

**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

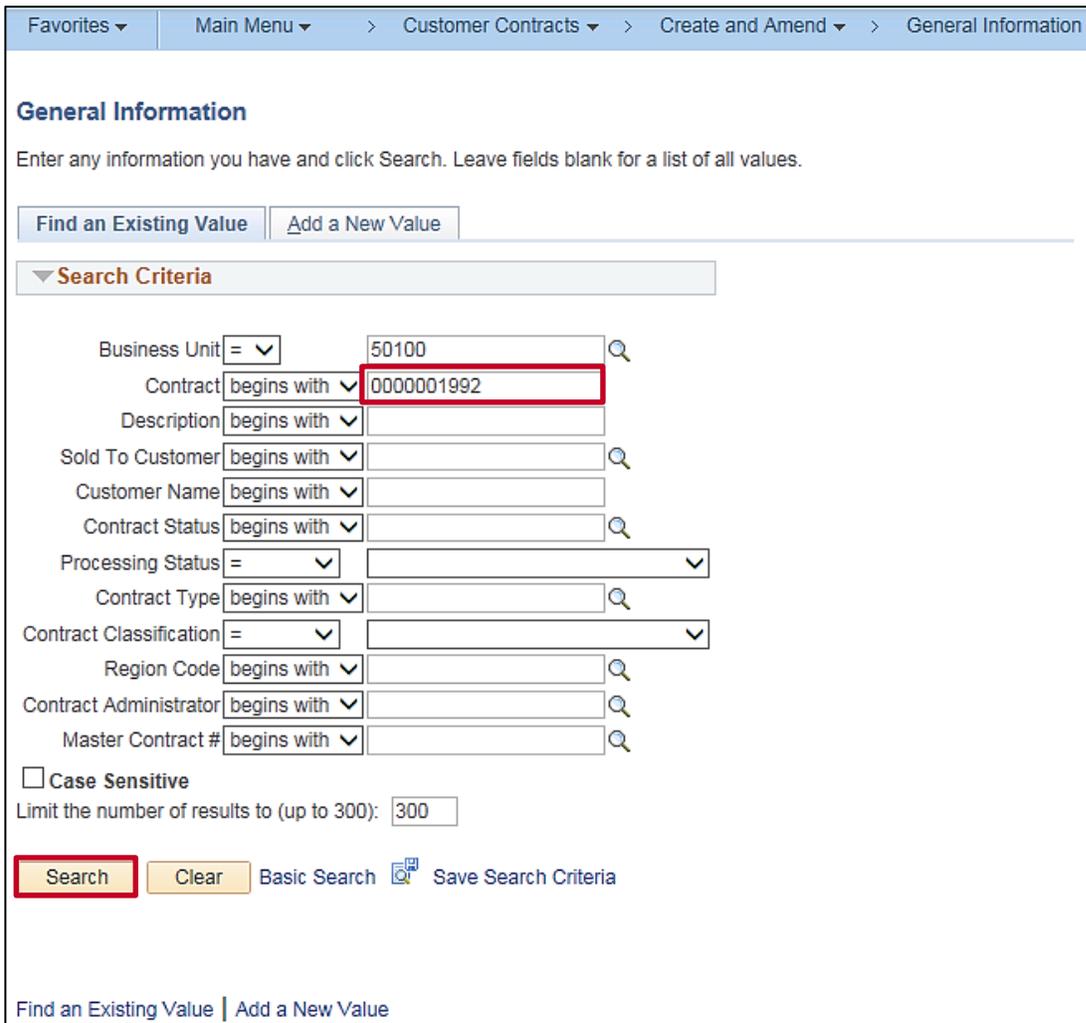
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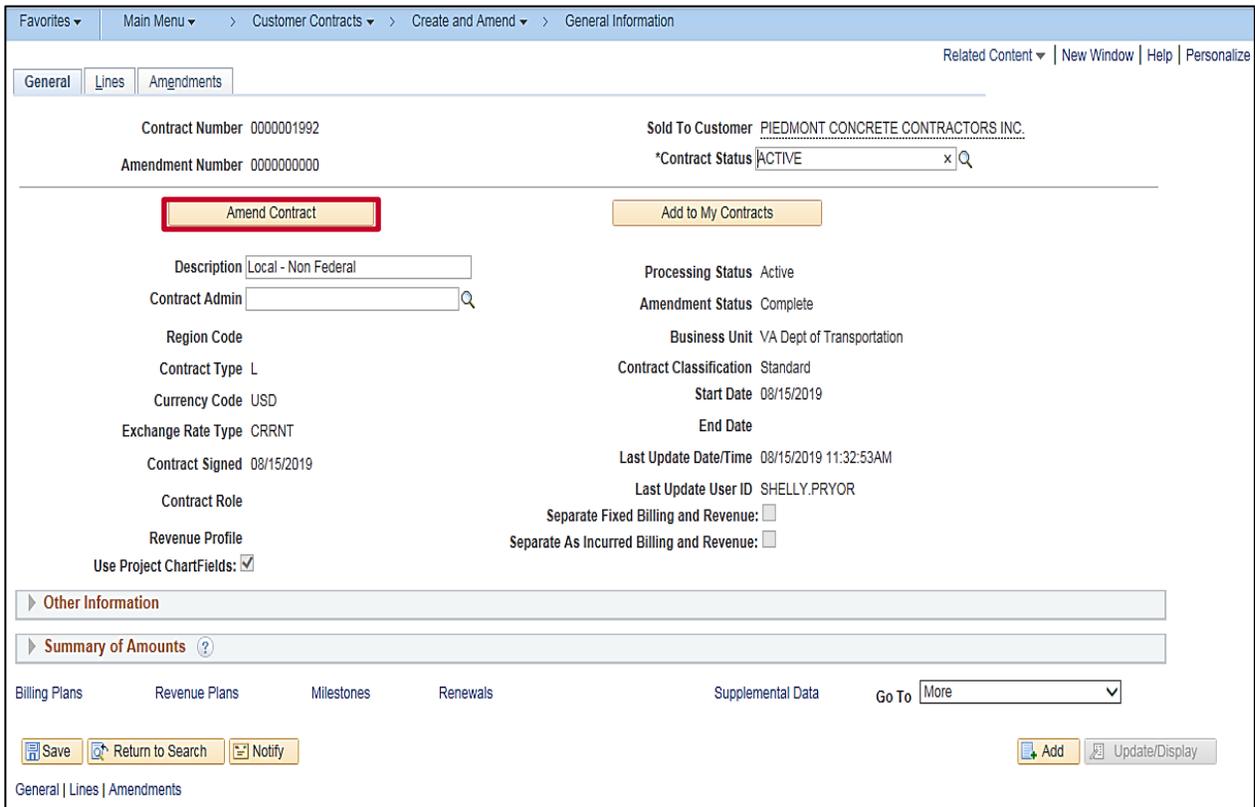
**Amend Contract Header**

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

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



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



The screenshot shows the 'General Information' tab for a contract. The breadcrumb trail is: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information. The page has tabs for 'General', 'Lines', and 'Amendments', with 'General' selected. The contract details are as follows:

Contract Number	000001992	Sold To Customer	PIEDMONT CONCRETE CONTRACTORS INC.
Amendment Number	000000000	*Contract Status	ACTIVE

Buttons: Amend Contract (highlighted with a red box), Add to My Contracts

Fields and values:

Description	Local - Non Federal	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	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		Separate Fixed Billing and Revenue:	<input type="checkbox"/>
Use Project ChartFields:	<input checked="" type="checkbox"/>	Separate As Incurred Billing and Revenue:	<input type="checkbox"/>

Other Information and Summary of Amounts sections are visible but collapsed.

Navigation: Billing Plans, Revenue Plans, Milestones, Renewals, Supplemental Data, Go To: More

Buttons: Save, Return to Search, Notify, Add, Update/Display

6. The **General** tab displays.
7. Click the **Amend Contract** button.

Favorites ▾ | Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information
 Related Content ▾ | New Window | Help | Personalize

General | Lines | **Amendments**

Contract Number 0000001992      Sold To Customer PIEDMONT CONCRETE CONTRACTORS INC.  
 Pending Amendment 0000000001      Contract Status ACTIVE

View Current

**Amendments**      Personalize | Find | View All | |      First | 1-2 of 2 | Last

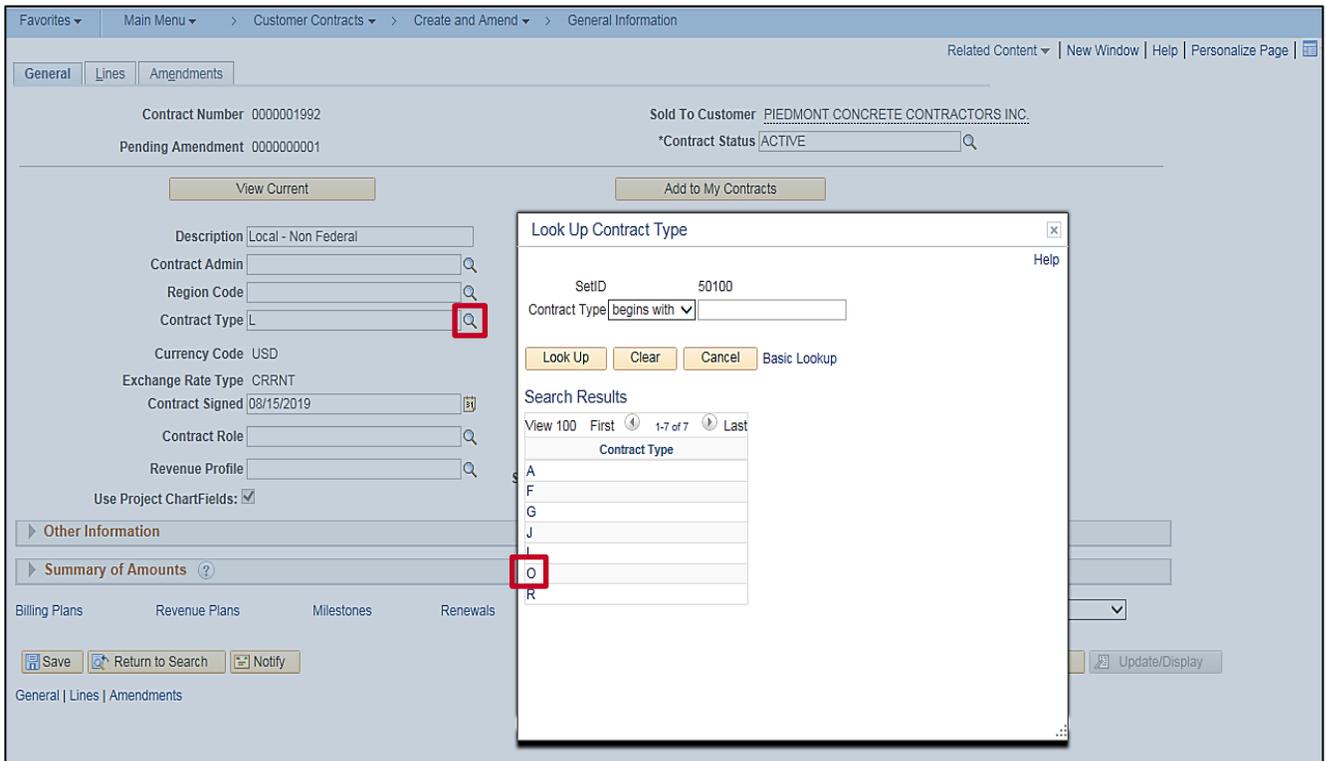
Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000			08/15/2019	Complete	Detail	Notes
0000000001	<b>Contract Header</b>	<b>Amend Header Info</b>	08/20/2019	Pending	Detail	Notes

Billing Plans      Revenue Plans      Milestones      Renewals      Amount Allocation      Supplemental Data      Go To **More** ▾

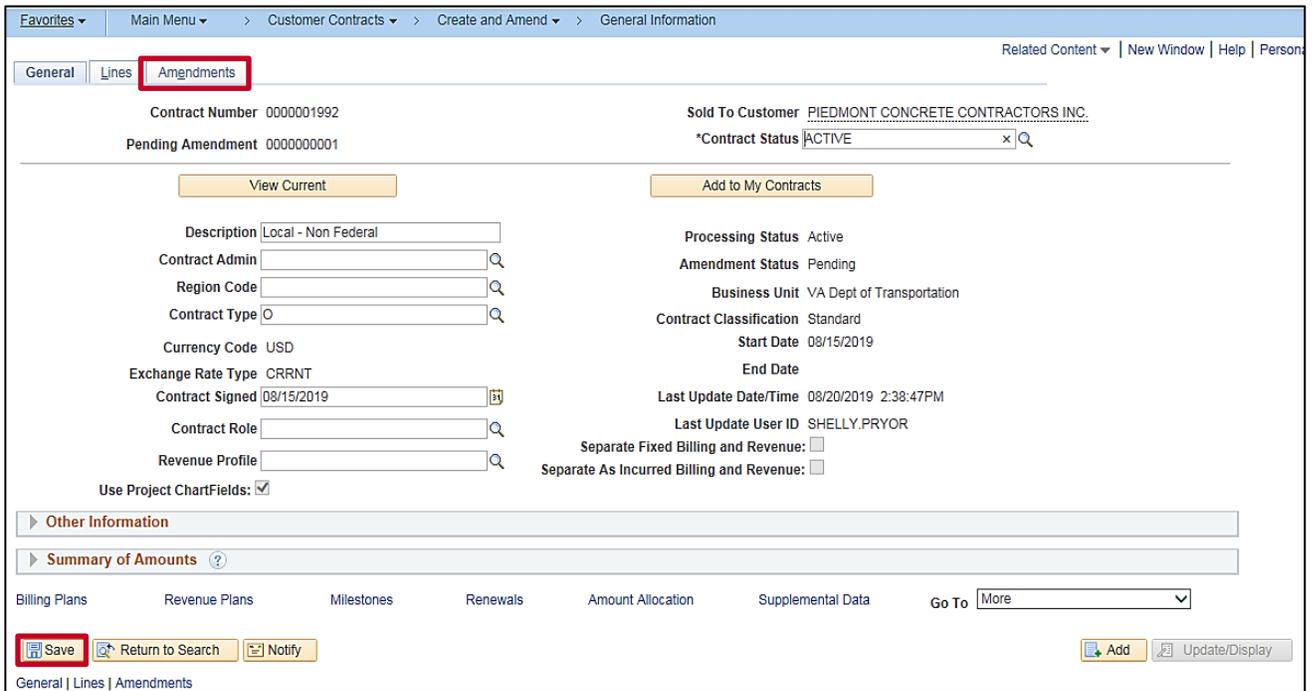
Save    Return to Search    Notify
  Add    Update/Display

General | Lines | Amendments

8. The **Amendments** page displays.  
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.
9. Click the **Amendment Type** drop-down.
10. Select **Contract Header**.
11. Click the **Reason** drop-down menu.
12. Select **Amend Header Info** option.
13. Click the **Save** button.
14. Click the **General** tab.



