Contracts

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

Eavorites Main Menu	÷		
Core-CT HRMS Personal I Self Service Worklist Revie Revie Personal Cols Revie Revie Personal Cols Revie Revi	 Employee Self-Service Supplier Contracts Customer Contracts Items Vendors 	abor aprove time.	
Et Change My Password My Personalizations Er My System Profile	 Procurement Contracts Purchasing Inventory Spectrument 	Review Contract Information	•
 Name Change Ethnic Groups My System Profile Set up personal preferences, such as er 	 eProcurement Services Procurement Project Costing Billing 	 int and prior paychecks. <u>check Information</u> 	

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 Add 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 <u>Copy From Contract</u>. 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 Search.

Copy Contract ID							×
Contract Entry							neip
Copy Contract							
SetID STATE Contract ID 20DOT0001AA Contract Search							
	Q Q	Q	Master Contract ID		Q en Item Reference		
Select Contract Contracts More Details				I	Personalize Find	🗖 🔣 🛛 First 🕚	1 of
	/ersion	Description		Supplier ID	Short Supplier Name	Supplier Contract Ref	
OK Cancel Refresh							
<							

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

Check the box next to the contract, then click $\bigcirc K \bigcirc K$.

Copy Contract ID					×
					Help
Contract Entry					
Copy Contract					
SetID STATE					
Contract ID 20DOT0001AA					
		- 0			
Contract ID 14DOT0002AA		Q Master Contract ID		Q	
Supplier	Q		Allow Op	en Item Reference	
Supplier ID	Q				
Search					
Select Contract				Personalize Find	2 🔣 F
Contracts More Details	•				
Sel Contract ID	Version	Description	Supplier ID	Short Supplier Name	Supplier Contract
2 14DOT0002AA	1	7.15-01(13) 172-405	0000035534	231575527F-001	
OK Cancel Refre	esn				
<					>
					.:

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

Contract Ct Cntrct Justify							•	•
Contract Entry								
Contract								
SetID STATE	Copy From Contract	Contrac	t Version					
Contract ID 20DOT0			Version 1			Status	Current	
*Status Open	\checkmark		101011		Арр	roval Due Date		H
Administrator/Buyer	Q						Add a Do	cument
State Identified Contract Type Statutory	Contractual Services							
THeader ③								
*Contract Style Purchas	e Order		Add Comments		А	ctivity Log		
Process Option Purchas			Contract Activities			ocument Status		
*Supplier 2315755	527F-001 Q Supplier Search		Primary Contact Info)	Т	hresholds & Notifi	cations	
*Supplier ID 0000035	5534 URBAN ENGINEERS	INC	Contract Header Agr	reement				
	020 📴		Contract Releases Custom Fields					
*Begin Date 02/20/20 Expire Date 12/31/20			Custom Fields					
Renewal Date	31		Amount Summary	1 3				
Currency USD			Max	timum Amo	ount	1.061	1,170.00 US	n.
Primary Contact			Line Item Rel				0.00	U
Supplier Contract Ref	-		Category Rel	eased Amo	ount		0.00	
Description 7.15-01	(12) 172-405		Open Item Rel				0.00	
Master Contract ID	(13) 172-403 Q		Non-PO PCard				0.00	
Tax Exempt ID				eased Amo	ount		0.00	
	Exempt							
Order Contract Options 🕜								
Allow Multicurrency PO	Allow Open Item Reference		Must Use Contr	act Rate D	ate	R	ate Date 09/	/18/2013
Corporate Contract	Adjust Supplier Pricing First		Auto Default					
Lock Chartfields	Price Can Be Changed on Or	der						
PO Defaults OPM Reporting	Add Open Item Price	Adjustments	Price	Adjustmen	t Temp	ate		
Contract Items								
Catalog Search Item S	earch Sear	rch for Contr	act Lines					
								0
Lines Details Order By Amount Item Info	rmation Default Schedule Rele	ase Amount		· · ·	Group	iew All 🖾 📑		🖲 1 of 1 🕑 L ====)
Details Order By Amount Item Info	mation Delauit Schedule Rele	ase Amount	s <u>R</u> elease culantiti	es <u>L</u> ine	Group	-		
Line Item De	escription	UOM	Category			Include for Release	Status	
1 📑 🔍 T	o perform Construction	EA Q	81000000	\Diamond		¥ 🔽	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 icon⁴.

