

# Participant Guide – PO325: Entering Supplier Contracts

State of Kansas





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### **Course Overview**

#### **Course Objectives**

Upon completion of the course, you will be able to:

- Define basic Supplier Contract Entry terms and concepts
- Explain how Supplier Contract Entry fits into the end-to-end process for Purchasing
- Enter transactional Supplier Contracts into SMART
- Explain the business processes associated with transactional Supplier Contracts in the State of Kansas

#### Agenda

Today, we will cover the following topics:

- Supplier Contract Entry key terms, concepts and business processes
- Roles involved in Supplier Contract Entry
- The creation of new and copying of existing transactional supplier contracts in SMART

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### Lesson 1: Understanding Supplier Contracts

#### Objectives

Upon completion of this lesson, you will be able to:

- Define basic Supplier Contract key terms and concepts
- Describe how Supplier Contracts fit into the end-to-end process for Purchasing
- List the roles involved in Supplier Contract Entry and describe the tasks performed by each role



### Key Terms

- **Supplier Contracts**: A binding agreement between the State of Kansas and a vendor created from the Supplier Contract module. Contracts may be added online or may originate from Strategic Sourcing (bid) events. Supplier Contracts are integrated to the purchasing module for purchase order creation.
- Attachment: Supplemental information related to a document or transaction

#### **Topic 1: Transactional Supplier Contract Key Concepts**

• **Transactional Contract:** The transactional contract data is entered in SMART using the Contract Entry page.

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### **Topic 2: Supplier Contract Entry Process**

• *Figure 1* shows how Supplier Contracts fit within the end-to-end processes for Purchasing:

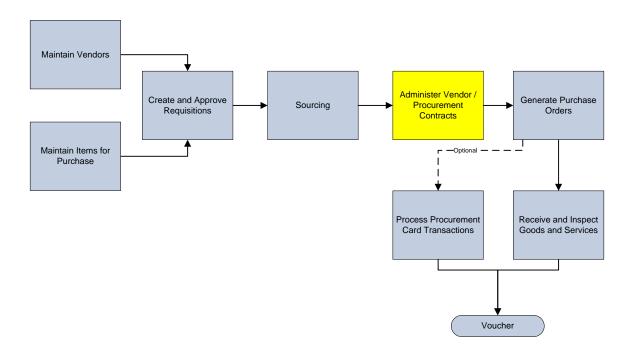


Figure 1. Supplier Contract Entry Process within the End-to-end Purchasing Process

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### **Topic 3: Roles Involved in Supplier Contract Entry**

• Roles and tasks that interact with Supplier Contract Entry within SMART:

SMART User Role	Key Activities per Role – Supplier Contract Entry
Central Purchasing Administrator	Maintains the setup tables related to Purchasing, excluding the Items Table Master
Agency Contract Processor	Enters transactional contract data
Central Contract Processor	Enters transactional contract data, creates contract documents, sets up collaborations, and performs contract maintenance

Table 1. Supplier Contract Roles and Tasks

#### Lesson Review

In this lesson, you learned:

- Supplier Contract Entry key terms and concepts
- How Supplier Contracts fit within the end-to-end processes for Purchasing
- The roles and tasks that interact with Supplier Contract Entry within SMART



### Additional Resources

The following are additional resources that provide more detail about the topic we have covered:

- SMART Website Purchasing Supplier Contract Entry materials
- State of Kansas Division of Purchases website http://www.da.ks.gov/purch/





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### Lesson 2: Supplier Contract Entry

### Objectives

Upon completion of this lesson, you will be able to:

- Define supplier contract transactional information
- Create a transactional supplier contract in SMART
- Create a new transactional supplier contract by copying an existing transactional supplier contract in SMART

### **Topic 1: Define Transactional Supplier Contract Information**

• **Contract Pages**: Use the Contract Entry pages to enter header and line information for transactional procurement contracts.

#### State of Kansas - Types of Supplier Contracts

- **Open Ended**: Purchase as many as you want no cap. No financial limitations.
- **Fixed Cost**: Flat rate fee. Purchasing 10 items = \$xx.xx, or purchase services for this project = \$xx.xx
- Not To Exceed: Capped cost contract. Not to exceed total dollar or quantity amount specified in the contract.

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### **Topic 2: Create Transactional Supplier Contract**



### Walkthrough/Activity

We will now complete Activity 1 - Walkthrough: Review Supplier Contract Transactional Data in your Activity Guide.

Page Name	Navigation
Contract Entry – Add a New	Supplier Contracts $\rightarrow$ Create Contracts and
Value	Documents → Contract Entry

Contract Entry		
Eind an Existing Value Add a New Value		
SetID:	SOKID Q	
Contract ID:	NEXT	
Contract Process Option:	General Contract	~
Add	General Contract Prepaid Voucher Prepaid Voucher w/ Advance PO	
Find an Existing Value   Ad	Purchase Order Recurring PO Voucher Recurring Voucher Release to Single PO Only	

Figure 2. Contract Entry: Contract Process Option

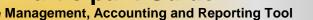




Fields	Description
SetID	Default value is 'SOKID'
Contract ID	The Contract ID number is referenced on the purchase order at the line level on the Contract tab page, using the Contract ID field.
	<i>Please do not change the default value of 'NEXT'</i> . It is State of Kansas best business practive to accept the 'NEXT' default value.
	When you save the Supplier Contract, SMART auto assigns the next available contract number to the supplier contract.
Contract Process Option	You must choose the option of 'Purchase Order'. If you do not choose the 'Purchase Order' option, you will NOT be able to reference the Contract ID number on the purchase order when it is created.
	Once the Contract has been saved, you will not be able to change the Contract Process Option, so ensure that you've chosen the Purchase Order option <b>before</b> saving the contract in SMART.

Table 2. Contract Entry Page





### KANSAS

**Transactional Contract Page** 

Contract						
SetID:	SOKID	Copy From Contract	*Status:	Open	~	
Contract ID:	NEXT					
Administrator:		Q				Add a Document

#### Figure 3. Transactional Contract Page - top section

Fields	Description
SetID	Default value is 'SOKID'
Copy From Contract link	This link enables you to copy from an existing transactional contract in SMART. The use of this link will be covered later in this course.

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Fields	Description
Status	Auto defaults as 'Open' status.
	Agencies: If the contract does NOT
	require Division of Purchases'
	approval, change the status from
	'Open' to 'Approved' before saving the
	contract. If the contract does require
	Division of Purchases' approval, leave
	the status in 'Open'. If approved,
	Division of Purchases will change the
	status to 'Approved'.
	• It is important to know that, once a
	contract has been saved, it cannot
	be changed or edited at an Agency
	level. If changes need to be made to
	a saved contract, contact the Central
	Division of Purchases.
	• <b>'Approved'</b> indicates the contract is
	available to be used on a Requisition
	and Purchase Order.
	'Closed' indicates the contract has
	been closed by the Central Division of
	Purchases.
	'On-Hold' indicates the Central
	Division of Purchases has placed the contract on hold.
	contract on hold.
Participant Notes:	



Fields	Description
Contract ID	Auto defaults as 'NEXT'. The next Contract ID number is auto generated, assigned, and displayed when the transactional contract is saved (using the Save button). All contracts will be auto- numbered in SMART.
Administrator	Click the Look-Up icon to view the Look Up Administrator search page. Enter or select the name of the Buyer who is the Contract Administrator for the transactional contract. Most often this will be yourself, however there may be occasions when you are entering the contract on behalf of someone else. The Contract Administrator must be assigned a Buyer role in SMART for their name to appear in the list of available options for the Administrator field.
Add a Document button	This button is not used by Agency staff, it is used by Central Division of Purchases staff to create contract documents within the SMART document management system.

