

Amending Non-Federal Customer Contracts Overview

Once a Contract is set to Active, most changes have to be made using amendments. The amendment process is required to update fields on the contract header, add additional contract lines, adjust contract amounts, update prepaid balance, etc.

This job aid provides basic steps for processing the following amendments:

- Contract Header
- Contract Terms
- Increase/Decrease Prepaid Amount
- Increase/Decrease Amount Based Contract

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Amend Contract Header

1. Navigate to the **General Information** page using the following path:

Main Menu > Customer Contracts > Create and Amend > General Information

The General Information search page displays.

Favorites Main Menu Customer Contracts General Information
General Information
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value Add a New Value
Search Criteria
Business Unit = 🗸 50100 🔍
Contract begins with V 0000001992
Description begins with 🗸
Sold To Customer begins with 🗸
Customer Name begins with 🗸
Contract Status begins with V
Processing Status = V
Contract Type begins with V
Contract Classification = V
Region Code begins with 🗸
Contract Administrator begins with V
Master Contract # begins with V
Limit the number of results to (up to 300): 300
Search Clear Basic Search 🖾 Save Search Criteria
Find an Existing Value Add a New Value

- 2. The **Business Unit** defaults for your agency. Do not change it.
- 3. Enter the Contract number that needs to be amended in the **Contract** field.
- 4. Click the **Search** button.



The **General** tab displays.

Favorites	Customer Contracts \checkmark \rightarrow	Create and Amend	General Information	
				Related Content 🔻 New Window Help Personalize
General Lines Amendments				
Contract Number	0000001992		Sold To Customer PIEDMONT CONCRETE CONT	FRACTORS INC.
Amendment Number	000000000		*Contract Status ACTIVE	×Q
Am	end Contract		Add to My Contracts	
Description	Local - Non Federal		Processing Status Active	
Contract Admin		Q	Amendment Status Complete	
Region Code			Business Unit VA Dept of Transportation	
Contract Type	L		Contract Classification Standard	
Currency Code	USD		Start Date 08/15/2019	
Exchange Rate Type	CRRNT		End Date	
Contract Signed	08/15/2019		Last Update Date/Time 08/15/2019 11:32:53AM	
Contract Role			Last Update User ID SHELLY.PRYOR	
Revenue Profile		Se	separate Fixed Billing and Revenue:	
Use Project ChartFields:	\checkmark			
Other Information				
Summary of Amounts (?)				
Billing Plans Revenue Plans	Milestones	Renewals	Supplemental Data Go To	ore V
Return to Search	Notify			🛃 Add 🖉 Update/Display
General Lines Amendments				

5. Click the **Amend Contract** button.



The Amendments page displays.

Favorites -	Main	Menu - > Customer Co	ntracts 🔻 > Create and Amend	l →	General Informat	ion			
Ge <u>n</u> eral	Lines	Amendments							Related Content - New Window Help Persona
Per	Contract	Number 0000001992 endment 0000000001	E Sold Co	To Cu ntract	stomer PIEDMON	CONCRETE C	ONTRACTOR	IS INC.	
	View Curre	ent					1		
General	Statistics	Billing Amended Amounts	Revenue Amended Amounts	Pe	rsonalize Find V	iew Ali 🗠 🗄	S First V	9 1-2 of 2 🧐 Last	
Amendment	Am	endment Type	Reason		Process Date	Amendment Status	Detail	Notes	
0000000000					08/15/2019	Complete	Detail	Notes	
000000001	Co	ontract Header 🗸 🗸	Amend Header Info	~	08/20/2019	Pending	Detail	Notes	
Billing Plans		Revenue Plans N	lilestones Renewals		Amount Allocation	Supp	elemental Data	Go To	lore V
General Line	Return es Amend	n to Search 🔛 Notify							Add Update/Display

Note: Use this page to enter initial details when you first begin an amendment. You can also view a list of all amendments made to a contract and navigate to the details of those amendments.

- 6. Click the **Amendment Type** drop-down.
- 7. Select **Contract Header**.
- 8. Click the **Reason** drop-down menu.
- 9. Select Amend Header Info option.
- 10. Click the Save button.
- 11. Click the General tab.



Favorites Main Menu Customer Contracts Create and Amend	d → General Information	
General Lines Amendments	Related Conte	nt 🕶 New Window Help Personalize Page 📰
Contract Number 0000001992 Pending Amendment 0000000001 View Current	Sold To Customer <u>PIEDMONT CONCRETE CONTRACTORS INC</u> *Contract Status ACTIVE Q Add to My Contracts	
Description Local - Non Federal Contract Admin Region Code Contract Type L Currency Code USD Exchange Rate Type CRRNT Contract Signed 08/15/2019 Contract Role Revenue Profile Use Project ChartFields: ● Other Information ● Summary of Amounts Billing Plans Revenue Plans Milestones Renewals Exchange Return to Search Exchange Notify General Lines Amendments	Look Up Contract Type SetID 50100 Contract Type begins with √ Look Up Clear Cancel Basic Lookup Search Results View 100 First 1-7 of 7 Last Contract Type A F G J L O R	Help

- 12. For the scenario, we will change the **Contract Type**.
- 13. Click the **Contract Type** lookup button.
- 14. Select the desired option. In this scenario, select **O**.



Favorites Main Menu Cust	omer Contracts 🗸 > C	reate and Amend $ extsf{-}$ >	General Information		
					Related Content 🗸 New Window Help Persona
General Lines Amendments					
Contract Number 0000	001992		Sold To Custome	PIEDMONT CONCRETE CON	TRACTORS INC.
Pending Amendment 0000	000001		*Contract Statu	s ACTIVE	×Q
View Ci	urrent		Add to My Cont	racts	
Description Local	- Non Federal		Processing Statu	s Active	
Contract Admin		Q	Amendment Statu	s Pending	
Region Code		Q	Business Un	it VA Dept of Transportation	
Contract Type O		Q	Contract Classificatio	n Standard	
Currency Code USD			Start Dat	e 08/15/2019	
Exchange Rate Type CRR	NT		End Dat	e	
Contract Signed 08/15	/2019	81	Last Update Date/Tim	e 08/20/2019 2:38:47PM	
Contract Role		Q	Last Update User I	D SHELLY.PRYOR	
Revenue Profile		S	Separate Fixed Billing and Revenu	ie:	
Use Project ChartFields:		 Separat 	te As Incurred Billing and Revenu	e: 📖	
• Other Information					
▶ Other Information					
Summary of Amounts (?)					
Billing Plans Revenue Plans	Milestones	Renewals	Amount Allocation Suppl	emental Data Go To	Aore 🗸
Return to Search	ý				🛃 Add 🖉 Update/Display
General Lines Amendments					

- 15. Click the **Save** button.
- 16. Click the Amendments tab.

Favorites 🗸 🛛 🕅	Main Menu 🗸 🔹 👌 Customer Co	ntracts \checkmark > Create and Amend \checkmark	> General Informat	ion					
							Related Content -	New Window Help	Persona
Ge <u>n</u> eral <u>L</u> ines	Amendments								
Contr	ract Number 0000001992	Sold To C	ustomer PIEDMON	CONCRETE C	ONTRACTORS	INC.			
Pending	Amendment 0000000001	Contrac	t Status ACTIVE						
View C	Current								
Amendments		F	ersonalize Find V	iew All 🖾 📗	First 🕚	1-2 of 2 🕑 Last			
General <u>S</u> tatis	stics Billing Amended Amounts	Revenue Amended Amounts Mis	c. 💷						
Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes			
000000000			08/15/2019	Complete	Detail	Notes			
000000001	Contract Header 🗸	Amend Header Info	08/20/2019	Pending	Detail	Notes			
Billing Plans	Revenue Plans M	ilestones Renewals	Amount Allocation	Supp	lemental Data	Go To 🛛	lore 🗸		
Save 💽 Re	eturn to Search 🖹 Notify							Add 🖉 Update/Dis	play
General Lines Am	endments								

17. Click the **Detail** link next to the **Pending** amendment.



Favorites - Main Menu -	> Customer Contracts	 Create and Amer 	nd 🕶 > General In	formation	
Amendment Details					Ν
Contract (000001992		Amendment Numbe	r 000000001	
Sold To Customer 0	00000001				
Amendment Type	Contract Header 🗸 🗸		*Process Da	te 08/20/2019	
Amendment Reason A	Amend Header Info 🗸 🗸		*Amendment Statu	IS Pending Ready	
Total Billing Adjustment	.00	Tota	I Revenue Adjustme	nt 0.00	
Fixed Billing Adjustment 0	.00	Fixed	I Revenue Adjustme	nt 0.00	
Fixed Billing Allocation	ncomplete	Fixe	d Revenue Allocatio	n Incomplete	
Additional Amendment D	etails				
Reference ID			User Ref User Ref	#1	
Amendment Components				Personalize Find View A	All 💷 🔣 First 🕚 1 of 1 🕑 Last
General Statistics					
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contract Header		Туре	Update	L	0
Amendment Amount Allocation Return to General Information		Internal Notes			
Save Return to Search	Notify				

- 18. Confirm the Amendment Components.
- 19. Click the Amend Status drop-down menu.
- 20. Select the **Ready** option.

Favorites 🗸 Main Menu 🗸	> Customer Contracts ·	 Create and Amer 	nd 🕶 > General Info	ormation	
Amendment Details					
Contract	000001992		Amendment Number	000000001	
Sold To Customer	0000000001				
Amendment Type	Contract Header		Process Date	08/20/2019	
Amendment Reason	Amend Header Info		*Amendment Status	Ready V	Process Amendment
Total Billing Adjustment	0.00	Tota	Revenue Adjustment	t 0.00	
Fixed Billing Adjustment	0.00	Fixed	Revenue Adjustment	t 0.00	
Fixed Billing Allocation	Incomplete	Fixe	d Revenue Allocation	Incomplete	
Additional Amendment	Details				
Reference ID)		User Ref #1	1	
			User Ref #2	2	
Amendment Components				Personalize Find View A	All 🔁 🔣 🛛 First 🕙 1 of 1 🕑 Last
General Statistics					
Component	Amend Ref #1	Label Fieldname	Edit Type O	0ld Value	New Value
1 Contract Header		Туре	Update L		0
		Internal Notes			
Return to General Information					
Save 🔯 Return to Search	Notify				

21. The **Process Amendment** button displays.



22. Click the Process Amendment button.

Favorites 🗸 Main Menu 🗸	> Customer Contracts	 Create and Ame 	nd 👻 > General Inf	ormation			
							Nev
Amendment Details							
Contract	0000001992		Amendment Number	000000001			
Sold To Customer	000000001	Ameno	iment Completed On	08/20/2019 2:47PM			
Amendment Type	Contract Header		Process Dat	e 08/20/2019			
Amendment Reason	Amend Header Info		Amendment Statu	s Complete			
Total Billing Adjustment	0.00	Tota	I Revenue Adjustmen	t 0.00			
Fixed Billing Adjustment	0.00	Fixed	d Revenue Adjustmen	t 0.00			
Fixed Billing Allocation	Incomplete	Fix	ed Revenue Allocatio	n Incomplete			
Additional Amendment	Details						
Reference IL)		User Ret #	1			
			User Ref #	2			
Amendment Components				Personalize Find View	/ All 🖓 🔣	First 🕙 1 of 1 🕑 Last	
General Statistics							
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value		
1 Contract Header		Туре	Update	-	0		
		Internal Notes					
Return to General Information							
Return to Search	Notify						
(<u> </u>							

23. The Amend Status updates to Complete. The contract header has been successfully updated.



Amend Contract Terms

1. Navigate to the **General Information** page using the following path:

Main Menu > Customer Contracts > Create and Amend > General Information

Favorites 🗸	Main Menu 🗸	> Customer Contracts -	Create and Amend ->	General Information
General Info	rmation			
Enter any inform	ation you have and clic	k Search. Leave fields blank fo	or a list of all values.	
Find an Exist	ing Value Add a No	ew Value		
Search Cr	iteria			
Busine	ss Unit = 🗸	50100		
C	ontract begins with 🗸	0000001998	-	
Desc	cription begins with 🗸			
Sold To Cu	stomer begins with 🗸	Q		
Customer	Name begins with 🗸			
Contract	Status begins with 🗸	Q		
Processing	Status = 🗸		\checkmark	
Contrac	t Type begins with 🗸	Q	·	
Contract Classif	fication = 🗸		\sim	
Regior	n Code begins with 🗸	Q		
Contract Admin	istrator begins with V	Q		
Master Cor	ntract # begins with 🗸	Q	•	
Case Sensit	tive of regults to (up to 200	200		
Linit the number	i or results to (up to 30t	<i>IJ.</i> 300		
Search	Clear Basic Searc	:h 📴 Save Search Criteria		

- 2. Enter the Contract number in the **Contract** field that needs to be amended.
- 3. Click the **Search** button.



