



Adding a Contract to a PO Line

Core-CT 9.2 has two options for associating a Contract ID to a line on a purchase order. The buyer can use the Contract Lookup to select the desired ID from a list of those available contracts the state has with the supplier. Alternately they can use the new Contract Search icon to look up the contract details before adding it to the line.

In this example a buyer adds the contract reference to both lines of a new PO using both Contract Lookup and Contract Search options.

Navigation:

Purchasing > Purchase Orders > Add / Update POs

Procedure:

1. In this example the buyer had completed the **PO Header** and added two line items to a new PO. She has completed the required information on the **Details** tab as shown.

Maintain Purchase Order
Purchase Order

Business Unit: DOTM1
PO ID: NEXT
Copy From: [Dropdown]

PO Status: Open
Budget Status: Not Chk'd
 Hold From Further Processing

Header

*PO Date: 10/12/2016
*Supplier: S41904151F-001
*Supplier ID: 0000064731
*Buyer: MarquesA
PO Reference: Cisco Products

Supplier Search
Supplier Details: EPLUS TECHNOLOGY INC
DOT-Marques, Aimee C

Doc Tol Status: Valid
Receipt Status: Not Recvd
*Dispatch Method: Email

Amount Summary

Merchandise	10,450.00	USD
Freight/Tax/Misc.	0.00	
Total Amount	10,450.00	
Obligation Amount	0.00	

Add Items From
Catalog | Purchasing Kit | Item Search

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		ADJ COMPUTER	10.0000	EA	26000000	995.00000	9,950.00	Open
2		COMPUTER DISPLAY	2.0000	EA	26000000	250.00000	500.00	Open

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View Approvals
*Go to: More ...

Save | Notify | Refresh | Add | Update/Display

2. Click the **Contract** tab to view the contract data fields for both lines

Maintain Purchase Order

Purchase Order

Business Unit DOTM1 PO Status Open
PO ID NEXT Budget Status Not Chk'd
Copy From Hold From Further Processing

Header

*PO Date 10/12/2016 Supplier Search Doc Tol Status Valid
*Supplier 541904151F.001 Supplier Details
*Supplier ID 0000064731 EPLUS TECHNOLOGY INC
*Buyer MarquesA DOT-Marques, Almee C
PO Reference Cisco Products

Receipt Status Not Recvd
*Dispatch Method Email

Amount Summary

Merchandise	10,450.00	USD	
Freight/Tax/Misc.	0.00		<input type="button" value="Calculate"/>
Total Amount	10,450.00		
Obligation Amount	0.00		

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions Procurement Group

Add Items From

Catalog Item Search
Purchasing Kit

Lines

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

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Release	Purchasing Authority	Milestone Line	Group ID
1		ADJ COMPUTER	STATE	16PSX0153AA		1		Contracts		
2		COMPUTER DISPLAY	STATE	16PSX0153AA				Contracts		

View Printable Version *Go to More ...
View Approvals

3. Click the **Look up Contract ID** button for line 1
4. All the **Approved** contracts for this vendor are listed, even those that are expired. Click the **Contract ID** link

Look Up Contract ID
Help

SetID STATE

Contract ID

Short Supplier Name

Description

Search Results

View 100 First 1-4 of 4 Last

Supplier Set ID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date	Contract Expire Date
STATE	0000064731	16PSX0153AA	541904151F-001	Approved	DOC#1 0000069582	10/05/2016	10/05/2016
STATE	0000064731	12PSX0431AA	541904151F-001	Approved	DASM1 0000001244	12/10/2013	12/09/2017
STATE	0000064731	12PSX0308AB	541904151F-001	Approved	DASM1 0000001102	12/06/2012	11/30/2016
STATE	0000064731	11BAA2273	541904151F-001	Approved	Cisco Phone Support Services	05/10/2011	05/09/2018

Maintain Purchase Order
New Window | Help | Personalize Page

Purchase Order

Business Unit DOTM1 PO Status Open

PO ID NEXT Budget Status Not Chk'd

Copy From

Header

*PO Date 10/12/2016

*Supplier 541904151F-001

*Supplier ID 0000064731

*Buyer MarquesA

PO Reference Cisco Products

Supplier Search

Supplier Details

EPLUS TECHNOLOGY INC

DOT-Marques, Aimee C

Doc Tol Status Valid

Receipt Status Not Recvd

*Dispatch Method Email

Amount Summary

Merchandise	10,450.00	USD
Freight/Tax/Misc.	0.00	
Total Amount	10,450.00	
Obligation Amount	0.00	

Add Items From

Catalog

Purchasing Kit

Lines

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Release	Purchasing Authority	Milestone Line	Group ID
1	<input type="button" value="Q"/>	ADJ COMPUTER	STATE	16PSX0153AA <input type="button" value="Q"/>		1	<input type="button" value="Q"/>	Contracts		
2	<input type="button" value="Q"/>	COMPUTER DISPLAY	STATE	16PSX0153AA <input type="button" value="Q"/>			<input type="button" value="Q"/>	Contracts		

View Printable Version *Go to

5. The alternative method for adding a contract to a line is to click the **Contract Search** icon while using the Contract Tab

Maintain Purchase Order
Purchase Order

Business Unit DOTM1
PO ID NEXT
Copy From [v]

PO Status Open
Budget Status Not Chkd
 Hold From Further Processing

Header ?

