

Steps to Update Federal Contract Status Overview

Contract Status provides a visual indicator of where your contract is in the contract life cycle, and it designates when a contract is available for lookup and processing. It is a user-defined value that controls what processing can occur against the contract.

The **Contract Status** defaults to **Pending** when a contract is created. You can select a different contract status on the **General Information** page. When changing the **Contract Status**, you can only move forward. Once the status is set to **Active**, it cannot be set back to **Pending**, and once **Closed** it cannot go back to **Active**. Once a **Contract Status** is set to **Closed**, you can only reactivate it via the Help Desk.

If you select a **Contract Status** that is mapped to a different contract **Processing Status**, the system performs edit checking to ensure that the contract is eligible for the new status that you selected.

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Federal Contract Statuses

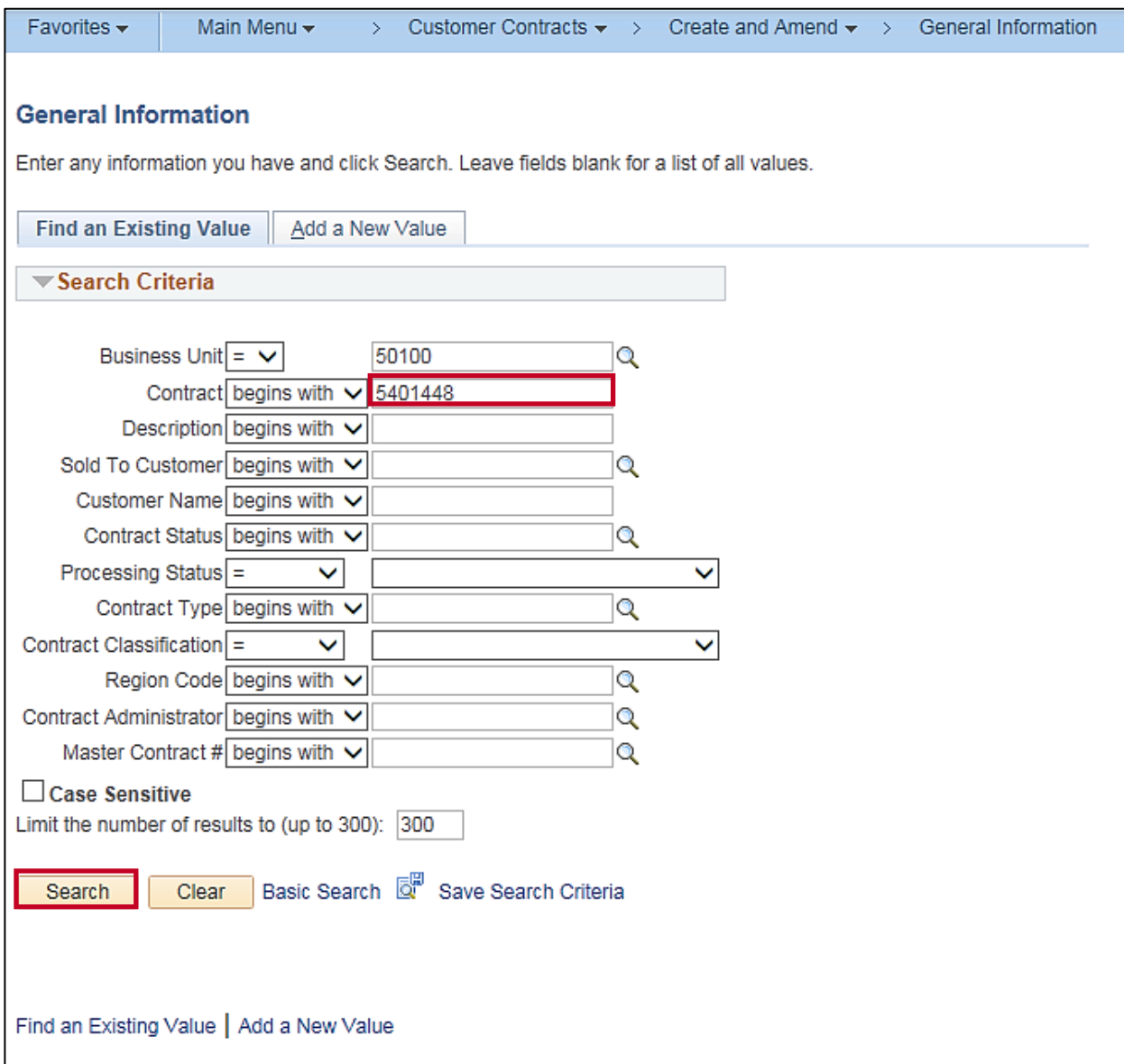
Status	Use
PENDING	Default status when you create a new contract and indicates that the contract was created and some data was entered. No downstream processing is allowed for the contract.
ACTIVE	All contract data is entered and has passed system data validation and has an Active Processing Status. Controlled data fields are available for entry only through amendment processing. Downstream processing is allowed for the contract.
CLOSED	<p>The contract is no longer available for processing and data fields cannot be entered or amended. No downstream processing is allowed for the contract.</p> <p>Contracts in CLOSED status are removed from processing and views, but the historical contract data is still available for query. Once a contract is CLOSED, it cannot be reactivated without submitting a ticket to the Help Desk.</p>
FIRE - CLOSED*	The federal project has been closed as the result of a FIRE Review. The Processing Status is Active, therefore processing can occur against this contract at a later date when project expenditures and billings have been reconciled.
FV ACCEPTED	The final voucher has been paid. The Processing Status is Closed, indicating the contract is no longer available for processing and data fields cannot be entered or amended.
FV COMPLETED	The Final Voucher has been completed for the contract; however, the Processing Status remains Active, therefore processing can occur against this contract.
WITHDRAWN *	The federal project has been withdrawn; however, the Processing Status remains Active, therefore processing can occur against this contract.

* **WITHDRAWN** and **FIRE - CLOSED** were created so that the contract **Processing Status** can still be **Active**. In some cases, these contracts need to be opened again for use.

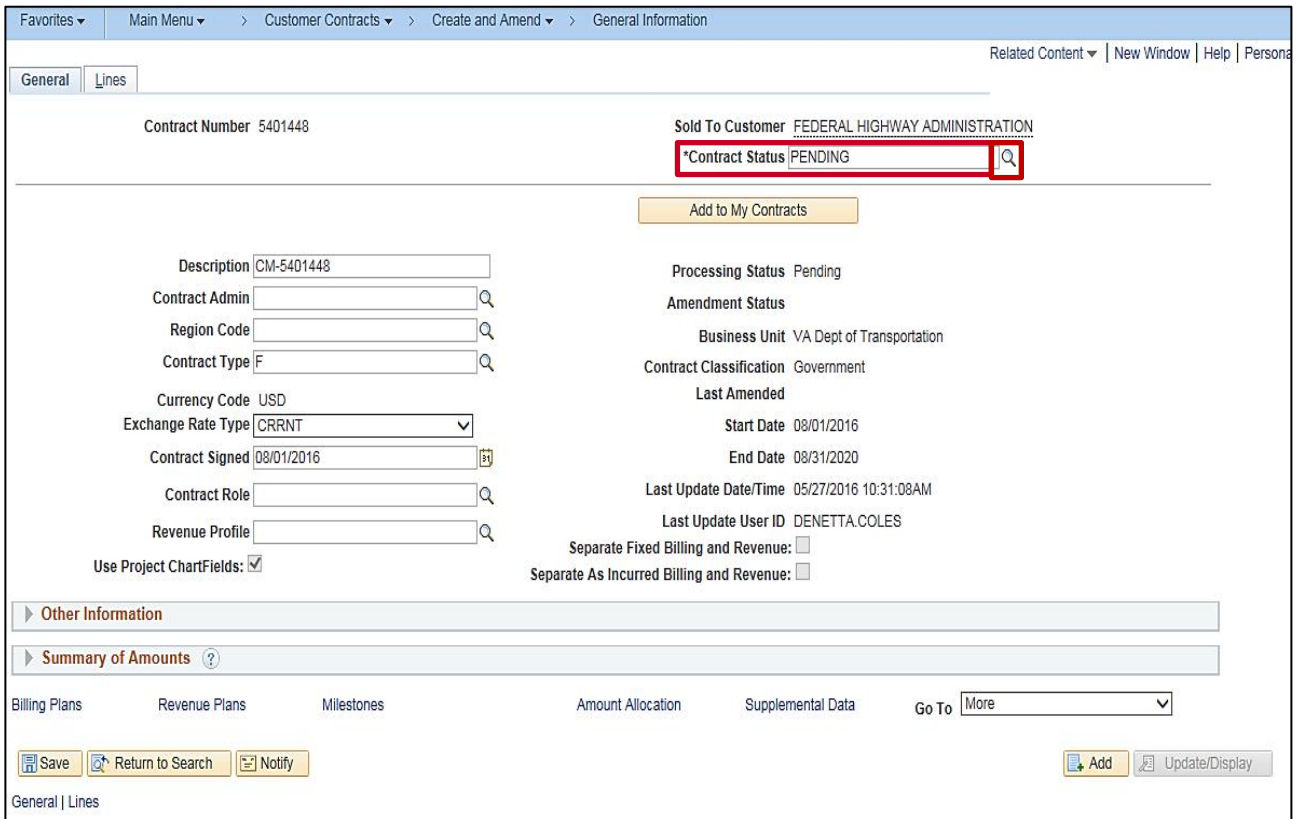
Update Contract Status to ACTIVE, CLOSED, or FV COMPLETED

The steps to update the **Contract Status** to **ACTIVE, CLOSED, and FV COMPLETED** are virtually the same.

1. Access the **General Information** page for the contract using the following path:
Main Menu > Customer Contracts > Create and Amend > General Information



2. **Business Unit: 50100**
3. **Contract:** Enter the **Contract** number for the contract you wish to update.
4. Click the **Search** button.



