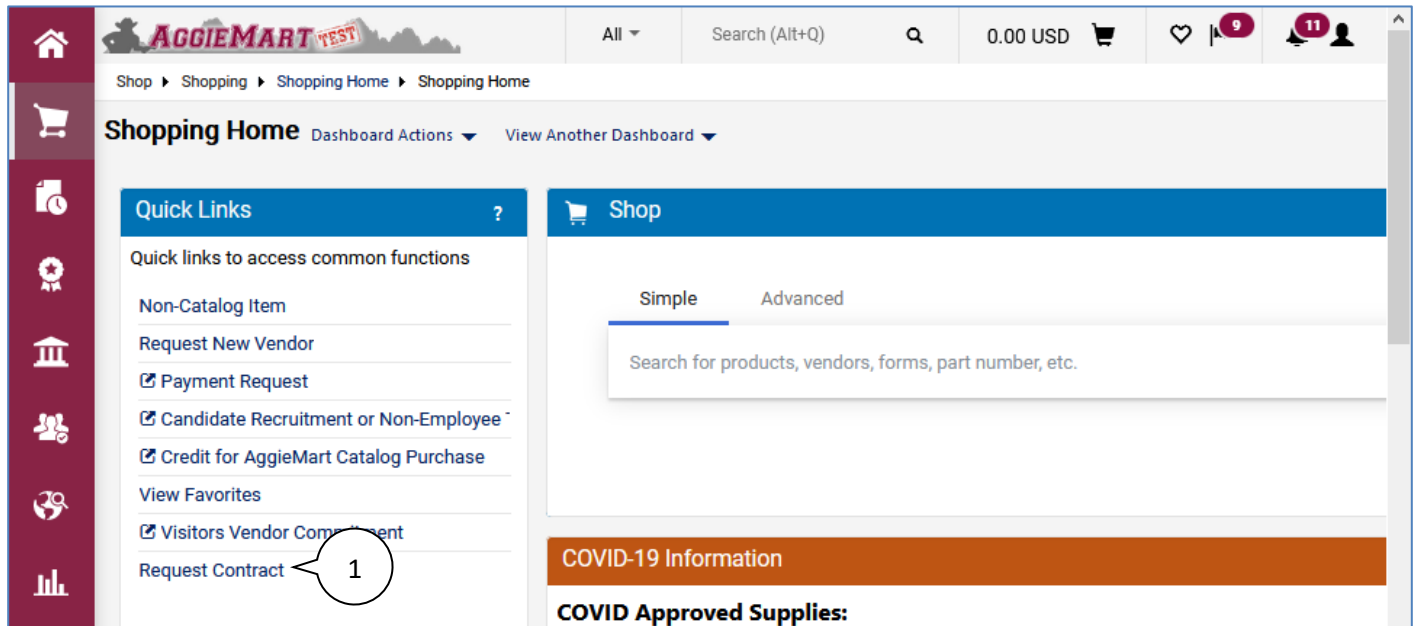


## PCard Contract Request

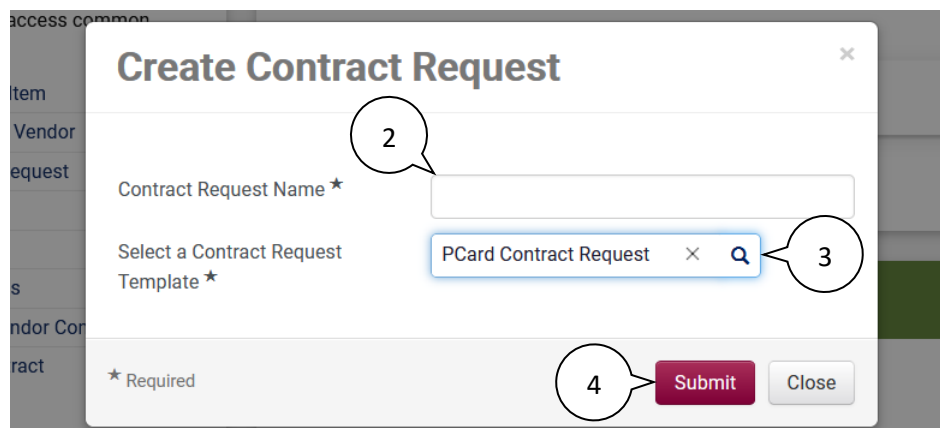
All PCard purchases with associated agreements, terms and conditions, or PCard purchases that require a signature prior to purchase require use of PCard Contract Request in AggieMart.