Favorites Main Menu Customer Contracts	Create and Amend -> General Information	
		Related Content 🔻 New Window Help
General Lines Amendments		
Contract Number 0000001998	Sold To Customer PIEDMONT CONCRETE CONTRACTORS	INC.
Amendment Number 000000000	*Contract Status ACTIVE × Q	
Amend Contract	Add to My Contracts	
Description Concrete for 121	Processing Status Active	
Contract Admin	Amendment Status Complete	
Region Code	Business Unit VA Dept of Transportation	
Contract Type L	Contract Classification Standard	
Currency Code USD	Last Update Date/Time 09/04/2019 12:19:38PM	
Exchange Rate Type CRRNT	Last Update User ID SHELLY.PRYOR	
Contract Signed 09/02/2019	Separate Fixed Billing and Revenue:	
Contract Role		
Revenue Profile		
Use Project ChartFields: 🗹		
Other Information		
Summary of Amounts (?)		
Billing Plans Revenue Plans Milestone	es Renewals Supplemental Data Go To More	✓
Save Return to Search		Add Update/Display
General Lines Amendments		

4. Click the **Lines** tab.

Favorites 🗸	Mair	Menu - Customer Contract	s 🗸 > Create and An	nend v > C	General Informatio	n					
Ge <u>n</u> eral	Lines	Amendments							Related Content 🔻	New Window	Help Personal
Contract Number 00000001998 Sold To Customer PIEDMONT CONCRETE CONTRACTORS INC.											
Α	mendmen	t Number 000000000		Contract Sta	atus ACTIVE						
	Amend Cor	ntract									
Contract	Lines 🥐						Personalize Find	l View All 💷 🔣	First 🕚 1 o	f 1 🕑 Last	
<u>G</u> eneral	Detail	Billing Amount Details Revenue	Amount Details								
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Custo	
		1 MG&SE_CON34_100	Misc - CON - State Ag	Rate	Ready	Ready	Contract Terms	Distribution	Internal Notes	PIEDMONT (CONTRACT(
					<					>	
Billing Plans		Revenue Plans Milesto	nes Renewa	IIS		Supplem	ental Data Go T	More	~		
🔚 Save 🔯 Return to Search 🖸 Notify											
General Line	es Amend	ments									

- 5. Click the **Details** tab.
- 6. Click the **Contract Terms** link.



	enu 👻 🔰 Cusio	mer Contracts 👻 🔅	 Create and Amend - 	> Gen	eral Information	> Contract	Terms			
Deleted Designate										
Related Projects Contr	ract Amendments									
Contract Num	nber 0000001998		Sold To (Customer	PIEDMONT CONC	RETE CONTR	RACTORS INC.			
Amendment Num	nber 0000000000		Contra	ct Status	ACTIVE					
Contract L	ine ┥ 1 🕨		P	rice Type	Rate					
Prod	uct MG&SE_CONS	34_100								
Descript	tion Misc - CON - S	tate Agency								
Amend Contract										
PC Business Unit 50100										
Billing	Limit 10	,000.00	Transaction Limits		Review L	imits				
Revenue	Limit 10	000.00	Perform Limit Checking							
Diegou	int ID	,000.00	Retainage ID							
Discou	int iD				Tiesed Driving					
Associated Dates				Deer	nered Pricing	l rint (
Associated Rates				Pers	sonalize Find G	- First	P 1 of 1 ⊕ La	ISI		
Effective Date 9	Status	Rate Selection		Rate Set						
1 09/02/2019 🛐 [Active 🗸	Rate Set	~	MG&SE	_CON34_100 Q	Rate Set	+ -			
Associated Projects & Activities Personalize 🖾 First 🕔								ast		
*Project *Activity Description				Descri	ption					
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	2	Q Rural Additions	Rittsylvania	PE/Cor	str - Constr on PE	Job				

7. The **Related Project** tab displays. Click the **Amend Contract** button.



Favorites 🔻	Main M	Menu 👻 > Customer C	ontracts 🔹 🗧 Create and Amer	nd 🔻	> General Informa	tion > Cor	ntract Terms		
Related Pro	ojects Con	ntract Amendments							Related Content 👻   New Windo
	Contract N	umber 0000001998	B Sold	To Ci	ustomer PIEDMONT	CONCRETE C	CONTRACTO	RS INC.	
	View Current			ontrac	T Status ACTIVE				
Amendme	ents			P	ersonalize   Find   Vi	ew All   🖉	First	🕢 1-2 of 2 🕑 Last	
General	<u>S</u> tatistics	Billing Amended Amounts	Revenue Amended Amounts	Miso	. 💷				
Amendment	Amen	idment Type	Reason		Process Date	Amendment Status	Detail	Notes	
0000000000					09/04/2019	Complete	Detail	Notes	
0000000001	Cont	tract Terms 🗸 🗸	Modify Contract Amt	V	09/04/2019	Pending	Detail	Notes	
Return to Ger	neral Informat	tion							
Save	Return to	Search 🔄 Notify 🕄	Refresh					🖉 Update/Display	JInclude History Correct History
Related Proje	ects   Contract	t Amendments						4()	

- 8. The **Contract Amendments** tab displays. For this scenario, we are modifying the contract amount.
- 9. Click the **Amendment Type** drop-down menu.
- 10. Select Contract Terms.
- 11. Click the **Reason** drop-down menu.
- 12. For this scenario, Modify Contract Amt.
- 13. Click the **Save** button.
- 14. Click the **Related Projects** tab.



#### The Related Project tab displays.

Favorites -	Main M	lenu 🗸	> Custor	mer Contracts 👻	>	Create and Amend -	> Ger	neral Information	> Contrac	t Terms		
Related Projects	Cor	ntract Am <u>e</u> nc	ments									
Cont	ract Nu	mber 0000	001998		ŀ	Sold To C	ustomer	PIEDMONT CON	CRETE CON	TRACTOR	RS INC.	
Amendn	nent Nu	mber 0000	000000			Contrac	ct Status	ACTIVE				
Co	ontract	Line 🔌 1	•			Pri	ice Type	Rate				
	Pro	duct MG&	SE CON3	4 100								
	Descri	otion Misc	- CON - St	ate Agency								
Amend Contract												
PC Business Unit 50100												
	Billin	a Limit	10	.000.00		Transaction Limits		Review	Limits			
_						Perform Lim	it Checkir	ng				
F	Revenu	e Limit	10,	,000.00								
	Disco	ount ID				Retainage ID						
						Tiered Pricing		Tiered Pricing				
Associated Rate	es						Per	sonalize   Find   🖓	First	🕙 1 of 1	Last	
Effective Date		Status		Rate Selection			Rate Set					
1 09/02/2019	31	Active	~	Rate Set		~	MG&SE	_CON34_100 Q	Rate Set		+ -	
Associated Pro	ssociated Projects & Activities Personalize   🖾 First 🕚 1-25 of 28 🕑 Last											
*Project	*,	Activity		Description			Descri	iption				

O 0000100001 Q 786	Q Rural Addit	ions - Pittsylvania	Noise Abatement	+ -
O 0000100001 Q 787	Q Rural Addit	ions - Pittsylvania	Natural Resources Studies	+ -
Create Project	Create Activity	All Activities	Summary Activities	Delete Activities
Return to General Information				
			Amount Allocation	
Save Return to Search	Notify 2 Refresh		🖉 Update/Display 🛛 🗾 Include I	History Correct History
Related Projects   Contract Amend	ments			

15. Click the **Amount Allocation** link at the bottom of the page.



The Amendment Billing Allocation page displays.

Favorites - N	/lain Menu 🗸	> Cus	tomer Contracts 👻	> Create and	Amend 🗸 > General Ir	formation > Contra	act Terms > Am	endment Amo	unt Allocation
Amendment Billing	Allocation								
	ontract 00000	04000							
Busine	ess Unit 50100	)				Amendment	000000001		
	Sold To 00000	000001	PIEDMONT CO	NCRETE CONT	RACTORS INC.	Amendment Type	Contract Terms		
Cu	rrency USD					Amendment Reason	Modify Contract Am	nt	
									1
Contract Billing	(?)								-
	Total Billing A	Adjustmen	t	5,000.00		Unallocated Billing		0.00	
Tota	Billing After	Adjustmen	t	10,000.00					
Fixed Billing 👔									_
	Fixed Billing A	Adjustment	1	0.00	Unallocated	Fixed Billing	0.00	)	
	Discount /	Surcharge	9	0.00	Inclusive Prepaid	Adjustment	0.00	)	
	Net	Adiustmen		0.00		Allocation Incomple	te 🗸	1	
				0.00				1	Recalculate
Contract Line Pri	icing 🕐					Persona	alize   Find   💷	First	🕙 1 of 1 🕑 Last
Amounts Deta	il								
Retrieve Billing Price	ine Number	Product			Current Billing Limit	New Billing Limit Adjust	ment Billing Limit	Limit	Check
1	1	MG&SE_C	CON34_100		10,000.00	15000.00		Limit	Check
Select All	Clea	ar All							Recalculate
Adjustment Line	Totals 🕐								
	Billing A	Amount	O	.00	Recurring Billing	0.0	0		
C	)iscounts/Surc	harges	C	.00	Billing Limit	0.0	0 Total	Billing	0.00
Prepaids									
Return to Contract Te	erms								
Save Ret	in to Search	Notify	4						
	un to cearch	_ Noui	,						

- 16. For this scenario, the billing limit is being changed.
- 17. Click in the Total Billing Adjustment field.
- 18. Enter the adjustment amount. For this scenario, **\$5,000.00**.
- 19. In the New Billing Limit field enter the total amount which is the Current Billing Limit + Total Billing Adjustment Amount. For this scenario, \$15,000.00 (\$10,000.00 + \$5,000.000 = \$15,000.00).
- 20. Click the **Recalculate** button.



