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Date: March 30, 2021

Object: Contract Record Creation and Maintenance

AUTHORITY

The present Directive is issued under the authority assigned to Procurement Services by the Procurement Policy.

PART I – PURPOSE AND SCOPE

Both internal and external audit findings have shown that McGill University does not maintain consistent processes of contract naming, tracking, spend monitoring and record keeping. The corrective action undertaken to address these issues were to acquire a contract management module, to integrate it with Banner and to develop a mandatory procedure for its optimized use.

PART II - INSTRUCTIONS

2.1. Mandatory application of the CCT Record Creation Procedure comes into effect for the creation of new records as of starting April 1, 2021.

2.2. All CCT records related to contracts currently in effect must be updated to comply to the Procedure.

2.3. Any exception must be approved in writing by the Director, Procurement Services. All exceptions will be reviewed periodically, in order to assess the need for revisions to the Procedure, or to other procurement processes.

PROCEDURE TITLE	**CCT RECORD CREATION AND MAINTENANCE**
Executive Sponsor	Francois Pouliot
Initial Approval Date	November 26th, 2020
Date of Last Review	February 26th, 2022
Related Documents	"UNSPSC Codeset Summary" file available here.
	"Jaggaer What is Integration? – Integration Basics" file available here.
	"Contract McGill Managed Catalog Items Template" file (to add/modify/delete products in a McGill Managed Catalog) available here.
	"Contract Products Import Export Request.xlsx" file (to add/modify/delete products from a Hosted or Punchout catalog to a Contract) available here.

PART I – PURPOSE AND SCOPE

This document describes the procedure to create the CCT record in MMP for external Suppliers.

PART II – PROCEDURAL CONTENT

There are two main sections in Part II. The first is a list of items that need to be addressed prior to configuring certain sections of the CCT record whereas the second section is the procedure to configure the record. There is also an appendix at the end of the document where additional information is shared.

Table of Contents

1 Supporting Information:

Note: The CCT record must be created as soon as the mandate is received, regardless of its projected value. However, the following information will need to be addressed prior to configuring certain sections of the record.

1.1 Supplier Validation

Once selected, the Supplier **cannot** be changed. It is therefore important that the Supplier be correctly configured in MMP before making any selection.

Does the Supplier already exist in MMP?

- If No, complete the New Supplier Request Form available here.
- It is strongly recommended that this be done as soon as possible.

Are any updates required to the Supplier in MMP? If yes:

- Contact the MMP Administrators for the following types of changes if the nature of the Contract requires it:
    o Preventing non-catalogue orders with the Supplier
    o Workflow changes specific to the Supplier in the Contract

- Contact the Vendor Administrator (vendor.purchasing@mcgill.ca) for the following types of changes:
    o New Supplier address, telephone number, email information, etc. Note, this is different than adding a Contact which can be done by a Buyer.
    o Adding a Contract flag to the Supplier (example one denoting the currency in use)
    o Any other Supplier related changes not listed here.

1.2 Catalogue

Note: For all sections under 1.2 (except for Section 1.2.2.1 – Alignment with the Financial Schedule), contact the MMP Administrators for support if needed.

For support related to 1.2.2.1, contact the Manager for Systems and Customer Support.

In addition to the Contracts resulting from mandates, expenses with an external supplier equal to or greater than $10,000 should be linked to a CCT Record and SKUs. As a minimum, the quote(s) obtained from the supplier (as well as any email authorization for emergency purchases) must be attached to such CCT Records. The Purchase Requisition workflow includes a step that checks if there is an attachment for those PRs with a value of $5000 and greater.

It is also possible to have a CCT Record with no SKUs when required. For example: bulk fuel or natural gas, where pricing is volatile and is reviewed daily. There would still be a Contract, but POs would be non-catalogue orders.

Three types of catalogues are available in MMP

- McGill-managed
- Hosted
- Punch-out

McGill-managed catalogues are always managed by the Buyers whereas Hosted are populated by the Suppliers and managed by Jaggaer, while Punch-out catalogues are typically fully managed by the Supplier.

Under exceptional cases, McGill can become responsible for maintaining and loading a hosted catalogue on behalf of the Supplier. The Buyer would then be responsible for populating the template while the MMP Administrators would be responsible for loading it.

1.2.1   Catalogue type decision

Please refer to the following table to guide the decision-making process as to which catalogue type should be selected.

Catalogue Type	Considerations
McGill-managed	- Managed by the Buyer - Supports up to 1000 products - Products and pricing are specific to the Contract (i.e. can only be used with one contract) - Purchases resulting from a Mandate, regardless of value that don't fit into the use of a Hosted or Punch-out catalogue - Should also be used for purchases between $10,000 and $100,000 that in the past would have likely been done as a non-catalogue order - Can be used to restrict ordering to only the catalogue items with the Supplier (i.e. no "free form" ordering) - McGill has total control over the catalogue Note, it can take between 1 to 10 business days to implement this type of Catalogue. However, the length of time to implement should not be used as a consideration in the decision-making process.

Hosted	- For Suppliers that can manage their own catalogues
	  o Would need access to the Supplier Portal
	  o Exception possible where a Hosted Catalogue is managed by Procurement
	- Supports up to 60K products
	- Can be used with one or more Contracts
	  o If used in more than one Contract, the Buyer will need to specify which products are included in each contract.
	  - Can be used to restrict ordering to only the catalogue items with the Supplier (i.e. no "free form" ordering)
	  - The Supplier provides the catalogue's contents, Jaggaer manages it while McGill retains vetting rights over the contents

	OR Exceptionally, the Supplier provides the contents and McGill both manages the catalogue and retains vetting rights over the contents. Note, it can take between 4 to 8 weeks to implement this type of Catalogue. However, the length of time to implement should not be used as a consideration in the decision-making process.

Punch-out	- For Suppliers that have their own Business to Business (B2B) solution (example Staples)
	   o Jaggaer supports cXML or EDI for B2B integration.
	   o Jaggaer will work with the Supplier to enable this.
	   o Supplier would have access to the Supplier Portal
	- Used when there is an excessive number of products and required when there are more than 60K
	- Can be used with one or more Contracts
	   o If used in more than one Contract, the Buyer will need to specify which products are included.
	- If the Supplier is unable to block products from their Catalogue that are not meant to be purchased at McGill, then this type of Catalogue cannot be used.
	   o In this case either McGill-Managed or Hosted would be required
	- The Supplier has total control over the catalogue
	
	Note, it can take between 6 to 12 weeks to implement this type of Catalogue. However, the length of time to implement should not be used as a consideration in the decision-making process.

1.2.2 Catalogue field recommendations and formats

Note: The following section applies only to those catalogues managed by the Buyers, more specifically McGill-managed catalogues and for those exception cases where they would manage a hosted catalogue.

1.2.2.1 Alignment with the Financial Schedule

The information in the Financial Schedule should feed directly into the Catalogue and be tied to how POs will be issued and Invoices will be paid. For example:

- Financial Schedule includes a monthly pest control fee of $200 for Burnside Hall
- Catalogue should have a SKU with a unit price of $200 and a unit of measure of MON.

Sometimes the Financial Schedule for a contract will be a quote or estimate. The pricing information they contain must then be used. For example:

- Quote includes translation services at $75 per hour
- Catalogue should have a SKU with a unit price of $75 and a unit of measure of HR

Each item in the Financial Schedule should include the McGill SKU and if applicable, a space for the Supplier to add their own Part Number as well. This will provide the Supplier with visibility on what the POs will look like as well as how they will have to create their Invoices.

1.2.2.2   Catalogue Number (SKU)
The following SKU naming convention was developed with the following objectives in mind:

- Easy to create while still allowing potential for valuable procurement data
- Not requiring the creation of a complex SKU management solution (process and tool)
- To work within the 50-character limit in Banner for the commodity line description field which combines the MMP Catalogue Number and Description fields (mandatory for quality reporting to government)
- Allow the flexibility of using Contract specific SKUs as well as re-usable ones.

With the above in mind, the following SKU naming convention was developed:

- Does not exceed 15 characters.
- Is unique to a Contract unless there is a requirement and/or added benefit to have them re-used in different ones.
- Must be distinctive from other SKUs, but not required to be descriptive (most Shoppers will search with the Description field).
- However, having some form of descriptive SKUs may be beneficial if there are numerous products and/or services in the catalogue.
- Do not repeat the same words in both the SKU and the Description (they are combined into one field in Banner – reserve maximum "space" for the description).
- Should not be defined to primarily support reporting (for example, to report on the type of goods or services purchased)
- For reference, the reasoning behind how the SKUs were defined should be listed as a thread under the Comments page of the Contract.

Examples

Naming Convention	Notes
<Contract Number>-<Sequence Number>	- C0000123-001, C0000123-002, C0000123-003, etc - Unique SKU's to the Contract and nondescriptive NOTE: This naming convention should be used by default unless there is a requirement and/or benefit to add some additional details to the SKU in the Contract.
<Contract Number>-<Labour or Material>-<Sequence Number>	- C0000044-L-001, C0000044-L-002, C0000044-M-001, C0000044-M-002, etc - Unique SKUs to the Contract and differentiates between Labour and Material

<i>building number</i>-CS	- 139-CS, 159-CS, 236-CS, etc - CS would indicate cleaning services for a building - These SKUs could be re-used in other Contracts. - The name of the building could be added in the Description field, ie Currie Gymnasium. MNI, Brown Building, etc
<i>building number</i>-CS-<i>type</i>	- 139-CS-Floors, 139-CS-Windows, 159-CS-Floors, 159-CS-Windows, 236-CS-Floors, 236-CS-Windows, etc - CS would indicate cleaning services but Floors, Windows, etc would differentiate the type. - The name of the building could be added in the Description field, ie Currie Gymnasium. MNI, Brown Building, etc -

1.2.2.3   Price Changes

Price changes, both planned and unplanned, will be managed by updating the price for an existing SKU.

- The unit price for each SKU would need to be updated just before the price change becomes valid.
- Updates can be done in bulk through file imports.
- Validation can be configured to catch those requisitions started with the original price but not completed before the price change. If needed, please contact the MMP Administrators.
- Price changes do not impact PRs (if already completed), POs or Invoices that used a previous price.

New SKUs must NOT be created for price changes for the following reasons:

- Will multiply the number of SKUs in the Catalogue.
- There is a risk that the wrong SKU/price will be selected in the requisition

In general, price changes should not impact any existing Purchase Orders as the price was agreed upon with the Supplier upon issue. However, under exceptional cases a Change Order may be needed to reflect the new pricing and would be decided on a case by case basis.

1.2.2.4   Unit of Measure

The most common Units of Measure to use are listed below. If you need one that is not listed, please contact the MMP Administrators.

CC	Cubic Centimeter
CM	Centimeter
CR	Cubic Meter
DAY	Day
EA	Each
HR	Hour
HT	Half Hour
KG	Kilogram
L	Liter
LB	Pound
M	Meter
MIN	Minute
MON	Months
MP	Metric Ton
TN	Ton
WK	Week
YR	Year

1.3   Supplier Integration

Jaggaer has prepared a guide to provide suppliers with an overview of Integration opportunities with Jaggaer and Jaggaer customers. This guide contains basic information on:

- Supplier Integrations team. Provides services to suppliers during the implementation process with JAGGAER customers.
- JAGGAER Solutions and Client Configurations. Basic information about the JAGGAER solutions available to customers, and some typical customer configurations.
- Supplier Integration Points. An overview of the available integration points and basic requirements, as well as additional information on resources that may be of help.
- cXML (commerce eXtensible Markup Language) is a protocol that defines eCommerce document formats and is intended for the exchange of transaction data between procurement applications and suppliers. cXML is an open source language that is published and freely available on the Internet.

