

Entering Supplier Contracts Job Aid

Supplier Contracts > Create Contracts and Documents > Contract Entry

Contract Entry

Find an Existing Value | Keyword Search | Add a New Value

SetID SOKID

Contract ID NEXT

Contract Process Option Purchase Order

Add

Find an Existing Value | Keyword Search | Add a New Value

Please leave all defaults as displayed. Click 'Add'.

Note: If Contract Process Option is not Purchase Order, use the dropdown arrow and choose 'Purchase Order'.

Contract Entry

Contract

SetID SOKID Copy From Contract

Contract ID NEXT

*Status Open

Administrator/Buyer DA00BJW

Contract Version

Version 1 Status Current

New Version Approval Due Date

Add a Document

Header

Process Option Purchase Order

*Supplier 0000161071

*Begin Date 01/26/2016

Expire Date 01/31/2017

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref Description Sample Contract Entry

Master Contract ID

Tax Exempt ID

Tax Exempt

Add Comments

Contract Activities

Primary Contact Info

Contract Header Agreement

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

Bidder Preferences

Amount Summary

| | | |
|---------------------------|--------|-----|
| Maximum Amount | 500.00 | USD |
| Line Item Released Amount | 0.00 | |
| Category Released Amount | 0.00 | |
| Open Item Released Amount | 0.00 | |
| Total Released Amount | 0.00 | |

Note: the Begin Date is the date you enter it into SMART. This date is there by default and will be the current date. Please enter a description as this contract will be posted on the public website. The Administrator/Buyer's email and phone number will also be posted on the website.

Tax Exempt

Contract Term/Renewals

*Actual Contract Start Date (mm/dd/yyyy):

*Initial Contract Expiration Date (mm/dd/yyyy):

Number of Renewals Established

Renewal Duration (in months)

Current Renewal Period

Ex: 0 = Equals initial contract term, 1 = Equals first renewal

Order Contract Options ?

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date 01/26/2016

Corporate Contract Adjust Supplier Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order

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

Enter the contract terms – the actual contract start may differ from the begin date. The expiration date will be identical to the expiration date above.

Uncheck 'Corporate Contract' and Check 'Allow Open Item Reference (see below)

Order Contract Options ?

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date 01/26/2016

Corporate Contract Adjust Supplier Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order

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

When ready, click 'PO Defaults' link

Contract Entry

PO Defaults

SetID SOKID Contract ID NEXT Version 1 Supplier ID 0000161071

Header Find | View All First 1 of 1 Last

*Business Unit Copy from BU Defaults

Supp Loc

Buyer

Origin

Billing Location

Currency

Tax Exempt

Payment Terms ID

Tax Exempt ID:

Shipping Information

Ship To Ship To Address

Location

IN Unit

Freight Terms

Ship Via

Charge By

AM Business Unit

Capitalize

Profile ID

Cost Type

Ultimate Use Code

Where Performed

Distributions Personalize | Find | View All |

Distributions

| *GL Unit | Dept | Fund | Bud Unit | Program | Account | PC Bus Unit | Project | Activity |
|---|--|--|--|--|--|--|--|--|
| <input type="text" value="17300"/> <input type="button" value="🔍"/> | <input type="text" value=""/> <input type="button" value="🔍"/> |

Add Comments

On this page you only need to enter your agency Business Unit so that agency end users may access this contract when entering a PR. Note: Click 'Refresh' and all other fields will auto-populate as necessary. The billing location, ship to, buyer and funding distribution will be entered on the PR as appropriate. This information WILL NOT transfer to eProcurement .

When complete, click 'OK'

Contract

| | | |
|--------------------------------------|---------------------------|-----------------------------|
| SetID SOKID | Contract Version | |
| Contract ID 000000000000000000041213 | Version 1 | Status Current |
| *Status Canceled | New Version | Approval Due Date |
| Administrator/Buyer DA00BJW | Brienne Wilkins | Add a Document |
| Process Option Purchase Order | Add Comments | Activity Log |
| Supplier GTDISTRIB-001 | Contract Activities | Document Status |
| Supplier ID 0000161071 | GT DISTRIBUTORS INC | Primary Contact Info |
| | Contract Header Agreement | Thresholds & Notifications |
| Begin Date 01/26/2016 | Contract Releases | |
| Expire Date 01/31/2017 | | |

You will be taken back to the 'Contract Entry' screen. You will need to click 'Add Comments' and attach documents. Note: You will need to complete this step for ALL contracts approved by prior authorization for audit purposes.

