

Documentation Folder | Multiple Prime Contracts

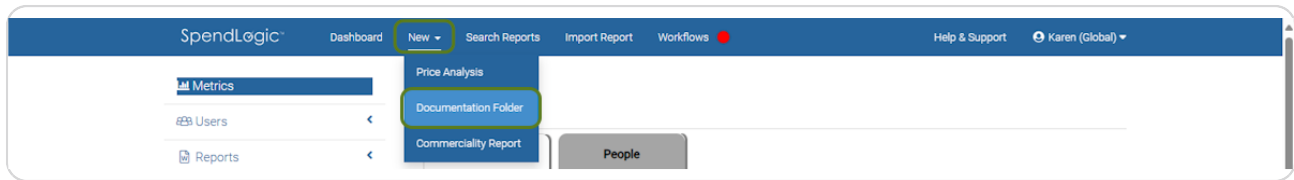
SpendLogic has added the capability for Buyers to select multiple contracts against one Purchase Order. Follow the easy step-by-step process.

12 Steps

Created by	Creation Date	Last Updated
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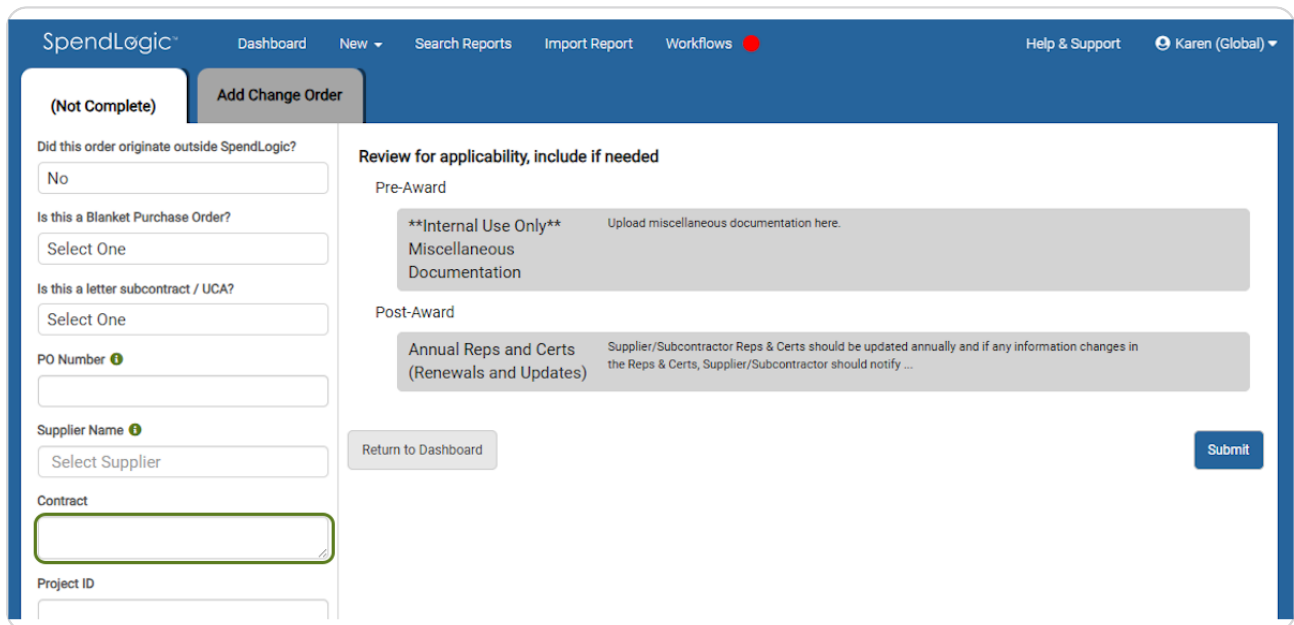
STEP 1

