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. The PO could also be used for vendors that do 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 p-card if it is within your dollar limit.

For more information on this topic, please refer to the 302 Procurement Commodities training book on the OSC website.

Creating a PO document

1. Click **Procurement** from workspaces at the top of page. 2. Click Agency Purchase Order (PO) on the left navigation panel.	
3. The Document Catalog page opens. Click Create.	

4. Enter Code (**PO**). 5. Enter Department Code. 6. Select the **Auto Numbering** checkbox. 7. Click Create.	**Document Catalog** Search ▼ **Document Identifier** Code : PO **4** Unit : Dept. : 18P **5** ID : ▼ **Other Options** Auto Numbering : ☑ **6** Create Template : ☐ Create **7** Menu
The PO document page opens to the Header, General Information tab. 8. Enter **Document Description**.	**Header** **General Information** Contract Details Reference Requestor Issuer Buyer M Document Name: Record Date: Budget FY: Fiscal Year: Period: Document Description: Desk for Laurie Andre. **8**
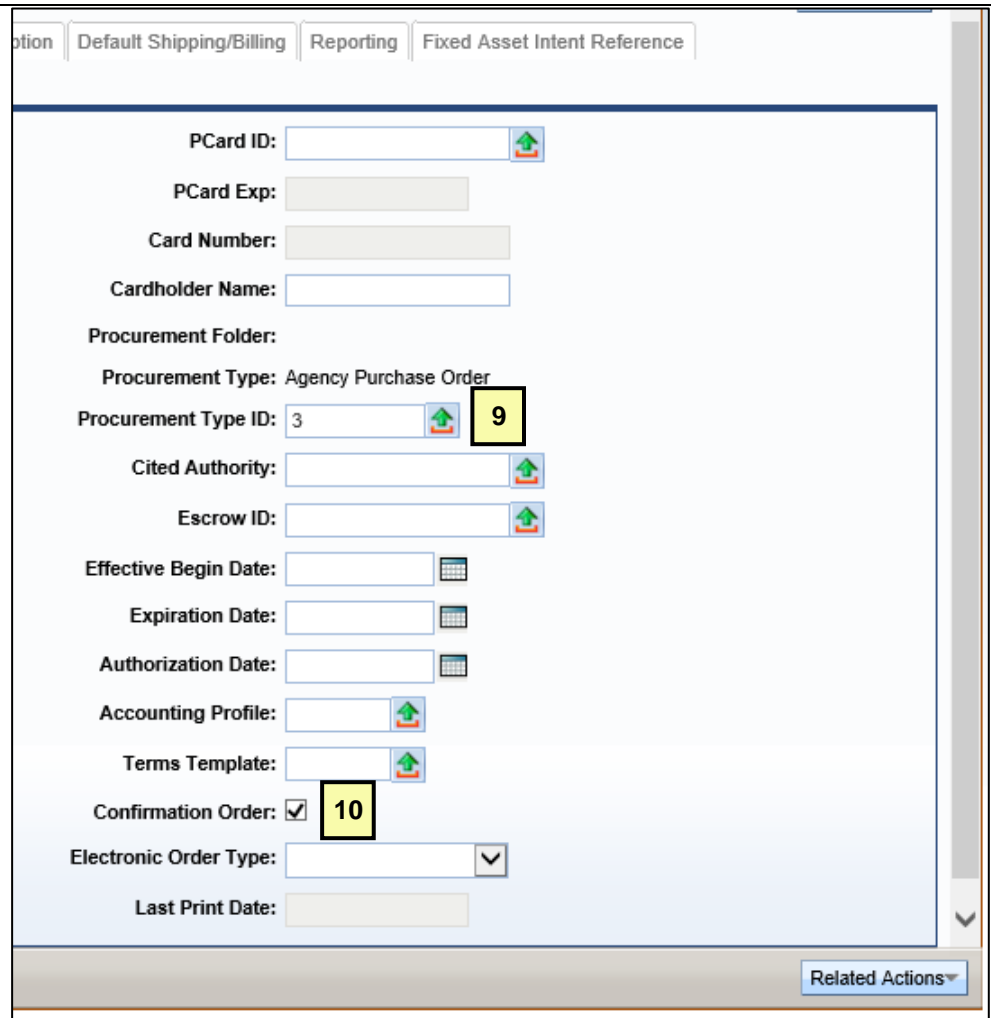
|	
9. Enter Procurement Type ID of 3. Note: if you click the pick list, you'll notice that "3" equals "Agency Purchase Order" **10.** Click the **Confirmation Order** if applicable. **11.** Click ![Save]	PCard ID: PCard Exp: Card Number: Cardholder Name: Procurement Folder: Procurement Type: Agency Purchase Order Procurement Type ID: 3 **9** Cited Authority: Escrow ID: Effective Begin Date: Expiration Date: Authorization Date: Accounting Profile: Terms Template: Confirmation Order: ☑ **10** Electronic Order Type: Last Print Date: Related Actions▾
12. Click on **Requester Issuer Buyer** tab at top of page. 13. Enter **Requester ID**. 14. Click ![Save]	**12** ntract Details | Reference | **Requestor Issuer Buyer** | Modif Issuer ID: Laurie LAURIE ANDRE 207-626-8446 laurie.a.andre@maine.gov Requestor ID: Laurie **13** Name: Laurie Andre Phone Number: 207-626-8446 Email: laurie.a.andre@maine.gov Requesting Dept:

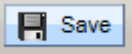|	
15. Click **Vendor** section from Navigation panel on left side of page**.**	**Document Navigator** ❌ Header Award Details Accounting Distribution Vendor **15** Commodity Accounting Posting Commodity T &C Business Type Sub Vendor Terms and Conditions Special Instructions
16. Enter **Vendor Customer** code. 17. Click 💾 Save Verify Address.	**Vendor** Discount Vendor Customer: VC0000215502 **16** ⬆ Legal Name: MICKEY MOUSE Alias/DBA: Address Code: AD002 ⬆ 555 MAIN ST ORLANDO FL 55555 US Vendor Preference Level: 99 Web Address http://:
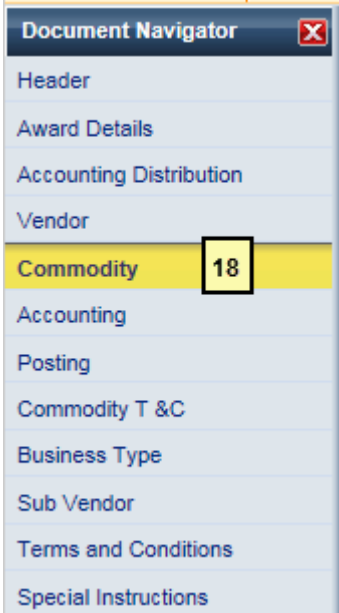
18. Click **Commodity** section from Navigation panel on left side of page**.**	
19. Click **Insert New Line**.	
20. Enter **Commodity** code or click the picklist to search.	

