Create a Contract

How to Create a Contract

- Open awarded Sourcing Event
  - Click evaluations >Suppliers Responses (left side of page)
- Click **Scenario Breakdown**

Contracts
Suppliers
Sourcing
Reporting
Administer
Setup

Back to Event

Awarded This event has been awarded to **Bubba's Test Co.**

Workflow Actions

Award Scenario for Golf Cart DOP

History ?

Load Saved Scenario | Export

Scenario Navigator | Scenario Breakdown 1 | Scenario Savings

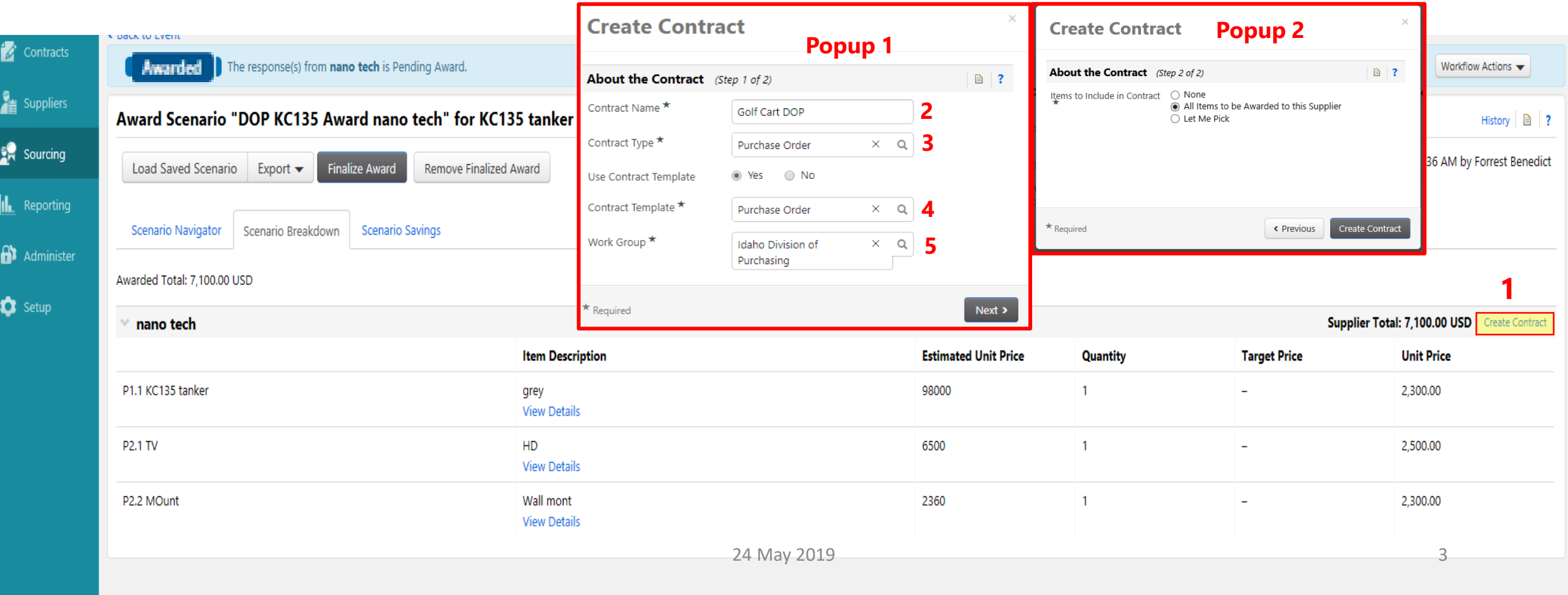
Sort Bids by: Total Bid | Ascending | Show Supplier Response Notes | Expand All | Collapse All

