City and County of San Francisco — Office of Contract Administration

London N. Breed
Mayor

Alaric Degrafinried
Director and Purchaser

Purchasing

MEMORANDUM

DATE: April 1, 2019

TO: All Departments

FROM: Alaric Degrafinried, Purchaser and Director of the Office of Contract Administration

SUBJECT: Guidance on New CopySmart Agreements (OCA TC 96104)

The new CopySmart Agreements under OCA TC 96104 are effective as of April 1, 2019. To enter into new leases under the new CopySmart Agreements, Departments are instructed to follow the below guidance.

NEW LEASES:

Assessments from CopySmart suppliers:

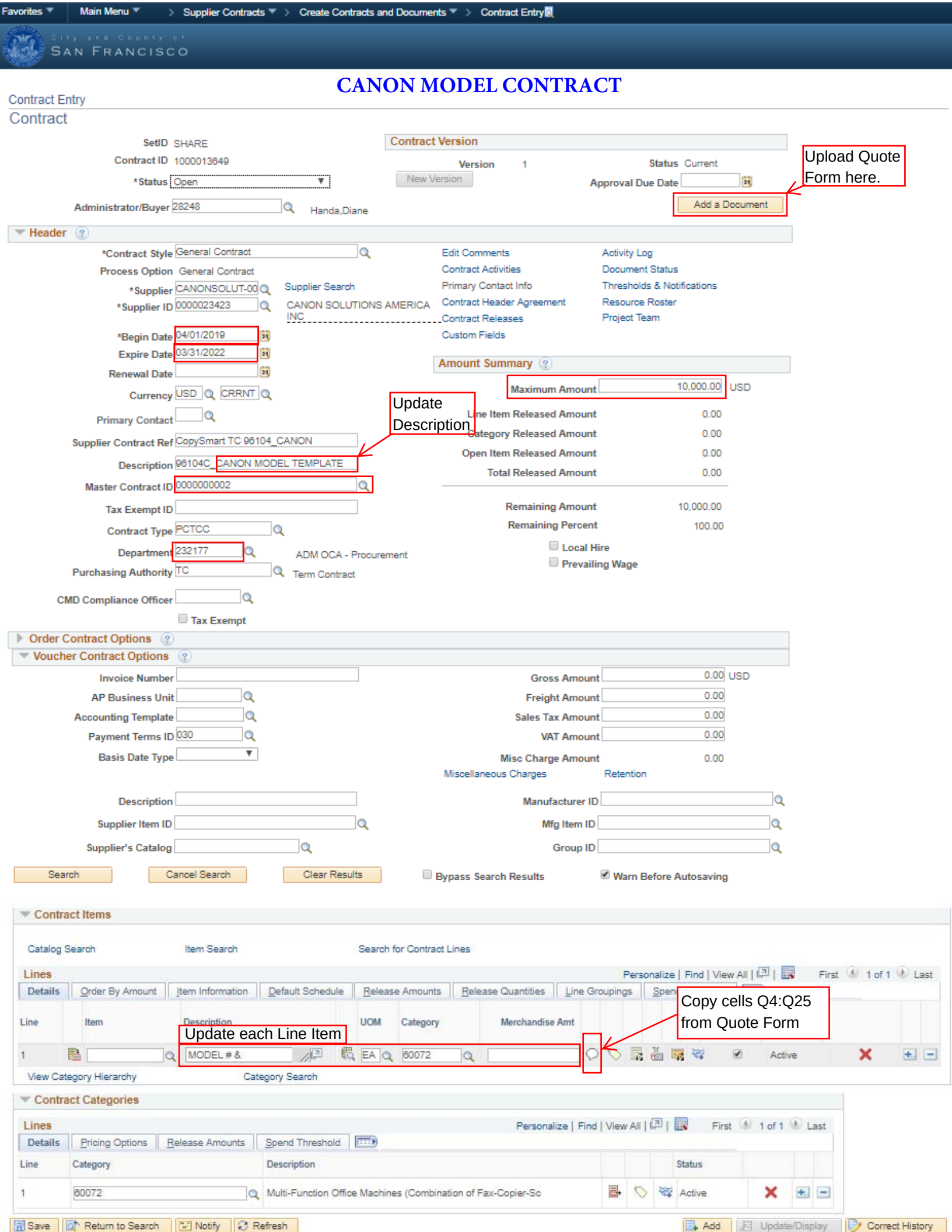
- Departments are strongly encouraged to solicit proposals/quotes from all three CopySmart suppliers (Canon Solutions America, Ricoh USA, Xerox Corporation). This will allow Departments to become familiar with the various offerings and choose the suite of MFD Equipment that best meets the needs for their entire fleet.

