

**OCA TC 96104 CopySmart Department Checklist**

**PeopleSoft SUPPLIER CONTRACT Instructions:**

- OCA has created "model" contracts for each CopySmart supplier (Canon, Ricoh, Xerox). **For consistency, use the "Copy From Contract" function to use these "model" contracts to pre-populate their own contracts.**

SUPPLIER	MODEL CONTRACT ID TO COPY FROM
CANON	1000013649
RICOH	1000013651
XEROX	1000013650

**0. START END DATES:** Enter Begin and Expire Dates for the lease agreement. *You can not combine machines with different start and end dates into a single PeopleSoft contract.*

**1- DESCRIPTION:** All CopySmart supplier contracts will identify the Term Contract # and supplier (e.g. 96104C\_DESCRIPTION).

**2- MASTER CONTRACT ID:**

Use the magnifying glass icon to select the applicable ID for the Master Contract field based on supplier:

CANON:	0000000002
RICOH:	0000000003
XEROX:	0000000004

**3- CONTRACT TYPE:** Use "PCTCC" contract type.

**4- DEPARTMENT:** Enter YOUR Department.

**5- PURCHASING AUTHORITY:** Use "TC" purchasing authority.

**6- LINE DESCRIPTION:**

- Each line item corresponds to only one CopySmart quote/lease.  
 - Enter "Machine 1", "Machine 2", etc.....*The details for each machine will be pasted in as per item 7 below.*

**7. LINE COMMENTS:**

-For each Line (i.e. individual copier lease), copy cells Q4:Q25 from the corresponding Quote.

-Check each checkbox shown so that the description is copied to all POs released against the contract line.

**8- LINE CATEGORY:** For each Line and Contract Category, use 60072 (for Multi-Function Office Machines (Combination of Fax-Copier-Sc)).

**9. LINE MERCHANDISE AMOUNT:** Enter the total estimate lease cost for each machine.

**10. CONTRACT MAXIMUM AMOUNT:** Enter a sum of all Line Amounts.

**11. ADD A DOCUMENT:** Upload quotes in EXCEL format.

**12. OCA APPROVAL:** Add **Richelle Valencia** as Ad Hoc Approver and email her at [Richelle.Valencia@sfgov.org](mailto:Richelle.Valencia@sfgov.org) requesting

The screenshot shows the 'Contract' entry form in PeopleSoft. It includes fields for Contract ID, Version, Status, and Approval Due Date. The 'Header' section contains details like Contract Style, Process Option, Supplier, and Dates. The 'Amount Summary' table shows the Maximum Amount set to 10,000.00 USD. The 'Contract Items' table is visible at the bottom, with a callout pointing to the 'Description' column. The 'Contract Comments' field is also visible, with a callout pointing to it.

**IF YOU ARE NOT FAMILIAR WITH SETTING UP CONTRACTS IN PEOPLESFT, FOLLOW THE DETAILED INSTRUCTIONS AT THE END OF THIS DOCUMENT INSTEAD.**

This screenshot shows the 'Contract Comments' field in the PeopleSoft interface. A red callout box highlights the field with the text "Enter cells Q4:Q25 here", indicating where the user should paste the data from their quote.

# CANON MODEL CONTRACT

Contract Entry  
Contract

SetID SHARE  
Contract ID 1000013849  
\*Status Open

**Contract Version**  
Version 1  
Status Current  
Approval Due Date

Upload Quote Form here.

Add a Document

Administrator/Buyer 28248 Handa, Diane

**Header**

\*Contract Style General Contract  
Process Option General Contract  
\*Supplier CANONSOLUT-00  
\*Supplier ID 0000023423  
CANON SOLUTIONS AMERICA INC

- Edit Comments
- Contract Activities
- Primary Contact Info
- Contract Header Agreement
- Contract Releases
- Custom Fields
- Activity Log
- Document Status
- Thresholds & Notifications
- Resource Roster
- Project Team

\*Begin Date 04/01/2019  
Expire Date 03/31/2022  
Renewal Date

**Amount Summary**

Maximum Amount 10,000.00 USD

Update Description

Currency USD  
Primary Contact  
Supplier Contract Ref CopySmart TC 98104\_CANON  
Description 98104C CANON MODEL TEMPLATE  
Master Contract ID 000000002

Line Item Released Amount 0.00  
Category Released Amount 0.00  
Open Item Released Amount 0.00  
Total Released Amount 0.00

Remaining Amount 10,000.00  
Remaining Percent 100.00

Tax Exempt ID  
Contract Type PCTCC  
Department 232177 ADM OCA - Procurement  
Purchasing Authority ITC Term Contract

- Local Hire
- Prevailing Wage

CMD Compliance Officer  
 Tax Exempt

**Order Contract Options**

**Voucher Contract Options**

Invoice Number  
AP Business Unit  
Accounting Template  
Payment Terms ID 030  
Basis Date Type