### 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

◀ Back to My Contract Requests

**Riverside Technologies - DACC**

Form Number: 683150  
Request Status: Incomplete

Instructions  
Details

**Attachments** 0

Questions ✓

**Attachments**

**Add Attachments** (9)

Print Request History ?

◀ Previous Next ▶

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

**Add Attachments**

Attachment Type ☒ File ☐ Link

File ★ **Select files...** (10) Drop files to attach, or browse.

Maximum upload file size: 50.0 MB

★ Required Save Changes Close

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

File Upload

← → ↑ This PC > Desktop Search Desktop

Organize New folder

Name	Date modified
Example contract (11)	12/3/2020 12:07 PM
Example file	12/3/2020 12:07 PM

File name: Example contract (12) All Files (\*.\*)

Open Cancel

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

12. Click **Open**.

**Add Attachments**

Attachment Type: ☒ File ☐ Link

File \*

Select files... Drop files to attach, or browse. Done ✓

Example contract 100% X

Maximum upload file size: 50.0 MB

★ Required

13 Save Changes Close

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

Back to My Contract Requests

**Riverside Technologies - DACC**

Form Number: 683150  
Request Status: Incomplete

Instructions  
Details

**Attachments** 1

Questions ✓  
Requestor Information ✓  
Contract Information ✓  
Funding Information ✓  
Review and Complete

**Attachments** Print Request History ?

Add Attachments

▼ Request Attachments

Attachment	Size	Actions
Example Contract.docx 14	11 KB 15	Actions ▼

16



Previous Next

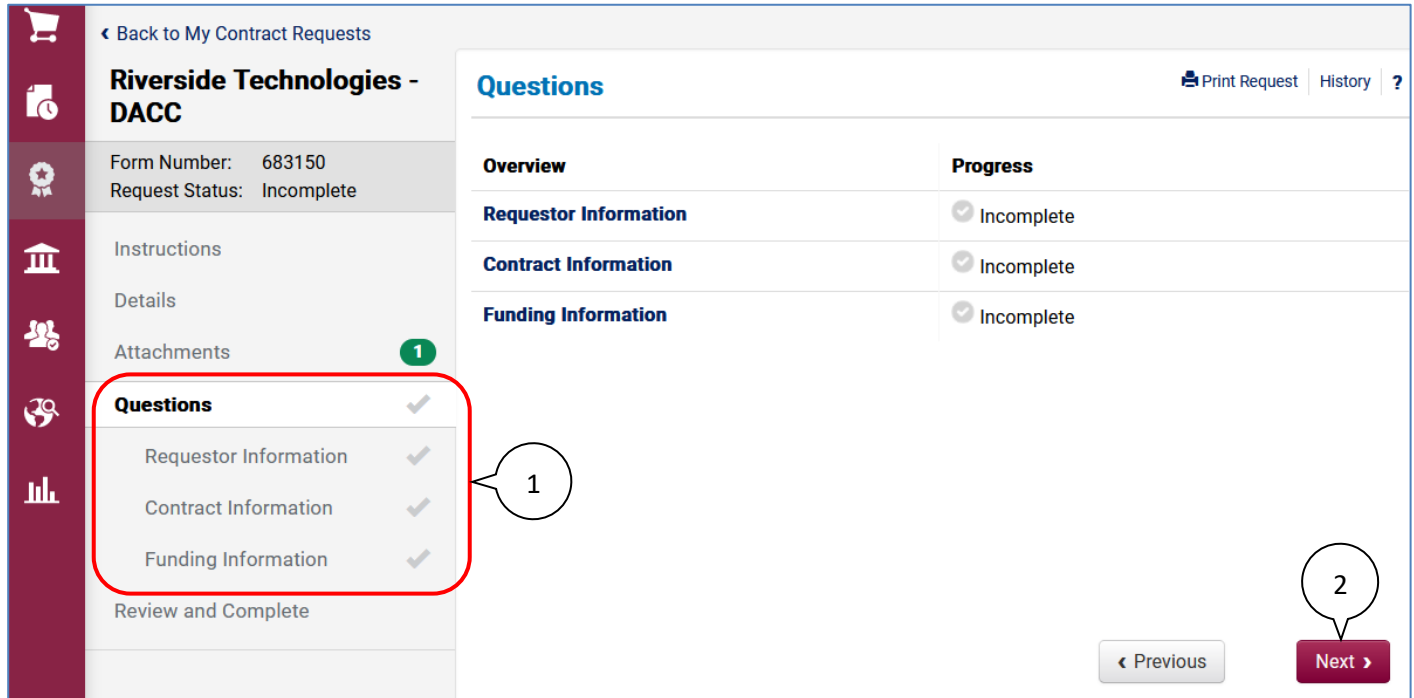
14. The uploaded file(s) will be listed in the **Request Attachments** area.

