

Create Purchase Order from Requisition, Add Special Terms and Utilize DocuSign for Contract Execution

Audience: Purchasing

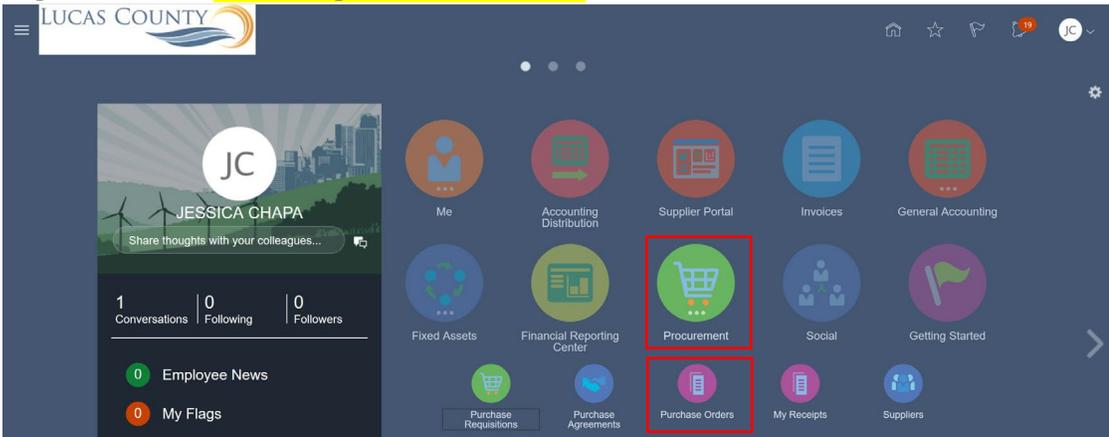
Purpose: You can create contract terms templates in the Contract Terms Library to insert appropriate terms and conditions into contracts during contract authoring. You can apply the templates manually while authoring contracts or the application can apply the templates automatically using defaulting rules you set up.

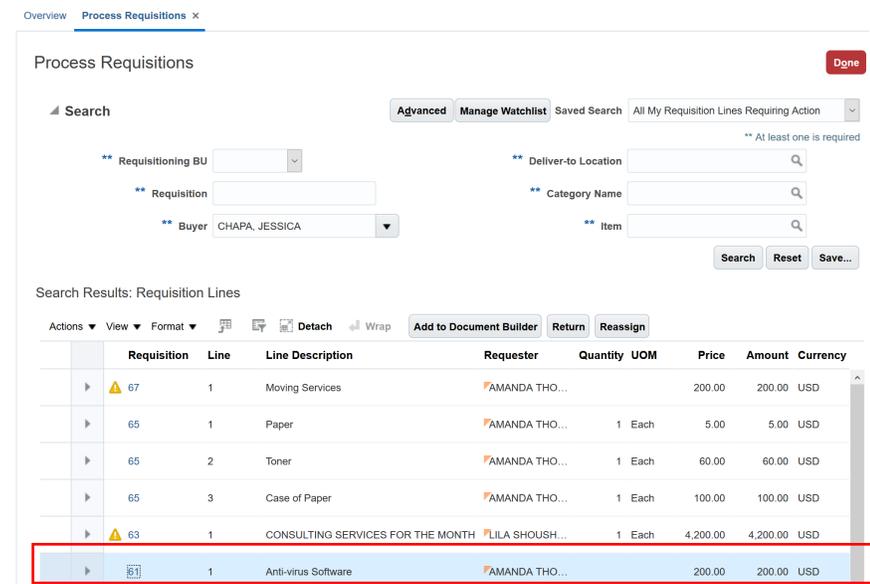
After applying the Contract to a Purchase Order, you can utilize DocuSign to obtain necessary signatures.

Contract terms templates:

- Contain sections and clauses from the Contract Terms Library.
- Are created in the Contract Terms Library separately. You cannot create them directly from an existing contract.
- Are specific to one business unit.
- Apply to enterprise contracts of the contract types you specify in the template.
- Are specific to either sell-intent or buy-intent contracts.
- Can default contract terms directly on purchase orders and sourcing documents, and on enterprise contracts. For these documents, contract terms templates can also include contract deliverables which can be used to track the completion of contractual tasks in the contract.

This job aid will assist with creating a purchase order from a requisition, adding special terms and utilize DocuSign for contract execution.

