

Adding a Contract to a PO Line

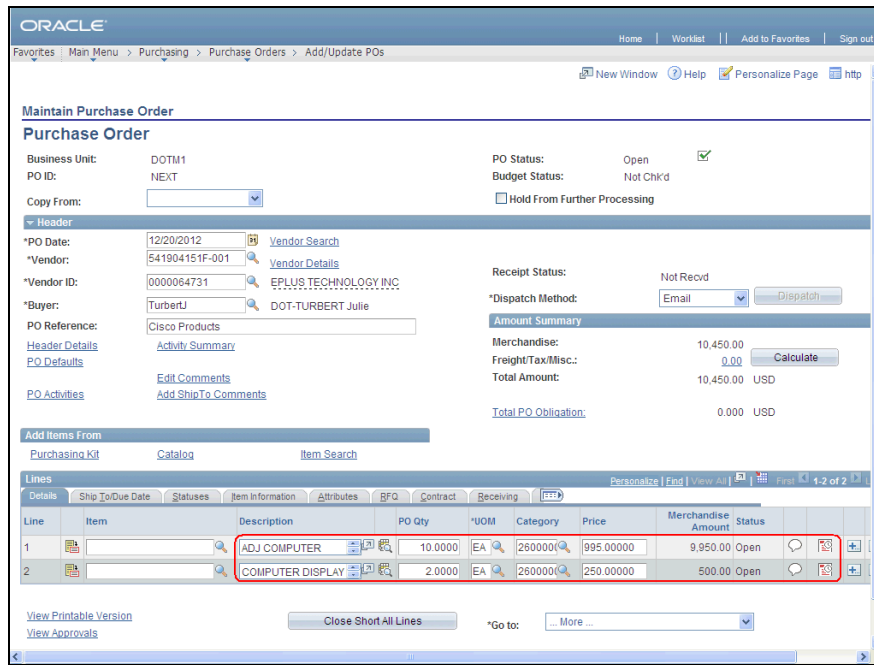


Core-CT 9.1 has two options for associating a **Contract ID** to a line on a purchase order. The buyer can use the **Contract Lookup** to select the desired ID from a list of those available contracts the state has with the vendor. Alternately they can use the new **Contract Search** icon to look up the contract details before adding it to the line.

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

Procedure

Navigation: Purchasing > Purchase Orders > Add/Update POs



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

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Maintain Purchase Order

Purchase Order

Business Unit: DOTM1
 PO ID: NEXT
 PO Status: Open
 Budget Status: Not Chkd
 Copy From:
 Hold From Further Processing

Header

*PO Date: 12/20/2012 [Vendor Search](#)
 *Vendor: 541904151F-001 [Vendor Details](#)
 *Vendor ID: 0000064731 EPLUS TECHNOLOGY INC
 *Buyer: TurbertJ DOT-TURBERT Julie
 PO Reference: Cisco Products

Receipt Status: Not Recvd
 *Dispatch Method: Email

Amount Summary

Merchandise: 10,450.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 10,450.00 USD
 Total PO Obligation: 0.000 USD

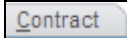

Add Items From

Purchasing Kit | Catalog | Item Search

Lines

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1		ADJ COMPUTER	10.0000	EA	260000	995.00000	9,950.00	Open
2		COMPUTER DISPLAY	2.0000	EA	260000	250.00000	500.00	Open

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Step	Action
2.	Click the Contract tab to view the contract data fields for both lines. 
3.	Click the Look up Contract ID button for line 1. 

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Purchase Order

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1		ADJ COMPUTER	10.0000	EA	260000	995.00000	9,950.00	Open
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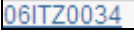

