

How To Enter a Contract

HOW TO CREATE A CONTRACT REQUISITION


A contract requisition is used when seeking professional services, service agreements, maintenance services, professional development workshops, etc. Entering a contract in BusinessPLUS is a **two-step process**. The contract should be first created in the **Contract Management – CMUPCM** screen, and then approved in the “**Enter Purchase Requests–POUPRC**” screen.

STEP 1

1. To create a Contract Requisition, begin by clicking on **Contracts Management – CMUPCM** on your **Schools / Departments Tab**. Please ensure that your source document provides the Budget Account Number, Vendor Name, Ship to address and any special notes.


2. Click on the **+ Icon** at the top of the screen to bring up a contract management – entry screen




3. On the “**Contract No:**” field, Click on the  **lightning bolt**, select **CONTNUM** and document your Contract No:



Contract No *

4. In the “**Contractor ID**” field enter the Contractor ID Number or look up the Contractor ID number by clicking on the  icon and selecting Lookup Ctrl+L

Contractor ID *

5. Enter a portion of the Contractor’s name and press **Enter** (it is not necessary to enter full name). The system will display names matching the characters entered. Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record.

6.

Data Lookup

Search ID Source: All

PE ID	Name	Security CD	Pedb Code
V600001467	AMERICAN WATER TREATMENT INC	VENDOR	P

1 - 1 of 1 items

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4
P1	6324 BARTMER INDUSTRIAL DRIVE			

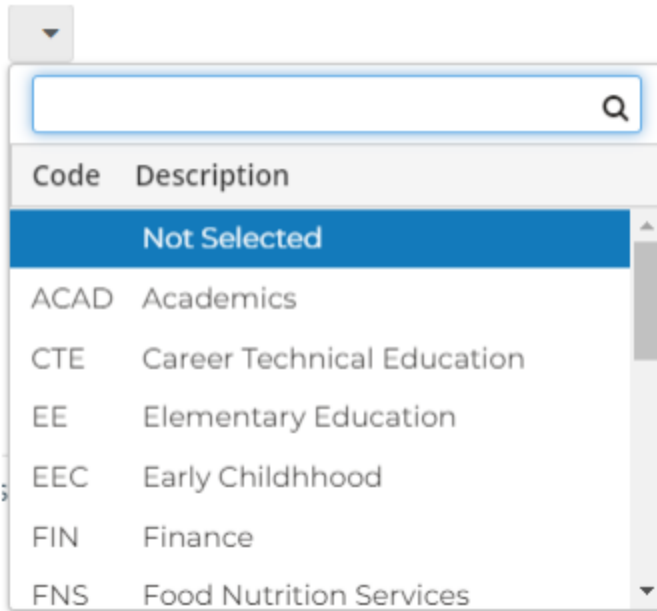
7.

8. In the "Desc:" field enter a brief description of the contract.

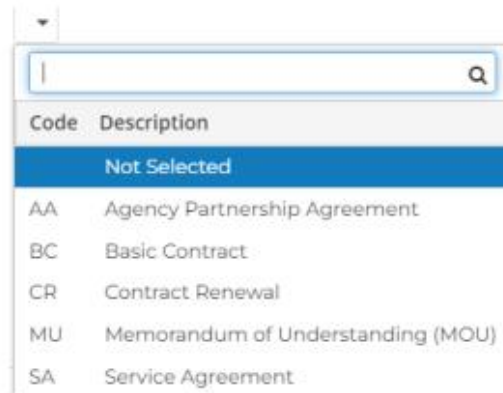
Desc *

Chemical water treatment contract

9. In the **Manager*** field clicking on the Dropdown button and select the Department that is responsible for managing the contract:



10. In the **Type*** field clicking on the Dropdown button and select the appropriate type of contract:



11. In the **“Original Amt”** enter the total dollar amount of the contract

12. In the **“Begin Dt”** field, enter the beginning date of the contract

13. In the **“Current End Dt”** field, enter the end date of the contract

14. Enter the **“RFP/Bid No:”** field, if applicable

15. On the **“Contract Details”** tab on the **“Comments”** field, enter contract details

Contract Details | Dates | Retainage | Amendments | Encumbrances


Security Cd: 9900 Human Resources Cycle ID: [v]

DBE Actual: 0.00 DBE Goal: 0.00

% Method To Use: [v] Percent Complete: 0.00

User 1: [v] User 2: [v] User 3: [v] User 4: [v]

Comments: [text area]

16. On the “Encumbrance” tab, click on the  ellipsis button and select “Lookup Account” to search for your specific line item account

Item No*: [input] 1 Fiscal Year: 2023 Request Dt*: 02/01/2023 Division: [v]

Item Total: 330,000.00

[+ Add Account](#)

Account							Amount
QL	110	2643	837902	9900	000000	00	330,000.00 Delete


Description*: new benefit management software

Posted to PO

17. Populate the applicable fields for the account you are using, and click **Ok**. A list will appear of account numbers for your department. Double click on the appropriate Account to have the system bring it up onto the Encumbrance tab.

