



### **TCM: Contract Notifications**

Notifications are set up to "alert" or notify contract managers, stakeholders, or external contacts of important events related to a contract, such as start and end dates, or when budget tiers are reached.

Advance notifications can be set up for start dates, end dates and renewal dates, so that contract managers or administrators can act prior to an event occurring. For example, advance notification of an expiring contract could give a contract manager time to prepare a replacement.

#### **Sourcing Director Contracts**

For contracts created from a Sourcing Director Event, a Sourcing Event Advanced Notice section is displayed on the Notification page and can be set up to inform sourcing event managers that a contract created from a sourcing event is up for renewal or about to expire. The notification provides an option to re-create the sourcing event by copying the original sourcing event to create a new sourcing event.

#### **Set Contract Notifications**

Notification work a little differently for contract managers and stakeholders (internal users), and external contacts:

Contract Managers and Stakeholders (internal users) - These users must enable the corresponding notification preference on their user profile (Notification Preferences > Contracts) and have access to the contract before they will receive the notifications selected on this page.

External Contacts - When a contract is configured to send emails to external contacts, the emails are automatically sent to the email addresses specified. External contacts cannot opt out of the notifications, but you can remove them from the list if they no longer need to receive the emails.

## Steps

1. Navigate to **Contracts > Contracts > Search Contracts** and open the appropriate contract for editing.

The screenshot displays a contract management interface. At the top, a status bar indicates the contract is "Executed: In Effect" and provides the end date: "This contract is in effect through the end date of 1/29/2020 at 11:59 PM EST." A "Contract Actions" dropdown menu is visible in the top right corner.

The main content area is divided into several sections:

- Contract Summary:** This section contains a table with contract details:
 

Header		Dates And Renewal	
Contract Name *	test 8.27.2019	Start Date	9/21/2019 12:40 PM EST
Contract Type	Purchase of Goods or Services	End Date	1/29/2020 11:59 PM EST
Work Group *	Procurement	Auto-Renew	✗
First Party *	The Florida International University Board of Trustees	Contract Managers	
Supplier Name *	HOME DEPOT	Kesha Shrestha	keshrest@fiu.edu
Summary *	test		
- Summary:** A sidebar menu on the left lists various contract components with status indicators:
  - Header: ✓
  - Commodity Codes
  - Alternative Language (Do ...): 0
  - Attachments: 5
  - Obligations: 0
  - Review Rounds: 0
  - Approvals
  - eProcurement Setup
  - Budget and Spend
  - Applies To
- Additional Details:** A list of expandable sections including Attachments, eProcurement, Budget, and Spend, Applies To, Visibility, and Goods and Services.

A "Next >" button is located at the bottom right of the interface.

2. In the left menu click **Notifications**.

Comments	0
Communication Center	0
Users and Contacts	
<b>Notifications</b>	
Contract Family	

**Notifications**

Who should receive each notification type?

Notification Type	Contract Managers		Stakeholders		External Contacts
	Contract	Work Group	Contract	Work Group	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget Exceeded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Percentage Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date - Advance Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date - Advance Notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date - Advance Notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Advance Notice Settings**

Leave a field blank to turn off that advance notice.

Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)
Start Date	<input type="text"/>		

3. Under the **Notifications** heading, choose the notifications that will be sent to contract managers, stakeholders or external contacts on this contract by selecting checkboxes in appropriate column. “**DO NOT SELECT FROM WORK GROUP AT ALL**”.

<b>Notifications</b>					
Who should receive each notification type?					
Notification Type	Contract Managers		Stakeholders		External Contacts
	Contract	Work Group	Contract	Work Group	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget Exceeded	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Percentage Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date - Advance Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
End Date - Advance Notices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
End Date Passed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Renewal Date - Advance Notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renewal Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Date Passed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notification types include:

- **Start Date-Advance Notice** - Sends an advance notice to alert users of an upcoming contract start date, based on the schedule set in the Advance Notice Settings section of this page.
- **Start Date Passed** – Sent when the contract start date occurs
- **End Date – Advance Notices**-Sends an advance notice to alert users of an upcoming contract end date, based on the schedule set in the Advance Notice Settings.
- **End Date Passed** – Sent when the contract end date occurs

- **Renewal Date** – Advance Notices-Sends an advance notice to alert users of an upcoming contract renewal date, based on the schedule set in the Advance Notice Settings.
- **Renewal Date Passed** – Sent when a contract renewal date occurs.

4. Configure **Advance Notice Settings** for contract start, end and renewal dates.

**Start Date** - In the Advance Notice#1 (in Days) column, enter the number of days prior to the contract start date that a reminder is sent to users selected on the Start Date – Advance Notice notification.

**End Date** - Enter the number of days prior to the contract end date that reminders are sent to users selected on the End Date -Advance Notices notification. You can enable up to three advance notifications by entering a number in the Advance Notice#1, #2, and #3 columns.

