



Maximo Contracts

GOMaximo Event

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Unlocking potential.
Achieving results.

Training Agenda

- **Maximo 7.6 Contracts**
 - **Master**
 - *Create Associated Contract*
 - **Purchase Contract**
 - *Price Contract*
 - *Blanket Contract*
 - *Associate Sites*
 - *Associate Commodity Group & Code*
 - *Associate SLAs*
 - *Apply Price Adjustment*
 - *Change Line Status*
 - *Revise Contract*
 - *View Revision History*
 - *Create Release PO*
 - *View Release PO*
 - *Schedule Payment*

Training Agenda

- **Warranty**
 - *Associate Asset*
 - *Manage Payments*
- **Terms & Conditions**
 - *Create Ts & Cs*
- **KPIs**
 - *Contract Metrics*

Master Contract



Master Contract

- Master Contracts application
- You use the Master Contracts application to associate different types of contracts for the same vendor. A master contract defines the vendor relationship that applies to the contracts associated with that vendor.
- In the Master Contracts application, you can manage vendor contracts, list properties that are associated with the contract, list the children contracts that are linked or associated to a master contract, and associate terms and conditions with a contract.
- Master contracts can have one or more associated contracts and can contain multiples of a particular type of contract.

Master Contract Header

The master contract is non-transactional, but it does provide a place to have many different kinds of contracts for a given vendor all in one place. Kind of like a file cabinet in a way and template.

The screenshot shows a software interface for a Master Contract Header. It features a navigation bar with tabs: 'List View', 'Contract', 'Properties', 'Associated Contracts', and 'Terms and Conditions'. The 'Contract' tab is selected. Below the navigation bar, there are several input fields and dropdown menus. The 'Contract' field contains the value '1069'. The 'Type' dropdown is set to 'MASTER'. The 'Status' dropdown is set to 'DRAFT'. The 'Revision' field contains '0'. The 'Organization' dropdown is set to 'EAGLENA'. There is an 'Attachments' icon. Below these fields, there are three expandable sections: 'Details', 'Dates', and 'Costs'. The 'Details' section shows 'Vendor Reference #' and 'Buyer'. The 'Dates' section shows 'Start Date' (3/17/17) and 'End Date'. The 'Costs' section shows 'Total Cost' (0.00) and 'Total Base Cost' (0.00). The 'Currency' dropdown is set to 'USD'. There is also a 'Renewal Date' field.

- **Contract field**, this field can be auto populated, or it can remain manual entry.
- **Description field**, there is a 100 character field on the purchase contract.
- **Revision Number**, Revision number of the contract. This number indicates the number of times the contract has been revised. A contract that has been created and not revised will show a number of 0.
- **Revision Description**, Comments associated with the current revision of this contract.
- **Type**, default Master.
- **Status**, default to DRAFT when creating a new contract.
- **Vendor Reference #**, this field provides a place to enter a unique identifier for the vendor.
- **Buyer**, this field can be configured to show only buyers as a option.
- **Start Date**, this is the date when the contract will become active, this can be a future date.
- **End Date**, this is the date when the contract will become inactive.
- **Renewal Date**, this a reminder date that should be in advance of the end date so you have time to renew the contract if desired.
- **Total Cost**, The sum of all the costs on the contract lines on the current master contract.
- **Currency**, this is the base default, but it may change once the vendor is added, depending on country the vendor is located in.
- **Total Base Cost**, Cost of the entire contract in base currency 1.

Master Contract Header – Continued

Vendor

Company:	<input type="text"/>	Freight Terms:	<input type="text"/>
Address:	<input type="text"/>	FOB Point:	<input type="text"/>
City:	<input type="text"/>	Ship Via:	<input type="text"/>
State/Province:	<input type="text"/>	Payment Terms:	<input type="text"/>
ZIP/Postal Code:	<input type="text"/>	Expiration Date of Insurance:	<input type="text"/>
Contact:	<input type="text"/>	Pay Tax to Vendor?	<input type="checkbox"/>
Phone:	<input type="text"/>	Inspection Required?	<input type="checkbox"/>
Customer #:	<input type="text"/>		

- **Company**, this is the vendor field when the vendor is added the address, City, State/Province, Zip/Postal Code, and Contact will populate if the vendor records have been entered properly.
- **Customer #**, The unique number issued by the vendor to identify our company.
- **Freight Terms**, This field allow the buyer to set the agreed upon terms related to shipping and receiving associated with this contract. +
- **F.O.B.**, This field points to which merchandise is on board a vehicle and in transit.
- **Ship Via**, This field points to the name of the shipping company to use for transporting items associated with this contract.
- **Payment Terms**, This field points to the agreed upon terms related to monetary payments associated with this contract.
- **Expiration Date of Insurance**, The expiration date of liability insurance for the vendor.
- **Pay Tax to Vendor**, If this field is checked the tax associated with a transaction for this contract will be paid to the vendor. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract.
- **Inspection Required**, If this flag is set the all the release PO's lines associated with this contract will require inspection at the time of receipt. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract. This setting it to make all lines on the contract inspection required, because it is a vendor setting.

Master Contract Properties

The screenshot shows a software interface for editing a Master Contract. At the top, there are tabs for 'List View', 'Contract', 'Properties', 'Associated Contracts', and 'Terms and Conditions'. The 'Properties' tab is active. Below the tabs, there are several input fields for contract details: Contract ID (1042), Contract Name (MASTER CONTRACT TEST), Type (MASTER), Status (DRAFT), Revision (0), Organization (EAGLENA), and Total Cost (0.00). Below these fields is a section titled 'Properties' containing a grid of checkboxes and input fields for various contract terms: Extendable?, Acceptance Period, Vendor Termination Allowed?, Condition for Extension, Acceptance Loss?, Vendor Notification Period, Extension Period, Shipping Loss?, Customer Termination Allowed?, and Customer Notification Period. The 'Extendable?' checkbox is checked, and the 'Vendor Termination Allowed?' and 'Customer Termination Allowed?' checkboxes are also checked.

- **Extendable**, Checking this box indicates the contract is extendable.
- **Condition for Extension**, Details any conditions that may exist for an extension.
- **Extension Period**, If the contract is extendable, this field indicates the auto extend period in days.
- **Acceptance Period**, Amount of time in days that can pass before the buyer must either accept the received items or return them.
- **Acceptance Loss**, Checking this box indicates you are liable for acceptance loss.
- **Shipping Loss**, Is the Buyer liable for losses incurred during shipment?
- **Vendor Termination Allowed**, Early termination allowed by vendor.
- **Vendor Notification Period**, If early termination is allowed by vendor, this indicates the notice of termination in days.
- **Customer Termination Allowed**, Checking this box indicates that early termination by the customer is allowed.
- **Customer Notification Period**, Customer notification period in days.

Master Contract Associated Contracts

Contract: 1049 MASTER CONTRACT TEST Type: MASTER Status: APPR
Revision: 0 Organization: EAGLENA Total Cost: 0.00

Associated Contracts 1 - 8 of 8

Contract	Revision	Description	Contract Type	Status
1051	>> 0	PRICE TEST	PRICE	DRAFT
1056	>> 0	SERVICE TEST	SERVICE	DRAFT
1052	>> 0	PURCHASE TEST	PURCHASE	DRAFT
1057	>> 0	WARRANTY TEST	WARRANTY	DRAFT
1055	>> 0	RENTAL TEST	RENTAL	DRAFT
1050	>> 0	BLANKET TEST	BLANKET	DRAFT
1053	>> 0	LABOR RATE TEST	LABOR	DRAFT
1054	>> 0	LEASE TEST	LEASE	DRAFT

- **Contract field**, this field can be auto populated, or it can remain manual entry.
- **Description field**, there is a 100 character field on the purchase contract.
- **Revision Number**, Revision number of the contract. This number indicates the number of times the contract has been revised. A contract that has been created and not revised will show a number of 0.
- **Revision Description**, Comments associated with the current revision of this contract.
- **Type**, default Master.
- **Status**, default to DRAFT when creating a new contract.

Master Contract Ts. & Cs.

Contract: 1049 MASTER CONTRACT TEST Type: MASTER Status: APPR
Revision: 0 Organization: EAGLENA Total Cost: 0.00

Sequence	Term	Description	Send to Vendor?
There are no rows to display.			

Select Terms New Row

Contract: 1043 TESTING Type: PURCHASE Status: DRAFT
Revision: 0 Organization: EAGLENA Total Cost: 3,565.00

Sequence	Term	Description	Send to Vendor?
10	ACKNGMINTA	ACKNOWLEDGMENT AND ACCEPTANCE	<input checked="" type="checkbox"/>

Details

Sequence: 10
Term: ACKNGMINTA ACKNOWLEDGMENT AND ACCEPTANCE OF ORDER
Send to Vendor?

Select Terms New Row

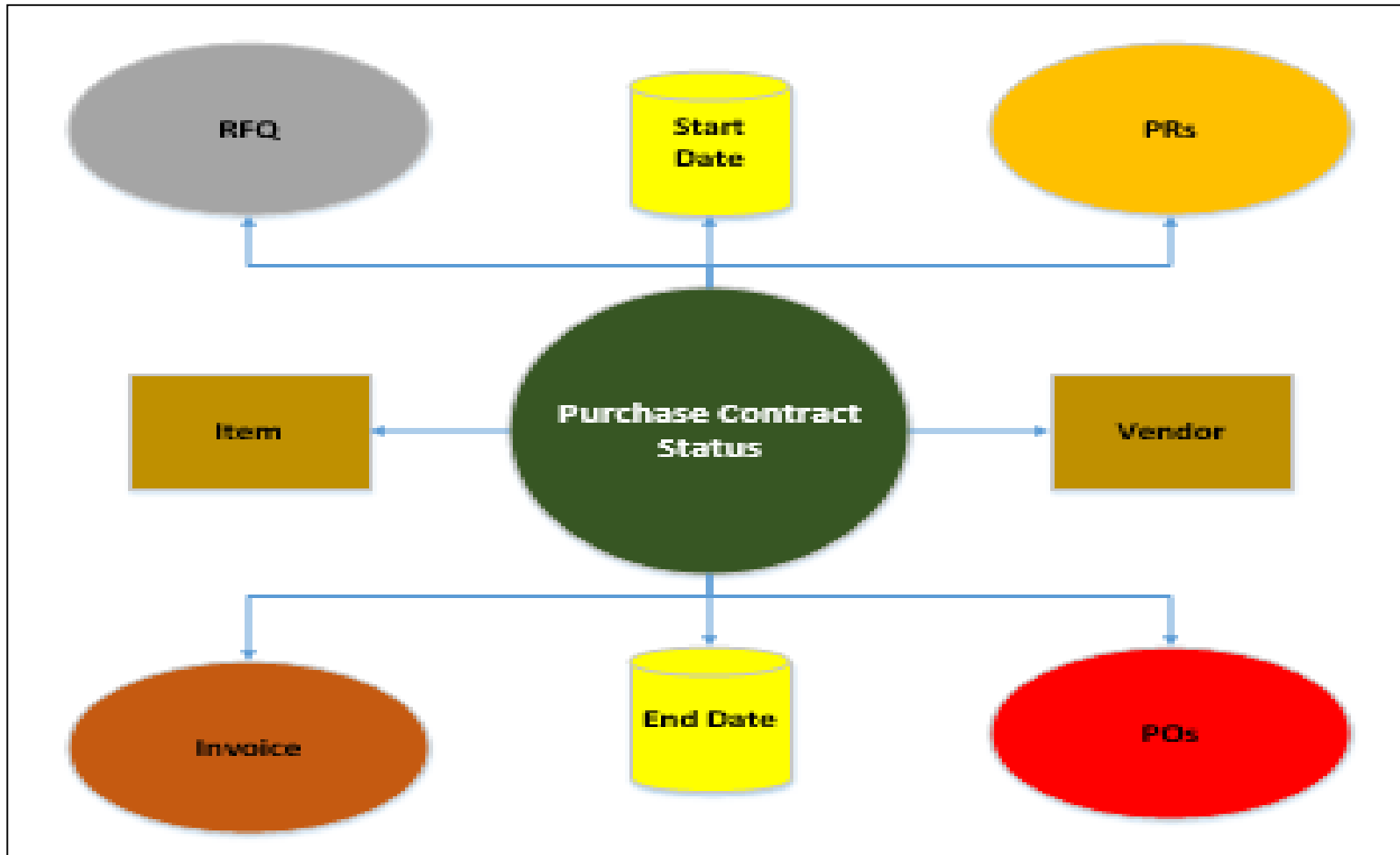
- **New Row**, allows you to add from an existing list of payment term one at a time.
- **Select Terms**, Allows you to select from a list of terms in multiples if desired.

- **Second Screen:**
- **Example:** After clicking new row, you have an option to select a given Terms code that returns to the contract line as shown.

Maximo Contracts



Purchase Contracts/Data Flow



Purchase Contracts

Purchase Contracts application

- You use the Purchase Contracts application to maintain purchase contracts with outside vendors. On the contract, you can specify items or services provided and their costs, shipping and handling, expected delivery times, financial terms, and vendor information.
- You can create the following types of purchase contract's:
- **Blanket contract** - A blanket contract is an agreement to spend a predetermined amount with the specified vendor over a period of time. The blanket has a budget amount that is required. Release type POs are created from blanket contract.
- **Price contract** - A price contract specifies that items or services purchased from the specified vendor over a period of time are provided at an agreed-upon price. Standard PO are created and the price contract reference number, contract type, and contract revision number are associated with the PR or PO lines. Note: The standard PO is not created from the price contract it is only associated when the item is placed on a PR or PO line.
- **Purchase contract** - A purchase contract is an agreement to purchase items or services at an agreed-upon price with a vendor. To create this type of contract, you must have a purchase order that does not specify a maximum amount. The purchase contract has the ability to be setup like a blanket or a price contract based on the properties selected. So it will either have a release PO created from within like a blanket, or it will be like a price contract. It must be one or the other, it can't be setup to do both at the same time.
- Before you can approve a contract in the purchase contract suite, you must have at least **one authorized site**.

Purchase Contracts

- 1) One of the first things to do when creating a contract is to select the type.
- 2) Next enter the description.
- 3) Select the buyer.
- 4) Set the end date.

The screenshot displays a software interface for creating a purchase contract. At the top, there are navigation tabs: "List View", "Contract", "Properties", "Contract Lines", and "Terms and Conditions". The "Contract" tab is selected.

Key fields and sections include:

- Contract:** ID: 1055, Revision: [empty]
- Type:** PURCHASE
- Status:** DRAFT
- Attachments:** [icon]
- Details:** Master Contract: [empty], Vendor Reference #: [empty], Buyer: [empty]
- Dates:** Start Date: 8/23/15, End Date: [empty], Renewal Date: [empty]
- Costs:** Currency: USD, Maximum Amount: [empty], Maximum Release Amount: [empty]
- Vendor:** Company: [empty], Address: [empty], City: [empty], State/Province: [empty], ZIP/Postal Code: [empty], Contact: [empty], Phone: [empty], Customer #: [empty]
- Freight Terms:** [empty]
- FOB Point:** [empty]
- Ship Via:** [empty]
- Payment Terms:** [empty]
- Pay Tax to Vendor?** [checkbox]
- Inspection Required?** [checkbox]

Purchase Contract Header

The screenshot shows a web-based form for creating a purchase contract. At the top, there are tabs for 'List View', 'Contract', 'Properties', 'Contract Lines', and 'Terms and Conditions'. The 'Contract' tab is active. Below the tabs, there are input fields for 'Contract' (containing '1052'), 'Revision' (containing '0'), 'Type' (a dropdown menu set to 'PURCHASE'), and 'Status' (a dropdown menu set to 'DRAFT'). There is also an 'Attachments' icon. Below this, there are three expandable sections: 'Details', 'Dates', and 'Costs'. The 'Details' section contains fields for 'Master Contract', 'Vendor Reference #', and 'Buyer'. The 'Dates' section contains 'Start Date' (8/23/15), 'End Date', and 'Renewal Date'. The 'Costs' section contains 'Currency' (USD), 'Maximum Amount', and 'Maximum Release Amount'. At the bottom, there is a 'Vendor' section with fields for 'Company', 'Address', 'City', 'State/Province', 'ZIP/Postal Code', 'Contact', 'Phone', 'Customer #', 'Freight Terms', 'FOB Point', 'Ship Via', 'Payment Terms', 'Pay Tax to Vendor?' (checkbox), and 'Inspection Required?' (checkbox).

- **Contract field**, this field can be auto populated, or it can remain manual entry.
- **Description field**, there is a 100 character field on the purchase contract.
- **Type**, multiple select, **Purchase**, Blanket, and Price.
- **Status**, default to DRAFT when creating a new contract.
- **Master Contract**, if the contract is created within a master contract there will be a master contract reference number in this field.
- **Vendor Reference #**, this field provides a place to enter a unique identifier for the vendor.
- **Buyer**, this field can be configured to show only buyers as a option.
- **Start Date**, this is the date when the contract will become active, this can be a future date.
- **End Date**, this is the date when the contract will become inactive.
- **Renewal Date**, this a reminder date that should be in advance of the end date so you have time to renew the contract if desired.
- **Currency**, this is the base default, but it may change once the vendor is added, depending on country the vendor is located in.
- **Maximum Amount**, this field can be configured as a control point on a purchase contract if desired. There are no controls on this field on a purchase contract out of box.
- **Maximum Release Amount**: this field can be configured as a control point on a the maximum spend for each release that is created from the purchase contract if desired. There are no controls on this field on a purchase contract out of box.
- **Company**, this is the vendor field when the vendor is added the address, City, State/Province, Zip/Postal Code, and Contact will populate if the vendor records have been entered properly.
- **Freight Terms**, This field allow the buyer to set the agreed upon terms related to shipping and receiving associated with this contract. +
- **F.O.B.**, This field points to which merchandise is on board a vehicle and in transit.
- **Ship Via**, This field points to the name of the shipping company to use for transporting items associated with this contract.
- **Payment Terms**, This field points to the agreed upon terms related to monetary payments associated with this contract.
- **Pay Tax to Vendor**, If this field is checked the tax associated with a transaction for this contract will be paid to the vendor. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract.
- **Inspection Required**, If this flag is set the all the release PO's lines associated with this contract will require inspection at the time of receipt. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract. This setting it to make all lines on the contract inspection required, because it is a vendor setting.

Purchase Contract Properties

Contract:

 Type:
 Status:

Revision:

 Total Cost:

Properties

Requires PO?	Extendable?	Acceptance Period:	Vendor Termination Allowed?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Create Release?	Conditions for Extension:	Acceptance Loss?	Vendor Notification Period:
<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Can Exceed Amount?	Extension Period:	Shipping Loss?	Customer Termination Allowed?
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Schedule?		Customer Notification Period:	<input type="text"/>
<input type="checkbox"/>			
Add Lines on Use?			
<input type="checkbox"/>			
Maintain Hierarchy?			
<input type="checkbox"/>			

- All the fields below can be configured to default a desired value as a starting point when creating the contract:*
- Required PO**, Checking this box indicates a PO is required for this contract.
- Create Release**, Checking this box indicates you can create a release from the contract.
- Can Exceed Amount**, Checking this box indicates you can exceed the specified maximum amount on this contract.
- Payment Schedule**, Checking this box indicates a that there is a defined payment schedule.
- Add Lines on Use**, Checking this box indicates you can add lines to the purchase document with contract reference.
- Maintain Hierarchy**, Checking this box allow you to maintain hierarchy's associated with rotating items that are on the contract lines of this contract.
- Extendable**, Checking this box indicates the contract is extendable.
- Condition for Extension**, Details any conditions that may exist for an extension.
- Extension Period**, If the contract is extendable, this field indicates the auto extend period in days driven from the condition if associated with the contract.
- Acceptance Period**, Amount of time in days that can pass before the buyer must either accept the received items or return them.
- Acceptance Loss**, Checking this box indicates you are liable for acceptance loss.
- Shipping Loss**, Checking this box indicates you are liable for shipping loss.
- Vendor Termination Allowed**, Checking this box indicates that early termination is allowed by vendor.
- Vendor Notification Period**, If early termination is allowed by vendor, this indicates the notice of termination in days.
- Customer Termination Allowed**, Checking this box indicates that early termination by the customer is allowed.
- Customer Notification Period**, If early termination by the customer is allowed this is the customer notification period in days.