Header Comments

| | | |
|---|---------------------------------------|-------------------|
| SetID SOKID | Contract ID 000000000000000000041213 | Version 1 |
| <input checked="" type="checkbox"/> Retrieve Active Comments Only | Retrieve | |
| *Sort Method Comment Time Stamp | *Sort Sequence Ascending | Sort |

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

Send to Supplier Show at Receipt Copy to Purchase Order

Show at Voucher

Associated Document

| | | | | |
|------------|---------------------|-------------------|---------------------|--------------------------------|
| Attachment | Attach | View | Delete | <input type="checkbox"/> Email |
|------------|---------------------|-------------------|---------------------|--------------------------------|

From -> CNT SOKID-000000000000000000041213

OK Cancel Refresh

Click on 'Use Standard Comments' to add the prior authorization comment.

Standard Comments

Comments

*Action **Copy Comment** ▼

Comment Type  Comment ID 

*Effective Date *Status ▼

Description

Short Desc

Comments

OK Cancel Refresh

Click the magnifying glass next to 'Comment Type'

Look Up Comment Type ✕

Help

SetID SOKID

Standard Comment Type ▼

Description ▼

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-8 of 8 Last

| Standard Comment Type | Description |
|-----------------------|--------------------------------|
| AST | Asset Handling Info |
| CHG | Change Order Information |
| DEL | Delivery Comments/Instructions |
| ITM | Item Information |
| ORD | Purchase Order Comments |
| RCV | Receiving Comments/Instruction |
| SCN | Supplier Contract Comments |
| SHP | Shipping Comments/Instructions |

Click on 'Supplier Contract Comments'

Standard Comments

Comments

*Action ▼

Comment Type  Comment ID 

*Effective Date *Status ▼

Description

Short Desc

Comments

Click the magnifying glass next to 'Comment ID'

Look Up Comment ID ✕

Help

SetID SOKID
Standard Comment Type SCN

Standard Comment ID

Description

[Basic Lookup](#)

Search Results

View 100 First  1-11 of 11  Last

| Standard Comment ID | Description |
|---------------------|--------------------------------|
| COOP | Cooperative Agreement Contract |
| NADF | No - Administrative Fee |
| NPCR | No - Procurement Card |
| NPLS | No - Political Subdivisions |
| PA1 | Prior Authorization Info |
| SWMU | Statewide Mandatory Use |
| SWOU | Statewide Optional Use |
| YIAF | Yes - Invoice Admin Fee |
| YPAF | Yes - Price Admin Fee |
| YPCR | Yes - Procurement Card |
| YPLS | Yes - Political Subdivisions |

Click on 'Prior Authorization Info'

Standard Comments

Comments

*Action

Comment Type Comment ID

*Effective Date *Status

Description

Short Desc

Comments

Click 'OK'.

Note: You cannot edit the Req ID # here, you must click ok first.

Contract Entry

Header Comments

SetID SOKID Contract ID 0000000000000000000041213 Version 1

Retrieve Active Comments Only

*Sort Method *Sort Sequence

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active

This contract is established with Division of Purchases' Prior Authorization approval, refer to Requisition ID #_56789_

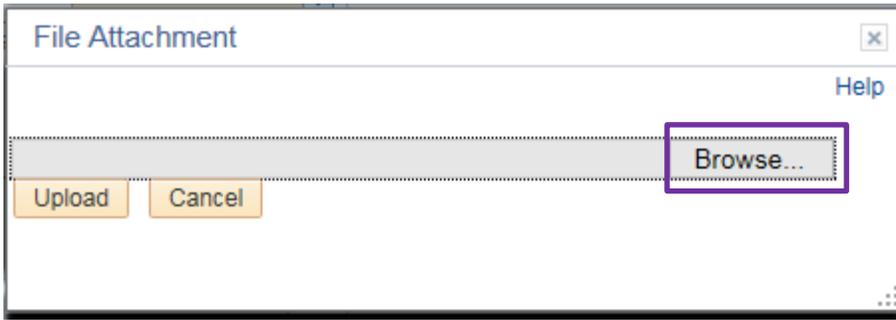
Send to Supplier Show at Receipt Copy to Purchase Order