15. For the scenario, we will change the **Contract Type**.
16. Click the **Contract Type** lookup button.
17. Select the desired option. In this scenario, select **O**.



Contract Number 000001992 Sold To Customer PIEDMONT CONCRETE CONTRACTORS INC.  
 Pending Amendment 000000001 \*Contract Status ACTIVE x|Q

Description Local - Non Federal Processing Status Active  
 Contract Admin [?] Amendment Status Pending  
 Region Code [?] Business Unit VA Dept of Transportation  
 Contract Type O 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 08/20/2019 2:38:47PM  
 Contract Role [?] Last Update User ID SHELLY.PRYOR  
 Revenue Profile [?] Separate Fixed Billing and Revenue:   
 Use Project ChartFields:  Separate As Incurred Billing and Revenue:

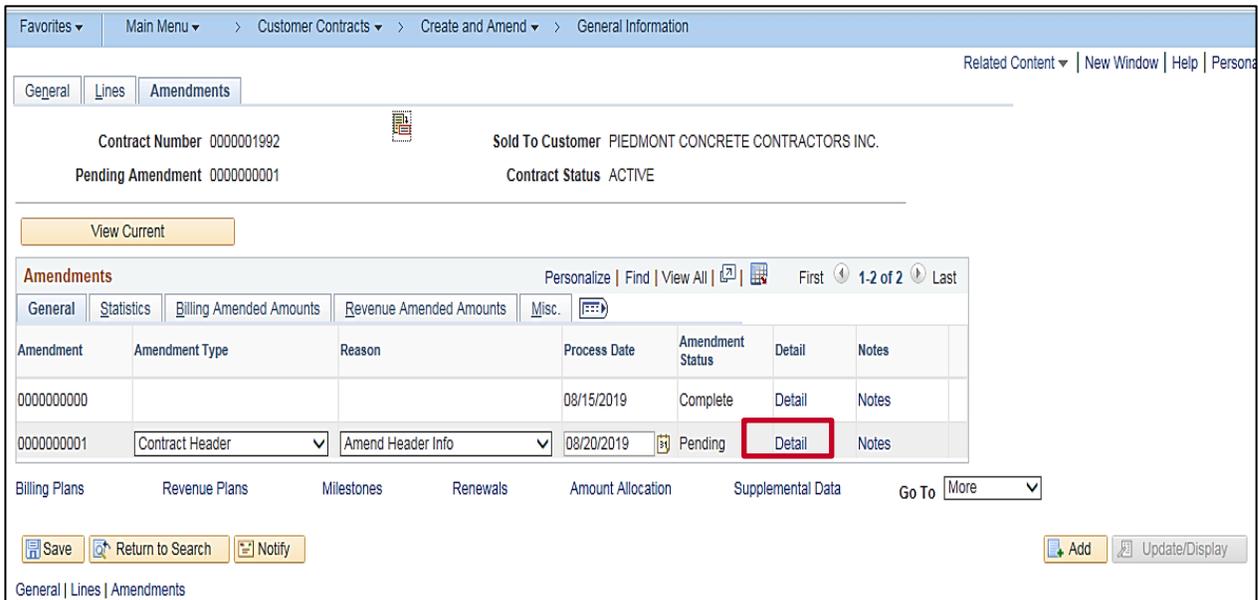
Other Information  
 Summary of Amounts (?)

Billing Plans Revenue Plans Milestones Renewals Amount Allocation Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

18. Click the **Save** button.

19. Click the **Amendments** tab.



Contract Number 000001992 Sold To Customer PIEDMONT CONCRETE CONTRACTORS INC.  
 Pending Amendment 000000001 Contract Status ACTIVE

View Current

**Amendments** Personalize | Find | View All | 1-2 of 2 | First | Last

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
000000000			08/15/2019	Complete	<a href="#">Detail</a>	Notes
000000001	<u>Contract Header</u>	<u>Amend Header Info</u>	08/20/2019	Pending	<a href="#">Detail</a>	Notes

Billing Plans Revenue Plans Milestones Renewals Amount Allocation Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

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

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

### Amendment Details

Contract 0000001992      Amendment Number 0000000001  
 Sold To Customer 0000000001

Amendment Type       \*Process Date 08/20/2019  
 Amendment Reason       \*Amendment Status

Total Billing Adjustment 0.00      Total Revenue Adjustment 0.00  
 Fixed Billing Adjustment 0.00      Fixed Revenue Adjustment 0.00  
 Fixed Billing Allocation Incomplete      Fixed Revenue Allocation Incomplete

▶ **Additional Amendment Details**

Reference ID       User Ref #1   
 User Ref #2

**Amendment Components**      Personalize | Find | View All | First 1 of 1 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contract Header		Type	Update	L	O

Amendment Amount Allocation      Internal Notes  
 Return to General Information

21. Click the **Amend Status** drop-down menu.
22. Select the **Ready** option.

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

### Amendment Details

Contract 0000001992      Amendment Number 0000000001  
 Sold To Customer 0000000001

Amendment Type Contract Header      Process Date 08/20/2019  
 Amendment Reason Amend Header Info      \*Amendment Status      

Total Billing Adjustment 0.00      Total Revenue Adjustment 0.00  
 Fixed Billing Adjustment 0.00      Fixed Revenue Adjustment 0.00  
 Fixed Billing Allocation Incomplete      Fixed Revenue Allocation Incomplete

▶ **Additional Amendment Details**

Reference ID       User Ref #1   
 User Ref #2

**Amendment Components**      Personalize | Find | View All | First 1 of 1 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contract Header		Type	Update	L	O

Return to General Information

23. The **Process Amendment** button displays.
24. Click the **Process Amendment** button.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) New

### Amendment Details

Contract	0000001992	Amendment Number	0000000001
Sold To Customer	0000000001	Amendment Completed On	08/20/2019 2:47PM
Amendment Type	Contract Header	Process Date	08/20/2019
Amendment Reason	Amend Header Info	<b>Amendment Status</b>	<b>Complete</b>

---

Total Billing Adjustment	0.00	Total Revenue Adjustment	0.00
Fixed Billing Adjustment	0.00	Fixed Revenue Adjustment	0.00
Fixed Billing Allocation	Incomplete	Fixed Revenue Allocation	Incomplete

▶ **Additional Amendment Details**

Reference ID	User Ref #1
	User Ref #2

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**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		Type	Update	L	O

Internal Notes

[Return to General Information](#)

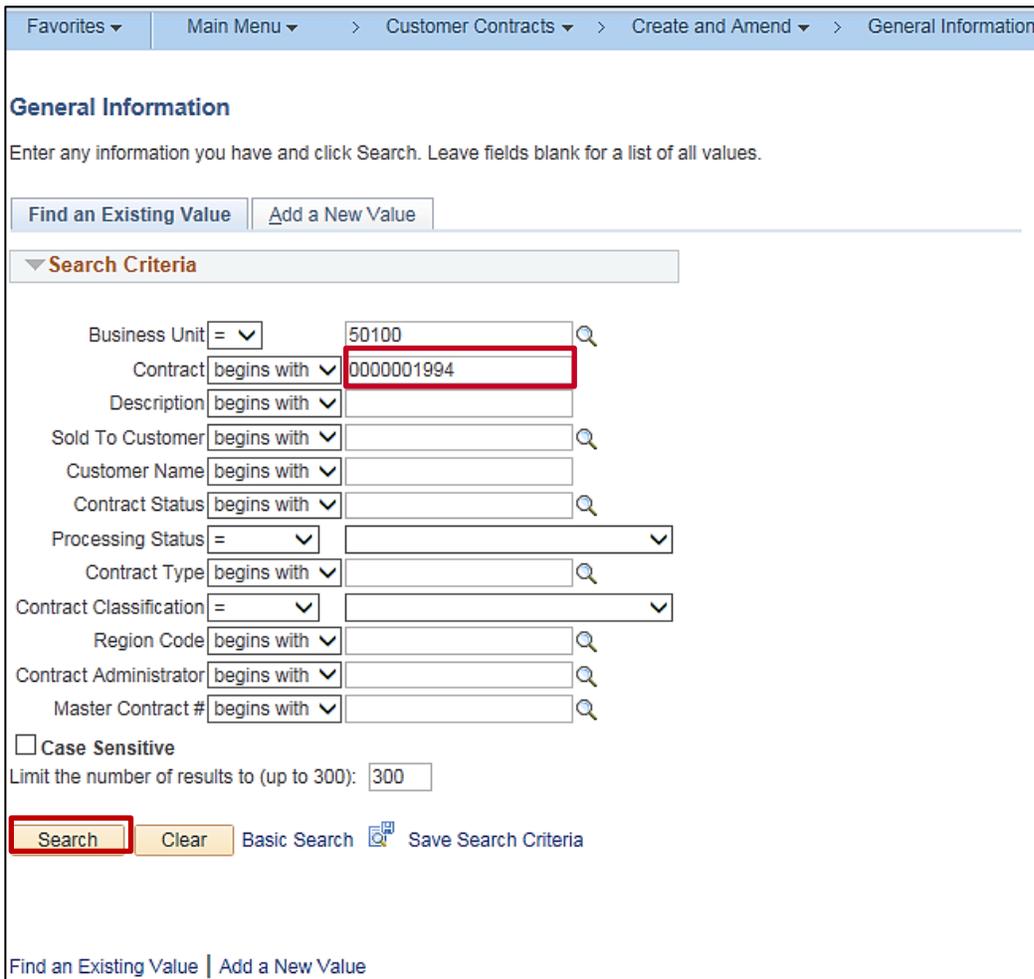
Save 
 Return to Search 
 Notify

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

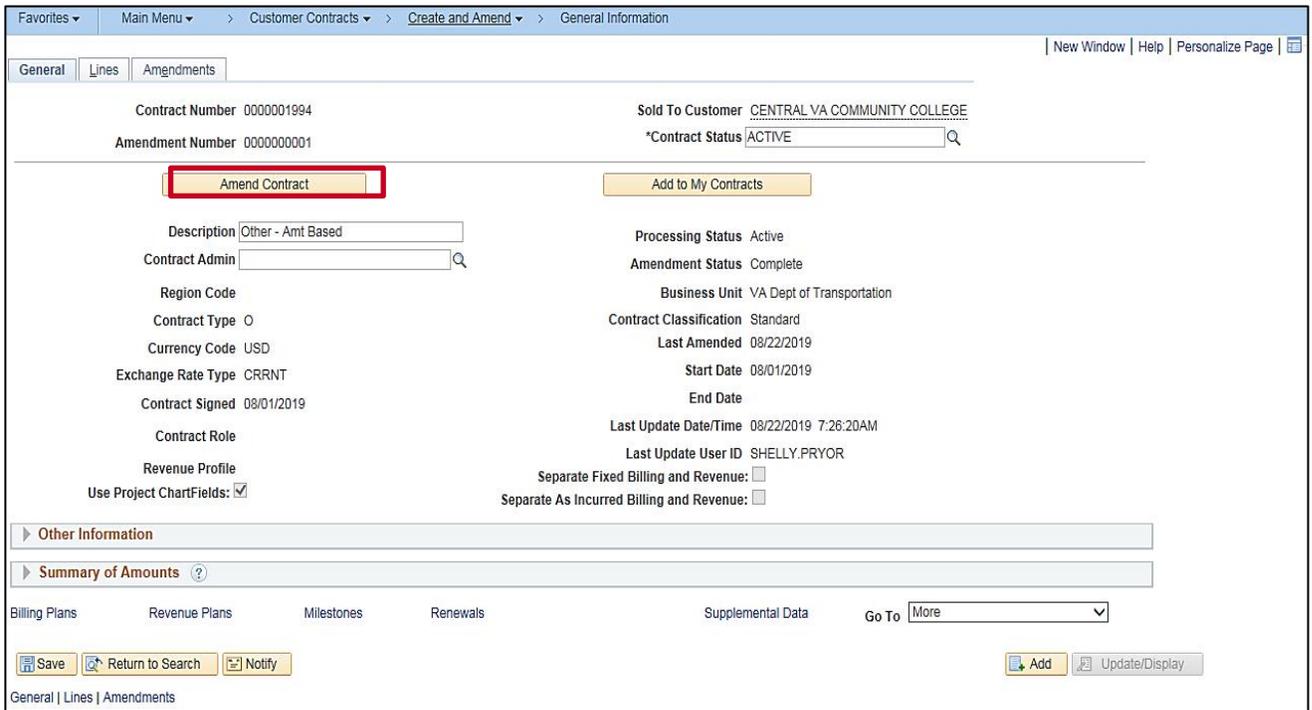
**Amend Contract Terms**

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

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



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



Contract Number 000001994      Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Amendment Number 000000001      \*Contract Status ACTIVE