Purchase Contract Lines

Contract: 1043 Type: PURCHASE Status: DRAFT

Revision: 0 Total Cost: 0.00

Contract Lines Filter > 0 - 0 of 0

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
There are no rows to display.							

Payment Schedule Vendor Items New Row

- **New Row**, Clicking this button will add a contract line the contract.
- **Vendor Items**, Clicking this button will all buyer to select the lines that are associated with the vendor on the header of the contract. A single or multiple lines can be returned to the contract.
- **Payment Schedule**, If the schedule payment option is selected on the properties tab, then a schedule payment can be setup.

Purchase Contract Lines - continued

[List View](#) | [Contract](#) | [Properties](#) | **[Contract Lines](#)** | [Terms and Conditions](#)

Contract: 1043 TESTING * Type: PURCHASE Status: DRAFT
 Revision: 0 Total Cost: 3,565.00

Contract Lines [Filter](#) 1 - 2 of 2

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	SERVICE		SERVICE TEST LINE	1.00	HOURS	65.00	65.00
2	STDSERV	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00

Line Item

Line: 1 Commodity Group: Manufacturer:
 Line Type: Service Commodity Code: Model:
 Item: SERVICE TEST LINE Condition Code: Catalog #:

Quantity and Costs	Details	Properties
Quantity: 1.00 Order Unit: HOURS Unit Cost: 65.00 Line Cost: 65.00	Status: DRAFT Entered By: JUORDAN Entered Date: 9/13/17 9:26 AM Remarks:	Change Quantity on Use? <input type="checkbox"/> Change Price on Use? <input checked="" type="checkbox"/> Payment Schedule? <input checked="" type="checkbox"/> Inspection Required? <input type="checkbox"/>

[Payment Schedule](#) [Vendor Items](#) [New Row](#)

- **Line**, The number of associated with an individual contract line.
- **Line Type**, A code that indicates the type of item listed on the line. The value of line type could be Item, Material, Service, Special Order or External Catalog Item.
- **Item**, A unique identifier for the item.
- **Item Description**, A written description of the entity on the contract line.
- **Commodity Group**, The commodity group in which the line item is listed.
- **Commodity Code**, A unique code indicating the type of commodity on the line.
- **Condition Code**, A code indicating a condition for the item rotated out of service and into a storeroom.
- **Manufacture**, Unique code indicating the manufacturer of the item listed on the contract line.
- **Model**, The vendor's unique identification number for an item.
- **Catalog**, A unique code for cataloging an item.
- **Quantity**, The number of an item ordered on this line.
- **Order Unit**, Indicates the physical characteristics of a unit. A unit can be each, box, roll, linear feet, cubic feet, square feet etc.
- **Unit Cost**, The monetary value associated with an ordered unit.
- **Line Cost**, The sum of the unit cost multiplied by the order quantity.
- **Status**, Indicates the status of the Contract Line. Could be one of Draft, Approved, Cancel and Waiting for Approval.
- **Entered By**, The name of the logged in user who entered the line item.
- **Entered Date**, The on which the line item was entered.
- **Remarks**, Comments about the individual line or line item.
- **Delivery Time**, The number of days between the order date and the delivery date.
- **Change Quantity on Use**, Checking this box indicates you can change the quantity on the line with contract reference.
- **Change Price on Use**, Checking this box indicates you can change the price on the line with contract reference.
- **Payment Schedule**, Checking this box indicates the line has a payment schedule associated with it. This happens by default if you created a payment schedule for the line.
- **Inspection Required**, Indicates whether inspection of line item is required upon receipt. **Reminder**, this setting is line item specific on the contract line. If an item is flagged as inspection required at the item level, this setting will default from the item master.

Purchase Contract – Payment Schedule

Payment Schedule

Item:

Schedule Lines **Filter** > 0 - 0 of 0

Schedule Line	Action	Payment Percent	Line Cost	Days Interval	Target Invoice Status
There are no rows to display.					

Invoices **Filter** > 0 - 0 of 0

Invoice	PO	Invoice Total	Entered Date	Due Date	Status
There are no rows to display.					

Payment Schedule

Item:

Schedule Lines **Filter** > 1 - 1 of 1

Schedule Line	Action	Payment Percent	Line Cost	Days Interval	Target Invoice Status
1	RECEIPT	100.00	65.00	7	WAPPR

Details

Schedule Line: 1

Days Interval: 7

Line Cost: 65.00

Payment Percent: 100.00

* Action:

* Target Invoice Status:

Invoices **Filter** > 0 - 0 of 0

Invoice	PO	Invoice Total	Entered Date	Due Date	Status
There are no rows to display.					

- **Payment Schedule**, click New Row to create a payment schedule for the lines. **Reminder**, payment schedules are setup line specific so you can have multiple lines and only have a payment schedule for a given line if desired.
- Second Screen Setting up the payment Schedule:
- **Days Interval**, Time passed between action and payment.
- **Line Cost**, the line cost default from the contract line if desired.
- **Payment Percent**, Percentage to be paid at this time.
- **Action**, that triggers this payment (POAPPR, RECEIPT, INSPECT).
- **Target Invoice Date**, The invoice created in a Entered (WAPPR) or Approved (APPR) status?
- **Invoice**, the invoice number that was created against the scheduled payment
- **PO**, the PO number created and used for the invoice payment.
- **Invoice Total**, the total amount of the invoice payment based on the payment percentage plus possible carrying costs.
- **Entered Date**, the date the invoice was created or entered.
- **Due Date**, payment due, based on the payment terms and days interval.
- **Status**, shows the current invoice status.
- **Schedule Payments, create an Invoice Type** of "SCHED", (Maximo understands this invoice type, and the only way to create and invoice type of SCHED is via schedule payment from a contract. Most payment systems do not recognize this type of invoice . As a result it is common to change the "SCHED" type invoice to "INVOICE" before it passes through the interface to remove the problem.

Purchase Contracts – Selecting Payment Terms

The screenshot shows the 'Terms and Conditions' screen for a purchase contract. The contract number is 1043, the type is PURCHASE, and the status is DRAFT. The total cost is 3,565.00. The table below the header has columns for Sequence, Term, Description, and Send to Vendor?. The table is currently empty, displaying the message 'There are no rows to display.' Buttons for 'Select Terms' and 'New Row' are visible at the bottom.

The screenshot shows the 'Terms and Conditions' screen with one row selected. The row has Sequence 10, Term ACKNMINTA, and Description ACKNOWLEDGMENT AND ACCEPTANCE. The 'Send to Vendor?' checkbox is checked. A 'Details' section below the table shows the selected row's data: Sequence 10, Term ACKNMINTA, and Description ACKNOWLEDGMENT AND ACCEPTANCE OF ORDER. The 'Send to Vendor?' checkbox is also checked in the details section. Buttons for 'Select Terms' and 'New Row' are visible at the bottom.

- **New Row**, allows you to add from an existing list of payment term one at a time.
- **Select Terms**, Allows you to select from a list of terms in multiples if desired.
- Second Screen:
- **Example:** After clicking new row, you have an option to select a given Terms code that returns to the contract line as shown.

Purchase Contract - Managing Payment Terms

The screenshot shows the 'Terms and Conditions' application interface. On the left is a navigation sidebar with options like 'Go To Applications', 'Available Queries', 'All Records', 'Common Actions', 'Save Terms and Conditions', 'Clear Changes', and 'More Actions'. The main area is divided into two sections: 'Organizations' and 'Terms and Conditions for EAGLENA'.

Organizations Table:

Organization	Description
EAGLENA	EAGLE Inc. North America
EAGLESA	Eagle South America, Inc.
EAGLEUK	European Headquarters of Eagle, Inc.
POOKSITE	The coolest place on earth
JASONORG	Jason Training Org

Terms and Conditions for EAGLENA Table:

Term	Description	Type	Editable?	Default on PO?
ACKNOINT	ACKNOWLEDGMENT AND ACCEPTANCE	PURCH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ASSIGNM	ASSIGNMENT/SUBCONTRACTING	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUYERSPR	BUYER'S PROPERTY IN SELLER'S POSI	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CANCELLA	CANCELLATIONS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CHANGES	CHANGES/AMENDMENTS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
COMPLIAN	COMPLIANCE WITH LAWS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONDUCT	STANDARDS OF CONDUCT	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
CONTRCTL	LAW OF THE CONTRACT	CONTRACT	<input type="checkbox"/>	<input type="checkbox"/>
FORCEMAJ	DELIVERY/FORCE MAJEURE	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
INDEINITY	INDEINITY	PURCH	<input type="checkbox"/>	<input type="checkbox"/>

- **Navigations:** Contract – Term & Conditions
- **New Row,** This allow you to create a new Terms and Conditions code or manage an existing Terms and Condition Code.
- **Terms,** Identifies the term or condition. This value must be unique for all terms.
- **Description,** Describes the term or condition. To enter or view additional information, click the Long Description button.
- **Type,** Identifies the type of term or condition. The type is user-defined.
- **Editable,** Specifies whether the term can be edited when accessed from other applications. If the check box is selected, users can edit the term when accessed from other applications. If the checkbox is cleared (the default), users cannot edit the term in other applications.
- **Default on PO,** Specifies whether the term will appear on new POs by default. If the check box is selected, the term will appear as a default term on new POs. If the checkbox is cleared, the term will not appear by default on new POs.

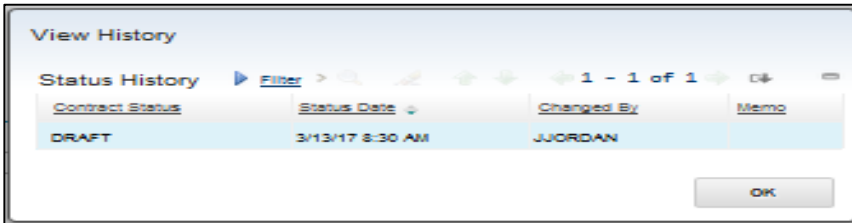
The screenshot shows the 'Terms and Conditions' application interface with a detailed view of a term for EAGLENA. The 'Organizations' list is visible at the top. Below it is the 'Terms and Conditions for EAGLENA' table, which is filtered to show a single row for 'ASSIGNM'.

Terms and Conditions for EAGLENA Table (Filtered):

Term	Description	Type	Editable?	Default on PO?
ASSIGNM	ASSIGNMENT/SUBCONTRACTING	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below the table is a 'Details' section with input fields for 'Term', 'Type', 'Editable?', and 'Default on PO?'. The 'Term' field contains 'ASSIGNM', 'Type' is empty, 'Editable?' has a checked checkbox, and 'Default on PO?' has an unchecked checkbox. A 'New Row' button is located at the bottom right.

Contract – More Actions



The screenshot shows a 'View History' dialog box with a table of contract status changes. The table has four columns: 'Contract Status', 'Status Date', 'Changed By', and 'Memo'. There is one row of data showing the status as 'DRAFT', the date as '3/13/17 8:30 AM', and the user as 'JJORDAN'. An 'OK' button is located at the bottom right of the dialog box.

Contract Status	Status Date	Changed By	Memo
DRAFT	3/13/17 8:30 AM	JJORDAN	

- View History, This allow you to see all the history associated with the status changes of the contract.

Contract – More Action - Copy Lines from PRs

Copy PR Lines To Contract

PR Line Items Filter 1 - 15 of 42

<input type="checkbox"/> PR	Company	Item	Description	Quantity	Unit Cost	Requested By	Required Date	Status	Copy to Contract?
<input type="checkbox"/>	1004	BEK	0-7205 Valve, Needle- 1/4 in	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	217213 Plate, Stainless Steel	2.00	7.59	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	231177 Guide- Carton Machine	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	335029 Hub- 2 in Die	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	570-72 Valve, Needle- 2M-V4IN	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	6-L203 Tee, Steel, Male Thread- 1/2 in	2.00	3.79	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	900810 Lubricator Assembly	1.00	3.79	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	G23117 Carton Guide- Chain Wash Machine	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1005	GST	X0IP-3000 Gasket- E330	2.00	1.10	LIBERI	2/7/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1005	GST	X00X-1500 Guard, For Gast Pump- AC-683	1.00	6.00	LIBERI	2/7/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1006	ATI	217213 Plate, Stainless Steel	2.00	7.59	LIBERI		APPR	<input type="checkbox"/>
<input type="checkbox"/>	1006	ATI	S84-L0 Lockwasher- 1/2 in	1.00	625.00	LIBERI		APPR	<input type="checkbox"/>
<input type="checkbox"/>	1007		4500-5 PDA (Sales)	50.00	0.00	WILSON	12/8/04	APPR	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1008	DATACHIP	D650 Series II Laptop	2.00	1,950.00	WILSON		WAPPR	<input type="checkbox"/>
<input type="checkbox"/>	1009	DATACHIP	D650 Series II Laptop	3.00	1,950.00	WILSON		WAPPR	<input type="checkbox"/>

- **Copy Lines From PRs**, this give a buyer the option to copy PR lines that exist for the vendor on the contract by using the filter option on the Copy PR lines To Contract screen.

Contract – More Action - Copy Lines from POs

Copy PO Lines To Contract

Filter > 1 - 15 of 170

<input type="checkbox"/>	PO	Revision	Company	Item	Description	Quantity	Storeroom	Work Order	Requested By	Required Date
<input type="checkbox"/>	1005	0	GCE	29331	Building Thermostat	2.00	PKG			7/31/96
<input type="checkbox"/>	1000	0	ATI	560-00	Tubing, Copper-1 in ID X .030 in Wall	3.00	CENTRAL			
<input type="checkbox"/>	1031	0	HELUWIG	PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	1.00	CENTRAL		SMITH	
<input type="checkbox"/>	B4194	0	ATI	117084	Shaft- 1 inch Dia	8.00	CENTRAL		SANTANA	6/3/01
<input type="checkbox"/>	B4230	0	ATI	53-143	V-Belt- 1/2 in, 30 In Circumference	12.00	CENTRAL		SANTANA	9/16/01
<input type="checkbox"/>	1065	0	GOODYEAR	11R22.5G8-5	Goodyear 11R22.5 G327 Steer Tire	40.00	ATLANTA		WILSON	
<input type="checkbox"/>	B4230	0	ATI	117084	Shaft- 1 inch Dia	10.00	CENTRAL		SANTANA	9/16/01
<input type="checkbox"/>	1026	0	OFFRUIS	231177	Guide- Carton Machine	1.00	CENTRAL		LIBERI	
<input type="checkbox"/>	1009	0	IR	PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	1.00	CENTRAL		WILSON	1/18/97
<input type="checkbox"/>	1021	0	KENNEDY	560-00	Tubing, Copper-1 in ID X .030 in Wall	1.00	CENTRAL		LIBERI	
<input type="checkbox"/>	5197	0	HELUWIG	11453	Seal, Mechanical, Self Aligning- 1 in ID	1.00	CENTRAL		LIBERI	10/25/95
<input type="checkbox"/>	1061	0	DATACHIP	D650	Series II Laptop	15.00	HARDWARE		WILSON	10/6/04
<input type="checkbox"/>	1062	0	COMPDEP	ANTIVIRUS	Antivirus software	50.00	SOFTWARE		WILSON	10/12/04
<input type="checkbox"/>	A3312	0	GST	XMP-7000	Rotor And Shaft- AW508, 3 in Dia	5.00	CENTRAL		SANTANA	5/13/01
<input type="checkbox"/>	A3249	0	GST	XMP-3500	Cylinder, Hydraulic- AA267	5.00	CENTRAL		SANTANA	11/29/00

OK Cancel

- **Copy Lines From POs**, this give a buyer the option to copy PO lines that exist for the vendor on the contract by using the filter option on the Copy PR lines To Contract screen.

Creating an RFQ from the Contract

Create RFQ

Select line items to be included on the RFQ by selecting the checkbox on the rows or select the checkbox on the header to select all line items. Add the default charge values for the selected lines in the bottom section. Click OK to create the RFQ with the selected line items and return to the contract.

RFQ: 1007 TEST FOR VALLOC

Autonumber

Contract Lines Filter 1 - 3 of 3

<input type="checkbox"/>	Line	Item	Description	Order Unit	Issue Unit	Conversion Factor	Manufacturer	Model	Catalog #
<input type="checkbox"/>	1	VAL103	SERVOIE TEST ITEM	HOURS					SERVICE1
<input type="checkbox"/>	2	VAL101	TEST ITEM 2	EACH					BRD4320
<input type="checkbox"/>	3	VAL100	TEST ITEM 1	EACH					BAC123L

RFQ Charge Values

Work Order: Storeroom: >>>

Location: GL Debit Account: >>>

Asset: Site: BEDFORD

OK Cancel

- **Create RFQ:**
- **RFQ**, A unique identifier for this RFQ.
- **Description**, A brief description of this RFQ.
- **Auto Number**, this button when clicked will auto create the RFQ number.
- **Contract Lines:**
- **Note:** Contract lines must be selected to copy them to the RFQ lines.
- **Contract Lines**, this option allows you to select all line from the contract, or some of the lines from the contract to be copied to the RFQ. If you want all line click the box on the header, but if you only want some of the lines click the box beside the specific lines.
- **Order Units**, Non-persistent field to hold the order unit value
- **Conversion Factor**, the conversion factor should follow the Order Units, it is best to manage changes on the RFQ line so the value select will be persistent.
- **RFQ Change Values:**
- **Work Order**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Location**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Asset**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Storeroom**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **GL Debit Account**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Site**, defaults based on the users default site.
- **OK**, click OK to create the RFQ
- **Cancel**, click cancel to role back and discontinue creation of the RFQ.

Creating an Release PO from the Contract

Create Release PO

To create a release purchase order from the current contract, specify a new PO number manually or use the Autonumber button and optionally specify the PO's description. Select one or more line items to be included on the Release PO by selecting the checkbox on the header to select all line items. Add the default charge values for the selected lines in the bottom section. Click OK to create the Release PO with the selected line items and return to the contract.

PO: 1097

Description: Testing description

Vendor: BURBAW >>

Name: Bursaw Oil Co.

Autonumber

Contract Lines Filter > 1 - 1 of 1

Line	Item	Description	Order Unit	Quantity	Issue Unit	Conversion Factor	Manufacturer	Model	Catalog #
<input checked="" type="checkbox"/>	1	Service Test Line	HOURS	1.00		1.00			

Release Charge Values

Work Order: Storeroom: >>

Location: GL Debit Account: >>

Asset: Site: BEDFORD >>

OK Cancel

- **Create Release PO:** The create release PO must be set on the properties tab of the contract in order to create a release PO.
- **PO,** A unique identifier for this Release PO.
- **Description,** A brief description of this RFQ.
- **Vendor,** this value will default from the contract.
- **Auto Number,** this button when clicked will auto create the Release PO number.
- **Contract Lines:**
 - **Note:** Contract lines must be selected to copy them to the RFQ lines.
 - **Contract Lines,** this option allows you to select all line from the contract, or some of the lines from the contract to be copied to the Release PO Lines. If you want all line click the box on the header, but if you only want some of the lines click the box beside the specific lines.
- **Order Units,** Non-persistent field to hold the order unit value
- **Conversion Factor,** the conversion factor should follow the Order Units, it is best to manage changes on the RFQ line so the value select will be persistent.
- **Release Change Values:**
 - **Work Order,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Location,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Asset,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Storeroom,** if value is entered it will default to the Release PO lines when the PO is created.
 - **GL Debit Account,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Site,** defaults based on the users default site.
- **OK,** click OK to create the Release PO
- **Cancel,** click cancel to role back and discontinue.

