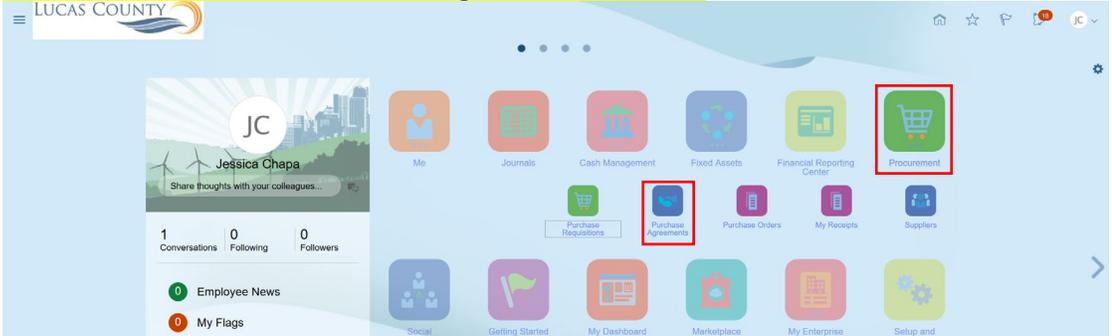
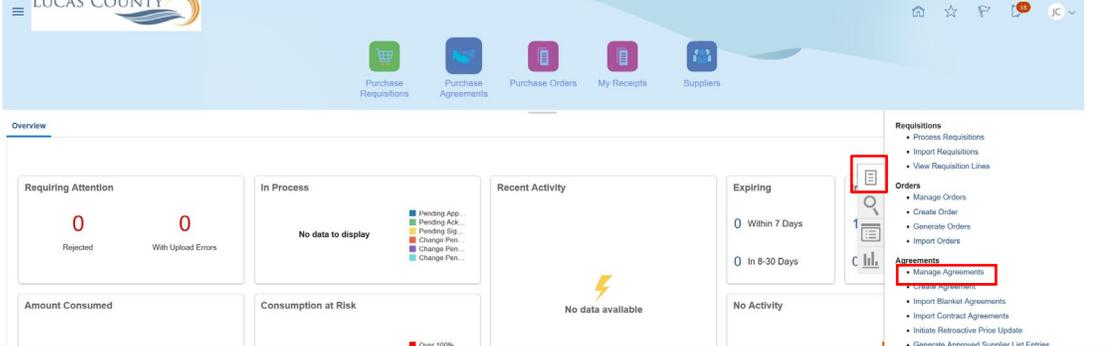
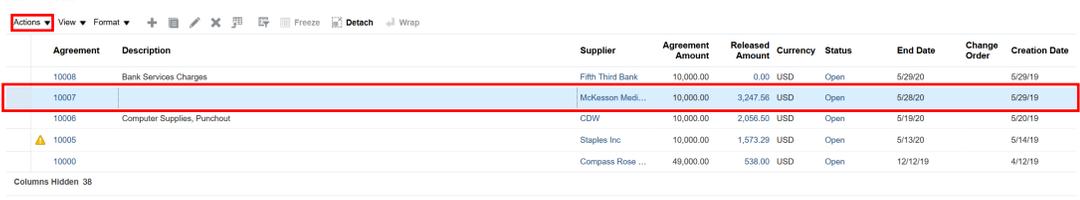
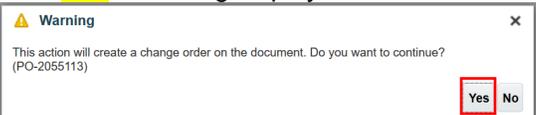
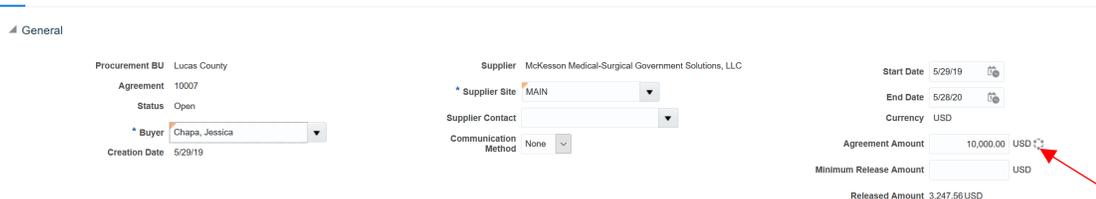


