Maximize the Power of PeopleSoft Procurement Contracts and Strategic Sourcing Events

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Purchasing, Strategic Sourcing and Supplier Contract Management

July 18, 2019

Session #102120

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Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Maximize the Power of PeopleSoft Procurement Contracts and Strategic Sourcing Events

Agenda:

1 Strategic Sourcing Events

2 Procurement Contracts

3 Demo – Enhancements to Image 30

4 Payment Analysis

5 Additional Resources

6 Q & A

PeopleSoft
RECONNECT

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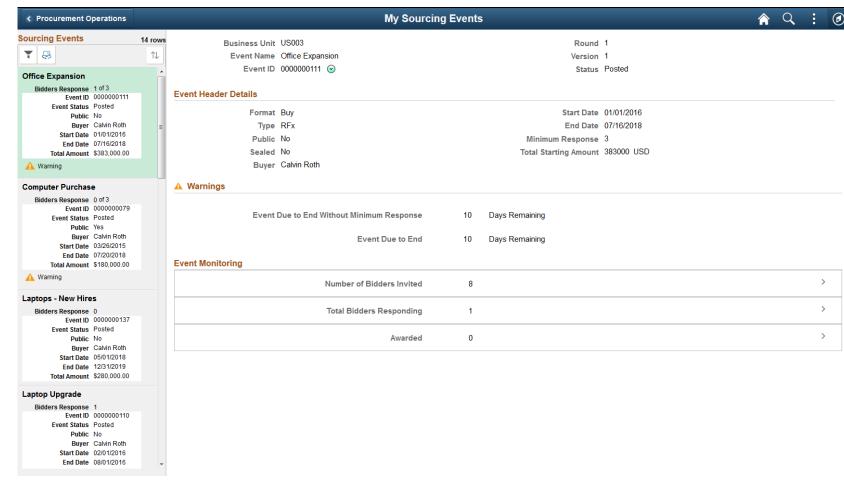
Maximize the Power of PeopleSoft Procurement Contracts and Strategic Sourcing Events

My Sourcing Events

- Tailor Search Results
  - Configurable User Preferences

- Notifications
  - Event Due to End
  - Minimum Bid Responses

- View Activity
  - Invitations Accepted
  - Responses (not Sealed)
  - Award Summary
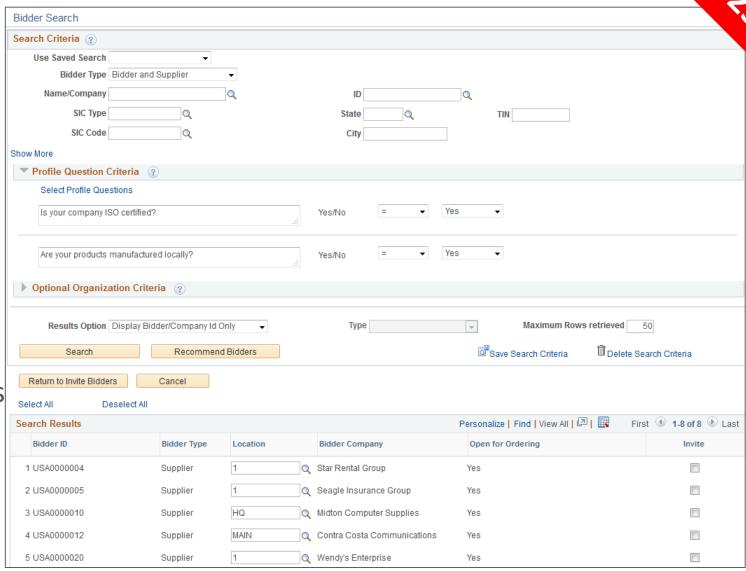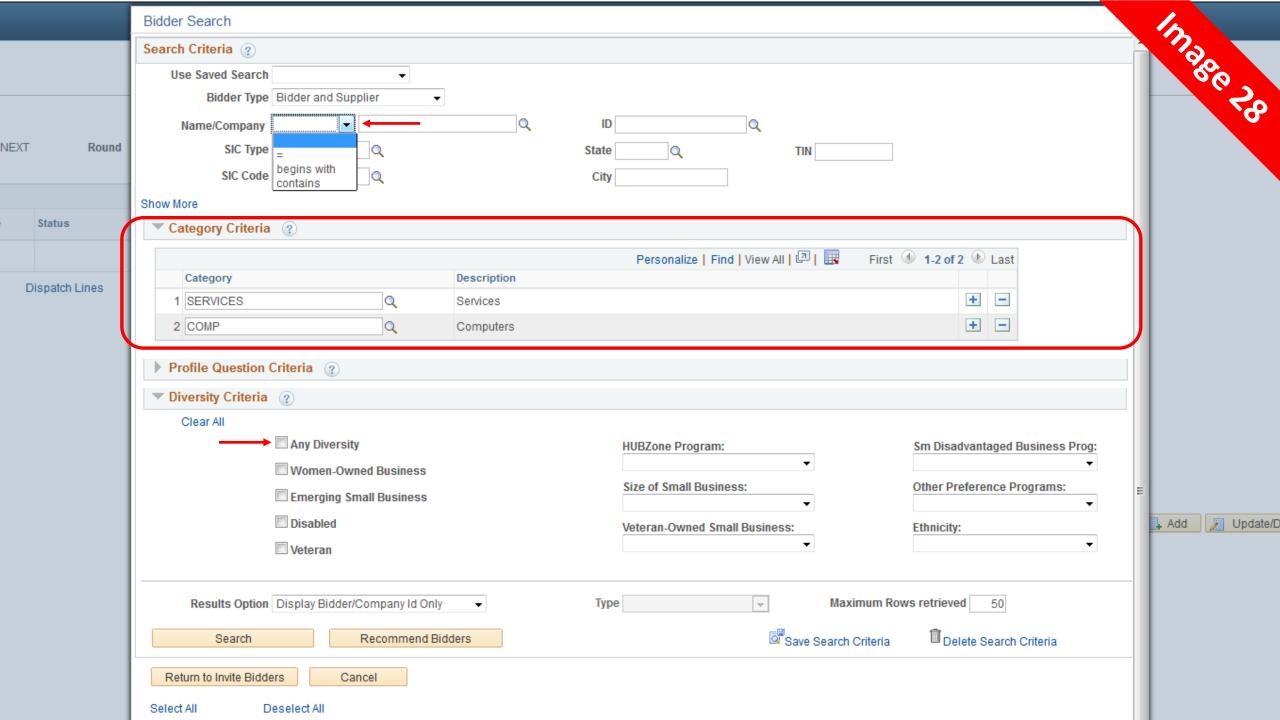
Efficiently Search and Invite Most Appropriate Bidders
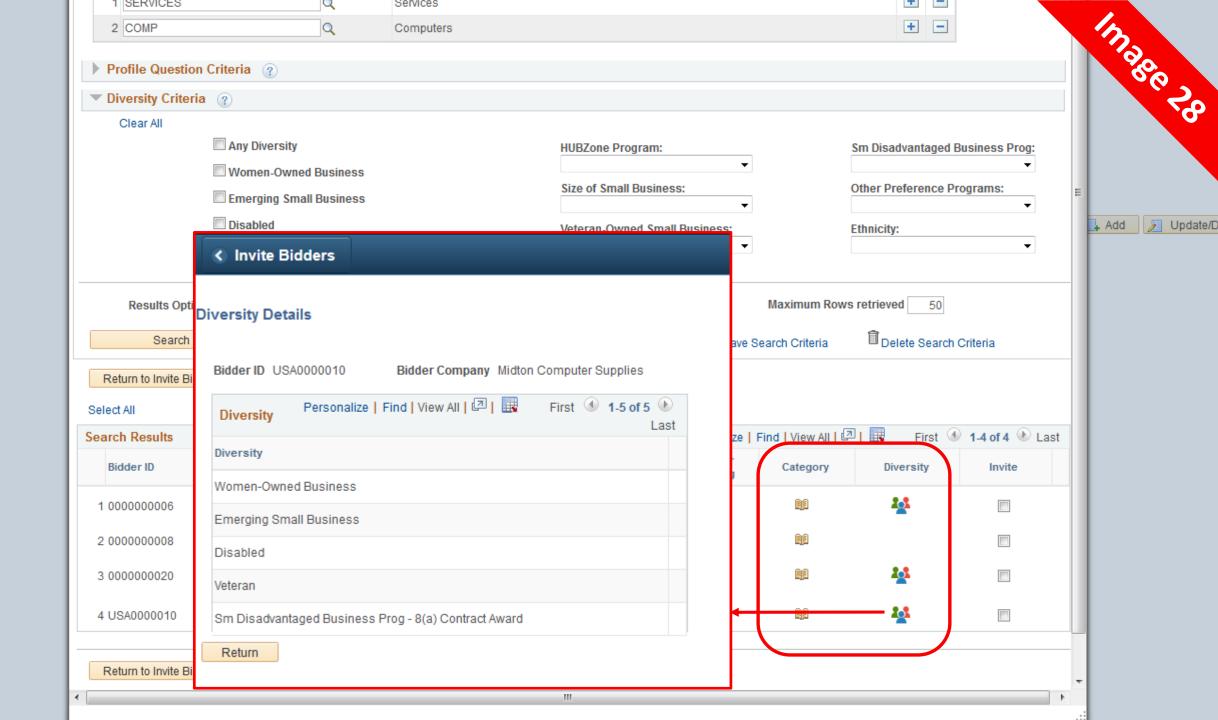
Bidder invitation enhancements