The link for this guide is located on the front page under **Related Documents**.

2   Procedure

Although this procedure appears to be a linear process, it is actually not the case. Before creating a new CCT record, you must ensure that there is not an existing contract already in place for the same purpose. Once this has been determined and a new CCT record has been created as a result, the rest of the information can be filled in as it becomes available. Depending on the results of your tendering or negotiation, you may have to go back for certain steps or even create new records in CCT. ==The following are examples where one or more new records would be created:==

- ==When there is no existing contract already in place for the same purpose.==
- ==When a CFT allows for multiple suppliers.==
- ==When a wrong value has been selected that can't be modified (such as the Supplier, Currency, etc) and requires the creation of a new CCT Record.==

2.1   CCT Record Creation

Note: In MMP, the CCT Record is defined/displayed as a Contract, and therefore this term will be used in the procedure.

- Go to **Contracts Menu → Contracts → Create New Contract**…
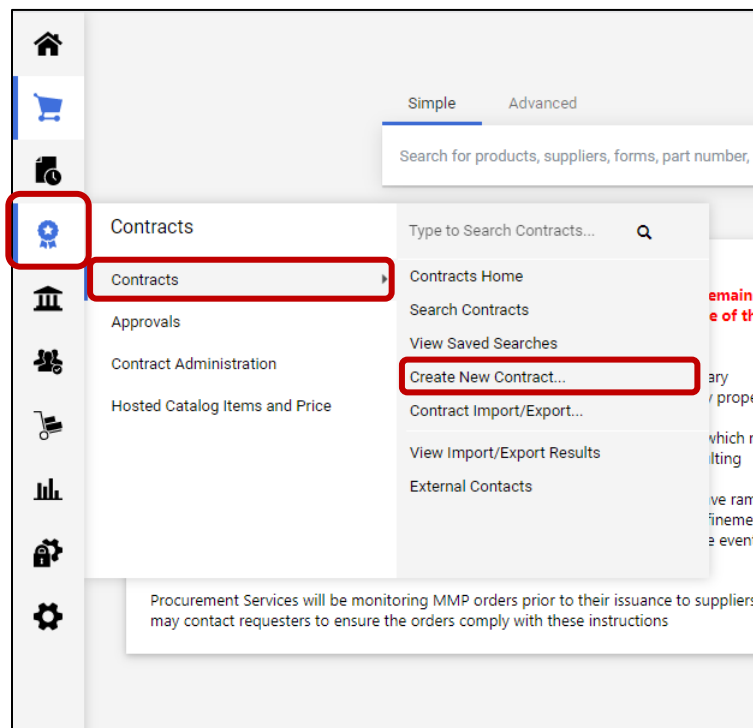
- Enter the **Contract Name,** select the **Contract Type** and **Currency** and click **Create Contract**.

Contract Name	Provide a meaningful name Do not include the name of the Supplier. Instead, indicate what the object of the Contract is (acquisition of which goods or services). If the Contract is for a recurring need, the year is often a good inclusion.
Contract Type	Select the type of contract: - *"A" – Concession Agreement* - *"A" – Master Agreement* - *"A" – Price Agreement* - *"C" – Acquisition of Immoveable Property (Lease or Purchase)* - *"C" – Cloud Services* - *"C" - Construction Works* - *"C" – Provision of Services* - *"C" – Supply of Goods* - *"P" – Certification* - *"P" - Qualification*
Currency	Select the Contract currency: - *CAD* - *GBP* - *USD* - *EUR* Note, once selected, the currency cannot be changed and must match the currency of the tender, the catalogue and the vendor.

- The new **Contract** will be opened with the **Header** page selected.

2.2   Header page

2.2.1   Contract Header section

CCT Record Creation

- Review the **Contract Number** and select the **Contract Status**.

Contract Number	The # assigned by the system is the <u>Contract Number</u>. It is not to be confused with the project # and should not be labeled as the CFT # either.
	The Contract Number also survives multiple CFTs (assuming the first CFT gets cancelled, when you return to tender for the same need, you are still trying to select a supplier for the same Contract Number). In these cases, the same CCT record is used for multiple CFTs.
	Do not modify the system generated value unless a valid exception has been identified. Use the **Edit** (pencil) image to make a change when required.
	Some exceptions where you would override the system generated value include group buy initiatives (CAG) with their own Contract Number, replicating a contract having multiple suppliers (ie IT consulting services).
	Editing the system-generated value can also be done when re-creating a previous CCT record because of an error, such as when the wrong Supplier has been selected and can't be modified.
	Important note, do NOT recycle previous CCT numbers for a new contract.
Contract Status	Leave blank (unselected)

- Click **Edit Summary** to open the **Contract Summary** window.

Contract Summary	Enter a meaningful summary for the Contract such as the one in the tender document. Options are to use Rich Text, add images, URLs, etc.
	Notes:
	- If the CCT record is no longer be required, example the project is cancelled, then the Summary needs to be updated with the wording "Cancelled" at the top.
	- If the Contract was approved even if there were non-compliances with the normal process, the Summary will need to start with one of the following:

	o Non-compliance due to no Privacy Addendum
	    o Non-compliance due to hosting / access point locations
	    o Non-compliance due to IT Risk
	    o Non-compliance due to standard contract requirement

- Click **Done**.

2.2.2 Contract Header section - Supplier

NOTES: This section can be skipped until the Supplier has been selected.
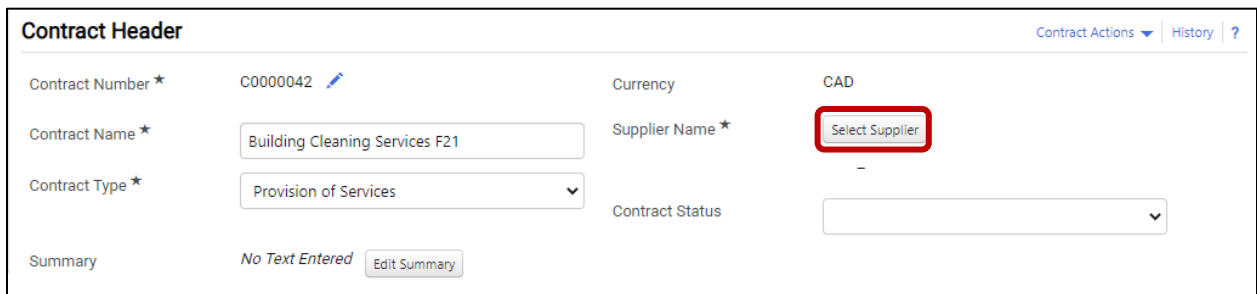
WARNING:

> <u>DO NOT</u> select the supplier in the following cases:
>
> - When using a McGill Managed Catalogue and the Supplier requires a Billing Portal in MMP to be setup.
> - When using a Hosted Catalogue or Punch-out Catalogue and the Supplier still needs to be setup in MMP
>
> In these cases, the Enablement Team will select the Supplier for the Contract once they are configured.
>
> It is also important to note that the selection cannot be changed once saved. If the wrong one was selected, then a new contract will have to be created!
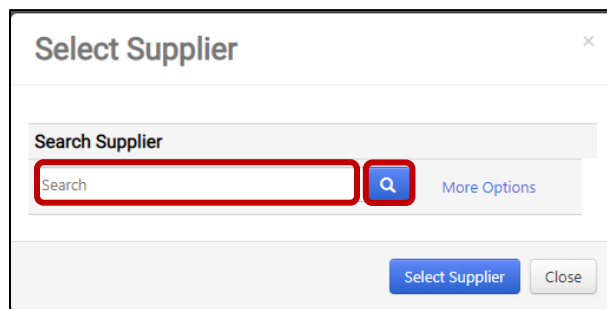
- Click **Select Supplier** to open the **Select Supplier** window.

Search Supplier	Enter the name or partial name of the Supplier.
	Note, changing the name of the Supplier on the Supplier Record will be reflected in the Contract as well as in subsequently issued Purchase Orders.

- Click on **Search**.

CCT Record Creation

- Select the Supplier from the **list** and click **Select Supplier**.

Supplier Name	If the Supplier is not listed and you have already completed the New Supplier Request Form, please send an email to vendor.purchasing@mcgill.ca to ensure that the Supplier has been configured. - If this is a new Supplier and you haven't already completed the New Supplier Request Form, please do so at https://www.mcgill.ca/procurement/forms/new-supplier-request. You will need to wait until the Supplier has been created. - If the Supplier has multiple records, ensure that you select the right one. For example, there could be one record per currency, and you would need to choose the one that matches the currency of the Contract. - You may also want to check for both the English and French iterations of the Supplier's name as not all of them are entered in English.

CCT Record Creation

	- If still unsure of which Supplier to select when there is more than one, please refer to section *3.1 – "Search Suppliers"* to first find the correct **Supplier Number** that can then be compared to the value displayed when clicking on the **Supplier Info** image for each record returned.

- Select a **Contact** from the drop-down list and click **Done**.

Choose a Contact	If there are no contacts, or you need to add a new one, select **Add Contact** from the drop-down list, enter all the relevant information and click **Done**. This should be the main contact from the Supplier working on the Contract with McGill.

CCT Record Creation

2.2.3 Dates and Renewal section
- Set the **Time Zone**, **Start Date**, **End Date**, **Automatically Apply Price File with Renewal** and **Auto-Renew** and enter the **Renewals Remaining** and **Renewal Term**.

Time Zone	Do not modify the default value unless a valid exception has been identified.
Contract Start Date	Enter the start date of the Contract. This may be different from the signature date and indicates the Contract Effective Date. Occurs when the delivery of goods or services do not start upon signature.
Contract End Date	Enter the end date of the Contract. Corresponds to the expiry date, if no extension is exercised
Extensions Remaining	Enter the number of extensions available with the Contract. Strictly speaking, this does not represent a renewal at McGill. A renewal must be understood to be a new contract with the same terms and conditions as the previous one. This would require a new CCT Record.
Automatically Apply Price File with Renewal	Set to **No**.
Extension Term	Enter the **Number** and select the Unit of Measure (**Days**, **Months**, **Years**) from the drop-down list. Represents the term of each extension that is available with the Contract. By opposition, a "renewal" must be understood to be a new contract with the same terms and conditions as the previous one. This would require a new CCT Record.
Auto-extend	Set to **Yes** or **No** depending on the provision of the Contract.

CCT Record Creation

	This represents whether the extension is automatically applied to the Contract unless otherwise communicated by McGill to the Supplier.
Auto Extend Creation	Only available if **Auto-extend** has been set to **Yes**. Enter the number of days before the end of the Contract where the extension will be created.

2.2.4 Additional Details section

- Select the **Contract Method and On Demand Contract** and enter the **SEAO Number**, **Sources of Funding** and **Contract Signature Date**.

