Creating Non-Federal Recurring Contracts Overview

To create a recurring contract, a recurring product must be created first. Define the start date and schedule and each time the plan is eligible for billing. The system generates the appropriate Invoice Lines and sends them to the Billing module along with the accounting distribution for processing.

There are three steps that must be followed to create a recurring product which are:
- A Revenue/Bill Plan template must be created for the number of billings (ex: 3 months, 6 months)
- A Product must be created
- A Distribution set must be created

Note: If a new recurring Product needs to be created, it is recommended to submit a Help Desk ticket (vccc@vita.virginia.gov) with "Cardinal Project Accounting (PA)" in the subject line. The Cardinal Post Production Support (PPS) PA team will help ensure that the product is created correctly. If the product is not set up correctly, it will have downstream impacts to the contract, billing, and GL distribution and require a Help Desk ticket to correct the errors.

When creating a Recurring Product in Cardinal:
- Create the Recurring Revenue/Bill Plan (if needed). If the template already exists, skip this step
- Create the Product Definition
- Attribute the Product by Unit of Measure
- Assign the List Price
- Assign the Product Group
- Associate the new Product with a Distribution set and Distribution Code

Creating Non-Federal Recurring contracts involves the following steps:
- Creating Contract Header - Create the Contract Header by defining information for the entire Contract. This may include the Contract signed date, the Contract Administrator, and the Contract Type
- Creating Contract Line(s) - Contracts may have more than one Contract Line. However, most recurring Contracts will only have one. At this level, a Product is chosen that defines the Contract as recurring
- Associating Project and Activity – A Project and Activity are associated to the Contract Line on the **Related Projects** page
- Updating the Distribution - The Project and Activity must be defined on the distribution
- Reviewing the Billing Plan - The billing plan is created automatically and can be viewed. Users can also stop the recurring billing before the scheduled end date by changing the end date and saving it on this page
- Activating the Contract - Activating a Contract indicates that all data for the Contract is in Cardinal and that billing will commence

Unlike rate-based Contracts, the same Project - Activity combination can be associated with more than one Contract Line for a recurring Contract. After the Contract is created, add Product(s), set the limits, and associate the Project Activity(s). The Contract is then ready to be set to "Active".

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History

Revision Date	Summary of Changes
7/1/2025	Baseline.
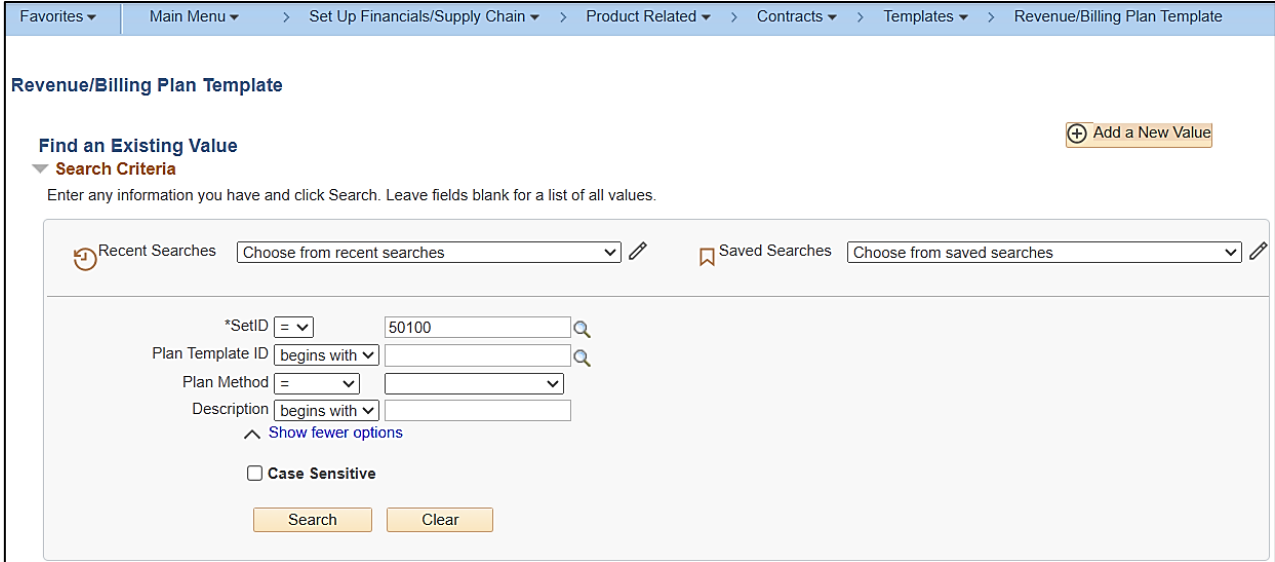
![Cardinal logo]

Creating a Recurring Revenue/Bill Plan Template

Before performing this process, validate that a Revenue/Bill Plan template has not been created for the number of months that the Contract will need to produce a bill.

Step	Action
1.	Navigate to the **Revenue/Billing Plan Template** page using the following path: **Main Menu > Set Up Financials/Supply Chain > Product Related > Contracts > Templates > Revenue/Billing Plan Template**
	The **Revenue/Billing Plan Template Find an Existing Value Search** page displays. ![Screenshot of the Revenue/Billing Plan Template Find an Existing Value page showing search criteria fields including SetID 50100, Plan Template ID, Plan Method, Description, and Search/Clear buttons]
ℹ️	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	The **SetID** field defaults based on the Agency. Click the **Plan Template ID Look Up** icon and select "REC". ![Screenshot showing SetID field with 50100 and Plan Template ID field with REC entered]
3.	Click the **Search** button. ![Screenshot showing Search and Clear buttons with Search highlighted]
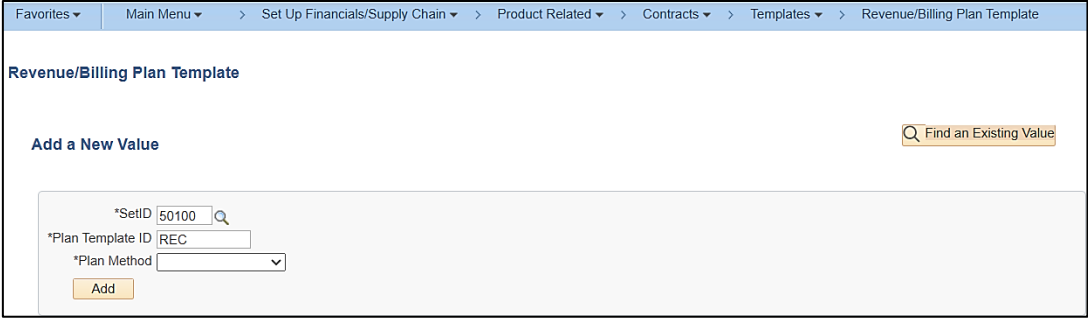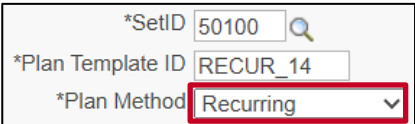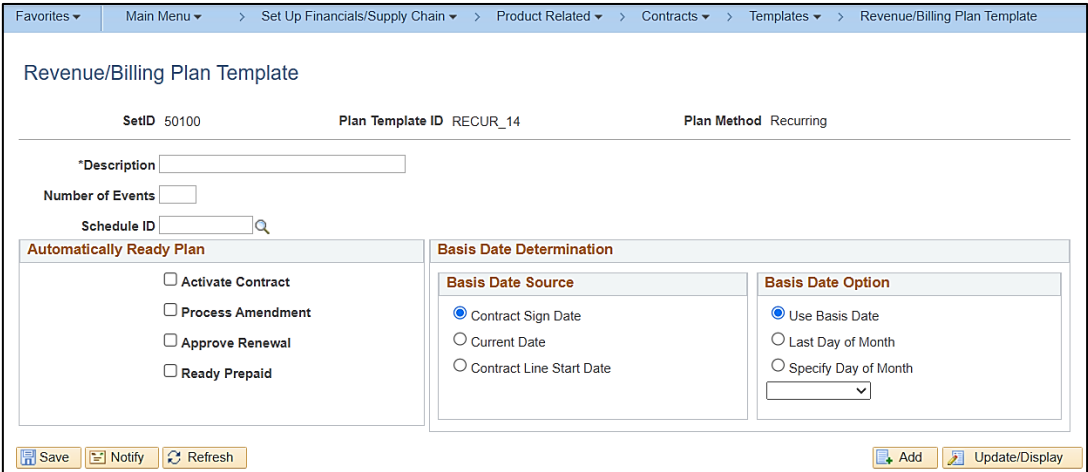
Step	Action
	The Search Results display at the bottom of the page.

