Introduction

An Agency Purchase Order (APO) is a formal agreement established with a vendor to either purchase goods or services.

State of Maine Policy

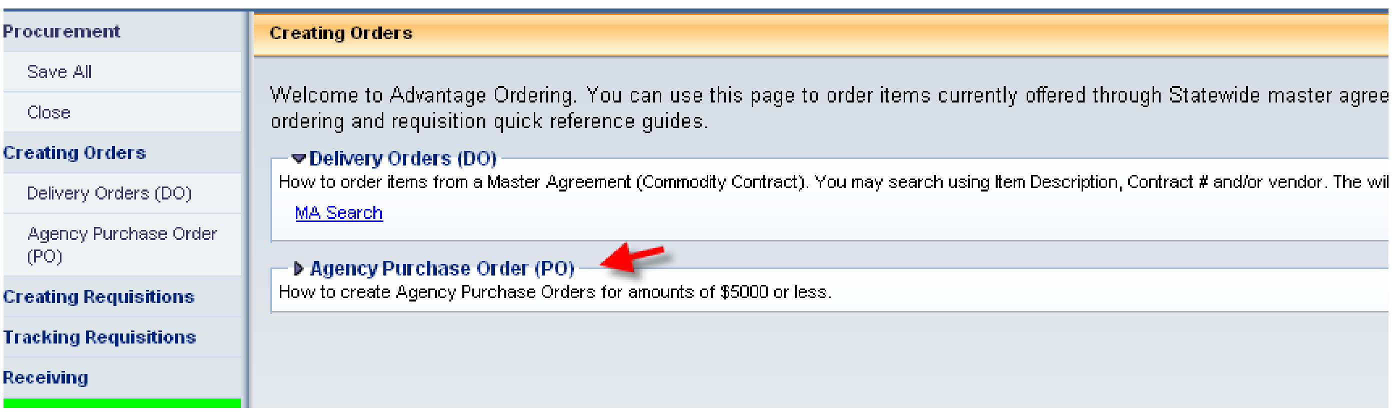
An Agency Purchase Order (PO) may be created to purchase items that are valued at $5000 or less, for items not on commodity contract or printing or if the vendor does not accept the State procurement card. The Procurement Type is APO, the Procurement document code is PO and the event type must always be PR07 (non-encumbering).

NOTE: Creating the PO document is optional. You can choose to use your pcard if it is within your dollar limit.

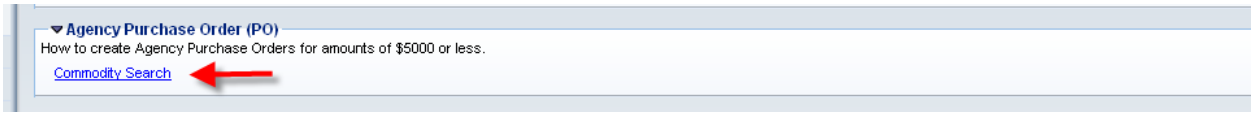
Creating a PO document

From the workspace at the top of your page click on Procurement:

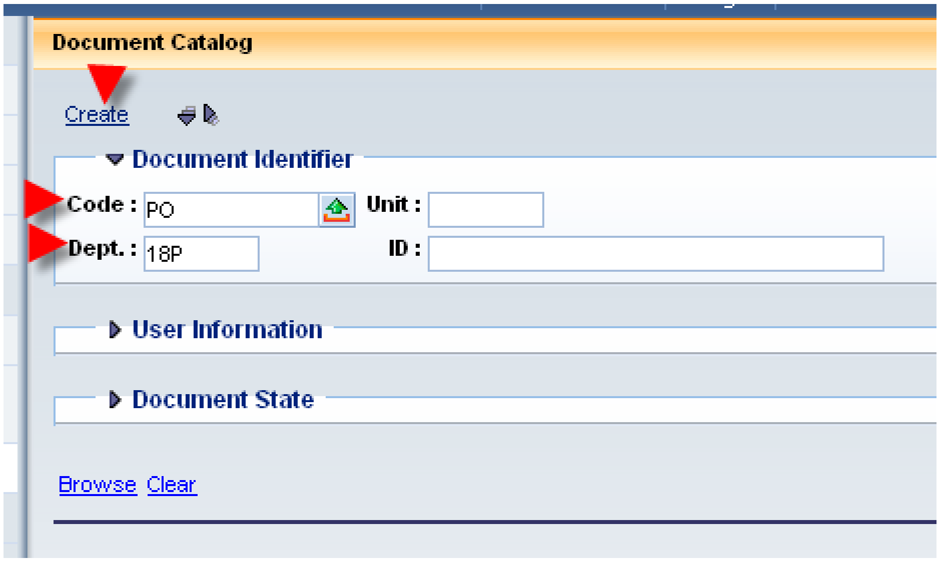
Click on the Agency Purchase Order (PO) link



