



London N. Breed
Mayor

Alaric Degrafinried
Director and Purchaser
Purchasing

MEMORANDUM

DATE: April 1, 2019
TO: All Departments
FROM: Alaric Degrafinried, Purchaser and Director of the Office of Contract Administration
SUBJECT: Guidance on New CopySmart Agreements (OCA TC 96104)

The new CopySmart Agreements under OCA TC 96104 are effective as of April 1, 2019. To enter into new leases under the new CopySmart Agreements, Departments are instructed to follow the below guidance.

NEW LEASES:

Assessments from CopySmart suppliers:

- Departments are strongly encouraged to solicit proposals/quotes from all three CopySmart suppliers (Canon Solutions America, Ricoh USA, Xerox Corporation). This will allow Departments to become familiar with the various offerings and choose the suite of MFD Equipment that best meets the needs for their entire fleet.

Setting up New Leases in PeopleSoft:

- Departments will continue to use Supplier Contracts in PeopleSoft for their CopySmart leases and release purchase orders off of them.
 1. To set up a new contract, use the “Copy From Contract” function to pre-populate your contract using one of OCA’s “model” CopySmart contracts (see attached):
 - Canon Solutions America: 1000013649
 - Ricoh USA: 1000013651
 - Xerox Corporation: 1000013650
 2. Update fields highlighted in red.
 3. Copy cells Q4:Q25 from the CopySmart Quote Form into the Line COMMENT.
 4. Once ready, contact Diane Handa (diane.handa@sfgov.org) for approval.
- A copy of the new CopySmart Quote Form accompanies this memo and can also be found on the OCA website at <https://sfgov.org/oca/frequently-asked-questions-0>. Use one CopySmart Quote Form per copier lease.

EXISTING LEASES:

- Currently active leases under one of the expired CopySmart Agreements will remain valid through the lease end date. No new leases or extensions of existing leases will be allowed under the expired CopySmart Agreements (OCA TC 96103) with Konica-Minolta, Ricoh USA, and Xerox Corporation.

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
*Begin Date 04/01/2019
Expire Date 03/31/2022
Renewal Date
Currency USD
Primary Contact
Supplier Contract Ref CopySmart TC 98104_CANON
Description 98104C_CANON MODEL TEMPLATE
Master Contract ID 000000002
Tax Exempt ID
Contract Type PCTCC
Department 232177
Purchasing Authority ITC
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	
Remaining Amount	10,000.00	
Remaining Percent	100.00	

Update Description

Maximum Amount 10,000.00 USD

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

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

Personalize Find View All First 1 of 1 Last

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

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

RICOH MODEL CONTRACT

Contract Entry
Contract

SetID SHARE
Contract ID 1000013851

Contract Version

Version 1

Status Current

*Status

Approval Due Date

Administrator/Buyer Hands, Diane

Header

*Contract Style

Process Option

*Supplier

*Supplier ID

*Begin Date

Expire Date

Renewal Date

Currency

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

Tax Exempt ID

Contract Type

Department ADM OCA - Procurement

Purchasing Authority Term Contract

CMD Compliance Officer

Tax Exempt

-
-
-
-
-
-
-
-
-
-
-

Amount Summary

Maximum Amount USD

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

- Local Hire
- Prevailing Wage

Order Contract Options

Voucher Contract Options

Invoice Number

AP Business Unit

Accounting Template

Payment Terms ID

Basis Date Type

Gross Amount USD

Freight Amount

Sales Tax Amount

VAT Amount

Misc Charge Amount

Miscellaneous Charges Retention

Description

Manufacturer ID

Supplier Item ID

Mfg Item ID

Supplier's Catalog

Group ID

Bypass Search Results Warn Before Autosaving

Contract Items

Catalog Search Item Search Search for Contract Lines

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

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1	<input type="text"/>	MODEL # & <input type="text"/>	EA	80072	<input type="text"/>	<input checked="" type="checkbox"/>	Active

Contract Categories

Lines 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

XEROX MODEL CONTRACT

Contract Entry
Contract

SetID: SHARE **Contract Version**

Contract ID: 1000013650 Version: 1 Status: Current

*Status: Open Approval Due Date:

Administrator/Buyer: 28248 Handa, Diane

Header ?

<p>*Contract Style: General Contract</p> <p>Process Option: General Contract</p> <p>*Supplier: XEROXCORPO-0 <input type="button" value="Supplier Search"/></p> <p>*Supplier ID: 0000008015 XEROX CORPORATION</p> <p>*Begin Date: 03/28/2019</p> <p>Expire Date: 03/31/2022</p> <p>Renewal Date: </p> <p>Currency: USD CRRNT</p> <p>Primary Contact: </p> <p>Supplier Contract Ref: CopySmart TC 96104_XEROX</p> <p>Description: 96104X_XEROX MODEL TEMPLATE</p> <p>Master Contract ID: 0000000004</p> <p>Tax Exempt ID: </p> <p>Contract Type: PCTCC</p> <p>Department: 232177 ADM OCA - Procurement</p> <p>Purchasing Authority: TC Term Contract</p> <p>CMD Compliance Officer: </p> <p><input type="checkbox"/> Tax Exempt</p>	<p><input type="button" value="Edit Comments"/> <input type="button" value="Activity Log"/></p> <p><input type="button" value="Contract Activities"/> <input type="button" value="Document Status"/></p> <p><input type="button" value="Primary Contact Info"/> <input type="button" value="Thresholds & Notifications"/></p> <p><input type="button" value="Contract Header Agreement"/> <input type="button" value="Resource Roster"/></p> <p><input type="button" value="Contract Releases"/> <input type="button" value="Project Team"/></p> <p><input type="button" value="Custom Fields"/></p> <hr/> <p>Amount Summary ?</p> <table border="0" style="width: 100%;"> <tr> <td style="text-align: right;">Maximum Amount</td> <td style="text-align: right;">10,000.00</td> <td style="text-align: right;">USD</td> </tr> <tr> <td style="text-align: right;">Line Item Released Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td style="text-align: right;">Category Released Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td style="text-align: right;">Open Item Released Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td style="text-align: right;">Total Released Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> </table> <hr/> <table border="0" style="width: 100%;"> <tr> <td style="text-align: right;">Remaining Amount</td> <td style="text-align: right;">10,000.00</td> </tr> <tr> <td style="text-align: right;">Remaining Percent</td> <td style="text-align: right;">100.00</td> </tr> </table> <p><input type="checkbox"/> Local Hire</p> <p><input type="checkbox"/> Prevailing Wage</p>	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
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Order Contract Options ?