SEAO Number	Enter the **SEAO Number** for this Contract.

Contract Method*	Select from the following options:
	  - **Call for Tenders (CFT)**
	  - **Tender by Invitation**
	  - **Mutual Agreement**

Source(s) of Funding	Enter the source(s) of funding such as CFI, NSERC, Capital Funds, etc.
On Demand Contract	Set to **Y** if multiple POs will be issued against the Contract. *If this is a GACEQ/CAG or any Group Buy contract, DO NOT use the Y flag as this indicator is used to post Final Amounts to SEAO.* If not, leave Blank.

CCT Record Creation

| Contract Signature Date (mm/dd/yyyy) | Enter the date when the Contract was signed. |

2.3 Attachments page

2.3.1 Attachments section
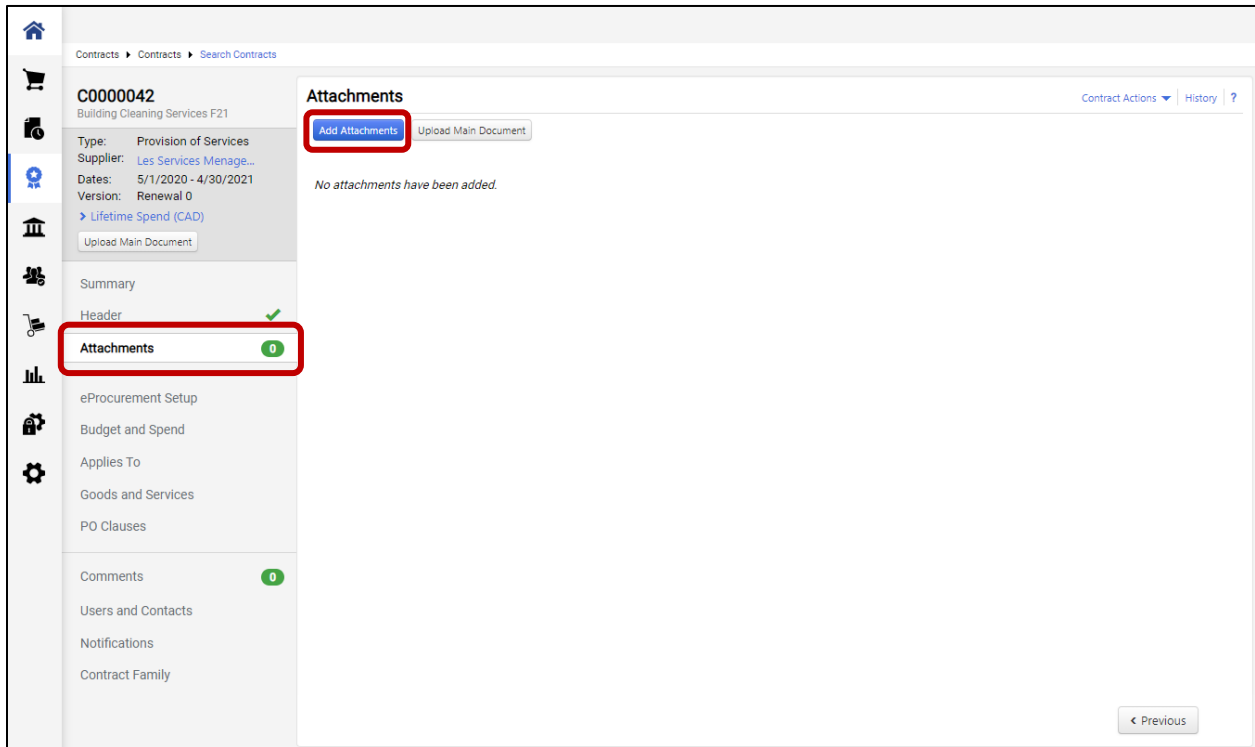
- Click on **Add Attachments** to open the **Add Attachments** window
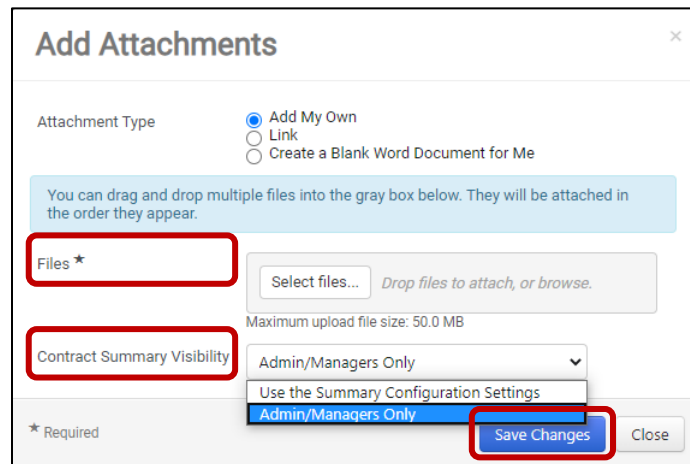
- Add all the required Files for this Contract

Files	Options are to browse and select OR drag and drop the files.
	
	The following files must be added:
	
	"Contract C000XXXX" (saved as a PDF Portfolio file and uploaded as "Main Document" in CCT). The following, separate PDF files must be inserted in the PDF Portfolio:
	
	   - Terms and Conditions (saved as C000XXXX_T&C)
	   - Screen capture of SEAO notice pages, as the case may be (saved as C000XXXX_SEAO)
	   - Goods or Services Description (saved as C000XXXX_DoG for goods or C000XXXX_DoS for services, as the case may be)
	   - Appendix (Performance Evaluation Table, Dispute Resolution, other CFT or negotiation documents shared with the supplier) (each saved as C000XXXX_App[#])
	   - (Winner's) Financial Schedule (saved as C000XXXX_FS)
	   - (Winner's) Quality Demonstration, as applicable (saved as C000XXXX_QD)
	   - Any Statement of Work (saved as C000XXXX_SoW)
	   - Signed Contract Execution Form (saved as C000XXXX_SoC)
	
	"Backup Contract C000XXXX" (saved as a PDF Portfolio file and uploaded as "Attachment" in CCT). The following, separate PDF files must be inserted in the PDF Portfolio:
	
	   - Procurement Mandate (saved as C000XXXX_Mandate)
	   - CFT or Negotiations Package (saved as C000XXXX-[suffix as per the previous section], even if this includes a repeat of the files included in the Main Document PDF Portfolio)
	   - Eligibility and Compliance verification checklists (saved as C000XXXX_verification)
	   - (Signed) Selection committee pledges (saved as C000XXXX_SC Pledge)
	   - Tender documents (from other bidders) (saved as C000XXXX_tender-[bidder name]
	   - Completed /signed Evaluation matrix (saved as C000XXXX_QE-signed)

	- Contract approvals (saved as C000XXXX-approval) - NORFI or NOI documents and responses - Critical correspondence, including any complaints and responses (Each saved with a meaningful title, using C000XXXX as a prefix) "Contract C000XXXX – editable version documents" (saved as a .zip or PDF Portfolio file and uploaded as "Attachment" in CCT). The .zip or PDF Portfolio must include <u>as separate files</u>: - The final versions of the working files available for any of the above (Word, Excel, PPT, Fillable PDF formats). - There are no document nomenclature prerequisites for the editable version documents. However, always try to make it as easy as possible to identify.
Contract Summary Visibility	Select **Admin/Managers Only** to limit the visibility for each attachment.

- Click **Save Changes**.

- Using the **Action** button, select **Set as Main Document** for the file considered as the Main Attachment for the Contract ("Contract C000XXXX").

CCT Record Creation

2.4 eProcurement Setup page

2.4.1 eProcurement Setup section

- Set **Active for Shopping**, **Restrict Products To**, **Automatically Apply Purchases from this Supplier to this Contract** and **Allow Portal Invoice Enabled Suppliers to Edit Contract Item Price**.

Active for Shopping	Set to *No.* ONLY set it to **Yes*** when purchases are ready to be made against the Contract. * Note will only be available when current date is within the Contract Start and End Dates.
Restrict Products To	If using a McGill-Managed catalogue: - Set to **Only for Specified Products** - You do not need to specify any Product Numbers under the **Applies To** section. If using a Hosted or Punchout catalogue: - Set to **Any Supplier Product** when there is only one Contract for this Supplier and ALL goods and services in the catalogue are applicable.

CCT Record Creation

	- Set to **Only for Specified Products** when ONLY certain goods and services in the catalogue from the Supplier fall under this Contract. o You MUST specify which Product Numbers apply under the **Applies To** section. Note, if set to **Only for Specified Products**, then any Non-catalogue items cannot have the Contract Number assigned. If there is a situation where this is needed and not all of the goods and services in the Catalogue are included in the Contract, then the following must be done: - Set **Restrict Products To** to **Any Supplier Product** - Set **Automatically Apply Purchases from this Supplier to this Contract** to **No** (please read the note in the next setting to understand the risks associated with this)

Automatically Apply Purchases from this Supplier to this Contract	If using a McGill-managed catalogue:
	- Set to **Yes**
	If using a Hosted or Punchout catalogue:
	- Set to **Yes**.
	    o The Contract Number will automatically be applied to the line item of a Product included in the Contract.
	    o If this is not done there is a risk that not all the Contract spend will be accounted for as the user will be responsible for selecting the Contract Number per line item.
	
	Note, there is only one case where this should be set to **No** and is described in the previous setting (**Restrict Products To**). However, this puts the onus on the user creating the PR to select the correct Contract Number on each line item.

Blanket PO Number	Leave blank
Allow Portal Invoice Enabled Suppliers to Edit Contract Item Price	Always set to **No**

2.4.2 Payment Terms, Pricing, Supplier Visible Custom Fields, Code Defaults on Invoice and Display Options in Browse Contracts sections

- Leave as is, no changes required.

Payment Terms

Payment Terms				
	Discount	% ⌄	Days	Net

Pricing

This supplier is not configured for catalog pricing.

Supplier Visible Custom Fields

Do you want portal invoicing enabled Suppliers to complete the selected Custom Field on Invoices created from this Contract? ○ Yes ◉ No

Available Custom Field — *There is no supplier visible custom field configured*

Code Defaults on Invoice

These code defaults are applied to invoice line items from this contract.

FOPAL Information   Add

Chart	Fund	Organization	Account	Program	Activity	Location
no value	*no value*	*no value*	*no value*	*no value*	*no value*	*no value*

Display Options in Browse Contracts

Show Generic Non-Catalog Item in Browse Contracts
○ Yes
○ No
◉ Inherit From Contract Type -- Current Setting: No

2.5 Budget and Spend page

Note: Unless required by exception, information for **Budget**, **Limits Per Requisition** and **Limits Per Invoice** will not be entered for the Contract. If they do need to be entered, please contact the MMP Administrators for additional details.

- This page can be used to view the PR, PO and Invoice Spend per Contract Version (**Actual Spend by Version** and **Lifetime Summary** sections)
- To view the list of PRs, POs and Invoices included in the totals, click on the appropriate spend amount field.

CCT Record Creation

2.6   Applies To page

2.6.1   Department or Role section

Note: This section controls who has access to shop against the Contract. In general, every role in MMP will be able to do so unless an exception has been identified. In these cases, shopping can be limited to certain roles in this section. If the Contract or authorized usage thereof dictate that it should be limited to specific users, then this would be achieved in the **Additional Users** section.

