


Amending Contract Line Items



This document is a quick reference guide for Contract Managers managing line items in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: <https://spo.az.gov/>.

Price List items are to be modified and agreed to by the supplier using the bi-lateral amendment. This QRG demonstrates the step-by-step process and instructions for amendments involving price changes and adding a new line item.

Price Change

1. Log into APP.
2. Select **Browse Contracts** on the **Contracts** tab.
3. Locate the contract to amend.
4. Click the **Pencil**  icon to edit the contract.
5. Click the **Other Actions** drop-down arrow and select **Create an Amendment**.



6. Click **OK** to amend.
7. Navigate to the **Price List** left margin tab to select the item to amend.
8. Click the **Pencil**  icon for the item you wish to amend.
9. Scroll down to the **Item Price Sheet(s)** section.
10. Click the **Pencil**  icon of the line item.

The image shows a table titled "Item Price Sheet(s)". The table has three columns: "Label", "Supplier", and "Negotiated Price". The first row contains the text "Small, round Candy", "GOODYEAR TIRE & RUBBER CO", and "45.0000". A blue callout bubble with the number "10" points to a pencil icon next to the "Label" column.

Label	Supplier	Negotiated Price
Small, round Candy	GOODYEAR TIRE & RUBBER CO	45.0000

11. Verify the Item Tag field is blank.

- Change the **Validity End Date** to the last day of the current fiscal year to allow the receiver to enter and process payments on the current Purchase Orders.
- Add "**Expires XX/XX/XXXX**" in the Name field before the name to notify the requisition staff that the item/price will end.

Item description	Pricing
Supplier Reference No. ⓘ* <input type="text" value="CTR068583 - 1"/>	Validity Start Date <input type="text" value="11/1/2023"/>
Name* <input type="text" value="Expires 05/31/2024 Small, round Candy"/>	Validity End Date ⓘ <input type="text" value="6/30/2024"/>

- Click **Save & Close** to close the Item Price pop-up.
- Click **Save & Close** to close the Item pop-up.
- Click **Save** on the Contract page.
- Navigate back to the Price List left margin tab.
- The table refreshes with the new **Validity End Date** displayed in the name field.

Product Code ⓘ	Name	Summary	Product Reference ⓘ	Price	Currency
<input checked="" type="checkbox"/> <input type="text" value="CTR068583 - 1"/>	Small, round Candy Expires 05/31/2024	Small, round Candy Expires 05/31/2024		40.0000	USD

Add a New Line Item to a Contract

1. Working on the same amendment, navigate to the **Price List** left margin tab.
2. Click **Create an Item**.

The screenshot shows the 'Contract Items' section of a software interface. On the left, there is a navigation menu with 'Price list' selected, indicated by a blue circle with the number '1'. In the main area, there are two buttons: 'Add Proposal Items' and 'Create an Item'. The 'Create an Item' button is highlighted with a blue circle and the number '2'.

3. Complete the Product Information section, including **Item**, **Code** (next item number available CTR-XX), **Commodity**, **Type**, **Detailed Description**, and **Keywords**.




Complete the **Item** field with: "Effective XX/XX/XXXX" to identify the new pricing effective date.

The screenshot shows a form with two main sections: 'Product Information' and 'Detailed Description'. The 'Product Information' section contains several fields: 'Item' (with a value 'Effective 04/30/2024 Case of Cho...'), 'Code' (with a value 'CTR068583 - 2'), 'Existing Product' (a dropdown menu), 'Manufacturer Reference No.', 'Type' (a dropdown menu with 'Product' selected), 'Commodity' (with a value '50161813 - Chocolate or chocolate substitute candy'), 'Characteristics Group', 'Link to Manufacturer Catalog', 'Manufacturer', 'Amount Tolerance', 'Quantity Tolerance', 'Delivery Date Tolerance', and 'Product Tax Mode'. A blue callout box with the number '3' points to the 'Item' field, listing the fields to be completed: Item, Code, Type, Commodity, Detailed Description, and Keywords. The 'Detailed Description' section has a text area containing 'Case of 30 boxes of dark chocolate covered soft mint candies.' Below this is a 'Keywords' field with the value 'dark, chocolate, candy, mint, soft, sweet, peppermint, round'. At the bottom is a 'Summary' field.

4. Complete the **Summary** field (optional).
5. Scroll to the Item Description section.

- Complete the **Name** and **Supplier Reference No.** fields.

