

State of Oklahoma

COR211

Contracts Manual

Office of Management & Enterprise
Services



OKLAHOMA

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Document History

Document Revision	Date	Description
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 screenshots and processes
1.5	11/12/2024	Updated screenshots and processes
1.6	4/23/2026	Updated screenshots



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 **selecting 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. **Selecting 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

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

The screenshot shows a web form titled "Contract Entry" with a sub-tab "Add a New Value". In the top right corner of the form area, there is a button labeled "Find an Existing Value". The main form area contains several input fields: "SetID" with the value "00000", "*Contract ID" with the value "NEXT", "Style ID" with the value "PO", and "*Contract Process Option" with a dropdown menu set to "Purchase Order". At the bottom left of the form, there is an "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.

Select 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

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



Contract Entry

Find an Existing Value ⊕ Add a New Value

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

🕒 Recent Searches Choose from recent searches ▼ ✎ 📌 Saved Searches Choose from saved searches ▼ ✎

*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 ▼

^ Show fewer options

Case Sensitive

Search

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.)

Select 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: 9000 Copy From Contract Contract Version: 1 Status: Current

Contract ID: NEXT Version: 1 Status: Current

*Status: Open Approved Date: [Date]

Administrative Buyer: [Field] Add a Document

*** Header**

*Contract Style: Purchase Order

Process Option: Purchase Order

*Supplier: [Field] Supplier Search

*Supplier ID: [Field] Supplier Search

Primary Contract: [Field]

Supplier Contract Ref: [Field]

Description: [Field]

Master Contract ID: [Field]

*Sign Date: 08/02/2024

Expire Date: [Field]

Renewal Date: [Field]

Control type: [Field]

Tax Exempt Tax Exempt ID: [Field]

Lock Chartfields

Standard Contract

Currency: USD

Rate Date: 08/02/2024 **PRINT**

Must Use Contract Rate Date

Allow Multicurrency PO

*** Amount Summary**

Maximum Amount: 0.00 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

Adjust Supplier Pricing First

Price Can Be Changed on Order

[Add Open Item Price Adjustments](#)

*** Contract Items**

Category 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 SRC Type	Description	UOM	Category	Include for Release	Status
1	[Field]	[Field]	[Field]	[Field]	[Field]	[Field]	[Field]	Active

View Category Hierarchy Category Search

*** Contract Categories**

Details Pricing Options Release Amounts Spend Threshold

Line	Category	Description	Status
1	[Field]	[Field]	Active

Save Notify Refresh Add Update/Cancel Contract 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 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.

Select 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

Select 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.

Select 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:

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 0000072514 SMITH FARM AND GARDEN INC

Primary Contact

Supplier Contract Ref

Description Lawn Mowers

Master Contract ID

*Begin Date 08/02/2024

Expire Date 08/02/2025

Renewal Date

Control Type

Tax Exempt Tax Exempt ID

Auto Default

Lock Chartfields

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 11/12/2024 CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

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

Adjust Supplier Pricing First

Price Can Be Changed on Order

Add Open Item Price Adjustments

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

1-1 of 1 View All

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

View Category Hierarchy Category Search

Contract Categories

Lines

1-1 of 1 View All

Line	Category	Description	Status
1			Active

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

Header Comments Page

The screenshot shows the 'Contract Comments' window. At the top, it displays 'Contract Entry' and 'Header Comments'. Below this, there are fields for 'SetID' (00000), 'Contract ID' (NEXT), and 'Version' (1). There are two dropdown menus: '*Sort Method' set to 'Comment Time Stamp' and '*Sort Sequence' set to 'Ascending', with a 'Sort' button to the right. Below the sorting options is a 'Comments' section with a search icon, navigation arrows, and '1 of 1' and 'View All' indicators. Underneath is a 'Use Standard Comments' section with a 'Comment Status' set to 'Active' and an 'Inactivate' button. A large text area for comments is present. Below the text area are three checkboxes: 'Send to Supplier' (checked), 'Show at Receipt' (unchecked), and 'Copy to Purchase Order' (unchecked). There is also a 'Show at Voucher' checkbox. The 'Associated Document' section has an 'Attachment' field and buttons for 'Attach', 'View', 'Delete', and an 'Email' checkbox. At the bottom, it says 'From -> CNT 00000-NEXT' and has 'OK', 'Cancel', and 'Refresh' buttons.

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.

Select 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.

Select the **Inactivate** button to deactivate a current comment. If you deactivated a comment by mistake, **select** 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.

