

ACCESS SOFTWARE RATE CONTRACT TRAINING



AGENDA

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1.	Rate contract Excel sheet
2.	Creating Vendor Master – OEM & Supplier
3.	Creating Rate Contract
4.	Upload RC
5.	View RC Items
6.	Creating RC Indent



RATE CONTRACT EXCEL SHEET

The RC Upload Format will be in RC upload page as shown below

<u>RC Upload Format</u>

SINo	catalogNo	itemDesc	unit/packSize	HSN_CODE	unitRate	discount	taxes
1	Cat2000	ARGON GAS GRADE I HIGH PURITY 99.9999% - INOX AIR PRODUCTS PVT LTD - Cubic Meter	Cubic Meter	28042100	950.25	0	0
2	Cat20001	ARGON +HYDROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (95%+5%) - INOX AIR PRODUCTS PVT LTD - Cub	Cubic Meter	28042990	1560.00	0	0
3	Cat20002	ARGON +HYDROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (90%+10%) - INOX AIR PRODUCTS PVT LTD - Cu	Cubic Meter	28042990	1560.25	0	0
4	Cat200403	ARGON +NITROGEN MIXTURE GAS GRADE I HIGH PURITY 99.999% (90%+10%) - INOX AIR PRODUCTS PVT LTD - Cu	Cubic Meter	28042990	1320.75	0	0



RATE CONTRACT EXCEL SHEET (CONT.,)

- Step 1: Concatenate catalogue number with pack size and paste the same as values in catalogNo column. Formula used for concatenating is shown below
- Step 2: Concatenate with values of cat number, pack size with item description. Paste the same as values in **itemDesc column**. Formula used for concatenating is shown below

E	3 9-				TESTING-HQ-DA	NTA - Excel		₽ Search								
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1	SINO	catalogN	0		itemDesc		un	it/packSize	HSN	CODE	unitRate	discount	taxes			
2	1	Cat 001	AR	GON GAS GRADE I HIGH	PURITY 99.999%	- INOX AIR PRO	DUCTS Cubic N	feter	1	28042100	950.00	0	0	=concaten	ate(82," -	",D2," - ",C2)
3	2	Cat 002	AR	GON +HYDROGEN MIXT	URE GAS GRADE I	HIGH PURITY 99.9	99% (9 Cubic N	feter		28042990	1560.00	0	0			
4	3	Cat 003	AR	SON +HYDROGEN MIXT	URE GAS GRADE I	HIGH PURITY 99.9	99% (9 Cubic N	feter		28042990	1560.00	0	0			
5	4	Cat 004	AR	GON +NITROGEN MIXT	JRE GAS GRADE I	HIGH PURITY 99.99	99% (9 Cubic N	feter		28042990	1320.00	0	0			
6	5	Cat 005	AR	SON +NITROGEN MIXTU	IRE GAS GRADE I H	IIGH PURITY 99.99	9% (95 Cubic N	teter		28042990	1320.00	0	0			



RATE CONTRACT EXCEL SHEET (CONT.,)