<div style="border:1px solid #ccc">

Search	Clear	🔖 Save Search

🔽 **Search Results**
38 results - SetID "50100"   Plan Template ID "REC"

			View All |	First ◀ **1-10 of 38** ▶ Last
SetID	**Plan Template ID**	**Plan Method**	**Description**	
50100	RECUR_1	Recurring	Recurring - Monthly - 1	›
50100	RECUR_10	Recurring	Recurring - Monthly - 10	›
50100	RECUR_11	Recurring	Recurring - Monthly - 11	›
50100	RECUR_12	Recurring	Recurring - Monthly - 12	›
50100	RECUR_120	Recurring	Recurring - Monthly - 120	›
50100	RECUR_12Q	Recurring	Recurring - Quarterly 12	›
50100	RECUR_15	Recurring	Recurring - Monthly - 15	›
50100	RECUR_16	Recurring	Recurring - Monthly - 16	›
50100	RECUR_17	Recurring	Recurring - Monthly - 17	›
50100	RECUR_18	Recurring	Recurring - Monthly - 18	›

</div>

ℹ️	If a template is not found for the applicable number of months, then the user must create a new one (starting with Step 4).
4.	Click the **Add a New Value** button. ⊕ Add a New Value

Step	Action
	The **Revenue/Billing Plan Template Add a New Value** page displays.
5.	Enter the **Plan Template ID** using **"RECUR_"** and the number of bills (Months). If quarterly, add the letter "Q" behind the number of bills (i.e., "RECUR_14Q").
6.	Click the **Plan Method** dropdown button and select "Recurring".
7.	Click the **Add** button.
	The **Revenue/Billing Plan Template** page displays.
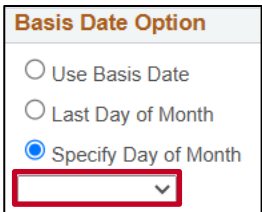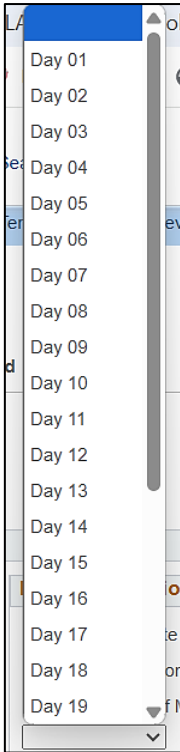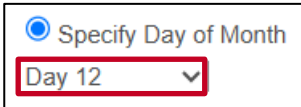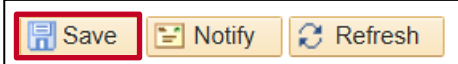
Step	Action
8.	Enter a description for the template in the **Description** field. *Description `Recurring Monthly - 14`
9.	Enter the number of Months or Quarters in the **Number of Events** field. Number of Events `14`
10.	Click the **Schedule ID Look Up** icon and select the applicable Schedule ID. Schedule ID `MONTHLY12` 🔍 Example: "MONTHLY12" means the 12th day of each Month.
11.	Select the **Activate Contract** and **Process Amendment** checkbox options in the **Automatically Ready Plan** section. **Automatically Ready Plan** ☑ Activate Contract ☑ Process Amendment ☐ Approve Renewal ☐ Ready Prepaid
12.	Select the **Contract Line Start Date** radio button option as the Basis Date Source and select the **Specify Day of Month** radio button option as the Basis Date Option in the **Basis Date Determination** section. **Basis Date Determination** **Basis Date Source** ○ Contract Sign Date ○ Current Date ◉ Contract Line Start Date **Basis Date Option** ○ Use Basis Date ○ Last Day of Month ◉ Specify Day of Month ⌄
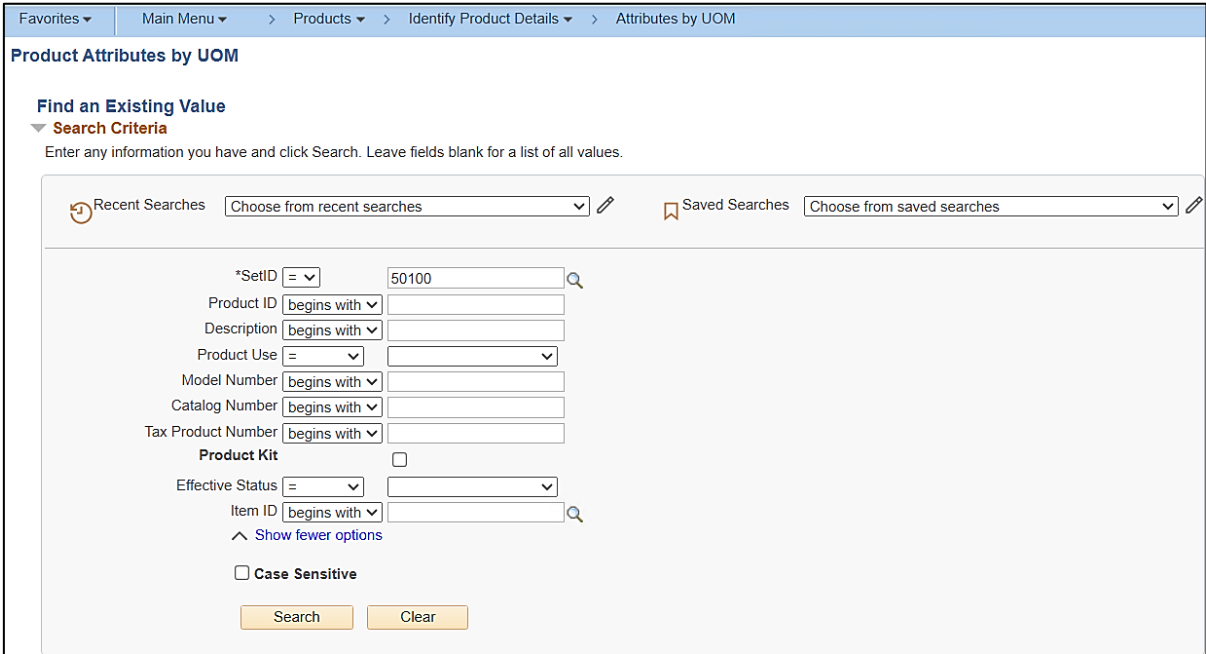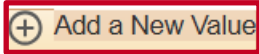
Step	Action
13.	Click the **Specify Day of Month** dropdown button. **Basis Date Option** ○ Use Basis Date ○ Last Day of Month ● Specify Day of Month [▼]
	The **Specify Day of Month** dropdown menu list displays. Day 01 Day 02 Day 03 Day 04 Day 05 Day 06 Day 07 Day 08 Day 09 Day 10 Day 11 Day 12 Day 13 Day 14 Day 15 Day 16 Day 17 Day 18 Day 19
14.	Select the day of the Month by clicking the corresponding list item. The day of the Month selected should be consistent with the Schedule ID previously selected. ● Specify Day of Month Day 12 ▼
15.	Click the **Save** button. Save Notify Refresh
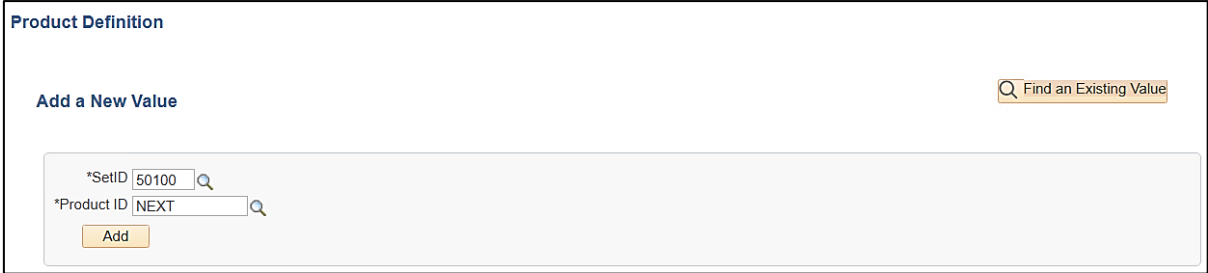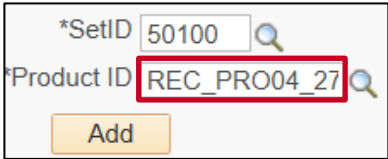
Creating a Recurring Product