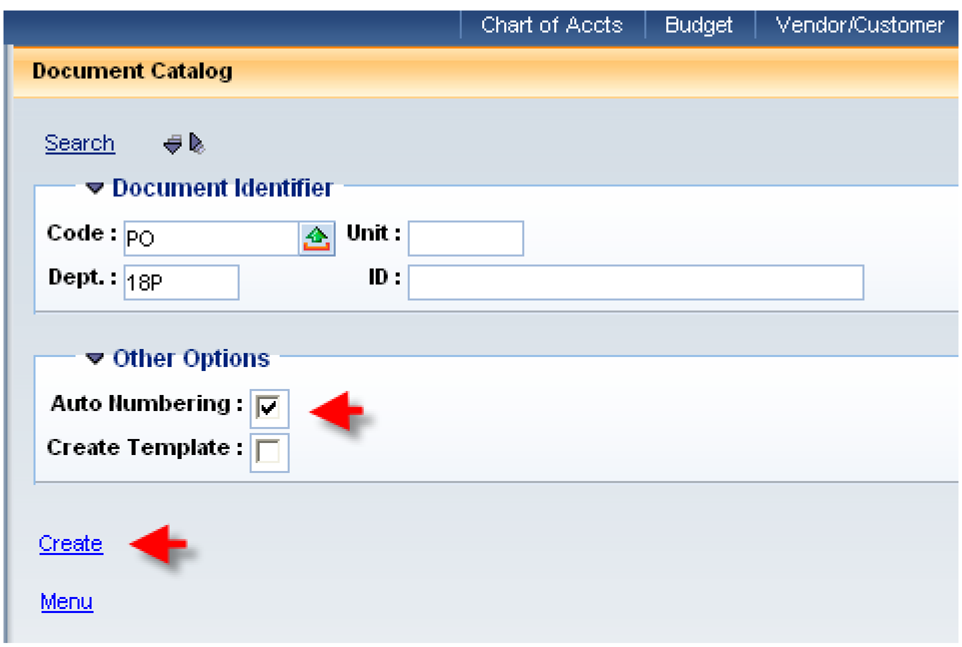
Then click on Commodity Search



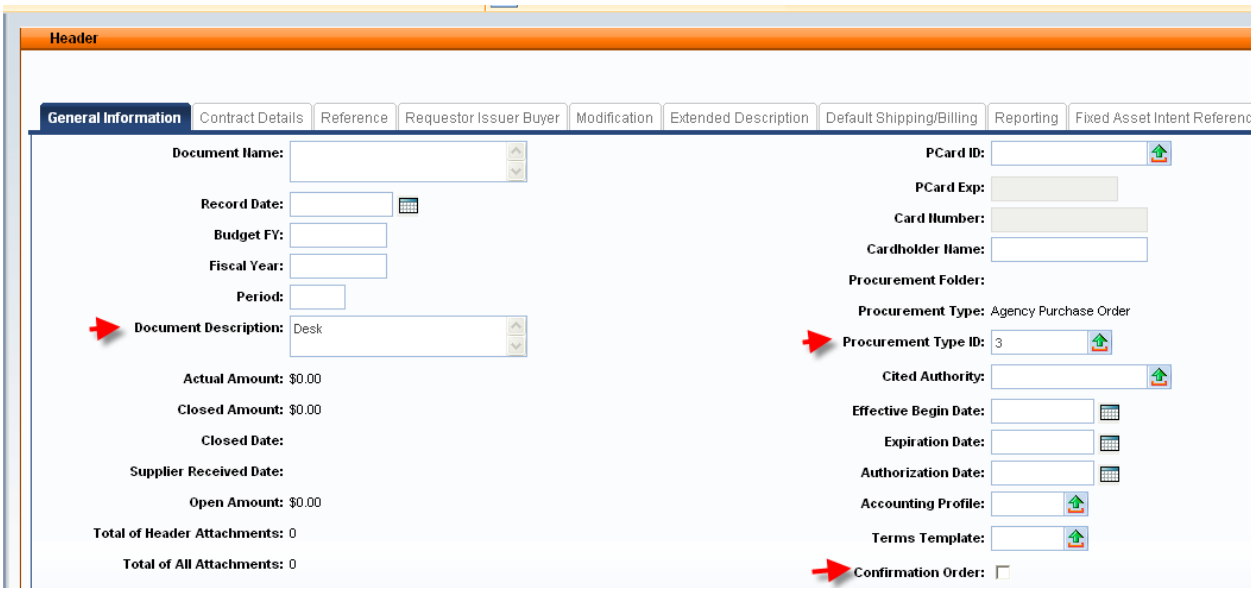
Clicking commodity Search will take you to the Document Catalog page. In the Code field type in PO and under the Dept field put in your agency number. I put in 18P as that is my agency number. Then click Create.



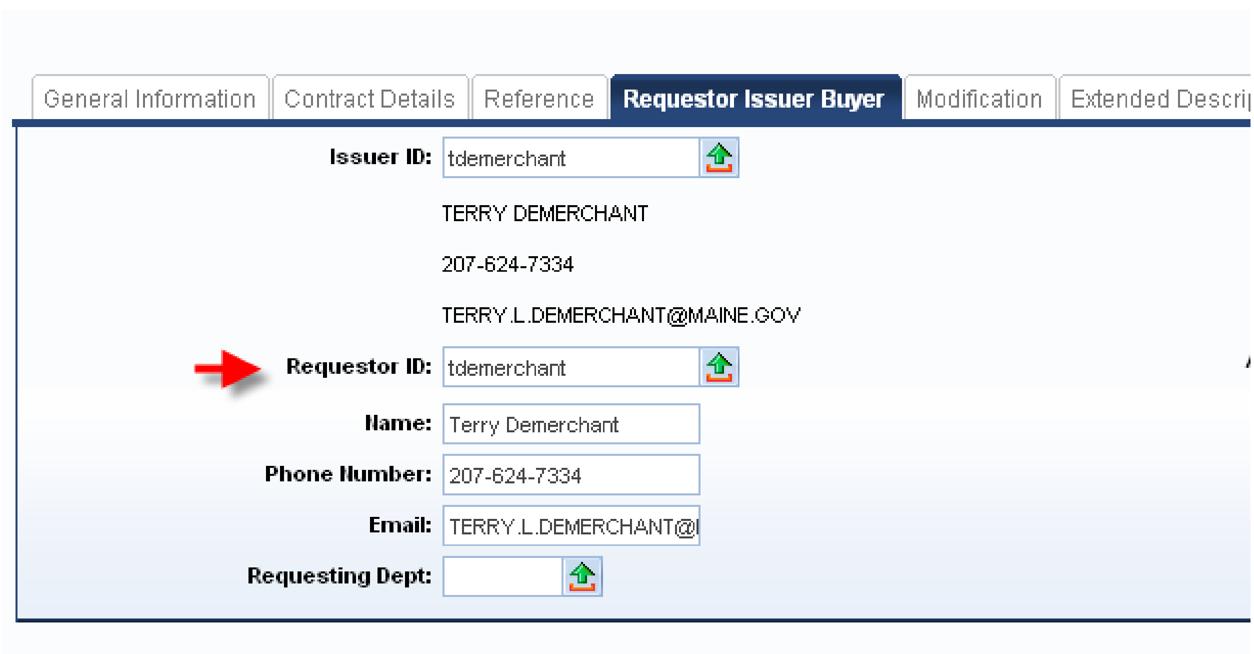
Check Auto Numbering and Create. You do not need to put in a workflow unit in the Unit field as PO's do not require approval. Once you validate & submit the document it goes to Final.