Table 3. Transactional Contract – Contract Page

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#### **Header Information**

✓ Header			
Process Option: Vendor: *Vendor ID:	Purchase Order       Q     Vendor Search	Add Comments Contract Activities Primary Contact Info Contract Agreement	<u>Activity Log</u> <u>Document Status</u> <u>Thresholds &amp; Notifications</u>
*Begin Date:	12/21/2009	Amount Summary	
Expire Date:	31	Maximum Amount:	0.00 USD
Currency:		Line Released:	0.00
Primary Contact:	Q	Open Item Relsd:	0.00
Vendor Contract Ref:		Total Released Amount:	0.00
Description:			0.00
Master Contract ID:	Q		

Figure 4. Transactional Contract Page – Header Section

Fields	Description
Process Option	'Purchase Order' <b>MUST</b> be the option selected.
Vendor	Use the Vendor Look-up button to access the Look Up Vendor page, or enter the Vendor name into the Vendor field.
Vendor Search link	Use the Vendor Search link to access and use the Vendor Search page to locate existing vendors in SMART.
Vendor ID	'Use the Vendor ID Look-up button to access the Look Up Vendor ID page, or enter the Vendor ID into the Vendor ID field.



Fields	Description
Begin Date	If the supplier contract is a result of a
	purchase requisition such as a Prior
	Authorization requisition, then the Begin
	Date MUST be equal to or prior to the
	date the purchase requisition was created
	in SMART. This does NOT represent the
	actual contract start date.
Expire Date	The Expire Date field represents the
	current expiration date of the contract.
	<b>Note</b> : This date may be edited in the future if the expiration date changes. For
	example a contract is set to expire, and it
	is renewed.
Currency	Auto defaults – please do not change this
Canonay	information.
Primary Contact	Name of the primary contact at the
	vendor for the contract. (Sourced from the
	vendor file in SMART. This contact
	information is maintained by Central).
Vendor Contract Ref	May be used to reference a Vendor
	Contract number or other type of
	reference number.
Description	30 character field. Use this field to enter
	a description for the transactional
	contract. <b>Note</b> : You should use a naming
	convention that is easily identified. The Description value entered in this field
	appears in the contract information that is
	posted on the Division of Purchases
	website.
Tax Exempt	Optional entry field. Use this field to enter
	the Agency Tax Exemption number if
	desired.

Table 4. Transactional Contract Page – Header Section

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#### **Contract Term/Renewals**

✓ Header			
Process Option: Vendor: *Vendor ID:	Vendor Search	Add Comments Contract Activities Primary Contact Info Contract Agreement Amount Summary	Activity Log Document Status Thresholds & Notifications
*Begin Date: Expire Date: Currency: Primary Contact: Vendor Contract Ref: Description: Master Contract ID: Tax Exempt	03/25/2009 USD CRRNT C CRRNT C	Maximum Amount: Line Released: Open Item Relsd: Total Released Amount:	0.00 USD 0.00 0.00 0.00
	rals rt Date (mm/dd/yyyy): 10/19/2009 🛐 ration Date (mm/dd/yyyy): 10/18/2011 🛐 Ex: 0 = Equals initial contract ter	Number of Renewals Established Renewal Duration (in months) Current Renewal Period rm, 1 = Equals first renewal	

Figure 5. Transactional Contract Page – Contract Term/Renewals Section

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Fields	Description
Actual Contract Start Date (mm/dd/yyyy)	Click the Calendar button to access the calendar and select the actual start date, or enter the actual start date for the contract. This date represents the contract start date. Once entered, this date should not change. <b>Note</b> : When creating a new contract, SMART auto defaults the current date in this field, therefore you need to edit the default date if applicable.
Initial Contract Expiration Date (mm/dd/yyyy)	Enter the first expiration date for the contract. <b>Note</b> : This field represents the initial (first) expiration date for the contract. Despite contract renewals, this field's date entry will never change, it will always remain the same.
Number of Renewals Established	Enter the number of contract renewals established for the contract with the vendor.
Renewal Duration (in months)	Enter the number of months (duration) for the new contract renewal period.
Current Renewal Period	If the contract contains renewal options, change the <b>Current Renewal Period</b> field in the Contract Term/Renewals section upon each renewal period. SMART does not calculate this field. This field is a manual data entry field.





Fields	Description
Ex: 0 = Equals initial contract term, 1 = Equals first renewal	Use this helpful example to calculate and enter the correct values within the Contract Term/Renewals section on the Contract Entry page. The initial contract will show "0" in the Current Renewal Period field. When the contract is renewed the first time, this field value should be changed to "1". When renewed the second time, the field value should be changed to "2", and so on.

Table 5. Transactional Contract Page – Contract Term/Renewals Section

#### **Order Contract Options**

Order Contract Options				
Allow Multicurrency PO	Allow Open Item Reference	Must Use Co	ntract Rate Date	
Corporate Contract	Adjust Vendor Pricing First	Rate Date:	12/21/2009	
Lock Chartfields	Price Can Be Changed on Order			
PO Defaults	PO Open Item Pricing			

Figure 6. Transactional Contract Page – Order Contract Options

Fields	Description
Allow Multicurrency PO	Defaults as selected. Please do not
	change this default setting.



Fields	Description
Corporate Contract	The Corporate Contract Checkbox defaults as checked (selected). The Corporate Contract Checkbox (when selected) enables ALL agencies to have access to a contract in SMART. The Corporate Contract Checkbox is to be selected (checked) only by Central Division of Purchases staff for contracts available to all agencies. <u>Agencies: Please deselect (uncheck)</u> the Corporate Contract Checkbox when creating contracts for your agency. If you do not deselect the Corporate Contract Checkbox, ALL other agencies will have access to your contracts and will be able to issue purchase orders against them.
Lock Chartfields	The State of Kansas is not using this functionality. Do not select this checkbox.



Fields	Description
Allow Open Item Reference	Select this checkbox to add any item, add any number of items, or to add no line items to the contract.
	<b>For example</b> : This check box would be used especially for catalog type contracts where a specific line item is not defined.
	If this checkbox is not selected when creating the contract, the contract ID number will NOT be able to be referenced on a requisition or a purchase order, unless the specific contract line item is used on the requisition or the purchase order.
	For example: Your agency wants to create requisitions or purchase orders which reference the contract ID. If you do NOT select the 'Allow Open Item Reference checkbox', your agency will be limited to only the specific line items which are listed on the contract in SMART. Agencies must ALWAYS select the Allow Open Item Reference checkbox when creating a supplier contract.
	<b>Note</b> : The use of this checkbox is related to the use of the 'Price Can Be Changed on Order' checkbox.
Adjust Vendor Pricing First	The State of Kansas is not using this functionality. Please do not select this checkbox.

