# Procurement Contracts Checklist

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| --- | --- |
|  | Creating Contract |
|  | Assign a Contract Number |
|  | Choose Purchase Order from contract process |
|  | Enter Contract Type |
|  | Vendor ID |
|  | Begin and End Dates |
|  |  Uncheck Corporate Contract Check Box |
|  |  Max Amount |
|  | Price can be changed on order |
|  | Description |
|  | PO Defaults: Buyer, payment terms and charge by |
|  | OPM Reporting: Approval #, Contract Entity and Statutory Reference |
|  | Line: Description, UOM and Category |
|  | Description populated the PO Reference Field when copying to PO |
|  | Line Details: Physical nature, transaction item description and expand all |
|  | Pricing Information: Use Contract Base Price, Price can be changed, order by amount only |
|  |  Distributions: Coding |
|  |  Save |
|  |  Approve Contract |
|  |  |
|  | Copy an Existing Contract to a Contract |
|  | Contract Type |
|  | Begin and End Dates |
|  | PO Defaults: Charge by amount only |
|  | OPM Reporting: OPM Approval #, Contracted Entity and Statutory Reference |
|  | Verify Description, UOM and Category |
|  | Enter the Merchandise Amount in the Line Details |
|  | Distribution: Update coding add additional lines |
|  | Save |
|  |  |
|  | Copy a Contract to a PO |
|  | Search for Contract |
|  | Header Details: PO Type |
|  | Line Details: Purchasing Authority = Contracts |
|  | Attributes: Physical nature = services, amount only, check receiving required |
|  | Total PO Obligation |
|  | Enter start and end dates |
|  | Verify the Dollar Amount on PO |
|  | Schedules: Distribution – verify figures |