Favorites  Main Menu  Customer C	ontracts 👻 > Create and An	nend 🗸 > General In	formation > Contract Te	rms > Amendment.	Amount Allocation
Amendment Billing Allocation					
Contract 0000001998					
Business Unit 50100			Amendment 0000	000001	
Sold To 000000001 PIE	DMONT CONCRETE CONTRA	CTORS INC.	Amendment Type Cont	fact lerms	
Currency USD			Amendment Reason Modi	ty Contract Amt	
Contract Billing ②					
Total Billing Adjustment	5,000.00		Unallocated Billing	0.00	
Total Billing After Adjustment	15 000 00				
	10,000.00				
Fixed Billing ?					
Fixed Billing Adjustment	0.00	Unallocated	Fixed Billing	0.00	
Discount / Surcharge	0.00	Inclusive Prepaids	Adjustment	0.00	
Net Adjustment	0.00		Allocation Complete	$\sim$	Desclaster
					Recalculate
Contract Line Pricing ②			Personalize	Find   🖓   🔣 Fi	irst 🕚 1 of 1 🕑 Last
Amounts Detail					
Price Line Number Product		Current Billing Limit	New Billing Limit Adjustment	Billing Limit	Limit Check
1 MG&SE_CON34_	100	10,000.00	15,000.00	5,000.00	_imit Check
Select All Clear All					Recalculate
Adjustment Line Totals (?)					
Billing Amount	0.00	Recurring Billing	0.00		
Discounts/Surcharges	0.00	Billing Limit	5,000.00	Total Billing	5,000.00
Prepaids					
Return to Contract Terms					
Save Return to Search					

- 21. The Allocation field changes from Incomplete to Complete.
- 22. Click the **Save** button.
- 23. Click the **Return to Contract Terms** link.



Favorites - Main Menu	<ul> <li>Custome</li> </ul>	r Contracts 👻 🚿	Create and Amend $\checkmark$	> General Information > Contract Terms							
Related Projects Contract	t Am <u>e</u> ndments										
Contract Numbe	er 0000001998 er 0000000000		Sold To C Contrac	Customer PIEDMONT CONCRETE CONTRACTORS INC.							
Contract Line Produc Descriptior	Contract Line     Image: 1 minipage in the image in the i										
Amend Contract PC Business Unit 50100											
Billing Lin Revenue Lin Discount	nit 10,00 nit 10,00 ID	00.00	Transaction Limits Perform Lim Retainage ID	Review Limits							
Associated Dates			Tiered Pricing	Tiered Pricing							
Effective Date Sta	tus Ra	te Selection		Rate Set							
1 09/02/2019 🛐 Ac	1 09/02/2019 🛐 Active V Rate Set V MG&SE_CON34_100 Q Rate Set 🛨 🖃										
Associated Projects & Ac	Associated Projects & Activities Personalize   🖾 First 🕚 1-25 of 28 🕑 Last										
*Project *Activ	ity			Description							

#### 24. Click the Contract Amendments tab.

Favorites -	Mair	n Menu 👻 > Customer C	Contracts $\checkmark$ > Create and Ame	nd 🔻	> General Info	ormation > C	ontract Terms				
Related Pro	piects C	ontract Amendments							Related Content -	New Window H	lelp   Person
Ar	Contract mendment	Number 0000001998 Number 0000000000	Solo	l To Ci ontrac	ustomer PIEDM t Status ACTIV	IONT CONCRETE	CONTRACTO	DRS INC.			
Amendme	mend Cont	ract		P	ersonalize   Find	1   View All   고	First	I-2 of 2 Last			
General	Statistics	Billing Amended Amounts	Revenue Amended Amounts	Mise	c. 💷						
Amendment	Am	endment Type	Reason		Process Date	Amendment Status	Detail	Notes			
00000000001	Cor	ntract Terms	Modify Contract Amt		09/04/2019	Pending	Detail	Notes			
000000000000000000000000000000000000000					09/04/2019	Complete	Detail	Notes			
Return to Ger	neral Inform	ation to Search 😰 Notify 🗜	Refresh					Update/Display	JInclude Histe	ory 📝 Correc	t History
Related Proje	ects   Contra	ict Amendments									

25. Click in the **Detail** link next to the amendment that was just added. It will have an **Amendment Status** of **Pending**.



Favorites -	Main Menu 🗸	> Customer Contracts	<ul> <li>Create and Amer</li> </ul>	nd 🗸 > General In	formation > Contract Term	s					
Amendm	nent Details										
	Contract	0000001998		Amendment Numbe	r 000000001						
S	Sold To Customer	000000001									
	Amendment Type	Contract Terms 🗸		*Process Dat	te 09/04/2019						
Am	nendment Reason [	Modify Contract Amt		*Amendment Statu	Cancelled Is Pending						
Total E	Billing Adjustment	5,000.00	Tota	Revenue Adjustme	at 5,000,00						
Fixed E	Billing Adjustment	0.00	Fixed	Revenue Adjustme	nt 0.00						
Fixed	Fixed Billing Allocation Complete Fixed Revenue Allocation Complete										
Addition	nal Amendment [	Details									
	Reference ID			User Ref #	¥1						
				User Ref #	<b>#2</b>						
Amendmen	nt Components				Personalize   Find   View All	🗵 🖩 First 🕙 1-2 of 2 🕑 Last					
General	Statistics										
Componer	nt	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value					
1 Amount A	llocation	Line 1	Billing Limit	Update	10000	15000					
2 Amount A	llocation	Line 1	Revenue Limit	Update	10000	15000					
Amendment A Return to Cont	mount Allocation tract Terms		Internal Notes								
🗟 Save	Return to Search	E Notify									

- 26. Confirm the Amendment Components.
- 27. Change the Amendment Status from Pending to Ready.

Favorites 🗸	Main Menu 🗸	> Customer Contracts	<ul> <li>Create and An</li> </ul>	nend 👻 > Genera	al Information > 0	Contract Terms			
Amendm	ent Details								
	Contract	0000001998		Amendment Nur	nber 0000000001				
S	old To Customer	000000001							
	Amendment Type	Contract Terms		Process	Date 09/04/2019	_			
Am	endment Reason	Modify Contract Amt	*Amendment Status Ready   Process Amendment						
Total B	illing Adjustment	5,000.00	То	tal Revenue Adjust	ment 5,000.00				
Fixed B	illing Adjustment	0.00	Fix	ed Revenue Adjust	ment 0.00				
Fixed	Billing Allocation	Complete	F	ixed Revenue Alloc	ation Complete				
Addition	al Amendment I	Details							
	Reference ID			User F	lef #1				
				User F	Ref #2				
Amendmen	t Components				Personalize   F	ind   View All   💷   🔢	First 🕚 1-2 of 2 🕑 Last		
General	Statistics								
Componen	nt	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value			
1 Amount A	llocation	Line 1	Billing Limit	Update	10000	15000			
2 Amount A	llocation	Line 1	Revenue Limit	Update	10000	15000			
			Internal Notes						
Return to Cont	ract Terms								
🔚 Save 🔯	Return to Search	E Notify							

28. The Process Amendment button displays.



#### 29. Click the Process Amendment button.

Favorites - Ma	ain Menu 🔻	> Customer Contra	acts 🔹 > Create and Ar	mend 🔻 > General In	formation >	Contract Terms				
Amendment I	Details									
	Contract	0000001998		Amendment Number 000000001						
Sold To	Customer	0000000001	Ame	Amendment Completed On 09/05/2019 8:22AM						
Amon	Imont Tuno	Contract Torms		D D						
Amendm	ent Reason	Modify Contract Amt		Amendment Statu	Is Complete					
		·								
Total Billing	Adjustment	5,000.00	То	otal Revenue Adjustme	nt 5,000.00					
Fixed Billing	Fixed Billing Adjustment 0.00			Fixed Revenue Adjustment 0.00						
Fixed Billing	Allocation	Complete	F	ixed Revenue Allocatio	n Complete					
Additional An	nendment	Details								
B	oforonco ID			Llear Doft	#4					
K	elerence ID			User Rei	71					
				User Ref	#2					
Amendment Con	nponents				Personalize	Find   View All   🔄   🔣	First 🕚 1-2 of 2 🕑 Last			
General Statist	ics 💷									
Component		Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value				
1 Amount Allocatio	n	Line 1	Billing Limit	Update	10000	15000				
2 Amount Allocatio	n	Line 1	Revenue Limit	Update	10000	15000				
			Internal Notes							
Return to Contract Te	erms									
🔚 Save 🛛 🔯 Retu	rn to Search	E Notify								

30. The Amendment Status updates to Complete. The Contract Terms have been successfully amended for the contract.



#### **Increase/Decrease Prepaid Amount**

1. Navigate to the **General Information** page using the following path:

Main Menu > Customer Contracts > Create and Amend > General Information

_____

Favorites 🗸	Main Menu 👻 >	Customer Contracts -	· >	Create and Amend - General Information						
General Infor	mation									
Enter any information you have and click Search. Leave fields blank for a list of all values.										
Find an Exist	Find an Existing Value									
Search Cri	iteria									
Busines	ss Unit = 🗸 5	0100	Q							
Co	ontract begins with 🗸 0	000000061								
Desc	ription begins with 🗸									
Sold To Cus	stomer begins with 🗸		Q							
Customer	Name begins with 🗸									
Contract	Status begins with 🗸		Q							
Processing	Status = 🗸			~						
Contrac	t Type begins with 🗸		Q							
Contract Classifi	ication = 🗸			$\checkmark$						
Region	Code begins with 🗸		Q							
Contract Admini	strator begins with 🗸		Q							
Master Con	tract # begins with 🗸		Q							
Case Sensiti	ive									
Limit the number	of results to (up to 300):	300								
Search Clear Basic Search Citeria										
Find an Existing	Value   Add a New Value	9								

- 2. Enter the Contract number in the **Contract** field that needs to be amended.
- 3. Click the **Search** button.



Favorites -	Main Menu 👻 >	Customer Contracts ->	Create and Amend	→ Gener	al Information					
							Relate	d Content 🔫 📔	New Window	Help P
General Li	nes Am <u>e</u> ndments									
	Contract Number	000000061			Sold To Customer					
	Amendment Number	000000000			contract status / k	51112	~			
	Am	end Contract			Add to My Contracts	S				
	Description Contract Admin	Asphalt Strengthening	Q		Processing Status A	ctive				
	Pagion Code				Rusinees Unit V	A Dopt of Transportatio				
	Contract Type	٨			Contract Classification	tandard				
	Currency Code				Start Date 0	7/29/2011				
	Exchange Rate Type	CRENT			End Date					
	Contract Signed	07/20/2011			Last Update Date/Time 1	1/15/2011 12:12:27PM				
	Contract Signed	01123/2011		Separate	Last Update User ID V	_CONV_LOAD				
	Revenue Profile		s	eparate As Inc	urred Billing and Revenue:					
Us	se Project ChartFields: 占	$\checkmark$			-					
Other Info	ormation									
Summary	of Amounts 🕐						Attachmen Billing Opti Conversati	ls ons ons		
Billing Plans	Revenue Plans	Milestones	Renewals		Suppleme	ental Data Go	To Revent T	erms		
General   Lines	Return to Search	] Notify					Price Adjus Progress P Revenue F Sales Orde Service On Sold To Ad Support Te View Force	itments 'ayments orecast ir ders Idress iams cast	pda	te/Display

- 4. Click the **More** drop-down button.
- 5. Select **Prepaids** from the list.

