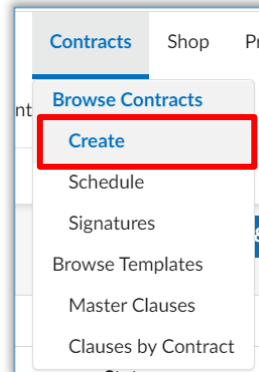


Step-by-Step Instructions for Creating a Real Estate Contract

- ▲ Real Estate contracts are typically created as a standalone record. Users cannot retroactively link a solicitation to a contract. For instructions on how to create a contract from a solicitation or “flip a solicitation”, please consult the Creating and Managing Contracts Learner Guide..

Log in to Ohio|Buys. From the Main Menu Navigation Bar, click **Contracts** and then select **Create** from the drop-down menu.



In the General Information box, populate the mandatory **Contract Type** and **Contract Sub-Types** fields with **Real Estate** and **Commercial Lease Agreement** respectively.

A screenshot of the 'General information' form. The 'Contract ID' field is empty. The 'Status' dropdown is set to 'Draft'. The 'Contract Type' dropdown is set to 'Real Estate' and the 'Contract Sub-Type' dropdown is set to 'Commercial Lease Agreement'. Both dropdowns are highlighted with a red rectangle. Below these fields are three checkboxes: 'Bypass Negotiation?' (checked), 'Override Contract' (unchecked), and 'Public?' (checked).

- ▲ Make sure that the **Bypass Negotiation** checkbox is engaged for all Real Estate contracts and amendments.

Step-by-Step Instructions for Creating a Real Estate Contract

a) In the Contract Header box, populate the mandatory fields:

- **State Contract Number:** This is the contract number that will be in OAKS.
 - ▲ By default this field will populate with the CTR Number generated by Ohio|Buys. Make sure to update this field with the correct Real Estate contract number whenever creating or amending a Real Estate contract.
- **Name:** This will be the contract name.
- **Contracting Entity:** This field should be set to **DAS-Administrative Services**.
- **Market Type:** This field should be set to **OPEN: Open Solicitation**.
- **Contract Owner:** This field should be entered as **DAS**.
- **Catalog Enabled:** This field should be set to **No Catalog**.

The screenshot shows a 'Contract Header' form with the following fields and values:

Contract Header	
State Contract Number *	Index Number
RE-124123	
Name *	Contract Responsible
DOT Franklin Facility	
Contracting Entity *	Contract Owner *
DAS-Administrative Services	DAS
Supplier	Bill Type *
	Manual Bill
Minimum Contract Purchase Amount	Catalog Enabled *
	No Catalog
Market Type *	Request to Purchase
OPEN: Open Solicitation x	

- b) Populate the **Supplier** field with the Contractor's name associated with the contract record. The hyperlink icon links to the Supplier's record in Ohio|Buys.
- c) Populate the remaining non-mandatory fields as necessary
- ▲ For a complete list of contract fields, refer to the Contract Field Guide in the Creating and Managing Contracts Learner Guide.

Step-by-Step Instructions for Creating a Real Estate Contract

In the Contract Scope box, choose the mandatory **Participating Organizations** and **Commodities** field:

- a) **Participating Organizations field:** Select the organization the contract is for, which is typically the agency utilizing the commercial lease.
 - 1) To most effectively choose the Organization, click the **Selector** (▾) icon and then select **See All**. A pop up will appear with the organizational hierarchy.
 - 2) Under Organizational Hierarchy, click the **Expand** (⊕) icon next to OHIO. If you are creating an agency contract, click the **Expand** (⊕) icon next to State Agencies.
 - 3) Click the Hand (🖱) icon to select all values beneath the listed organization or click the Checkbox (☐) icon next to each organization to select an individual or a few organizations.
 - 4) Click the **X** (✕) icon once you have selected your organizations to move on.

- b) **Commodities field:** Set this field to **80130000 – Real Estate Services**.

In the **Contract Dates** section, populate the mandatory fields:

- a) **Effective Date** indicates the contract start date. Note that the effective date cannot be back-dated prior to the date that the contract was created in Ohio|Buys. If a contract needs to be back-dated, please create an OSS help desk ticket.
- b) **Original End Date** field with the original or initial contract end date.

