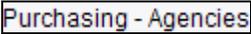
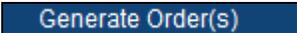
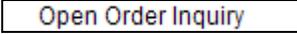
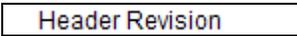
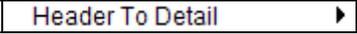
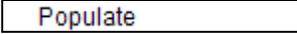


Generating a Service Contract (O4) from a Quotation Request (Z1) Lesson

Step	Action
1.	Click the State of Nebraska link. 
2.	Click the Purchasing - Agencies link. 
3.	Click the Contracts - Agency link. 
4.	Click the Gen Service Contract (O4) from Quote (Z1) link. 
5.	Enter any of the following search criteria in the appropriate field(s): ~ Order Number ~ Document Type ~ Account Number ~ Item Number ~ Business Unit (Branch/Plant) ~ Supplier
6.	Click the Find button. 
7.	Enter the quantity to be released to the vendor in the Release Quantity field for each line that you will release to the Service Contract.
8.	Click the Form button. 
9.	Click the Generate Order(s) menu. 
10.	The new Order Number and Or Ty (Order Type) will appear and should be noted if you wish to do more work with them or facilitate searches later.
11.	Revisions will need to be made to the Header of the contract. Click the Row button. 
12.	Click the Open Order Inquiry menu. 
13.	Click the check box of the document. 

Step	Action
14.	Click the Row button. 
15.	Click the Header Revision menu. 
16.	Review the Send Invoice To field. This is tied to the Ship to field, but you can override it if you need to.
17.	In the Cancel Date enter the date the contract is scheduled to end or work is to be completed. All contracts must have a cancel date per state statutes 73-501-73-509.
18.	Click the Additional Properties tab. 
19.	<p>Document Description</p> <ul style="list-style-type: none"> o All Service Contracts must indicate an overall description of the contract in the Document Discription field o Populate for a service requisition, this field can be used for free form text. It is helpful to fill this field in at the requisition level. Populate with data that describes the goods/services being procured. This information will print on reports. o This field can hold up to 30 alpha/numeric characters
20.	<p>Document Location</p> <ul style="list-style-type: none"> o Mandatory o Per state statute all Service Contracts must indicate where the documents may be found in the Document Location field o This field can be pulled from the address book. o This information is required by State Statute for contracts. o This must be a Address Book Search Type of “F” - facility
21.	<p>Document Contact</p> <ul style="list-style-type: none"> o Mandatory o Identifies the primary person responsible for the commodity or service requisition. This field can be pulled from the address book. o This must be an Address Book Search Type of “B, E, N, or X”.
22.	Click the Category Codes tab. 

Step	Action
23.	<p>The New/Renew field is used to indicate if the anticipated contract is new or a renewal.</p> <p>The Funding field may be used to indicate if American Recovery & Reinvestment Act (ARRA) funds are being utilized.</p>
24.	<p>Enter the desired information into the Funding field. Enter a valid value e.g. "AR".</p>
25.	<p>Changes to the Header requires population to the Detail Line.</p> <p>To do this click the Form button.</p> 
26.	<p>POPULATE HEADER TO DETAIL will appear in the Header box. If you forgot to populate the header to detail you will manually need to make the changes in the detail lines.</p> <p>Click the Header To Detail menu.</p> 
27.	<p>Click the Populate menu.</p> 
28.	<p>Click the OK button.</p> 
29.	<p>Review the detail lines and make changes as needed.</p>
30.	<p>Click the OK button.</p> 
31.	<p>Click the Close button.</p> 
32.	<p>Click the Close button.</p> 
33.	<p>Click the Cancel button.</p> 
34.	<p>You have successfully completed this lesson.</p> <p>End of Procedure.</p>