**Amend Contract**      Add to My Contracts

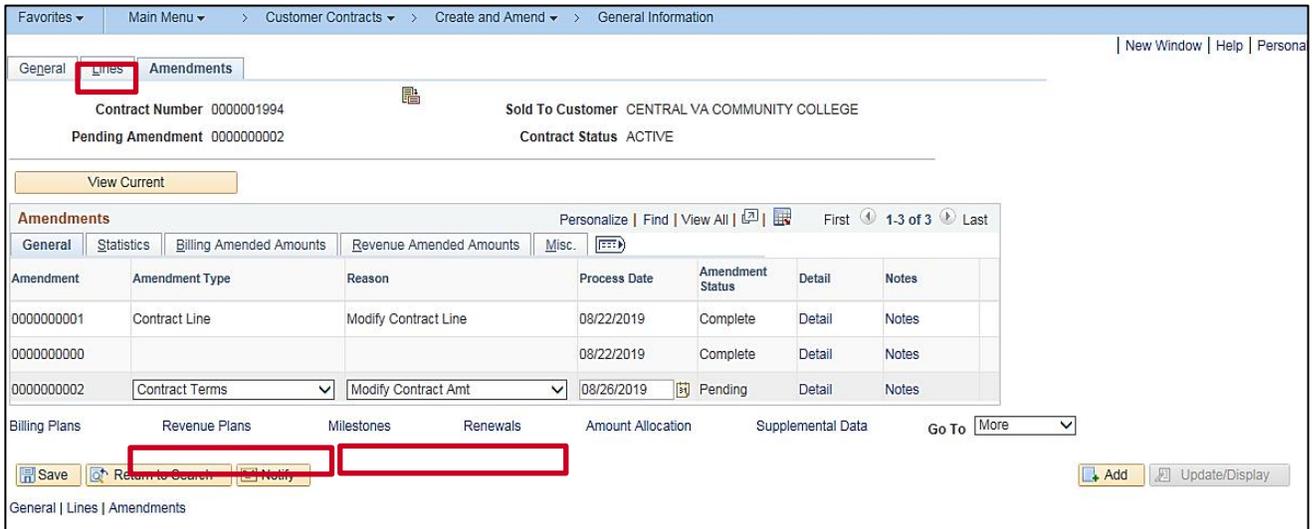
Description Other - Amt Based      Processing Status Active  
 Contract Admin      Amendment Status Complete  
 Region Code      Business Unit VA Dept of Transportation  
 Contract Type O      Contract Classification Standard  
 Currency Code USD      Last Amended 08/22/2019  
 Exchange Rate Type CRRNT      Start Date 08/01/2019  
 Contract Signed 08/01/2019      End Date  
 Contract Role      Last Update Date/Time 08/22/2019 7:26:20AM  
 Revenue Profile      Last Update User ID SHELLY.PRYOR  
 Use Project ChartFields:       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

Save    Return to Search    Notify    Add    Update/Display

4. Click the **Amend Contract** button.



Contract Number 000001994      Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Pending Amendment 000000002      Contract Status ACTIVE

View Current

**Amendments**      Personalize | Find | View All | First 1-3 of 3 Last

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
000000001	Contract Line	Modify Contract Line	08/22/2019	Complete	Detail	Notes
000000000			08/22/2019	Complete	Detail	Notes
000000002	Contract Terms	Modify Contract Amt	08/26/2019	Pending	Detail	Notes

Billing Plans    Revenue Plans    Milestones    Renewals    Amount Allocation    Supplemental Data    Go To More

Save    Return to Search    Notify    Add    Update/Display

5. In the **Amendment Type** field select **Contract Terms**.
6. In the **Reason** field, select **Modify Contract Amt**.
7. Click the **Save** button.
8. Click the **Lines** tab.

## 501 PA354: Amending Non-Federal Customer Contracts

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

General | **Lines** | Amendments

Contract Number 0000001992 Sold To Customer **PIEDMONT CONCRETE CONTRACTORS INC.**  
 Pending Amendment 000000002 Contract Status **ACTIVE**

View Current Add Contract Lines Add Default Kit

**Contract Lines** Personalize | Find | View All | First 1 of 1 Last

General **Detail** Billing Amount Details Revenue Amount Details

Actions	Line	Product	Description	Price Type	Hold Billing on Unpaid Cost	Hold Revenue on Unpaid Cost	Standalone Sale	Bundle	Start Date	End Date	*Sta
▼ Actions	1	MG&SE_CON19_100	Misc - CON - OTH - B	Rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		08/15/2019		Act

Billing Plans Revenue Plans Milestones Renewals Amount Allocation Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

9. Click the **Detail** tab under the **Contract Lines** section of the page.

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

General | Lines | Amendments

Contract Number 0000001994 Sold To Customer **CENTRAL VA COMMUNITY COLLEGE**  
 Amendment Number 000000001 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 Liability**

Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▼ Actions	1	AMT_PROJE1	Partic - HMD - CCT - B	Amount	Ready	Ready	Contract Terms	Distribution	Internal Notes	CENTRAL VA COMMUN COLLEGE

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

10. Click the **Contract Terms** link.



# Project Accounting Job Aid

## 501 PA354: Amending Non-Federal Customer Contracts

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Contract Terms

Related Projects | Contract Amendments

Contract Number 0000001992 Sold To Customer PIEDMONT CONCRETE CONTRACTORS INC.  
Amendment Number 0000000001 Contract Status ACTIVE

Contract Line ◀ 1 ▶ Price Type Rate  
Product MG&SE\_CON19\_100  
Description Misc - CON - OTH - Bristol

**Amend Contract**

PC Business Unit 50100

Billing Limit 5,000.00 Transaction Limits Review Limits  
Revenue Limit 5,000.00 **Perform Limit Checking**

Discount ID Retainage ID  
 Tiered Pricing Tiered Pricing

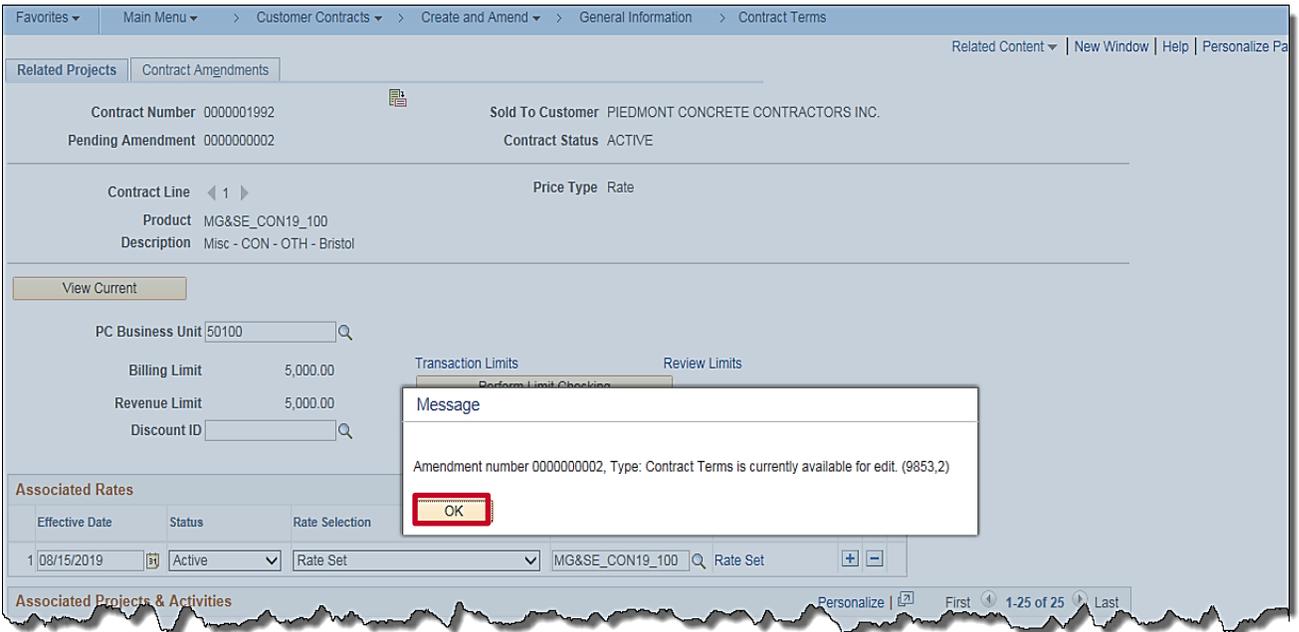
**Associated Rates** Personalize | Find | <sup>[?]</sup> First 1 of 1 Last

Effective Date	Status	Rate Selection	Rate Set
1 08/15/2019	Active	Rate Set	MG&SE_CON19_100 Rate Set

**Associated Projects & Activities** Personalize | <sup>[?]</sup> First 1-25 of 25 Last

*Project	*Activity	Description	Description
0000014603	732	U000134V42,P101,R201,C501,B618	Contract Const Extra
0000014603	733	U000134V42,P101,R201,C501,B618	State Forces Const
0000014603	735	U000134V42,P101,R201,C501,B618	Railroad Construction
0000014603	739	U000134V42,P101,R201,C501,B618	Ineligible FDAA Cost
0000014603	74201	U000134V42,P101,R201,C501,B618	Construction Inspection Field
0000014603	74202	U000134V42,P101,R201,C501,B618	Construction Inspection-Admin
0000014603	74204	U000134V42,P101,R201,C501,B618	Construction Manager/ACE
0000014603	74205	U000134V42,P101,R201,C501,B618	Environmental

11. Click the **Amend Contract** button.



12. A **Message** box displays indicating the **Amendment number** and the **Contract Terms** are available for edit.
13. Click the **OK** button.

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

Related Projects **Contract Amendments**

Contract Number: 0000001531 Sold To Customer: AASHTO  
 Pending Amendment: 0000000003 Contract Status: ACTIVE

Contract Line: 1 Price Type: Rate  
 Product: MG&SE\_MGS30\_100  
 Description: Misc - HMO - OTH - C Office

PC Business Unit: 50100 Transaction Limits Review Limits  
 Billing Limit: **100,000.00**   
 Discount ID: Retainage ID:  
 Tiered Pricing [Tiered Pricing](#)

Associated Rates Customize | Find | 1 of 1 | First | Last

Effective Date	Status	Rate Selection	Rate Set
1 04/01/2011	Active	Rate Set	MG&SE_MGS30_100 Rate Set

Associated Projects & Activities Customize | 1-25 of 56 | First | Last

*Project	*Activity	Description	Description
0000104660	602	AASHTO-Sign Sheeting	PE/Const - Constr on PE Job

[Return to General Information](#)

Amount Allocation

Related Projects | Contract Amendments

14. For this scenario, we will change the **Billing Limit**.
15. Click in the **Billing Limit** field.
16. Change the **Amount** to **100,000.00**.
17. Scroll to the bottom of the page.
18. Click the **Save** button.
19. Click the **Contract Amendments** tab.

[Favorites](#) | [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#)

[Related Projects](#) | **Contract Amendments**

**Contract Number:** 000001531      **Sold To Customer:** AASHTO  
**Pending Amendment:** 000000003      **Contract Status:** ACTIVE

[View Current](#)

**Amendments**      [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-4 of 4](#) | [Last](#)

[General](#) | [Statistics](#) | [Amended Amounts](#) | [Misc.](#)

Amendment	Amendment Type	Reason	*Process Date	Amendment Status	Detail	Notes
0000000003	Contract Terms	Modify Contract Amt	04/30/2015	Pending	<b>Detail</b>	<a href="#">Notes</a>
0000000002	Contract Header	Amend Header Info	04/30/2015	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000001	Prepaid	Amend Prepaid	03/24/2015	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000000			06/19/2013	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>

[Return to General Information](#)

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#)

[Update/Display](#) | [Include History](#) | [Correct History](#)

[Related Projects](#) | [Contract Amendments](#)

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

[Favorites](#) | [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#)

**Amendment Details**

**Contract:** 000001531      **Amendment Number:** 000000003

**Amendment Type:** Contract Terms      **Negotiated Amount:** 0.00      **\*Amend Status:** Pending

**Amendment Reason:** Modify Contract Amt      **Cancelled Negotiated Amount:** 0.00

**\*Process Date:** 04/30/2015      **Discount / Surcharge:** 0.00

**Allocation:** Allocation Not Complete      **Cancelled Discount Amount:**

**Reference ID:**      **User Ref #1:**      **User Ref #2:**

**Amendment Components**      [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

[General](#) | [Statistics](#)

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contractor Terms	Line 1	Funded	Update	23250	100000

[Amendment Amount Allocation](#)      [Internal Notes](#)  
[Return to Contract Terms](#)

[Save](#) | [Return to Search](#) | [Notify](#)

21. Click the **Amend Status** drop-down menu.

22. Select the **Ready** option.

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

### Amendment Details

Contract: 000001531      Amendment Number: 000000003

**Process Amendment**

---

Amendment Type: Contract Terms      Negotiated Amount: 0.00      \*Amend Status: Ready