*PO Date 10/12/2016 Supplier Search
*Supplier 541904151F-001 Supplier Details
*Supplier ID 0000064731 EPLUS TECHNOLOGY INC
*Buyer MarquesA DOT-Marques, Almee C

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Email Dispatch

PO Reference Cisco Products

Amount Summary ?

Merchandise	10,450.00	USD	
Freight/Tax/Misc.	0.00		Calculate
Total Amount	10,450.00		
Obligation Amount	0.00		

Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions Procurement Group

Add Items From ?

Catalog Item Search
Purchasing Kit

Lines ?

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

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Release	Purchasing Authority	Milestone Line	Group ID
1	<input type="text"/>	ADJ COMPUTER	STATE	<input type="text"/>		1		Contracts		
2	<input type="text"/>	COMPUTER DISPLAY	STATE	<input type="text"/>				Contracts		

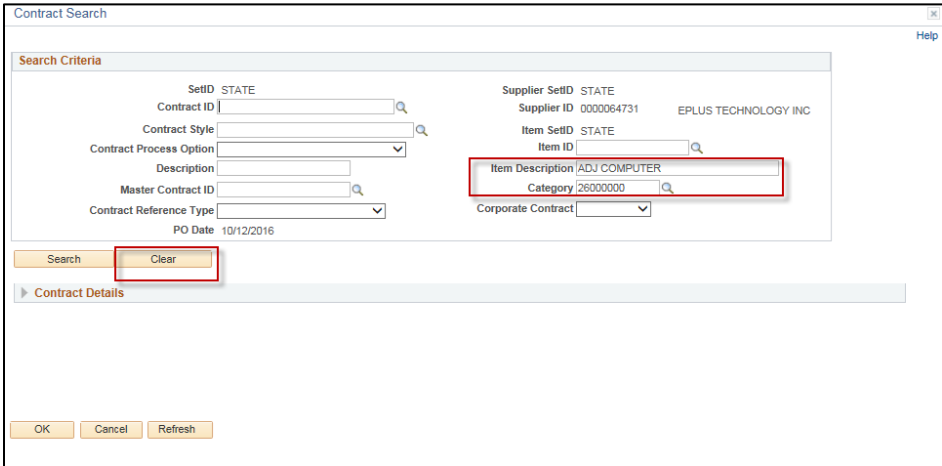
View Printable Version
View Approvals

*Go to [v] More ...

Save Notify Refresh

- 6. The **Contract Search** page displays. This is the same search available from the **Procurement Contracts** module
- 7. Core-CT populates the **Item** and **Category** fields from the line. These need to be cleared prior to searching for the State contracts for this vendor ID.

Click the **Clear** button to clear all the fields



8. Click the **Search** button

The screenshot shows a web application window titled "Contract Search" with a "Help" link in the top right corner. The main area is divided into two sections: "Search Criteria" and "Contract Details". The "Search Criteria" section contains several input fields and dropdown menus, including "SetID" (STATE), "Contract ID", "Contract Style", "Contract Process Option", "Description", "Master Contract ID", "Contract Reference Type", "PO Date" (10/12/2016), "Supplier SetID" (STATE), "Supplier ID" (0000064731), "EPLUS TECHNOLOGY INC", "Item SetID" (STATE), "Item ID", "Item Description", "Category", and "Corporate Contract". Below these fields are two buttons: "Search" and "Clear". The "Search" button is highlighted with a red rectangular box. The "Contract Details" section is currently collapsed, indicated by a right-pointing arrow. At the bottom of the window are three buttons: "OK", "Cancel", and "Refresh".

9. The search will only return active contracts for this vendor

Click the **Contract Detail** tab to review more information

The screenshot shows a 'Contract Search' window with a 'Search Criteria' section containing various input fields for SetID, Contract ID, Contract Style, Contract Process Option, Description, Master Contract ID, Contract Reference Type, PO Date, Supplier SetID, Supplier ID (0000064731), Item SetID, Item ID, Item Description, Category, and Corporate Contract. Below the search criteria are 'Search' and 'Clear' buttons. The 'Contract Details' section is active, showing a table with columns: Select, Contract ID, Contract Version, Contract Reference Type, Category, Item ID, Item Description, Contract Base Price, and Use Contract Base Price. The table contains three rows of data, with the first row's Contract ID '16PSX0153AA' highlighted by a red box. At the bottom of the table are 'OK', 'Cancel', and 'Refresh' buttons.

