

Professional Services Purchase Orders Overview

According to the Agency Procurement and Surplus Property Manual, published by the Department of General Services, “Professional Services as defined in § 2.2-4301 of the Virginia Public Procurement Act (VPPA) means work performed by an independent contractor within the scope of the practice of accounting, actuarial services, architecture, land surveying, landscape architecture, law, dentistry, medicine, optometry, pharmacy, professional engineering, and the services of an economist procured by the State Corporation Commission.”

Cardinal tracks professional services expenditures against contracts using a purchase order (PO), and subsequent task orders (i.e., change order), as a means to manage contract activities. This process allows for easy reference and reporting.

POs, as well as subsequent task orders, are sent electronically through Virginia’s online electronic procurement system (eVA) to the supplier to confirm orders. The following is a typical scenario used to create a Professional Services PO and add a task order related to a contract.

For more detailed instructions on creating and managing POs, please refer to the course entitled **PR344: Processing Purchase Orders**, located on the Cardinal website in **Course Materials** under **Learning** and the job aid entitled **PR344: Purchase Orders**, located on the Cardinal website in **Job Aids** under **Learning**.

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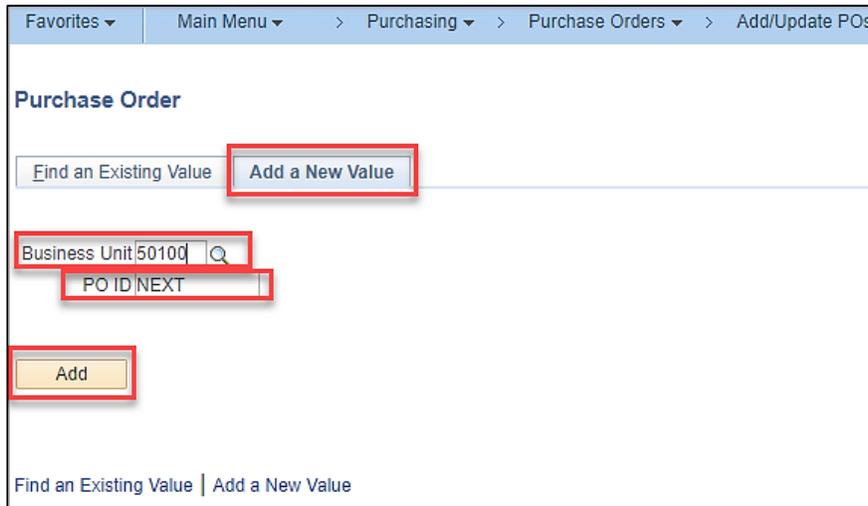
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Create Professional Services Purchase Order from a Contract

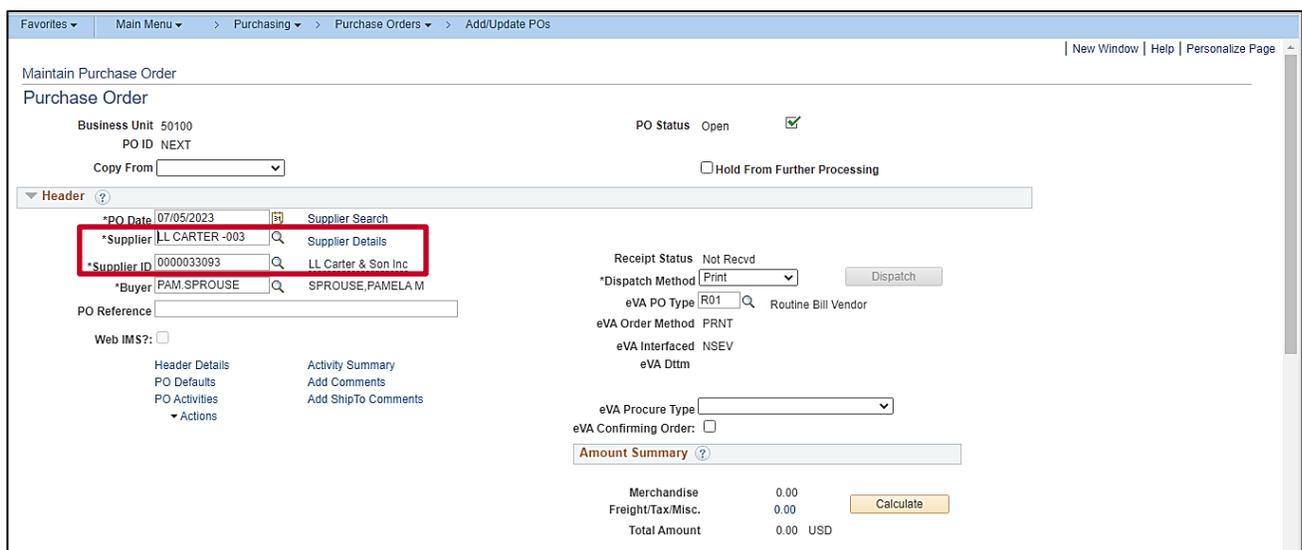
The PO is the principal tracking document and represents all activity related to the contract. In order to limit eVA fees, for each Professional Services contract, you would create only one PO. **Line 1** of the PO should be equal to the value of the contract. Each subsequent line added to the PO is deemed a task order (i.e., change order) executed against the contract. As each task order is added to the PO, **Line 1** of the PO is decremented for the same amount as the task order. As a result, the sum of the Professional Services PO lines is always equal to the contract. In the example below, you will create a Professional Services PO and subsequent task order against an existing contract.

PR344_Professional Services Purchase Orders (VDOT)

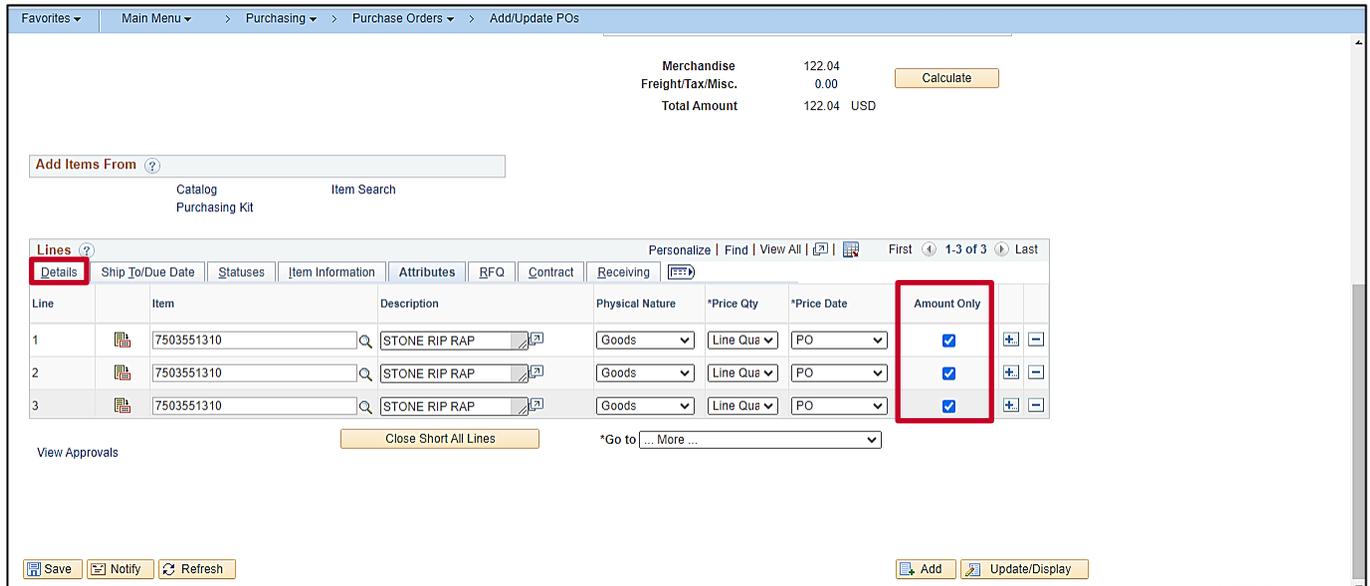
1. To create the PO using the Professional Services contract, navigate to the **Purchase Order** search page using the following path:
2. Main Menu > Purchasing > Purchase Orders > Add/Update POs



3. Select the **Add a New Value** tab:
4. Business Unit: 50100
5. **PO ID: NEXT** and should not be changed. Cardinal assigns a **PO ID** number when you successfully save the PO.
6. Click the Add button. The Maintain Purchase Order – Purchase Order page displays.



7. Enter the supplier by **Supplier** (name) or **Supplier ID (0000063388)** for your contract. You must enter the supplier in order to narrow down the contracts you may copy from in the next step.



Merchandise 122.04
 Freight/Tax/Misc. 0.00
 Total Amount 122.04 USD

Add Items From ?

Catalog Purchasing Kit

Lines ?

Personalize | Find | View All | First 1-3 of 3 Last

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

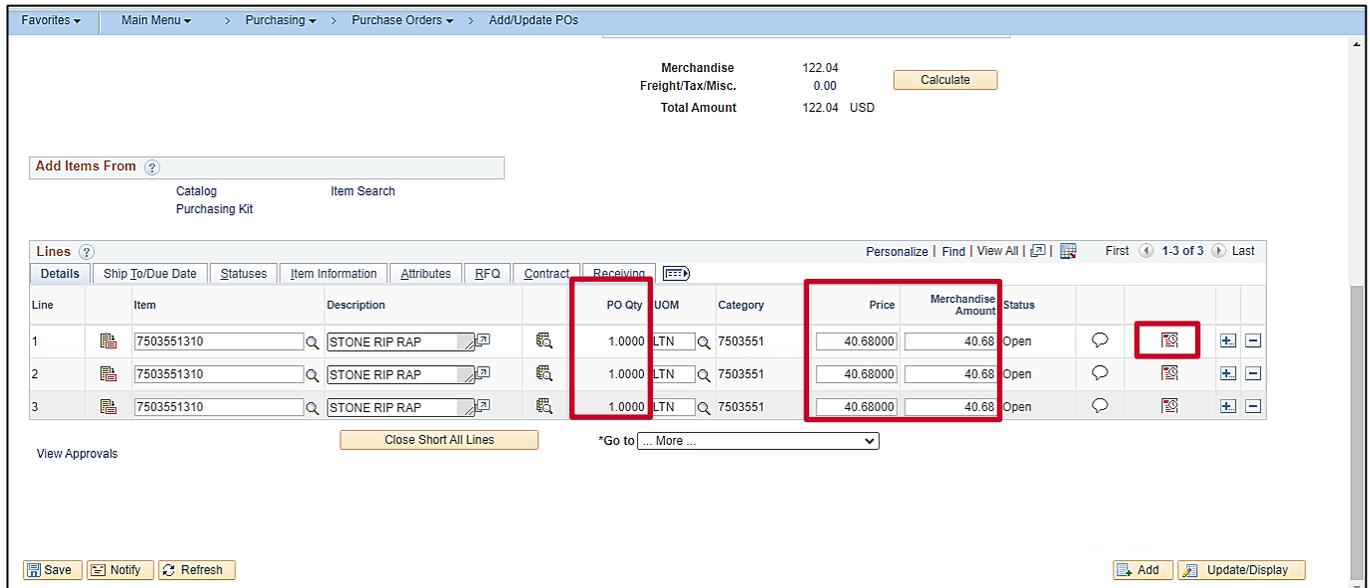
Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only
1	7503551310	STONE RIP RAP	Goods	Line Qua	PO	<input checked="" type="checkbox"/>
2	7503551310	STONE RIP RAP	Goods	Line Qua	PO	<input checked="" type="checkbox"/>
3	7503551310	STONE RIP RAP	Goods	Line Qua	PO	<input checked="" type="checkbox"/>

View Approvals

Close Short All Lines *Go to ... More ...