Step-by-Step Instructions for Creating a Real Estate Contract

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- a) The **Expiration Notification** section contains information about when an expiration notification will notify the contract team to review the contract for potential renewal, which usually requires an amendment. Users can enter a digit into the **Notification Period** field to represent the number of months before the **Current End Date** (and if the **Current End Date** isn't populated, then before the Original End Date), that an e-mail notification will be sent. The **Notification Date** field is automatically populated with the exact day that is 6 months before the **Current End Date** or **Original End Date**.
- b) The **Termination** section is not mandatory and is only used if and when the contract needs to be terminated prior to the **Original End Date** or **Current End Date**.
- ▲ For more information on how to use these fields, refer to the Contract Field Guide in the Creating and Managing Contracts Learner Guide.

The screenshot shows two side-by-side form sections. The left section, titled 'Expiration Notification', contains two fields: 'Notification Date' with a calendar icon and 'Notification Period (in months)' with a text input field. The right section, titled 'Termination', contains two fields: 'Termination Date' with a calendar icon and 'Termination Justification' with a large text area.

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Click **Save**.

Once you click **Save**, the following tabs on the left side of the page become visible: Overview, Contract tree view, Contacts, Documents, Price List, Orders, Workflow, Evaluation, Dealers, Subcontractors, Supplier Change Request, Exceptions, Usage Report, Payment, and Confidential Documents.

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Navigate to the **Contacts** tab.

The screenshot shows a form titled 'Internal team'. It has a 'Select user(s)' dropdown menu. Below this is a table with three columns: 'Email', 'Profile', and 'Contact'. The 'Email' column contains a trash icon and the email address 'RealEstateContractAnalyst15@mailinator.com'. The 'Profile' column contains a dropdown menu with 'Responsible (Contract)' selected. The 'Contact' column contains the text 'TRAINING RealEstateContractAnalyst15'.

The "Internal team" lists all state employees, who can be added as team members to view and approve the details of this contract. To add internal contacts:

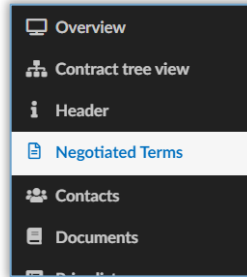
- 1) Type the internal contact's name in the **Select Team** field. (This should be entered as "Last Name, First Name")
- 2) Select their name from the drop-down menu.

▲ You should add any other real estate users that might need to amend or terminate the contract to the contract team with the **Contributor/SME** role.

Step-by-Step Instructions for Creating a Real Estate Contract

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Navigate to the Negotiated Terms tab.



The fields on the Negotiated Terms tab are not mandatory, but many of them have downstream impacts to the Purchasing process.

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A screenshot of a web form titled 'Negotiated Terms'. The form is divided into two main columns. The left column contains fields for 'Estimated Contract Value', 'Currency' (set to USD), 'Contract Not to Exceed', 'Revenue Share %', 'Fund Code' (with a help icon), a toggle for 'Only Accept Pcard Orders', and several text areas for 'Delivery Terms', 'Warranty Terms', 'Complaint Process', 'Return Process', and 'Choice Criteria'. The right column contains a dropdown for 'Payment Terms' (set to 'Due Immediately'), a dropdown for 'Additional Payment Terms', a dropdown for 'Payment Type' (set to 'Check'), a text area for 'Renegotiation Threshold', a text area for 'Price Terms', a text area for 'Invoicing Terms', a text area for 'Penalties', and another text area for 'Payment Terms'.

Below are key fields that have downstream impacts for Real Estate contracts.

a) Contract Not to Exceed: This field is important if there is a spend ceiling for the contract. Purchases against the contract that exceed the ceiling will be blocked.

▲ If adding additional funds to a contract will increase this value, you must create an amendment and update this field.

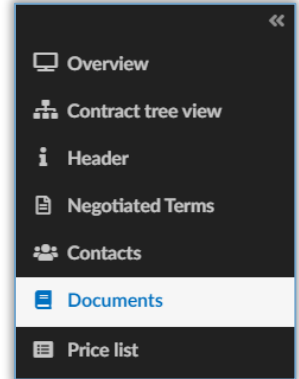
b) Payment Terms: The value in this field transfers to OAKS. Will default to “due immediately” if no other value is selected.

For a full guide to leveraging contract fields, refer to the Contract Field Guide contained in the Creating and Managing Contracts Learner Guide. 5

Step-by-Step Instructions for Creating a Real Estate Contract

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The Documents tab can be used to house supporting documents for a contract. To upload the lease associated with the contract, navigate to the Documents tab.