Step	Action
1	<p>Log into Oracle. Home Page -> Procurement.</p> 

2	Click the Procurement button.																																																															
3	Click the Purchase Orders button.																																																															
4	<p>Click the Tasks icon.</p>  <p>Requisitions</p> <ul style="list-style-type: none"> • Process Requisitions • Import Requisitions • View Requisition Lines <p>Orders</p> <ul style="list-style-type: none"> • Manage Orders 																																																															
5	Click the Process Requisitions link.																																																															
6	<p>Highlight and select a requisition for processing.</p>  <p>Overview Process Requisitions x</p> <p>Process Requisitions Done</p> <p>Search Advanced Manage Watchlist Saved Search All My Requisition Lines Requiring Action</p> <p>** Requisitioning BU <input type="text"/> ** Deliver-to Location <input type="text"/></p> <p>** Requisition <input type="text"/> ** Category Name <input type="text"/></p> <p>** Buyer CHAPA, JESSICA <input type="text"/> ** Item <input type="text"/></p> <p>Search Reset Save...</p> <p>Search Results: Requisition Lines</p> <p>Actions <input type="button" value="View"/> <input type="button" value="Format"/> <input type="button" value="Detach"/> <input type="button" value="Wrap"/> <input type="button" value="Add to Document Builder"/> <input type="button" value="Return"/> <input type="button" value="Reassign"/></p> <table border="1"> <thead> <tr> <th>Requisition</th> <th>Line</th> <th>Line Description</th> <th>Requester</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Amount</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td>67</td> <td>1</td> <td>Moving Services</td> <td>AMANDA THO...</td> <td></td> <td></td> <td>200.00</td> <td>200.00</td> <td>USD</td> </tr> <tr> <td>65</td> <td>1</td> <td>Paper</td> <td>AMANDA THO...</td> <td>1</td> <td>Each</td> <td>5.00</td> <td>5.00</td> <td>USD</td> </tr> <tr> <td>65</td> <td>2</td> <td>Toner</td> <td>AMANDA THO...</td> <td>1</td> <td>Each</td> <td>60.00</td> <td>60.00</td> <td>USD</td> </tr> <tr> <td>65</td> <td>3</td> <td>Case of Paper</td> <td>AMANDA THO...</td> <td>1</td> <td>Each</td> <td>100.00</td> <td>100.00</td> <td>USD</td> </tr> <tr> <td>63</td> <td>1</td> <td>CONSULTING SERVICES FOR THE MONTH</td> <td>LILA SHOUSH...</td> <td>1</td> <td>Each</td> <td>4,200.00</td> <td>4,200.00</td> <td>USD</td> </tr> <tr> <td>61</td> <td>1</td> <td>Anti-virus Software</td> <td>AMANDA THO...</td> <td></td> <td></td> <td>200.00</td> <td>200.00</td> <td>USD</td> </tr> </tbody> </table>	Requisition	Line	Line Description	Requester	Quantity	UOM	Price	Amount	Currency	67	1	Moving Services	AMANDA THO...			200.00	200.00	USD	65	1	Paper	AMANDA THO...	1	Each	5.00	5.00	USD	65	2	Toner	AMANDA THO...	1	Each	60.00	60.00	USD	65	3	Case of Paper	AMANDA THO...	1	Each	100.00	100.00	USD	63	1	CONSULTING SERVICES FOR THE MONTH	LILA SHOUSH...	1	Each	4,200.00	4,200.00	USD	61	1	Anti-virus Software	AMANDA THO...			200.00	200.00	USD
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7	<p>Click the Add to Document Builder button.</p>  <p>Add to Document Builder <input type="button" value="Return"/> <input type="button" value="Reassign"/></p>																																																															
8	Click in the Supplier field.																																																															
9	Enter the Supplier into the Supplier field.																																																															
10	Select Supplier from the list.																																																															

Search and Select: Supplier x

Search Advanced

** At least one is required

** Supplier

** Supplier Number

** Alternate Name

Search Reset

Supplier	Supplier Number	D-U-N-S Number	Alternate Name
CDW Government	100146		
CDW-G Government, Inc.	100145		
CDWG, INC.	100147		

OK Cancel

11 Click the **OK** button.

12 Click the **Create** button.

Document Builder

Requisitioning BU
Lucas County

Sold-to Legal Entity
Lucas County

Type
New Order

Source Agreement

Style
Purchase Order

Supplier
CDW-G Government, Inc.