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Fields	Description
Price Can Be Changed on Order	Select this checkbox, if you want to be able to change the SMART system calculated prices on purchase orders for this contract.
	<i>This field setting applies only to open items that are referenced on a purchase order when the "Allow Open Item Reference" checkbox is selected.</i>
	If you do not select this checkbox, the price fields on the purchase order are unavailable for entry or editing.
Must Use Contract Rate Date	<i>The State of Kansas is not using this checkbox</i> (as it relates to multicurrency's). Please do not select this checkbox.
Rate Date	SMART auto defaults this value (This is the date the transactional contract is created in SMART and it relates to multicurrency's).

Table 6. Transactional Contract Page – Order Contract Options

### **PO Defaults Link**

	t Options				
Allow Multic	urrency PO	Allow Open Item Reference	Must Use Co	ontract Rate Date	
Corporate C	ontract	Adjust Vendor Pricing First	Rate Date:	12/21/2009	
Lock Chartf	ields	Price Can Be Changed on Order			
PO Defaults		PO Open Item Pricing			

Figure 7. Transactional Contract Page – Order Contract Options: PO Defaults Link

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Clicking the PO Defaults link opens the PO Defaults page:

Contract Entry				
PO Defaults				
SetID: SOKID Co	ntract ID: NEXT	Vendor ID:		
Header				
*Business Unit:	17300 Q	Copy from BU Default		€ E
Vendor Loc:	Q			
Buyer:	Q			
Origin:				
Currency:		Billing Location:	BA17300	
Payment Terms ID: Shipping Information			Kokouzzitot	
Ship To:	Q Ship To Address	AM Business Unit:	Q	
Location:	٩		Capitalize	
IN Unit:		Profile ID:	٩	
Freight Terms:	FOBDESTALL	Cost Type:	Q	
Ship Via:	Quantity	Ultimate Use Code:	Q •	
Charge By:		Where Performed: C Bus		Source
*GL Unit Dept	Fund Bud Unit Program Account U	nit	Activity	Type Category Subcategory
17300 🔍		Q	Q	
Add Comments				
OK Cancel	Refresh			

Figure 8. PO Defaults page

- The **PO Defaults page** is used to create a contract for multiple agencies. This is NOT used to create a statewide contract. Using the **PO Defaults page** allows you to add lines for specific business units (agencies) to use the contract.
- The Business Unit number defaults, however you MUST select a Buyer. For agency specific contracts issued by the Central Division of Purchases, the Buyer selected is the agency Buyer.
- The Buyer field MUST be entered on the PO Defaults page.
- Validate all defaulted information is correct, and modify if necessary before clicking the **OK** button.



#### **Add Items From**

Agencies will not use the Catalog or Item Search links. Both these links look at the Item Master, which contains only items that are on a statewide contract. The Add Items From section containing the Catalog link and the Item Search link are for the use of the Division of Purchases only.

Add Items From <u>Catalog Item S</u>	<u>Search</u>					
Lines Details <u>O</u> rder By Amou	nt Y Item Information Y Default Scher	dule Y <u>R</u> elease Amounts )	Release Quantit		ind View All   🛄 eshold 🛛 📼	First 🛃 1 of 1 🕨 Last
Line Item	Description	UOM (	Category		Include for Release	Status
1	٩ 📑	■ ■ Q	<b>Q</b> (	> 🗞 🛃	<u>نه</u>	Active 🕂 🗖
View Category Hierarchy	Category Search					
Save Notify Refrest	h			E	Add Dpdate/	Display Correct History
ontract   <u>Create Release</u>   <u>Reviev</u>	w Releases   Syndication					

Figure 9. Transactional Contract Page – Add Items From Section

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Fields	Description
Catalog link	Division of Purchases use only.
	Agencies should not use this link.
	Clicking the Catalog link opens the Order
	by Catalog page. Use the Order by
	Catalog page to browse and locate items
	within the SMART item catalogs.
Item Search link	Division of Purchases use only.
	Agencies should not use this link.
	Clicking the Item Search link opens the
	Item Search criteria page. Use the Item
	Search criteria page to search for items
	listed within the item catalogs in SMART.

Table 7. Transactional Contract Page – Add Items From Section

#### Lines

**Note**: The State of Kansas is not using the 'Order by Amount', 'Default Schedule', 'Release Amounts', 'Release Quantities', or 'Spend Threshold' tab pages.

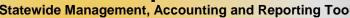
#### **Details Page**

Add Items From						
<u>Catalog</u>	Item Search					
Lines Details <u>O</u> rder B	By Amount Y Item Information Y	efault Schedule $Y$ <u>R</u> elease	Amounts Y <u>R</u> elease Quan	Customize   Find   Vie	ew All   🛄 🛛 Firs	st ٵ 1 of 1 🕨 Last
Line Item	Description	UOM Catego	ry Merchandise Ar	<u>nt</u>	Include for Release	Status
1	Q	in the second se	٩ [		<u>ک</u>	Active 🛨 🗖
View Category Hierarchy	Category Search					
Save Notify	Refresh			E+ Add	Display	Correct History
Contract   <u>Create Release</u>	<u>Review Releases</u>   <u>Syndication</u>					

Figure 10. Transactional Contract Page – Lines Section – Details Page

Participant Notes:





Fields	Description
Line Details button	Click the Line Details button to open the Details for Line (number) page. The use of the Details for Line (number) page is covered later in this course.
Item	<b>Central Division of Purchases</b> : Use the Item field to enter the item number from the Item Master
Description	Use the Description field to enter the item description. The Description field allows a maximum of 254 characters (including spaces and punctuation).
Items button	Central Division of Purchases: Click the Items button to open the Item Search criteria page for the Item Master
UOM	Use the UOM field to enter the item's unit of measure. For example: EA = Each.
Category	Use the Category field to enter the item's category code
Merchandise Amount	If you select an item from the item master file, SMART auto populates the Merchandise Amount (price) when you save. Therefore if you select an item from the item master file, you do not need to enter a value into this field.
Line Comments button	Click the Line Comments button to open the Comments for Line (number) page. Use the Line Comments page to add specific instructions or specifications for a particular line item.
Price Adjustments button	The State of Kansas is not using Price Adjustments.

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Fields	Description
PO Distribution Details button	Click the PO Distribution Details button to
	open the PO Distributions for Line
	(number) page. Use this page to enter
	Distribution details, and asset information.
Contract Agreement button	The State of Kansas is not using the
	Contract Agreements button.
Include for Release checkbox	The State of Kansas is not using this
	checkbox.
Status	The default value is 'Active'. The Status
	options are 'Active' or 'Cancelled'.
+ button	Use the + button to add multiple new rows
	at row (number)
- button	Use the – button to delete row (number)

Table 8. Transactional Contract Page – Lines Section – Details Page

#### Details for Line (number) Page

Click the **Line Details button** on the Details page to access the **Details for Line** (number) page.