Viewing and Managing Release PO's from the contract

View Release Costs

Release Costs

Total Cost: 0.00 Amount on Order: 60.00
Number of Uncommitted Releases: 0 Amount Received: 0.00
Number of Committed Releases: 1 Amount Remaining: -60.00
Uncommitted Cost: 0.00 Invoice Variance: 0.00
Committed Cost: 60.00

Purchase Orders Filter > 1 - 1 of 1

PO	Release #	Description	Site	Ordered Date	Status	Receipts	Total Cost
1096	1	Testing	BEDFORD	2/23/17 12:41 F	APPR	NONE	62.70

OK

- **View Release Costs**, you have the ability to view all Release PO cost and status within the contract.
- **Purchase Orders**, you can click the icon to the right of the PO number field and it will link you to the release PO.
- **OK**, click OK to close the Release PO dialog.
- **Lessons learned:** The only way to create a Release PO is from a contract. If you want release PO to be approved and sent to the vendor as other standard type PO's the Release Type must be include in workflow and e-mail communications.

Viewing and RFQ and PR Lines copied to the Contracts as well as invoice lines.

View RFQ Line Items

RFQ Lines **Filter** > 0 - 0 of 0

Line	RFQ	RFQ Line	Item	Description	Quantity	Unit Cost	Line Cost
There are no rows to display.							

OK

View PR Line Items

PR Lines **Filter** > 0 - 0 of 0

Line	PR	PR Line	Item	Description	Quantity	Unit Cost	Line Cost
There are no rows to display.							

OK

View Invoice Lines

Invoice Lines **Filter** > 1 - 1 of 1

Invoice	Invoice Line	Company	Quantity	Unit Cost	Line Cost
1088	1	BURSAW	1.00	60.00	60.00

OK

- **Frist Screen:**
- **View RFQ Line Items**, If line were add to a contract from and RFQ they can always be view by select view RFQ lines.

- **Second Screen:**
- **View PR Line Items**, If line were add to a contract from and PR they can always be view by select view RFQ lines.

- **Third Screen:**
- **View Invoice Lines**, Invoice lines can be viewed once the invoice has be created.

Purchase Contract Authorize Sites

Authorize Sites

To add a site that is authorized to use this contract use New Row and add an individual site or use Select Sites to select multiple sites simultaneously. If required, modify the default Company and Bill To information for each authorized site. Click OK to authorize the specified sites and return to the contract.

Sites **Filter** > <> <> <> <> <> <> <> <> <> 1 - 1 of 1

Vendor	Site	Organization	Default?	Bill To	Attention
BURSAW	BEDFORD	EAGLENA		BEDFORDM	KATHYB

Select Sites New Row

OK Cancel

- **Authorize Sites**, At least one site must be authorized to change the contract status to APPR.
- **New Row**, click the new row button will all you to select one site at a time.
- **Select Sites**, click the Select Sites button will all you to select multiple sites at once.
- **OK**, clicking OK to add the authorized site or sites.
- **Cancel**, click cancel to roll back and discontinue.

Purchase Contracts and managing commodity groups and Code

Associate Commodities

To associate commodities with this contract use New Row and add an individual commodity or use Select Commodities to select multiple records simultaneously.

Commodity Groups **Filter** > 0 - 0 of 0

Commodity Group	Description	Service?
There are no rows to display.		

Select Commodity Groups New Row

Commodity Codes for Commodity Group **Filter** > 0 - 0 of 0

Commodity Code	Description	Service?
There are no rows to display.		

Select Commodity Codes New Row

OK Cancel

- **Associate Commodities:**
- **New Row**, commodities groups can be associated with the purchase contracts one at a time by selecting the New Row button. Service commodity groups can also be associated.
- **Select Commodity Groups**, multiple commodities groups can be associated with purchase contracts by selecting the Select commodity groups button. Service commodity groups can also be associated.

Associate Commodities

To associate commodities with this contract use New Row and add an individual commodity or use Select Commodities to select multiple records simultaneously.

Commodity Groups **Filter** > 1 - 2 of 2

Commodity Group	Description	Service?
31171500	MOTOR	<input type="checkbox"/>

Details

Commodity Group: 31171500 BEARINGS

Service?

Select Commodity Groups New Row

Commodity Codes for Commodity Group 31171503 **Filter** > 1 - 1 of 1

Commodity Code	Description	Service?
31171503	WHEEL BEARINGS	<input type="checkbox"/>

Select Commodity Codes New Row

OK Cancel

- **Second Screen:**
- **New Row**, commodity codes for the commodity group selected can be added one at a time by clicking New Row.
- **Select Commodity Codes**, multiple commodity codes for the commodity group selected can be added by clicking the select commodity codes button.
- **Ok**, clicking OK will associate the commodity codes with the purchase contract.
- **Cancel**, click cancel to roll back and discontinue.

Purchase Contract SLA's

Associate SLAs

To associate an SLA with this contract use New Row and add an Individual SLA or use Select SLAs to select multiple records simultaneously. Click OK to associate the specified SLAs and return to the contract.

Associate SLAs Filter > 1 - 1 of 1

SLA	Description	Vendor	Start Date	End Date	Type	Status
1024	Vendor Labor Certification Renewal Agreements	DATACHIP	7/1/04 12:00 AM	6/30/06 12:00 AM	VENDOR	ACTIVE

Select SLAs New Row

OK Cancel

- **Associate SLA's:**
- **New Row**, by clicking new row you can select existing SLA's one at a time.
- **Select SLA's**, by clicking Select SLA's you can select multiple existing SLA's.
- **OK**, click OK to add the SLA's selected to the purchase contract.
- **Cancel**, click cancel to roll back and discard.

Purchase Contract Revision

Revise Contract

Enter a description for the revised contract. Click OK when finished.

Contract Reference: 1039

Revision: 1

OK Cancel

View Revision History

Contract Details Filter 1 - 4 of 4

Revision	Status	Company	Start Date	End Date	Maximum Amount	Changed By	Changed Date	Revision Comments
3	APPR	GCE	1/1/04	12/31/05		WILSON	6/29/07 10:24 AM	additional items provided
2	REVISD	GCE	1/1/04	12/31/05		WILSON	6/29/07 10:24 AM	item no longer available - removing from contract
1	REVISD	GCE	1/1/04	12/31/05		WILSON	9/27/04 4:28 PM	4% price increase
0	REVISD	GCE	1/1/04	12/31/05		WILSON	9/23/04 5:01 PM	

Contract Line Details Filter 1 - 8 of 15

Line	Revision	Revision Status	Line Type	Item	Description	Quantity	Unit Cost	Line Cost
10	3	ADDED	ITEM	L-CABLE	Coaxial PVC LAN cable	1.00	4.33	4.33
9	3	CHANGED	ITEM	140-2919 Relay - Main Junction Box		1.00	280.00	280.00
9	2		ITEM	140-2919 Relay - Main Junction Box		1.00	280.00	280.00
8	2		ITEM	134-3124 MOUNTING - GP BATTERY		1.00	29.64	29.64
8	3	CHANGED	ITEM	134-3124 MOUNTING - GP BATTERY		1.00	29.64	29.64
7	3	CHANGED	ITEM	134-3154 MOUNTING GP - JUNCTION BOX		1.00	15.08	15.08
7	2		ITEM	134-3154 MOUNTING GP - JUNCTION BOX		1.00	15.08	15.08
6	2		ITEM	EB12 12 Volt Battery		1.00	16.54	16.54

pk

- **Revise Contract:**
- **Description**, enter a description, there is a long description associated with this field also.
- **OK**, click OK to commit the Revision.
- **Cancel**, click cancel to roll back and discard.

- **Second Screen:**
- **View Revision History**, click view revision history to see the history of all revision associated with the purchase contract.
- **OK**, click OK to close dialog.

Purchase Contract Apply Price Adjustment

Apply Price Adjustment

Select the lines whose price you would like to change. Indicate with a positive or negative percentage, the change that will be applied to the selected lines. Click OK for changes to take affect.

Adjustment %:

Contract Lines Filter 1 - 2 of 2

<input type="checkbox"/>	Line	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost	New Unit Cost	New Line Cost
<input checked="" type="checkbox"/>	1		SERVICE TEST LINE	1.00	HOURS	65.00	65.00		
<input type="checkbox"/>	2	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00		

Apply Price Adjustment

Select the lines whose price you would like to change. Indicate with a positive or negative percentage, the change that will be applied to the selected lines. Click OK for changes to take affect.

Adjustment %:

Contract Lines Filter 1 - 2 of 2

<input type="checkbox"/>	Line	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost	New Unit Cost	New Line Cost
<input checked="" type="checkbox"/>	1		SERVICE TEST LINE	1.00	HOURS	65.00	65.00		
<input type="checkbox"/>	2	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00		

- **Apply Price Adjustment:**
- **Adjustment %**, enter a positive or negative value in the percentage field (**see second screen for negative entry**).
- **Contract Line**, select the line or lines to apply the price change too.
- **OK**, click OK to apply the price change to the selected lines.
- **Cancel**, click cancel to roll back and discard.

Purchas Contract – Change Line Status

Change Line Status

Indicate a new line status to apply to selected contract lines. To select lines, select the checkbox on the rows whose status will be changed. To select all lines, select the checkbox on the header. Click OK to apply the status change and return to the contract.

Line Status:

Contract Lines Filter 1 - 8 of 8

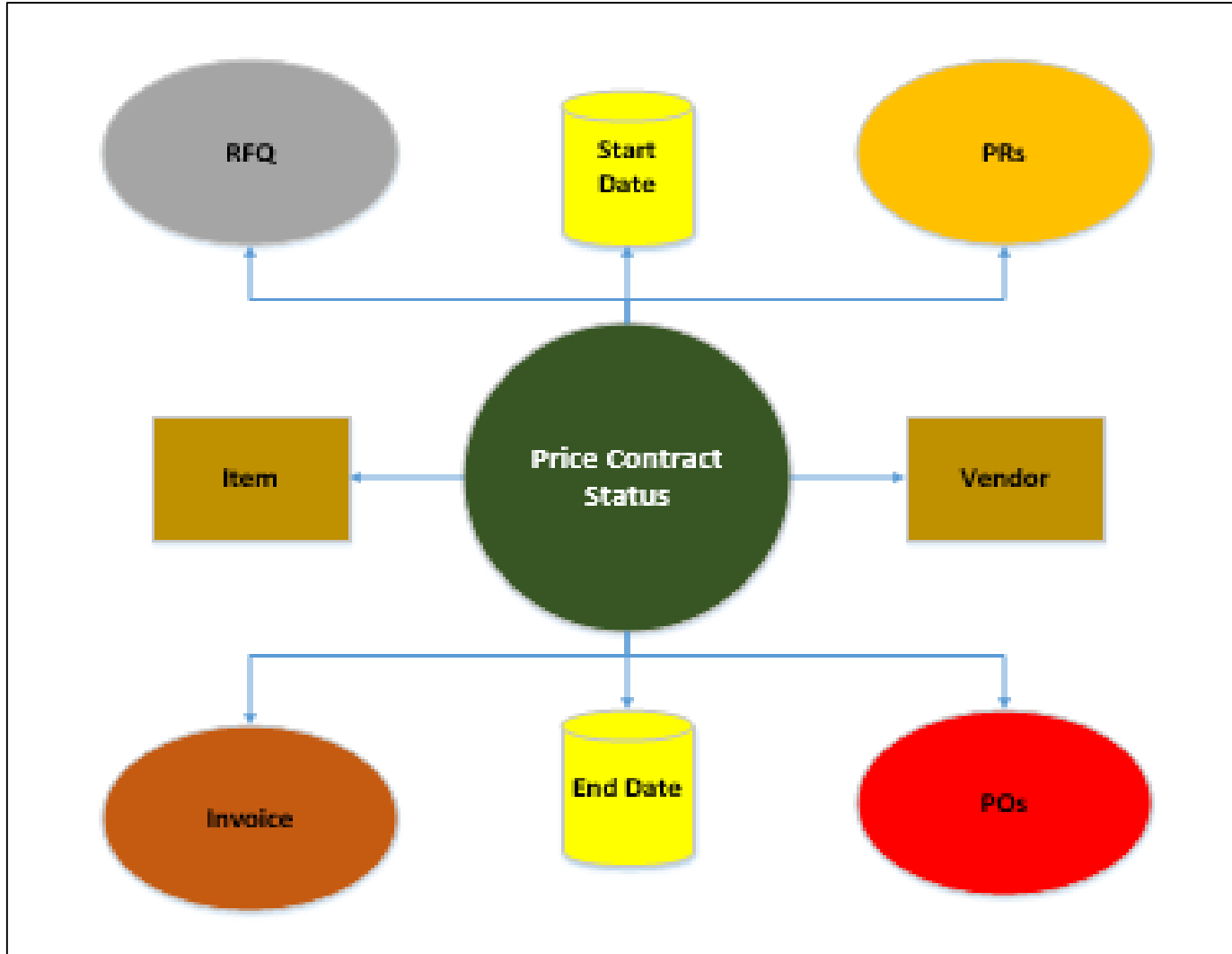
<input type="checkbox"/>	Line	Item	Description	Status
<input checked="" type="checkbox"/>	1	11406	AC Spark Plug	APPR
<input type="checkbox"/>	3	11241	Contact, Renewal Kit	APPR
<input checked="" type="checkbox"/>	4	29331	Building Thermostat	APPR
<input checked="" type="checkbox"/>	6	EB12	12 Volt Battery	APPR
<input type="checkbox"/>	7	134-3154	MOUNTING GP - JUNCTION BOX	APPR
<input type="checkbox"/>	8	134-3124	MOUNTING - GP BATTERY	APPR
<input type="checkbox"/>	9	140-2919	Relay - Main Junction Box	APPR
<input type="checkbox"/>	10	L-CABLE	Coaxial PVC LAN cable	APPR

More Actions

- Create Release PO
- View Release Costs
- View RFQ Line Items
- View PR Line Items
- View Invoice Lines
- Authorize Sites
- Associate Commodities
- Associate SLAs
- Revise Contract
- View Revision History
- Apply Price Adjustment
- Change Line Status
- Unit of Measure and Conversion
- Attachment Library/Folders
- Duplicate Purchase Contract
- Add to Bookmarks

- **Change Line Status:**
 - The purchase contract must be in the status of APPR to use the change line status. This allows to change the status of specific lines without revising the contract.
 - **Line Status**, the domain beside the field allows one to select one of the following line statuses for the contract line APPR, CANCEL, DRAFT, WAPPR.
 - **OK**, Click OK to apply the line status change.
 - **Cancel**, click cancel to roll back and discard.
-
- **Second Screen:**
 - **Units of Measure**, add modify unit of measure and add modify unit of measure conversion can be managed from More Actions
 - **Attachment Library folders**, can be managed from More Actions
 - **Duplicate Purchase Contract**, can be managed from More Actions.
 - **Add to Bookmarks**, can be managed from More Actions.

Price Contract/Data Flow



Price Contract Header

The screenshot shows the 'Price Contract Header' form with the following data:

- Contract:** 1042, TESTING, Type: PRICE, Status: DRAFT
- Revision:** 0
- Details:**
 - Master Contract: [empty]
 - Vendor Reference #: [empty]
 - Buyer: FOUCH
 - Start Date: 8/13/15
 - End Date: 8/13/2016
 - Renewal Date: [empty]
 - Currency: USD
 - Maximum Amount: [empty]
 - Maximum Release Amount: 0.00
- Vendor:**
 - Company: FSC (Franklin Supply Corp)
 - Address: 48 RIDGE ST, WATERTOWN, MA, 02172
 - Freight Terms: [empty]
 - FOB Point: WATERTOWN
 - Ship Via: UPS-GR
 - Payment Terms: 2/15 NET 30
 - Pay Tax to Vendor:
 - Inspection Required?:

- **Contract field**, this field can be auto populated, or it can remain manual entry.
- **Description field**, there is a 100 character field on the purchase contract.
- **Type**, multiple select, Purchase, Blanket, and **Price**.
- **Status**, default to DRAFT when creating a new contract.
- **Master Contract**, if the contract is created within a master contract there will be a master contract reference number in this field.
- **Vendor Reference #**, this field provides a place to enter a unique identifier for the vendor.
- **Buyer**, this field can be configured to show only buyers as a option.
- **Start Date**, this is the date when the contract will become active, this can be a future date.
- **End Date**, this is the date when the contract will become inactive.
- **Renewal Date**, this a reminder date that should be in advance of the end date so you have time to renew the contract if desired.
- **Currency**, this is the base default, but it may change once the vendor is added, depending on country the vendor is located in.
- **Maximum Amount**, this field can be configured as a control point on a purchase contract if desired. There are no controls on this field on a purchase contract out of box.
- **Maximum Release Amount**: this field can be configured as a control point on a the maximum spend for each release that is created from the purchase contract if desired. There are no controls on this field on a purchase contract out of box.
- **Company**, this is the vendor field when the vendor is added the address, City, State/Province, Zip/Postal Code, and Contact will populate if the vendor records have been entered properly.
- **Freight Terms**, This field allow the buyer to set the agreed upon terms related to shipping and receiving associated with this contract. +
- **F.O.B.**, This field points to which merchandise is on board a vehicle and in transit.
- **Ship Via**, This field points to the name of the shipping company to use for transporting items associated with this contract.
- **Payment Terms**, This field points to the agreed upon terms related to monetary payments associated with this contract.
- **Pay Tax to Vendor**, If this field is checked the tax associated with a transaction for this contract will be paid to the vendor. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract.
- **Inspection Required**, If this flag is set the all the release PO's lines associated with this contract will require inspection at the time of receipt. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract. This setting it to make all lines on the contract inspection required, because it is a vendor setting.

Price Contract Properties

Contract
Properties
Contract Lines
Terms and Conditions

Contract:
 Type:
 Status:

Revision:
 Total Cost:

Properties

Requires PO? <input checked="" type="checkbox"/>	Extendable? <input type="checkbox"/>	Acceptance Period: <input type="text"/>	Vendor Termination Allowed? <input checked="" type="checkbox"/>
Create Release? <input type="checkbox"/>	Conditions for Extension: <input type="text"/>	Acceptance Loss? <input checked="" type="checkbox"/>	Vendor Notification Period: <input type="text"/>
Can Exceed Amount? <input type="checkbox"/>	Extension Period: <input type="text"/>	Shipping Loss? <input type="checkbox"/>	Customer Termination Allowed? <input checked="" type="checkbox"/>
Payment Schedule? <input type="checkbox"/>		Customer Notification Period: <input type="text"/>	
Add Lines on Use? <input type="checkbox"/>			
Maintain Hierarchy? <input type="checkbox"/>			

- *All the fields below can be configured to default a desired value as a starting point when creating the contract:*
- **Required PO**, Checking this box indicates a PO is required for this contract.
- **Create Release**, Checking this box indicates you can create a release from the contract.
- **Can Exceed Amount**, Checking this box indicates you can exceed the specified maximum amount on this contract.
- **Payment Schedule**, Checking this box indicates a that there is a defined payment schedule.
- **Add Lines on Use**, Checking this box indicates you can add lines to the purchase document with contract reference.
- **Maintain Hierarchy**, Checking this box allow you to maintain hierarchy's associated with rotating items that are on the contract lines of this contract.
- **Extendable**, Checking this box indicates the contract is extendable.
- **Condition for Extension**, Details any conditions that may exist for an extension.
- **Extension Period**, If the contract is extendable, this field indicates the auto extend period in days driven from the condition if associated with the contract.
- **Acceptance Period**, Amount of time in days that can pass before the buyer must either accept the received items or return them.
- **Acceptance Loss**, Checking this box indicates you are liable for acceptance loss.
- **Shipping Loss**, Checking this box indicates you are liable for shipping loss.
- **Vendor Termination Allowed**, Checking this box indicates that early termination is allowed by vendor.
- **Vendor Notification Period**, If early termination is allowed by vendor, this indicates the notice of termination in days.
- **Customer Termination Allowed**, Checking this box indicates that early termination by the customer is allowed.
- **Customer Notification Period**, If early termination by the customer is allowed this is the customer notification period in days.