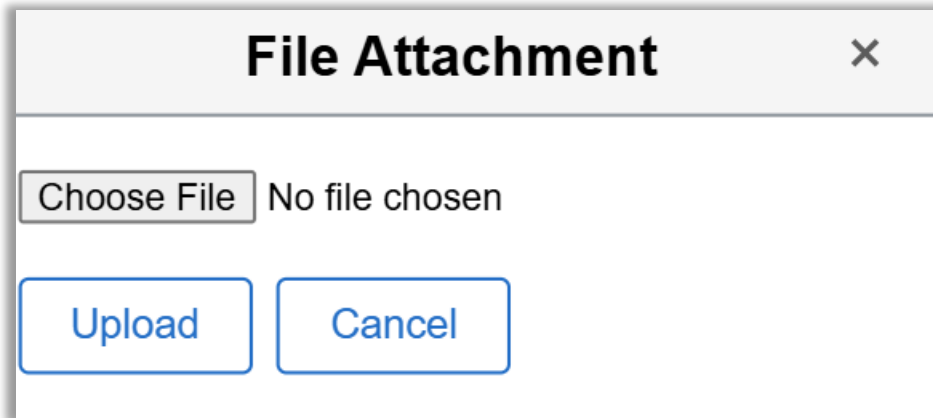
Shown at Receipt – Check the box if you want the comment to be visible on receipt documents.

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.

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



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

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

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

Action – Select “Copy Comment” ONLY.

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

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

To add additional comments, **Select** 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 **Select** the right arrow button to go to the next comment or **Select** [View All](#) to see all the comments in the scroll area. To return to viewing only one line and its associated schedules, **Select** [View 1](#).

When you have finished entering your standard comments, **Select** 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

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 08/02/2024

Expire Date 08/02/2025

Renewal Date

Control Type

Tax Exempt Tax Exempt ID

Auto Default

Lock Chartfields

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 08/02/2024 CRRNT

Must Use Contract Rate Date

Allow Multicurrency PO

Amount Summary

Contract Open Item Reference

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

1-1 of 1 View All

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

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

View Category Hierarchy Category Search

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:

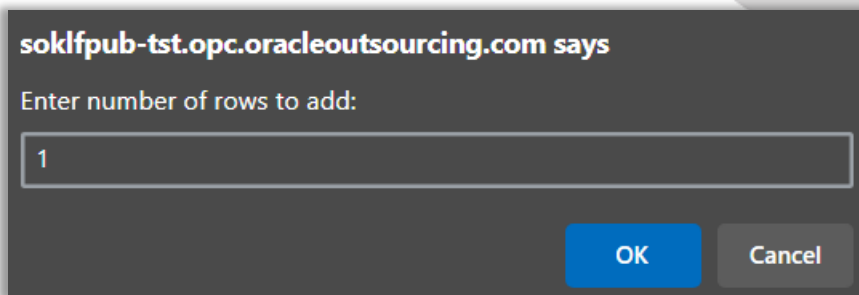
- The quantity field is set to “1” and is unavailable for editing.
- The Merch Amt on the contract line becomes a required field.

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 **select** the **plus** button. The following popup window appears:



soklpub-tst.opc.oracleoutsourcing.com says

Enter number of rows to add:

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

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

View Category Hierarchy Category Search

Select 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 Status Active Physical Nature Goods

Category ID 55242

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

Price Qty Line Quantity

Qty Type Current Order Quantity

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

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

	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.

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.

Select 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), **select** the **Price Adjustment** icon. You will be transferred to the PO Line Pricing Adjustments page.

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



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.

The screenshot shows the 'Contract Price Adjustments' window. At the top, it displays 'Contract Entry' and 'Price Adjustments for Item Line 1'. Below this, there are fields for 'SetID 00000', 'Contract ID NEXT', 'Version 1', and 'Line: 1 MOWER: Lawn'. A search bar and navigation controls are present. The main configuration area is divided into three sections: 'Criteria', 'Method', and 'Restrictions'. The 'Criteria' section has 'Sequence: 1' and a search field for 'Supp Loc:'. The 'Method' section has checkboxes for 'General Adjustment', 'Match Shipto', and 'Match UOM', with corresponding search fields for 'Ship To:' and 'UOM:'. The 'Restrictions' section has checkboxes for 'Hard Price', 'Ignore If Other Adjustments', and 'Stop Price Calculation Here'. Below these is the 'Adjustment Detail' table with columns for '*Method', 'Percentage', and 'Adjusted Price'. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons.

