# Contract Reassignment & Cloning POs from Other Orgs

A contract may be reassigned for several reasons. Some reasons for reassignment include a change to a vendor's tax ID number or mistake in the vendor record, technical issues with the document, or transfer of the contact's administration to another organization, to name a few.

**NOTE:** You cannot clone release POs from the PO. You will need to clone the requisition instead.

## Contract Reassignment

Create new PO and add items from existing contract to be reassigned <u>OR</u> if the buyer is staying the same or staying in the same ProcureAZ Organization, then the original PO can be cloned by clicking the available "Clone PO" button on the bottom of the Summary page without having to create a new PO from scratch.

<u>To create a new PO and add items from the original PO:</u>

1.  In the Document drop-down menu select PO → New.
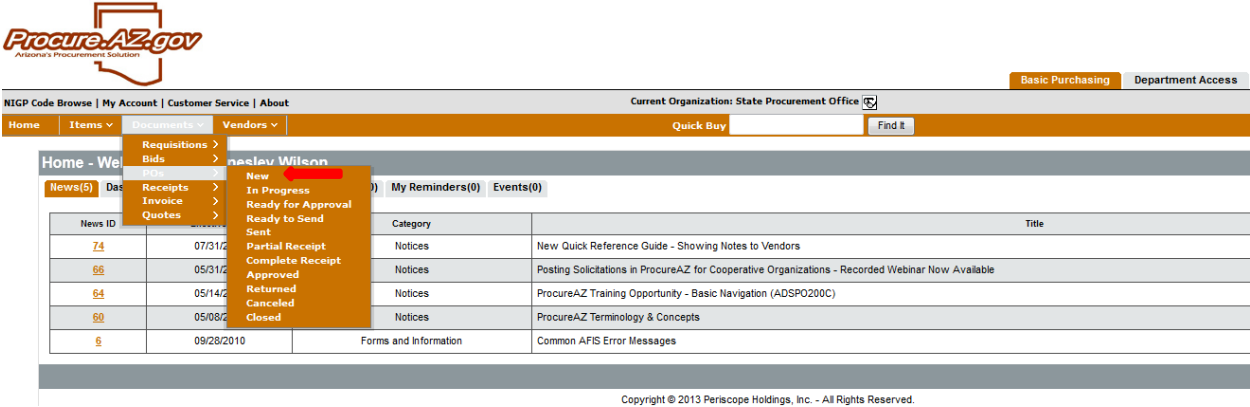


2.  Create a fresh PO and select the PO Type from the drop-down menu.



3.  Continue on with instructions for selection **a**, **b**, or **c** as appropriate for your situation.

   a.  **Create a PO from scratch** – the original PO was NOT created by you and/or was created in another Organization and you have Basic Purchasing rights;

   b.  **Clone a PO from another PO** – the original PO was created by you and you have Basic Purchasing rights;

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C. **Create a PO from requisitions** – the original PO was NOT created by you and/or was created in another Organization and you have Basic Purchasing rights or you created the requisition and you have Department Access rights.

## Create a PO from scratch

**3a.** After completing the General tab move to the Items tab and click Search Items to query for the items on the existing contract for reassignment.



**4a.** A search screen will allow you to search by the PO/contract number.

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# Contract Reassignment & Cloning POs from Other Orgs

**5a.** Check the boxes next to all the items to be included on the reassigned contract. (Note: Checking the "Select" button at the column head will capture every item on all item page results.)



**6a.** Complete Remaining Tabs of New PO…



**7a.** Cancel current contract once all items have been added by creating a Change Order on which the Contract End Date is shortened in the Control Tab.



**8a.** On the Summary tab, provide instruction on how to locate the new contract in the Comments section of the Change Order and Submit for Approval.

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# *Contract Reassignment &*
# *Cloning POs from Other Orgs*



**9a.** Send new PO.

## Clone a PO from another PO

**3b.** Locate the PO you wish to clone by using your home screen tabs, the drop-down Documents menu, or by utilizing the Advanced Search feature.

Method#1: Document drop-down.

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*Contract Reassignment &*
*Cloning POs from Other Orgs*

Method#2: Advanced Search.



**4b.** Open the PO by clicking on the PO number displayed in the Results.



5b. Proceed to the Summary tab of the PO.

**4b.** View the PO by clicking the PO number in the Results.



**5b.** Scroll to the bottom of the Summary tab in the PO and select "Clone PO".



**6b.** The screen will update to display the General tab of your In Progress PO that you have just cloned.

**7b.** Work through the tabs of your cloned PO from left to right making certain that the information is correct. Make any necessary changes.