Add Items From						
Catalog Item S	3earch					
Lines Details <u>O</u> rder By Amour	nt Y Item Information Y Defai	ult Schedule Y <u>R</u> elease Ar		stomize   Find   View /	All   🛗 🛛 First 🗹 1 .	of 1 🕑 Last
Line Item	Description	UOM Category	Merchandise Amt		Include for Release	
	۹ 📃		۲ P	🇞 🗟 🖉 🤕	Active	<b>H</b>
View Category Hierarchy	Category Search					
Save Notify Refresh	h			E+ Add	Update/Display	orrect History
Contract   <u>Create Release</u>   <u>Reviev</u>	w Releases   Syndication					

Figure 11. Transactional Contract Page – Lines – Details – Line Details button





Page Name	Navigation
Contract Entry - Details for Line	Supplier Contracts → Create Contracts and
(Number)	Documents $\rightarrow$ Contract Entry $\rightarrow$ Details $\rightarrow$ Lines
	Details button

Normal       Dotation of Mathematication         • Contract Entry       Definition of Mathematication         • Model and Watch Americation       Definition of Mathematication         • Model and Watch Americation       Operation of Mathematication         • Model and Watch Americation       Operation of Mathematication         • Model and Watch Americation       Operation of Mathematication         • Model and Watch Americation       Immunol Mathematication         • Model and Mathematic Mathematication       Immunol M	CMODT		
Contract Entry Contr	SIIINL		Home Worklist Add to Favorites Sign o
Dooments         - Contract True			
Declarate Management     Automate Management	Documents	Contract Entry	
- United State State State   - State Sta		Details for Line 1	
- Under a dark Vardance   - Marking and	<ul> <li>My Collaborators/View</li> </ul>		
	Access - Contract Alert Workflow		
Manage Contract Library     Supplier Contract Stells     Suphontect Stells     Supplier Contract Stells     Supplier Contract	Monitor and Update		00000000000000000000000000000000000000
	Agreements D Manage Contract Library	Line Details	
Contract Release Processe Second Processes Second Processes Proce	D Supplier Contracts Setup	Category: 14111704 Status:	Active ×
Category (E::::::::::::::::::::::::::::::::::::	D Search Content D Contract Release	Category Desc: 14111704 - Toilet tissue	
		Category ID: 01281 Physical Nature:	Goods 💌
		Transaction Item Description:	
Processes       Profected Language tem Description:         Suppler Contracts Setup       Profected Language tem Description:         Suppler Contracts Setup       Suppler Contracts Setup         Processes       Suppler Contracts Setup         Suppler Contracts Setup       Optics Contracts Setup         Processes       Suppler Contracts Setup         Suppler Contracts Setup       Vendor Tenctory         Processes       Vendor Tenctory         Suppler Contracts Setup       Vendor Ten ID:         Suppler Contract Setup       Vendor Ten ID:         Suppler Contract Setup       Vendor Tenctory         Suppler Contract Setup       Maximum Line Amount:         Suppler Contract Setup       Maximum Line Amount:       0.00         Suppler Contract Setup       Noncommuter       0.00         Suppler Contract Setup       Noncommuter<			<u>~</u>
			×
Tole Tissue - Siley Smooth Contract Release Processes Processe Proceses Procepte Procepte Procempt Proce Procempt Procempt Pr		Preferred Language Item Description:	
Processes       Sindication and         Sindication and       Remarks Step         Sindication and       Remarks Step         Sindication and       Remarks Step         Sindication and       Sindication and         Sind	D Search Content	Toilet Tissue - Silky Smooth	
	D Syndication and	Expand All Collapse All	
	D Supplier Contracts Setup D Search Content		
Processes	D Contract Release	Vendor's Catalog:	Device Tracking
Description Content Description Content Description Content Description Content Description Content Description Content Description Descrip	Processes Syndication and	Vendor Item ID:	
		Manufacturer ID:	٩
De Syncher Contracts Seep Suppler Contracts Seep Processes Syncher Contracts Seep Processes	D Contract Release	Manufacturer's Item ID: 123 E 765	Q
Supplier Contracts Setup     Search Contract Setup     Search Contract     Supplier Contracts Setup     Supplier Contracts     Supplier		UPN ID:	
	D Supplier Contracts Setup	=	
By optic Catalox Setup     Suppler Cat		✓ Release Amounts / Quantities	
Search Contract Selesse   0 Search Contract Selesse   0 Contract Release   0 Contract Release   0 Search Contract Selesse   0 Search Contract Selesse   0 Search Contract Release   0 Search Con		Minimum Line Amount: Minimum Line G	Quantity: 1.00
Observer Contents     Observer     Outputs Chainsain     Outputs Chainsains     Outputs     Ou	D Supplier Contracts Setup		
Processes       Remaining Amount:       0.00 USD       Remaining Quantity:       0.000 CS         Signification and       Signification and       0.00       Remaining Quantity %:       0.00         Signification and       Signification and       Image: Central Steps       Processes       0.00         Signification and       Price Carls Be Price       Image: Central Steps       Image: Central Steps       Image: Central Steps         Optional Research Carls Steps       Price Carls Be Changed on Order       Image: Central Steps       Image: Central Steps       Image: Central Steps         Optional Research Carls Steps       Price Carls Classe Vice UDI Adjust Image: Central Steps       Image: Central Steps       Image: Central Steps         Optional Charles       Price Carls Classe Vice UDI Adjust Image: Central Steps       Image: Central Steps       Image: Central Steps         Optional Charles       Price Carls Classe       Optional Crist Image: Central Steps       Image: Central Steps         Optional Charles       Default Distantis       Select the eligible UDI/ Pricing combinations that are available for this contract Image: Central Steps       Image: Central Steps         Optional Charles       Default Image: Central Steps       Image: Central Steps       Image: Central Steps         Optional Charles       Default Image: Central Steps       Image: Central Steps       Image: Central Steps		Total Line Released Amount: 0.00 Total Line Relea	ased Quantity: 0.00
	Processes		
	<ul> <li>Syndication and</li> <li>Supplier Contracts Setup</li> </ul>		
Processes <ul> <li>Pricing Information</li> <li>Signed Contrast Step</li> <li>Price Can Be Changed on Order</li> <li>Use Vindr Price UMA Adjustments</li> <li>Price Data:</li> <li>Price Data:</li></ul>		Remaining Amount %: 0.00 Remaining Quar	ntity %: 0.00
Subject Contracts Setup     Search Contract Setup     Search Contract Setup     Search Contract Setup     Search Contract     Subject Contracts Setup     Search Contract     Subject Contracts     Subject Contract     Subject Contract     Subject	Processes	<ul> <li>Pricing Information</li> </ul>	
Second Content     Control Content     Control Control     C		Use Contract Base Price Use Vndr Pr	ice UOM Adjustments
Processes     Price Date:     Due Date     Mainter       0     Sindication and 0     Sindication and 0     Current Order Duantity     Image: Current Order Duantity       0     Sindication and 0     Second Current Order Duantity     Image: Current Order Duantity       0     Sindication and 0     Second Current Order Duantity     Image: Current Order Duantity       0     Second Content     Second Current Order Duantity     Image: Current Order Duantity       0     Second Content     Second Current Order Duantity     Image: Current Order Duantity       0     Second Content     Second Content     Image: Current Order Duantity       0     Second Content     Second Content     Image: Current Order Duantity       0     Second Content     Default Second Content     Image: Current Order Duantity       0     Second Content     Default Second Content     Image: Current Order Duantity       0     Second Content     Image: Current Order Order Duantity     Image: Current Order Order Duantity       0     Content Filter Order Order Duantity     Image: Current Order Order Duantity     Image: Current Order Order Duantity       0     Content Filter Order Order Duantity     Image: Current Order Order Duantity     Image: Current Order Order Duantity       0     Content Filter Order Or	D Search Content	Price Can Be Changed on Order	ice Shipto Adjust
Despeic Contracts Seebp     Price Our     Search Context     Despeice Contracts Seebp     Price Our     Contract Code     Code Search Context     Sector Contex	Contract Release Processes	Price Date: Due Date V Adjust:	Before Contract Adjustment
• Sasch Content: • Orgen Content: •	Syndication and	Price Oty: Line Quantity V Order By Amoun	
	D Search Content	Amount Only	у
10: Synch Contract The Release 20: Search Contract Relea		Merchandise Ar	mount:
	Syndication and		
Processes     Other Processes       D Syndcation     Balance Drive       Previous     Balance Drive       D Promotions     D Customer Promotions       D Customer Contracts     D Control       D Control     D Control       D Control     Enter the lead times and schedule quantities to be used for contract generated purchase order       D Control     Control       D Control     Enter the lead times and schedule quantities to be used for contract generated purchase order       D Control     Control       D Control     Control       D Control     Singentor       D Control     Control	D Search Content		he Release
Messaging D Related Unixs D Customer R     Betwate True Loc     UOM     Bess Brose Curr       D Customer S     D Customer R     D Customer R       D Customer Contrads     D Customer R       D Customer Contrads     D Customer R       D Customer R     D Customer R       D Services Procurement     D R       D Ender Der R     D Customer R       D Services Procurement     D R       D Ender Der R     D R       D Services Procurement     D K       D Ender Der R     D R       D Services Procurement     D K       D Bronchang     1       D R     D K       D Services Procurement     D K       D Bronchang     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R     D K       D R	Processes		
Created Links     Costances     Costan		Delever -	First 🗹 1 of 1 🕑 Lest
	Related Links		u l
		✓ LOCAL Q CS Q 28.97000 USI	D 🛨 🖃
Order Humagement     release: Quantity is in standard UVU, and will be converted to the UOM that is selected as the     Pricing Cellinguage     Pricinguage     Pricong Cellinguage     Pricinguage     Pricingua			
Pricing Configuration     Origination     Originatio     Originatio     Originatio     Or	D Order Management	Enter the lead times and schedule quantities to be used for contract generated purchas releases. Quantity is in standard UOM, and will be converted to the UOM that is selected	se order d as the
D Terms Shupping Template Shu		Release Default at the time of release.	
0 Vendors 1 1 1 0000 CS	D Items		First 🗹 1 of 1 🗈 Last
Purchasing     I     Interview     Purchasing     I     Interview	Vendors		
b eProcurement O Services Procurement D Services Procurement D Engineering D Engineering D Engineering	Purchasing	1.0000	··· •
0. Sourcing De Engineering D Kanufacturing Dofinitions	Perocurement		
Engineering     Manufacturing Definitions		OK Cancel Refresh	
	Engineering		
	Manufacturing Definitions Production Control	v <	>