- Combined search to include both Bidder's and Supplier's

- Common search fields are prominently displayed

- Search based upon configurable profile questions

- Improved SIC search

- Select multiple Bidders/Suppliers during a single search

- Option to search Suppliers NOT Open for ordering

| 1 | SERVICES | | Services | | |
| 2 | COMP | | Computers | | |

▶ Profile Question Criteria ⑦

▼ Diversity Criteria ⑦

Clear All

☐ Any Diversity

☐ Women-Owned Business

☐ Emerging Small Business

☐ Disabled

HUBZone Program:

Size of Small Business:

Veteran-Owned Small Business:

Sm Disadvantaged Business Prog:

Other Preference Programs:

Ethnicity:

Add Update/D

◀ Invite Bidders

Diversity Details

Results Opti

Search

Return to Invite Bi

Select All

Search Results

Bidder ID

1 0000000006

2 0000000008

3 0000000020

4 USA0000010

Return to Invite Bi

Maximum Rows retrieved 50

ave Search Criteria   🗑 Delete Search Criteria

Bidder ID USA0000010   **Bidder Company** Midton Computer Supplies

Diversity Personalize | Find | View All | 🗗 | 🧮   First ◀ 1-5 of 5 ▶ Last

Diversity
Women-Owned Business
Emerging Small Business
Disabled
Veteran
Sm Disadvantaged Business Prog - 8(a) Contract Award

Return

ze | Find | View All | 🗗 | 🧮   First ◀ 1-4 of 4 ▶ Last

	Category	Diversity	Invite
	📖	👥	☐
	📖		☐
	📖	👥	☐
	📖	👥	☐

Image 28

Personalize Page

Create an Event

Invite Bidders

Business Unit US001   Event ID NEXT   Round 1   Version 1   Event Format Buy   Event Type RFx

▼ Diversity Information ?

Diversity / Non Diversity

Diversity - 42.86%

Non Diversity - 57.14%

Diversity Breakdown

Veteran-Owned Small Business

Women-Owned Business

Veteran

Disabled

Select	Diversity	%▼
☑	Women-Owned Business	33.33
☑	Veteran	33.33
☑	Veteran-Owned Small Business	11.11
☐	Other Preference Programs	0.00
☑	Disabled	22.22

☐ Public Event

Bidder Invitation List ?

Personalize | Find | View All | 🗗 | 📊   First ◄ 1-7 of 7 ► Last

Select	Bidder ID	Bidder Type	Status	Location	Bidder Company	Category	Diversity	*Dispatch Method		
☐	0000000006	Bidder		1	DavisScott	📖	👥	Email	📋	➖
☐	0000000008	Bidder		1	Oxford Computer Inc	📖		Email	📋	➖
☐	0000000020	Bidder		1	666666666	📖	👥	Email	📋	➖
☐	USA0000010	Supplier		HQ	Midton Computer Supplies	📖	👥	Print	📋	➖
☐	ITV0000047	Supplier	Approved	MAIN	Dellio Computer Corporation			Email	📋	➖
☐	ITV0000046	Supplier	Approved	MAIN	Compact Computer Corp			Email	📋	➖
☐	USA0000020	Supplier	Approved	1	Wendy's Enterprise			Email	📋	➖

Search for Bidders   Dispatch Lines   Save Bidders as Group

[Save Event Changes]   GoTo [▼] [Go]

< Return to Event Overview

PeopleSoft Self-Service Supplier Portal Solutions

Purchasing / Payables
- Self-Service Supplier / User Registration
- Initiate Change Requests
- FAQ's / Contact Us
- Events and Announcements

eSupplier Connection
- Access PO's and Acknowledge
- Submit Change Orders
- Submit ASN's / View Receipts
- View Performance metrics

eSettlements
- Create Invoices
- View invoice lifecycle
- Dispute and resolve collection issues
- View real-time analytics

Strategic Sourcing
- Self-Service Bidder Registration
- View public and invited Events
- Accept and respond to Events
- View and post on Event Forums
- Receive Event Notifications

Supplier Contract Management
- Review and redline documents
- Electronically sign documents
- Monitor and update Documents & Agreements

Secure role-based access for your suppliers

Integrated with Procure-to-Pay

License only what you need

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Image 23

Sign In

Welcome to BST Supplier Portal

Welcome to the BST Supplier Portal. Here is where you will find all the information needed to build a great business collaboration. This site will allow unparalleled opportunities to build your business around BST's diverse procurement needs. Clicking ...

User Registration

View Registration Options.

Bidding Opportunities

05 Opportunities

Events Calendar

02 Calendar Events

Announcements
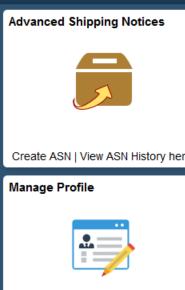
04 Announcements
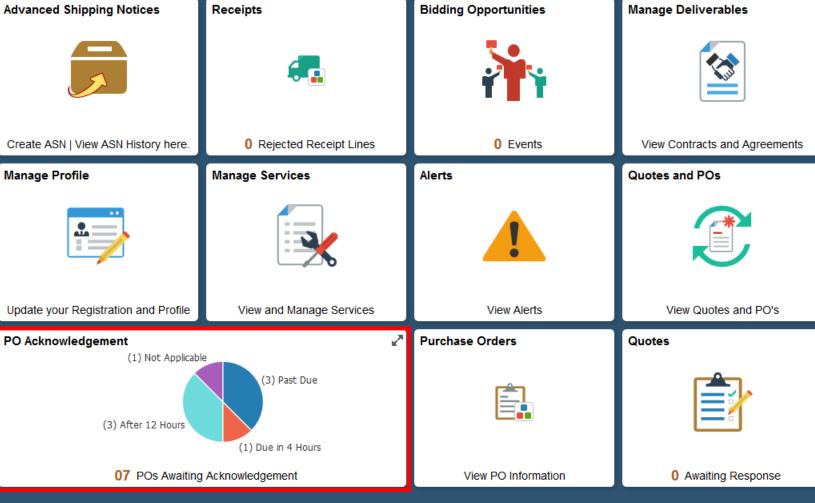
FAQs | Contact Us
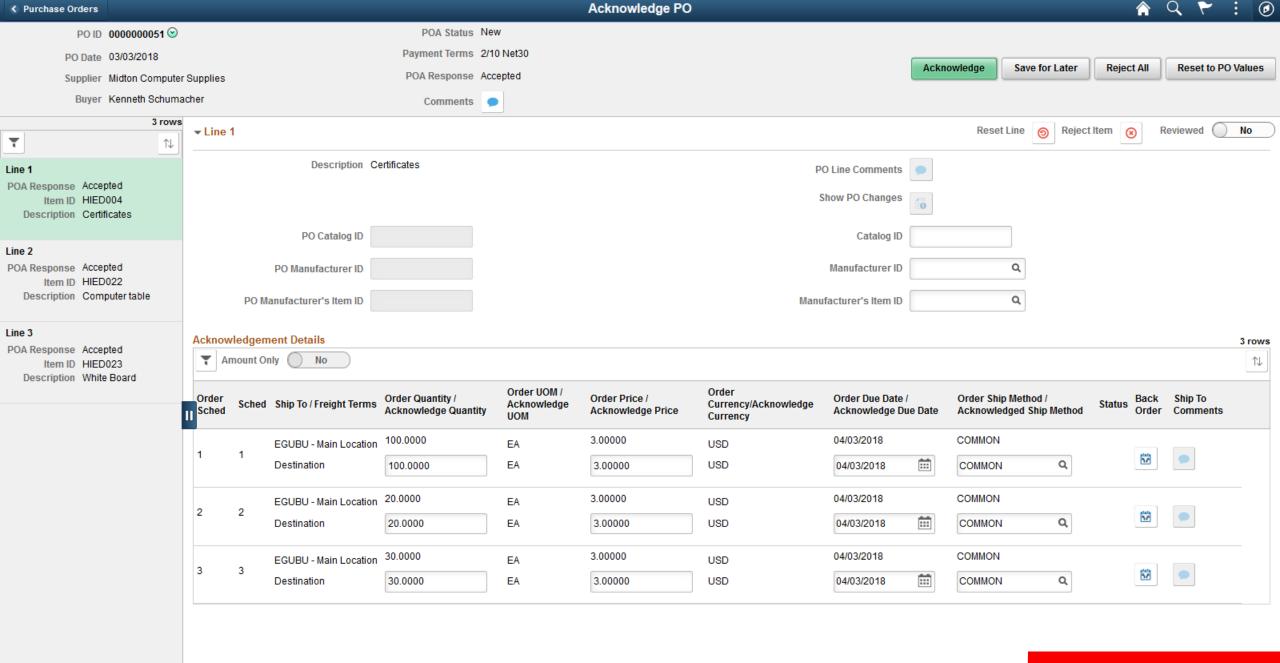
Get helpful information here.

Advanced Shipping Notices

Create ASN | View ASN History here.

