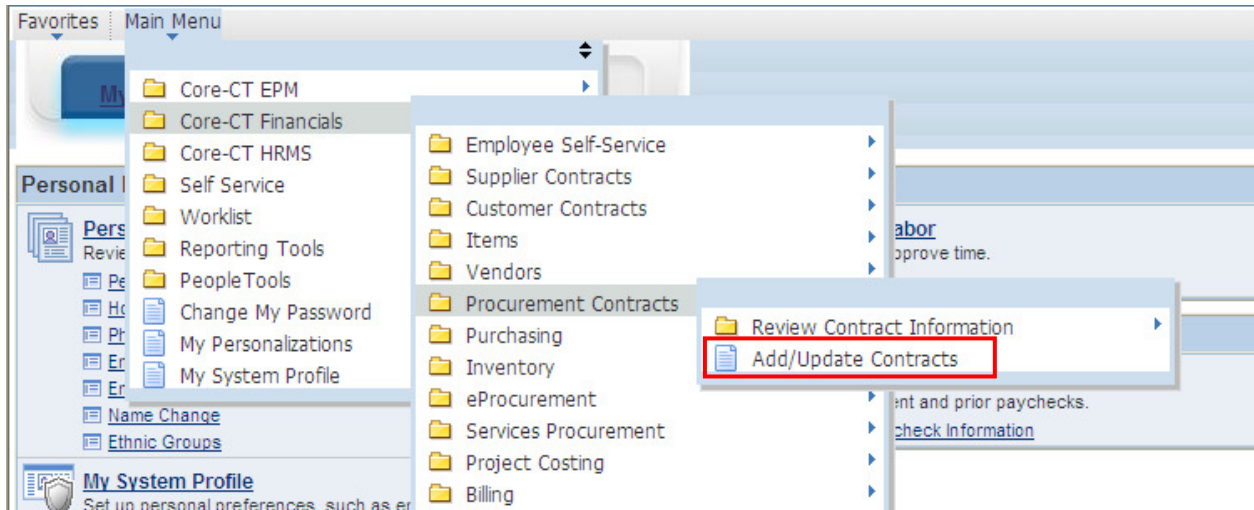


Contracts

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



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

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

- The first 2 characters are numeric for the calendar year that the contract is being created in. For example if the contract is being created in calendar year 2005, the numeric is 05.
- The three characters to represent the Agency: if this contract was being created by the Department of Transportation, the user would input DOT.
- The four sequential numbers represent the contract number, such as 9999.
- The 2 alpha characters to represent the vendor. In the event that more than one vendor is awarded this contract, these letters differentiate between vendors. The first alphas used would be AA, followed by AB, AC, etc.

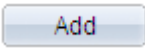
In this example the contract number would be: 05DOT9999AA. If there was an additional vendor awarded on this contract the next contract number to be used would be: 05DOT9999AB.

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

Contract Process Option: There are several types of contracts: In Core-CT we only use two of these types: Purchase Order or General.

- Select **Purchase Order** for purchase order contracts, where no retention is held back on the voucher.
- Select **General Contract** when you need to retain monies on the vouchers. Selecting General will open the voucher retention links on the bottom of the Contract Header Page.

For the **Contract Process Option**, select Purchase Order from the drop down menu.

Click the  button.



Contract Entry

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

SetID: STATE

Contract ID: 05DOT9999AA

Contract Process Option: Recurring PO Voucher

[Add](#)


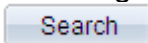
General Contract
Prepaid Voucher
Prepaid Voucher w/ Advance PO
Purchase Order
Recurring PO Voucher
Recurring Voucher
Release to Single PO Only

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

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

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

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





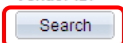
This will open a new screen where you can search for an existing contract by Contract ID, Vendor, or Vendor ID. Use the search icon  to look for existing values. Once you have found the contract you are looking for, click .


Contract Entry


Copy Contract

SetID: STATE
Contract ID: 05DOT9999AA




Contract Search

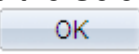
Contract ID:  Master Contract ID: 
Vendor:  Allow Open Item Reference
Vendor ID: 


Select Contract Personalize | Find |  First 1 of 1 Last

Contracts More Details 

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






This will bring the contract information down to the Select Contract section. Check the box next to the contract, then click .