Save Notify Refresh Add Update/Display

14. Check the **Amount Only** check-box.
15. Click the **Details** tab.



Merchandise 122.04
 Freight/Tax/Misc. 0.00
 Total Amount 122.04 USD

Add Items From ?

Catalog Purchasing Kit

Lines ?

Personalize | Find | View All | First 1-3 of 3 Last

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

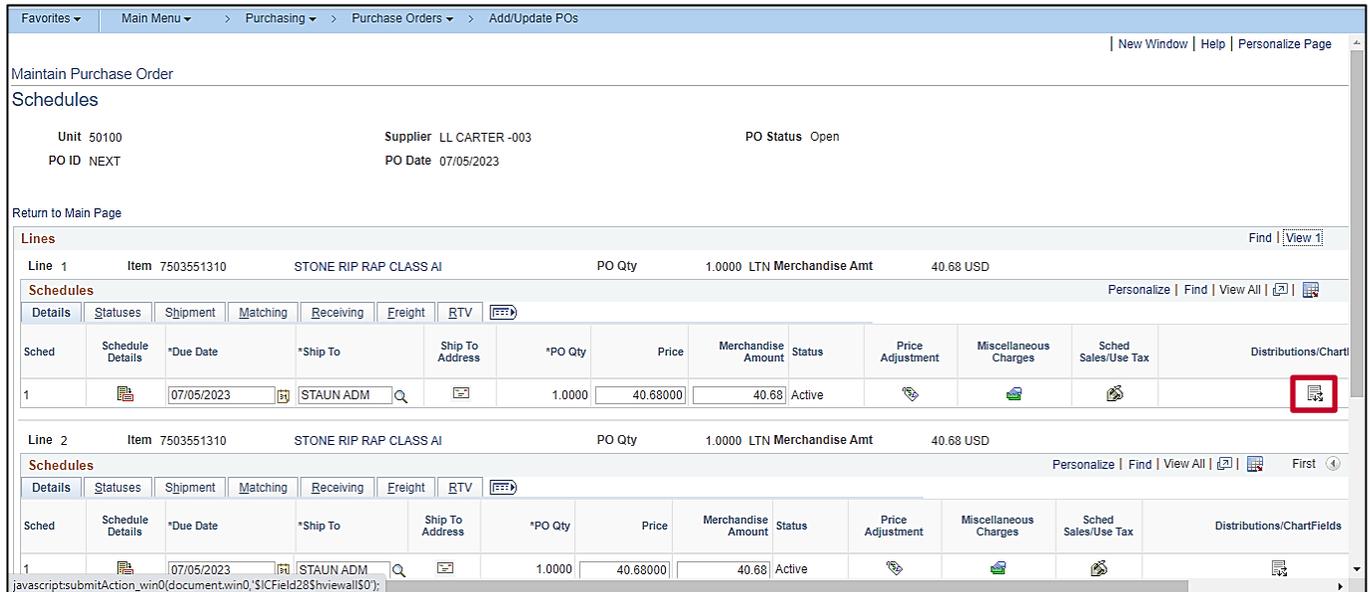
Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	7503551310	STONE RIP RAP	1.0000	LTN	7503551	40.68000	40.68	Open
2	7503551310	STONE RIP RAP	1.0000	LTN	7503551	40.68000	40.68	Open
3	7503551310	STONE RIP RAP	1.0000	LTN	7503551	40.68000	40.68	Open

View Approvals

Close Short All Lines *Go to ... More ...

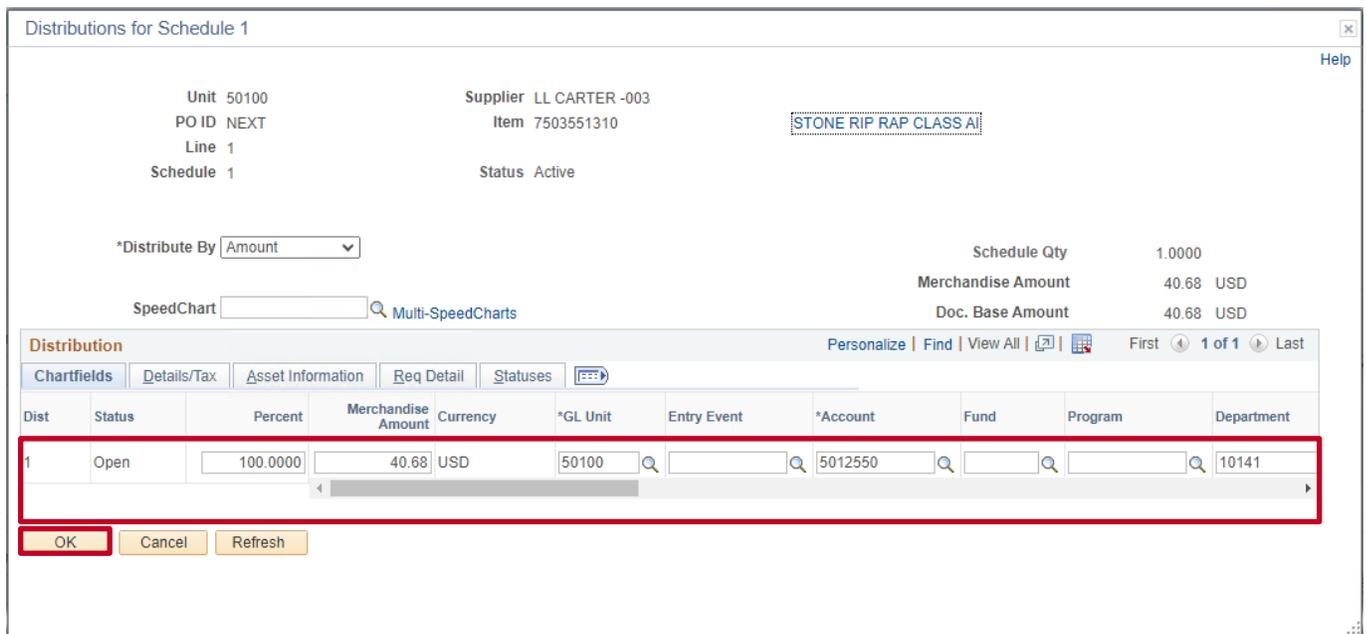
Save Notify Refresh Add Update/Display

16. The **PO Qty** value is **1** and cannot be changed.
17. Update the **Price** to match the total contract value.
18. Click the Schedule icon. The Maintain Purchase Order – Schedules page displays.



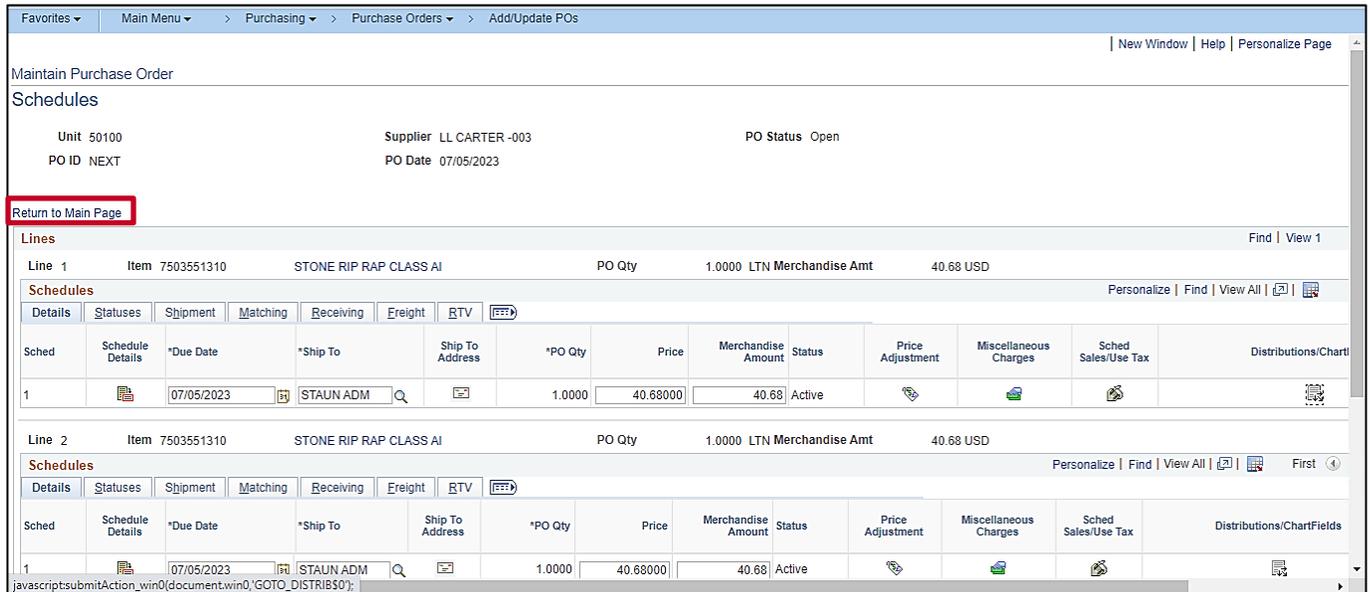
19. Values default in as shown. Change as necessary.

20. Click the Distribution icon. The Maintain Purchase Order – Distributions for Schedule X pop-up window displays.



21. Enter a valid accounting distribution (i.e., chart of accounts values). In this case, you might enter administrative chart of accounts values since this is not project specific at this time. When the task orders are subsequently created, you will enter the specific project chart of accounts values.

22. Click the **OK** button. The **Maintain Purchase Order – Schedules** page displays.



Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs
 New Window | Help | Personalize Page

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Open
 PO ID NEXT PO Date 07/05/2023

Return to Main Page

Lines Find | View 1

Line	Item	STONE RIP RAP CLASS AI	PO Qty	1.0000	LTN Merchandise Amt	40.68 USD						
Schedules Personalize Find View All [2] [3]												
Details Statuses Shipment Matching Receiving Freight RTV [FFFD]												
Sched	Schedule Details	*Due Date	*Ship To	Ship To Address	*PO Qty	Price	Merchandise Amount	Status	Price Adjustment	Miscellaneous Charges	Sched Sales/Use Tax	Distributions/Chart
1		07/05/2023	STAUN ADM		1.0000	40.68000	40.68	Active				

Line 2 Item 7503551310 STONE RIP RAP CLASS AI PO Qty 1.0000 LTN Merchandise Amt 40.68 USD

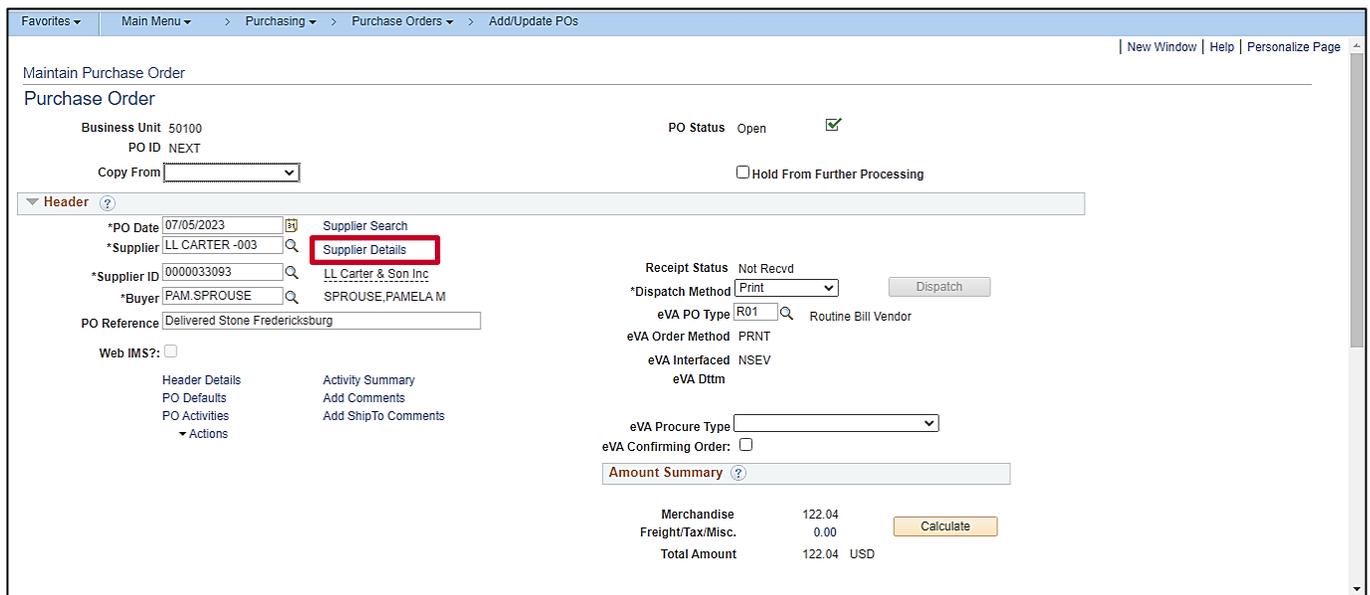
Schedules Personalize | Find | View All | [2] | [3] | First
 Details | Statuses | Shipment | Matching | Receiving | Freight | RTV | [FFFD]