Receipts

0 Rejected Receipt Lines

Bidding Opportunities

0 Events

Manage Deliverables

View Contracts and Agreements

Manage Profile

Update your Registration and Profile

Manage Services

View and Manage Services

Alerts

View Alerts

Quotes and POs

View Quotes and PO's

PO Acknowledgement

(1) Not Applicable

(3) Past Due

(3) After 12 Hours

(1) Due in 4 Hours

07 POs Awaiting Acknowledgement

Purchase Orders

View PO Information

Quotes

0 Awaiting Response

PO ID 0000000051 ⊘

PO Date 03/03/2018
Supplier Midton Computer Supplies
Buyer Kenneth Schumacher

POA Status New
Payment Terms 2/10 Net30
POA Response Accepted
Comments 💬

Acknowledge Save for Later Reject All Reset to PO Values

3 rows

▾ Line 1   Reset Line ⊚   Reject Item ⊗   Reviewed ⬤ No

Line 1
POA Response Accepted
Item ID HIED004
Description Certificates

Line 2
POA Response Accepted
Item ID HIED022
Description Computer table

Line 3
POA Response Accepted
Item ID HIED023
Description White Board

Description Certificates

PO Catalog ID [ ]
PO Manufacturer ID [ ]
PO Manufacturer's Item ID [ ]

PO Line Comments 💬
Show PO Changes 🔲

Catalog ID [ ]
Manufacturer ID [🔍]
Manufacturer's Item ID [🔍]

Acknowledgement Details   **3 rows**

Amount Only ⬤ No

Order Sched	Sched	Ship To / Freight Terms	Order Quantity / Acknowledge Quantity	Order UOM / Acknowledge UOM	Order Price / Acknowledge Price	Order Currency/Acknowledge Currency	Order Due Date / Acknowledge Due Date	Order Ship Method / Acknowledged Ship Method	Status	Back Order	Ship To Comments
1	1	EGUBU - Main Location Destination	100.0000 / 100.0000	EA / EA	3.00000 / 3.00000	USD / USD	04/03/2018 / 04/03/2018 📅	COMMON / COMMON 🔍		📅	💬
2	2	EGUBU - Main Location Destination	20.0000 / 20.0000	EA / EA	3.00000 / 3.00000	USD / USD	04/03/2018 / 04/03/2018 📅	COMMON / COMMON 🔍		📅	💬
3	3	EGUBU - Main Location Destination	30.0000 / 30.0000	EA / EA	3.00000 / 3.00000	USD / USD	04/03/2018 / 04/03/2018 📅	COMMON / COMMON 🔍		📅	💬

Image 27

New Tiles

- Notice of Intent to Award (NOIA)
- Awarded Events
- Manage Contract Documents
- Manage Deliverables

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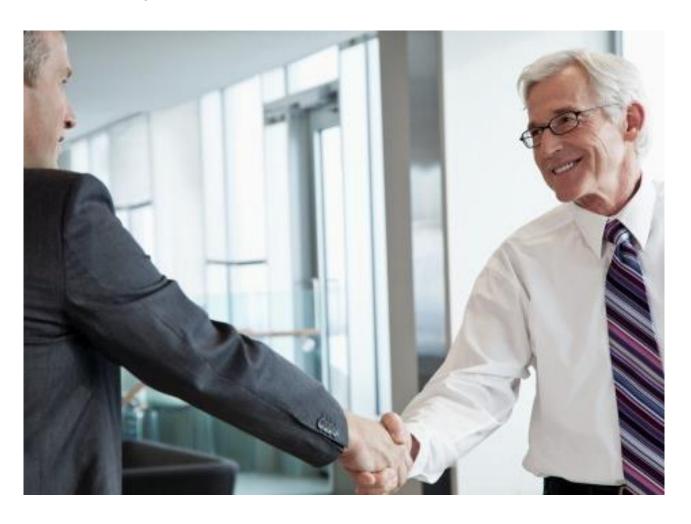
PeopleSoft Procurement Contracts

Establish Guidelines

Establish, Transact and Monitor

- Pricing for Items and/or Categories
- Payment Terms and Conditions
- Timeframe (Begin/End/Renewal)
- Controls (Max Spend and Threshold Alerts)
- Awards from RFQ/Strategic Sourcing

Transact Against

- Requisitions
- Purchase Orders
- Vouchers
- Maintenance Management
- Inventory (Replenishment)

Monitor Activity

- PO Release Summary
- Procurement Spend Analysis
- Payment Analysis

Maximize the Power of PeopleSoft Procurement Contracts and Strategic Sourcing Events

Enhancements to Procurement Contracts

Image 30:

1. Manufacturer and Distributor Contracts
2. Flexible Ship To Pricing
3. Enhanced User Experience
4. UPN on Procure to Pay Transactions
5. Punchout and Ad hoc Item Pricing

PeopleSoft Procurement Contracts

Compliance

- Enforce T&C, Policy and Pricing
- Standardized Process
- Reduces Maverick purchases
- Integrated with ePro, PO and Supplier Contract Management

Visibility

- Contract and Agreements are accessible online
- Track Spend (MFG & DIST)
- Thresholds and Notifications
- Payment Analysis *(Image 32)*

Usability

- Enhances existing business process
- Configurable/Flexible Pricing
- Automatically selects the right contract (ePro and PO)
- Minimal End User Training
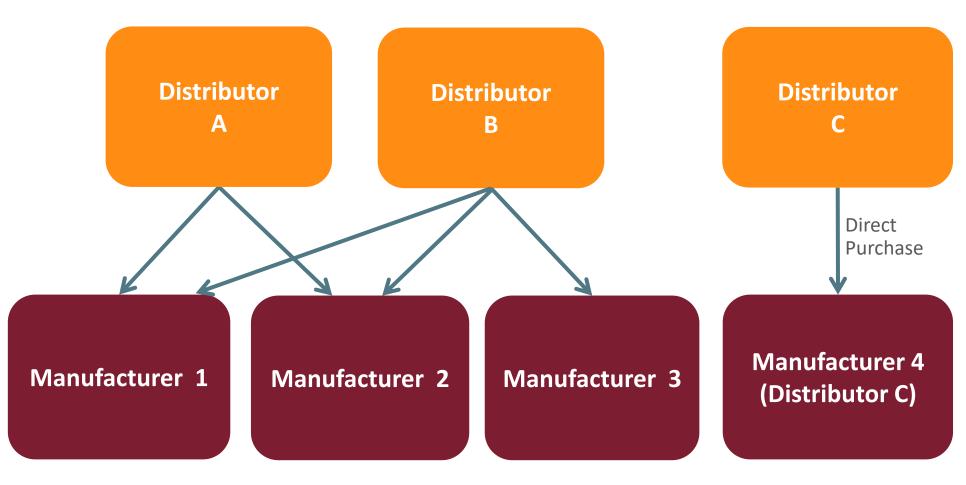
PeopleSoft Procurement Contracts
Manufacturer and Distributor Contracts

Distributor

- Begin/Expire Dates
- Terms & Conditions
- Mark Ups/Downs
- Track Spend
- Notifications

Manufacturer

- Begin/Expire Dates
- Items/Base Prices
- Thresholds
- Track Spend
- Notifications

Distributor A

Distributor B

Distributor C

Direct Purchase

Manufacturer 1

Manufacturer 2

Manufacturer 3

Manufacturer 4 (Distributor C)

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PeopleSoft Procurement Contracts

Enhancements to Procurement Contracts

Image 30:

1. Manufacturer and Distributor Contracts
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PeopleSoft Procurement Contracts
Flexible Ship To Pricing

- Establish Base Price

- Mark Up/Down
  1. Business Unit
  2. Ship To
  3. Contract Domain (Group of Ship To's)

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PeopleSoft Procurement Contracts
Flexible Ship To Pricing

- Establish Base Price

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  2. Ship To
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PeopleSoft Procurement Contracts

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PeopleSoft Procurement Contracts
Enhanced User Experience

Legacy

< Manager Self Service | Add/Update Contracts

Contract Entry
Contract

SetID	SHARE
Contract ID	NEXT
*Status	Approved
Administrator/Buyer	BBELL Brad Bell

Copy From Contract

Contract Version
Version 1 Status Current
Approval Due Date

Add a Document

▼ **Header** ⓘ

*Contract Style	Purchase Order
Process Option	Purchase Order
*Supplier	MACKUSSON-001 Supplier Search
*Supplier ID	0000000055 MacKusson Healthcare
*Begin Date	01/01/2018
Expire Date	12/31/2019
Renewal Date	10/31/2019
Currency	USD CRRNT
Primary Contact	1 Shelley Smithers
Supplier Contract Ref	
Description	Existing PO Contract
Master Contract ID	
Tax Exempt ID	
	☐ Tax Exempt

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

Activity Log
Document Status
Thresholds & Notifications

Amount Summary ⓘ

Maximum Amount	0.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	

▼ **Order Contract Options** ⓘ

☑ Allow Multicurrency PO   ☐ Allow Open Item Reference   ☐ Must Use Contract Rate Date   Rate Date 05/14/2018

☑ Corporate Contract   ☐ Adjust Supplier Pricing First
☐ Lock Chartfields   ☐ Price Can Be Changed on Order   ☑ Auto Default
PO Defaults   Add Open Item Price Adjustments   Price Adjustment Template

▼ **Contract Items**

Image 30

< Employee Self Service | Add/Update Contracts

Contract Entry
Contract

SetID	WCARE
Contract ID	NEXT
*Status	Approved
Administrator/Buyer	BBELL Brad Bell

