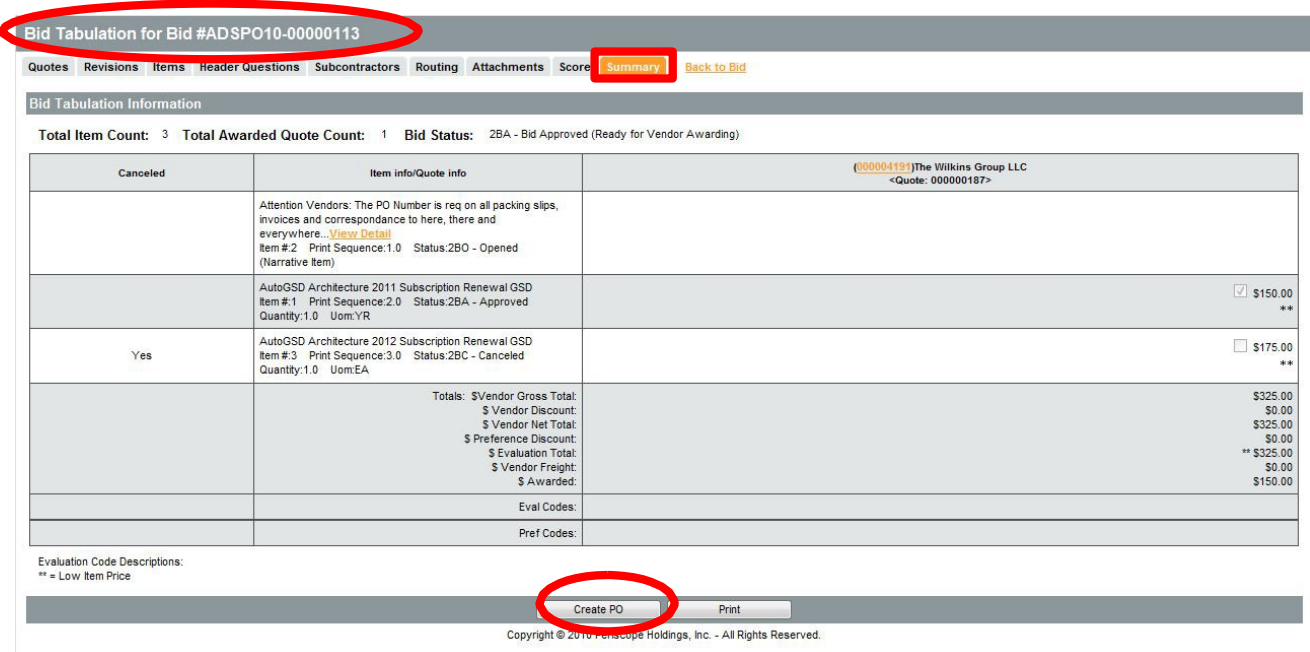


## Creating Contracts

The State of Arizona manages term contract agreements within ProcureAZ through the use of the Blanket Purchase Order (PO) document. This guide walks you through the four different ways users with the Basic Purchasing (BP) role can create a PO within ProcureAZ. For term agreements, ensure “Blanket” has been selected for your PO in the **Purchase Order Type** field on the General tab.

### Converting a Bid Award

If your contract is the result of a solicitation that was conducted within ProcureAZ, you can convert the solicitation award into a contract via the Bid document you used to conduct the solicitation. Once your Bid award recommendation has been approved, from the Summary tab of the corresponding Bid Tab you are able to create the resulting PO(s) by clicking the **Create PO** button on the bottom of the screen.



