

# Linking a Contract to a draft cart or Requisition

## THESE ARE THE STEPS TO LINK A CART OR REQUISITION TO A CONTRACT.

**NOTE:** A Contract must be marked “*Active for Shopping*” by the Contract Manager to enable Contract Linking.

### LINKING FROM A CART:

1. Enter your cart as usual. Please refer to quick reference guides [here](#).
2. Once you have added items to your cart click **View My Cart**.
3. From within your shopping cart, click **choose contract**.

Shopping Cart 2021-03-10 requester10

1 Item

HURON CONSULTING SERVICES LLC · 1 Item · 1,000.00 USD

SUPPLIER DETAILS CHICAGO : PO BOX 71223, CHICAGO, IL 60694-1223 US

Item	Catalog No.	Unit Price	Quantity	Ext. Price
1 test		1,000.00	1 EA	1,000.00

ITEM DETAILS

Contract: choose contract...

4. Select from the directory of contracts associated with the chosen supplier and click **Save**.

Change Price

Select a Price and Contract Here

Step 1: Select a Price

1,000.00 USD (Current price)

Step 2: Select a Contract

No Contract

AGRMT-000670 (Consulting services with Huron)

SOW-000768 (B2P Project Team Production Support)

5. Continue with assigning the cart or the check out process.

### LINKING FROM REQUISITION:

1. Navigate to the requisition.
2. Scroll down to the line items section on the **Summary** tab and click the **pencil icon**.

Item	Catalog No.	Unit Price	Quantity	Ext. Price
1 test		1,000.00	1 EA	1,000.00

ITEM DETAILS

Contract: no value Internal Attachments Add

3. Click **Select price or contract**.

Edit Line 1: Item Details

1 test

Contract: Select price or contract...

4. Select from the directory of contracts associated with the chosen supplier and click **Save**.

Change Price

Select a Price and Contract Here

Step 1: Select a Price

1,000.00 USD (Current price)

Step 2: Select a Contract

No Contract

AGRMT-000670 (Consulting services with Huron)

SOW-000768 (B2P Project Team Production Support)

5. Continue with assigning the cart or the checkout process.


**Note:** The option to select a contract will only appear when a contract is “Active for Shopping”.

# Linking a Contract to a draft cart or Requisition

## NOTES AND FURTHER GUIDANCE:

- Once the requisition has been linked to a contract, the resulting purchase order will always have that connection.
- Invoice activity will be linked to the contract.
- Receipts will not be linked to a contract or have any contract identifier.
- The contract will need to be assigned on each line.
- Who is responsible to ensure the appropriate contract is linked to the PO?
  - The Requestor and Approver have a shared responsibility as well as the Contract Manager to communicate those expectations to the appropriate Shopper. If the Shopper/Requestor isn't certain, they should reach out to the Contract Manager.
- How do I change/update the contract that is linked to a PO?
  - Initiate a [Change Request](#) to edit the linked contract lines. Follow steps on previous page to link a contract.
- Can I link a contract and PO at any time?
  - Yes, via the change request process.
- What are the budget & spend contract impacts if the contract is not linked at PO setup?
  - The budget and spend will not be captured as Requisition Spend, but a change request can ensure that it gets included at a later date as part of PO and Invoice spend.
- What if I don't see the option to select a contract?
  - Please check to be sure a contract is setup and that it is "Active for Shopping". The option will only appear when a contract is "Active for Shopping".

