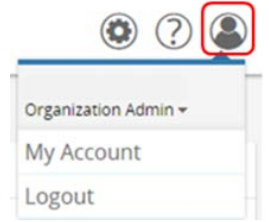


Reset Your Fiscal Year (FY) in COMMBUYS: FY27

This guidance is for standalone organizations (municipalities, for example) to reset their fiscal year in COMMBUYS. You must be signed in as the Organization Administrator (OA) to take these actions. Select the silhouette on the COMMBUYS dashboard and select the Organization Administrator role to begin.

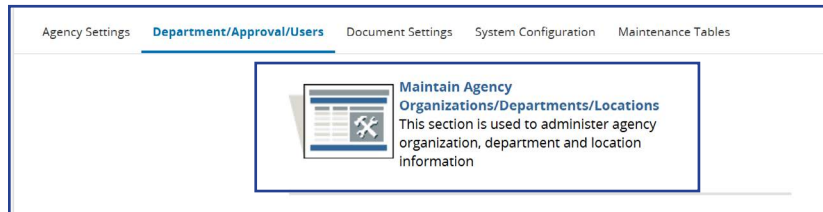


Set New FY Dates and Roll Dates



To complete this action, the OA selects the **Home** link.

From the Organization Administrator Home screen, select the **Maintain Agency Organizations/Departments/ Locations link**.



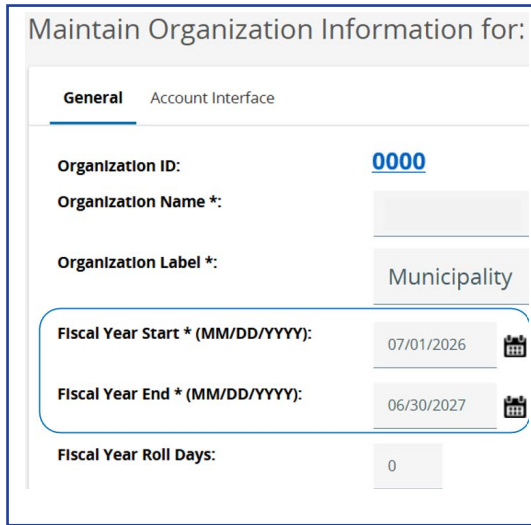
Select the **Maintain Agency Organizations** link.



Select the **Organization ID** hyperlink.

Maintain Organization			
<u>Organization ID</u>	<u>Organization Name</u>	<u>Fiscal Year Start</u>	<u>Fiscal Year End</u>
0000		07/01/2025	06/30/2026

On the **General tab**, set the new **Fiscal Year Start** and **Fiscal Year End** dates. OAs also may update the **Fiscal Year Roll Days** to enable the processing of prior FY documents.



Maintain Organization Information for:

General Account Interface

Organization ID: **0000**

Organization Name *:

Organization Label *:

Municipality

Fiscal Year Start * (MM/DD/YYYY): 07/01/2026

Fiscal Year End * (MM/DD/YYYY): 06/30/2027

Fiscal Year Roll Days: 0

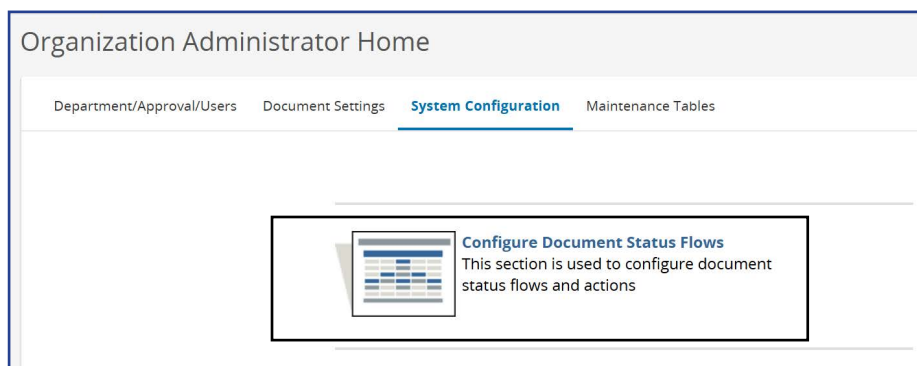
Setting **Fiscal Year Roll Days** is not required. **Fiscal Year Roll Days** may be left at zero so that users may create documents only for the current FY. Setting Fiscal Year Roll Days at 30, by contrast, would enable users to process prior FY documents for the first 30 days of the new FY.

Select **Save and Continue**.

Roll Status Flows to the New Fiscal Year

OAs will copy the prior year status flow actions for the Purchase Order Document Type to the new FY.

From the **Organization Administrator Home** screen, OAs will select the **System Configuration** tab and select the **Configure Document Status Flows** icon.



On the **Document Status Flow Configuration** page, select **Purchase Order** from the **Document Type** drop-down menu. On the row showing **3PRS-Ready to Send** (*From Status* column) and **3PS-Sent** (*To Status* column), select **Add Actions**.

Document Status Flow Configuration

Module: **Purchasing Module** Document Type: **Purchase Order** Fiscal Year: **2027**

From Status	To Status	Mail Flag	Mail To	Status Level	Actions for Fiscal Year
3PI-In Progress	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions
3PPR-Partial Receipt	3PCA-Canceled	<input checked="" type="checkbox"/>	Requestor	Both	Actions: Add Actions
3PRA-Ready for Approval	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions
3PRS-Ready to Send	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions
3PRS-Ready to Send	3PS-Sent	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions
3PS-Sent	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions

On the **Document Status Flow Action Configuration** page, select **Validate** under *Action Type* and **Encumbrance** under *Event Type*. Select **Save & Exit**.

Document Status Flow Action Configuration

Document Type: **Purchase Order**
 Fiscal Year: **2027**
 From Status: **3PRS - PO Ready to Send**
 To Status: **3PS - PO Sent (Printed or EDIed to the recipient)**

Delete	Sequence	Action Type	Event Type
Add New:	0	Validate	Encumbrance
Add New:	0		Not Applicable
Add New:	0		Not Applicable

To add a new action, enter a sequence number larger than 0 and select an action type and event type. The order of execution depends on the sequence number, the action with smaller sequence number is executed earlier.

Verify the changes have been saved and that the Actions for Fiscal Year show **Validate E**.

Document Status Flow Configuration						
Module:	Purchasing Module	Document Type:	Purchase Order	Fiscal Year:	2027	
From Status	To Status	Mail Flag	Mail To	Status Level	Actions for Fiscal Year	
3PI-In Progress	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions	
3PPR-Partial Receipt	3PCA-Canceled	<input checked="" type="checkbox"/>	Requestor	Both	Actions: Add Actions	
3PRA-Ready for Approval	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions	
3PRS-Ready to Send	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions	
3PRS-Ready to Send	3PS-Sent	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Validate E	
3PS-Sent	3PCA-Canceled	<input checked="" type="checkbox"/>	Purchaser	Both	Actions: Add Actions	

Note: This process only is required for the Purchase Order **Document Type**.

OSD Help Desk Resources

OSD Help Desk staff are available to assist you by phone at 888-627-8283 or via email at OSDHelpDesk@mass.gov. Help Desk hours are 8:00 a.m. to 5:00 p.m. ET, Monday through Friday.