Figure 12. Details for Line (number) page





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#### **UOM/Pricing Section**

The **Price Loc** (Price Location), **UOM** (Unit of Measure), and **Base Price** fields MUST be populated on the **Details for Line (number)** page in order to be able to reference the Contract ID number on a purchase order, or on a purchase requisition in SMART. Additionally, if this information is not populated on the supplier contract, SMART will not allow you to save the contract until this information has been entered.

Fields	Description
Price Loc	Price Location. Use the Price Loc field to enter the vendor location code. This value may default based on the vendor chosen.
UOM	Unit of Measure. Use the UOM field to enter the unit of measure for the item. <b>Note</b> : If you entered the UOM on the Details page, this value will default based on the value you entered on the Details page.
Base Price	Use the Base Price field to enter the base price per unit of measure for the item. You need to enter a price as accurate as possible; however, the base price will be able to be overridden on the purchase order in SMART.
	Both the 'Allow Open Item Reference' checkbox and the 'Price Can be Changed on Order' checkbox MUST be selected if you want to be able to override the base price of the item on a requisition or a purchase order. Note: If you do not know the Base Price
	value, enter a Base Price of \$1.00.

Table 9. Details for Line (number) page – UOM/Pricing Section





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#### **Shipping Template Section**

If you are creating a supplier contract using a *line item*, then you MUST populate a numerical value in the \* **Qty Sched** field.

Fields	Description
* Qty Sched	Quantity Scheduled.
	Use this field to enter the numerical value of the quantity. <b>Note</b> : You must have a numerical value in this field in order to be able to save the contract.

Table 10. Details for Line (number) page – Shipping Template Section

#### Item Information Page

Page Name	Navigation
Contract Entry – Item	Supplier Contracts $\rightarrow$ Create Contracts and
Information	Documents $\rightarrow$ Contract Entry $\rightarrow$ Item Information

Lines						Customize   Find   View
	etails Y	Order By Amount / Item Information	Default Schedul	e Y <u>R</u> elease Amounts	Release Quantities Y Spend Threshold	
<u>Line</u>	<u>ltem</u>	Description	Physical Nature	Vendor Item ID	Vendor's Catalog	Manufacturer ID
1		٩ 🔤	•			Q

Figure 13. Transactional Contract Page – Lines Section – Item Information Page (left side)

Customize   Find	View All   🛗 🛛 First 🕙 1 of 1 🕨 Last
Manufacturer ID	Manufacturer's Item ID
	ू 📃 २ 🗄 🖃
Ē	- Add

Figure 14. Transactional Contract Page – Lines Section – Item Information Page (right side)





Note: The State of Kansas is not using the Release functionality in SMART.