Contract Entry


Copy Contract

SetID: STATE
Contract ID: 05DOT9999AA




Contract Search

Contract ID:  Master Contract ID: 
Vendor:  Allow Open Item Reference
Vendor ID: 


Select Contract Personalize | Find |  First 1 of 1 Last

Contracts More Details 

Sel	Contract ID	Version	Description	Vendor ID	Short Vendor Name	Vendor Contract Ref
<input checked="" type="checkbox"/>	14DOT0002AA	1		0000010009	061043422F-001	

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

Contract

Contract Entry

Contract

Contract Version

Version: 1 Status: Current

[New Version](#) Approval Due Date:

SetID: STATE

Contract ID: 05DOT9999AA

*Status:

Administrator/Buyer:

Header

CT Contract Type:

Process Option: Purchase Order

Vendor: [Vendor Search](#)

*Vendor ID: 0000010009 SUBURBAN STATIONERS INC

*Begin Date: 01/11/2013

Expire Date: 01/10/2014

Renewal Date:

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt

[Add Comments](#)

[Contract Activities](#)

[Primary Contact Info](#)

[Contract Releases](#)

[Activity Log](#)

[Document Status](#)

[Thresholds & Notifications](#)

Amount Summary

Maximum Amount:	100,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
PCard Swipe Amount:	0.00	
Total Released Amount:	0.00	
Remaining Amount:	100,000.00	
Remaining Percent:	100.00	

Order Contract Options

<input type="checkbox"/> Allow Multicurrency PO	<input type="checkbox"/> Allow Open Item Reference	<input checked="" type="checkbox"/> Must Use Contract Rate Date	Rate Date: 01/14/2013
<input checked="" type="checkbox"/> Corporate Contract	<input type="checkbox"/> Adjust Vendor Pricing First	<input checked="" type="checkbox"/> Auto Default	
<input type="checkbox"/> Lock Chartfields	<input checked="" type="checkbox"/> Price Can Be Changed on Order	*Dispatch Method: <input type="text" value="Print"/>	<input type="button" value="Dispatch"/>

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

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

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

Contract Version: A separate job aid will be available to discuss the use of Contract Versions. Since this is a new contract, the value will always be one and new version button will be disabled. You may enter an approval due date if applicable.

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

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

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

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

Contract Entry
Contract

SetID: STATE [Copy From Contract](#)
 Contract ID: 05DOT9999AA
 *Status: Open

Administrator/Buyer:

Contract Version
 Version: 1 Status: Current
 Approval Due Date:

Header

CT Contract Type:
 BU Award
 Constr.
 GL
 Grant
 Loan
 MA
 MOU
 POC Comp
 PON Noncom
 PSC Comp
 PSN Noncom
 Right of Wa
 Rntl Lease
 SCS
 Stand Tran
 Statewide
 UFA

Process Option:

Vendor: [Vendor Search](#)

*Vendor ID:

*Begin Date:

Expire Date:

Renewal Date:

Currency:

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt

Order Contract Options

Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields

Allow Open Item Reference
 Adjust Vendor Pricing First
 Price Can Be Changed on Order

Must Use Contract Rate Date
 Auto Default
 *Dispatch Method: [Print](#) [Dispatch](#)

Rate Date: 01/11/2013

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Releases](#)

[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)

Amount Summary

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

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

SetID: STATE [Copy From Contract](#)
 Contract ID: 05DOT9999AA
 *Status: Open

Administrator/Buyer:

Contract Version
 Version: 1 Status: Current
 Approval Due Date:

Header

CT Contract Type: POC Comp

Process Option: General Contract

Vendor: [Vendor Search](#)

*Vendor ID:

*Begin Date: 01/11/2013

Expire Date:

Renewal Date:

Currency: USD [CRRNT](#)

Primary Contact:

Vendor Contract Ref:

Description:

Master Contract ID:

Tax Exempt

Order Contract Options

Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields

Allow Open Item Reference
 Adjust Vendor Pricing First
 Price Can Be Changed on Order

Must Use Contract Rate Date
 Auto Default
 *Dispatch Method: [Print](#) [Dispatch](#)

Rate Date: 01/11/2013

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Releases](#)

[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)

Amount Summary

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

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

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

Vendor Search

Search Criteria

Name:	<input type="text"/>	ShortName:	<input type="text"/>
Alternate Vndr Name:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text"/>
Country:	<input type="text"/>	Postal:	<input type="text"/>
Class:	<input type="text"/>	Type:	<input type="text"/>
Max Rows:	<input type="text" value="10"/>		

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

Sel	Vendor ID	Address	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>					

Vendor Detail Address

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

Results returned will show in the Search Results view.

