Create Non-Federal Amount-Based Contract Overview

Amount-based contracts are used to bill a fixed price contract monthly, for varying amounts. An amount-based contract line allows you to bill a fixed amount against a single project/activity combination. Amount-based products allow the same project/activity combination to be associated with more than one contract line.

In order to create an amount-based contract, you must first create an amount-based product. When creating an amount-based product in Cardinal you will first create the **Product Definition**, assign the **Product Group**, and finally associate the new **Product** with a **Distribution Set** and **Distribution Code**. The accounting distribution information on the **Accounting Distribution** page defaults from the **Distribution Sets** and **Distribution Codes**.
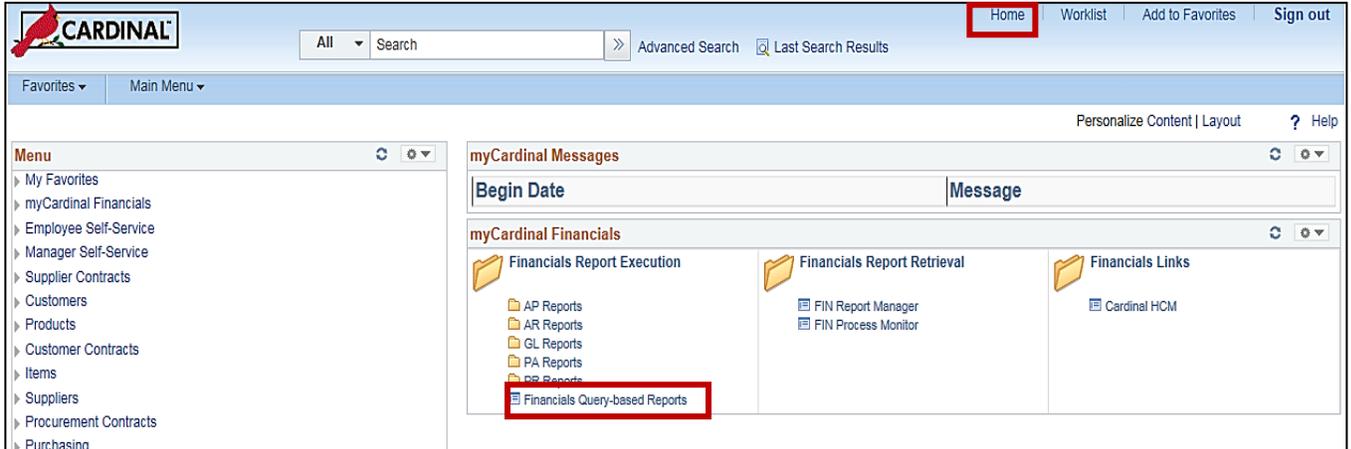
Once the **Product** has been created and associated with a **Revenue/Billing Plan Template** and **Distribution Code** it can be reused on any amount-based contract line.

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Confirm Amount-Based Product

Before creating an Amount-Based Product, search to see if the Amount-Based Product already exists which contains the COA string needed.

1. Run the **Customer Contract Products** query. Access this query by going to the Cardinal **Home** page and clicking the **Financial Based Query-based Reports** link.

2. The **Query Viewer** page displays. In begins with field, enter **V_PA_CUST_CONTRACT_PRODUCTS**.

3. Click the **Search** button.

4. Click the **HTM**L link.

V_PA_CUST_CONTRACT_PRODUCTS - Customer Contract Products

Business Unit 50100

Product ID(% for all) AMT%

Product Group(% for all) %

Account(% for all) %

Dept ID (% for all) %

Fund (% for all) %

View Results

Download results in : Excel SpreadSheet   CSV Text File   XML File   (41 kb)

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	Product	Product Description	Price Type	Product Group	Distribution Code	Distribution Code Desr	Account	Department	Fund	Cost Center	Program	Project Id	Activity
1	AMT_FEDERAL	Federal - Amount Based	AMT	RTE_FED	GRANTGRT12	Federal Grabt - Local Assistan	4020205	10059	04010		603015		
2	AMT_FEDGRT10	Federal Grant - NOVA	AMT	AMT_FED	GRANTGRT10	Federal Grant - NOVA	4020205	19000	04010				
3	AMT_FEDGRT11	Federal Transit Grant-Richmond	AMT	AMT_FED	GRANTGRT11	Federal Transit Grant-Richmond	4020507	14000	04010				
4	AMT_FED_GRT10	Federal Grant-NOVA	AMT	AMT_FED	GRANTGRT10	Federal Grant - NOVA	4020205	19000	04010				
5	AMT_FED_GRT11	Federal Grant-Richmond	AMT	AMT_FED	GRANTGRNT5	Federal Grant - Richmond	4020505	14000	04010				
6	AMT_FED_PASS1	Federal PassThrough CO	AMT	AMT_FED	FEDPASS1	Federal PassThrough CO	609650	10015	04010				
7	AMT_GENER1	Gener - HMO - East River	AMT	AMT_HMOOTH	GENERGEH10	Generic HwyMaintOps East Rv AR	40040001	11099	04100				
8	AMT_GENER2	Gener-HMO-STA-Research Council	AMT	AMT_HMOSTA	GENERGEN15	University of Virgina Generic	4003007	10029	04100	11210010	602002		
9	AMT_GENER3	Gener - HMO - VCTIR	AMT	AMT_HMOOTH	GENERGEN16	Research Council HMO Private	40040001	10029	04100		602002		
10	AMT_GENER4	Gener-CON- Location & Design	AMT	AMT_CONOTH	GENERGEN14	Location & Design CON Private	40040001	10021	04720		514008	0000108401	
11	AMT_MGSE1	Misc-HMO-CCT/OTH-Nova	AMT	AMT_HMOOTH	MG&SEMGS09	Misc - HMO - CCT/OTH-NOVA	4009060	19000	04100	11000010			

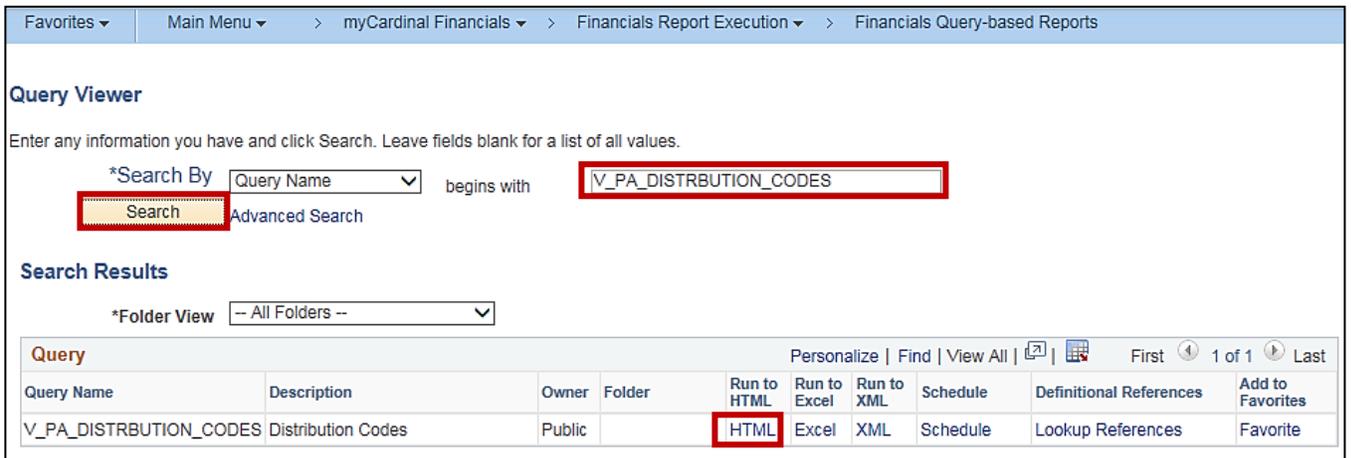5.   The **Query** page displays.