Price Contract Lines

[List View](#) | [Contract](#) | [Properties](#) | **[Contract Lines](#)** | [Terms and Conditions](#)

Contract: 1042 TESTING * Type: PRICE Status: DRAFT
 Revision: 0 Total Cost: 0.00

Contract Lines [Filter](#) > [1 - 1 of 1](#)

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	0-0048	Tubing, Copper- 1-1/16 In ID X .030 In Wall	1.00	EACH	55.24	0.00

Line Item

* Line: 1 Commodity Group: PLUM Manufacturer:
 * Line Type: Item Commodity Code: Model:
 * Item: 0-0048 Tubing, Copper- 1-1/16 In ID X .030 In Wall Condition Code: Catalog #:

Quantity and Costs | **Details** | **Properties**

Quantity: 1.00 Status: DRAFT Change Quantity on Use?
 * Order Unit: EACH * Entered By: MAXIMOMATT Change Price on Use?
 Unit Cost: 55.24 * Entered Date: 8/13/15 5:43 PM Payment Schedule?
 Line Cost: 0.00 Remarks: Inspection Required?

- **New Row**, Clicking this button will add a contract line the contract.
- **Vendor Items**, Clicking this button will all buyer to select the lines that are associated with the vendor on the header of the contract. A single or multiple lines can be returned to the contract.
- **Payment Schedule**, If the schedule payment option is selected on the properties tab, then a schedule payment can be setup.

Price Contract Lines Continued

[List View](#) | [Contract](#) | [Properties](#) | **[Contract Lines](#)** | [Terms and Conditions](#)

Contract: 1042 TESTING *Type: PRICE Status: DRAFT
 Revision: 0 Total Cost: 0.00

Contract Lines [Filter](#) > 1 - 1 of 1

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	0-0048	Tubing, Copper- 1-1/16 In ID X .030 In Wall	1.00	EACH	55.24	0.00

Line Item

* Line: 1
 * Line Type: Item
 * Item: 0-0048 Tubing, Copper- 1-1/16 In ID X .030 In Wall

Commodity Group: PLUM Manufacturer: >>
 Commodity Code: Model:
 Condition Code: Catalog #:

Quantity and Costs | **Details** | **Properties**

Quantity: 1.00 Status: DRAFT Change Quantity on Use?
 * Order Unit: EACH Entered By: MAXIMOMATT Change Price on Use?
 Unit Cost: 55.24 * Entered Date: 8/13/15 5:43 PM Payment Schedule?
 Line Cost: 0.00 Remarks: Inspection Required?

- **Line**, The number of associated with an individual contract line.
- **Line Type**, A code that indicates the type of item listed on the line. The value of line type could be Item, Material, Service, Special Order or External Catalog Item.
- **Item**, A unique identifier for the item.
- **Item Description**, A written description of the entity on the contract line.
- **Commodity Group**, The commodity group in which the line item is listed.
- **Commodity Code**, A unique code indicating the type of commodity on the line.
- **Condition Code**, A code indicating a condition for the item rotated out of service and into a storeroom.
- **Manufacture**, Unique code indicating the manufacturer of the item listed on the contract line.
- **Model**, The vendor's unique identification number for an item.
- **Catalog**, A unique code for cataloging an item.
- **Quantity**, The number of an item ordered on this line.
- **Order Unit**, Indicates the physical characteristics of a unit. A unit can be each, box, roll, linear feet, cubic feet, square feet etc.
- **Unit Cost**, The monetary value associated with an ordered unit.
- **Line Cost**, The sum of the unit cost multiplied by the order quantity.
- **Status**, Indicates the status of the Contract Line. Could be one of Draft, Approved, Cancel and Waiting for Approval.
- **Entered By**, The name of the logged in user who entered the line item.
- **Entered Date**, The on which the line item was entered.
- **Remarks**, Comments about the individual line or line item.
- **Delivery Time**, The number of days between the order date and the delivery date.
- **Change Quantity on Use**, Checking this box indicates you can change the quantity on the line with contract reference.
- **Change Price on Use**, Checking this box indicates you can change the price on the line with contract reference.
- **Payment Schedule**, Checking this box indicates the line has a payment schedule associated with it. This happens by default if you created a payment schedule for the line.
- **Inspection Required**, Indicates whether inspection of line item is required upon receipt. **Reminder**, this setting is line item specific on the contract line. If an item is flagged as inspection required at the item level, this setting will default from the item master.

Price Contract Terms and Conditions

Contract: 1043 TESTING Type: PRICE Status: DRAFT
Revision: 0 Total Cost: 55.24

Terms and Conditions Filter 1 - 4 of 4

Sequence	Term	Description	Send to Vendor?
40	SHIPPINGPK	SHIPPING, PACKAGING AND LABELING	<input checked="" type="checkbox"/>
30	PRICETAXE	PRICE/TAXES	<input checked="" type="checkbox"/>
20	LOSSRISK	TITLE AND RISK OF LOSS	<input checked="" type="checkbox"/>
10	INDEMNITY	INDEMNITY	<input checked="" type="checkbox"/>

Select Terms New Row

- **New Row**, allows you to add from an existing list of payment term one at a time.
- **Select Terms**, Allows you to select from a list of terms in multiples if desired.
- Second Screen:
- **Example:** After clicking new row, you have an option to select a given Terms code that returns to the contract line as shown.

Price Contract - Managing Payment Terms

The screenshot shows the 'Terms and Conditions' application interface. On the left is a navigation sidebar with options like 'Go To Applications', 'Available Queries', 'All Records', 'Common Actions', 'Save Terms and Conditions', 'Clear Changes', and 'More Actions'. The main area is divided into two sections: 'Organizations' and 'Terms and Conditions for EAGLENA'.

Organizations Table:

Organization	Description
EAGLENA	EAGLE Inc. North America
EAGLESA	Eagle South America, Inc.
EAGLEUK	European Headquarters of Eagle, Inc.
POOKSITE	The coolest place on earth
JASONORG	Jason Training Org

Terms and Conditions for EAGLENA Table:

Term	Description	Type	Editable?	Default on PO?
ACKNOINT	ACKNOWLEDGMENT AND ACCEPTANCE	PURCH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ASSIGNM	ASSIGNMENT/SUBCONTRACTING	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUYERSPR	BUYER'S PROPERTY IN SELLER'S POSI	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CANCELLA	CANCELLATIONS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CHANGES	CHANGES/AMENDMENTS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
COMPLIANC	COMPLIANCE WITH LAWS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONDUCT	STANDARDS OF CONDUCT	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
CONTRCTL	LAW OF THE CONTRACT	CONTRACT	<input type="checkbox"/>	<input type="checkbox"/>
FORCEMAJ	DELIVERY/FORCE MAJEURE	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
INDEINITY	INDEINITY	PURCH	<input type="checkbox"/>	<input type="checkbox"/>

This screenshot shows the same application interface as the first screenshot, but with the 'Details' section for a new row expanded at the bottom.

Organizations Table:

Organization	Description
EAGLENA	EAGLE Inc. North America
EAGLESA	Eagle South America, Inc.
EAGLEUK	European Headquarters of Eagle, Inc.
POOKSITE	The coolest place on earth
JASONORG	Jason Training Org

Terms and Conditions for EAGLENA Table:

Term	Description	Type	Editable?	Default on PO?
ASSIGNM	ASSIGNMENT/SUBCONTRACTING	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUYERSPR	BUYER'S PROPERTY IN SELLER'S POSI	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CANCELLA	CANCELLATIONS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CHANGES	CHANGES/AMENDMENTS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
COMPLIANC	COMPLIANCE WITH LAWS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONDUCT	STANDARDS OF CONDUCT	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
CONTRCTL	LAW OF THE CONTRACT	CONTRACT	<input type="checkbox"/>	<input type="checkbox"/>
FORCEMAJ	DELIVERY/FORCE MAJEURE	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
INDEINITY	INDEINITY	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

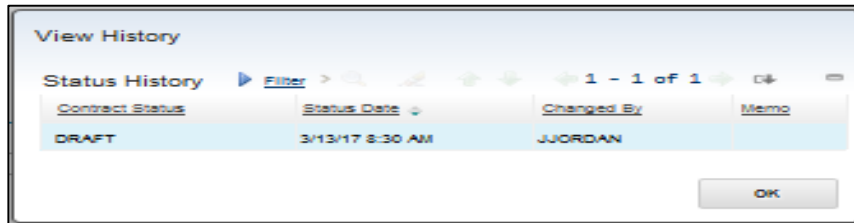
Details Section:

Term: Editable?

Type: Default on PO?

- **Navigations:** Contract – Term & Conditions
- **New Row,** This allow you to create a new Terms and Conditions code or manage an existing Terms and Condition Code.
- **Terms,** Identifies the term or condition. This value must be unique for all terms.
- **Description,** Describes the term or condition. To enter or view additional information, click the Long Description button.
- **Type,** Identifies the type of term or condition. The type is user-defined.
- **Editable,** Specifies whether the term can be edited when accessed from other applications. If the check box is selected, users can edit the term when accessed from other applications. If the checkbox is cleared (the default), users cannot edit the term in other applications.
- **Default on PO,** Specifies whether the term will appear on new POs by default. If the check box is selected, the term will appear as a default term on new POs. If the checkbox is cleared, the term will not appear by default on new POs.

Price Contract – More Actions



The screenshot shows a 'View History' dialog box with a table of contract status changes. The table has four columns: 'Contract Status', 'Status Date', 'Changed By', and 'Memo'. There is one row of data showing the status as 'DRAFT', the date as '3/13/17 8:30 AM', and the user as 'JJORDAN'. An 'OK' button is located at the bottom right of the dialog box.

Contract Status	Status Date	Changed By	Memo
DRAFT	3/13/17 8:30 AM	JJORDAN	

- **View History**, This allow you to see all the history associated with the status changes of the contract.

Price Contract – More Action - Copy Lines from PRs

Copy PR Lines To Contract

PR Line Items Filter 1 - 15 of 42

<input type="checkbox"/>	PR	Company	Item	Description	Quantity	Unit Cost	Requested By	Required Date	Status	Copy to Contract?
<input type="checkbox"/>	1004	BEK	0-7205	Valve, Needle- 1/4 in	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	217213	Plate, Stainless Steel	2.00	7.59	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	231177	Guide- Carton Machine	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	335029	Hub- 2 in Die	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	570-72	Valve, Needle- 2M-V4IN	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	6-L203	Tee, Steel, Male Thread- 1/2 in	2.00	3.79	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	900810	Lubricator Assembly	1.00	3.79	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	G23117	Carton Guide- Chain Wash Machine	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1005	GST	X0IP-3000	Gasket- E330	2.00	1.10	LIBERI	2/7/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1005	GST	X00X-1500	Guard, For Gast Pump- AC-683	1.00	6.00	LIBERI	2/7/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1006	ATI	217213	Plate, Stainless Steel	2.00	7.59	LIBERI		APPR	<input type="checkbox"/>
<input type="checkbox"/>	1006	ATI	S84-L0	Lockwasher- 1/2 in	1.00	625.00	LIBERI		APPR	<input type="checkbox"/>
<input type="checkbox"/>	1007		4500-5	PDA (Sales)	50.00	0.00	WILSON	12/8/04	APPR	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1008	DATACHIP	D650	Series II Laptop	2.00	1,950.00	WILSON		WAPPR	<input type="checkbox"/>
<input type="checkbox"/>	1009	DATACHIP	D650	Series II Laptop	3.00	1,950.00	WILSON		WAPPR	<input type="checkbox"/>

- **Copy Lines From PRs**, this give a buyer the option to copy PR lines that exist for the vendor on the contract by using the filter option on the Copy PR lines To Contract screen.

Price Contract – More Action - Copy Lines from POs

Copy PO Lines To Contract

Filter > 1 - 15 of 170

<input type="checkbox"/>	PO	Revision	Company	Item	Description	Quantity	Storeroom	Work Order	Requested By	Required Date
<input type="checkbox"/>	1005	0	GCE	29331	Building Thermostat	2.00	PKG			7/31/96
<input type="checkbox"/>	1000	0	ATI	560-00	Tubing, Copper-1 in ID X .030 in Wall	3.00	CENTRAL			
<input type="checkbox"/>	1031	0	HELUWIG	PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	1.00	CENTRAL		SMITH	
<input type="checkbox"/>	B4194	0	ATI	117084	Shaft- 1 inch Dia	8.00	CENTRAL		SANTANA	6/3/01
<input type="checkbox"/>	B4230	0	ATI	53-143	V-Belt- 1/2 in, 30 In Circumference	12.00	CENTRAL		SANTANA	9/16/01
<input type="checkbox"/>	1085	0	GOODYEAR	11R22.5G8-5	Goodyear 11R22.5 G327 Steer Tire	40.00	ATLANTA		WILSON	
<input type="checkbox"/>	B4230	0	ATI	117084	Shaft- 1 inch Dia	10.00	CENTRAL		SANTANA	9/16/01
<input type="checkbox"/>	1026	0	OFFRUIS	231177	Guide- Carton Machine	1.00	CENTRAL		LIBERI	
<input type="checkbox"/>	1009	0	IR	PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	1.00	CENTRAL		WILSON	1/18/97
<input type="checkbox"/>	1021	0	KENNEDY	560-00	Tubing, Copper-1 in ID X .030 in Wall	1.00	CENTRAL		LIBERI	
<input type="checkbox"/>	5197	0	HELUWIG	11453	Seal, Mechanical, Self Aligning- 1 in ID	1.00	CENTRAL		LIBERI	10/25/95
<input type="checkbox"/>	1061	0	DATACHIP	D650	Series II Laptop	15.00	HARDWARE		WILSON	10/8/04
<input type="checkbox"/>	1082	0	COMPDEP	ANTIVIRUS	Antivirus software	50.00	SOFTWARE		WILSON	10/12/04
<input type="checkbox"/>	A3312	0	GST	XMP-7000	Rotor And Shaft- AW508, 3 in Dia	5.00	CENTRAL		SANTANA	5/13/01
<input type="checkbox"/>	A3249	0	GST	XMP-3500	Cylinder, Hydraulic- AA267	5.00	CENTRAL		SANTANA	11/29/00

OK Cancel

- **Copy Lines From POs**, this give a buyer the option to copy PO lines that exist for the vendor on the contract by using the filter option on the Copy PR lines To Contract screen.

Creating an RFQ from the Price Contract

Create RFQ

Select line items to be included on the RFQ by selecting the checkbox on the rows or select the checkbox on the header to select all line items. Add the default charge values for the selected lines in the bottom section. Click OK to create the RFQ with the selected line items and return to the contract.

RFQ: 1007 TEST FOR VAL00

Autonumber

Contract Lines 1 - 3 of 3

Line	Item	Description	Order Unit	Issue Unit	Conversion Factor	Manufacturer	Model	Catalog #
<input type="checkbox"/>	1	VAL103	SERVICIE TEST ITEM	HOURS				SERVICE1
<input type="checkbox"/>	2	VAL101	TEST ITEM 2	EACH				BRD4320
<input type="checkbox"/>	3	VAL100	TEST ITEM 1	EACH				BAC123L

RFQ Charge Values

Work Order: Storeroom: >> >>

Location: GL Debit Account: >> >>

Asset: Site: >> BEDFORD

OK Cancel

- **Create RFQ:**
- **RFQ**, A unique identifier for this RFQ.
- **Description**, A brief description of this RFQ.
- **Auto Number**, this button when clicked will auto create the RFQ number.
- **Contract Lines:**
- **Note:** Contract lines must be selected to copy them to the RFQ lines.
- **Contract Lines**, this option allows you to select all line from the contract, or some of the lines from the contract to be copied to the RFQ. If you want all line click the box on the header, but if you only want some of the lines click the box beside the specific lines.
- **Order Units**, Non-persistent field to hold the order unit value
- **Conversion Factor**, the conversion factor should follow the Order Units, it is best to manage changes on the RFQ line so the value select will be persistent.
- **RFQ Change Values:**
- **Work Order**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Location**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Asset**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Storeroom**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **GL Debit Account**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Site**, defaults based on the users default site.
- **OK**, click OK to create the RFQ
- **Cancel**, click cancel to roll back and discontinue creation of the RFQ.

Viewing RFQ and PR Lines copied to the Price Contract as well as invoice lines.

View RFQ Line Items

RFQ Lines **Filter** > 0 - 0 of 0

Line	RFQ	RFQ Line	Item	Description	Quantity	Unit Cost	Line Cost
There are no rows to display.							

OK

View PR Line Items

PR Lines **Filter** > 0 - 0 of 0

Line	PR	PR Line	Item	Description	Quantity	Unit Cost	Line Cost
There are no rows to display.							

OK

View Invoice Lines

Invoice Lines **Filter** > 1 - 1 of 1

Invoice	Invoice Line	Company	Quantity	Unit Cost	Line Cost
1088	1	BURSAW	1.00	60.00	60.00

OK

- **View RFQ Line Items**, If line were add to a contract from and RFQ they can always be view by select view RFQ lines.

- **Second Screen:**

- **View PR Line Items**, If line were add to a contract from and PR they can always be view by select view RFQ lines.

- **Third Screen:**

- **View Invoice Lines**, Invoice lines can be viewed once the invoice has be created.

Price Contract Authorize Sites

Authorize Sites

To add a site that is authorized to use this contract use New Row and add an individual site or use Select Sites to select multiple sites simultaneously. If required, modify the default Company and Bill To information for each authorized site. Click OK to authorize the specified sites and return to the contract.

Sites Filter > 1 - 1 of 1

Vendor	Site	Organization	Default?	Bill To	Attention
BURSAW	BEDFORD	EAGLENA	<input type="checkbox"/>	BEDFORDM	KATHYB

Select Sites New Row

OK Cancel

- **Authorize Sites**, At least one site must be authorized to change the contract status to APPR.
- **New Row**, click the new row button will all you to select one site at a time.
- **Select Sites**, click the Select Sites button will all you to select multiple sites at once.
- **OK**, clicking OK to add the authorized site or sites.
- **Cancel**, click cancel to roll back and discontinue.

Price Contracts and managing commodity groups and Code

Associate Commodities

To associate commodities with this contract use New Row and add an individual commodity or use Select Commodities to select multiple records simultaneously.

Commodity Groups Filter 0 - 0 of 0

Commodity Group	Description	Service?
There are no rows to display.		

Select Commodity Groups New Row

Commodity Codes for Commodity Group Filter 0 - 0 of 0

Commodity Code	Description	Service?
There are no rows to display.		

Select Commodity Codes New Row

OK Cancel

Associate Commodities

To associate commodities with this contract use New Row and add an individual commodity or use Select Commodities to select multiple records simultaneously.

Commodity Groups Filter 1 - 2 of 2

Commodity Group	Description	Service?
31171500	MOTOR	<input type="checkbox"/>

Details

Commodity Group:
31171500 BEARINGS

Service?

Select Commodity Groups New Row

Commodity Codes for Commodity Group 31171503 Filter 1 - 1 of 1

Commodity Code	Description	Service?
31171503	WHEEL BEARINGS	<input type="checkbox"/>

Select Commodity Codes New Row

OK Cancel

- **Associate Commodities:**
 - **New Row**, commodity groups can be associated with the purchase contracts one at a time by selecting the New Row button. Service commodity groups can also be associated.
 - **Select Commodity Groups**, multiple commodities groups can be associated with purchase contracts by selecting the Select commodity groups button. Service commodity groups can also be associated.
-
- **Second Screen:**
 - **New Row**, commodity codes for the commodity group selected can be added one at a time by clicking New Row.
 - **Select Commodity Codes**, multiple commodity codes for the commodity group selected can be added by clicking the select commodity codes button.
 - **Ok**, clicking OK will associate the commodity codes with the purchase contract.
 - **Cancel**, click cancel to roll back and discontinue.

Price Contract SLA's

Associate SLAs

To associate an SLA with this contract use New Row and add an Individual SLA or use Select SLAs to select multiple records simultaneously. Click OK to associate the specified SLAs and return to the contract.

Associate SLAs Filter 1 - 1 of 1

SLA	Description	Vendor	Start Date	End Date	Type	Status
1024	>> Vendor Labor Certification Renewal Agreements	DATACHIP	7/1/04 12:00 AM	8/30/06 12:00 AM	VENDOR	ACTIVE

Select SLAs New Row

OK Cancel

- **Associate SLA's:**
- **New Row**, by clicking new row you can select existing SLA's one at a time.
- **Select SLA's**, by clicking Select SLA's you can select multiple existing SLA's.
- **OK**, click OK to add the SLA's selected to the purchase contract.
- **Cancel**, click cancel to roll back and discard.