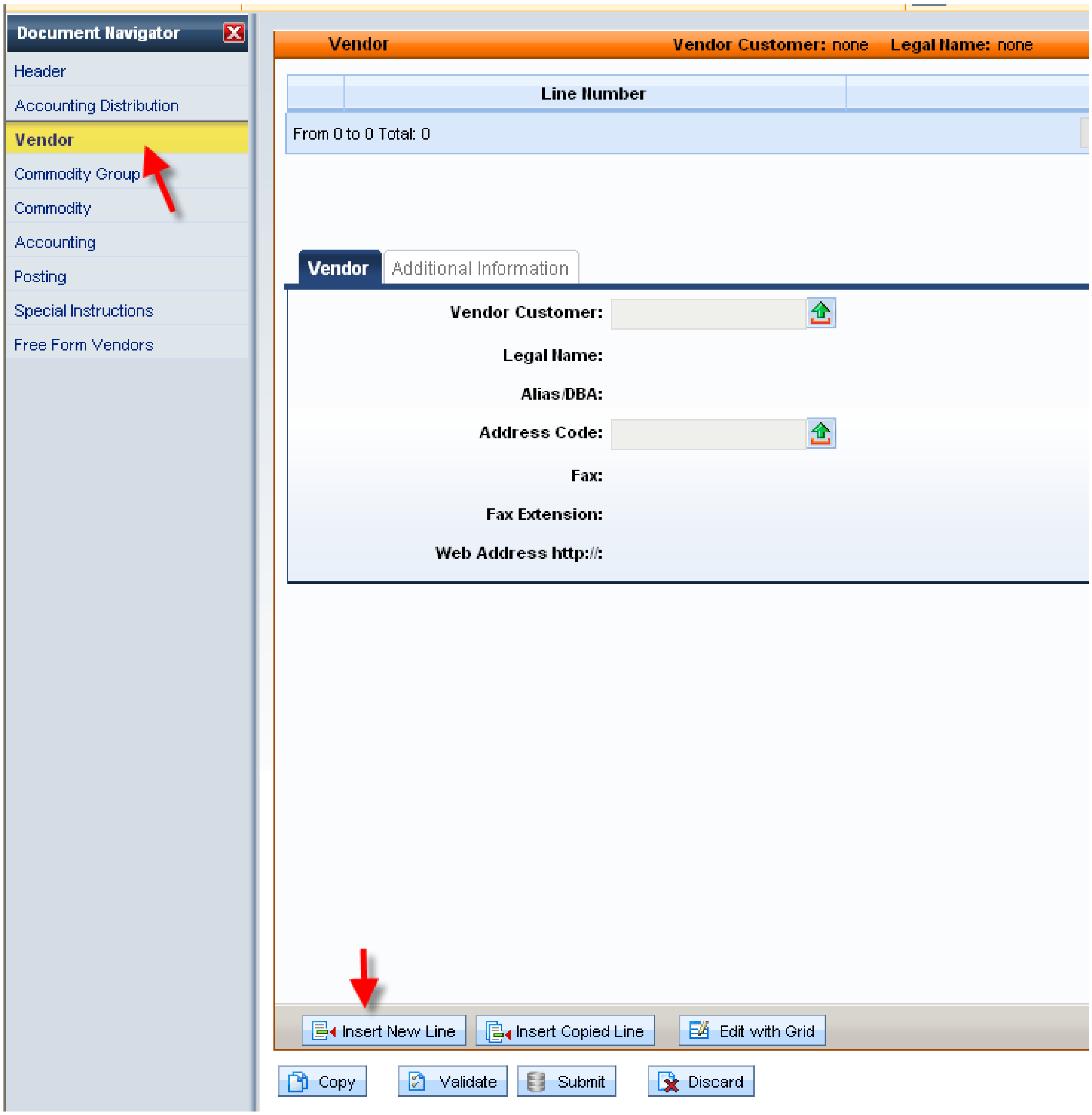
Your PO document will open up on the Header page/General Information tab. You will need to enter in a Document Description, enter 3 in the Procurement Type ID (which stands for Agency Purchase Order) and if it is a confirmation check the Confirmation Box.



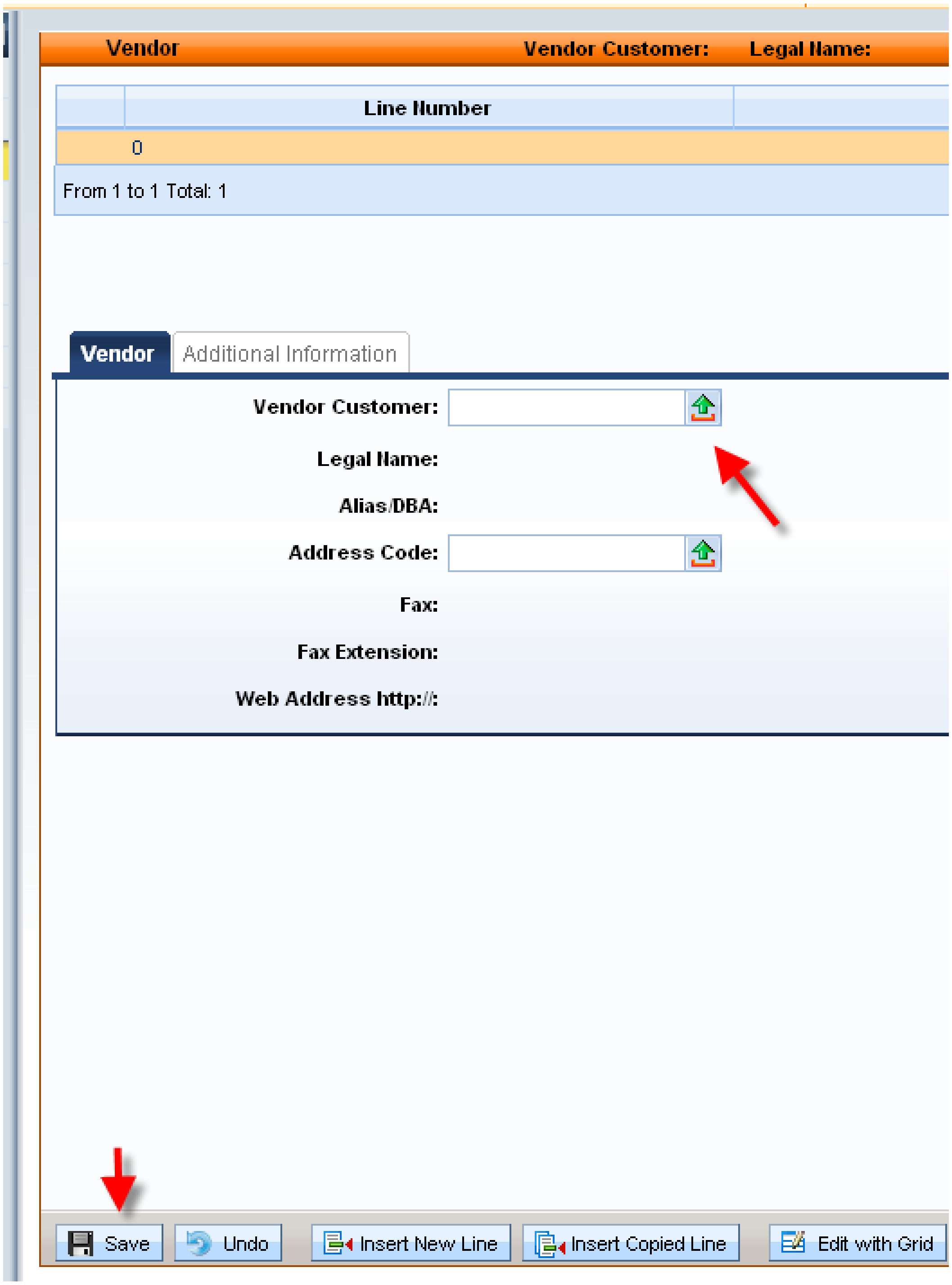
Next click on the Requester Issuer Buyer tab and enter in the the Requester ID (most of the time this will be your userid). Now click on Save.