Amendment Reason: Modify Contract Amt      Cancelled Negotiated Amount:

Process Date: 04/30/2015      Discount / Surcharge: 0.00

Allocation: Allocation Not Complete      Cancelled Discount Amount:

Reference ID:      User Ref #1:      User Ref #2:

Amendment Components

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contractor Terms	Line 1	Funded	Update	23250	100000

[Internal Notes](#)

[Return to Contract Terms](#)

23. The **Process Amendment** button displays.

24. Click the **Process Amendment** button.

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

### Amendment Details

Contract: 000001531      Amendment Number: 000000003      Amendment Completed On: 04/30/2015 12:56PM

Amendment Type: Contract Terms      Negotiated Amount: 0.00      **Amend Status: Complete**

Amendment Reason: Modify Contract Amt      Cancelled Negotiated Amount:

Process Date: 04/30/2015      Discount / Surcharge: 0.00

Allocation: Allocation Not Complete      Cancelled Discount Amount:

Reference ID:      User Ref #1:      User Ref #2:

Amendment Components

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Contractor Terms	Line 1	Funded	Update	23250	100000

[Internal Notes](#)

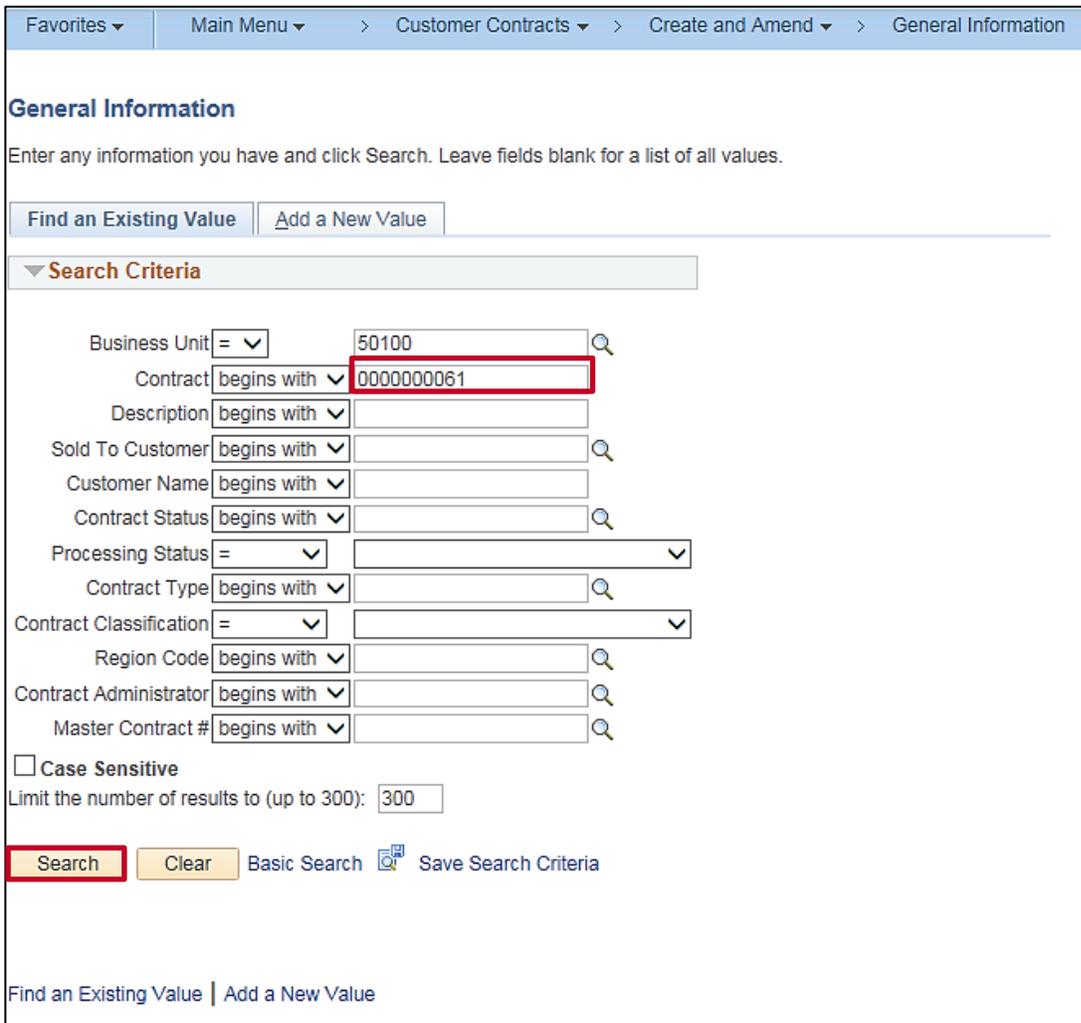
Save    Return to Search    Notify

25. The **Amend 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 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 ▾ **0000000061** 🔍

Description begins with ▾ 🔍

Sold To Customer begins with ▾ 🔍

Customer Name begins with ▾ 🔍

Contract Status begins with ▾ 🔍

Processing Status = ▾ 🔍

Contract Type begins with ▾ 🔍

Contract Classification = ▾ 🔍

Region Code begins with ▾ 🔍

Contract Administrator begins with ▾ 🔍

Master Contract # begins with ▾ 🔍

Case Sensitive

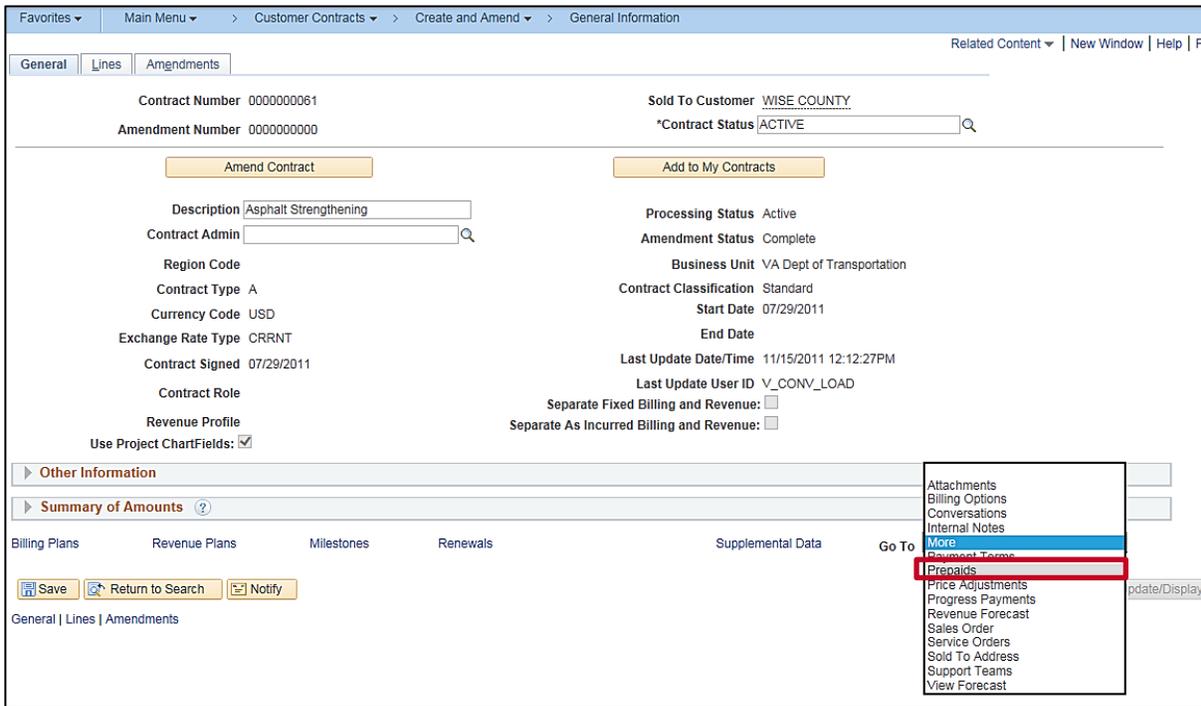
Limit the number of results to (up to 300): 300

**Search** | Clear | Basic Search 🔍 | Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

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

## 501 PA354: Amending Non-Federal Customer Contracts



Contract Number 000000061 Sold To Customer WISE COUNTY  
 Amendment Number 000000000 \*Contract Status ACTIVE

Amend Contract Add to My Contracts

Description Asphalt Strengthening Processing Status Active  
 Contract Admin Contract Admin Amendment Status Complete  
 Region Code Business Unit VA Dept of Transportation  
 Contract Type A Contract Classification Standard  
 Currency Code USD Start Date 07/29/2011  
 Exchange Rate Type CRRNT End Date  
 Contract Signed 07/29/2011 Last Update Date/Time 11/15/2011 12:12:27PM  
 Contract Role Last Update User ID V\_CONV\_LOAD  
 Revenue Profile Separate Fixed Billing and Revenue:   
 Use Project ChartFields:  Separate As Incurred Billing and Revenue:

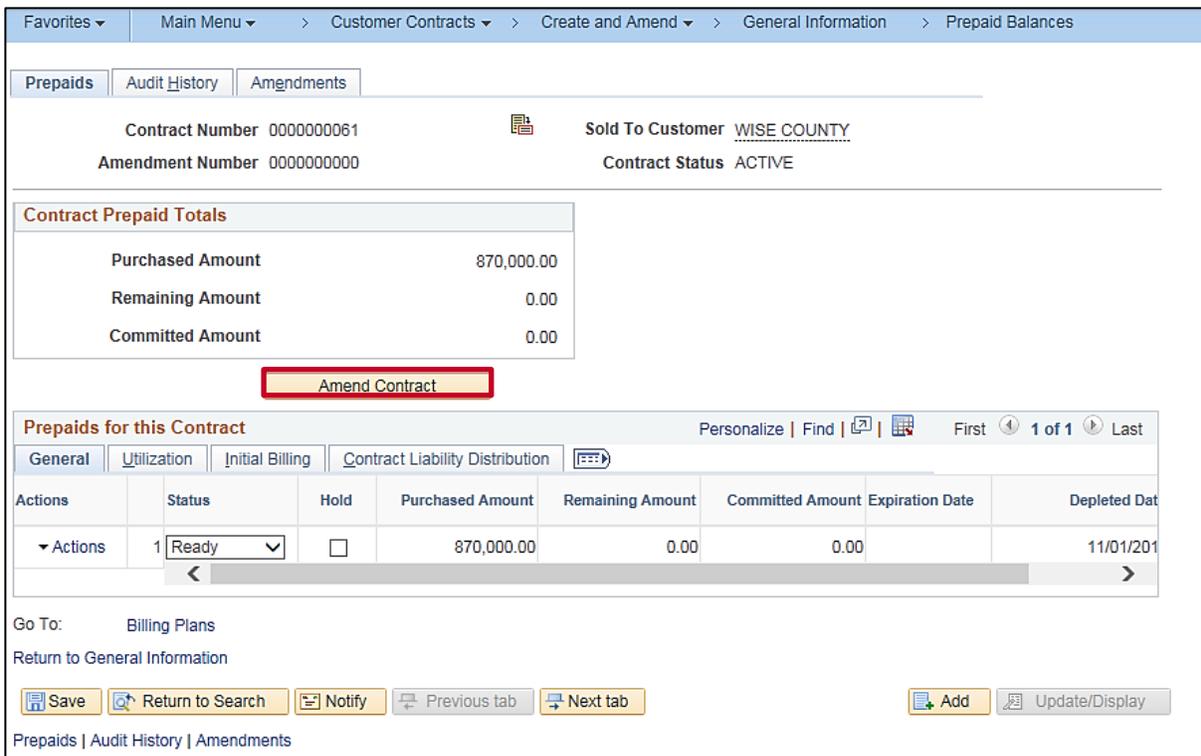
Other Information  
 Summary of Amounts

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To  
 Attachments  
 Billing Options  
 Conversations  
 Internal Notes  
 More  
 Payment Terms  
**Prepays**  
 Price Adjustments  
 Progress Payments  
 Revenue Forecast  
 Sales Order  
 Service Orders  
 Sold To Address  
 Support Teams  
 View Forecast

Save Return to Search Notify

4. Click the **More** drop-down button.

5. Select **Prepays** from the list.



Contract Number 000000061 Sold To Customer WISE COUNTY  
 Amendment Number 000000000 Contract Status ACTIVE

Contract Prepaid Totals

Purchased Amount	870,000.00
Remaining Amount	0.00
Committed Amount	0.00

Amend Contract

Prepays for this Contract Personalize Find 1 of 1 Last

General Utilization Initial Billing Contract Liability Distribution

Actions	Status	Hold	Purchased Amount	Remaining Amount	Committed Amount	Expiration Date	Depleted Dat
▼ Actions	1 Ready	<input type="checkbox"/>	870,000.00	0.00	0.00		11/01/201

Go To: Billing Plans  
 Return to General Information

Save Return to Search Notify Previous tab Next tab Add Update/Display

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

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Prepaid Balances](#)

[Prepays](#) | [Audit History](#) | [Amendments](#)

**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](#) | [Billing Amended Amounts](#) | [Revenue Amended Amounts](#) | [Misc.](#)