Create a New Documentation Folder



STEP 2

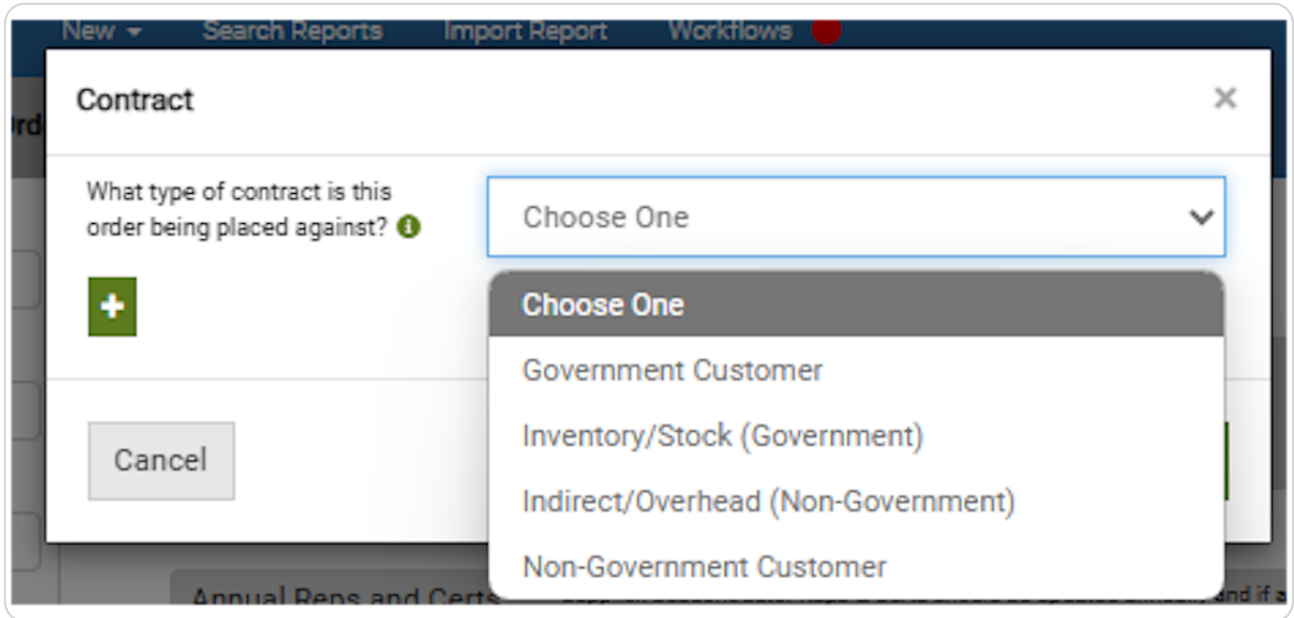
Click on Contract



STEP 3

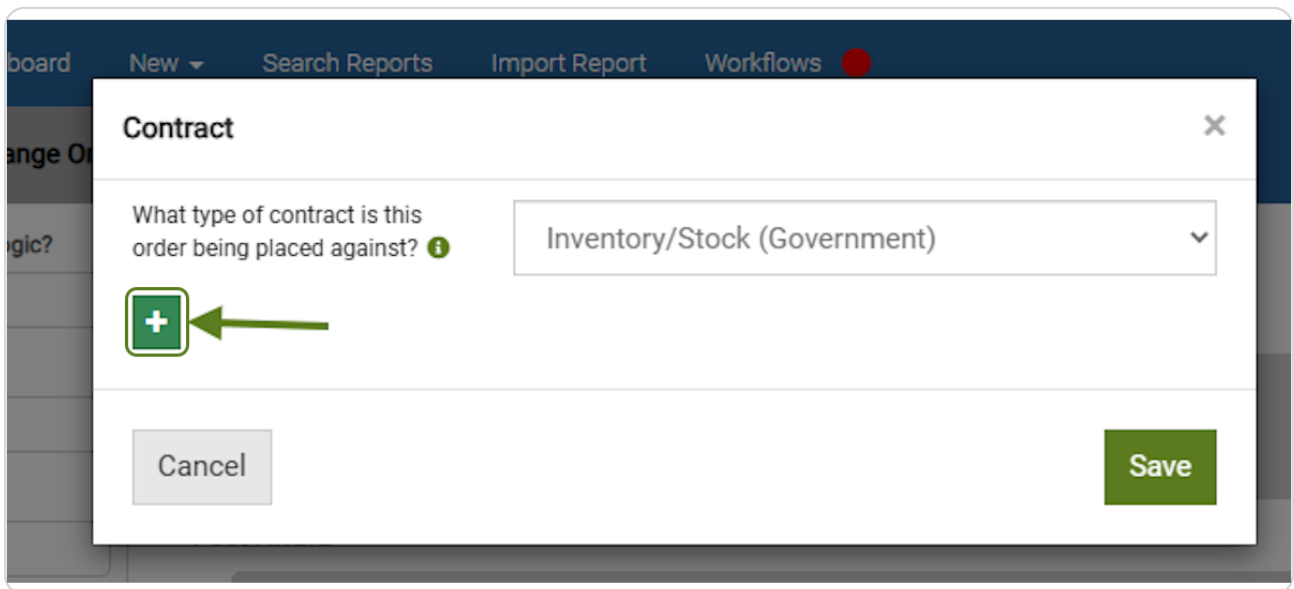
Make your selection from the dropdown options for what type of contract is this order being placed against.