- Set **Grant access to this contract using Departments and Roles**, **Departments with access to this Contract** and **Roles with access to this Contract**.

Grant access to this contract using Departments and Roles	Leave this option selected unless shopping needs to be limited to specific users. If this is the case, unselect the option. The users will be selected under the **Additional Users** section.
Departments with access to this Contract	Leave blank.
Roles with access to this Contract	Leave as **Apply to All** unless for an exception reason you need to limit which roles will have access to the Contract. If an exception has been identified, then move the roles from **Available Roles** to **Roles with access to this Contract** using the **Right Arrow** button. You can also effectively remove all Roles and replace with individual Additional Users only.

CCT Record Creation

2.6.2 Additional Users section

- If you have limited the access to the Contract under **Department or Role** and need to grant exclusive or additional access for one or more specific users, click on the **Add Users** button to add them.

CCT Record Creation

2.6.3 Product/SKU section

Note: **ONLY** add Catalogue Numbers / SKUs if both of the following apply:

- Using a Hosted or Punchout Catalogue
- **Restrict Products To** has been set to **Only for Specified Products** under **eProcurement Setup**
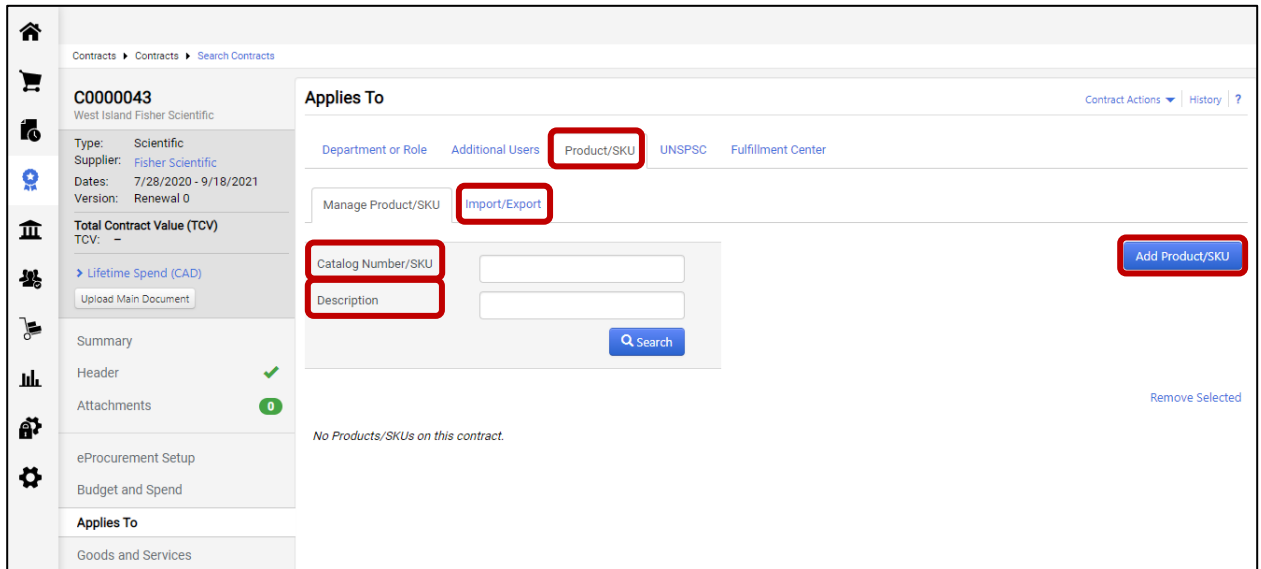
Catalogue Number / SKU	This field is used to search for products already added to the Contract.
Description	This field is used to search for products already added to the Contract.
Import/Export	Allows you to upload all the applicable Products / SKUs from a tab delimited text file to the Contract. This method should be used when you have several records to add.
Add Product/SKU	Opens a window where you can add Products/SKUs one a time to the Contract. This method should only be used when you have a limited number of records to add.

CCT Record Creation

2.6.3.1 Adding Products/SKUs one at a time to the Contract

Note: This feature allows you to add one product at a time to the Contract. If there are several products to add, it is suggested to use the import feature.

- Click on the **Add Product/SKU** button to open the Add Product/SKU window

Catalogue Number / SKU	The value entered MUST match the part number from the catalogue.
Description	The value entered MUST match the description from the catalogue.
Supplier Size	The value entered MUST match the supplier size from the catalogue.
Supplier Packaging	The value entered MUST match the supplier packaging from the catalogue.
Color	The value entered MUST match the color from the catalogue.
Contract Unit Price	The value entered MUST match the unit price from the catalogue. Note, a difference between the **Contract Unit Price** and the Unit Price in the catalogue will result in a message for any new requisition stating, "Price differs from the contract."

- Click on the **Add** button.
- Repeat this section for each Product/SKU that needs to be added to the Contract.

CCT Record Creation

2.6.3.2 Importing multiple Products/SKUs to the Contract

Note: This feature allows you to import contract related products in "bulk"

Also, importing a file will **replace ALL** items currently associated to the Contract. If the list of Products needs to be modified, please see section *2.6.3.5 – "Adding, updating and deleting multiple Products/SKUs with an import"* for more information.

- Click on **Import/Export** to open the Contract Products Import / Export Request

- If you are using the Excel version of the template (Contract Products Import Export Request.xlsx), you can skip the next few steps that detail how to open .txt file in Excel. If not, click on the **Click to download** link to download the latest version of the template.

- Open the downloaded file (ContractProductImportExportTemplate.txt) in Excel as a Delimited text file and click on **Next**.
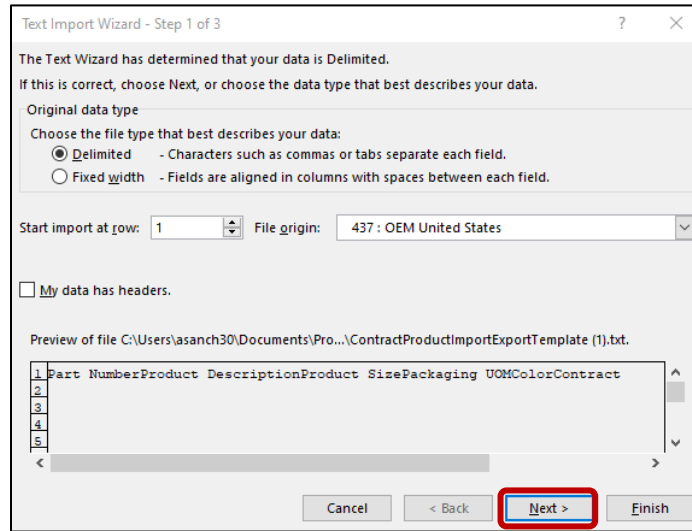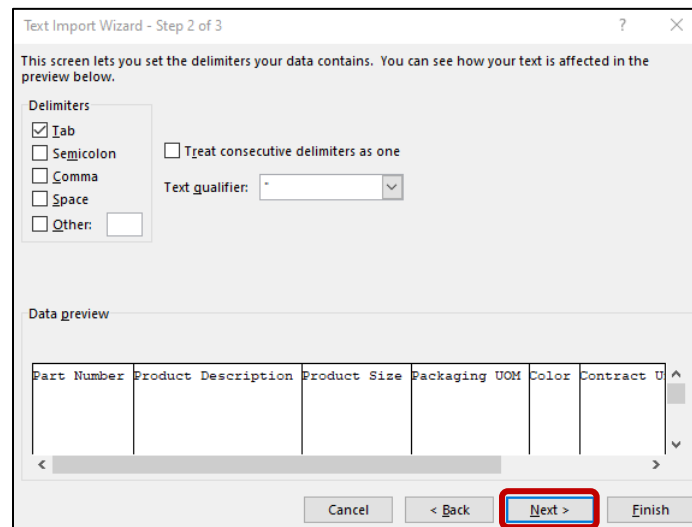
- Click on **Next**.

CCT Record Creation

- Click on **Finish**.

- Fill in the fields for each Product/SKU to be added to the Contract.
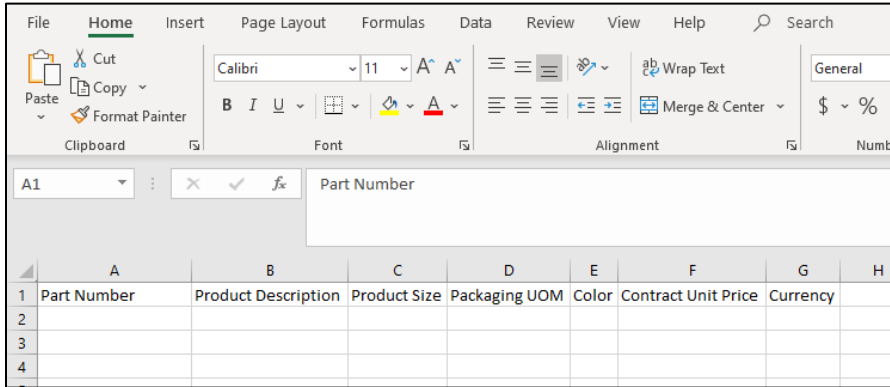
Part Number	The value entered MUST match the part number from the catalogue.
Product Description	The value entered MUST match the description from the catalogue.
Product Size	The value entered MUST match the supplier size from the catalogue.
Packaging UOM	The value entered MUST match the supplier packaging from the catalogue.
Color	The value entered MUST match the color from the catalogue.
Contract Unit Price	The value entered MUST match the unit price from the catalogue. *Note, a difference between the **Contract Unit Price** and the Unit Price in the catalogue will result in a message for any new requisition stating, "Price differs from the contract."*
Currency	The value entered MUST match the currency of the Contract and the catalogue.

- Once completed, save the file as a *Text (Tab delimited) (*.txt)* file with a meaningful name.

CCT Record Creation

- Under **Import/Export**

Action	Select *Validate*
	It is recommended that the file first be validated for errors prior to importing its contents.
	- **Import**: To import the list of Products/SKUs from a tab delimited text file.
	- **Export**: To export the current list of Products/SKUs on the Contract to a tab delimited text file.
	- **Validate**: To validate there are no errors with the tab delimited file prior to uploading its contents.
Description	Provide a description related to the action you are performing, ie Import, Export or Validate.
File Name	Select the file saved in Excel using the **Choose File** button.
Submit	Click on this button to validate the file.

- The request is displayed as pending. Click on the **Refresh this Page** button until the information is updated.

- If any errors are found (**Records with errors/duplicates**), click on the file name link to see the details.

- Correct any errors and validate the file once again following the same instructions.
- If no errors were found, then click on the **Click to import…** link.

- Click on **Ok**

- The request is displayed as pending. Click on the **Refresh this Page** button until the information is updated.

- Once imported, the request status should be updated to *Completed*

- Click on **Manage Product/SKU** to view the results

2.6.3.3 Modifying Products/SKUs one at a time

- Click on the Catalog Number/SKU that you wish to edit to open the **Edit Contract Product Window**.