Sched Schedule Details *Due Date *Ship To Ship To Address *PO Qty Price Merchandise Amount Status Price Adjustment Miscellaneous Charges Sched Sales/Use Tax Distributions/ChartFields

1 [icon] 07/05/2023 [FR] STAUN ADM [Q] [icon] 1.0000 40.68000 40.68 Active [icon] [icon] [icon] [icon]

javascript:submitAction_win0(document.win0,'GOTO_DISTRISS0');

23. Click the Return to Main Page hyperlink. The Maintain Purchase Order – Purchase Order page displays.



Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs
 New Window | Help | Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO Status Open
 PO ID NEXT

Copy From Hold From Further Processing

▼ Header ?

*PO Date 07/05/2023 [B] Supplier Search
 *Supplier LL CARTER -003 [Q] **Supplier Details**
 *Supplier ID 0000033093 [Q] LL Carter & Son Inc
 *Buyer PAM.SPROUSE [Q] SPROUSE,PAMELA M

PO Reference Delivered Stone Fredericksburg

Web IMS?:

Header Details Activity Summary
 PO Defaults Add Comments
 PO Activities Add ShipTo Comments
 ▼ Actions

Receipt Status Not Recvd
 *Dispatch Method [Print] [Dispatch]
 eVA PO Type R01 [Q] Routine Bill Vendor
 eVA Order Method PRNT
 eVA Interfaced NSEV
 eVA Dttm

eVA Procure Type

eVA Confirming Order:

Amount Summary ?

Merchandise	122.04	
Freight/Tax/Misc.	0.00	<input type="button" value="Calculate"/>
Total Amount	122.04 USD	

24. Click the Supplier Details hyperlink. The Maintain Purchase Order – Supplier Details – XXX pop-up window displays.

PO Supplier Information
Help

Maintain Purchase Order

Supplier Details -- LL Carter & Son Inc

Business Unit 50100 PO ID NEXT

***Location**

*Address

Contact

Salesperson

Supplier LL CARTER -003

Supplier Information

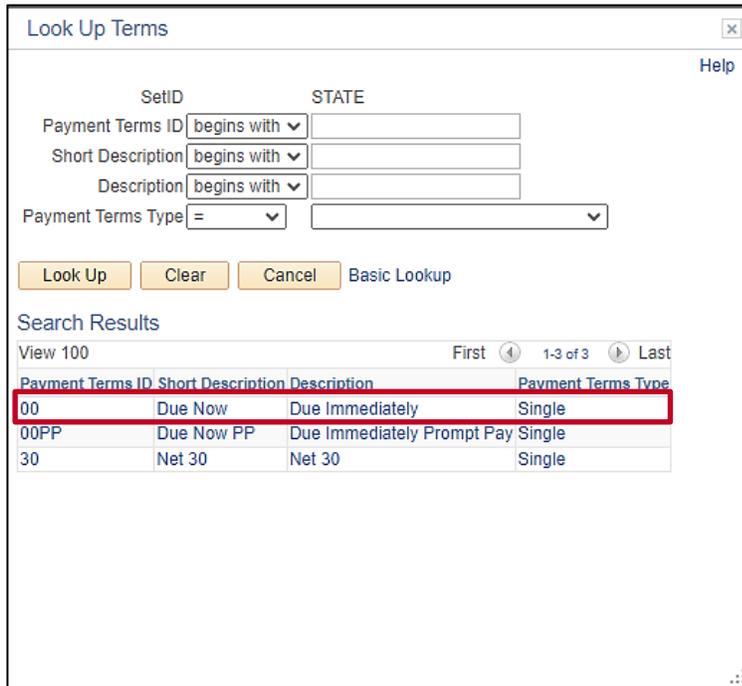
Terms Net 30

Basis Date Type

Supplier Details Message

Country USA United States	Prefix
Address 1 17460 Countyline Church Road	Fax 718/494-3856
Address 2	Prefix 1
eVA VLIN VA10051504	Phone 584/710-1869
eVA Address ID EVAAD227788	
City Ruther Glen	
County 077946325	Postal 22546
State VA Virginia	

25. The **Address** defaults. Using the lookup icon, you may change the **Address**, if necessary.
26. Click the **Terms** lookup magnifying glass.



Look Up Terms

SetID STATE

Payment Terms ID begins with []

Short Description begins with []

Description begins with []

Payment Terms Type = []

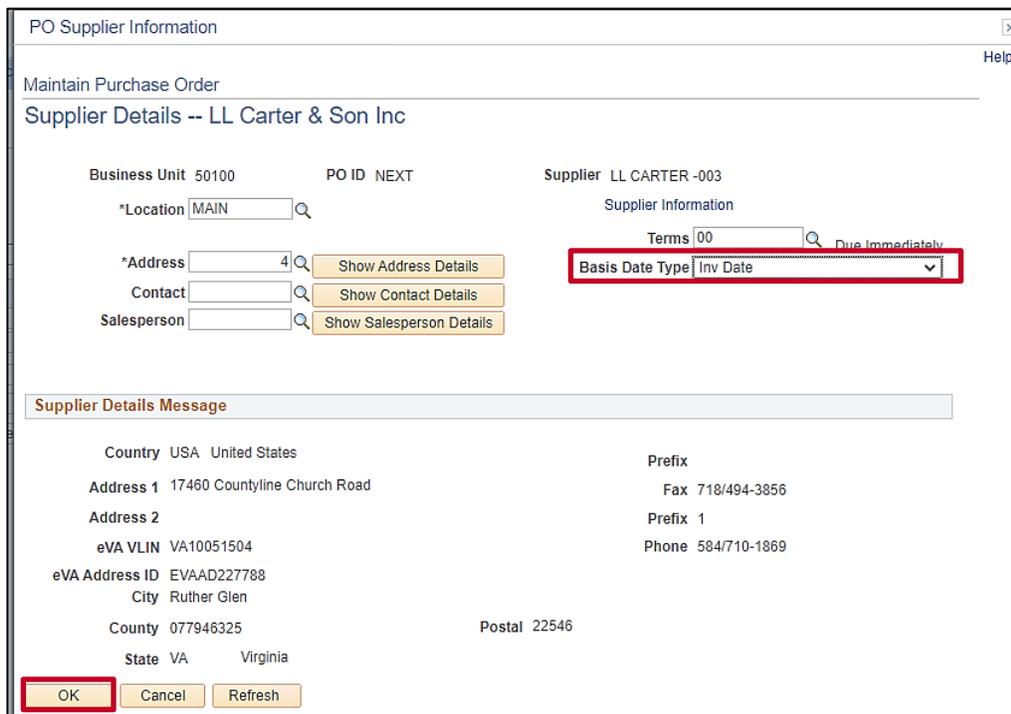
Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-3 of 3 Last

Payment Terms ID	Short Description	Description	Payment Terms Type
00	Due Now	Due Immediately	Single
00PP	Due Now PP	Due Immediately Prompt Pay	Single
30	Net 30	Net 30	Single

27. Select the Payment Terms ID of 00 (Due Immediately).



PO Supplier Information

Maintain Purchase Order

Supplier Details -- LL Carter & Son Inc

Business Unit 50100 PO ID NEXT Supplier LL CARTER -003

*Location MAIN

*Address [] Show Address Details

Contact [] Show Contact Details

Salesperson [] Show Salesperson Details

Supplier Information

Terms 00 Due Immediately

Basis Date Type Inv Date

Supplier Details Message

Country USA United States Prefix

Address 1 17460 Countyline Church Road Fax 718/494-3856

Address 2 Prefix 1

eVA VLIN VA10051504 Phone 584/710-1869

eVA Address ID EVAAD227788

City Ruther Glen

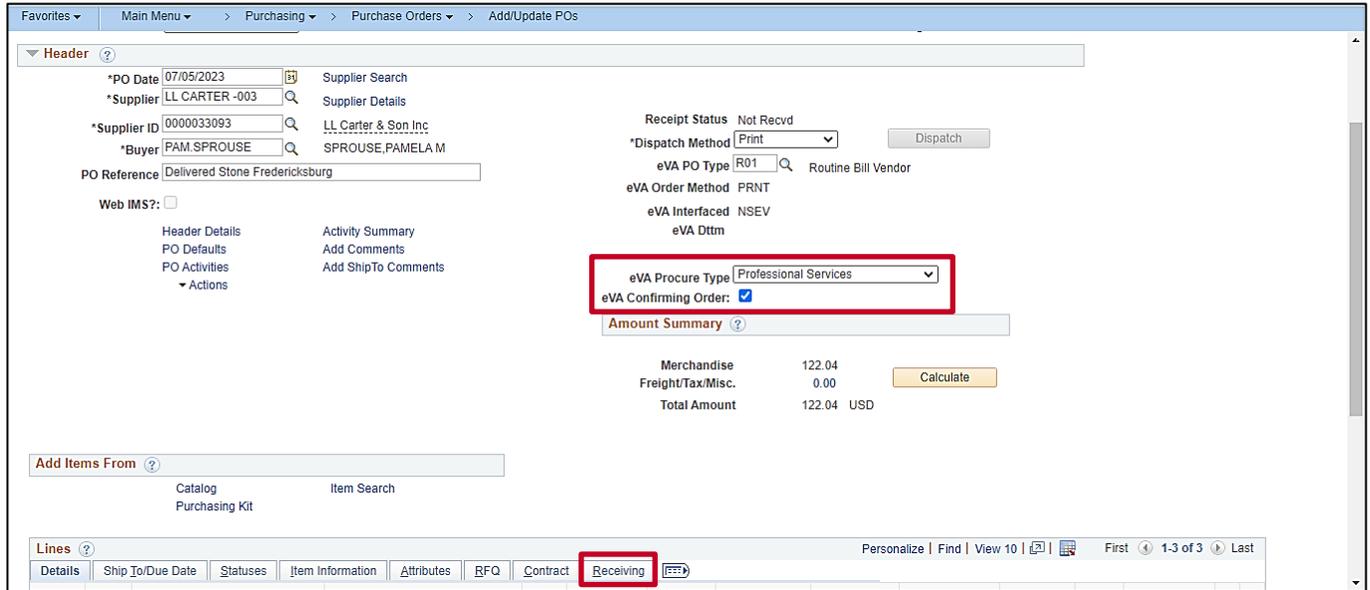
County 077946325 Postal 22546

State VA Virginia

OK Cancel Refresh

28. Click the **Basis Date Type** drop-down and select **Inv Date**.

29. Click the OK button. The Maintain Purchase Order – Purchase Order page displays.



Header

*PO Date: 07/05/2023
 *Supplier: LL CARTER -003
 *Supplier ID: 0000033093
 *Buyer: PAM.SPROUSE

