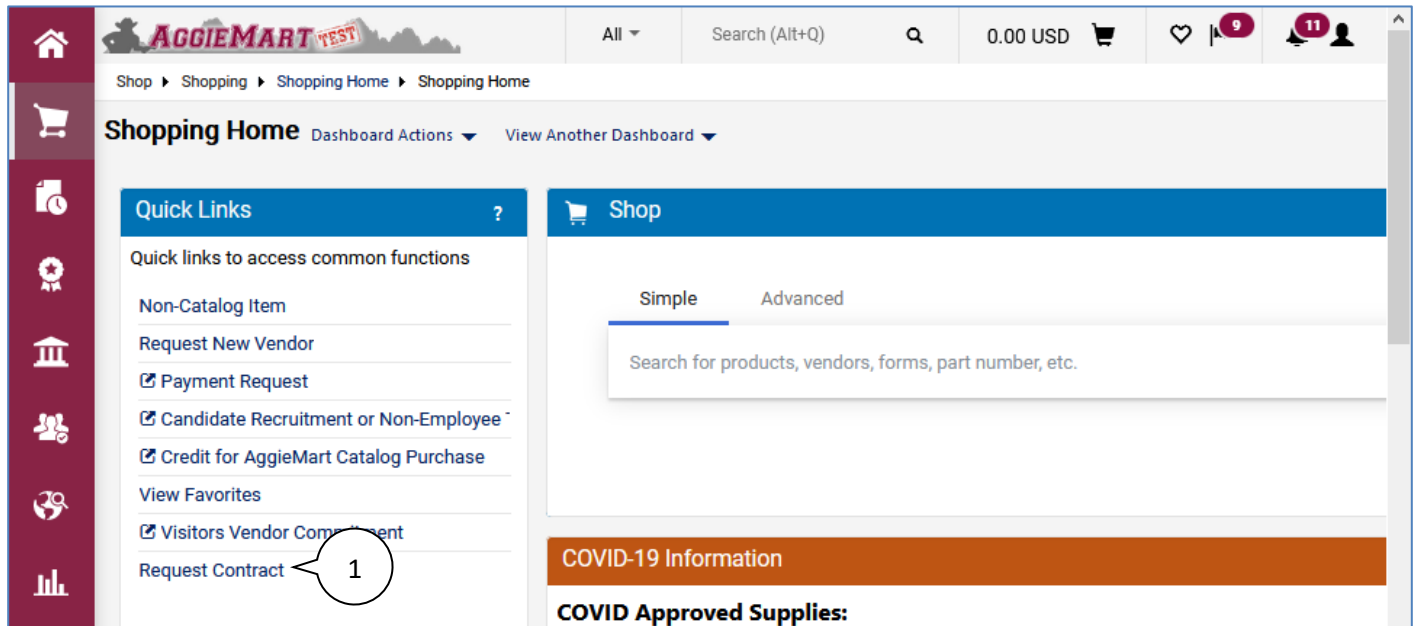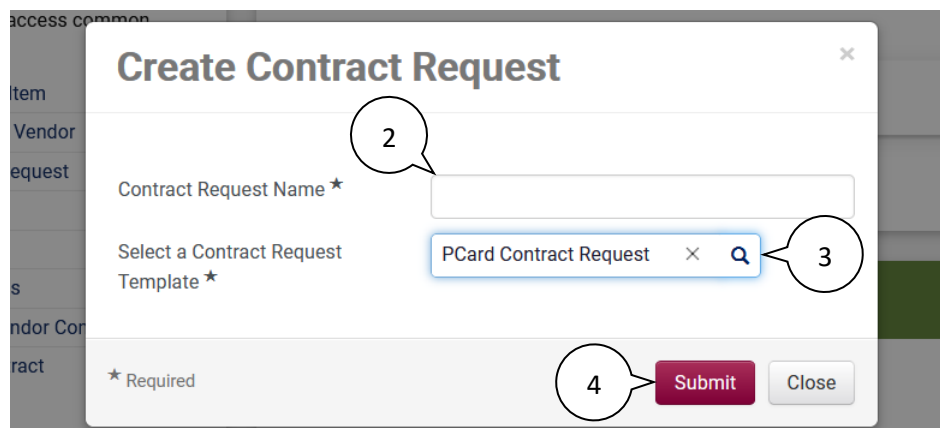## PCard Contract Request

All PCard purchases with associated agreements, terms and conditions, or PCard purchases that require a signature prior to purchase require use of PCard Contract Request in AggieMart.