**Bid Tabulation for Bid #ADSP010-00000113**

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score **Summary** Back to Bid

**Bid Tabulation Information**

Total Item Count: 3 Total Awarded Quote Count: 1 Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)

Canceled	Item info/Quote info	
	Attention Vendors: The PO Number is req on all packing slips, invoices and correspondence to here, there and everywhere... <a href="#">View Detail</a> Item #2 Print Sequence:1.0 Status:2B0 - Opened (Narrative Item)	(00000418)The Wilkins Group LLC <Quote: 000000187>
	AutoGSD Architecture 2011 Subscription Renewal GSD Item #1 Print Sequence:2.0 Status:2BA - Approved Quantity:1.0 Uom:YR	<input checked="" type="checkbox"/> \$150.00 **
Yes	AutoGSD Architecture 2012 Subscription Renewal GSD Item #3 Print Sequence:3.0 Status:2BC - Canceled Quantity:1.0 Uom:EA	<input type="checkbox"/> \$175.00 **
Totals: \$Vendor Gross Total:		\$325.00
\$ Vendor Discount:		\$0.00
\$ Vendor Net Total:		\$325.00
\$ Preference Discount:		\$0.00
\$ Evaluation Total:		** \$325.00
\$ Vendor Freight:		\$0.00
\$ Awarded:		\$150.00
Eval Codes:		
Pref Codes:		

Evaluation Code Descriptions:  
\*\* = Low Item Price

**Create PO** Print

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Upon selecting **Create PO**, the **Purchase Order Creation Preview** screen will appear for the Bid that was awarded. A list of the vendor Quotes that were awarded will appear. A different PO will be created for each different vendor that was awarded at least one Bid item. Below, a list of **Purchase order creation options** appears. These options, when checked, will bring information from either the Bid, or the vendors' Quotes to their corresponding PO. These options are all automatically checked. Note that you will be able to edit the resulting PO as needed after you've created it, including being able to delete any of this information that is brought over from the Bid.

Once you're ready to create the PO(s), click the **Continue** button. Doing so will display a screen listing the POs that were created. Click a link in the **PO#** field to view that PO. Clicking **OK** at the bottom of the screen will return you to your Homepage.

# Creating Contracts

## Bid ADSPO10-00000113 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name	Total Awarded
000000187	000004191	The Wilkins Group LLC	\$150.00

Purchase order creation options:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

### Open Market Bid ADSPO10-00000113 - Purchase Order(s) Created

Status: 2BPO - Bid to PO

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total	Date Created	Status
ADSP010-000199	000004191	The Wilkins Group LLC	\$150.00	05/10/2010	3PI - In Progress

## Cloning a Previous Document

Another method for creating new POs is to clone an older PO or Requisition. Cloning a document makes a new copy of the document, enabling you to leverage the information that was already entered on the original, but giving you the ability to edit anything where necessary.

To search for a Requisition or PO to clone, use the **Documents** dropdown in the colored Navigation Bar along the top of the screen. Within the dropdown, hover your mouse over **POs**, then select **New** to display the **Create a New Purchase Order** screen. Select either **Clone a purchase order from another purchase order** or **Create a purchase order from requisitions**, then select the **PO Type of the New Purchase Order** from within the dropdown box and click **Continue** to proceed with searching for the PO or Requisition to clone.

Home | Items | Documents | Vendors

- Requisitions
- Bids
- POs
- Receipts
- Invoice
- Quotes

Create a New Purchase Order

Please select the method to create a new purchase order:

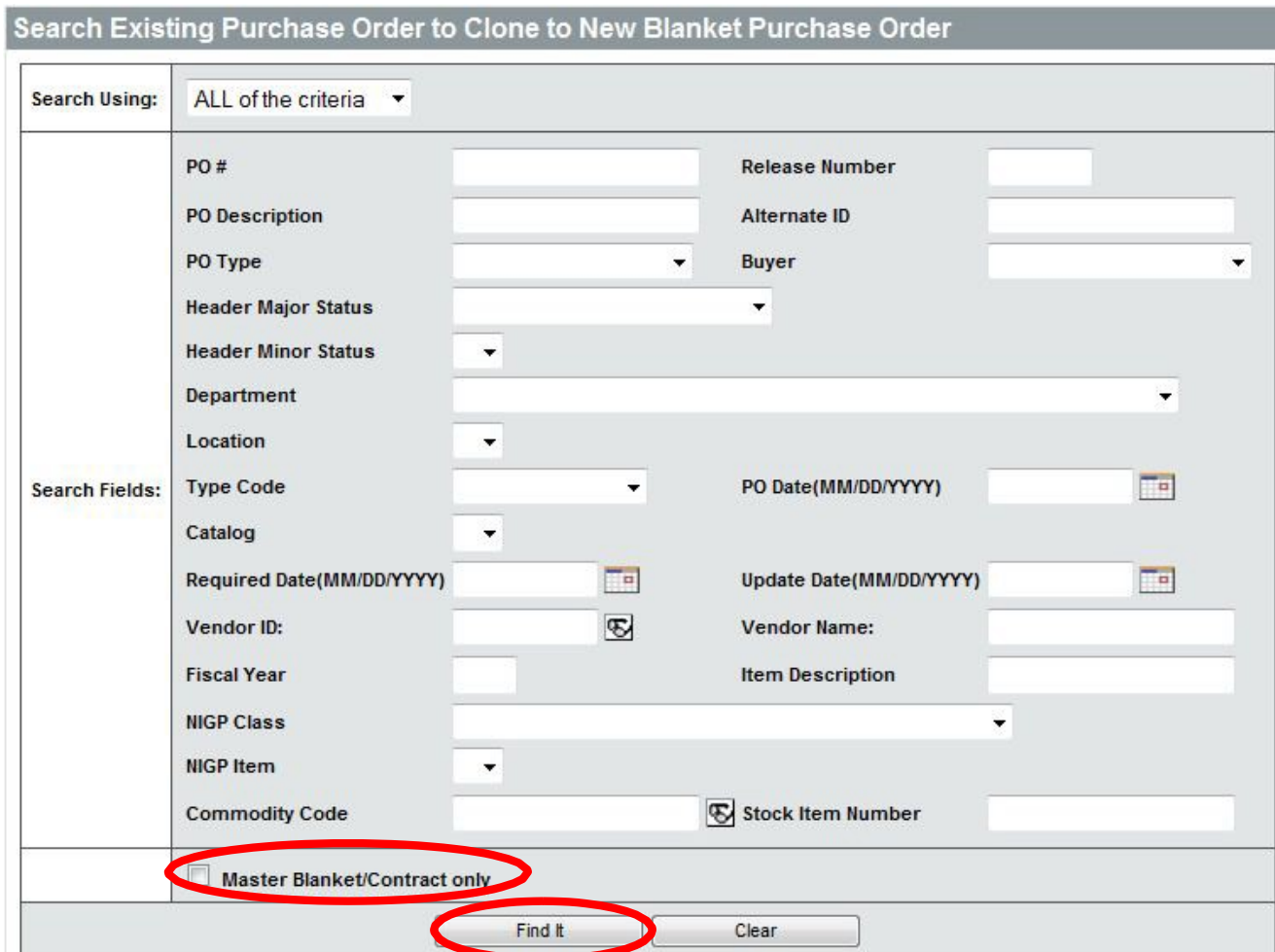
- Create a purchase order from scratch.
- Clone a purchase order from another purchase order.
- Create a purchase order from requisitions.

PO Type of the New Purchase Order :

## Creating Contracts

Upon selecting **Clone a purchase order from another purchase order**, you will be shown the **Search Existing Purchase Order to Clone to New Blanket Purchase Order** screen. The search feature here functions identically to the **Advanced Search** feature outlined in the **Advanced Navigation** training – enter your search criteria and click **Find It** to return matching results below.

Selecting the **Master Blanket/Contract only** check box on the bottom of the search screen will return only Blanket and Contract POs as results for your search. Note that the terms “Blanket” and “Master Blanket” are used interchangeably throughout the system.