	Awarded Scenario	Bubba's Test Co Awarded	nano tech
Response Notes		1000 characters remaining	1000 characters remaining
Total Bid	Bubba's Test Co	18,000.00 USD	36,000.00 USD
Product Line Items	**Bubba's Test Co**	**18,000.00 USD**	**36,000.00 USD**
Questions			

How to Create a Contract

- Click on **Create** Contract located far right of page

- This popup will appear after clicking the **Create Contract**
  - Fill out all fields



How to Create a Contract

- Sourcing event moving from Award to Contract has no DPA workflow
- DPA workflow will happen once you submit the draft contract for approval

- Click on the contract number highlighted in blue

Approve
Close Without Awarding
Create New Quick Quote Stage
Create New Stage
Forward To ...
Put on Hold
Return To Evaluator

Under Evaluation The response(s) from **nano tech** is Pending Award. Workflow Actions

Award Scenario "DOP KC135 Award" for KC135 tanker Finalized

History ?

Load Saved Scenario | Export | Finalize Award | Remove Finalized Award

Last updated 4/18/2019 9:46 AM by Forrest Benedict

Scenario Navigator | Scenario Breakdown | Scenario Savings

Awarded Total: 2,300.00 USD

nano tech **Supplier Total: 2,300.00 USD** Create Contract

	Item Description	Estimated Unit Price	Quantity	Target Price	Unit Price	Contract Number & Status
P1.1 KC135 tanker	grey View Details	98000	1	–	2,300.00	1 Contract-S-Proc-PO-000003 Draft

How to Create a Contract

- This a summary page
- Click **Go to Contract**

Summary of Contract # Contract-DOP-PO-000045

Open Main Document

Header	
Contract Name ★	Golf Cart DOP
Contract Type	Purchase Order
Work Group ★	Idaho Division of Purchasing
First Party ★	State of Idaho
Second Party ★	Bubba's Test Co
Contract Status	–
Summary	*No Text Entered*

Dates And Renewal	
Start Date	–
Update Start Date Upon Execution	✖
End Date	–

Contract Managers	
Forrest Benedict	Forrest.Benedict@adm.idaho.gov +1 208-332-1616

> Additional Details

> Request Data

> Attachments

> Visibility

> Comments

★ Required

1 Go to Contract Close

How to Create a Contract

- Fill out all mandatory items
- Fill out all items on **Request Data** – This is how you will populate the printout with the proper information
- Make sure you add the contract value under **Value**

Documents
Contracts
Suppliers
Sourcing
Reporting
Administer
Setup

Contracts > Contracts > Search Contracts > Contract Header

Checked out To You
Type: Purchase Order
2nd Party: Bubba's Test Co
Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: 0.00 USD

Open Main Document

Summary
Header
Product Items 1
Alternative Language 0
Attachments 7
Obligations 0
Review Rounds 0
Submit for Approval
Comments 0
Communication Center 0
Users and Contacts
Notifications
Contract Family

Contract Number * Contract-DOP-PO-000045
Parent Contract Type to filter...
Contract Name * Golf Cart DOP
Contract Status
Contract Type * Purchase Order
Show on Supplier Portal Yes / No / Inherit From General Contract Settings -- Current Setting: No
Work Group * Idaho Division of Purchasing
Value 0.00
Summary *No Text Entered* Edit Summary

- **Enter this contract amount**

Contract Parties Add Party

Name	Currently Visible	Type	Contact	Contract Address	
State of Idaho		First Party (Primary)	-	-	Actions
Bubba's Test Co	✘	Second Party (Primary)	-	-	Actions

Dates and Renewal

Time Zone * MDT/MST - Mountain Standard Time (US/M
Renewals Remaining
Start Date * mm/dd/yyyy hh:mm a
Renewal Term
Update Start Date Upon Execution
End Date * Expires On / No Expiration
mm/dd/yyyy hh:mm a
Review Date mm/dd/yyyy hh:mm a
Review Term
Reviews Remaining

