

State of Oklahoma

COR211

Contracts Manual

Office of Management & Enterprise Services



OKLAHOMA

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Document History

<u>Document Revision</u>	<u>Date</u>	<u>Description</u>
1.0	03/04/2003	Initial Document
1.1	07/01/2004	ADA Compliance
1.2	05/10/2011	CORE Template used to standardize
1.3	01/04/2012	Updated Screen Shots and Processes
1.5	11/12/2024	Updated Screen Shots and Processes



Supplier Contracts Introduction

Overview

PeopleSoft Purchasing automates the business processes involved in the procurement of goods and services. PeopleSoft Purchasing features several key functions:

- Creating and Maintaining Supplier Information
- Creating and Maintaining Items for Purchasing
- Entering Requisitions
- Managing Requests for Quotes (RFQ's)
- Administering Supplier Contracts
- Creating, Generating and Dispatching Purchase Orders
- Integration with Other PeopleSoft Applications

This training manual focuses on creating Supplier contracts, specifically:

- Creating State of Oklahoma statewide contracts
- Creating State of Oklahoma Agency contracts

Supplier contracts will be used in the State of Oklahoma for purchasing specific items from approved suppliers at an agreed upon price. All contracts have specific start and end dates and maximum dollar amounts that can be purchased under the contract.

There are two (2) types of Supplier contract relationships that can be established: Fixed and Open Item.

- **Fixed Item** – The contract is only valid for purchases that specifically reference the items identified on the contract.
- **Open Item** – Agreements that apply for any item purchased from the supplier while the contract is in effect.

Two types of contracts will be used in the State of Oklahoma:

- Statewide Contracts – available to all State agencies
- Agency Contracts – available to specific State agencies only

Once a contract has been created, POs can be released against it by:

1. Building the PO from a requisition that was created against the contract.
2. Creating a PO which copies directly from the contract.

PO Releases are addressed in Course P110 – Purchase Order Administration.

NOTE: Throughout this manual page shots are included to illustrate and describe the data fields that must be entered for specific transactions. Not all pages or fields on a page will be explained. This manual focuses on those pages and fields that are required for data entry for the State of Oklahoma.



NOTE: Throughout this training manual, you will be asked to **click OK** buttons, **Refresh** buttons, or **Save** buttons while entering information. It is important to remember that **clicking** the **OK** button just accepts the information on a sub-page and returns you to the main page. It does not save the information if you exit the transaction. Only the **Save** button actually saves the information you have entered. **Clicking** the **Refresh** button updates the display to incorporate the information and defaults you have entered.



Creating a Statewide Contract

The major steps in creating a statewide contract are:

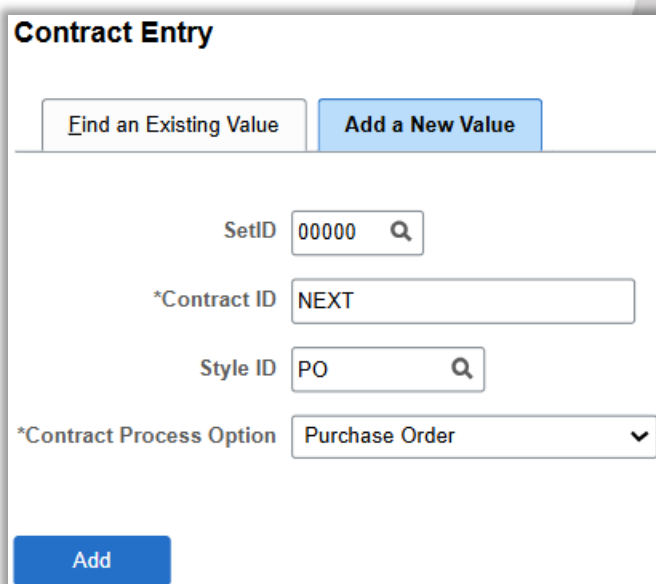
1. **Select** the Contract Type.
2. **Enter** general information.
3. **Enter** line, line pricing, and line price adjustment information.
4. **Approve** and save the contract.
5. **Dispatch** the contract.

Step 1 – Select Contract Type

To create a statewide contract, navigate as follows:

Navigation: *Procurement Contracts > Add / Update Contracts*

Click the **Add a New Value** Tab.



The screenshot shows a web form titled "Contract Entry". At the top, there are two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is selected. Below the tabs, there are four input fields:

- SetID:** A text input field containing "00000" with a search icon to its right.
- *Contract ID:** A text input field containing "NEXT".
- Style ID:** A text input field containing "PO" with a search icon to its right.
- *Contract Process Option:** A dropdown menu with "Purchase Order" selected and a downward arrow.

At the bottom left of the form, there is a blue "Add" button.

SetID – ALL contracts must be entered under SetID “00000”.

Contract ID – LEAVE AS NEXT. The system will automatically assign the next Contract number when the contract is saved.

Contract Process Option – Select Purchase Order.

Click the **Add** button.



If you have saved a new contract prior to completing all of the information (e.g., you need to verify the contract expiration date), you can go back to update the contract by using the following navigation:

Navigation: Procurement Contracts > Add / Update Contracts

Click the **Find an Existing Value** Tab.

Contract Entry
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ **Search Criteria**

*SetID = 00000

Contract ID begins with

Contract Version =

Version Status =

Contract Style begins with

Contract Process Option =

Short Supplier Name begins with

Supplier Name begins with

Master Contract ID begins with

Description begins with

Correct History Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

SetID – Make sure this is “00000.” All contracts are entered in SetID “00000.”

Contract ID – **Enter** the Contract ID. (Alternatively, you can enter the short supplier name or press the **looking glass icon**.)

Short Supplier Name – **Enter** the short supplier name or lookup **looking glass icon** the name. (Alternatively, you can enter the contract ID or press the **looking glass icon** button.)

Click the **Search** button. A list of contracts will come up. **Select** the contract you want to update.



Status – The contract status will automatically default to Open. Available statuses are:

- *Open* – Indicates the initial status of the contract - not yet approved. A contract must be in an Open status in order to make changes to it.
- *Approved* - Only contracts with an approved status can be released.
- *On Hold* - Identifies the contract as being on hold - not eligible for releases.
- *Closed* - Indicates the completion of the term of the contract - no longer eligible for releases.
- *Canceled* – Identifies the contract as being canceled.

Supplier / Supplier ID – **Select** the short supplier name or supplier ID. The lookup icon can also be used to select the supplier. Verify that the correct supplier is selected at the proper location.

Primary Contact – Use the lookup icon to select the supplier’s contact person, if one has been set up in the supplier file.

Description – **Enter** a brief description for the contract.

Master Contract ID – LEAVE BLANK.

Maximum Amt – **Enter** the maximum amount of the contract, if applicable.

supplier Contract Ref – LEAVE BLANK.

Tax Exempt – Check the box if the contract is tax exempt. **Enter** the tax exempt ID in the text box to the right of the check box. Do **NOT** check this box unless the supplier is “Tax Exempt.”

Begin Date – Defaults to the current date. This can be changed if the contract will begin at a later date.

Expire Date – **Enter** the expiration date for the contract.

Click the [Thresholds & Notifications](#) link to specify the notification parameters when a contract is nearing expiration.



Thresholds & Notifications

×
Help

Send Date/Amount Notification Send Threshold Notification

Expand All Collapse All

▼ Date Notification

Notify user when contract is within specified days of **Expire Date**.

Expire Date Notify Days Before Expires

Expiration Notification Date 08/02/2025

Notify user when contract is within specified days of **Renewal Date**.

Renewal Date Notify Days Before Renewal

Renewal Notification Date

Notify user when New Contract or Draft is within specified days of **Approval Due Date**.

Approval Due Date Notify Days Before Approval

Approval Notification Date

▼ Maximum Amount Notification

Notify user when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum USD

Percent Less than Maximum

Notification Amount

▼ Spend Threshold Notification

Notify user when the released amount exceeds the threshold.

Released Threshold Notification Amount USD

▼ Notification Assignments

☰ 🔍
1-1 of 1
View All

	Notification Type	User ID	User Description	Email Address
1	▼	🔍		+ -

▼ Amount Summary

Maximum Amount USD

Total Line Released Amount 0.00

Total Category Released Amount 0.00

Open Item Released Amount 0.00

Click the [Expand All](#) link to open all sections.

Send Date/Amount Notification Box – Select this check box to notify the identified user when a contract expires or reaches the maximum amount on the contract. Check the box.