For example, if you have selected Contract Managers to receive End Date -Advance Notices in step 3, and enter 30, 15, and 1 in the End Date field here, the system will send advance notifications to contract managers 30 days prior to the end date, 15 days prior to the end date, and 1 day prior to the end date.

**Renewal Date** - Enter the number of days prior to the contract renewal date that reminders are sent to users selected on the Renewal Date - Advance Notices notification. You can enable up to three advance notifications by entering a number in the Advance Notice #1, #2, and #3 columns.

Advance Notice Settings				
Leave a field blank to turn off that advance notice.				
Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)	
Start Date	<input type="text"/>			
End Date	<input type="text" value="30"/>	<input type="text" value="15"/>	<input type="text" value="1"/>	
Renewal Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	

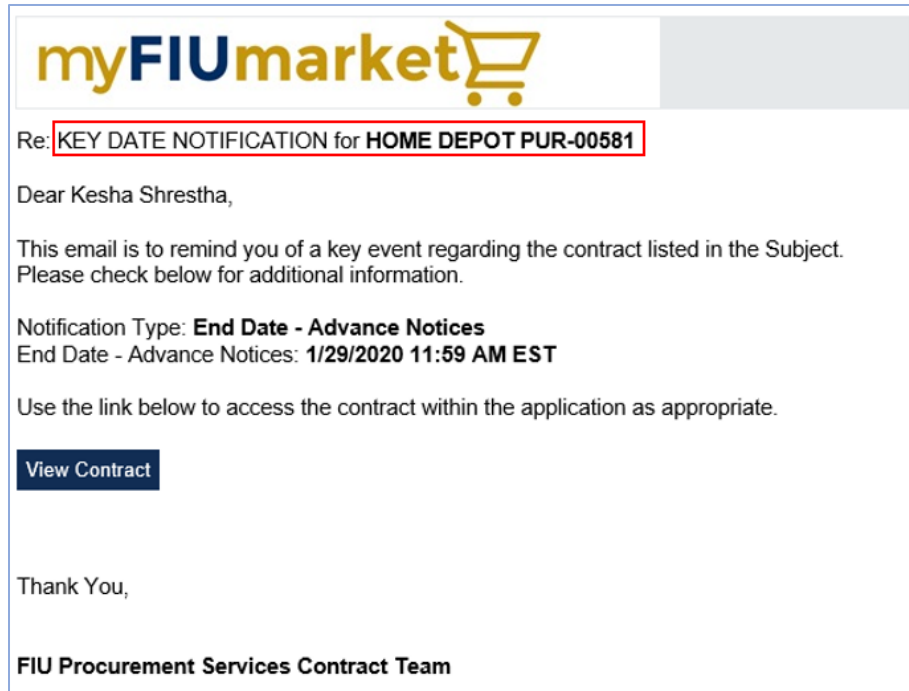
[Save Changes](#)

5. For Sourcing contracts: Under **Sourcing Event Advance Notice**, enter the number of days prior to the contract end date that the sourcing event advance notification is sent to sourcing event managers. This is a system notification that notifies sourcing event managers that a contract created from a sourcing event is up for renewal or about to expire and provides an option to re-create the sourcing event by copying the original sourcing event to a new sourcing event.

