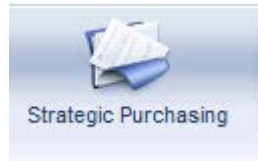


Exercise 4

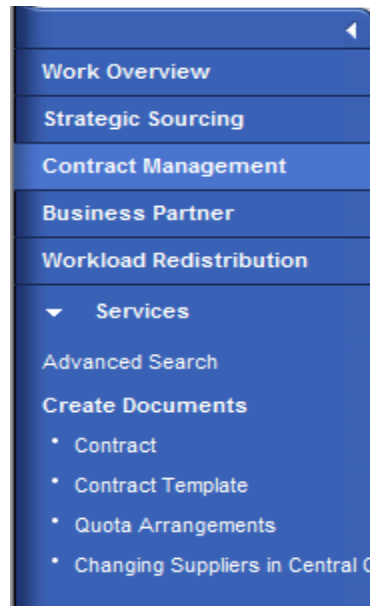
Create a Product Category Contract

Exercise 4: Create a Product Category Contract

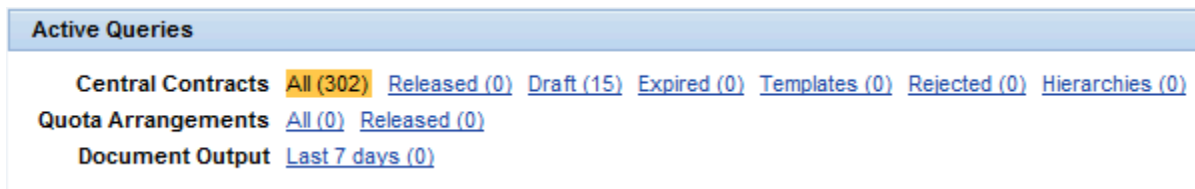
1. Log into SRM.
2. Click on the **‘Strategic Purchasing’** folder at the top of the page.



3. Then click on **‘Contract Management’** located on left-hand side of the blue menu bar.



4. Under the **‘Active Queries’** heading, click on **Central Contracts ‘All’**. This will generate a list of all active contracts regardless of their status.



5. Click **“Show Quick Criteria Maintenance”** to search for the contract you created in Exercise 1. Enter the contract number in the **‘Number’** field and click **‘Apply’**.

6. Click on the contract number to open the contract.

7. Click **‘Edit’**

8. Click the **‘Items’** Tab.

9. On the first blank line item, use the drop down to change the Item Category from **‘Normal’** to **‘Product Category’**

▼ Items						
Details Select ▾ Add Item ▾ Exercise Option Copy Paste Duplicate Delete						
Item Category	Option Type	Item Number	Description	Product Category	Target Quantity	Op
Normal		1	Motor and Engine Parts and Accessories (	12056	1	
Normal ▾					0.000	
Normal ▾					0.000	

10. In the **‘Description’** field, enter your generic description.

▼ Items										
Details Select ▾ Add Item ▾ Exercise Option Copy Paste Duplicate Delete										
Item Category	Option Type	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
Normal		1	Motor and Engine Parts and Accessories (	12056	1		EA	0.00	100.00	USD
Product Category		2	Motor and Engine Parts - 65% off list	12056	0.000			500,000.00	0.00	USD

11. Enter the NIGP code in the Product Category Field.

▼ Items										
Details Select ▾ Add Item ▾ Exercise Option Copy Paste Duplicate Delete										
Item Category	Option Type	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
Normal		1	Motor and Engine Parts and Accessories (	12056	1		EA	0.00	100.00	USD
Product Category		2	Motor and Engine Parts - 65% off list	12056	0.000			500,000.00	0.00	USD

12. Enter the Target Value for the Line Item

Item Category	Option Type	Item Number	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency
Normal		1	Motor and Engine Parts and Accessories (	12056	1		EA	0.00	100.00	USD
Product Category		2	Motor and Engine Parts - 65% off list	12056	0.000			500,000.00	0.00	USD

13. Select the original line item on the contract and click ‘Details’.

14. On the General Data screen, use the drop down to change the Status to “Inactive”

Details for Selected Item 1 : Motor and Engine Parts and Accessories (

General Data | Conditions | Account Assignment | Notes and Attachments | Approval Preview | Payment | Release

Basic

Identification

Item Number: 1
 Item Type: Material
 Item Category: * Normal
 Product ID:
 Description: Motor and Engine Parts and Accessories (

Product Category: * 12056 Motor and Engine Parts and Accessories (Marine) [x]

Further Properties

Reason Code: []

Currency, Values and Pricing

Target Value/ Currency: 0.00 USD
 Target Quantity/ Unit: 1 EA
 Price: 100.00 USD per: 1 EA
 Tax Code: []

Alert Release Quantity: 0 %
 Not Separately Priced: []
 Alert Release Value: 0 %
 Minimum Order Quantity: 0 EA
 Minimum Order Value: 0.00 USD
 Release Quantity: 0 EA
 Release Value: 0.00 USD

Service and Delivery

Delivery Time: 0 Day(s)
 Delivery Priority: 00
 Under/ Overdelivery Tolerance: 0.00 % / 0.00 % [] Unlimited:
 Acceptance at Origin: []

Status and Statistics

Status: Inactive
 Closeout Status: []
 Storage location: []

15. Click ‘Release’ after making any changes in order to save and issue the contract.