Send Threshold Notification – Select this check box to notify the buyer when a contract reaches or exceeds the spend threshold. After you enable notifications, you can define the controls using this page. This check box is available only if PeopleSoft Supplier Contract Management has been installed.

Notify Days Before Expires – Enter the number of days prior to expiration that you want to be notified that the contract will be expiring.



Notification Type - Select the notification type for which you want to notify a user.

- *Approval Due Date*: Select to notify a user when the approval of a contract draft is due.
- *Expiration*: Select to notify a user when a contract is nearing its expiration date.
- *Max Amt*: (maximum amount): Select to notify a user when the contract is nearing the maximum amount defined for the contract.
- *Renewal*: Select to notify a user when a contract is ready for renewal.
- *Spend Threshold*: Select to notify a user when the spend threshold for a contract has reached the amount that appears in the Threshold Notification Amount field.

User ID – Enter the user to whom you want to send notifications.

Click the **OK** button to return to the Header page.

On the Header Page, enter the following:

Order Contract Options

Allow Multicurrency PO – UNCHECK the box.

Statewide Contract – Make sure you check this box for Statewide contracts.

Allow Open Item Reference – CHECK the box. When checked, it allows items not specified on this contract to be purchased against it. Whether you are defining an open or fixed item contract, this option enables you to reference this contract for any Purchase Order item ordered from this supplier within the terms and limits of this contract.

Rate Date – Use the default date.

Adjust supplier Pricing First – UNCHECK the box.

Price Can Be Changed on Order – CHECK the box.

Dispatch Method – Defaults to Print.

Open Item Amount Released - Displays the current total amount of open item quantities released for the contract.

Total Released Amount - The current total amount of all releases for the contract. This field is editable only in Update mode.



Once all of the information is entered, the Contract Header should look similar to the following page shot:

The screenshot displays the 'Contract Entry' interface. At the top, it shows 'Contract ID: NEXT', 'Status: Open', and 'Contract Version: 1'. The 'Contract Style' is set to 'Purchase Order'. The 'Supplier' is 'SMITH FARM-001' with 'Supplier ID: 000072514' and 'SMITH FARM AND GARDEN INC'. The 'Description' is 'Lawn Mowers'. Dates include 'Begin Date: 08/02/2024' and 'Expire Date: 08/02/2025'. The 'Amount Summary' shows a 'Maximum Amount' of '1,000.00 USD'. The 'Contract Open Item Reference' section has 'Allow Open Item Reference' checked. The 'Contract Items' table below shows one item with 'Line 1', 'Item', 'Line Src Flag', 'Line S Src Type', 'Description', 'UOM', 'Category', 'Include for Release', and 'Status' (Active).

Click the [Add Comments](#) link on the Contract Entry Page. You will be transferred to the Contract Comments page.

Header Comments Page

Sort Method - **Select** from the dropdown list whether you want to sort the comments by the Comment Time Stamp or the Supplier Flag.

Sort Sequence - **Select** from the dropdown list whether you want to sort comments in Ascending or Descending order.

Click the **Sort** button to sort all comments (active and inactive). The comments will be sorted based on the Sort Method and Sort Seq that you selected.

Click the **Inactivate** button to deactivate a current comment. If you deactivated a comment by mistake, **click** the **Undo** button. This button is visible only if you inactivated a comment.

Send to Supplier - This defaults to checked. If you do not want a supplier to read this comment, make sure that you uncheck this box.

Shown at Receipt – Check the box if you want the comment to be visible on receipt documents.

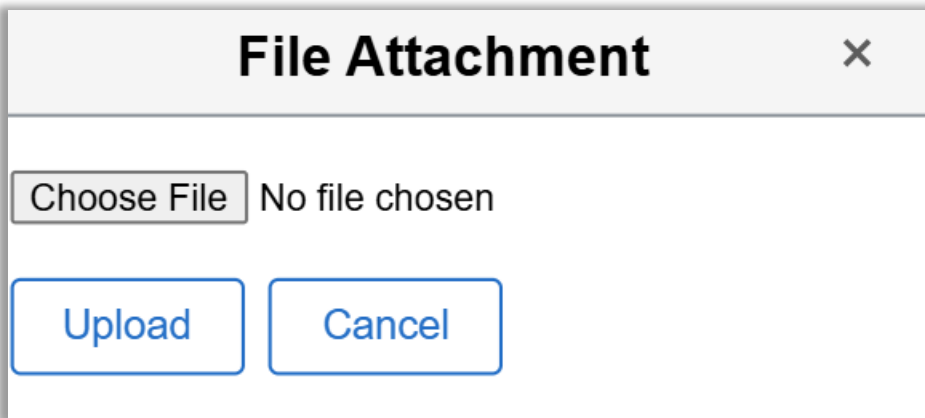
Show at Voucher - Check the box if you want the comment to be visible on vouchers.



Copy to Purchase Order - Check the box if you want the comment to be copied to Purchase Orders related to the contract.

Associated Document – Identifies a document associated with each Contract line.

Click the **Attach** button to find the associated document (e.g., Microsoft Word, Excel, or PDF file).



Click the **Choose File** button to locate the desired file.

Click the **Upload** button to attach file to contract.

Click [Use Standard Comments](#) link to choose a comment pre-defined as a Standard Comment.

Action – Select “Copy Comment” ONLY.

Comment Type – Click the **looking glass** icon to lookup the Standard Type that you want to use.

Comment ID – Click the **looking glass** icon to lookup the Comment ID that you want to use.

To add additional comments, **click** the **plus** button in the upper right corner of the comment page.

NOTE: When there are multiple comments, the system will display only the most recent comment. The scroll display indicates the number of comments available for viewing. To view the remaining comments, either **click** the **right arrow** button to go to the next comment or **click** [View All](#) to see all the comments in the scroll area. To return to viewing only one line and its associated schedules, **click** [View 1](#).

When you have finished entering your standard comments, **click** the **OK** button to return to the Header Comments page.

Click the **OK** button again to return to the Header page.

Step 3 – Enter Line Information

The screenshot displays the 'Contract Entry' interface. At the top, it shows contract metadata: SetID 00000, Contract ID NEXT, Status Open, and Contract Version 1. Below this is the 'Header' section with fields for Contract Style (Purchase Order), Supplier (SMITH FARM-001), Supplier ID (0000072514), and Description (Lawn Mowers). It also includes dates for Begin (08/02/2024), Expire (08/02/2025), and Renewal. The 'Contract Items' section is expanded to show a table with one item:

Line	Item	Line Src Flag	Line SSrc Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER: Lawn	EA	27112014	<input checked="" type="checkbox"/>	Active

Details Tab

Item ID – Enter the Item ID. The Item ID will default in the Description, UOM, and Category.

Line Src Flag – Check the box if sole source is required.

Line SSrc Type – Lookup the Sole Source Type. Select one of the following values:

- TYP1 – Sole Make/Model/Brand
- TYP2 – Sole Supplier
- TYP3 – Additional/Replacement Parts
- TYP4 – Original Supplier
- TYP5 – Brand Name for Resale
- TYP6 – Compelling Urgency Limit
- TYP7 – Litigation Expert
- TYP8 – Statute Authorization

Description – Enter the Item Description. If an existing Item ID is used, the Description will default from the Item ID.



UOM – **Enter** the Unit of Measure. If an existing Item ID is used, the UOM will default from the item supplier UOM and cannot be changed.

Category – **Enter** the Item Category. If an existing Item ID is used, the Category will default from the item.

NOTE: When buying from OCI (Oklahoma Correctional Industries), use category codes starting with “8”.

Include for Release – Defaults to checked.

Order By Amount Tab

Amt Only – **Check** the box if the contract is to be received by amount. This box must be checked if you intend to use Milestone tracking. When amount is selected:

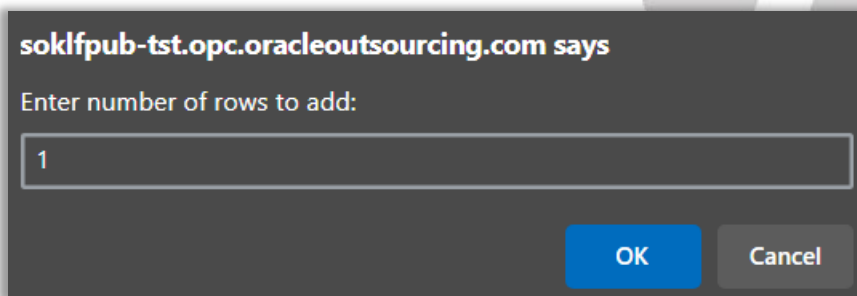
- The quantity field is set to “1” and is unavailable for editing.
- The Merch Amt on the contract line becomes a required field.