  a.   Enter the run criteria for the query. You should, at a minimum, enter the **Business Unit** and **Product ID** prefix of **AMT%**. If you have the other details (e.g., **Product Group**, **Account**, **Fund**, etc.), they can also be entered.

  b.   Click the **View Results** button**.**

6.   Review the results to see if there is an existing product that has the appropriate **Product Group** and COA string which is needed to record the billing and revenue transactions for the contract.

  a.   If the **Product** exists, go to the **Create an Amount-Based Contract** section of this job aid.

  b.   If the **Product** does not exist, you will need to determine if there is an existing distribution code which contains the appropriate COA string which can be used. Go to the **Create/Confirm Distribution Code** section of this job aid.

Confirm Distribution Code

Before creating a new distribution code, verify whether a code already exists by running the **Distribution Code** query.
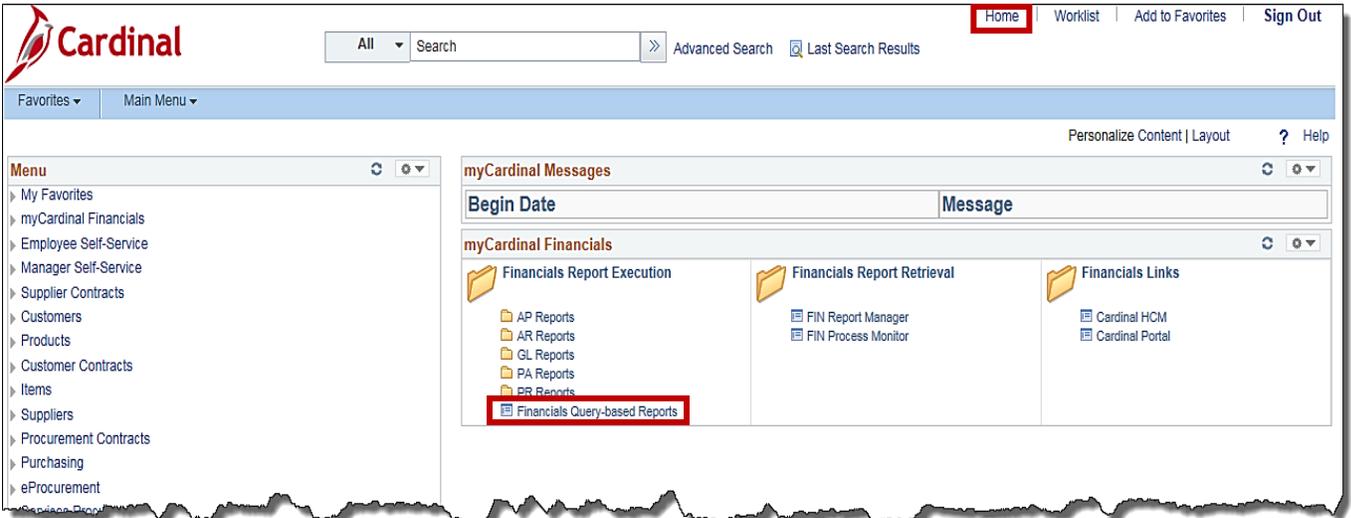
7.   Run the **Distribution Code** query. Access this query by going to the Cardinal **Home** page and clicking the **Financial Based Query-based Reports** link.

8.   The **Query Viewer** page displays. In begins with field, enter **V_PA_DISTRBUTION_CODES**.

9.   Click the **Search** button.

10.   Click the **HTM**L link.

V_PA_DISTRBUTION_CODES - Distribution Codes

SetID 50100
Account (% for all) 4%
Fund (% for all) 04720
Dept Id (% for all) %
Cost Center (% for all) %

[View Results]

Download results in : Excel SpreadSheet CSV Text File XML File (24 kb)

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Row	Distribution Code	Effective Date	Effective Status	Long Description	Short Description	Account	Dept ID	Task	Fund	Cost Center	Program	Project	Activity
1	ADVANCON34	07/01/2016	A	Prepaid - CON - STA	ADVANCON34	4003007	10030		04720				
2	ADVANCON35	07/01/2016	A	Prepaid - CON - OTH	ADVANCON35	4003007	10055		04720				
3	AUDITAUDI2	01/01/1901	A	Audit - CON - OTH	AUDITAUDI2	4009060	10015		04720	12000010			
4	COALSCOALS	01/01/1901	A	Coal Severance - CCT	COALSCOALS	40042013	11000		04720				
5	GENERGECN1	01/01/1901	A	Generic Construction AR	GENERGECN1	4009060	99999		04720	12000010			
6	GENERGEN14	01/02/1901	A	Location & Design CON Private	GENERGEN14	40040001	10021		04720		514008	0000108401	
7	MG&SECON01	01/01/1901	A	Misc - CON - CCT/OTH-Bristol	MG&SECON01	40042011	11000		04720	12000010			
8	MG&SECON02	01/01/1901	A	Misc - CON - CCT/OTH-Salem	MG&SECON02	40042011	12000		04720	12000010			
9	MG&SECON03	01/01/1901	A	Misc - CON - CCT/OTH-Lynchburg	MG&SECON03	40042011	13000		04720	12000010			
10	MG&SECON04	01/01/1901	A	Misc - CON - CCT/OTH-Richmond	MG&SECON04	40042011	14000		04720	12000010			
11	MG&SECON05	01/01/1901	A	Misc - CON - CCT/OTH-Suffolk	MG&SECON05	40042011	15000		04720	12000010			
12	MG&SECON06	01/01/1901	A	Misc - CON - CCT/OTH-Fredsburg	MG&SECON06	40042011	16000		04720	12000010			
13	MG&SECON07	01/01/1901	A	Misc - CON - CCT/OTH-Culpeper	MG&SECON07	40042011	17000		04720	12000010			
14	MG&SECON08	01/01/1901	A	Misc - CON - CCT/OTH-Strunton	MG&SECON08	40042011	18000		04720	12000010			
15	MG&SECON09	01/01/1901	A	Misc - CON - CCT/OTH-NOVA	MG&SECON09	40042011	19000		04720	12000010			
16	MG&SECON30	01/01/1901	A	Misc - CON - OTH - C Office	MG&SECON30	40042011	10015		04720	12000010			
17	MG&SECON31	01/01/1901	A	Misc - CON - OTH - DeCouncil	MG&SECON31	40042011	10030		04720	12000010			

11. The **Query** page displays.

   a. Enter the run criteria for the query. You should, at a minimum, enter the **Set ID** and **Account**. If you have the other details (e.g., **Fund**, **Department** etc.), they can also be entered.

   b. Click the **View Results** button.