Note: You will add contracts one at a time.



STEP 4

Add your next contract: Click the "+" to add the next contract



STEP 5

Make your next selection from the dropdown options of what type of contract is this order being placed against.

The screenshot shows a 'Contract' dialog box with the following elements:

- Header: 'Contract' with a close button (X).
- Question 1: 'What type of contract is this order being placed against?' with a dropdown menu showing 'Inventory/Stock (Government)'.
- Question 2: 'What type of contract is this order being placed against?' with a dropdown menu showing 'Government Customer', which is highlighted with a green border.
- Search section: 'Search existing contracts:' with a text input field containing 'Search contract number or description'.
- Bottom: 'Cancel' button on the left and 'Save' button on the right.

STEP 6

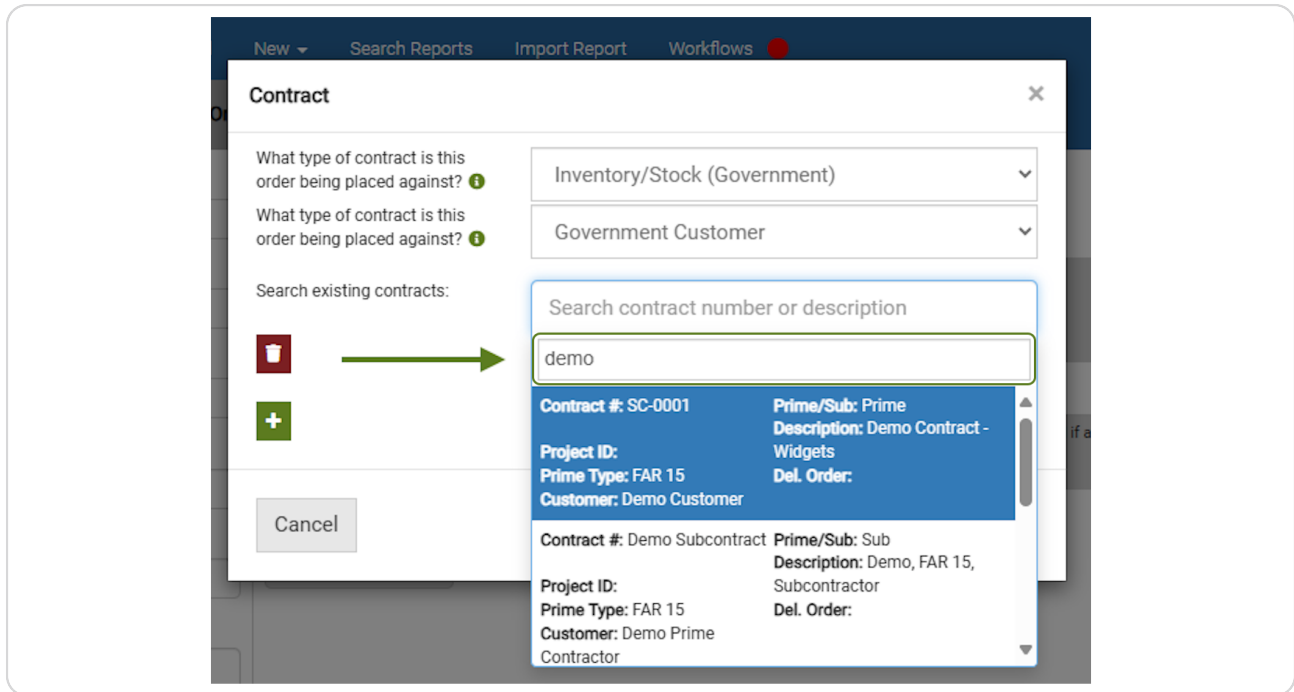
If adding a Government Contract, search for the specific contract