Merch Amt – **Enter** the amount of the item, if it does not default in from the item ID.

Item Information Tab

This tab is used to select the physical nature, Goods or Services. Also, you can enter the Supplier’s Item ID, Catalog, Manufacturer ID and Manufacturer Item ID, if needed.

To add additional lines to the Contract, scroll to the right and **click** the **plus** button. The following popup appears:



soklfpub-tst.opc.oracleoutsourcing.com says

Enter number of rows to add:

1

OK Cancel

Enter the number of lines you want to insert. **Complete** the line information for the added rows.

NOTE: The contract status must be “Open” to add additional information.

Lines

1-1 of 1 | View All

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold | IP

Line	Item	Line S/c Flag	Line S/c Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER: Lawn	EA	27112014	<input checked="" type="checkbox"/>	Active

View Category Hierarchy | Category Search

Click the **Line Details** icon and then Click the **Pricing Information** field to expand.

Details for Line 1

Version 1 | Supplier SMITH FARM-001 | Item ID 1000012487 | MOWER: Lawn

Line 1 | Category 27112014 | Description MOWER: Lawn | Category ID 55242 | Status Active | Physical Nature Goods

Transaction Item Description: MOWER: Lawn

243 characters remaining

Preferred Language Item Description: MOWER: Lawn

Expand All | Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

Use Contract Base Price | Use Supp Price UOM Adjustments

Price Can Be Changed on Order | Use Supplier Price Shipto Adj

Price Date: PO Date | Adjust: Before Contract Adjustments

Price Qty: Line Quantity | Order By Amount: Amount Only

Qty Type: Current Order Quantity | 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

	Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr
<input checked="" type="checkbox"/>	0001	EA			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

Lead Time	Time Due	*Qty Sched	UOM
0		1.0000	EA

Custom Fields

OK | Cancel | Refresh

Pricing Information

Pricing Information

Use Contract Base Price
 Price Can Be Changed on Order

Price Date: PO Date

Price Qty: Line Quantity

Qty Type: Current Order Quantity

Use Supp Price UOM Adjustments
 Use Supplier Price Shipto Adj

Adjust: Before Contract Adjustments

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

1-1 of 1 | View All

	Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr		
<input checked="" type="checkbox"/>	0001	EA			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

1-1 of 1 | View All

Lead Time	Time Due	*Qty Sched	UOM		
0		1.0000	EA	+..	-

Price Can Be Changed on Order – Check the box.

Use Contract Base Price – Check the box. Select to use the base price on the contract rather than the price on the Supplier's UOM & Pricing Info page as the base price when calculating the purchase order price for the item. The Base Price field becomes available for entry when you select this option. For ad hoc items, this option is automatically selected and unavailable for entry, because a base price value is required for ad hoc items.

DO NOT CHANGE the other Pricing Information defaults.

Schedule Defaults / UOM/Pricing

Default – Check the box.

Pricing Location – Select the supplier location if it does not default or click the **lookup** icon (magnifying glass) to search for the location.

UOM – Defaults from the Item.

Curr – Defaults to USD.

Base Price – **Enter** the base price for the item or change the base price if it defaults in from the item.

Allow all other defaults on the page to remain as is.

Click the **OK** button to return to the Contract Entry page. Repeat the PO Line Pricing for each line of the contract.

If you want to add a price adjustment (e.g., the contract allows a standard 10% discount on the item on Line 1), **click** the **Price Adjustment** icon. You will be transferred to the PO Line Pricing Adjustments page.

Line	Item	Line Src Flag	Line S Src Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER Lawn	EA	27112014	<input checked="" type="checkbox"/>	Active



PO Price Adjustments Page

This page allows you to enter price adjustments that apply only to the specific line item. The PO Line Price Adjustments page applies to order releases only.

Contract Price Adjustments x

Contract Entry Help

Price Adjustments for Item Line 1

SetID 00000 Contract ID NEXT Version 1 Line: 1 MOWER: Lawn

Price Adjustments 1 of 1 View All

*Effective Date: 08/02/2024 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule 1 of 1 View All

Criteria
 Sequence:
 Supp Loc:

Method
 General Adjustment
 Match Shipto
 Ship To:
 Match UOM
 UOM:

Restrictions
 Hard Price
 Ignore If Other Adjustments
 Stop Price Calculation Here

Adjustment Detail 1-1 of 1 View All

*Method	Percentage	Adjusted Price
Percentage	<input type="text"/>	

OK Cancel Refresh

Calculation Method – Enter the method used to calculate the adjustments. The default is “Sum All Adjustments.” DO NOT CHANGE.

- **Sum All Adjustments:** Adjustments are summed and made against the original base price. For example, if you have a base price of 100 and two percentage adjustments of -10% each, the system will take the total adjustment of -20 and deduct it from the base price of 100 for a final adjusted price of 80.
- **Increment Adjustments:** Each valid adjustment is made against the current (base or adjusted) price. For example, if you have a base price of 100 and two percentage adjustments (price rules) of -10% each, then the first adjustment is deducted from the base price of 100, for a current adjusted price of 90. The second adjustment of -10% is deducted from 90 for a final adjustment price of 81.

Seq – System generated number for the price adjustment.



Supp Loc – Supplier price location for this contract.

Match UOM - Select if this adjustment is to be based on the UOM. If you select this option you can add rows to the Details grid and use either Pct (percentage) or Amt (amount) as the **Adjustment Method** in the **Details** grid.

UOM – This field is only available if you **select** Match UOM.

Match Ship to - Select if this adjustment is to be based on the ship to ID. For example, if the supplier gives you an additional 5% discount if you purchase items within Oklahoma, you could define a price adjustment for each ship to location within your state. When you select this option without also selecting **UOM Match**, no rows can be added in the **Details** grid and the **Adjustment Method** defaults to Pct (percentage) and cannot be overridden.

Ship To - This field becomes available for entry if you **select** the Match Ship option.

General Adjustment - Select if this is a general adjustment that does not fall into the classification of a UOM or ship to adjustment. When you select general adjustment, the **UOM Match** and **Match Ship** options become unavailable for entry. The **Adjustment Method** defaults to Pct (percentage) and cannot be overridden. If you select this option, no rows can be added to the **Details** grid.

Hard Price - Select if you want the system to apply the price resulting from an adjustment regardless of any other adjustments it finds.

Stop Price Calculation Here - Select to have the adjustment that you defined set a final price. If the check box is selected, the system does not calculate any further adjustments.

Ignore If Other Adjustments - Select this adjustment restriction to create a price adjustment scenario in which the system ignores this price adjustment if the contract qualifies for another adjustment. If another adjustment does not apply, this adjustment will apply even if the Ignore If Other Adjustments check box is selected.

Adjustment Method – **Select** whether to adjust the price by amount or percentage. Amounts and percents can be either positive or negative. A negative adjustment (discount) means the price or schedule value will be reduced by the adjustment. A positive adjustment (surcharge) means the price or schedule value will be increased by the adjustment.

- *Amt (amount)*: If you choose to adjust by amount, the Adjustment Amount field displays. This value applies only if the UOM Match option is selected.
- *Pct (percent)*: If you choose to adjust by a percentage, the Adjustment Percentage field displays.

Min Qty – The minimum quantity to which the price adjustment can be applied.

Max Qty – The maximum quantity to which the price adjustment can be applied.



Adjusted Price - Price after the adjustment is applied. This is calculated from the base price and only applies to line item adjustments. For ship to and general adjustments, the adjusted price is calculated based on the default base price.

Click the **OK** button to return to the contract header page.

Line	Item	Line Src Flag	Line S Src Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER Lawn	EA	27112014	<input checked="" type="checkbox"/>	Active

Click the **Comment** icon. You will be transferred to the Line Comments page.

Line Comments Page

Contract Comments

Contract Entry

Comments for Line 1

SetID 00000 Contract ID NEXT Version 1 Line 1

*Sort Method *Sort Sequence

Comments | 1 of 1 | View All

Use Standard Comments

Use Item Specifications

Send to Supplier Show at Receipt Copy to Purchase Order
 Show at Voucher

Associated Document

Email

From -> CNT 00000-NEXT

This page is similar to the header comments page. Enter any comments that you want to apply to a specific line on the contract. Select the documents that you want the Line comments to be visible on (e.g., Send to supplier, Shown at Receipt, Shown at Voucher and/or Copy to PO).