Vendor Search

Search Criteria

Name:	<input style="border: 2px solid red;" type="text" value="suburban"/>	ShortName:	<input type="text"/>
Alternate Vndr Name:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text"/>
Country:	<input type="text"/>	Postal:	<input type="text"/>
Class:	<input type="text"/>	Type:	<input type="text"/>
Max Rows:	<input type="text" value="10"/>		

1 to 10 of 29

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

Sel	Vendor ID	Address	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>	0000010009	1	061043422F-001	SUBURBAN STATIONERS INC	N
<input type="checkbox"/>	0000010291	1	060738829F-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	060738829F-001	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	060738829F-001	SUBURBAN SANITATION SERVICE INC	N

Vendor Detail Address

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

Vendor Detail

SetID: STATE Vendor ID: 0000010009 Vendor Status: Approved
 Short Vendor Name: ██████████ Vendor Classification: Supplier
 In City Limit: HR Class:
 Vendor Name 2: Persistence: Regular
 Alternate Vndr Name Open For Ordering: Y
 Address: 00001 693 HIGH ST Withholding Applicable: N
 Corporate Vendor: 0000010009 SUBURBAN STATIONERS INC Display VAT Flag: N
 Remit Vendor: 0000010009 SUBURBAN STATIONERS INC

Vendor Types	
Type	Long Name

OK Cancel Refresh

Address

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

OK Cancel Refresh

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

Vendor Search

Search Criteria

Name:	<input type="text" value="suburban"/>	ShortName:	<input type="text"/>
Alternate Vndr Name:	<input type="text"/>	State:	<input type="text"/>
City:	<input type="text"/>	Postal:	<input type="text"/>
Country:	<input type="text"/>	Type:	<input type="text"/>
Class:	<input type="text"/>		
Max Rows:	<input type="text" value="10"/>		

1 to 10 of 29

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

Sel	Vendor ID	Address	Short Vendor Name	Name 1	Withholding Applicable
<input type="checkbox"/>	0000010009	1	...	SUBURBAN STATIONERS INC	N
<input type="checkbox"/>	0000010291	1	...	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	2	...	SUBURBAN SANITATION SERVICE INC	N
<input type="checkbox"/>	0000010291	3	...	SUBURBAN SANITATION SERVICE INC	N

Vendor Detail
Address

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

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

Continue entering Header Information:

▼ Header

CT Contract Type:	POC Comp	Add Comments
Process Option:	Purchase Order	Activity Log
Vendor:	<input type="text"/>	Contract Activities
*Vendor ID:	0000010009	Primary Contact Info
	SUBURBAN STATIONERS INC	Thresholds & Notifications
*Begin Date:	01/14/2013	Contract Releases
Expire Date:	01/14/2014	
Renewal Date:		
Currency:	USD	
Primary Contact:		
Vendor Contract Ref:		
Description:	POC For Office Supplies	
Master Contract ID:		
<input type="checkbox"/> Tax Exempt		

Amount Summary

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

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

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

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

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

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

Master Contract ID: This field is not used.

Tax Exempt: You can copy the tax exempt information from the PO Defaults.

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

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

Order Contract Options

Allow Multicurrency PO

Corporate Contract

Lock Chartfields

Allow Open Item Reference

Adjust Vendor Pricing First

Price Can Be Changed on Order

Must Use Contract Rate Date

Auto Default

*Dispatch Method:

Rate Date: 01/14/2013

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

- If the contract that you are creating is only for your agency's use, uncheck the **Corporate Contract** checkbox (the Corporate Contract checkbox is used for DAS statewide contracting. Selecting this checkbox allows all Business Units to utilize the contract and the Business Unit on the PO Defaults link is set to DASM1).
- Select **Lock Chartfields** if you do not want the chartfields on your PO to be different than what you entered in your contract.
- The **Allow Open Item Reference** should NEVER be selected for POC/N, PSC/N or SCS contracts types, if selected you will not be able to save the contract. For other contract types, selecting this checkbox would allow the purchase of all items from this vendor within the scope of the vendor contract.