Step	Action
1.	Navigate to the **Product Definition** page using the following path: **Main Menu > Products > Identify Product Details > Definition**
	The **Product Definition Find an Existing Value Search** page displays.
ℹ️	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Click the **Add a New Value** button.
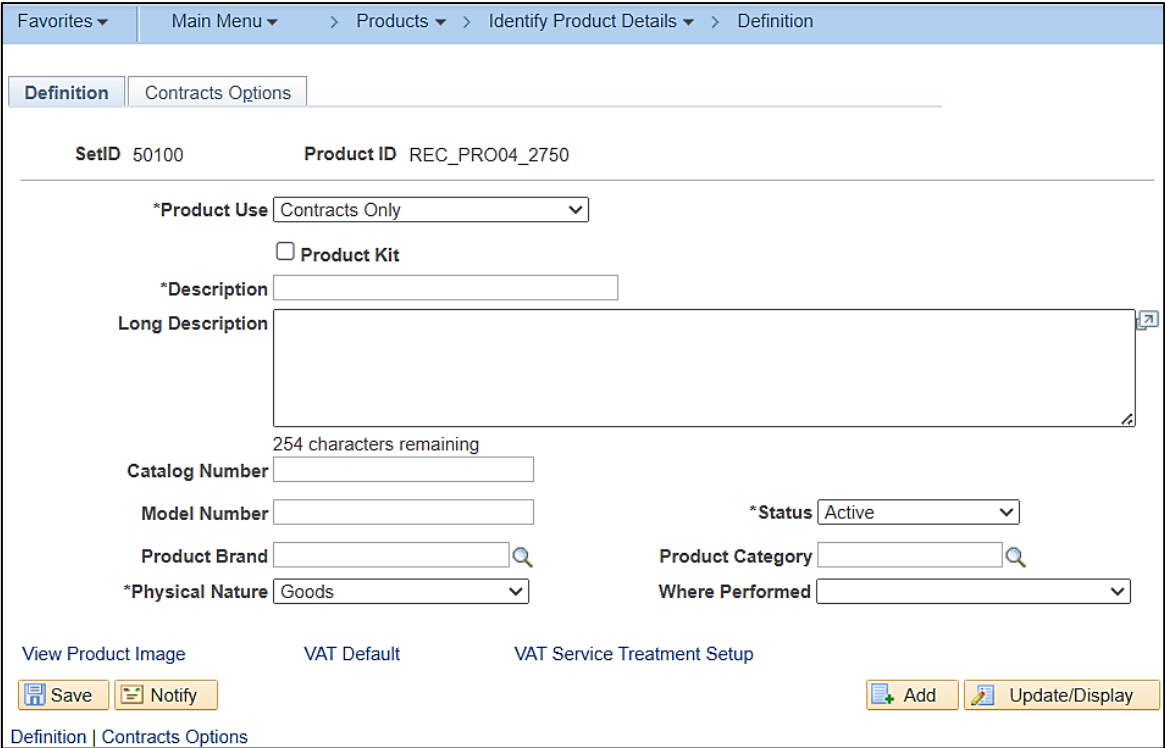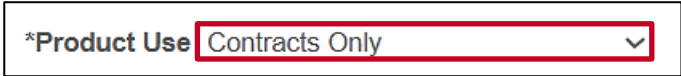
Step	Action
	The **Product Definition Add a New Value** page displays. **Product Definition** **Add a New Value** 🔍 Find an Existing Value *SetID 50100 🔍 *Product ID NEXT 🔍 Add
3.	The **SetID** field defaults based on the Agency. Click the **Product ID Look Up** icon and select the applicable Product ID (it will be the prefix "REC_" followed by a combination of the Category Code and Recurring Amount (i.e., "REC_PRO04_2750"). *SetID 50100 🔍 *Product ID REC_PRO04_27 🔍 Add
ℹ️	The first 12 characters may only display in the **Product ID** field. However, up to 18 characters can be used and all characters will display in the **Product ID** field on the **Definition** page once added.
4.	Click the **Add** button. Add

![Cardinal logo]

Step	Action
	The **Definition** page displays. **Favorites ▾** **Main Menu ▾** > Products ▾ > Identify Product Details ▾ > Definition **Definition** | Contracts Options SetID 50100 Product ID REC_PRO04_2750 *Product Use [Contracts Only ▾] ☐ Product Kit *Description [ ] Long Description [ ] 254 characters remaining Catalog Number [ ] Model Number [ ] *Status [Active ▾] Product Brand [ ] 🔍 Product Category [ ] 🔍 *Physical Nature [Goods ▾] Where Performed [▾] View Product Image VAT Default VAT Service Treatment Setup 🖫 Save ✉ Notify 📄 Add 📝 Update/Display Definition | Contracts Options
ℹ	The **Product Use** field defaults to "Contracts Only". Do not change. *Product Use [Contracts Only ▾]
5.	In the **Description** field, enter "Recurring Contract – followed by the dollar sign ("$") and the recurring amount". See example below: *Description [Recurring Contract - $2750.00]
6.	Click the **Physical Nature** dropdown button and select the appropriate option ("Goods" or "Services"). *Physical Nature [Goods ▾]
7.	Click the **Contracts Options** tab. [Definition] [Contracts Options]
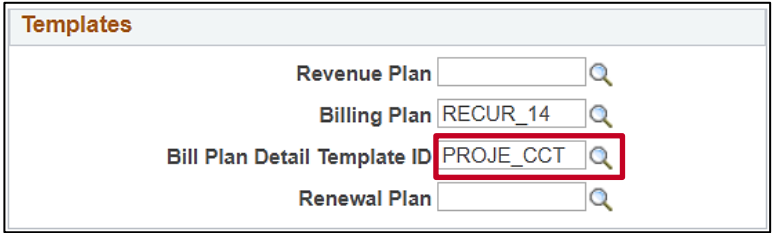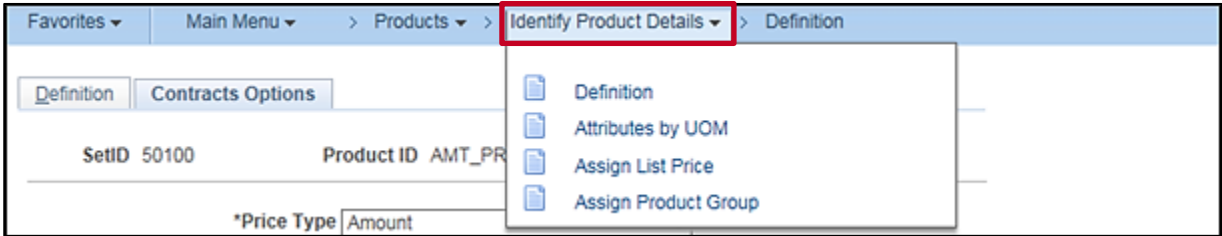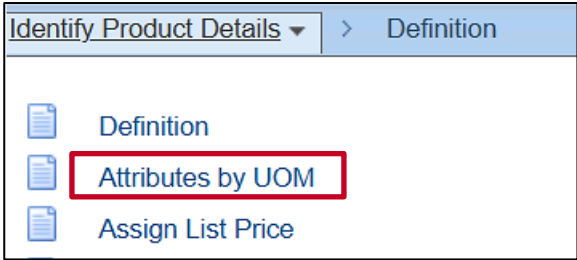
Step	Action
	The **Contracts Options** page displays.

8.	Enter or select the following:
	
	    a. **Price Type**: "Recurring"
	    b. **Recognition Method**: "Billing Manages Revenue"

9.	Click the **Billing Plan Look Up** icon in the **Templates** section and select the appropriate Billing Plan. The Billing Plan will associate the length of the Product to the Contract. Example: "RECUR_14" indicates monthly recurring amounts for 14 Months.