	Main Menu 🗸	> Custor	mer Contracts 👻 🚿	Create and Amend -	> General Informat	ion > Prepa	id Balances
Prepaids	Audit <u>H</u> istory Ame	ndments					
	Contract Number 00	00000061		Sold To Custom	er WISE COUNTY		
An	mendment Number 00	00000000		Contract Stat	us ACTIVE		
Contract P	repaid Totals						
F	Purchased Amount		870,000	.00			
F	Remaining Amount		0.	00			
C	Committed Amount		0.	.00			
		Amend	Contract				
Prepaids fo	or this Contract	Amend	Contract	F	Personalize   Find	🛛   🔣 First	(1) of 1 (1) Last
Prepaids for General	or this Contract	Amend (	Contract	n [TTT)	Personalize   Find	🛛   🔜 First	④ 1 of 1 ④ Last
Prepaids for General Actions	or this Contract Utilization Initial Bil Status	Amend ( ling <u>C</u> ont Hold	Contract ract Liability Distributio Purchased Amount	F Remaining Amount	Personalize   Find	Expiration Date	1 of 1  Last     Depleted Dat
Prepaids for General Actions	this Contract Utilization Initial Bil Status 1 Ready	Amend (	Contract ract Liability Distributio Purchased Amount 870,000.00	Remaining Amount 0.00	Personalize   Find   Committed Amount 0.00	Expiration Date	I of 1 Last       Depleted Dat       11/01/201
Prepaids for General Actions • Actions	this Contract Utilization Initial Bil Status 1 Ready	Amend ( ling Cont Hold	Contract ract Liability Distributio Purchased Amount 870,000.00	Remaining Amount	Personalize   Find   Committed Amount 0.00	Expiration Date	④ 1 of 1
Prepaids for General Actions Actions 30 To:	Der this Contract Utilization Initial Bil Status 1 Ready K Billing Plans	Amend (	Contract ract Liability Distributio Purchased Amount 870,000.00	Remaining Amount 0.00	Personalize   Find   Committed Amount 0.00	Expiration Date	<ul> <li>④ 1 of 1</li></ul>
Prepaids for General Actions • Actions Go To: Return to Gene	Der this Contract Utilization Initial Bil Status 1 Ready Billing Plans eral Information	Amend (	Contract ract Liability Distributio Purchased Amount 870,000.00	Remaining Amount	Dersonalize   Find   Committed Amount 0.00	Expiration Date	1 of 1  Last     Depleted Dat     1/01/201     >
Prepaids for General Actions Actions 30 To: Return to General Return to General Return to General Return to General	Der this Contract Utilization Initial Bil Status 1 Ready Billing Plans eral Information The Search	Amend (	Contract ract Liability Distributio Purchased Amount 870,000.00	Remaining Amount 0.00	Personalize   Find   Committed Amount 0.00	Expiration Date	<ul> <li>④ 1 of 1</li></ul>

6. Click the **Amend Contract** button.



Favorites 👻	Main Menu 🗸	> Customer C	Contracts $ ightarrow$	Create and Amer	nd 👻	> General Info	ormat	ion > Pre	paid Balance	S	
Prepaids	Audit <u>H</u> istory Amen	dments									Relate
Contract Number 0000000061 Sold To Customer WISE COUNTY											
Pene	Pending Amendment 0000000001 Contract Status ACTIVE										
View Current											
Amendments Personalize   Find   View All   🔄   🔣 First 🕚 1-2 of 2 🕑 Last											
General	Statistics Billing Am	ended Amounts	Revenue Am	ended Amounts	Misc						
Amendment	Amendment Type		Reason			Process Date		Amendment Status	Detail	Notes	
0000000000						11/15/2011		Complete	Detail	Notes	
000000001	Prepaid	~	Amend Prepa	aid	~	08/21/2019	Ħ	Pending	Detail	Notes	
Return to General Information											
Return to Search Notify Previous tab											
Prepaids   Audi	t History   Amendments										

- 7. The Amendment Type, select Prepaid.
- 8. In the **Reason** field, select **Amend Prepaid**.
- 9. Click the **Save** button.
- 10. Click the **Prepaids** tab.



				-				
Favorites -	Main Menu 👻	> Cus	stomer Contracts 👻	> Cre	ate and Amend 👻 🚿	General Informat	ion > I	Prepaid Balances
Prepaids /	Audit History A	mendments						
		_		_				
	Contract Number	0000000061			Sold To Customer	WISE COUNTY		
Denr	ding Amendment	0000000001			Contract Status	ACTIVE		
					oonnaor olalao			
Contract Pro	naid Totale							
Contractifie	ipalu rotais							
Pu	rchased Amount		870	000.00				
Re	emaining Amount			0.00				
Co	mmitted Amount			0.00				
		Vie	w Current					
							a. 📖	
Prepaids for	this Contract				Per	sonalize   Find   🗳		First 🖤 1 of 1 🖤 Last
General U	<u>J</u> tilization <u>I</u> nitial	Billing C	ontract Liability Distri	bution	<b></b> )			
Actions	Status	Unid	Durahanad Am		Demoising Amount	Committed Amount	Euroisetian I	Dete Depleted De
Actions	Status	HOID	Purchased Ame	ount i	Remaining Amount	Committee Amount	Expiration	Depleted Da
- Actions	1 Ready		900.000	0.00	0.00	0.00		11/01/201
7 10 110 110		<u> </u>	000,000		0.00	0.00		>
								7
Go To: F	Billing Plans							
Return to Genera	ai information							
Save of	h Return to Search	Noti	v 🖵 Previous ta	b 📮	Next tab		<b>.</b> A	Add // Update/Display
	totam to obarer			-	TOTA LOD		<b>••</b>	22 opdator bropidy
Prepaids   Audit	History   Amendm	ents						

11. Update the amount in the **Purchased Amount** field.

You can increase or decrease the Prepaid Amount in this field.

For this example, we increased the **Purchased Amount** to **900,000**. If you wanted to decrease the prepaid from **\$870,000** to **\$**800,000.00, you would enter **\$**800,000.00 in the **Purchased Amount** field.

- 12. Click the **Save** button.
- 13. Click the Amendments tab.



Favorites - Main Men	u 🗸 🚽 > Customer Co	ntracts $ ightarrow$ > Create and Amer	nd 👻	> General Informat	tion > Prepa	aid Balances				
Prepaids Audit <u>H</u> istory	Amendments							Rela		
Contract Number 0000000061 Sold To Customer WISE COUNTY										
Pending Amendment 0000000001 Contract Status ACTIVE										
View Current										
Amendments Personalize   Find   View All   🖾   🎚 First 🕚 1-2 of 2 🕑 Last										
General Statistics Bi	illing Amended Amounts	Revenue Amended Amounts	Misc							
Amendment Amendme	ent Type	Reason		Process Date	Amendment Status	Detail	Notes			
000000000				11/15/2011	Complete	Detail	Notes			
0000000001 Prepaid	~	Amend Prepaid	~	08/21/2019	Pending	Detail	Notes			
Return to General Information	Return to General Information									
Return to Search E Notify Previous tab										
Prepaids   Audit History   Amer	ndments									

14. Click the **Detail** link next to the **Pending** amendment.

Favorites -	Main Menu 👻	> Customer Contracts	<ul> <li>Create and Amer</li> </ul>	nd 👻 > General In	formation > Prepaid Balan	ces
Amendm	ent Details _{Contract}	000000061		Amendment Numbe	r 000000001	
S	old To Customer	0000003006				
ر Am	Amendment Type endment Reason	Prepaid     V       Amend Prepaid     V		*Process Da *Amendment State	te 08/21/2019 (5) Cancelled Is Pending Ready	
Total B	illing Adjustment	0.00	Tota	Revenue Adjustme	nt 0.00	
Fixed B	illing Adjustment	0.00	Fixed	Revenue Adjustme	nt 0.00	
Fixed	Billing Allocation	Incomplete	Fixe	d Revenue Allocatio	on Incomplete	
Addition	al Amendment	Details				
	Reference ID			User Ref User Ref	#1	
Amendmen	t Components				Personalize   Find   View /	All 🔄 🔣 First 🕙 1 of 1 🕑 Last
General	Statistics					
Componen	t	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Prepaids		Prepaid Seq 1	Purchased	Update	870000	900000
Amendment Ar Return to Prep:	nount Allocation aid Balances Return to Search	Notify	Internal Notes			

- 15. Confirm the Amendment Components.
- 16. The Amendment Details page displays.
- 17. Click the drop-down menu button for the Amend Status field.
- 18. Select the **Ready** option.



Favorites - Main Menu -	> Customer Contracts	<ul> <li>Create and Amer</li> </ul>	nd 👻 > General Ir	nformation >	Prepaid Balances				
Amendment Details									
Contract	000000004		A man day and Marsh						
Contract	000000061		Amendment Numb	er 0000000001					
Sold To Customer	0000003006								
Amendment Type	e Prepaid		Process Da	ate 08/21/2019					
Amendment Reasor	Amend Prepaid		*Amendment Stat	us Ready	$\sim$	Process Amendment			
Total Billing Adjustmen	Total Billing Adjustment     0.00     Total Revenue Adjustment     0.00								
Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00									
Fixed Billing Allocation	Incomplete	Fixe	ed Revenue Allocati	on Incomplete					
Additional Amendment	Details								
Reference II	)		User Ref	#1					
			User Ref	#2					
American descent Commences					man a la companya				
General Statistics				Personalize	Find   View All	E E E First V 1 of 1 V Last			
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	Ne	w Value			
1 Prepaids	Prepaid Seq 1	Purchased	Update	870000	90	0000			
		Internal Notes							
Return to Prepaid Balances									
Save Return to Search	n E Notify								

- 19. The **Process Amendment** button displays.
- 20. Click the Process Amendment button.

Favorites - Main Menu	· → Customer Contracts		nd 👻 > General Inf	ormation > Prepaid Balan	ces
Amendment Detail	s				
Contra	ct 000000061		Amendment Number	r 0000000001	
Sold To Custom	ner 0000003006	Amend	ment Completed On	08/21/2019 8:11AM	
Amendment Type Prepaid Process Date 08/21/2019					
Amendment Reason Amend Prepaid Amendment Status Complete					
Total Billing Adjustment     0.00     Total Revenue Adjustment     0.00					
Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00					
Fixed Billing Allocat	tion Incomplete	Fixe	d Revenue Allocatio	n Incomplete	
Additional Amendme	ent Details				
D. f	- 10		11 D-64		
Reference	e ID		User Ret #	1	
			User Ref #	2	
Amendment Componen	ts			Personalize   Find   View A	All   🗖   🔜 🛛 First 🕚 1 of 1 🕑 Last
General Statistics					
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Prepaids	Prepaid Seq 1	Purchased	Update	870000	900000
Potura to Brogoid Balancoa		Internal Notes			
Return to Frepald Balances					
Return to Sea	arch 🔚 Notify				

21. The **Amend Status** changes to **Complete**. The amendment for Prepaid status has been successfully updated.



#### **Increase/Decrease Amount Based Contract Amount**

1. Navigate to the **General Information** page using the following path:

Main Menu > Customer Contracts > Create and Amend > General Information

_____

Favorites - Main Menu -	> Customer Contracts -	> Create and Amend -> General Information							
General Information									
Enter any information you have and click Search. Leave fields blank for a list of all values.									
Find an Existing Value         Add a New Value									
Search Criteria									
Business Unit = 🗸	50100	۵.							
Contract begins with V	0000001990								
Description begins with 🗸									
Sold To Customer begins with 🗸		2							
Customer Name begins with 🗸									
Contract Status begins with		۵							
Processing Status = V		~							
Contract Type begins with V		Q							
Contract Classification =		<u> </u>							
Region Code begins with V									
Contract Administrator begins with									
Master Contract # begins with V		2							
Limit the number of results to (up to 20	0)- 200								
Limit the number of results to (up to 50	550								
Search Clear Basic Sear	ch 📴 Save Search Criteria	a							
Find an Existing Value   Add a New Va	lue								

- 2. Enter the Contract number in the **Contract** field.
- 3. Click the **Search** button.



