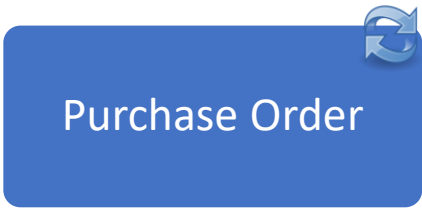


33 Legacy Contract Upload


Contracts may need to be loaded into BidBuy (and potentially established as a Master Blanket) for a variety of reasons. The most common are:

- Legacy Contracts established prior to BidBuy that will have ongoing activity, such as renewals or change orders.
- Contracts newly established outside of BidBuy that need to be entered in BidBuy.



Stage	Tab	Task	Who
PURCHASE ORDER			
Create Purchase Order	<input checked="" type="checkbox"/> Bid Buy Home Screen	<input checked="" type="checkbox"/> Add document. Click on the “+” sign to the right of the BidBuy logo <input checked="" type="checkbox"/> Purchase Order Select method to create new purchase order: Create a purchase order from scratch <input checked="" type="checkbox"/> PO Type of the New Purchase Order: Open Market or Blanket <input checked="" type="checkbox"/> Continue	Agency
	<input checked="" type="checkbox"/> General Tab	<input checked="" type="checkbox"/> Short Description: This should uniquely identify the procurement as this is a searchable field. <input checked="" type="checkbox"/> Type Code: Select the appropriate type code as this is a searchable field. <input checked="" type="checkbox"/> Is this a Small Business Set Aside Procurement?: Yes/No <input checked="" type="checkbox"/> Actual Contract Begin Date: Enter <input checked="" type="checkbox"/> Actual Contract End Date: Enter <input checked="" type="checkbox"/> Fiscal Year of Obligation: Enter <input checked="" type="checkbox"/> Original/ Old Contract/PO Number: <input checked="" type="checkbox"/> SAP Vendor Number: Enter <input checked="" type="checkbox"/> Full SAP Contract Value: Enter <input checked="" type="checkbox"/> Is there a BEP/VBP Participation Goal?: No <input checked="" type="checkbox"/> Award Amount: Enter <input checked="" type="checkbox"/> Save and Continue	Agency
	<input checked="" type="checkbox"/> Items Tab	Option 1: Add Open Market Item	Agency

		<ul style="list-style-type: none"> ✓🔒 Item Type: Normal or Narrative ✓🔒 Description: Complete specification of the item that the Agency is procuring (This is a searchable field). ✓🔒 Quantity ✓🔒 Estimated Cost ✓🔒 Unit of Measure ✓🔒 NIGP Code (Class and Item) ✓🔒 Save and Add New (if adding multiple line items) or Save and Exit <p>Option 2: Search Items:</p> <ul style="list-style-type: none"> ✓🔒 Advanced Search 🖨 Search Field Details ✓🔒 Find It ✓🔒 Select Items from Search Results ✓🔒 Select Add to Req (Exit or Continue) 				
	<ul style="list-style-type: none"> ✓🔒 Vendor Tab 	<ul style="list-style-type: none"> ✓🔒 Lookup and Add Vendor ✓🔒 Search for vendor ✓🔒 Select vendor <p>Note: If using the SAP Interface, check “Include Primary Vendor in the Vendor Distributor List” checkbox in the Distributors sub-tab</p> <ul style="list-style-type: none"> ✓🔒 Save and Continue 	Agency			
	<ul style="list-style-type: none"> ✓🔒 Accounting Tab (this tab will appear if not using a Blanket PO) <p>Note: Accounting Tab triggers the approval paths</p>	<ul style="list-style-type: none"> ✓🔒 Click on 🔍 to search Accounting Codes ✓🔒 Click “Find It” ✓🔒 Select “Not Applicable.” ✓🔒 Click “Save Based on Percentages” ✓🔒 Click “Rebuild for All Items” 	Agency			
	Control Tab (this tab will only appear when you are using a Blanket PO)	<ul style="list-style-type: none"> ✓🔒 Master Blanket/Contract Begin Date: Enter ✓🔒 Master Blanket/Contract End Date: Enter <p>If an Agency Specific Master Contract Select:</p> <ul style="list-style-type: none"> ✓🔒 If Cooperative Purchasing is not Allowed: Uncheck <ul style="list-style-type: none"> ✓🔒 Add New: Search and Identify Agency 🖨 Establish Control Thresholds ✓🔒 Save and Continue ✓🔒 If Cooperative Purchasing is Allowed: Check <ul style="list-style-type: none"> ✓🔒 Add New: Search and Add Other Agencies allowed to purchase from contract 🖨 Establish Control Thresholds ✓🔒 Save and Continue 	Agency			
	<ul style="list-style-type: none"> ✓🔒 Attachments 	<ul style="list-style-type: none"> ✓🔒 Add all Procurement File documents 👤 Verify that Show Vendor is <i>NOT checked</i> for any file or form that should <i>not</i> be accessible to the public. ✓🔒 Add Files <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; text-align: center;"><u>Document</u></td> <td style="width: 33%; text-align: center;"><u>Show to Vendor</u></td> <td style="width: 33%; text-align: center;"><u>Confidential</u></td> </tr> </table>	<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>	Agency
<u>Document</u>	<u>Show to Vendor</u>	<u>Confidential</u>				

		Fully Executed Contract	No	Yes	
		Any other documents to complete procurement file including communications	No	Yes	
	🔒 Notes	📄 As needed			Agency
	🔒 Summary	🖱 Review all Data 🔒 Submit for Approval 🔒 Continue			Agency
Conduct Approvals 					
Purchase Order					
Send PO	Home Screen	<u>Option 1:</u> 🔒 Select PO Hyperlink in “Recent Documents” <u>Option 2:</u> 🔒 PO’s Ready to Send → PO Hyperlink <u>Option 3:</u> 🔒 Advanced Search to find PO <u>Option 4:</u> 🔒 Click the hyperlink on the Bid			Agency
	🔒 Summary Tab	🔒 Select “Set to Printed Status” 🔒 Save and Continue			Agency