Fields	Description
Line Details button	Click the Line Details button to open the Details for Line (number) page
Item	Central Division of Purchases: Use the Item field to enter the item number from the Item Master
Description	Use the Description field to enter the item description. This field allows for the entry of 254 characters (including spacing and punctuation).
Physical Nature	<ul><li>Goods (items)</li><li>Services</li></ul>
Vendor Item ID	Use the Vendor Item ID field to enter the vendor's item ID number. For example: Enter the vendor's stock number.
Vendor's Catalog	Use the Vendor's Catalog to enter the vendor's catalog details
Manufacturer ID	Use the Manufacturer ID field to enter the Manufacturer's ID for the item. If desired, use the Lookup button to search for the Manufacturer's ID. <b>Note</b> : Agencies need to contact Division of Purchases to add manufacturers to the list in SMART.
Manufacturer's Item ID	Use the Manufacturer's Item ID field to enter the manufacturer's item ID. While this has a look up field, you may enter any value.
+ button	Use the + button to add multiple new rows at row (number)
- button	Use the – button to delete row (number)

Table 11. Transactional Contract Page – Lines Section – Item Information Page





#### **Contract Page – Links and buttons**

Page Name Contract Entry	Navigation Supplier Contracts $\rightarrow$ Create Contracts and Documents $\rightarrow$ Contract Entry
	OM <u>Category</u> <u>Merchandise Amt</u> <u>Include for</u> <u>Status</u>
1       Image: Category Hierarchy       Category Search         Image: Save       Image: Notify       Image: Refresh         Contract   Create Release   Review Releases   Syndication	Active 🖈 🖃

Figure 15. Transactional Contract Page – Bottom of page

Fields	Description
View Category Hierarchy link	State of Kansas Agencies do NOT use
	this link. <i>This link is to be used by</i>
	Central Division of Purchases only.
Category Search link	State of Kansas Agencies do NOT use
	this link. This link is to be used by
	Central Division of Purchases only.
Add button	Use the Add button to add a new
	contract.
	Note: You must save the current contract
	before you can begin a new contract.
	Refer to the Save button for additional
	information.

Table 12. Transactional Contract Page - Bottom of page





#### **Add Comments link**

Page Name	Navigation
Contract Entry – Header	Supplier Contracts → Create Contracts and
Comments	Documents $\rightarrow$ Contract Entry – Header Comments
	link

Contract Entry	
Header Comments	
SetID: SOKID Contract ID: NEXT *Sort Method: Comment Time Stamp	*Sort Sequence: Ascending 👽 Sort
Comments	<u>Find</u>   View All First 🖪 1 of 1 🕨 Last
Copy Standard Comments	Comment Status: Active Inactivate +
Send to Vendor Shown at Receipt Shown at Receipt	nown at Voucher 🛛 Copy to Purchase Order
Associated Document	
Attachment	Attach View Delete Email
From -> CNT SOKID-NEXT	
OK Cancel Refresh	

Figure 16. Header Comments page

Use the Comments page to add comments that pertain to the entire supplier contract.

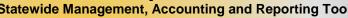
Note: State of Kansas agencies are NOT using the Standard Comments functionality.



Fields Sort Method	<ul> <li>Comment Time Stamp - Select to sort the comments by the time stamp that the system assigns when comments are created.</li> <li>Vendor Flag – Do not use this option (Use PO Comments).</li> </ul>
Sort Sequence	<ul><li>Ascending</li><li>Descending</li></ul>
Sort button	After selecting the Sort Method and Sort Sequence, click the Sort button to perform the sort according to sort method and sequence chosen.
Comment Status	<ul> <li>Active – An 'active' comment is able to be viewed using the sort methods</li> <li>Inactive – 'Inactive' comments are stored for archive purposes, and they are not able to be viewed using sort methods for current active comments. You must change your sort criteria if you wish to view inactive comments. To view Inactive comments, deselect the checkbox next to "Retrieve Active Comments Only", then select the Retrieve button.</li> </ul>
Inactivate button	Use the Inactivate button to change the status of a comment from 'Active' to 'Inactive'.

Participant Notes:





Fields	Description	
+ button	Use the + button to add a new comment.	
Spellcheck button	Use the spellcheck button to spell check	
	the comment text.	
Send to Vendor checkbox	Do not use this checkbox. Based on	
	the State of Kansas business process in	
	SMART, comments on the Contract	
	Header cannot be sent to the vendor.	
	Use PO Comments to send to vendor.	
Shown at receipt checkbox	Do not use this checkbox. Based on	
	the State of Kansas business process in	
	SMART, comments on the Contract	
	Header cannot be shown at the receipt.	
	Use PO Comments to include comments	
	at the receipt.	
Shown at voucher checkbox	<b>Do not use this checkbox</b> . Based on	
	the State of Kansas business process in	
	SMART, comments on the Contract Header cannot be shown at the voucher.	
	Use PO Comments to include comments	
	on the voucher.	
Copy to Purchase Order checkbox	<b>Do not use this checkbox</b> . Based on	
	the State of Kansas business process in	
	SMART, comments on the Contract	
	Header cannot be shown on the PO. Use	
	PO Comments to include comments.	
Associated Document: Attachment	Enables you to attach documents to the	
	header level of the transactional contract	
	in SMART. For example: A contract	
	document that your agency created	
	outside the SMART system or a copy of a	
	vendor contract that your agency signed.	

### Participant Notes:





Fields	Description
Attach button	Click the attach button to browse, locate and upload file(s) from your local server to the header level of the transactional contract in SMART.
	It is important to know that you need to add attachments to the transactional contract BEFORE saving the transactional contract. Once you have saved the contract, you are unable to add, change or delete file attachments.
	File attachments stored at the header level of a transactional contract are NOT able to be viewed by the public on the Department of Administration website. In other words, only transactional contract data entered in SMART on the Contract Entry page(s) is able to be viewed on the website.
View button	The View button is enabled once an attachment has been uploaded to the header level of the transactional contract in SMART. Click the View button to open and view the document (in the application in which it was created, for example: Microsoft Word or Excel).
Delete button	The Delete button is enabled once an attachment has been uploaded to the header level of the transactional contract in SMART. Click the Delete button to delete (remove) an attachment from the transactional contract.





Fields	Description
Email checkbox	<b>Do not use this checkbox</b> . Based on the State of Kansas business process in SMART, attachments on the Contract Header cannot be emailed.
OK button	Once you have completed all information and comment text on the Header Comments page, click the OK button. Clicking the OK button returns you to the Contract page.
	When you return to the Contract page, the Add Comments link name changes to Edit Comments.
	Clicking the Edit Comments link returns you to the Header Comments page, where you can view and edit the comments, and change the file attachments as necessary. Click the OK button to save any changes you make on the Header Comments page.
Cancel button	Click the Cancel button to return to the Contract page without saving changes you made to the Header Comment page or text.
Refresh button	Use the Refresh button to refresh the Header Comment page and comment text.

