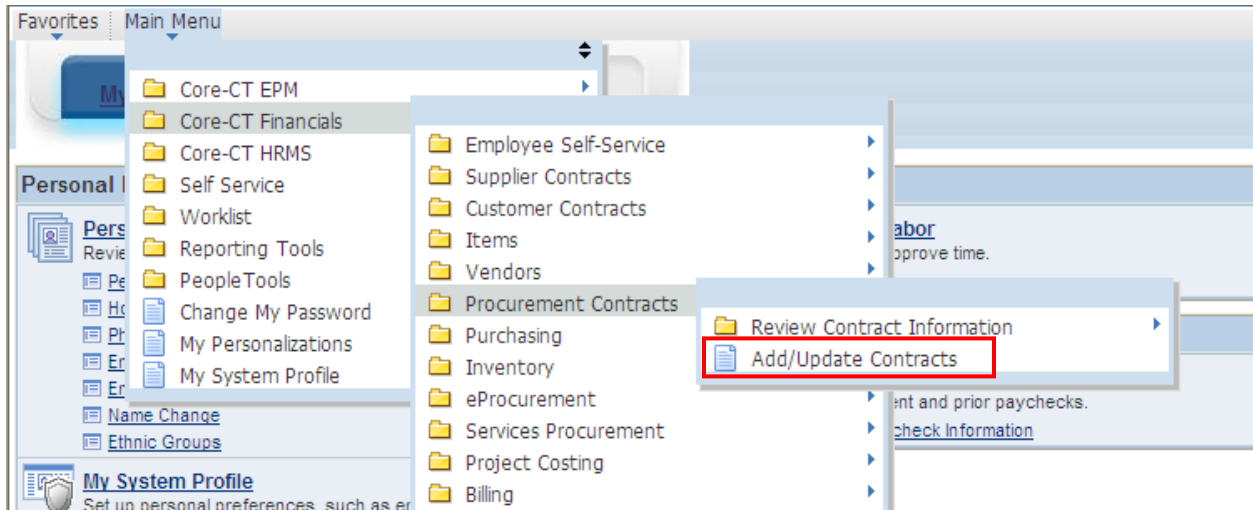


Contracts

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.

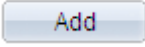
Manually enter the contract number in the Contract ID field using the Core-CT numbering schema: two numbers to represent the calendar year, three characters to represent the Agency, four sequential numbers to represent the contract number, and two alphas to represent the vendor.

- 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.

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


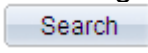
General Contract
Prepaid Voucher
Prepaid Voucher w/ Advance PO
Purchase Order
Recurring PO Voucher
Recurring Voucher
Release to Single PO Only

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).





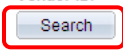
This will open a new screen where you can search for an existing contract by Contract ID, Vendor, or Vendor ID. Use the search icon  to look for existing values. Once you have found the contract you are looking for, click .


Contract Entry


Copy Contract

SetID: STATE
Contract ID: 05DOT9999AA




Contract Search

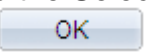
Contract ID:  Master Contract ID: 
Vendor:  Allow Open Item Reference
Vendor ID: 


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 Entry

Contract

SetID: STATE
 Contract ID: 05DOT9999AA
 * Status: Open
 Administrator/Buyer: [Search Icon]

Contract Version
 Version: 1 Status: Current
 Approval Due Date: [Date Picker]

+ Header

CT Contract Type: [Dropdown] [Add Comments](#) [Activity Log](#)
 Process Option: Purchase Order [Contract Activities](#) [Document Status](#)
 Vendor: [Search Icon] [Vendor Search](#) [Primary Contact Info](#) [Thresholds & Notifications](#)
 * Vendor ID: 0000010009 SUBURBAN STATIONERS INC [Contract Releases](#)
 * Begin Date: 01/11/2013 [Date Picker]
 Expire Date: 01/10/2014 [Date Picker]
 Renewal Date: [Date Picker]
 Currency: USD [Search Icon] CRRNT [Search Icon]
 Primary Contact: [Search Icon]
 Vendor Contract Ref: [Text Field]
 Description: [Text Field]
 Master Contract ID: [Text Field] [Search Icon]
 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 | |
| Remaining Amount: | 100,000.00 | |
| Remaining Percent: | 100.00 | |

- Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 01/14/2013 [Date Picker]
 Corporate Contract Adjust Vendor Pricing First Auto Default
 Lock Chartfields Price Can Be Changed on Order *Dispatch Method: Print [Dropdown] [Search Icon]
[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: **POC Comp**

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 Allow Open Item Reference Must Use Contract Rate Date Rate Date: 01/11/2013

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order

*Dispatch Method: [Print](#) [Dispatch](#)

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 Allow Open Item Reference Must Use Contract Rate Date Rate Date: 01/11/2013

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order

*Dispatch Method: [Print](#) [Dispatch](#)

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 | 060730629F-001 | SUBURBAN SANITATION SERVICE INC | N |
| <input type="checkbox"/> | 0000010291 | 2 | 060730629F-001 | SUBURBAN SANITATION SERVICE INC | N |
| <input type="checkbox"/> | 0000010291 | 3 | 060730629F-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 |
| | |

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

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

| 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 **OK** 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
 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
 Dispatch

[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 ContractID: 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

| | | | |
|--|---|---|---|
| <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"/> |
| <input checked="" type="checkbox"/> 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: 05DOT999AA 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](#)