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:

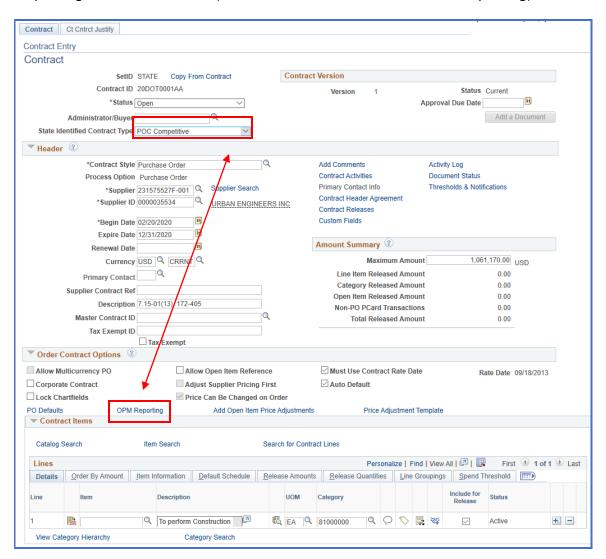
CT Contract Type: There are several types of contracts for selection and this step is very important to identify correctly. Contract type has an impact on the PO type to be selected on your Purchase Order Header Details Page.

- 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) <u>is used when GL is the</u> <u>delegated purchasing authority.</u>
- 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.

Favorites Main Menu Procurement Contracts	Add/Upda	ate (Contracts									
								Home	1.1	Norklist	Add to F	avorites
ORACLE'												
										lew Windo	ow Help	Personalize
Contract Ct Cntrct Justify												
Contract Entry												
Contract	7											
SetII Construction			Contract	Version								
Contract ID General Letter				Version 1	1			St	tatus	Current		
*Status Loan							A	pproval Due	Date		31	
Administrator/Buye MOU Master Agreement										Add a	Document	
State Identified Contract Type POC Competitive												
PON Noncompetitive PSC Competitive												
PSN Noncompetitive *Contract Style Rental Lease	Q			Add Comments				Activity Log				
Process Option Rights of Way				Contract Activities				Document St	tatus			
Standardization Transaction *Supplier Statewide Award	ch			Primary Contact Info	fo			Thresholds &	& Notif	fications		
*Supplier 12 Statutory Contractual Services	INEER	S IN	IC	Contract Header Ag	gree	ment						
*Begin Date 02/20/2020				Contract Releases Custom Fields								
Expire Date 12/31/2020				oustonn rioldo								
Renewal Date				Amount Summary	y (2						
Currency USD Q CRRNT Q				Max	xim	um Amo	ount		1,06	1,170.00	USD	
Primary Contact				Line Item Rel	eleas	sed Amo	ount			0.00		
Supplier Contract Ref				Category Rel						0.00		
Description 7.15-01(13) 172-405				Open Item Rel Non-PO PCar						0.00		
Master Contract ID	Q			Total Rel						0.00		
Tax Exempt ID												
Tax Exempt												
▼ Order Contract Options ③				_								
Allow Multicurrency PO				Must Use Cont	trac	t Rate D	ate		R	ate Date	09/18/2013	
Corporate Contract Adjust Supplier P	-			Auto Default								
Lock Chartfields Price Can Be Cha	-											
PO Defaults OPM Reporting Add Oper	n Item Pric	e Ad	ijustments	Price	e Ad	ljustmen	t len	nplate				
Catalog Search Item Search	Sea	arch	for Contra	act Lines								
Lines				Per	rson	alize F	ind	View All	1	Firs	t 🕚 1 of	1 🕑 Last
Details Order By Amount Item Information Default Sched	ule <u>R</u> e	leas	e Amount							hreshold		
Line Item Description			UOM	Category				Includ Rele		Status		
1 To perform Construction	2	F.	EA Q	81000000	ς) (V	R	¥¥ 🖸	2	Active		+

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)



Supplier Search

Supplier Search			
earch Criteria			
Name		Short Name	
Alternate Supp Name			
City		State	
Country	Q	Postal	
Class	Q	Type dm Q	
Max Rows	10	0	
Search			
arch Results 🔻		Personalize Find View All 🔄 📑	First 1 of 1 East
d Supplier ID Addre	ss Short Supplier Name	Supplier Name	Withholding Applicable