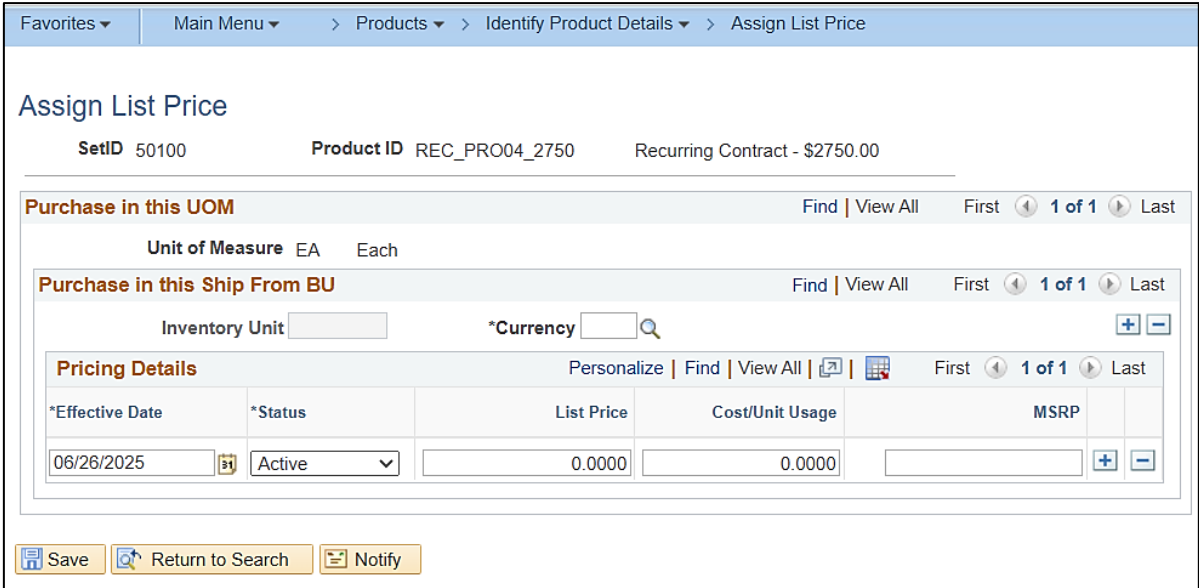| Step	Action
10.	Click the **Bill Plan Detail Template ID Look Up** icon and select the appropriate option based on the Project (i.e., "PROJE_CCT" is Non-Federal Project – CCT). **Templates** Revenue Plan ☐ 🔍 Billing Plan RECUR_14 🔍 Bill Plan Detail Template ID PROJE_CCT 🔍 Renewal Plan ☐ 🔍
ℹ	The selected **Bill Plan Detail Template ID** defaults some of the Contract billing information such as the Bill Source, Bill Identifier, and Bill Cycle Identifier on the recurring Invoice.
11.	Click the **Save** button. 🖫 Save ✉ Notify
12.	From the navigation breadcrumbs above the page, click the **Identify Product Details** dropdown button. Favorites ▾ Main Menu ▾ > Products ▾ > Identify Product Details ▾ > Definition Definition | Contracts Options SetID 50100 Product ID AMT_PR *Price Type Amount 📄 Definition 📄 Attributes by UOM 📄 Assign List Price 📄 Assign Product Group
13.	Click the **Attributes by UOM** link. Identify Product Details ▾ > Definition 📄 Definition 📄 Attributes by UOM 📄 Assign List Price
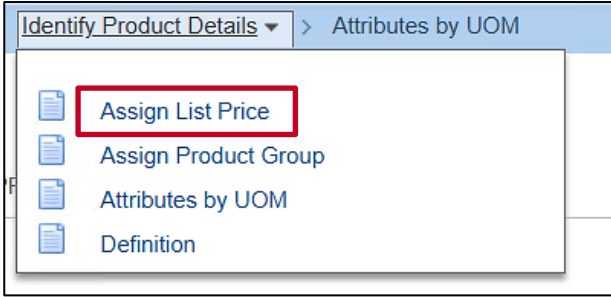
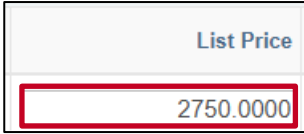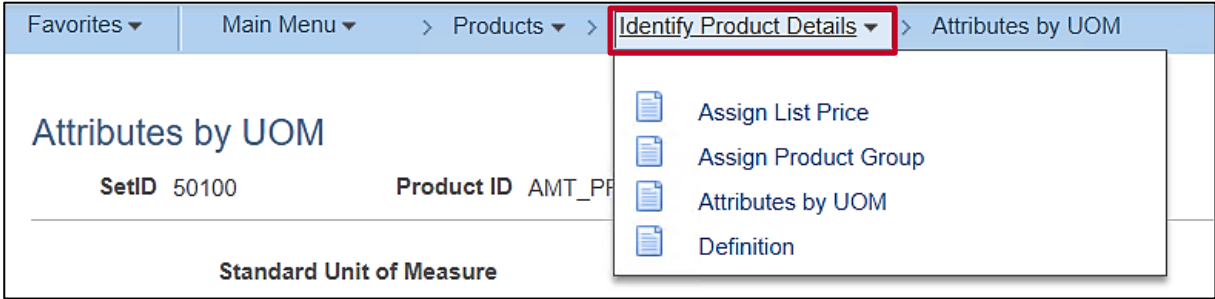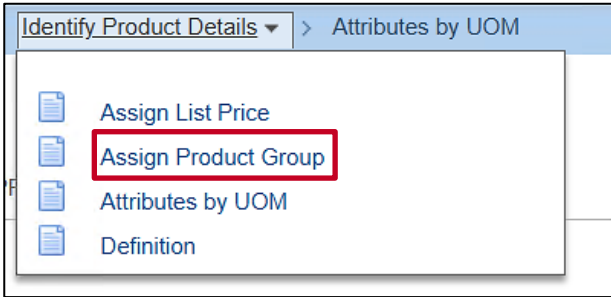| Step	Action
	The **Attributes by UOM** page displays.
14.	Enter or select "EA" (each) in the **UOM** (Unit of Measure) field. For recurring Contracts, the **UOM** is always "EA".
15.	Click the **Save** button.
17.	From the navigation breadcrumbs above the page, click the **Identify Product Details** dropdown button.

Step	Action
18.	Click the **Assign List Price** link.

The **Assign List Price** page displays.

Step	Action
19.	Select or enter "USD" in the **Currency** field.

| 20. | Enter "12/05/2011" in the **Effective Date** field. |

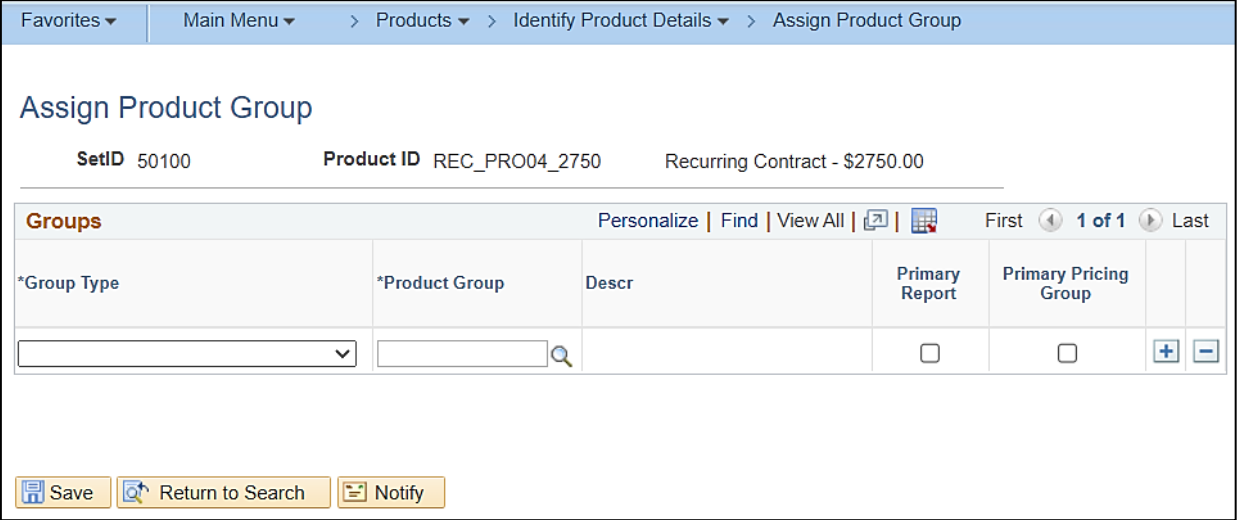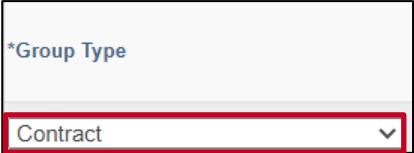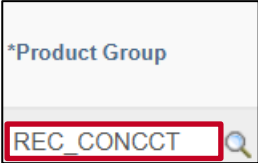| ℹ️ | The Effective Date should always be "12/05/2011". This date determines when the Product is available for use. |
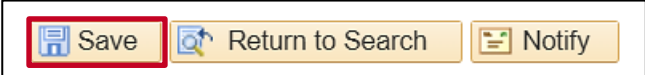
Step	Action
21.	Enter the appropriate recurring amount in the **List Price** field. List Price 2750.0000
ℹ	The List Price entered defines the amount for each recurring bill.
22.	Click the **Save** button. 🖫 Save ↻ Return to Search 🗐 Notify
23.	From the navigation breadcrumbs above the page, click the **Identify Product Details** dropdown button. Favorites ▾ Main Menu ▾ > Products ▾ > Identify Product Details ▾ > Attributes by UOM Attributes by UOM SetID 50100 Product ID AMT_PF Standard Unit of Measure 📄 Assign List Price 📄 Assign Product Group 📄 Attributes by UOM 📄 Definition
24.	Click the **Assign Product Group** link. Identify Product Details ▾ > Attributes by UOM 📄 Assign List Price 📄 Assign Product Group 📄 Attributes by UOM 📄 Definition
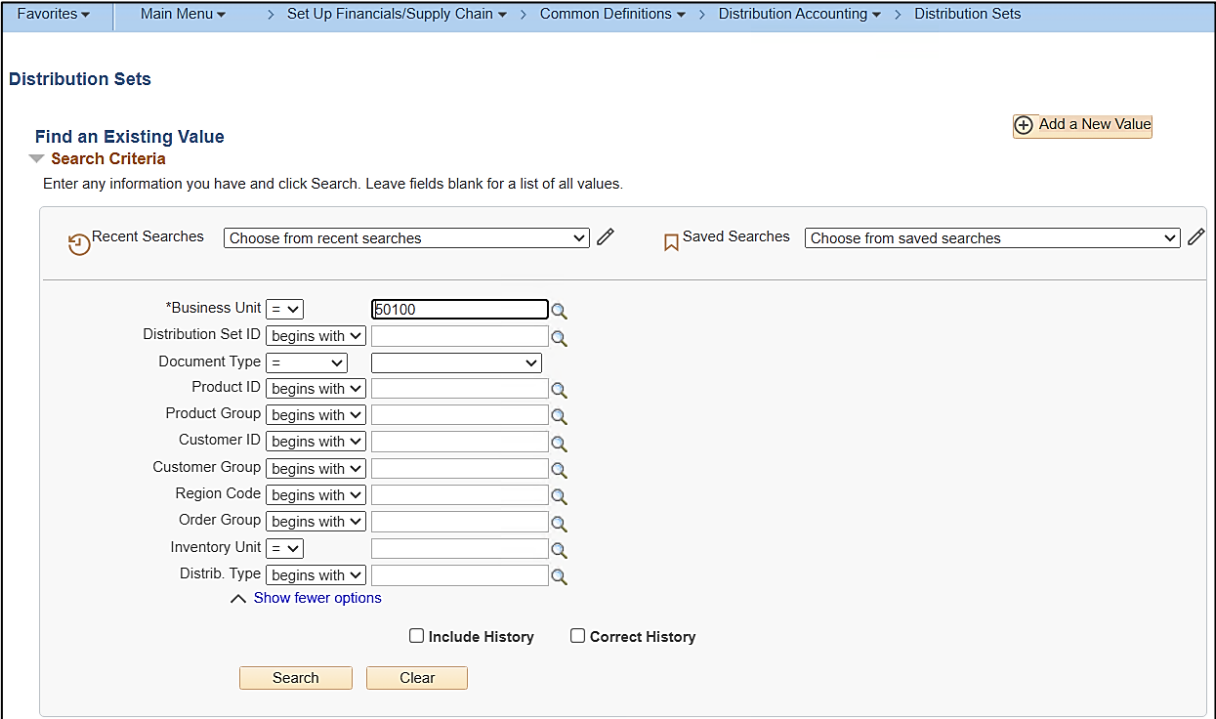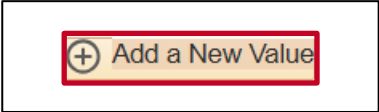
Step	Action
	The **Assign Product Group** page displays.

