TRADOGRAM
CONTRACT MANAGEMENT GUIDE

Contract Management

Note: *Test documents created on the system can be deleted. To do so, please contact Tradogram support, indicating which documents should be cleared from the account.*

The contract management workflow allows multiple purchase orders to be created from a tracked repository of item quantities, monetary amounts, and/or time frames depending on the types of contracts that are established.

Contracts can also be created after concluding a strategic sourcing event or negotiation by using the “Request” feature on the system.

In this workflow testing guide, a standalone contract agreement will be created - though the process is nearly identical when performed as a follow-up step from the workflow above.

To create a new standalone contract agreement:

1. Click on “Transactions” in the left toolbar, and select “Contracts”
2. At the top right of the contract listing overview screen, click on the “Create Contract” option
3. Enter a name for the document in the “Contract Title” field
4. Under the “Contract Type” dropdown, select “Time & Material” (to track contracted item quantities that will determine what can be ordered during purchase order creation) or “General” (to track a monetary amount in relation to items that aren’t predetermined by the contract)
5. At the bottom left of the contract creation form, select either “Add Database Items” or “Add External Items”. For a “Fixed” contract, this selection will determine which items can be ordered from the contract on purchase orders. Items selected for a “General” contract will not have the selected item quantities tracked, but they will be listed on the contract overview for reference (this can be particularly useful for tracking things such as recurring service subscriptions - simply enter an external item to track a monetary amount)
6. Click on the “Next” button at the bottom right of the contract creation form
7. On the second step of the contract creation process, scroll down to the “Supplier” section and select one or more suppliers (or select the “Use a custom alternate supplier to add a new supplier profile entry)
8. Select the “Create Contract” button at the bottom right

Once the contract is created, it can be optionally sent to the supplier for review (this step is not mandatory). To preview how the contract will be displayed to suppliers when sent to them:

1. Open an entirely separate web browser from the current one (Internet Explorer, Firefox, Google Chrome, or an Incognito Window), log into the testing email address, and select the “View Contract” option contained in the email message
2. Click the “Accept Contract” option once the details have been reviewed. If “Decline Contract” is selected, the supplier will be prompted to leave a reason for doing so. The contract can then be adjusted and resent to the supplier based on the received feedback
3. Once accepted, the contract is considered to be mutually agreed upon by both parties. While item quantities and item amounts will no longer be able to be edited, the ability to edit the due date for the agreed terms will remain available

From this point onward, the workflow will follow the **Requisition Workflow**, or the **Purchase to Pay Workflow** as items are ordered from the established contract.

Workflow Testing Options

Ready to start testing?

Visit tradogram.com/resources/knowledge-base/user-guide/ for more workflow guides.

Available workflows for testing on a free account:

- Testing purchase order, invoice, and delivery entry (Purchase to Pay Solution)
- Testing request (RFX) creation (Strategic Sourcing and Negotiation Solution)
- Testing contract creation (Contract Management Solution)
- Requisition creation (Multiple Solutions)
- Approval configuration (Spend Control Solution)