OK Cancel Refresh

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 | | Find View All First 1 of 1 Last |
|--|--------------|---------------------------------------|
| *Business Unit: | DOTM1 | Copy from BU Defaults |
| Vendor Loc: | MAIN | |
| Buyer: | | |
| Origin: | 915 | |
| Currency: | USD CRRNT | |
| Payment Terms ID: | 000 | |
| Billing Location: | DOTM1ADDR | |
| <input checked="" type="checkbox"/> Tax Exempt | 066000798DOT | |

| Header | | Amount Summary |
|--|------------------------------------|---------------------------------|
| CT Contract Type: | POC Comp | Maximum Amount: 100,000.00 USD |
| Process Option: | Purchase Order | Line Item Released Amount: 0.00 |
| Vendor: | Vendor Search | Category Released Amount: 0.00 |
| *Vendor ID: | 0000010009 SUBURBAN STATIONERS INC | Open Item Released Amount: 0.00 |
| *Begin Date: | 01/14/2013 | PCard Swipe Amount: 0.00 |
| Expire Date: | 01/14/2014 | Total Released Amount: 0.00 |
| Renewal Date: | | |
| Currency: | USD CRRNT | |
| Primary Contact: | | |
| Vendor Contract Ref: | | |
| Description: | POC For Office Supplies | |
| Master Contract ID: | | |
| <input checked="" type="checkbox"/> Tax Exempt | 066000798DOT | |

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 | | Find View All First 1 of 1 Last |
|--|--------------|---------------------------------------|
| *Business Unit: | DOTM1 | Copy from BU Defaults |
| Vendor Loc: | MAIN | |
| Buyer: | | |
| Origin: | 915 | |
| Currency: | USD CRRNT | |
| Payment Terms ID: | 000 | |
| Billing Location: | DOTM1ADDR | |
| <input checked="" type="checkbox"/> 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 | | | |
| 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 | <input type="text"/> |

(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 [Return](#) 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

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

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.**



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



Contract Entry

Details for Line 1

Contract ID: 05DOT9999AB Version: 1 Vendor: ████████████████████
 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.

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 | | | | | | Personalize | Find | View All | First | 1 of 1 | Last |
|-------------------------------------|-----------|-----|------------|------|--|-------------|------|----------|-------|--------|------|
| | Price Loc | UOM | Base Price | Curr | | | | | | | |
| <input checked="" type="checkbox"/> | MAIN | RM | 9.99 | USD | | | | | | | |

Click .

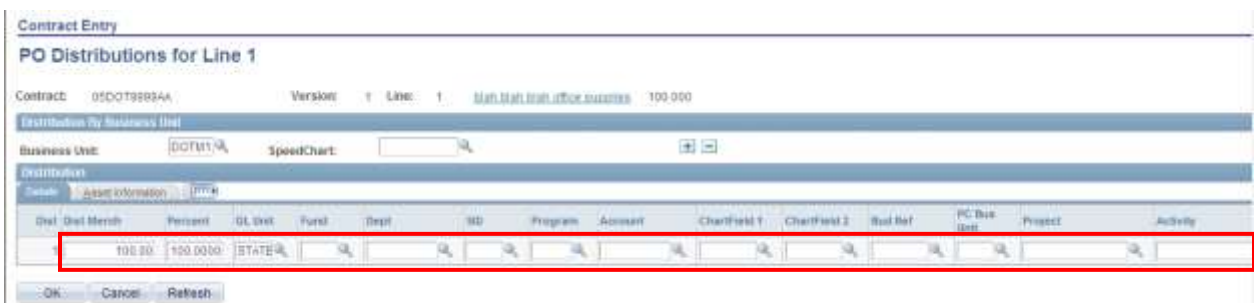
You will be returned to the Contract Header Page.

Repeat the steps above for each contract line entered.

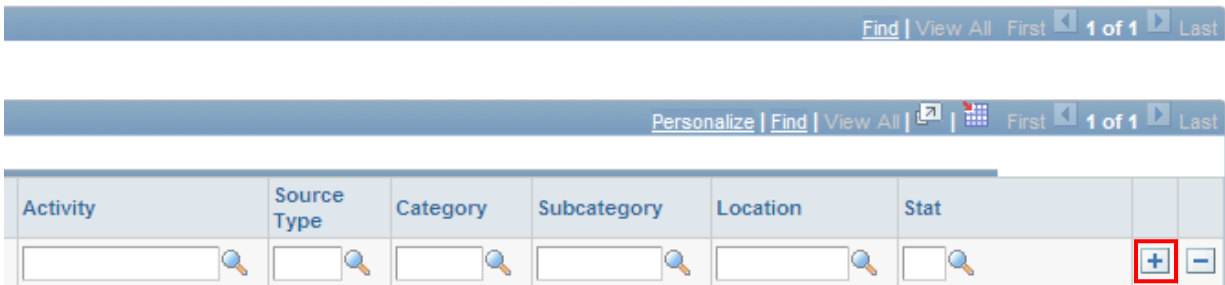
Click on the **PO Distributions Details** icon.



Fill in the appropriate chartfield information here.



Select to add additional distribution lines.



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 Entry
Contract

SetID: STATE [Copy From Contract](#)

Contract ID: 05DOT99994R

*Status: **Open**

Administrator/Buyer:

Contract Version

Version: 1 Status: Current

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 065000798DOT

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 | |

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 02/14/2013

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order

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

*Dispatch Method: [Print](#) [Approval](#)

Contract Items

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

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

Contract Categories

| Line | Category | Description | Status |
|------|----------|-------------|--------|
| 1 | | | 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