*Method	Percentage	Adjusted Price
Percentage		

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.

Select 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

Select 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 Comment Time Stamp *Sort Sequence Ascending Sort

Comments 1 of 1 View All

Use Standard Comments Use Item Specifications

Comment Status Active Inactivate +

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

Associated Document

Attachment Attach View Delete Email

From -> CNT 00000-NEXT

OK Cancel Refresh

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).

Select the [Standard Comments](#) link to add pre-defined comments to the contract. If there are associated files that you want to attach, **select** 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.

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

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

Select 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.

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

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



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, **select** 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 **select** the **Search** button.

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

Select 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

Find an Existing Value ⊕ Add a New Value

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

🕒 **Recent Searches** Choose from recent searches ✎

🔖 **Saved Searches** Choose from saved searches ✎

Run Control ID begins with

^ Show fewer options

Case Sensitive

Search Clear

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



Process Scheduler Request Page

X
Help

User ID SFOX Run Control ID contractdisp

Server Name

Recurrence

Time Zone

Run Date

Run Time

Reset to Current Date/Time

Process List

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

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.

Select the OK button to return to the Dispatch Supplier Contracts page and **select 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 Requests

User ID Type Last Days

Server Name Instance Range

Run Status Distribution Status Save On Refresh Report Manager

Process List

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	32343558		contractdisp	SQR Report	POCNT100	SFOX	04/20/2026 9:55:01AM CDT	Success	Posted	Details	Actions

Go back to Dispatch Supplier Contracts

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

Process Detail Page

Process Detail
×

[Help](#)

Process

Instance	32343558	Type	SQR Report
Name	POCNT100	Description	Vendor Contract Dispatch/Print
Run Status	Success	Distribution Status	Posted

<p>Run</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Run Control ID</td> <td>contractdisp</td> </tr> <tr> <td>Location</td> <td>Server</td> </tr> <tr> <td>Server</td> <td>PSNT</td> </tr> <tr> <td>Recurrence</td> <td></td> </tr> </table>	Run Control ID	contractdisp	Location	Server	Server	PSNT	Recurrence		<p>Update Process</p> <p> <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 </p> <p style="text-align: right;"><input type="radio"/> Restart Request</p>
Run Control ID	contractdisp								
Location	Server								
Server	PSNT								
Recurrence									

Date/Time	Actions
Request Created On 04/20/2026 9:59:13AM CDT	Parameters Transfer
Run Anytime After 04/20/2026 9:55:01AM CDT	Message Log
Began Process At 04/20/2026 9:59:46AM CDT	Batch Timings
Ended Process At 04/20/2026 9:59:49AM CDT	View Log/Trace

OK
Cancel

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

View Log/Trace
×

[Help](#)

Report

Report ID	28845542	Process Instance	32343558	Message Log
Name	POCNT100	Process Type	SQR Report	
Run Status	Success			

Vendor Contract Dispatch/Print

Distribution Details

Distribution Node	OOD_REPTEST	Expiration Date	<input type="text" value="05/04/2026"/>
-------------------	-------------	-----------------	---

File List

Name	File Size (bytes)	Datetime Created
POCNT100_32343558.PDF	16,597	04/20/2026 9:59:49.579518AM CDT
POCNT100_32343558.out	238	04/20/2026 9:59:49.579518AM CDT
SQR_POCNT100_32343558.log	1,923	04/20/2026 9:59:49.579518AM CDT

Distribute To

Distribution ID Type	<input type="text" value="Distribution ID"/>
User	SFOX

Return

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.

Select 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



Contract Entry

Find an Existing Value Add a New Value

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

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

*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

^ Show fewer options
 Case Sensitive

Search Clear

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.)

Select 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: 1 Status: Draft

Contract ID: NEXT Approval Due Date: []

*Status: Open

Administration: []

Header

*Contract Style:

Process Option:

*Supplier: []

*Supplier ID: []

Primary Contact: []

Supplier Contract Ref: []

Description: []

Master Contract ID: []

*Begin Date: 08/02/2014

Expire Date: []

Renewal Date: []

Contract Type: []

Tax Exempt Auto Default Lock Charfields Tax Exempt ID: []

Standard Contract Print

Currency: USD

Rate Date: 08/02/2014

Must Use Contract Rate Date Allow Multicurrency PO

Amount Summary

Maximum Amount: 0.00 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

Lines

Line	Item	Line Src Flag	Line Src Type	Description	UCM	Category	Include for Release	Status
1	[] <input type="button" value="Q"/>	[]	[] <input type="button" value="Q"/>	[] <input type="button" value="Q"/>	[] <input type="button" value="Q"/>	[] <input type="button" value="Q"/>	<input type="checkbox"/>	Active

Contract Categories

Line	Category	Description	Status
1	[] <input type="button" value="Q"/>	[] <input type="button" value="Q"/>	Active

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.”