Additional Details

Request Data

- **Cont.**

Do Not Dispatch Hold Yes / No
General Instructions
2000 characters remaining
Payment Method
Payment Terms
Purchase/CO Dispatch Yes / No
Received by Type
Service End Date mm/dd/yyyy
Service Start Date mm/dd/yyyy
ShipDtl - FOB
ShpDtl - Instructions
ShpDtl - Shipping Method
ShpDtl- Delivery Date mm/dd/yyyy
Supplemental Data
2000 characters remaining

How to Create a Contract

- Update Line item if needed

Contract-DOP-PO-000045
Golf Cart DOP

Checked out To You
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Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: **0.00 USD**

Open Main Document

Summary
Header
Product Items 1
Alternative Language 0
Attachments 7
Obligations 0
Review Rounds 0
Submit for Approval

Comments 0
Communication Center 0
Users and Contacts
Notifications
Contract Family

Product Items

View XML | History | ?

Items (1)

Add New Item

Actions for Selected Items

Name *	Description	Est. Unit Price	Qty	UOM	Estimated Delivery Date	Total Price	From Sourcing	
Wheels	Mag	–	1	EA - Each	6/5/2019	36520	✔	Actions

< Previous Next >

How to Create a Contract

- **Not Used**

Draft | Once done authoring, reviewing, and negotiating this contract, submit it for approval. | Contract Actions

Contract-DOP-PO-000045
Golf Cart DOP

Checked out To You
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Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: **0.00 USD**

Open Main Document

- Summary
- Header
- Product Items 1
- **Alternative Language** 0
- Attachments 7
- Obligations 0
- Review Rounds 0
- Submit for Approval
- Comments 0
- Communication Center 0
- Users and Contacts
- Notifications
- Contract Family

Alternative Language

View XML | History | ?

No alternative languages were found on the contract at this time.

< Previous | Save Progress | Next >

How to Create a Contract

- Delete attachments not need
- Upload documents our update attachments
- Uses Version control

Contract-DOP-PO-000045
Golf Cart DOP

Checked out To You
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Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: 0.00 USD

Open Main Document

- Summary
- Header
- Product Items 1
- Alternative Language 0
- **Attachments** 7
- Obligations 0
- Review Rounds 0
- Submit for Approval
- Comments 0
- Communication Center 0
- Users and Contacts
- Notifications
- Contract Family

Attachments

View XML | History | ?

General (7) | Obligations (0)

Add Attachments

Main Document

1-7 of 7 Results — 10 Per Page

Print Order	Attachment	Print with Full Contract	Version	Size	Date Uploaded	
1	Main Document 2019-04-29 ContractTemplate-1556559751055-1002971 - Purchase Order (version 1).docx	✓	1	29 KB	5/21/2019 8:17:48 PM	Actions
2	appendix a Scope of Work.docx	✗	1	15 KB	5/21/2019 8:17:48 PM	Actions
3	Scope Document RFQ Scope Document.docx	✗	1	12 KB	5/21/2019 8:17:49 PM	
4	8.1 project lead Attachment 5 Cost Proposal.docx	✗	1	16 KB	5/21/2019 8:17:49 PM	
5	Price Sheet RFQ price sheet.docx	✗	1	14 KB	5/21/2019 8:17:49 PM	Actions
6	Signature Page Signature-Page-RFQ.pdf	✗	1	190 KB	5/21/2019 8:17:49 PM	Actions
7	Track ATTACHMENT+4+–+COVER+FORM.docx	✗	1	17 KB	5/21/2019 8:17:49 PM	Actions