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**.






**Riverside Technologies - DACC**

Form Number: 683150  
Request Status: Incomplete



Instructions  
Details  
Attachments  
**Questions**   
Requestor Information   
Contract Information   
Funding Information   
Review and Complete

**Questions**

[Print Request](#) [History](#) [?](#)

Overview	Progress
<b>Requestor Information</b>	 Incomplete
<b>Contract Information</b>	 Incomplete
<b>Funding Information</b>	 Incomplete

[Previous](#) [Next](#)

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:

**Riverside Technologies-DACC**

Form Number: 649915  
Request Status: Incomplete

Instructions  
Details  
Attachments **1**  
Questions ✓

**Requestor Information** ✓  
Contract Information ✓  
Funding Information ✓  
Review and Complete  
Discussion  
Contract Request Workflow

**Questions - Requestor Information** Print Request History

**Department Information**

Have you attached all supporting documentation, including a quote? ★  
☐ Information has been attached **3**

Department Contact Name ★

Department Contact Email ★

Department Contact Phone ★

Department Head/Director Legal First and Last Name ★ **4**

Department Head/Director Official Title ★

Department Name ★

Cardholder Name as it appears on PCard ★

★ Required

Previous **Save Progress** Next **5**

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:

**Riverside Technologies - DACC**

Form Number: 683150  
Request Status: Incomplete

Instructions  
Details  
Attachments  
Questions  
Requestor Information  
**Contract Information**  
Funding Information  
Review and Complete  
Discussion

**Questions - Contract Information** [Print Request](#) [History](#) [?](#)

**On This Page**

- Start/End Date (2)
- Vendor Information (5)
- Exception Information (6)
- Limit Increase (5)

**Start/End Date**

Start Date ★ [?](#)

[mm/dd/yyyy](#)

☐ Update Start Date Upon Execution [?](#)

End Date ★ [?](#)

☐ Expires On ☐ No Expiration

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:

☒ Expires On ☐ No Expiration

[mm/dd/yyyy](#)

Auto-Renew

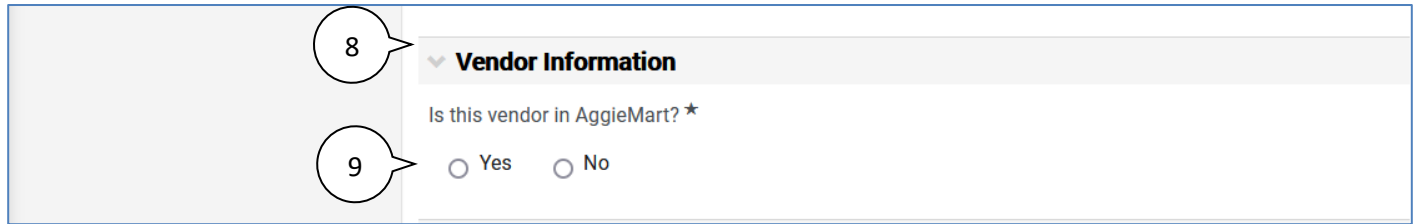
☐ Yes ☐ No

Renewal Term

Renewals Remaining

7a

a. Answer the **Expiration** and **Renewal** questions, if known.