12. Review the results to see if there is an existing **Distribution Code** for the COA string which is needed to record the revenue transactions for the contract.

   a. If the Distribution Code exists, go to the **Create a Non-Federal Amount Based Product** section of this job aid.

   b. If the **Distribution Code** does not exist, go to the next step

Create Distribution Code

13. Navigate to the **Distribution Code** page using the following path:

Main Menu > Set Up Financials/Supply Chain > Common Definitions > Distribution Accounting > Distribution Code
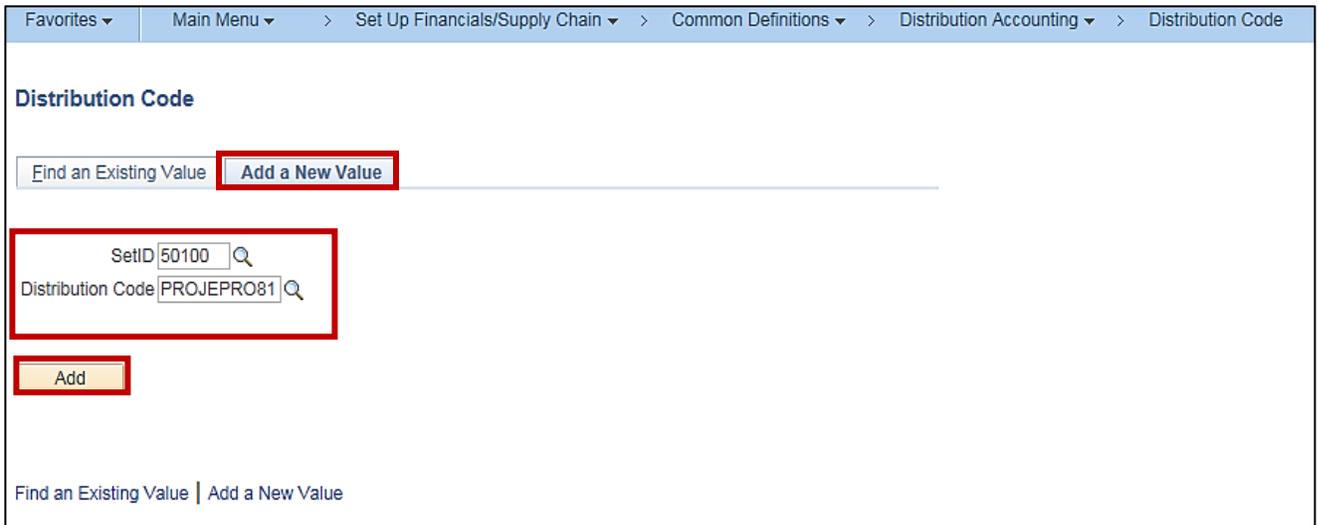
14. On the **Add a New Value** tab:

    a.   **SetID:** Defaults to your agency number (e.g., 50100) and should not be changed.

    b.   **Distribution Code**: Enter the distribution code. The name of the distribution code should contain the corresponding source type and category. For this scenario, **PROJE** (source type) and **PRO79** (category) would be the next available distribution code name since the last one in the system is **PROJEPRO81**.

15. Click the **Add** button.
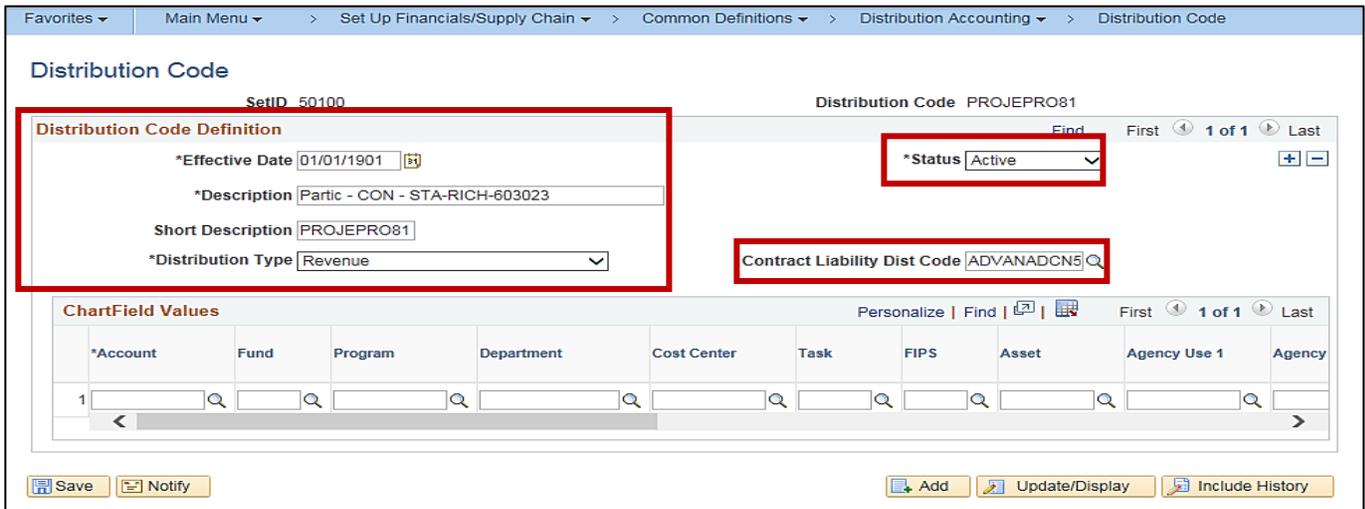
16. The **Distribution Code** page displays. Under the **Distribution Code Definition** section of the page, enter or select the following:

    a. Effective Date: Enter 01/01/1901.

    b. **Description**: Enter the appropriate description.

    c. **Short Description**: Enter the Distribution Code ID.

    d. Distribution Type: Select Revenue.

    e. **Status**: Defaults to **Active** and should not be changed.

    f. **Deferred Distribution Code**: Enter the Distribution Code ID of the appropriate deferred revenue distribution code which should be used to book deferred revenue. Use the **V_PA_DISTRBUTION_CODES** query to determine the available values to enter in this field. Search using the **SETID** for your agency (e.g., **50100**), **Account** and Fund. All Deferred Revenue Distribution Codes start with **ADVAN**.

The **Deferred Distribution Code** is used when creating an **Amount Based Deferred** contract line to default the <mark>Contract Liability</mark> Distribution. The COA values are used to record the deferred revenue. The Deferred Distribution Code values should be associated to all project related distribution codes for **PROJE**, **COAL**, **MG&SECON** and **MG&SEMGS** naming convention.

17. In the **ChartField Values** section of the page, enter or select the following:

    a. **Account**: Enter the account which should be used to book revenue. In most cases, this value will be a revenue account. In some cases, an expenditure account is used to book revenue. For this scenario, you will also need to populate the **Program** as well.

    b. **Fund Code**: Enter the fund code which should be used to book revenue.

    c. **Program**: Only enter the **Program** code if an expenditure account is used instead of a revenue account. The Program value should be the program from the project distribution of the project associated with the contract.