Contract Number 5401448 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION
*Contract Status PENDING

Add to My Contracts

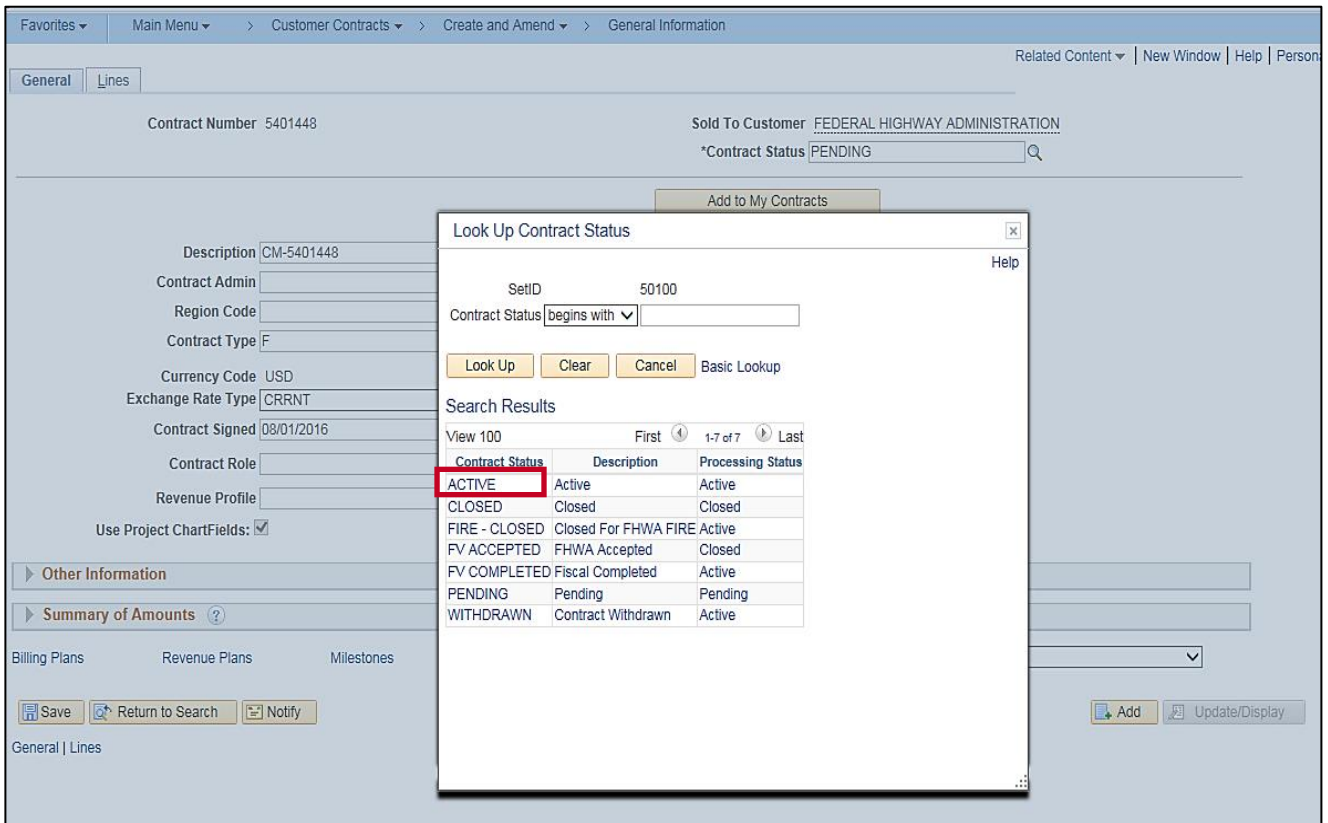
Description CM-5401448 Processing Status Pending
Contract Admin [lookup] Amendment Status
Region Code [lookup] Business Unit VA Dept of Transportation
Contract Type F Contract Classification Government
Currency Code USD Last Amended
Exchange Rate Type CRRNT Start Date 08/01/2016
Contract Signed 08/01/2016 End Date 08/31/2020
Contract Role [lookup] Last Update Date/Time 05/27/2016 10:31:08AM
Revenue Profile [lookup] Last Update User ID DENETTA.COLES
Use Project ChartFields: Separate Fixed Billing and Revenue:
Separate As Incurred Billing and Revenue:

Other Information
Summary of Amounts

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

Save Return to Search Notify Add Update/Display

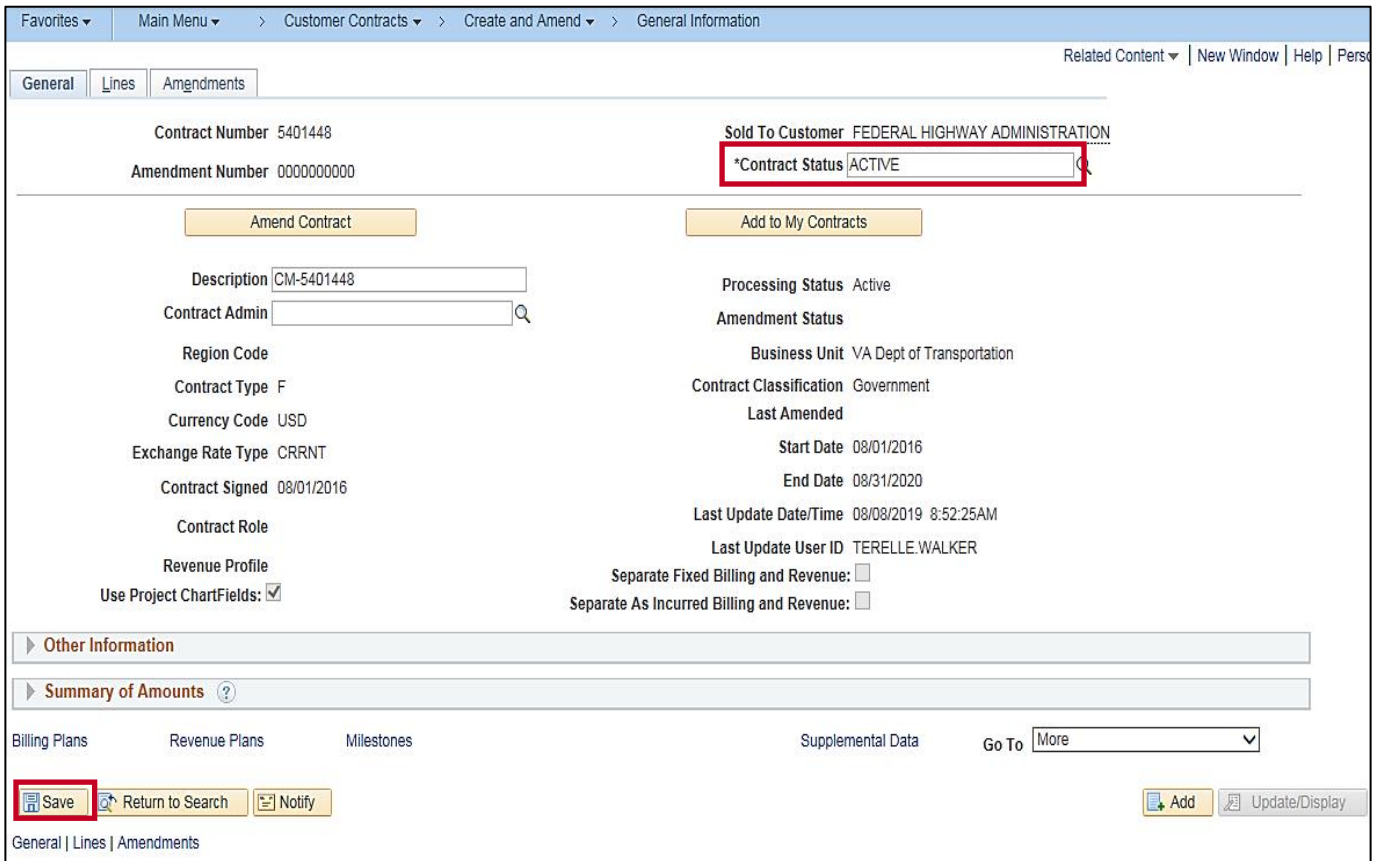
5. The **General Information** page, **General** tab displays.
6. In the example above the **Contract Status** is **PENDING**.
7. Click on the lookup icon next to the **Contract Status** field.



The screenshot shows the 'Look Up Contract Status' pop-up window. The window title is 'Look Up Contract Status'. It contains a search criteria section with 'SetID' set to '50100' and 'Contract Status' set to 'begins with'. Below this are 'Look Up', 'Clear', and 'Cancel' buttons. The search results are displayed in a table with the following data:

Contract Status	Description	Processing Status
ACTIVE	Active	Active
CLOSED	Closed	Closed
FIRE - CLOSED	Closed For FHWA FIRE	Active
FV ACCEPTED	FHWA Accepted	Closed
FV COMPLETED	Fiscal Completed	Active
PENDING	Pending	Pending
WITHDRAWN	Contract Withdrawn	Active

8. The **Look Up Contract Status** pop-up window displays.
9. Click on **ACTIVE**, **CLOSED**, or **FV COMPLETED**. For this scenario, **ACTIVE** is selected.



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

General | Lines | Amendments

Contract Number 5401448 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION
 Amendment Number 0000000000 *Contract Status ACTIVE

Amend Contract Add to My Contracts

Description CM-5401448 Processing Status Active
 Contract Admin Contract Admin Amendment Status
 Region Code Business Unit VA Dept of Transportation
 Contract Type F Contract Classification Government
 Currency Code USD Last Amended
 Exchange Rate Type CRRNT Start Date 08/01/2016
 Contract Signed 08/01/2016 End Date 08/31/2020
 Contract Role Last Update Date/Time 08/08/2019 8:52:25AM
 Revenue Profile Last Update User ID TERELLE.WALKER
 Use Project ChartFields: Separate Fixed Billing and Revenue:
 Separate As Incurred Billing and Revenue:

Other Information
 Summary of Amounts ?