8

▼ **Vendor Information**

Is this vendor in AggieMart? \*

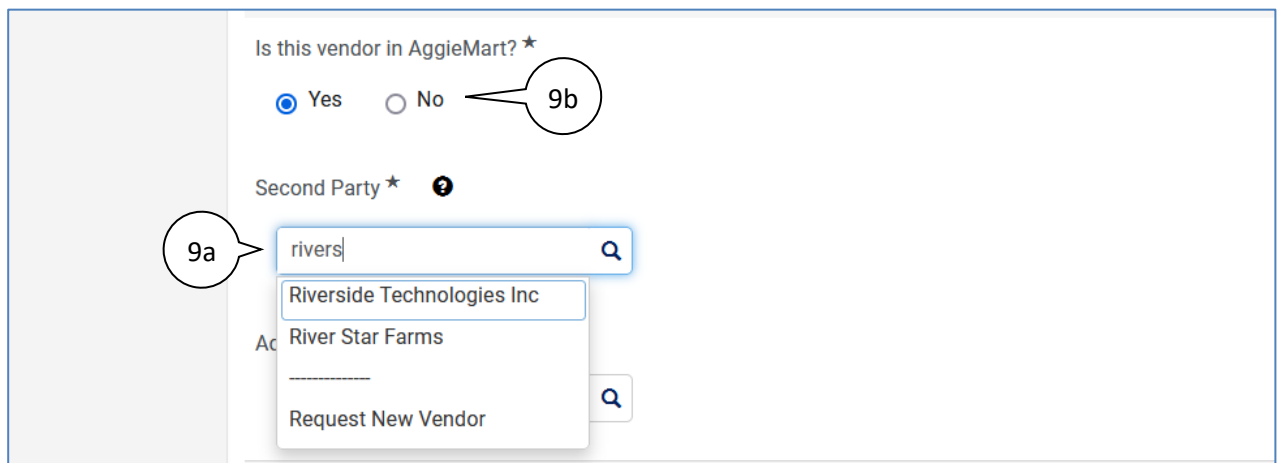
☐ Yes ☐ No

9

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? \*

☒ Yes ☐ No

9b

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.

11 **Exception Information** 10

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**.

11b What is being purchased? ★  
2000 characters remaining

11c What is the business purpose of purchase? ★  
2000 characters remaining

11d Why can't a purchase order be issued? ★  
2000 characters remaining

11e Estimated purchase date: ★  
mm/dd/yyyy

- 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 Limit Increase

13 Is request for a limit increase? ★

☐ Yes ☐ No

★ Required

◀ Previous Save Progress Next ▶

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:

▼ **Limit Increase**

Is request for a limit increase? ★

☒ Yes ☐ No

For a single transaction purchase? ★

☐ Yes ☐ No

For a monthly limit increase? ★

☐ Yes ☐ No

13a

a. Answer **Yes** or **No** for the additional questions:

- For a **Single Transaction purchase?**
- For a **Monthly Limit Increase?**

▼ **Limit Increase**

Is request for a limit increase? ★

☐ Yes ☐ No

★ Required

◀ Previous

Save Progress

Next >

14

14. Click the **Save Progress** **Save Progress** button → Click **Next** **Next >** .

**Questions – Funding Information** screen will be displayed:

**Riverside Technologies - DACC**

Form Number: 649915  
Request Status: Incomplete

Instructions  
Details  
Attachments  
Questions ✓  
Requestor Information ✓  
Contract Information ✓  
**Funding Information** ✓  
Review and Complete  
Discussion

**Questions - Funding Information** [Print Request](#) [History](#) ?

**Funding Information**

1 Total Contract Amount ★

2 (1) Index / Amount or Percentage ★

(2) Index / Amount or Percentage

(3) Index / Amount or Percentage

(4) Additional Funding Information  
2000 characters remaining

★ Required

◀ Previous **Save Progress** Next ▶

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

**Riverside Technologies - DACC**  
Form Number: 649915  
Request Status: Incomplete

1

Instructions

Details

Attachments

Questions

Requestor Information

Contract Information

Funding Information

Review and Complete

**Review and Complete**
Print Request History ?

All sections with required fields must be complete before you can complete your request

Section	Progress
Instructions	No Required fields
Details	No Required fields
Attachments	No Required fields
Questions	Incomplete
Requestor Information	Required fields complete
Contract Information	Required fields complete
Funding Information	Incomplete

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.