18. In the **Description Field**, enter a Description that identifies the purpose of the Contract. **This Description will populate the Description Field on the Purchase Order.** In the **Amount Field**, enter the amount of the Contract.

19. To add attachments such as a “Contract” and / or “Letter to Proceed”, click on the

 Attachments

tab, on the left side panel of the screen. Click on “**Add Attachment**”. The “**Attachment Dialog**” box will appear, enter a Description in the **Description Field**. Click on **Browse**, Select your Document, Click on **Attach**.

Add New Attached Item

Description

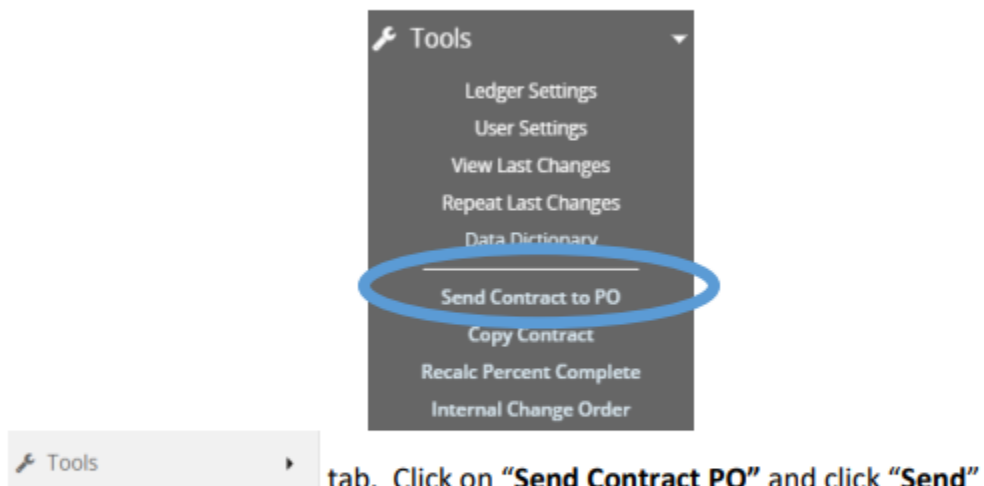
Browse... Choose Document

Contract - Contract Management

Close **Attach**

******Press Enter to save Contract to get "Record Accepted" message******

20. Once you have entered all information for the contract press, click on the



The image shows a 'Tools' dropdown menu with the following options: Ledger Settings, User Settings, View Last Changes, Repeat Last Changes, Data Dictionary, **Send Contract to PO** (highlighted with a blue oval), Copy Contract, Recalc Percent Complete, and Internal Change Order. Below the menu is a 'Tools' button with a right-pointing arrow.

tab. Click on **"Send Contract PO"** and click **"Send"**

21. You will see the below message if the job ran successfully:

Send Contract to PO

Contract No:

Processing Summary:

Task 1 of 5 - Contract amendment processing complete.

Successfully processed 0 amendments.

Task 2 of 5 - Send Contract to PO processing complete.

Contract was successfully sent to Purchasing.

Task 3 of 5 - Contract adjustment processing complete

Contract Amounts were successfully adjusted.

Task 4 of 5 - Pre-encumbrance processing complete

Task 5 of 5 - Encumbrance processing complete.

Encumbrance was successfully completed.

Close

Send

22. Once the contract is successfully sent to a PO, the contract requisition is routed through the Workflow System. You **must** log into the “Enter Purchase Requisition – POUPPR” screen to approve the contract from the workflow tab

Please Note: If the contract is not approved in the requisition screen, it is not processed, and a Purchase Order will never be generated!

STEP 2

WORKFLOW APPROVALS FOR CONTRACTS THROUGH “POUPPR” SCREEN

1. Begin by logging into BusinessPlus, click on the **Schools/Departments** Tab. Under **Workflow Approvals**, Select **PR Approval** . Please note: if you have the ability to initiate and approve requisitions, you will be required to approve all activities that you initiate.

Schools/Departments

The screenshot shows the BusinessPlus interface with the 'Schools/Departments' tab selected. The 'Workflow Approvals' section is visible, and a button labeled 'Go to Workflow Tasklist PR Approval St. Louis PS (1)' is circled in blue. Other sections visible include 'Purchase Requisitions, Orders an...', 'Contracts', 'Budget Transfers', and 'Reports'.

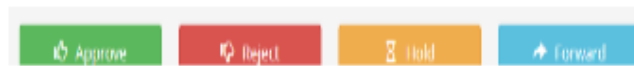
1. The pending requisition will be listed in the workflow click on **“Go to Workflow Tasklist”** in the Workflow Approvals box as pictured above. To view details of a transaction click anywhere on the gray box(s)



to expand and see the detailed information for that Purchase Requisition.

2. Slide the button  on the right to select the activity for approval.

3. To respond to the pending activity, select either of the following icons and submit:
 - a. **Green bar** = Approve
 - b. **Red bar** = Reject



2. Once the requisition is completely approved, a PO will be generated and sent to the vendor. The PO is then attached to the requisition in BusinessPLUS