- Select the **Price Can Be Changed on Order** checkbox; this will allow PO change orders to be created for POs associated with this contract.

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

Order Contract Options

<input type="checkbox"/> Allow Multicurrency PO	<input type="checkbox"/> Allow Open Item Reference	<input checked="" type="checkbox"/> Must Use Contract Rate Date	Rate Date: 01/14/2013
<input checked="" type="checkbox"/> Corporate Contract	<input type="checkbox"/> Adjust Vendor Pricing First	<input checked="" type="checkbox"/> Auto Default	
<input type="checkbox"/> Lock Chartfields	<input checked="" type="checkbox"/> Price Can Be Changed on Order	*Dispatch Method: <input type="button" value="Print"/> <input type="button" value="Dispatch"/>	

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

OPM Approval Number: enter the log number from the approved OPM PSC/N or POC/N Request form. (e.g., 2006-0711) If your contract falls below the dollar thresholds, and OPM Approval is not required, type **Not Reqd** in this field.

SetID: STATE Contract ID: 05DOT9999AA Version: 1

OPM Reporting Data Elements

OPM Approval Number	<input type="text" value="2006-0711"/>
OPM Contracted Entity	<input type="text"/>
OPM Statutory Reference	<input type="text"/>

OPM Contracted Entity: select entity from the dropdown menu.

SetID: STATE Contract ID: 05DOT9999AA Version: 1

OPM Reporting Data Elements

OPM Approval Number	<input type="text" value="2006-0711"/>
OPM Contracted Entity	<input type="text"/>
OPM Statutory Reference	<input type="text"/>

Federal Agency
Non-Profit
Not Applicable
Political Subdivision
Proprietary
State Agency

OPM Statutory Reference: select reference from the dropdown menu.

SetID: STATE Contract ID: 05DOT9999AA Version: 1

OPM Reporting Data Elements

OPM Approval Number: 2006-0711

OPM Contracted Entity: State Agency

OPM Statutory Reference:

- CGS 13B-20B
- CGS 4A-50
- CGS 4B-55
- CGS 4D-2 - Consultant Services
- Not Applicable

OK Cancel Ref

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

Please refer to the statutes for a more detailed explanation.

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

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

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 01/14/2013

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order *Dispatch Method: Print

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

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

Your **AM Business Unit** may default in. If not, enter manually if needed. You will only have to update this field if DASM1 defaults in instead of your agency business unit.

Contract Entry

PO Defaults

SetID: STATE Contract ID: 05DOT9999AA Version: 1 Vendor ID: 000010009

Header Find | View All First 1 of 1 Last

*Business Unit: DOTM1 [Copy from BU Defaults](#)

Vendor Loc: MAIN

Buyer:

Origin: 915

Currency: USD CRRNT Billing Location: DOTM1ADDR

Payment Terms ID: 000 Tax Exempt 066000798DOT

Shipping Information

Ship To: [Ship To Address](#) AM Business Unit:

Location:

IN Unit: Capitalize

Freight Terms: FOB DEST Profile ID:

Ship Via: Cost Type:

Charge By: Quantity Ultimate Use Code:

Where Performed:

Distributions Personalize Find | View All 1 of 1 Last

*GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud Ref	PC Bus Unit
STATE									

[Add Comments](#)

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

Header Find | View All First 1 of 1 Last

*Business Unit: DOTM1 [Copy from BU Defaults](#)

Vendor Loc: MAIN

Buyer:

Origin: 915

Currency: USD CRRNT Billing Location: DOTM1ADDR

Payment Terms ID: 000 Tax Exempt 066000798DOT

You will see that your Tax Exempt ID populates. You should copy this information back into the Header Information section.

Note: You will also have to check the Tax Exempt box.