**Riverside Technologies - DACC**  
Form Number: 649915  
Request Status: Incomplete

1

Instructions

Details

Attachments

Questions

Requestor Information

Contract Information

Funding Information

Review and Complete

**Review and Complete**
Print Request History ?

Required fields complete

Section	Progress
Instructions	No Required fields
Details	No Required fields
Attachments	No Required fields
Questions	Required fields complete
Requestor Information	Required fields complete
Contract Information	Required fields complete
Funding Information	Required fields complete

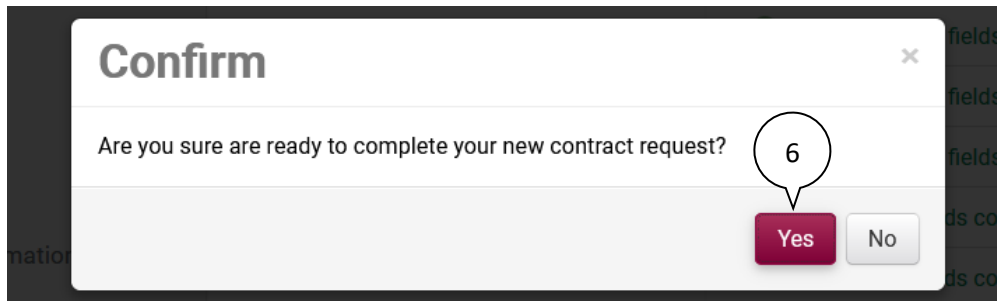
Discussion

★ Required

< Previous

Complete Request

4. All sections will have a **green** **checkmark** when completed.
5. Click the **Complete Request** button.



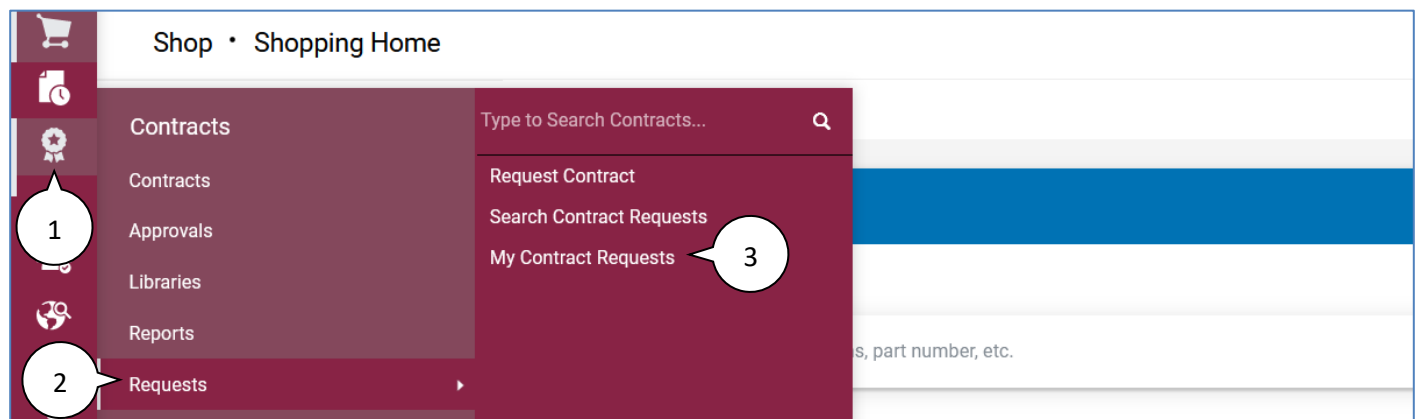
- Click **Yes** to confirm (or **No** to return to the request).

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

My Contract Requests								
<a href="#">Filter Contract Requests</a> <span>Create New Contract Request</span>								?
<span>7 Results</span> <span>10 Per Page</span>								
Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Sample request CS-02	Contract Request	chris test	Incomplete	–	–	2/7/2022 9:56 AM	2/7/2022 9:56 AM	Actions
Riverside Technologies - DACC	PCard Contract Request	chris test	Under Review	Shared Services Review	–	2/11/2022 2:35 PM	2/8/2022 10:05 AM	Actions

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

## Checking Contract Request Status



- Click the **Contracts** icon on the left side of the AggieMart home page.
- Click **Requests**.
- Click **My Contract Requests**.

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

**My Contract Requests** ?

▼ Filter Contract Requests

Create New Contract Request

Request Status ★

- ☒ Approved
- ☒ Incomplete
- ☒ Rejected
- ☒ Returned
- ☒ Under Review
- ☒ Completed

Apply

No matching contract requests found.