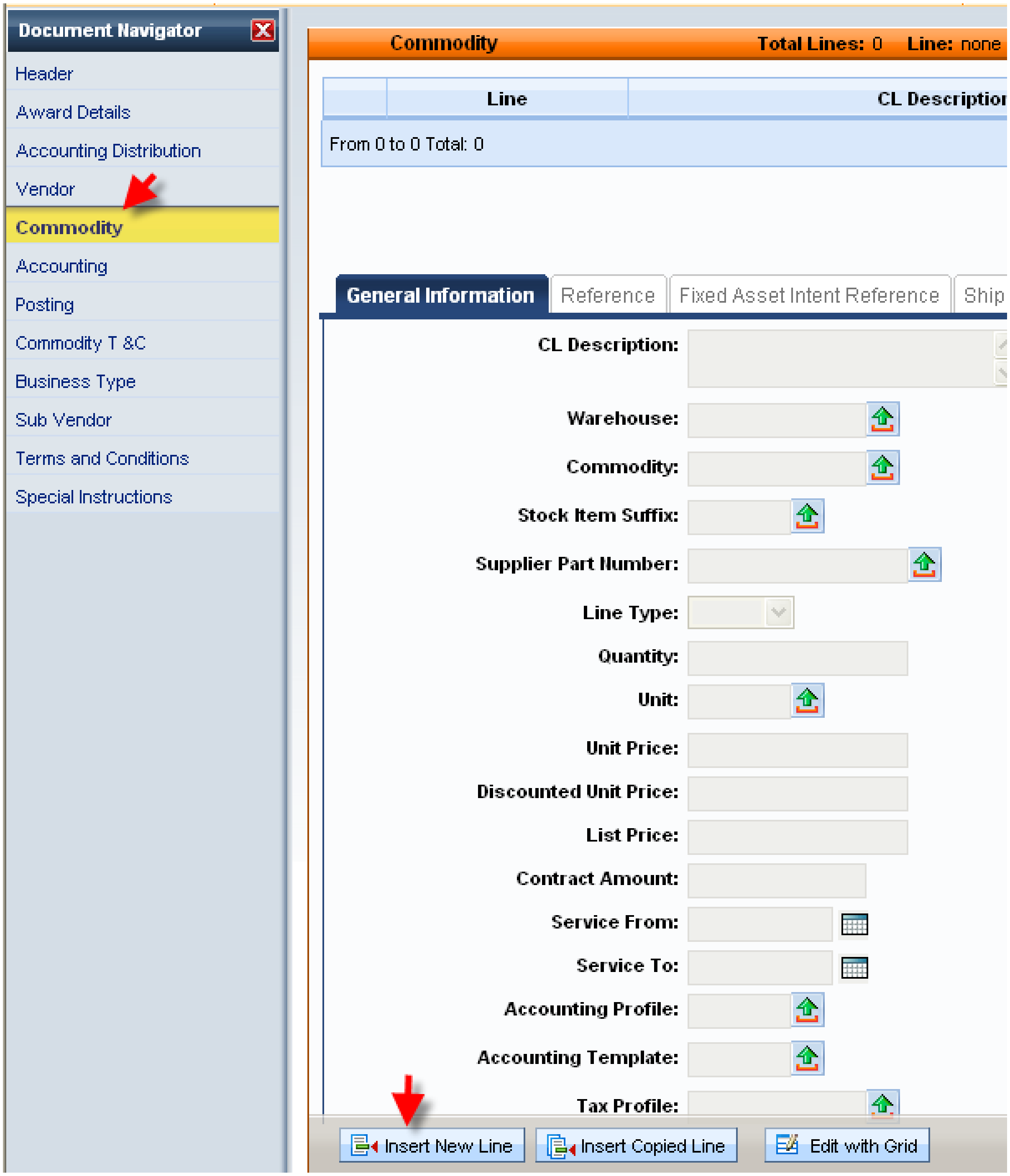
You will now need to put in the vendor. From the Document Navigator on the left hand side click on Vendor. You will notice that the fields are grayed out – you will have to scroll to the bottom to click on Insert New Line:



Enter in the Vendor Customer code or use the pick list to search for your vendor. Once inserted click on save.

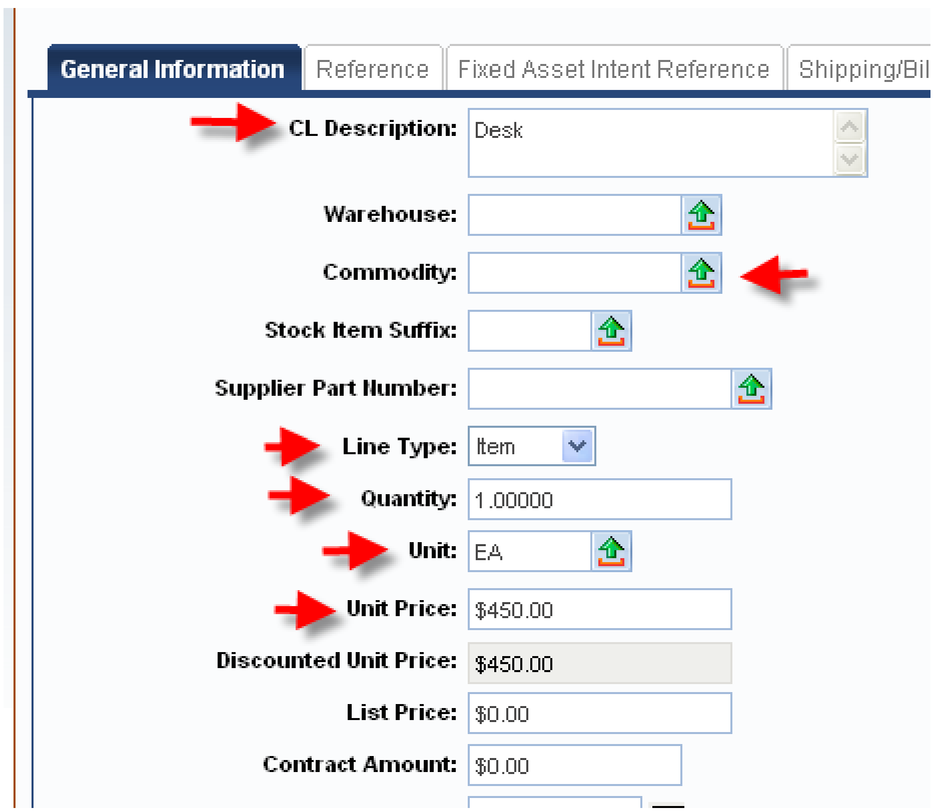


From the Document Navigator on the left hand side click on Commodity. You will notice that the fields are grayed out – you will have to scroll to the bottom to click on Insert New Line:

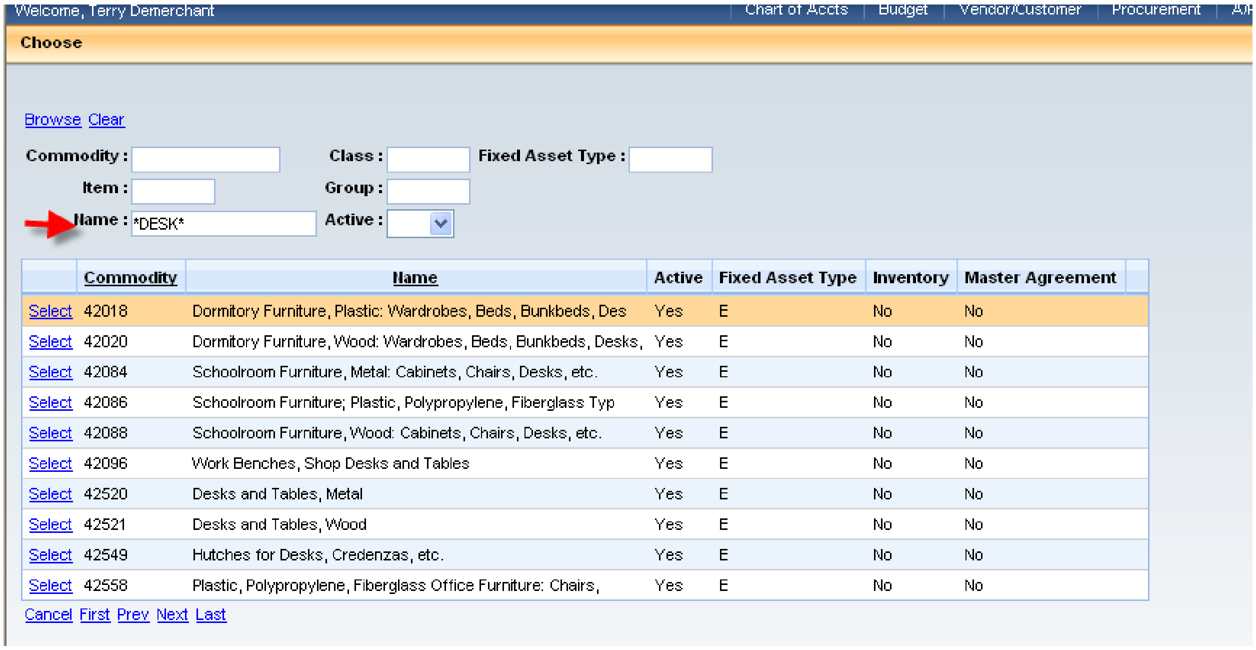


Once the page is activated you will need to enter a CL Description, Commodity, Line Type, Quantity, Unit and Unit Price. For this activity I am going to be ordering a Desk.

You will notice that I put Desk under the CL Description and the Line Type I chose Item and the Quantiy is 1 as I'm only ordering one desk. The unit of measure I put in as ea but if you do not know what your unit of measure is you can click on the pick list. I didn't know what the commodity number is so I am going to click on the pick list to find it.

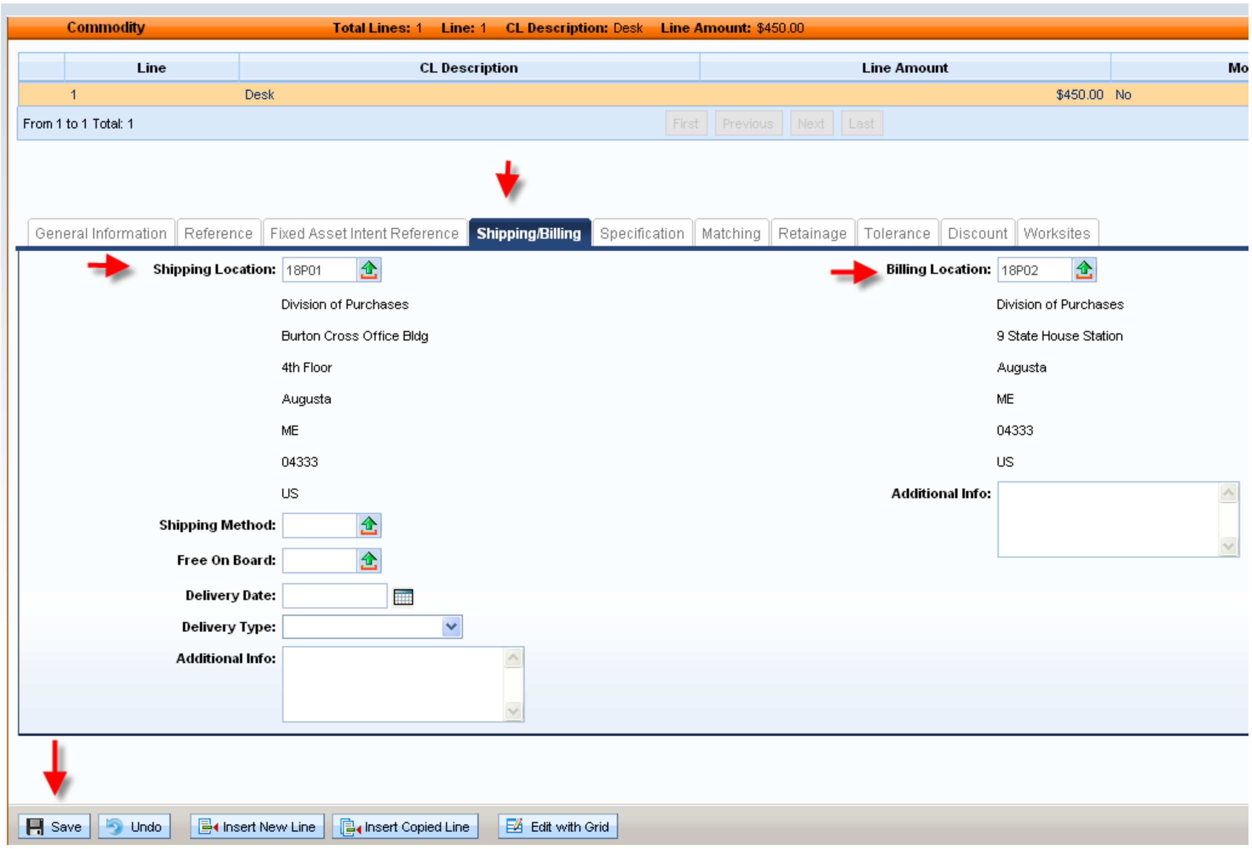


Under name I'm going to type in *Desk* which when I click on Browse it will search for every descripton with Desk in it. I'm going to select one of the options it gives me.

