

Completing Contract Header & Contacts Tabs

This document is a quick reference guide for users who will complete the Header and Contacts tabs on a draft contract 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/>.

Completing Header Tab

1. Select **Browse Contracts** from the Contracts drop-down menu.
2. Search for the draft contract you wish to edit and then click the Pencil icon to open it.
3. Navigate to the **Header** tab.
4. In the **Contract Header** section verify your Contract Label, Supplier, and Contracting Agency. A Contract Description and Project ID's can also be added to this section.

Contract Header

Contract ID

Label *

Contract Description

Supplier *

Contracting Agency *

Agency Project ID

Federal Project ID

5. In the **General Information** section, you will see the Type of contract, Status, and Amendment #. If you are creating a Statewide Contract the **Statewide Contract** checkbox must be checked.
6. The **Scope of Application** section will be completed with the information provided at contract creation, users can make changes if necessary.
Note: Users should select the highest org perimeter when assigning the Scope of Application. For example, if the contract is to be agency wide, just select the agency checkbox. Do not include every division, department or site. This will make the contract available to everyone in the agency selected.
7. In the **Additional Information** section users can add information regarding Co-Op Designation, Set-Aside, APC Exempt, IGA, and Estimated Contract Value.
8. Enter the Effective Date and Initial End Date in the **Validity** section. Do not enter a date in the Signature Date field. The Extended to Date field will also be left blank, a date will be entered into this field when the contract is renewed.

Validity

Evergreen? ⓘ

Signature Date

Effective Date *

Initial End Date * ⓘ

Extended to Date ⓘ

Maximum End Date

Notice to Proceed Date

- In the **Review & Renewal** section enter the Renewal Type, Renewal Period, Renegotiation Period, and Notification Duration.

Review & Renewal Schedule

Renewal Types

Renewal Period (months) ⓘ

Renegotiation Date ⓘ

Renegotiation Period (months) ⓘ

Notification Date ⓘ

Notification Duration (months) ⓘ

- Once complete, click the **Save** button at the top of the page.

Completing Contacts Tab

- Select **Browse Contracts** from the Contracts drop-down menu.
- Search for the contract you wish to edit and then click the Pencil icon to open it.
- Navigate to the **Contacts** tab.
- Click the **Select Existing Contact** button to add Supplier Contacts.

Supplier Contacts

Select Existing Contact

- To add a contact(s), click on the checkbox to the left of the contact name.
- To close the Pop-up click the X icon.

Supplier contacts ✕ 6

Keywords Supplier

Restrict search to current supplier's hierarchy

Filters Restrict search to current supplier's hierarchy: ✓ ✕

<input type="checkbox"/>		Position	Phone	Cell Phone	Email	Other assigned suppliers
<input checked="" type="checkbox"/>	Supplier 4 AZ Training	CEO	602-555-1234		aztrain4@noemail.gov	State of AZ Training Supplier ...

- The contacts selected will be added to the contract.

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8. To add Internal Team users to your contract, enter the name of the user you wish to add in the **Select User(s)** dropdown.
9. Next, select the users from the dropdown.
10. Once the users have been added to the table, assign them a profile from the **Profiles** dropdown.
 - Contract Owner - User will have full view and edit access to the contract.
 - Contract Project Team - User will have view and limited edit access to the contract.
 - Contract Project Team (View Only) - User will only have view access to the contract.

The screenshot shows the 'Internal team' management interface. At the top is a search bar labeled 'Select user(s)' with a red callout box containing the number 8. Below this is a table with three columns: 'Email', 'Profiles', and 'Contact'. The first row shows the email 'john.jimenez@azdoa.gov', a dropdown menu for 'Profiles' (highlighted with a red callout box containing the number 10), and the name 'JIMENEZ John'. The second row shows the email 'adaproc99@noemail.gov', a dropdown menu for 'Profiles' with 'Contract Owner' selected, and the name 'PROCUREMENT TRAINER ADA'.

11. Once complete adding contacts, click the **Save** button.