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

**My Contract Requests** ?

► Filter Contract Requests

Create New Contract Request

1 Results 10 Per Page ▼

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Sample request CS-02	Contract Request	chris test	Incomplete	–	–	2/7/2022 9:56 AM	2/7/2022 9:56 AM	Actions ▼
Example PCard contract request Z8	PCard Contract Request	chris test	Under Review	Shared Services Review	–	2/11/2022 2:35 PM	2/8/2022 10:05 AM	Actions ▼
CS Contract 1	Contract Request	chris test	Under Review	Shared Services	–	10/8/2021 5:21 PM	10/6/2021 10:52 AM	Actions ▼

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.

**My Contract Requests**

> Filter Contract Requests Create New Contract Request

Contract Request Name	Template	Requested By	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	
Sample request 1	Vendor Contract	Chris Stamm	Under Review	Procurement Review	–	3/3/2021 3:11 PM	2/26/2021 2:32 PM	3a
DACC Software	Vendor Contract	Sta	Incomplete	–	–	3/5/2021 10 AM	3/5/2021	3b 3c

Actions

- Edit
- Delete

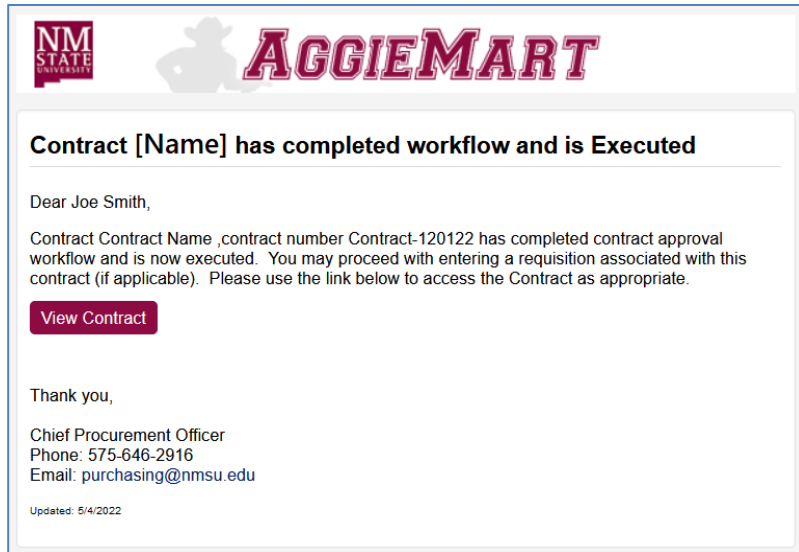
2. **Draft Contract Requests** are identified as having a status of **Incomplete**.
3. To **Edit** or **Delete** a draft request:
  - a. Click on the **Actions** Actions ▼ **button** to the right of the draft. A drop-down menu appears.
  - b. To resume working on the draft → Click **Edit**.
  - c. To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

**Executed: In Effect** This contract is in effect and has no expiration.

### PROC-PCARD-367

test cs

Type: PCard Contract Request  
2nd Party: Riverside Technolog...  
Dates: 5/20/2022 - No Expiration  
Version: Renewal 0, Amendment 0

**Total Contract Value (TCV)**  
TCV: -

➤ Lifetime Spend (USD)

### Contract Summary

Header		Dates And Renewal	
Contract Name ★	test cs	Start Date	5/20/2022 12:00 AM MDT
Contract Type ★	PCard Contract Request	End Date	No Expiration
Work Group ★	Provost Office (B00250)	<b>Contract Managers</b>	
First Party ★	Regents of New Mexico State University	Chris Stamm	cstamm@nmsu.edu +1 575-646-5618
Second Party ★	Riverside Technologies Inc		
Summary	No Text Entered		

2

**Attachments**

3

Contract was sent for approval on 5/20/2022.  
[Full Contract PDF](#) (178 KB)

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.

**Charges**

Viewing 1 to 1 of 1 Items

1.	Transaction Date	Posting Date	Merchant	Receipt Image	Receipt Submitted ‡	Amount / Original Currency
	03/01/2022	03/02/2022	Dnh Godaddy.com 480-5058855,AZ		<input type="checkbox"/>	189.98 USD
	General Ledger Code *		Description		Unit	
	738011 - MISC SUPPLIES PROCUREMENT CARD		AMC ACES PCARD 352. Continue with you description after the contract number.		FINANCIAL SYSTEMS ADMIN(Financial Sy)	
	INDEX		TELE #		CARDHOLDER COMMENTS	
	100783		575-646-1585			

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.