Setting up New Leases in PeopleSoft:

- Departments will continue to use Supplier Contracts in PeopleSoft for their CopySmart leases and release purchase orders off of them.
  1. **To set up a new contract, use the "Copy From Contract" function to pre-populate your contract using one of OCA's "model" CopySmart contracts (see attached)**:
     - Canon Solutions America: 1000013649
     - Ricoh USA: 1000013651
     - Xerox Corporation: 1000013650
  2. Update fields highlighted in red.
  3. Copy cells Q4:Q25 from the CopySmart Quote Form into the Line COMMENT.
  4. Once ready, contact Diane Handa (diane.handa@sfgov.org) for approval.
- A copy of the new CopySmart Quote Form accompanies this memo and can also be found on the OCA website at https://sfgov.org/oca/frequently-asked-questions-0.
  Use one CopySmart Quote Form per copier lease.

EXISTING LEASES:

- Currently active leases under one of the expired CopySmart Agreements will remain valid through the lease end date. No new leases or extensions of existing leases will be allowed under the expired CopySmart Agreements (OCA TC 96103) with Konica-Minolta, Ricoh USA, and Xerox Corporation.


Favorites
Main Menu
Supplier Contracts
Create Contracts and Documents
Contract Entry
City and County of SAN FRANCISCO
CANON MODEL CONTRACT
Contract Entry
Contract
SetID SHARE
Contract ID 1000013649
*Status Open
Administrator/Buyer 28248 Handa,Diane
Contract Version
Version 1
Status Current
New Version
Approval Due Date
Add a Document
Upload Quote Form here.
Header
*Contract Style General Contract
Process Option General Contract
*Supplier CANONSOLUT-00
Supplier Search
*Supplier ID 0000023423
CANON SOLUTIONS AMERICA INC
*Begin Date 04/01/2019
Expire Date 03/31/2022
Renewal Date
Currency USD CRRNT
Primary Contact
Supplier Contract Ref CopySmart TC 96104_CANON
Description 96104C_CANON MODEL TEMPLATE
Update Description
Master Contract ID 0000000002
Tax Exempt ID
Contract Type PCTCC
Department 232177 ADM OCA - Procurement
Purchasing Authority TC Term Contract
CMD Compliance Officer
Tax Exempt
Edit Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases
Custom Fields
Activity Log
Document Status
Thresholds & Notifications
Resource Roster
Project Team
Amount Summary
Maximum Amount 10,000.00 USD
Line Item Released Amount 0.00
Category Released Amount 0.00
Open Item Released Amount 0.00
Total Released Amount 0.00
Remaining Amount 10,000.00
Remaining Percent 100.00
Local Hire
Prevailing Wage
Order Contract Options
Voucher Contract Options
Invoice Number
AP Business Unit
Accounting Template
Payment Terms ID 030
Basis Date Type
Gross Amount 0.00 USD
Freight Amount 0.00
Sales Tax Amount 0.00
VAT Amount 0.00
Misc Charge Amount 0.00
Miscellaneous Charges
Retention
Description
Supplier Item ID
Supplier's Catalog
Manufacturer ID
Mfg Item ID
Group ID
Search
Cancel Search
Clear Results
Bypass Search Results
Warn Before Autosaving
Contract Items
Catalog Search
Item Search
Search for Contract Lines
Lines
Personalize | Find | View All | First 1 of 1 Last
Details
Order By Amount
Item Information
Default Schedule
Release Amounts
Release Quantities
Line Groupings
Line
Item
Description
UOM
Category
Merchandise Amt
Update each Line Item
1
MODEL # &
EA
60072
Active
Copy cells Q4:Q25 from Quote Form
View Category Hierarchy
Category Search
Contract Categories
Lines
Personalize | Find | View All | First 1 of 1 Last
Details
Pricing Options
Release Amounts
Spend Threshold
Line
Category
Description
Status
1
60072
Multi-Function Office Machines (Combination of Fax-Copier-Sc
Active
Save
Return to Search
Notify
Refresh
Add
Update/Display
Correct History