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



Thresholds & Notifications

Thresholds & Notifications x

Send Date/Amount Notification Send Threshold Notification
 Help

[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 08/05/2025

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

Select 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.

Select 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.

Contract Entry

Contract

SetID 00000 Copy From Contract Contract Version
 Contract ID NEXT Version 1 Status Current
 *Status Open Approval Due Date [Calendar Icon]

Administrator/Buyer [Search] Add a Document

Header

*Contract Style Purchase Order
 Process Option Purchase Order
 *Supplier SMITH FARM-001 Supplier Search
 *Supplier ID 0000072914 SMITH FARM AND GARDEN INC
 Primary Contact [Search]
 Supplier Contract Ref [Search]
 Description Lawn Mowers
 Master Contract ID [Search]
 *Begin Date 08/05/2024
 Expire Date 08/05/2025
 Renewal Date [Calendar Icon]
 Control Type Business Unit
 Tax Exempt Tax Exempt ID [Search]
 Auto Default
 Lock Chartfields

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 11/12/2024 CRRNT
 Must Use Contract Rate Date
 Allow Multicurrency PO

Contract Control

Business Unit

*Business Unit	Description
1	[Search]

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
 Adjust Supplier Pricing First
 Price Can Be Changed on Order
 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	[Search]	[Search]	[Search]	[Search]	[Search]	[Search]	<input checked="" type="checkbox"/>	Active

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.

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

Header Comments Page

The screenshot shows a window titled "Contract Comments" with a "Contract Entry" header. Below the header, the following information is displayed:

- SetID: 00000, Contract ID: NEXT, Version: 1
- *Sort Method: Comment Time Stamp (dropdown), *Sort Sequence: Ascending (dropdown), and a Sort button.
- Comments section with a search icon, navigation arrows, and "1 of 1" page indicator, and a View All button.
- Use Standard Comments: Comment Status: Active, Inactivate button, and a plus sign button.
- Checkboxes: Send to Supplier, Show at Receipt, Copy to Purchase Order, and Show at Voucher.
- Associated Document section with an Attachment field, Attach button, View button, Delete button, and Email checkbox.
- Footer: From -> CNT 00000-NEXT, OK, Cancel, and Refresh buttons.

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.

Select 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.

Select the **Inactivate** button to deactivate a current comment. If you deactivated a comment by mistake, **select** 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.

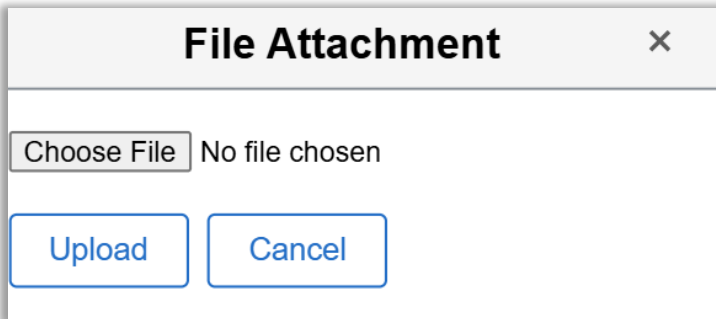
Show at Voucher - Check the box if you want the comment to be visible on vouchers.

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.

