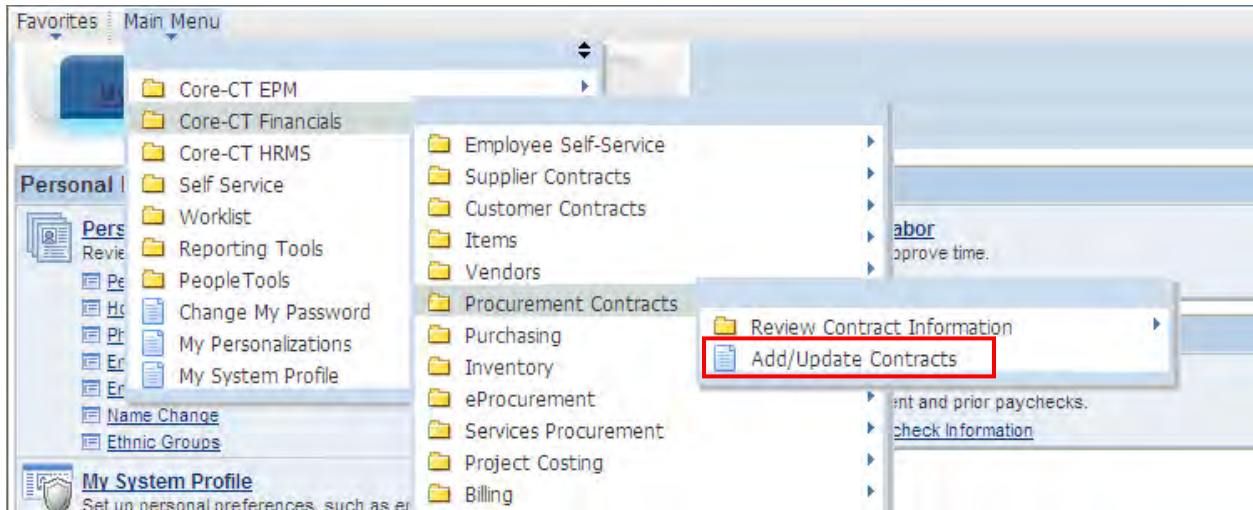


Contracts

Navigation: Main Menu > Core-CT Financials > Procurement Contracts > Add/Update Contracts.



The Contract Entry page will display, and the Add a New Value Tab will be active.

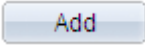
Manually enter the contract number in the Contract ID field using the Core-CT numbering schema: two numbers to represent the calendar year, three characters to represent the Agency, four sequential numbers to represent the contract number, and two alphas to represent the supplier.

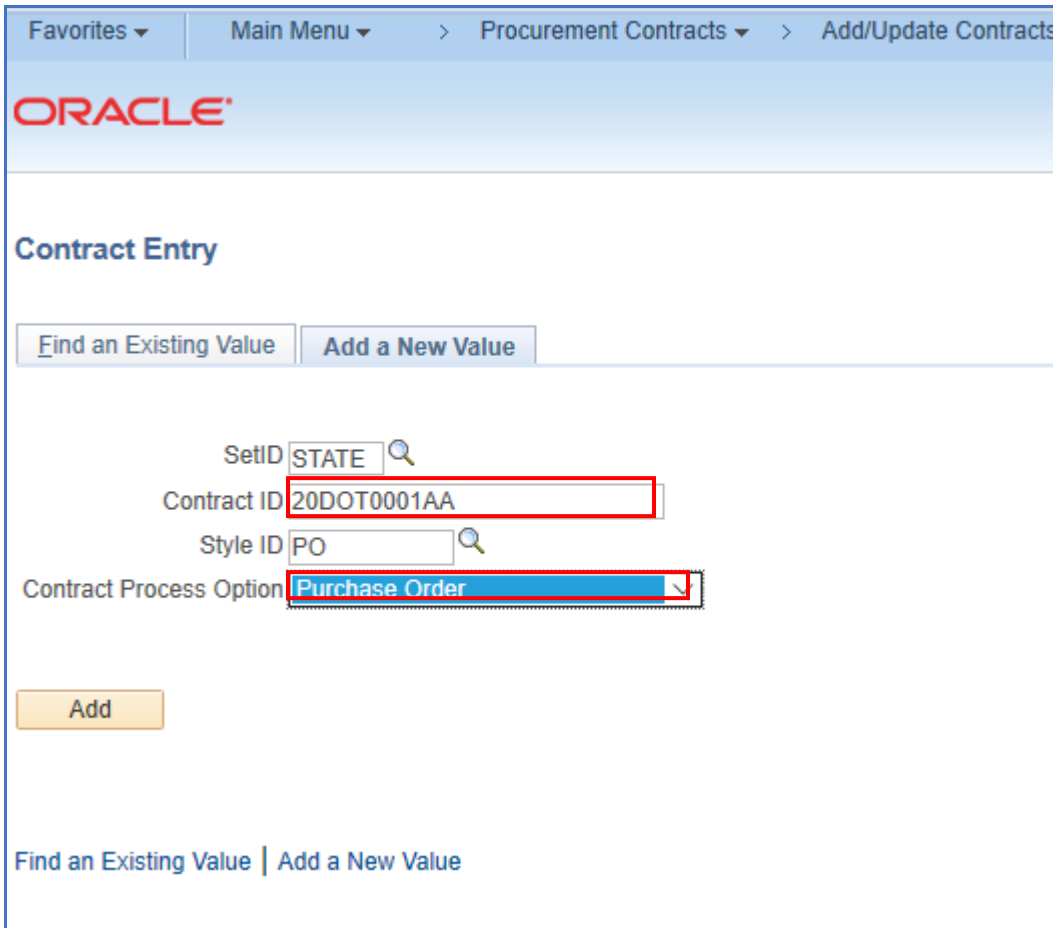
- The first 2 characters are numeric for the calendar year that the contract is being created in. For example, if the contract is being created in calendar year 2022, the numeric is 22.
- The three characters to represent the Agency: if this contract was being created by the Department of Transportation, the user would input DOT.
- The four sequential numbers represent the contract number, such as 0001, 0002 and such.
- The 2 alpha characters to represent the supplier. If more than one supplier is awarded this contract, these letters differentiate between suppliers. The first alphas used would be AA, followed by AB, AC, etc.