Supplier Search: LL Carter & Son Inc
 Supplier Details: SPROUSE,PAMELA M

PO Reference: Delivered Stone Fredericksburg

Web IMS?:

Header Details | Activity Summary
 PO Defaults | Add Comments
 PO Activities | Add ShipTo Comments
 Actions

Receipt Status: Not Recvd
 *Dispatch Method: Print
 eVA PO Type: R01
 eVA Order Method: PRNT
 eVA Interfaced: NSEV
 eVA Dttm

Amount Summary

Merchandise	122.04	
Freight/Tax/Misc.	0.00	
Total Amount	122.04	USD

Add Items From

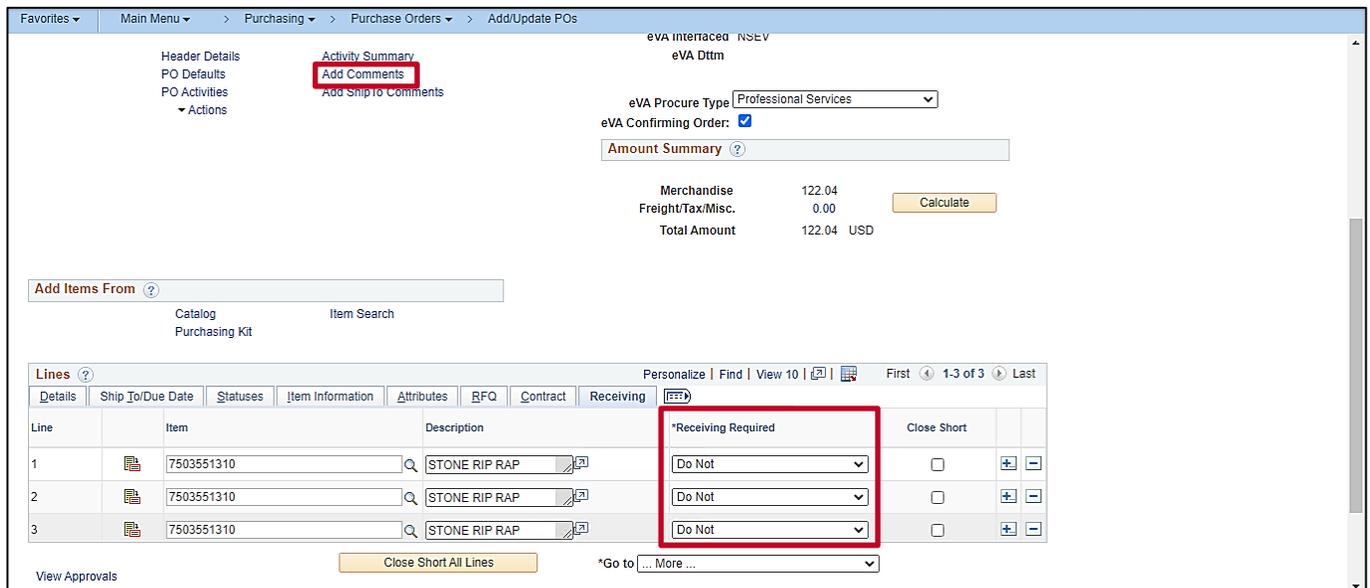
Lines

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | **Receiving**

30. Click the **eVA Procure Type** dropdown button and select “Professional Services”.

31. Select the **eVA Confirming Order** checkbox option as applicable.

32. Click the **Receiving** tab.



Header Details | Activity Summary | Add Comments | Add ShipTo Comments

eVA Interfaced: NSEV
 eVA Dttm

eVA Procure Type: Professional Services
 eVA Confirming Order:

Amount Summary

Merchandise	122.04	
Freight/Tax/Misc.	0.00	
Total Amount	122.04	USD

Add Items From

Lines

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | **Receiving**

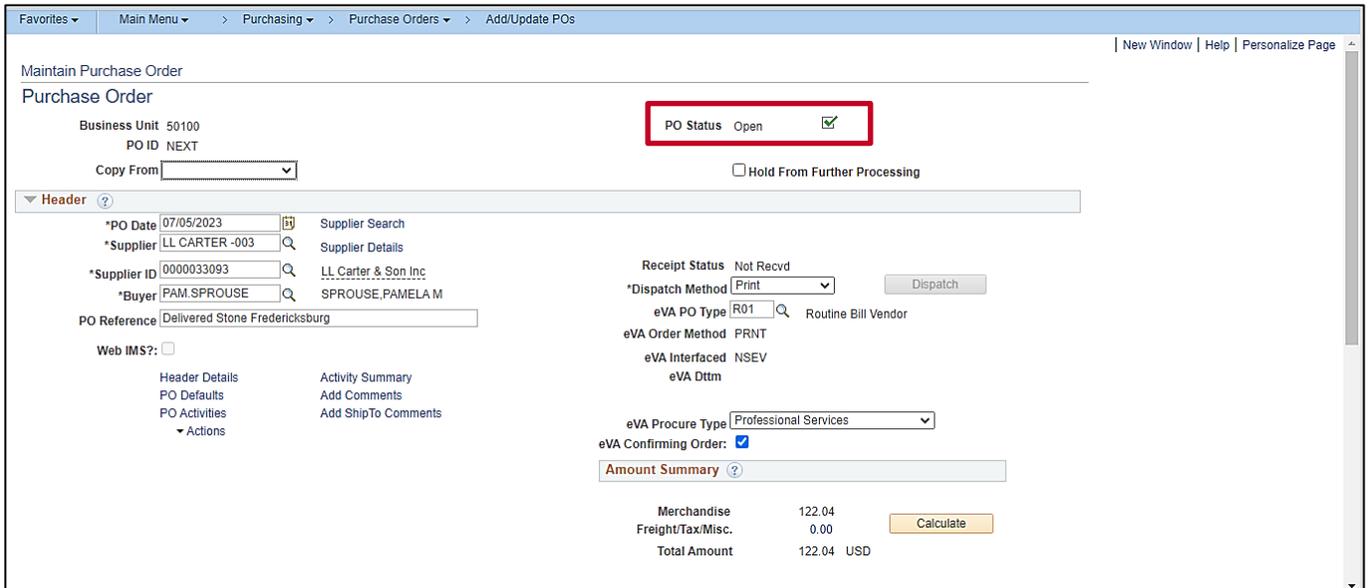
Line	Item	Description	*Receiving Required	Close Short
1	7503551310	STONE RIP RAP	Do Not	<input type="checkbox"/>
2	7503551310	STONE RIP RAP	Do Not	<input type="checkbox"/>
3	7503551310	STONE RIP RAP	Do Not	<input type="checkbox"/>

View Approvals | Close Short All Lines | *Go to More ...

33. In the **Receiving Required** field, using the drop-down arrow, select **Do Not**.

34. Remember to add comments, and any attachments desired, to your PO.

35. Scroll down to the bottom of the page and click the **Save** button.



Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs | New Window | Help | Personalize Page

Maintain Purchase Order

Purchase Order

Business Unit 50100 **PO Status** Open

PO ID NEXT

Copy From Hold From Further Processing

▼ Header ?

*PO Date 07/05/2023 Supplier Search

*Supplier LL CARTER -003 Supplier Details

*Supplier ID 0000033093 LL Carter & Son Inc

*Buyer PAM.SPROUSE SPROUSE,PAMELA M

PO Reference Delivered Stone Fredericksburg

Receipt Status Not Recvd

*Dispatch Method Print

eVA PO Type R01 Routine Bill Vendor

eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dttm

eVA Procure Type Professional Services

eVA Confirming Order:

Amount Summary ?

Merchandise	122.04	
Freight/Tax/Misc.	0.00	
Total Amount	122.04	USD

Web IMS?:

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

▼ Actions

36. Cardinal assigns a **PO ID** number upon save and the **PO Status** is set to **Open**.
37. Click the **PO Submit for Approval** check-box (the green checkmark), which is next to the **PO Status** field, to send it forward for approval by your supervisor.
38. The PO will continue on through normal PO processing. Once the Purchase Order is dispatched, the PO is complete and ready to accept vouchers. For more detailed instructions on creating and managing POs, please refer to the course entitled **PR344: Processing Purchase Orders** located on the Cardinal website in **Course Materials** under **Learning** and the job aid entitled **PR344: Purchase Orders** located on the Cardinal website in **Job Aids** under **Learning**.

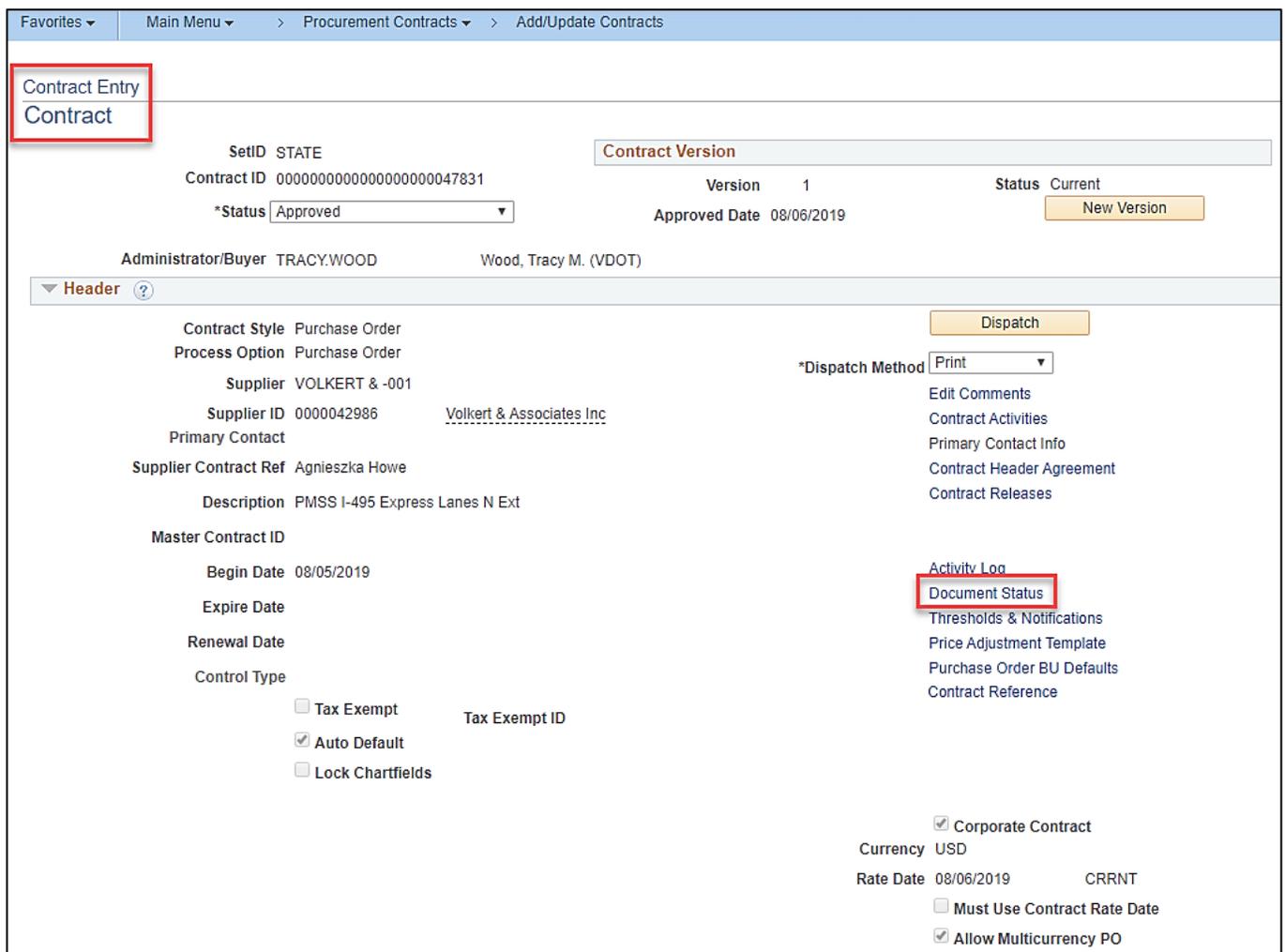
Updating a Professional Services PO – Task Orders

The PO is the principal tracking document and represents all activity related to the contract. In order to limit eVA fees, for each Professional Services contract, you would create only one PO. **Line 1** of the PO should be equal to the value of the contract. Each subsequent line added to the PO is deemed a task order (i.e., change order) executed against the contract. As each task order is added to the PO, **Line 1** of the PO is decremented for the same amount as the task order. As a result, the sum of the Professional Services PO lines is always equal to the contract. In the example below, you will create a Professional Services PO and subsequent task order against an existing contract.