Voucher Contract Options ?

<p>Invoice Number: </p> <p>AP Business Unit: </p> <p>Accounting Template: </p> <p>Payment Terms ID: 030</p> <p>Basis Date Type: </p> <p>Description: </p> <p>Supplier Item ID: </p> <p>Supplier's Catalog: </p>	<table border="0" style="width: 100%;"> <tr> <td style="text-align: right;">Gross Amount</td> <td style="text-align: right;">0.00</td> <td style="text-align: right;">USD</td> </tr> <tr> <td style="text-align: right;">Freight Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td style="text-align: right;">Sales Tax Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td style="text-align: right;">VAT Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> <tr> <td style="text-align: right;">Misc Charge Amount</td> <td style="text-align: right;">0.00</td> <td></td> </tr> </table> <p>Miscellaneous Charges: Retention: </p> <p>Manufacturer ID: </p> <p>Mfg Item ID: </p> <p>Group ID: </p>	Gross Amount	0.00	USD	Freight Amount	0.00		Sales Tax Amount	0.00		VAT Amount	0.00		Misc Charge Amount	0.00	
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 Bypass Search Results
 Warn Before Autosaving

Contract Items

Catalog Search Item Search Search for Contract Lines

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

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1		MODEL # & 	EA	80072		<input checked="" type="checkbox"/>	Active

[View Category Hierarchy](#) [Category Search](#)

Contract Categories

Lines 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



Supplier and Department CopySmart Order Form (OCA TC 96104)

DEPARTMENT USE			SUPPLIER USE	
Department Name:			Quote Date:	
Ordered By:			Quote #:	
Dept. Contact:		Ph #:	Quote By:	
Department Approver:			Supplier Contract #:	
			Supplier Telephone Number:	

DELIVERY/BILLING INFORMATION		
SUPPLIER INFORMATION:	DELIVER TO:	BILL TO ADDRESS:
SUPPLIER REMITTANCE ADDRESS:	SPECIAL INSTRUCTIONS / REQUIREMENTS (if necessary):	
EST. LEASE START DATE:		
EST. LEASE END DATE:		

One MFD + Options per form.

Model #	Monthly Lease Amount	Term	Model Description
	\$ -		

Option Part #	Option Amount	Option Description
1	\$ -	
2	\$ -	
3	\$ -	
4	\$ -	
5	\$ -	
6	\$ -	
7	\$ -	
8	\$ -	
Total Monthly Lease plus Options	\$ -	

If needed, use an additional copy of this order form to list additional options.*

Cost per Copy Estimates		CPC Charge	Per Month Totals		
Black / White Estimated Monthly Volume	0	\$ -	\$ -		
Color Estimated Monthly Volume	0	\$ -	\$ -	Total Monthly B/W & Color CPC	\$ -

Monthly Total	Sales Tax (8.5%)	Subtotal	Est. TOTAL Lease = (Monthly Subtotal x Lease Term)	\$0.00
\$ -	\$ -	\$ -		

TRANSFERRING LEASE INFO INTO PEOPLESOFT

1. Cells Q4:Q25 in the Quote Form will auto-populate with Lease info.
2. Copy cells Q4:Q25 into Line COMMENTS.

LEASE INFO
Copy the Below Table into the LINE Comment
Model #: 12345
Monthly Lease Amount 150
Model #: 12345
Monthly Lease Amount: \$150.00
Option: Stapler
Option: 3-hole punch
Option:
Option:
Option:
Option:
Option:
Option:
Lease Term: 36 months
Lease Start Date: 04/01/2019
Lease End Date: 03/31/2022
B/W CPC: 10000 pages @ \$0.001
COLOR CPC: 10000 pages @ \$0.010
Total Est Annual Lease: \$10487.61
DELIVER TO: City Hall, Room 430 1 Carlton B Goodlett Pl
BILL TO ADDRESS: City Hall, Room 430 1 Carlton B Goodlett Pl SF, CA 94102

CopySmart Supplier Contact Info:**CANON SOLUTIONS AMERICA:**

Jeffrey Carvalho

- Work: 415.743.7324

- Cell: 415.999.1389

- Email: jcarvalho@csa.canon.com

RICOH USA:

Kelita Lee

- Cell: 510-909-1622

- Email: Kelita.Lee@ricoh-usa.com

XEROX CORPORATION:

Scott Reiber

- Work: 925.701.1657

- Cell: 505.264.7071

- Email: scott.reiber@xerox.com