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

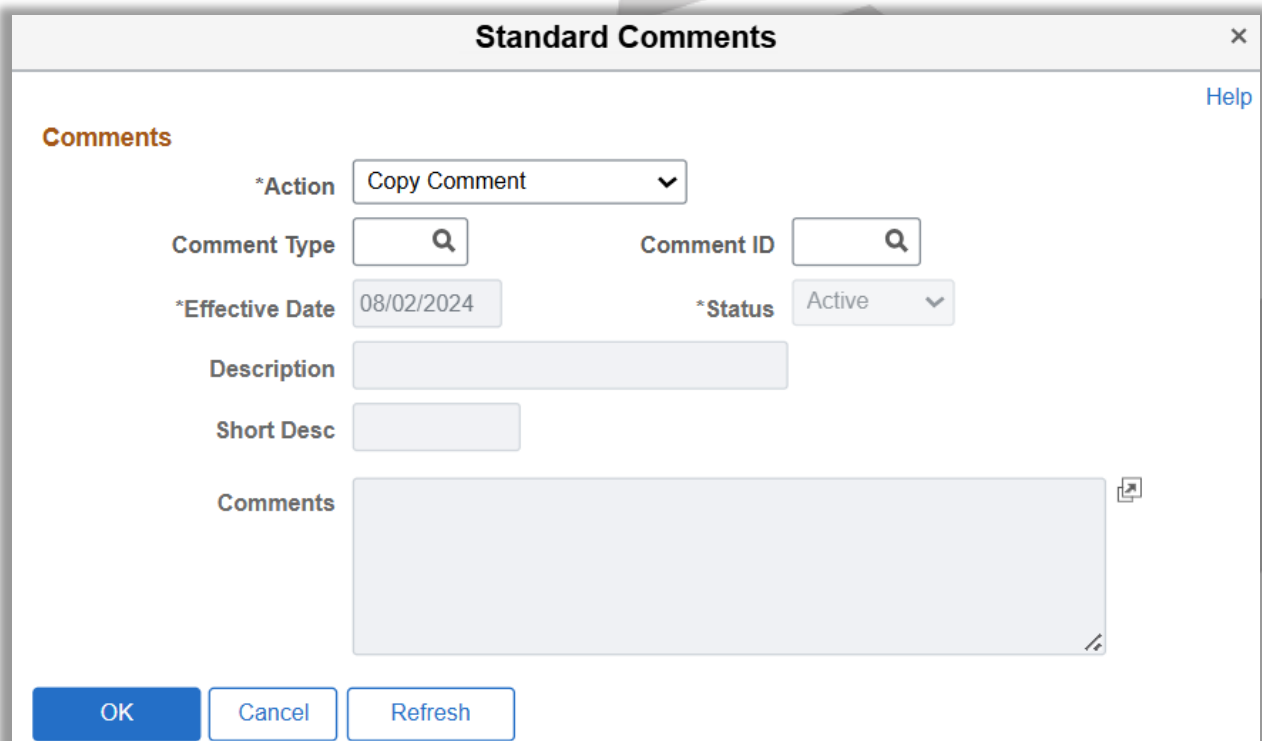


The image shows a 'File Attachment' dialog box with a close button (X) in the top right corner. Below the title bar, there is a 'Choose File' button followed by the text 'No file chosen'. At the bottom of the dialog, there are two buttons: 'Upload' and 'Cancel'.

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

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

Select [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 content area is titled 'Comments' and contains several fields:

- *Action: A dropdown menu with 'Copy Comment' selected.
- Comment Type: A text input field with a magnifying glass icon.
- Comment ID: A text input field with a magnifying glass icon.
- *Effective Date: A text input field with '08/02/2024' entered.
- *Status: A dropdown menu with 'Active' selected.
- Description: A large text input field.
- Short Desc: A smaller text input field.
- Comments: A large text area with a magnifying glass 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 – Select the **looking glass** icon to lookup the Standard Type that you want to use.

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

To add additional comments, **select** 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 **select** the **right arrow** button to go to the next comment or **select** **View All** to see all the comments in the scroll area. To return to viewing only one line and its associated schedules, **select** **View 1**.

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

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



Step 3 – Enter PO Defaults

Select 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 000072514

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](#) AM Business Unit

Location Capitalize

IN Unit Profile ID

Freight Terms Cost Type

Ship Via Ultimate Use Code

Charge By Where Performed

Distributions

1-1 of 1 | View All

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 select the **looking glass** icon.

Origin – Enter the origin or **select** the **looking glass** icon.

Currency – Enter currency.

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

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

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

Location – Enter the location or **select** the **looking glass** icon.

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

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

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

Charge By – Defaults to quantity.

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

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

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

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

Where Performed – **Select** 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.