Click the [Standard Comments](#) link to add pre-defined comments to the contract. If there are associated files that you want to attach, click the **Attach** button to find the associated document (e.g., Microsoft Word, Excel, or PDF file). Enter file path or click the **Choose File** button to locate desired file.

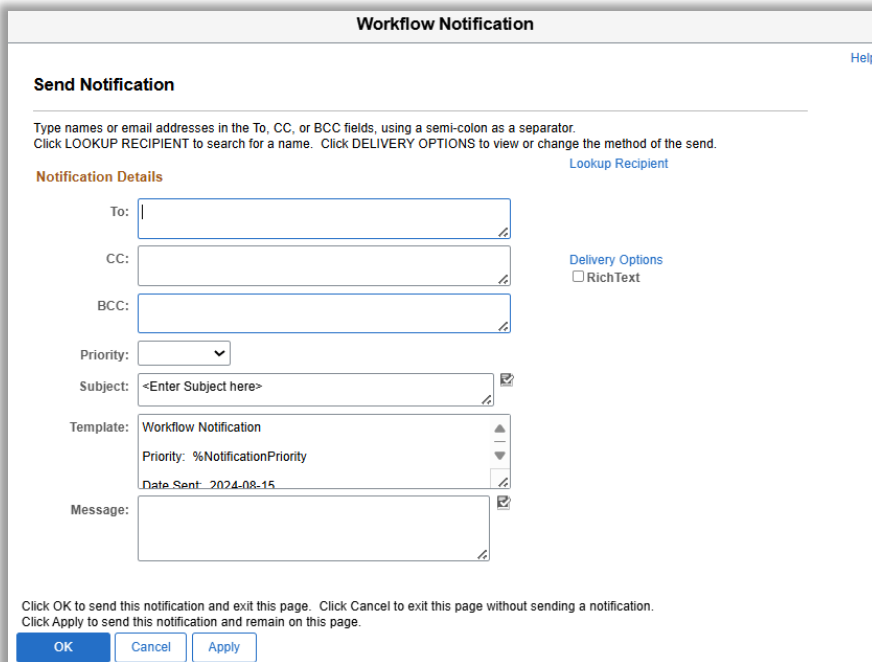
Click the **Upload** button to attach a file to the contract.

Click the **OK** button to return to the Header page.

Click the **Save** button Note the Contract Number.

Notify Button

At the bottom of most pages, you will see a **Notify** button. It transfers you to the following page where you can send an e-mail or worklist notification to individuals regarding information or questions about the page you are on. The notification will provide a link to the PeopleSoft page you are on.



TO: / CC: / BCC: – **Enter** the e-mail addresses of the individuals.

Priority – **Select** the priority level: Low, Medium or High.

Template – **DO NOT CHANGE.**

Message – Type in your message.

Click the [Delivery Options](#) link and select whether you want this message to go to the recipient's Worklist or E-mail.

Click the **OK** button to return to the Header page.



Copy Contract ID Option

The screenshot shows the 'Contract Entry' page. The 'Contract' section includes the following fields: SetID (00000), Contract ID (NEXT), *Status (Open), and Administrator/Buyer. The 'Contract Version' section includes Version (1) and Approval Due Date. The 'Status' is Current. A red box highlights the 'Copy From Contract' link next to the SetID field. An 'Add a Document' button is visible in the bottom right corner.

From the **Contract Entry** page, click the [Copy From Contract](#) link – This is an option that allows you to copy the information from another Contract into a new contract.

The screenshot shows the 'Copy Contract ID' dialog box. It has a title bar 'Copy Contract ID' and a 'Help' link. The 'Contract Entry' section shows SetID (00000) and Contract ID (NEXT). The 'Contract Search' section includes fields for Contract ID, Supplier, and Supplier ID, each with a search icon. A 'Search' button is below these fields. The 'Master Contract ID' field also has a search icon. There is a checkbox for 'Allow Open Item Reference'. The 'Select Contract' section features a table with columns: Sel, Contract ID, Version, Description, Supplier ID, Short Supplier Name, and Supplier Contract Ref. The table currently has one row with a checked 'Sel' box. Below the table are 'OK', 'Cancel', and 'Refresh' buttons.

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

If you want to copy an existing Contract, enter the Contract ID and **click the Search** button.

Select the contract you want to use by **clicking** the Sel box to the left of the Contract ID

Click the OK button to return to the Contract Header.



Step 5 – Dispatch the Contract

To print a hard copy of the contract, run the Contract Dispatch process.

Navigation: Procurement Contracts > Dispatch Contracts

Dispatch Supplier Contracts


Enter any information you have and click Search. Leave fields blank for a list of all values.

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

▼ **Search Criteria**

Run Control ID

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Enter an existing Run Control ID and **click** the **Search** button or **select** the **Add a New Value** Tab and **click** the **Add** button. If you are adding a new Run Control enter the Run Control ID.

Process Scheduler Request Page

Server Name – Leave server name blank to default or select the PSNT server option.

Check the Vendor Contract Dispatch/Print process. The user can change the **Type** or **Format** options. For example, the **Type** option can be changed to **Email** if the user wants it sent there.

Click the OK button to return to the Dispatch Supplier Contracts page and **click the Process Monitor** link in upper right corner of page. You will be transferred to the Process List Page where you can review the progress of the process.

Process List Tab

When the Run Status = “Success” and Distribution Status = “Posted”, **click the Details** link. You will be transferred to the Process Detail Page.

Process Detail Page

Process Detail x

[Help](#)

Process

Instance	29239909	Type	SQR Report
Name	POCNT100	Description	Vendor Contract Dispatch/Print
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	CONTRACTDISP	Update Process	
Location	Server	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input type="radio"/> Delete Request <input type="radio"/> Re-send Content	
Server	PSNT	<input type="radio"/> Restart Request	
Recurrence			

Date/Time

Request Created On	08/05/2024 10:01:25AM CDT	Parameters	Transfer
Run Anytime After	08/05/2024 9:59:40AM CDT	Message Log	
Began Process At	08/05/2024 10:01:34AM CDT	Batch Timings	
Ended Process At	08/05/2024 10:01:46AM CDT	View Log/Trace	

Click the [View Log/Trace](#) link.

View Log/Trace x

[Help](#)

Report

Report ID	25963243	Process Instance	29239909	Message Log
Name	POCNT100	Process Type	SQR Report	
Run Status	Success	Vendor Contract Dispatch/Print		

Distribution Details

Distribution Node	OOD_REPNODE	Expiration Date	<input type="text" value="08/19/2024"/>
-------------------	-------------	-----------------	---


File List

Name	File Size (bytes)	Datetime Created
POCNT100_29239909.PDF	11,677	08/05/2024 10:01:46.217379AM CDT
POCNT100_29239909.out	241	08/05/2024 10:01:46.217379AM CDT
SQR_POCNT100_29239909.log	1,926	08/05/2024 10:01:46.217379AM CDT

Distribute To

Distribution ID Type	-Distribution ID
User	BBENN06

Click the [.PDF](#) link to view the contract and print it.



CONTRACT

State of Oklahoma

Dispatch via Print

Supplier 0000072514
 SMITH FARM AND GARDEN INC
 3733 NW 10TH ST
 OKLAHOMA CITY OK 73107-6032
 USA

Contract ID 000000000000000000000000007415		Page 1 of 1	
Contract Dates 08/02/2024 to 08/02/2025	Currency USD	Rate Type CRRNT	Rate Date PO Date
Description: Lawn Mowers		Contract Maximum 1,000.00	
TYPE: STATEWIDE			

Tax Exempt? Y Tax Exempt ID:736017987

Contract Lines:

Line #	Cat CD / Item ID / Item Desc	UOM	Minimum Order Qty	Amt	Maximum / Open Qty	Amt
1	27112014 / 1000012487 MOWER: Lawn	EA	1.00	0.00	0.00	0.00
Contract Base Pricing				0.00000		0001

COMMENTS:

Printable version is displayed.

Creating an Agency Contract

The major steps in creating an agency supplier contract are:

1. **Select** the Contract Type.
2. **Enter** general information.
3. **Create** PO Defaults (Agency contract only).
4. **Enter** line, line pricing, and line price adjustment information.
5. **Approve** and save contract.
6. **Dispatch** the contract.