Find the Related Purchase Order

1. Search for the Professional Services contract you wish to work with by navigating using the following path:

Main Menu > Procurement Contracts > Add/Update Contracts



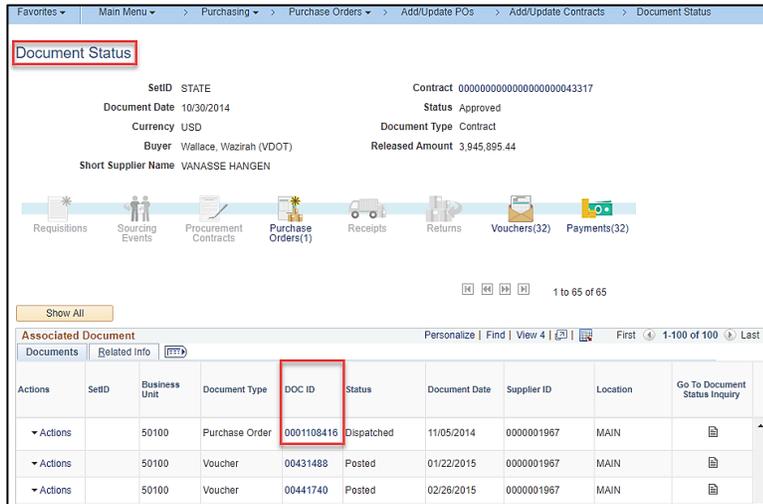
The screenshot shows a web application interface for managing procurement contracts. The breadcrumb path is 'Main Menu > Procurement Contracts > Add/Update Contracts'. The main content area is titled 'Contract Entry - Contract'. Key details include:

- Contract ID:** 00000000000000000000000047831
- SetID STATE:** (empty)
- Contract Version:** 1
- Status:** Current
- *Status:** Approved
- Approved Date:** 08/06/2019
- Administrator/Buyer:** TRACY.WOOD (Wood, Tracy M. (VDOT))
- Contract Style:** Purchase Order
- Process Option:** Purchase Order
- Supplier:** VOLKERT & -001
- Supplier ID:** 0000042986 (Volkert & Associates Inc)
- Primary Contact:** Agnieszka Howe
- Supplier Contract Ref:** Agnieszka Howe
- Description:** PMSS I-495 Express Lanes N Ext
- Master Contract ID:** (empty)
- Begin Date:** 08/05/2019
- Expire Date:** (empty)
- Renewal Date:** (empty)
- Control Type:**
 - Tax Exempt
 - Auto Default
 - Lock Chartfields

On the right side, there are several action buttons and links:

- Dispatch** (button)
- *Dispatch Method:** Print
- Activity Log** (link)
- Document Status** (link, highlighted with a red box)
- Thresholds & Notifications** (link)
- Price Adjustment Template** (link)
- Purchase Order BU Defaults** (link)
- Contract Reference** (link)
- Corporate Contract**
- Currency:** USD
- Rate Date:** 08/06/2019 (CRRNT)
- Must Use Contract Rate Date**
- Allow Multicurrency PO**

2. Once you have selected your contract, from the **Contract Entry – Contract** page, click the **Document Status** hyperlink.



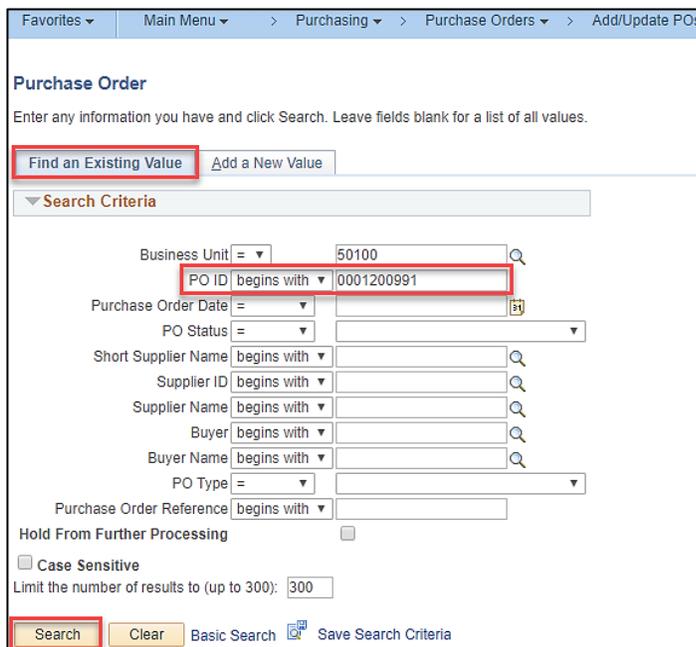
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		50100	Purchase Order	0001108416	Dispatched	11/05/2014	0000001967	MAIN	
▼ Actions		50100	Voucher	00431488	Posted	01/22/2015	0000001967	MAIN	
▼ Actions		50100	Voucher	00441740	Posted	02/28/2015	0000001967	MAIN	

3. Related documents, such as requisitions, sourcing events, POs, and payments, display.
4. You can click the **DOC ID** hyperlink to view that document's details. For a PO document, the **DOC ID** is the same as the **PO ID** number. You will use this number to find and update the PO.

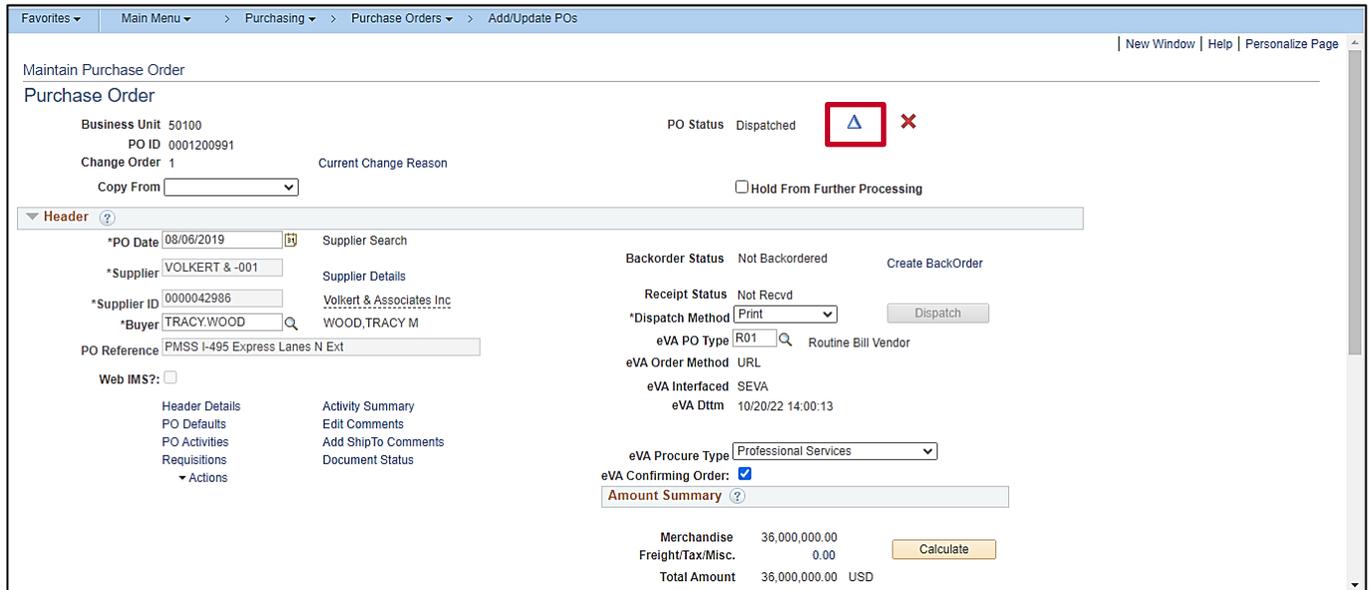
Create the Task Order

5. Navigate to the **Purchase Order** search page using the following path:

Main Menu > Purchasing > Purchase Orders > Add/Update POs



6. Select the Find an Existing Value tab.
7. Enter the **PO ID** (i.e., Purchase Order **DOC ID**).
8. Click the **Search** button. The Maintain Purchase Order – Purchase Order page displays.



Business Unit 50100 PO Status Dispatched ▲ ✕

PO ID 0001200991

Change Order 1 Current Change Reason

Copy From Hold From Further Processing

Header

*PO Date 08/06/2019 Supplier Search

*Supplier VOLKERT & -001 Supplier Details

*Supplier ID 0000042986 Volkert & Associates Inc

*Buyer TRACY.WOOD WOOD, TRACY M

PO Reference PMSS I-495 Express Lanes N Ext

Web IMS?:

Header Details Activity Summary

PO Defaults Edit Comments

PO Activities Add ShipTo Comments

Requisitions Document Status

Actions

Backorder Status Not Backordered Create BackOrder

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced SEVA

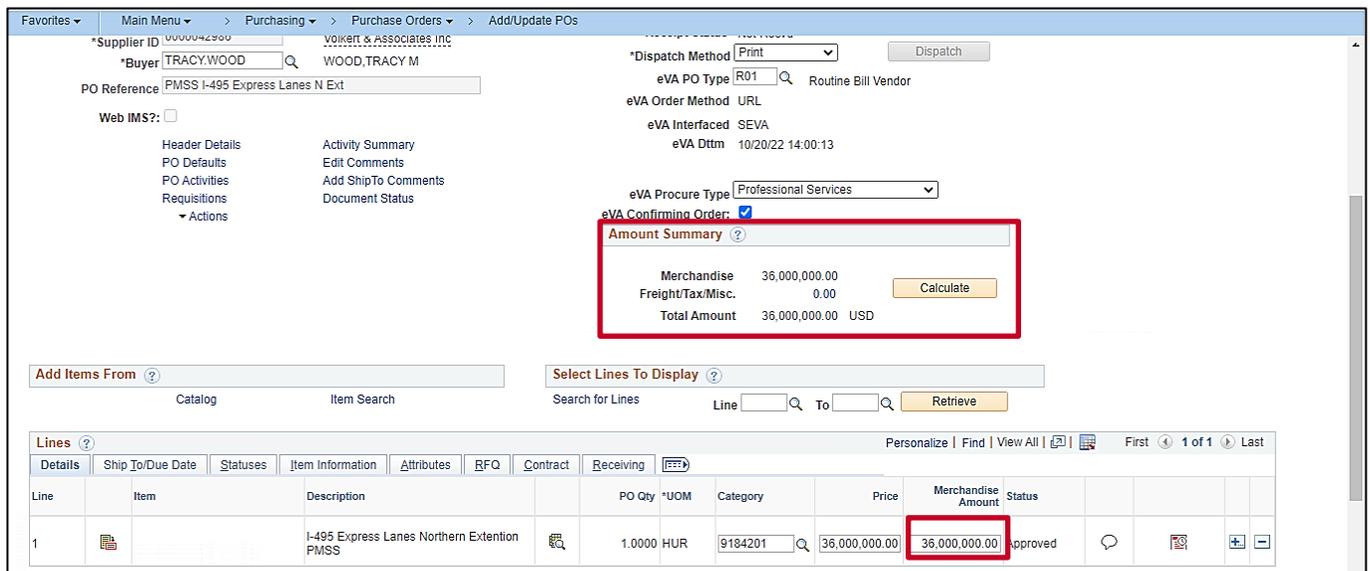
eVA Dttm 10/20/22 14:00:13

eVA Procure Type Professional Services

eVA Confirming Order:

Amount Summary

Merchandise	36,000,000.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	36,000,000.00	USD



*Supplier ID 0000042986 Volkert & Associates Inc

*Buyer TRACY.WOOD WOOD, TRACY M

PO Reference PMSS I-495 Express Lanes N Ext

Web IMS?:

Header Details Activity Summary

PO Defaults Edit Comments

PO Activities Add ShipTo Comments

Requisitions Document Status

Actions

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method URL

eVA Interfaced SEVA

eVA Dttm 10/20/22 14:00:13

eVA Procure Type Professional Services

eVA Confirming Order:

Amount Summary

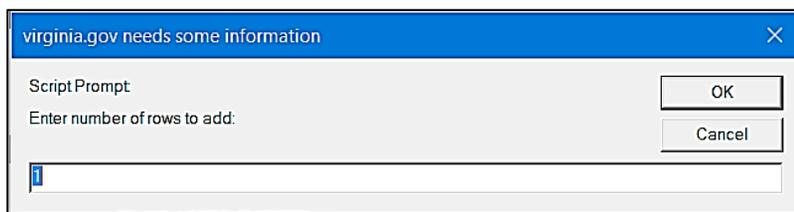
Merchandise	36,000,000.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	36,000,000.00	USD

Add Items From Catalog Item Search

Select Lines To Display Search for Lines Line To Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		I-495 Express Lanes Northern Extension PMSS	1.0000	HUR	9184201	36,000,000.00	36,000,000.00	approved

9. The PO displays. Confirm that **Line 1** matches the contract value.
10. Click the blue triangle **Change Order** icon to initiate the task order (i.e., change order).
11. Click the plus (+) icon to the right of **Line 1** to add a new line. The **Explorer User Prompt** pop-up window displays.



virginia.gov needs some information

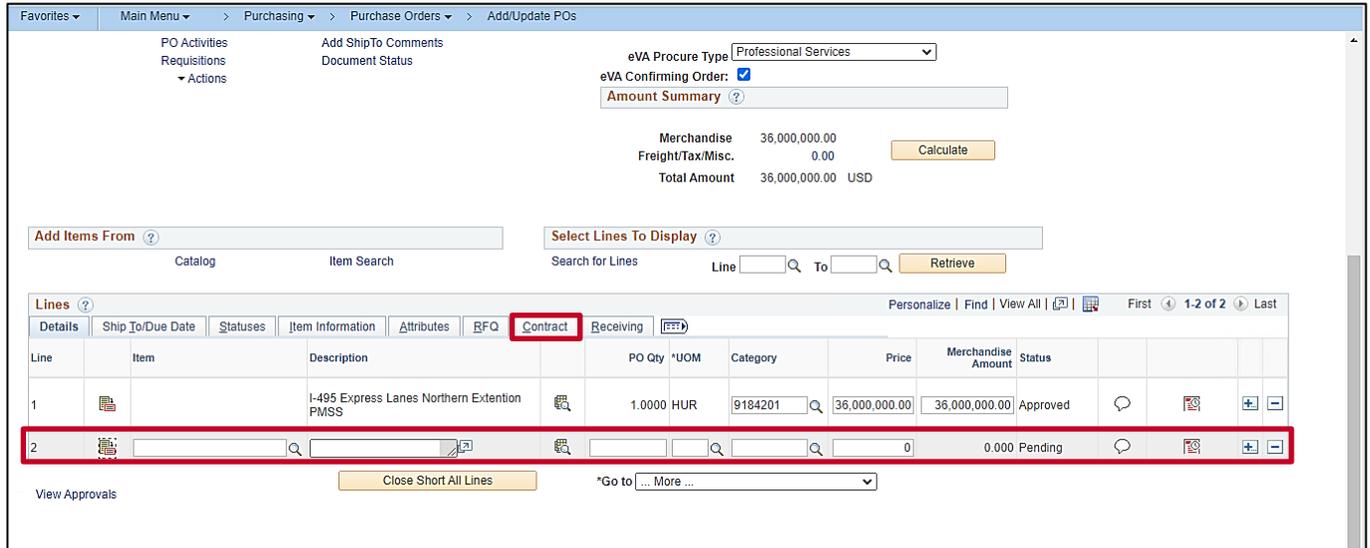
Script Prompt

Enter number of rows to add:

OK

Cancel

12. Enter the number of lines you would like to add.
13. Click the **OK** button. A message is displayed reminding the user that a change order will be created. Click the **OK** button. The Maintain Purchase Order – Purchase Order page displays.



PO Activities Requisitions Actions

Add ShipTo Comments Document Status

eVA Procure Type: Professional Services

eVA Confirming Order:

Amount Summary ?

Merchandise: 36,000,000.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 36,000,000.00 USD

Calculate

Add Items From ? Catalog Item Search

Select Lines To Display ? Search for Lines Line [] To [] Retrieve

Lines ? Personalize | Find | View All | First 1-2 of 2 Last

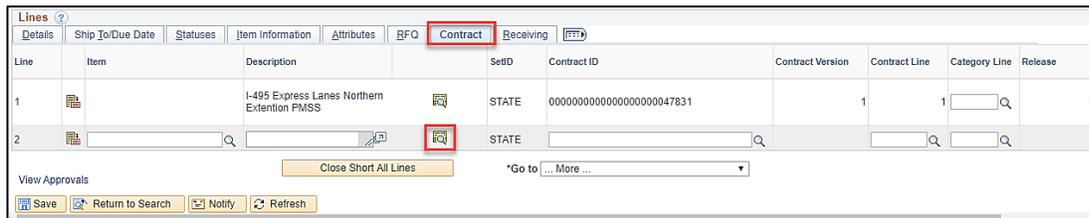
Details Ship To/Due Date Statuses Item Information Attributes RFQ **Contract** Receiving

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		I-495 Express Lanes Northern Extension PMSS	1.0000	HUR	9184201	36,000,000.00	36,000,000.00	Approved
2						0	0.000	Pending

View Approvals Close Short All Lines *Go to ... More ...

14. The new line(s) is shown and is available for insertion of values.

15. Click the **Contract** tab.



Lines ? Details Ship To/Due Date Statuses Item Information Attributes RFQ **Contract** Receiving

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release
1		I-495 Express Lanes Northern Extension PMSS	STATE	00000000000000000000047831		1	1	1
2			STATE					

View Approvals Close Short All Lines *Go to ... More ...

Save Return to Search Notify Refresh

16. Click the **Contract Search** icon on the line you created. The **Contract Search** pop-up window displays.

Contract Search

Search Criteria

SetID STATE	Supplier SetID STATE
Contract ID <input type="text"/>	Supplier ID 0000042986 Volkert & Associates Inc
Contract Style <input type="text"/>	Item SetID STATE
Contract Process Option <input type="text"/>	Item ID <input type="text"/>
Administrator/Buyer <input type="text"/>	Item Description <input type="text"/>
Description <input type="text"/>	Category <input type="text"/>
Master Contract ID <input type="text"/>	Manufacturer ID <input type="text"/>
Contract Reference Type <input type="text"/>	Manufacturer's Item ID <input type="text"/>
Corporate Contract <input type="text"/>	Supplier Item ID <input type="text"/>
PO Date 08/06/2019	UPN ID <input type="text"/>

Contract Details Personalize | Find | View All | First 1-10 of 16 Last

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price	
<input checked="" type="checkbox"/>	0000000000000000000047831	1	Line Item	9184201		I-495 Express Lanes Northern Extension PMSS	36000000.00000	Y	
<input type="checkbox"/>	0000000000000000000046787	1	Line Item	9184201		SAFETY INSP OF HW STRUCTURES IN STAUNTON AND CULPEPER	2000000.00000	Y	

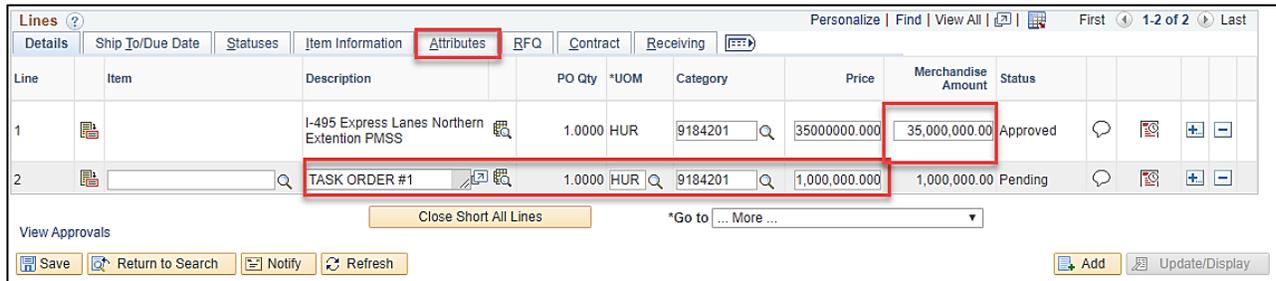
17. The Supplier information has prepopulated.
18. Click the **Search** button.
19. Select the contract/line you wish to use to populate the PO line.
20. Click the **OK** button. The Maintain Purchase Order – Purchase Order page displays.

Lines Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving |

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release	Milestone Line	GPO ID
1		I-495 Express Lanes Northern Extension PMSS	STATE	0000000000000000000047831	1	1	<input type="text"/>		1	
2		I-495 Express Lanes	STATE	0000000000000000000047831	1	1	<input type="text"/>			

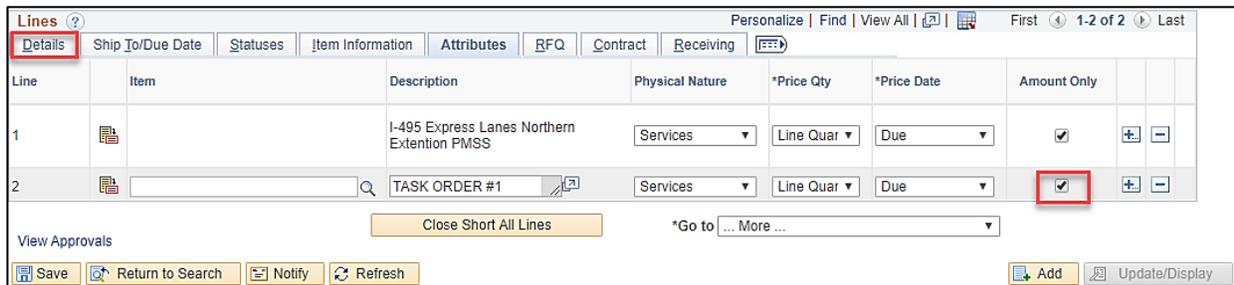
View Approvals *Go to ... More ...

21. The **Description**, **Contract ID**, and **Contract Line** number from the selected contract populate the newly added line.
22. Click the **Details** tab.