Creating a PCard Contract Request

1. Click the **Request Contract** link in the **Quick Links** section of the AggieMart home page.

The **Create Contract Request** pop-up window will be displayed.

2. Enter a name for the contract in the **Contract Request Name** field. Contract Request Name should be **Vendor name – Dept. acronym**. *Example:* Riverside Technologies – DACC.
3. Select the **PCard Contract Request Template**.
4. Click **Submit**.

Team Tip: *Once submit is clicked, the system saves your PCard Contract Request as a Draft. If needed, you can stop working on it and return to it later.*
Keep in mind, the sooner you finish the draft request, the sooner it gets into the queue for review and processing!

*Refer to the **Draft Contract Requests** section of the AggieMart User Guide for more information on drafts.*

The **Instructions** screen will be displayed:

5. Read the **Instructions**. *Note: Follow the instructions carefully to avoid delays in processing.*
6. Click **Next**.

The **Details** screen will be displayed:

7. Review the **Details** screen. The **Contract Request Name** can be changed if needed.
8. Click the **Save Progress** [Save Progress] **button** → Click **Next** [Next ›] .

Attachments

9. Click the **Add Attachments** button. Attachments must be in the format indicated in the instructions.

10. Click on **Select files…** A file upload window will open.

11. Navigate to the documents associated with the contract. You can select multiple files by holding the Ctrl key while clicking.
12. Click **Open**.