The screenshot shows a 'Contract' dialog box with the following elements:

- Title Bar:** 'Contract' with a close button (X).
- Form Fields:**
 - Two dropdown menus, both with a downward arrow. The first is set to 'Inventory/Stock (Government)'. The second is set to 'Government Customer'.
 - A search input field with the placeholder text 'Search contract number or description'. Below it is a smaller, empty input field.
 - A message below the search field: 'Please enter 1 or more characters'.
- Buttons:** A 'Cancel' button on the bottom left and a 'Save' button on the bottom right.
- Icons:** A red trash can icon and a green plus icon are visible on the left side of the dialog.

STEP 7

Search for your contract by entering known data in the search bar, e.g. Contract Number, Project ID, Customer Name, Contract Description



The screenshot shows a 'Contract' search dialog box. At the top, there are navigation tabs: 'New', 'Search Reports', 'Import Report', and 'Workflows'. The dialog has a title bar 'Contract' with a close button. Below the title bar, there are two dropdown menus for contract type and customer type. The first dropdown is set to 'Inventory/Stock (Government)' and the second to 'Government Customer'. Below these is a search bar labeled 'Search existing contracts:' with a search icon and a plus icon. The search bar contains the text 'demo'. A green arrow points from the plus icon to the search bar. Below the search bar, there is a list of search results. The first result is highlighted in blue and contains the following information:

Contract #: SC-0001	Prime/Sub: Prime
Project ID:	Description: Demo Contract - Widgets
Prime Type: FAR 15	Del. Order:
Customer: Demo Customer	

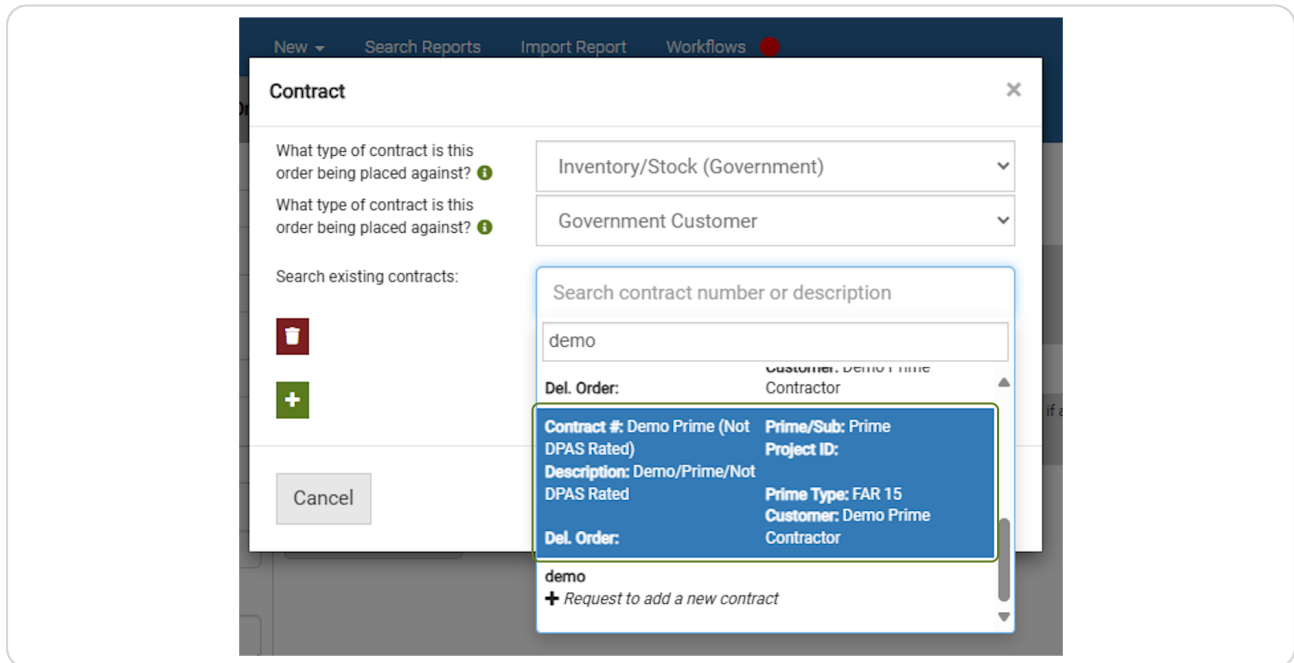
The second result is not highlighted and contains the following information:

Contract #: Demo Subcontract	Prime/Sub: Sub
Project ID:	Description: Demo, FAR 15, Subcontractor
Prime Type: FAR 15	Del. Order:
Customer: Demo Prime Contractor	

At the bottom left of the dialog is a 'Cancel' button.

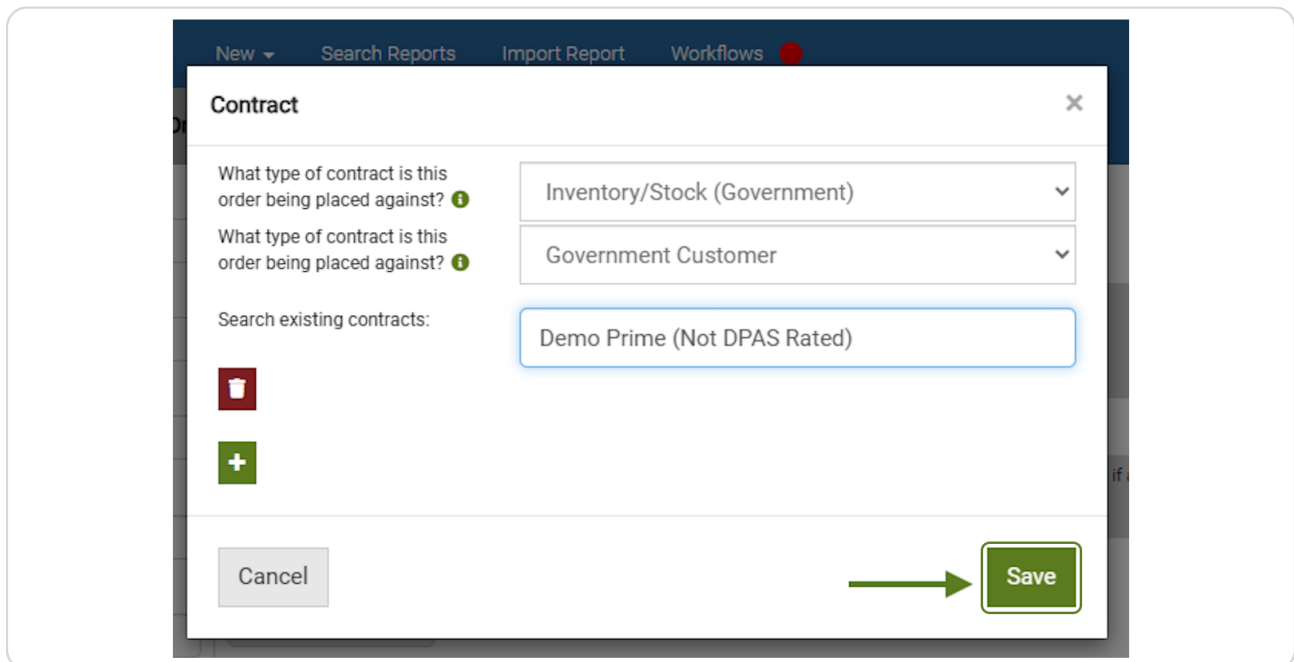
STEP 8

Make your selection



STEP 9

Once you have selected all applicable contracts, click "Save".



STEP 10

NOTE: All of your contract selections appear in the Left-Hand Blocks.

The system will automatically default to the selection with the most regulatory requirements. For example, documentation requirements will trigger on FAR 15 and DPAS if these are included in the list of contracts selected.