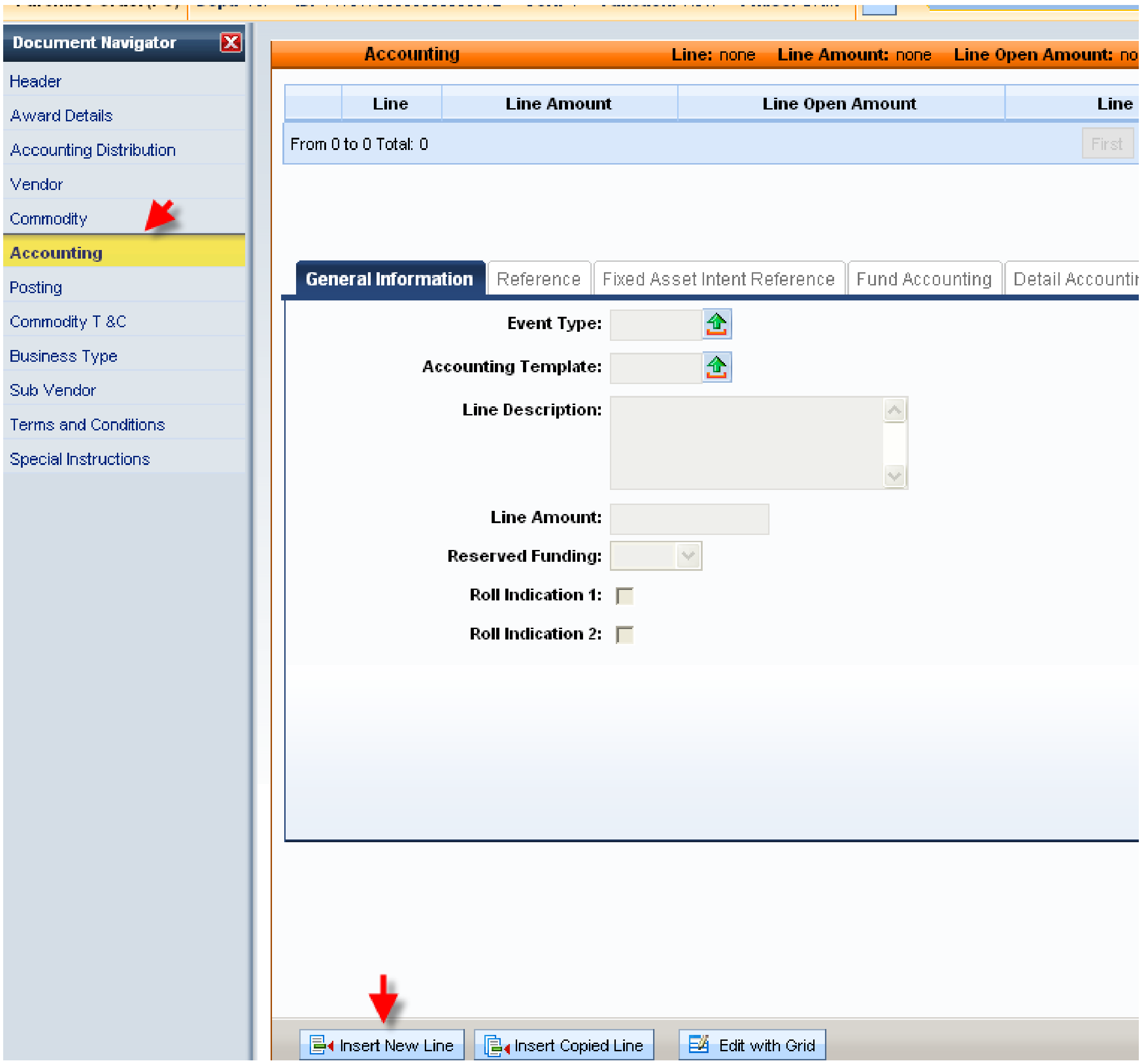


	Commodity	Name	Active	Fixed Asset Type	Inventory	Master Agreement
Select	42018	Dormitory Furniture, Plastic: Wardrobes, Beds, Bunkbeds, Des	Yes	E	No	No
Select	42020	Dormitory Furniture, Wood: Wardrobes, Beds, Bunkbeds, Desks,	Yes	E	No	No
Select	42084	Schoolroom Furniture, Metal: Cabinets, Chairs, Desks, etc.	Yes	E	No	No
Select	42086	Schoolroom Furniture; Plastic, Polypropylene, Fiberglass Typ	Yes	E	No	No
Select	42088	Schoolroom Furniture, Wood: Cabinets, Chairs, Desks, etc.	Yes	E	No	No
Select	42096	Work Benches, Shop Desks and Tables	Yes	E	No	No
Select	42520	Desks and Tables, Metal	Yes	E	No	No
Select	42521	Desks and Tables, Wood	Yes	E	No	No
Select	42549	Hutches for Desks, Credenzas, etc.	Yes	E	No	No
Select	42558	Plastic, Polypropylene, Fiberglass Office Furniture: Chairs,	Yes	E	No	No

Now click on the Shipping/Billing tab to enter in your locations. Mine are 18P01 and 18P02 so that is what I will enter. If this is not a confirmation you can also enter in a Delivery Date as to when you want the item delivered. Now you can hit save.

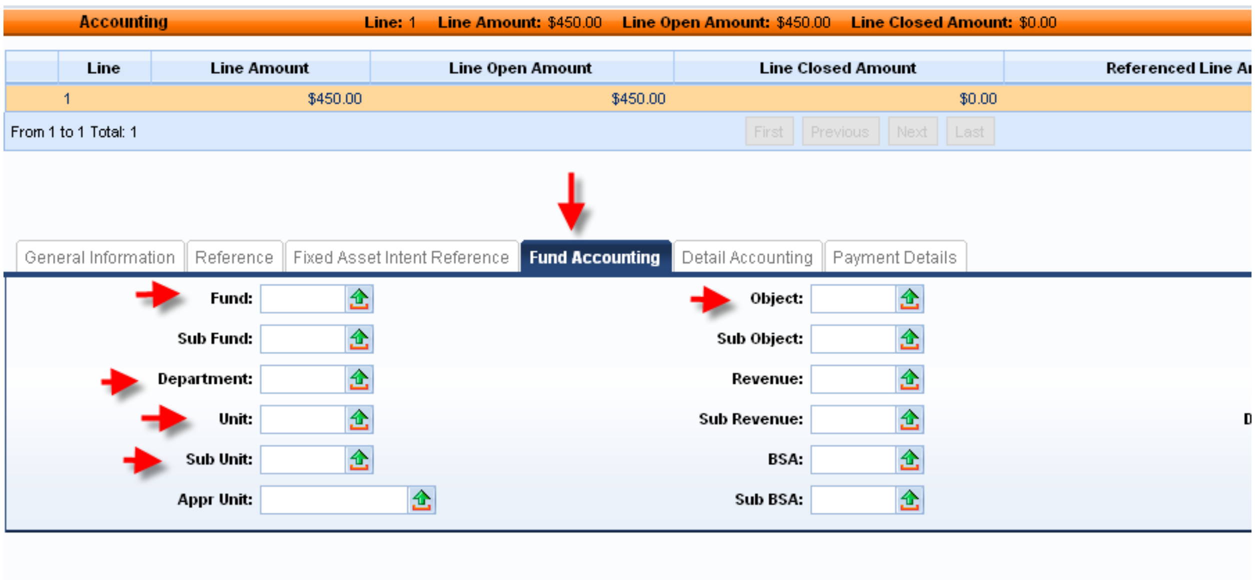


From the Document Navigator on the left hand side click on Accounting. You will notice that the fields are grayed out – you will have to scroll to the bottom to click on Insert New Line:

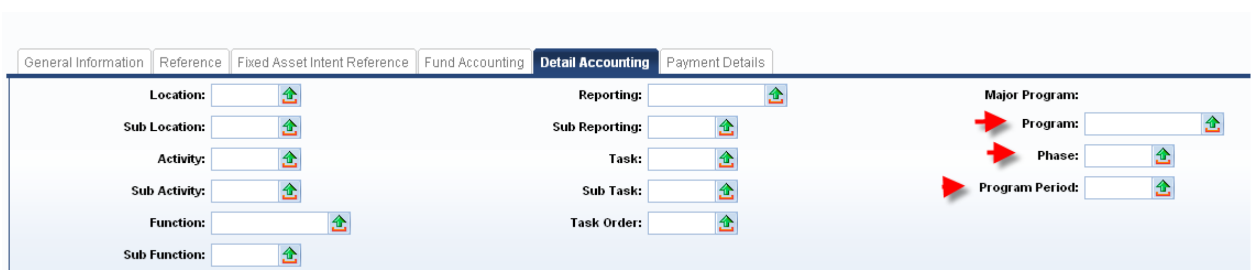


Hint – if you click on Commodity then go back to Accounting the General Information section will automatically fill so you don't have to enter in anything.