Supplier Site
MAIN

Currency
USD

Your Document Builder contains 1 lines.

Recently Added Lines

Anti-virus Software 200.00 USD
Total 200.00 USD

Edit **Create** Clear

13 Click the **OK** button.

Information x

The document (Purchase Order) 26 was created.

OK

14 Click in the **Description** field.

Edit Document (Purchase Order): 26 ★

Check Funds Manage Approvals View PDF Actions Save Submit Cancel

Main Contract Terms

General

Procurement BU Lucas County
 Requisitioning BU Lucas County
 Sold-to Legal Entity Lucas County
 Bill-to BU Lucas County
 Order 26
 Status Incomplete
 Funds Status
 Buyer CHAPA, JESSICA
 Creation Date 8/12/19

Supplier CDW-G Government, Inc.
 Supplier Site MAIN
 Supplier Contact
 Communication Method None
 Bill-to Location Auditor - Accounting
 Default Ship-to Location Support Services

Currency USD
 Ordered 200.00 USD
 Total Tax 0.00 USD
 Total 200.00 USD

Procurement Card
 Description
 Requisition 61
 Agreement

Terms Notes and Attachments

Required Acknowledgment None
 Acknowledge Within Days
 Payment Terms Immediate

Shipping Method
 Freight Terms None
 FOB Destination

Requires signature
 Pay on receipt
 Confirming order

Additional Information

15 Enter a description for the Purchase Order into the **Description** field.

16 Click the **Requires Signature** checkbox.

Edit Document (Purchase Order): 190495 ★

Check Funds Manage Approvals View PDF Actions Save Submit Cancel

Main Contract Terms

General

Procurement BU Lucas County
 Requisitioning BU Lucas County
 Sold-to Legal Entity Lucas County
 Bill-to BU 190495
 Order 190495
 Status Incomplete
 Funds Status
 Buyer Rath, Michael
 Creation Date 11-25-2019

Supplier
 Supplier Site
 Supplier Contact
 Communication Method None
 Bill-to Location
 Default Ship-to Location Suppt Svcs - Purchasing

Currency USD
 Ordered 10.00 USD
 Total Tax 0.00 USD
 Total 10.00 USD

Procurement Card
 Description
 Requisition 1198
 Agreement

Terms Notes and Attachments

Required Acknowledgment None
 Acknowledge Within Days
 Payment Terms Immediate

Shipping Method
 Freight Terms None
 FOB Destination

Requires signature
 Pay on receipt
 Confirming order

Additional Information

17 Click **Contract Terms** tab.

Main Contract Terms

General

Procurement BU Lucas County
 Requisitioning BU Lucas County
 Sold-to Legal Entity Lucas County
 Bill-to BU Lucas County
 Order 26
 Status Incomplete

Supplier CDW-G Government, Inc.
 Supplier Site MAIN
 Supplier Contact
 Communication Method None
 Bill-to Location Auditor - Accounting

18 Select **Add Contract Terms**.

Edit Document (Purchase Order): 26 Check Funds Manage Approvals View PDF Actions Save Submit Cancel

Main Contract Terms

There are no contract terms. Add Contract Terms

19 Select **Authoring Party = Internal.**
 Contract **Source = Terms Template.**

Add Contract Terms ✕

* **Authoring Party** Internal ▼

* **Contract Source** Terms Template ▼

* **Contract Terms Template** Services Agreement +

OK Cancel

20 Search and select **Contract Terms Template = Services Agreement.**

Search and Select: Contract Terms Template ✕

Search Name ▼ serv 🔍

View ▼ Format ▼ 🧊 Freeze ↶ Wrap

Name	Type	Description	Instructions	Expert Enabled	Language	Preview
Services Agr...	Structured	Purchasing 201...		✔		

OK Cancel

21 Select **OK.**

22 Additional Contract Terms may be added by selecting the **+** icon.

23 From the **Terms Actions** Drop Down List, Select **Run Contract Expert.**

Overview Process Requisitions x Edit Document (Purchase Order): 190495 x

Edit Document (Purchase Order): 190495 Check Funds Manage Approvals View PDF Actions Save Submit Cancel

