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 prepopulate their own contracts.

SUPPLIER MODEL CONTRACT ID TO COPY FROM

CANON 1000013649 RICOH 1000013651 XEROX 1000013650

 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 <u>one</u> 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), <u>copy cells Q4:Q25 from</u> the corresponding Quote.

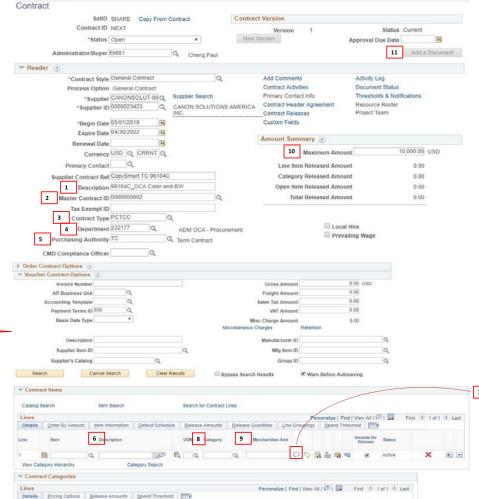
-Check each checkbox shown so that the description is copied to all POs released against the contract line.

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

- 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 requesting

Save Notify Refresh

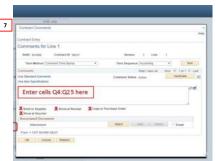


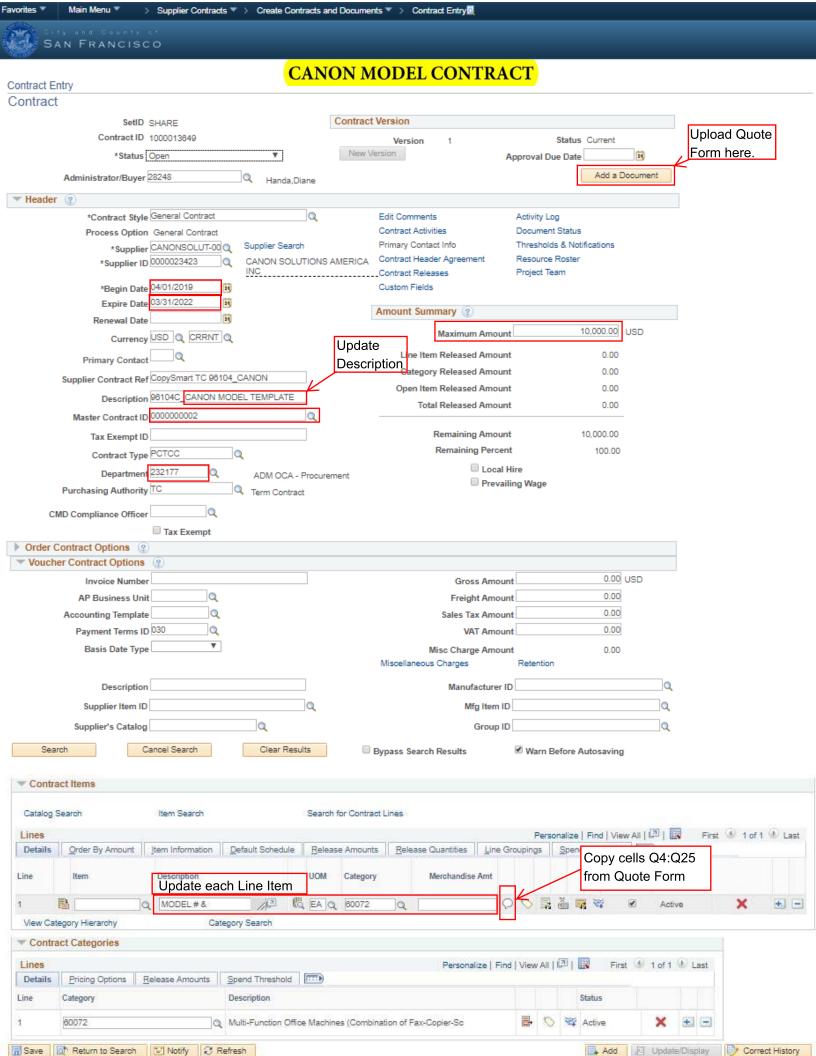
👺 🛇 💝 Active

(#3 (E)

