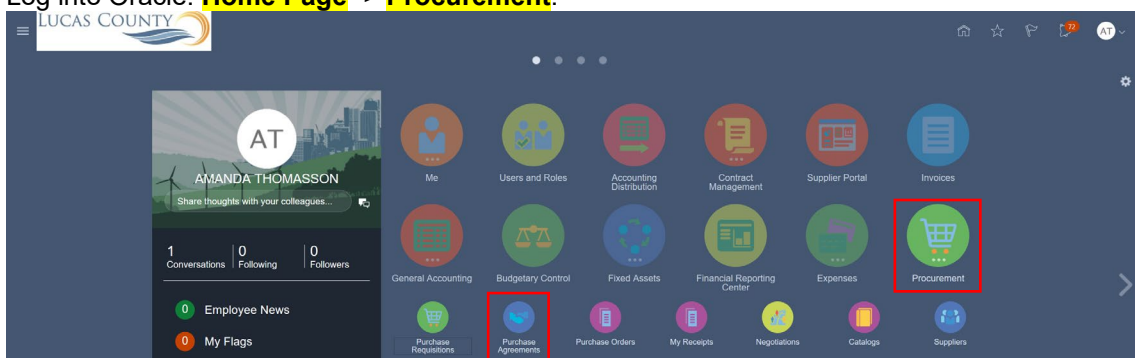
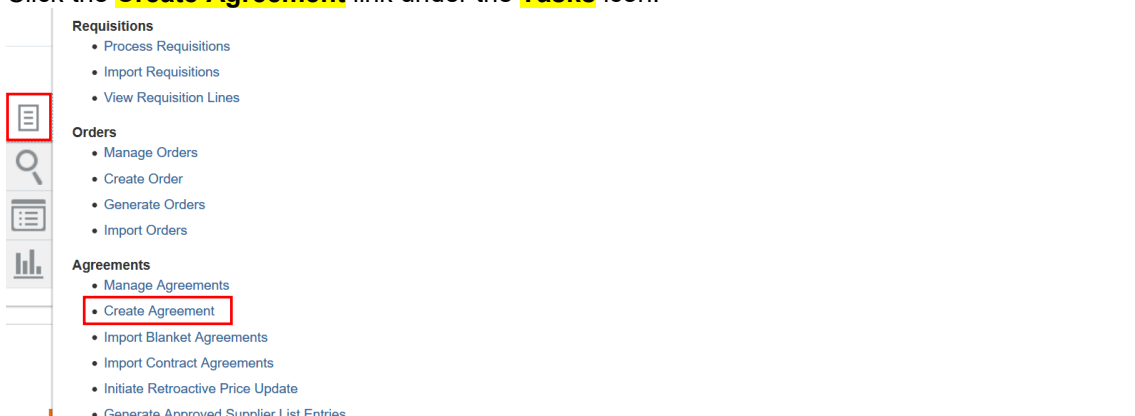



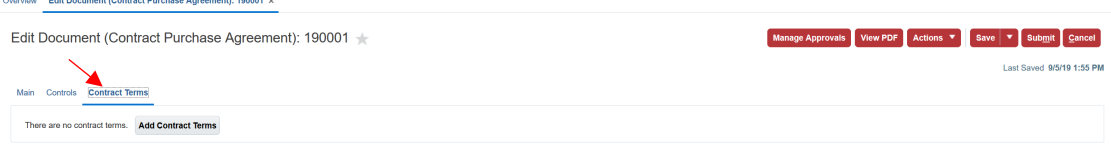
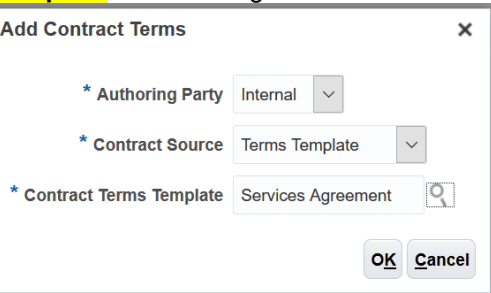
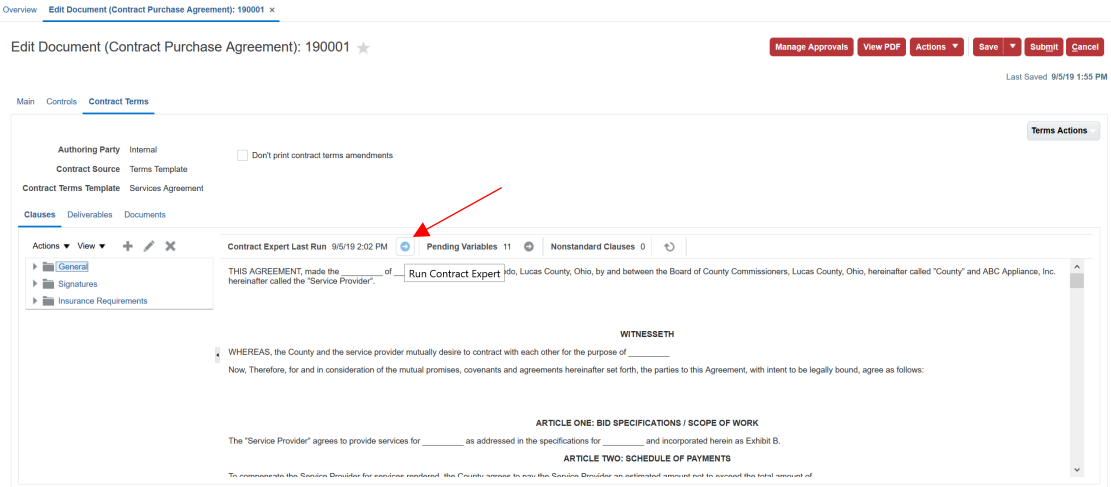
Apply Terms Template to Purchasing Document