Click on the Fund Accounting tab and enter in your Fund, Department, Unit, Sub Unit and Object and click on Save. If you are using a Balance Sheet account then you would not fill in the Object field but the BSA field instead.



If your agency want you to fill out the Detailed Accounting section you can click on this Tab to enter information here and click save. You may also have other field in this section to fill out – this is just a sample



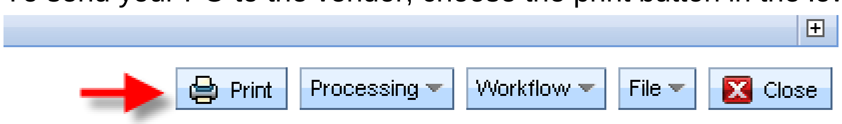
If you want to split code to use another accounting string just simply click on Insert New line to enter your second line of coding. You can use as many lines of coding that you want.

Optional:

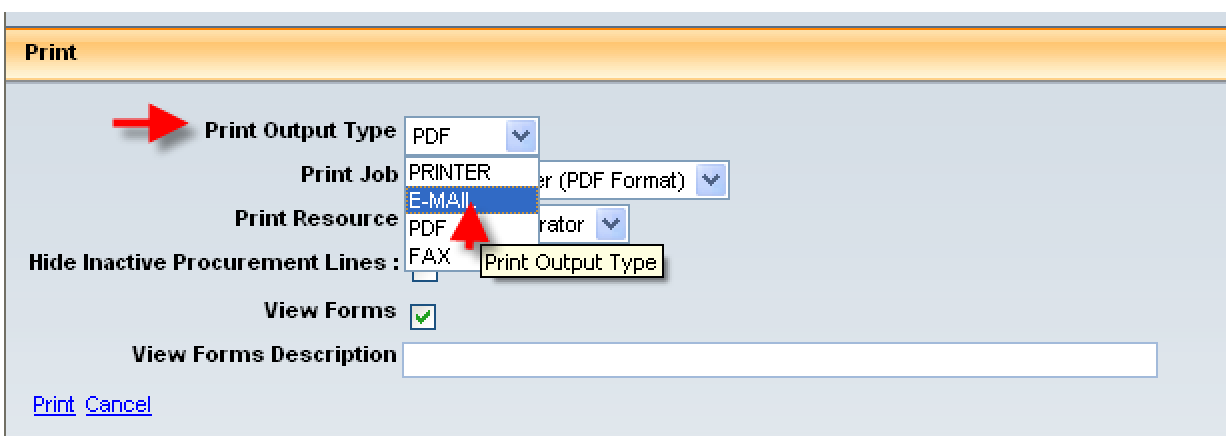
If you had multiple commodity lines and you want the same accounting lines to be applied to all the lines you would use Accounting Distribution. Insert New Line, Under General Information indicate Distribution percent (often times it is 100%,) click on Fund Accounting to enter your accounting string then click save. This will activate the Disbribute Accounting Lines button (lower right corner of section). Once you press this button the accounting string you put in will be applied to all commodity lines

Now you are all set to validate & submit your document. Once it is set to Final you can go ahead and e-mail it to the vendor – if it is a confirmation you can skip this step.

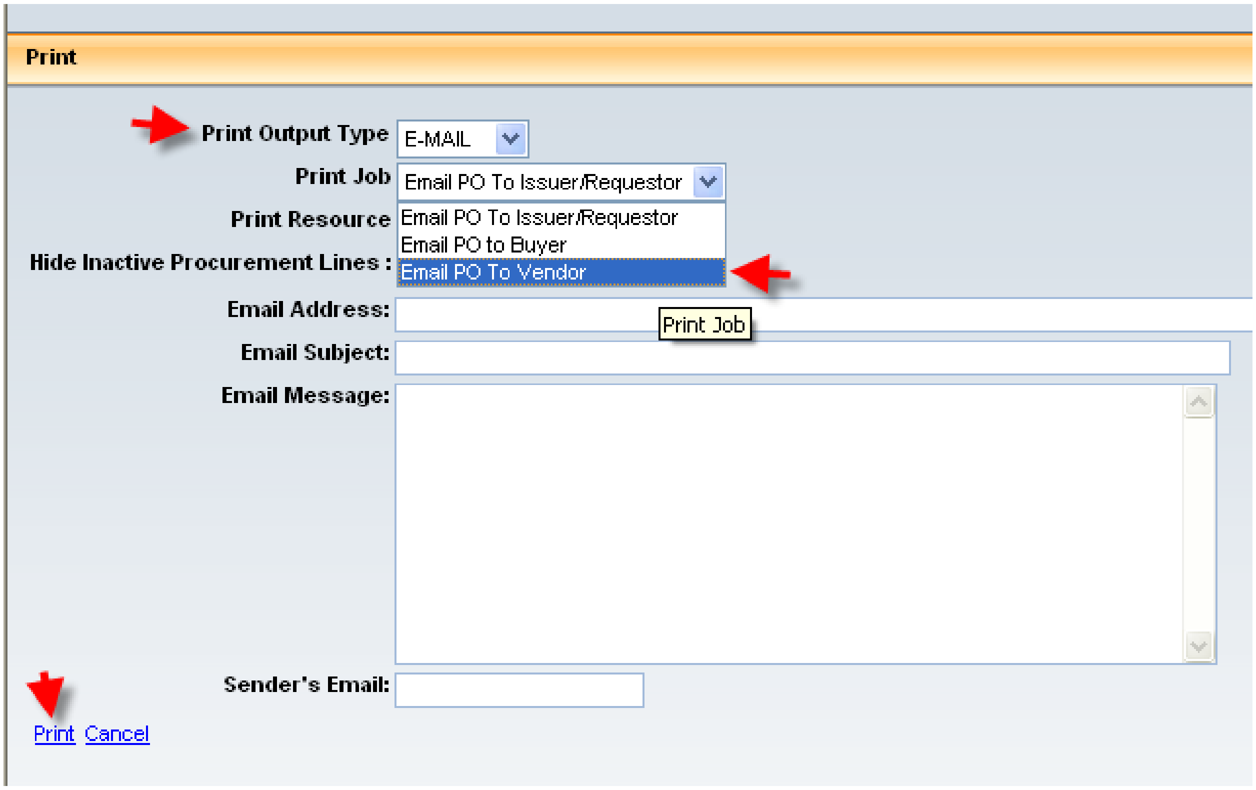
To send your PO to the vendor, choose the print button in the lower right hand corner.