Table 13. Header Comments page





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#### **Contract Activities link**

Page Name	Navigation
Contract Entry – Contract	Supplier Contracts $\rightarrow$ Create Contracts and
Activities	Documents $\rightarrow$ Contract Entry $\rightarrow$ Contract Activities
	link

Contract Entry		
Contract Activities		
SetID: SOKID Contract ID: NEXT		
Activities	Customize   Find   View All	First 🕙 1 of 1 🕩 Last
Activities <u>*Due Date Done *Comments</u>	<u>Customize   Find</u>   View All   🚟	First 🛃 1 of 1 🕨 Last
	<u>Customize   Find</u>   View All   🚟	First 🕙 1 of 1 🕨 Last

#### Figure 20. Contract Activities Page

- Provides notekeeping and reporting functionality for agencies. For example: Agencies can choose to use the Contract Activities function to keep track of activities that need to occur on a contract. Agencies must enter these activities before saving the contract.
- It is important to know that the Contract Activities page does not contain any functionality in SMART, i.e. SMART does not provide email notifications, or worklist items for any information entered on this page.





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### Primary Contract Info link

Page Name	Navigation
Vendor Contact Information	Supplier Contracts → Create Contracts and Documents → Contract Entry → Primary Contact Info link

Vendor Contac	t Informa	tion		
Contact Name:	Micky Cats	;		
Country:	USA	United State	s	
Address 1:				
Address 2:				
Address 3:				
City:				
County:			Postal:	
State:				
Telephone		<u>Customize</u>	<u>Find</u>   View All   🟪	First 🗹 1 of 1 🕩 Last
	<u>l</u>	nt'l Prefix	Telephone	Phone Extension
Business			785/272-2288	27272
Return				

Figure 21. Vendor Contract Information Page

The **Vendor Contact Information** page contains the contact details, including phone number for the vendor's primary contact for the contract (this information is sourced from the Vendor file, and is maintained by Central).





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<u>Contract Agreement link</u> The State of Kansas has elected not to utilize the Contract Agreement functionality. Please do not use this link.

### **Activity Log link**

Page Name	Navigation
Contract Entry – Activity Log	Supplier Contracts $\rightarrow$ Create Contracts and
	Documents $\rightarrow$ Contract Entry $\rightarrow$ Activity Log link

Contract Entr	гу	
Activity Lo	og	
Entered		
By User: Date :	12/21/2009	
Modified		
By User: Date/Time :		
Approved		
By User: Date :		
Return		

### Figure 22. Activity Log Page

The Activity Log page tracks and keeps history for the most recent changes made to the transactional contract in SMART.





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### **Document Status link**

Page Name	Navigation
	Supplier Contracts $\rightarrow$ Create Contracts and
Status	Documents $\rightarrow$ Contract Entry $\rightarrow$ Document Status
	link

Clicking the Document Status link opens the Document Status page where you are able to locate and click on links to navigate to purchase orders or purchase requisitions which are related to the specific transactional supplier contract in SMART.

Docume	nt Status						
SetID:	SOKID	Contract:	000000000000000000000000000000000000000	00000000020	Status:	Approved	
Document Da	ate: 11/16/2009	Document Typ	e: Contract				
Currency:	USD	Released Amo	ount:	192.15	Short Vendor N	ame: PO_VNDR	002-00
Buyer:	PO Kansas B	uyer					
Associated I				<u>Customize   Fir</u>	id   View All   🛄 🛛	First 🛃 1-6 of 10	Last
Document	s Related Info	<b></b> )				_	
<u>Business</u> <u>Unit</u>	Document Type	DOC ID	<u>Status</u>	Document Date	<u>Vendor ID</u>	Location	
35200	PO	000000003	Dispatched	12/15/2009	000000009 📃	MAIN	
	PO	000000006	Approved	01/04/2010	000000009 📃	MAIN	
27600		000000007	Approved	01/04/2010	000000009 🔎	MAIN	
27600 03900	PO	00000007					
	PO PO	0000000010	Open	12/11/2009	000000009 📃	MAIN	
			Open Dispatched	12/11/2009 12/14/2009	0000000009 <u>月</u> 00000000009 <u>月</u>	MAIN	
03900 17300	PO	0000000010					

Figure 23. Contract Doc Status – Documents Page





<u>Thresholds & Notifications link</u> The State of Kansas has elected not to utilize Thresholds and Notifications. Please do not use this link.

### **Amount Summary**

Page Name	Navigation
Contract Entry	Supplier Contracts → Create Contracts and Documents → Contract Entry → Amount Summary Section

Fields	Description
Maximum Amount	Use this field to enter the maximum contract amount (contractual obligation).
	<ul> <li>Use of this field is contingent on the type of contract being created. Examples of when this field should be used: The creation of a firm fixed cost contract, or a Not-To- Exceed cost contract.</li> <li>This field is NOT used for an</li> </ul>
	open ended contract.
Line Released	Displays the total released amount of the contract, which is the open item amount plus the total of the line amounts. This amount is updated during the PO Calculations process, online purchase order creation, and the Account Payables Batch Voucher process when the contract is referenced.





Fields	Description
Open Item Relsd	Displays the amount that is released for open items in an open item contract. This information appears only if the contract is referenced on a purchase order using open item referencing. This amount is updated during the PO Calculations process or online purchase order creation.
Total Released Amount	<ul> <li>A control total line associated with the Maximum Amount line.</li> <li>The Total Released Amount accumulates the amount for all purchase orders issued using the specific Contract ID.</li> <li>Business procurement card transactions without a purchase order will not accumulate (in the total released amount) on contract.</li> <li>If the contract contains a maximum amount, and you wish to use a business procurement card for the purchases, a purchase order will also need to be created in order to accumulate the total released amount accurately.</li> </ul>

Table 15. Contract Page – Amount Summary Section

### Participant Notes:

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#### Save Button

Fields	Description
Save button	Verify all supplier contract information is correct and all attachments have been attached.
	If the contract DOES NOT require Division of Purchases' approval, change the <b>Status</b> to 'Approved' <b>before</b> clicking the <b>Save</b> button. If the contract DOES require Division of Purchases' approval, leave the status in 'Open'. If approved, Division of Purchases will change the status to 'Approved'.
	It is important to know that once an Agency has saved a transactional contract in SMART, the transactional contract is unable to be modified or edited by the Agency in any way.
	When an Agency approves and saves a transactional contract, the contract (including attachments) is locked by SMART. The Agency is unable to edit or update the transactional contract once the 'Save' button has been clicked.
	If an Agency determines that a transactional contract needs to be changed after it has been saved, the Agency must contact the Central Division of Purchases for assistance.

Table 16. Contract Page – Save Button





Fielde	Deservition
Fields         Notify Button         Image: Notify         Please refer to the screenshots         following this table	<b>Description</b> If the contract requires Division of Purchases' approval, the contract will be saved in an 'Open' status. Once saved, click on the 'Notify' button which will open the ' <b>Send Notification</b> ' page.
	You may either type the appropriate Division of Purchases Buyer's e-mail in the 'To:' field or click on the ' <b>Lookup Recipient' link</b> to search for the Buyer.
	Enter the 'Subject' and any desired 'Message'. <i>Please do NOT change the 'Template Text' content.</i>
	When using the 'Lookup Recipient', enter the Division of Purchases Buyer's last name and click the ' <b>Search</b> ' button. Select the Buyer by selecting the ' <b>To</b> ' box, then clicking the ' <b>Add to Recipient</b> <b>List'</b> button. Click the <b>OK</b> button to return to 'Send Notification' page.
	By selecting the <b>'Delivery Options' link</b> , you will be able to choose the <b>Recipient Options</b> . This allows you to determine whether to place this notification on the Buyer's worklist and/or e-mail. <b>Both the 'Worklist' and 'Email' checkboxes</b> <b>default as selected. Please do not change the</b> <b>default selections</b> . Click the <b>OK</b> button to return to 'Send Notification' page.
	Clicking the <b>OK button</b> on the 'Send to Notification' page notifies the Buyer that your contract requires review.