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

Supp	lier Search					
_						
Searc	h Criteria					
		Name suburba	in	Short Name		
	Alternate Supp I	Name				
		City		State	Q	
	Co	untry	Q	Postal		
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	Max	Rows	10			
S	earch			10 of 25 🔣 📢 🕨 🗎		2
	d		1 to			
Searc	h Results 🔎			Personalize Find	I View All 🔄 🔣	First 🕢 1-4 of 10 🕟 Last
Sel	Supplier ID	Address	Short Supplier Name	Supplier Name		Withholding Applicable
	0000010009	1	SUBURB3422-001	SUBURBAN STAT	IONERS INC	N
	0000010291	1	SUBURB8829-001	SUBURBAN SANI	TATION SERVICE INC	Ν
	0000010291	2	SUBURB8829-001	SUBURBAN SANI	TATION SERVICE INC	N
	0000010291	3	SUBURB8829-001	SUBURBAN SANI	TATION SERVICE INC	Ν
C Supplie	0000010291 r Detail Addre	-	SUBURB8829-001	SUBURBAN SANI	TATION SERVICE INC	Ν
0	K Cancel	Refresh				

Results returned will show in the Search Results view.

To view information about the supplier; place a check in the Sel checkbox and click Supplier Detail or Address

Supplier Detail								[
								Hel
	SetID	STATE	Supplier ID 00000100	009		Supplier Status	Approved	
Short	Supplier Name	SUBURB3422	-001		Supplie	er Classification	Supplier	
	In City Limit	N				HR Class		
A	dditional Name					Persistence	Regular	
Altern	ate Supp Name				Ор	en For <mark>Ordering</mark>	Y	
	Address	00001	693 HIGH ST		Withhol	lding Applicable	Ν	
Cor	porate Supplier	0000010009	SUBURBAN STATION	NERS INC	C)isplay VAT Flag	Ν	
	Remit Supplier	0000010009	SUBURBAN STATION	NERS INC				
Supplier Types			P	ersonalize	Find View All 🔄 🔣	First 🕢 1 o	f 1 🕟 Las	t
Type Lon	ng Name							
1								
ок	Cancel Ref	resh						

Address				
SetID:	STATE	Vendor ID:	0000010009	
Country: Address Address		USA United States 693 HIGH ST	3	
Address				
City:		MIDDLETOWN		
County:			Postal:	06457
State: OK	Cance	CT Connect	icut	

Click or <u>Cancel</u> to return you to the previous screen, so you can select the supplier for the Contract.

Searc	h Criteria				
		Name suburba	an	Short Name	
	Alternate Sup	p Name			
		City		State Q	
		Country	Q	Postal	
		Class	Q	Туре	G₂
	Ma	ax Rows	10		- 0
S	earch		1 to 10	0 of 25 🖪 📢 🕨 🕨	
earc	h Results 🔎			Personalize Find View All 🔄 📑	First 🕢 1-4 of 10 🕑 Last
Sel	Supplier ID	Address	Short Supplier Name	Supplier Name	Withholding Applicable
~	000010009	1	SUBURB3422-001	SUBURBAN STATIONERS INC	Ν
	0000010291	1	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	Ν
	0000010291	2	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	Ν
	0000010291	3	SUBURB8829-001	SUBURBAN SANITATION SERVICE INC	N

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:

CT Contract Type:	POC Comp 🗸	Add Comments	Activity Log
Process Option:	Purchase Order	Contract Activities	Document Status
Vendor:	Vendor Search	Primary Contact Info	Thresholds & Notifications
*Vendor ID:	0000010009 SUBURBAN STATIONERS INC	Contract Releases	
*Begin Date:	01/14/2013	onnacricicasco	
Expire Date:	01/14/2014	Amount Summary	
Renewal Date:	E E	Maximum Amount:	100,000.00 USD
Currency:		Line Item Released Amount:	0.00
Drimany Contact:		Category Released Amount:	0.00
		Open Item Released Amount:	0.00
Vendor Contract Ref:		PCard Swipe Amount:	0.00
Description:	POC For Office Supplies	Total Released Amount:	0.00
Master Contract ID:			
Tax Exempt			

Begin Date: The Begin Date of the contact 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 Optic	ons 👔		
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 Adjustm	Price Adjustment Template

- If the contract that you are creating is <u>only</u> 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.

