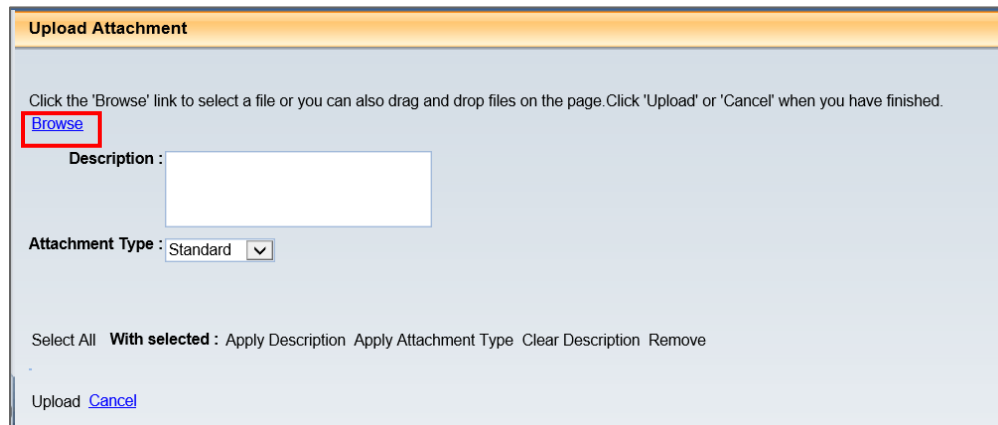
13. Click **Upload**.



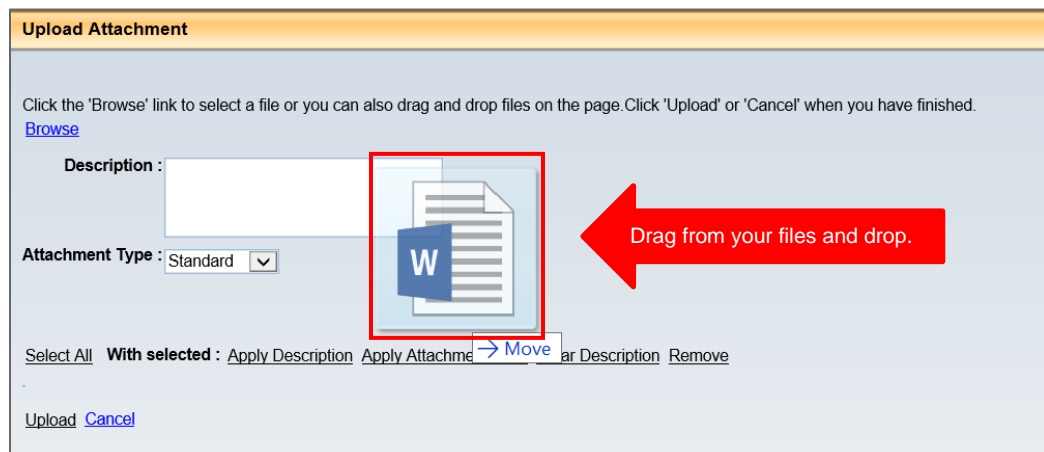
The screenshot shows a window titled "Attachments". At the top, there is a table with columns: File Name, Type, Date, User ID, and Primary State. Below the table are navigation links: First, Prev, Next, Last. Below these are four buttons: Upload, Download, Delete, and Restore. The "Upload" button is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

14. 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 window titled "Upload Attachment". It contains the following text: "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." Below this text is a "Browse" button, which is highlighted with a red box. Below the "Browse" button is a "Description" input field. Below the "Description" field is an "Attachment Type" dropdown menu, currently set to "Standard". Below the dropdown menu are several links: "Select All", "With selected", "Apply Description", "Apply Attachment Type", "Clear Description", and "Remove". At the bottom of the window are "Upload" and "Cancel" buttons.



The screenshot shows the same "Upload Attachment" window as the previous one. In this version, a file icon (a document with a blue 'W' logo) is being dragged and dropped onto the "Description" input field. A red box highlights the file icon. A large red arrow points from the right towards the file icon, with the text "Drag from your files and drop." written inside it. The "Browse" button is no longer highlighted. The "Attachment Type" dropdown menu is still set to "Standard". The links at the bottom are "Select All", "With selected", "Apply Description", "Apply Attachment Type", "Move", "Clear Description", and "Remove". The "Upload" and "Cancel" buttons are still at the bottom.

15. 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

Total Number of Files selected: 1

[Upload](#) [Cancel](#)

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

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 checked="" type="checkbox"/>	Attachment spec.pdf	Specifications	Standard

Total Number of Files selected: 1

[Upload](#) [Cancel](#)

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

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

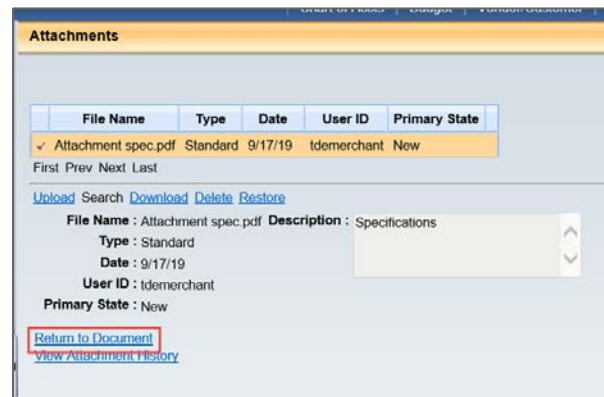
	File Name	Description	Attachment Type	File Size
	Attachment spec.pdf	Specifications	Standard	325.34 KB

file uploaded successfully

Total Number of Files selected: 1
Total Files Size: 325.34 KB

[Upload](#) [Done](#)

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



19. Notice that a paper clip icon and a number **1** appear on the header accordion bar. This signifies that there is an attachment associated with this section.