Gross Amount 0.00 USD  
Freight Amount 0.00  
Sales Tax Amount 0.00  
VAT Amount 0.00  
Misc Charge Amount 0.00

Description  
Supplier Item ID  
Supplier's Catalog  
Miscellaneous Charges  
Retention  
Manufacturer ID  
Mfg Item ID  
Group ID

Search Cancel Search Clear Results Bypass Search Results Warn Before Autosaving

**Contract Items**

Line	Item	Description	UOM	Category	Merchandise Amt	Status
1	MODEL # &		EA	80072		Active

Update each Line Item

Copy cells Q4:Q25 from Quote Form

**Contract Categories**

Line	Category	Description	Status
1	80072	Multi-Function Office Machines (Combination of Fax-Copier-Sc	Active

# RICOH MODEL CONTRACT

Contract Entry  
Contract

SetID SHARE  
Contract ID 1000013851  
\*Status Open  
Administrator/Buyer 28248 Handa, Diane

Contract Version  
Version 1  
Status Current  
Approval Due Date  
Add a Document

Upload Quote Form here.

Header  
\*Contract Style General Contract  
Process Option General Contract  
\*Supplier RICOHUSAIN-001  
\*Supplier ID 0000012182  
\*Begin Date 03/28/2019  
Expire Date 03/31/2022  
Renewal Date  
Currency USD CRRNT  
Primary Contact  
Supplier Contract Ref CopySmart.TC.98104\_RICOH  
Description 98104R RICOH MODEL TEMPLATE  
Master Contract ID 000000003  
Tax Exempt ID  
Contract Type PCTCC  
Department 232177 ADM OCA - Procurement  
Purchasing Authority TC Term Contract  
CMD Compliance Officer  
Tax Exempt

Amount Summary

Maximum Amount	10,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	

Update Description

Order Contract Options

Voucher Contract Options

Invoice Number		Gross Amount	0.00	USD
AP Business Unit		Freight Amount	0.00	
Accounting Template		Sales Tax Amount	0.00	
Payment Terms ID 030		VAT Amount	0.00	
Basis Date Type		Misc Charge Amount	0.00	
Description		Miscellaneous Charges		Retention
Supplier Item ID		Manufacturer ID		
Supplier's Catalog		Mfg Item ID		
		Group ID		

Search Cancel Search Clear Results Bypass Search Results Warn Before Autosaving

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Line	Item	Description	UOM	Category	Merchandise Amt	Status
1	MODEL # &		EA	80072		Active

Update each line item

Copy cells Q4:Q25 from Quote Form

Contract Categories

Lines

Line	Category	Description	Status
1	80072	Multi-Function Office Machines (Combination of Fax-Copier-Sc	Active

Save Return to Search Notify Refresh Add Update/Display Correct History



# XEROX MODEL CONTRACT

Contract Entry  
Contract

SetID: SHARE  
Contract ID: 1000013650  
\*Status: Open  
Administrator/Buyer: 28248 Handa, Diane

**Contract Version**  
Version: 1  
Status: Current  
Approval Due Date:

Upload Quote Form here.

**Header**

\*Contract Style: General Contract  
Process Option: General Contract  
\*Supplier: XEROXCORPO-0  
\*Supplier ID: 0000008015 XEROX CORPORATION  
\*Begin Date: 03/28/2019  
Expire Date: 03/31/2022  
Renewal Date:   
Currency: USD CRRNT  
Primary Contact:   
Supplier Contract Ref: CopySmart TC 96104\_XEROX  
Description: 96104X XEROX MODEL TEMPLATE  
Master Contract ID: 0000000004  
Tax Exempt ID:   
Contract Type: PCTCC  
Department: 232177 ADM OCA - Procurement  
Purchasing Authority: TC Term Contract  
CMD Compliance Officer:   
 Tax Exempt

Update Description

**Amount Summary**

Maximum Amount	10,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	
Remaining Amount	10,000.00	
Remaining Percent	100.00	

Local Hire  
 Prevailing Wage

**Order Contract Options**

**Voucher Contract Options**

Invoice Number:   
AP Business Unit:   
Accounting Template:   
Payment Terms ID: 030  
Basis Date Type:   
Description:   
Supplier Item ID:   
Supplier's Catalog:   
Gross Amount:  0.00 USD  
Freight Amount:  0.00  
Sales Tax Amount:  0.00  
VAT Amount:  0.00  
Misc Charge Amount:  0.00  
Miscellaneous Charges:  Retention:   
Manufacturer ID:   
Mfg Item ID:   
Group ID:   
    Bypass Search Results  Warn Before Autosaving

**Contract Items**

Catalog Search    Item Search    Search for Contract Lines

Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	UM	Category	Merchandise Amt	Status
1	<span style="border: 1px solid red; padding: 2px;">MODEL # &amp;</span>			EA 80072		Active

Update each line item

Copy cells Q4:Q25 from Quote Form

**Contract Categories**

Personalize | Find | View All | First 1 of 1 Last

Line	Category	Description	Status
1	80072	Multi-Function Office Machines (Combination of Fax-Copier-Sc	Active

## **COPYSMART PROGRAM: Creating a Supplier Contract for CopySmart Copier Leases**



### **STEP-BY-STEP Instructions**

---

These step-by-step instructions will take you through the process to create a Contract ID for your CopySmart Copier Leases.