In this example the contract number would be: 22DOT0001AA. If there was an additional supplier awarded on this contract the next contract number to be used would be: 22DOT0001AB.

The use of this numbering schema will provide consistency of data entry for all state Business Units and will facilitate a standardized item loading process when items need to be loaded into the item master tables via the Catalog Management module.

For the **Contract Process Option**, select Purchase Order from the drop-down menu. (This will always be Purchase order)

Click the  button.



Favorites ▾ Main Menu ▾ > Procurement Contracts ▾ > Add/Update Contracts

ORACLE

Contract Entry

[Find an Existing Value](#) [Add a New Value](#)

SetID STATE 🔍

Contract ID 20DOT0001AA

Style ID PO 🔍

Contract Process Option **Purchase Order** ▾


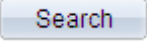
[Add](#)

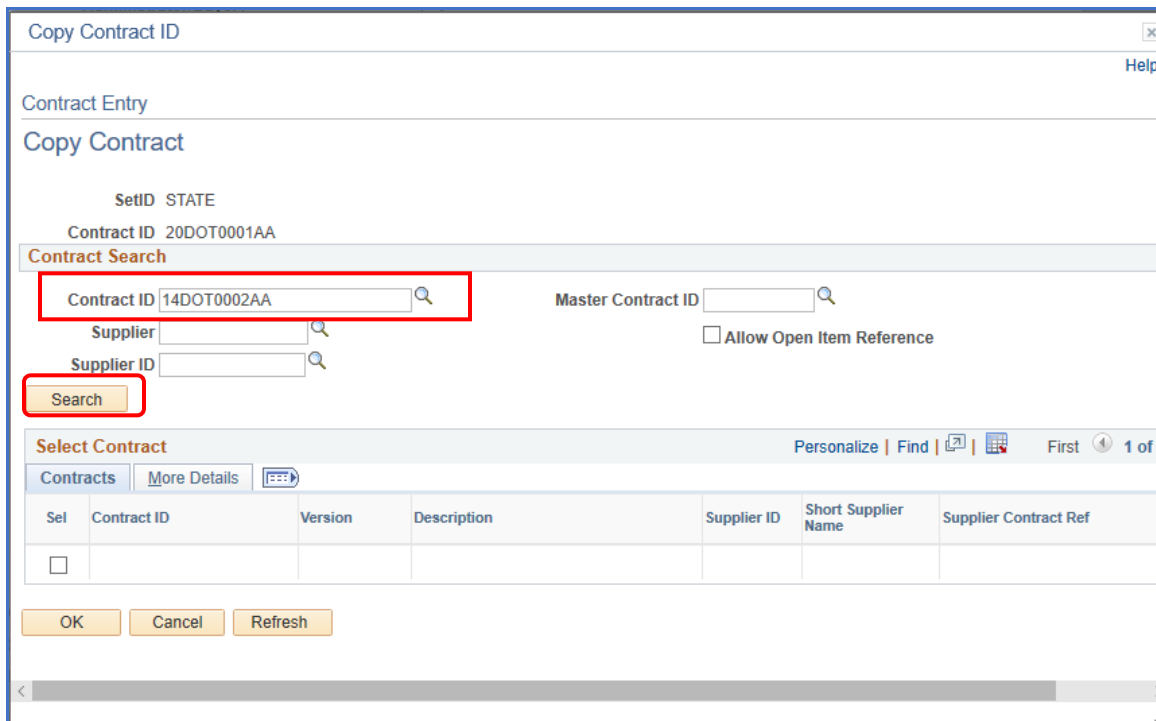
[Find an Existing Value](#) | [Add a New Value](#)

This will take you to the Contract Entry Page. The Contract Entry Page is comprised of five sections: The Contract, the Header, Order Contracts Options, Contract Items, and Contract Categories.