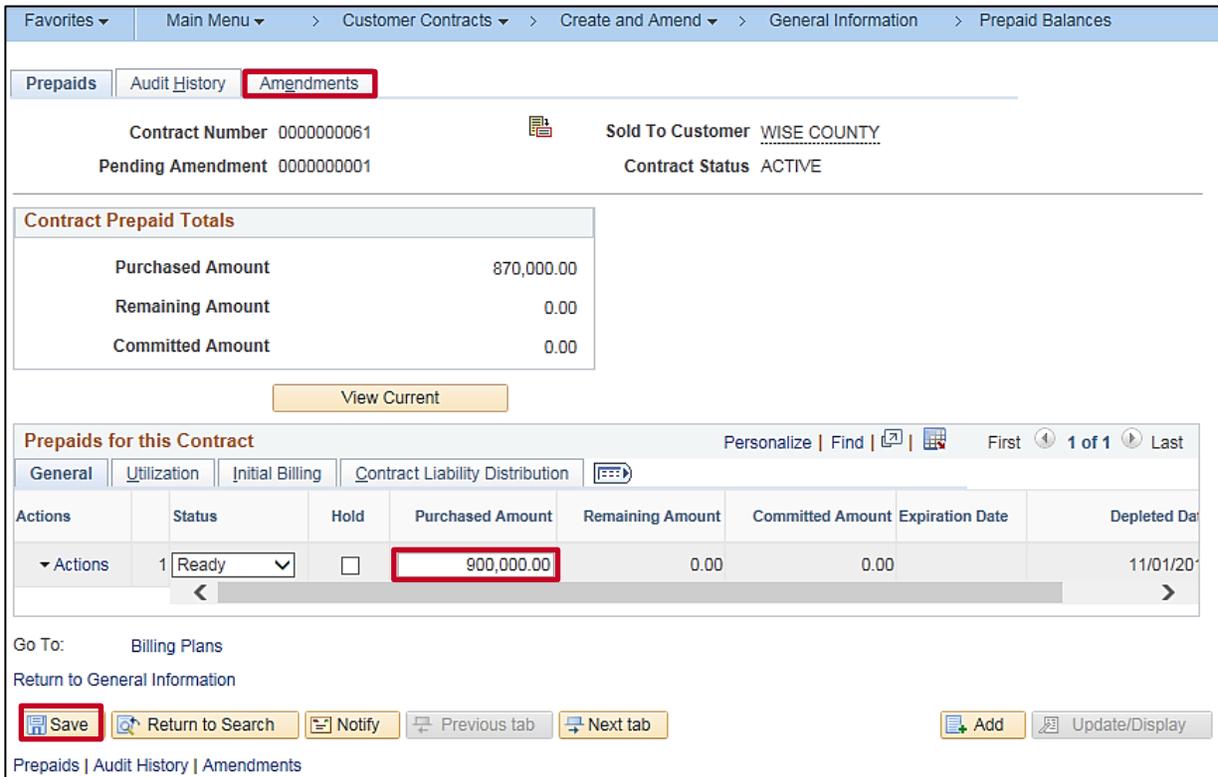
Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000			11/15/2011	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000001	<b>Prepaid</b>	<b>Amend Prepaid</b>	08/21/2019	Pending	<a href="#">Detail</a>	<a href="#">Notes</a>

[Return to General Information](#)

[Save](#) | [Return to Search](#) | [Notify](#) | [Previous tab](#) | [Next tab](#)

[Prepays](#) | [Audit History](#) | [Amendments](#)

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



The screenshot shows a software interface for managing contracts. At the top, there are navigation tabs: Favorites, Main Menu, Customer Contracts, Create and Amend, General Information, and Prepaid Balances. Below this, there are sub-tabs: Prepaids, Audit History, and Amendments (which is highlighted with a red box). The main area displays contract information: Contract Number 0000000061, Pending Amendment 0000000001, Sold To Customer WISE COUNTY, and Contract Status ACTIVE. A section titled 'Contract Prepaid Totals' shows Purchased Amount 870,000.00, Remaining Amount 0.00, and Committed Amount 0.00. Below this is a 'View Current' button. The 'Prepaids for this Contract' section has a table with columns: Actions, Status, Hold, Purchased Amount, Remaining Amount, Committed Amount, Expiration Date, and Depleted Date. The table contains one row with a 'Ready' status and a 'Purchased Amount' of 900,000.00 (highlighted with a red box). At the bottom, there are buttons for Save (highlighted with a red box), Return to Search, Notify, Previous tab, Next tab, Add, and Update/Display. A breadcrumb trail at the bottom reads 'Prepaids | Audit History | Amendments'.

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 **200,000**. If you wanted to decrease the prepaid from **\$870,000** to \$900,000.00, you would enter \$900,000.00 in the **Purchased Amount** field.

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

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Prepaid Balances](#)

[Prepays](#) | [Audit History](#) | [Amendments](#)

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

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000			11/15/2011	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000001	Prepaid	Amend Prepaid	08/21/2019	Pending	<a href="#">Detail</a>	<a href="#">Notes</a>

[Return to General Information](#)  
[Save](#) | [Return to Search](#) | [Notify](#) | [Previous tab](#) | [Next tab](#)

[Prepays](#) | [Audit History](#) | [Amendments](#)

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

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Prepaid Balances](#)

**Amendment Details**

Contract 0000000061      Amendment Number 0000000001  
 Sold To Customer 000003006

Amendment Type       \*Process Date 08/21/2019  
 Amendment Reason       \*Amendment Status

Total Billing Adjustment 0.00      Total Revenue Adjustment 0.00  
 Fixed Billing Adjustment 0.00      Fixed Revenue Adjustment 0.00  
 Fixed Billing Allocation Incomplete      Fixed Revenue Allocation Incomplete

▶ **Additional Amendment Details**

Reference ID       User Ref #1   
 User Ref #2

**Amendment Components**      Personalize | Find | View All | |      First 1 of 1 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Prepays	Prepaid Seq 1	Purchased	Update	870000	900000

Amendment Amount Allocation      Internal Notes  
[Return to Prepaid Balances](#)  
[Save](#) | [Return to Search](#) | [Notify](#)

15. The **Amendment Details** page displays.

16. Click the drop-down menu button for the **Amend Status** field.

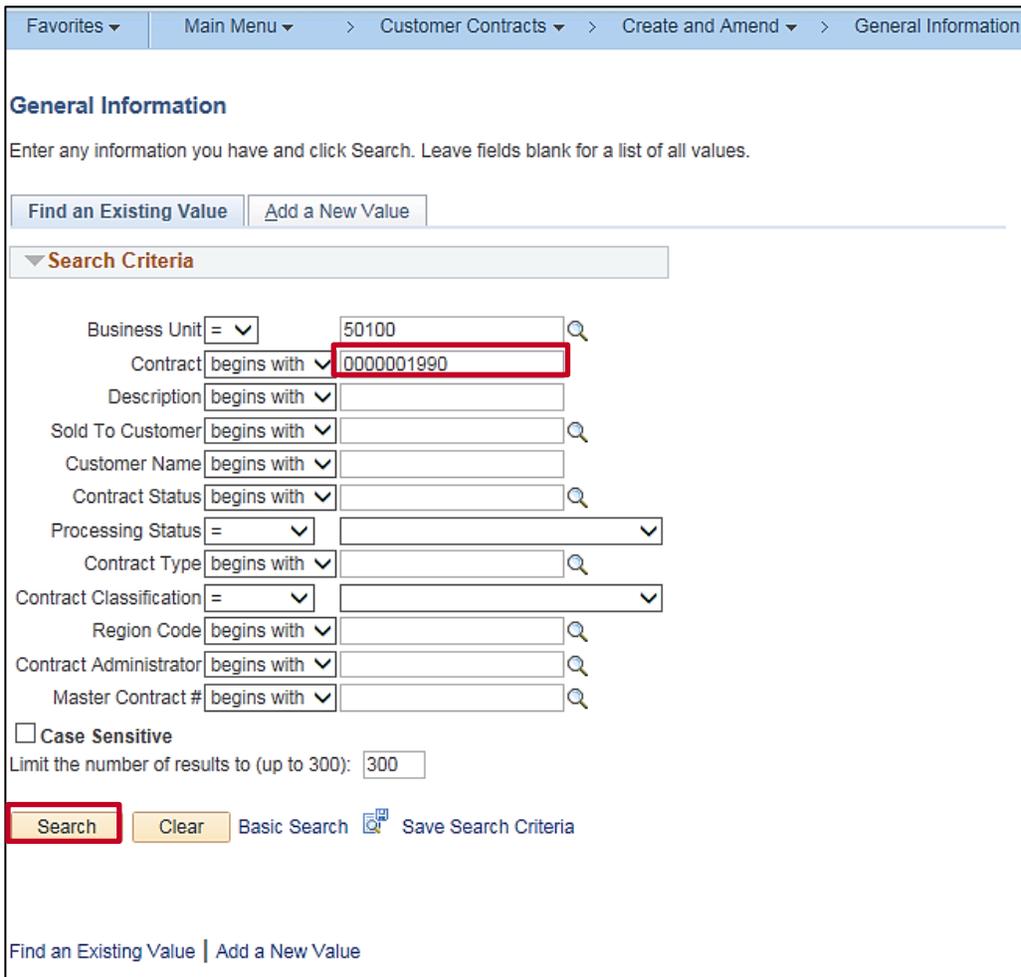
17. Select the **Ready** option.



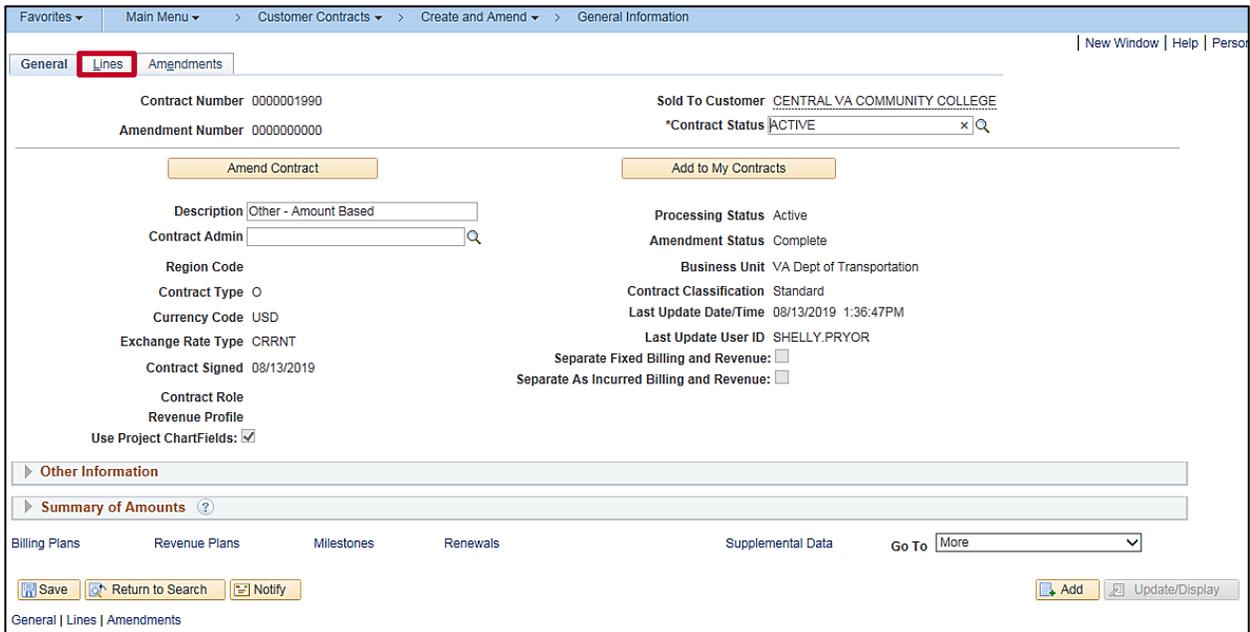
**Increase/Decrease Amount Based Contract Amount**

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

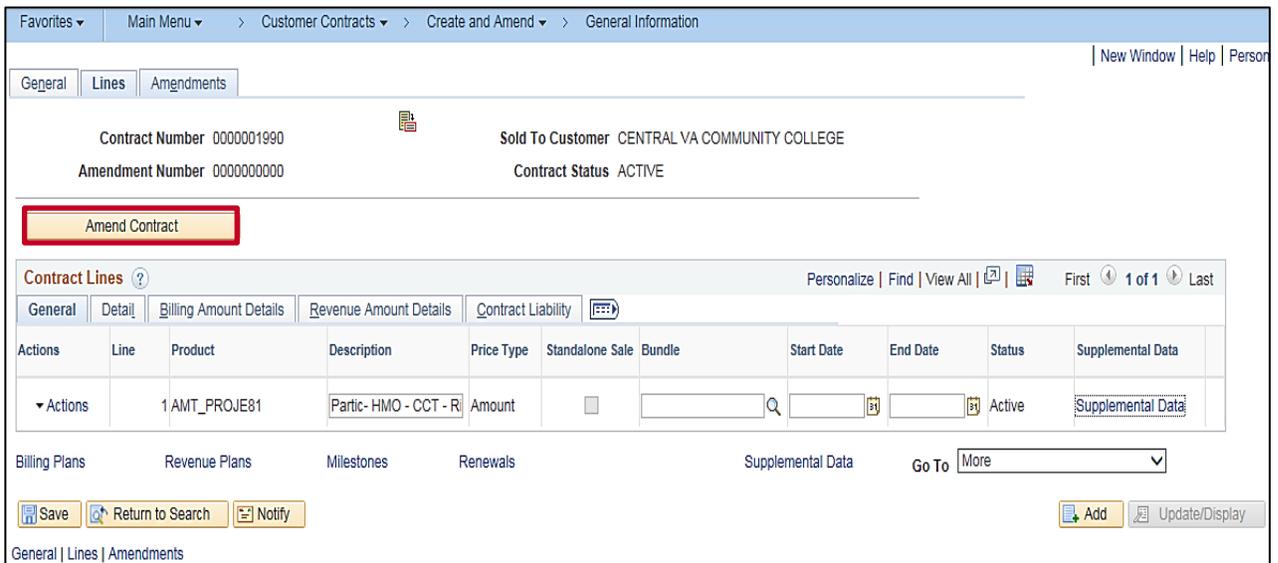
**Main Menu > Customer Contracts > Create and Amend > General Information**