## THE RESULTING PURCHASE ORDER WILL INCLUDE A REFERENCE TO THE CONTRACT NUMBER.

		<b>TEST PO-PLEASE DO NOT FULFILL</b>		<b>Harvard University Purchase Order</b>		
Purchase Order Date		PO/Reference No.		Revision No.		
Aug 19, 2020		80000002933		0		
<b>Contact Information</b>		Sample Requester101				
Owner Name		harvarduniversitytest@gmail.com				
Owner Phone						
Owner Email						
MA Sales Tax Exempt Cert Number: 342878208 Billing Inquiries: (617) 495-8500						
<b>Supplier Information</b>		<b>Ship To</b>		<b>Bill To</b>		
Supplier Name ABC MOVING SERVICES INC Address 33 INNER BELT ROAD SOMERVILLE, MA 02143-0000 US		ATTN Name/Department Mike Gleason Building/Room 1033 Massachusetts Ave Cambridge, MA 02138-0000 United States		Harvard University Accounts Payable P.O. Box 381588 Cambridge, MA 02238 United States		
<b>Note to Supplier</b>		<b>Additional Supplier Information</b>				
Note to Supplier Please contact Joe Smith @ (313) with any questions regarding the contract scope.		Customer Account Number Quote number Contract F.O.B. Payment Terms		SOW-000644 0% 0, Net 30		
Support Attachment File Names (if any)						
Supplier Quote Executed Contract						
<b>Line No.</b>	<b>Product Description</b>	<b>Catalog No.</b>	<b>Unit of Measure</b>	<b>Unit Price</b>	<b>Quantity</b>	<b>Ext. Price</b>
1 of 1	Testing Services		EA	10,000.00 USD	1 EA	10,000.00 USD
Total						10,000.00 USD
<b>Terms and Conditions</b>						<b>PO Comments</b>
The Parties to this Purchase Order hereby acknowledge and agree that the terms and conditions found at the following website: <a href="http://hwgs.harvard.edu/files/procurement-vendors/files/pro_purchaseorderconditions.pdf">http://hwgs.harvard.edu/files/procurement-vendors/files/pro_purchaseorderconditions.pdf</a> are hereby incorporated herein by reference.						There are no clauses associated with this Purchase Order.

# Attaching Documents vs. Linking Contracts

## Attaching a Document to a Requisition allows:

- Support Documentation to be delivered with the resulting Purchase Order Transmission
- Archiving of relevant support documentation with the transaction

**HARVARD UNIVERSITY**

MA Sales Tax Exempt Cert Number: 342876208  
Billing Inquiries: (617) 495-8500

TEST PO-PLEASE DO NOT FULFILL		Harvard University Purchase Order	
Purchase Order Date	PO/Reference No.	Revision No.	
Aug 19, 2020	80000002932	0	

Contact Information: Owner Name: Sample Requestor101, Owner Phone: harvarduniversitypo@gmail.com, Owner Email: harvarduniversitypo@gmail.com

Supplier Information		Ship To	Bill To
Supplier Name: ABC MOVING SERVICES INC	ATTN Name/Department: Mike Gleason	Harvard University	Harvard University
Address: 33 INNER BELT ROAD, SOMERVILLE, MA 02143 US	Building/Room: 103 Massachusetts Ave	P.O. Box: 387088	Accounts Payable
	Cambridge, MA 02138-0000	Cambridge, MA 02138	United States

Note to Supplier: Please contact Joe Smith @ (313) with any questions regarding the contract scope.

Support Attachment File Names (if any):

Supplier Quote: Executed Contract

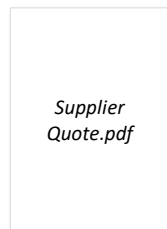
Customer Account Number: 0000000000

Additional Supplier Information: Order Number: SC99-000004, Payment Terms: 0% G, Net 30

Line No.	Product Description	Catalog No.	Unit of Measure	Unit Price	Quantity	Est. Price
1 of 1	Testing Services		EA	10,000.00 USD	1 EA	10,000.00 USD
Total						10,000.00 USD

Terms and Conditions: The Parties to this Purchase Order hereby acknowledge and agree that the terms and conditions found at the following website: [http://hqs.harvard.edu/files/instrument-vendors/files/po\\_purchaseorderconditions.pdf](http://hqs.harvard.edu/files/instrument-vendors/files/po_purchaseorderconditions.pdf) are hereby incorporated herein by reference.

PO Comments: There are no clauses associated with this Purchase Order.



## Linking a Contract to a Requisition allows:

- Tracking of Requisition, PO, and Invoice activity against the Contract
- Including Contract Number on the purchase order

**HARVARD UNIVERSITY**

MA Sales Tax Exempt Cert Number: 342876208  
Billing Inquiries: (617) 495-8500

TEST PO-PLEASE DO NOT FULFILL		Harvard University Purchase Order	
Purchase Order Date	PO/Reference No.	Revision No.	
Aug 19, 2020	80000002933	0	

Contact Information: Owner Name: Sample Requestor101, Owner Phone: harvarduniversitypo@gmail.com, Owner Email: harvarduniversitypo@gmail.com

Supplier Information		Ship To	Bill To
Supplier Name: ABC MOVING SERVICES INC	ATTN Name/Department: Mike Gleason	Harvard University	Harvard University
Address: 33 INNER BELT ROAD, SOMERVILLE, MA 02143-0000 US	Building/Room: 103 Massachusetts Ave	P.O. Box: 387088	Accounts Payable
	Cambridge, MA 02138-0000	Cambridge, MA 02138	United States

Note to Supplier: Please contact Joe Smith @ (313) with any questions regarding the contract scope.