City and County of SAN FRANCISCO

RICOH MODEL CONTRACT

Contract Entry

Contract

SetID SHARE
Contract ID 1000013651
*Status Open
Administrator/Buyer 28248 Handa,Diane

Contract Version
Version 1 Status Current
New Version
Approval Due Date
Add a Document

Header

*Contract Style General Contract
Process Option General Contract
*Supplier RICOHUSAIN-001 Supplier Search
*Supplier ID 0000012182 RICOH USA INC
*Begin Date 03/28/2019
Expire Date 03/31/2022
Renewal Date
Currency USD CRRNT
Primary Contact
Supplier Contract Ref CopySmart TC 96104_RICOH
Description 96104R_RICOH MODEL TEMPLATE
Master Contract ID 0000000003
Tax Exempt ID
Contract Type PCTCC
Department 232177 ADM OCA - Procurement
Purchasing Authority TC Term Contract
CMD Compliance Officer
Tax Exempt

Edit Comments | Activity Log
Contract Activities | Document Status
Primary Contact Info | Thresholds & Notifications
Contract Header Agreement | Resource Roster
Contract Releases | Project Team
Custom Fields

Amount Summary

Maximum Amount	10,000.00 USD
Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	0.00
Total Released Amount	0.00

Local Hire
Prevailing Wage

Order Contract Options

Voucher Contract Options

Invoice Number
AP Business Unit
Accounting Template
Payment Terms ID 030
Basis Date Type

Gross Amount 0.00 USD
Freight Amount 0.00
Sales Tax Amount 0.00
VAT Amount 0.00
Misc Charge Amount 0.00
Miscellaneous Charges | Retention

Description
Supplier Item ID
Supplier's Catalog

Manufacturer ID
Mfg Item ID
Group ID

Search | Cancel Search | Clear Results | Bypass Search Results | Warn Before Autosaving

Contract Items

Catalog Search | Item Search | Search for Contract Lines

Lines — Personalize | Find | View All | First 1 of 1 Last

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold

Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
1		MODEL # &	EA	60072		☑	Active

View Category Hierarchy | Category Search

Contract Categories

Lines — Personalize | Find | View All | First 1 of 1 Last

Details | Pricing Options | Release Amounts | Spend Threshold

Line	Category	Description	Status
1	60072	Multi-Function Office Machines (Combination of Fax-Copier-Sc	Active

Save | Return to Search | Notify | Refresh | Add | Update/Display | Correct History

City and County of SAN FRANCISCO

XEROX MODEL CONTRACT

Contract Entry

Contract

SetID SHARE
Contract ID 1000013650
*Status Open
Administrator/Buyer 28248 Handa,Diane

Contract Version
Version 1 Status Current
New Version Approval Due Date
Add a Document

Header

*Contract Style General Contract
Process Option General Contract
*Supplier XEROXCORPO-0 Supplier Search
*Supplier ID 0000008015 XEROX CORPORATION
*Begin Date 03/28/2019
Expire Date 03/31/2022
Renewal Date
Currency USD CRRNT
Primary Contact
Supplier Contract Ref CopySmart TC 96104_XEROX
Description 96104X_XEROX MODEL TEMPLATE
Master Contract ID 0000000004
Tax Exempt ID
Contract Type PCTCC
Department 232177 ADM OCA - Procurement
Purchasing Authority TC Term Contract
CMD Compliance Officer
Tax Exempt