1. In the **Contract section**, you have the option to copy from a previously created contract. Click on [Copy From Contract](#). If you are not going to copy from a contract, skip down to Status.

NOTE: The contract process option must be the same as the contract you are copying from (i.e. General to General or Purchase Order to Purchase Order).

This will open a new screen where you can search for an existing contract by Contract ID, Supplier, or Supplier ID. Use the search icon  to look for existing values. Once you have found the contract you are looking for, click .



Copy Contract ID Help


Contract Entry


Copy Contract


SetID STATE


Contract ID 20DOT0001AA

Contract Search


Contract ID 

Supplier 

Supplier ID 

Master Contract ID 

Allow Open Item Reference

Select Contract Personalize | Find |  First 1 of

Sel	Contract ID	Version	Description	Supplier ID	Short Supplier Name	Supplier Contract Ref
<input type="checkbox"/>						

This will bring the contract information down to the Select Contract section.

Check the box next to the contract, then click .

x
Help

Contract Entry

Copy Contract

SetID STATE

Contract ID 20DOT0001AA

Contract Search

Contract ID Master Contract ID

Supplier Allow Open Item Reference

Supplier ID

Select Contract Personalize | Find | | | F

Contracts

Sel	Contract ID	Version	Description	Supplier ID	Short Supplier Name	Supplier Contract
<input checked="" type="checkbox"/>	14DOT0002AA	1	7.15-01(13) 172-405	0000035534	231575527F-001	

The information from the contract you selected has been copied over. Continue on and make any changes to the fields, if necessary.

The screenshot displays the 'Contract Entry' screen in Core-CT. The interface is divided into several sections:

- Contract Entry Contract:** Includes fields for SetID, STATE, Copy From Contract, Contract ID (20DOT0001AA), *Status (Open), Administrator/Buyer, State Identified Contract Type (Statutory Contractual Services), Contract Version (1), Status (Current), and Approval Due Date.
- Header:** Contains *Contract Style (Purchase Order), Process Option (Purchase Order), *Supplier (231575527F-001), *Supplier ID (0000035534), URBAN ENGINEERS INC., *Begin Date (02/20/2020), Expire Date (12/31/2020), Renewal Date, Currency (USD), CRRNT, Primary Contact, Supplier Contract Ref, Description (7.15-01(13) 172-405), Master Contract ID, Tax Exempt ID, and a Tax Exempt checkbox.
- Amount Summary:** A table showing financial details:

Field	Value	Unit
Maximum Amount	1,061,170.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Non-PO PCard Transactions	0.00	
Total Released Amount	0.00	
- Order Contract Options:** Includes checkboxes for Allow Multicurrency PO, Allow Open Item Reference, Corporate Contract, Lock Chartfields, Adjust Supplier Pricing First, Price Can Be Changed on Order, Must Use Contract Rate Date, and Auto Default. The Rate Date is 09/18/2013.
- Contract Items:** A table with columns for Line, Item, Description, UOM, Category, Include for Release, and Status. The first row shows Line 1, Item To perform Construction, UOM EA, Category 81000000, and Status Active.

Status: The status of the contract. Since this is a new contract, the status is Open.

Administrator/Buyer: The originator of the Contract. Enter in the employee's Core ID number or search by clicking the search icon.

Contract Version: We no longer utilize Contract Versioning. The Version will stay on whatever version it was on when we turned Contract Versioning off.

2. The following fields must be entered in the **Header** section:

CT Contract Type: There are several types of contracts for selection and this step is very important to identify correctly. Contract type has an impact on the PO type to be selected on your Purchase Order Header Details Page.

- **BU Award - Business Unit Award** is a contract that an agency establishes based on statutory purchasing authorities or delegated statutory purchasing authorities. DAS procurement could use this value if they are establishing a contract for a single agency to use (they would need to restrict the business unit to the agency that the contract was developed for on the PO defaults page).
- **Constr. - Construction** - a contract established by DOT, DCS or any agency that has a construction contract.
- **Grant** – is a grant award that is either budgeted or federally funded between the state and another entity such as another state agency, municipality or not for profit business.
- **Loan** - used by ECD for the purpose of tracking their loan related contracts.
- **MOU – Memorandum of Understanding** - used when an agency creates a contract previously known as a Memorandum of Understanding or Memorandum of Agreement.
- **POC Comp - POS Competitive** - used by the Social Service Agencies for their Purchase of Services contracts that *were competitively bid*. Once selected, an [OPM Reporting](#) link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**
- **PON Noncom - POS Noncompetitive** - used by the Social Service Agencies for their Purchase of Services contracts that were *not competitively bid*. Once selected, an [OPM Reporting](#) link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**
- **PSC Comp - PSA Competitive** - used by any agency when Personal Service Agreement contracts that *were competitively bid*. Once selected, an [OPM Reporting](#) link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