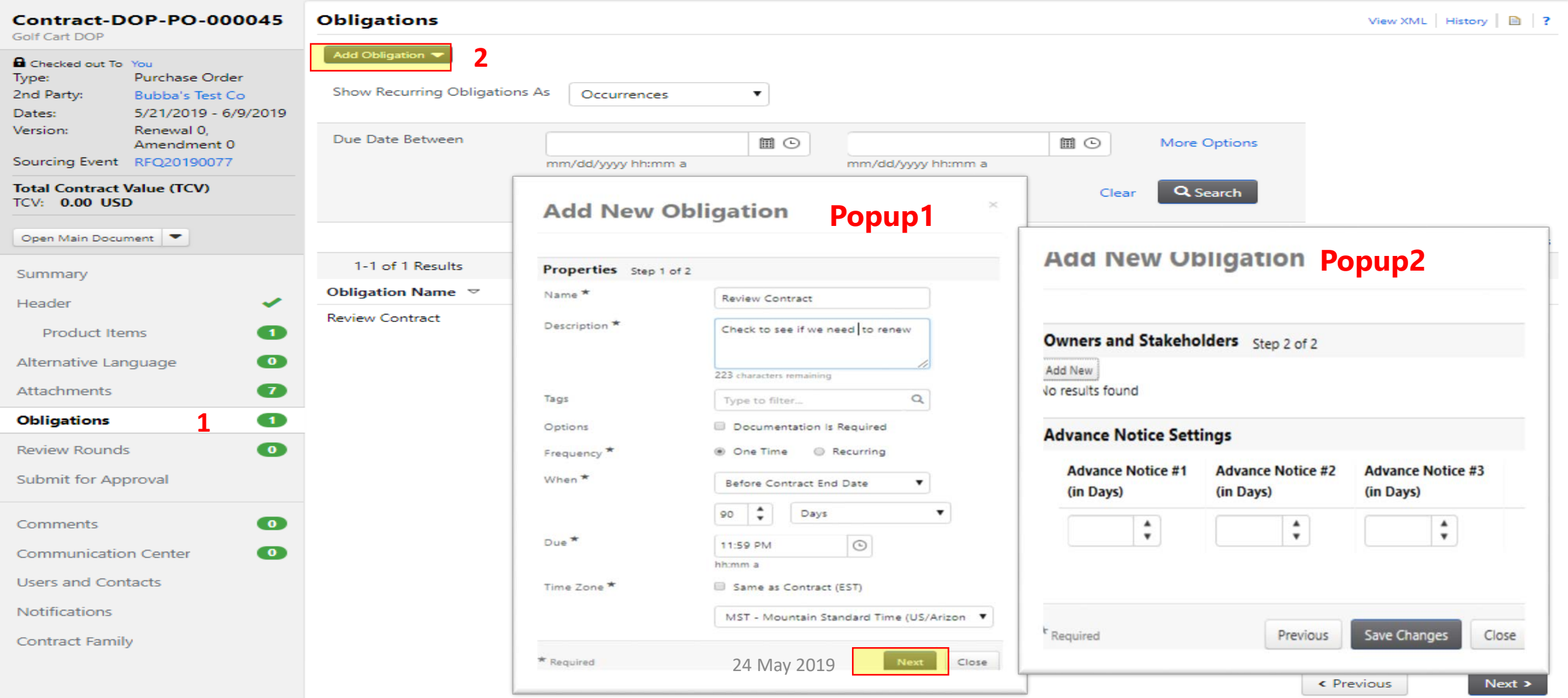
Actions:
- Edit Properties
- Download
- Upload New Version
- Replace as Main Document
- Delete

1-7 of 7 Results — 10 Per Page

< Previous | Next >

How to Create a Contract

- Add obligations
  - Can include reviewing document
- Click **Add Obligation**
- Fill out information on popup



How to Create a Contract

- Can perform a contract review with multiple rounds of internal and external review and comments.

Contract-DOP-PO-000045
Golf Cart DOP

Checked out To You
Type: Purchase Order
2nd Party: Bubba's Test Co
Dates: 5/21/2019 - 6/9/2019
Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: **0.00 USD**

Open Main Document

Summary
Header
Product Items 1
Alternative Language 0
Attachments 7
Obligations 1
Review Rounds 1 0
Submit for Approval
Comments 0
Communication Center 0
Users and Contacts
Notifications
Contract Family

Review Rounds

View XML | History | ?