Copy From Contract

Contract Version
Version 1 Status Current
Approval Due Date

New Version

Add a Document

▼ **Header** ⓘ

*Contract Style	Purchase Order
Process Option	Purchase Order
*Supplier	OFEN&MAJOR-00 Supplier Search
*Supplier ID	HC10000 Ofens and Major
Supplier GLN	
Primary Contact	2 Tom Perkens
Supplier Contract Ref	PO Contract
Description	Contract Usability
Master Contract ID	
*Begin Date	01/01/2018
Expire Date	12/31/2020
Renewal Date	10/31/2020
Control Type	Ship To
	☐ Tax Exempt Tax Exempt ID
	☑ Auto Default
	☐ Lock Chartfields

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

Retention
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
PO Defaults

☑ Corporate Contract

Currency	USD
Rate Date	05/14/2018 CRRNT

☐ Must Use Contract Rate Date
☑ Allow Multicurrency PO

▼ **Contract Control**

▼ **Ship To**

PeopleSoft Procurement Contracts
Enhanced User Experience

‹ Employee Self Service | **Add/Update Contracts**

Contract Entry

Contract

SetID	WCARE	Copy From Contract
Contract ID	WC18-000038747	
*Status	Approved	

Administrator/Buyer   BBELL   Brad Bell

▼ Header ⓘ

*Contract Style	RGB-PO
Process Option	Purchase Order
*Supplier	HULSEMEDIC-001 Supplier Search
*Supplier ID	0000000008 Hulse Medical, Inc
Supplier GLN	
Primary Contact	1 David Hulse
Supplier Contract Ref	Contract Usability
Description	Example - All Features
Master Contract ID	
*Begin Date	01/01/2018
Expire Date	12/31/2020
Renewal Date	10/31/2020
Control Type	Business Unit

☐ Tax Exempt   Tax Exempt ID _____
☑ Auto Default
☐ Lock Chartfields

Contract Version

Version	1
Approval Due Date	
Status	Current

New Version

Add a Document

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

Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
PO Defaults

☑ Corporate Contract

Currency	USD
Rate Date	05/14/2018 CRRNT

☐ Must Use Contract Rate Date
☑ Allow Multicurrency PO

Contract Style

Style ID	RGB-PO
*Structure	Purchase Order
*Contract Style	RGB-PO
*Style Description	Purchase Order
Process Option	Purchase Order
*Style Status	Active

Document Types
☑ Allow All Document Types

Usage Control

General
☑ Agreements   ☑ Manual Create PO Release
☑ Price Adjustments   ☑ Advanced Price Adjustment

Contract Header
☑ Thresholds
                                ☑ Tax Information
☑ Lock Chartfields   ☑ MultiCurrency PO
☑ Open Item Reference   ☑ PO Defaults

Contract Line
☑ Contract Lines   ☑ Contract Base Price Default
☐ Line Groupings   ☑ Line Minimum/Maximum Quantity
☑ Milestones   ☑ Line Minimum/Maximum Amounts

Contract Category
☑ Contracts by Category   ☑ Category Minimum/Maximum Amts

Save | Return to Search | Previous in List | Next in List | Notify | Add

Image 30

PeopleSoft Procurement Contracts
Enhanced User Experience

PeopleSoft Procurement Contracts

Enhancements to Procurement Contracts

Image 30:
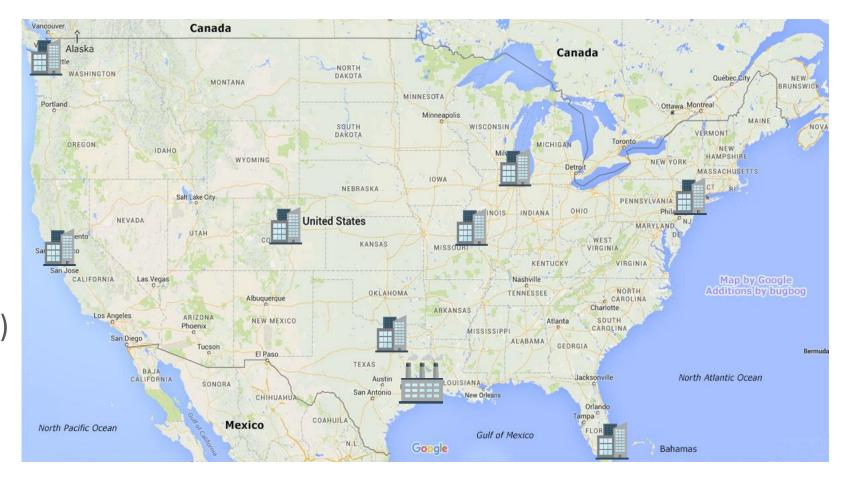
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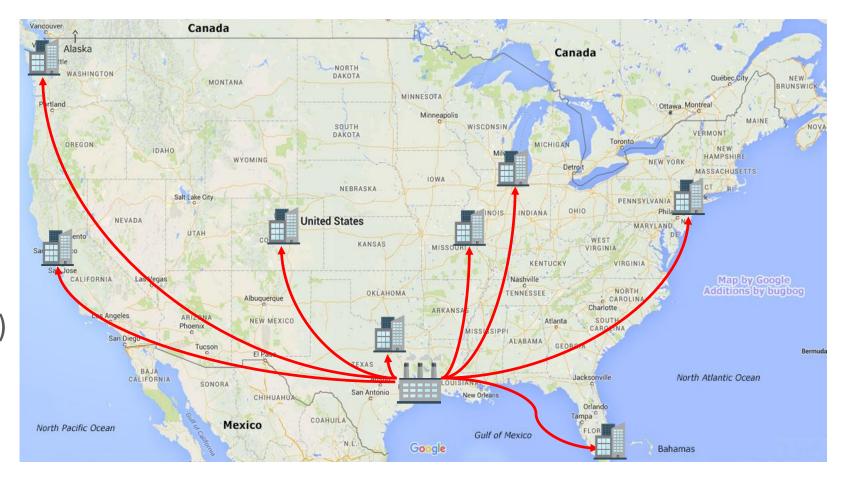
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PeopleSoft Procurement Contracts
UPN on Procure to Pay Transactions

Lines

1-5 of 5 | View All

Details | **Item Information** | **Default Schedule** | **Release Amounts** | **Release Quantities** | **Spend Threshold**

Line		Item	Description	Physical Nature	Manufacturer ID	Manufacturer's Item ID	UPN Type	UPN ID
1		8DA006	2-Piece Flame Resistant Rain Suit, Jacket/Bib Overall, 2XL	Goods	ONGUARD	8DA006	GTIN	72115200
2		8DA007	2-Piece Flame Resistant Rain Suit with Jacket/Bib Overall	Goods	ONGUARD	8DA007	GTIN	78085833
3		33VN60	Rain Bib Overall, ANSI Class: Unrated, XL	Goods	ONGUARD	33VN60	GTIN	76051100
4		33VN61	Rain Bib Overall, ANSI Class: Unrated, L	Goods	ONGUARD	33VN61	GTIN	76050100
5		33VN62	Rain Bib Overall, ANSI Class: Unrated, 2XL	Goods	ONGUARD	33VN62	GTIN	76050200

PeopleSoft Procurement Contracts

Enhancements to Procurement Contracts

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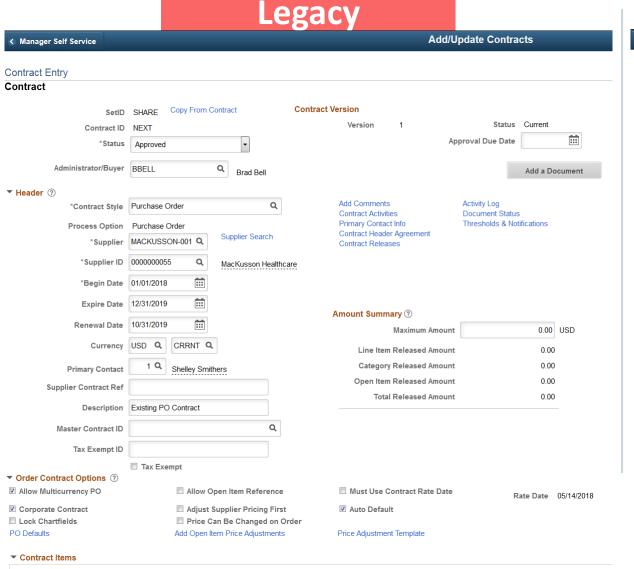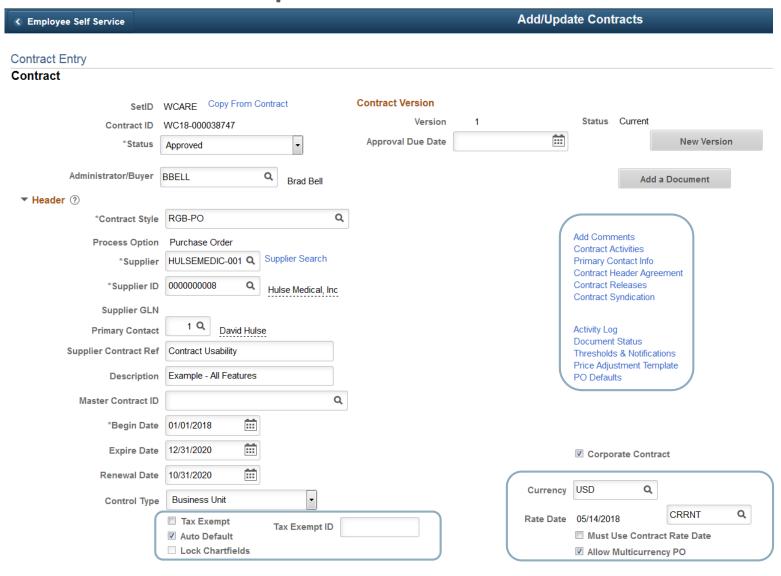5. Punchout and Ad hoc Item Pricing

PeopleSoft Procurement Contracts
Punchout and Ad hoc Item Pricing

Are you being charged the correct price for your Punchout Items?