18. Click the **Save** button.

Create an Amount-Based Product

19. Navigate to the **Product Definition** page using the following path:

Main Menu > Products > Identify Product Details > Definition
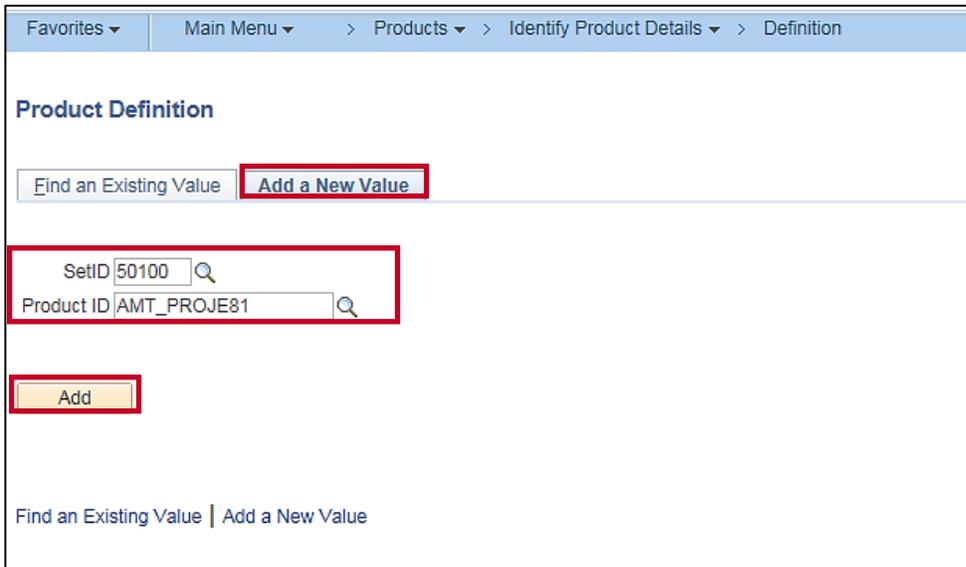
20. Click the **Add a New Value** tab.

21. The **SetID** and **Product ID** are populated from the **Search Criteria** you entered on the **Find an Existing Value** tab. If these fields are not populated, enter them:

22. SetID: 50100

23. Enter the new **Product ID**.

24. Click the **Add** button. The **Definition** page, **Definition** tab displays.

25. **Product Use**: **Contracts Only**. Do not change.

26. **Description**: Enter the **Distribution Code** as the description.

27. **Physical Nature**: **Goods**

28. Click the **Save** button.

29. Click the **Contracts Options** tab.

30. **Price Type**: **Amount**

31. **Recognition Method**: **Milestone**

32. In the **Templates** section, select the following:

33. **Revenue Plan**: **MILESTONE**

34. **Billing Plan**: **MILESTONE**

35. **Bill Plan Detail Template ID**: Select the appropriate value (e.g., **PROJE_CCT** is **Non-Federal Project – CCT**). The template selected defaults some of the contract billing information, such as **Bill Source**, **Bill Identifier**, and **Bill Cycle Identifier**.

36. Click the **Save** button.
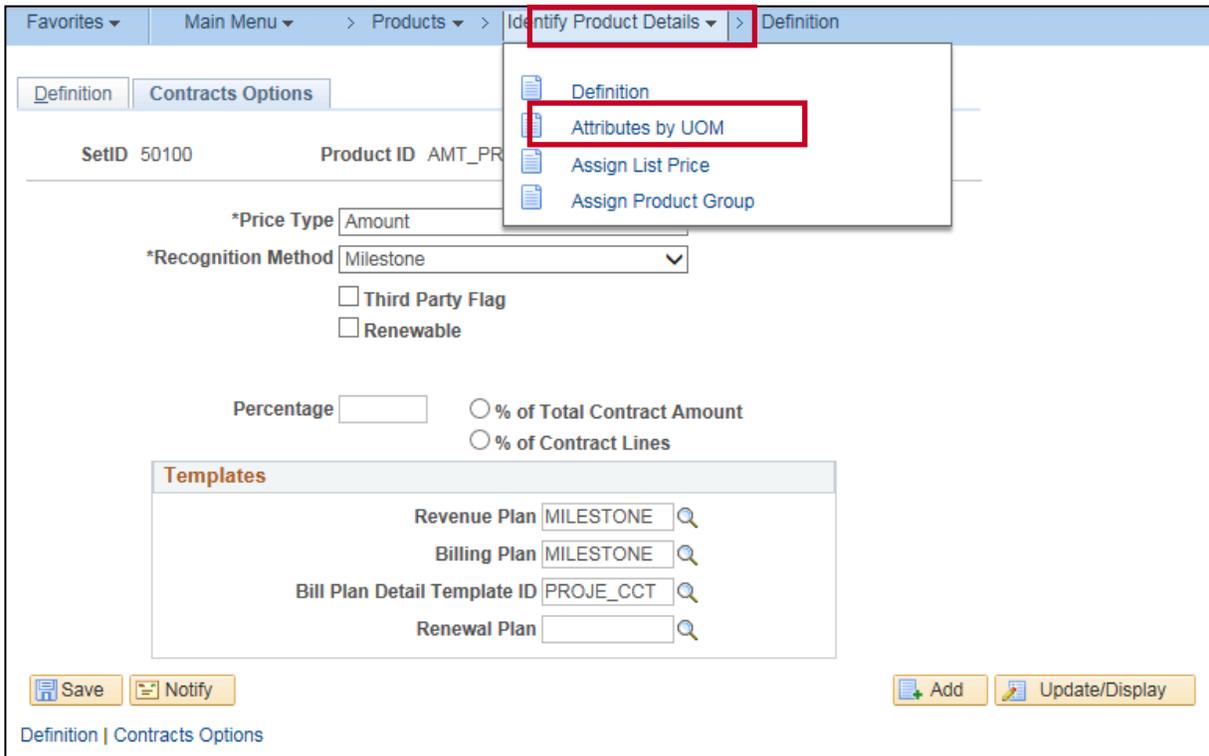
37. From the navigation path above the page, Click **Identify Product Details** in the navigation path bread crumbs.