Step 1 – Select Contract Type

To create an Agency contract, navigate as follows:

Navigation: Procurement Contracts > Add / Update Contracts

SetID – ALL contracts must be entered under SetID “00000”.

Contract ID – LEAVE AS NEXT. The system will assign the next Contract number automatically when the contract is saved.

Contract Process Option – Select Purchase Order.

Click the **Add** button.



If you have saved a new contract prior to completing all of the information (e.g., you need to verify the contract expiration date), you can go back to update the contract by using the following navigation:

Navigation: Procurement Contracts > Add Update Contracts

SetID – Make sure this is “00000.” All contracts are entered in SetID “00000.”

Contract ID – **Enter** the Contract ID. (Alternatively, you can enter the short supplier name or **click** the **Search** button.)

Short Supplier Name – **Enter** the short supplier name or lookup the name. (Alternatively, you can enter the contract ID or **click** the **Search** button.)

Click the **Search** button. A list of contracts will come up. **Select** the contract you want to update.



Step 2 – Enter General Information

When you are creating a new contract, enter the supplier information and contract terms on the Contract Header page.

Contract Tab

Contract Entry

Contract

SetID 00000 Copy From Contract Contract Version

Contract ID NEXT Version 1 Status Current

*Status Open Approval Due Date

Administrator/Buyer Add a Document

Header

*Contract Style Purchase Order

Process Option Purchase Order

*Supplier SMITH FARM-001 Supplier Search

*Supplier ID 000072514 SMITH FARM AND GARDEN INC

Primary Contact

Supplier Contract Ref

Description Lawn Mowers

Master Contract ID

*Begin Date 08/05/2024

Expire Date 08/05/2025

Renewal Date

Control Type

Tax Exempt Auto Default Lock Chartfields

Tax Exempt ID

Add Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases
Custom Fields

Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults

Statewide Contract

Currency USD

Rate Date 08/05/2024 CRRNT

Must Use Contract Rate Date
 Allow Multicurrency PO

Amount Summary

Maximum Amount 1000.00 USD

Line Item Released Amount 0.00

Category Released Amount 0.00

Open Item Released Amount 0.00

Total Released Amount 0.00

Contract Open Item Reference

Allow Open Item Reference Price Can Be Changed on Order

Adjust Supplier Pricing First [Add Open Item Price Adjustments](#)

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold

Line	Item	Line Src Flag	Line S Src Type	Description	UOM	Category	Include for Release	Status
1							<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

Contract Categories

Lines

Details Pricing Options Release Amounts Spend Threshold

Line	Category	Description	Status
1			Active

Save Notify Refresh Add Update/Display Correct History

Status – The contract status will automatically default to Open. Available statuses are:

- Open – Indicates the initial status of the contract - not yet approved. A contract must be in an Open status in order to make changes to it.
- Approved - Only contracts with an approved status can be released.
- On Hold - Identifies the contract as being on hold - not eligible for releases.
- Closed - Indicates the completion of the term of the contract - no longer eligible for releases.
- Canceled – Identifies the contract as being canceled.

Supplier/Supplier ID – **Select** the short supplier name or supplier ID. The **looking glass** icon can also be used to select the supplier. Verify that the correct supplier is selected at the proper location.

Begin Date – Defaults to the current date. This can be changed if the contract will begin at a later date.

Expire Date – Enter the expiration date for the contract.

Primary Contact – Use the **looking glass** icon to select the supplier’s contact person, if one has been set up in the supplier file.

Supplier Contract Ref – LEAVE BLANK.

Description – **Enter** a brief description for the contract.

Master Contract ID – LEAVE BLANK.

Maximum. Amount – **Enter** the maximum amount of the contract if applicable.

Tax Exempt – Check Tax Exempt box if the contract is tax exempt. **Enter** the tax exempt ID in the text box to the right of the check box. Do NOT check this box unless the supplier is “Tax Exempt.”

Click the [Thresholds & Notifications](#) link to specify the notification parameters when a contract is nearing expiration.



Thresholds & Notifications

[Help](#)

Send Date/Amount Notification

Send Threshold Notification

[Expand All](#)

[Collapse All](#)

▼ Date Notification
 Notify user when contract is within specified days of Expire Date.

Expire Date

Expiration Notification Date

Notify Days Before Expires

Notify user when contract is within specified days of Renewal Date.

Renewal Date

Renewal Notification Date

Notify Days Before Renewal

Notify user when New Contract or Draft is within specified days of Approval Due Date.

Approval Due Date

Approval Notification Date

Notify Days Before Approval

▼ Maximum Amount Notification
 Notify user when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum USD

Percent Less than Maximum

Notification Amount

▼ Spend Threshold Notification
 Notify user when the released amount exceeds the threshold.

Released Threshold Notification Amount USD

▼ Notification Assignments

1-1 of 1

[View All](#)

	Notification Type	User ID	User Description	Email Address
1	<input type="text"/>	<input type="text"/>		

▼ Amount Summary

Maximum Amount USD

Total Line Released Amount

Total Category Released Amount

Open Item Released Amount

Click the [Expand All](#) link to open all sections.

Send Date/Amount Notification Box – Select this check box to notify the identified user when a contract expires or reaches the maximum amount on the contract. Check the box.

Send Threshold Notification – Select this check box to notify the buyer when a contract reaches or exceeds the spend threshold. After you enable notifications, you can define the controls using this page. This check box is available only if PeopleSoft Supplier Contract Management has been installed.

Notify Days Before Expires – **Enter** the number of days prior to expiration that you want to be notified that the contract will be expiring.



Notification Type - Select the notification type for which you want to notify a user.

- *Approval Due Date*: Select to notify a user when the approval of a contract draft is due.
- *Expiration*: Select to notify a user when a contract is nearing its expiration date.
- *Max Amt*: (maximum amount): Select to notify a user when the contract is nearing the maximum amount defined for the contract.
- *Renewal*: Select to notify a user when a contract is ready for renewal.
- *Spend Threshold*: Select to notify a user when the Spend Threshold for a contract has reached the amount that appears in the Threshold Notification Amount field.

User ID – Enter the user to whom you want to send notifications.

Click the **OK** button to return to the Header page.

Order Contract Options

Allow Multicurrency PO – UNCHECK the box.

Statewide Contract – For Agency contracts, make sure you UNCHECK this box.

Allow Open Item Reference – CHECK the box. When checked, it allows items not specified on this contract to be purchased against it. Whether you are defining an open or fixed item contract, this option enables you to reference this contract for any Purchase Order item ordered from this supplier within the terms and limits of this contract.

Rate Date – Use the default.

Adjust Supplier Pricing First – UNCHECK the box.

Price Can Be Changed on Order – CHECK the box.

Dispatch Method – Defaults to Print.

Open Item Amount Released - Displays the current total amount of open item quantities released for the contract. This should always be “0” for State of Oklahoma since open item contracts are not permitted.

Total Released Amount - The current total amount of all releases for the contract. This field appears only in Update mode.



Once all of the information is entered, the Contract Header page should look similar to the following print screen.

The screenshot displays the 'Contract Entry' interface. At the top, it shows 'Contract' details: SetID 00000, Contract ID NEXT, Status Open, Version 1, and Status Current. The 'Header' section includes fields for Contract Style (Purchase Order), Process Option (Purchase Order), Supplier (SMITH FARM-001), Supplier ID (000072514), and Supplier Name (SMITH FARM AND GARDEN INC). It also shows dates for Begin (08/05/2024), Expire (08/05/2025), and Renewal, along with a description of 'Lawn Mowers'. The 'Contract Control' section has a 'Business Unit' field with a dropdown menu. Below this is an 'Amount Summary' table showing released amounts. The 'Contract Open Item Reference' section has checkboxes for 'Allow Open Item Reference' and 'Price Can Be Changed on Order'. The 'Contract Items' section at the bottom shows a table with columns for Line, Item, Line S/Flag, Line S/Sec Type, Description, UOM, Category, and Status. A single line item is visible with an 'Active' status.

Since the **Statewide Contract** box is unchecked, a Business Unit must be entered into the Contract Control section.

Enter the Agency BU into the **Business Unit** field.

Click the [Add Comments](#) link. You will be transferred to the Header Comments page.

Header Comments Page

Sort Method - Select from the dropdown list whether you want to sort the comments by the Comment Time Stamp or the Supplier Flag.

Sort Sequence - Select from the dropdown list whether you want to sort comments in Ascending or Descending order.