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



21. Click **Insert New Line**.

Accounting Total Lines: 0 Line: none Line A

Line	Line Amount	Line Open A
From 0 to 0 Total: 0		

General Information Reference Fixed Asset Intent Reference Fund Accountin

Event Type:

Accounting Template:

Line Description:

Line Amount:

Reserved Funding:

Line Closed Amount:

Line Closed Date:

Line Open Amount:

Insert New Line **Insert Copied Line** **Edit with Grid**

22. Enter your account codes:

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

Accounting Total Lines: 1 Line: 0 Line Amount: Line Open Amount:

General Information Reference Fixed Asset Intent Reference **Fund Accounting** Detail Accounting Payment Details

Fund: 010

Sub Fund:

Department: 18P

Unit: 1200

Sub Unit: 01

Appr Unit:

Object: 5650

Sub Object:

Revenue:

Sub Revenue:

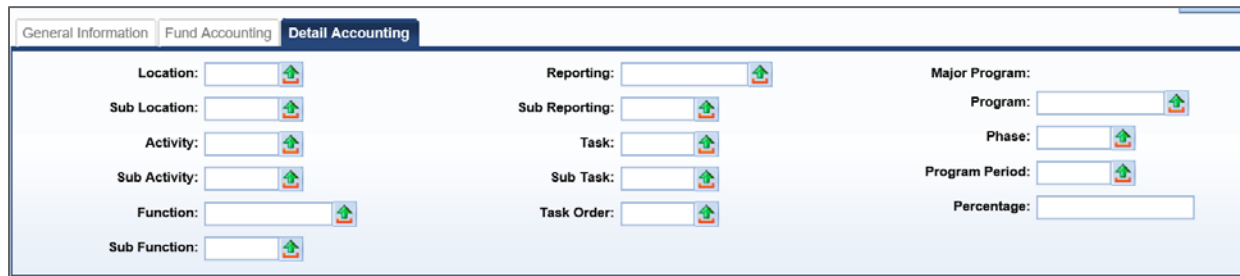
BSA:

Sub BSA:

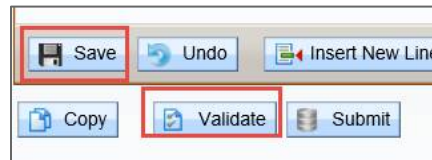
Quick Reference Guide: Creating a Requisition

Revised 10/15/2019

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



24. Save, validate and check for errors.

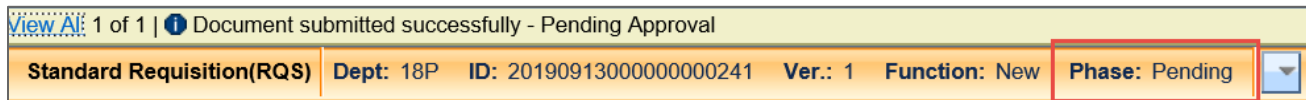


SUBMITTING THE RQS

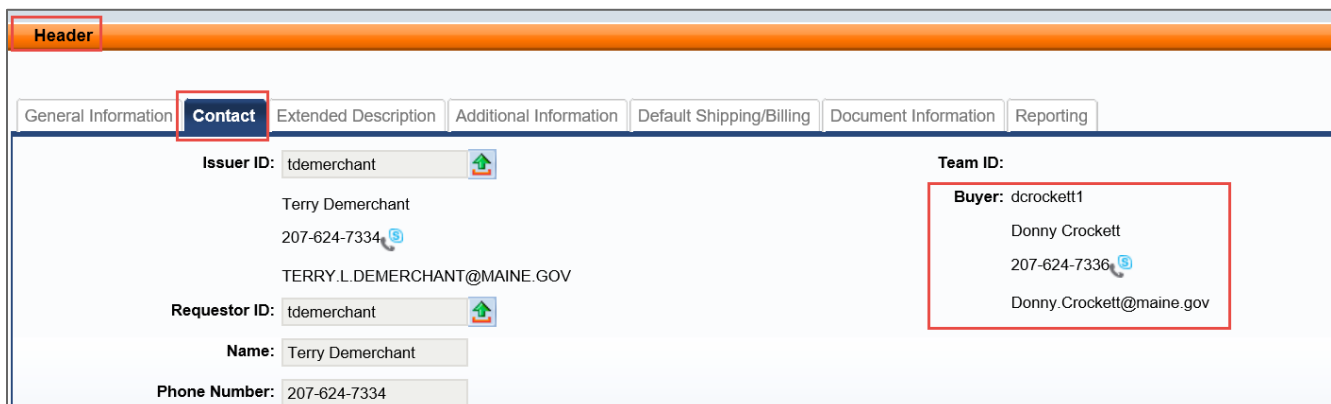
25. Once all the above steps are complete and any errors have been resolved, click **Submit**.



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



26. Once all approvals have been completed on your end, the RQS will have a final status and will route to the buyer that is associated with the commodity code you have chosen. To see who that buyer is, go back to the header and click the Contact tab. The buyer information will be displayed on the right.



ADDITIONAL RESOURCES

- Advantage 302 Procurement Commodities Training Guide

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