Agreements Inquiry

Audience: Supplier, Catalog Administrator, Procurement Agent

Purpose: Managing the supplier agreement life cycle enables all key stakeholders of the supplier agreement; the procurement agent, the catalog administrator, and the supplier to track and monitor the execution cycle of the agreement and initiate and manage changes to the agreement including cancellations. This job aid will assist you with an agreements inquiry.

Step	Action
1	<p>Log in. Home -> Procurement -> Purchase Agreements -> Tasks</p> 
2	<p>Click on Manage Agreements link.</p> 
3	<p>Use Basic or Advanced Search to narrow down your search. Type in the first few numbers of the agreement in the Agreement field or use the Search by keyword.</p> 

<p>4</p>	<p>Click on to select the Agreement line, and click the Actions dropdown. Select Edit.</p> 
<p>5</p>	<p>Click Yes if warning displays.</p> 
<p>6</p>	<p>Note: If a change order is created, you must enter a description of the change being made. Edit Change Order: 1</p> 
<p>7</p>	<p>Click on Agreement Amount Life Cycle icon.</p> 
<p>8</p>	<p>The Agreement Life Cycle window is displayed. Click the Done button.</p> 
<p>9</p>	<p>Click the Cancel button to return back to the Manage Agreements page.</p>
<p>10</p>	<p>Highlight the Agreement and Click on Released Amount link.</p>

Manage Agreements Done

Headers Lines

Search

Advanced Manage Watchlist Saved Search All My Agreements

Keywords: Procurement BU: Lucas County Supplier: Buyer: Rath, Michael Agreement: 1000 Status: Catalog Administrator Authoring Enabled: Include Closed and Expired Documents: No

Search Results

Agreement	Description	Supplier	Agreement Amount	Released Amount	Currency	Status	End Date	Change Order	Creation Date
10008	Bank Services Charges	Fifth Third Bank	10,000.00	0.00	USD	Open	5/29/20		5/29/19
10007	Computer Supplies, Punchout	McKesson Medi...	10,000.00	3,247.56	USD	Open	5/28/20		5/29/19
10006	Computer Supplies, Punchout	CDW	10,000.00	2,056.50	USD	Open	5/19/20		5/20/19
10005		Staples Inc	10,000.00	1,573.29	USD	Open	5/13/20		5/14/19
10000		Compass Rose ...	49,000.00	538.00	USD	Open	12/12/19		4/12/19

11 Click on **Life Cycle icon** for each **Order/Line/Schedule** combination.

Search Results

Order	Supplier	Line	Line Description	Schedule	Ordered Quantity	UOM	Price	Ordered Currency	Status	Ship-to Location	Requested Date	Promised Date	Life Cycle	Creation Date
10094	McKesson Medi...	1	First Aid Kit - Hard Case - Level 1	1	1	Each	69.24	69.24 USD	Open	Support Services	8/3/19			8/1/19

12 Click on the **Order Number** hyperlink to display the details of the PO.

Purchase Order: 10093

Main

General

Procurement BU: Lucas County Supplier: McKesson Medical-Surgical Government Solutions, LLC Ordered: 507.00 USD

Requisitioning BU: Lucas County Supplier Site: *MAIN Total Tax: 0.00 USD

Sold-to Legal Entity: Lucas County Supplier Contact: Total: 507.00 USD

Bill-to BU: Lucas County Communication Method: None Description: Requisition: 1216 Source Agreement: 10007