**Search Existing Purchase Order to Clone to New Blanket Purchase Order**

Search Using: ALL of the criteria

Search Fields:

PO #	<input type="text"/>	Release Number	<input type="text"/>
PO Description	<input type="text"/>	Alternate ID	<input type="text"/>
PO Type	<input type="text"/>	Buyer	<input type="text"/>
Header Major Status	<input type="text"/>		
Header Minor Status	<input type="text"/>		
Department	<input type="text"/>		
Location	<input type="text"/>		
Type Code	<input type="text"/>	PO Date(MM/DD/YYYY)	<input type="text"/>
Catalog	<input type="text"/>		
Required Date(MM/DD/YYYY)	<input type="text"/>	Update Date(MM/DD/YYYY)	<input type="text"/>
Vendor ID:	<input type="text"/>	Vendor Name:	<input type="text"/>
Fiscal Year	<input type="text"/>	Item Description	<input type="text"/>
NIGP Class	<input type="text"/>		
NIGP Item	<input type="text"/>		
Commodity Code	<input type="text"/>	Stock Item Number	<input type="text"/>

Master Blanket/Contract only

Any older PO can also be cloned by accessing it and clicking the **Clone Bid** button along the bottom of the Summary tab. Note that new Blanket POs will usually only be created following a solicitation for the goods/services that are to be awarded.

## Creating Contracts

Approval Path:

Delete	Approver	Order Sequence	Approval Path ID	Level	Approver Type	Date Requested	Date Approved/Disapproved	Approved/Disapproved/Canceled by	Comment View
There are no approval paths found for this Purchase Order.									

### Converting a Requisition

Another method of creating new POs is to convert an approved Open Market Requisition. Converting a Requisition into a PO brings all the information entered on the Requisition over to the PO, potentially limiting the amount of setup that is required. Open Market Requisitions are requests for goods or services that are not on-contract. Once approved, a BP user is notified that the Requisition is "Ready for Purchasing" to determine if a solicitation is required for the desired items, or if the items can be awarded to a vendor without competition.

The Summary tab of Requisitions in "Ready for Purchasing" status contains buttons along the bottom allowing a BP user to convert the Requisition into either a Bid or PO. The BP user can also disapprove the Requisition, sending it back to the creator to correct and re-submit for approval. Note that unless the creator of the Requisition conducted an RFQ, you will likely need to conduct a solicitation before awarding a term contract by creating a Blanket PO.

**Open Market Requisition ADSP010-00000304** Status: 1RRP - Ready for Purchasing

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

Overall Validation Warnings

- Item # 1: No vendor, and there is no recommended vendor at header level.

Header Information

<b>Requisition Number:</b>	ADSP010-00000304	<b>Short Description:</b>	test	<b>Status:</b>	1RRP - Ready for Purchasing
<b>Department:</b>	ABA - Accountancy Board	<b>Location:</b>	ABA - Accountancy Board	<b>Required By Date:</b>	
<b>Entered Date:</b>	02/04/2010	<b>Requisition Type:</b>	Open Market	<b>Type Code:</b>	
<b>Requestor:</b>	Chris Harris	<b>Purchaser:</b>	System Administrator	<b>Fiscal Year:</b>	2010
<b>Contact:</b>	Chris Harris	<b>Contact Phone:</b>	(555)555-5555	<b>Alternate ID:</b>	
<b>Estimated Cost:</b>	\$10.00	<b>Print Format:</b>	Requisition		