Punchout

PO Contract

- Always Use Punchout Price
- Always Use Contract Price
- Use Punchout Price if Lower

Discrepancy Report

- Stores Item/Price differences
- Audit History
- Used to renegotiate pricing

ORACLE

Report ID: PVX5000
User ID: VP1
Run Control: MARK

PeopleSoft eProcurement

Punchout and Contract Price Discrepancy Report

Page: 1
Run Date: 10/19/2018
Run Time: 13:00:16 PM

Report Parameters	
Business Unit	US001
To Business Unit	US001
From Date	2018-10-10
Through Date	2018-10-11
Contract SetID	SHARE
Contract ID	
To Contract ID	
Price Discrepancy Option	All
Supplier SetID	SHARE
Supplier ID	

Supplier: Bike Shopper

BU	Req ID	Date	Line	Description	Category	Mfg ID	Mfg Item ID	Supplier Item ID	Transaction Price	Punchout Price
US001/	0000000868	2018-10-10	2	Tripp Lite High Speed HDMI Cable Digital Video w Audio UHD 4K x 2K M M 6	All Items		P568-006	755135	$9.90 USD	$9.89 USD

				Contract SetID	Contract ID	Version	Contract Line	Contract Price	Discrepancy Amount	Discrepancy Percent
				SHARE	POC0402	1	1	$9.90 USD	($0.01) USD	-0.10%

BU	Req ID	Date	Line	Description	Category	Mfg ID	Mfg Item ID	Supplier Item ID	Transaction Price	Punchout Price
US001/	0000000869	2018-10-10	2	Tripp Lite High Speed HDMI Cable Digital Video w Audio UHD 4K x 2K M M 6	All Items		P568-006	755135	$9.90 USD	$9.89 USD

				Contract SetID	Contract ID	Version	Contract Line	Contract Price	Discrepancy Amount	Discrepancy Percent
				SHARE	POC0402	1	1	$9.90 USD	($0.01) USD	-0.10%

BU	Req ID	Date	Line	Description	Category	Mfg ID	Mfg Item ID	Supplier Item ID	Transaction Price	Punchout Price
US001/	0000000870	2018-10-10	2	Tripp Lite High Speed HDMI Cable Digital Video w	All Items		P568-006	755135	$9.90 USD	$9.89 USD

Demo
Enhancements to Procurement Contracts
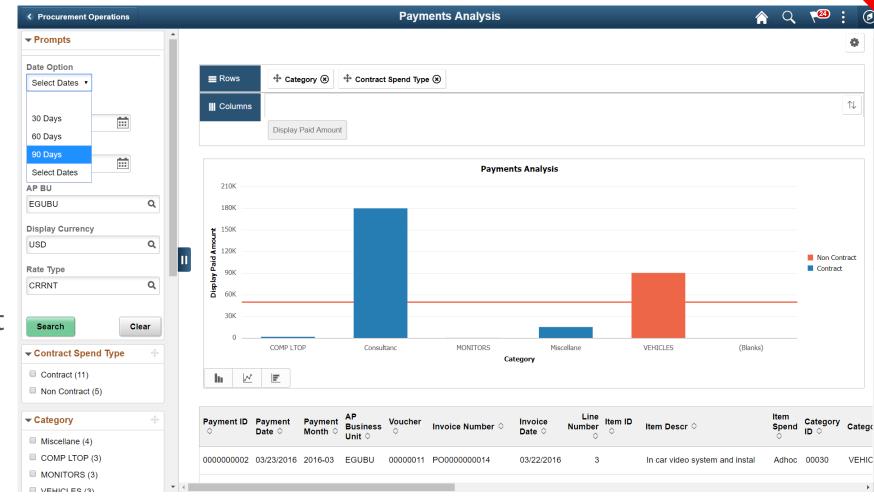
PeopleSoft Procurement Spend
Payment Analysis

Key Benefits

- Real Time
- Analyze Payments vs Procurement Activity
- Data resides in PS

Key Features

- Contract vs Non-Contract
- PO vs Non-PO
- Several other facets
- Security Controlled
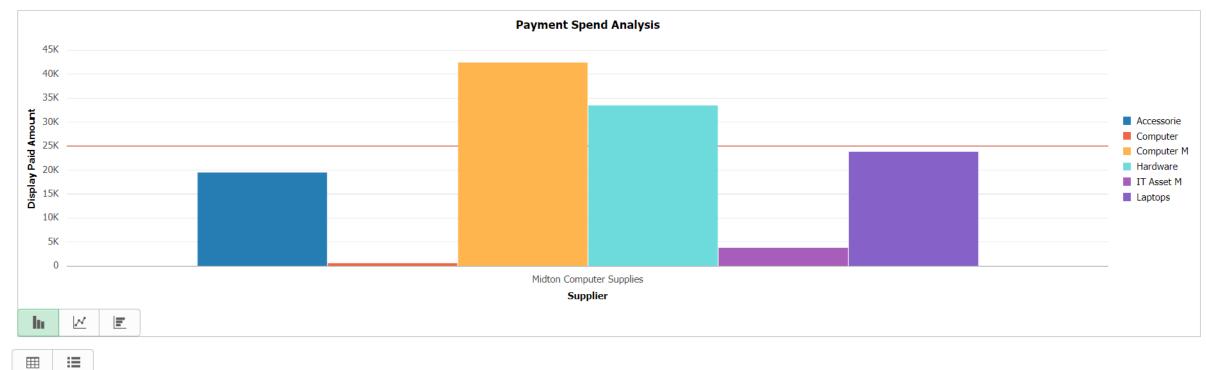
PeopleSoft Procurement Spend
Payment Analysis

PeopleSoft – Supplier Lifecycle Management
Continuous Investment – Non Exhaustive

Strategic Sourcing:

- Fluid Response to Bid Opportunities
- Fluid Event Analysis
- Event Reminder Notifications

Supplier Contract Management:

- Document Management Permissions
- Embed Attachments into documents for digital signatures (Adobe Sign)

Purchasing:

- Supplier Classification and Certificate Management
- Sync functionality between Supplier Registration and Change Requests
- Tag Assets during Inspection or after PO Receipt
- PCard Maintenance and Processing
- PO Dispatch – Visibility to undelivered Emails
- Ability to automatically load and update Procurement Contracts
- Multiple Supplier Scorecarding Enhancements

PeopleSoft's Return-To-Vendor Process:
It's Not As Scary As You Think!

Upcoming Session – 102130

PeopleSoft RTV Process

Thursday, July 18
1:45 PM – 2:45 PM
DaVinci AB

PeopleSoft's ERP Product Team Panel Discussion

Upcoming Session – 102170

PeopleSoft ERP Panel Discussion

Thursday, July 18
3:00 PM – 4:00 PM
International Ballroom E
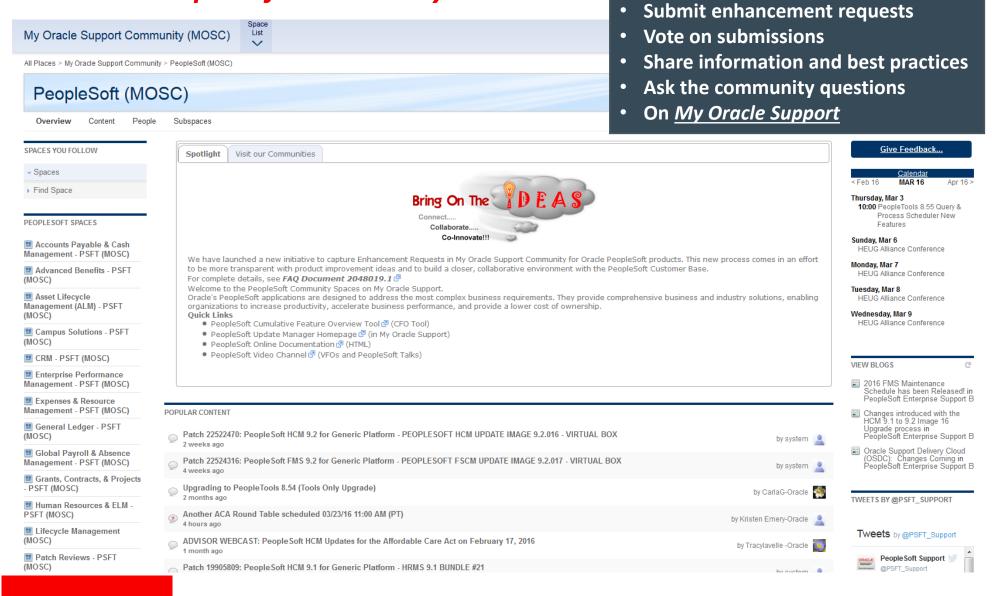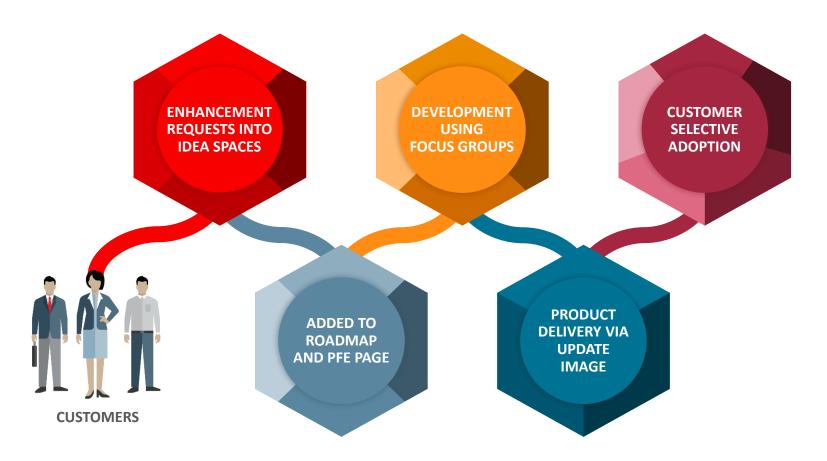
Get Connected and Stay Informed