Order: 10093 Bill-to Location: Auditor - Accounting Supplier Order

Status: Open Ship-to Location: Support Services

Funds Status: Liquidated

Buyer: Jessica Chapa

Creation Date: 7/30/19

Terms Notes and Attachments

Required Acknowledgment: None Shipping Method: — Requires signature

Payment Terms: Immediate Freight Terms: None — Pay on receipt

FOB: Destination — Confirming order

Additional Information

Context Prompt

Lines Schedules Distributions

Line	Item	Description	Quantity	UOM	Price	Ordered	Status	Funds Status	Details
1		First Aid Chair covered in Non-porous c/w Eye Lamp	1	Each	507.00	507.00	USD	10093	

13 Click on **Requisition Number** link.

Requisition Lines Done

Advanced Search

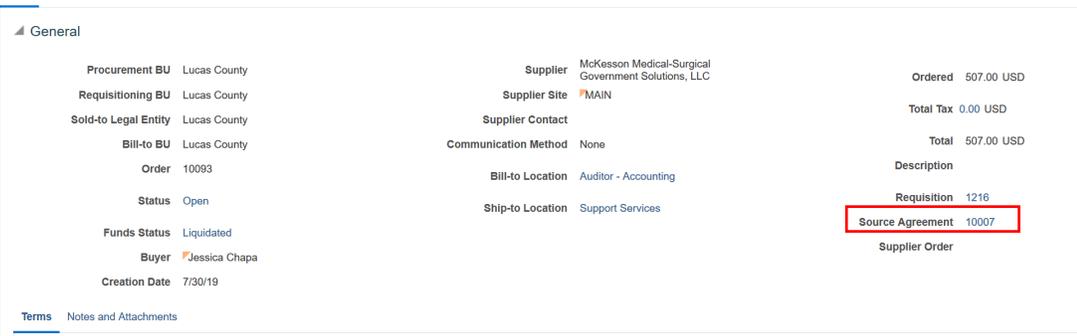
Basic Manage Watchlist Saved Search All My Requisition Lines

Procurement BU: Lucas County Requisitioning BU: Lucas County Requisition: Starts with: 1216 Buyer: Requester: Deliver-to Location: Line Description: Starts with: Category Name: Negotiation: Order: 10093

Search Results

Requisition	Line	Line Description	Requester	Quantity	UOM Name	Price	Amount	Currency	Order	Negotiation	Life Cycle
1216	1	First Aid Chair covered in Non-porous c/w Eye Lamp	Chapa, Jessica	1	Each	507.00	507.00	USD	10093		

14 Click the **Done** button.

15	<p>Click Source Agreement link to review Agreement Lines if applicable (Blanket).</p>  <p>The screenshot shows a procurement system interface with the following details:</p> <ul style="list-style-type: none"> General <ul style="list-style-type: none"> Procurement BU: Lucas County Requisitioning BU: Lucas County Sold-to Legal Entity: Lucas County Bill-to BU: Lucas County Order: 10093 Status: Open Funds Status: Liquidated Buyer: Jessica Chapa Creation Date: 7/30/19 Supplier: McKesson Medical-Surgical Government Solutions, LLC Supplier Site: MAIN Supplier Contact Communication Method: None Bill-to Location: Auditor - Accounting Ship-to Location: Support Services Ordered: 507.00 USD Total Tax: 0.00 USD Total: 507.00 USD Description Requisition: 1216 Source Agreement: 10007 (highlighted in red) Supplier Order
16	Click on Notes and Attachments . Review any notes or attachments.
17	Click on Actions -> View Document History . Drill down if applicable. Click Done .
18	Click the Done button.
19	Click on Actions -> View Change History . Drill down if applicable.
20	Click the Done button.
21	Click on Actions -> View Revision History . Drill down if applicable.
22	Click the Done button.
23	Click the Done button.