- Make all the required changes and click on **Save.**

CCT Record Creation

2.6.3.4 Deleting one or more Products/SKUs with the Remove Selected link.

- Select the Products/SKUs to be removed and click on the **Remove Selected** link.

Catalog Number/SKU ▲	Description △	Supplier Size	Supplier Packaging	Color	Price (CAD)	
					Remove Selected	
2217733	Mat, Platform; Fisher Scientific; For use with Incubating Rockers; Dimpled; Non-slip	1	EA	–	62.84	☑
FB4417	Probe; Fisher Scientific; For Model 705 Sonic Dismembrator; 0.625 in. probe; Processing volume: 0.2 to 5mL; 1/EA	1	EA	–	502.92	☐
FSGPD05	Bath, Water; Fisher Scientific; Isotemp; General Purpose Deluxe; Digital; 5L (1.3 gal.); Amb. to 100C; 120V/230V, 50/60HZ; 1/EA	1	EA	–	966.55	☑
HP88857290	Hotplate, Fisher Scientific, Isotemp, 7.25 x 7.25 in., Ceramic, Max. Temp: 450 deg. C, 100-120V 50/60Hz US style plug, 1/EA	1	EA	–	801.73	☐

- Click on **Yes** to confirm.

Remove Product/SKU   ×

Are you sure you want to remove the Product/SKU?

[Yes] [No]

- The selected Products/SKUs have been removed

Catalog Number/SKU ▲	Description △	Supplier Size	Supplier Packaging	Color	Price (CAD)	
					Remove Selected	
FB4417	Probe; Fisher Scientific; For Model 705 Sonic Dismembrator; 0.625 in. probe; Processing volume: 0.2 to 5mL; 1/EA	1	EA	–	502.92	☐
HP88857290	Hotplate, Fisher Scientific, Isotemp, 7.25 x 7.25 in., Ceramic, Max. Temp: 450 deg. C, 100-120V 50/60Hz US style plug, 1/EA	1	EA	–	801.73	☐

2.6.3.5 Adding, updating and deleting multiple Products/SKUs with an import

Note: Importing a file will **replace ALL** items currently associated to the Contract. The exporting feature can be used for easy editing of the file in Excel and re-importing of the products to the Contract.

- If you still have the original Excel file used to populate the Products/SKUs and have not made any changes directly in the Contract, then you can skip the next few steps on exporting the current values. If not, click on **Import/Export** to open the Contract Products Import / Export Request.

Action	Select **Export** from the dropdown list
Description	Provide a description related to the action you are performing.
Submit	Click on this button to export the file.

- The request is displayed as pending. Click on the **Refresh this Page** button until the information is updated.

CCT Record Creation

- Download the file by clicking on the file name link.

- Please refer to the information under section *2.6.3.2 – "Importing multiple Products/SKUs to the Contract"* to perform the following steps with the exported file.
  - o Open the downloaded file in Excel as a Delimited text file.
  - o Make all required changes in the file (adding new records, editing existing records and deleting records).
  - o Save the file.
  - o Validate the file.
  - o Import the file.

- The list of Products/SKUs will be updated with the records from the import file.

2.6.4 UNSPSC section
- Leave as is, no changes required.

2.6.5 Fulfillment Center section
- Leave as is, no changes required.

CCT Record Creation

2.7   Goods and Services page

2.7.1   Forms section

- Leave as is, no changes required.

CCT Record Creation

2.7.2 Ordering Instructions section

- Set the **Display in Product Search Results** and **Image** and enter the **Product Description**, **Additional Information** and **Ordering Instructions**.

Display in Product Search Results	Select **Yes**. This will make the information from this section visible in the Product Search results.
Product Description	Keywords available for the Product Search.
Additional Information	This field is limited to 500 characters and will appear in the Product Search Results. You must type the following sentence at the end: "Please click on **More Info** to view any Ordering Instructions."

	In addition to the above sentence, provide the key contacts for this Contract, such as the Account Manager as well as Customer Service. "Customer Service" can be internal to McGill or external (from the Supplier), depending on how the Contract is meant to be set up for users, with an intermediary or not (example: Security Services) Additional information can be provided, space permitting, but **Ordering Instructions** should not be listed here. Hyperlinks to any relevant pages or files on the web can be added using the **Insert hyperlink** button ( ). Ensure that you select **Open link in new window**.
Ordering Instructions	There are three options available from the dropdown list, **None**, **Use Rich Text** or **Use Attachments**. If using text, there is a maximum of 5000 characters. Any required ordering instructions for the shopper should be provided here, such as lead times, insurance costs, shipping methods, delivery instructions, etc. If needed, the ordering instructions can be included in one or more documents instead of using text. The files can be added by selecting **Use Attachments** from the drop-down list and uploading them to the Contract.
Image	Select **Display the Supplier Icon** from the dropdown list. Note, if the image does not appear when you preview how the Contract Information will appear (by clicking on the **Preview**

	button), you will need to contact the MMP Administrators to have the image loaded in MMP with the Supplier and be available.

- Click on **Save Changes** then click on **Preview** to view how the Contract information will appear in the Product Search Results.

Product Description

Additional Information

Ordering Instructions

Image

Using Rich Text

Using Attachments
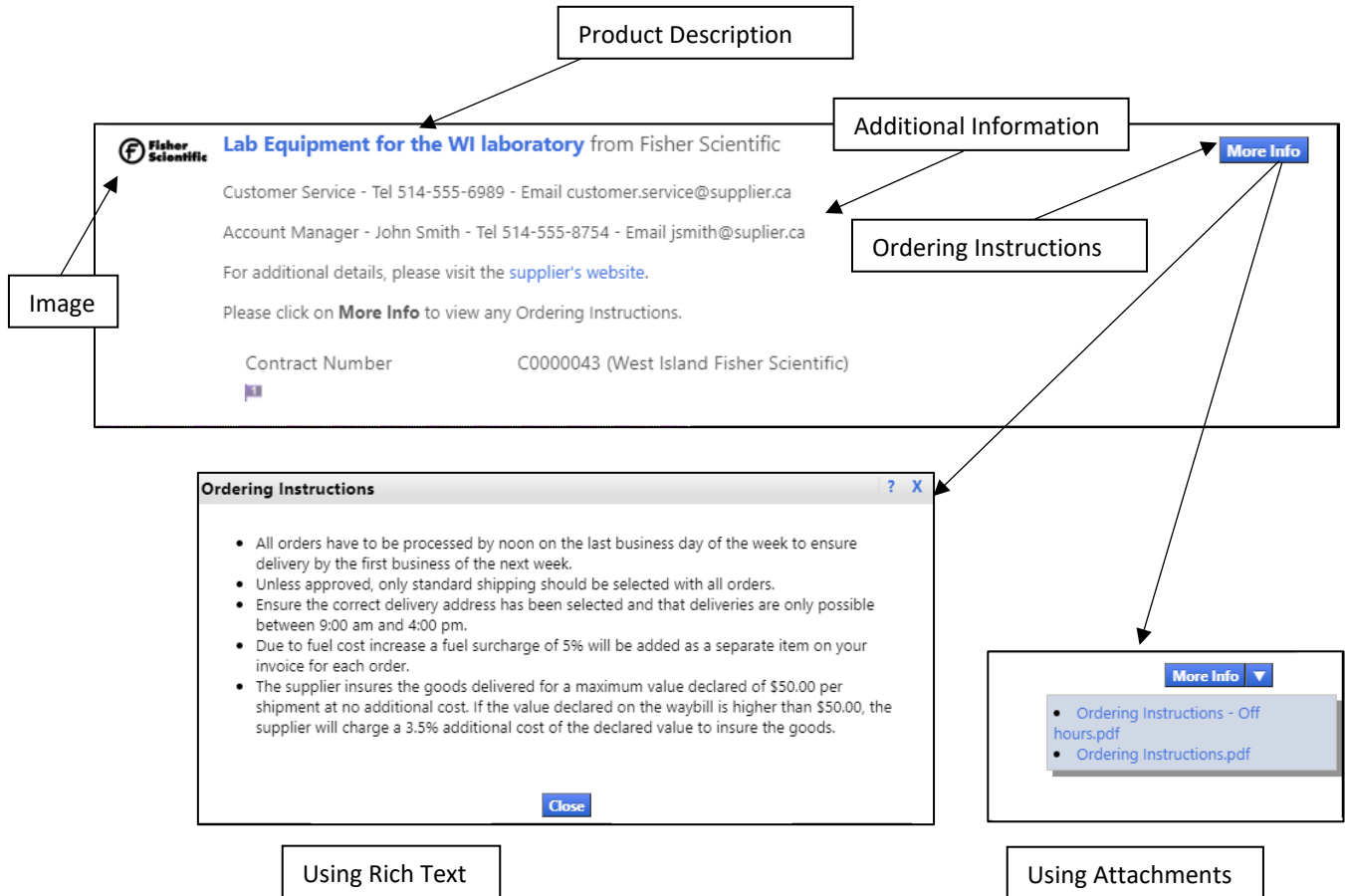
2.7.3 McGill Managed Catalog Items section

Notes: **ONLY** add McGill Managed Catalog Items if this Contract is being created with a McGill-Managed Catalogue.

See section *1.2.2 – "Catalogue field recommendations and formats"* for information related to some of the fields in the Catalogue.

2.7.3.1 Adding McGill Managed Catalog Items one at a time to the Contract

Note: This feature allows you to add one Catalog Item at a time to the Contract. If there are several to add, it is suggested to use the import feature.

- Click on the **Add McGill Managed Catalog Item** button to open the Add Product/SKU window

Description	Provide a meaningful description for the Catalog Item
Catalogue Number	Enter a value that follows the naming convention for Catalog Numbers and is aligned with the Financial Schedule See section *1.2.2.2 – "Catalogue Number (SKU)"* for more information.
Size	Leave blank
Price	Enter the unit price as per the Financial Schedule or quote
Packaging (UOM)	Enter the unit of measure as per the Financial Schedule. See section *0 – "*

CCT Record Creation

	Unit of Measure” for more information on the values to use for this field.
Promote in product search	Ensure this option is selected.
UNSPSC	Enter the corresponding value at the FAMILY level (ie first 4 characters followed by four 0s) for the item. Please refer to the UNSPSC Codeset Summary file.
Manufacture Name	Must be listed for all goods. Leave blank for services.

Note: All other fields are optional.

- Click on **Save** once all the changes have been done.

2.7.3.2   Importing multiple McGill Managed Catalog Items to the Contract

Note: This feature allows you to import contract catalog items and updates in "bulk". If you have more than 100 items, you will need to upload them 100 items at a time.

Unlike the import file used with Products/SKUs when using hosted and punch out catalogs, an import of McGill Managed Catalog Items does not automatically overwrite the existing records. Instead the import can be used to add, modify and delete only those products included in the file.

- Click on **View Import/Export Results** to open the Contract McGill Managed Catalog Items Import / Export Request

- If you are using the Excel version of the template (Contract McGill Managed Catalog Items Template.xlsx), you can skip the next few steps that detail how to open .txt file in Excel. If not, click on the **Click to download** link to download the latest version of the template.

CCT Record Creation

- Open the downloaded file (ContractItemsImportExportTemplate.txt) in Excel as a Delimited text file and click on **Next**.

- Click on **Next**.

