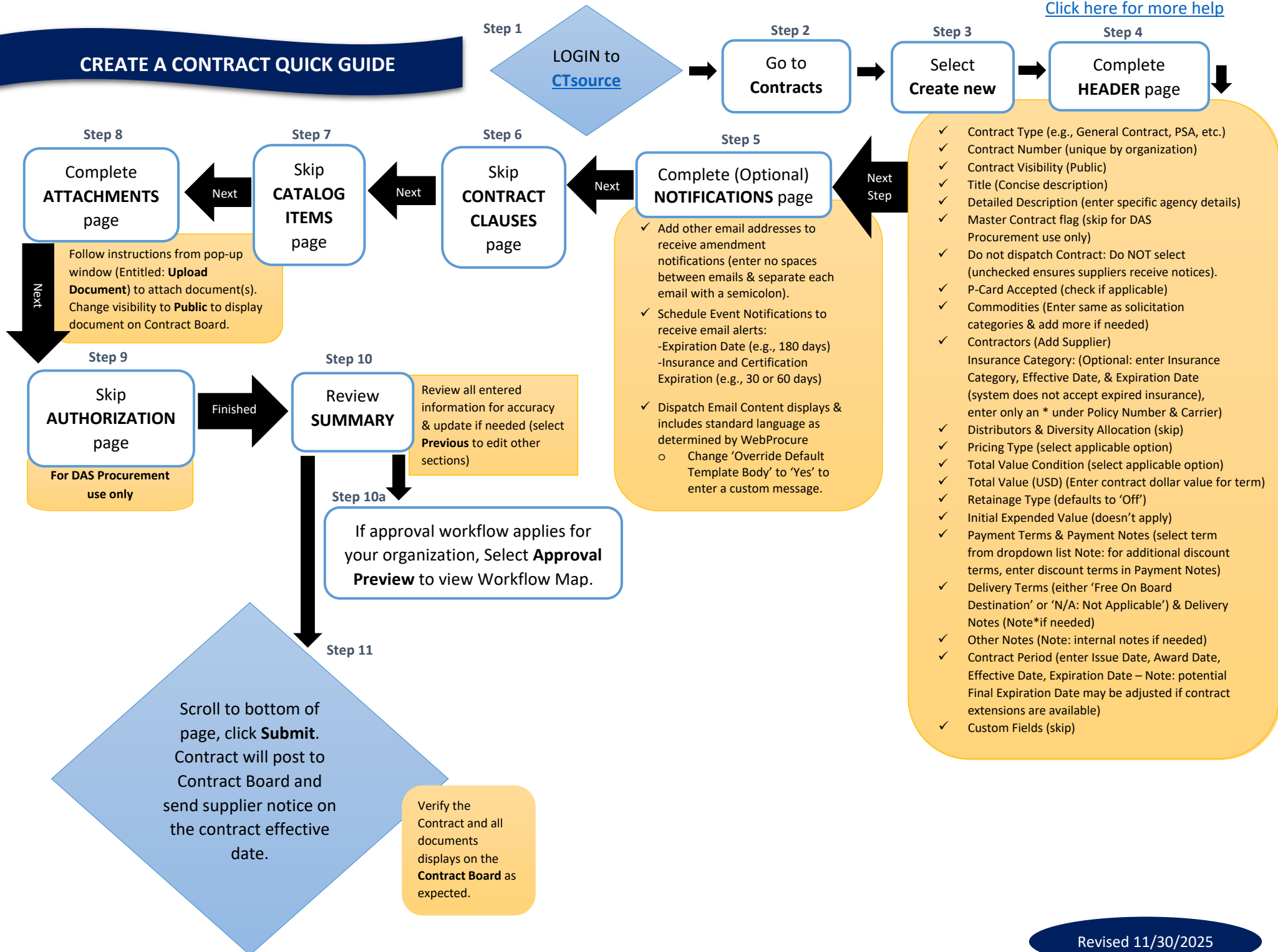