38. Select the **Attributes by UOM** menu option. The **Attributes by UOM** page displays.
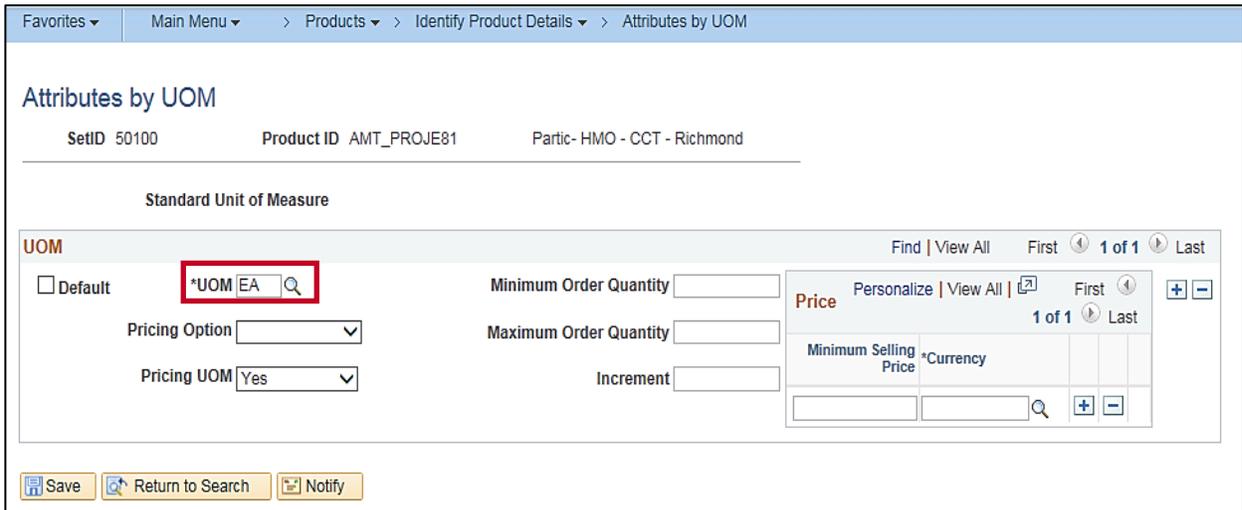
39. **UOM**: Select a Unit of Measure (e.g., **EA**).

40. Click the **Save** button.
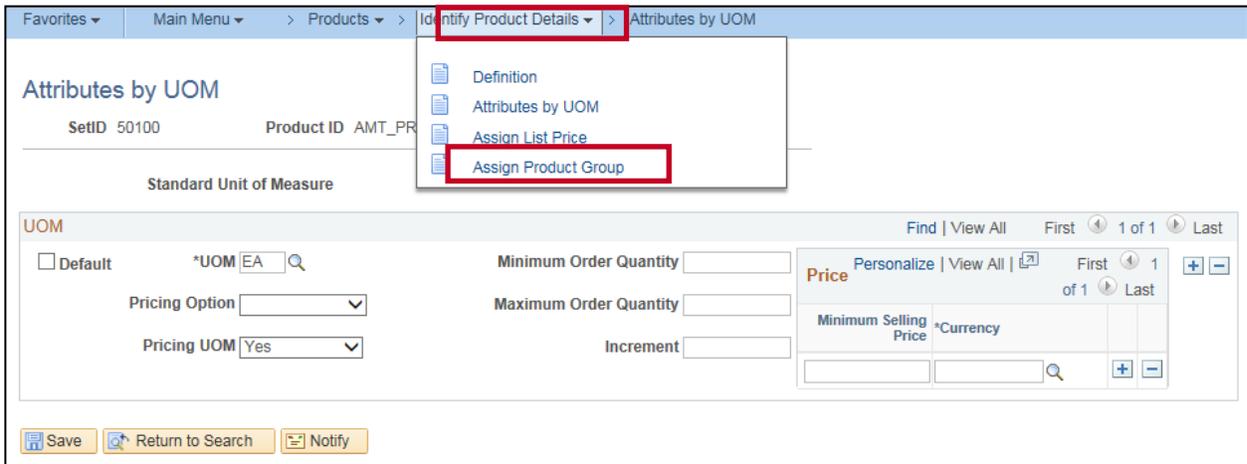
41. From the navigation path above the page, click **Identify Product Details** in the navigation path bread crumbs.

42. Select the **Assign Product Group** menu option. The **Assign Product Group** page displays.
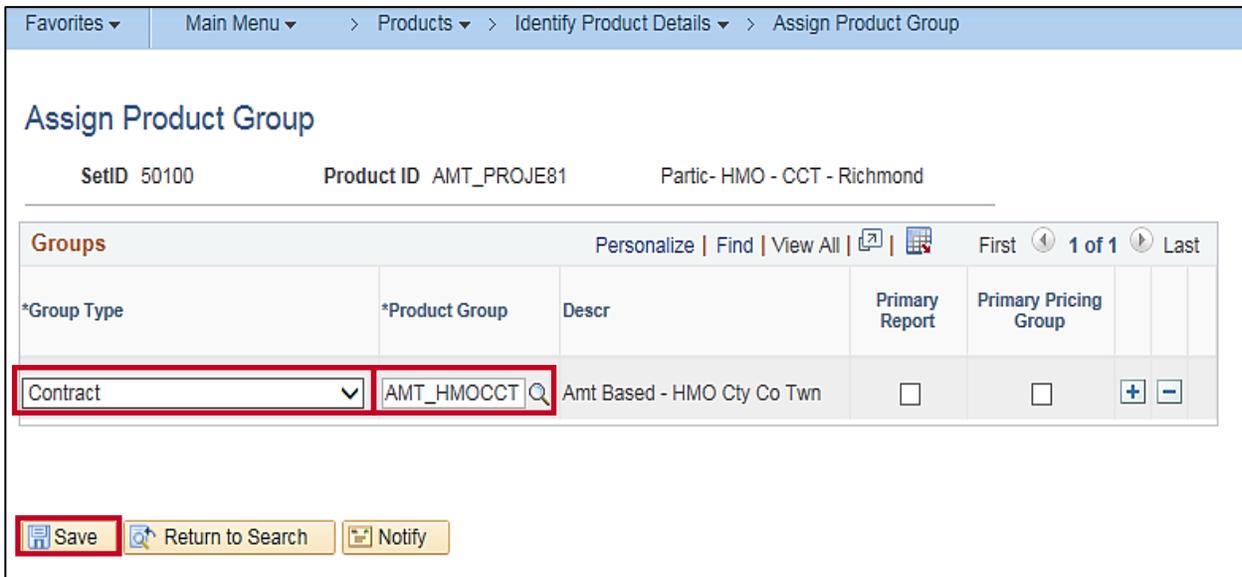
43. **Group Type**: **Contract**

44. **Product Group**: Select the appropriate group. This value determines which **Product Group** the **Product** will be found in when searching for the **Product** on the contract. In this scenario, it is **AMT_HMOCCT** (Contract Type_Fund plus Customer type).

45. Click the **Save** button.

Define the Distribution Set

46. Access the **Distribution Sets** page, using the following path:

Main Menu > Set Up Financials/Supply Chain > Common Definitions > Distribution Accounting > Distribution Sets