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

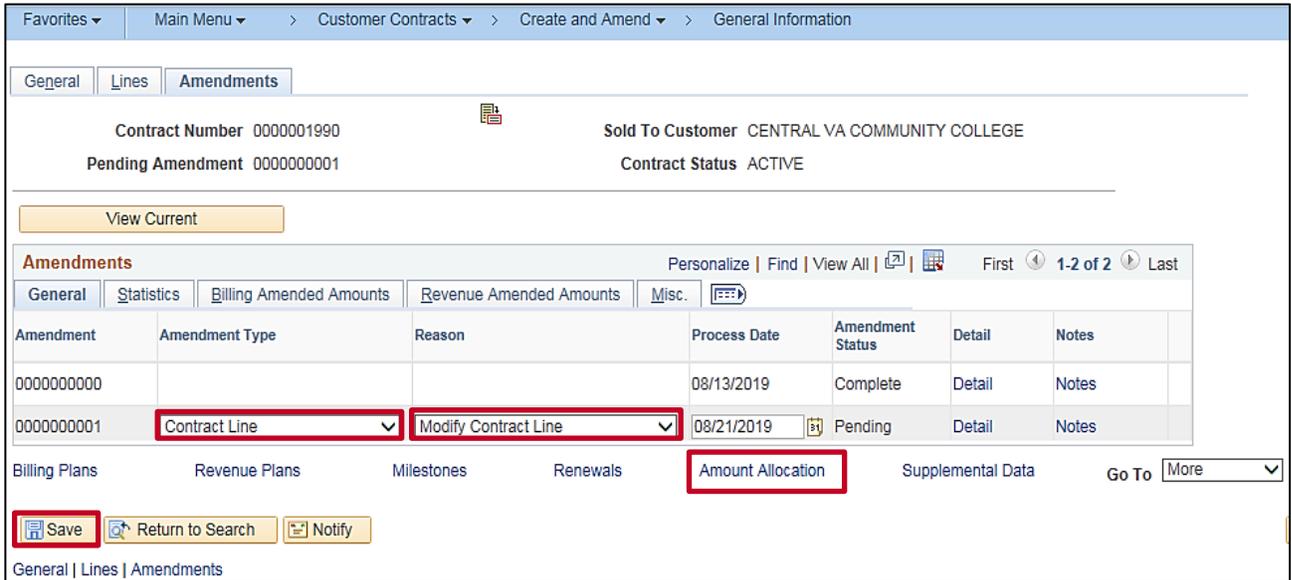


4. The **General Information** page displays.
5. Click the **Lines** tab.



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

## 501 PA354: Amending Non-Federal Customer Contracts



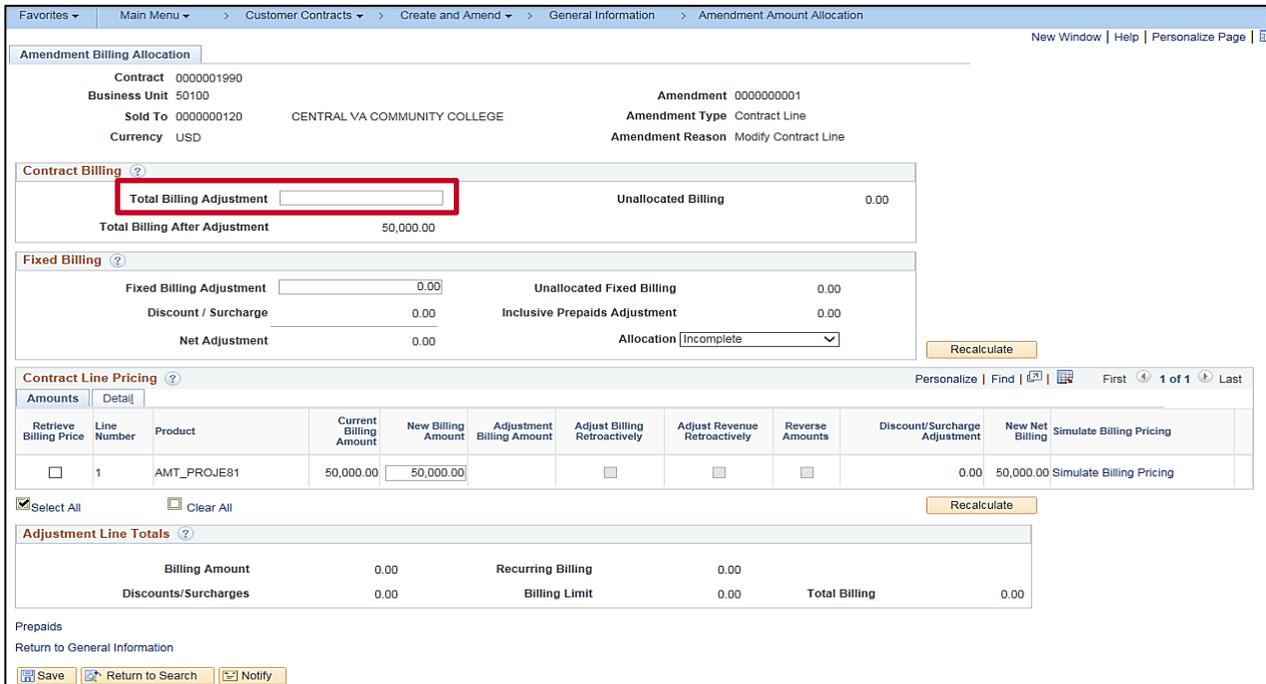
Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Pending Amendment 0000000001 Contract Status ACTIVE

View Current

**Amendments** Personalize | Find | View All | First 1-2 of 2 Last

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000			08/13/2019	Complete	Detail	Notes
0000000001	Contract Line	Modify Contract Line	08/21/2019	Pending	Detail	Notes

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



Amendment Billing Allocation

Contract 0000001990 Amendment 0000000001  
 Business Unit 50100 Amendment Type Contract Line  
 Sold To 0000000120 CENTRAL VA COMMUNITY COLLEGE Amendment Reason Modify Contract Line  
 Currency USD

**Contract Billing**

Total Billing Adjustment		Unallocated Billing	0.00
Total Billing After Adjustment	50,000.00		

**Fixed Billing**

Fixed Billing Adjustment	0.00	Unallocated Fixed Billing	0.00
Discount / Surcharge	0.00	Inclusive Prepays Adjustment	0.00
Net Adjustment	0.00	Allocation	Incomplete

**Contract Line Pricing** Personalize | Find | First 1 of 1 Last

Retrieve Billing Price	Line Number	Product	Current Billing Amount	New Billing Amount	Adjustment Billing Amount	Adjust Billing Retroactively	Adjust Revenue Retroactively	Reverse Amounts	Discount/Surcharge Adjustment	New Net Billing	Simulate Billing Pricing
<input type="checkbox"/>	1	AMT_PROJE81	50,000.00	50,000.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	50,000.00	Simulate Billing Pricing

Select All  Clear All

**Adjustment Line Totals**

Billing Amount	0.00	Recurring Billing	0.00
Discounts/Surcharges	0.00	Billing Limit	0.00
		Total Billing	0.00

Prepays  
Return to General Information

11. 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.

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Amendment Amount Allocation New Window | Help | Personalize Page |

---

**Amendment Billing Allocation**

Contract 0000001990      Amendment 0000000001  
 Business Unit 50100      Amendment Type Contract Line  
 Sold To 0000000120      CENTRAL VA COMMUNITY COLLEGE      Amendment Reason Modify Contract Line  
 Currency USD

---

**Contract Billing** ?

<b>Total Billing Adjustment</b>	40,000.00	<b>Unallocated Billing</b>	0.00
<b>Total Billing After Adjustment</b>	90,000.00		

---

**Fixed Billing** ?

<b>Fixed Billing Adjustment</b>	40,000.00	<b>Unallocated Fixed Billing</b>	0.00
<b>Discount / Surcharge</b>	0.00	<b>Inclusive Prepays Adjustment</b>	0.00
<b>Net Adjustment</b>	40,000.00	<b>Allocation</b>	Complete ▾

[Recalculate](#)

---

**Contract Line Pricing** ? Personalize | Find | | First 1 of 1 Last

Retrieve Billing Price	Line Number	Product	Current Billing Amount	New Billing Amount	Adjustment Billing Amount	Adjust Billing Retroactively	Adjust Revenue Retroactively	Reverse Amounts	Discount/Surcharge Adjustment	New Net Billing	Simulate Billing Pricing
<input type="checkbox"/>	1	AMT_PROJE81	50,000.00	90,000.00	40,000.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	90,000.00	Simulate Billing Pricing

Select All       Clear All      [Recalculate](#)

---

**Adjustment Line Totals** ?

<b>Billing Amount</b>	40,000.00	<b>Recurring Billing</b>	0.00
<b>Discounts/Surcharges</b>	0.00	<b>Billing Limit</b>	0.00
		<b>Total Billing</b>	40,000.00

Prepays

[Save](#)   [Return to Search](#)   [Notify](#)

12. 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.
13. 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**.
14. In the **Fixed Billing** section, enter the total adjustment amount (positive or negative) in the **Fixed Billing Adjustment** field.
15. 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  $50,000 + 40,000 = 90,000$ .
16. Verify that the **Adjust Billing Retroactively** and **Adjust Revenue Retroactively** check boxes and both are unchecked.
17. Click the **Recalculate** button.

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > **General Information** > Amendment Amount Allocation
 New Window | Help | Personalize Page | 

---

**Amendment Billing Allocation**

Contract 0000001990  
 Business Unit 50100  
 Sold To 000000120 CENTRAL VA COMMUNITY COLLEGE  
 Currency USD

Amendment 0000000001  
 Amendment Type Contract Line  
 Amendment Reason Modify Contract Line

---

**Contract Billing** 

Total Billing Adjustment	40,000.00	Unallocated Billing	0.00
Total Billing After Adjustment	90,000.00		

---

**Fixed Billing** 

Fixed Billing Adjustment	40,000.00	Unallocated Fixed Billing	0.00
Discount / Surcharge	0.00	Inclusive Prepays Adjustment	0.00
Net Adjustment	40,000.00	Allocation	Complete 

[Recalculate](#)

---

**Contract Line Pricing** 
Personalize | Find |  | First 1 of 1 Last

Retrieve Billing Price	Line Number	Product	Current Billing Amount	New Billing Amount	Adjustment Billing Amount	Adjust Billing Retroactively	Adjust Revenue Retroactively	Reverse Amounts	Discount/Surcharge Adjustment	New Net Billing	Simulate Billing Pricing
<input type="checkbox"/>	1	AMT_PROJE81	50,000.00	90,000.00	40,000.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	90,000.00	Simulate Billing Pricing

Select All  Clear All [Recalculate](#)

---

**Adjustment Line Totals** 

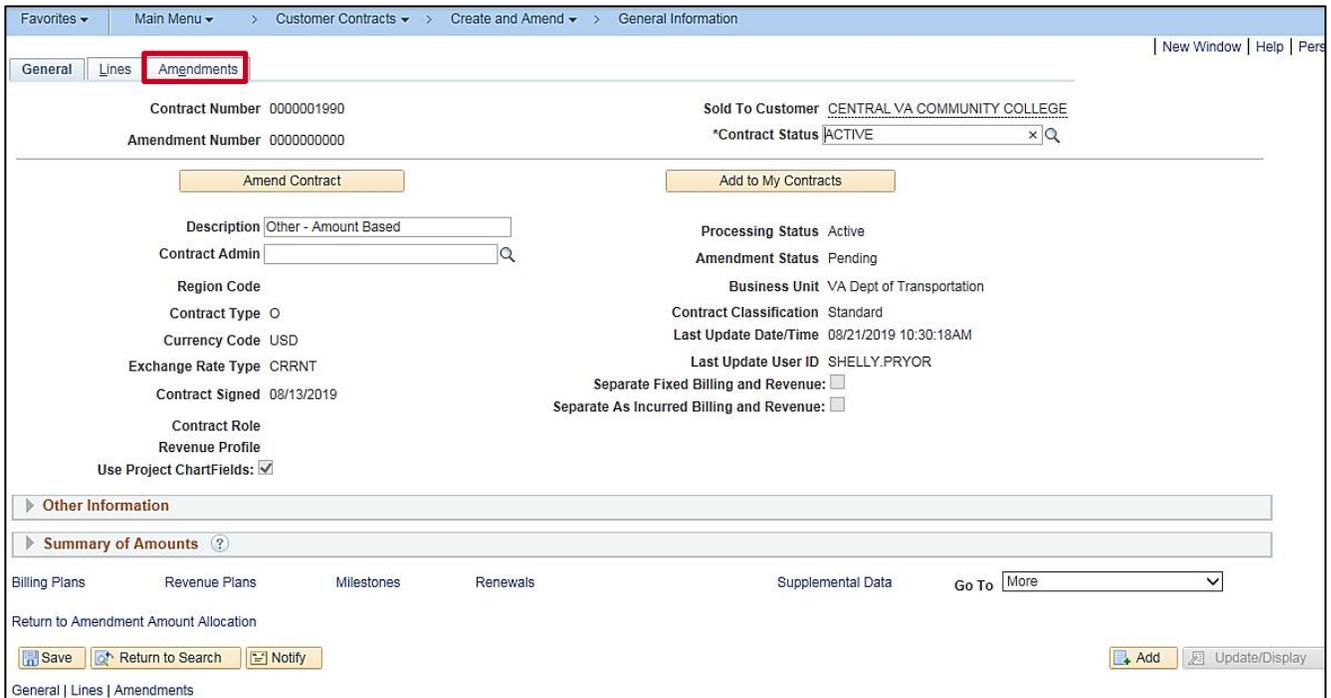
Billing Amount	40,000.00	Recurring Billing	0.00
Discounts/Surcharges	0.00	Billing Limit	0.00
		Total Billing	40,000.00

---

**Prepays**

[Save](#) [Return to Search](#) [Notify](#)

18. The **Allocation** status should change to **Allocation Complete**.
19. The **Adjust Billing Retroactively** and **Adjust Revenue Retroactively** check boxes should be **unchecked**.
20. The **Adjustment Amount** should equal the amount of your adjustment.
21. Click the **Save** button.
22. Click the **General Information** link in the navigation bar.



Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information New Window | Help | Pers

General | Lines | **Amendments**

Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Amendment Number 0000000000 \*Contract Status ACTIVE

Amend Contract Add to My Contracts

Description Other - Amount Based Processing Status Active  
 Contract Admin Contract Admin Search Amendment Status Pending  
 Region Code Business Unit VA Dept of Transportation  
 Contract Type O Contract Classification Standard  
 Currency Code USD Last Update Date/Time 08/21/2019 10:30:18AM  
 Exchange Rate Type CRRNT Last Update User ID SHELLY.PRYOR  
 Contract Signed 08/13/2019 Separate Fixed Billing and Revenue:   
 Contract Role Separate As Incurred Billing and Revenue:   
 Revenue Profile  
 Use Project ChartFields:

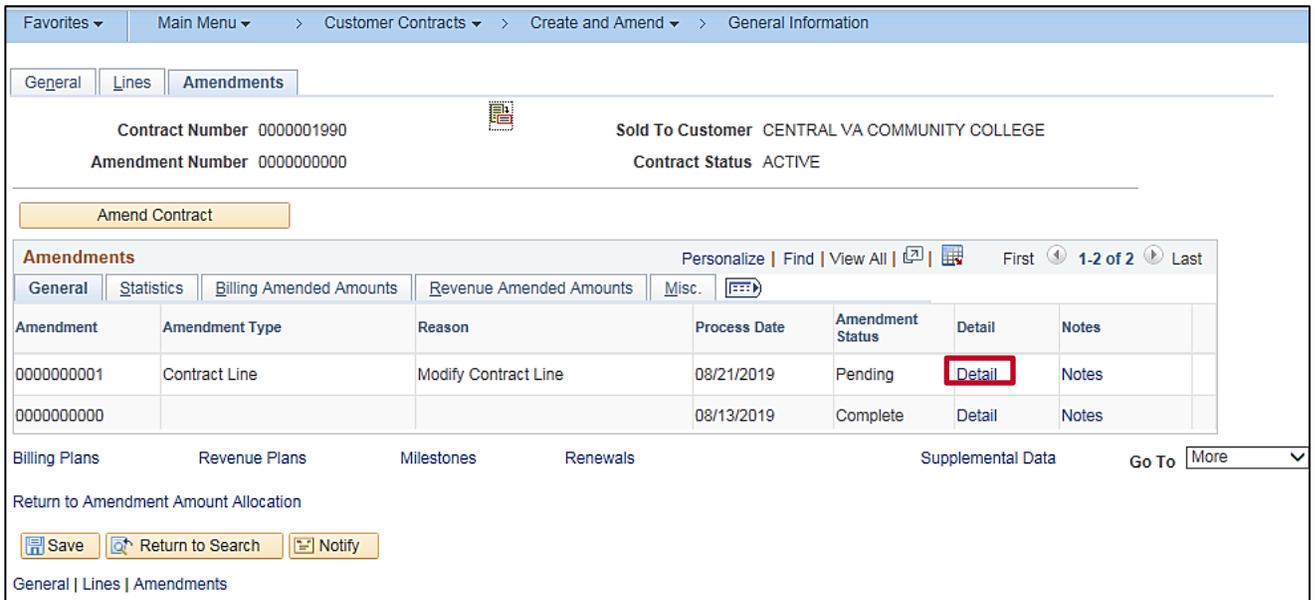
▶ Other Information  
 ▶ Summary of Amounts ?

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To More ▾

Return to Amendment Amount Allocation  
 Save Return to Search Notify Add Update/Display

General | Lines | Amendments

23. Click the **Amendments** tab.



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

General | Lines | **Amendments**

Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Amendment Number 0000000000 Contract Status ACTIVE

Amend Contract

**Amendments** Personalize | Find | View All | First 1-2 of 2 Last

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000001	Contract Line	Modify Contract Line	08/21/2019	Pending	<b>Detail</b>	Notes
0000000000			08/13/2019	Complete	Detail	Notes

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To More ▾

Return to Amendment Amount Allocation  
 Save Return to Search Notify

General | Lines | Amendments

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

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information New W

### Amendment Details

Contract 000001990 Amendment Number 000000001  
 Sold To Customer 000000120

---

Amendment Type  \*Process Date 08/21/2019  
 Amendment Reason  \*Amendment Status

Total Billing Adjustment 40,000.00 Total Revenue Adjustment 40,000.00  
 Fixed Billing Adjustment 40,000.00 Fixed Revenue Adjustment 40,000.00  
 Fixed Billing Allocation Complete Fixed Revenue Allocation Complete

▶ **Additional Amendment Details**

Reference ID  User Ref #1   
 User Ref #2

**Amendment Components** Personalize | Find | View All |   First 1-2 of 2 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Amount Allocation	Line 1	Billing Amount	Update	50000	90000
2 Amount Allocation	Line 1	Revenue Amount	Update	50000	90000

Amendment Amount Allocation Internal Notes  
 Return to General Information

25. Click the **Amend Status** drop-down menu.

26. Select the **Ready** option.

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information New Window |

### Amendment Details

Contract 000001990 Amendment Number 000000001  
 Sold To Customer 000000120

---

Amendment Type Contract Line Process Date 08/21/2019  
 Amendment Reason Modify Contract Line \*Amendment Status

Total Billing Adjustment 40,000.00 Total Revenue Adjustment 40,000.00  
 Fixed Billing Adjustment 40,000.00 Fixed Revenue Adjustment 40,000.00  
 Fixed Billing Allocation Complete Fixed Revenue Allocation Complete

▶ **Additional Amendment Details**

Reference ID  User Ref #1   
 User Ref #2

**Amendment Components** Personalize | Find | View All |   First 1-2 of 2 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Amount Allocation	Line 1	Billing Amount	Update	50000	90000
2 Amount Allocation	Line 1	Revenue Amount	Update	50000	90000

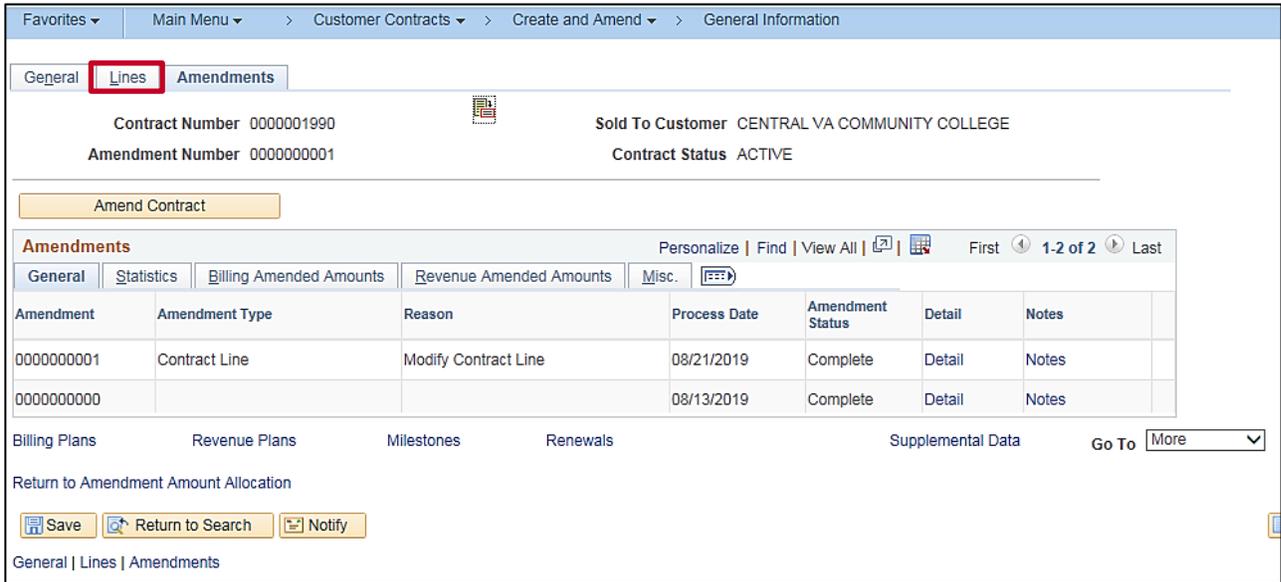
Return to General Information Internal Notes

27. The **Process Amendment** button displays.

28. Click the **Process Amendment** button.



## 501 PA354: Amending Non-Federal Customer Contracts



Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
Amendment Number 0000000001 Contract Status ACTIVE

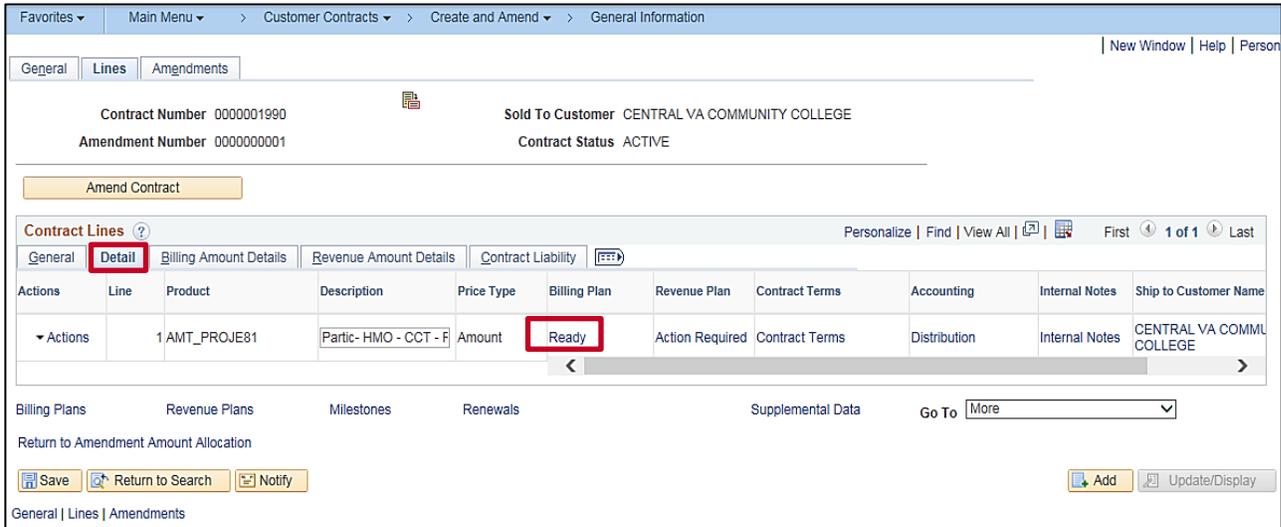
Amend Contract

**Amendments** Personalize | Find | View All | First 1-2 of 2 Last

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000001	Contract Line	Modify Contract Line	08/21/2019	Complete	Detail	Notes
0000000000			08/13/2019	Complete	Detail	Notes

Save Return to Search Notify

33. Click the **Lines** tab.



Contract Number 0000001990 Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
Amendment Number 0000000001 Contract Status ACTIVE

Amend Contract

**Contract Lines** Personalize | Find | View All | First 1 of 1 Last

Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▼ Actions	1	AMT_PROJE81	Partic- HMO - CCT - F	Amount	Ready	Action Required	Contract Terms	Distribution	Internal Notes	CENTRAL VA COMM COLLEGE

Save Return to Search Notify Add Update/Display

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 ALWAYS be reviewed regardless of the status that displays.