13. Once the upload status reaches **100%** → Click **Save Changes**.
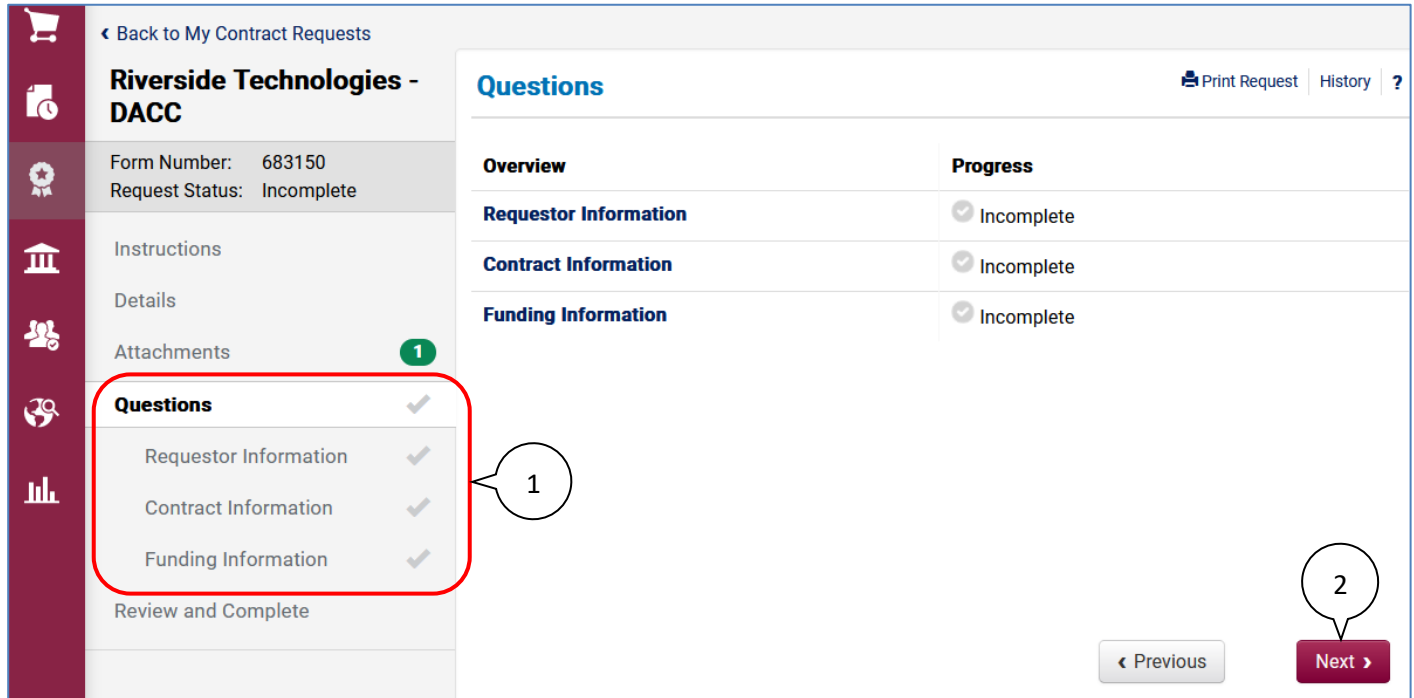

14. The uploaded file(s) will be listed in the **Request Attachments** area.
15. If needed, an attachment can be removed: click the **Actions** Actions ▼ **button** → Click **Delete** on the drop-down menu.
16. Click **Next**. The **Questions** screen will be displayed.

Questions Screens

Some of the questions have a **question mark** ❓ **icon** next to them. Clicking the icon will show information which may aid you with your answer. Questions with a **star** ★ are **Required fields**.

1. There are 3 **Questions** sections → **Requestor Information**, **Contract Information**, and **Funding Information**. Once a section is completed, the gray checkmark ✓ will turn green ✔ .
2. Click **Next**.

Questions – Requestor Information screen will be displayed:

3. Click the **Information has been attached checkbox** – this confirms that you attached all supporting documentation, including a quote.
4. Enter the **Department Information**.
5. Click the **Save Progress** `Save Progress` **button** → Click **Next** `Next ›` .

Questions – Contract Information screen will be displayed:

6. Enter the **Start Date** of the contract.
7. For the **End Date** → Click **Expires On** or **No Expiration**.

    ➡ If the answer is **NO EXPIRATION**: Skip to the next step.
    ➡ If the answer is **EXPIRES ON**: Additional questions will be displayed:
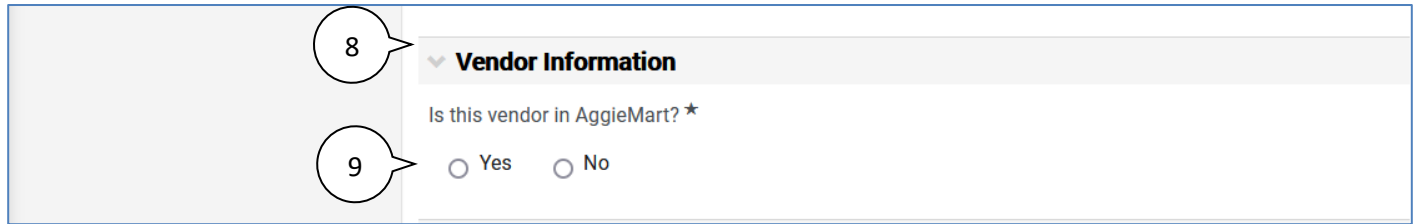
    a. Answer the **Expiration** and **Renewal** questions, if known.