Billing Plans Revenue Plans Milestones Supplemental Data Go To More ▾

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

10. The **General Information** page, **General** tab displays.

11. Click the **Save** button. If the new **Contract Status** is:

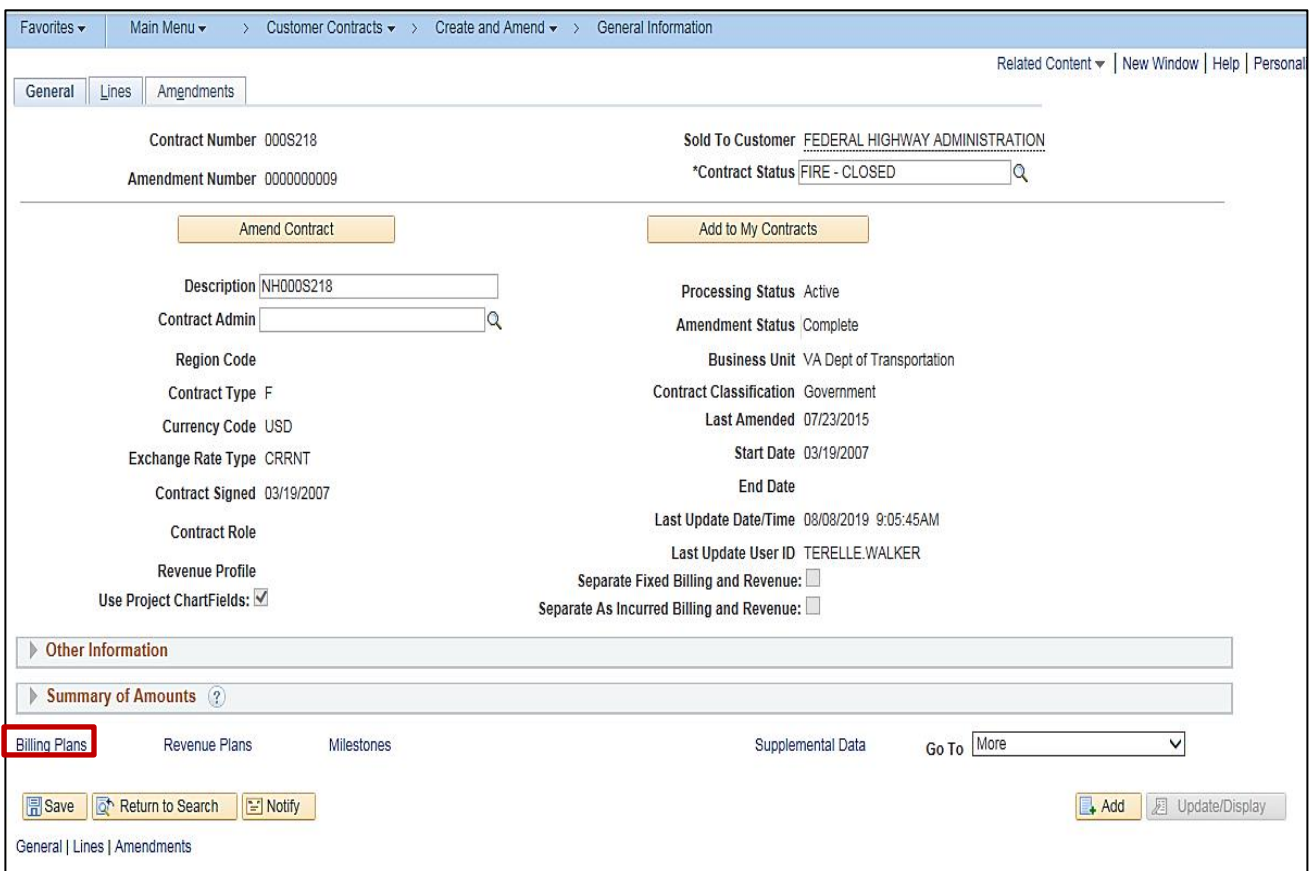
- a. **ACTIVE**: After you **Save**, the **Amend Contract** button and **Amendments** tab are now available. Changes you wish to make to the contract will need to be processed through an amendment.
- b. **CLOSED**: After you **Save**, the **Amend Contract** button and **Amendments** tab are no longer available and the data fields cannot be modified.
- c. **FV COMPLETED**: After you **Save**, the **Amend Contract** button and **Amendments** tab are still available. Changes you wish to make to the contract will need to be processed through an amendment.

Update Contract Status to FIRE - CLOSED or WITHDRAWN

When setting the **Contract Status** to **FIRE – CLOSED** you may be required to lower the **Transaction Limit(s)** to the processed amount(s). Therefore, you will need to process an **Amendment** to the contract.

You will follow the same steps to update the **Contract Status** to **FIRE - CLOSED** and **WITHDRAWN**:

1. Access the contract.
2. Verify that any Amendments are processed (i.e., **Amendment Status** is **Complete**).

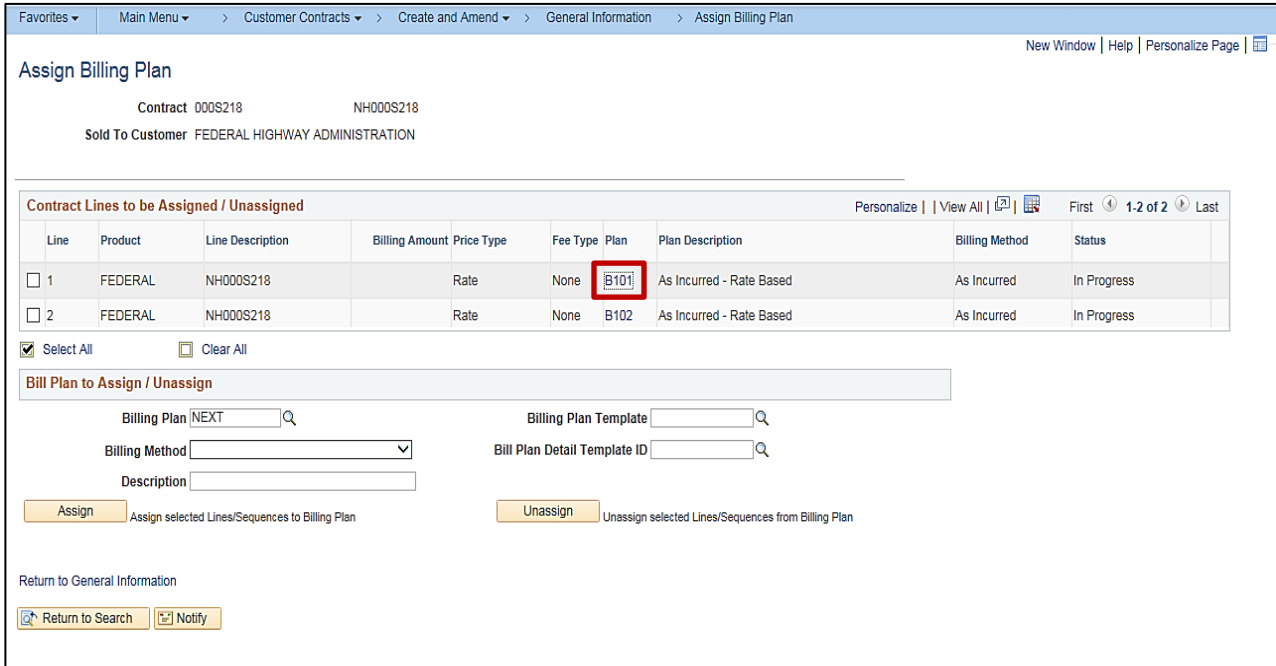


The screenshot shows a web application interface for contract management. The breadcrumb trail is: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information. The interface has tabs for General, Lines, and Amndments. The 'General' tab is active, showing contract details for Contract Number 000S218 and Amendment Number 000000009. The 'Contract Status' is set to 'FIRE - CLOSED'. The 'Amendment Status' is 'Complete'. The 'Billing Plans' link is highlighted with a red box. Other links include Revenue Plans, Milestones, and Supplemental Data. The 'Go To' dropdown is set to 'More'. The interface also includes buttons for Save, Return to Search, Notify, Add, and Update/Display.

3. Click the **Billing Plans** link.

Place the Billing Plan on Hold

Once the Billing Plan is placed on **Hold**, new billable amount (**BIL**) lines will not be created until the **Hold** has been removed. The steps to place a **Revenue Plan** on **Hold** are the same except you would choose the **Revenue Plan** related hyperlinks.



Assign Billing Plan

Contract 000S218 NH000S218
Sold To Customer FEDERAL HIGHWAY ADMINISTRATION

Line	Product	Line Description	Billing Amount	Price Type	Fee Type	Plan	Plan Description	Billing Method	Status
<input type="checkbox"/> 1	FEDERAL	NH000S218		Rate	None	B101	As Incurred - Rate Based	As Incurred	In Progress
<input type="checkbox"/> 2	FEDERAL	NH000S218		Rate	None	B102	As Incurred - Rate Based	As Incurred	In Progress

Select All Clear All

Bill Plan to Assign / Unassign

Billing Plan: NEXT

Billing Method:

Description:

Billing Plan Template:

Bill Plan Detail Template ID:

Assign selected Lines/Sequences to Billing Plan

Unassign selected Lines/Sequences from Billing Plan

[Return to General Information](#)

- The **Assign Billing Plan** page displays.
- Click the **Bill Plan** hyperlink for the **Bill Plan** that needs to be placed on **Hold**.

501 PA353: Steps to Update Federal Contract Status

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Assign Billing Plan](#) > [Define Billing Plan](#)
New Window

Billing Plan General | [Events](#) | [History](#)

Contract 000S218 **BI Unit** 50100
Sold To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION **Bill To** 0000055002 FEDERAL HIGHWAY ADMINISTRATION
Billing Plan ◀ B101 ▶ As Incurred - Rate Based **Currency** USD

Description ***Billing Status** ▼ Actions
Billing Method ▼ Hold

Customer Information

BI Unit VA Dept of Transportation

***Bill To Customer** 🔍 FEDERAL HIGHWAY ADMINISTRATION

Addr Num 🔍

Bill To Contact 🔍

Tolerance Options

Minimum Bill Amount

Final Bill

Billing Options

Bill Type 🔍 Pre Approved
Bill Source 🔍 Direct Invoice
Summarization Template ID 🔍 VDOT FHWA
Purchase Order

[Billing Header Note](#) [Internal Notes](#) [Preview Summarization Template](#)

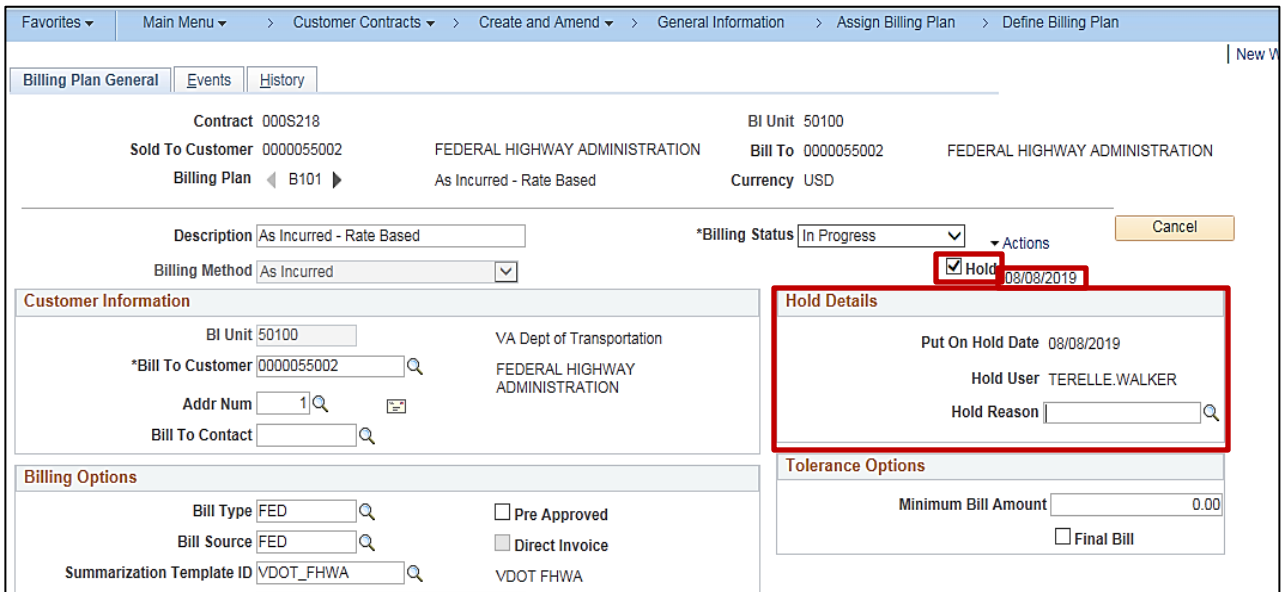
Billing Default Overrides

Invoice Form 🔍 [View Customer Defaults](#)
Cycle ID 🔍 Project Federal
Bill By ID 🔍 Project Federal
Payment Method ▼
Payment Terms 🔍
Billing Inquiry 🔍
Billing Specialist 🔍