| Favorites ▾ | Main Menu ▾ | > | Set Up Financials/Supply Chain ▾ | > | Common Definitions ▾ | > | Distribution Accounting ▾ | > | Distribution Sets |
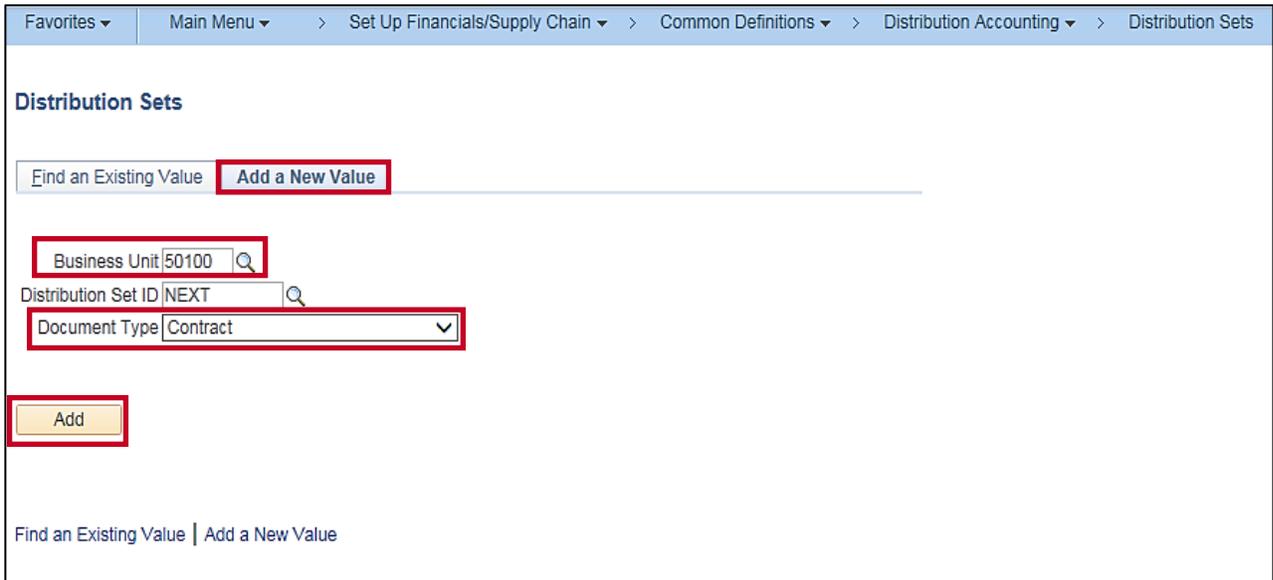
Distribution Sets

Find an Existing Value | **Add a New Value**

Business Unit 50100 🔍
Distribution Set ID NEXT 🔍
Document Type Contract ▾

Add

Find an Existing Value | Add a New Value

47. Click the **Add a New Value** tab.

48. **Business Unit**: **50100**

49. **Distribution Set**: Defaults to **NEXT**. Do not change.

50. **Document Type**: **Contract**

51. Click the **Add** button.

52. The **Distribution Sets** page, **Distribution Sets** tab displays.

53. Enter the **Effective Date**. The **Effective Date** must be set to **12/05/2011**.

54. **Product ID**: Select the **Product ID** you previously created (e.g., **AMT_PROJE91**).

55. **Status**: **Active**

56. Click the **Distribution Percentages** tab.

57. **Revenue Code**: Select **a Revenue Code** (**Distribution Code**) that is appropriate for the **Product** created. General Ledger ChartFields are linked to the **Revenue Code** and default on the revenue line of the contract.

58. Click the **Save** button.

Create a Non-Federal Amount-Based Contract

The process to create a customer contract for a non-federal amount-based contract involves the following steps:

- **Enter Contract General Information**: When you create the contract header you define information for the entire contract; this may include the contract signed date, contract administrator, and contract type.

- **Enter Contract Line Information**: Contracts may have more than one contract line. However, most amount-based contracts will only have one. At this level, a product is chosen that defines the contract as amount-based. The **Revenue** and **Billing Plans** are defined at the line level.

- **Enter Contract Terms**: **Projects** and **Activities** are linked to a contract line on the **Related Projects** page. Unlike rate-based contracts, the same **Project/Activity** combination can be linked to more than one contract line for an amount-based contract.

- **Update the Accounting Distribution**: The **Project** and **Department** values must be defined on the accounting distribution.

- **Allocate Amounts**: After you define your amount-based contract and add the **Products** that make up your contract, the next step is to allocate the contract's **Fixed Billing** amount. A contract cannot be set to an **Active Processing Status** until the **Fixed Billing** has been allocated and the **Allocation** option has been set to **Complete**.

- **Activate the Contract**: After you create the contract, add **Product**(s), set the limits, and link the **Projects** and **Activities**, the contract is ready to be set to **Active**. Activating a contract indicates that all pertinent data for the contract is in Cardinal. When changing the **Contract Status**, you can only move forward. Once the contract is set to **Active**, it cannot be set back to **Pending** and once **Closed**; it cannot be set to **Active**.

Enter Contract General Information

59. To create a contract, access the **General Information** page using the following path:

Main Menu > Customer Contracts > Create and Amend > General Information
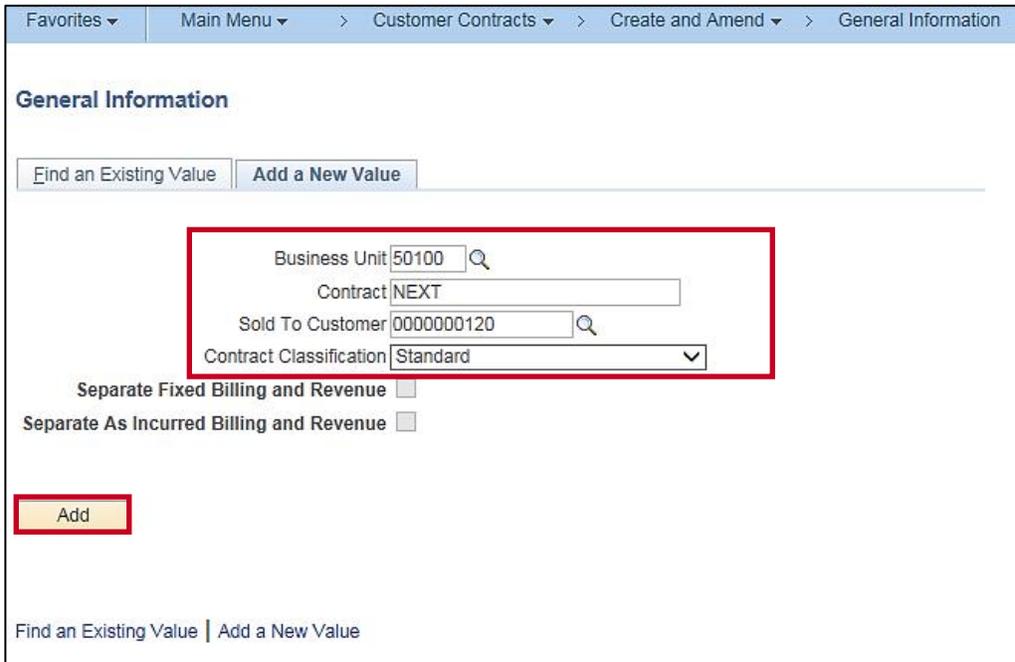
60. Click the **Add a new Value** tab.

61. **Business Unit**: **50100** for VDOT

62. **Contract**: Defaults to **NEXT**. Do not change.

63. Enter the **Sold To Customer** using the look up icon.
     If the customer is not listed in the look up, this means the customer has not been created, or was not created correctly. Consult the Accounts Receivable group to have the customer record updated.

64. **Contract Classification**: **Standard**. Do not change.

65. The two check box fields, **Separate Fixed Billing and Revenue** and **Separate As Incurred Billing and Revenue**, are not used.

66. Click the **Add** button.

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

68. **Description**: Enter a short detailed description about the contract. The description can be a maximum of 35 characters.