Support Attachment File Names (if any):

Supplier Quote: Executed Contract

Customer Account Number: 0000000000

Additional Supplier Information: Order Number: SC99-000004, Payment Terms: 0% G, Net 30

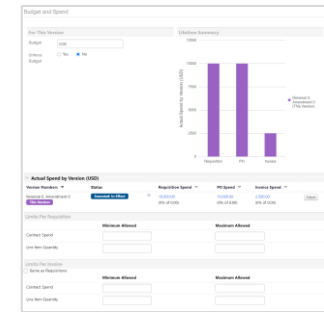
Line No.	Product Description	Catalog No.	Unit of Measure	Unit Price	Quantity	Est. Price
1 of 1	Testing Services		EA	10,000.00 USD	1 EA	10,000.00 USD
Total						10,000.00 USD

Terms and Conditions: The Parties to this Purchase Order hereby acknowledge and agree that the terms and conditions found at the following website: [http://hqs.harvard.edu/files/instrument-vendors/files/po\\_purchaseorderconditions.pdf](http://hqs.harvard.edu/files/instrument-vendors/files/po_purchaseorderconditions.pdf) are hereby incorporated herein by reference.

PO Comments: There are no clauses associated with this Purchase Order.



## Contract Spend Tracking



\*Attaching and Linking **can** be used together\*

# Attaching documents to a draft Requisition

The **External Notes and Attachments** section of the checkout process allows the user to provide support documentation that should be distributed with the purchase order.

1. Once you have added your items to your cart, click **Proceed to Checkout**.

Proceed To Checkout

Assign Cart

2. On the **Summary** tab, scroll down to the **External Notes and Attachments** section. Click **Add**.

Requisition ▾ : 3195750

Summary PO Preview Comments Attachments History

Internal Notes and Attachments	External Notes and Attachments
ICQ Support Documentation Attached <i>no value</i>	Note to all Suppliers <i>no value</i>
Vendor Justification Form Provided <i>no value</i>	Attachments for all suppliers <b>Add</b>
Debarment Form Provided (For Federal Contracts ≥ \$35K) <i>no value</i>	
Internal Attachments <b>Add</b>	

3. Select your preferred External Notes and Attachments to be included with the final purchase order. Click **Save Changes**.
4. Click **Submit Request**.

The resulting purchase order will now include a Note to the supplier and include the support attachments in the purchase order transmission. Example Below.

**HARVARD UNIVERSITY**

TEST PO-PLEASE DO NOT FULFILL		Harvard University Purchase Order	
Purchase Order Date	Aug 19, 2020	PO/Reference No.	80000002932
		Revision No.	0
<b>Contact Information</b>			
Owner Name	Sample Requester101		
Owner Phone			
Owner Email	harvarduniversitytest@gmail.com		

MA Sales Tax Exempt Cert Number: 342878208  
Billing Inquiries: (617) 495-8500

Supplier Information	Ship To	Bill To
Supplier Name: ABC MOVING SERVICES INC Address: 33 INNER BELT ROAD, SOMERVILLE, MA 02143 US	ATTN Name/Department: Mike Gleason Building/Room: 1033 Massachusetts Ave Cambridge, MA 02138-0000 United States	Harvard University Accounts Payable P.O. Box 381588 Cambridge, MA 02238 United States

Note to Supplier	Additional Supplier Information
Note to Supplier: Please contact Joe Smith @ (313) with any questions regarding the contract scope.	Customer Account Number: 1000000000
Support Attachment File Names (if any):	Contract number: no value
Supplier Quote: 1000000000	Destination: 0%
Executed Contract: 0%	Payment Terms: 0% 0, Net 30

Line No.	Item Description	Catalog No.	Unit of Measure	Unit Price	Quantity	Ext. Price
1 of 1	Testing Services		EA	10,000.00 USD	1 EA	10,000.00 USD

Total: 10,000.00 USD

Terms and Conditions	PO Comments
The Parties to this Purchase Order hereby acknowledge and agree that the terms and conditions found at the following website: <a href="http://hwp1.harvard.edu/files/procurement-vendors/files/pro_purchaseorderconditions.pdf">http://hwp1.harvard.edu/files/procurement-vendors/files/pro_purchaseorderconditions.pdf</a> are hereby incorporated herein by reference.	There are no clauses associated with this Purchase Order.