[Return to Assign Billing Plan](#)

Billing Plan General | [Events](#) | [History](#)

6. The **Billing Plan General** tab displays.



The screenshot shows a software interface for updating a federal contract status. The breadcrumb trail is: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information > Assign Billing Plan > Define Billing Plan. The interface is divided into several sections:

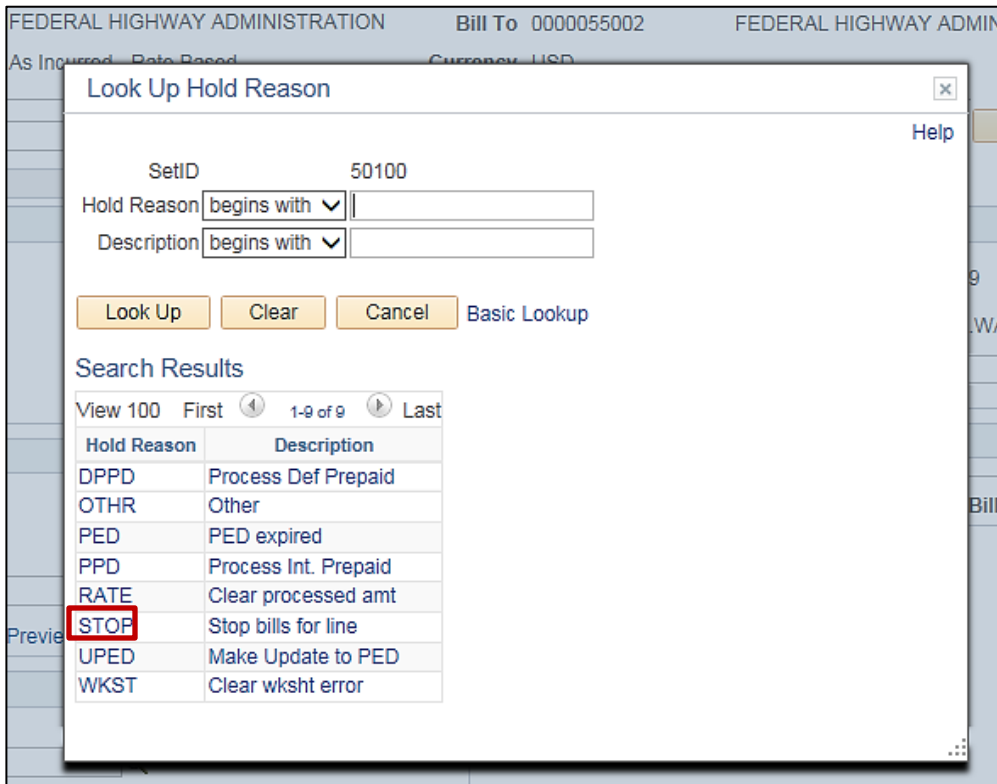
- Billing Plan General:** Contract 000S218, BI Unit 50100, Sold To Customer 0000055002 (FEDERAL HIGHWAY ADMINISTRATION), Bill To 0000055002 (FEDERAL HIGHWAY ADMINISTRATION), Billing Plan B101, As Incurred - Rate Based, Currency USD.
- Description:** As Incurred - Rate Based, *Billing Status: In Progress (dropdown), Actions: Hold, 08/08/2019, Cancel button.
- Customer Information:** BI Unit 50100 (VA Dept of Transportation), *Bill To Customer 0000055002 (FEDERAL HIGHWAY ADMINISTRATION), Addr Num 1, Bill To Contact.
- Billing Options:** Bill Type FED, Bill Source FED, Summarization Template ID VDOT_FHWA, Pre Approved, Direct Invoice, Final Bill.
- Hold Details (highlighted in red):** Put On Hold Date 08/08/2019, Hold User TERELLE.WALKER, Hold Reason (lookup icon).
- Tolerance Options:** Minimum Bill Amount 0.00.

7. Select the **Hold check box under the **Billing Status**.**

The date that you select this box displays to the right of the check box. This is the effective date of the **Hold**.

8. The **Hold Details section displays, with three fields:**

- a. **Put On Hold Date:** populates with the current date which matches the date that displays next to the check box.
- b. **Hold User:** populates with the name of the person who placed the Hold.
- c. **Hold Reason:** click the lookup icon to select the reason for the hold.



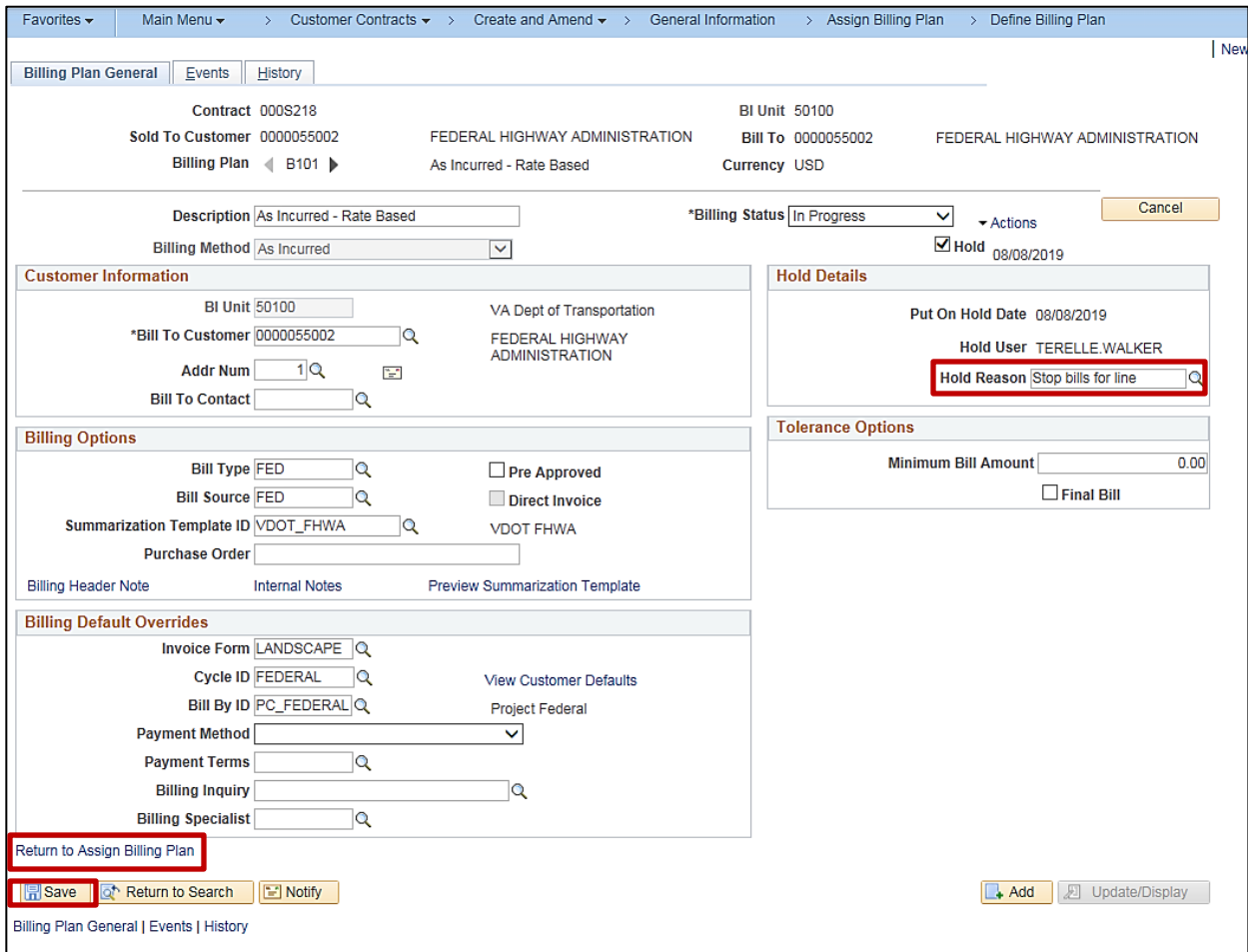
9. The **Hold Reason** pop-up window displays. See the table below for a list of Hold reasons and the Description and the Type of Contract each hold reason applies to:

Hold Reason	Description	Type of Contract
DPPD	Process Def Prepaid	Non-Federal
OTHR	Other	Federal and Non-Federal
PED	PED expired	Federal
PPD	Process Int. Prepaid	Non-Federal
RATE	Clear processed amt	Federal and Non-Federal
STOP	Stop bills for line	Federal and Non-Federal
UPED	Make Update to PED	Federal
WKST	Clear wksht error	Federal

Note: Be sure to select the correct hold reason based on the contract. There are no edits for this field, so if you select one that does not match with the contract type, Cardinal will not display an error message.

For this scenario, **STOP** is selected.

501 PA353: Steps to Update Federal Contract Status



Contract 000S218 BI Unit 50100
 Sold To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION Bill To 0000055002 FEDERAL HIGHWAY ADMINISTRATION
 Billing Plan B101 As Incurred - Rate Based Currency USD

Description As Incurred - Rate Based *Billing Status In Progress
 Billing Method As Incurred Hold 08/08/2019

Customer Information
 BI Unit 50100 VA Dept of Transportation
 *Bill To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION
 Addr Num 1
 Bill To Contact

Hold Details
 Put On Hold Date 08/08/2019
 Hold User TERELLE.WALKER
Hold Reason Stop bills for line

Billing Options
 Bill Type FED Pre Approved
 Bill Source FED Direct Invoice
 Summarization Template ID VDOT_FHWA VDOT FHWA
 Purchase Order

Billing Default Overrides
 Invoice Form LANDSCAPE
 Cycle ID FEDERAL View Customer Defaults
 Bill By ID PC_FEDERAL Project Federal
 Payment Method
 Payment Terms
 Billing Inquiry
 Billing Specialist

[Return to Assign Billing Plan](#)

10. The **Hold Reason** field populates with the description for the hold selected.
11. Click the **Save** button.
12. Click the **Return to Assign Billing Plan** hyperlink.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Assign Billing Plan](#)
New Window | Help | Personalize Page

Assign Billing Plan

Contract 000S218 NH000S218
 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION

Contract Lines to be Assigned / Unassigned Personalize | View All | First 1-2 of 2 Last

Line	Product	Line Description	Billing Amount	Price Type	Fee Type	Plan	Plan Description	Billing Method	Status
<input type="checkbox"/> 1	FEDERAL	NH000S218		Rate	None	B101	As Incurred - Rate Based	As Incurred	In Progress
<input type="checkbox"/> 2	FEDERAL	NH000S218		Rate	None	B102	As Incurred - Rate Based	As Incurred	In Progress

Select All Clear All

Bill Plan to Assign / Unassign

Billing Plan
 Billing Method
 Description

Billing Plan Template
 Bill Plan Detail Template ID

Assign selected Lines/Sequences to Billing Plan
 Unassign selected Lines/Sequences from Billing Plan

13. The **Assign Billing Plan** page displays.
14. Click the **Return to General Information** hyperlink.
15. The **General Information** page, **General** tab displays.