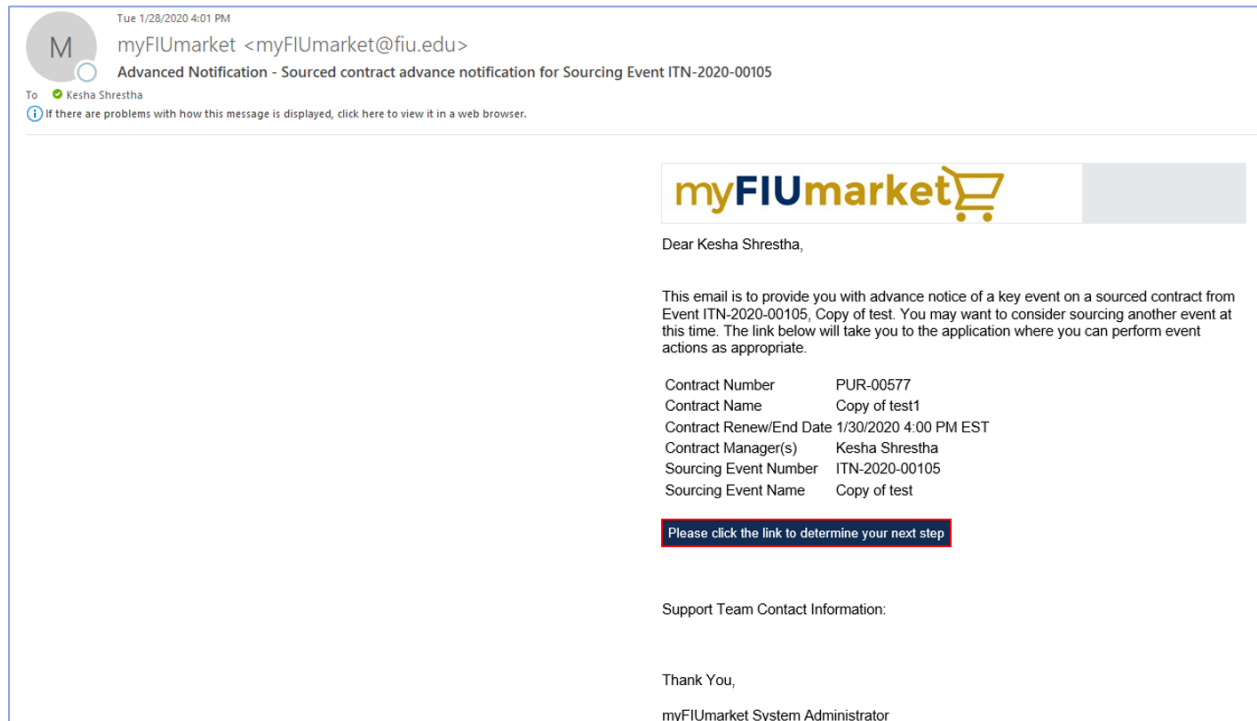
Advance Notice Settings				
Leave a field blank to turn off that advance notice.				
Advance Notice For...	Advance Notice #1 (in Days)	Advance Notice #2 (in Days)	Advance Notice #3 (in Days)	
Start Date	<input type="text"/>			
End Date	30 <input type="text"/>	15 <input type="text"/>	1 <input type="text"/>	
Renewal Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Sourcing Event Advance Notice				
Provide the Event Owner Advance Notice for the Contract End Date (in Days)		60 <input type="text"/>		
Spend Tier Notification Settings				
Send Spend Tier Notification For		<input type="checkbox"/> PR spend <input type="checkbox"/> PO spend <input type="checkbox"/> Invoice spend		
				<b>Save Changes</b>

6. Click **Save Changes**.

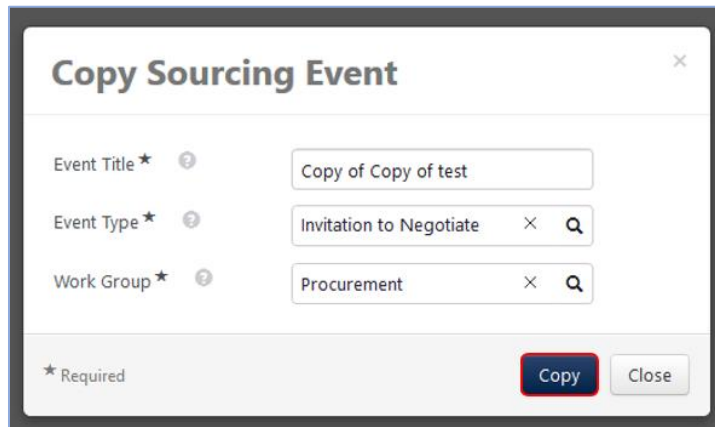
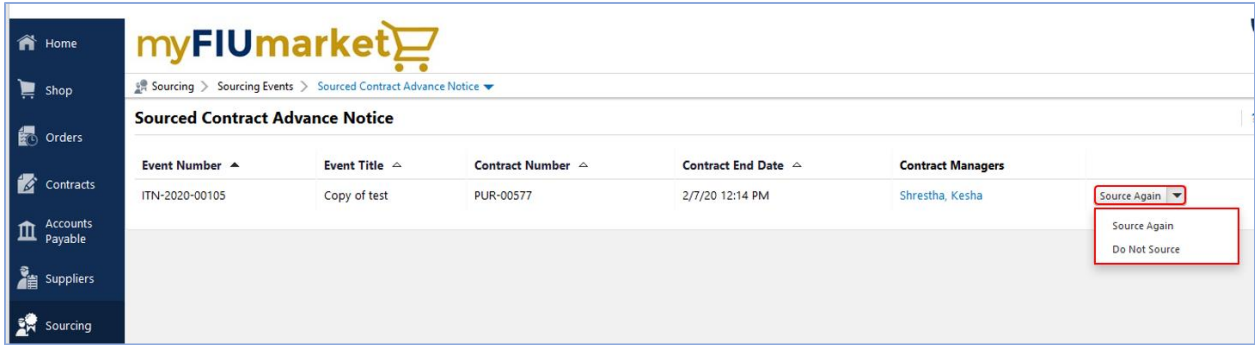
7. Here's the sample of email notification that is received by contract managers, stakeholders and external contacts based on the choices made.



8. For **Sourcing Contracts**: The sourcing event manager will receive an email notification prior to end of contract based on the saved advance notice days.



The sourcing event managers have the option to re-create the sourcing event by copying the original sourcing event to a new sourcing event or do not source at all.



A new sourcing event is created based on previous sourcing event.