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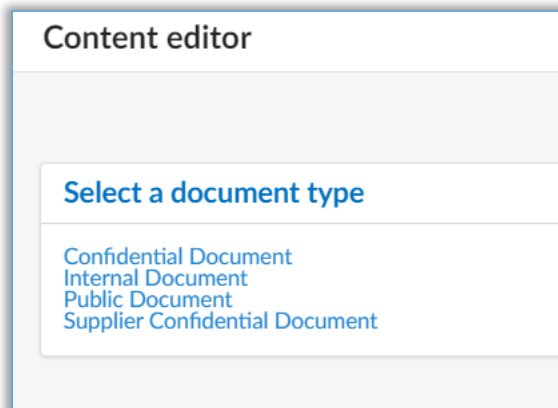
Under the Supplemental Documents section, click **Create Document**.

[Create Document](#)

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Select the **Supplier Confidential Document** document type.

- ▲ These documents are only visible to the contract team in the confidential documents tab and Suppliers on the contract. An example of this would be floor plans of building that should only be visible to the internal and supplier contacts on the contract, not all State users with access to the contract.
- ▲ Additional documents can also be uploaded to be viewed by internal state users by selecting the **Internal Document** document type. Note that these documents will appear directly on the Documents tab.



Step-by-Step Instructions for Creating a Real Estate Contract

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Complete the mandatory fields.

- a) Title: Insert the title of the document
- b) Version: The version number of the contract

Title	Information
Title *	Status
<input type="text"/>	Approved
Version * ⓘ	<input type="button" value="Click or Drag to add files"/>
<input type="text"/>	
Summary ⓘ	Contract
<input type="text"/>	ALB Roby2 082120

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Complete the non-mandatory fields as necessary.

- a) Summary: A thorough description of the document can be added here
- b) Attachments: The document should be uploaded here

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Click **Save & Close**.

<input type="button" value="Save as draft"/>	<input type="button" value="Save & Close"/>	<input type="button" value="Publish"/>	<input type="button" value="Delete"/>
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Click **Submit**.

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Click **Approve**.

The contract will be sent to OAKS for processing. Once it is processed by OAKS, it will be active for agencies to purchase against in Ohio|Buys.

Step-by-Step Instructions for Amending a Real Estate Contracts

For most amendment types, the process for updating a Real Estate contract is the same process outlined in the Creating and Managing Contracts Learner Guide. However, in order to amend a Real Estate contract to account for a change in property ownership, users must complete the following additional steps.

- ▲ Prior to amending or cloning a contract, make sure that you are set as the **Responsible** user in the **Contacts** tab of the original contract record. For more information on managing contract contacts, please consult the Creating and Managing Contracts Learner Guide.

1. Open the contract that needs to be amended and click **Clone Contract**. Click **OK** in the prompt when it appears.

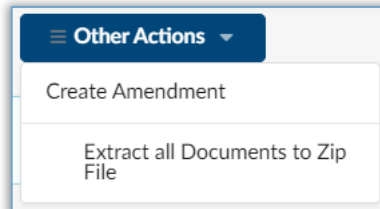
A blue rectangular button with the text "Clone Contract" in white.

2. Update the necessary fields in the new contract record. (State Contract Number, Supplier, a revised lease document, etc.)

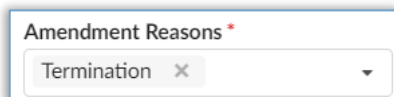
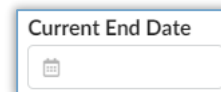
- ▲ Remember to check the **Bypass Negotiation** checkbox.

3. Submit the new contract using the same process outlined in this job aid.

4. Return to the original contract and click **Other Actions -> Create Amendment**. Click **OK** in the prompt when it appears.



5. Select **Termination** for the Amendment Reason and the **Current End Date** field to be today's date.

A screenshot of a dropdown menu labeled "Amendment Reasons *". The selected option is "Termination", which is displayed in a light gray box with a small "x" icon to its right.A screenshot of a date selection field labeled "Current End Date". It features a calendar icon on the left and a text input area.

6. Update the remaining mandatory and optional fields as necessary. When you are finished, click **Submit**. Then click **Approve**.

A green rectangular button with the text "Submit" in white.A green rectangular button with the text "Approve" in white.

- ▲ Remember to check the **Bypass Negotiation** checkbox in the terminated record.