Click the **Sort** button to sort all comments (active and inactive). The comments will be sorted based on the Sort Method and Sort Seq that you selected.

Click the **Inactivate** button to deactivate a current comment. If you deactivated a comment by mistake, click the **Undo** button. This button is visible only if you inactivated a comment.

Send to Supplier - This defaults to checked. If you do not want a supplier to read this comment, make sure that you uncheck this box.

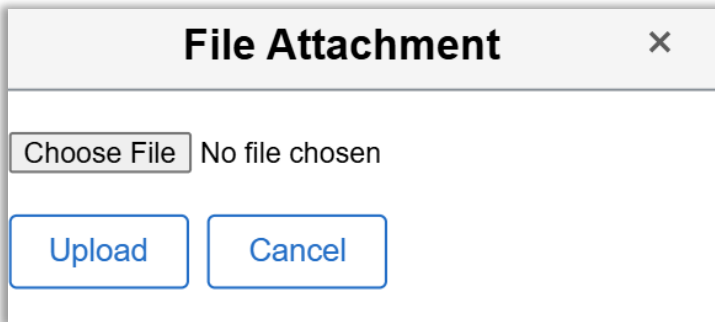
Shown at Receipt – Check the box if you want the comment to be visible on receipt documents.

Show at Voucher - Check the box if you want the comment to be visible on vouchers.

Copy to Purchase Order - Check the box if you want the comment to be copied to Purchase Orders related to the contract.

Associated Document – Identifies a document associated with each Contract line.

Click the **Attach** button to find the associated document (e.g., Microsoft Word, Excel, or PDF file).

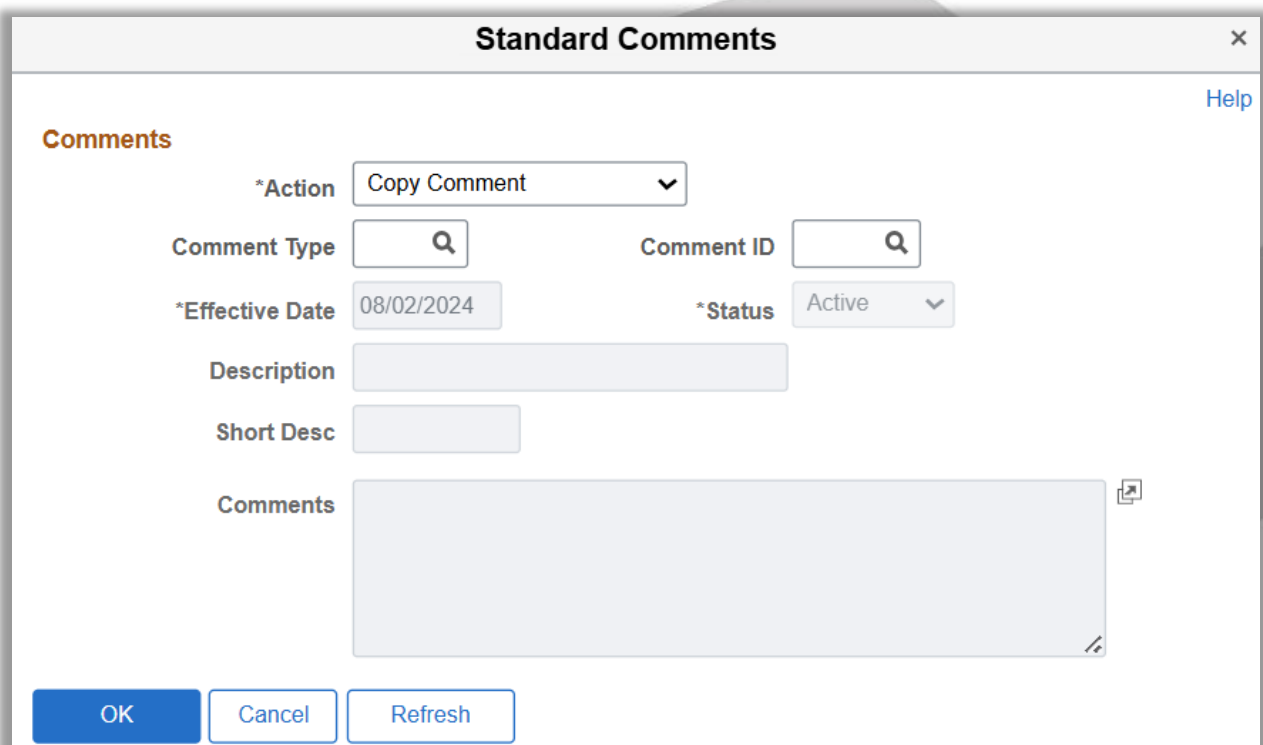


The image shows a 'File Attachment' dialog box with a close button (X) in the top right corner. Below the title bar, there is a 'Choose File' button followed by the text 'No file chosen'. At the bottom of the dialog, there are two buttons: 'Upload' and 'Cancel'.

Click the **Choose File** button to locate the desired file.

Click the **Upload** button to attach the file to the contract.

Click [Use Standard Comments](#) link to choose a comment pre-defined as a Standard Comment.



The image shows a 'Standard Comments' dialog box with a close button (X) in the top right corner. Below the title bar, there is a 'Help' link. The main area is titled 'Comments' and contains several fields:

- *Action: A dropdown menu with 'Copy Comment' selected.
- Comment Type: A text input field with a search icon (Q).
- Comment ID: A text input field with a search icon (Q).
- *Effective Date: A date input field with '08/02/2024' entered.
- *Status: A dropdown menu with 'Active' selected.
- Description: A text input field.
- Short Desc: A text input field.
- Comments: A large text area for entering the comment content, with a copy icon in the top right corner.

 At the bottom of the dialog, there are three buttons: 'OK', 'Cancel', and 'Refresh'.

Action – Select “Copy Comment” ONLY.

Comment Type – Click the **looking glass** icon to lookup the Standard Type that you want to use.

Comment ID – Click the **looking glass** icon to lookup the Comment ID that you want to use.

To add additional comments, **click** the **plus** button in the upper right corner of the comment page.

NOTE: When there are multiple comments, the system will display only the most recent comment. The scroll display indicates the number of comments available for viewing. To view the remaining comments, either **click** the **right arrow** button to go to the next comment or **click** [View All](#) to see all the comments in the scroll area. To return to viewing only one line and its associated schedules, **click** [View 1](#).

When you have finished entering your standard comments, **click** the **OK** button to return to the Header Comments page.

Click the **OK** button again to return to the Header page.



Step 3 – Enter PO Defaults

Click the [Purchase Order BU Defaults](#) link on the Header page.

Use the PO Defaults page to set up default information for the contract for each business unit to which the contract will apply. The information that you set up on this page defaults to each release schedule you define for the specified contract/business unit combination. This page applies to order contract releases only.

PO Defaults Page

Contract Defaults by BU

Contract Entry

PO Defaults

SetID 00000 Contract ID NEXT Version 1 Supplier ID 0000072514

Header

*Business Unit Copy from BU Defaults + -

Supp Loc 0001

Buyer

Origin AGY Billing Location

Currency Tax Exempt

Payment Terms ID Tax Exempt ID:

Shipping Information

Ship To Ship To Address

Location

IN Unit

Freight Terms

Ship Via

Charge By Quantity

AM Business Unit

Capitalize

Profile ID

Cost Type

Ultimate Use Code

Where Performed

Distributions

*GL Unit	Account	Alt Acct	Oper Unit	Fund Type	Dept	Program	Class-Funding	Bud Ref	Sub-Accou
<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

Add Comments

Business Unit – Enter the business unit to which the default values will apply. Use the **plus** button to insert additional rows if the contract will apply to more than one business unit.

Supplier Loc – Enter supplier location or click the **looking glass** icon.

Buyer – Enter the Buyer or click the looking glass icon.

Origin – Enter the origin or click the looking glass icon.

Currency – Enter currency.

Payment Terms – Enter pay terms or click the looking glass icon.

Billing Location – Enter billing location or click the looking glass icon.

Ship To – Enter the ship to location or click the looking glass icon.

Location – Enter the location or click the looking glass icon.

IN Unit – Enter inventory unit or click the looking glass icon.

Freight Terms – Enter the freight terms or click the looking glass icon.

Ship Via – Enter shipping arrangement or click the looking glass icon.

Charge By – Defaults to quantity.