Header

*Business Unit: DOTM1 [Copy from BU Defaults](#)

Vendor Loc: MAIN

Buyer:

Origin: 915

Currency: USD CRRNT

Payment Terms ID: 000

Billing Location: DOTM1ADDR

Tax Exempt 066000798DOT

Header

CT Contract Type: POC Comp

Process Option: Purchase Order

Vendor: [Vendor Search](#)

*Vendor ID: 0000010009 SUBURBAN STATIONERS INC

*Begin Date: 01/14/2013

Expire Date: 01/14/2014

Renewal Date:

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref:

Description: POC For Office Supplies

Master Contract ID:

Tax Exempt 066000798DOT

[Add Comments](#) [Activity Log](#)
[Contract Activities](#) [Document Status](#)
[Primary Contact Info](#) [Thresholds & Notifications](#)
[Contract Releases](#)

Amount Summary

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

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

Header

*Business Unit: DOTM1 [Copy from BU Defaults](#)

Vendor Loc: MAIN

Buyer:

Origin: 915

Currency: USD CRRNT

Payment Terms ID: 000

Billing Location: DOTM1ADDR

Tax Exempt 066000798DOT

If the pay term offered is not included in the list, please contact the Core-CT help desk to log a ticket (860) 622-2300.

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

Shipping Information				
Ship To:	<input type="text"/>	Ship To Address	AM Business Unit:	<input type="text"/>
Location:	<input type="text"/>		<input type="checkbox"/> Capitalize	
IN Unit:	<input type="text"/>		Profile ID:	<input type="text"/>
Freight Terms:	FOB DEST		Cost Type:	<input type="text"/>
Ship Via:	<input type="text"/>		Ultimate Use Code:	<input type="text"/>
Charge By:	Amount		Where Performed:	<input type="text"/>

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

Click

You will return to the Contract Entry Page.

4. Go to **Contract Items**.

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

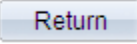
Contract Items																							
Catalog Search		Item Search		Search for Contract Lines																			
<div style="display: flex; justify-content: space-between; align-items: center;"> Lines Personalize Find View All First 1 of 1 Last </div> <div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>UOM</th> <th>Category</th> <th></th> <th>Include for Release</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text"/></td> <td>Copy Paper Blue, </td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> <td><input checked="" type="checkbox"/></td> <td>Active</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> View Category Hierarchy Category Search </div>								Line	Item	Description	UOM	Category		Include for Release	Status	1	<input type="text"/>	Copy Paper Blue,	<input type="text"/>	<input type="text"/>		<input checked="" type="checkbox"/>	Active
Line	Item	Description	UOM	Category		Include for Release	Status																
1	<input type="text"/>	Copy Paper Blue,	<input type="text"/>	<input type="text"/>		<input checked="" type="checkbox"/>	Active																

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

Contract Entry

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

Return

Click  to return back to Contract Entry

Enter the **UOM** - Unit of Measure. This field must be entered.

Contract Items

[Catalog Search](#) [Item Search](#) [Search for Contract Lines](#)

Lines

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

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

[View Category Hierarchy](#) [Category Search](#)

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

The screenshot shows a table with columns: Line, Item, Description, UOM, Category, Include for Release, and Status. The 'Category' column for Line 1 contains the value '44000000' and is highlighted with a red box.

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

The screenshot shows the same table as above, but the 'Line Details' icon (a document with a plus sign) in the 'Item' column for Line 1 is highlighted with a red box.

Contract Entry

Details for Line 1

Contract ID: 05DOT9999AB Version: 1 Vendor: XXXXXXXXXX
 Line: 1 Item ID: [Copy Paper Blue](#)

Line Details

Category: 44000000 ✗
 Description: ✗ Status: Active
 Category ID: 00051 Physical Nature:

Transaction Item Description:

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

- Item Information
- Release Amounts / Quantities
- Pricing Information

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

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

Item Information

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

Release Amounts / Quantities

Minimum Line Amount: <input type="text"/>	Minimum Line Quantity: <input type="text"/>
Maximum Line Amount: <input type="text"/>	Maximum Line Quantity: <input type="text"/>
Total Line Released Amount: 0.000	Total Line Released Quantity: 0.00

Remaining Amount: USD Remaining Quantity: 0.0000 RM
 Remaining Amount %: Remaining Quantity %: 0.00