#### The General Information page displays.

Favorites - Main Menu - >	Customer Contracts ->	Create and Amend -	> General Information			
						New Window   Help   Pers
General Lines Amendments						
Contract Number	r 0000001990		Sold To Customer	CENTRAL VA COMMUNIT	Y COLLEGE	
Amendment Number	r 000000000		*Contract Status	ACTIVE	×Q	
Ar	mend Contract		Add to My Contra	icts		
Description	Other - Amount Based		Processing Status	Active		
Contract Admir	ו	Q	Amendment Status	Complete		
Region Code	e		Business Unit	VA Dept of Transportation		
Contract Type	e O		Contract Classification	Standard		
Currency Code	e USD		Last Update Date/Time	08/13/2019 1:36:47PM		
Exchange Rate Type	e CRRNT		Last Update User ID	SHELLY.PRYOR		
Contract Signed	1 08/13/2019	Sepa	separate Fixed Billing and Revenue: rate As Incurred Billing and Revenue:			
Contract Role	9					
Revenue Profile	e					
Use Project ChartFields:						
Other Information						
Summary of Amounts (2)						
Billing Plans Revenue Plans	Milestones	Renewals	Supplen	mental Data Go To	More	~
Save or Return to Search	Notify				(	🔒 Add 🛛 🖉 Update/Display
General   Lines   Amendments						

#### Click the Lines tab. 4.

Favorites  Main Menu  Custome	er Contracts $\checkmark$ > Create and Amend	<ul> <li>General Information</li> </ul>							
Caparal Linas Amandmanta					New Window Help Persor				
Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE									
Amendment Number 0000000000	Amendment Number 0000000000 Contract Status ACTIVE								
Amend Contract									
Contract Lines ?			Personalize	Find   View All   🔄	First 🕚 1 of 1 🕑 Last				
General Detail Billing Amount Details	Revenue Amount Details Contract Li	iability 📖							
Actions Line Product	Description Price Type	Standalone Sale Bundle	Start Date	End Date Stat	tus Supplemental Data				
- Actions 1 AMT_PROJE81	Partic- HMO - CCT - Ri Amount		QB	Act	ive Supplemental Data				
Billing Plans Revenue Plans	Milestones Renewals		Supplemental Data	Go To More	$\checkmark$				
Save C Return to Search Notify					Add // Update/Display				

5. Click the Amend Contract button.



Favorites •         Main Menu •         >         Customer Contracts •         >         Create and Amend •         >         General Information									
General Lines Amendments									
Contract Number 0000001990 Bold To Customer CENTRAL VA COMMUNITY COLLEGE									
Pending Amendment 0000000001	Contrac	ct Status ACTIVE							
View Current									
Amendments Personalize   Find   View All   🖉   🎚 First 🕚 1-2 of 2 🕑 Last									
General Statistics Billing Amended Amounts	Revenue Amended Amounts Mis	c. 💷							
Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes				
00000000		08/13/2019	Complete	Detail	Notes				
000000001 Contract Line	Modify Contract Line 🗸	08/21/2019	Pending	Detail	Notes				
Billing Plans Revenue Plans Milestones Renewals Amount Allocation Supplemental Data Go To More V									
Return to Search									
General   Lines   Amendments									

- 6. Select the Amendment Type using the Amendment Type drop-down.
- 7. Select the **Amendment Reason** using the **Reason** drop-down.
- 8. Click the **Save** button.
- 9. Click the **Amount Allocation** link.

Rendment Billing Allocation         New Window         Help         Personalize Page         I           Contract 0000001900 Business Unit 50100 Sold To 0000000120 Currenty USD         CENTRAL VA COMMUNITY COLLEGE         Amendment Type         Contract Line Amendment Reason         Modify Contract Line Amendment Reason         Modify Contract Line           Contract Billing Collegities Adjustment         50,000,00         Unallocated Billing         0,00         Exceeded	Favorites -	Main Me	nu 🗸 🚽 > Custo	mer Contracts 👻 🔿	Create and A	mend 🗸 > G	eneral Information	> Amendment A	Amount Alloca	ation		
Allending Contract log Opponent Sinchards Sinc	Amondmont	Pilling Alloc	ation								r	New Window   Help   Personalize Page
Buildings full: Sold To 000000120 CENTRAL VA COMMUNITY COLLEGE Amendment Type Contract Line   Contract Billing Adjustment Unallocated Billing 0.00   Fixed Billing Adjustment 0.00 0.00   Fixed Billing Adjustment 0.00 0.00   Discount / Surcharge 0.00 0.00   Net Adjustment 0.00 Allocation Incomplete   Contract Line Fricing Personalize   Find   Discount / Surcharge 0.00   Billing Ariout 0.00 Allocation Incomplete   Retrieve Souto 0 5000000 0 0   Souto 0 5000000 0 0 0   Select Al Current 0.00 Billing Amount   Adjustment - Clear Al 0.00 Billing Amount 0.00   Select Al 0.00 Billing Amount 0.00   Select Al 0.00 Billing Amount 0.00   Billing Amount 0.00 Billing Amount 0.00   Select Al 0.00 Billing Lintl 0.00   Select Al 0.00 Billing Amount 0.00   Select Al 0.00 Billing Lintl 0.00   Select Al 0.00 Billing Lintl 0.00   Select Al 0.00 Billing Lintl 0.00	Amenument	Contract	0000001000									
Sold To         O00000120 Urgency         CENTRAL VA COMMUNITY COLLEGE         Amendment Type         Contract Line           Currency         USD         Centract Additional Contract Line         Amendment Reason Modify Contract Line           Contract Billing ()         Usallocated Billing         0.00         0.00           Fixed Billing Adjustment         50,00.00         Unallocated Billing         0.00           Fixed Billing Adjustment         0.00         Unallocated Fixed Billing         0.00           Discount / Surcharge         0.00         Allocation Incomplete         0.00           Net Adjustment         0.00         Allocation Incomplete         0.00           Contract Line Fricing @         Current Meere Billing Anount         Adjust Berling         Alignet Reenvelow         Reenvelow         Net Ref @ insulate Billing Pricing         Inclusive Prepaids Adjustment         0.00         0.00         0.00         0.00         Inclusive Prepaids Adjustment         0.00         Reenvelow         Reenvelo		Business Uni	t 50100				4	mendment 00000	00001			
Curreny USD       Amendme Reason Modity Contract Line         Contract Dilling @       0.00         Total Billing Adjustment       0.000.00         Fixed Billing @       0.00         Fixed Billing @       0.00         Discourt/ Surcharge       0.00         Net Adjustment       0.00         Billing Adjustment       0.00         Net Adjustment       0.00         Reference Pricing @       First @ life(Adjustment Adjustment Ad		Sold To	000000120	CENTRAL VA CO	MMUNITY COL	LEGE	Ameno	Iment Type Contra	ct Line			
Contract Billing @       Unallocated Billing       0.00         Fixed Billing Adjustment       50,000.00       0.00         Fixed Billing Adjustment       0.00       0.00         Discount Surcharge       0.00       Inclusive Prepaids Adjustment       0.00         Net Adjustment       0.00       Allocation Incomplete       0.00         Natourts       0.00       Allocation Incomplete       0.00         Retrieve Billing Pricing       New Melling Anount       Adjustment       Adjust Billing Anount       Reverse       Discount/Surcharge       1 of 1 © Last         Retrieve Billing Pricing       Anounts       Contract Melling Anount       Adjust Billing Anount       Reverse       Discount/Surcharge       New Melling Simulate Billing Pricing         I       ANT_PROJES1       60.000.00       50.000.00       Inclusive Prepaids       Discount/Surcharge       New Melling Anount         Adjustment Line Totals @       Contract Milling Anount       Adjust Billing Anount       Reverse       Discount/Surcharge       New Melling Pricing         Adjustment Line Totals @       0.00       Billing Linit       0.00       Total Billing 0.00       Surdia Billing Pricing       0.00         Prepaids       0.00       Billing Linit       0.00       Total Billing       0.00       Surdia		Currency	USD				Amendm	ent Reason Modify	Contract Lin	e		
total Billing Adjustment         0.00           Fixed Billing Adjustment         0.000           Fixed Billing Adjustment         0.000           Discount / Surcharge         0.000           Net Adjustment         Adjustment           Amounts         Cesard           Retrice Nume         Product           Select AI         50,000.00           Select AI         Clear AI           Clear AI         0.00           Billing Amount         0.00           Oilso         Billing Amount           0.00         Recurring Billing           Oilso         0.00           Billing Amount         0.00           Oilso         Billing Initit           Oilso         Billing Init           Oilso	Contract B	Billing 🕐										
Total Billing After Adjustment         50,000.00           Fixed Billing Adjustment         0.00         Unallocated Fixed Billing         0.00           Discount / Surcharge         0.00         Inclusive Prepaids Adjustment         0.00           Net Adjustment         0.00         Atlocation Incomplete         Recalculate           Contract Line Pricing         0         Atlocation Incomplete         Recalculate           Amounts         Detal         Presonalice         First <1 of 1		Total	Billing Adjustment				Unalloca	ted Billing		0.00		
Fixed Billing @       Fixed Billing Adjustment       0.00       Unallocated Fixed Billing       0.00         Discount / Surcharge       0.00       Inclusive Prepaids Adjustment       0.00       Recaluate         Contract Line Pricing @       Recaluate       Recaluate       Recaluate         Amounts       Detal       Retrieve Line Product       Billing Amount       Adjustment       Adjust Billing Adjustment       Retroactively       Reverse       Discount/Surcharge       New Billing Pricing       Simulate Billing Pricing       Simulate Billing Pricing       Simulate Billing Pricing       Billing Amount       Retroactively       Reverse       Discount/Surcharge       New Billing Pricing       Simulate Billing		Total Billing	g After Adjustment	ŧ	50,000.00							
Fixed Billing Adjustment       0.00       Unallocated Fixed Billing       0.00         Discount / Surcharge       0.00       Inclusiv Prepaids Adjustment       0.00         Net Adjustment       0.00       Allocatio [incomplete]       Recurimele       Recurimele         Contract Line Pricing       Currrent       0.00       Adjustment       Adjust Revenue       Reverse       Discount/Surcharge       New Mei Sinulate Billing Pricing       Image: Sinulate Billing       Image: Sinulate Billing       Image: Sinulate Billing	Fixed Billin	ng 🕐										
Discount / Surcharge       0.00       Inclusive Prepaids Adjustment       0.00         Net Adjustment       0.00       Allocation [incomplete       0.00         Contract Line Pricing       Current Mannaha       Adjustment       Adjustment       Adjustment       Reverse Retroactively       Discount/Surcharge       New Net Stilling Pricing       First 1 of 1 • Last         Retrieve Billing Price       Line       Poduct       Soudo		Fixed E	Billing Adjustment		0.00	Una	llocated Fixed Billi	ng	0.00	)		
Net Adjustment     0.00     Allocation [incomplete     Recallulate       Contract Line Pricing     Contract Line Pricing     First 1 of 1 • Last       Amounts     Detail     Contract Line Pricing     First 1 of 1 • Last       Retrieve     Line     Poduct     Contract Line Pricing     New Billing Amount     Adjustment     Adjust Revenue     Reverse     Discount/Surcharge     New Net Stilling Pricing     Intel Billing		Dis	count / Surcharge		0.00	Inclusive	Prepaids Adjustme	nt	0.00	1		
Contract Line Pricing ()         Personalize   Find   ()         First ()         1 of 1 ()         Last           Amounts         Detail         Current         Adjustment         Adjustment         Adjustment         Adjustment         New Retroactively         Reverse         Discount/Surcharge         New Net         Simulate Billing Pricing         I         Adjustment         Adjustment         Adjustment         Reverse         Discount/Surcharge         New Net         Simulate Billing Pricing         I         I         Adjustment         Insulate Billing Pricing         I         I         Adjustment         Insulate Billing Pricing         I         Insulate Billing Pricing         Insulate Billing         Insulate Billing         <			Net Adjustment		0.00		Allocati	n Incomplete	~	R	ecalculate	]
Amounts         Detail           Retrove         Line Billing Price         Poduct         Current Billing Amount         Adjustment Billing Amount         Adjust Reveney Billing Amount         Adjust Reveney Retroactively         Revene Amounts         Discound/Surcharge Adjustment         New Net Billing Amount         Billing Billing Amount         Adjust Reveney Billing Amount         Discound/Surcharge Adjustment         New Net Billing Amount         Simulate Billing Pricing         Adjustment           Image: Select All         Image: Clear All <td>Contract L</td> <td>ine Pricing</td> <td>2</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Persona</td> <td>ize   Find   🖟</td> <td>기 🔣 First 🕙 1 of 1 🕑 Last</td>	Contract L	ine Pricing	2							Persona	ize   Find   🖟	기 🔣 First 🕙 1 of 1 🕑 Last
Retrieve Image Product Current Mannon Adjustment Mannon Adjust Revenue Retroactively Reverse Mannon Discount/Surcharge New Milling Pricing Sinulate Billing Pricing	Amounts	Detail										
1       AMT_PROJE81       50,000.00       50,000.00       Image: Constraint of the second	Retrieve Billing Price	Line Number Pi	roduct	Current Billing Amount	New Billing Amount	Adjustment Billing Amount	Adjust Billing Retroactively	Adjust Revenue Retroactively	Reverse Amounts	Discount/Surcha Adjustn	nge New Meent Billi	let ng Simulate Billing Pricing
Select All Clear All     Adjustment Line Totals     Billing Amount   0.00		1 A	MT_PROJE81	50,000.00	50,000.00						0.00 50,000	00 Simulate Billing Pricing
Adjustment Line Totals ②         Billing Amount       0.00         Discounts/Surcharges       0.00         Billing Limit       0.00         Prepaids         Return to General Information         Image: A control Search         Image: A cont	Select All		Clear All							R	ecalculate	]
Billing Amount     0.00     Recurring Billing     0.00       Discounts/Surcharges     0.00     Billing Limit     0.00     Total Billing     0.00	Adjustmen	nt Line Total	s (?)									
Discounts/Surcharges 0.00 Billing Limit 0.00 Total Billing 0.00 Prepaids Return to General Information           Return to Search         Image: Control of Control o			Billing Amount	0.	00	Recurring	Billing	0.00				
Prepaids Return to General Information		Discou	nts/Surcharges	0.	00	Billing	g Limit	0.00	Total	Billing	0.00	
Return to General Information	Prepaids											
Rave R Return to Search 🖸 Notify	Return to Gen	eral Informatio	n									
	🔚 Save 【	🖈 Return to S	Search 🔄 Notify									