AM Business Unit – Enter the asset management business unit or click the looking glass icon.

Profile ID – Enter the asset profile or click the looking glass icon.

Cost Type – Enter the cost type or click the looking glass icon.

Ultimate Use Code – Enter the ultimate use code or click the looking glass icon.

Where Performed – Click the drop-down menu and select the appropriate one

Chartfield Distribution

For each Business Unit to which the agency contract applies, enter the default chartfields that you want to populate on the POs created from the contract. It is advisable to fill in only those chartfields that you do not expect to change from PO to PO. Leave the other chartfields blank and fill them in when the PO is created.

Click the OK button to return to the Header page.

Step 4 – Enter Line Information

Contract Entry

Contract

SetID 00000 Copy From Contract Contract Version Version 1 Status Current

Contract ID NEXT *Status Open Approval Due Date

Administrator/Buyer Add a Document

Header

*Contract Style Purchase Order

Process Option Purchase Order

*Supplier SMITH FARM-001 Supplier Search

*Supplier ID 000072514 SMITH FARM AND GARDEN INC

Primary Contact

Supplier Contract Ref

Description Lawn Mowers

Master Contract ID

*Begin Date 08/05/2024

Expire Date 08/05/2025

Renewal Date

Control Type Business Unit

Tax Exempt Tax Exempt ID

Statewide Contract

Currency USD

Rate Date 08/05/2024 CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

Contract Control

Business Unit

*Business Unit	Description
1	

Amount Summary

Maximum Amount	1,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	

Contract Open Item Reference

Allow Open Item Reference Price Can Be Changed on Order

Adjust Supplier Pricing First Add Open Item Price Adjustments

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Line	Item	Line Src Flag	Line SSrc Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER Lawn	EA	27112014	<input checked="" type="checkbox"/>	Active

Contract Categories

Save Notify Refresh Add Update/Display Correct History

Details Tab

Item ID – Enter the Item ID. The Item ID will default in the Description, UOM, and Category.

Line Src Flag – Check the box if sole source is required.

Line SSrc Type – Click the **looking glass** icon to lookup the Sole Source Type. Select one of the following values:

- TYP1 – Sole Make/Model/Brand
- TYP2 – Sole Supplier
- TYP3 – Additional/Replacement Parts
- TYP4 – Original Supplier
- TYP5 – Brand Name for Resale
- TYP6 – Compelling Urgency Limit
- TYP7 – Litigation Expert
- TYP8 – Statute Authorization

Description – Enter the Item Description. If an existing item ID is used, the Description will default from the Item ID.

UOM – Enter the Unit of Measure. If an existing item ID is used, the UOM will default from the item Supplier UOM and cannot be changed.

Category – Enter the Item Category. If an existing item ID is used, the Category will default from the item.

NOTE: When buying from OCI (Oklahoma Correctional Industries), use category codes starting with “8”.

Include for Release – Defaults to checked.

Order By Amount Tab

Amt Only – Check the box if the contract is to be received by amount. This box must be checked if you intend to use Milestone tracking. When amount is selected:

- The quantity field is set to “1” and is unavailable for editing.
- The Merch Amt on the contract line becomes a required field.

Merch Amt – Enter the amount of the item, if it does not default in from the item ID.

Item Information Tab

This tab is used to select the physical nature, Goods or Services. Also, you can enter the Supplier’s Item ID, Catalog, Manufacturer ID and Manufacturer Item ID, if needed.



To add additional lines to the Contract, scroll to the right and **click** the **plus** button. The following popup window appears:

soklpub-tst.opc.oracleoutsourcing.com says

Enter number of rows to add:

1

OK Cancel

Enter the number of lines you want to insert. **Complete** the line information for the added rows.

NOTE: The contract status must be “Open” to add additional information.

Line	Item	Line Src Flag	Line S Src Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER: Lawn	EA	27112014		Active

Click the **Line Details** icon and then **Expand** the Pricing Information field.



Line Details Page

Details for Line 1

Line 1
Item ID 1000012487
MOWER: Lawn

Line Details

Category 27112014
 Description
 Category ID 55242

Status ✖ Active
 Physical Nature Goods

Transaction Item Description:
 MOWER: Lawn

243 characters remaining

Preferred Language Item Description:
 MOWER: Lawn

Expand All Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

Use Contract Base Price
 Price Can Be Changed on Order

Price Date PO Date
 Price Qty Line Quantity
 Qty Type Current Order Quantity

Use Supp Price UOM Adjustments
 Use Supplier Price Shipto Adj

Adjust Before Contract Adjustments

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

Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr		
0001	EA			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

Lead Time	Time Due	*Qty Sched	UOM		
0		1.0000	EA	+	-

Custom Fields

OK Cancel Refresh

Click the **Pricing Information** section header to expand the section.

Pricing Information

▼ Pricing Information

Use Contract Base Price
 Price Can Be Changed on Order

Price Date: PO Date ▼
Price Qty: Line Quantity ▼
Qty Type: Current Order Quantity ▼

Use Supp Price UOM Adjustments
 Use Supplier Price Shipto Adj
Adjust: Before Contract Adjustments ▼

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

	Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr		
<input checked="" type="checkbox"/>	0001	EA			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

Lead Time	Time Due	*Qty Sched	UOM		
0		1.0000	EA	+	-

Price Can Be Changed on Order – CHECK the box.

Use Contract Base Price – Check the box. Select to use the base price on the contract rather than the price on the Supplier's UOM & Pricing Info page as the base price when calculating the purchase order price for the item. The Base Price field becomes available for entry when you select this option. For ad hoc items, this option is automatically selected and unavailable for entry, because a base price value is required for ad hoc items.

DO NOT CHANGE the other Pricing Information defaults.

Schedule Defaults / UOM/Pricing

Default – Check the box.

Price Loc– Select the Supplier location if it does not default or lookup the location.

UOM – Defaults from the Item.

Curr – Defaults to USD.

Base Price – Enter the base price for the item or change the base price if it defaults in from the item.



Allow all other defaults on the page to remain as is.

Click the **OK** button to return to the Line page. Repeat the PO Line Pricing for each line of the contract.

Line	Item	Line Src Flag	Line S Src Type	Description	UOM	Category	Include for Release	Status
1	1000012487			MOWER: Lawn	EA	27112014	<input checked="" type="checkbox"/>	Active

If you want to add a price adjustment (e.g., the contract allows a standard 10% discount on the item on Line 1), click the **Price Adjustment** icon. You will be transferred to the PO Line Pricing Adjustments page.



PO Price Adjustments Page

This page allows you to enter price adjustments that apply only to the specific line item. The PO Line Price Adjustments page applies to order releases only.

Calculation Method – Enter the method used to calculate the adjustments. The default is “Sum All Adjustments.” DO NOT CHANGE.

- **Sum All Adjustments:** Adjustments are summed and made against the original base price. For example, if you have a base price of 100 and two percentage adjustments of -10% each, the system will take the total adjustment of -20 and deduct it from the base price of 100 for a final adjusted price of 80.
- **Increment Adjustments:** Each valid adjustment is made against the current (base or adjusted) price. For example, if you have a base price of 100 and two percentage adjustments (price rules) of -10% each, then the first adjustment is deducted from the base price of 100, for a current adjusted price of 90. The second adjustment of -10% is deducted from 90 for a final adjustment price of 81.

Seq – System generated number for the price adjustment.

Supp Loc – Supplier price location for this contract.

Match UOM - **Select** if this adjustment is to be based on the UOM. If you select this option, you can add rows to the Details grid and use either Pct (percentage) or Amt (amount) as the **Adjustment Method** in the **Details** grid.

UOM – This field is only available if you **select** Match UOM.



Match Ship to - Select if this adjustment is to be based on the ship to ID. For example, if the supplier gives you an additional 5% discount if you purchase items within Oklahoma, you could define a price adjustment for each ship to location within your state. When you select this option without also selecting **UOM Match**, no rows can be added in the **Details** grid and the **Adjustment Method** defaults to Pct (percentage) and cannot be overridden.

Ship To - This field becomes available for entry if you **select** the Match Ship option.

General Adjustment - Select if this is a general adjustment that does not fall into the classification of a UOM or ship to adjustment. When you select general adjustment, the **UOM Match** and **Match Ship** options become unavailable for entry. The **Adjustment Method** defaults to Pct (percentage) and cannot be overridden. If you select this option, no rows can be added to the **Details** grid.

Hard Price - Select if you want the system to apply the price resulting from an adjustment regardless of any other adjustments it finds.