Show at Voucher

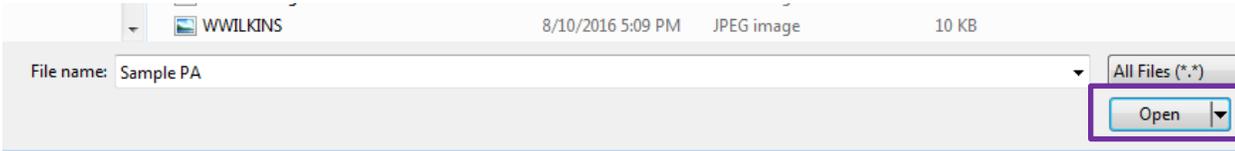
Associated Document

Attachment Email

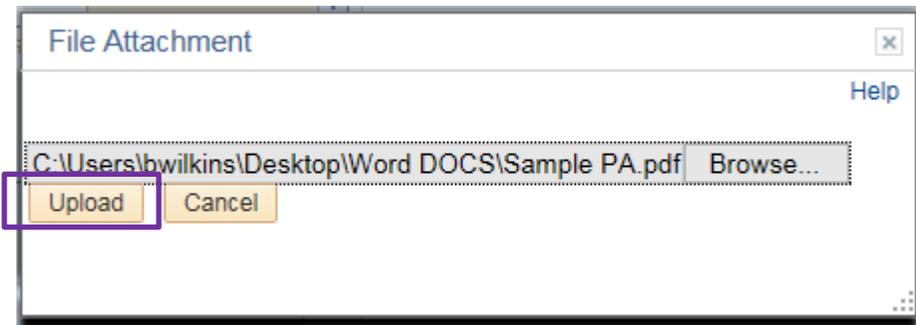
Enter your Req ID # and click 'Attach' to add your prior authorization that has been approved by an OPC Procurement Officer.



Click 'Browse' to navigate to your document.



Select the document and click 'Open'



Click 'Upload'

Contract Entry

Header Comments

| | | | | | |
|-------|-------|-------------|--------------------------|---------|---|
| SetID | SOKID | Contract ID | 000000000000000000041213 | Version | 1 |
|-------|-------|-------------|--------------------------|---------|---|

Retrieve Active Comments Only Retrieve

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

This contract is established with Division of Purchases' Prior Authorization approval, refer to Requisition ID #_56789_

Send to Supplier Show at Receipt Copy to Purchase Order

Show at Voucher

Associated Document

| | | | | | |
|------------|---------------|--------|------|--------|--------------------------------|
| Attachment | Sample_PA.pdf | Attach | View | Delete | <input type="checkbox"/> Email |
|------------|---------------|--------|------|--------|--------------------------------|

From -> CNT SOKID-000000000000000000041213

OK Cancel Refresh

Document is now attached. When complete, Click 'OK'

You will be taken back to the 'Contract Entry' screen. To proceed, choose **Option #1** or **Option #2**.

Contract Entry
Contract

SetID SOKID Copy From Contract

Contract ID NEXT

*Status Open

Administrator/Buyer DA00BJW Brienne Wilkins

Contract Version

Version 1 Status Current

New Version Approval Due Date

Add a Document

If agency supplier contract maximum amount is \$25,000 or less and agency has received **PRIOR** approval via a prior authorization, proceed with **Option #1**. If agency supplier contract maximum is over \$25,000, agency must proceed with **Option #2**.

Option #1 – Contract Maximum \$25,000 or less

Contract Entry
Contract

SetID SOKID Copy From Contract

Contract ID NEXT

*Status Open

Administrator/Buyer DA00BJW Brienne Wilkins

Contract Version

Version 1 Status Current

New Version Approval Due Date

Add a Document

To approve your supplier contract, change the Status to Approved, scroll down and click Save.

Contract Entry
Contract

SetID SOKID

Contract ID 0000000000000000000000041213

*Status Approved

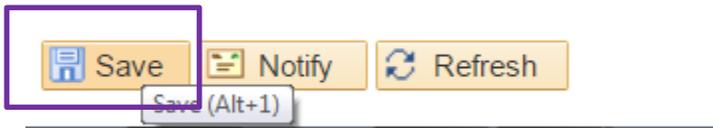
Administrator/Buyer DA00BJW Brienne Wilkins

Contract Version

Version 1 Status Current

New Version Approval Due Date

Add a Document



You now have a contract ID and an approved contract. Agency supplier contract is ready to be used.