CCT Record Creation
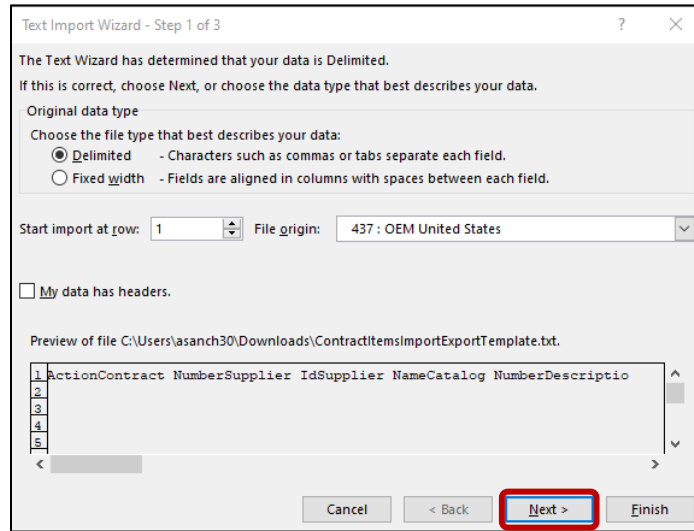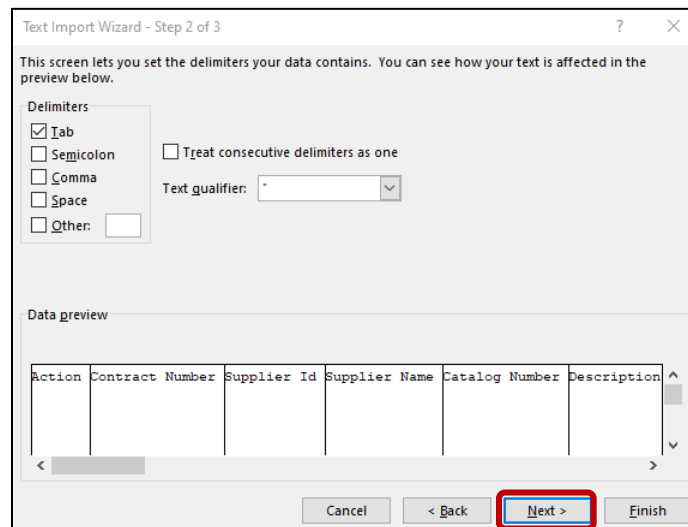
- Click on **Finish**.
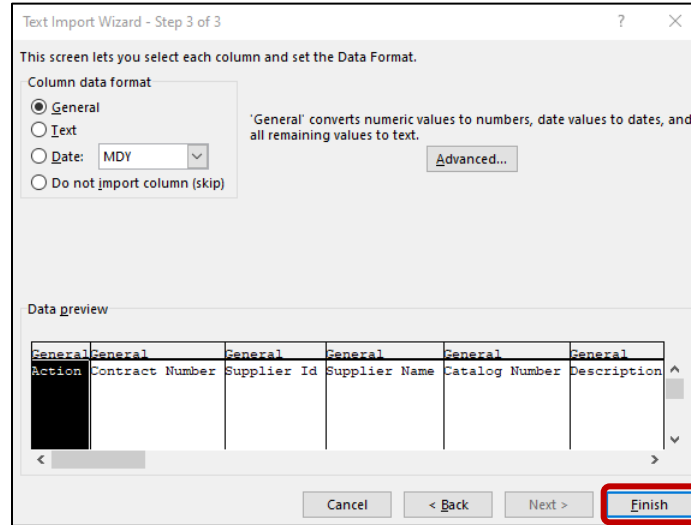
- Fill in the fields for McGill Managed Catalog Item to be added to the Contract.

Action	Enter **MODIFY** as the value.
	If the Catalogue Number does not exist, a new record will be added. *If the Catalogue Number already exists, then the record will be updated*
	Note, to delete a record, the value for **Action** should be set to **DELETE**.
Catalogue Number	Enter a value that follows the naming convention for Catalog Numbers and is aligned with the Financial Schedule

	See section *1.2.2.2 – "Catalogue Number (SKU)"* for more information*.
Description	Provide a meaningful description for the McGill Managed Catalog Item
Size	Leave blank
Price	Enter the unit price as per the Financial Schedule
Promote in product search	TRUE
Packaging (UOM)	Enter the unit of measure as per the Financial Schedule. See section *0 – "* *Unit of* Measure*"* for more information on the values to use for this field.
UNSPSC	Enter the corresponding value at the FAMILY level (ie first 4 characters followed by four 0s) for the item. Please refer to the UNSPSC Codeset Summary file.
Manufacturer Name	Must be listed for all goods. Leave blank for services.

Note: All other fields are optional.

- Once completed, save the file as a *Text (Tab delimited) (*.txt)* file with a meaningful name.

- Under **View Import/Export Results**

Action	Select **Validate** It is recommended that the file first be validated for errors prior to importing its contents. - **Import/Update**: To import and update the list of McGill Managed Catalog items from a tab delimited text file. - **Export**: To export the current list of McGill Managed Catalog Items on the Contract to a tab delimited text file. - **Validate**: To validate there are no errors with the tab delimited file prior to uploading its contents.
Description	Provide a description related to the action you are performing, ie Import, Export/Update or Validate.
File Name	Select the file saved in Excel using the **Choose File** button.
Submit	Click on this button to validate the file.

- The request is displayed as pending. Click on the **Refresh this Page** button until the information is updated.

Recent Activity   Refresh this Page

To see the latest status of the last five (5) requests submitted, click Refresh. If the submitted request is not visible, view all submitted requests by clicking the "Click here for additional requests..." link. To view the output file for a completed request, click the file name or the "Click to download..." link so the file can be viewed or saved.

Validate	Validate the import	Pending	Click to delete...
Request Date		8/5/2020 11:14 AM	

Click here for additional requests...

- If any errors (**Records with errors**) or warnings (**Records with warnings**) are found, click on the file name link to see the details.

Recent Activity   Refresh this Page

To see the latest status of the last five (5) requests submitted, click Refresh. If the submitted request is not visible, view all submitted requests by clicking the "Click here for additional requests..." link. To view the output file for a completed request, click the file name or the "Click to download..." link so the file can be viewed or saved.

Validate	Validate the import	Completed with Errors/Warnings	Click to delete...
Request Date		8/5/2020 11:14 AM	
Completion Date		8/5/2020 11:14 AM	
File		ContractItem_72753943.txt(1k) Click to download...	
Total records		4	
New records		0	
Existing records		0	
Deleted records		0	
Records validated/imported		0	
Records with warnings		0	
Records with errors		4	
		Click to import...	

- Correct any errors (and warnings if required) and validate the file once again following the same instructions.
  - Warnings may not need to be corrected. For example, there could be a warning stating that the category cannot be derived from the value of UNSPSC. Since categories are not required, this warning can be ignored.

- If no errors were found and any warnings can be ignored, then click on the **Click to import…** link.

- Click on **Ok**

- The request is displayed as pending. Click on the **Refresh this Page** button until the information is updated.

CCT Record Creation

- Once imported, the request status should be updated to **Completed**

- Click on **Manage McGill Catalog Items** to view the results

CCT Record Creation

2.7.3.3 Modifying McGill Managed Catalog Items one at a time

- Click Catalog Number that you wish to edit to open the **Contract McGill Managed Catalog Item** window.

- Make all the required changes and click on **Save**.

CCT Record Creation

2.7.3.4 Deleting one or more McGill Managed Catalog Items with the Remove Selected link.

- Select the McGill Managed Catalog Items to be removed and click on the **Remove Selected** link.

- Click **Remove** to confirm.

- The selected McGill Managed Catalog Items have been removed

2.7.3.5 Adding, updating and deleting multiple McGill Managed Catalog Items with an import

Note: Unlike the import file used with Products/SKUs when using hosted and punch out catalogs, an import of McGill Managed Catalog Items does not automatically overwrite the existing records. Instead the import can be used to add, modify and delete only those products included in the file.

The exporting feature can be used for easy editing of the file in Excel and re-importing of the contents of the file to update the McGill-Managed Catalog

- If you would rather work with the Excel file, then you can skip the next few steps on exporting the current values. If not, click on **View Import/Export Results** to open the Contract McGill Managed Catalog Items Import/Export Request.
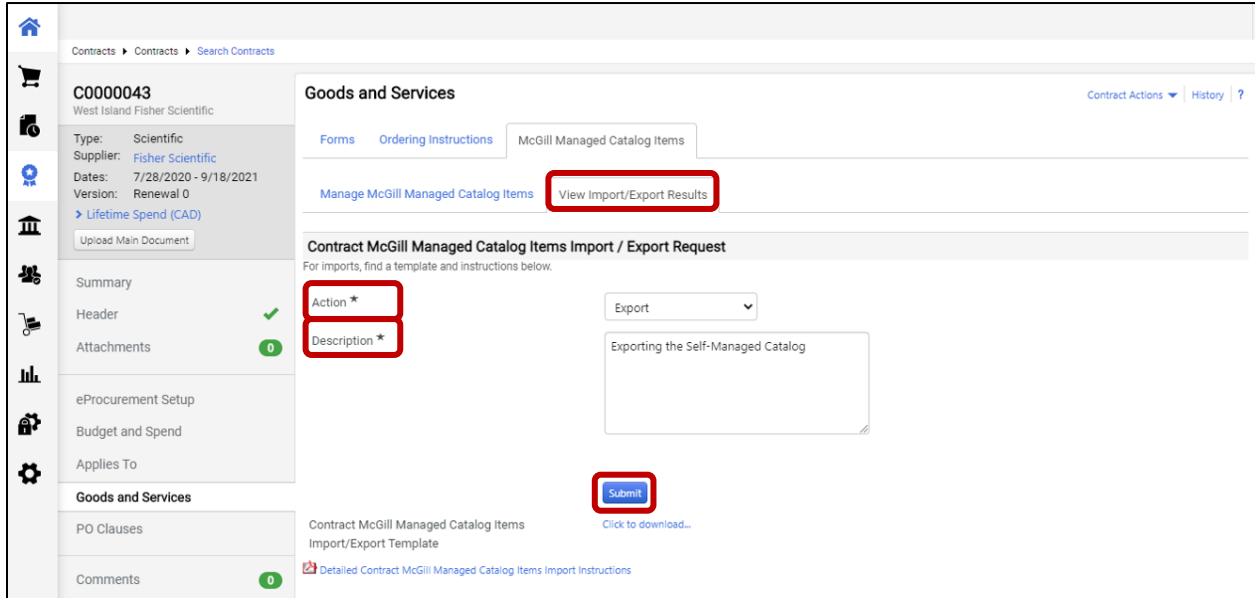
Action	Select **Export** from the dropdown list
Description	Provide a description related to the action you are performing.
Submit	Click on this button to export the file.

- The request is displayed as pending. Click on the **Refresh this Page** button until the information is updated.

- Download the file by clicking on the file name link.

- Please refer to the information under section *2.7.3.2 – "Importing multiple McGill Managed Catalog Items to* the Contract*"* to perform the following steps with the exported file. However, if you have more than 100 records, you will need to split the records into multiple files.
    - Open the downloaded file in Excel as a Delimited text file.
    - Make all required changes in the file (adding new records, editing existing records and deleting records).
    - Save the file.
    - Validate the file.
    - Import the file.