Stop Price Calculation Here - Select to have the adjustment that you defined set a final price. If the check box is selected, the system does not calculate any further adjustments.

Ignore If Other Adjustments - Select this adjustment restriction to create a price adjustment scenario in which the system ignores this price adjustment if the contract qualifies for another adjustment. If another adjustment does not apply, this adjustment will apply even if the Ignore If Other Adjustments check box is selected.

Adjustment Method – Select whether to adjust the price by amount or percentage. Amounts and percents can be either positive or negative. A negative adjustment (discount) means the price or schedule value will be reduced by the adjustment. A positive adjustment (surcharge) means the price or schedule value will be increased by the adjustment.

- *Amt (amount)*: If you choose to adjust by amount, the Adjustment Amount field displays. This value applies only if the UOM Match option is selected.
- *Pct (percent)*: If you choose to adjust by a percentage, the Adjustment Percentage field displays.

Min Qty – The minimum quantity to which the price adjustment can be applied.

Max Qty – The maximum quantity to which the price adjustment can be applied.

Adjusted Price - Price after the adjustment is applied. This is calculated from the base price and only applies to line item adjustments. For ship to and general adjustments, the adjusted price is calculated based on the default base price.

Click the **OK** button to return to the contract header page.

Click the **Comment Bubble** icon on the line. You will be transferred to the Line Comments page.



Line Comments Page

This page is similar to the header comments page. Enter any comments that you want to apply to a specific line on the contract. Select the documents that you want the Line comments to be visible on (e.g., Send to Supplier, Shown at Receipt, Shown at Voucher and/or Copy to PO).

Click the [Standard Comments](#) link to add pre-defined comments to the contract. If there are associated files that you want to attach, **click** the **Attach** button to find the associated document (e.g., Microsoft Word, Excel, or PDF file). **Enter** file path or **click** the **Choose File** button to locate desired file.

Click the **Upload** button to attach a file to the contract.

Click the **OK** button to return to the Header page.

Click the **Save** button. Note the Contract Number.



Copy Contract ID Option

Contract Entry

Contract

SetID 00000 [Copy From Contract](#)

Contract ID NEXT

*Status Open

Administrator/Buyer

Contract Version

Version 1

Status Current

Approval Due Date

Add a Document

From the **Contract Entry** page, click the [Copy From Contract](#) link – This is an option that allows you to copy the information from another Contract into a new contract.

Copy Contract ID

Contract Entry

Copy Contract

SetID 00000

Contract ID NEXT

Contract Search

Contract ID

Supplier

Supplier ID

Master Contract ID

Allow Open Item Reference

Search

Select Contract

Contracts | More Details

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

OK Cancel Refresh

If you want to copy an existing Contract, enter the Contract ID and click the **Search** button.

Select the contract you want to use by **clicking** the Sel box to the left of the Contract ID

Click the **OK** button to return to the Contract Header.

Process Scheduler Request Page

Process Scheduler Request

User ID: BBENN06 Run Control ID: CONTRACTDISP

Server Name: Run Date: 08/05/2024

Recurrence: Run Time: 12:03:53PM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Contract Dispatch & Email	CONDISP	PSJob	(None)	(None)	Distribution
<input checked="" type="checkbox"/>	Vendor Contract Dispatch/Print	POCNT100	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Email	PO_CON_EMAIL	Application Engine	Web	TXT	Distribution

[OK](#) [Cancel](#)

Server Name – Leave server name blank to default, or select the PSNT server option.

Check the Vendor Contract Dispatch/Print option. The user can change the **Type** and **Format** options. For example, **Email** can be selected for the **Type** option to have the process sent to the user’s email.

Click the OK button to return to the Dispatch Supplier Contracts page and **click the [Process Monitor](#)** link in upper right corner of page. You will be transferred to the Process List Page where you can review the progress of the process.

Process List Tab

Process List Server List

View Process Request For

User ID: BBENN06 Type: Last: 1 Days [Refresh](#)

Server: Name: Instance From: Instance To: [Clear](#)

Run Status: Distribution Status: Save On Refresh [Report Manager](#) [Reset](#)

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	29239910		SQR Report	POCNT100	BBENN06	08/05/2024 12:03:53PM CDT	Queued	N/A	Details	Actions

When the Run Status = “Success” and Distribution Status = “Posted” **click the [Details](#)** link. You will be transferred to the Process Detail Page.

Process Detail Page

Process Detail
✕

[Help](#)

Process

Instance 29239910	Type SQR Report
Name POCNT100	Description Vendor Contract Dispatch/Print
Run Status Success	Distribution Status Posted

Run

Run Control ID CONTRACTDISP	Update Process
Location Server	<input type="radio"/> Hold Request
Server PSNT	<input type="radio"/> Queue Request
Recurrence	<input type="radio"/> Cancel Request
	<input type="radio"/> Delete Request
	<input type="radio"/> Re-send Content
	<input type="radio"/> Restart Request

Date/Time

Request Created On 08/05/2024 12:06:34PM CDT	Parameters
Run Anytime After 08/05/2024 12:03:53PM CDT	Message Log
Began Process At 08/05/2024 12:06:49PM CDT	Batch Timings
Ended Process At 08/05/2024 12:07:01PM CDT	View Log/Trace

Transfer

OK
Cancel

Click the [View Log/Trace](#) link.

View Log/Trace
✕

[Help](#)

Report

Report ID 25963244	Process Instance 29239910	Message Log
Name POCNT100	Process Type SQR Report	
Run Status Success		

Vendor Contract Dispatch/Print

Distribution Details

Distribution Node OOD_REPNODE	Expiration Date 08/19/2024	
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File List

Name	File Size (bytes)	Datetime Created
POCNT100_29239910.PDF	11,709	08/05/2024 12:07:01.959452PM CDT
POCNT100_29239910.out	241	08/05/2024 12:07:01.959452PM CDT
SQR_POCNT100_29239910.log	1,926	08/05/2024 12:07:01.959452PM CDT

Distribute To

Distribution ID Type	Distribution ID
User	BBENN06

Return

Click the [.PDF](#) link to view the contract and print it.

PO Contract Line Tab

To review information on PO activity against the contract, navigate to the Review Contracts by PO.

Navigation: *Procurement Contracts > Review Contract Information > Review Contracts by PO.*

Review Contracts by PO

*SetID 🔍

*Contract ID 🔍

Version From RFQ ID 5800000002

Item ID 🔍

Category Code 🔍

Contract Line 🔍

Category Line Number 🔍

Supplier Item ID 🔍

Manufacturer ID 🔍

Manufacturer's Item ID 🔍

UPN Type Code 🔍

UPN ID 🔍

Search Options

PO with Contract

PO without Contract

SetID – Enter “00000”.

Contract ID – Enter the Contract ID or click the looking glass icon.

Item ID – Enter a specific item or click the looking glass icon.

PO With Contract – Check the box and click the Search button to view all POs released against this contract.

PO Without Contract – Check the box and click Search button to view all the POs, whether or not they were released against this contract.



List of Purchase Orders

List of Purchase Orders

1-10 of 104 | View 100

Details | Item Information |

Select	Version	Business Unit	Purchase Order	Line	Line Status	Up-To-Date Quantity	Up-To-Date Amount	Currency	Item ID	More Information
<input type="checkbox"/>	1	04000	0409003906	1	Canceled	2.00	1,788.000	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409003906	2	Canceled	2.00	-1,788.000	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409003906	3	Closed	2.00	945.260	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409003906	4	Closed	10.00	192.700	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409003906	5	Closed	1.00	27.000	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409003975	1	Closed	2.00	600.000	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409003990	1	Closed	1.00	300.000	USD	02086010001	SERVER SOFTWARE
<input type="checkbox"/>	1	04000	0409004004	1	Closed	1.00	300.000	USD	02086005001	APPLICATION SOFTV
<input type="checkbox"/>	1	04000	0409004072	1	Closed	1.00	300.000	USD	02086005001	APPLICATION SOFTV
<input type="checkbox"/>	1	04000	0409004072	2	Closed	5.00	611.750	USD	02086005001	APPLICATION SOFTV

Select the purchase order you wish to view by clicking the box in the **Select** row. The links at the bottom of the page become available.

Click the [Inquire](#) link to go to the PO inquiry page.

Click the [Update](#) link to change the PO.

Click the [Activity Summary](#) link to view the receiving, voucher and matching activity against the PO associated with the contract.