(Not Complete) Add Change Order

Did this order originate outside SpendLogic?
No

Is this a Blanket Purchase Order?
Select One

Is this a letter subcontract / UCA?
Select One

PO Number

Supplier Name
Select Supplier

Contract
Inventory/Stock (Government)
Demo Prime (Not DPAS Rated)
Demo (DPAS Rated)

Project ID
N/A

Review for applicability, include if needed

Pre-Award
Internal Use Only Upload miscellaneous documentation here.
Miscellaneous Documentation

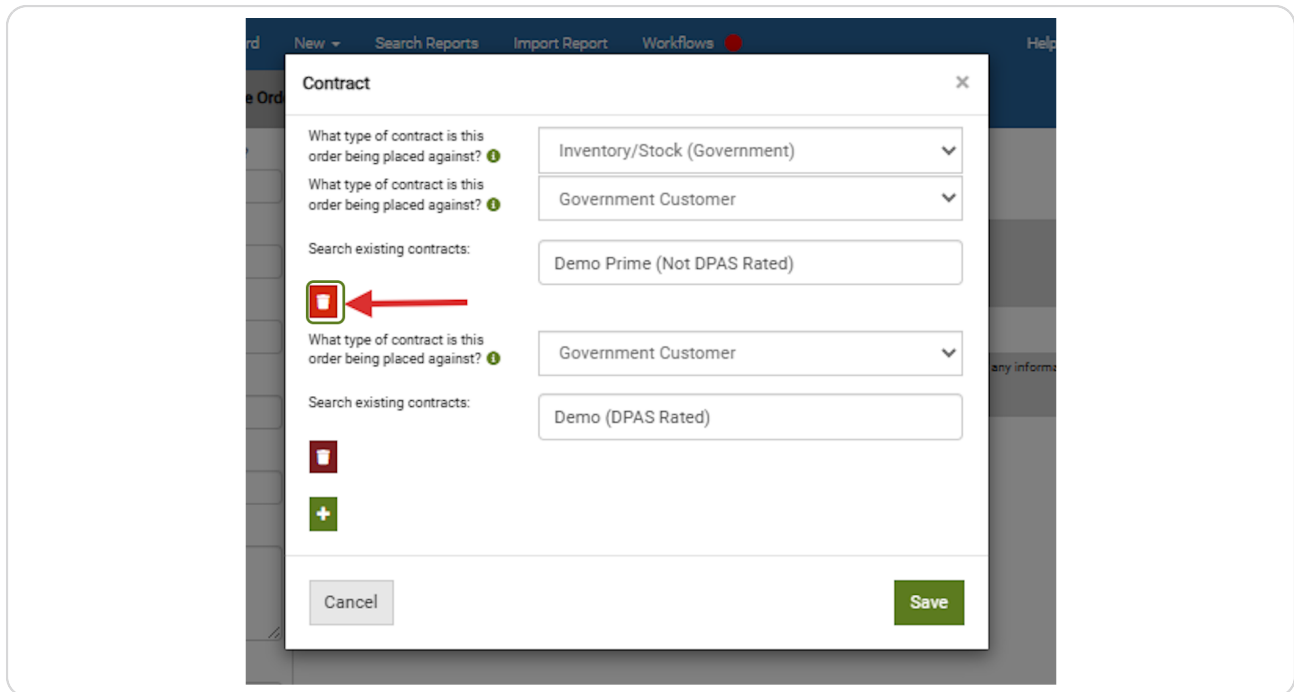
Post-Award
Annual Reps and Certs (Renewals and Updates) Supplier/Subcontractor Reps & Certs should be updated annually and if any information changes in the Reps & Certs, Supplier/Subcontractor should notify ...

Return to Dashboard Submit

STEP 11

Remove a Contract

If you need to remove a contract from the list of contracts added to your Documentation Folder, click the Trash Can Icon underneath the contract you wish to remove.




STEP 12

Click on Save after you have removed your contract.

The screenshot shows a 'Contract' dialog box with the following elements:

- Two dropdown menus for contract types: 'Inventory/Stock (Government)' and 'Government Customer'.
- A search field labeled 'Search existing contracts:' containing the text 'Demo (DPAS Rated)'.
- A list of results with a red trash icon and a green plus icon.
- Buttons for 'Cancel' and 'Save'.
- A green arrow pointing to the 'Save' button.

 If you have any questions, contact us at help@spendlogic.com

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