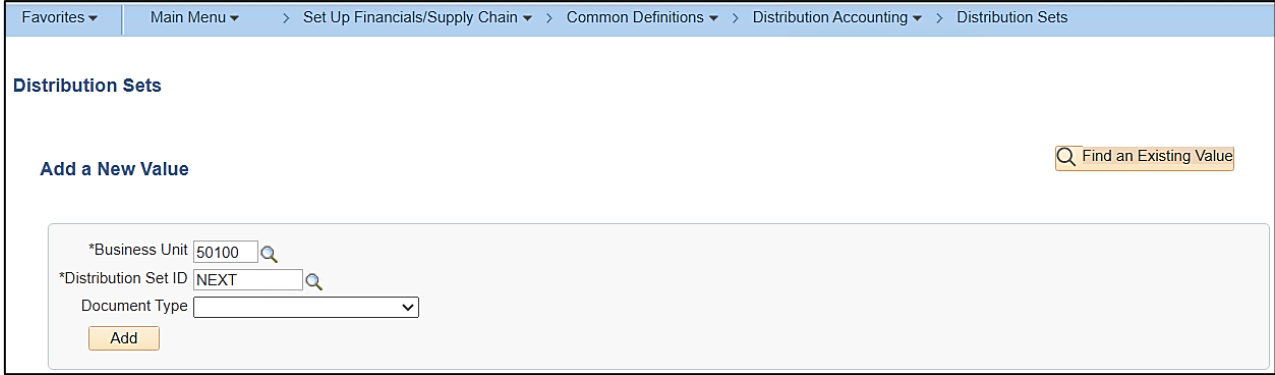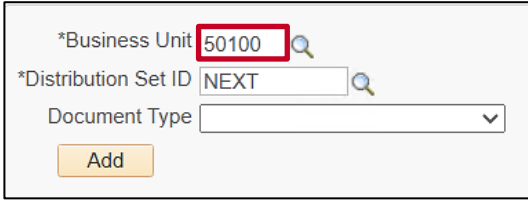| Step	Action
25.	Enter or select "Contract" in the **Group Type** field.
26.	Click the **Product Group Look Up** icon and select the applicable Product Group.
(i)	The selection made in the **Product Group** field determines where the Product will be found when searching for the Product on the Contract.
27.	Click the **Save** button.
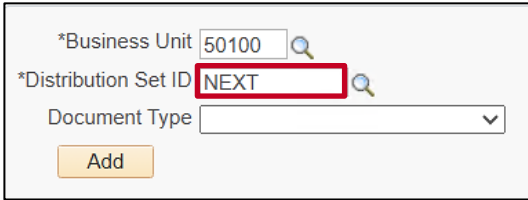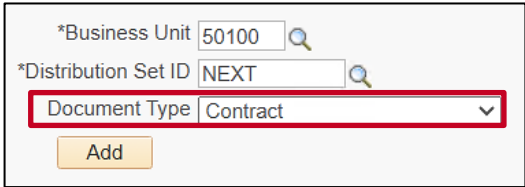
Defining a Distribution Set

Step	Action
1.	Navigate to the **Distribution Sets** page using the following path: **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Distribution Accounting > Distribution Sets**
	The **Distribution Sets Find an Existing Value Search** page displays.
ℹ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Click the **Add a New Value** button.

Step	Action
	The **Distribution Sets Add a New Value** page displays.
ℹ	The **Business Unit** field defaults based on the Agency. Do not change.
ℹ	The **Distribution Set ID** field defaults to "NEXT". Do not change.
3.	Click the **Document Type** dropdown button and select "Contract".
4.	Click the **Add** button.

Step	Action
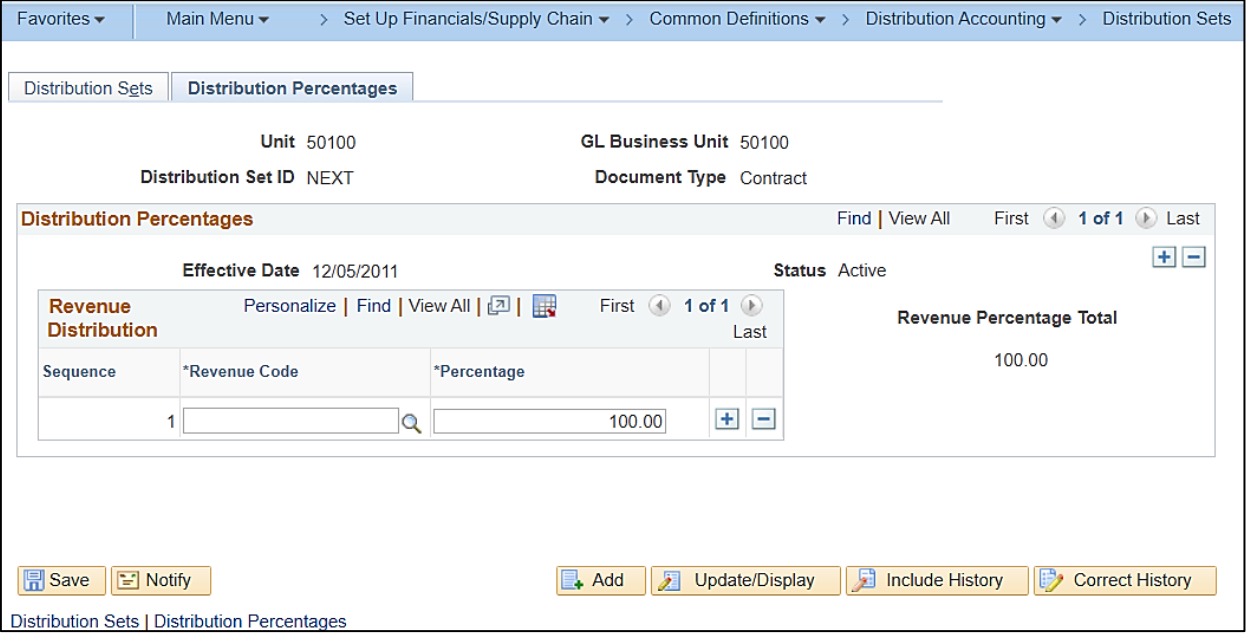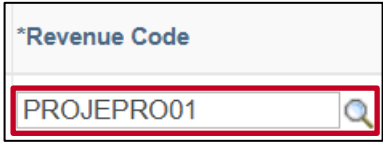
The **Distribution Sets** page displays.