**8b.** Submit for Approval from the Summary tab of the PO <u>or</u> continue to Clone PO before submitting for approval. This is a time-saving feature allowing set up of multiple POs for repeat orders.

## Create a PO from requisitions

3c. Locate the PO you wish to clone by using your home screen tabs, the drop-down Documents menu, or by utilizing the Advanced Search feature.



4c. View the PO by clicking the PO number.

5c. The PO will open to display the Summary page. Scroll to the bottom of the Summary page and select "Clone Requisition" to clone the PO.



6c. The cloned PO will now display for you to make any necessary changes. Submit for approval in the Summary tab.

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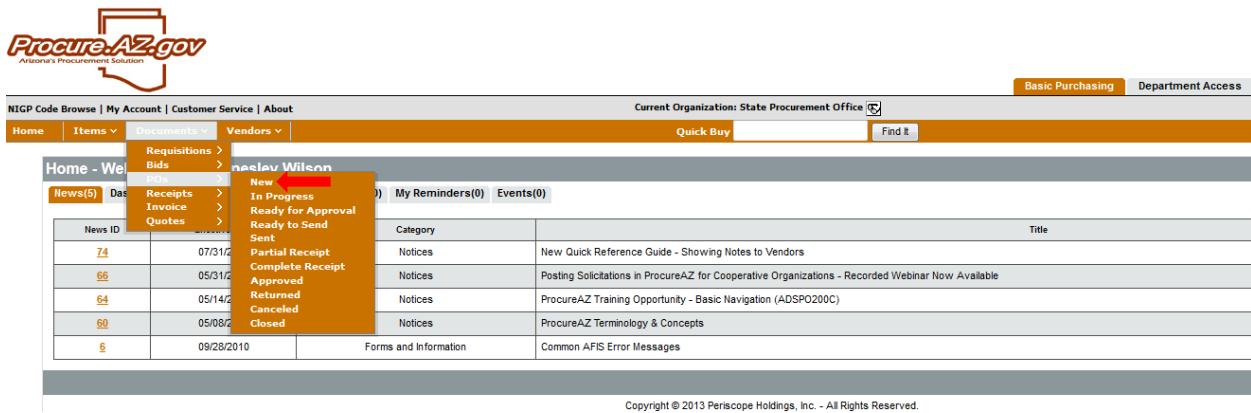*Arizona's Procurement Solution*

# Contract Reassignment & Cloning POs from Other Orgs

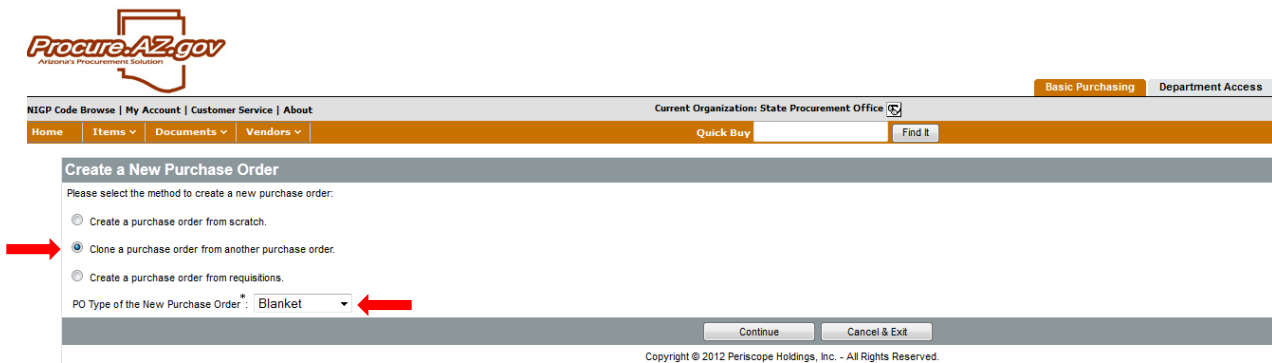## Cloning POs from Other Orgs

1. Select the Basic Purchasing role tab.



2. Go to the Documents drop-down menu and select Purchase Orders → New.



3. In the next screen, select the option to clone a purchase order from another purchase order and choose the PO type of the new purchase order from the drop-down menu provided.



4. Search for the PO number you wish to clone.

5.  Click the radio button in the Select column next to the PO you wish to clone. Then select either the Clone PO & Exit button or the Clone PO & Add More Items button at the bottom of the Results.



6.  Once you have cloned the PO and made any additions or adjustments you will need to Submit for Approval as usual. <u>The old PO can be canceled by setting the expiration date for the day you would like it to expire.</u> DO NOT just Cancel the PO. Also, set the begin date for the new contract for the same day/time as the expiration of the old contract so there is overlap.