Be Heard! PeopleSoft Community Ideas

- **Submit enhancement requests**
- **Vote on submissions**
- **Share information and best practices**
- **Ask the community questions**
- **On *My Oracle Support***

Your Input Drives Us
Customer Driven, Rapid Innovation Cycles

ENHANCEMENT REQUESTS INTO IDEA SPACES

DEVELOPMENT USING FOCUS GROUPS

CUSTOMER SELECTIVE ADOPTION

ADDED TO ROADMAP AND PFE PAGE

PRODUCT DELIVERY VIA UPDATE IMAGE

CUSTOMERS

- Direct input from customers.
- Agile, iterative development cycles.
- Frequent product deliverables.
- Flexible, lower cost consumption.
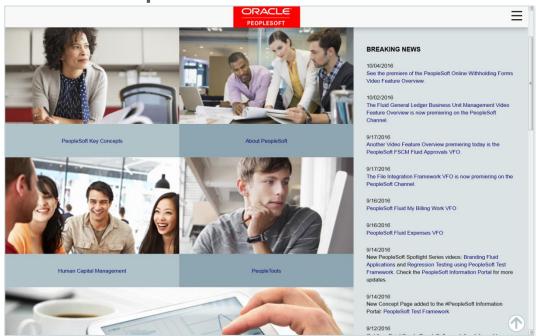
Idea to Impact in Months Not Years

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Get Connected and Stay Informed

Key PeopleSoft Information Sources

PeopleSoft Information Portal

PeopleSoft YouTube Channel

Social Media

@PeopleSoft_Info

Oracle PeopleSoft Page

Oracle PeopleSoft Development Group

Blogs

Questions and Answers

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Auto Numbering

SetID   WCARE   Wondercare

Number Type   MFGC   Manufacturer Contract

*Field Name   CNTRCT_ID 🔍   Length   25

Automatic Numbering Details

🔲 🔍 |◄ ◄   1-1 of 1 ▼   ► ►| | View All

*Start Seq	*Max Length	*Description	Last Number Issued	Default?		
WMF	10	Manufacturer Contract	8	☑	+	−

[Save]   [Return to Search]   [Previous in List]   [Next in List]   [Notify]   [Add]   [Update/Display]

User Preferences | **Procurement**

User   BMURKAMI   Brad Murkami
Location   [WCGEN 🔍]   WonderCare General Hospital
Origin   [ONL 🔍]   Online Entry *
Department   [21200 🔍]   4 West
Ship To Location   [WCGEN 🔍]   WonderCare General Hospital
Requester   [BMURKAMI 🔍]   Bill Murkami
Buyer   [BMURKAMI 🔍]   Bill Murkami

Contract Process   Payables Online Vouchering   Purchase Order Authorizations
Rebate Authorizations   Receiver / RTV Setup   Supplier Processing Authority
Request for Quote Process   Requisition Authorizations   Doc Tolerance Authorizations

[**Save**]   [**Return to Search**]   [**Notify**]   [**Refresh**]

User Preferences | Procurement

Contract Process   ✕

                                                              Help

User   BMURKAMI   Brad Murkami

Contract Process

Contract Status   [Open ▾]
☑ Approve Contracts   ☑ Allow PO Contract Releases
☑ Enter Contracts/New Version   ☑ Allow AP Contract Releases
☑ Hold Contracts
☑ Close Contracts
☑ Cancel Contract

Default Display

*Process Option   [MFG 🔍]   Manufacturer
Contract Style   [MFG 🔍]   Manufacturer

*Header Information   [Open ▾]
Contract Control   [Open ▾]
*Voucher Options   [Collapsed ▾]
Amount Summary   [Open ▾]
*Order Options   [Collapsed ▾]
*Item Lines   [Open ▾]
*Category Lines   [Open ▾]
*PO Information   [Open ▾]

[**OK**]   [**Cancel**]   [**Refresh**]

Contract Entry

Contract

SetID WCARE Copy From Contract

Contract ID NEXT

*Status Open ▼

Administrator/Buyer [ ] 🔍

▼ Header ⑦

*Contract Style General Contract 🔍 ⬅

Process Option General Contract

*Supplier [ ] 🔍 Supplier Search

*Supplier ID [ ] 🔍

Supplier GLN

Primary Contact [ ] 🔍

Supplier Contract Ref [ ]

Description [ ]

Master Contract ID [ ] 🔍

*Begin Date 07/12/2019 📅

Expire Date [ ] 📅

Renewal Date [ ] 📅

Control Type [ ] ▼

Punchout Pricing Option Always Use Contract Price ▼

☐ Tax Exempt Tax Exempt ID [ ]
☑ Auto Default
☐ Lock Chartfields

Contract Version

Version 1 Status Current

Approval Due Date [ ] 📅 New Version

Add a Document

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

Retention
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
Purchase Order BU Defaults

☑ Corporate Contract

Currency USD 🔍

Rate Date 07/12/2019 CRRNT 🔍

☐ Must Use Contract Rate Date
☑ Allow Multicurrency PO

Contract Style

Style ID GN

*Structure General Contract ▼

*Contract Style General Contract

*Style Description General Contract

Process Option General Contract

*Style Status Active ▼

Document Types
☑ Allow All Document Types

Usage Control

General
☑ Agreements ☑ Manual Create PO Release
☑ Price Adjustments ☑ Advanced Price Adjustment

Contract Header
☑ Thresholds
☑ Retention ☑ Tax Information
☑ Lock Chartfields ☑ MultiCurrency PO
☑ Open Item Reference ☑ PO Defaults

Contract Line
☑ Contract Lines ☑ Line Minimum/Maximum Quantity
☑ Line Groupings ☑ Line Minimum/Maximum Amounts
☑ Milestones

Contract Category
☑ Contracts by Category ☑ Category Minimum/Maximum Amts

< **Employee Self Service**

Manufacturers

SetID WCARE   Manufacturer ID BESTON SCIENTIFIC

*Description Beston Scientific

Short Description Beston Sci

GLN 0078902880122

Default Universal Item ID GTIN 🔍   Global Trade Item Number

☐ Locally Owned

☑ Direct Purchase ⟵———————— Example of a Manufacturer as a Direct Purchase

Supplier BESTONSCIE-001

Supplier ID HC10033   Beston Scientific

| Save | Return to Search | Previous in List | Next in List | Notify | | Add | Update/Display |

Contract and Vendor Rebate Controls

SetID   WCARE   Wondercare

Contract

☑ **Use Version Control**
☑ **Display GLN on Contracts**

☑ **Allow Link to Multiple Groups**

☑ **Track Changes**

☐ **Track Changes on Draft**

Change Template   STANDARD   🔍

Templates

🔍			1-2 of 2 ▾			View 1

	*Contract Process Option	*Change Template		
1	DST 🔍	STANDARD 🔍	➕	➖
2	MFG 🔍	STANDARD 🔍	➕	➖

Reason Type   Procurement Contract
Default Reason Code   🔍

☐ **Reason Code Required**
☐ **Comments Required**

Line Matching

☑ **Punchout Items**
☑ **Other Description-Only Items**

Default Currency

*Currency Code   USD   🔍

*Rate Type   CRRNT   🔍

Default Reporting Supplier

Supplier ID   HCMULTIPLE   🔍   Supplier Contract Group Contract Supplie

Default Currency

*Currency Code USD

*Rate Type CRRNT

Default Reporting Supplier

Supplier ID HCMULTIPLE   Supplier Contract Group Contract Supplie

Contract Usage

Options

Control Type	Access	Markup	
Business Unit	☑	☑	
Contract Domain	☑	☑	
Ship To	☑	☑	

Auto Numbering

☑ Use Autonumbering

☑ Master Contracts

☑ Group Contracts

☑ Special Purpose Contracts

☑ Manufacturer Contracts

☑ Distributor Contracts

Last Contract ID   0000000106

Last Master Contract ID   0000000001

Last Group Contract ID   GRP0000102

Last Special Purpose Contract ID   SPC0000201

Last Manufacturer Contract ID   WMF0000008

Last Distributor Contract ID   WDS0000007

Vendor Rebates

Last Rebate ID   1   (Default Sequence)

Last Claim ID   8   (Default Sequence)

Amount Tolerance Over   10000.00   Percentage Tolerance Over   10.00

Amount Tolerance Under   10000.00   Percentage Tolerance Under   10.00

Contract Entry

Contract

SetID   WCARE

Contract ID   WMF0000008

*Status   [Open ▾]