Table 17. Contract Page – Notify Button



Notification		ERY OPTIONS to view or change the met	
To: CC: BCC:			Delivery Options
BCC:		63	
Priority:	×		
Subject:	<enter here="" subject=""></enter>	and the second s	
Template Text:	Workflow Notification Priority: %NotificationPriority	Please d change Text.	o not Femplate
Message:	Data Cost. 2010.02.05.		

Figure 24. Send Notification Page



LOO	kup /	Addres	S		
Recipi	ent Sea	irch			
Nam	e:	hoobler Search			
Searc	h Resul	ts		Customize   Find   View All	First 1 of 1 E Las
ΙQ	22	bec	Recipient	Email Address	User ID
		🗆 💧	Hoobler, Angela	buyer@da.ks.gov	KPO_BUYER2
_	to Recip	pient List			
To:				C)	
CC:					
				<u> </u>	

Figure 25. Send Notification - Lookup Address

Recip	ient Options 🔍	istomize i Eind I 🕮	First 🛃 1	of 1 E Last	
	Recipient	14	Worklist	Email	
ů	Hoobler, Angela/KPO_BUYER2				
OF	K Cancel			of Worklis	ave the default st and the Email res selected.

Figure 26. Send Notification – Recipient / Delivery Options





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### Walkthrough/Activity

We will now complete Activity 2 - Walkthrough: Enter Supplier Contract Transactional Data in your Activity Guide.



### Walkthrough/Activity

You will now complete Activity 3 – Exercise: Enter Transactional Data for Supplier Contract in your Activity Guide.

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### **Topic 3: Copying an Existing Supplier Contract**

Page Name	Navigation
Contract Entry – Copy Contract	Supplier Contracts $\rightarrow$ Create Contracts and
	Documents $\rightarrow$ Contract Entry $\rightarrow$ Copy From
	Contract link $\rightarrow$ Copy Contract page

Contract Entry						
Copy Contract						
SetID:	SOKID					
Contract ID:	NEXT					
Contract Sear	arch					
Contract ID:	Master Cont	tract ID:				
Vendor:		Open Item Reference				
Vendor ID:	Q					
Search						
Select Contra	Select Contract Customize   Find   # First 1 of 1 D Last					
Sel Contr	ntract ID Description	Vendor ID Short Vendor Vendor Contract Ref				
ОК	Cancel Refresh					

Figure 27. Copy Contract Page

This space intentionally left blank. Please turn to the next page.



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### **Contract Search**

Use the Contract Search section to enter the search criteria for the existing transactional contract in SMART.

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

Figure 28. Contract Search Page

Fields	Description
Contract ID	Use the Contract ID field to enter the
	contract ID number
Vendor	Use the Vendor field to enter the vendor
	name
Vendor ID	Use the Vendor ID field to enter the
	vendor ID number
Allow Open Item Reference checkbox	Select the Allow Open Item Reference
	checkbox to indicate that the transactional
	contract you are searching for contains an
	open item reference

Table 18. Contract Search Page

Once you have entered your search criteria, click the Search button to locate the transactional contracts in SMART. The search results are displayed in the Select Contract section.



### Select Contract – Contracts Page

Select	Select Contract First 🗹 1 of 1 🕑 Last						
Con	ntracts <u>M</u> ore Details						
<u>Sel</u>	Contract ID	Description	Vendor ID	<u>Short Vendor</u> <u>Name</u>	Vendor Contract Ref		
	000000000000000000000000000000000000000	000000001 Paper Towel Contract	00000000	1 MOM'S DESI-001			
OK	Cancel R	efresh					

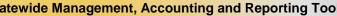
Figure 29.	Select	Contract –	Contracts Page
------------	--------	------------	----------------

Fields	Description
Sel checkbox	Use the Sel checkbox to select the
	existing transactional contract you
	wish to copy
Contract ID	Displays the existing transactional
	contract's ID number
Description	Displays the Description for the existing
	transactional contract (sourced from the
	Description field in the header section)
Vendor ID	Displays the vendor ID number for the
	existing transactional contract
Short Vendor Name	Displays the Short Vendor Name for the
	vendor on the existing transactional
	contract
Vendor Contract Ref	If a Vendor Contract Ref was entered on
	the existing transactional contract (in the
	Header section), it will be displayed here

Table 19. Select Contract – Contracts Page

This space intentionally left blank. Please turn to the next page.





### Select Contract – More Details page

	Contract tracts / More Details / (===)		Customize   Find	🛗 🛛 First 🗹 1 of 1	▶ Last
<u>Sel</u>	Contract ID	Contract Status	Expire Date	Master Contract ID	<u>Open</u> Item
	000000000000000000000000000000000000000	Approved	12/22/2011		$\checkmark$
ОК	Cancel Refresh				

Figure 30. Select Contract – More Details Page

Fields	Description
Sel checkbox	Use the Sel checkbox to select the
	existing transactional contract you
	wish to copy
Contract ID	Displays the existing transactional
	contract's ID number
Contract Status	Displays the existing transactional
	contract's status
Expire Date	Displays the Expire date (from the Header
	section) of the existing transactional
	contract
Open Item checkbox	<ul> <li>If the existing transactional</li> </ul>
	contract is an 'Allow open item
	reference' contract, then this
	checkbox is displayed as selected.
	If the existing transactional
	contract is not an open item
	•
	contract, then this checkbox is
	displayed as empty (blank).

Table 20. Select Contract – More Details Page

**Participant Notes:** 

KANSAS





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Once you have selected the existing transactional contract you wish to copy (by selecting the Sel checkbox), click the OK button. Clicking the OK button, returns you to the Contract page. The details from the existing transactional contract are populated into the Contract page:



# It is important to know that only the transactional data entered in the existing transactional supplier contract will populate into the new transactional contract. For example: Attachments and comments will not be copied to the new transactional supplier contract.

It is imperative that you verify and modify ALL the new transactional contract information **before** saving the new transactional supplier contract.

*Remember*: You are unable to edit or modify a transactional contract once it is saved. Contact the Central Division of Purchases for assistance.

The Contract ID will be assigned to the new transactional contract when you save it.



You will now complete Activity 4 - Walkthrough: Copy Existing Transactional Supplier Contract in your Activity Guide.





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### Lesson Review

In this lesson, you learned:

- How to use the transactional contract pages in SMART
- How to create a new transactional supplier contract in SMART
- How to copy an existing transactional supplier contract to create a new transactional contract in SMART
- The business processes associated with transactional contracts in SMART

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