5.	Enter "12/05/2011" in the **Effective Date** field.

ℹ	The Effective Date should always be "12/05/2011". This date determines when the Product is available for use.

6.	Click the **Product ID Look Up** icon and select the Product ID previously created.

7.	Review the **Status** field and confirm that it displays "Active".

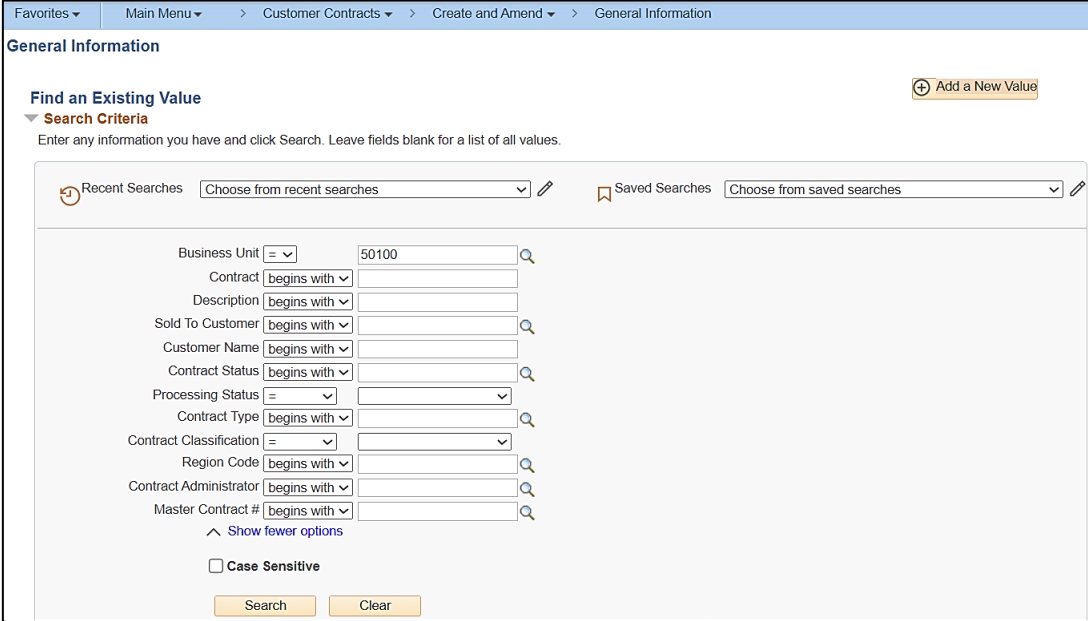|	
8.	Click the **Distribution Percentages** tab.

Step	Action
	The **Distribution Percentages** page displays.
9.	Click the **Revenue Code Look Up** icon and select the applicable Revenue Code (Distribution Code) for the Product created.
ℹ	General Ledger ChartFields are linked to the Revenue Code and default on the Revenue Line of the Product.
10.	Click the **Save** button.
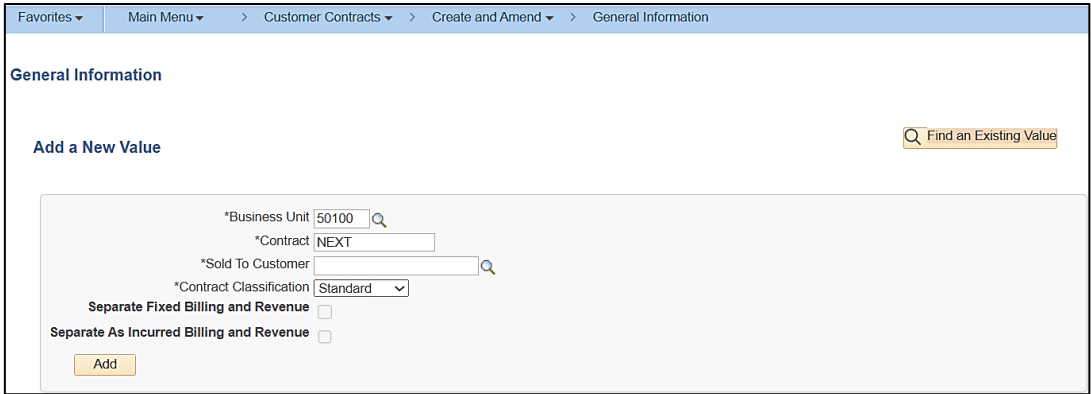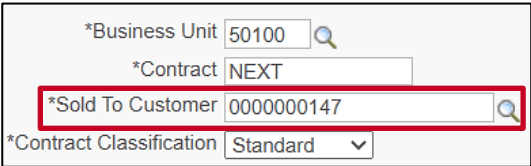
Creating a Non-Federal Recurring Contract

Step	Action
1.	Navigate to the **General Information** page using the following path: **Main Menu > Customer Contracts > Create and Amend > General Information**

The **General Information Find an Existing Value Search** page displays.

	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Click the **Add a New Value** button.

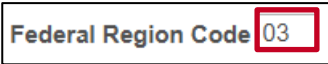| Step	Action
	The **General Information Add a New Value** page displays. ![General Information Add a New Value page] Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information **General Information** **Add a New Value** 🔍 Find an Existing Value *Business Unit 50100 🔍 *Contract NEXT *Sold To Customer _____ 🔍 *Contract Classification Standard ▾ Separate Fixed Billing and Revenue ☐ Separate As Incurred Billing and Revenue ☐ [Add]
ℹ	The **Business Unit** field defaults based on the Agency and should not be changed. The **Contract** field defaults to "NEXT" and should not be changed. The **Contract Classification** field defaults to "Standard" and should not be changed.
3.	Click the **Sold To Customer Look Up** icon and select the applicable Customer ID Number. *Business Unit 50100 🔍 *Contract NEXT *Sold To Customer 0000000147 🔍 *Contract Classification Standard ▾
ℹ	The Contract cannot be set up unless the Customer is created in the system. For further information on creating a Customer, see the Job Aid titled **AR323_Creating and Maintaining Customers (VDOT Only)**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
4.	Click the **Add** button. [Add]

![Cardinal logo]

Step	Action
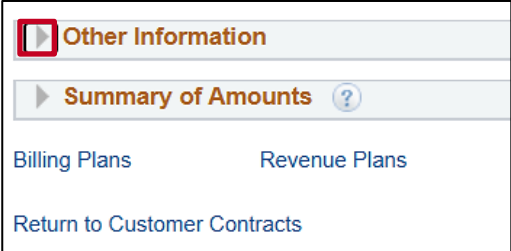
The **General Information** page displays.

	Creating a Contract Header: The following steps detail the process to create the Contract Header.

5	Enter a short, detailed description of the Contract in the **Description** field.
	Description [Property Damage Contract]

6.	Click the **Contract Type Look Up** icon and select the applicable Contract Type.
	Contract Type [O] 🔍

7.	The **Contract Signed** field defaults to the current date. Update this date to the date the agreement was signed with the third-party Customer as needed.
	Contract Signed [06/10/2025] 📅

	The date defined in the **Contract Signed** field will also default the date of the accounting distribution.

Step	Action
8.	Click the **Expand** icon to expand the **Other Information** section. ▶ Other Information ▶ Summary of Amounts ⑦ Billing Plans Revenue Plans Return to Customer Contracts
9	Click the **Legal Entity Look Up** icon and select "STATE". Legal Entity STATE 🔍
ⓘ	The **Federal Region Code** field defaults to "03" (FHWA). Do not change. Federal Region Code 03
10.	Click the **Save** button. 💾 Save ✉ Notify

Step	Action
	The **General Information** page refreshes and displays the assigned Contract Number.

Step	Action
11.	Click the **Lines** tab.

The **Lines** page displays.

Step	Action
ℹ	**Creating a Contract Line**: The following steps detail the process to create a Contract Line. Each Contract Line represents a unique Contract Product that is associated with its own accounting distributions, limits, billing plans, and revenue plans.
12.	Click the **Add Contract Lines** button.