10. Click in the **Total Billing Adjustment** field. To increase the contract amount you would add a positive number and to decrease the contract amount, you would enter a negative number. For this scenario, we will increase the amount by \$40,000.

## **Project Accounting Job Aid**



### PA354_Amending Non-Federal Customer Contracts (VDOT)

**Note**: If decreasing the contract amount, you cannot decrease the amount less than the amount that has already been billed.

If it is necessary to decrease the contract amount to an amount less than the amount that has already billed, it is recommended that you submit a Help Desk ticket (vccc@vita.virginia.gov) with **Cardinal Project Accounting** (PA) in the subject line. The Cardinal Post Production Support (PPS) PA team will work with you to ensure the transaction is processed correctly.

Favorites  Main Menu  Customer Contracts  Create and Amend  General Information  Amendment Amount Allocation										
Amendment Billing Allocation						New Window   Help   Personalize Page   📰				
Contract 0000001990										
Business Unit 50100 Amendment 0000000001										
Sold To 0000000120 0	CENTRAL VA COMMUNITY COL	LEGE Ame	ndment Type Contra	ct Line						
Currency USD		Amend	ment Reason Modify	Contract Line						
Contract Billing (2)										
Total Billing Adjustment	40,000.00	Unallo	cated Billing	0.00						
Total Billing After Adjustment	90,000.00									
	•									
	40,000,00									
Fixed Billing Adjustment	40,000.00	Unallocated Fixed Bi	ling	0.00						
Discount / Surcharge	0.00	inclusive Prepaids Adjustr	nent	0.00						
Net Adjustment	40,000.00	Alloca	tion Complete	~	Recalculate	]				
Contract Line Pricing (?)					Personalize   Find	🔄   🔜 First 🕚 1 of 1 🕑 Last				
Amounts Detail										
Retrieve Line Billing Price Number	Current Billing Amount	Adjustment Billing Amount Retroactively	Adjust Revenue Retroactively	Reverse Dis Amounts	count/Surcharge New Adjustment Bi	v Net Simulate Billing Pricing				
1 AMT_PROJE81	50,000.00 90,000.00	40,000.00			0.00 90,00	0.00 Simulate Billing Pricing				
Select All					Recalculate					
Adjustment Line Totals 👔										
Billing Amount	40,000.00	Recurring Billing	0.00							
Discounts/Surcharges	0.00	Billing Limit	0.00	Total Billing	40,000.00					
Prepaids										
Return to Search										

- 11. Any time you modify a contract amount for an amount-based contract line, you must allocate the adjustment amount across your amount-based contract lines using the **Amendment Billing Allocation** tab.
- 12. In the **Contract Billing** section, enter the total adjustment amount (positive or negative) in the **Total Billing Adjustment** field. For this scenario **40,000.00**.
- 13. In the **Fixed Billing** section, enter the total adjustment amount (positive or negative) in the **Fixed Billing Adjustment** field.
- 14. Update the **New Billing Amount** to reflect the amended total billing for the line (total amount of the adjustment + **Current Billing Amount**. For this scenario 50,000 + 40,000 = 90,000.



- 15. Verify that the **Adjust Billing Retroactively** and **Adjust Revenue Retroactively** check boxes are both unchecked.
- 16. Click the **Recalculate** button.

Favorites -	Main	Menu 🗸 🔹 > Custo	mer Contracts $\checkmark$ $\rightarrow$	Create and A	mend 🗸 > G	eneral Information	> Amendment A	mount Allocation				
Amendmen	t Billing All	ocation								New Windo	ow   Help   Personalize Page	ī
	Contr	act 0000001990										
	Business (	Unit 50100				Ar	mendment 000000	0001				
	Sold	ITo 000000120	CENTRAL VA CO	MMUNITY COL	LEGE	Amendr	ment Type Contrac	t Line				
	Curren	icy USD				Amendme	nt Reason Modify	Contract Line				
Contract I	Billing 🕐											
	Tot	tal Billing Adjustment		40,000.00		Unallocat	ed Billing		0.00			
	Total Bil	ling After Adjustment	g	0,000.00								
Fixed Billi	ng 🕐											
	Fixe	ed Billing Adjustment		40,000.00	Unal	llocated Fixed Billin	g	0.00				
		Discount / Surcharge		0.00	Inclusive	Prepaids Adjustmer	nt	0.00				
		Net Adjustment	4	0,000.00		Allocatio	n Complete	~	Deselo	1=4-		
									Recaicu	late		
Contract I Amounts	Line Pricin	ig (?)							Personalize	Find   🖾   🚟	First 🖤 1 of 1 🖤 Last	(
Patriava	Line		Current	New Billing	Adjustment	Adjust Billing	Adjust Devenue	Deverse	Discount/Surcharge	New Net		
Billing Price	Number	Product	Billing Amount	Amount	Billing Amount	Retroactively	Retroactively	Amounts	Adjustment	Billing	ate Billing Pricing	
	1	AMT_PROJE81	50,000.00	90,000.00	40,000.00				0.00	90,000.00 Simul	ate Billing Pricing	
Select All		Clear All							Recalcu	late		
Adjustme	nt Line To	tals 🥐										
		Billing Amount	40,000.0	00	Recurring I	Billing	0.00					
	Disc	ounts/Surcharges	0.0	00	Billing	ı Limit	0.00	Total Billin	ng 40,0	00.00		
Prepaids												
Save	Return t	to Search										
Un cave	Neturni	Notity										

- 17. The Allocation status should change to Allocation Complete.
- 18. The Adjust Billing Retroactively and Adjust Revenue Retroactively check boxes should be unchecked. If they were defaulted to checked, you should uncheck them.
- 19. The Adjustment Amount should equal the amount of your adjustment.
- 20. Click the Save button.
- 21. Click the General Information link in the navigation bar.

**Note**: If you were amending the contract to reduce the amount below what has been billed, the **Adjust Billing Retroactively** and **Adjust Revenue Retroactively** checkboxes must be checked.



Favorites  Main Menu  Customer Contracts	reate and Amend - > General Information	
General Lines Amendments		New Window   Help   Pers
Contract Number 0000001990 Amendment Number 0000000000	Sold To Customer <u>CENTRAL VA COMMUNITY COLLEGE</u> *Contract Status ACTIVE ×	
Amend Contract	Add to My Contracts	
Description Other - Amount Based Contract Admin Region Code Contract Type O Currency Code USD Exchange Rate Type CRRNT Contract Signed 08/13/2019 Contract Role Revenue Profile Use Project ChartFields:	Processing Status Active         Amendment Status Pending         Business Unit VA Dept of Transportation         Contract Classification Standard         Last Update Date/Time 08/21/2019 10:30:18AM         Last Update User ID SHELLY.PRYOR         Separate Fixed Billing and Revenue:         Separate As Incurred Billing and Revenue:	
Other Information		
Summary of Amounts ?		
Billing Plans Revenue Plans Milestones	Renewals Supplemental Data Go To More	~
Return to Amendment Amount Allocation		📑 Add 🖉 Update/Display
General   Lines   Amendments		

#### 22. Click the Amendments tab.

Favorites 🗸	Main N	Menu 🗸	> Customer Co	ontracts $ ightarrow  ightarrow$ Create and A	mend 🗸	> General Info	ormation			
Ge <u>n</u> eral !	_ines An	nendments								
Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE										
Am	Amendment Number 0000000000 Contract Status ACTIVE									
An	Amend Contract									
Amendmen	Amendments Personalize   Find   View All   💷   🌉 First 🕚 1-2 of 2 🕑 Last									
General	General         Statistics         Billing Amended Amounts         Revenue Amended Amounts         Misc.									
Amendment	Amen	idment Type		Reason		Process Date	Amendment Status	Detail	Notes	
000000001	Contr	ract Line		Modify Contract Line		08/21/2019	Pending	Detail	Notes	
0000000000						08/13/2019	Complete	Detail	Notes	
Billing Plans	Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To More V									
Return to Amendment Amount Allocation										
Save C Return to Search										
General   Lines	3eneral   Lines   Amendments									