- **PSN Noncom - PSA Noncompetitive** - used by any agency when Personal Service Agreement contracts that were *not competitively bid*. Once selected, an [OPM Reporting](#) link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**
- **Rght of Wa - Rights of Way** - used by the DOT for their right of way contracts.
- **Rntl Lease - Rental Lease** - used for Building Leasing or Real Property contracts.
- **Statewide - Statewide Award** - used by DAS when creating a contract that all agencies can use.
- **MA – Master Agreement** - used to contract for goods or services resulting from an RFP (Request for Proposal)
- **GL – General Letter** - (GL71a, b, c, d, e , f, g) is used when GL is the delegated purchasing authority.
- **SCS – Statutory Contractual Services** – to be used by DAS, DCS, and DOT only for statutory contractual services.
- **UFA – Utility Force Account** - to be used by DOT for their Utility Force Account.
- **Stand Tran – Standardization Transaction** - to be used when requesting the waiver of the bid or proposal requirement in accordance with CGS 4a-58. **Approval must be obtained by DAS before using this value.**

Oracle Procurement Contracts - Add/Update Contracts

Contract Entry

Contract

Contract ID: []

*Status: []

Administrator/Buyer: []

State Identified Contract Type: []

Header

*Contract Style: []

Process Option: []

*Supplier: []

*Supplier ID: []

*Begin Date: 02/20/2020

Expire Date: 12/31/2020

Renewal Date: []

Currency: USD CRRNT

Primary Contact: []

Supplier Contract Ref: []

Description: 7.15-01(13) 172-405

Master Contract ID: []

Tax Exempt ID: []

Tax Exempt

Order Contract Options

Allow Multicurrency PO

Corporate Contract

Lock Chartfields

Allow Open Item Reference

Adjust Supplier Pricing First

Price Can Be Changed on Order

Must Use Contract Rate Date

Auto Default

Rate Date: 09/18/2013

PO Defaults OPM Reporting Add Open Item Price Adjustments Price Adjustment Template

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Line	Item	Description	UOM	Category	Include for Release	Status
1	[]	To perform Construction	EA	81000000	<input checked="" type="checkbox"/>	Active

Amount Summary

Maximum Amount	1,061,170.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Non-PO PCard Transactions	0.00	
Total Released Amount	0.00	

Once a POC/N, PSC/N or SCS CT Contract Type is selected, the OPM Reporting link is activated. (See section 3 for details on OPM Reporting)

Contract Entry
Contract

SetID STATE Copy From Contract
Contract ID 20DOT0001AA
*Status Open
Contract Version Version 1 Status Current
Approval Due Date
Administrator/Buyer
State Identified Contract Type **POC Competitive**

Header

*Contract Style Purchase Order
Process Option Purchase Order
*Supplier 231575527F-001 Supplier Search
*Supplier ID 0000035534 URBAN ENGINEERS INC.
*Begin Date 02/20/2020
Expire Date 12/31/2020
Renewal Date
Currency USD CRRM
Primary Contract
Supplier Contract Ref
Description 7.15-01(13) 172-405
Master Contract ID
Tax Exempt ID
 Tax Exempt

Amount Summary

Maximum Amount	1,061,170.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Non-PO PCard Transactions	0.00	
Total Released Amount	0.00	

Order Contract Options

Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields
 Allow Open Item Reference
 Adjust Supplier Pricing First
 Price Can Be Changed on Order
 Must Use Contract Rate Date
 Auto Default
Rate Date 09/18/2013

PO Defaults **OPM Reporting** Add Open Item Price Adjustments Price Adjustment Template

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	UOM	Category	Include for Release	Status
1		To perform Construction	EA	81000000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

Supplier: Use the [Supplier Search](#) link to find the supplier to be associated with this contract.

Supplier Search

Search Criteria

Name Short Name

Alternate Supp Name

City State

Country Postal

Class Type

Max Rows

Search Results Personalize | Find | View All | First 1 of 1 Last

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>					

Supplier Detail Address

Fill in any of the fields to retrieve the Supplier and then click .

Results returned will show in the Search Results view.

Supplier Search

Search Criteria

Name Short Name

Alternate Supp Name

City State

Country Postal

Class Type

Max Rows

1 to 10 of 25 First 1-4 of 10 Last

Search Results Personalize | Find | View All | First 1-4 of 10 Last

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input type="checkbox"/>	0000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	N
<input type="checkbox"/>	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

Supplier Detail Address

To view information about the supplier; place a check in the **Sel** checkbox and click [Supplier Detail](#) or [Address](#).