501 PA353: Steps to Update Federal Contract Status

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

[Related Content](#) | [New Window](#) | [Help](#) | [Person](#)

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

Contract Number 000S218 **Sold To Customer** FEDERAL HIGHWAY ADMINISTRATION
Amendment Number 000000009 **Contract Status** ACTIVE

[Amend Contract](#)

Contract Lines
[Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1-2 of 2](#) | [Last](#)

[General](#) | **[Detail](#)** | [Billing Amount Details](#) | [Revenue Amount Details](#)

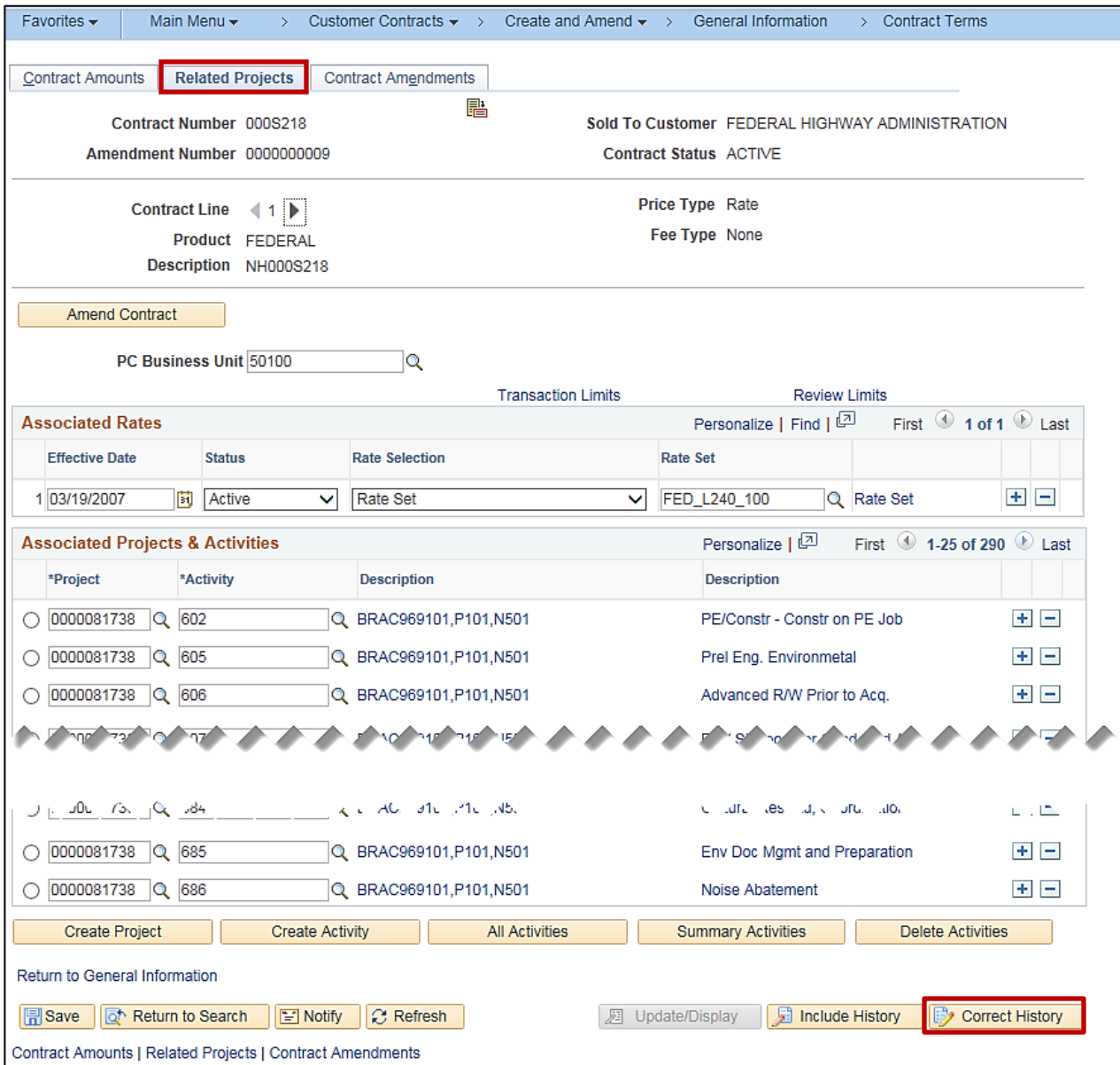
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▼ Actions	1	FEDERAL	NH000S218	Rate	In Progress	In Progress	Contract Terms	Distribution	Internal Notes	FEDERAL HIGHWAY ADMINISTRATION
▼ Actions	2	FEDERAL	NH000S218	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	FEDERAL HIGHWAY ADMINISTRATION

[Billing Plans](#) [Revenue Plans](#) [Milestones](#) [Supplemental Data](#) [Go To](#) [More](#)

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

General | Lines | Amendments

16. Click the **Lines** tab.
17. In the **Contract Lines** section, click the **Detail** tab.
18. Click the **Contract Terms** hyperlink.



The screenshot shows a software interface for managing contract terms. The breadcrumb trail at the top reads: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information > Contract Terms. Below this, there are three tabs: 'Contract Amounts', 'Related Projects' (highlighted with a red box), and 'Contract Amendments'. The main content area displays contract details for Contract Number 000S218 and Amendment Number 0000000009, with Sold To Customer FEDERAL HIGHWAY ADMINISTRATION and Contract Status ACTIVE. A 'Contract Line' section shows Product FEDERAL and Description NH000S218. Below this is an 'Amend Contract' button and a search field for 'PC Business Unit' with the value 50100. There are sections for 'Associated Rates' and 'Associated Projects & Activities'. The 'Associated Projects & Activities' table lists several projects with IDs like 0000081738 and activities like 602, 605, 606, 685, and 686. At the bottom of the interface, there are several buttons: 'Create Project', 'Create Activity', 'All Activities', 'Summary Activities', and 'Delete Activities'. Below these are 'Return to General Information', 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History' (highlighted with a red box). The breadcrumb trail at the very bottom reads: Contract Amounts | Related Projects | Contract Amendments.

19. Click the **Related Projects** tab
20. Click the **Correct History** button at the bottom of the page.

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

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

Contract Number 000S218 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION
 Amendment Number 000000009 Contract Status ACTIVE

Contract Line ◀ 1 ▶ Price Type Rate
 Product FEDERAL Fee Type None
 Description NH000S218

Amend Contract

PC Business Unit

Transaction Limits Review Limits

Associated Rates Personalize | Find | First 1 of 1 Last

Effective Date	Status	Rate Selection	Rate Set
1 03/19/2007	Inactive	Rate Set	Rate Set

Associated Projects & Activities Personalize | First 1-25 of 290 Last

*Project	*Activity	Description	Description
<input type="radio"/> 0000081738	<input type="text" value="602"/>	BRAC969101,P101,N501	PE/Constr - Constr on PE Job
<input type="radio"/> 0000081738	<input type="text" value="605"/>	BRAC969101,P101,N501	Prel Eng. Environmental
<input type="radio"/> 0000081738	<input type="text" value="606"/>	BRAC969101,P101,N501	Advanced LRW/Prior to Ac
<input type="radio"/> 0000081738	<input type="text" value="685"/>	BRAC969101,P101,N501	Env Doc Mgmt and Preparation
<input type="radio"/> 0000081738	<input type="text" value="686"/>	BRAC969101,P101,N501	Noise Abatement

[Create Project](#) [Create Activity](#) [All Activities](#) [Summary Activities](#) [Delete Activities](#)

[Return to General Information](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

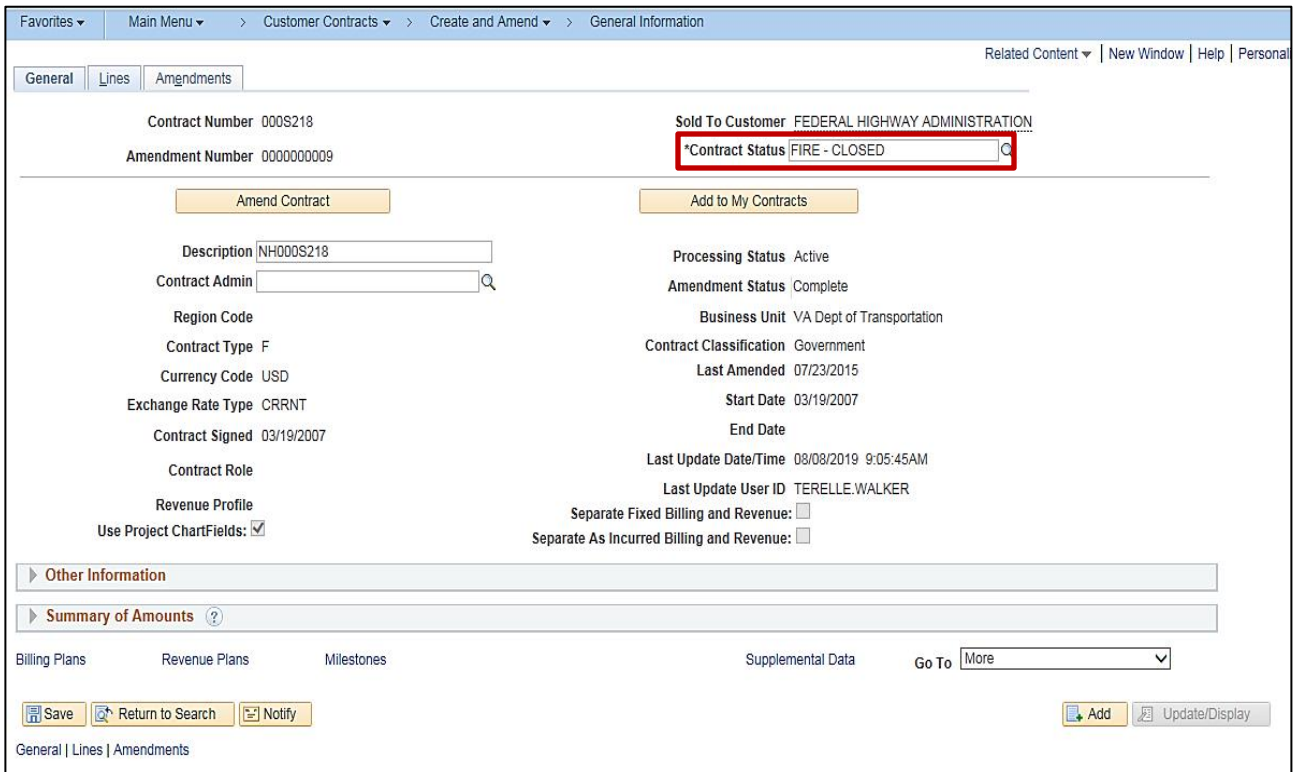
[Contract Amounts](#) | [Related Projects](#) | [Contract Amendments](#)

21. In the **Associated Rates** section, update the following fields:

- a. **Status:** Change to **Inactive**
- b. **Rate Set:** Remove the **Rate Set**

22. Click the **Save** button.

23. Click the **Return to General Information** hyperlink.



Contract Number 000S218
Amendment Number 000000009

Sold To Customer FEDERAL HIGHWAY ADMINISTRATION
*Contract Status FIRE - CLOSED

Amend Contract Add to My Contracts

Description NH000S218
Contract Admin [lookup icon]
Region Code
Contract Type F
Currency Code USD
Exchange Rate Type CRRNT
Contract Signed 03/19/2007
Contract Role
Revenue Profile
Use Project ChartFields:

Processing Status Active
Amendment Status Complete
Business Unit VA Dept of Transportation
Contract Classification Government
Last Amended 07/23/2015
Start Date 03/19/2007
End Date
Last Update Date/Time 08/08/2019 9:05:45AM
Last Update User ID TERELLE.WALKER
Separate Fixed Billing and Revenue:
Separate As Incurred Billing and Revenue:

Other Information
Summary of Amounts ?