Edit Comments | Activity Log
Contract Activities | Document Status
Primary Contact Info | Thresholds & Notifications
Contract Header Agreement | Resource Roster
Contract Releases | Project Team
Custom Fields

Amount Summary

Maximum Amount	10,000.00	USD
Line Item Released Amount	0.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	0.00	
Remaining Amount	10,000.00	
Remaining Percent	100.00	

Local Hire
Prevailing Wage

Order Contract Options

Voucher Contract Options

Invoice Number
AP Business Unit
Accounting Template
Payment Terms ID 030
Basis Date Type

Gross Amount 0.00 USD
Freight Amount 0.00
Sales Tax Amount 0.00
VAT Amount 0.00
Misc Charge Amount 0.00
Miscellaneous Charges | Retention

Description
Supplier Item ID
Supplier's Catalog

Manufacturer ID
Mfg Item ID
Group ID

Search | Cancel Search | Clear Results | Bypass Search Results | Warn Before Autosaving

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Line	Item	Description	UOM	Category	Merchandise Amt	Include for Release	Status
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Line	Category	Description	Status
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Save | Return to Search | Notify | Refresh | Add | Update/Display | Correct History

Supplier and Department CopySmart Order Form (OCA TC 96104)

DEPARTMENT USE				SUPPLIER USE	
Department Name:				Quote Date:	
Ordered By:				Quote #:	
Dept. Contact:		Ph #:		Quote By:	
Department Approver:				Supplier Contract #:	
				Supplier Telephone Number:	

DELIVERY/BILLING INFORMATION

SUPPLIER INFORMATION:	DELIVER TO:	BILL TO ADDRESS:

SUPPLIER REMITTANCE ADDRESS:	SPECIAL INSTRUCTIONS / REQUIREMENTS (If necessary):
EST. LEASE START DATE:	
EST. LEASE END DATE:	

One MFD + Options per form.

Model #	Monthly Lease Amount	Term	Model Description
	$ -		

Option Part #	Option Amount	Option Description
1	$ -	
2	$ -	
3	$ -	
4	$ -	
5	$ -	
6	$ -	
7	$ -	
8	$ -	
Total Monthly Lease plus Options	**$ -**	

If needed, use an additional copy of this order form to list additional options.*

Cost per Copy Estimates		CPC Charge		Per Month Totals		
Black / White Estimated Monthly Volume	0	$ -		$ -		
Color Estimated Monthly Volume	0	$ -		$ -	**Total Monthly B/W & Color CPC**	**$ -**

Monthly Total	Sales Tax (8.5%)	Subtotal	Est. TOTAL Lease = (Monthly Subtotal x Lease Term)	
$ -	$ -	**$ -**		**$0.00**

TRANSFERRING LEASE INFO INTO PEOPLESOFT

1. **Cells Q4:Q25 in the Quote Form will auto-populate with Lease info.**
2. **Copy cells Q4:Q25 into Line COMMENTS.**

LEASE INFO
Copy the Below Table into the LINE Comment
Model #: 12345
Monthly Lease Amount 150
Model #: 12345
Monthly Lease Amount: $150.00
Option: Stapler
Option: 3-hole punch
Option:
Option:
Option:
Option:
Option:
Option:
Lease Term: 36 months
Lease Start Date: 04/01/2019
Lease End Date: 03/31/2022
B/W CPC: 10000 pages @ $0.001
COLOR CPC: 10000 pages @ $0.010
Total Est Annual Lease: $10487.61
DELIVER TO: City Hall, Room 430 1 Carlton B Goodlett Pl
BILL TO ADDRESS: City Hall, Room 430 1 Carlton B Goodlett Pl SF, CA 94102

CopySmart Supplier Contact Info:
CANON SOLUTIONS AMERICA: Jeffrey Carvalho - Work: 415.743.7324 - Cell: 415.999.1389 - Email: jcarvalho@csa.canon.com
RICOH USA: Kelita Lee - Cell: 510-909-1622 - Email: Kelita.Lee@ricoh-usa.com
XEROX CORPORATION: Scott Reiber - Work: 925.701.1657 - Cell: 505.264.7071 - Email: scott.reiber@xerox.com