Approval Actions

Options:  Disapprove

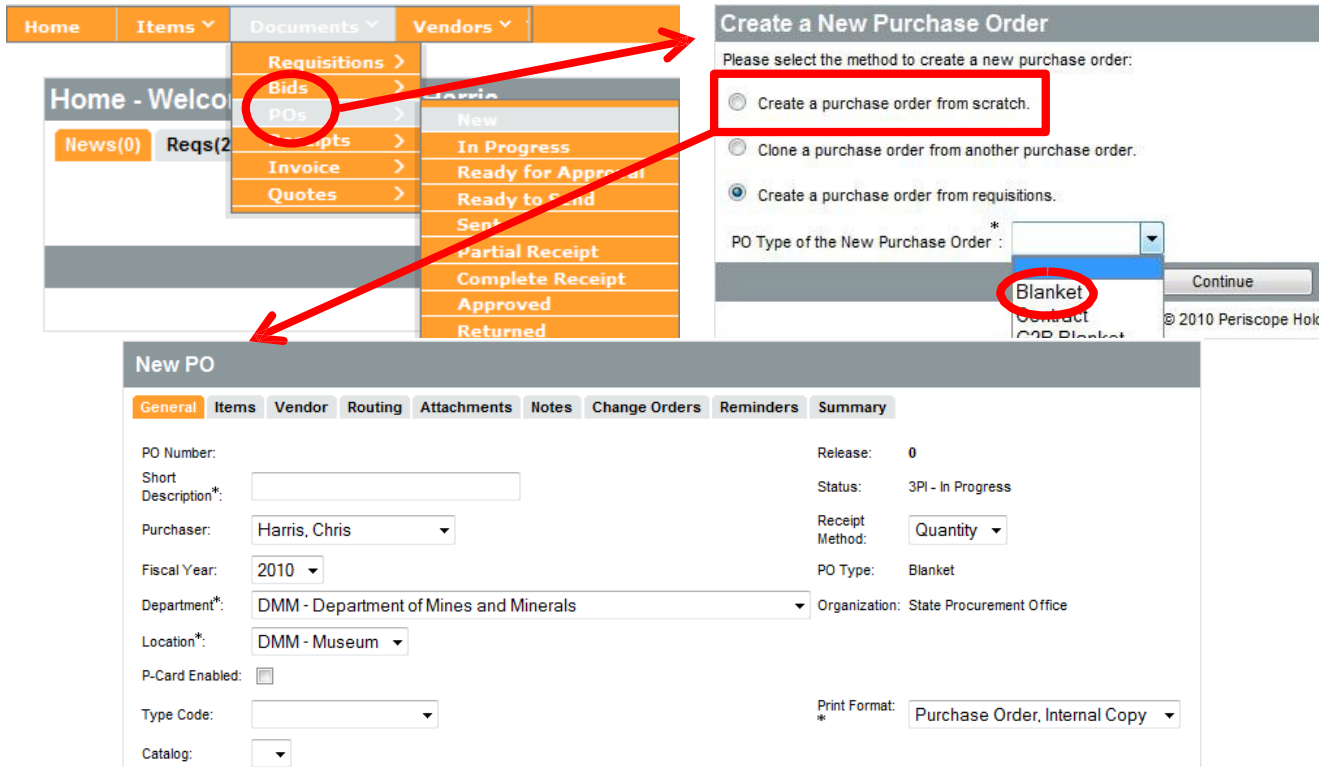
Comment:

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## Creating Contracts

### Create a New Purchase Order from Scratch

To create a blank new Blanket Purchase Order that you will have to complete, use the **Documents** dropdown in the colored Navigation Bar along the top of the screen. Hover over POs and select **New**, which displays the **Create a New Purchase Order** screen. Click the radio button next to **Create a purchase order from scratch**, select "Blanket" from the **PO Type of the New Purchase Order** dropdown box and click **Continue**. The General tab of your blank new PO document will display.



The screenshot illustrates the process of creating a new purchase order. In the top navigation bar, the 'Documents' dropdown menu is open, and the 'POs' option is selected, leading to a sub-menu where 'New' is highlighted. A red circle highlights the 'New' option, and a red arrow points to the 'Create a New Purchase Order' screen. On this screen, the radio button for 'Create a purchase order from scratch' is selected and circled in red. Below this, the 'PO Type of the New Purchase Order' dropdown menu is open, and 'Blanket' is selected and circled in red. A 'Continue' button is visible to the right. Below the 'Create a New Purchase Order' screen, the 'New PO' form is shown with the 'General' tab selected. The form contains various fields for creating a new purchase order, including PO Number, Short Description, Purchaser (Harris, Chris), Fiscal Year (2010), Department (DMM - Department of Mines and Minerals), Location (DMM - Museum), P-Card Enabled (checkbox), Type Code, Catalog, Release (0), Status (3PI - In Progress), Receipt Method (Quantity), PO Type (Blanket), Organization (State Procurement Office), and Print Format (Purchase Order, Internal Copy).

Unlike cloned documents, new documents are not immediately assigned a number, meaning that they are not established documents that permit you to leave and access them later. In order to have a number assigned and be able to access the document later, you must first complete the required fields on the General tab and save.