Main Contract Terms

Authoring Party Internal Don't print contract terms amendments

Contract Source Terms Template

Contract Terms Template Services Agreement

Classes Deliverables Documents

Actions View + ✂ ✕

Contract Expert Last Run: 11-29-2019 12:21 PM 🔍 Pending Variables: 10 Nonstandard Clauses: 0

THIS AGREEMENT, made the _____ of _____ in Toledo, Lucas County, Ohio, by and between the Board of County Commissioners, Lucas County, Ohio, hereinafter called "County" and _____ hereinafter called "Service Provider",

WHEREAS, the County and the service provider mutually desire to contract with each other for the purpose of _____

Now, Therefore, for and in consideration of the mutual promises, covenants and agreements hereinafter set forth, the parties to this Agreement, with intent to be legally bound, agree as follows:

ARTICLE ONE: BID SPECIFICATIONS / SCOPE OF WORK

The "Service Provider" agrees to provide services for _____ as addressed in the specifications for _____ and incorporated herein as Exhibit B.

ARTICLE TWO: SCHEDULE OF PAYMENTS

Terms Actions

Edit Variable Values

Run Contract Expert

Validate Contract Terms

Download Contract

Download Add-in for Microsoft Word

Upload Contract

Lock Contract Terms

Review Contract Deviations

Check for Clause Updates

Change Contract Source

Remove Contract Terms

24 Enter Appropriate Values in the Values column.

Run Contract Expert

1 — 2 — 3
Enter Variable Values Answer Questions Review Suggested Clauses

Run Contract Expert: Enter Variable Values

View Format Freeze Wrap View All variables

Name	Description	Value	Clauses
Agreement D...	Agreement Day	2019	
Agreement E...	Agreement End Date	11-25-2020	
Agreement...	Agreement Month	November	
Agreement P...	Agreement Purpose	Purchase of ERP	
Agreement Y...	Agreement Year	2019	
Invoice Atten...	Invoice Attention	Duth Ashford	

Back Next Save and Close Finish Cancel

Select Next.

25 Select Finish.

Run Contract Expert

1 — 2 — 3
Enter Variable Values Answer Questions Review Suggested Clauses

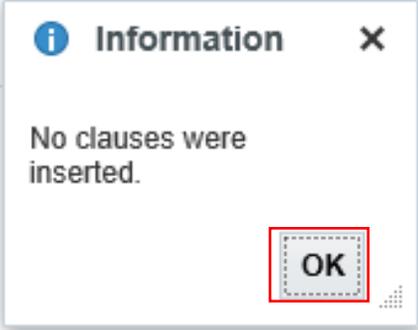
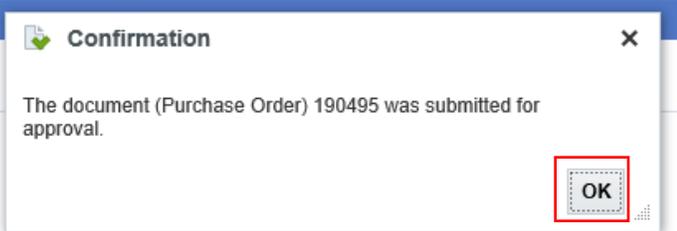
Run Contract Expert: Review Suggested Clauses

View Format Freeze Wrap

Insert into document	Clause Title	Description	Section	Clause Details
No data to display.				

Back Next Save and Close Finish Cancel

26 Select OK.

	
27	<p>Click the View PDF button.</p>  <p>Open PDF and Review Contract Document.</p>
28	<p>Click the Submit button to complete the process.</p> 
29	<p>Click the OK button.</p> 
30	<p>Click on Manage Orders from the Taskbar.</p> 
31	<p>Query the Purchase Order which was submitted.</p>

Manage Orders

Search

Search Results

Order	Description	Supplier	Ordered	Currency	Status	Life Cycle	Change Order	Creation Date
190495	Compassion Health Toled...	Compassion He...	10.00	USD	Pending Signat...			11-25-2019