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



Step 4 – Enter Line Information

Contract Entry

Contract

Contract ID: 0000 Old Form Contract Contract Version: 1 Status: Current

Contract ID: NEXT Status: CP44 Approval Due Date: []

Administrative User: [] Add a Document

Header

*Contract Style: Purchase Order

Process Option: Purchase Order

*Supplier: SMITH FARM B01 Supplier Search

*Supplier ID: 000872314 SMITH FARM AND GARDEN INC

Primary Contact: []

Supplier Contract Ref: []

Description: Lawn Mower

Master Contract ID: []

*Begin Date: 00/05/2024

Expire Date: 00/05/2025

Renewal Date: []

Control Type: Business Unit

Tax Exempt Tax Exempt ID: []

Auto Default

Lock Chartfields

Statewide Contract:

Currency: USD

Rate Date: 00/05/2024 CRRBY: []

Must Use Contract Rate Date

Allow Multicurrency PO

Contract Control

Business Unit

*Business Unit	Description
1	

Amount Summary

Master Amount	1,008.00	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

Item Search Search for Contract Lines

Lines

Line	Item	Line Src Flag	Line Src Type	Description	UOM	Category	Include for Release	Status
1	10001247			MOWER Lawn	EA	27112614		Active

Save Refresh Refresh

Add Update/Display Contract 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 – Select 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 **Select** the **plus** button. The following popup window appears:

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Enter number of rows to add:

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

Select 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 FO 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	+	-

Custom Fields

OK
Cancel
Refresh

Select 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:

Price Qty:

Qty Type:

Use Supp Price UOM Adjustments

Use Supplier Price Shipto Adj

Adjust:

Order By Amount

Amount Only

Merchandise Amount:

Schedule Defaults

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

UOM/Pricing

	Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr		
<input checked="" type="checkbox"/>	<input type="text" value="0001"/>	<input type="text" value="EA"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00000"/>	USD	<input type="text" value="+"/>	<input type="text" value="-"/>

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		
<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="1.0000"/>	EA	<input type="text" value="+"/>	<input type="text" value="-"/>

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.

Select 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		Active

If you want to add a price adjustment (e.g., the contract allows a standard 10% discount on the item on Line 1), **select 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.

Contract Price Adjustments

Contract Entry

Price Adjustments for Item Line 1

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

Price Adjustments [Search] | 1 of 1 | View All

*Effective Date: 08/05/2024 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule [Search] | 1 of 1 | View All

Criteria

Sequence: 1
Supp Loc: [Search]

Method

General Adjustment
 Match Shipto
Ship To: [Search]
 Match UOM
UOM: [Search]

Restrictions

Hard Price
 Ignore If Other Adjustments
 Stop Price Calculation Here

Adjustment Detail

*Method	Percentage	Adjusted Price
Percentage	[Search]	1000.00000

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.

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

Select the **Comment Bubble** icon on the line. 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 **Comment Time Stamp** *Sort Sequence **Ascending** **Sort**

Comments | 1 of 1 | View All

Use Standard Comments Comment Status **Active** **Inactivate** +

Use Item Specifications

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

Associated Document

Attachment **Attach** **View** **Delete** Email

From -> CNT 00000-NEXT

OK **Cancel** **Refresh**

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).

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



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

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

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



Copy Contract ID Option

Contract Entry

Contract

SetID 00000 [Copy From Contract](#)

Contract ID NEXT

*Status Open

Contract Version

Version 1 Status Current

Approval Due Date

Administrator/Buyer

Add a Document

From the **Contract Entry** page, **select** 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 **select** the **Search** button.

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

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

Process Scheduler Request Page

X
Help

User ID SFOX Run Control ID contractdisp

Server Name

Run Date

Recurrence

Run Time
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.

Select 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.

Select the **OK** button to return to the Dispatch Supplier Contracts page and **select** 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 Requests

User ID: Type: Last: Days:

Server: Name: Instance: Range:

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

Process List

 |< < 1-1 of 1 > > | View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	32343558		contractdisp	SQR Report	POCNT100	SFOX	04/20/2026 9:55:01AM CDT	Success	Posted	Details	Actions

[Go back to Dispatch Supplier Contracts](#)

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



Process Detail Page

Process Detail [X] [Help]

Process

Instance	32343558	Type	SQR Report
Name	POCNT100	Description	Vendor Contract Dispatch/Print
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	contractdisp
Location	Server
Server	PSNT
Recurrence	

Update Process

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Re-send Content
 Restart Request

Date/Time

Request Created On	04/20/2026 9:59:13AM CDT
Run Anytime After	04/20/2026 9:55:01AM CDT
Began Process At	04/20/2026 9:59:46AM CDT
Ended Process At	04/20/2026 9:59:49AM CDT

Actions

[Parameters](#) Transfer
[Message Log](#)
[Batch Timings](#)
[View Log/Trace](#)

OK Cancel

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



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 From RFQ ID 5800000002

Version

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 **select** the **looking glass** icon.

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

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

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



List of Purchase Orders

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.

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

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

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