Price Contract Revision

Revise Contract

Enter a description for the revised contract. Click OK when finished.

Contract Reference: 1039

Revision: 1

OK Cancel

View Revision History

Contract Details Filter 1 - 4 of 4

Revision	Status	Company	Start Date	End Date	Maximum Amount	Changed By	Changed Date	Revision Comments
3	APPR	GCE	1/1/04	12/31/05		WILSON	6/29/07 10:24 AM	additional items provided
2	REVISD	GCE	1/1/04	12/31/05		WILSON	6/29/07 10:24 AM	item no longer available - removing from contract
1	REVISD	GCE	1/1/04	12/31/05		WILSON	9/27/04 4:28 PM	4% price increase
0	REVISD	GCE	1/1/04	12/31/05		WILSON	9/23/04 5:01 PM	

Contract Line Details Filter 1 - 8 of 15

Line	Revision	Revision Status	Line Type	Item	Description	Quantity	Unit Cost	Line Cost
10	3	ADDED	ITEM	L-CABLE	Coaxial PVC LAN cable	1.00	4.33	4.33
9	3	CHANGED	ITEM	140-2919 Relay - Main Junction Box		1.00	280.00	280.00
9	2		ITEM	140-2919 Relay - Main Junction Box		1.00	280.00	280.00
8	2		ITEM	134-3124 MOUNTING - GP BATTERY		1.00	29.64	29.64
8	3	CHANGED	ITEM	134-3124 MOUNTING - GP BATTERY		1.00	29.64	29.64
7	3	CHANGED	ITEM	134-3154 MOUNTING GP - JUNCTION BOX		1.00	15.08	15.08
7	2		ITEM	134-3154 MOUNTING GP - JUNCTION BOX		1.00	15.08	15.08
6	2		ITEM	EB12 12 Volt Battery		1.00	16.54	16.54

pk

- **Revise Contract:**
- **Description**, enter a description, there is a long description associated with this field also.
- **OK**, click OK to commit the Revision.
- **Cancel**, click cancel to roll back and discard.
- **Second Screen:**
- **View Revision History**, click view revision history to see the history of all revision associated with the purchase contract.
- **OK**, click OK to close dialog.

Price Contract Apply Price Adjustment

Apply Price Adjustment

Select the lines whose price you would like to change. Indicate with a positive or negative percentage, the change that will be applied to the selected lines. Click OK for changes to take affect.

Adjustment %:

Contract Lines Filter 1 - 2 of 2

<input type="checkbox"/>	Line	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost	New Unit Cost	New Line Cost
<input checked="" type="checkbox"/>	1		SERVICE TEST LINE	1.00	HOURS	65.00	65.00		
<input type="checkbox"/>	2	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00		

Apply Price Adjustment

Select the lines whose price you would like to change. Indicate with a positive or negative percentage, the change that will be applied to the selected lines. Click OK for changes to take affect.

Adjustment %:

Contract Lines Filter 1 - 2 of 2

<input type="checkbox"/>	Line	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost	New Unit Cost	New Line Cost
<input checked="" type="checkbox"/>	1		SERVICE TEST LINE	1.00	HOURS	65.00	65.00		
<input type="checkbox"/>	2	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00		

- **Apply Price Adjustment:**
- The purchase contract header must be in **DRAFT, WAPPR, or PNDREV** to apply a price adjustment.
- **Adjustment %**, enter a positive or negative value in the percentage field (see second screen for negative entry).
- **Contract Line**, select the line or lines to apply the price change too.
- **OK**, click OK to apply the price change to the selected lines.
- **Cancel**, click cancel to roll back and discard.

Price Contract – Change Line Status

Change Line Status

Indicate a new line status to apply to selected contract lines. To select lines, select the checkbox on the rows whose status will be changed. To select all lines, select the checkbox on the header. Click OK to apply the status change and return to the contract.

Line Status:

Contract Lines

<input type="checkbox"/>	Line	Item	Description	Status
<input checked="" type="checkbox"/>	1	11406	AC Spark Plug	APPR
<input type="checkbox"/>	3	11241	Contractor, Renewal Kit	APPR
<input checked="" type="checkbox"/>	4	29331	Building Thermostat	APPR
<input checked="" type="checkbox"/>	6	EB12	12 Volt Battery	APPR
<input type="checkbox"/>	7	134-3154	MOUNTING GP - JUNCTION BOX	APPR
<input type="checkbox"/>	8	134-3124	MOUNTING - GP BATTERY	APPR
<input type="checkbox"/>	9	140-2919	Relay - Main Junction Box	APPR
<input type="checkbox"/>	10	L-CABLE	Coaxial PVC LAN cable	APPR

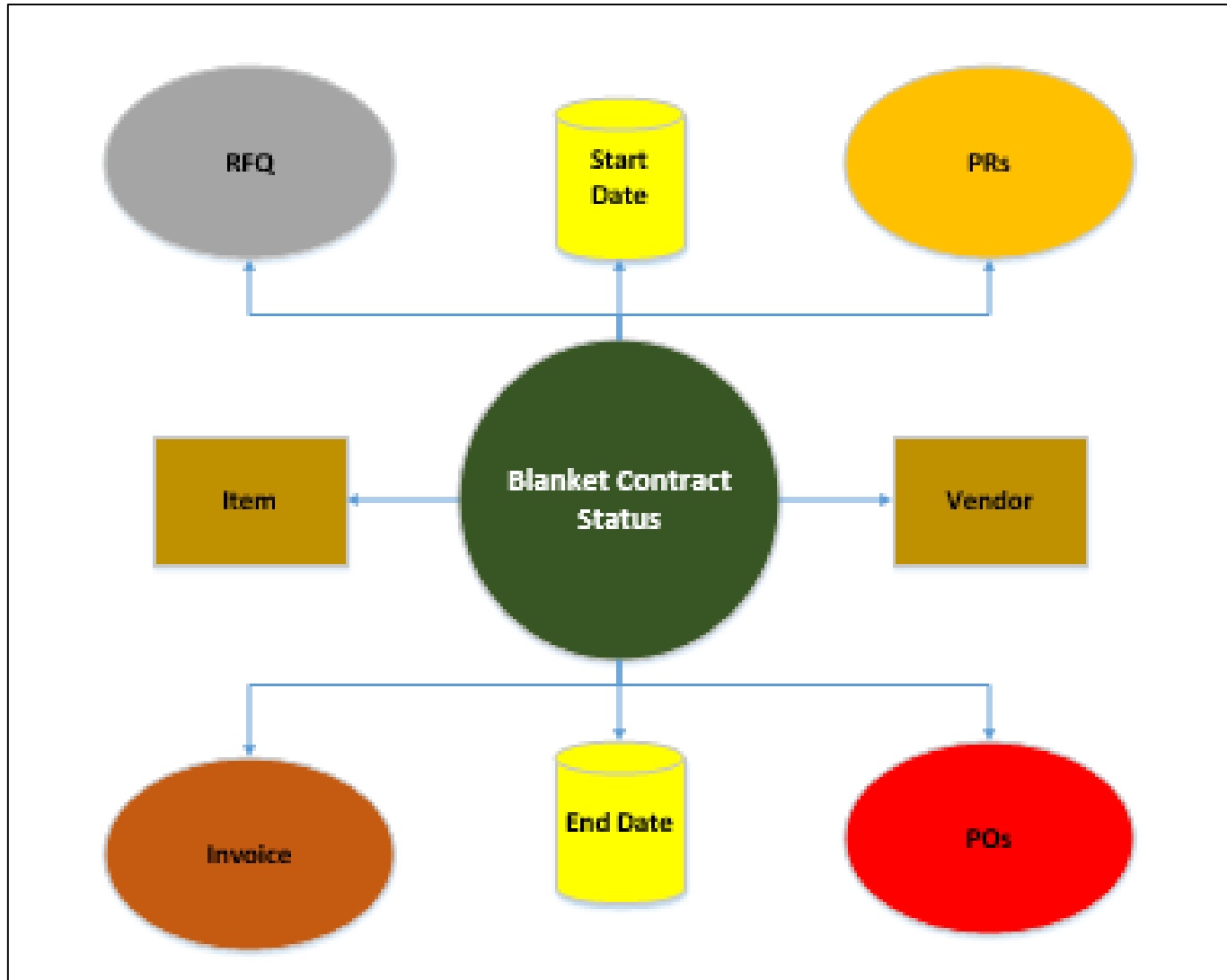
More Actions

- Create Release PO
- View Release Costs
- View RFQ Line Items
- View PR Line Items
- View Invoice Lines
- Authorize Sites
- Associate Commodities
- Associate BLAs
- Revise Contract
- View Revision History
- Apply Price Adjustment
- Change Line Status
- Unit of Measure and Conversion
- Attachment Library/Folders
- Duplicate Purchase Contract
- Add to Bookmarks

- **Change Line Status:**
- The purchase contract must be in the status of APPR to use the change line status. This allows to change the status of specific lines without revising the contract.
- **Line Status**, the domain beside the field allows one to select one of the following line statuses for the contract line APPR, CANCEL, DRAFT, WAPPR.
- **OK**, Click OK to apply the line status change.
- **Cancel**, click cancel to roll back and discard.

- **Second Screen:**
- **Units of Measure**, add modify unit of measure and add modify unit of measure conversion can be managed from More Actions
- **Attachment Library folders**, can be managed from More Actions
- **Duplicate Purchase Contract**, can be managed from More Actions.
- **Add to Bookmarks**, can be managed from More Actions.

Blanket Contracts/Date Flow



Blanket Contract Header

The screenshot displays the 'Blanket Contract Header' form in a software application. The interface is organized into several sections:

- Contract Information:** Includes fields for Contract ID (101), Description (BLANKET CONTRACT TESTING), Type (BLANKET), and Status (DRAFT).
- Revision:** A field for the revision number, currently set to 0.
- Details, Dates, and Costs:** A summary section with sub-sections for:
 - Master Contract:** Start Date (8/17/15), Currency (USD).
 - Vendor Reference #:** End Date (3/31/16), Maximum Amount (100,000.00).
 - Buyer:** Renewal Date, Maximum Release Amount (6,000.00).
- Vendor Information:** Expanded to show:
 - Company:** SWYKING, Software King.
 - Address:** 33 Knights Castle, Houston, Texas.
 - Contact:** Joe King.
 - Phone:** 444-231-0715.
 - Customer #:** (Empty field).
 - Freight Terms:** (Empty field).
 - FOB Point:** (Empty field).
 - Ship Via:** (Empty field).
 - Payment Terms:** (Empty field).
 - Pay Tax to Vendor?** (Checked).
 - Inspection Required?** (Unchecked).

- **Contract field**, this field can be auto populated, or it can remain manual entry.
- **Description field**, there is a 100 character field on the purchase contract.
- **Type**, multiple select, Purchase, **Blanket**, and Price.
- **Status**, default to DRAFT when creating a new contract.
- **Master Contract**, if the contract is created within a master contract there will be a master contract reference number in this field.
- **Vendor Reference #**, this field provides a place to enter a unique identifier for the vendor.
- **Buyer**, this field can be configured to show only buyers as a option.
- **Start Date**, this is the date when the contract will become active, this can be a future date.
- **End Date**, this is the date when the contract will become inactive.
- **Renewal Date**, this a reminder date that should be in advance of the end date so you have time to renew the contract if desired.
- **Currency**, this is the base default, but it may change once the vendor is added, depending on country the vendor is located in.
- **Maximum Amount**, this field can be configured as a control point on a purchase contract if desired. There are no controls on this field on a purchase contract out of box.
- **Maximum Release Amount**: this field can be configured as a control point on a the maximum spend for each release that is created from the purchase contract if desired. There are no controls on this field on a purchase contract out of box.
- **Company**, this is the vendor field when the vendor is added the address, City, State/Province, Zip/Postal Code, and Contact will populate if the vendor records have been entered properly.
- **Freight Terms**, This field allow the buyer to set the agreed upon terms related to shipping and receiving associated with this contract. +
- **F.O.B.**, This field points to which merchandise is on board a vehicle and in transit.
- **Ship Via**, This field points to the name of the shipping company to use for transporting items associated with this contract.
- **Payment Terms**, This field points to the agreed upon terms related to monetary payments associated with this contract.
- **Pay Tax to Vendor**, If this field is checked the tax associated with a transaction for this contract will be paid to the vendor. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract.
- **Inspection Required**, If this flag is set the all the release PO's lines associated with this contract will require inspection at the time of receipt. If this value is set on the vendor record, the value will default to contract once the vendor is added to the contract. This setting it to make all lines on the contract inspection required, because it is a vendor setting.

Blanket Properties

The screenshot displays the 'Properties' configuration screen for a contract. At the top, there are tabs for 'List View', 'Contract', 'Properties', 'Contract Lines', and 'Terms and Conditions'. The 'Properties' tab is active. Below the tabs, there are fields for 'Contract' (ID: 1042, Name: BLANKET CONTRACT TESTING), 'Type' (BLANKET), and 'Status' (DRAFT). There are also fields for 'Revision' (0) and 'Total Cost' (0.00). The main section is titled 'Properties' and contains several rows of configuration options:

Requires PO?	Extendable?	Acceptance Period:	Vendor Termination Allowed?
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
Create Release?	Conditions for Extension:	Acceptance Loss?	Vendor Notification Period:
<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Can Exceed Amount?	Extension Period:	Shipping Loss?	Customer Termination Allowed?
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Schedule?			Customer Notification Period:
<input type="checkbox"/>			<input type="text"/>
Add Lines on Use?			
<input checked="" type="checkbox"/>			
Maintain Hierarchy?			
<input type="checkbox"/>			

- *All the fields below can be configured to default a desired value as a starting point when creating the contract:*
- **Required PO**, Checking this box indicates a PO is required for this contract.
- **Create Release**, Checking this box indicates you can create a release from the contract.
- **Can Exceed Amount**, Checking this box indicates you can exceed the specified maximum amount on this contract.
- **Payment Schedule**, Checking this box indicates a that there is a defined payment schedule.
- **Add Lines on Use**, Checking this box indicates you can add lines to the purchase document with contract reference.
- **Maintain Hierarchy**, Checking this box allow you to maintain hierarchy's associated with rotating items that are on the contract lines of this contract.
- **Extendable**, Checking this box indicates the contract is extendable.
- **Condition for Extension**, Details any conditions that may exist for an extension.
- **Extension Period**, If the contract is extendable, this field indicates the auto extend period in days driven from the condition if associated with the contract.
- **Acceptance Period**, Amount of time in days that can pass before the buyer must either accept the received items or return them.
- **Acceptance Loss**, Checking this box indicates you are liable for acceptance loss.
- **Shipping Loss**, Checking this box indicates you are liable for shipping loss.
- **Vendor Termination Allowed**, Checking this box indicates that early termination is allowed by vendor.
- **Vendor Notification Period**, If early termination is allowed by vendor, this indicates the notice of termination in days.
- **Customer Termination Allowed**, Checking this box indicates that early termination by the customer is allowed.
- **Customer Notification Period**, If early termination by the customer is allowed this is the customer notification period in days.

Blanket Lines

Contract: 1043 BLANKET CONTRACT TESTING Type: BLANKET Status: DRAFT
Revision: 0 Total Cost: 0.00

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	JJ3456	TRAINING ITEM FOR - JOE JORDAN	1.00	ROLL	0.00	0.00

Line Item

* Line: 1
* Line Type: Item
* Item: JJ3456 TRAINING ITEM FOR - JOE JORDAN
Commodity Group: 31201500
Manufacturer: []
Commodity Code: []
Model: []
Condition Code: []
Catalog #: []

Quantity and Costs
Quantity: 1.00
Order Unit: ROLL
Unit Cost: 0.00
Line Cost: 0.00

Details
Status: DRAFT
Entered By: MAXIMOMAT1
Entered Date: 8/17/15 3:24 PM
Remarks: []
Delivery Time: 6

Properties
Change Quantity on Use?
Change Price on Use?
Payment Schedule?
Inspection Required?

Payment Schedule Vendor Items New Row

- **New Row**, Clicking this button will add a contract line the contract.
- **Vendor Items**, Clicking this button will all buyer to select the lines that are associated with the vendor on the header of the contract. A single or multiple lines can be returned to the contract.
- **Payment Schedule**, If the schedule payment option is selected on the properties tab, then a schedule payment can be setup.

Blanket Lines Continued

The screenshot displays a software interface for managing contract lines. At the top, there are tabs for 'List View', 'Contract', 'Properties', 'Contract Lines', and 'Terms and Conditions'. The 'Contract Lines' tab is active, showing a contract with ID 1043, name 'BLANKET CONTRACT TESTING', and type 'BLANKET'. The status is 'DRAFT' and the total cost is 0.00.

Below the contract information is a table of contract lines. The table has columns for Line, Line Type, Item, Description, Quantity, Order Unit, Unit Cost, and Line Cost. One line is visible:

Line	Line Type	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost
1	ITEM	JJ3456	TRAINING ITEM FOR - JOE JORDAN	1.00	ROLL	0.00	0.00

Below the table is a 'Line Item' section with various fields for configuration. The 'Quantity and Costs' section shows: Quantity: 1.00, Order Unit: ROLL, Unit Cost: 0.00, Line Cost: 0.00. The 'Details' section shows: Status: DRAFT, Entered By: MAXIMOMAT, Entered Date: 8/17/15 3:24 PM, Delivery Time: 6. The 'Properties' section includes checkboxes for 'Change Quantity on Use?' (checked), 'Change Price on Use?', 'Payment Schedule?', and 'Inspection Required?'.

- **Line**, The number of associated with an individual contract line.
- **Line Type**, A code that indicates the type of item listed on the line. The value of line type could be Item, Material, Service, Special Order or External Catalog Item.
- **Item**, A unique identifier for the item.
- **Item Description**, A written description of the entity on the contract line.
- **Commodity Group**, The commodity group in which the line item is listed.
- **Commodity Code**, A unique code indicating the type of commodity on the line.
- **Condition Code**, A code indicating a condition for the item rotated out of service and into a storeroom.
- **Manufacture**, Unique code indicating the manufacturer of the item listed on the contract line.
- **Model**, The vendor's unique identification number for an item.
- **Catalog**, A unique code for cataloging an item.
- **Quantity**, The number of an item ordered on this line.
- **Order Unit**, Indicates the physical characteristics of a unit. A unit can be each, box, roll, linear feet, cubic feet, square feet etc.
- **Unit Cost**, The monetary value associated with an ordered unit.
- **Line Cost**, The sum of the unit cost multiplied by the order quantity.
- **Status**, Indicates the status of the Contract Line. Could be one of Draft, Approved, Cancel and Waiting for Approval.
- **Entered By**, The name of the logged in user who entered the line item.
- **Entered Date**, The on which the line item was entered.
- **Remarks**, Comments about the individual line or line item.
- **Delivery Time**, The number of days between the order date and the delivery date.
- **Change Quantity on Use**, Checking this box indicates you can change the quantity on the line with contract reference.
- **Change Price on Use**, Checking this box indicates you can change the price on the line with contract reference.
- **Payment Schedule**, Checking this box indicates the line has a payment schedule associated with it. This happens by default if you created a payment schedule for the line.
- **Inspection Required**, Indicates whether inspection of line item is required upon receipt. **Reminder**, this setting is line item specific on the contract line. If an item is flagged as inspection required at the item level, this setting will default from the item master.

Blanket Terms and Conditions

Contract: BLANKET CONTRACT TESTING Type: Status:

Revision: Total Cost:

Terms and Conditions Filter > 1 - 4 of 4

Sequence	Term	Description	Send to Vendor?
▶ 40	WARRANTIES	WARRANTIES	<input checked="" type="checkbox"/>
▶ 30	PRICETAXE	PRICE/TAXES	<input checked="" type="checkbox"/>
▶ 20	INDEMINITY	INDEMINITY	<input checked="" type="checkbox"/>
▶ 10	ACKNGMINT	ACKNOWLEDGMENT AND ACCEPTANCE	<input checked="" type="checkbox"/>

- **New Row**, allows you to add from an existing list of payment term one at a time.
- **Select Terms**, Allows you to select from a list of terms in multiples if desired.
- Second Screen:
- **Example:** After clicking new row, you have an option to select a given Terms code that returns to the contract line as shown.