Note: You do not need to notify Procurements and Contracts for approval.

Option #2 – Contract Maximum over \$25,000

Contract Entry
Contract

SetID SOKID  Copy From Contract

Contract ID NEXT

*Status Open

Administrator/Buyer DA00BJW  Brienne Wilkins

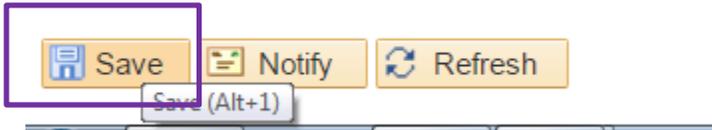
Contract Version

Version 1 Status Current

New Version Approval Due Date

Add a Document

To get your contract ID and to notify Procurements and Contracts for approval, scroll down and click Save.



Contract Entry Contract

SetID SOKID

Contract ID 00000000000000000000041213

*Status Open

Administrator/Buyer DA00BJW  Brienne Wilkins

You now have a contract ID. Now you will need to notify Procurement and Contracts staff to approve your supplier contract. So scroll all the way down and click 'Notify'



You will be taken to the 'Send Notification' screen.

Send Notification

Type names or email addresses in the To, CC, or BCC fields, using a semi-colon as a separator.

Click LOOKUP RECIPIENT to search for a name. Click DELIVERY OPTIONS to view or change the method of the send.

Notification Details

To: brienne.wilkins@da.ks.gov

CC:

BCC:

Priority:

Subject: Please approve Contract XXXX

Template: Workflow Notification
Priority: %NotificationPriority
Date Sent: 2016-01-26

Message: Brie, please approve.

Lookup Recipient
Delivery Options
 RichText

Click OK to send this notification and exit this page. Click Cancel to exit this page without sending a notification.

Click Apply to send this notification and remain on this page.

Enter the email address of the appropriate buyer for the commodity, a subject and if necessary, a message and click 'OK'. Do not click 'Delivery Options' and do not edit the Template.

Contract Entry Contract

SetID SOKID

Contract ID 000000000000000000041213

*Status

Administrator/Buyer DA00BJW Brie Wilkins

Contract Version

Version 1 Status Current

New Version Approval Due Date

Add a Document

▼ Header ?

Process Option Purchase Order

*Supplier GTDISTRIB-001 Supplier Search

*Supplier ID 0000161071 GT.DISTRIBUTORS.INC

*Begin Date 01/26/2016

Expire Date 01/31/2017

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref

Description Sample Contract Entry

Master Contract ID

Tax Exempt ID

Tax Exempt

Add Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases

Activity Log
Document Status
Thresholds & Notifications
Bidder Preferences

Amount Summary ?

| | | |
|---------------------------|--------|-----|
| Maximum Amount | 500.00 | USD |
| Line Item Released Amount | 0.00 | |
| Category Released Amount | 0.00 | |
| Open Item Released Amount | 0.00 | |
| Total Released Amount | 0.00 | |

You will be taken back to the 'Contract Entry' page and the buyer will receive the notification to approve your contract (*sample below*).

Note: Agencies can still manually, via Outlook, notify the appropriate buyer to approve supplier contracts; however the system has the functionality to do it for you if you choose to use it.

In addition, agencies have the option to approve their own supplier contracts that are \$25,000 or less with an approved prior authorization from Procurements and Contracts. If an agency chooses NOT to approve their own supplier contracts \$25,000 or less, they must follow the steps of Option #2.

Any supplier contracts over \$25,000 **must be** approved by Procurement and Contracts buyers.

Buyer Notification Email SAMPLE

Please approve Contract XXXX

 brienne.wilkins@da.ks.gov

Sent: Tue 1/26/2016 5:15 PM

To:  Wilkins, Brienne [DAFPM]

Workflow Notification

Priority:

Date Sent: 2016-01-26

Sent To: brienne.wilkins@da.ks.gov

cc:

Please click on the link below to access this transaction:

https://smart.sok.ks.gov/psp/sokfsprd_1/EMPLOYEE/ERP/c/CONTRACT_MGMT.CNTRCT_ENTRY.GBL?Page=CNTRCT_HDR&CNTRCT_ID=000000000000000000041213&SETID=SOKID&Action=U

Message Text:

Brie, please approve.