Billing Plans Revenue Plans Milestones Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

24. The **General Information** page displays. Click the **General** tab.
25. Click the lookup icon next to the **Contract Status** field. The **Look Up Contract Status** pop-up window displays.
26. Click on **FIRE - CLOSED**.
27. The **Contract Status** updates to **FIRE-CLOSED**.
28. Click the **Save** button.

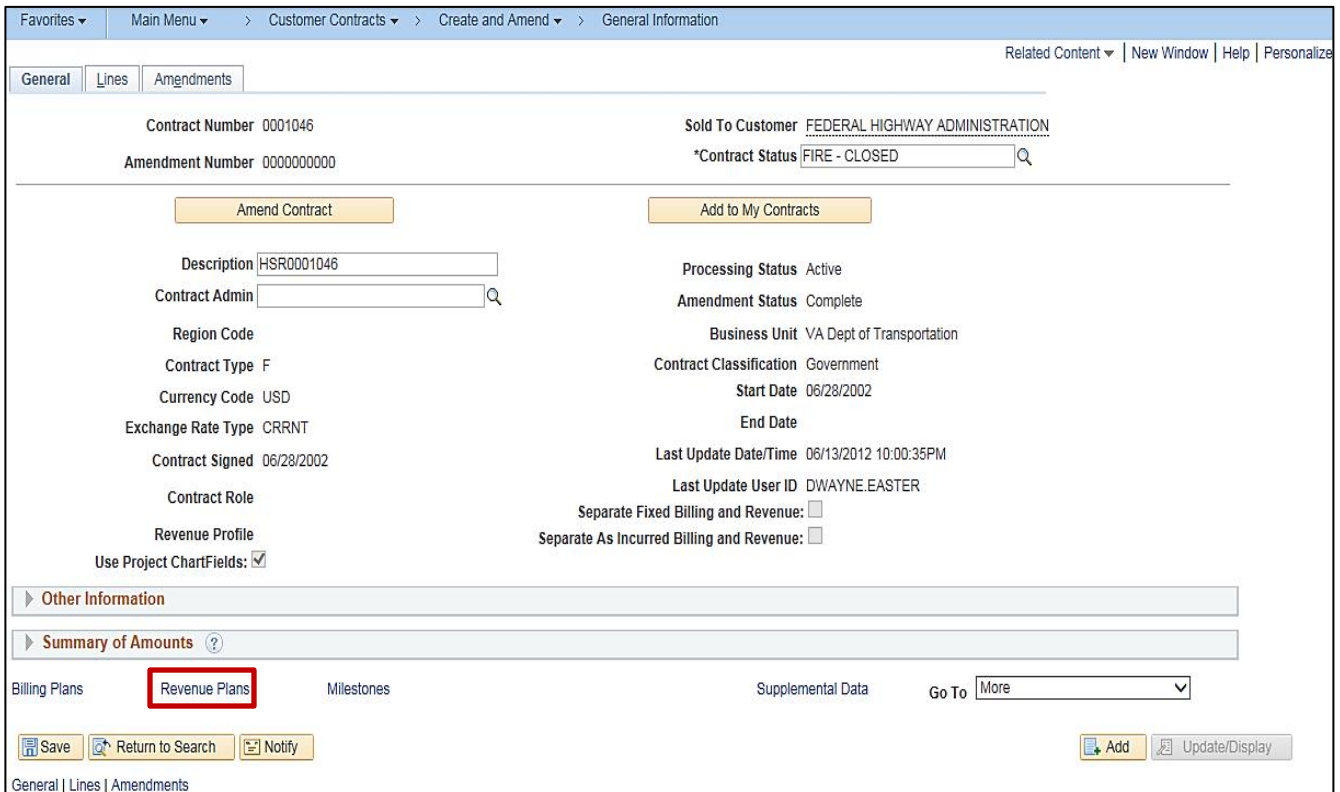
Change Contract Status to FV ACCEPTED

When processing a modification which indicates the final voucher has been paid:

1. Access the contract, amend **Transaction Limits** as needed, update the Billing Plan's **Billing Status** to **Completed** and update the **Associated Rate Status** to **Inactive**, and remove the **Rate Set**.
2. Update the **Revenue Plan Status** to **Completed**.

Place the Revenue Plan on Hold

The steps to place the **Revenue Plan** on **Hold** are the same as when you placed the **Billing Plan** on **Hold**, except you would choose the **Revenue Plan** related hyperlinks.



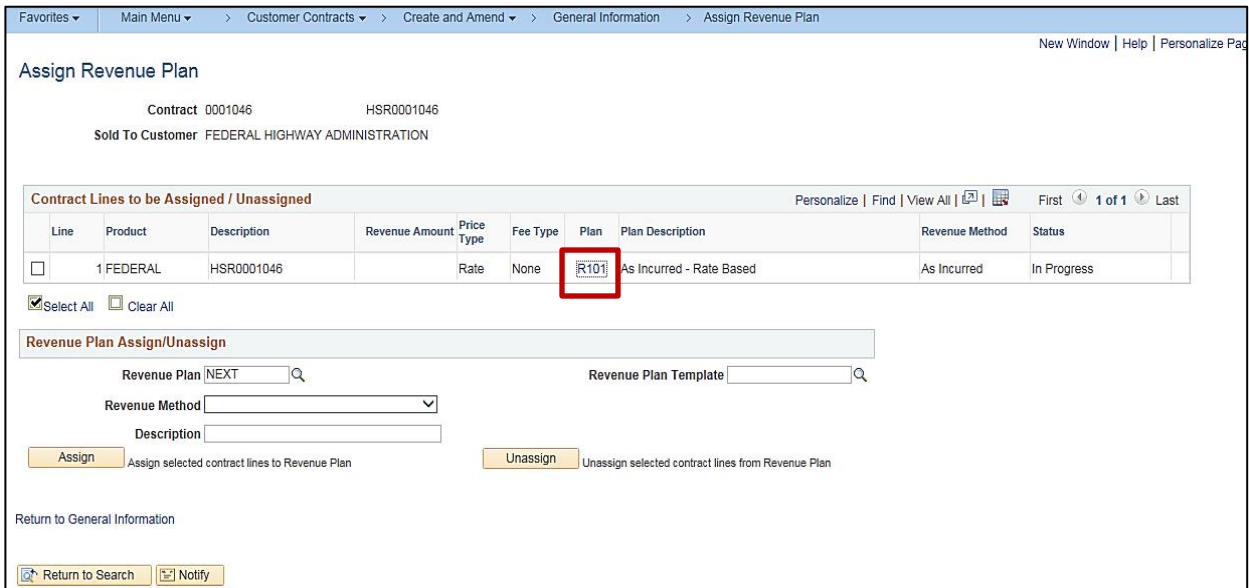
The screenshot shows the 'General Information' page for a contract. The breadcrumb trail is: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information. The page has tabs for 'General', 'Lines', and 'Amendments'. The 'General' tab is active.

Contract details include:

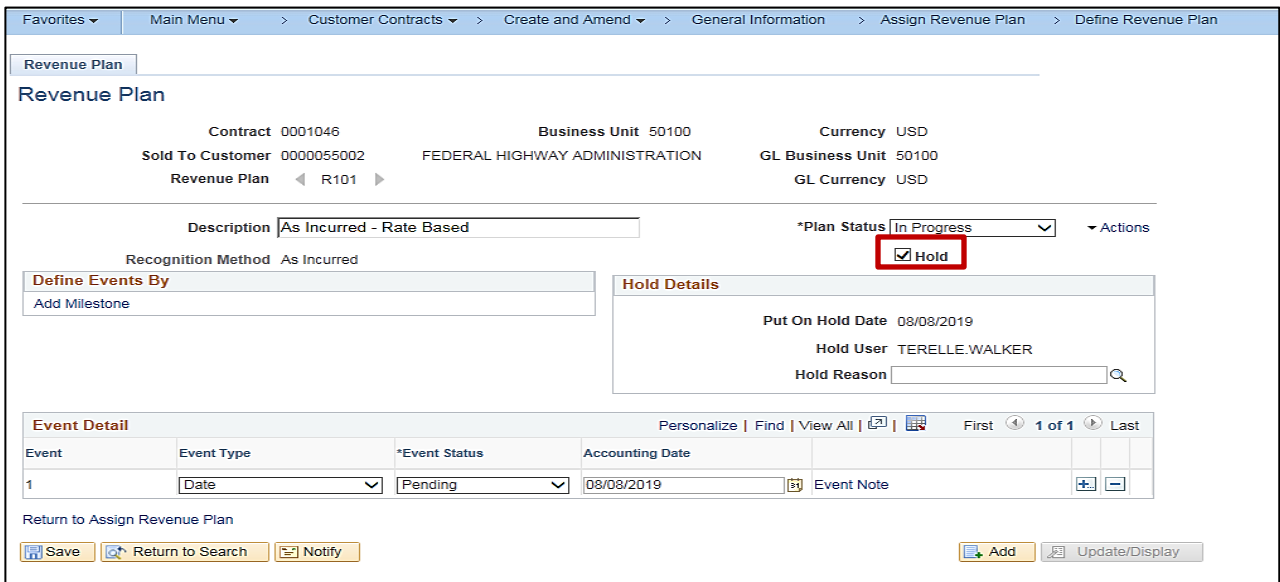
- Contract Number: 0001046
- Amendment Number: 000000000
- Sold To Customer: FEDERAL HIGHWAY ADMINISTRATION
- *Contract Status: FIRE - CLOSED
- Description: HSR0001046
- Processing Status: Active
- Amendment Status: Complete
- Region Code: [empty]
- Business Unit: VA Dept of Transportation
- Contract Type: F
- Contract Classification: Government
- Currency Code: USD
- Start Date: 06/28/2002
- Exchange Rate Type: CRRNT
- End Date: [empty]
- Contract Signed: 06/28/2002
- Last Update Date/Time: 06/13/2012 10:00:35PM
- Contract Role: [empty]
- Last Update User ID: DWAYNE.EASTER
- Revenue Profile: [empty]
- Separate Fixed Billing and Revenue:
- Use Project ChartFields:
- Separate As Incurred Billing and Revenue:

At the bottom of the page, there are sections for 'Other Information' and 'Summary of Amounts'. Below these are navigation links: 'Billing Plans', 'Revenue Plans' (highlighted with a red box), and 'Milestones'. There are also buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

3. From the **General Information** page, **General** tab, click the **Revenue Plans** hyperlink.



4. The **Assign Revenue Plan** page displays.



5. Click the **Revenue Plan** hyperlink for the **Revenue Plan** that needs to be placed on **Hold**.

6. The **Hold Details** section displays, with three fields:

- a. **Put On Hold Date:** populates with the current date which matches the date that displays next to the check box.
- b. **Hold User:** populates with the name of the person who placed the Hold.
- c. **Hold Reason:** click the lookup icon to select the reason for the hold.