 Copy the Concatenated value and paste using paste special option -> Values

6	9-0			ESTING-HQ-DATA - Erro			P Search	
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2	1 Cat 001	ARGON		Owner	and the second	ic Meter	28042100	950
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5	4 Cat 004	ARGON	C formate	Otemate	ic Meter	28042990	1320	
6	5 Cat 005	ARGON	Comments	O Valuer an	f number formati	ic Meter	28042990	1320
7	6 Cat 005	HYDRO	Ovalidation	C All marries	a conditional formation	ic Meter	28041000	1650
0	7 Cat 007	NITROS	C. Hernerald	C. La line des		ic Meter	28043000	\$40
9	8 Cat 008	ZEROA	peration			ic Meter	28042990	990
10	9 Cat 009	NITROL	(1) Ngne	OBottok		k Meter	28112930	1857
11	10 Cat 010	OXYGE	O Age	() Djvide		ic Meter	28044010	1725
12	11 Cat 011	OXYGE	O Proton			ic Meter	28044010	770
13	12 Cat 012	SYNTH	Skip blanks	Transpose		ic Meter	28043000	2905
14	13 Cat 013	NITRIC				ic Meter	28046900	110953
15	14 Cat 014	CARBO	Paste Link	OE	Cancel		28112940	13185
16	15 Cat 015	CHLORIN	E GAS GRADET HIGH P	URIT STORE TITELLS	KOJ - INUX AIKKO		28011000	738
17	16 Cat 016	SULPHUR	DI-OXIDE GAS GRAD	ET HIGH PURITY 99.9%	'8'TYPE(1.5 KG) KG		28046900	11098
18	17 Cat 017	METHANI	GAS GRADE I HIGH F	URITY 99.5% BTYPE(1	S KG] - INOX /KG		27112100	1723
19	18 Cat 018	ETHYLENE	GAS GRADE I HIGH P	URITY 99.95% 'O'TYPE(IS KG) - INOX /KG	5	27111400	6864
20	19 Cat 019	SUI PHUR	HEXA FLUCRIDE GAS	GRADEL HIGH PURITY	99 95 TYPET KG		28139090	224/



RATE CONTRACT EXCEL SHEET (CONT.,)

Unit of measure is default and only number.

- Rate will be so many number(s) of the pack size. quantity punched in the indent is for that many numbers of the pack size and item description.
- Tax should be entered as percentage value (Eg. 0, 3, 5, 12, 18 & 28).
- Before uploading, please verify that there is no duplicate Catalogue Number as it will not upload and show error.



CREATING VENDOR MASTER – OEM & SUPPLIER

Go to ADD VENDOR Page

- Step 1: Search Vendor Name if it is not there, add the same
- Step 2: Vendor Name, Address, Country, GST No, PAN No, Phone No, Email id need to be entered and click save
- Repeat Step 2 for adding supplier detail also

ACCESS	EMPLOYEE	EMPLOYEE FAO PDA PME S		SDA	DA SO-PURCHASE SO-STORES SPO		SPO			GANAPATHY K.P.S STORES AND PURCHASE OFFICI CECRI		
Create PO							Datalla					
Print Purchase Order						vendor	Details					
Amend PO	Search Vendor I	Name	FERINA S		ALIGAI							
Order Cancellation												
General Conditions	Vendor Name *	ŧ	FERINA S	HOPPING M	Al Vend	dor Address *	17, SEKKALAI ROA	۱D,	Country *	(India	
Special Conditions							PERIYAR STATUE, KARAIKUDI - 6300	001				
Create Rate Contract	Vender CST NO				Pho	ne Number			Email Id	ſ		
Upload RC	Vendor 051 NO		33ATMPS	56342J1Z9			9443564411			l	ferinashopping@gmail.	
View RC Items	Pan Number		ATMPS63	342J	IBAN	N Number			Contact Person Name	(
Print Indent	Contact Person	Mobile			Banl	k Name			Bank Account Number	r (50530030891	
Upload Signed PO	Number									l	30330030031	
Add Vendor	Branch Name				IFSC	Code	IDIB000K594		Routing Number	ſ		
Add Category Level-3	Foreign Bank N	ame			Fore	ign Bank Address			SWIFT Code	ſ		
	-					-				l]	
								la				
	Beneficiary nan	ne			Bene	eficiary Address						

CREATING VENDOR MASTER – OEM & SUPPLIER (CONT.,)

 Already added vendor details will be shown below in the same page. So before adding a new vendor details check it and then add