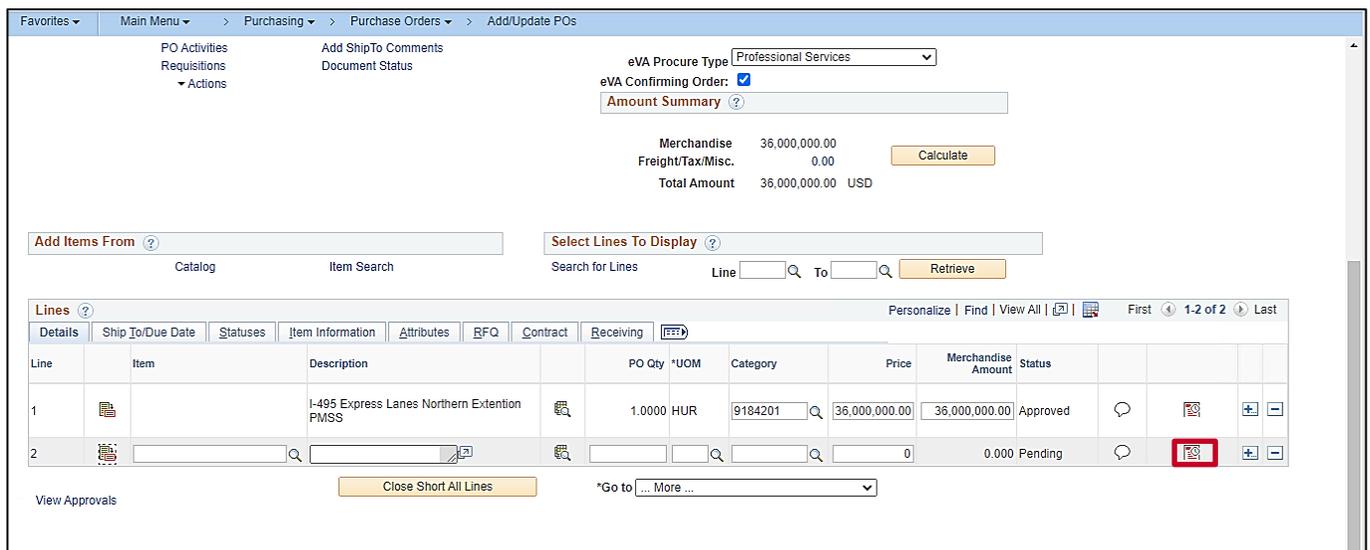
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		I-495 Express Lanes Northern Extension PMSS	1.0000	HUR	9184201	35000000.000	35,000,000.00	Approved
2		TASK ORDER #1	1.0000	HUR	9184201	1,000,000.000	1,000,000.00	Pending

23. On the new **Line** (e.g., **Line 2**), update the **Description** text to identify the line as a task order.
24. On the new **Line** (e.g., **Line 2**), insert the value of the task order in the **Price** field.
25. On **Line 1**, decrement the **Merchandise Amount** field by the amount of the new line – task order (in this example **Line 2**).
26. Confirm that the sum of all the PO lines equal the original PO amount, which is equal to the total contract value. (Sum PO Lines = Original PO Total = Contract Total)
27. Click the **Attributes** tab.



Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only
1		I-495 Express Lanes Northern Extension PMSS	Services	Line Quar	Due	<input type="checkbox"/>
2		TASK ORDER #1	Services	Line Quar	Due	<input checked="" type="checkbox"/>

28. On the new line (e.g., **Line 2**), select the **Amount Only** check-box.
29. Click the **Details** tab.



PO Activities: Requisitions, Actions

Add ShipTo Comments, Document Status

eVA Procure Type: Professional Services

eVA Confirming Order:

Amount Summary

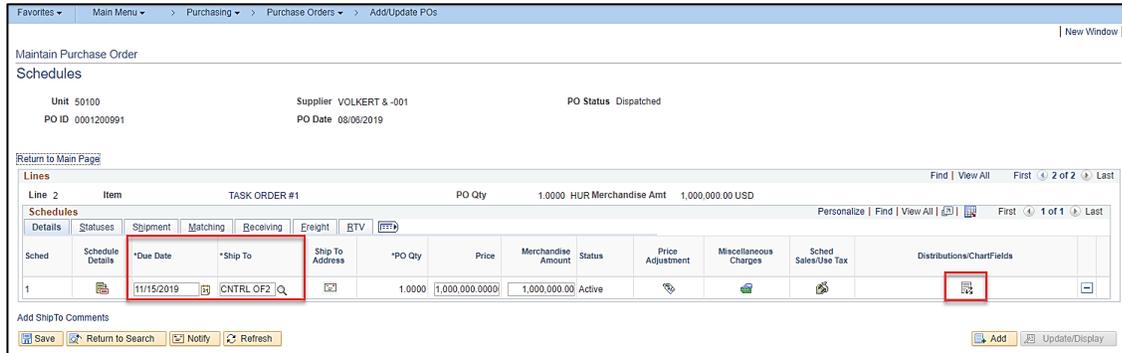
Merchandise	36,000,000.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	36,000,000.00 USD	

Add Items From: Catalog, Item Search

Select Lines To Display: Search for Lines, Line: [] To: [] Retrieve

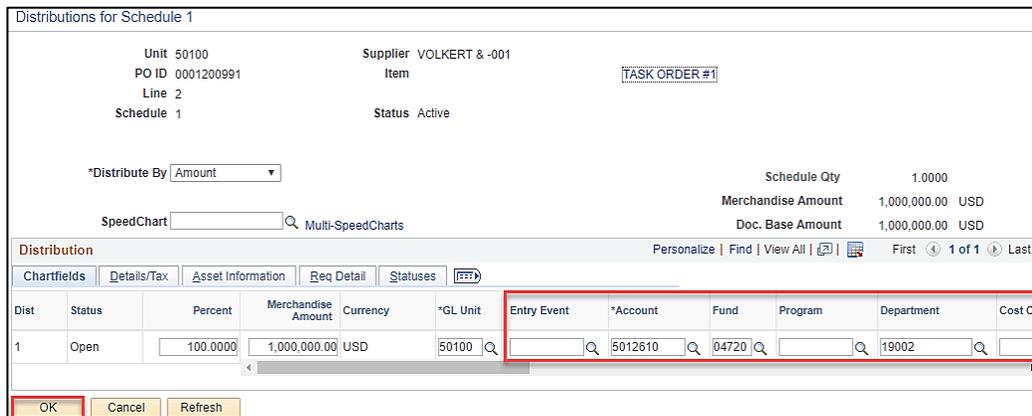
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		I-495 Express Lanes Northern Extension PMSS	1.0000	HUR	9184201	36,000,000.00	36,000,000.00	Approved
2						0	0.00	Pending

30. On the new line (e.g., **Line 2**), click the **Schedule** icon. The **Maintain Purchase Order – Schedules** page displays.

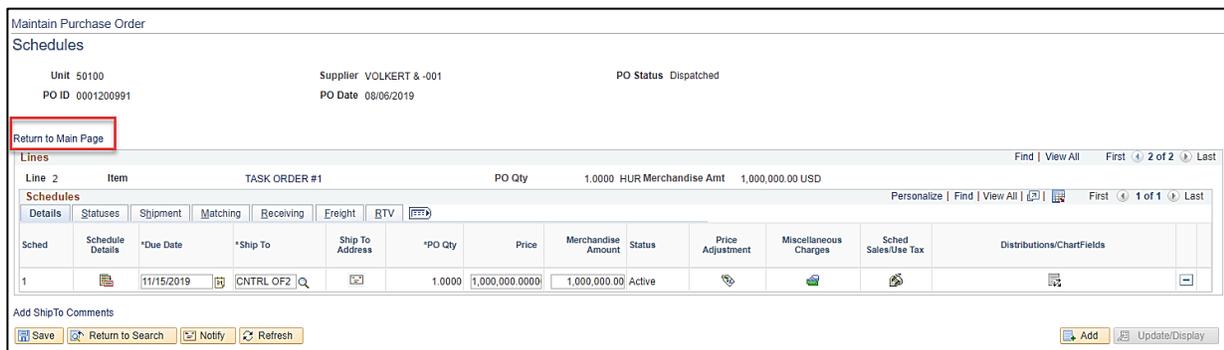


31. If necessary, edit **Due Date** and **Ship To** specific to this task order.

32. Click the **Distribution** icon. The **Maintain Purchase Order – Distributions for Schedule 1** pop-up window displays.



33. Enter the accounting distribution specific to the task order.



34. Click the **Return to Main Page**. The **Maintain Purchase Order – Purchase Order** page displays.



Procurement Job Aid

PR344_Professional Services Purchase Orders (VDOT)

Navigation: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs

Amount Summary

Merchandise	36,000,000.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	36,000,000.00	USD

Add Items From: Catalog | Item Search

Select Lines To Display: Search for Lines | Line: [] | To: [] | Retrieve

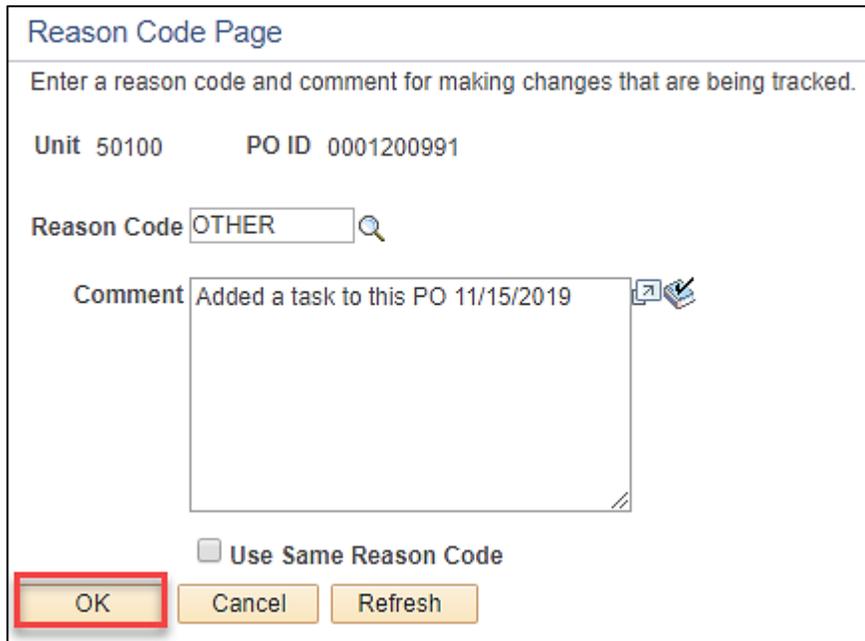
Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status	Actions
1		I-495 Express Lanes Northern Extension PMSS	1.0000	HUR	9184201	36,000,000.00	36,000,000.00	Approved	[] [] [] [] []
2		Task Order #1	1.0000	HUR	9184201	1,000,000.00	0.000	Pending	[] [] [] [] []

View Approvals | Close Short All Lines | *Go to [] More ...

Buttons: Save | Return to Search | Notify | Refresh | Add | Update/Display

35. Remember to add comments, and any attachments desired, to your newly added task order line on the PO.
36. Click the **Save** button. The **Change Reason** pop-up window displays.



Reason Code Page

Enter a reason code and comment for making changes that are being tracked.