69. **Contract Type**: Select the appropriate value:

    A: Letter of Authorization

    F: Federal

    G: Grant

    J: Federal Grant

    L: Local

    O: Other

    R: Resolution

70. **Contract Signed**: Defaults to the current date. Update with the agreement date. If there is no agreement date, you may use the date the contract is eligible to begin billing. This date will also be the default date on the accounting distribution.

71. Click the arrow next to the **Other Information** section to expand the section:

72. **Legal Entity**: **STATE**

73. **Federal Region Code**: **03** (FHWA). Do not change.

74. Click the arrow next to the **Summary of Amounts** section to expand the section:

  a. **Fixed Billing**: Enter the total amount to bill the customer.

  b. Click the **Save** button. The **Contract Number** displays.

75. Click the **Lines** tab.

Enter Contract Line Information

76. Click the **Add Contract Lines** button.

77. The **General Information** – **Add Contract Lines** page displays.

78. To search for non-federal amount-based products:

    a. **Product Group**: Select a product (e.g., **AMT_CONCCT** (Amt Based - Constr Cty Co Twn)).

    b. **Price Type**: **Amount**

79. Click the **Search** button. Your search results populate on the same page below the search criteria.

80. Select the check box next to the **Product** you want to add to the contract.

81. **Start Date**: Enter a **Start Date** for the contract line. The value that you enter appears on the **Contract - Lines** page.

82. **End Date**: Leave blank

83. **Quantity**: This value is automatically populated. Do not change.

84. **Create Plans from Template** and **Combine Like Templates**: Check boxes default as selected. Do not change. These templates create the predefined **Billing Plans** and **Revenue Plans** for the product(s) selected.

85. Click the **Add Contract Lines** button.
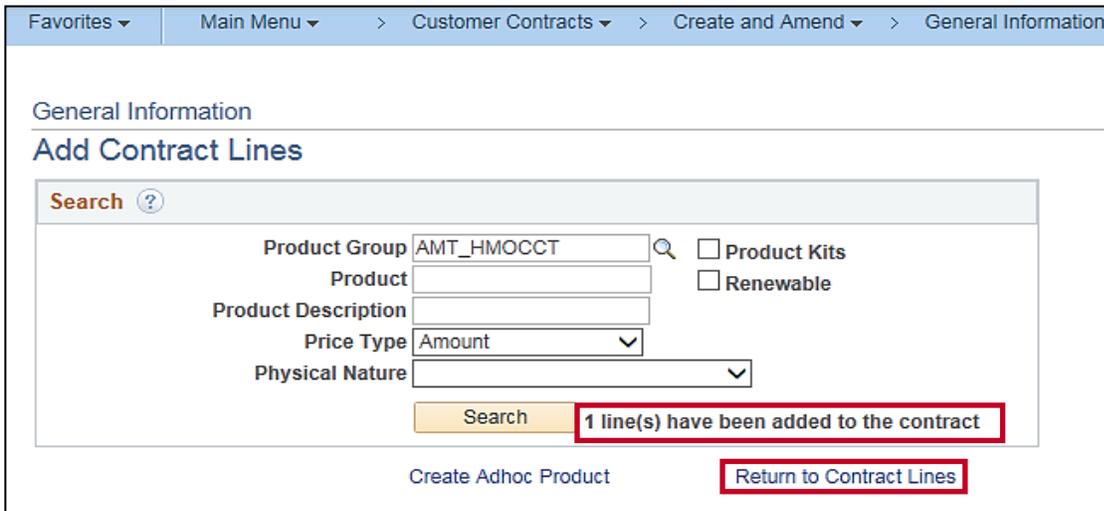
86. The **General Information** - **Add Contract Lines** page displays.

87. A message displays indicating **1 line(s) have been added to the contract**.

88. Click the **Return to Contract Lines** hyperlink to continue processing the contract.
The **General Information** page, **Lines** tab displays and the product selected appears as one of the contract lines.

Enter Contract Terms and Related Projects

89. Click the **Save** button.

90. The **Contract Number** field value changes from **NEXT** and assigns a contract number.

91. Click the **Detail** tab.

92. Click the **Contract Terms** hyperlink. The **Contract Terms** page, **Related Projects** tab displays.
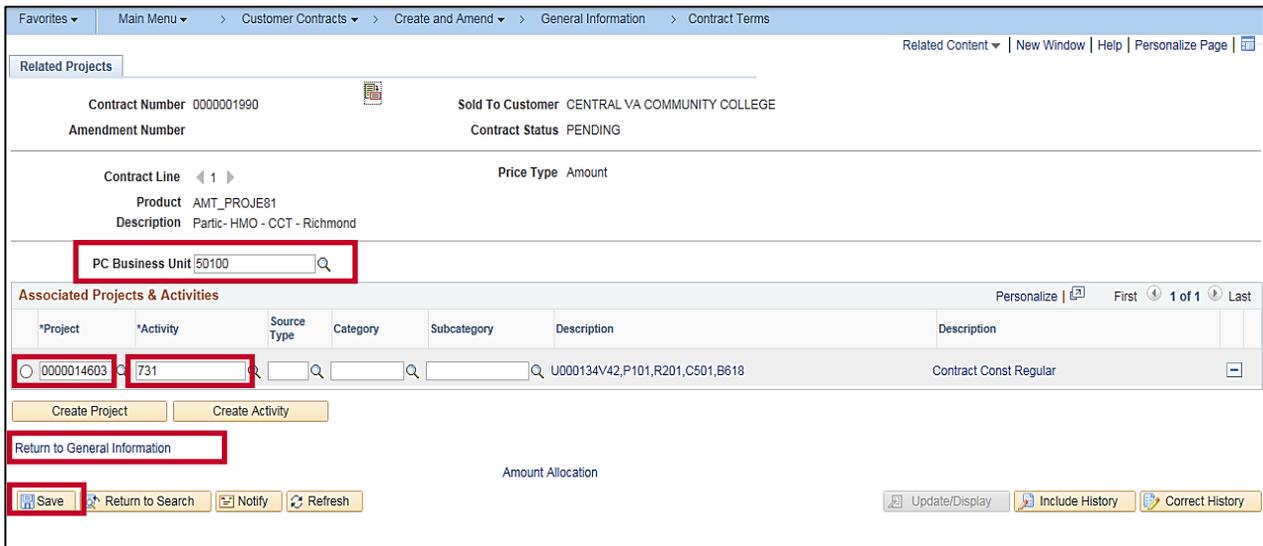
93. The **Related Projects** tab displays.

94. Enter the **PC Business Unit**: **50100** for VDOT

95. Determine which **Project/Activity** combination is to be billed under the contract line. The first non-participating activity within the phase being billed should be selected.

96. In the **Associated Projects & Activities** section, enter your Project ID in the **Project** field.

97. Enter or select the **Activity**.

98. Click the **Save** button.

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

Update the Accounting Distribution

With amount-based contracts the accounting distribution line(s) default based on the **Product** you selected. However, you need to add the **Project ID** on each accounting distribution line. Enter the same **Project ID** you selected when linking the **Project/Activity** for the contract line. Additionally, the **Fund** and **Department** <u>must</u> be updated on the **Contract Asset** distribution line to match the **Fund** and **Department** on the **Revenue** distribution line.

