

## Introduction

Within AdvantageME, service contracts of any amount can be created (BP54). After an RFP document has been evaluated, a BP54 contract is created to solidify the agreement. This reference outlines the necessary steps to create a Contract (CT) document from an Evaluation (EV) document.

## Creating a CT Document from an RFP

1. Log into AdvantageME.
2. Search for Evaluation (EV) document in the Document Catalog. The selected EV document opens to the **Header** page.

**Note:** It is assumed that all the necessary steps on the EV have been completed. Please refer to the [303 Procurement Contracts](#) material for information about the EV document.

### Header Page

3. Open the **Document Creation** section. Enter the following information:
  - **Document Code**—CT
  - **Document Department Code**
  - **Document Unit Code**—Enter the **Workflow Unit**

4. Click Create Document.

5. Select **Awarded Items** from the Secondary Navigation panel of the EV page. The Awarded Items page opens.

### Awarded Items Page

6. Click on the document number that appears in the **Award Link** column to open the award document. The CT documents opens to the on the **Header** page.

### Header Page

7. Click **Edit**. Most of the information on the CT is inferred from the RFP document.

**NOTE:** You do not need to select a **Vendor** or a **Commodity**, as they are inferred from the RFP. Shipping and Billing Information is inferred from the RFP as well.

8. Select **Commodity** from the Secondary Navigation panel. The Commodity page opens.

### Commodity Page

9. In the **General Information** area, the following information will infer:

- **Line Type** (*Service*)
- **Contract Amount**
- **Service From Date**
- **Service To Date**
- **Extended Description**

**NOTE:** If the **Line Type** is *Service*, the **Extended Description** field should be used to describe the scope of the work to be performed.

10. Expand the **Shipping/Billing** section.

11. Enter the **Shipping** and **Billing Location** (if it is not populated already).

12. Select **Accounting** from the Secondary Navigation panel.

### Accounting Page

13. Click Insert New Line.

14. Enter the **Event Type**.

- ▶ Select PR05 if the amount is greater than \$2500
- ▶ Select PR07 if the amount is less than or equal to \$2500

15. Enter the **Line Amount** (this is usually the same amount as the **Contract Amount** field on the Commodity line).

16. In the **Fund Accounting** area, enter the following information:

- **Fund**
- **Department**
- **Unit**
- **Sub Unit**
- **Object**

17. Select **Save**.

18. Select **Validate**. If the system returns error messages, make the appropriate corrections and **Validate** again.

19. Select **Submit**. A message is returned, *Document submitted successfully*.

20. Click **Close**. The EV Header is displayed.

21. Select **Validate**. If the system returns error messages, make the appropriate corrections and **Validate** again.
22. Select **Submit**. A message is returned, *Document submitted successfully*.

## State of Maine Resources

Visit the AdvantageME Training Web Site for:

- Training Materials
- Video Demonstrations
- Help Desk Form
- AdvantageME Newsletter

For immediate assistance, contact the Help Desk at (207) 624-7700.

## State of Maine Policies

The Process for Scanning Contracts is as follows:

- Note the unique identifying number next to the dept number at the top of the page.
- Department user hand writes the AdvantageME-assigned number in the upper right hand corner of the signed contract document and forwards three copies to Division of Purchases (DOP). (This will allow DOP to match the CT to the hard copy.)
- DOP reviews the hard copy contract and enters approvals in AdvantageME.
- DOP scans approved contracts into the FORTIS system and returns two approved documents to the department.
- Department will keep one copy for their records and send one approved copy to the contractor.

# AdvantageME

## Financial Management System



## Creating Service Contract (CT) Documents from an RFP

*Quick Reference Card*