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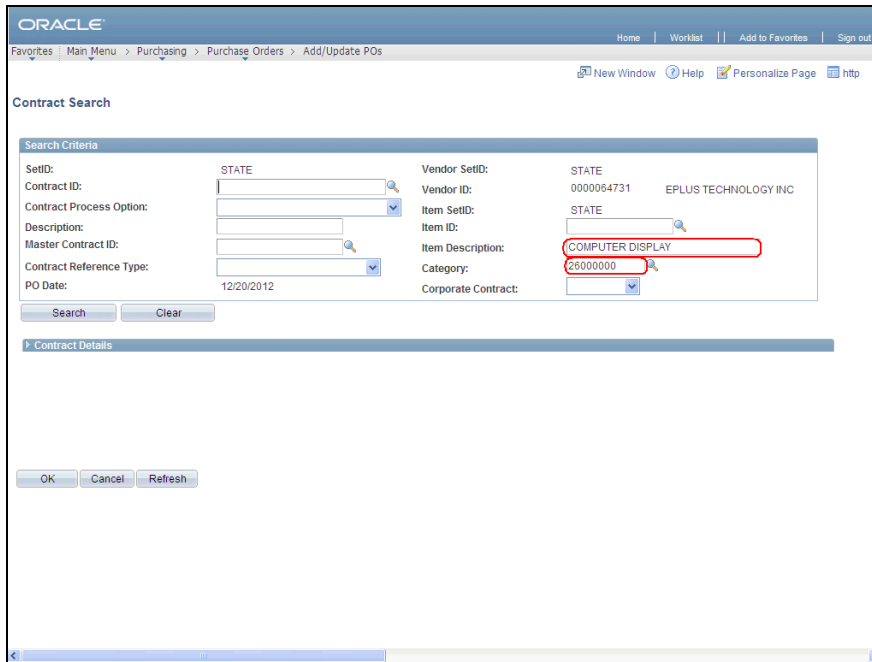
Look Up Contract ID

SetID: STATE
 Contract ID: begins with
 Short Vendor Name: begins with
 Description: begins with

Search Results

Vendor Set ID	Vendor ID	Contract ID	Short Vendor Name	Contract Status	Description	Contract Beginning Date	Contract Expire Date
STATE	0000064731	12PSX0239AA	541904151F-001	Approved	DASM1 0000000995	10/09/2012	10/10/2016
STATE	0000064731	11BA42272	541904151F-001	Approved	Cisco Phone Support Services	05/10/2011	05/09/2016
STATE	0000064731	10ITZ0142AA	541904151F-001	Approved	DOCM1 0000048953	01/11/2011	01/10/2012
STATE	0000064731	10ITZ0085AC	541904151F-001	Approved	ITDM1 0000001489	08/19/2010	09/16/2011
STATE	0000064731	10ITZ0021AA	541904151F-001	Approved	DEPM1 0000024347	04/14/2010	10/13/2010
STATE	0000064731	10ITZ0012AA	541904151F-001	Approved	ITDM1 0000001182	04/30/2010	04/29/2012
STATE	0000064731	09ITZ0091AA	541904151F-001	Approved	DPSM1 0000000152	04/12/2010	07/12/2010
STATE	0000064731	09ITZ0089AA	541904151F-001	Approved	DPSM1 0000000144	02/23/2010	05/27/2010
STATE	0000064731	09ITZ0087AA	541904151F-001	Approved	ITDM1 0000000864	10/23/2009	10/22/2011
STATE	0000064731	08ITZ0095AA	541904151F-001	Approved	ITDM1 0000000336	05/22/2009	05/21/2012
STATE	0000064731	08ITZ0093A	541904151F-001	Approved	Cisco Products	05/22/2008	05/20/2012
STATE	0000064731	05ITZ0107	541904151F-001	Approved	VMWare Software	01/05/2008	01/04/2008
STATE	0000064731	05ITZ0105	541904151F-001	Approved	Clara Infrastructure XPe License	01/18/2008	03/03/2008
STATE	0000064731	05ITZ0100	541904151F-001	Approved	UPS Storage Systems & Mgmt	12/21/2005	05/20/2006
STATE	0000064731	05ITZ0092	541904151F-001	Approved	Gateway M680xb Laptops	11/22/2005	05/22/2006
STATE	0000064731	04ITZ0010MA	541904151F-001	Approved	MA B-04-010	01/02/2006	12/31/2008
STATE	0000064731	03ITZ0417	541904151F-001	Approved	Cisco Routers and Services	05/18/2004	05/17/2008

Step	Action
4.	All the Approved contracts for this vendor are listed, even those that are expired. Click the 06ITZ0034 link. 
5.	The alternative method for adding a contract to a line is to click the Contract Search button. 