100. The **General Information** page, **Lines** tab displays.

101. In the **Contract Lines** section, Click the **Detail** tab.

102. Click the **Distribution** hyperlink under the **Accounting** column for the contract line you need to update. The **Accounting Distribution** page displays.

103. Click the **Correct History** button.

104. Update the **Fund** and **Department** on the **Contract Asset** distribution line to the value displayed on the **Revenue** distribution line.

105. **Project**: Scroll to the right.

106. Enter the following values:

    a. **PC Business Unit**: enter **50100**

    b. **Project**: enter the **Project** value in the **Project** field. The **Project ID** must be the same **Project ID** you selected when linking the **Project/Activity** to the contract line.

    c. **Activity**: enter or select the Activity.

       Note: The activity value must be **Active** for the distribution to save.

107. Scroll to the end of each line to verify that the **Valid** checkbox is checked.

108. Click the **Save** button.

109. A message displays indicating **Contract Asset accounting distribution has been changed**.

110. Click the **OK** button.

111. Click the **Return to General Information** hyperink.

Allocate Amounts

112. The **Contract Lines** page displays. Click **General** tab.

Click the **Amount Allocation** hyperlink at the bottom of the page.

113. The **Amount Allocation** page, **Billing Allocation** tab displays.

114. In the **Contract Billing** section, enter the billing limit in the **Total Billing** field.

115. **Fixed Billing**: Is prepopulated with the **Fixed Billing** amount you entered on the **General Information** page.

116. In the **Contract Line Pricing** section, enter the **Fixed Billing** amount in the **Billing Amount** field. The **Billing Amount** and **Fixed Billing** fields must match.

117. Click the **Recalculate** button. The **Allocation** field, in the **Fixed Billing** section, updates from **Incomplete** to **Complete**. The **Unallocated Fixed Billing** and **Unallocated Billing** fields are now $0.

118. Click the **Save** button.

119. Click the **Return to General Information** hyperlink. The **General Information** page displays.

120. Click the **Lines** tab.

121. Click the **Contract Lines** section, **Detail** tab.

122. Click the **Billing Plan** status hyperlink (Pending). The **Define Billing Plan** page, **Billing Plan General** tab displays.

123. The **Define Billing Plan** page, **Billing Plan General** tab displays.

124. Click the **Events** tab.

Amount-based contracts **Billing** and **Revenue Plans** are based on meeting specific goals identified in the contract. In Cardinal, goals are identified as **Events**. You can add multiple events to the contract on the **Events** tab. The sum of the **Event** lines cannot exceed the contract's **Fixed Billing** amount. **The Fixed Billing** amount display in the **Amount Detail** section, **Amount** field.

125. This tab allows you to define billing **Events** for the **Billing Plan**. In the **Define Events** section, select the **Amount** radio button.

126. In the **Event Detail** section:

   a. The sum of the **Event** lines cannot exceed the contract's **Fixed Billing** amount. The **Fixed Billing** amount displays in the **Amount Detail** section, **Total Amount** field.

   b. If the **Fixed Billing** needs to be billed in multiple installments, use the (**+**) button to add additional **Events**. The same number of **Events** should also be added to the **Revenue Plan**.

   c. For **Event** line 1 and any additional **Event** lines you add, update as follows:

      i. **Event Type**: defaults to **Date**. Do not change.

      ii. Event Status: Change from Ready to Pending.

      iii. **Event Date**: Represents the billing date as defined by the contract. Defaults to the current date. You can change the date.

      iv. **Amount**: Enter the amount for this billing event (e.g., **5,000.00**).

i. **Event Status**: Change all events from **Pending** to **Ready**, except the **Event** with **$0 Amount**, it should remain **Pending**.

127. Click the **Save** button. Saving updates the **Remaining Amount** to include the new **Event**(s). If there is an amount remaining, an error message will appear when the contract is activated indicating that the **Total Amount** must equal the sum of the **Event Amounts**.
The **Event Amount(s)** must be updated or an additional **Event** must be added so that the remaining amount updates to $0.

128. Make a note of the **Event** line numbers, **Event Dates**, and **Event Amounts** you entered so you can enter those same dates and amounts on the **Revenue Plan**.

129. Click the **Return to General Information** hyperlink. The General Information page displays.

130. Click the **Lines** tab.

131. Click the **Detail** tab.

132. Click the **Revenue Plan** status hyperlink. The **Define Revenue Plan** page, **Revenue Plan** tab displays.

133. The **Define Revenue Plan** page, **Revenue Plan** tab displays.

The **Revenue Plan** contains a list of **Events** defining when revenue is recognized for each contract line assigned to that **Revenue Plan**. Revenue is recognized when amounts are billed, so the **Billing Plan** and **Revenue Plan** must match. Access the **Revenue Plan** to enter the same information that you entered on the **Billing Plan**.

134. In the **Define Events By** section, select the **Amount** radio button.

135. In the **Event Detail** section:

a. If multiple events were entered on the **Billing Plan**, enter the same number of **Revenue Events**, with identical **Event** line numbers, **Event (Accounting) Dates**, and **Event Amounts**. Use the (**+**) button to add additional **Events**.

b. **Event Type**: defaults to **Date**. Do not change.

c. **Event Status**: Change all events from **Pending** to **Ready**, except the **Event** with **$0 Amount**, it should remain Pending.

d. **Accounting Date**: Enter the **Event Date** as entered on **Event Line 1** of the **Billing Plan**. If multiple events were entered on the **Billing Plan**, there should be the same number of **Revenue Events** with identical **Event** line numbers, **Event (Accounting) Dates**, and **Event Amounts**.

e. **Amount**: Enter the same amount entered on **Event** line **1** of the **Billing Plan** (e.g., **5,000.00**). If multiple events were entered on the **Billing Plan**, enter the same number of **Revenue Plan Events**, with identical **Event** line numbers, **Event (Accounting) Dates**, and **Event Amounts**.

f. **Event Status**: Change all events from **Pending** to **Ready**, except the **Event** with **$0 Amount**, it should remain **Pending**.

136. Click the **Save** button. Saving updates the **Remaining Amount** to include the new **Event**(s). If there is an amount remaining, an error message will appear when the contract is activated indicating that the **Total Amount** must equal the sum of the **Event Amounts**. The **Event Amount**(s) must be updated or an additional **Event** must be added so that the remaining amount updates to **$0**.

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

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

Activate the Contract

After you create the contract, add contract line(s), set **Transaction Limits**, define the **Rate Set**, and link the projects and activities, you can set the **Contract Status** to **Active**. Activating a contract indicates that all data for the contract has been entered into Cardinal. Activating a customer contract requires the same steps for every contract, regardless of type. This task is performed by the reviewer.

139. From the **General Information** page, **General** tab, use the arrow next to the **Summary of Amounts** section to expand the section.

140. The messages ***Fixed Billing Allocation Complete** and ***Fixed Revenue Allocation Complete** appear under the **Billing Amounts** and **Revenue Amounts** sections. These messages will disappear when the **Contract Status** is updated to **Active**.

141. At the top of the page, change the **Contract Status** from **Pending** to **Active**.

142. Click the **Save** button.