Business Unit 50100 Currency USD

Look Up Hold Reason ✕

Help

SetID 50100

Hold Reason begins with

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-9 of 9 Last

Hold Reason	Description
DPPD	Process Def Prepaid
KTST	PUM Test Hold reason
OTHR	Other
PED	PED expired
PPD	Process Int. Prepaid
RATE	Clear processed amt
STOP	Stop bills for line
UPED	Make Update to PED
WKST	Clear wsht error

7. Select the reason for the hold from the list. For this scenario, **OTHR** is selected.

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

Revenue Plan

Contract 0001046 **Business Unit** 50100 **Currency** USD
Sold To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION **GL Business Unit** 50100
Revenue Plan ◀ R101 ▶ **GL Currency** USD

Description × ***Plan Status** ▼ ▼ Actions
Recognition Method As Incurred Hold

Define Events By

[Add Milestone](#)

Hold Details

Put On Hold Date 08/08/2019

Hold User TERELLE.WALKER

Hold Reason 🔍

Event Detail Personalize | Find | View All | 📄 | 📅 | First ◀ 1 of 1 ▶ Last

Event	Event Type	*Event Status	Accounting Date	
1	<input type="text" value="Date"/> ▼	<input type="text" value="Pending"/> ▼	<input type="text" value="08/08/2019"/> 📅	Event Note <input type="text"/> + -

[Return to Assign Revenue Plan](#)

8. Click the **Save** button.
9. Click the **Return to Assign Revenue Plan** hyperlink. The **Assign Revenue Plan** page displays.
10. Click the **Return to General Information** hyperlink. The **General Information** page, General tab displays.

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

Related Content | New Window | Help | Personalize

General **Lines** Amendments

Contract Number 0001046 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION
Amendment Number 0000000000 Contract Status FIRE - CLOSED

Amend Contract

Contract Lines ? Personalize | Find | View All | [?] | [?] First 1 of 1 Last

General **Detail** Billing Amount Details Revenue Amount Details [FFA]

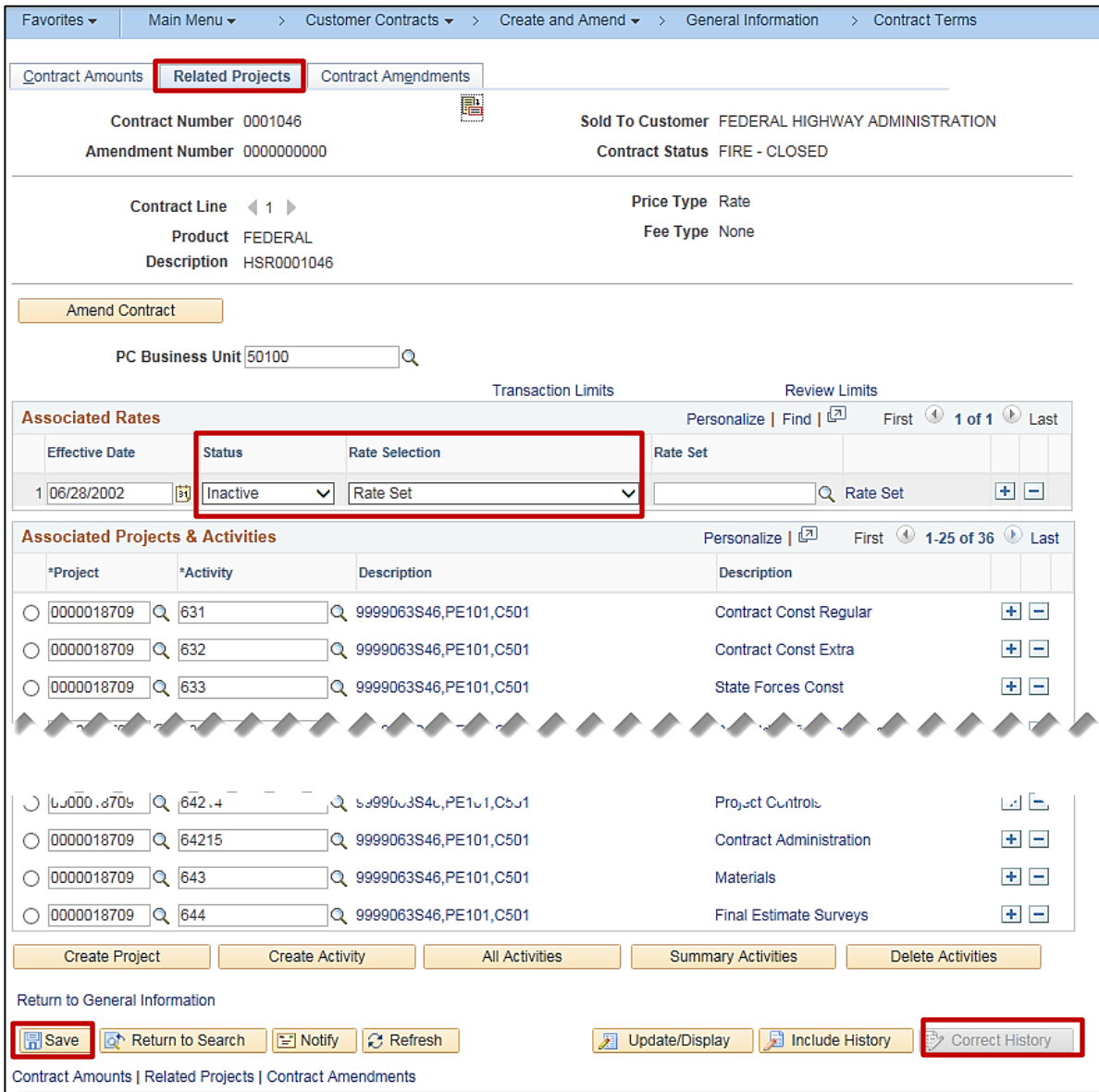
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▼ Actions	1	FEDERAL	HSR0001046	Rate	Completed	In Progress	Contract Terms	Distribution	Internal Notes	FEDERAL HIGHWAY ADMINISTRATION

Billing Plans Revenue Plans Milestones Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

11. Click the **Lines** tab.
12. In the **Contract Lines** section, click on the **Detail** tab.
13. Click the **Contract Terms** hyperlink.



The screenshot shows a software interface for contract management. At the top, there are navigation tabs: Favorites, Main Menu, Customer Contracts, Create and Amend, General Information, and Contract Terms. Below this, there are three sub-tabs: Contract Amounts, **Related Projects** (highlighted with a red box), and Contract Amendments.

Contract details include: Contract Number 0001046, Amendment Number 0000000000, Sold To Customer FEDERAL HIGHWAY ADMINISTRATION, and Contract Status FIRE - CLOSED.

Contract Line 1 is selected, with Product FEDERAL and Description HSR0001046. Price Type is Rate and Fee Type is None.

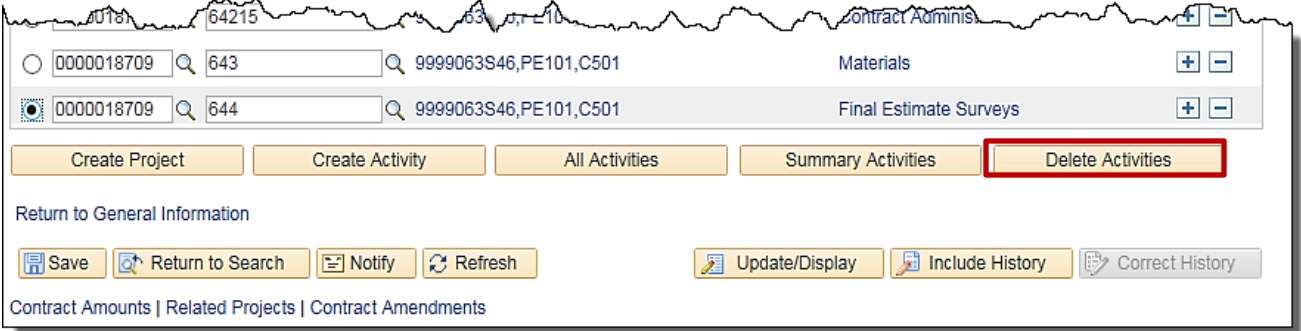
There is an "Amend Contract" button and a search field for "PC Business Unit" with the value 50100.

The "Associated Rates" section has a table with columns: Effective Date, Status, Rate Selection, and Rate Set. The first row shows Effective Date 06/28/2002, Status Inactive (dropdown menu), Rate Selection Rate Set (dropdown menu), and Rate Set. The Status and Rate Selection dropdowns are highlighted with a red box.

The "Associated Projects & Activities" section has a table with columns: *Project, *Activity, Description, and Description. It lists several project activities with their respective descriptions and control buttons (+/-).