Automated Internal Review is not applicable for this contract

This contract has 0 completed rounds of review.

Create Manual Internal Round Start External Round

View Automated Internal Review Steps

Show skipped steps
Orientation Horizontal

Submitted Future — *Finish*

< Previous Next >

How to Create a Contract

Contract-DOP-PO-000045
Golf Cart DOP

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2nd Party: Bubba's Test Co
Dates: 5/21/2019 - 6/9/2019
Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: **0.00 USD**

Open Main Document

- Summary
- Header ✔
  - Product Items 1
- Alternative Language 0
- Attachments 7
- Obligations 1
- Review Rounds 1
- **Submit for Approval** 1
- Comments 0
- Communication Center 0
- Users and Contacts
- Notifications
- Contract Family

Submit for Approval

View XML | History | ?

✔ All sections are complete. You may submit your contract for approval.

Section	Progress
Header	✔ Required Fields Complete
Review Rounds	1 Required Fields Complete

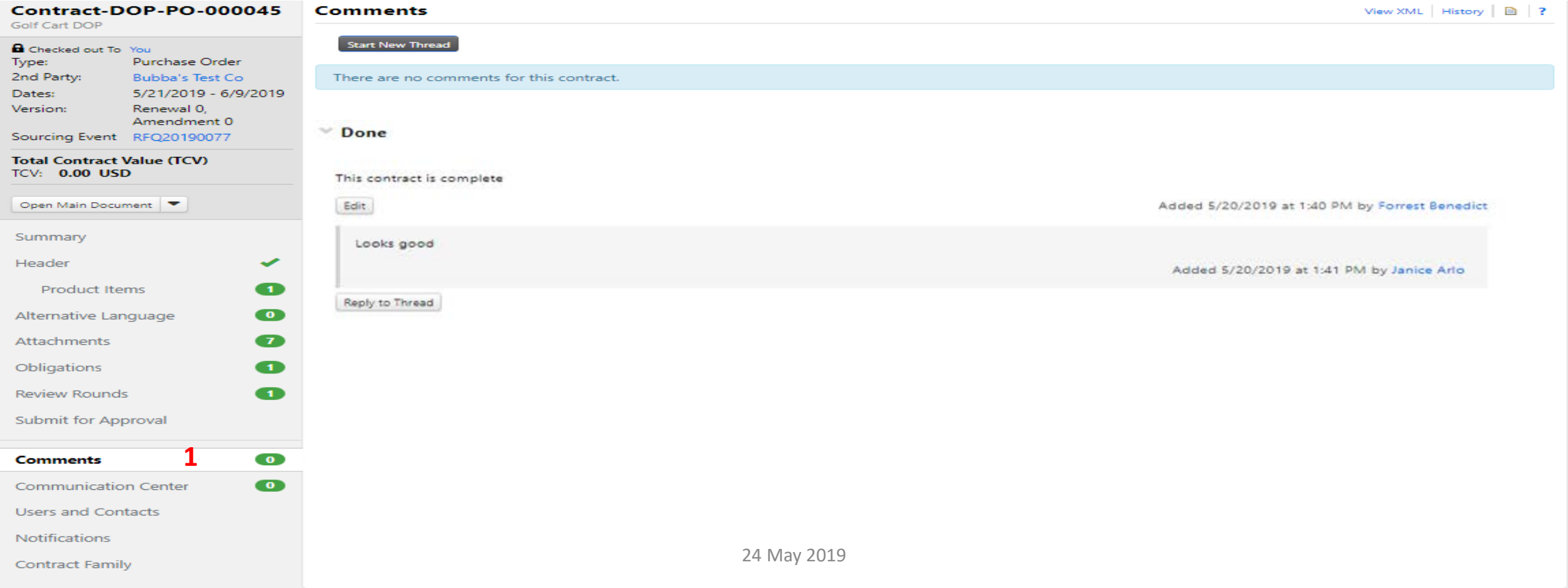
View Approval Steps

< Previous

2 Submit for Approval

How to Create a Contract

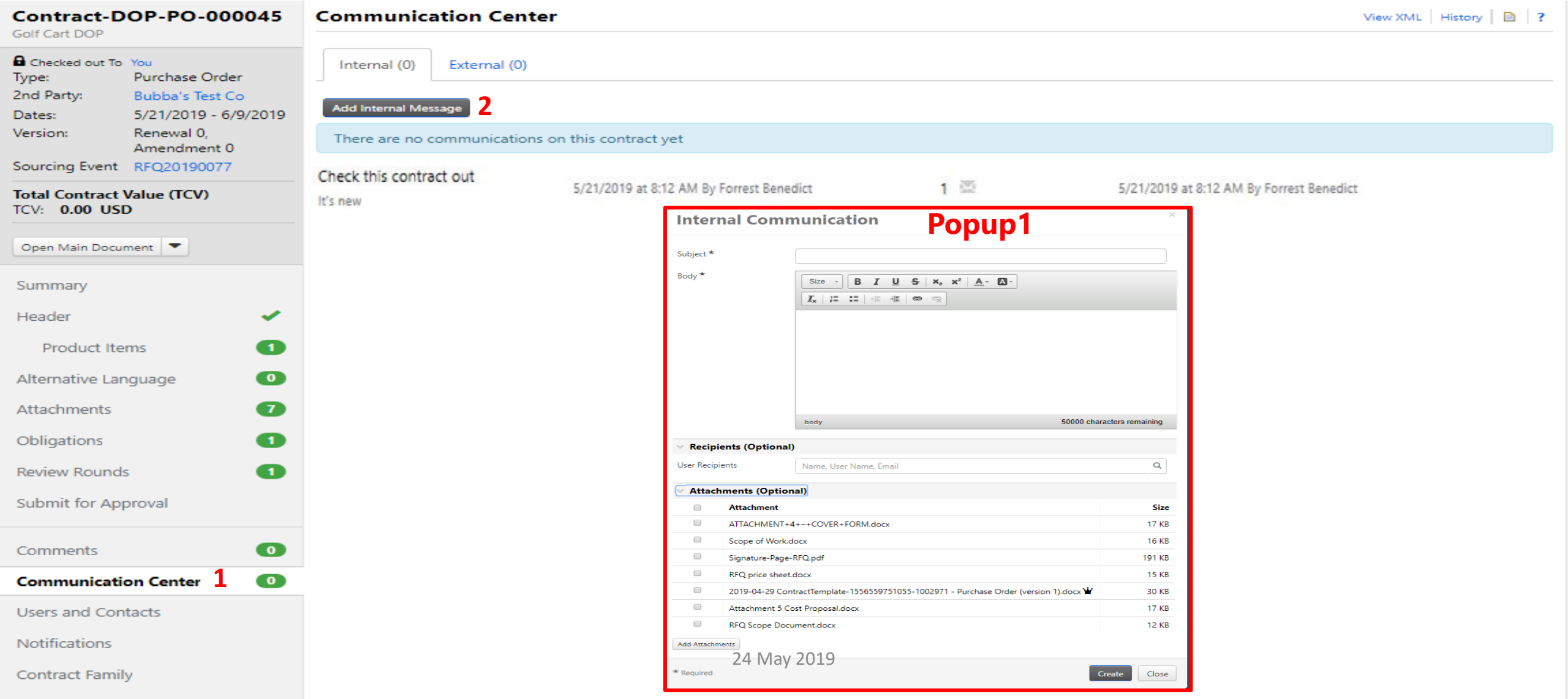
- Comments/replies
- Must add an email address every time you reply