Pricing Information

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

Schedule Defaults

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

UOM/Pricing						
	Price Loc	UOM	Base Price	Curr		
<input checked="" type="checkbox"/>	MAIN	RM	0.00000	USD	+	-

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

Shipping Template						
	Lead Time	Time Due	*Qty Sched	UOM		
	0	<input type="text"/>	1.0000	RM	+	-

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

Line Details

Category: 44000000 Status: Active
 Description: Physical Nature: Goods
 Category ID: 00051

Transaction Item Description:

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

▼ Pricing Information

Use Contract Base Price

Price Can Be Changed on Order

Price Date: Due Date

Price Qty: Line Quantity

Qty Type: Current Order Quantity

Use Vndr Price UOM Adjustments

Use Vendor Price Shipto Adjust

Adjust: Before Contract Adjustments

Order By Amount

Amount Only

Merchandise Amount:

FOR AN AMOUNT ONLY CONTRACT:

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

Merchandise Amt - enter the amount for the line.

▼ Pricing Information

Use Contract Base Price

Price Can Be Changed on Order

Price Date: Due Date

Price Qty: Line Quantity

Qty Type: Current Order Quantity

Use Vndr Price UOM Adjustments

Use Vendor Price Shipto Adjust

Adjust: Before Contract Adjustments

Order By Amount

Amount Only

Merchandise Amount:

FOR A QUANTITY CONTRACT:

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

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

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

Click .

You will be returned to the Contract Header Page.

Repeat the steps above for each contract line entered.

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

Contract Items

Catalog Search Item Search Search for Contract Lines

Office Equipment and Accessori

Lines

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

Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings [...]

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

View Category Hierarchy Category Search

Fill in the appropriate chartfield information here.

Contract Entry

PO Distributions for Line 1

Contract: 05DOT9999AA Version: 1 Line: 1 blah blah blah office supplies 100.000

Distribution By Business Unit

Business Unit: DOTM1 SpeedChart: [...]

Distribution

Details Asset Information [...]



Dist	Dist Merch	Percent	GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud Ref	PC Bus Unit	Project	Activity
1	100.00	100.0000	STATE											

OK Cancel Refresh

Select  to add additional distribution lines.

Find | View All | First 1 of 1 Last

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

Activity	Source Type	Category	Subcategory	Location	Stat	
						 

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

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

Click  when you are done

You will be taken back to the Contract Page.

Contract
NEW CONTRACT

Contract Entry

Contract

SetID: STATE [Copy From Contract](#)

Contract ID: 05DOT9999AR

***Status:** Open

Administrator/Buyer:

Contract Version

Version: 1 Status: Current

[New Version](#)

Approval Due Date:

Header

CT Contract Type: POC Comp

Process Option: Purchase Order

Vendor: [Vendor Search](#)

*Vendor ID: 0000010009 [SUBURBAN STATIONERS INC](#)

*Begin Date: 01/14/2013

Expire Date: 01/14/2014

Renewal Date:

Currency: USD [CRRNT](#)

Primary Contact:

Vendor Contract Ref:

Description: POC For Office Supplies

Master Contract ID:

Tax Exempt 066000798DOT

[Add Comments](#)

[Contract Activities](#)

[Primary Contact Info](#)

[Contract Releases](#)

[Activity Log](#)

[Document Status](#)

[Thresholds & Notifications](#)

Order Contract Options

Allow Multicurrency PO

Corporate Contract

Lock Chartfields

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

Allow Open Item Reference

Adjust Vendor Pricing First

Price Can Be Changed on Order

Must Use Contract Rate Date Rate Date: 02/14/2013

Auto Default

*Dispatch Method: Print Dispatch

[Price Adjustment Template](#)

Contract Items

[Catalog Search](#) [Item Search](#) [Search for Contract Lines](#)

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

[View Category Hierarchy](#) [Category Search](#)

Amount Summary

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

Contract Categories

Line	Category	Description	Status
1	<input type="text"/>	<input type="text"/>	Active

Contract Categories

Line	Category	Description	Status
1	<input type="text"/>	<input type="text"/>	Active

[Save](#) [Notify](#) [Refresh](#)

[Add](#) [Update/Display](#)

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

Click [Save](#) to save the contract.

Updated 01/03/13