Item description




<p>Name*</p> <input type="text" value="Effective 04/30/2024 Case of Chocolate Cove..."/>	<p>Supplier Reference No. ⓘ*</p> <input type="text" value="CTR068583 - 2"/>
	
<p>Supplier*</p> <input type="text" value="GOODYEAR TIRE & RUBBER CO"/>	
<p>Punchout</p> <input type="text"/>	<p>Link to Item Catalog</p> <input type="text"/>
<p>Effective Date</p> <input type="text" value="10/31/2023"/>	<p>To (include)</p> <input type="text" value="10/31/2024"/>
<p>Contract</p> <input type="text" value="CTR068583 - Furniture 10/31/2023 Amendment #1"/>	
<p>Status</p> <input type="text" value="Draft"/>	



The name should match the Item and the Supplier Reference No. should match the Code as entered above.

- In the **Pricing** section, complete the **Validity Start Date** with today's date.
- The **Validity End Date** is to remain blank.
- Enter the retail price into the **Retail Price (tax excl)** field.
- Enter Unit of Measure (**UOM**).



Pricing

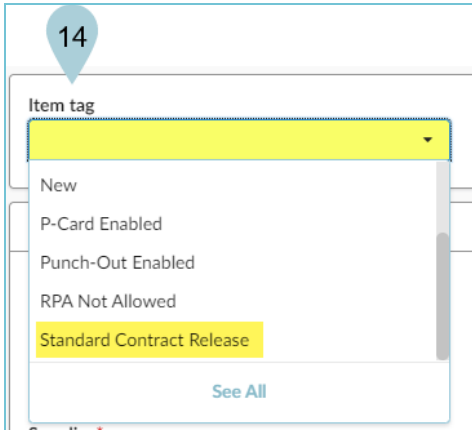
Status*	
<input type="text" value="Approved"/>	
<p>Validity Start Date</p> <input type="text" value="4/30/2024"/>	<p>Validity End Date ⓘ</p> <input type="text"/>
 	
Leaving Validity End Date Field Blank is Recommended (Header Validity End Date is Being Used)	
<p>Retail price (tax excl.)</p> <input type="text" value="45.00"/>	<p>Tax</p> <input type="text"/>
<p>Retail price (Incl. Tax)</p> <input type="text" value="45.0000"/>	<p>Currency</p> <input type="text" value="USD"/>
<p>Unit ⓘ</p> <input type="text" value="Case"/>	
<p>Other Units ⓘ</p> <input type="text"/>	
	

- Click **Save & Close**.



Steps 12-17 must be followed when an item must be tagged as a Standard Contract Release item. If not tagging an item, jump to step 18.

12. When a standard contract release tag is applicable, click the **Pencil**  icon for the item you wish to tag.
13. Navigate to the **Item Price Sheet** section and click the **Pencil**  icon.
14. From the **Item Tag** drop-down, select **Standard Contract Release**.



15. Click **Save & Close** on the Create/Modify price pop-up.
16. Click **Save & Close** on the Item pop-up.
17. The Standard Contract Release tag displays in the table.

<input checked="" type="checkbox"/>			CTR068583 - 2	Effective 04/30/2024 Case of Chocolate Covered Mints	Effective 04/30/2024 Case of Chocolate Covered Mints	45.0000	USD	Case	4/30/2024	10/31/2024		17
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18. Navigate to the **Add Document** left margin tab to add amendment documents.
19. Click **Add** to add the document.

Document Name	Version	Document Type	Status	Visible to Supplier	Download	Pending Validations	Last Modified Da
Insurance	V1	Insurance Documents	Approved	Yes			10/31/2023 1

20. Select the applicable document type link from the drop-down.

21. Fill in the **Document Name**.
22. Complete the **Effectivity** section.
23. Click the **Click or Drag to add files** link to add documents.
24. Click **Save & Close**.

The screenshot shows a form for creating a document. Callout 21 points to the 'Document Name' field containing 'Chocolate Covered Mints Pricing Information'. Callout 22 points to the 'Effectivity' section, which includes 'Effective Date' (4/30/2024), 'Expiration Date' (4/30/2025), and 'Notification Period' (Days). Callout 23 points to the 'Click or Drag to add files' link in the 'References' section, where a file named 'Price Item Update.pdf' is listed. Callout 24 points to the 'Save & Close' button at the top right of the form.

25. Click **Submit**.
26. Click **Send Contract for Approval**.

The screenshot shows the document management interface. Callout 25 points to the 'Submit' button in the document list. Callout 26 points to the 'Send Contract for Approval' button in the top navigation bar. The document list shows a document titled 'Chocolate Covered Mints Pricing Information' with a 'Submit' button next to it.

27. Your contract will go through the Approval process, including Internal and External approvals.
28. Once all approvals have been received, click the **Signed** button at the top of the page.



Review line items on the effective date to ensure the lines are active and functioning correctly.

Resources

Click the link below for more information on the contract creation processes in APP:

<https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/source-contract-qrgs-176>