Add Dipdate/Display Correct History

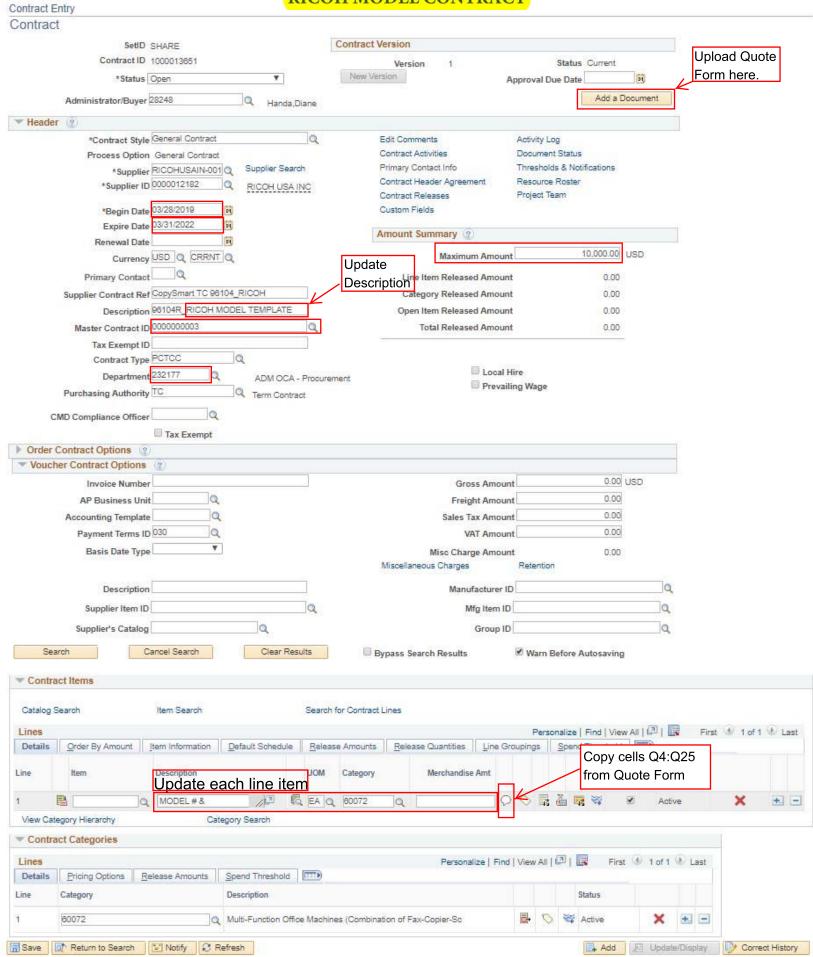
IF YOU ARE NOT
FAMILIAR WITH
SETTING UP CONTRACTS
IN PEOPLESOFT, FOLLOW
THE DETAILED
INSTRUCTIONS AT THE
END OF THIS DOCUMENT
INSTEAD.





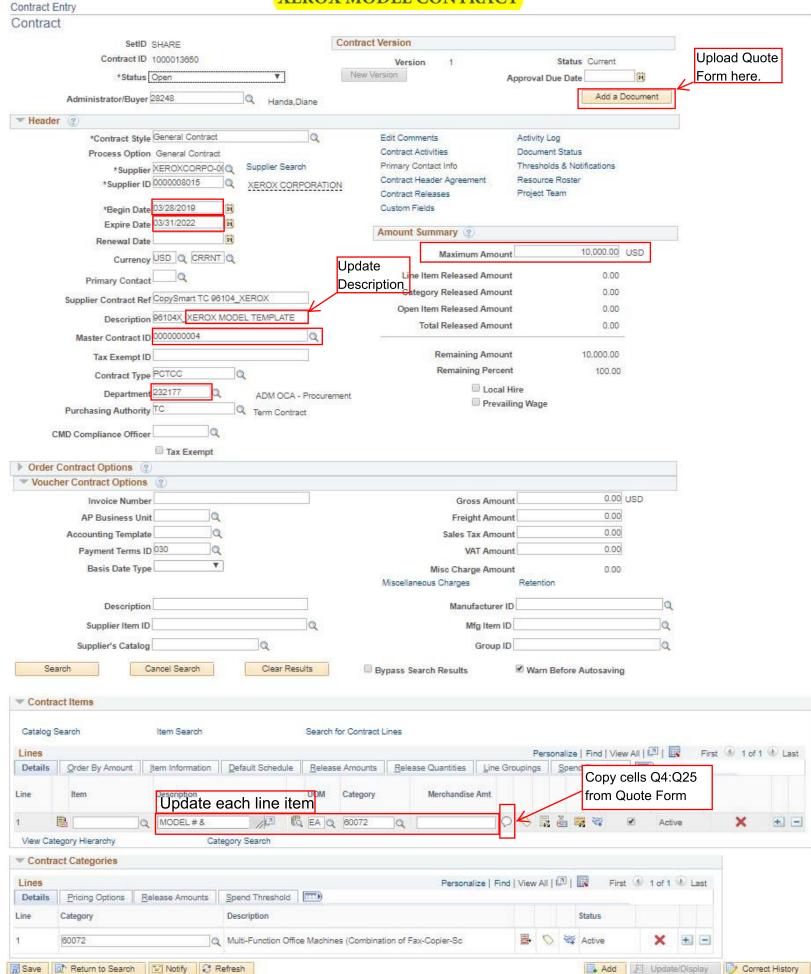


RICOH MODEL CONTRACT





XEROX MODEL CONTRACT



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

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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 <u>Richelle.Valencia@sfgov.org</u> as an ad hoc approver. Send email asking to review and approve contract in PS.

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CopySmart Supplier Contact Info:

CANON SOLUTIONS AMERICA:

Jeffrey Carvalho

- Work: 415.743.7324 - Cell: 415.999.1389

- Email: <u>icarvalho@csa.canon.com</u>

RICOH USA:

Darren P. Davis

- Cell: 415.261.0035

- Email: Darren.Davis@ricoh-usa.com

XEROX CORPORATION:

Scott Reiber

- Work: 925.701.1657 - Cell: 505.264.7071

- Email: scott.reiber@xerox.com

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