- The list of McGill Managed Catalog Items will be updated with the records from the import file.

2.8 PO Clauses page
- Leave as is, no changes required.

CCT Record Creation

2.9   Comments page

Note: This functionality can be used to create discussion threads within the Contract.
At this time, there should be at least one thread that includes the information on how the SKUs were defined.

Additional threads could include:
- Notes that could be used for continuous improvement with the Contracts.
- Questions that arise during the Contract's execution that the Contract offers no response for.
- Operational issues with the contractual obligations.
- Administrative issues.
- Changes and amendments to the Contract.
- "Email agreements" that should become clauses in the next Contract.
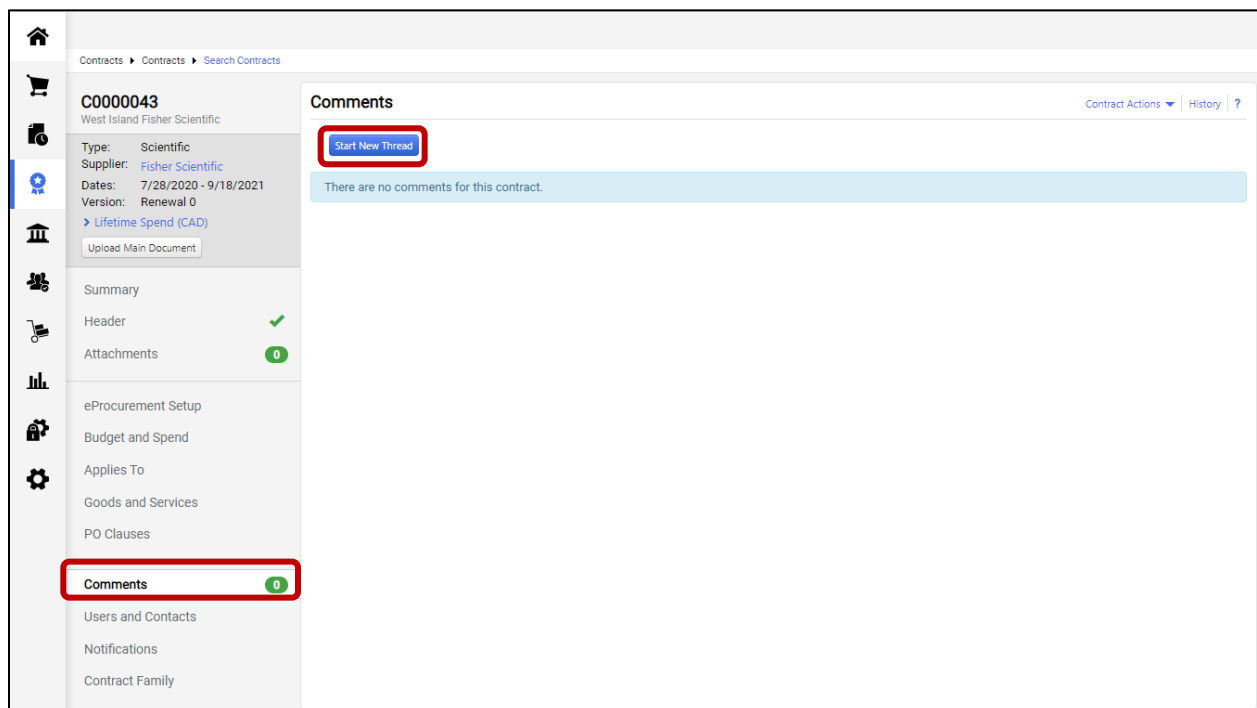
- To create a new thread, click on **Start New Thread** to open the **New Comment Window**.

CCT Record Creation

Subject	Enter a short description of the discussion thread
Message	Enter a more detailed message on the subject
Send Notification To	Optionally send a message to one or more users.
Save	Click **Save** to add the discussion thread

- Multiple threads can be added to the Contract and are sorted by most recent by default.
  - o Click on **Sort by** to change the order
  - o Click on **Reply to Thread** to add to a thread.

CCT Record Creation

2.10 Users and Contacts page

Note: Notifications related to this Contract can only be sent to the Contract Managers, Stakeholders and External Contacts configured on this page.

Notification settings are configured on the **Notifications** page.

2.10.1 Users and Contacts section

Note: Only individual users must be added as contacts (i.e. no Roles)

- Select the Users that you would like to assign as **Contract Managers** and **Stakeholders**.

Contract Managers	These Users will have full control of the Contract.
Invoice Approvers	Do not select. This Contact Type is <u>**NOT USED**</u> at this time.
Stakeholders	These Users will be able to view the Contract and receive notifications.

- Click on **Edit Users** to open the **Add Contract Users** window.

- Search for Users by typing their name in the **Individually by User** text box. If a required User is not listed, please contact the MMP Administrators.

CCT Record Creation

- Click on **Save Changes** to add the selected Users OR click on **Close** to discard the changes.
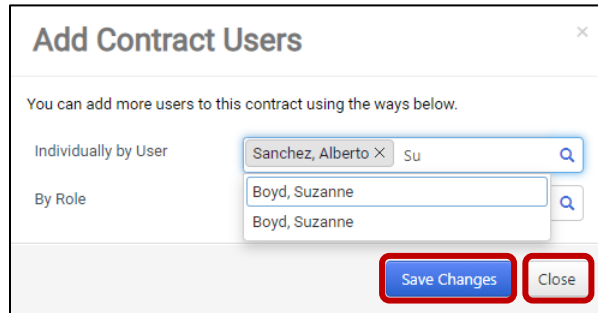
- Another option is to use the **User Search** window that can be opened by clicking the User **Search** icon.
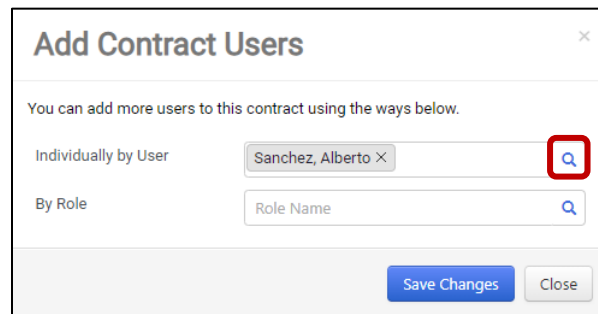
- On the **User Search** window, click on the **Select** buttons for each user to be added and/or the **Remove** buttons for each user to be removed. If a required User is not listed, please contact the MMP Administrators.

- Click on **Save Changes** to save the changes or **Close** to discard them.

CCT Record Creation

2.10.2 Visibility Controls section

- Select the visibility controls for **Users Who May Manage Other Contracts** and **All Other Users**.

Users Who May Manage Other Contracts	Select **Full** from the dropdown list. Allows other Contract Managers to have full visibility on this Contract.
All Other Users	Select **Partial** from the dropdown list. Hides portions of the Contract from other internal users, with Limited hiding the most.
Preview	Click on **Preview** to show how much of the Contract will be visible.

2.10.3 External Contacts section

- If you need to send notifications to external contacts, click on **Add Contacts** to open the **Add External Contact** window.
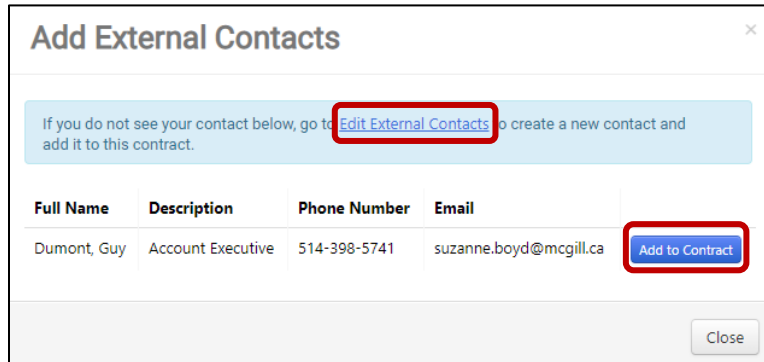
- Click on **Add to Contract** for every external contact you want to send notifications to.
- If an external contact does not appear in the list, you can add them by clicking on the **Edit External Contacts** link to open the **External Contacts** Page for the Supplier.

CCT Record Creation
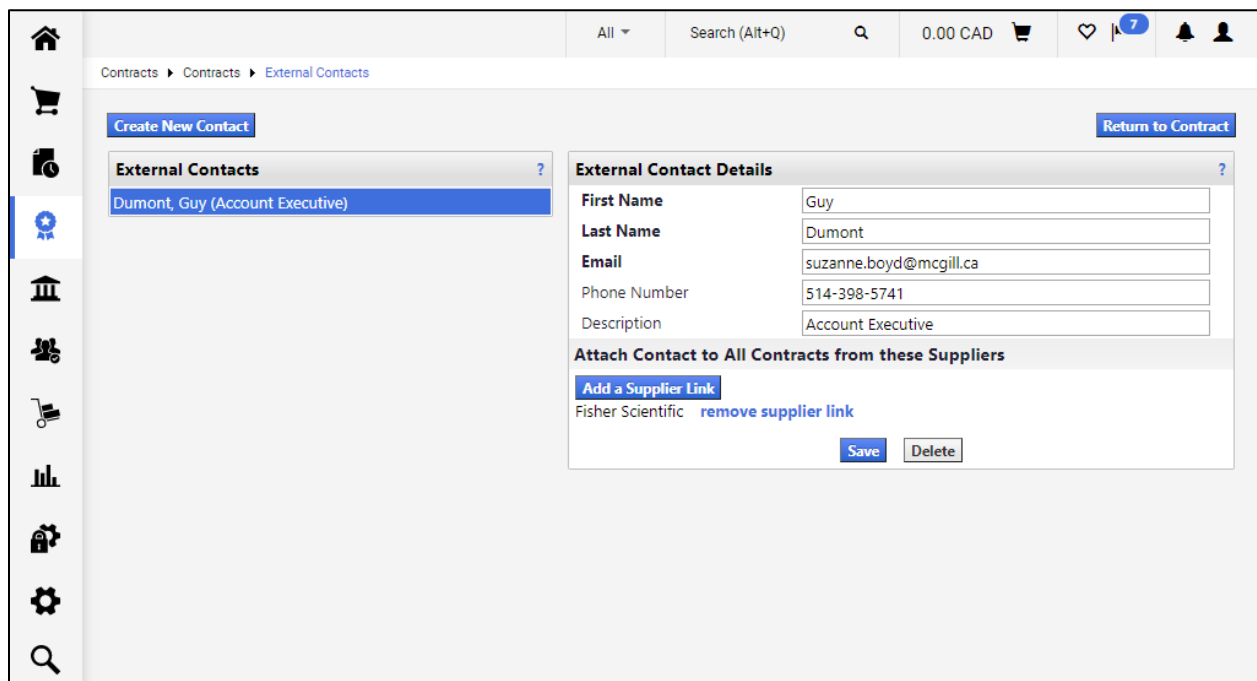
- Click on **Create New Contact** to add the new external contact details. Click on **Save** when done.
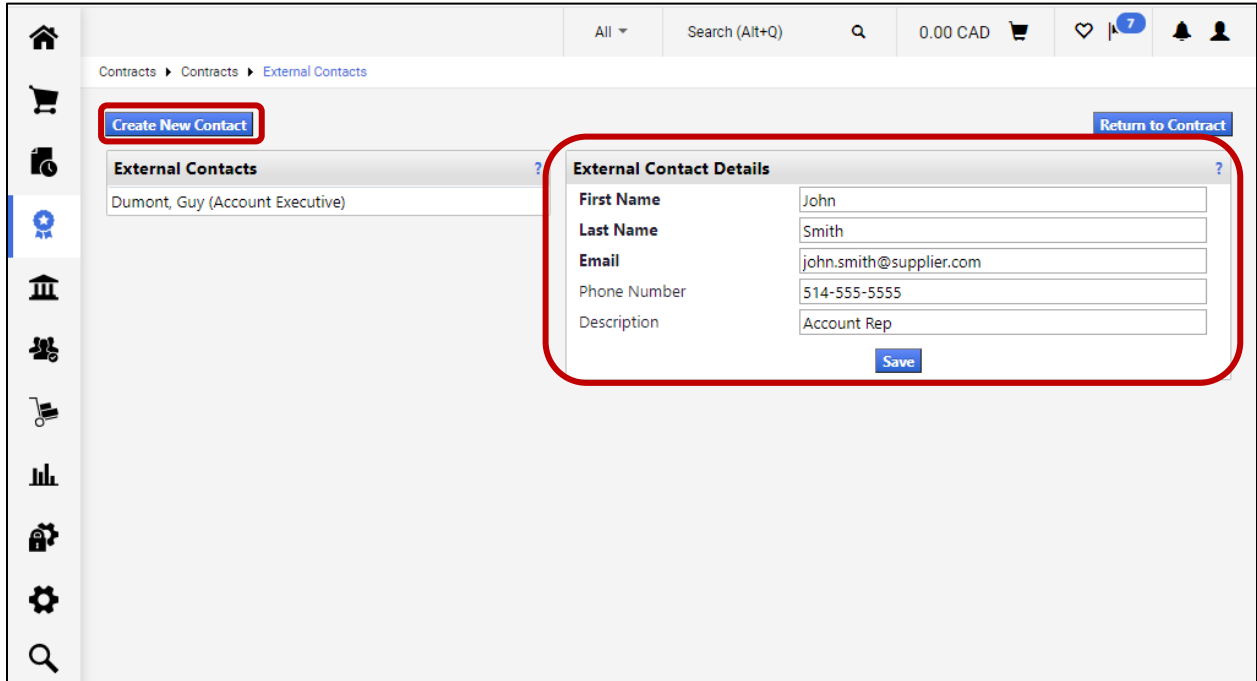
- Click on **Return to Contract**.