Blanket Authorized Sites

Sequence	Term	Description	Send to Vendor?
40	WARRANTIE	WARRANTIES	<input checked="" type="checkbox"/>
30	PRICETAXE	PRICE/TAXES	<input checked="" type="checkbox"/>
20	INDEMNITY	INDEMNITY	<input checked="" type="checkbox"/>
10	ACKNGMINT	ACKNOWLEDGMENT AND ACCEPTANC	<input checked="" type="checkbox"/>

- **Authorize Sites**, At least one site must be authorized to change the contract status to APPR.
- **New Row**, click the new row button will all you to select one site at a time.
- **Select Sites**, click the Select Sites button will all you to select multiple sites at once.
- **OK**, clicking OK to add the authorized site or sites.
- **Cancel**, click cancel to roll back and discontinue.

Blanket Contract – Payment Schedule

Payment Schedule

Item:

Schedule Lines **Filter** > 0 - 0 of 0

Schedule Line	Action	Payment Percent	Line Cost	Days Interval	Target Invoice Status
There are no rows to display.					

Invoices **Filter** > 0 - 0 of 0

Invoice	PO	Invoice Total	Entered Date	Due Date	Status
There are no rows to display.					

Payment Schedule

Item:

Schedule Lines **Filter** > 1 - 1 of 1

Schedule Line	Action	Payment Percent	Line Cost	Days Interval	Target Invoice Status
1	RECEIPT	100.00	65.00	7	WAPPR

Details

Schedule Line: * Action:

Days Interval: * Target Invoice Status:

Line Cost:

Payment Percent:

Invoices **Filter** > 0 - 0 of 0

Invoice	PO	Invoice Total	Entered Date	Due Date	Status
There are no rows to display.					

- **Payment Schedule**, click New Row to create a payment schedule for the lines. **Reminder**, payment schedules are setup line specific so you can have multiple lines and only have a payment schedule for a given line if desired.
- Second Screen Setting up the payment Schedule:
- **Days Interval**, Time passed between action and payment.
- **Line Cost**, the line cost default from the contract line if desired.
- **Payment Percent**, Percentage to be paid at this time.
- **Action**, that triggers this payment (POAPPR, RECEIPT, INSPECT).
- **Target Invoice Date**, The invoice created in a Entered (WAPPR) or Approved (APPR) status?
- Invoices:
- Invoice, the invoice number that was created against the scheduled payment
- PO, the PO number created and used for the invoice payment.
- Invoice Total, the total amount of the invoice payment based on the payment percentage plus possible carrying costs.
- Entered Date, the date the invoice was created or entered.
- Due Date, payment due, based on the payment terms and days interval.
- Status, shows the current invoice status.
- FYI, Invoice Type:
- **Schedule Payments, create an Invoice Type** of "SCHED", (Maximo understands this invoice type, and the only way to create and invoice type of SCHED is via schedule payment from a contract. Most payment systems do not recognize this type of invoice . As a result it is common to change the "SCHED" type invoice to "INVOICE" before is passes through the interface to remove the problem.

Blanket Contracts – Selecting Payment Terms

This screenshot shows the 'Terms and Conditions' screen for contract 1043. The contract type is 'PURCHASE' and the status is 'DRAFT'. The total cost is 3,565.00. The table below is empty, with the message 'There are no rows to display.' Below the table are buttons for 'Select Terms' and 'New Row'.

Sequence	Term	Description	Send to Vendor?
There are no rows to display.			

This screenshot shows the 'Terms and Conditions' screen with one row selected. The row has Sequence 10, Term 'ACKNMINTA', and Description 'ACKNOWLEDGMENT AND ACCEPTANCE'. The 'Send to Vendor?' checkbox is checked. A 'Details' section is expanded below the table, showing the selected term's details: Sequence 10, Term 'ACKNMINTA', and Description 'ACKNOWLEDGMENT AND ACCEPTANCE OF ORDER'. The 'Send to Vendor?' checkbox is also checked in the details section. Buttons for 'Select Terms' and 'New Row' are at the bottom.

Sequence	Term	Description	Send to Vendor?
10	ACKNMINTA	ACKNOWLEDGMENT AND ACCEPTANCE	<input checked="" type="checkbox"/>

Details

Sequence: 10
Term: ACKNMINTA
Description: ACKNOWLEDGMENT AND ACCEPTANCE OF ORDER
Send to Vendor?

- **New Row**, allows you to add from an existing list of payment term one at a time.
- **Select Terms**, Allows you to select from a list of terms in multiples if desired.
- Second Screen:
- **Example:** After clicking new row, you have an option to select a given Terms code that returns to the contract line as shown.

Blanket Contract - Managing Payment Terms

The screenshot shows the 'Terms and Conditions' application interface. On the left is a navigation sidebar with options like 'Go To Applications', 'Available Queries', 'All Records', 'Common Actions', 'Save Terms and Conditions', 'Clear Changes', and 'More Actions'. The main area is divided into two sections: 'Organizations' and 'Terms and Conditions for EAGLENA'.

Organizations Table:

Organization	Description
EAGLENA	EAGLE Inc. North America
EAGLESA	Eagle South America, Inc.
EAGLEUK	European Headquarters of Eagle, Inc.
POOKSITE	The coolest place on earth
JASONORG	Jason Training Org

Terms and Conditions for EAGLENA Table:

Term	Description	Type	Editable?	Default on PO?
ACKNOINT	ACKNOWLEDGMENT AND ACCEPTANCE	PURCH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ASSIGNM	ASSIGNMENT/SUBCONTRACTING	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUYERSPR	BUYER'S PROPERTY IN SELLER'S POSI	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CANCELLA	CANCELLATIONS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CHANGES	CHANGES/AMENDMENTS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
COMPLIANC	COMPLIANCE WITH LAWS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONDUCT	STANDARDS OF CONDUCT	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
CONTRCTL	LAW OF THE CONTRACT	CONTRACT	<input type="checkbox"/>	<input type="checkbox"/>
FORCEMAJ	DELIVERY/FORCE MAJEURE	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
INDEINITY	INDEINITY	PURCH	<input type="checkbox"/>	<input type="checkbox"/>

This screenshot shows the same 'Terms and Conditions' application but with a detailed view of a term selected. The 'Organizations' list is visible at the top. Below it, the 'Terms and Conditions for EAGLENA' table is shown with a new row highlighted in blue, indicating a new term being added.

Terms and Conditions for EAGLENA Table (New Row):

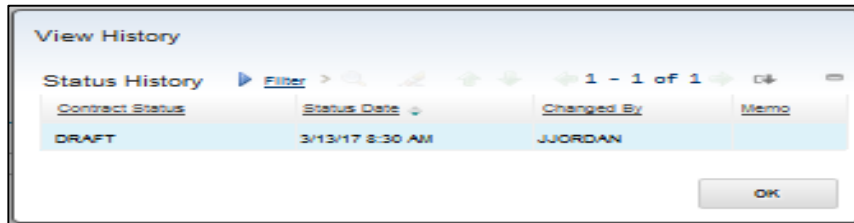
Term	Description	Type	Editable?	Default on PO?
			<input type="checkbox"/>	<input type="checkbox"/>

Details Section:

Term: Editable?
 Type: Default on PO?

- **Navigations:** Contract – Term & Conditions
- **New Row,** This allow you to create a new Terms and Conditions code or manage an existing Terms and Condition Code.
- **Terms,** Identifies the term or condition. This value must be unique for all terms.
- **Description,** Describes the term or condition. To enter or view additional information, click the Long Description button.
- **Type,** Identifies the type of term or condition. The type is user-defined.
- **Editable,** Specifies whether the term can be edited when accessed from other applications. If the check box is selected, users can edit the term when accessed from other applications. If the checkbox is cleared (the default), users cannot edit the term in other applications.
- **Default on PO,** Specifies whether the term will appear on new POs by default. If the check box is selected, the term will appear as a default term on new POs. If the checkbox is cleared, the term will not appear by default on new POs.

Blanket Contract – More Actions



The screenshot shows a 'View History' dialog box with a table of contract status changes. The table has four columns: 'Contract Status', 'Status Date', 'Changed By', and 'Memo'. There is one row of data showing a 'DRAFT' status change on '3/13/17 8:30 AM' by 'JJORDAN'. An 'OK' button is located at the bottom right of the dialog box.

Contract Status	Status Date	Changed By	Memo
DRAFT	3/13/17 8:30 AM	JJORDAN	

- View History, This allow you to see all the history associated with the status changes of the contract.

Blanket Contract – More Action - Copy Lines from PRs

Copy PR Lines To Contract

PR Line Items Filter 1 - 15 of 42

<input type="checkbox"/> PR	Company	Item	Description	Quantity	Unit Cost	Requested By	Required Date	Status	Copy to Contract?
<input type="checkbox"/>	1004	BEK	0-7205 Valve, Needle- 1/4 in	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	217213 Plate, Stainless Steel	2.00	7.59	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	231177 Guide- Carton Machine	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	335029 Hub- 2 in Dia	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	570-72 Valve, Needle- 2M-V4IN	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	6-L203 Tee, Steel, Male Thread- 1/2 in	2.00	3.79	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	900810 Lubricator Assembly	1.00	3.79	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1004	BEK	G23117 Carton Guide- Chain Wash Machine	2.00	2.50	LIBERI	2/5/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1005	GST	X0IP-3000 Gasket- E330	2.00	1.10	LIBERI	2/7/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1005	GST	X00X-1500 Guard, For Gast Pump- AC-683	1.00	6.00	LIBERI	2/7/99	APPR	<input type="checkbox"/>
<input type="checkbox"/>	1006	ATI	217213 Plate, Stainless Steel	2.00	7.59	LIBERI		APPR	<input type="checkbox"/>
<input type="checkbox"/>	1006	ATI	S84-L0 Lockwasher- 1/2 in	1.00	625.00	LIBERI		APPR	<input type="checkbox"/>
<input type="checkbox"/>	1007		4500-5 PDA (Sales)	50.00	0.00	WILSON	12/8/04	APPR	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1008	DATACHIP	D650 Series II Laptop	2.00	1,950.00	WILSON		WAPPR	<input type="checkbox"/>
<input type="checkbox"/>	1009	DATACHIP	D650 Series II Laptop	3.00	1,950.00	WILSON		WAPPR	<input type="checkbox"/>

OK Cancel

- **Copy Lines From PRs**, this give a buyer the option to copy PR lines that exist for the vendor on the contract by using the filter option on the Copy PR lines To Contract screen.

Blanket Contract – More Action - Copy Lines from POs

Copy PO Lines To Contract

Filter > 1 - 15 of 170

<input type="checkbox"/>	PO	Revision	Company	Item	Description	Quantity	Storeroom	Work Order	Requested By	Required Date
<input type="checkbox"/>	1005	0	GCE	29331	Building Thermostat	2.00	PKG			7/31/96
<input type="checkbox"/>	1000	0	ATI	560-00	Tubing, Copper-1 in ID X .030 in Wall	3.00	CENTRAL			
<input type="checkbox"/>	1031	0	HELUWIG	PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	1.00	CENTRAL		SMITH	
<input type="checkbox"/>	B4194	0	ATI	117084	Shaft- 1 inch Dia	8.00	CENTRAL		SANTANA	6/3/01
<input type="checkbox"/>	B4230	0	ATI	53-143	V-Belt- 1/2 in, 30 In Circumference	12.00	CENTRAL		SANTANA	9/16/01
<input type="checkbox"/>	1085	0	GOODYEAR	11R22.5G8-5	Goodyear 11R22.5 G327 Steer Tire	40.00	ATLANTA		WILSON	
<input type="checkbox"/>	B4230	0	ATI	117084	Shaft- 1 inch Dia	10.00	CENTRAL		SANTANA	9/16/01
<input type="checkbox"/>	1026	0	OFFRUIS	231177	Guide- Carton Machine	1.00	CENTRAL		LIBERI	
<input type="checkbox"/>	1009	0	IR	PUMP100	Centrifugal Pump 100 GPM, 60 FT-HD	1.00	CENTRAL		WILSON	1/18/97
<input type="checkbox"/>	1021	0	KENNEDY	560-00	Tubing, Copper-1 in ID X .030 in Wall	1.00	CENTRAL		LIBERI	
<input type="checkbox"/>	5197	0	HELUWIG	11453	Seal, Mechanical, Self Aligning- 1 in ID	1.00	CENTRAL		LIBERI	10/25/95
<input type="checkbox"/>	1061	0	DATACHIP	D650	Series II Laptop	15.00	HARDWARE		WILSON	10/6/04
<input type="checkbox"/>	1082	0	COMPDEP	ANTIVIRUS	Antivirus software	50.00	SOFTWARE		WILSON	10/12/04
<input type="checkbox"/>	A3312	0	GST	XMP-7000	Rotor And Shaft- AW508, 3 in Dia	5.00	CENTRAL		SANTANA	5/13/01
<input type="checkbox"/>	A3249	0	GST	XMP-3500	Cylinder, Hydraulic- AA267	5.00	CENTRAL		SANTANA	11/29/00

pk Cancel

- **Copy Lines From POs**, this give a buyer the option to copy PO lines that exist for the vendor on the contract by using the filter option on the Copy PR lines To Contract screen.

Creating an RFQ from the Blanket Contract

Create RFQ

Select line items to be included on the RFQ by selecting the checkbox on the rows or select the checkbox on the header to select all line items. Add the default charge values for the selected lines in the bottom section. Click OK to create the RFQ with the selected line items and return to the contract.

RFQ: 1007 TEST FOR VALUO

Autonumber

Contract Lines Filter 1 - 3 of 3

Line	Item	Description	Order Unit	Issue Unit	Conversion Factor	Manufacturer	Model	Catalog #
<input type="checkbox"/>	1	VAL103	SERVICE TEST ITEM	HOURS				SERVICE1
<input type="checkbox"/>	2	VAL101	TEST ITEM 2	EACH				BRD4320
<input type="checkbox"/>	3	VAL100	TEST ITEM 1	EACH				BAC123L

RFQ Charge Values

Work Order: Storeroom:

Location: GL Debit Account:

Asset: Site: BEDFORD

OK Cancel

- **Create RFQ:**
- **RFQ**, A unique identifier for this RFQ.
- **Description**, A brief description of this RFQ.
- **Auto Number**, this button when clicked will auto create the RFQ number.
- **Contract Lines:**
- **Note:** Contract lines must be selected to copy them to the RFQ lines.
- **Contract Lines**, this option allows you to select all line from the contract, or some of the lines from the contract to be copied to the RFQ. If you want all line click the box on the header, but if you only want some of the lines click the box beside the specific lines.
- **Order Units**, Non-persistent field to hold the order unit value
- **Conversion Factor**, the conversion factor should follow the Order Units, it is best to manage changes on the RFQ line so the value select will be persistent.
- **RFQ Change Values:**
- **Work Order**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Location**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Asset**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Storeroom**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **GL Debit Account**, if value is entered it will default to the RFQ and on to the PO lines when the PO is created.
- **Site**, defaults based on the users default site.
- **OK**, click OK to create the RFQ
- **Cancel**, click cancel to roll back and discontinue creation of the RFQ.

Creating an Release PO from the Purchase Contract

Create Release PO

To create a release purchase order from the current contract, specify a new PO number manually or use the Autonumber button and optionally specify the PO's description. Select one or more line items to be included on the Release PO by selecting the checkbox on the rows or select the checkbox on the header to select all line items. Add the default charge values for the selected lines in the bottom section. Click OK to create the Release PO with the selected line items and return to the contract.

PO:

Description:

Vendor:

Name:

Contract Lines Filter > 1 - 1 of 1

<input type="checkbox"/>	Line	Item	Description	Order Unit	Quantity	Issue Unit	Conversion Factor	Manufacturer	Model	Catalog #
<input checked="" type="checkbox"/>	1		Service Test Line	HOURS	1.00		1.00			

Release Charge Values

Work Order: Storeroom:

Location: GL Debit Account:

Asset: Site:

- **Create Release PO:** The create release PO must be set on the properties tab of the contract in order to create a release PO.
- **PO,** A unique identifier for this Release PO.
- **Description,** A brief description of this RFQ.
- **Vendor,** this value will default from the contract.
- **Auto Number,** this button when clicked will auto create the Release PO number.
- **Contract Lines:**
 - **Note:** Contract lines must be selected to copy them to the RFQ lines.
 - **Contract Lines,** this option allows you to select all line from the contract, or some of the lines from the contract to be copied to the Release PO Lines. If you want all line click the box on the header, but if you only want some of the lines click the box beside the specific lines.
 - **Order Units,** Non-persistent field to hold the order unit value
 - **Conversion Factor,** the conversion factor should follow the Order Units, it is best to manage changes on the RFQ line so the value select will be persistent.
- **Release Change Values:**
 - **Work Order,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Location,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Asset,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Storeroom,** if value is entered it will default to the Release PO lines when the PO is created.
 - **GL Debit Account,** if value is entered it will default to the Release PO lines when the PO is created.
 - **Site,** defaults based on the users default site.
 - **OK,** click OK to create the Release PO
 - **Cancel,** click cancel to roll back and discontinue.

Viewing and Managing Release PO's from the purchase contract

View Release Costs

Release Costs

Total Cost: 0.00
Amount on Order: 60.00
Number of Uncommitted Releases: 0
Amount Received: 0.00
Number of Committed Releases: 1
Amount Remaining: -60.00
Uncommitted Cost: 0.00
Invoice Variance: 0.00
Committed Cost: 60.00

Purchase Orders Filter 1 - 1 of 1

PO	Release #	Description	Site	Ordered Date	Status	Receipts	Total Cost
1096	1	Testing	BEDFORD	2/23/17 12:41 F	APPR	NONE	62.70

OK

- **View Release Costs**, you have the ability to view all Release PO cost and status within the contract.
- **Purchase Orders**, you can click the icon to the right of the PO number field and it will link you to the release PO.
- **OK**, click OK to close the Release PO dialog.
- **Lessons learned:** The only way to create a Release PO is from a contract. If you want release PO to be approved and sent to the vendor as other standard type PO's the Release Type must include in workflow and e-mail communications.

Viewing RFQ and PR Lines copied to the Purchase Contract as well as invoice lines

View RFQ Line Items

RFQ Lines [Filter](#) > 0 - 0 of 0

Line	RFQ	RFQ Line	Item	Description	Quantity	Unit Cost	Line Cost
There are no rows to display.							

OK

View PR Line Items

PR Lines [Filter](#) > 0 - 0 of 0

Line	PR	PR Line	Item	Description	Quantity	Unit Cost	Line Cost
There are no rows to display.							

OK

View Invoice Lines

Invoice Lines [Filter](#) > 1 - 1 of 1

Invoice	Invoice Line	Company	Quantity	Unit Cost	Line Cost
1088	1	BURSAW	1.00	60.00	60.00

OK

- **First Screen:**
- **View RFQ Line Items**, If line were add to a contract from and RFQ they can always be view by select view RFQ lines.

- **Second Screen:**
- **View PR Line Items**, If line were add to a contract from and PR they can always be view by select view RFQ lines.

- **Third Screen:**
- **View Invoice Lines**, Invoice lines can be viewed once the invoice has be created.

Purchase Contract Authorize Sites

Authorize Sites

To add a site that is authorized to use this contract use New Row and add an individual site or use Select Sites to select multiple sites simultaneously. If required, modify the default Company and Bill To information for each authorized site. Click OK to authorize the specified sites and return to the contract.

Sites Filter 1 - 1 of 1

Vendor	Site	Organization	Default?	Bill To	Attention
BURSAW	BEDFORD	EAGLENA	<input type="checkbox"/>	BEDFORDM	KATHYB

Select Sites New Row

OK Cancel

- **Authorize Sites**, At least one site must be authorized to change the contract status to APPR.
- **New Row**, click the new row button will all you to select one site at a time.
- **Select Sites**, click the Select Sites button will all you to select multiple sites at once.
- **OK**, clicking OK to add the authorized site or sites.
- **Cancel**, click cancel to roll back and discontinue.