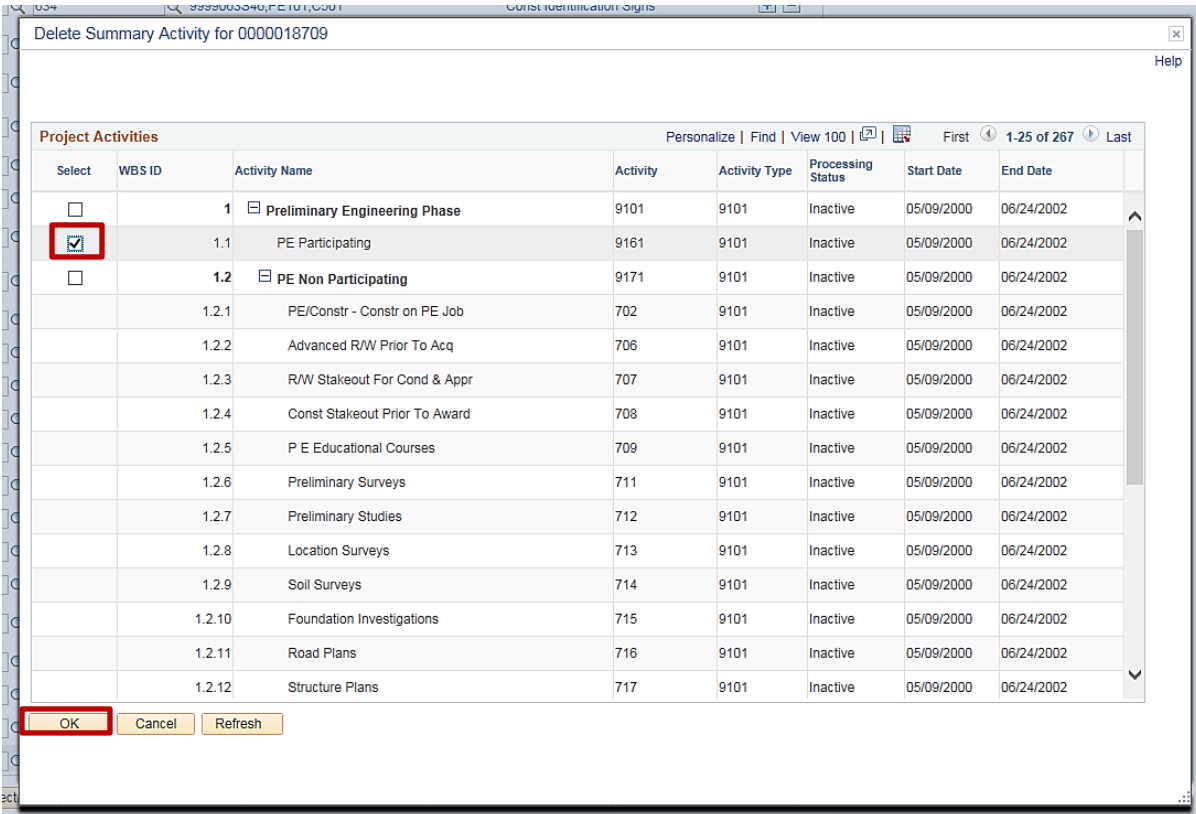
At the bottom, there are buttons for "Create Project", "Create Activity", "All Activities", "Summary Activities", and "Delete Activities". Below these are "Return to General Information" and a row of buttons: **Save** (highlighted with a red box), Return to Search, Notify, Refresh, Update/Display, Include History, and **Correct History** (highlighted with a red box).

14. Click the **Related Projects** tab.
15. Click the **Correct History** button at the bottom of the page.
16. **Associated Rates** section:
 - a. **Status:** Update to **Inactive**
 - b. **Rate Set:** Remove the **Rate Set**
17. Click the **Save** button.



18. Select the radio button next to the **Project** and **Activity** combination that is associated with the contract. Take note of the phase of the activities that are listed.

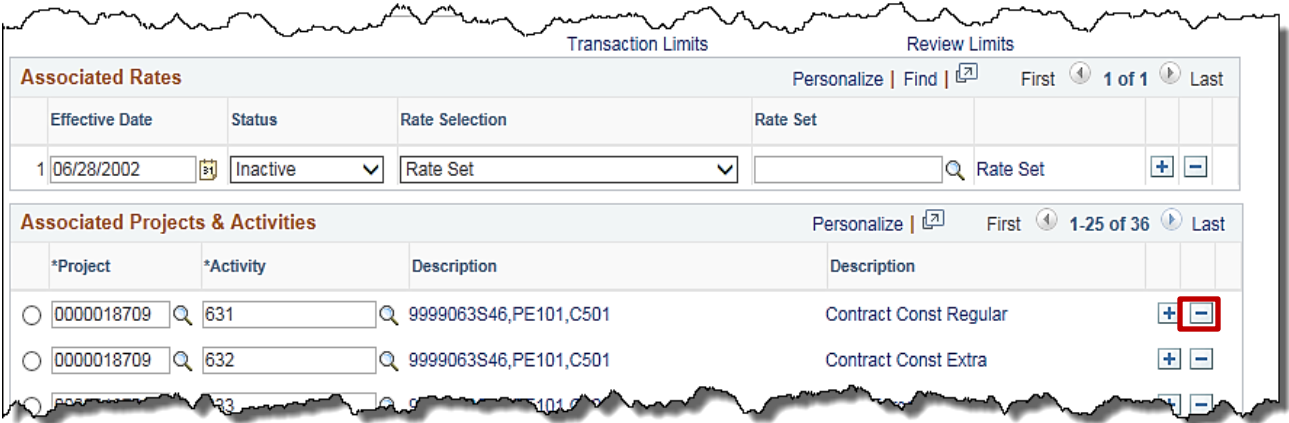
19. Click the **Delete Activities** button.



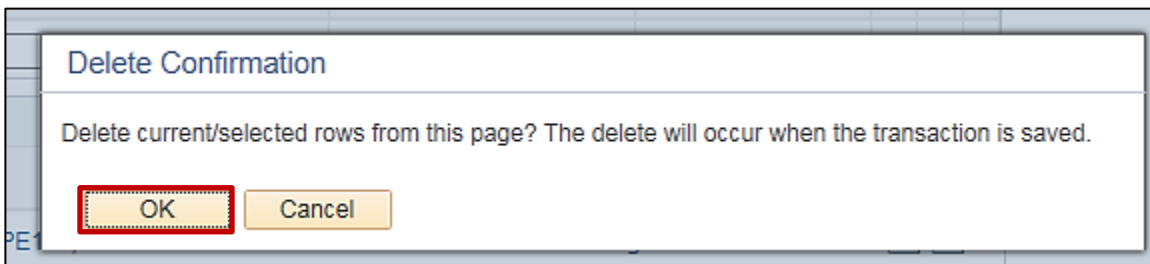
20. The **Delete Summary Activity** pop-up window displays.

21. Select the check box button next to the phase of the participating activities that are to be deleted.

22. Click the **OK** button.



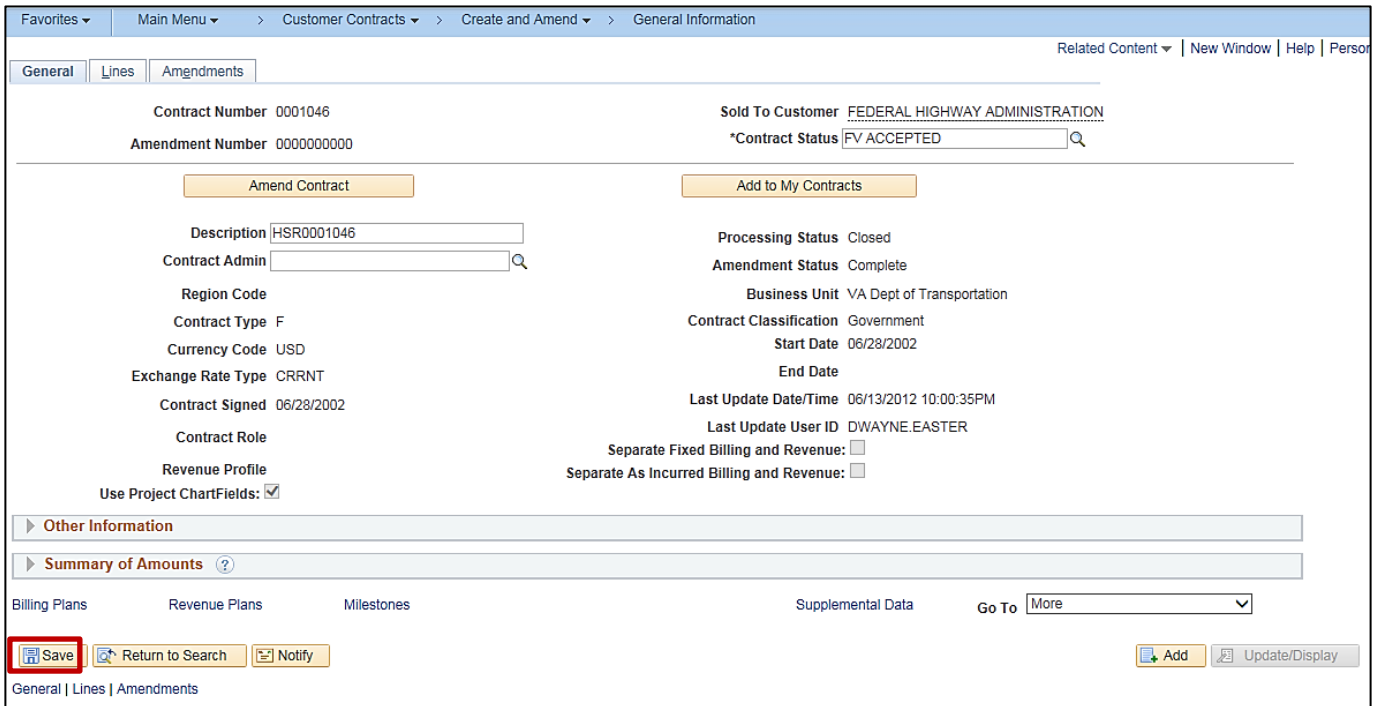
23. The **Contract Terms** page, **Related Projects** tab displays.
24. If there are activities still associated to the contract, click the (-) icon next to each of these activities.



25. A **Delete Confirmation** pop-up message displays. It lets you know the delete will occur when the transaction is saved.
26. Click the **OK** button.

501 PA353: Steps to Update Federal Contract Status

27. Click the **Save** button. The **Contract Terms** page, **Related Projects** tab displays.
28. Select the **General Information** hyperink. The **General Information** page, **Lines** tab displays.
29. Click the **General** tab.
30. Click the lookup icon next to the **Contract Status** field. The **Look Up Contract Status** pop-up window displays.
31. Click on **FV ACCEPTED**. The **General Information** page, **General** tab displays.



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

General | Lines | Amendments

Contract Number 0001046 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION
 Amendment Number 0000000000 *Contract Status FV ACCEPTED

Amend Contract Add to My Contracts

Description HSR0001046 Processing Status Closed
 Contract Admin Amendment Status Complete
 Region Code Business Unit VA Dept of Transportation
 Contract Type F Contract Classification Government
 Currency Code USD Start Date 06/28/2002
 Exchange Rate Type CRRNT End Date
 Contract Signed 06/28/2002 Last Update Date/Time 06/13/2012 10:00:35PM
 Contract Role Last Update User ID DWAYNE.EASTER
 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 Supplemental Data Go To More ▾

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

32. Click the **Save** button.