8

Vendor Information
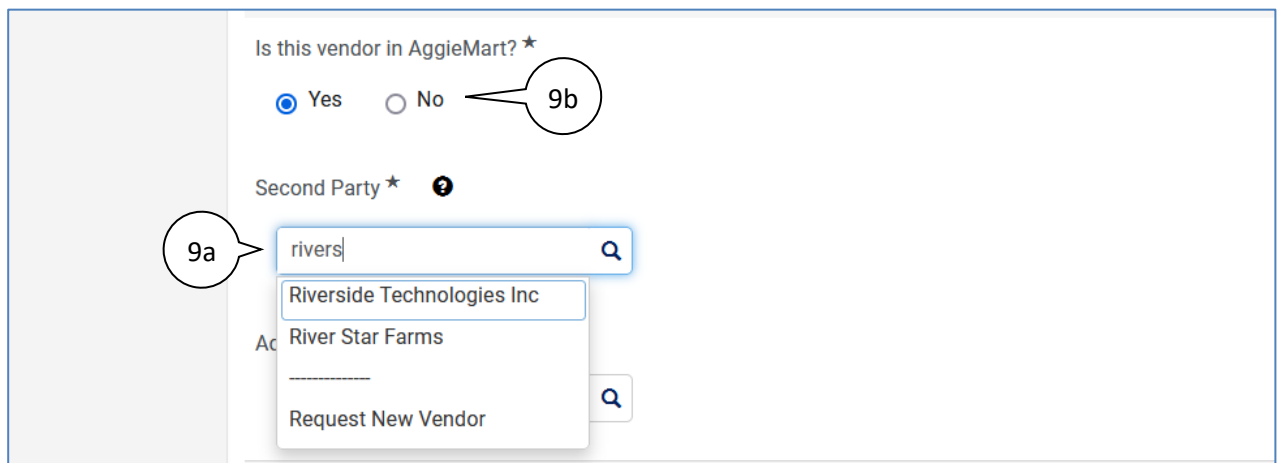
Is this vendor in AggieMart? *

9

○ Yes   ○ No

8. Scroll down to the **Vendor Information** section.
9. Click **Yes** or **No** for the question: **Is this vendor in AggieMart?**

    Note: If you are unsure if your vendor is in AggieMart or not → Click **Yes** → This will allow you to search for your vendor in AggieMart first.

➡ If the answer is **YES**:

Is this vendor in AggieMart? *

9b   ● Yes   ○ No

Second Party * ❓

9a | rivers | 🔍 |

Riverside Technologies Inc
River Star Farms

Request New Vendor

a. Enter part of the vendor name in the **Second Party** field and a list will appear → Click the vendor's name from the list to select it.
b. If you did **not** find the vendor in AggieMart → Change your answer to **NO**.

➡ If the answer is **NO**:

Is this vendor in AggieMart? ★

○ Yes   ● No

Provide Second Party Name ★   9c

Provide Second Party Phone Number ★   9d

Provide Second Party Email Address ★   9e

c. Enter the vendor name in the **Second Party Name** field.
d. Enter the vendor phone number in the **Second Party Phone Number** field.
e. Enter the vendor email address in the **Second Party Email Address** field.

⌄ Exception Information   10

11   Is this request for a purchase outside of the normal PCard guidelines? ★

○ Yes   ○ No

10. Scroll down to **Exception Information**.
11. **Is this request for a purchase outside of the normal PCard guidelines?** ➜ Click **Yes** or **No**.

➡ If the answer is **NO**: Skip to the next step.
➡ If the answer is **YES**: Additional questions will be displayed:

⌄ Exception Information

Is this request for a purchase outside of the normal PCard guidelines? ★

● Yes   ○ No

11a   Reason for request? ★

2000 characters remaining

a. Enter a **Reason for Request**.

b. Describe **What is being purchased**.
c. Provide a **Business Purpose** for the purchase.
d. Provide a reason for **Why can't a purchase order be issued**.
e. Enter the **Estimated purchase date**.