1. SF Procurement > Supplier Contracts > Contract Entry
2. Click **"Add."**
3. Click **"Copy From Contract."**
4. In "Contract ID" field, enter **1000013649** for Canon; **1000013651** for Ricoh; or **1000013650** for Xerox.
5. Click on **"Search."**
6. Select the Contract ID, and click **"OK."**
7. In "Administrator/Buyer," enter **YOUR DSW number.**
8. Change "Begin Date" and "Expire Date" to reflect lease **START/END** dates.
9. Change "Description" field to reflect your specific Department's lease(s).
  - a. **DO NOT** Delete **"96104C\_"; "96104R\_";** or **96104X\_"** from the Description.
  - b. Example: *96104C\_OCA Canon MFDs*
10. Change "Department" field to **YOUR Department.**
11. In "Maximum Amount" field, enter the **sum of all** "Est. Total Lease" amounts from your completed CopySmart Quote Form(s).
12. Click the triangle icon next to "Contract Open Item Reference" section.
  - a. Check the **"Price Can Be Changed on Order"** box.
13. Enter one (1) copier lease per line.

Line 1:

  - a. In "Description" field, enter the **Model #, Model Description, and Location** from your completed CopySmart Quote Form.
  - b. In "Merchandise Amount" field, enter **"Est. Total Lease"** amount from your completed CopySmart Quote Form.
  - c. Click the "Line Details" icon. 
    - i. Click **"Expand All."**
    - ii. Check the **"Price Can Be Changed on Order"** box.
    - iii. Check the **"Amount Only"** box.
    - iv. Click **"OK."**
  - d. Click the "Line Comments" icon: 
    - i. Copy cells **Q4:Q22** from your completed CopySmart Form.
      1. Enter **Deliver To and Bill To addresses.**
      2. Enter **Department Contact and contact information.**
    - ii. Copy the following text (based on CopySmart contractor):
      1. For Canon: **This PO is subject to the terms and conditions of CopySmart Master Agreement Contract ID 1000013424 (OCA TC 96104).**
      2. For Ricoh: **This PO is subject to the terms and conditions of CopySmart Master Agreement Contract ID 1000013426 (OCA TC 96104).**
      3. For Xerox: **This PO is subject to the terms and conditions of CopySmart Master Agreement Contract ID 1000013425 (OCA TC 96104).**
    - iii. Check all 4 boxes:
      1. Send to Supplier

**COPYSMART PROGRAM: Creating a Supplier Contract for CopySmart Copier Leases**  
**STEP-BY-STEP Instructions**

---

2. Show at Receipt
    3. Copy to Purchase Order
    4. Show at Voucher
  - iv. Click **“OK.”**
14. For additional copier leases:
  - a. Add new line. 
  - b. Repeat Step 13 for each additional line.**
15. Click **“Add a Document”** button after all lines have been populated.
16. From the **“Document Type”** drop-down, select **“Contract signed outside of FSP.”**
17. Click on the **“Import Document”** button.
18. In **“Version”** field, enter **“1.”**
19. From **“Status”** drop-down, select **“Draft.”**
20. In **“Status Date”** field, enter **today’s date.**
21. Leave **“Status Time”** field blank.
22. Click **“Upload”** to upload your completed CopySmart Quote Form(s) as a single Excel file or PDF file.
23. Click **“Done with Import.”**
24. Click **“Submit for Approval”** on the Document Management Screen.
25. Add [Richelle.Valencia@sfgov.org](mailto:Richelle.Valencia@sfgov.org) as an ad hoc approver. Send email asking to review and approve contract in PS.

**CopySmart Supplier Contact Info:**

**CANON SOLUTIONS AMERICA:**

Jeffrey Carvalho

- Work: 415.743.7324

- Cell: 415.999.1389

- Email: [jcarvalho@csa.canon.com](mailto:jcarvalho@csa.canon.com)

**RICOH USA:**

Darren P. Davis

- Cell: 415.261.0035

- Email: [Darren.Davis@ricoh-usa.com](mailto:Darren.Davis@ricoh-usa.com)

**XEROX CORPORATION:**

Scott Reiber

- Work: 925.701.1657

- Cell: 505.264.7071

- Email: [scott.reiber@xerox.com](mailto:scott.reiber@xerox.com)

**FOR NEW FLEETS,  
DEPARTMENTS  
ARE  
ENCOURAGED  
TO OBTAIN  
QUOTES FROM  
ALL COPYSMART  
SUPPLIERS PRIOR  
TO SELECTING  
ONE.**