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Contract Search

Search Criteria

SetID: STATE

Contract ID:

Contract Process Option:

Description:

Master Contract ID:

Contract Reference Type:

PO Date: 12/20/2012

Vendor SetID: STATE

Vendor ID: 0000064731 EPLUS TECHNOLOGY INC

Item SetID: STATE

Item ID:

Item Description: **COMPUTER DISPLAY**

Category: **26000000**

Corporate Contract:

Search Clear

Contract Details

OK Cancel Refresh

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

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Contract Search

Search Criteria

SetID:	STATE	Vendor SetID:	STATE
Contract ID:	<input type="text"/>	Vendor ID:	0000064731 EPLUS TECHNOLOGY INC
Contract Process Option:	<input type="text"/>	Item SetID:	STATE
Description:	<input type="text"/>	Item ID:	<input type="text"/>
Master Contract ID:	<input type="text"/>	Item Description:	COMPUTER DISPLAY
Contract Reference Type:	<input type="text"/>	Category:	26000000
PO Date:	12/20/2012	Corporate Contract:	<input type="text"/>

Search Clear

Contract Details

OK Cancel Refresh

Step	Action
7.	Click the Clear button to clear all the fields. <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 10px; margin-top: 5px;">Clear</div>

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Contract Search

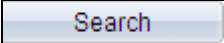
Search Criteria

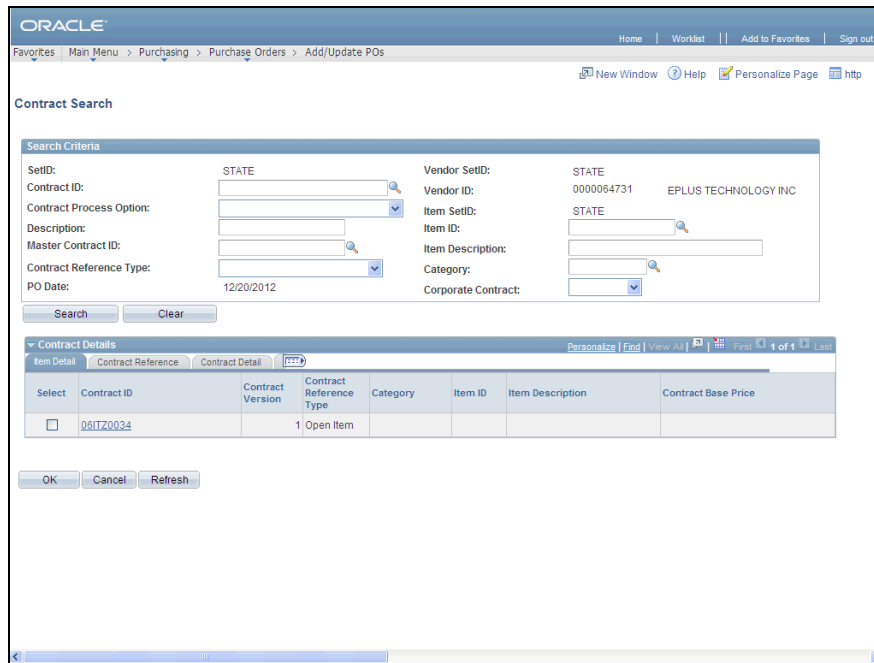
SetID:	STATE	Vendor SetID:	STATE
Contract ID:	<input type="text"/>	Vendor ID:	0000064731 EPLUS TECHNOLOGY INC
Contract Process Option:	<input type="text"/>	Item SetID:	STATE
Description:	<input type="text"/>	Item ID:	<input type="text"/>
Master Contract ID:	<input type="text"/>	Item Description:	<input type="text"/>
Contract Reference Type:	<input type="text"/>	Category:	<input type="text"/>
PO Date:	12/20/2012	Corporate Contract:	<input type="text"/>

Search Clear

Contract Details

OK Cancel Refresh

Step	Action
8.	Click the Search button. 