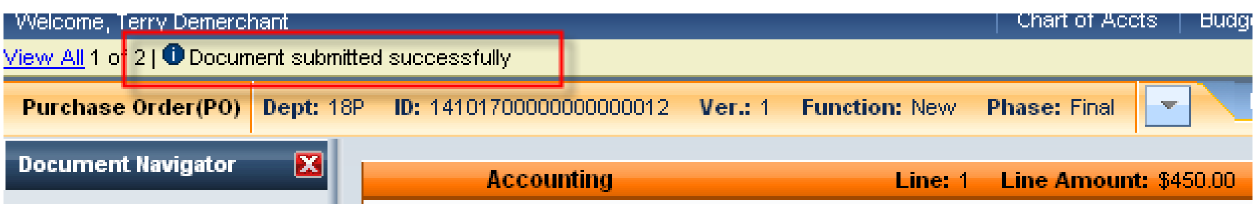
Under the Print Output Type – choose the drop down box to select "E-Mail"



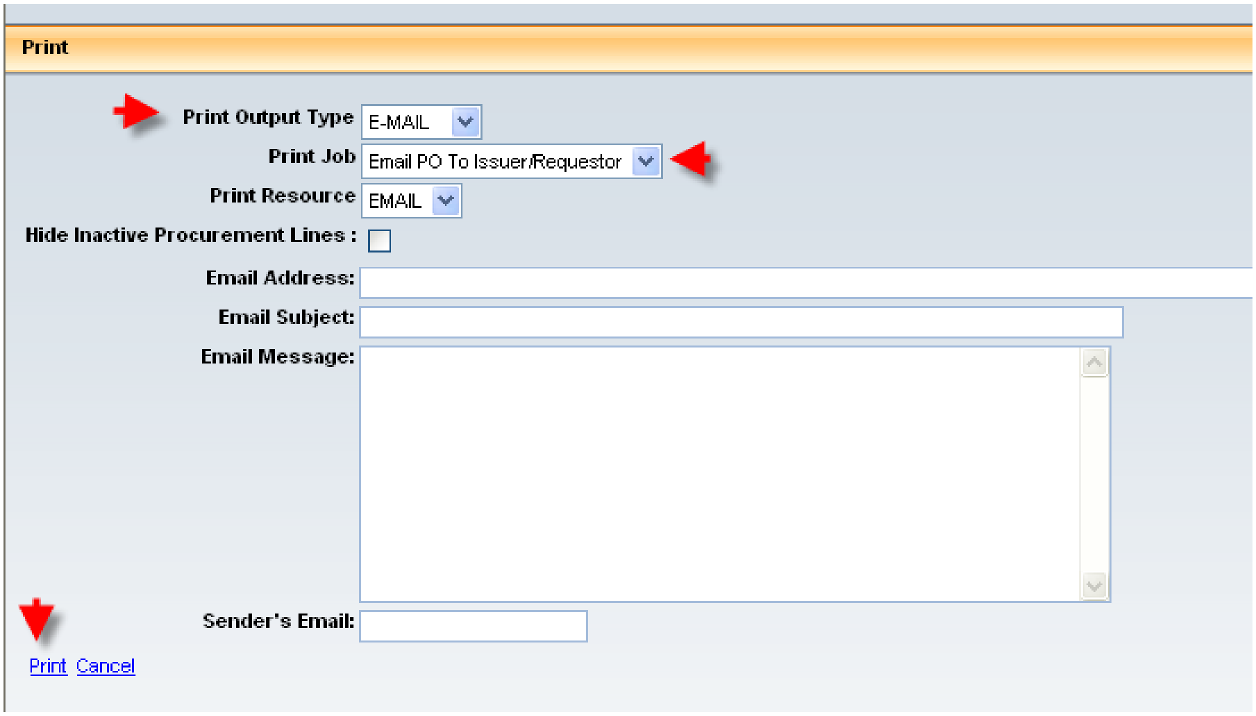
Under the Print Job – use the drop down to select Email PO to vendor then click print



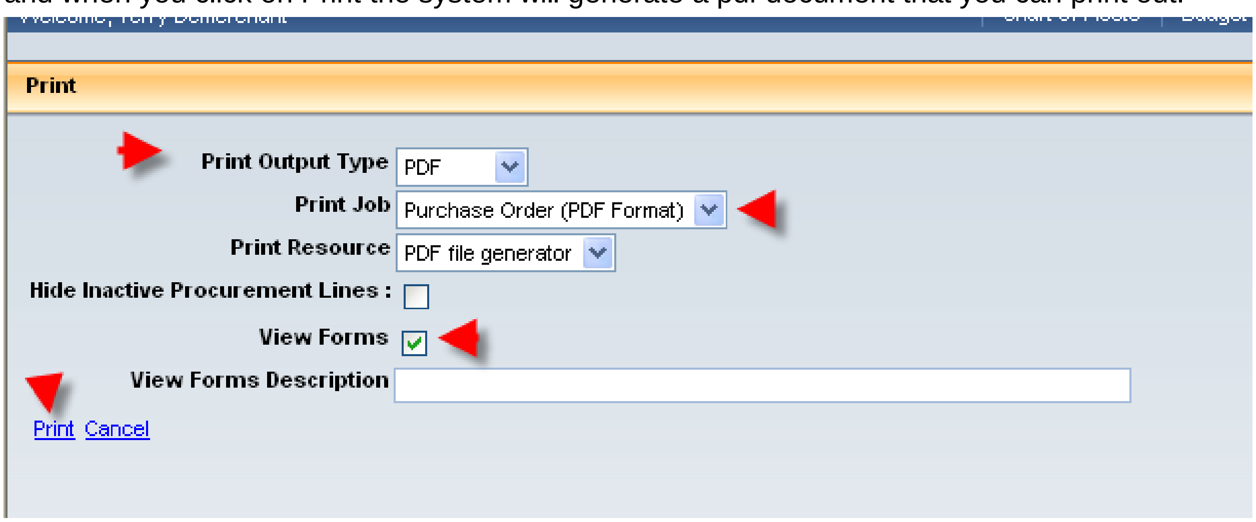
Even though the Document will say "Document print job was successfully submitted" please be assured that the document was e-mailed to the vendor.



You could also choose to print a document for your records by performing the same steps except under the Print Job you would choose Email PO to Issuer/Requester and the system will e-mail you a pdf of the document to print off.



Or you could select PDF in the dropdown section under Print Output Type – View Forms will be checked and when you click on Print the system will generate a pdf document that you can print out.



If you run into any problem and require assistance you can call any of the Purchases Staff to assist you in completing your document. Purchases Staff information can be located on the Division of Purchases website at http://www.maine.gov/purchases/info/contact.shtml