Supplier Detail

SetID	STATE	Supplier ID	0000010009	Supplier Status	Approved
Short Supplier Name	SUBURB3422-001			Supplier Classification	Supplier
In City Limit	N			HR Class	
Additional Name				Persistence	Regular
Alternate Supp Name				Open For Ordering	Y
Address	00001	693 HIGH ST		Withholding Applicable	N
Corporate Supplier	0000010009	SUBURBAN STATIONERS INC		Display VAT Flag	N
Remit Supplier	0000010009	SUBURBAN STATIONERS INC			

Supplier Types Personalize | Find | View All | [?] | [X] First 1 of 1 Last

Type	Long Name

Address

SetID:	STATE	Vendor ID:	0000010009
Country:	USA United States		
Address 1:	693 HIGH ST		
Address 2:			
Address 3:			
City:	MIDDLETOWN		
County:		Postal:	06457
State:	CT	Connecticut	

Click or to return you to the previous screen, so you can select the supplier for the Contract.

Supplier Search

Search Criteria

Name: Short Name:

Alternate Supp Name:

City: State:

Country: Postal:

Class: Type:

Max Rows:

1 to 10 of 25

Search Results

Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
<input checked="" type="checkbox"/>	0000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	N
<input type="checkbox"/>	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

Supplier Detail:

Select the vendor by placing a check in the **Sel** checkbox and click the button. This will bring the supplier data onto the Contract Header page.

If the supplier does not exist in the Core-CT system, please contact OSC for the necessary forms to request an addition to the vendor file.

Continue entering Header Information:

Header

CT Contract Type: [Add Comments](#) [Activity Log](#)

Process Option: [Contract Activities](#) [Document Status](#)

Vendor: [Vendor Search](#) [Primary Contact Info](#) [Thresholds & Notifications](#)

*Vendor ID: [SUBURBAN STATIONERS INC](#) [Contract Releases](#)

*Begin Date:

Expire Date:

Renewal Date:

Currency:

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt

Amount Summary

Maximum Amount:	<input type="text" value="100,000.00"/>	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
PCard Swipe Amount:	0.00	
Total Released Amount:	0.00	

Begin Date: The Begin Date of the contract defaults in with today's date. If you enter a future begin date, this contract will not be available for selection in the Contract ID field of Purchase Orders until the begin date.

Expire Date: This is the date that the contract ends. After that expiration date has passed, the contract is no longer available for selection in the Contract ID field of Purchase Orders. In the future, this field will also be used to archive data off the system.

Renewal Date: This field is optional. The date the contract is up for renewal.

Supplier Contract Ref: This field is optional. The field size is 30 characters.

Description: The Description field is optional for use. The field size is 30 characters. This field is viewable when searching the supplier contracts field in online PO creation. It is good practice to utilize the Description field.

Master Contract ID: This field is not used.

Tax Exempt: Do not update this field, it will default from the PO Defaults.

Maximum Amount: Enter the maximum amount that can be released and paid against this contract.

3. The following fields need to be entered or updated in the **Order Contracts Options** Section:

Order Contract Options ?

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date

Corporate Contract Adjust Supplier Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order

[PO Defaults](#) [OPM Reporting](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

- If the contract that you are creating is only for your agency's use, uncheck the **Corporate Contract** checkbox (the Corporate Contract checkbox is used for DAS statewide contracting. Selecting this checkbox allows all Business Units to utilize the contract and the Business Unit on the PO Defaults link is set to DASM1).
- **Lock Chartfields** Do not check this field, this will **not** allow you to change values on the Distribution lines of your PO.
- The **Allow Open Item Reference** should **NEVER** be selected for POC/N, PSC/N or SCS contract types, if selected you will not be able to save the contract. For other contract types, selecting this checkbox would allow the purchase of all items from this vendor within the scope of the supplier contract.
- Select the **Price Can Be Changed on Order** checkbox; this will allow PO change orders to be created for POs associated with this contract.

For PSC/N and POC/N type contracts click on the OPM Reporting Link.

OPM Approval Number: If this was converted from a POS/PSA Requisition the Requisition Business Unit and Req ID will automatically populate. If there is an amendment or you are creating the contract manually, you will manually enter the Requisition Business Unit and Req ID.

- If your contract falls below the dollar thresholds, and OPM Approval is not required, type **Not Reqd** in this field.

SetID	STATE	Contract ID	Version
1		19DSS13960PSA01	1

Entered Date	Entered by	*Requisition Business Unit	*OPM Approval No. (Req. ID)	OPM Contracted Entity	OPM Statutory Reference	Approval Source
12/27/2019	BATCH	DSSM1	0000013960	Not Applicable	Not Applicable	OPM Approved

OPM Contracted Entity: select entity from the dropdown menu.

SetID	STATE	Contract ID	Version
1		18DSS13676POS01	1

Entered Date	Entered by	*Requisition Business Unit	*OPM Approval No. (Req. ID)	OPM Contracted Entity	OPM Statutory Reference
12/30/2019	BATCH	DSSM1	0000013676	Not Applicable	Not Applicable

OPM Statutory Reference: select reference from the dropdown menu.

Contract ID	Version
18DSS13676POS01	1

Entered by	*Requisition Business Unit	*OPM Approval No. (Req. ID)	OPM Contracted Entity	OPM Statutory Reference
BATCH	DSSM1	0000013676	Not Applicable	Not Applicable

- | | |
|----------------|---|
| CGS 13B-20B | Consultant Services, DOT |
| CGS 4A-50 | Contractual Services |
| CGS 4B-55 | Consultant Services, Construction |
| CGS 4D-2 | Consultant Services, use w/contract type SCS only |
| Not Applicable | When the Statutory Reference is not one of selections listed above. |


Please refer to the statutes for a more detailed explanation.