## 501 PA354: Amending Non-Federal Customer Contracts

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Define Billing Plan

Billing Plan General **Events** History

Contract 0000001990 BI Unit 50100  
 Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE Bill To 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Billing Plan ◀ B101 ▶ Amount Based - Milestone Currency USD

Description Amount Based - Milestone \*Billing Status Ready ▾ Actions  
 Billing Method Milestone  Hold 08/21/2019

**Customer Information**

BI Unit 50100 VA Dept of Transportation  
 \*Bill To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Addr Num 1  
 Bill To Contact

**Hold Details**

Put On Hold Date 09/21/2019

**Billing Options**

Bill Type CCT  Pre Approved  
 Bill Source PROJE  Direct Invoice  
 Summarization Template ID VDOT\_OTHER VDOT Other  
 Billing Header Note Internal Notes Preview Summarization Template

**Amount Detail**

Billing Amount	90,000.00
Total Amount	90,000.00
Total Billing History	0.00
Events Billed To Date	0.00

**Billing Default Overrides**

Invoice Form LANDSCAPE  
 Cycle ID MONTHLY View Customer Defaults  
 Bill By ID PC\_OTHER Non-Federal Project  
 Payment Method  
 Payment Terms  
 Billing Inquiry  
 Billing Specialist

36. Click the **Events** tab.

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Define Billing Plan

Billing Plan General **Events** History

Contract 0000001990 BI Unit 50100  
 Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE Bill To 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Billing Plan ◀ B101 ▶ Amount Based - Milestone Currency USD

**Define Events**

Percent  
 Amount  
[Add Milestone](#)

**Amount Detail**

Total Amount	90,000.00
Remaining Amount	40,000.00

Return to General Information

Billing Plan General | Events | History

Event Detail							Personalize	Find	First	1-2 of 2	Last
Event	Actions	Event Type	*Event Status	Event Date	Event Note	Amount					
1	▾ Actions	Date	Ready ▾	08/13/2019	Event Note	50,000.00	+	-			
2	▾ Actions	Date ▾	Pending ▾	09/13/2019	Event Note	0.00	+	-			

37. The **Events** tab displays.

Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Define Billing Plan

Billing Plan General | **Events** | History

Contract 0000001990 BI Unit 50100  
 Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE Bill To 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Billing Plan ◀ B101 ▶ Amount Based - Milestone Currency USD

**Define Events**

Percent  
 **Amount**

Add Milestone

**Amount Detail**

Total Amount 90,000.00

Remaining Amount 0.00

**Event Detail** Personalize | Find | [Print] [Refresh] First 1-2 of 2 Last

Event	Actions	Event Type	*Event Status	Event Date	Event Note	Amount
1	▼ Actions	Date	Ready	08/13/2019		50,000.00
2	▼ Actions	Date	Pending	09/13/2019		40,000.00

Return to General Information

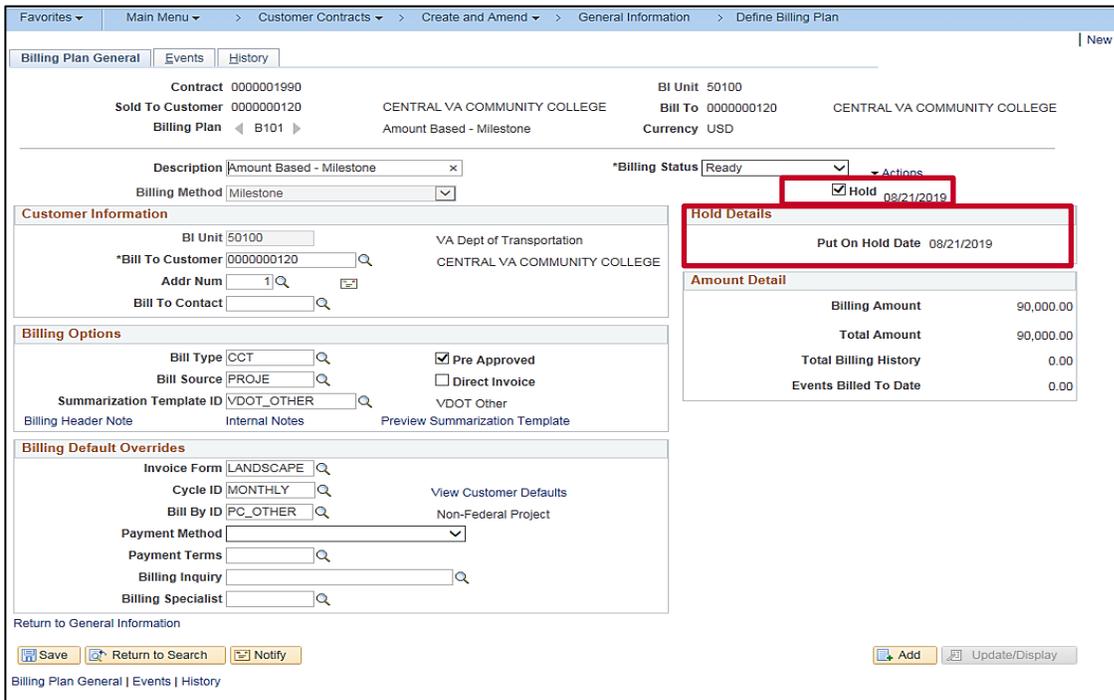
Billing Plan General | Events | History

38. In the **Define Events** section, verify **Amount** is selected. If not, select **Amount**.
39. In the **Event Detail** section of the page, a new Event row displays. Update 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.

## 501 PA354: Amending Non-Federal Customer Contracts



Contract 0000001990 BI Unit 50100  
 Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE Bill To 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Billing Plan B101 Amount Based - Milestone Currency USD

Description Amount Based - Milestone \*Billing Status Ready  
 Billing Method Milestone  Hold 08/21/2019

**Customer Information**  
 BI Unit 50100 VA Dept of Transportation  
 \*Bill To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Addr Num 1  
 Bill To Contact

**Hold Details**  
 Put On Hold Date 08/21/2019

Amount Detail	
Billing Amount	90,000.00
Total Amount	90,000.00
Total Billing History	0.00
Events Billed To Date	0.00

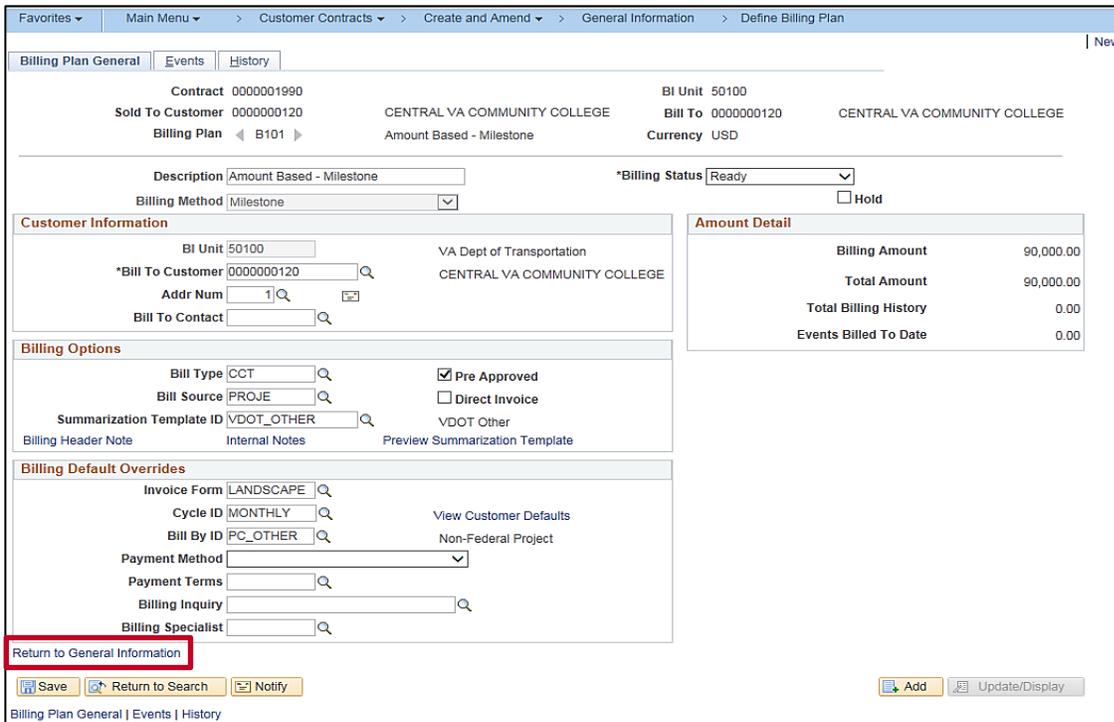
**Billing Options**  
 Bill Type CCT  Pre Approved  
 Bill Source PROJE  Direct Invoice  
 Summarization Template ID VDOT\_OTHER VDOT Other  
 Billing Header Note Internal Notes Preview Summarization Template

**Billing Default Overrides**  
 Invoice Form LANDSCAPE  
 Cycle ID MONTHLY View Customer Defaults  
 Bill By ID PC\_OTHER Non-Federal Project  
 Payment Method  
 Payment Terms  
 Billing Inquiry  
 Billing Specialist

Return to General Information  
 Save Return to Search Notify Add Update/Display

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**.



Contract 0000001990 BI Unit 50100  
 Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE Bill To 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Billing Plan B101 Amount Based - Milestone Currency USD

Description Amount Based - Milestone \*Billing Status Ready  
 Billing Method Milestone  Hold

**Customer Information**  
 BI Unit 50100 VA Dept of Transportation  
 \*Bill To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE  
 Addr Num 1  
 Bill To Contact

**Amount Detail**

Billing Amount	90,000.00
Total Amount	90,000.00
Total Billing History	0.00
Events Billed To Date	0.00

**Billing Options**  
 Bill Type CCT  Pre Approved  
 Bill Source PROJE  Direct Invoice  
 Summarization Template ID VDOT\_OTHER VDOT Other  
 Billing Header Note Internal Notes Preview Summarization Template

**Billing Default Overrides**  
 Invoice Form LANDSCAPE  
 Cycle ID MONTHLY View Customer Defaults  
 Bill By ID PC\_OTHER Non-Federal Project  
 Payment Method  
 Payment Terms  
 Billing Inquiry  
 Billing Specialist

Return to General Information  
 Save Return to Search Notify Add Update/Display

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

Contract Number 000001990      Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Amendment Number 000000001      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 Liability

Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
Actions	1	AMT_PROJE81	Partic- HMO - CCT - F	Amount	Ready	<b>Action Required</b>	Contract Terms	Distribution	Internal Notes	CENTRAL VA COMMU COLLEGE

Billing Plans    Revenue Plans    Milestones    Renewals    Supplemental Data    Go To More

Return to Amendment Amount Allocation

Save    Return to Search    Notify    Add    Update/Display

General | Lines | Amendments

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

Favorites > Main Menu > Customer Contracts > Create and Amend > General Information > Define Revenue Plan

**Revenue Plan**

Contract 000001990      Business Unit 50100      Currency USD  
 Sold To Customer 000000120      CENTRAL VA COMMUNITY COLLEGE      GL Business Unit 50100  
 Revenue Plan R101      GL Currency USD

Description Amount Based - Milestone      \*Plan Status Action Required

Recognition Method Milestone       Hold

**Define Events By**

Percent  
 Amount  
 Internal Notes Preview Revenue  
 Add Milestone

**Amount Detail**

Total Amount	90,000.00
Remaining Amount	40,000.00

**Event Detail** Personalize | Find | View All | First 1-2 of 2 Last

Event	Event Type	*Event Status	Accounting Date	Amount
1	Date	Ready	08/13/2019	50,000.00
2	Date	Pending	09/13/2019	0.00

Return to General Information

Save    Return to Search    Notify    Add    Update/Display

49. 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 ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Define Revenue Plan

---

Revenue Plan

**Revenue Plan**  
 Contract 0000001990 Business Unit 50100 Currency USD  
 Sold To Customer 0000000120 CENTRAL VA COMMUNITY COLLEGE GL Business Unit 50100  
 Revenue Plan ◀ R101 ▶ GL Currency USD

---

Description  \*Plan Status  Actions  
 Recognition Method Milestone  Hold

**Define Events By**

Percent  
 **Amount**  
 Internal Notes Preview Revenue  
 Add Milestone

**Amount Detail**

Total Amount	90,000.00
Remaining Amount	0.00

---

**Event Detail** Personalize | Find | View All | First 1-2 of 2 Last

Event	Event Type	*Event Status	Accounting Date	Amount
1	Date	Ready	08/13/2019	50,000.00
2	Date	Ready	09/13/2019	40,000.00

Return to General Information

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

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Define Revenue Plan](#)

**Revenue Plan**

**Revenue Plan**  
 Contract 0000001990      Business Unit 50100      Currency USD  
 Sold To Customer 0000000120      CENTRAL VA COMMUNITY COLLEGE      GL Business Unit 50100  
 Revenue Plan ◀ R101 ▶      GL Currency USD

Description       \*Plan Status       Actions  
 Recognition Method Milestone       Hold

**Define Events By**

Percent  
 Amount  
 Internal Notes      Preview Revenue  
 Add Milestone

**Amount Detail**

Total Amount	90,000.00
Remaining Amount	0.00

**Event Detail**      Personalize | Find | View All |  |       First 1-2 of 2 Last

Event	Event Type	*Event Status	Accounting Date		Amount
1	<input type="text" value="Date"/>	<input type="text" value="Ready"/>	<input type="text" value="08/13/2019"/>	Event Note	<input type="text" value="50,000.00"/>
2	<input type="text" value="Date"/>	<input type="text" value="Ready"/>	<input type="text" value="09/13/2019"/>	Event Note	<input type="text" value="40,000.00"/>

[Return to General Information](#)  
                 

57. The **Plan Status** updates from **Action Required** to **Ready**.

58. Click the **Return to General Information** link.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#)

[General](#) | [Lines](#) | [Amendments](#)

Contract Number 0000001990      Sold To Customer CENTRAL VA COMMUNITY COLLEGE  
 Amendment Number 0000000001      Contract Status ACTIVE

**Amendments**      Personalize | Find | View All |  |       First 1-2 of 2 Last

[General](#) | [Statistics](#) | [Billing Amended Amounts](#) | [Revenue Amended Amounts](#) | [Misc.](#) |

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000001	Contract Line	Modify Contract Line	08/21/2019	Complete	<a href="#">Detail</a>	Notes
0000000000			08/13/2019	Complete	<a href="#">Detail</a>	Notes

Billing Plans      Revenue Plans      Milestones      Renewals      Supplemental Data      Go To

Return to Amendment Amount Allocation

General | Lines | Amendments

59. The **Contract Amount** is updated and complete.