23. Click the Detail link next to contract line amendment that was just added.



Favorites -	Main Menu 🗸	> Customer Contracts	<ul> <li>Create and Ame</li> </ul>	end 👻 > General In	formation		
Amendm	ent Details						New W
S	Contract old To Customer	0000001990 0000000120		Amendment Numbe	r 000000001		_
ر Am	Amendment Type nendment Reason	Contract Line  V Modify Contract Line  V		*Process Da *Amendment Statu	te <u>118/21/2019</u> Cancelled Is <u>Pending</u> Ready		
Total B Fixed B Fixed	illing Adjustment Illing Adjustment	40,000.00 40,000.00	Tota Fixe	al Revenue Adjustme d Revenue Adjustme ed Revenue Allocatio	nt 40,000.00 nt 40,000.00		
Addition	al Amendment	Details	FIA		in complete		
	Reference ID			User Ref : User Ref :	#1		
Amendmen	t Components				Personalize   Find   View All	🖾   🔣 🛛 First 🕚 1-2 of 2 🕑 Last	
General	Statistics						
Componen	nt	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value	
1 Amount Al	llocation	Line 1	Billing Amount	Update	50000	90000	
2 Amount Al	llocation	Line 1	Revenue Amount	Update	50000	90000	
Amendment Ar Return to Gene	mount Allocation eral Information	E Notify	Internal Notes				_

- 24. Confirm Amendment Components.
- 25. Click the Amend Status drop-down menu.
- 26. Select the **Ready** option.

Favorites - Main Menu -	> Customer Contracts	<ul> <li>Create and Arr</li> </ul>	iend 👻 > General Info	ormation			
, i i i i i i i i i i i i i i i i i i i							New Window
Amendment Details							
Contract	000001000		Amendment Number	000000001			
Cald Ta Custaman	0000001330			00000001			
Solu To Custollier	000000120						-
Amendment Type	Contract Line		Process Date	08/21/2019			
Amendment Reason	Modify Contract Line		*Amendment Status	Ready V		Process Amendment	
Total Billing Adjustment	40,000.00	То	tal Revenue Adjustmen	t 40,000.00			
Fixed Billing Adjustment	40,000.00	Fix	ed Revenue Adjustmen	t 40,000.00			
Fixed Billing Allocation	Complete	Fi	xed Revenue Allocation	Complete			
Additional Amendment	Details						
Reference ID	)		User Ref #	1			
			User Ref #	2			
Amendment Components				Personalize   Find   Vie	ew All   💷   🔣	First 🕚 1-2 of 2 🕑 Last	
General Statistics							
Component	Amend Ref #1	Label Fieldname	Edit Type C	01d Value	New Value		
1 Amount Allocation	Line 1	Billing Amount	Update 5	0000	90000		
2 Amount Allocation	Line 1	Revenue Amount	Update 5	0000	90000		
Debug is Occurrent laferer		Internal Notes					
Return to General Information							
Save Return to Search	Notify						

27. The Process Amendment button displays.



#### 28. Click the Process Amendment button.

Favorites - Main M	enu 🗸 💦 🗧	Customer Contrac	ts 🗸 > Create and Ame	end 👻 > General Info	ormation					
Amendment Deta	ails									
Con	tract 0000	001990		Amendment Number	000000001					
Sold To Cust	tomer 0000	000120	Amen	Amendment Completed On 08/21/2019 10:55AM						
Amendmen	t Type Cont	ract Line		Process Date	08/21/2019					
Amendment R	eason Modi	fy Contract Line		Amendment Status	Complete					
Total Billing Adjus	Total Billing Adjustment 40,000.00 Total Revenue Adjustment 40,000.00									
Fixed Billing Adjus	stment 40,0	00.00	Fixe	d Revenue Adjustment	t 40,000.00					
Fixed Billing Allo	cation Com	plete	Fix	ed Revenue Allocation	Complete					
Additional Amend	ment Detai	ls								
Defen				U						
Retere	ince ID			User Ref #	1					
				User Ref #2	2					
Amendment Compon	ents				Personalize   Find   View Al	🗗   🔜 🛛 First 🕢 1-2 of 2 🕑 Last				
General Statistics										
Component	A	mend Ref #1	Label Fieldname	Edit Type C	01d Value	New Value				
1 Amount Allocation	L	ine 1	Billing Amount	Update 5	0000	90000				
2 Amount Allocation	L	ine 1	Revenue Amount	Update 5	50000 90000					
			Internal Notes							
Return to General Informat	tion									
Save Return to	Save 🔯 Return to Search 📰 Notify									

29. The **Amend Status** updates to **Complete**. The amended amount has been successfully processed.

Fixed Revenue Allocation Complete	
Message	]
Warning The bill plan is on hold since the event total does not equal the negotiated amount.	
Either adjust the amount or the percentage on the event to correct the problem and then deselect the Hold flag before processing.	
OK Billing Amount Update 50000 90000	

- 30. A message box displays indicating that the bill plan is on hold since the event total does not equal the negotiated amount.
- 31. Click the **OK** button.
- 32. Click the Return to General Information link.



Favorites 🗸	Main Menu	→ Customer Co	ontracts $ earrow  ightarrow  ig$	nd 👻	> General Infor	mation				
Ge <u>n</u> eral Line	es Amendi	ments								
Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE										
Amen	dment Numbe	er 0000000001	C	ontrac	t Status ACTIVE					
Amen	nd Contract									
Amendments				P	ersonalize   Find	View All	📑 First	🕚 1-2 of 2 🕑 La	ast	
General Statistics Billing Amended Amounts Revenue Amended Amounts Misc.										
Amendment	Amendmen	nt Type	Reason		Process Date	Amendment Status	Detail	Notes		
000000001	Contract Li	ine	Modify Contract Line		08/21/2019	Complete	Detail	Notes		
0000000000					08/13/2019	Complete	Detail	Notes		
Billing Plans	Rever	nue Plans M	ilestones Renewals			Su	pplemental Da	ata Go To	More 🗸	
Return to Amendment Amount Allocation										
Save Return to Search										
General   Lines   /	General   Lines   Amendments									

#### 33. Click the Lines tab.

Favorites -	,	Main	Menu - Custom	er Contracts 🗸 > Crea	ate and Amen	d ▾ → General Ir	nformation				
										Ne	w Window   Help   Persor
Ge <u>n</u> eral	Line	s    A	Am <u>e</u> ndments								
	Со	ntract	Number 0000001990		Sold	To Customer CEN	NTRAL VA COMM	UNITY COLLEGE			
	Amend	lment	Number 0000000001		Co	ontract Status ACT	ΠVE				
	Amen	d Cont	tract								
Contract	Lines	• ?						Personal	ize   Find   View All   🖟	🛛   🔜 🛛 Firs	t 🕚 1 of 1 🕑 Last
General	Det	ail	Billing Amount Details	Revenue Amount Details	<u>C</u> ontract	Liability 💷					
Actions	Lii	ne	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
- Action	s		1 AMT_PROJE81	Partic- HMO - CCT - F	Amount	Ready	Action Required	Contract Terms	Distribution	Internal Notes	CENTRAL VA COMMU COLLEGE
						<					>
Billing Plans	8		Revenue Plans	Milestones	Renewals			Supplemental Data	Go To More		~
Return to A	mendr	nent A	mount Allocation								
🔚 Save	🖫 Save 🔯 Return to Search 🖸 Notify										
General   Lir	nes   Ar	nendr	nents								

- 34. Click the **Detail** tab under the **Contract Lines** section of the page.
- 35. Click the **Ready** or **Action Required** link under the **Billing Plan** column.

**Note**: Sometimes the **Billing Plan** status will be **Ready** and sometimes it will be **Action Required** as this is a system issue. The **Billing Plan** and **Revenue Plan** should <u>ALWAYS</u> be reviewed regardless of the status that displays.



Favorites   Main Menu   Customer Contracts   Create and Amend   General Informat	tion > Define Billing Plan
Billing Plan General Events History	New V
Contract 0000001990 BI	Unit 50100
Sold To Customer 000000120 CENTRAL VA COMMUNITY COLLEGE Bi	II To 000000120 CENTRAL VA COMMUNITY COLLEGE
Billing Plan 🚽 B101 🕨 Amount Based - Milestone Curre	ency USD
Description Amount Based - Milestone × *Billing St	atus Ready
Billing Method Milestone	✓ Hold 08/21/2019
Customer Information	Hold Details
BI Unit 50100 VA Dept of Transportation	Put On Hold Date 08/21/2019
*Bill To Customer 0000000120 Q CENTRAL VA COMMUNITY COLLEGE	
Addr Num 1 Q	Amount Detail
Bill To Contact	Billing Amount 90,000.00
Billing Options	Total Amount 90,000.00
Bill Type CCT Q IPre Approved	Total Billing History 0.00
Bill Source PROJE Q Direct Invoice	Events Billed To Date 0.00
Summarization Template ID VDOT_OTHER Q VDOT Other	
Billing Header Note Internal Notes Preview Summarization Template	
Billing Default Overrides	
Cycle ID MONTHLY Q View Customer Defaults	
Bill By ID PC_OTHER Q Non-Federal Project	
Payment Method	
Payment Terms Q	
Return to General Information	
Return to Search	📑 Add 🖉 Update/Display
Billing Plan General   Events   History	

____

#### 36. Click the **Events** tab.

Favorites -	Main Menu	Customer Contracts	<ul> <li>Create and Amend</li> </ul>	I 🗸 > General Inf	ormation	> Define Billing	Plan			
Billing Plan	General Events	s History								Ne
	Coni Sold To Custo Billing I	tract 0000001990 omer 0000000120 Plan ∢ B101 ▶	CENTRAL VA COMMUNI Amount Based - Milestone	TY COLLEGE	BI Unit Bill To Currency	50100 0000000120 USD	CENTRAL V	/A COMMUNITY C	OLLEGE	
Define Ev	rents			Amount Detail						
		O Percent Amount Add Milestone			Ren	90,000.00 40,000.00				
Event Det	tail			Personalize   Find   🔄   👪 First 🕢 1-2 of 2 🕑 Last						
Event	Actions	Event Type	*Event Status	Event Date			An	nount		
1	✓ Actions	Date	Ready 🗸	08/13/2019	Event No	ote	50,0	00.00 +. 🗕		
2	- Actions	Date 🗸	Pending V	09/13/2019	Event No	ote		0.00 +		
Return to Ger	neral Information  Return to Sear ieneral   Events   Hi	ch E Notify						📑 Add 🛛 🖉 U	Jpdate/Disp	olay

37. The **Events** tab displays.



Favorites -	<ul> <li>Main Menu</li> </ul>	<ul> <li>Customer Co</li> </ul>	ontracts $ ightarrow$	Create and Amend		ormation	> Define Billing	Plan			
Billing Plan	General Events	History							Ne		
Dining Fian	Concisi Event	<u>Instory</u>									
	Cont	tract 0000001990				BI Unit 50	0100				
	Sold To Custo	mer 0000000120	CEN	TRAL VA COMMUNI	TY COLLEGE	Bill To 0	00000120	CENTRAL VA COMMUNITY	COLLEGE		
	Billing	Plan ┥ B101 🕨	Amo	unt Based - Milestone		Currency U	SD				
Define E	vents				Amount Detail						
		OPercent					Total Amount	90,000.00			
		Amount									
		Add Milestone			0.00						
					L						
Event De	etail				P	First 🕙 1-2 of 2 🕑 Last					
Event	Actions	Event Type	*Ev	ent Status	Event Date			Amount			
1	- Actions	Date	Re	ady 🗸	08/13/2019	Event Note		50,000.00 🐏 🖃			
2	- Actions	Date	✓ Pe	nding 🗸	09/13/2019	Event Note		40,000.00 +			
Return to Ge	eneral Information										
Rave Save	Return to Search Notify Update/Display										
Billing Plan	General   Events   Hi	story									

- 38. In the **Define Events** section, verify **Amount** is selected. If not, select **Amount**.
- 39. In the **Event Detail** section of the page, update events and the **Amount** field for the amount of the contract adjustment.