Audience: Procurement Managers, Procurement Contract Administrators, Buyers

Purpose: Terms templates reside in the Terms Library, and can be used to insert boilerplate terms and conditions into contracts during contract authoring. Contract Expert rules are made up of questions and responses that drive clause selection, terms template selection, and business policies and standards. This job aid will assist you with applying a terms template to a purchasing document, updating variables, deliverables, running the Contract Expert, and taking required action.

Step	Action
1	Log into Oracle. Home Page -> Procurement. 
2	Click the Purchase Agreement icon.
3	Click the Create Agreement link under the Tasks icon. 
4	Click the Style list.
5	Click the Contract Purchase Agreement list item. 
6	Click into the search fields and enter search criteria. In this example, we entered "abc" into the Supplier field, and clicked Search .
7	Click the Supplier from the list.

8	Click in the Supplier Site field.
9	Select a Supplier Site from the drop down. Supplier Site: ORDERING01
10	Click the Buyer field. Accept Default Buyer.
11	
12	Click the Select Start Date button. Enter the appropriate start date.
13	Click the Select End Date button. Enter the appropriate end date.
14	Click in and enter information into the Agreement Amount field.
15	Click in and enter information into the Description field.
16	

17	<p>Click the Contract Terms tab.</p> 
18	<p>Click Add Contract Terms.</p>
19	<p>Select Authoring Party: Internal, Contract Source: Terms Template, Contract Terms Template: Services Agreement.</p> 
20	<p>Click the OK button.</p>
21	<p>Click the Run Contract Expert icon.</p> 
22	<p>Enter Variable Values. Click Next.</p>

Run Contract Expert ✕

1 —
 2 —
 3

Enter Variable Values Answer Questions Review Suggested Clauses

Run Contract Expert: Enter Variable Values

View ▼ Format ▼ Freeze Wrap View All variables ▼

Name	Description	Value	Clauses
Agreement C...	Agreement Commencement Date	9/5/19	
Agreement D...	Agreement Day	Thursday	
Agreement E...	Agreement End Date	9/30/21	
Agreement ...	Agreement Month	September	
Agreement P...	Agreement Purpose	Appliance Service	

Back Next Save and Close Finish Cancel

23 **Answer Questions**, if applicable. Click the **Finish** button.

Run Contract Expert ✕

1 —
 2 —
 3

Enter Variable Values Answer Questions Review Suggested Clauses

Run Contract Expert: Review Suggested Clauses

View ▼ Format ▼ Freeze Wrap

Insert into document	Clause Title	Description	Section	Clause Details
No data to display.				

Back Next Save and Close Finish Cancel

24 Click the **Refresh** icon to populate the variables into the clauses.

<p>25</p>	<p>Select Deliverable tab and click the + icon to add a deliverable.</p>
<p>26</p>	<p>Enter the following:</p> <p>Name: Review Terms</p> <p>Description: Review Contract Terms</p> <p>Type: Contractual</p> <p>Responsible Party Type: External</p> <p>External Party Contact: (Search and select a contact)</p> <p>Fixed Date: (Select a date greater than today's date)</p> <p>Click OK.</p>
<p>27</p>	<p>Click Save.</p>
<p>28</p>	<p>View the PDF and see that the Clause(s) is added and contains Variable information.</p>