Order Contract Optio	ns 🕐		
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

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 19DSS13960PSA01	Version 1		
Entered Date	Entered by	*Requisition Business Unit	*OPM Approval No. (Reg. ID)	Personalize Find View All (2) R First 1 of 1 2 OPM Contracted Entity OPM Statutory Reference Approval Source
1 12/27/2019	BATCH	DSSM1	0000013960	Not Applicable V Not Applicable V OPM Approved

OPM Contracted Entity: select entity from the dropdown menu.

SetID STATE	Contract ID 18DSS13676POS01	Version 1			
Entered Date	Entered by	"Requisition Business Unit	*OPM Approval No. (Req. ID)	Federal Agency Non Profit	te Find View All 🗐 💽 OPM Statutory Reference
1 12/30/2019	BATCH	DSSM1	0000013676	Not Applicable Political Subdivision Proprietary State Agency	Not Applicable

OPM Statutory Reference: select reference from the dropdown menu.

Contract ID 18DSS13676POS01	Version 1			
			Personaliz	CGS 13B-20B CGS 4A-50
Entered by	*Requisition Business Unit	*OPM Approval No. (Req. ID)		CGS 4B-55 CGS 4D-2 - Consultant Service
BATCH	DSSM1	0000013676	Not Applicable V	Not Applicable

CGS 13B-20BConsultant Services, DOTCGS 4A-50Contractual ServicesCGS 4B-55Consultant Services, ConstructionCGS 4D-2Consultant Services, use w/contract type SCS onlyNot ApplicableWhen the Statutory Reference is not one of selections listed above.

Please refer to the statutes for a more detailed explanation.

Click

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

Click on <u>PO Defaults</u> (This is **mandatory**, even if you are not entering default coding here).

Order Contract Optic	ons 🕐		
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

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, <u>only if an Asset is</u> <u>involved.</u>

Contract Entry					
PO Defaults					
SetID: STATE Contract	ID: 05DOT9999	AA Ver	sion: 1	Vendor ID:	0000010009
Header				Find View All Fir	st 🛙 1 of 1 🖸 Last
*Business Unit:	ротм1		Copy from BU Defaults		+ -
Vendor Loc:	MAIN				1
Buyer:		Q			
Origin:	915 🔍				
Currency:			Billing Location:	DOTM1ADD	
Payment Terms ID:	000		Tax Exempt	0660007981	ООТ
Shipping Information			_		
Ship To:	Q	Ship To Address	AM Business Unit:		
Location:	Q			Capitaliz	
IN Unit:	Q		Profile ID:		
Freight Terms:	FOB DEST		Cost Type:		Q
Ship Via:	Q		Ultimate Use Code:		٩
Charge By:	Quantity 💙		Where Performed:		*
Distributions			P	ersonalize Find View All	ן ₪ן 🔛
*GL Unit Fund Dept	SID	Program Account	ChartField 1 Ch	hartField 2 Bud Ref	PC Bus Unit
STATE Q					
<					>
Add Comments					
OK Cancel Re	efresh		/		

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.