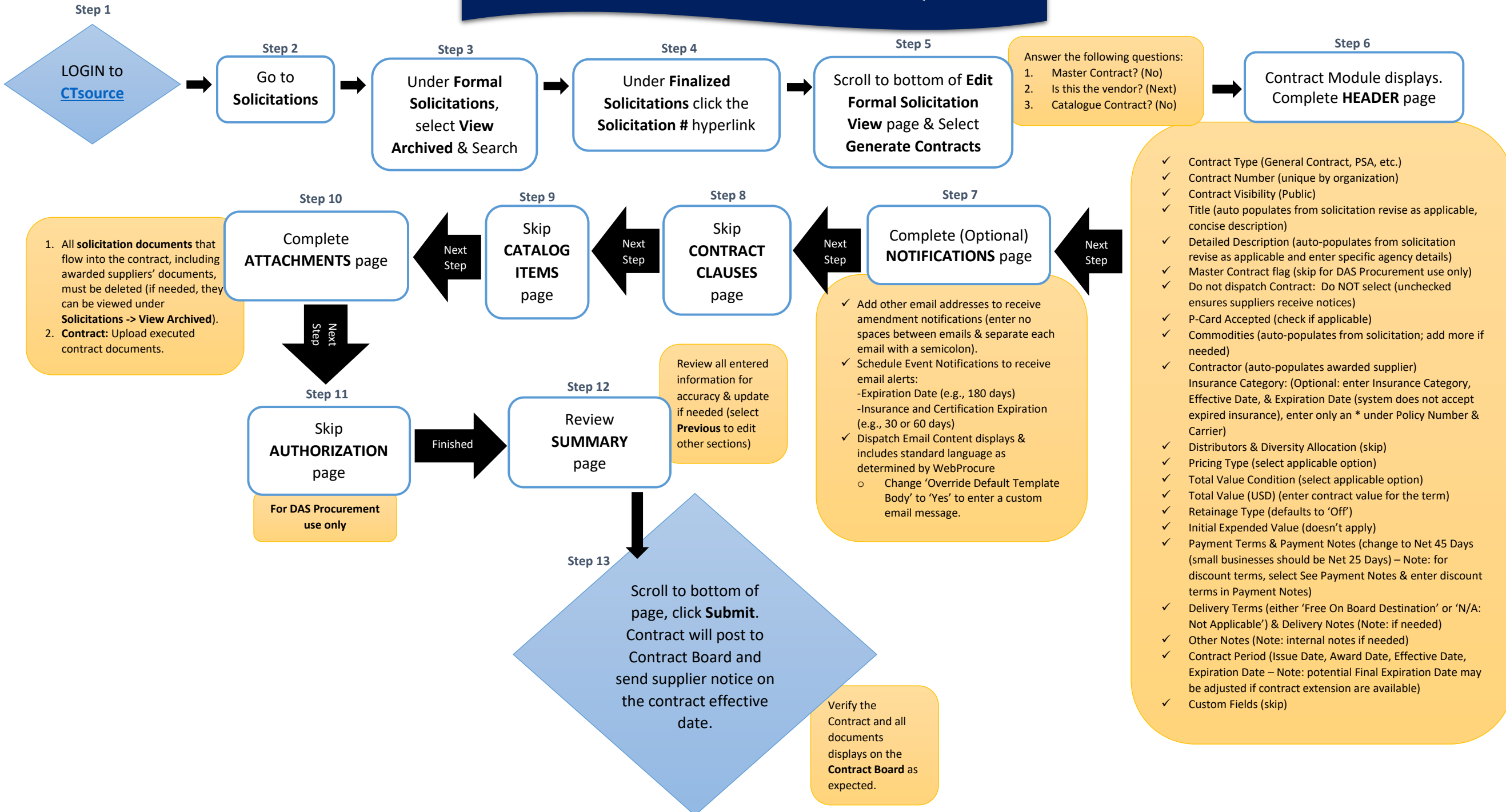