Unit 50100 PO ID 0001200991

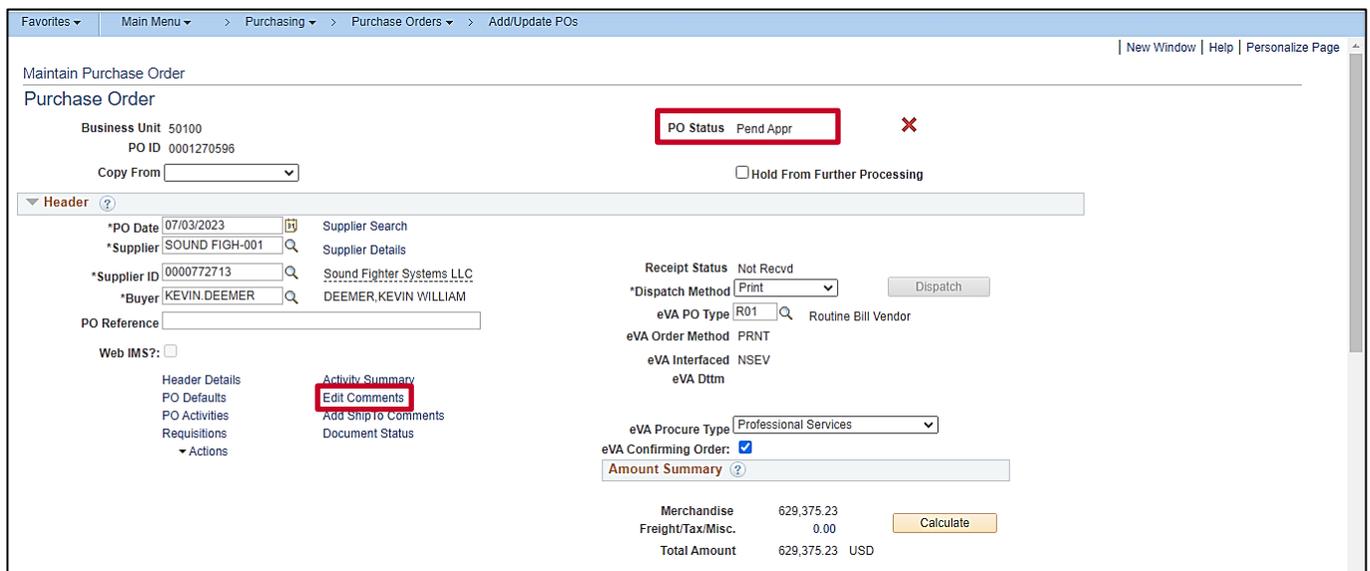
Reason Code 🔍

Comment 📎 📄

Use Same Reason Code

OK Cancel Refresh

37. Enter Reason Code and Comment.
38. Click the OK button. The Maintain Purchase Order – Purchase Order page displays.



Navigation: Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100 **PO Status Pend Appr** ✖

PO ID 0001270596

Copy From [dropdown] Hold From Further Processing

▼ Header ?

*PO Date 07/03/2023 Supplier Search

*Supplier SOUND FIGH-001 Supplier Details

*Supplier ID 0000772713 Sound Fighter Systems LLC

*Buyer KEVIN DEEMER DEEMER, KEVIN WILLIAM

PO Reference [input]

Web IMS?:

Header Details **Activity Summary**

PO Defaults Edit Comments

PO Activities Add ShipTo Comments

Requisitions Document Status

▼ Actions

Receipt Status Not Recvd

*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dttm

eVA Procure Type Professional Services

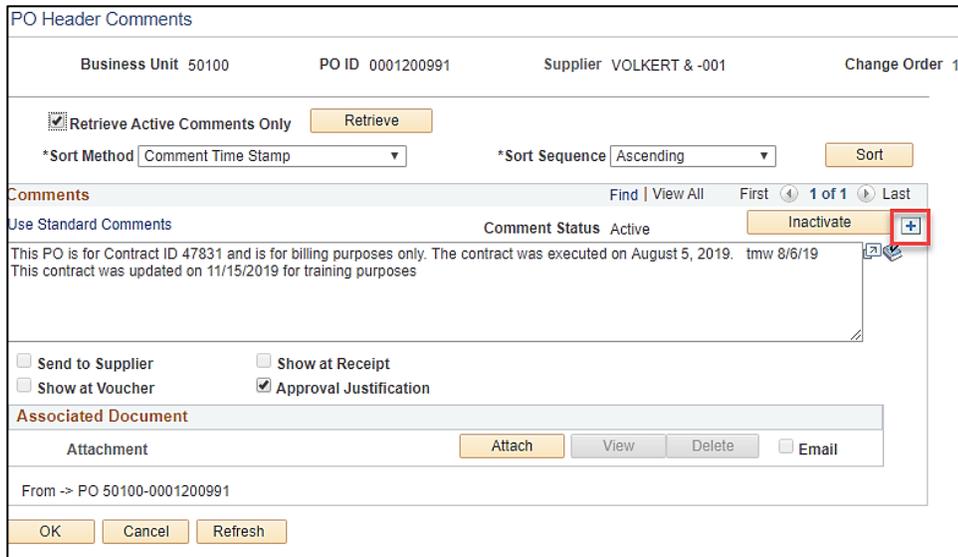
eVA Confirming Order:

Amount Summary ?

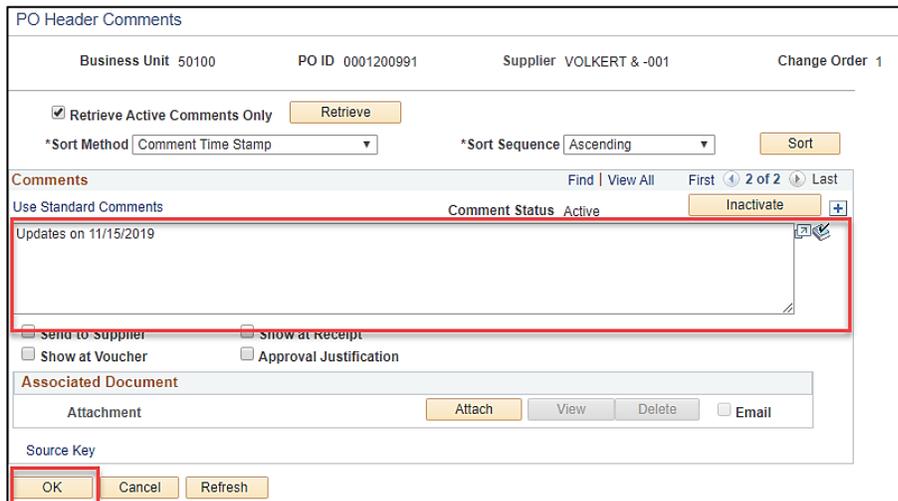
Merchandise	629,375.23	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	629,375.23	USD

39. The **PO Status** is updated to **Pend Appr** (i.e., pending approval).

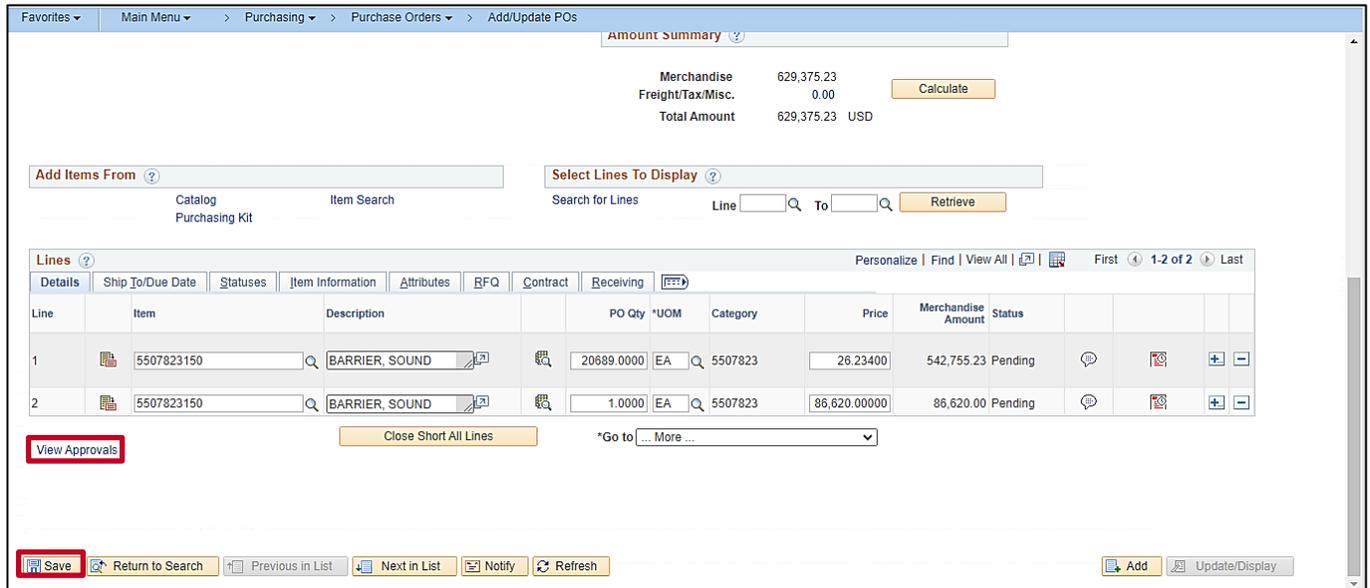
40. Click the **Edit Comments** hyperlink to add required comments at the PO level. The **PO Header Comments** pop-up window is shown.



41. Click the **(+)** icon to add a new comment.



42. Enter comment(s) specific to this task order for approval justification.
43. Click the **OK** button. The Maintain Purchase Order – Purchase Order page displays.



Amount Summary

Merchandise	629,375.23	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	629,375.23	USD

Add Items From: Catalog, Purchasing Kit

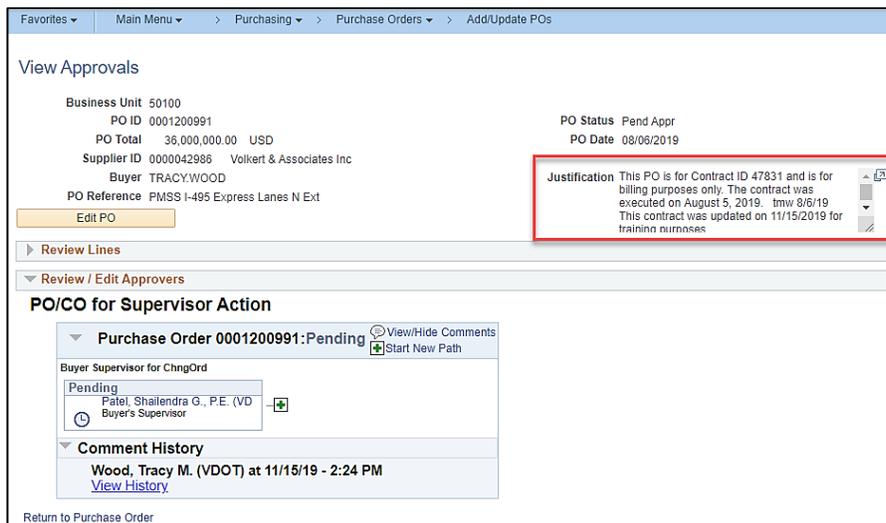
Select Lines To Display: Search for Lines, Line [] To [] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	5507823150	BARRIER, SOUND	20689.0000	EA	5507823	26.23400	542,755.23	Pending
2	5507823150	BARRIER, SOUND	1.0000	EA	5507823	86,620.00000	86,620.00	Pending

Buttons: View Approvals, Close Short All Lines, *Go to [More ...]

Bottom Bar: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Add, Update/Display

44. Click the **Save** button. The PO will route to your supervisor for approval. Task order approval is required by your supervisor because there was an insertion of a new task order line.
45. Click the **View Approvals** hyperlink to view the **Justification** comment.



View Approvals

Business Unit 50100
 PO ID 0001200991
 PO Total 36,000,000.00 USD
 Supplier ID 0000042986 Volkert & Associates Inc
 Buyer TRACY.WOOD
 PO Reference PMSS I-495 Express Lanes N Ext

PO Status Pend Appr
 PO Date 08/06/2019

Justification This PO is for Contract ID 47831 and is for billing purposes only. The contract was executed on August 5, 2019. tmw 8/6/19 This contract was updated on 11/15/2019 for training purposes

Review Lines

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0001200991: Pending

Buyer Supervisor for ChngOrd

Pending
 Patel, Shailendra G., P.E. (VD
 Buyer's Supervisor

Comment History
 Wood, Tracy M. (VDOT) at 11/15/19 - 2:24 PM
[View History](#)

Return to Purchase Order

46. The **View Approvals** page is shown and the **Justification** comment displays.
47. The PO will continue on through normal PO processing. Once the Purchase Order is dispatched, the PO is complete and ready to accept vouchers.