Look Up F	Payment Terms I	D		
			Help	
	SetID	STATE		
Payment 1	Terms ID begins wit	th 🗸		
Short De	scription begins wit	th 🗸		
	scription begins wit			
Payment Ter	ms Type =	~	*	
Look Up	Clear	Cancel Basic Lookup		
Search Res	culto			
	suits	First ()		
View 100			1-130 of 130 🕑 Last	
-	ns ID Short Description		Payment Terms Type	
\$DISC	Dollr Disc	Dollar Discount	Single	
000	Due Now	Due Immediately - No Discount	-	
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	
04044	.0010/1045	0.10% in 10 Days Net 45	Single	
01014	.0010/1045	c. re re in re Daye riet re	ongio	
	.2451/1025	0.2451%Disc In 10 Days Net 25	_	
02412		-	Single	
01014 02412 02414 025	.2451/1025	0.2451%Disc In 10 Days Net 25	Single	
02412 02414 025	.2451/1025 .2451/1045	0.2451%Disc In 10 Days Net 25 0.2451%Disc In 10 Days Net 45	Single Single	
02412 02414 025 02502	.2451/1025 .2451/1045 Net 25	0.2451%Disc In 10 Days Net 25 0.2451%Disc In 10 Days Net 45 Net 25 - No Discount	Single Single Single Single	
02412 02414	.2451/1025 .2451/1045 Net 25 .0025/1025	0.2451%Disc In 10 Days Net 25 0.2451%Disc In 10 Days Net 45 Net 25 - No Discount 0.25% in 10 Days Net 25 0.25% in 10 Days Net 45	Single Single Single Single	
02412 02414 025 02502 02504 02510	.2451/1025 .2451/1045 Net 25 .0025/1025 .0025/1045	0.2451%Disc In 10 Days Net 25 0.2451%Disc In 10 Days Net 45 Net 25 - No Discount 0.25% in 10 Days Net 25 0.25% in 10 Days Net 45 0.25% in 10 Days Net 30	Single Single Single Single Single	
02412 02414 025 02502 02504	.2451/1025 .2451/1045 Net 25 .0025/1025 .0025/1045 .0025/1030	 0.2451%Disc In 10 Days Net 25 0.2451%Disc In 10 Days Net 45 Net 25 - No Discount 0.25% in 10 Days Net 25 0.25% in 10 Days Net 45 0.25% in 10 Days Net 30 0.25% in 15 Days Net 25 	Single Single Single Single Single Single	
02412 02414 025 02502 02504 02510 02512	.2451/1025 .2451/1045 Net 25 .0025/1025 .0025/1045 .0025/1030 .0025/1525	0.2451%Disc In 10 Days Net 25 0.2451%Disc In 10 Days Net 45 Net 25 - No Discount 0.25% in 10 Days Net 25 0.25% in 10 Days Net 45 0.25% in 10 Days Net 30	Single Single Single Single 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.

Shipping Information				
Ship To:		Ship To Address	AM Business Unit:	
Location:		2		Capitalize
IN Unit:		2	Profile ID:	
Freight Terms:	FOB DEST	2	Cost Type:	
Ship Via:			Ultimate Use Code:	
Charge By:	Amount 💌		Where Performed:	~

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



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.

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Lines	-							-		Pe	rsonalize	Find View All	A Prist	1 of 1	Las
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(To view the entire description, click 2. This will open an expaned window view.)

Contract Entry	
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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.*

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Enter the correct **Category**. This will bring in the account on the PO. This can be changed if necessary. **Use of the category 0000000 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.

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Click the Line Details Elcon to access all tabs.

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Select Expand All to view all tabs on one page.

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

- Release Amounts / Quantities			
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Select the appropriate choice (goods or services) in the Physical Nature field

Line Details				
Category:	44000000			
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Place a check in the checkbox for Price Can Be Changed on Order.

Pricing Inform	nation			
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Price Qty:	Line Quantity	*	Order By Amo	
Qty Type:	Current Order Quantity	*	Amount On	
			Merchandise A	Amount:

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 Informati	on							
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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/Pric	ing			Personalize Find View	All 🚨 🛗 Fin	st 🚺 1 of 1 🛄 Lat
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Click OK

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.

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Fill in the appropriate chartfield information here.

Contract Entry	
PO Distributions for Line 1	
Contract: 05DOT9999AA Version: 1 Line: 1 blah blah office supplies 100.000	
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OK Cancel Refresh	

Select 🛨 to add additional distribution lines.

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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	OK	when	v
			v

when you are done

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*Vendor ID:	0000010009 SUBURBAN STATIONERS IN	IC <u>Contract Releases</u>
*Begin Date:	01/14/2013	
Expire Date:	01/14/2014	Amount Summary
Renewal Date:	BI	Maximum Amount: 100,000.00 USD
Currency:		Line Item Released Amount: 0.00
Primary Contact:		Category Released Amount: 0.00
Vendor Contract Ref:		Open Item Released Amount: 0.00 PCard Swipe Amount: 0.00
Description:	POC For Office Supplies	Total Released Amount: 0.00
Master Contract ID:		
🗹 Tax Exempt	066000798DOT	
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Allow Multicurrency PO	Allow Open Item Reference	Must Use Contract Rate Date Rate Date: 02/14/2013
Corporate Contract	Adjust Vendor Pricing First	Auto Default
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PO Defaults OPM Reporting	Add Open Item Price Adjustments	Price Adjustment Template

You will be taken back to the Contract Page.

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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