12. Scroll down to **Limit Increase**.
13. **Is request for a limit increase?** ➔ Click **Yes** or **No**.

➡ If the answer is **NO**: Skip to the next step.
➡ If the answer is **YES**: Additional questions will be displayed:

a.   Answer **Yes** or **No** for the additional questions:
- For a **Single Transaction purchase?**
- For a **Monthly Limit Increase?**

14. Click the **Save Progress** [Save Progress] **button** → Click **Next** [Next ›] .

Questions – Funding Information screen will be displayed:

1. Enter the **Total Contract Amount** in USD.
2. Enter the **(1) Index / Amount or Percentage**. *Example:* 123456 / 100%.
3. Use remaining fields if there are additional indexes for the purchase. Use box **(4) Additional Funding Information** to enter additional indexes if splitting more than 3 times or if you need to add additional information on the index(es) being used.
4. Click the **Save Progress** Save Progress **button** → Click **Next** Next › .

Review and Complete

1. If any required fields are incomplete → A message will be displayed.
2. A **gray** ⊘ Incomplete **checkmark** indicates which sections have incomplete required fields.
3. Click on the **section name** to open it → Complete the required fields as previously described.

4. All sections will have a **green** ✅ **checkmark** when completed.
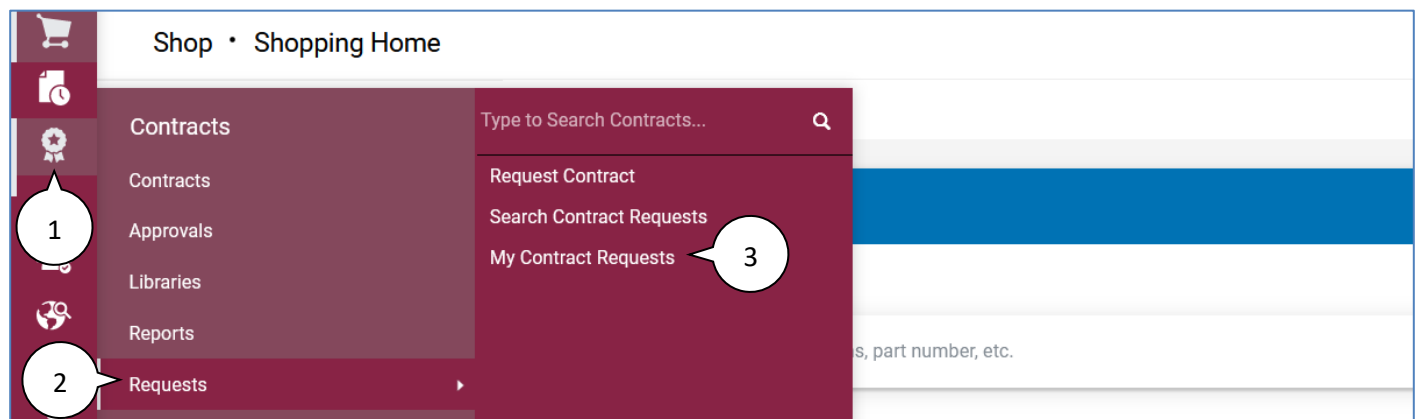5. Click the **Complete Request** button.
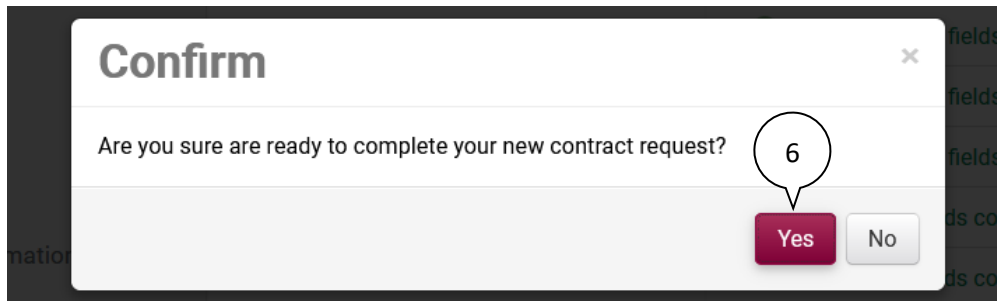
6. Click **Yes** to confirm (or **No** to return to the request).