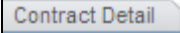
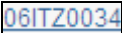


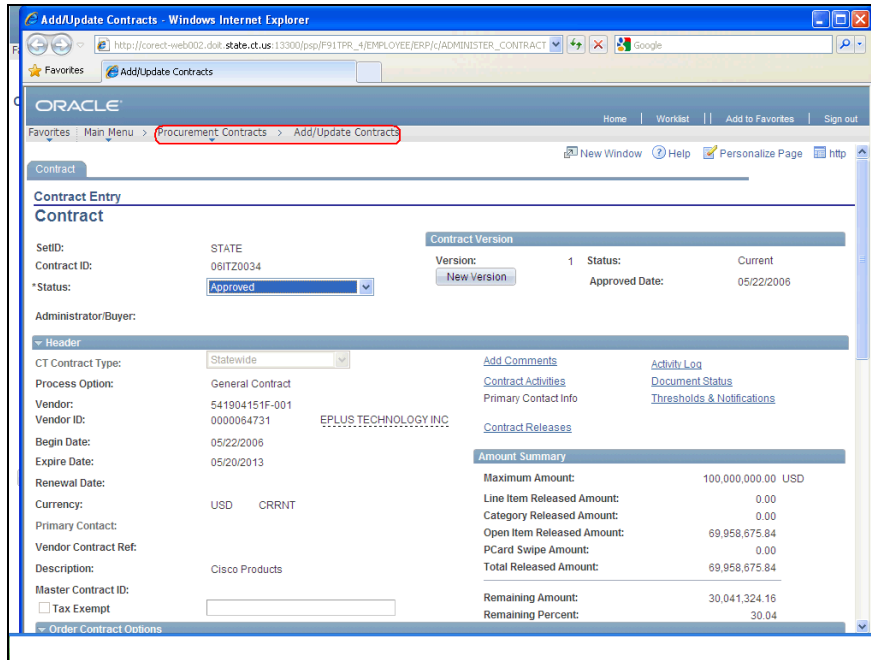
The screenshot shows the Oracle Contract Search interface. The search criteria are as follows:

Field	Value
SetID:	STATE
Contract ID:	
Contract Process Option:	
Description:	
Master Contract ID:	
Contract Reference Type:	
PO Date:	12/20/2012
Vendor SetID:	STATE
Vendor ID:	0000064731 EPLUS TECHNOLOGY INC
Item SetID:	STATE
Item ID:	
Item Description:	
Category:	
Corporate Contract:	

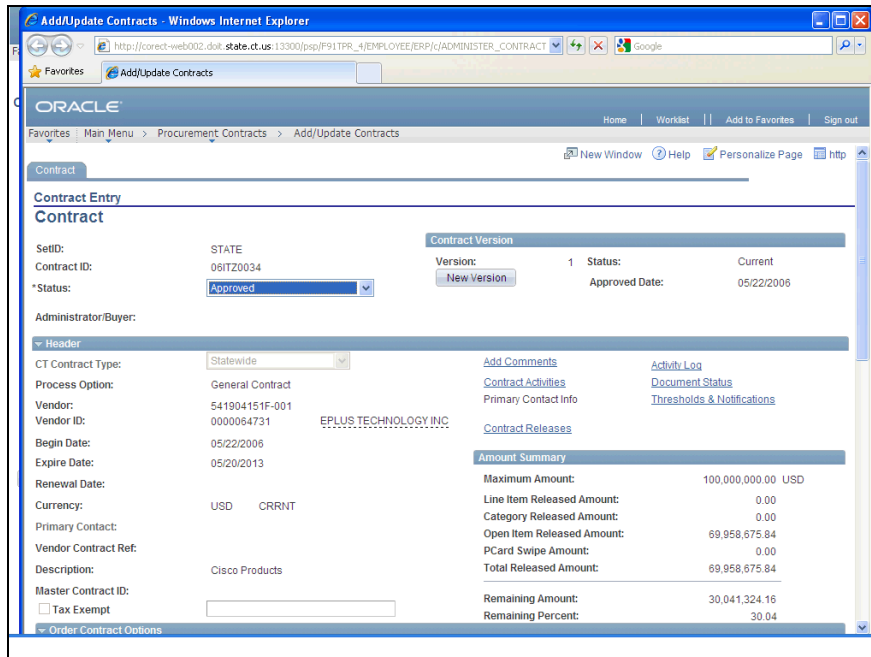
The search results table is as follows:


Select	Contract ID	Contract Version	Contract Reference Type	Category	Item ID	Item Description	Contract Base Price
<input type="checkbox"/>	06ITZ0034		1 Open Item				

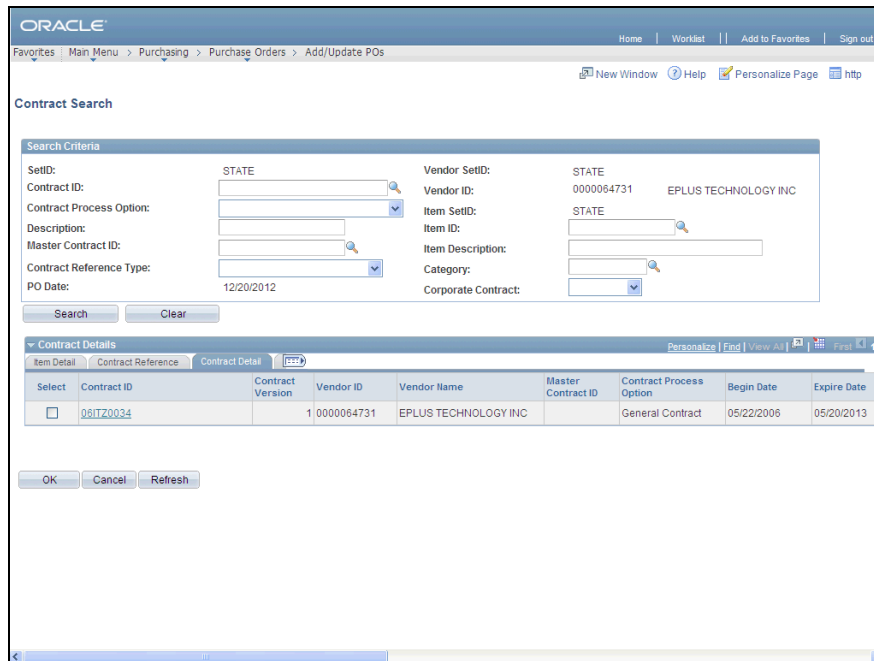
Step	Action
9.	The search will return only the active contracts for this vendor. Click the Contract Detail tab to review more information. 
10.	The Contract Detail tab displays the basic details for the contracts listed. Click the 06ITZ0034 link to review the full contract. 



Step	Action
11.	The link opens the Add/Update Contracts component of Procurement Contracts in a new window.



Step	Action
12.	Click the Close button after completing the review. 



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Contract Search

Search Criteria

SetID: STATE Vendor SetID: STATE
Contract ID: [] Vendor ID: 0000064731 EPLUS TECHNOLOGY INC
Contract Process Option: [] Item SetID: STATE
Description: [] Item ID: []
Master Contract ID: [] Item Description: []
Contract Reference Type: [] Category: []
PO Date: 12/20/2012 Corporate Contract: []

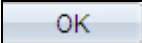
Search Clear

Contract Details

Item Detail | Contract Reference | Contract Detail

Select	Contract ID	Contract Version	Vendor ID	Vendor Name	Master Contract ID	Contract Process Option	Begin Date	Expire Date
<input type="checkbox"/>	06ITZ0034		1 0000064731	EPLUS TECHNOLOGY INC		General Contract	05/22/2006	05/20/2013

OK Cancel Refresh

Step	Action
13.	Click the Select option to add the contract to the line item. <input type="checkbox"/>
14.	Click the OK button. 

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Purchase Order

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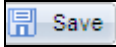
Add Items From

[Purchasing Kit](#) [Catalog](#) [Item Search](#)

Lines

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Ca Lir
1	<input type="text"/>	ADJ COMPUTER	STATE	06IT20034	1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	COMPUTER DISPLAY	STATE	06IT20034	1	<input type="text"/>	<input type="text"/>

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Step	Action
15.	Click the scrollbar.
16.	Click the Save button. 
17.	End of Procedure.