Vendor Name	Vendor Address	Contact Number	Vendor GST
FERINA SHOPPING MALIGAI	17, SEKKALAI ROAD, PERIYAR STATUE, KARAIKUDI - 630001	9443564411	33ATMPS6342J1Z9
SANATHANA RETAILS LLP	BUILDING 2 (WH 2), PLOT NO. 12/P2 (IT SECTOR), HITECH, DEFENCE AND AEROSPACE PARK, DEVANAHALLI, BENGALURU - 562149	9962100026	29AARFN7490C1ZQ
Karunambigai Info System & Services	12, Madurai Road Madurai Mukku Sivagangai - 630561	9865152540	33AIPPN2826A1ZJ
INFRES METHODEX PRIVATE LIMITED	BLOCK NO. B-1 PLOT NO. D-7 MOHAN CO-OPERATIVE INDL. ESTATE, NEW DELHI - 110044	9818422002	07AABCI1964R1Z1
OM CORPORATIONS	OLD NO. 2, NEW NO. 20, F2-FIRST FLOOR, CITY LIMIT ROAD, SECRETARIAT COLONY, ADAMBAKKAM, CHENNAI - 600088	7338747244	33ACDPK0834H1Z1

 We can also edit the vendor details by simply searching the vendor name and update the information



CREATING RATE CONTRACT

 Then after adding the Supplier and OEM details go to Create Rate Contract Page and enter the details as shown below

ACCESS	EMPLOYEE	FAO	PDA	PME	SDA	SO-PURCHASE	SO-STORES	SPO		GANAPATHY K.P.S STORES AND PURCHASE OFFICE CECRI	ER,
Create PO											
Print Purchase Order						Create Ra	te Contract				
Amend PO				_							
Order Cancellation	From Date	ŧ		20	24-07-05		To Date *		2025-06-30		
General Conditions	Name of Ma	nufacturer	/ OEM	SU	CCESS TRAD	ERS	Name of Suppli	er	SUCCESS TRA	DERS	
Special Conditions	Address of I	Manufactur	er / OFM				Address of Supr	alier			
Create Rate Contract	Address of f	manaractar		NC) 27 B VOC R	OAD KARAIKUDI 63000	Address of Supp	Sher	NO 27 B VOC	ROAD KARAIKUDI 6300(
Upload RC	Email id of I	Manufactur	er / OEM *	suc	ccesssplygase	es1995@gmail.com	Email id of Supp	olier *	successsplyga	ses1995@gmail.com	
View RC Items	Mobile / Ph	one numbe	r Manufactur	er 934	45735928		Mobile / Phone	number Supplier	9345735928		
Print Indent											
Upload Signed PO	Vendor GST	Vendor GST *				D1ZP	Supplier GST *		33AEYPM3310	D1ZP	
Add Vendor	CSIR Tender reference number *			20	23_CSIR_154	713_1	Supplier Ref/Qu	atation No *	562661		
Add Category Level-3	CSIR Tender date *			20	23-05-19		Quotation date	*	2023-06-10		

Submit



UPLOAD RC

- After creating the RC move on to next step that is to Upload the RC
- Here fill the details as given below

ACCESS	EMPLOYEE	FAO	PDA	PME	SDA	SO-PURCHASE	SO-STORES	SPO		GANAPATHY K.P.S STORES AND PURCHASE OFFICER , CECRI
Create PO						Uploa	ad RC			
Print Purchase Order										
Amend PO										
Order Cancellation	VendorName		SUCCES:	S TRADERS						
General Conditions	From Date		03-07-20	124		To Date	ſ	30-06-2025		
Special Conditions			03-07-20	524			l	50-00-2025		
Create Rate Contract	Tender date		19-05-20	023		Bid number	[562661		
Upload RC	Name of Supp	lier	SUCCESS	S TRADERS		Select Budge	et Head:	CHEMICALS/COMSUN	MABLES/OTHER F	
View RC Items	6.1									
Print Indent	Select Level-2		CHEMIC	ALS		Upload Exce		Choose File No file Jpload only excel files	e chosen	
Upload Signed PO										
Add Vendor						Sub	mit			
Add Category Level-3										

- Here select the vendor name so that data from DB will be fetched and it will be shown as a frozen field
- Select the Budget head, Level 2 and after that upload the Excel files which we created
- Before uploading, please verify that there is no duplicate Catalogue Number as it will not upload and show error.