Note: Be sure the Event number is the same when the Revenue Plan page is updated.

- 40. Update the Event Status to Ready and the Event Date to the date the new Amount should bill.
- 41. Click the **Save** button.
- 42. The Total Amount and Remaining Amount fields update.

**Note**: If the adjustment should be made to existing events that do not have an event status of complete, you do not need to add a new event, just change the event status for the event that needs to be updated from **Ready** to **Pending**. This will open the amount field so the amount can be edited. Once updated, change the event status back to **Ready** and click the **Save** button.

43. Click the **Billing Plan General** tab.



Favorites -	Main Menu -	> Customer Contracts		eneral Informat	ion > Define E	Billing Plan	
							4
Billing Plan (	Seneral Events	History					
	Contract	0000001990		BI	Unit 50100		
	Sold To Customer	000000120	CENTRAL VA COMMUNITY COLLEC	BE BI	II To 0000000120	CENTRAL VA COMMUN	NITY COLLEGE
	Billing Plan		Amount Based - Milestone	Curre	ency USD		
	Description	Amount Based - Milestone	e x	*Billing St	atus Ready	✓ → Actions	
	Billing Method	Milestone	~			Hold 08/21/2019	
Customer I	nformation				Hold Details		
	BI Unit	50100	VA Dept of Transportation			Put On Hold Date 08/21/2	019
	*Bill To Customer	0000000120 🔍	CENTRAL VA COMMUNITY	COLLEGE			
	Addr Num	1 🔍 📰			Amount Detai	1	
	Bill To Contact	Q				Billing Amount	90,000.00
Billing Opti	ons					Total Amount	90,000.00
	Bill Type	CCT	Pre Approved			Total Billing History	0.00
	Bill Source	PROJE	Direct Invoice			Events Billed To Date	0.00
Summa	arization Template ID	VDOT_OTHER	VDOT Other				
Billing Heade	r Note	Internal Notes	Preview Summarization Template				
Billing Defa	ult Overrides						
	Invoice Form	LANDSCAPE					
	Cycle ID	MONTHLY	View Customer Defaults				
	Bill By ID	PC_OTHER Q	Non-Federal Project				
	Payment Method		~				
	Payment Terms	Q					
	Billing Inquiry		Q.				
	Billing Specialist	Q					
Return to Gene	ral Information						
Save C	Return to Search	Notify				Add 🖉	Update/Display
Billing Plan Ger	neral   Events   History						

44. Remove the **Hold** on the **Billing Plan** by unchecking the **Hold** check box.

Note: A Hold Details box displays the Put On Hold Date.

Favorites -	Main Menu 🗸	> Customer Contracts		id Amend 👻 >	General Infor	matio	n > Define B	Billing Plan		
										New
Billing Plan G	eneral <u>Events</u>	History								
	Contract	0000001990				BI Uı	nit 50100			
	Sold To Customer	000000120	CENTRAL VA C	OMMUNITY CO	LLEGE	Bill	To 0000000120	CENTRAL VA COI	MMUNITY COLLEGE	
	Billing Plan		Amount Based -	Milestone	C	urren	cy USD			
	Description	Amount Based - Mileston	e		*Billing	Stat	us Ready	~		
	Billing Method	Milestone	$\sim$					Hold		
Customer In	formation						Amount Deta	11		
	BI Unit	50100	VA De	pt of Transportat	ion			Billing Amount	90,000.00	J
	*Bill To Customer	000000120	CENTR	RAL VA COMMU	JNITY COLLEG	E		Total Amount	90.000.00	5
	Addr Num	1Q 🖙						Total Billing History	0.00	,
	Bill To Contact	Q.						Events Billed To Date	0.00	
Billing Optio	ons							Events Billed To Bute	0.00	·
	Bill Type	CCT Q	✓ Pre	Approved						
	Bill Source	PROJE Q	🗌 Dire	ct Invoice						
Summa	rization Template ID	VDOT_OTHER Q	VDOT	Other						
Billing Header	Note	Internal Notes	Preview Summar	rization Template	Э					
Billing Defa	ult Overrides									
	Invoice Form	LANDSCAPE Q								
	Cycle ID	MONTHLY	View Cu	ustomer Defaults	\$					
	Bill By ID	PC_OTHER Q	Non-Fe	ederal Project						
	Payment Method		~							
	Payment Terms	Q								
	Billing Inquiry		Q							
	Billing Specialist	Q								
Return to Gene	ral Information									
🔚 Save 🔯	Return to Search	Notify						Add	Dpdate/Display	
Billing Plan Gen	eral   Events   History									

- 45. The Hold is removed and the Hold Details box no longer displays.
- 46. Click the **Return to General Information** link at the bottom of the page.



Favorites -	Ma	n Menu 👻 > Custom	er Contracts 👻 > Cre	ate and Amend		nformation					
									Ner	w Window   Help   Persona	
Ge <u>n</u> eral	Lines	Amendments									
	Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE										
A	Amendment Number 000000001 Contract Status ACTIVE										
	Amend Contract										
Contract	Lines 👔						Personaliz	ze   Find   View All   🖓	🛛   🔣 🛛 First	t 🕚 1 of 1 🕑 Last	
<u>G</u> eneral	Detail	Billing Amount Details	Revenue Amount Details	<u>C</u> ontract Li	iability 💷						
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name	
- Actions	s	1 AMT_PROJE81	Partic- HMO - CCT - F	Amount	Ready	Action Required	Contract Terms	Distribution	Internal Notes	CENTRAL VA COMMU COLLEGE	
					<					>	
Billing Plans	;	Revenue Plans	Milestones	Renewals		;	Supplemental Data	Go To More		~	
Return to A	mendment	Amount Allocation									
General   Lin	Return es   Ameno	n to Search 🐨 Notify							Add	Update/Display	

- 47. Click the **Detail** tab.
- 48. Click Action Required in the Revenue Plan field.





The **Revenue Plan** tab displays.

**Note**: The **Revenue Plan** must be adjusted to match change made to the **Billing Plan**. The Revenue events, event dates, event statuses and event amounts should be identical to what is on the Billing Plan Events tab.

Favorites -	Main Menu 🗸	> C	ustomer Contracts	•	> Create and Am	end 🔻	> General In	formation >	Define Revenue P	lan	
Revenue Dian											
Revenue Pl	an										
Itevenue Fi	an										
	Contract	act 0000001990 Business Unit 50100 Currency USD									
	Sold To Customer	00000	00120 CE	NTR	AL VA COMMUNIT	Y COLL	EGE	GL Business U	nit 50100		
	Revenue Plan	e Plan 🔺 R101 🕨 GL Currency USD									
Description Amount Record Milestone											
Description Amount Based - Milestone × *Plan Status Action Required V											→ Actions
Re	Recognition Method Milestone										
									Reviewed		
Define Events	Ву					Amo	unt Detail				
O Percent								90,0	00.00		
Amount     Internal Notes		Preview	v Revenue			Remaining Amount					0.00
Add Milestone											
Event Detail						Pe	rsonalize   Fin	d   View All   🖓	🛛 🔣 🛛 First 🔇	) 1-2 of 2	e 🕑 Last
Event	Event Type		*Event Status		Accounting Date					Amount	
1	Date		Ready		09/12/2010	tti	Event Note			50 000 00	F F
1	Date	~	Ready	~	00/13/2019		Event Note			50,000.00	
2	Date	~	Ready	~	09/13/2019	Ħ	Event Note			40,000.00	+
Return to General	Information										
Save 💽 R	teturn to Search	🔛 No	tify						A	bb	Update/Display

- 49. In the **Define Events By** section, verify **Amount** is selected. If not change click the **Amount** indicator.
- 50. In the **Event Detail** section, add a line if necessary to add an event. Remember, the Event number should match the Bill Plan.
- 51. Enter the **Amount** (for this scenario **40,000**)
- 52. Change the **Event Status Date** to **Ready**.
- 53. Update the **Accounting Date** to match what was entered on the Bill Plan.
- 54. Click the **Save** button.
- 55. After completing all updates, click the **Reviewed button** under the **Plan Status** section.



Favorites -	Main Menu 🗸	> Cu	ustomer Contracts 👻	> Create and Am	nend 👻	> General Infor	mation >	Define Revenue Plan				
Revenue Plan	1											
Revenue F	lan											
	Contract	00000	01990	Business	Unit 50	)100	Currency	USD				
Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE GL Business Unit 50100												
Revenue Plan 🔌 R101 🕨 GL Currency USD												
	Description Amount Based - Milestone											
	Recognition Method Milestone											
Define Even	ts By				Amo	unt Detail						
OPercent					Total Amount 90,000.00							
Amount     Internal Notes	I	Previev	v Revenue		Remaining Amount 0.00							
Add Milestone	1											
Event Detail	l				Pe	rsonalize   Find	View All   🗇	🖩 🐨 First 🕙 1-2	2 of 2 🕑	Last		
Event	Event Type		*Event Status	Accounting Date				Am	ount			
1	Date	~	Ready 🗸	08/13/2019	Ħ	Event Note		50,00	0.00 +	-		
2	Date	~	Ready 🗸	09/13/2019	Ħ	Event Note		40,00	0.00 +	-		
Return to Gene	ral Information Return to Search	🖹 No	tify					Add	ළ Upd	late/Display		

- 56. The Plan Status updates from Action Required to Ready.
- 57. Click the Return to General Information link.

Favorites -	Main Menu 👻 💦	> Customer Co	ntracts 👻 >	Create and Amend -	> General Inform	nation				
Ge <u>n</u> eral <u>L</u> ines	Amendments									
Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE										
Amendment Number 0000000001 Contract Status ACTIVE										
Amend Contract										
Amendments Personalize   Find   View All   🔄   🔣 First 🕚 1-2 of 2 🕑 Last										
General <u>Statis</u>	stics Billing Amer	nded Amounts	Revenue Ame	ended Amounts M	sc.					
Amendment	Amendment Type		Reason		Process Date	Amendment Status	Detail	Notes		
000000001	Contract Line		Modify Contract	Line	08/21/2019	Complete	Detail	Notes		
000000000					08/13/2019	Complete	Detail	Notes		
Billing Plans	Revenue Plan	is Mi	lestones	Renewals		Sup	plemental Dat	a Go To	More 🗸	
Return to Amendme	Return to Amendment Amount Allocation									
Save 🔯 Re	Save Crearch Notify									
General   Lines   Am	endments									

The Contract Amount is updated and complete.