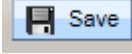|	
21. If selecting from picklist, enter **Name** of item purchasing. <u>Note</u>: use asterisk (*) as wildcard. 22. Click **Browse**. 23. Click **Select** next to commodity. 24. Click ![Save] .	**Choose** 22 Browse Clear Commodity : [ ] Class : [ ] Item : [ ] Group : [ ] Name : [*DESK*] 21 Active : [▾] **Commodity** — **Name** 23 Select 410 — Cabinets and Cases: Desktop Case Select 20453 — Microcomputers, Desktop or Tower Select 20488 — Scanners, Document: Handheld, De Select 20684 — Scanners, Document: Handheld, De Select 20720 — Braces: Monitor, PC's, CRT's, Desk Select 20839 — Desktop Publishing Select 20940 — Desktop Publishing Select 28548 — Lamps: Desk, Floor, and Table Select 41048 — Nurses' Desks and Accessories Select 42016 — Dormitory Furniture, Metal: Wardrob
25. Please confirm **Description** (will infer). 26. Enter **Quantity**. 27. Enter **Unit** or select from picklist. 28. Enter **Unit Price**. 29. Click ![Save]	**General Information** Reference Fixed Asset Intent Reference Shipping/Billing Specificat CL Description: [Cabinets and Cases: Desktop Cases, Tower Cases, Drive ▲▼] 25 Warehouse: [ ] ⬆ Commodity: [20410] ⬆ Stock Item Suffix: [ ] ⬆ Cabinets and Cases: Desktop Cases, Tower Cases, Dri Supplier Part Number: [ ] ⬆ Line Type: [Item ▾] Quantity: [1.00000] 26 Unit: [EA] 27 ⬆ Unit Price: [$450.00] 28 Discounted Unit Price: [$450.00] List Price: [$0.00] Contract Amount: [$0.00]
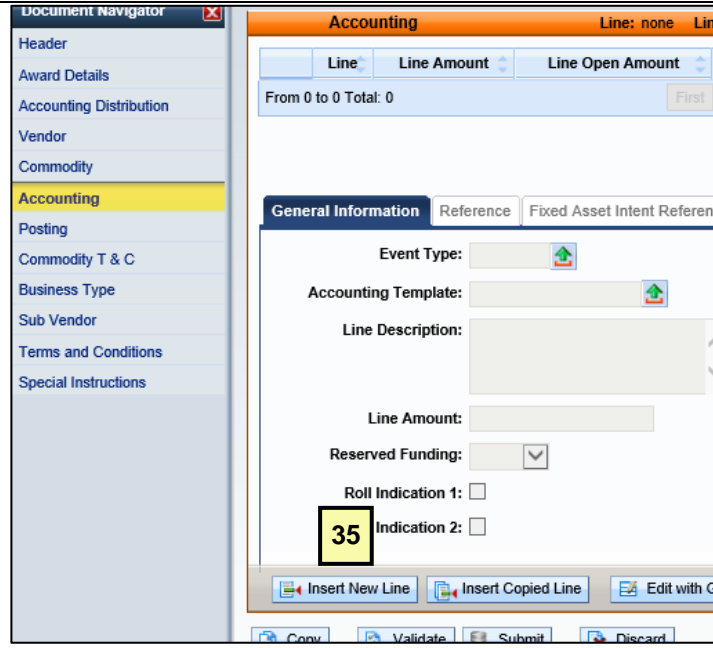
30. Select Shipping/Billing tab. 31. Enter **Shipping Location** or select from picklist. 32. Enter **Billing Location** or select from picklist. 33. Click ![Save]	*[screenshot of Shipping/Billing tab showing Shipping Location: 18P01 – Division of Purchases, Burton Cross Office Bldg, 4th Floor; Billing Location: 18P02 – Division of Purchases, 9 State House Station, Augusta]*
34. Select **Accounting** section from Navigation panel on left side of page**.**	*[Document Navigator panel: Header, Award Details, Accounting Distribution, Vendor, Commodity, Accounting (highlighted, 34), Posting, Commodity T &C, Business Type, Sub Vendor, Terms and Conditions, Special Instructions]*
35. Click **Insert New Line**.	*[Accounting screen with General Information tab showing Event Type, Accounting Template, Line Description, Line Amount, Reserved Funding, Roll Indication 1, Indication 2; buttons: Insert New Line (35), Insert Copied Line, Edit with G...]*

36. Enter the **Line Amount**. 37. Click **Fund Accounting.** **NOTE:** The **Event Type** field determines the type of accounting transaction that is performed when the Purchase Order submits. Agency Purchase Orders always default to PR07, which is a non-encumbering event type.	
38. Enter the following information: a. Fund b. Dept c. Unit d. Sub-Unit e. Object (or BSA - Fleet, Ferry, STAR and Facilities ONLY) **NOTE:** Advantage does not validate the accounting elements being recorded in this section. Validation does not occur until the lines have been distributed to the Commodity lines. 39. Click **Validate** 40. Click **Submit.**	