VIEW RC ITEMS

After uploading the RC we can check the same in View RC items page

ACCESS	EMPLOYEE FAO	PDA	PME	SDA	SO-PURCHASE	SO-STORES	SPO			GANAPATHY K.P.S STORES AND PURCHASE OFFICER , CECRI
Create PO					View R	C Items				
Print Purchase Order										
Amend PO										
Order Cancellation	Budget Code:	Select		Sub	Budget Head:	Select		Search RC OEM Vendor:	Se	lect
General Conditions						(
Special Conditions	Search Based On Cataloo	a (
Create Rate Contract	No Or Item Description:									
Upload RC										
View BC Items										

 By searching the Budget code, Sub Budget head and OEM Vendor name we can search the items which was uploaded already



CREATING RC INDENT

- Before creating a RC Indent, View RC items in the Employee role
- Indent type and Item type will be default as "RC" & "Consumables"

ACCESS	PLOYEE	FAO	PDA	PME	SDA	SO-PURCHASE	SO-STORES	SPO				GANAPATHY K.P.S STORES AND PURCHASE OFFICER , CECRI
Indent Other Than RC/AMC												
Indent for RC												
Indent for AMC		RA	TE CON	ITRACT								
Print Indent												
Certification Of IR		Indent Ty	pe		RC		Project	No:	STS 0016	Project Name:	STORES AND PURCHA	SE
Add Project Member		Item Type	2		Consult	ımable	Select E	udget Head:		Colort Cub Budget Heads		
Indent For Approval								-	CHEMICALS/COM30MABLES/011	Select Sub Budget Head.	CHEMICAES	
Indent Status		Vendor Se	earch		Succe	ss Traders	Select l	tem :	search item name (min 3 characte			
View RC Items		Add Iter	<u>m List</u>									
CONT. CI									- .			

- Select Project No, Budget head, Sub Budget head and search the vendor name from the drop down list
- Based on the vendor selected the RC item will be searched and will be fetched from Database



CREATING RC INDENT (CONT.,)

• Then in select item, search by entering the item name (min of 3 characters) and the

list of items will be shown as a pop up and select the items accordingly.

ACCESS	PLOYEE	FAO	PDA	PME :	SDA S	50-PURCHASE	SO-STORES	spo						GANAPATH STORES AN CECRI	Y K.P.S D PURCHASE OFFICER ,	
Indent Other Than RC/AMC																
Indent for RC																
Indent for AMC		RA	TE CON	NTRACT												
Print Indent																
Certification Of IR		Indent Typ	pe		RC	Project No: STS 001				Project Name: STORES AN				PURCHASE		
Add Project Member		Item Type			Consumable Select Budget Head:			ICIES	Colort Sub Budget H	and.						
Indent For Approval									CONTINGEN	NCIES	Select Sub Budget H	ead:	PROCOREMENT	F MADICINES F		
Indent Status		Vendor Se	arch		Apex lab	oratories private limit	ed Select Item	:	trip	•						
View RC Items		Add Iten	n List								,					
GRIN For Clearance		Cat No		Dotails Of the li	toms	Unit/Dack Size	Unit of Moore	ura Unit Pata	Quantity	Triple A Cal Pack siz	e- 15	ine.	Amount	Action		
GRIN Approval		Cat.ivo			terns				Quantity	Triple A Cal Forte Pa	ack size- 10			Action		
										Triple A Cal - D Tabl	ets 10'S Pack size- 10			Add		
										New Triple A Cal FD	Pack size- 15					

- The search can be made by either typing the CAT Number, Item Name, Description etc.,
- After selecting the items give the quantity and click add.
- Enter GEM Part id and Reason, Delivery location and Date and click submit



THANK YOU