Purchase Contracts and managing commodity groups and Code

Associate Commodities

To associate commodities with this contract use New Row and add an individual commodity or use Select Commodities to select multiple records simultaneously.

Commodity Groups **Filter** > 0 - 0 of 0

Commodity Group	Description	Service?
There are no rows to display.		

Select Commodity Groups New Row

Commodity Codes for Commodity Group **Filter** > 0 - 0 of 0

Commodity Code	Description	Service?
There are no rows to display.		

Select Commodity Codes New Row

OK Cancel

- **Associate Commodities:**
- **New Row**, commodities groups can be associated with the purchase contracts one at a time by selecting the New Row button. Service commodity groups can also be associated.
- **Select Commodity Groups**, multiple commodities groups can be associated with purchase contracts by selecting the Select commodity groups button. Service commodity groups can also be associated.

Associate Commodities

To associate commodities with this contract use New Row and add an individual commodity or use Select Commodities to select multiple records simultaneously.

Commodity Groups **Filter** > 1 - 2 of 2

Commodity Group	Description	Service?
31171500	MOTOR	<input type="checkbox"/>

Details

Commodity Group:
31171500 BEARINGS

Service?

Select Commodity Groups New Row

Commodity Codes for Commodity Group 31171503 **Filter** > 1 - 1 of 1

Commodity Code	Description	Service?
31171503	WHEEL BEARINGS	<input type="checkbox"/>

Select Commodity Codes New Row

OK Cancel

- **Second Screen:**
- **New Row**, commodity codes for the commodity group selected can be added one at a time by clicking New Row.
- **Select Commodity Codes**, multiple commodity codes for the commodity group selected can be added by clicking the select commodity codes button.
- **Ok**, clicking OK will associate the commodity codes with the purchase contract.
- **Cancel**, click cancel to roll back and discontinue.

Purchase Contract SLA's

Associate SLAs

To associate an SLA with this contract use New Row and add an Individual SLA or use Select SLAs to select multiple records simultaneously. Click OK to associate the specified SLAs and return to the contract.

Associate SLAs

SLA	Description	Vendor	Start Date	End Date	Type	Status
1024	Vendor Labor Certification Renewal Agreements	DATACHIP	7/1/04 12:00 AM	8/30/06 12:00 AM	VENDOR	ACTIVE

Select SLAs New Row

OK Cancel

- **Associate SLA's:**
- **New Row**, by clicking new row you can select existing SLA's one at a time.
- **Select SLA's**, by clicking Select SLA's you can select multiple existing SLA's.
- **OK**, click OK to add the SLA's selected to the purchase contract.
- **Cancel**, click cancel to roll back and discard.

Purchase Contract Revision

Revise Contract

Enter a description for the revised contract. Click OK when finished.

Contract Reference: 1039

Revision: 1

OK Cancel

View Revision History

Contract Details Filter 1 - 4 of 4

Revision	Status	Company	Start Date	End Date	Maximum Amount	Changed By	Changed Date	Revision Comments
3	APPR	GCE	1/1/04	12/31/05		WILSON	6/29/07 10:24 AM	additional items provided
2	REVISD	GCE	1/1/04	12/31/05		WILSON	6/29/07 10:24 AM	item no longer available - removing from contract
1	REVISD	GCE	1/1/04	12/31/05		WILSON	9/27/04 4:28 PM	4% price increase
0	REVISD	GCE	1/1/04	12/31/05		WILSON	9/23/04 5:01 PM	

Contract Line Details Filter 1 - 8 of 15

Line	Revision	Revision Status	Line Type	Item	Description	Quantity	Unit Cost	Line Cost
10	3	ADDED	ITEM	L-CABLE	Coaxial PVC LAN cable	1.00	4.33	4.33
9	3	CHANGED	ITEM	140-2919 Relay	Main Junction Box	1.00	280.00	280.00
9	2		ITEM	140-2919 Relay	Main Junction Box	1.00	280.00	280.00
8	2		ITEM	134-3124 MOUNTING	GP BATTERY	1.00	29.64	29.64
8	3	CHANGED	ITEM	134-3124 MOUNTING	GP BATTERY	1.00	29.64	29.64
7	3	CHANGED	ITEM	134-3154 MOUNTING	GP - JUNCTION BOX	1.00	15.08	15.08
7	2		ITEM	134-3154 MOUNTING	GP - JUNCTION BOX	1.00	15.08	15.08
6	2		ITEM	EB12	12 Volt Battery	1.00	16.54	16.54

pk

- **Revise Contract:**
 - **Description**, enter a description, there is a long description associated with this field also.
 - **OK**, click OK to commit the Revision.
 - **Cancel**, click cancel to roll back and discard.
-
- **Second Screen:**
 - **View Revision History**, click view revision history to see the history of all revision associated with the purchase contract.
 - **OK**, click OK to close dialog.

Purchase Contract Apply Price Adjustment

Apply Price Adjustment

Select the lines whose price you would like to change. Indicate with a positive or negative percentage, the change that will be applied to the selected lines. Click OK for changes to take affect.

Adjustment %:

Contract Lines Filter 1 - 2 of 2

<input type="checkbox"/>	Line	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost	New Unit Cost	New Line Cost
<input checked="" type="checkbox"/>	1		SERVICE TEST LINE	1.00	HOURS	65.00	65.00		
<input type="checkbox"/>	2	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00		

Apply Price Adjustment

Select the lines whose price you would like to change. Indicate with a positive or negative percentage, the change that will be applied to the selected lines. Click OK for changes to take affect.

Adjustment %:

Contract Lines Filter 1 - 2 of 2

<input type="checkbox"/>	Line	Item	Description	Quantity	Order Unit	Unit Cost	Line Cost	New Unit Cost	New Line Cost
<input checked="" type="checkbox"/>	1		SERVICE TEST LINE	1.00	HOURS	65.00	65.00		
<input type="checkbox"/>	2	FREIGHT	FREIGHT	1.00	EACH	3,500.00	3,500.00		

- **Apply Price Adjustment:**
- The purchase contract header must be in **DRAFT, WAPPR, or PNDREV** to apply a price adjustment.
- **Adjustment %**, enter a positive or negative value in the percentage field (**see second screen for negative entry**).
- **Contract Line**, select the line or lines to apply the price change too.
- **OK**, click OK to apply the price change to the selected lines.
- **Cancel**, click cancel to roll back and discard.

Purchas Contract – Change Line Status

Change Line Status

Indicate a new line status to apply to selected contract lines. To select lines, select the checkbox on the rows whose status will be changed. To select all lines, select the checkbox on the header. Click OK to apply the status change and return to the contract.

Line Status:

Contract Lines Filter 1 - 8 of 8

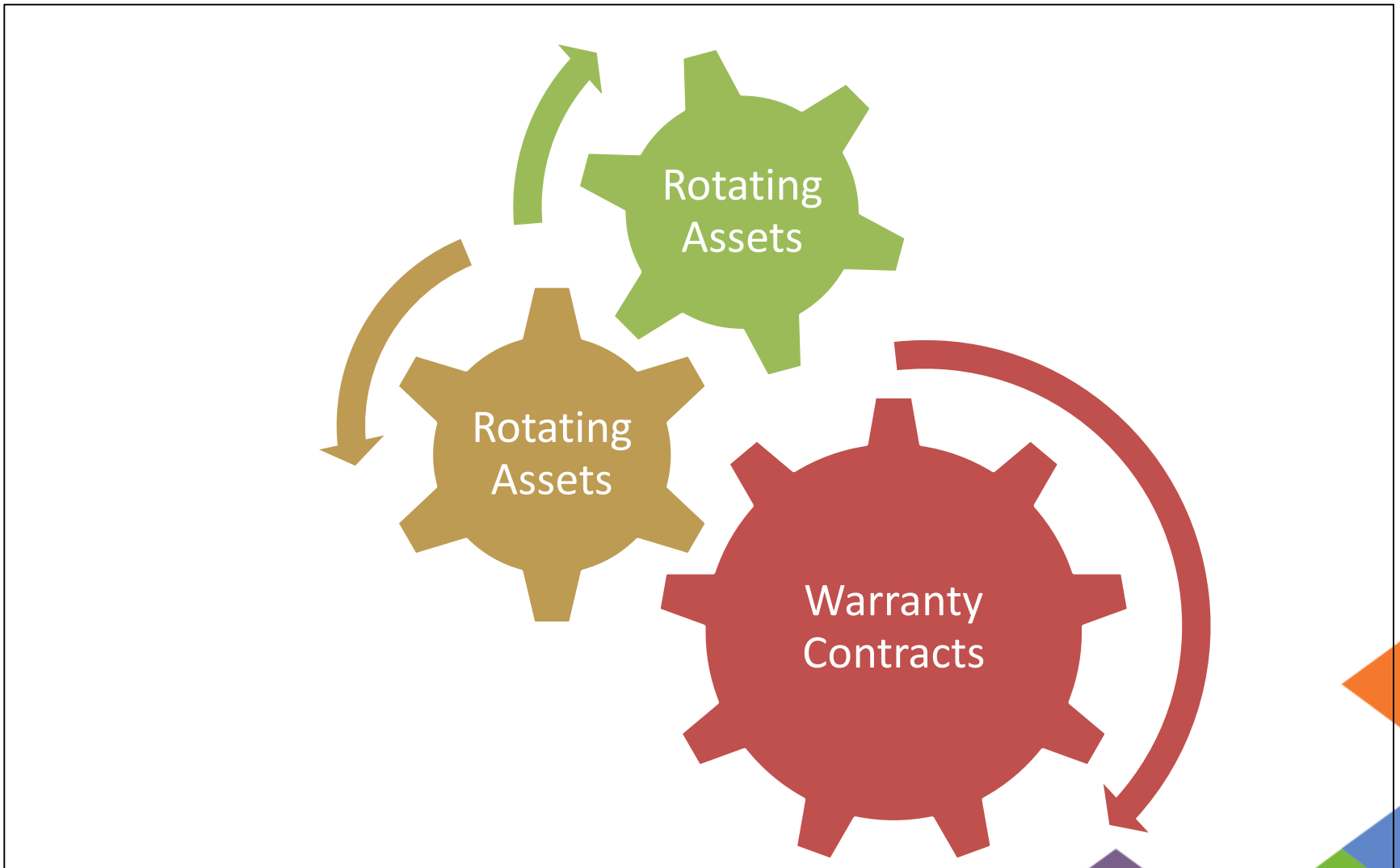
<input type="checkbox"/>	Line	Item	Description	Status
<input checked="" type="checkbox"/>	1	11406	AC Spark Plug	APPR
<input type="checkbox"/>	3	11241	Contactor, Renewal Kit	APPR
<input checked="" type="checkbox"/>	4	29331	Building Thermostat	APPR
<input checked="" type="checkbox"/>	6	EB12	12 Volt Battery	APPR
<input type="checkbox"/>	7	134-3154	MOUNTING GP - JUNCTION BOX	APPR
<input type="checkbox"/>	8	134-3124	MOUNTING - GP BATTERY	APPR
<input type="checkbox"/>	9	140-2919	Relay - Main Junction Box	APPR
<input type="checkbox"/>	10	L-CABLE	Coaxial PVC LAN cable	APPR

More Actions

- Create Release PO
- View Release Costs
- View RFQ Line Items
- View PR Line Items
- View Invoice Lines
- Authorize Sites
- Associate Commodities
- Associate SLAs
- Revise Contract
- View Revision History
- Apply Price Adjustment
- Change Line Status
- Unit of Measure and Conversion >
- Attachment Library/Folders >
- Duplicate Purchase Contract
- Add to Bookmarks

- **Change Line Status:**
 - The purchase contract must be in the status of APPR to use the change line status. This allows to change the status of specific lines without revising the contract.
 - **Line Status**, the domain beside the field allows one to select one of the following line statuses for the contract line APPR, CANCEL, DRAFT, WAPPR.
 - **OK**, Click OK to apply the line status change.
 - **Cancel**, click cancel to roll back and discard.
-
- **Second Screen:**
 - **Units of Measure**, add modify unit of measure and add modify unit of measure conversion can be managed from More Actions
 - **Attachment Library folders**, can be managed from More Actions
 - **Duplicate Purchase Contract**, can be managed from More Actions.
 - **Add to Bookmarks**, can be managed from More Actions.

Warranty Contracts



Warranty/Service Contracts

- Warranty Contracts application
- In the Warranty Contracts application, you create warranty contracts. A warranty contract defines the agreement to maintain one or more assets with an outside service provider for a fee or a scheduled set of payments. The contract also tracks warranty information for assets and locations by time or meter.
- Service contracts
- You also use a warranty contract to create a service contract. A service contract indicates that an outside service provider maintains one or more assets. Payment for service can be made with a single fee or with a scheduled set of payments.

Warranty/Service Contracts Header

In the Warranty Contracts application, you create warranty contracts. A warranty contract defines the agreement to maintain one or more assets with an outside service provider for a fee or a scheduled set of payments. The contract also tracks warranty information for assets and locations by time or meter.

The screenshot shows the 'Contract' tab of the Warranty/Service Contracts application. The form contains the following fields and values:

Field	Value
Contract	1058
Description	SERVICE TEST
Type	SERVICE
Status	DRAFT
Revision	0
Organization	EAGLENA
Attachments	
Master Contract	1049
Start Date	3/15/17
Total Cost	0.00
Vendor Reference #	
End Date	3/15/18
Currency	USD
Buyer	
Renewal Date	1/15/18
Total Base Cost	0.00

- **Contract field**, this field can be auto populated, or it can remain manual entry.
- **Description field**, there is a 100 character field on the purchase contract.
- **Revision Number**, Revision number of the contract. This number indicates the number of times the contract has been revised. A contract that has been created and not revised will show a number of 0.
- **Revision Description**, Comments associated with the current revision of this contract.
- **Type**, default Warranty, but can be multiple **Warranty** or **Service**.
- **Status**, default to DRAFT when creating a new contract.
- **Organization**, Organization identifier.
- **Attachments**, document liberty
- **Master Contract**, The unique identification number of a Master Contract from which this contract was created.
- **Vendor Reference #**, this field provides a place to enter a unique identifier for the vendor.
- **Buyer**, this field can be configured to show only buyers as a option.
- **Start Date**, this is the date when the contract will become active, this can be a future date.
- **End Date**, this is the date when the contract will become inactive.
- **Renewal Date**, this a reminder date that should be in advance of the end date so you have time to renew the contract if desired.
- **Total Cost**, The sum of all the costs on the contract lines on the current master contract.
- **Currency**, this is the base default, but it may change once the vendor is added, depending on country the vendor is located in.
- **Total Base Cost**, Cost of the entire contract in base currency 1.

Warranty/Service Contracts Header Continued

Vendor

Vendor:	BURSAW >> Bursaw Oil Co.	Freight Terms:	
Address:	P.O. BOX 668	Payment Terms:	2/10 NET 30
City:	EL DORADO		
State/Province:	AR		
ZIP/Postal Code:	71730		
Contact:	GENE PETERS		
Phone:	(501) 555-5781		
Customer #:	5454670		

- **Vendor**, A unique code indicating the vendor of the current warranty contract.
- **Address**, The company's street address.
- **City**, The city where the company is located.
- **State Province**, The state or province where the company is located; use either the two-character code or full spelling.
- **Zip**, The company's zip or postal code.
- **Contract**, The name of the person employed by the vendor to contact with queries about this contract.
- **Phone**, Telephone number of the company or contact.
- **Customer #**, The unique number issued by the vendor to identify our company.
- **Freight Terms**, The agreed upon terms related to shipping and receiving associated with this contract.
- **Payment Terms**, The agreed upon terms related to monetary payments associated with this contract.

Warranty/Service Contracts

The screenshot displays a software interface for managing contracts. At the top, there are tabs for 'List View', 'Contract', 'Properties', 'Contract Lines', 'Associated Assets', and 'Terms and Conditions'. The 'Properties' tab is active. Below the tabs, there are several input fields and dropdown menus. The 'Contract' field contains '1058', and the 'Description' field contains 'SERVICE TEST'. The 'Type' dropdown is set to 'SERVICE', and the 'Status' dropdown is set to 'DRAFT'. The 'Revision' field contains '0'. The 'Organization' dropdown is set to 'EAGLENA', and the 'Total Cost' field contains '0.00'. Below these fields, there is a section titled 'Properties' with several checkboxes and input fields. The 'Extendable?' checkbox is unchecked. The 'Vendor Termination Allowed?' checkbox is checked. The 'Payment Schedule?' checkbox is checked. The 'Condition for Extension' field is empty. The 'Vendor Notification Period' field is empty. The 'Process Claim?' checkbox is checked. The 'Extension Period' field is empty. The 'Customer Termination Allowed?' checkbox is checked. The 'Customer Notification Period' field is empty.

- **Extendable**, Checking this box indicates that early termination by the vendor is allowed.
- **Condition for Extension**, Details any conditions that may exist for an extension.
- **Extension Period**, If the contract is extendable, this field indicates the auto extend period in days.
- **Vendor Termination Allowed**, Checking this box indicates that early termination by the vendor is allowed.
- **Vendor Notification Period**, If early termination is allowed by vendor, this indicates the number of days notice required
- **Customer Termination Allowed**, Checking this box indicates that early termination by the customer is allowed.
- **Customer Notification Period**, If early termination is allowed by customer, this indicates the number of days notice required.
- **Payment Schedule**, Checking this box indicates there is a payment schedule for this contract.
- **Process Claim**, Checking this box indicates a claim can be processed against this contract.

Warranty/Service Contracts

The screenshot displays a software interface for managing Warranty/Service Contracts. The main window is titled 'Contract Lines' and shows details for a contract named 'WARRANTY TEST' (Contract ID: 1057, Type: WARRANTY, Status: DRAFT). The contract is associated with the organization 'EAGLENA' and has a total cost of 0.00. Below the contract details, there is a table for 'Contract Lines' with one line item: Line 1, Service, Duration 3 MONTHS, Labor 100.00, Materials 100.00, Tools 100.00, and Covers Children? checked. Below this table is a 'Line Item' section for Line 1, Item 'GENERAL SERVICE', Line Type 'Service', and Line Cost 0.00. It also shows 'Duration' (3 MONTHS) and 'Covers Children?' checked. At the bottom, there is a 'Meter Lines for Contract Line 1' section with one meter line: Unit of Measure 'HOURS', Meter Duration 2,160.00.

- **Line**, A chronological number of each contract line.
- **Item**, Unique identifier for the item listed on the contract line.
- **Description**, A brief description of the entity on the contract line.
- **Line Type**, The value of line type could be Service or Standard **Service**.
- **Line Cost**, Extended or lump sum cost of this transaction line.
- **Duration**, Length of time between the beginning of the warranty period and the end of the warranty period.
- **Time Unit**, The measurement unit used to define the duration (days, months, years)
- **Covers Children**, Checking this box indicates the children of this asset are covered by the warranty.
- **Labor Coverage Percentage**, The percentage of labor covered by this warranty.
- **Materials Coverage Percentage**, The percentage of labor covered by this warranty.
- **Tools Coverage Percentage**, The percentage of labor covered by this warranty.
- **Labor Coverage Amount**, Monetary amount of labor covered by this warranty.
- **Materials Coverage Amount**, Monetary amount of labor covered by this warranty.
- **Tools Coverage Amount**, Monetary amount of labor covered by this warranty.
- **Unit of Measure**, Name of the measurement unit.
- **Meter Duration**, Duration of the meter. Indicated in the unit described in MEASUREUNIT.