Click  once you have entered data in the three required fields.

Click on [PO Defaults](#) (This is **mandatory**, even if you are not entering default coding here).

The PO Defaults page will open. Verify that your agency business unit has defaulted in the **Business Unit** field. *If DASM1 defaults in, you will need to change this to your agency's business unit.*

Your **AM Business Unit** may default in. If not, enter manually, only if an Asset is involved.

If your agency has multiple Business Units that should transact utilizing this contract, use the plus button  to add additional Business Units that would have access to this contract.

You will see that the **Payment Terms ID** is populated with 000 (Due Immediately – No Discount). If your supplier has offered a different pay term, select the appropriate pay term from the list.

x
Help

	SetID	STATE	
Payment Terms ID	begins with ▼		<input type="text"/>
Short Description	begins with ▼		<input type="text"/>
Description	begins with ▼		<input type="text"/>
Payment Terms Type	= ▼		<input type="text"/>

Look Up
Clear
Cancel
Basic Lookup

Search Results

View 100 First ◀ 1-130 of 130 ▶ Last

Payment Terms ID	Short Description	Description	Payment Terms Type
\$DISC	Dollr Disc	Dollar Discount	Single
000	Due Now	Due Immediately - No Discount	Single
00312	.003/10-25	0.3% Disc In 10 Days Net 25	Single
00314	.003/10-45	0.3% Disc In 10 Days Net 45	Single
00522	.005/2025	0.05% in 20 Days Net 25	Single
00524	.005/2045	0.05% in 20 Days Net 45	Single
01012	.0010/1025	0.10% in 10 Days Net 25	Single
01014	.0010/1045	0.10% in 10 Days Net 45	Single
02412	.2451/1025	0.2451%Disc In 10 Days Net 25	Single
02414	.2451/1045	0.2451%Disc In 10 Days Net 45	Single
025	Net 25	Net 25 - No Discount	Single
02502	.0025/1025	0.25% in 10 Days Net 25	Single
02504	.0025/1045	0.25% in 10 Days Net 45	Single
02510	.0025/1030	0.25% in 10 Days Net 30	Single
02512	.0025/1525	0.25% in 15 Days Net 25	Single
02513	.0025/1530	0.25% in 15 Days Net 30	Single
02514	.0025/1545	0.25% in 15 Days Net 45	Single
02522	.0025/2025	0.25% in 20 Days Net 25	Single

If your PO from this contract is to be amount only, then you would need to change the Charge By field from Quantity to Amount.

The screenshot shows the 'Shipping Information' section of a form. The 'Charge By' field is highlighted with a red box and is set to 'Amount'. Other fields include 'Ship To', 'Location', 'IN Unit', 'Freight Terms' (set to 'FOB DEST'), 'Ship Via', 'AM Business Unit', 'Profile ID', 'Cost Type', 'Ultimate Use Code', and 'Where Performed'. There is also a 'Capitalize' checkbox.

Do not enter Chartfield information on the PO defaults page. Enter it directly on the distribution for each contract line that is entered.

Click 

You will return to the Contract Entry Page.

4. Go to **Contract Items**.

Enter a clear description of 10 words or less of the good or service contracted for in the **Description** field (max 254 characters). Agencies can reference their program tree to assist in a standard description. For PSC/N, POC/N and SCS CT Contract Types, these are required fields. You will not be able to save your contract if these fields are not entered. Add an additional line for each contracted service.

The screenshot shows the 'Contract Items' page. The 'Description' field for line 1 is highlighted with a red box and contains the text 'Copy Paper Blue.'. The table has columns for Line, Item, Description, UOM, Category, Include for Release, and Status. The status is 'Active'. There are also search and navigation options at the top.

(To view the entire description, click . This will open an expanded window view.)

Contract Entry

Copy Paper Blue, 8.5x11, 500 sheets per ream, 10 reams per case - 20# weight

Return

Click [Return](#) to return back to Contract Entry

Enter the **UOM** - Unit of Measure. This field must be entered.
Click on the magnifying glass to choose from the list.