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

Step	Action
13.	Click the **Price Type** dropdown button and select "Recurring".
ℹ	Setting the Price Type to "Recurring" automatically populates Non-Federal Products as only Non-Federal Contracts can have recurring Contract Lines.
14.	Click the **Search** button.

Step	Action
	The search results display.

Step	Action
15.	Click the **Select** checkbox option for the Product being used to create the Contract Line.
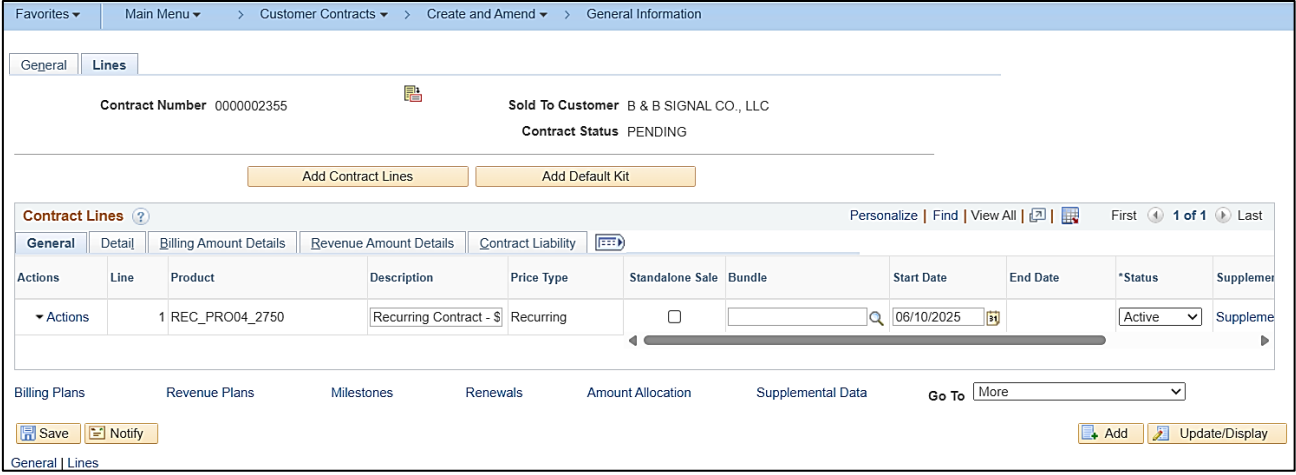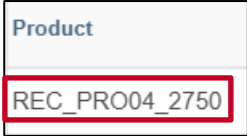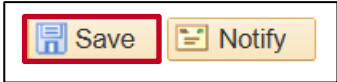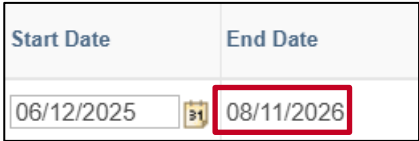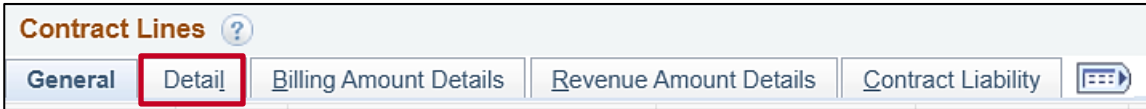
Step	Action
16.	Click the **Start Date Calendar** icon and select the date that the Contract was signed.

Step	Action
ℹ	The schedules associated with the recurring Products are all configured to have a start date on the 12th of the month. If a date prior to the 12th of the current month is entered, then the start date changes to the 12th of the current month when the Contract Line is saved. If a Start Date that is after the 12th of the current month is entered, then the Start Date changes to the 12th of the following month when the Contract Line is saved.
ℹ	All of the **Create Plans from Template** and **Combine Like Templates** checkbox options are selected by default. Do not change. **Create Plans from Template** ☑ Billing Plans ☑ Revenue Plans ☑ Renewal Plans **Combine Like Templates** ☑ Billing Plans ☑ Revenue Plans
17.	Scroll down to the bottom of the page as needed and click the **Add Contract Lines** button. Add Contract Lines

The **General Information Add Contract Lines** refreshes with a message indicating that 1 Line has been added to the Contract.

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

General Information
Add Contract Lines

Search ⑦

Product Group [_____] 🔍   ☐ Product Kits
Product [_____]   ☐ Renewable
Product Description [_____]
Price Type [Recurring ▾]
Physical Nature [_____ ▾]

[Search]   1 line(s) have been added to the contract

Create Adhoc Product   Return to Contract Lines

Step	Action
18.	Click the **Return to Contract Lines** link. Return to Contract Lines

Step	Action
	The **Contract Lines** page redisplays.
ℹ	The selected Product displays in the **Product** field.
19.	Click the **Save** button.
ℹ	The **End Date** field auto-calculates based on the number of events for the Product and will display after the Contract is saved.
20.	Click the **Detail** tab within the **Contract Lines** section.
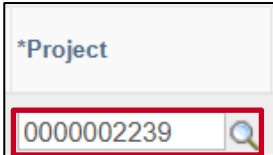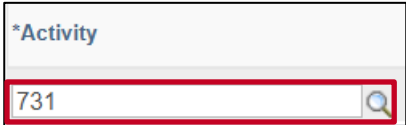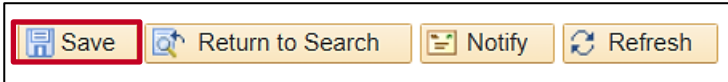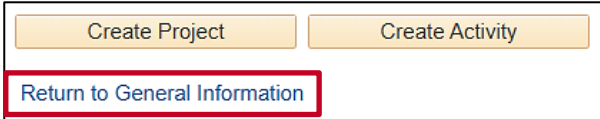
Step	Action
	The **Contract Lines Detail** tab displays. ![Contract Lines Detail tab screenshot showing Contract Lines with Actions, Line, Product (1 REC_PRO04_2750), Description (Recurring Contract - $), Price Type (Recurring), Billing Plan (Pending), Revenue Plan (Billing Manages Revenue), Contract Terms, Accounting (Distribution), Internal Notes, Ship to. Below are links: Billing Plans, Revenue Plans, Milestones, Renewals, Amount Allocation, Supplemental Data, Go To More. Save, Notify, Add, Update/Display buttons. General	Lines.]
21.	Click the **Contract Terms** link. ![Contract Terms link highlighted]
	The **Related Projects** page displays. ![Related Projects page screenshot. Navigation: Favorites, Main Menu > Customer Contracts > Create and Amend > General Information > Contract Terms. Related Projects tab. Contract Number 0000002355, Sold To Customer B & B SIGNAL CO., LLC, Amendment Number, Contract Status PENDING. Contract Line 1, Price Type Recurring, Product REC_PRO04_2750, Description Recurring Contract - $2750.00, PC Business Unit. Associated Projects & Activities grid with columns *Project, *Activity, Source Type, Category, Subcategory. Create Project, Create Activity buttons. Return to General Information. Amount Allocation. Save, Return to Search, Notify, Refresh, Update/Display, Include History, Correct History buttons.]

Step	Action
ⓘ	**Associating Projects and Activities**: The following steps detail the process to associate a Project and Activity with a recurring Contract Line. Only a single Project/Activity combination can be associated with one recurring Contract Line. This Project/Activity combination is then associated with the recurring billing events each time they are generated and sent to Billing.
22.	Click the **PC Business Unit Look Up** icon and select the Agency Business Unit. PC Business Unit `50100` 🔍
23.	Complete the **Associated Projects & Activities** section. Click the **Project Look Up** icon and select the appropriate Project ID. *Project `0000002239` 🔍
24.	Click the **Activity Look Up** icon and select the applicable Activity. The first Activity within the phase being billed should be added. *Activity `731` 🔍
ⓘ	The same Project/Activity combination can be associated with multiple recurring or amount-based Contract Lines.
25.	Click the **Save** button. 🖫 Save | ⟳ Return to Search | ▤ Notify | ⟳ Refresh
26.	Click the **Return to General Information** link. Create Project | Create Activity Return to General Information

Step	Action
The **General Information Contract Lines** page redisplays.	

Step	Action
27.	Click the **Detail** tab within the **Contract Lines** section.

The **Contract Lines Detail** tab displays.

Step	Action
28.	Click the **Distribution** link in the **Accounting** field.