32 Click on the **Purchase Order Number** link and the **Purchase Order** page will display.

Purchase Order: 190495

General

Procurement BU	Lucas County	Supplier	Compassion Health Toledo	Ordered	10.00 USD
Requisitioning BU	Lucas County	Supplier Site	MAIN	Total Tax	0.00 USD
Sold to Legal Entity	Lucas County	Supplier Contact		Total	10.00 USD
Bill to BU	Lucas County	Communication Method	None	Description	
Order	190495	Bill to Location	Auditor - Accounting	Requisition	1108
Status	Pending Signature Preparation	Ship to Location	Suppl Svcs - Purchasing	Source Agreement	
Funds Status	Reserved			Supplier Order	
Buyer	Michael Rath				
Creation Date	11-25-2019				

Required Acknowledgment: None
Payment Terms: Immediate
Shipping Method: None
Freight Terms: None
FOB: Destination

✓ Requires signature
Pay on receipt

33 From the Actions Menu List of Values select **Prepare for Signature**.

View PDF Actions Done

- Edit
- Delete
- Acknowledge
- Prepare for Signature**
- Communicate
- Cancel Document
- Close
- Reopen
- Hold
- Freeze
- Withdraw
- View Document History
- View Change History
- View Revision History

34 The DocuSign **Prepare for Signature** screen will open

Prepare for Signature

Sign Purchase Order 190495.

Michael Rath

Purchase Order #	190495
Order Date	11-25-2019
Change Order	0
Change Order Date	11-25-2019
Revision	0
Ordered	\$10.00 USD
Buyer Name	Michael Rath
Buyer Email	michael.rath@sierra-cedar.com

Purchase Order 190495
LUCAS COUNTY
Tax Exempt ID: 34-6400806

Sold To: Lucas County
1 Government Center
Toledo, Oh 43604

Supplier: Compassion Health Toledo
1638 Broadway St
Toledo, Oh 43609-3240

Table Tools Michael Rath

35 **Select the Recipients Drop Down List** and select **Edit Recipients.**

Prepare for Signature

Sign Purchase Order 190495.

Michael.Rath

Michael.Rath

Edit Recipients

Signature

36 **Add all Recipients and set Signing Order.**

Edit Recipients

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

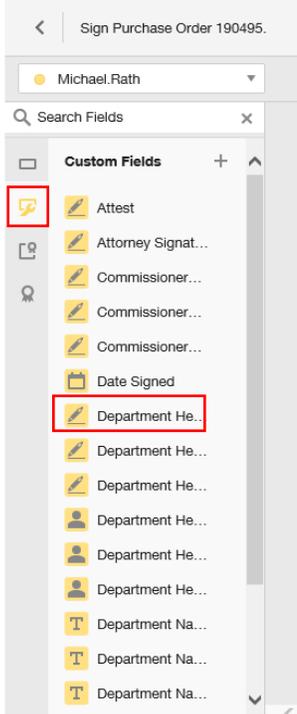
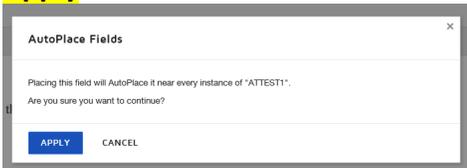
Import a bulk list. Send copies of this envelope to many people at once.