Contract Items

Catalog Search Item Search Search for Contract Lines

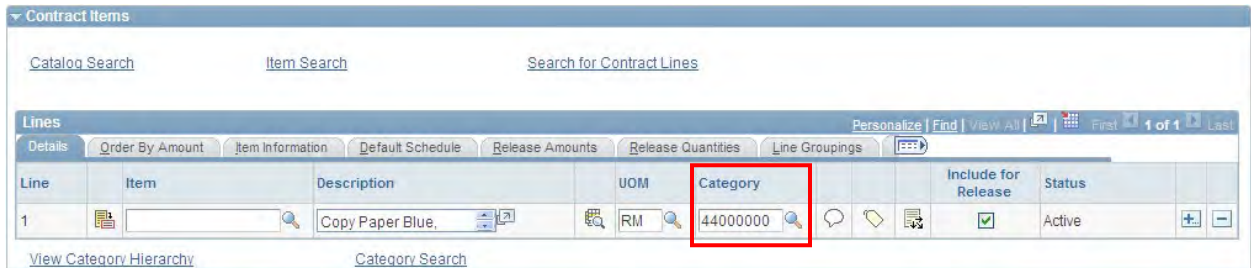
Lines

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

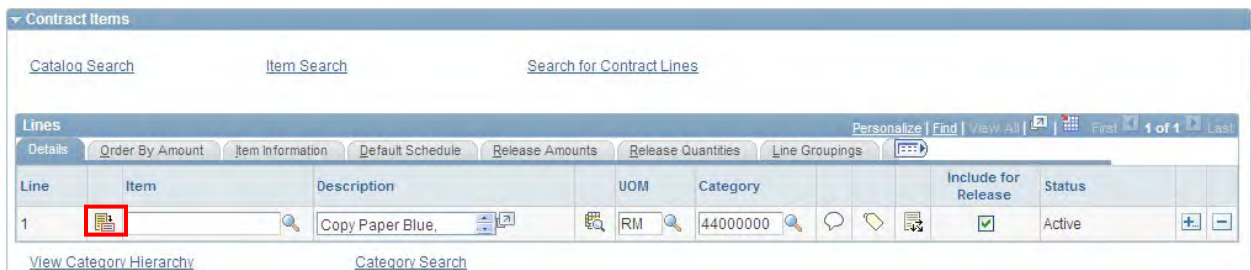
Line	Item	Description	UOM	Category	Include for Release	Status
1		Copy Paper Blue.	RM	44000000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

Enter the correct **Category**. This will bring in the account on the PO. This can be changed if necessary. **Use of the category 00000000 or CT_UNSPSC is unacceptable on any contract, PO or requisition. These values were included for use by requesters on requisitions if they did not know the correct category. It is the responsibility of the Approvers to apply the correct category code.**



Click the **Line Details** icon to access all tabs.



Contract Entry

Details for Line 1

Contract ID: 05DOT9999AB Version: 1 Vendor: ████████████████████

Line: 1 Item ID: [Copy Paper Blue](#)

Line Details

Category: 44000000 ✗

Description: Status: Active

Category ID: 00051 Physical Nature:

Transaction Item Description:

Expand All [Collapse All](#)

▾ Item Information

▾ Release Amounts / Quantities

▾ Pricing Information

OK Cancel Refresh

Select [Expand All](#) to view all tabs on one page.

[Expand All](#)
[Collapse All](#)

Item Information

Vendor's Catalog: Device Tracking
 Vendor Item ID:
 Manufacturer ID:
 Description:
 Manufacturer's Item ID:
 UPN ID:

Release Amounts / Quantities

Minimum Line Amount: <input type="text"/>	Minimum Line Quantity: <input type="text"/>
Maximum Line Amount: <input type="text"/>	Maximum Line Quantity: <input type="text"/>
Total Line Released Amount: 0.000	Total Line Released Quantity: 0.00
Remaining Amount: USD	Remaining Quantity: 0.0000 RM
Remaining Amount %:	Remaining Quantity %: 0.00

Pricing Information

Use Contract Base Price Use Vndr Price UOM Adjustments
 Price Can Be Changed on Order Use Vendor Price Shipto Adjust
 Price Date:
 Price Qty:
 Qty Type:
 Adjust:
Order By Amount
 Amount Only
 Merchandise Amount:

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing						Personalize Find View All First 1 of 1 Last
	Price Loc	UOM	Base Price	Curr		
<input checked="" type="checkbox"/>	MAIN	RM	0.00000	USD	+	-

Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Shipping Template					Personalize Find View All First 1 of 1 Last
	Lead Time	Time Due	*Qty Sched	UOM	
<input type="text"/>	0	<input type="text"/>	1.0000	RM	+

OK
Cancel
Refresh

- Enter the Maximum line amount if applicable
- Leave the Minimum and Maximum line quantity blank

Release Amounts / Quantities

Minimum Line Amount: <input type="text"/>	Minimum Line Quantity: <input type="text"/>
Maximum Line Amount: <input type="text"/>	Maximum Line Quantity: <input type="text"/>
Total Line Released Amount: 0.000	Total Line Released Quantity: 0.00
Remaining Amount: USD	Remaining Quantity: 0.0000 RM
Remaining Amount %:	Remaining Quantity %: 0.00

Select the appropriate choice (goods or services) in the **Physical Nature** field

Line Details	
Category:	44000000
Description:	Status: Active
Category ID:	00051
	Physical Nature: Goods
Transaction Item Description:	
Copy Paper Blue, 8.5x11, 500 sheets per ream, 10 reams per case - 20# weight	

Place a check in the checkbox for **Price Can Be Changed on Order**.