Administrator/Buyer   [BMURKAMI 🔍]   Bill Murkami

Contract Version

Version   1

Approved Date   07/12/2019

Status   Current

[New Version]

[Add a Document]

▾ **Header** ⓘ

*Contract Style   [Manufacturer 🔍]

Process Option   Manufacturer

Manufacturer ID   [CLINIPAD 🔍]   Clinipad

Supplier Contract Ref   [WC78987-034]

Description   [Hospital Beds]

*Begin Date   [07/01/2019 📅]

Expire Date   [07/31/2021 📅]

Renewal Date   [06/30/2021 📅]

Control Type   [Ship To ▾]

Punchout Pricing Option   [Always Use Contract Price ▾]

☑ Auto Default

Add Comments
Contract Activities
Contract Header Agreement

Activity Log
Document Status
Thresholds & Notifications
View Changes

Currency   [USD 🔍]

Rate Date   07/12/2019   [CRRNT]

☐ Must Use Contract Rate Date

▾ **Amount Summary** ⓘ

Maximum Amount   [200,000.00]   USD

Released Amount   0.00

Remaining Amount   200,000.00

Remaining Percent   100.00

Distributors

Distributor Contract Information

	Direct Purchase	*Distributor Contract ID				Released Amount	Currency	*Relationship Status	*Priority	Markup % / Markdown %			
	☐	WDS0000007 🔍	🗎	🗎	🗎🔒		USD	Active ▾	1	3.0000		➕	➖
	☐	WDS0000003 🔍	🗎	🗎	🗎🔒		USD	Active ▾	2	5.0000		➕	➖

Contract Items

Catalog Search   Item Search   Search for Contract Lines

Lines

Tabs: Details | Item Information | Default Schedule | Release Amounts | Release Quantities | Spend Threshold

Line		Item	Description		UOM	Category		Status			
1	📑	HC42191807 🔍	Patient care beds for general use		EA	42191800	💬	Active	❌	➕	➖
2	📑	HC42191808 🔍	Patient care beds for specialty care		EA	42191800	💬	Active	❌	➕	➖

View Category Hierarchy   Category Search

Buttons: Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display | Correct His

Lines

Line		Item	Description	Physical Nature	Manufacturer ID	Manufacturer's Item ID	UPN Type	UPN ID		
1		HC42191807 🔍	Patient care beds for general use	Goods ▾	CLINIPAD	TM42340 🔍	GTIN 🔍	789445441263 🔍	+..	−
2		HC42191808 🔍	Patient care beds for specialty care	Goods ▾	CLINIPAD	TM78639 🔍	GTIN 🔍	789445444782 🔍	+..	−

Tabs: Details | **Item Information** | Default Schedule | Release Amounts | Release Quantities | Spend Threshold | ‖▸
1-2 of 2 ▾ | View All

Lines

Line		Item	Description	Std UOM	UOM	Use Contract Base Price	Base Price	Currency		
1		HC42191807 🔍	Patient care beds for general use	EA	EA 🔍	☐	4545.00	USD 🔍	+..	−
2		HC42191808 🔍	Patient care beds for specialty care	EA	EA 🔍	☐	7500.00	USD 🔍	+..	−

Tabs: Details | Item Information | **Default Schedule** | Release Amounts | Release Quantities | Spend Threshold | ‖▸
1-2 of 2 ▾ | View All

Lines

Line		Item	Description	Minimum Line Amount	Maximum Line Amount	Total Line Released Amount	Remaining Amount	Curr	Remaining Amount %		
1		HC42191807 🔍	Patient care beds for general use		110,000.00		$110,000.00	USD	100.00	+..	−
2		HC42191808 🔍	Patient care beds for specialty care		90,000.00		$90,000.00	USD	100.00	+..	−

Tabs: Details | Item Information | Default Schedule | **Release Amounts** | Release Quantities | Spend Threshold | ‖▸
1-2 of 2 ▾ | View

View Category Hierarchy   Category Search

Lines

							1-2 of 2 ▾		View All	

| Details | Item Information | Default Schedule | Release Amounts | **Release Quantities** | Spend Threshold | ‖▸ | | | | | |

Line		Item	Description	Minimum Line Quantity	Maximum Line Quantity	Total Line Qty Released	Remaining Quantity	UOM	Remaining Quantity %		
1	▤	HC42191807 🔍	Patient care beds for general use ↗	1.00	24.00		24.0000	EA	100.00	+…	—
2	▤	HC42191808 🔍	Patient care beds for specialty care ↗	1.00	12.00		12.0000	EA	100.00	+…	—

View Category Hierarchy   Category Search

Lines

							1-2 of 2 ▾		View All	

| Details | Item Information | Default Schedule | Release Amounts | Release Quantities | **Spend Threshold** | ‖▸ | | | | |

Line		Item	Description	Notify on Spend Threshold	Threshold Notification Amount	Total Line Released Amount		
1	▤	HC42191807 🔍	Patient care beds for general use ↗	☑	5,000.00	0.00	+…	—
2	▤	HC42191808 🔍	Patient care beds for specialty care ↗	☑	7,500.00	0.00	+…	—

View Category Hierarchy   Category Search

Contract

SetID   WCARE

Contract ID   WDS0000007

*Status   [Open ▼]

Administrator/Buyer   [BMURKAMI 🔍]   Bill Murkami

[Add a Document]

▼ Header ⑦

*Contract Style   [Distributor 🔍]

Process Option   Distributor

*Supplier   [MEDICAL EQ-001 🔍]   Supplier Search

*Supplier ID   [HC10023 🔍]   Medical Equipment Rental Company

Supplier GLN

Primary Contact   [🔍]

Supplier Contract Ref   [WC9729-0701]

Description   [Medical Equipment / Furniture]

Master Contract ID   [🔍]

*Begin Date   [07/01/2019 📅]

Expire Date   [07/31/2021 📅]

Renewal Date   [06/01/2021 📅]

Markup Percentage   [3.0000]

Add Comments
Contract Activities
Primary Contact Info
Contract Header Agreement

Activity Log
Date Notifications

☑ Corporate Contract

Currency   [USD 🔍]

Rate Date   07/12/2019   [CRRNT 🔍]

▼ **Contract Control**

▼ **Business Unit**

| ⊞ 🔍 | | ⏮ ◀ 1-1 of 1 ▼ ▶ ⏭ ∣ View All |

	*Business Unit	Description	Markup % / Markdown %		
1	[WCGEN 🔍]	Wondercare General	3.0000	➕	➖

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Business Unit

	*Business Unit	Description	Markup % / Markdown %		
1	WCGEN	Wondercare General	3.0000	+	−

1-1 of 1 | View All

Contract Domain

	*Contract Domain SetID	*Contract Domain	Description	Markup % / Markdown %		
1	WCARE	GEN-HOSP	General Hospitals	5.0000	+	−
2	WCARE	WONDERCARE	Wondercare Hospitals	5.0000	+	−

1-2 of 2 | View All

Ship To

	*ShipTo SetID	*Ship To	Description	Markup % / Markdown %		
1	WCARE	GEN-WHSE	General Hospital - Warehouse	3.0000	+	−
2	WCARE	H1000	General Hospital	5.0000	+	−
3	WCARE	WCCHI	Wondercare Childrens Hospital	5.0000	+	−
4	WCARE	WCGEN	WonderCare General Hospital	5.0000	+	−
5	WCARE	WCWHS	Wondercare Warehouse	3.0000	+	−

1-5 of 5 | View All

▼ Manufacturers

Total Released Amount   0.00   USD

Contract Information

| | | 1-1 of 1 ▾ | | View All |

| Summary Information | Details | ‖▶ |

	Manufacturer Contract ID			Manufacturer	Manufacturer ID	Relationship Status	Markup % / Markdown %	
1	WMF0000008	📄	📄	Clinipad	CLINIPAD	Active	3.0000	(%)

| Save | Return to Search | Previous in List | Next in List | Notify | Refresh | | Add | Update/Display | Correct History |

ORACLE®

Define Item

General | Inventory | Substitutes | Configuration | Custom | Audit

Common   Classifications   Classification 2   Dimensions   Usage

SetID   WCARE   Item ID   HC42191807

*Description   Patient care beds for general use

Item Type
- ☑ Inventory Item
- ☐ Non-Owned Item
- ☐ Consigned Purchase

Item Status

Current Status Date   10/19/2015   *Current Status   Active ▼

Future Status Date   [ ] 📅   Future Status   [▼]   Copy Item Status

*Standard UOM   EA   Each   Default Category   42191800   🔍   Categories

*Physical Nature   Goods ▼

Item Group   MED/SURG   🔍   Med/Surg

Family   MISC   🔍   Misc

Demand Priority   [ ] 🔍

Cost Profile Group   [ ] 🔍

Promise Option   [▼]

Item Image   Manufacturers   Purchasing Item Attributes

Purchase Items Attributes

Purchasing Attributes | Purchasing Controls | Item Supplier

SetID   WCARE   Item ID   HC42191807

Description   Patient care beds for general use

PO Available Date   12/17/2015   📅

Unavailable   [ ] 📅

☐ Use as Substitute Item Only

Standard Price   5000.00000   EA

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Item Standard Price = $5,000

WCGEN = 5% Markup or $5,250
WCWHS = 3% Markup or $5,150

Add/Update Express POs

Express Purchase Order

Purchase Order

Business Unit WCGEN

PO ID NEXT

Copy From [▼]