The **My Contract Requests** screen will be displayed:

7. The new request is in your list of **My Contract Requests**.

Checking Contract Request Status

1. Click the **Contracts** 🎗 **icon** on the left side of the AggieMart home page.
2. Click **Requests**.
3. Click **My Contract Requests**.

The **My Contract Requests** screen is displayed.

4. Click on **Filter Contract Requests**.
5. Checkmark the boxes next to all **Status** options.
6. Click **Apply**.

7. Your **Contract Requests** are displayed. Both **Contract Requests** and **PCard Contract Requests** are displayed on the screen.
8. The **Request Status** and **Workflow Step** are shown.

Draft Contract Requests

1. Navigate to **My Contract Requests**. Refer to the previous section if needed.

2. **Draft Contract Requests** are identified as having a status of **Incomplete**.
3. To **Edit** or **Delete** a draft request:
    a. Click on the **Actions** [Actions ▼] **button** to the right of the draft. A drop-down menu appears.
    b. To resume working on the draft → Click **Edit**.
    c. To discard the draft → Click **Delete**.

When to Proceed with the PCard Purchase

After the PCard Contract Request has been reviewed and approved, Procurement Services will create a contract, obtain all signatures (if applicable) and fully execute the contract. An email notification will be sent to the contract requester informing them the contract approval workflow is completed and the contract is executed. The PCard purchase can now be made – a requisition is not needed. If any of your agreements that you submitted required Procurement Services signature, you must download the signed agreement from AggieMart and forward to the vendor with your PCard purchase.

Example email notification:
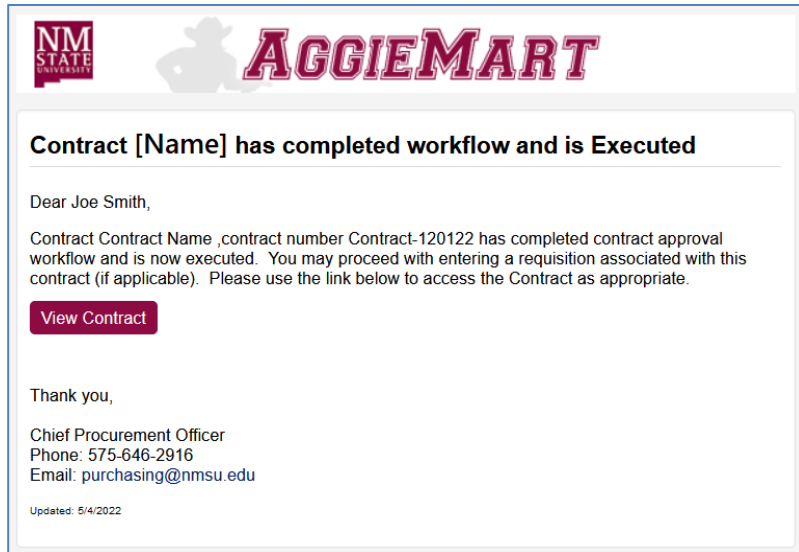
1. To view or download the contract → Click the **View Contract** button in the email notification. This will open the **Contract Summary** page.

2. Click the **arrow** > **icon** to expand the **Attachments** section.
3. Click the **Full Contract PDF** link → This will download the contract to your **Downloads folder**. **Note:** If your browser asks if you want to Open or Save the file, choose Save.

Guidelines for Reconcilers

During Wells Fargo PCard reconciliation, add the **Contract Number** to the **Description** field as outlined below. The contract requester would have received an email notification containing the number.

1. Start reconciliation of the PCard charge as you normally would.

2. The beginning text in the **Description** field needs to be **AMC** followed by the **Contract Number**. **Remember:** Special characters are not allowed.

   For example,

   > **Incorrect:** AMC ACES-PCARD-352 *(hyphens are not allowed)*

   > **Correct:**   AMC ACES PCARD 352 *(use spaces instead of hyphens)*

3. Enter a description of the charge after the contract number.
4. Continue the reconciliation process.