Pricing Information	
<input checked="" type="checkbox"/> Use Contract Base Price	<input type="checkbox"/> Use Vndr Price UOM Adjustments
<input checked="" type="checkbox"/> Price Can Be Changed on Order	<input type="checkbox"/> Use Vendor Price Shipto Adjust
Price Date: Due Date	Adjust: Before Contract Adjustments
Price Qty: Line Quantity	Order By Amount
Qty Type: Current Order Quantity	<input type="checkbox"/> Amount Only
	Merchandise Amount: <input type="text"/>

FOR AN AMOUNT ONLY CONTRACT:

Order by Amount - If this is amount only, check the Amt Only checkbox.
Reconfirm that you have selected Amount in the Charge By field on the PO Defaults.

Merchandise Amt - enter the amount for the line.

Pricing Information	
<input checked="" type="checkbox"/> Use Contract Base Price	<input type="checkbox"/> Use Vndr Price UOM Adjustments
<input checked="" type="checkbox"/> Price Can Be Changed on Order	<input type="checkbox"/> Use Vendor Price Shipto Adjust
Price Date: Due Date	Adjust: Before Contract Adjustments
Price Qty: Line Quantity	Order By Amount
Qty Type: Current Order Quantity	<input checked="" type="checkbox"/> Amount Only
	Merchandise Amount: 1,000.00

FOR A QUANTITY CONTRACT:

UOM/Pricing – enter a **Base Price** equal to the price for this line

Enter MAIN for the **Price Loc** (Pricing Location).

UOM/Pricing					
Price Loc	UOM	Base Price	Curr		
<input checked="" type="checkbox"/>	MAIN	RM	9.99	USD	

Click .

You will be returned to the Contract Header Page.

Repeat the steps above for each contract line entered.

Click on the **PO Distributions Details** icon.

Contract Items									
Office Equipment and Accessori									
Line	Item	Description	UOM	Category			Include for Release	Status	
1		Copy Paper Blue,	RM	44000000			<input checked="" type="checkbox"/>	Active	

Fill in the appropriate chartfield information here.

Contract Entry														
PO Distributions for Line 1														
Contract: 05DOT9999AA Version: 1 Line: 1 blah blah blah office supplies 100.000														
Distribution By Business Unit														
Business Unit: DOTM1 SpeedChart: <input type="button" value="+"/> <input type="button" value="-"/>														
Distribution														
Dist	Dist Merch	Percent	GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud Ref	PC Bus	Project	Activity
		100.00	100.00000	STATE										

Select to add additional distribution lines.

Find View All First 1 of 1 Last					
Personalize Find View All First 1 of 1 Last					
Activity	Source Type	Category	Subcategory	Location	Stat

Repeat this step for each contract line entered. It is mandatory that agencies enter Chartfield values on the distribution line for each line of the contract.

This will copy to the PO when utilizing the Copy from Contract feature when creating an online purchase order.

Click  when you are done

You will be taken back to the Contract Page.

New Print

Contract

Contract Entry
Contract

SetID:	STATE Copy From Contract	<div style="display: flex; justify-content: space-between;"> Contract Version </div>	
Contract ID:	05DOT9999AB	Version:	1 Status: Current
*Status:	Open ▼	New Version	Approval Due Date: <input type="text"/>
Administrator/Buyer:	<input type="text"/>		

▼ Header

CT Contract Type: [Add Comments](#)

Process Option: [Activity Log](#)

Vendor: [Vendor Search](#) [Contract Activities](#)

*Vendor ID: [SUBURBAN STATIONERS INC](#) [Document Status](#)

*Begin Date: [Primary Contact Info](#)

Expire Date: [Thresholds & Notifications](#)

Renewal Date:

Currency: [CRRNT](#) [Contract Releases](#)

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt

Amount Summary

Maximum Amount:	100,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
PCard Swipe Amount:	0.00	
Total Released Amount:	0.00	

▼ Order Contract Options

<input type="checkbox"/> Allow Multicurrency PO	<input type="checkbox"/> Allow Open Item Reference	<input type="checkbox"/> Must Use Contract Rate Date	Rate Date: 02/14/2013
<input checked="" type="checkbox"/> Corporate Contract	<input type="checkbox"/> Adjust Vendor Pricing First	<input checked="" type="checkbox"/> Auto Default	
<input type="checkbox"/> Lock Chartfields	<input type="checkbox"/> Price Can Be Changed on Order	*Dispatch Method: <input type="text" value="Print"/> <input type="button" value="Dispatch"/>	

[PO Defaults](#) [OPM Reporting](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

Line	Item	Description	UOM	Category	Include for Release	Status
1		blah blah blah office	RM	44000000	<input checked="" type="checkbox"/>	Active

Line	Category	Description	Status
1			Active

Place the contract in approved status by updating the **Status** field if you have the authority to do so. If you do not have the authority to approve a contract, leave the contract in Open status and contact the appropriate person in your agency who can approve this contract.

Click  Save to save the contract.

Updated 08/25/2022