CREATE A CONTRACT QUICK GUIDE



- ✓ Contract Type (e.g., General Contract, PSA, etc.)
- ✓ Contract Number (unique by organization)
- ✓ Contract Visibility (Public)
- ✓ Title (Concise description)
- ✓ Detailed Description (enter specific agency details)
- ✓ Master Contract flag (skip for DAS Procurement use only)
- ✓ Do not dispatch Contract: Do NOT select (unchecked ensures suppliers receive notices).
- ✓ P-Card Accepted (check if applicable)
- ✓ Commodities (Enter same as solicitation categories & add more if needed)
- ✓ Contractors (Add Supplier)
 - Insurance Category: (Optional: enter Insurance Category, Effective Date, & Expiration Date (system does not accept expired insurance), enter only an * under Policy Number & Carrier)
- ✓ Distributors & Diversity Allocation (skip)
- ✓ Pricing Type (select applicable option)
- ✓ Total Value Condition (select applicable option)
- ✓ Total Value (USD) (Enter contract dollar value for term)
- ✓ Retainage Type (defaults to 'Off')
- ✓ Initial Expended Value (doesn't apply)
- ✓ Payment Terms & Payment Notes (select term from dropdown list Note: for additional discount terms, enter discount terms in Payment Notes)
- ✓ Delivery Terms (either 'Free On Board Destination' or 'N/A: Not Applicable') & Delivery Notes (Note*if needed)
- ✓ Other Notes (Note: internal notes if needed)
- ✓ Contract Period (enter Issue Date, Award Date, Effective Date, Expiration Date – Note: potential Final Expiration Date may be adjusted if contract extensions are available)
- ✓ Custom Fields (skip)

CREATE A CONTRACT FROM SOLICITATION AWARD QUICK GUIDE



Answer the following questions:

1. Master Contract? (No)
2. Is this the vendor? (Next)
3. Catalogue Contract? (No)

1. All **solicitation documents** that flow into the contract, including awarded suppliers' documents, must be deleted (if needed, they can be viewed under **Solicitations -> View Archived**).
2. **Contract:** Upload executed contract documents.

- ✓ Add other email addresses to receive amendment notifications (enter no spaces between emails & separate each email with a semicolon).
- ✓ Schedule Event Notifications to receive email alerts:
 - Expiration Date (e.g., 180 days)
 - Insurance and Certification Expiration (e.g., 30 or 60 days)
- ✓ Dispatch Email Content displays & includes standard language as determined by WebProcure
 - o Change 'Override Default Template Body' to 'Yes' to enter a custom email message.