Warranty/Service Contracts Associate Assets

The screenshot displays the 'Associated Assets' tab in a software application. At the top, there are tabs for 'List View', 'Contract', 'Properties', 'Contract Lines', 'Associated Assets', and 'Terms and Conditions'. The 'Associated Assets' tab is active, showing contract details: Contract: 1057, Revision: 0, Type: WARRANTY, Status: APPR, Organization: EAGLENA, and Total Cost: 0.00. Below this, there are sections for 'Assets/Locations' and 'Contract Lines for Asset/Location'. The 'Assets/Locations' section shows a table with one row: Asset: 26020, Asset Description: 24 Volt-DC Motor, Location: (empty), and Asset Type: (empty). The 'Contract Lines for Asset/Location' section shows a table with one row: Line: 1, Description: GENERAL SERVICE, Duration: 3 MONTHS, Start Date: 3/15/17, End Date: 6/15/17, and Covers Children?: checked. The 'Meters for Asset/Location' section is empty, showing 'There are no rows to display.'

- **Asset**, A unique identification number assigned to the asset indicated.
- **Description**, Describes the asset. To enter or view additional information, click the Long Description button.
- **Location**, Location to which the warranty applies.
- **Location Description**, The description of the location. To enter or view additional information, click the Long Description button.
- **Asset Status**, Status of the asset, for example, not ready, operating, or decommissioned.
- **Asset Type**, The predefined type of this asset.
- **Serial #**, Asset Serial Number
- **Line**, Contract Line Number
- **Description**, A description of the asset on this contract line.
- **Duration**, Duration of the warranty associated with this asset.
- **Time Unit**, Name of the measurement unit.
- **Start Date**, The reading logged at the start of the meter duration.
- **End Date**, End date of the warranty
- **Cover Children**, Checking this box indicates the children of this asset are covered by this warranty.
- **Meter**, Meter for which the current reading is being recorded.
- **Duration**, Duration of the meter. Will be in the unit of MEASUREUNIT.
- **Unit of Measure**, Name of the measurement unit.
- **End Reading**, End meter reading
- **Last Reading**, Last reading taken for this meter. This should be the same as the most recent meter reading. An asset that was used before it was added to the system will have an asset meter reading. The last meter reading for an existing asset can be used as the initial meter reading for that asset in the system.
- **Last Read Date**, Date of the last reading for this meter.

Warranty/Service Contracts

Contract: 1057 **WARRANTY TEST** Type: WARRANTY Status: DRAFT

Revision: 0 Organization: EAGLENA Total Cost: 0.00

Terms and Conditions Filter > 1 - 5 of 5

Sequence	Term	Description	Send to Vendor?
10	COMPLIANC	COMPLIANCE WITH LAWS	<input checked="" type="checkbox"/>
20	CONDUCT	STANDARDS OF CONDUCT	<input checked="" type="checkbox"/>
30	MINDTRYCL	MANDATORY CLAUSES REQUIRED UND	<input checked="" type="checkbox"/>
40	REPRODUC	REPRODUCTION OF DOCUMENTATION	<input checked="" type="checkbox"/>
50	WAIVER	WAIVER	<input checked="" type="checkbox"/>

Select Terms New Row

- Terms and Conditions application
- You use the Terms and Conditions application to specify and to maintain a library of terms and conditions. You can add the terms and conditions to a purchasing document or to a contract. Terms can contain information such as liability concerns, shipping and handling details, and delivery time expectations.
- The terms entered in the Terms and Conditions application are available from tabs in the purchasing and contract applications. From the tabs, you can select a term from the library to associate with a purchasing record or with a contract record.

Organizations Filter > 1 - 3 of 3

Organization	Description
EAGLENA	EAGLE Inc. North America
EAGLESA	Eagle South America, Inc.
EAGLEUK	European Headquarters of Eagle, Inc.

Terms and Conditions for EAGLENA Filter > 1 - 10 of 25

Term	Description	Type	Editable?	Default on POT
ACKNOGINT	ACKNOWLEDGMENT AND ACCEPTANCE	PURCH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ASSIGNMIN	ASSIGNMENT/SUBCONTRACTING	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUYERSPR	BUYER'S PROPERTY IN SELLER'S POSI	PURCH	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CANCELLA	CANCELLATIONS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CHANGES	CHANGES/AMENDMENTS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
COMPLIANC	COMPLIANCE WITH LAWS	PURCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CONDUCT	STANDARDS OF CONDUCT	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
CONTRCTL	LAW OF THE CONTRACT	CONTRACT	<input type="checkbox"/>	<input type="checkbox"/>
FORCEMAJ	DELIVERY/FORCE MAJEURE	PURCH	<input type="checkbox"/>	<input type="checkbox"/>
INDEMNITY	INDEMNITY	PURCH	<input type="checkbox"/>	<input type="checkbox"/>

New Row

Warranty/Service Contracts – More Actions

View History

Status History [Filter](#) > 1 - 2 of 2

Contract Status	Status Date	Changed By	Memo
APPR	3/15/17 9:56 AM	JJORDAN	
DRAFT	3/15/17 9:38 AM	JJORDAN	

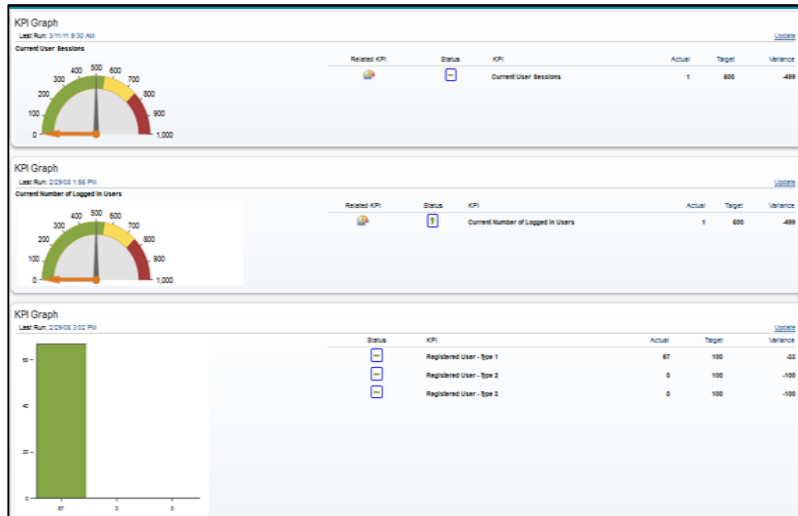
System Message

BMXAA0761E - The Manage Payments action can only be performed if the Payment Schedule flag is set to true. [More information](#)

- **View History**, click view history to see all the status change history

- **Manage Payments**, The Manage Payments action can only be performed if the Payment Schedule flag is set to true

Maximo KPIs, Start Center, KPI Manager, and KPI Viewer



KPI Configuration for Single Line Purchase Order

KPI Name: SINGLINEPO
Calculation Type: Decimal
Template: [Blank]

Calculate Trend? Calculate Trend Size: [Blank] Calculate Trend Status: [Blank]

Query Details

Select: select count(pomnum) from po
Where: where exists (select 1 from poline where po.ponum=poline.ponum group by poline.ponum having count(*)=1)

KPI Parameters

Target: 15.00
Is Active?
Caution At: 25.00
Alert At: 50.00
Created Date: 2/9/05 10:48 AM
Created By: WILSON
Last Updated: 2/9/05 10:48 AM

Graph Details

Last Run: 2/9/05 10:48 AM
Status: 48, Actual: 0, Last Reading: 15, Target: 33, Variance: [Blank]

KPI Viewer Joe Jordan

Find KPI Name

Advanced Search Save Query Bookmarks

Go To Applications

Available Queries

KPI Name	Description	Current Value	Target	Last Updated	Calculation Type	Application
KPI-1	PM Work Orders Overdue	356.00	5.00	8/24 3:05 PM	DECIMAL	
KPI-8	PM Performance	12.73	95	8/24 3:05 PM	PERCENT	
KPI-9	% Rework	0.00	2.00	8/24 3:05 PM	PERCENT	
KPI-10	Work Orders Overdue	433.00	15.00	8/24 3:05 PM	DECIMAL	
KPI-4	Open Work Orders Waiting Approval	191.00	25.00	8/24 3:05 PM	DECIMAL	
ADHOC	% Ad Hoc Reports	3.66	45.00	2/11/11 10:05 AM	PERCENT	
USERSESSIONS	Current User Sessions	1.00	500.00	3/11/11 9:30 AM	DECIMAL	
TYPE1USER	Registered User - Type 1	67.00	100.00	2/29/08 3:02 PM	DECIMAL	
TYPE2USER	Registered User - Type 2	0.00	100.00	2/29/08 3:02 PM	DECIMAL	
TYPE3USER	Registered User - Type 3	0.00	100.00	2/29/08 3:02 PM	DECIMAL	
CURRENTLOG	Current Number of Logged In Users	1.00	500.00	2/29/08 1:56 PM	DECIMAL	
SCHEDREP	Scheduled Report Jobs	0.00	65.00	2/11/11 10:12 AM	PERCENT	

KPI Viewer Joe Jordan

Find KPI Name

List View KPI Historical Trends Log Security

Go To Applications

Available Queries

KPI Name: KPI-8 PM Performance Application: [Blank]

Description: Percentage of completed to total PM Workorders. This metric only includes work orders with PM Type. It does not include task work orders.
Target Values: This percentage should be relatively high to show that PM work is being completed on a regular basis.
Recommended Schedule Run Time: You may want to schedule this KPI to run on a monthly or quarterly time period.
Intended Audience: Operations and Maintenance Managers, Supervisors, and Planners.

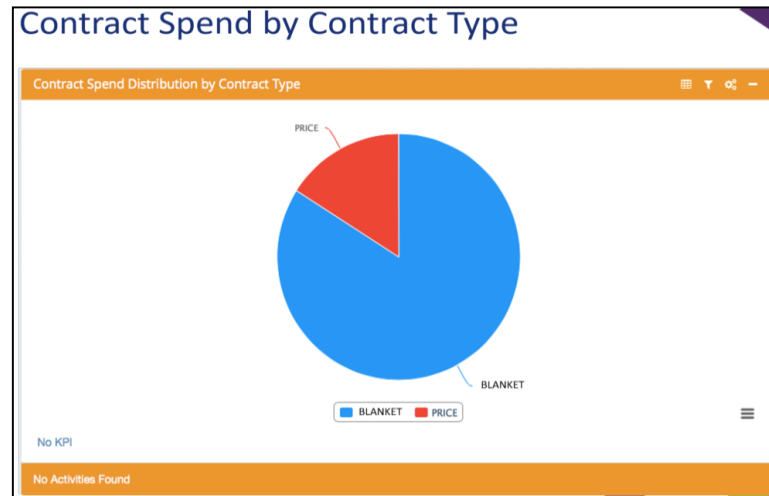
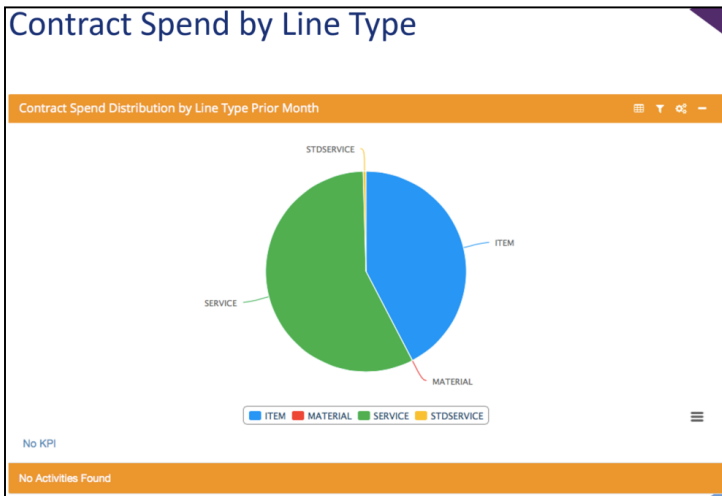
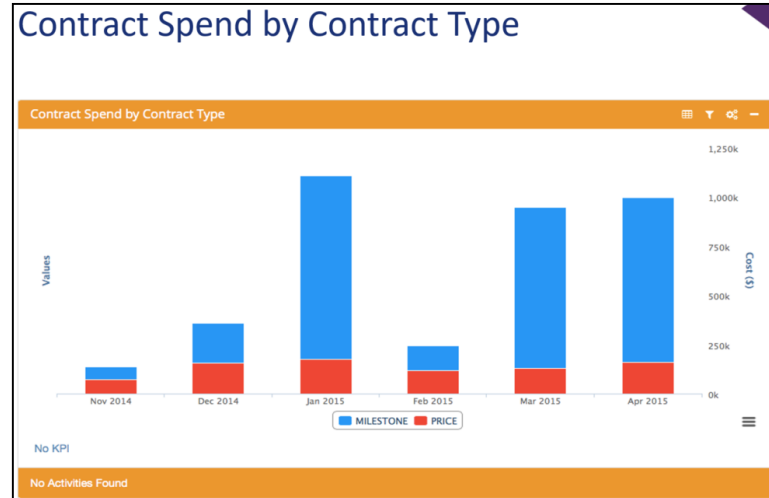
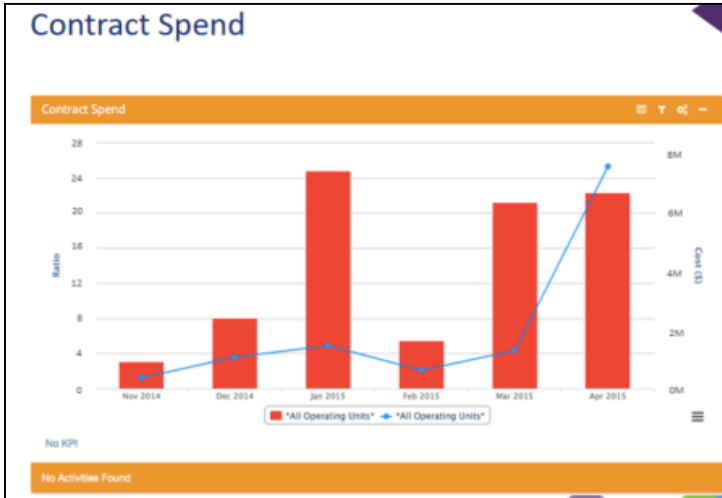
Current

Last Run: 8/24 3:05 PM

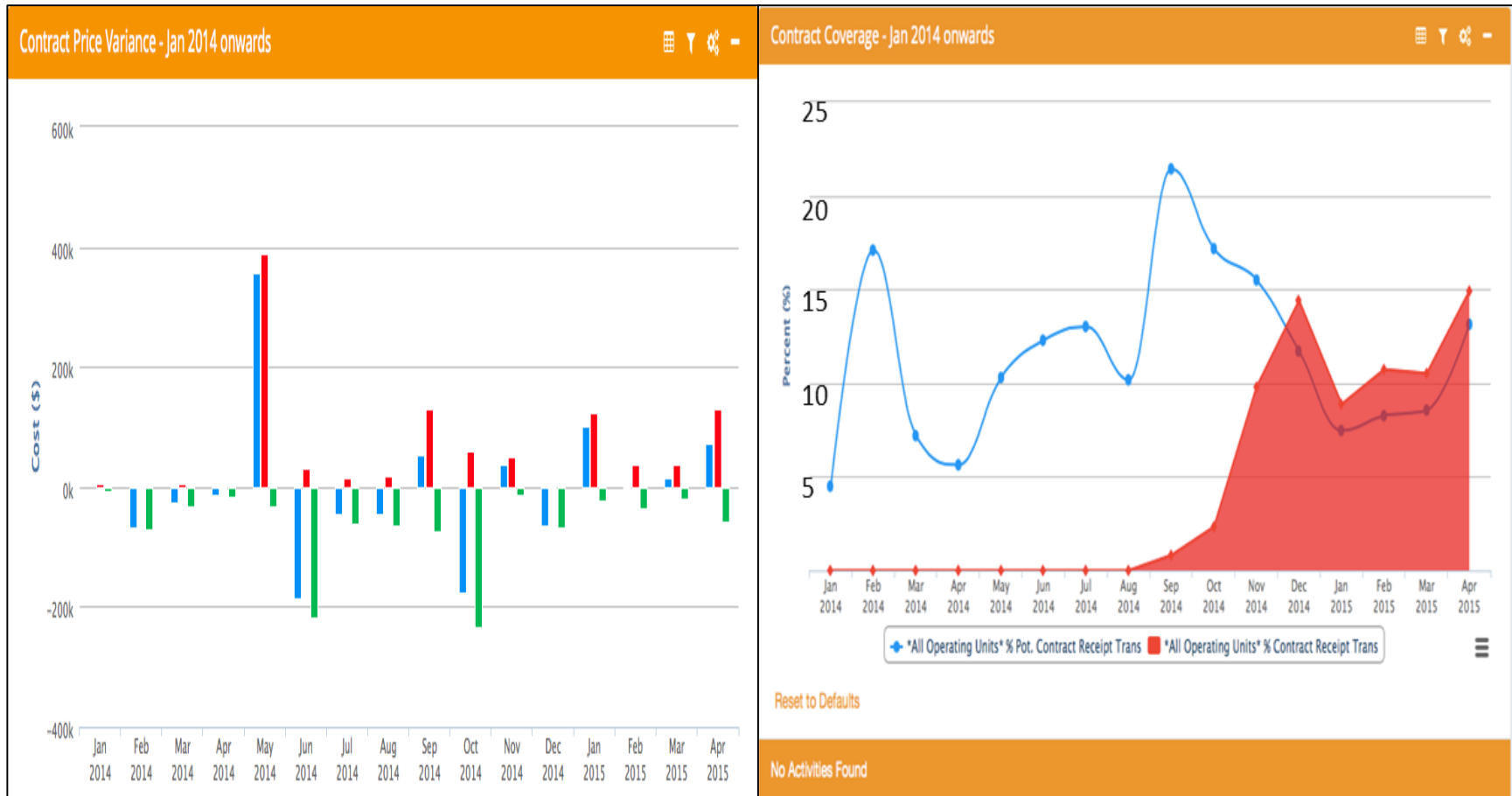
Status	Actual	Last Reading	Target	Variance	Last KPI Value	Calculation Type
↓	12.73	83	95	-82.27	83.00	PERCENT

Target: 95.00 Alert At: 80.00
Caution At: 90.00

Contract Metrics



Contract Metrics - continued



Maximo Technology for FYI



Platform Support – Maximo 7.6

	Supported	Deprecated
OPERATING SYSTEMS	<p>AIX 7.1 Windows Server 2012, 2012 R2 Red Hat Enterprise Linux 6,7 (x86-64 & zLinux) SUSE Linux Enterprise Server 11 (x86-64 & zLinux)</p> <p><u>NOTE: SOLARIS or HP-UX and 32-bit Linux versions are no longer supported</u></p>	<p>AIX 6.1 HP-UX 11i v3 Solaris 9,10, 11 Windows Server 2003, 2008, 2008 R2 Red Hat Enterprise Linux 5, 6 SUSE Linux Enterprise Server 10 ,11</p>
DATABASES	<p>IBM DB2 10.1, 10.5 (Workgroup and ESE) Oracle 11g Rel2, 12c Microsoft SQL Server 2012</p>	<p>IBM DB2 ESE 9.5, 9.7, 9.8 Oracle 10g Rel2, 11g Rel1, RAC 10g Microsoft SQL Server 2008, 2008 R2</p>
BROWSERS	<p>Internet Explorer 8, 9 Internet Explorer 10, 11 (standards mode) Mozilla Firefox 31 Google Chrome 36 Safari 7 (MAC only)</p> <p>JRE 1.7.0 fix pack 55, 65</p>	<p>Internet Explorer 7.0 Mozilla Firefox 3.6, 4.0, 10.0, 17.0, 24.0</p>
Application Servers	<p>IBM <u>WebSphere</u> 8.5, 8.5.5 Oracle <u>WebLogic</u> Server 12c</p> <p>JDK 1.7.0</p>	<p>IBM <u>WebSphere</u> 7.0, 8.0 Oracle <u>WebLogic</u> Server 10.3.3</p>
REPORTING	<p>BIRT 4.3.1 <u>Cognos</u> Business Intelligence Enterprise 10.2.1</p>	

IBM Maximo V7.6 Links

- [IBM Maximo 7.6 Announcement Letter](#)
- [Maximo 7.6 Resource Page](#)
- [Maximo 7.6 Videos from IBM](#)
- [Maximo 7.6 New Feature Demonstration - Cohesive](#)

Thanks for Attending

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