How to Create a Contract

- Used to monitor email correspondence about a contract from one central location
- Internal
  - Users with Jaggaer profiles
- External
  - Users outside of Jaggaer

NOTE: Any email correspondence about this contract will be conducted using this tool



How to Create a Contract

Contract-DOP-PO-000045
Golf Cart DOP

Checked out To You
Type: Purchase Order
2nd Party: Bubba's Test Co
Dates: 5/21/2019 - 6/9/2019
Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: **0.00 USD**

Open Main Document

- Summary
- Header ✓
  - Product Items 1
- Alternative Language 0
- Attachments 7
- Obligations 1
- Review Rounds 1
- Submit for Approval
- Comments 0
- Communication Center 0
- **Users and Contacts** 1
- Notifications
- Contract Family

Users and Contacts

View XML | History | ?

Contract Managers ★ — Full control over this contract — Edit Users
Benedict, Forrest

Stakeholders — View this contract and receive notifications — Edit Users
None

Users from Work Group (11) — Make Confidential

Visibility Controls

External Contacts

You can use External Contacts to document contact information and send other parties email notifications. To manage these contacts, go to Edit External Contacts.

External Contacts — Added directly to this contract: Add Contacts
None

Inherited on all contracts for this supplier
None

★ Required

Save Changes

How to Create a Contract

- Select the type of notifications each user will receive

Contract-DOP-PO-000045
Golf Cart DOP

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Version: Renewal 0, Amendment 0
Sourcing Event RFQ20190077

Total Contract Value (TCV)
TCV: **0.00 USD**

Open Main Document

- Summary
- Header ✓
  - Product Items 1
- Alternative Language 0
- Attachments 7
- Obligations 1
- Review Rounds 1
- Submit for Approval
- Comments 0
- Communication Center 0
- Users and Contacts
- **Notifications** 1
- Contract Family

Notifications

View XML | History | ?

Who should receive each notification type?

Notification Type	Contract Managers		Stakeholders		External Contacts
	Contract	Work Group	Contract	Work Group	
	☐	☐	☐	☐	☐
Start Date - Advance Notice	☐	☐	☐	☐	☐
Start Date Passed	☐	☐	☐	☐	☐
End Date - Advance Notices	☐	☐	☐	☐	☐
End Date Passed	☐	☐	☐	☐	☐
Renewal Date - Advance Notices	☐	☐	☐	☐	☐
Renewal Date Passed	☐	☐	☐	☐	☐
Review Date Passed	☐	☐	☐	☐	☐

Advance Notice Settings

Leave a field blank to turn off that advance notice.

Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date			
End Date			
Renewal Date			

Sourcing Event Advance Notice

Provide the Event Owner Advance Notice for the Contract End Date (in Days)

Save Changes

- This section shows the contract family
- Click on the symbol to view the contract and attachments

Contract-DOP-PO-000045
Golf Cart DOP

Checked out To You
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Dates: 5/21/2019 - 6/9/2019
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Sourcing Event RFQ20190077

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TCV: **0.00 USD**

Open Main Document

Summary
Header
Product Items 1
Alternative Language 0
Attachments 7
Obligations 1
Review Rounds 1
Submit for Approval

Comments 0
Communication Center 0
Users and Contacts
Notifications
Contract Family 1

Contract Family

View XML | History | ?

Link a Child to this Contract

This contract does not have a parent or any children.

Contract-DOP-PO-000045 Contract Versions (1)

All of the following contracts are in Mountain Standard Time.

Status	Version Type		Version Numbers	Value	Primary Second Party	Start Date	End Date	Create Date
Draft	Original		Renewal 0, Amendment 0	0.00	Bubba's Test Co	5/21/2019	6/9/2019	5/21/2019

Helps

- If you see this world icon-suppler responded to a public request Nano Small (Sales)
- If file is too big, try to zip it
- System Timeout – 15 min warning, 1 hour logout