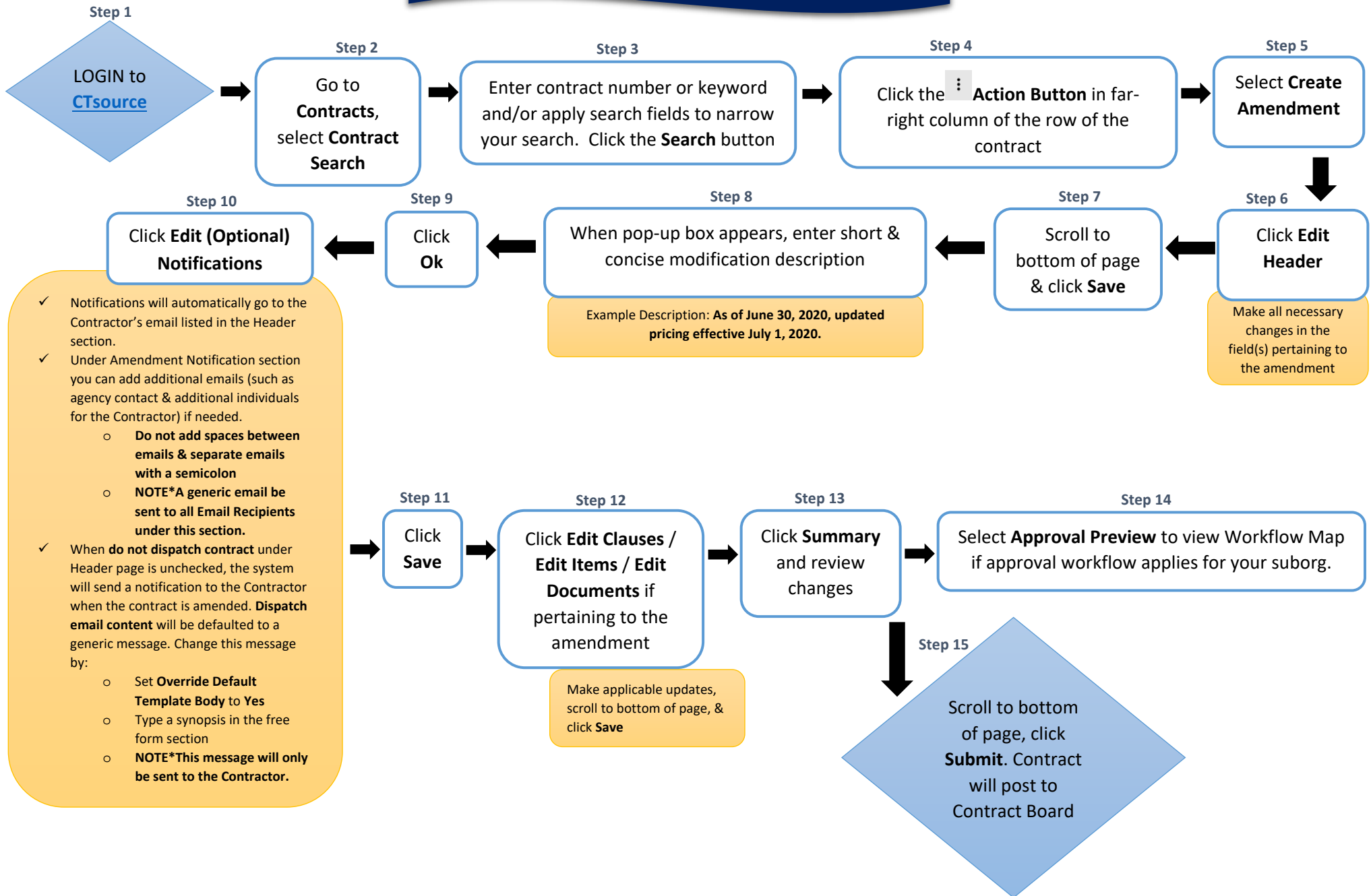
- ✓ Contract Type (General Contract, PSA, etc.)
- ✓ Contract Number (unique by organization)
- ✓ Contract Visibility (Public)
- ✓ Title (auto populates from solicitation revise as applicable, concise description)
- ✓ Detailed Description (auto-populates from solicitation revise as applicable and enter specific agency details)
- ✓ Master Contract flag (skip for DAS Procurement use only)
- ✓ Do not dispatch Contract: Do NOT select (unchecked ensures suppliers receive notices)
- ✓ P-Card Accepted (check if applicable)
- ✓ Commodities (auto-populates from solicitation; add more if needed)
- ✓ Contractor (auto-populates awarded supplier)
Insurance Category: (Optional: enter Insurance Category, Effective Date, & Expiration Date (system does not accept expired insurance), enter only an * under Policy Number & Carrier)
- ✓ Distributors & Diversity Allocation (skip)
- ✓ Pricing Type (select applicable option)
- ✓ Total Value Condition (select applicable option)
- ✓ Total Value (USD) (enter contract value for the term)
- ✓ Retainage Type (defaults to 'Off')
- ✓ Initial Expended Value (doesn't apply)
- ✓ Payment Terms & Payment Notes (change to Net 45 Days (small businesses should be Net 25 Days) – Note: for discount terms, select See Payment Notes & enter discount terms in Payment Notes)
- ✓ Delivery Terms (either 'Free On Board Destination' or 'N/A: Not Applicable') & Delivery Notes (Note: if needed)
- ✓ Other Notes (Note: internal notes if needed)
- ✓ Contract Period (Issue Date, Award Date, Effective Date, Expiration Date – Note: potential Final Expiration Date may be adjusted if contract extension are available)
- ✓ Custom Fields (skip)

Review all entered information for accuracy & update if needed (select **Previous** to edit other sections)

Verify the Contract and all documents displays on the **Contract Board** as expected.

CREATE A CONTRACT AMENDMENT QUICK GUIDE

[Click here for more help](#)



- ✓ Notifications will automatically go to the Contractor's email listed in the Header section.
- ✓ Under Amendment Notification section you can add additional emails (such as agency contact & additional individuals for the Contractor) if needed.
 - Do not add spaces between emails & separate emails with a semicolon
 - NOTE*A generic email be sent to all Email Recipients under this section.
- ✓ When do not dispatch contract under Header page is unchecked, the system will send a notification to the Contractor when the contract is amended. Dispatch email content will be defaulted to a generic message. Change this message by:
 - Set **Override Default Template Body** to **Yes**
 - Type a synopsis in the free form section
 - NOTE*This message will only be sent to the Contractor.

HOW TO APPROVE A SUPPLIER QUICK GUIDE

[Click here for more help](#)