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price
<input type="checkbox"/>	16PSX0153AA	1	Open Item					
<input type="checkbox"/>	12PSX0431AA	1	Open Item					
<input type="checkbox"/>	12PSX0308AB	2	Open Item					

10. The **Contract Detail** tab displays the basic details for the contracts listed

Click the **Contract ID** link to review the full contract

The screenshot shows the 'Add/Update Contracts' page in the Core-CT Financials system. The breadcrumb trail is: Favorites > Main Menu > Core-CT Financials > Purchasing > Purchase Orders > Add/Update POs > Add/Update Contracts. The page title is 'Contract Entry' and the sub-title is 'Contract'. The contract details are as follows:

- Contract ID:** 16P5XD153AAA
- SetID:** STATE
- Contract Version:** Version 1, Status Current
- *Status:** Approved (dropdown menu)
- New Version:** Button
- Approved Date:** 10/05/2016
- Administrator/Buyer:** (dropdown menu)
- State Identified Contract Type:** Statewide Award (dropdown menu)

Header section:

- Contract Style: General Contract
- Process Option: General Contract
- Supplier: 541904151F-001
- Supplier ID: 0000064731
- Supplier Name: [EPLUS TECHNOLOGY INC](#)
- Begin Date: 10/05/2016
- Expire Date: 10/05/2025
- Renewal Date: (dropdown menu)
- Currency: USD, CRRNT
- Primary Contact: (dropdown menu)
- Supplier Contract Ref: ReqtoBID
- Description: DOCM1 0000069552
- Master Contract ID: (dropdown menu)
- Tax Exempt ID: (dropdown menu)
- Tax Exempt

Amount Summary table:

Maximum Amount	5,000,000.00	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	
Remaining Amount	5,000,000.00	
Remaining Percent	100.00	

Order Contract Options section:

- 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

Voucher Contract Options section:

- (dropdown menu)

- 11. The link opens the **Add / Update Contracts** component of **Purchasing** in a new window
- 12. Click the **Close** button on the browser after completing review
- 13. Click the **Select** option to add the contract to the line item
- 14. Click the **OK** button

The screenshot shows the 'Contract Search' window. At the top, there are search criteria fields for SetID, Contract ID, Contract Style, Description, Master Contract ID, Contract Reference Type, Supplier SetID, Supplier ID (EPLUS TECHNOLOGY INC), Item SetID, Item ID, Item Description, Category, and Corporate Contract. Below these are 'Search' and 'Clear' buttons. The main section is titled 'Contract Details' and contains a table with columns: Select, Contract ID, Contract Version, Contract Reference Type, Category, Item ID, Item Description, Contract Base Price, and Use Contract Base Price. Three rows are visible, with the first row selected. Below the table are 'OK', 'Cancel', and 'Refresh' buttons.

Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price	Use Contract Base Price
<input checked="" type="checkbox"/>	16PSX0153AA	1	Open Item					
<input type="checkbox"/>	12PSX0431AA	1	Open Item					
<input type="checkbox"/>	12PSX0308AB	2	Open Item					

15. Click **Save**

Maintain Purchase Order
Purchase Order

Business Unit DOTM1 PO ID NEXT PO Status Open Budget Status Not Chk'd Hold From Further Processing

Copy From

Header

*PO Date 10/12/2016 Supplier Search
*Supplier 541904151F-001 Supplier Details
*Supplier ID 0000064731 EPLUS TECHNOLOGY INC.
*Buyer MarquesA DOT-Marques, Aimee C

PO Reference Cisco Products

Doc Tot Status Valid

Receipt Status Not Recvd
*Dispatch Method Email

Amount Summary

Merchandise	10,450.00	USD	
Freight/Tax/Misc.	0.00		<input type="button" value="Calculate"/>
Total Amount	10,450.00		
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Header Details Activity Summary
PO Defaults Add Comments
PO Activities Add ShipTo Comments
Actions Procurement Group

Add Items From

Catalog Item Search
Purchasing Kit

Lines

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

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Release	Purchasing Authority	Milestone Line	Group ID
1	<input type="text"/>	ADJ COMPUTER	STATE	16PSX0153AA		1		Contracts		
2	<input type="text"/>	COMPUTER DISPLAY	STATE	16PSX0153AA		1		Contracts		

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View Approvals