▼ Header ⓘ

*PO Date 07/12/2019 📅   Supplier Search

*Supplier MEDICAL EQ-001 🔍   Supplier Details

*Supplier ID HC10023 🔍   Medical Equipment Rental Com

*Buyer BMURKAMI 🔍   Bill Murkami

PO Reference Reconnect Demo

Header Details   Activity Summary
PO Defaults   Add Comments
PO Activities   Add ShipTo Comments
▼ Actions

Add Items From ⓘ

Catalog   Item Search
Purchasing Kit

Lines ⓘ

Line	Item	Description
▼ 1	📋 HC42191807 🔍	Patient care beds for general use 📋
	📑	
	220 characters remaining	

Schedules

Sched		*Due Date		*Ship To		*PO Qty	Pr
▶ 1	📋	07/12/2019 📅	WCGEN 🔍			3.0000	5,250.00
▶ 2	📋	07/12/2019 📅	WCWHS 🔍			2.0000	5,150.00

Expand All   Collapse All

View Printable Version

💾 Save   ✉ Notify   🔄 Refresh

Details for Line 1

Help

PO ID NEXT   **Supplier** MEDICAL EQ-001

Line 1   **Item ID** HC42191807   Patient care beds for general

Line Details

Category 42191800   **Line Status** Approved △

Description Patient beds and accessories   **Backorder Status** Not Backordered

Category ID 00010

Amount Summary

Amount to Receive   USD   **Merchandise Amount** 26,050.00   USD

Quantity to Receive   **Doc. Base Amt** 26,050.00   USD

Item Availability

Transaction Item Description

Patient care beds for general use ✍

220 characters remaining

Preferred Language Item Description

Patient care beds for general use

Expand All   Collapse All

▶ **Item Information**

▶ **Attributes**

▶ **RFQ**

▼ **Contract**

Contract SetID WCARE

Contract ID WMF0000008 🔍

Contract Version 1 📑

Contract Line 1 🔍

Category Line Number 🔍

Group ID

Contract Details

Milestone Line

Release NEXT

Rebate ID 🔍

▶ **Receiving**

62

Contract ID   WMF0000008   Version   1   Status   Current

*Status   [Approved   ▾]   Approved Date   07/12/2019   [**New Version**]

Administrator/Buyer   BMURKAMI   Bill Murkami   [**Add a Document**]

▼ **Header** ⑦

Contract Style	Manufacturer
Process Option	Manufacturer
Manufacturer ID	CLINIPAD Clinipad
Supplier Contract Ref	WC78987-034
Description	Hospital Beds
Begin Date	07/01/2019
Expire Date	07/31/2021
Renewal Date	06/30/2021
Control Type	Ship To
Punchout Pricing Option	Always Use Contract Price
	☑ Auto Default

Add Comments
Contract Activities
Contract Header Agreement

Activity Log
Document Status
Thresholds & Notifications
View Changes

Currency   USD

Rate Date   07/12/2019   CRRNT
☐ Must Use Contract Rate Date

▼ **Amount Summary** ⑦

Maximum Amount	200,000.00	USD
Released Amount	26,050.00	
Remaining Amount	173,950.00	
Remaining Percent	86.98	

▼ **Distributors**

Distributor Contract Information

🔍 |◀ ◀ [1-2 of 2 ▾] ▶ ▶| | View All

| Summary Information | Details | ||▶ |

Direct Purchase	Distributor Contract ID				Released Amount	Currency	Relationship Status	Priority	Markup % / Markdown %	
☐	WDS0000007	📄	📄	📄	26,050.00	USD	Active	1	3.0000	👤↗

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Distributors

Distributor Contract Information

| | Summary Information | Details | ‖▶ |

Direct Purchase	Distributor Contract ID				Released Amount	Currency	Relationship Status	Priority	Markup % / Markdown %	
☐	WDS0000007				26,050.00	USD	Active	1	3.0000	
☐	WDS0000003					USD	Active	2	5.0000	

Contract Items

Catalog Search   Item Search   Search for Contract Lines

Lines

| Details | Item Information | Default Schedule | **Release Amounts** | Release Quantities | Spend Threshold | ‖▶ |

Line		Item	Description	Minimum Line Amount	Maximum Line Amount	Total Line Released Amount	Remaining Amount	Curr	Remaining Amount %	
1		HC42191807	Patient care beds for general use		110,000.00	26,050.00	$83,950.00	USD	76.32	
2		HC42191808	Patient care beds for specialty care		90,000.00		$90,000.00	USD	100.00	

View Category Hierarchy   Category Search

SetID   WCARE

Contract ID   WDS0000007

*Status   [Approved ▾]

Administrator/Buyer   BMURKAMI   Bill Murkami

[Add a Document]

▼ Header ⑦

Contract Style   Distributor

Process Option   Distributor

Supplier   MEDICAL EQ-001   Add Comments
                                                              Contract Activities
Supplier ID   HC10023   Medical Equipment Rental Company   Primary Contact Info

Supplier GLN   Contract Header Agreement

Primary Contact

Supplier Contract Ref   WC9729-0701

Description   Medical Equipment / Furniture   Activity Log
                                                              Date Notifications
Master Contract ID

Begin Date   07/01/2019

Expire Date   07/31/2021

Renewal Date   06/01/2021

Markup Percentage   3.0000   ☑ Corporate Contract

                                             Currency   USD

                                             Rate Date   07/12/2019   CRRNT

▸ Contract Control

▼ Manufacturers

| Total Released Amount | 26050.00 | USD |

Contract Information

1-1 of 1 ▾

	Manufacturer Contract ID			Manufacturer	Manufacturer ID	Markup % / Markdown %	Contract Status	Begin Date	Expire Date	Released Amount	Currency
1	WMF0000008	📄	📄	Clinipad	CLINIPAD	3.0000	Approved	07/01/2019	07/31/2021	26,050.00	USD

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Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

✷ My Preferences   ✿ Requisition Settings

Requisition Summary

Business Unit WCGEN   Wondercare General   Requisition Name 0000000047

Requester BMURKAMI   Bill Murkami   Requisition ID 0000000047

*Currency USD 🔍   Priority Medium ▾

Cart Summary: Total Amount 28,775.00 USD

Expand lines to review shipping and accounting details   ➕ Add More Items

Requisition Lines ⑦

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▾ ☐ 1 📖 Patient care beds for general		HC42191807	Medical Equipment Rental Company	4.0000	Each	Multiple	20900.00 ⇕	📃	💬 Add	🗑

Shipping Line 1   *Ship To WCGEN 🔍   Add Shipto Comments   Quantity 3.0000   ➕ ➖
                Address 4422 S. Wolf Rd
                         Westchester, IL 60154

5% Markup

                                                    Price 5250.0000
                Ship To GLN   Price Adjustment
                Attention To Bill Murkami   Pegging Inquiry
                Due Date [   ] 📅   Pegging Workbench
                                                           Maintenance WO

        ▸ Accounting Lines

Shipping Line 2   *Ship To WCWHS 🔍   Add Shipto Comments   Quantity 1.0000   ➕ ➖
                Address 4223 S. Wolf Rd.
                         Westchester, IL 60154

3% Markup

                                                    Price 5150.0000
                Ship To GLN   Price Adjustment
                Attention To Bill Murkami   Pegging Inquiry
                Due Date [   ] 📅   Pegging Workbench
                                                           Maintenance WO

        ▸ Accounting Lines

| ▾ ☐ 2 📖 Patient care beds for specialt | | HC42191808 | Medical Equipment Rental Company | 1.0000 | Each | 7875.0000 | 7875.00 ⇕ | 📃 | 💬 Add | 🗑 |

Shipping Line 1   *Ship To WCGEN 🔍   Add Shipto Comments   Quantity 1.0000   ➕ ➖
                Address 4422 S. Wolf Rd
                         Westchester, IL 60154
                                                    Price 7875.0000
                Ship To GLN   Price Adjustment
                Attention To Bill Murkami   Pegging Inquiry
                Due Date [   ] 📅   Pegging Workbench
                                                           Maintenance WO

        ▸ Accounting Lines

☐ Select All / Deselect All   Select lines to: 📇 Add to Favorites   📇 Add to Template(s)   🗑 Delete Selected   📋 Mass Change

---

Line Details

Line Details ⑦

🖼 Line 1 📖 Patient care beds for general   Line Status Open

▾ **Item Details** ⑦

Merchandise Amount 21000.00 USD   ☐ RFQ Required
Item ID HC42191807   ☐ Device Tracking
Category 42191800   ☐ Zero Price Indicator
Original Substituted Item Description   ☐ Stockless Item
Physical Nature Goods ▾   ☐ Amount Only
Buyer VP1 🔍   ☐ Inspection Required
       Buyer Information
       Configuration Info

▾ **Contract Information** ⑦

☑ Use Contract if Available
Contract ID WMF0000008 🔍 📇
             Contract Details
Version 1
Contract Line 1 🔍
Category Line 🔍

▾ **Supplier Information** ⑦

Supplier ID HC10023 🔍 Medical Equipment Rental Company
Supplier Location WCGEN 🔍 Wondercare General
Supplier GLN
             Suggest New Supplier
Supplier Item ID [   ]
Supplier's Catalog [   ]

▾ **Manufacturer Information** ⑦

Manufacturer ID CLINIPAD
Manufacturer Clinipad