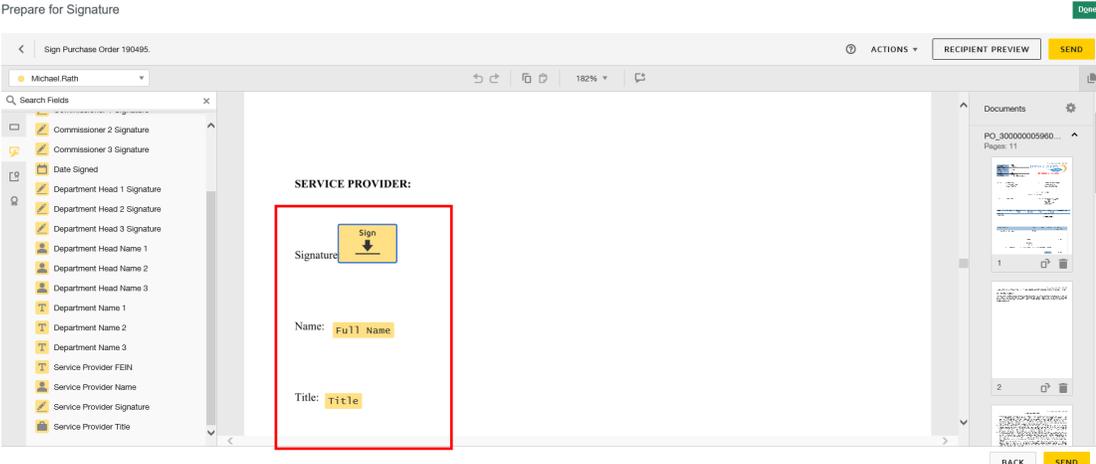
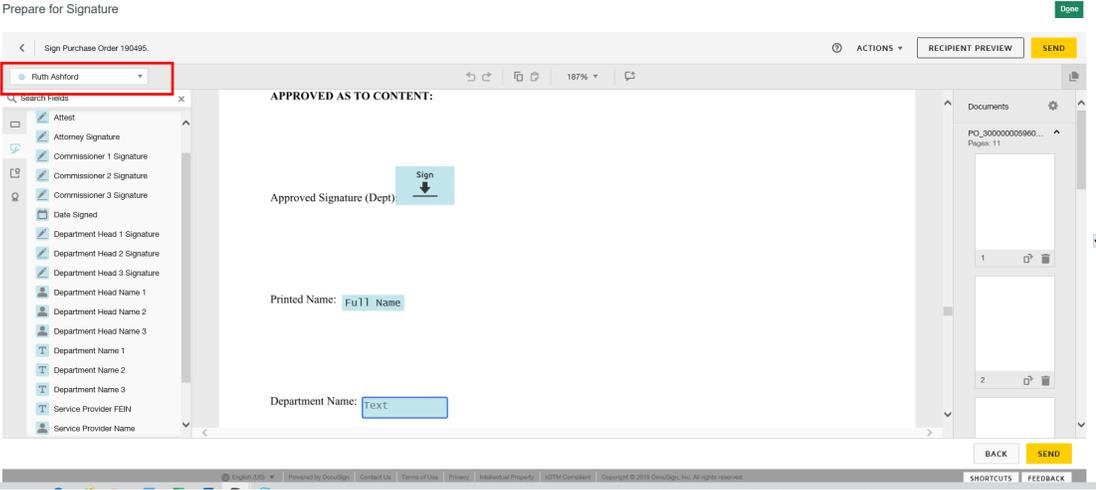
Set signing order

1	<p>Name *</p> <p>Michael.Rath</p> <p>Email *</p> <p>michael.rath@sierra-cedar.com</p>	<p>NEEDS TO SIGN MORE</p>
2	<p>Name *</p> <p>Ruth Ashford</p> <p>Email *</p> <p>rashford@co.lucas.oh.us</p>	<p>NEEDS TO SIGN MORE</p>

ADD RECIPIENT

DONE

	<p>When done Select Done.</p>
<p>37</p>	<p>Select Custom Fields to be added to the Contract Document</p> <p>Prepare for Signature</p>  <p>The screenshot shows a mobile application interface for signing a purchase order. At the top, it says 'Sign Purchase Order 190495'. Below that, the user 'Michael.Rath' is selected. A search bar for fields is present. A list of 'Custom Fields' is shown, including 'Attest', 'Attorney Signat...', 'Commissioner...', 'Date Signed', and 'Department He...'. The 'Attest' field and the first 'Department He...' field are highlighted with red boxes.</p>
<p>38</p>	<p>Select the first Recipient and Drag Fields associated to the recipient to the Contract.</p>
<p>39</p>	<p>As the Custom Fields are applied to the Contract they will be auto placed, select Apply for each field.</p>  <p>The screenshot shows a dialog box titled 'AutoPlace Fields'. It contains the text: 'Placing this field will AutoPlace it near every instance of "ATTEST". Are you sure you want to continue?'. At the bottom, there are two buttons: 'APPLY' and 'CANCEL'.</p>
<p>40</p>	<p>Tags will be placed in the appropriate area of the document based on the Custom Tags applied.</p>

	
<p>41</p>	<p>Select the next Recipient from the List and Drag appropriate Custom Fields</p> 
<p>42</p>	<p>Continue adding Recipients and Custom Fields as needed.</p>
<p>43</p>	<p>When all Recipients and Custom Fields have been added, select Send. The document will be sent for signature.</p>
<p>44</p>	<p>Upon execution by all parties the document will be returned to Oracle in an Open status. If the Purchase Order communication method is set to Email, the final executed Purchase Order and Contract will be email to the supplier form Oracle.</p>