![Cardinal logo]
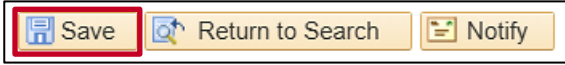
Step	Action
	The **Accounting Distribution** page displays. ![Accounting Distribution page screenshot showing Favorites, Main Menu, Customer Contracts, Create and Amend, General Information, Fixed Amount Acctg Distrib navigation. Contract 0000002355, Line Num 1, Description Recurring Contract - $2750.00, B & B SIGNAL CO., LLC. Billing Amount 0.00, Revenue Amount 0.00, Unit 50100, Currency USD. Effective Date 06/10/2025. Revenue row: Percentage 100.00000000, Revenue Amount 0.00, GL Unit 50100, Distribution Code PROJEPRO01, Account 40042011, Fund 04720, Department 11000. Buttons: Save, Return to Search, Notify, Update/Display, Include History, Correct History.]
ℹ	**Updating the Distribution**: Although Products default the accounting distribution, it is still necessary to access the **Accounting Distribution** page to enter the Project ID on the accounting Distribution Lines.
29.	Click the **Correct History** button to enable entry of the **PC Business Unit**, **Project**, and **Activity** fields on the Distribution Line. ![Buttons: Update/Display, Include History, Correct History (highlighted)]
30.	Scroll over to the right as needed and enter or select the Agency Business Unit in the **PC Business Unit** field. ![PC Business Unit field showing 50100]
31.	Click the **Project Look Up** icon and select the applicable Project ID. ![Project field showing 0000002239]
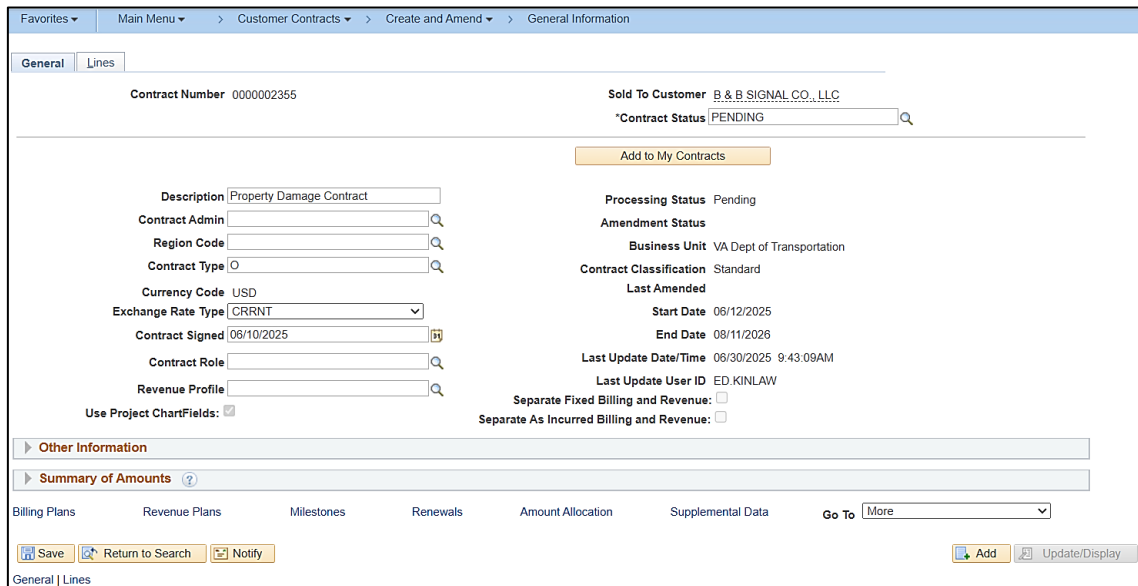
Step	Action
32.	Click the **Activity Look Up** icon and select the applicable Activity. **Activity** 731
ℹ	The Project ID needs to be the same Project ID selected when selecting the Project/Activity combination. The defined Activity must be Active for the distribution to save.
33.	Click the **Save** button. [🖫 Save] [🔍 Return to Search] [🗐 Notify]
34.	From the navigation breadcrumbs above the page, click the **General Information** link. Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Fixed Amount Acctg Distrib

The **General Information** page redisplays.

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

General | Lines

Contract Number 0000002355	Sold To Customer B & B SIGNAL CO., LLC
	*Contract Status PENDING

Add to My Contracts

Description Property Damage Contract	Processing Status Pending
Contract Admin	Amendment Status
Region Code	Business Unit VA Dept of Transportation
Contract Type O	Contract Classification Standard
Currency Code USD	Last Amended
Exchange Rate Type CRRNT	Start Date 06/12/2025
Contract Signed 06/10/2025	End Date 08/11/2026
Contract Role	Last Update Date/Time 06/30/2025 9:43:09AM
Revenue Profile	Last Update User ID ED.KINLAW
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   Amount Allocation   Supplemental Data   Go To More ▾

[🖫 Save] [🔍 Return to Search] [🗐 Notify]   [📥 Add] [Update/Display]

General | Lines

ℹ	**Reviewing the Billing Plan**: The following steps detail the process to review the Billing Plan.

Step	Action
35.	Click the **Billing Plan** link at the bottom of the page. **Billing Plans**
	The **Assign Billing Plan** page displays. Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Assign Billing Plan **Assign Billing Plan** **Contract** 0000002355 Property Damage Contract **Sold To Customer** B & B SIGNAL CO., LLC **Contract Lines to be Assigned / Unassigned** Personalize | | View All | 📷 | 📋 First ◁ 1 of 1 ▷ Last | ☐	Line	Product	Line Description	Billing Amount	Price Type	Plan	Plan Description	Billing Method	Status
---	---	---	---	---	---	---	---	---	---
☐	1	REC_PRO04_2750	Recurring Contract - $2750.00		Recurring	B101	Recurring Monthly - 14	Recurring	Pending	 ☑ Select All ☐ Clear All **Bill Plan to Assign / Unassign** **Billing Plan** NEXT 🔍 **Billing Plan Template** [____] 🔍 **Billing Method** [____ ▾] **Bill Plan Detail Template ID** [____] 🔍 **Description** [____] [Assign] Assign selected Lines/Sequences to Billing Plan [Unassign] Unassign selected Lines/Sequences from Billing Plan Return to General Information [🔍 Return to Search] [📧 Notify]
36.	Click the **B101** link in the **Plan** field. 	Price Type	Plan	Plan Description
------------	------	------------------
Recurring	B101	Recurring Monthly - 14	

Step	Action
	The **Define Billing Plan** page displays.
37.	Click the **Recurring Detail** tab.

Step	Action
	The **Recurring Detail** page displays.

(i)	This page allows the user to preview future recurring billing events associated with the bill plan. The user can also stop the recurring billing before the scheduled end date by changing the end date and saving the page.

Step	Action
38.	Select the **Date** radio button option within the **Preview Options** section.

Step	Action
39.	Click the **Preview** button.

Step	Action
	The **Recurring Detail Preview Results** display.
40.	Review the information to ensure accuracy and then click the **Save** button.
41.	From the navigation breadcrumbs above the page, click the **General Information** link.

![Cardinal logo]

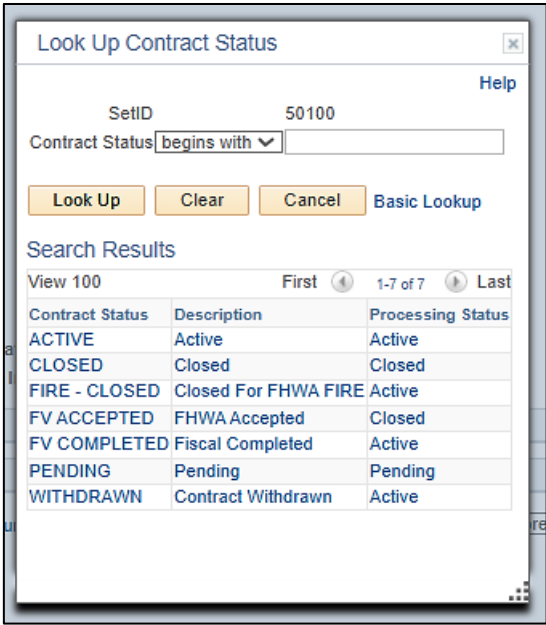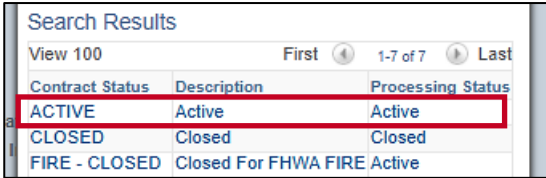| Step	Action
	The **General Information** page displays.
ⓘ	**Activating the Contract**: The following steps detail the process to activate a Contract.
42.	Click the **Contract Status Look Up** icon.

Step	Action
	The **Look Up Contract Status** page displays in a pop-up window.

Step	Action
43.	Click the **Active** link.

Step	Action
	The **General Information** page redisplays with the **Contract Status** field set to "Active".
44.	Click the **Save** button.