CCT Record Creation
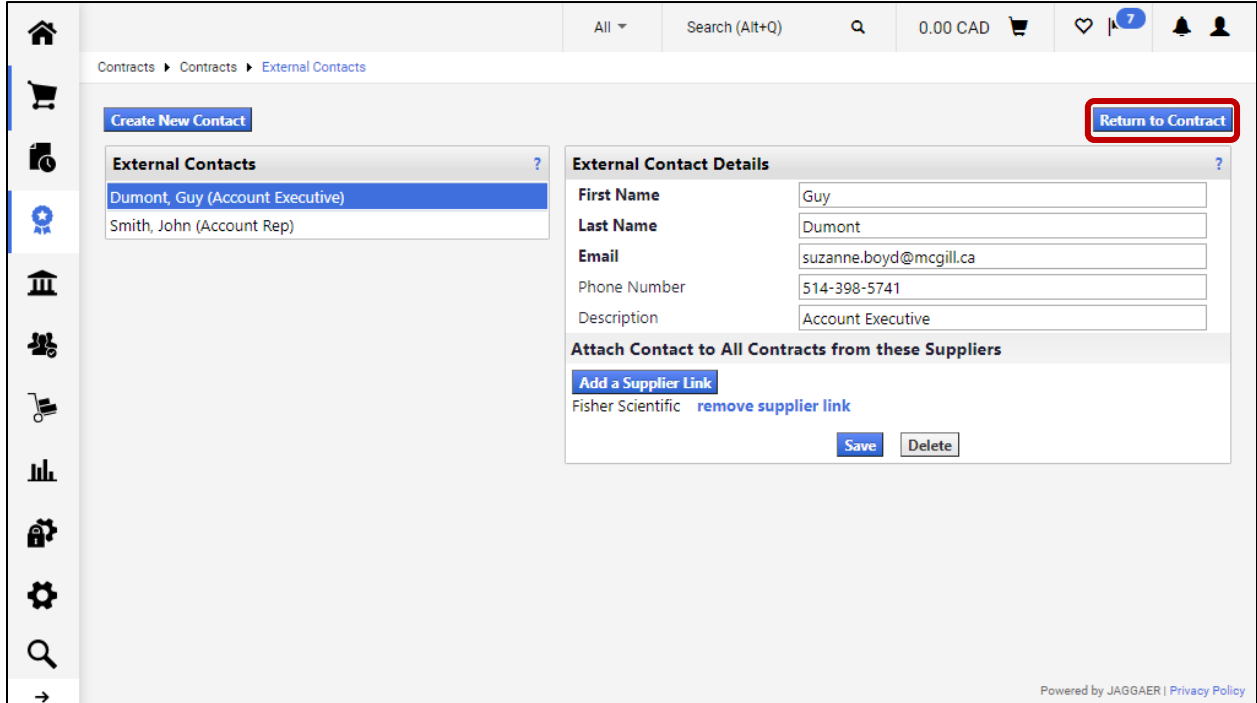
- To add the newly created external contact, click on **Add Contacts** to open **Add External Contact** window again.

- Click on **Add to Contract** for the newly created external contact and click on **Close**.

- The external contact has been added to the Contract.

CCT Record Creation

2.11 Notifications page

Note: Notifications related to this Contract can only be sent to the Contract Managers, Stakeholders and External Contacts that were configured on the **Users and Contacts** page.

2.11.1 Notifications section

Note: The Notifications used, and their settings will depend on the nature, complexity and terms of the Contract.

- Select the **Notification Types** and their recipients (**Contract Managers**, **Stakeholders** and **External Contacts**) based on your needs:

  o To send notifications for **Start Date – Advance Notice**, **End Date – Advance Notices** and **Renewal Date – Advance Notices**, you need to set the corresponding number of days under the **Advance Notice Settings**.
  o To send notifications for **Percentage Tiers** and **Amount Tiers**, you need to add the required spend tiers and spend types (PR, PO and Invoice) under the **Spend Tier Notification Settings**.
  o Notifications for **Budget Exceeded** and **Percentage Tiers** should only be used if a Budget amount was entered on the **Budget and Spend** page, following consultation with the MMP administrators.

CCT Record Creation

2.11.2 Advance Notice Settings section

-

Start Date	Required if **Start Date – Advance Notice** has been selected. Will send a notification the number of days prior to the **Start Date** (read "effective date") of the Contract. Only one advance notice is available
End Date	Required if **End Date – Advance Notices** has been selected. Will send a notification the number of days prior to the **End Date** of the Contract if one has been configured. Up to three advance notices are available
Renewal Date	Required if **Renewal Date – Advance Notices** has been selected. Will send a notification the number of days prior to the automatic **Renewal Date** of the Contract if it has been configured to auto-renew. Up to three advance notices are available

2.11.3 Spend Tier Notification Settings section

- If notifications for **Percentage Tiers** or **Amount Tiers** have been selected, click on **Add Notification Tier** to add a new tier level.

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- If notifications for **Percentage Tiers** have been selected, select **Percentage** from the **Tier Type** dropdown list and enter the **Tier Amount** (in percent) and **Description.**

- If notifications for **Amount Tiers** have been selected, select *Amount* from the **Tier Type** dropdown list and enter the **Tier Amount** (amount) and **Description.**

- Add as many notification tiers as required by clicking on **Add Notification Tier** for each one.
- Select the type(s) of spend (**PR spend**, **PO spend** and **Invoice spend**) that the notifications will be sent for. Note, the **Notification Tiers** will apply to all types selected.

2.12 Contract Family page

- Leave as is, no changes required.

3 Appendix

3.1 Search Suppliers

Notes: The Supplier Number found using the search can then be used to select the right Supplier for the Contract.

You may also want to check for both the English and French iterations of the Supplier's name as not all of them are entered in English.

- Go to **Suppliers Menu → Manage Suppliers → Search for a Supplier**
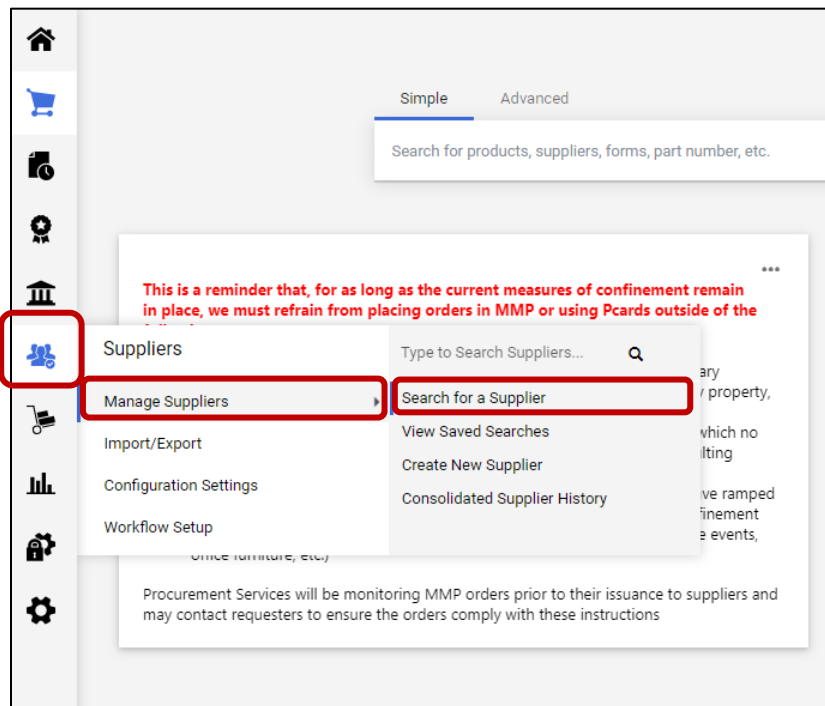
- If the **Simple Search** page is opened, click on **Advanced Search**.
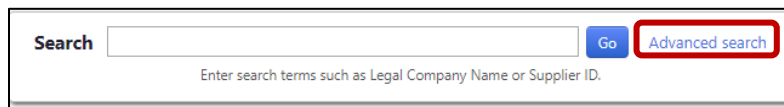
- Enter the name of the **Supplier**, select "Active" for **Shopping/AP Status** and click on **Search**.

- The list of Suppliers is returned, including the **Supplier Number** for each. Note in this example, the currency flags (US vs CAN) are displayed and would allow the Buyer to identify the right Supplier that matches the currency of the Contract.

- The **Supplier Number** for the required Supplier can then be used to select the correct Supplier for the Contract.