

9.2 Stand Alone Contract - Creation to Activation

Purpose: Use this document to create a stand alone contract in ctcLink.

Audience: Finance.

 You must have at least one of these local college managed security roles:

- ZC Contracts Processing
- ZZ Contract Maintenance
- ZZ Contract Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

 This type of contract will become a **Fixed Price Contract**. Any As Incurred or Cost Reimbursable Items should be set up as Cost Reimbursable Contract, please refer to QRG [9.2 Reimbursable Contract - Creation to Activation](#).

Creating a Stand Alone Contract

Navigation: NavBar > Navigator > Customer Contracts > Create and Amend > General Information

1. On the **General Information** search page, select the **Add a New Value** tab.
2. Enter or search for the **Business Unit**.
3. Leave the **Contract** field with the default of **Next**. The system will generate a contract number.
4. Enter or search for the **Sold to Customer**. Use the sponsor or customer for contract.
5. Leave the **Contract Classification** field with the default of **Standard**.
6. The **Separate Fixed Billing and Revenue** field should be unchecked.
7. The **Separate As Incurred Billing and Revenue** field should be unchecked.
8. Select **Add**. The **General Information** page will display.

General Information

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

Business Unit

Contract

Sold To Customer

Contract Classification

Separate Fixed Billing and Revenue ☐

Separate As Incurred Billing and Revenue ☐

Add

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

9. On the **General tab**, enter **Description**.
10. In the **Contract Type** field, enter or select **Contract Serv.**
11. Enter the **Contract Signed** date. By default, it will default to the current date, so it must be adjusted to the actual date the contract was signed.
12. Select **Save**.

General **Lines**

Contract Number 000000000000000000353 Sold To Customer Central Valley School District *Contract Status

Description <input type="text"/>	Processing Status Pending
Contract Admin <input type="text"/> <input type="button" value="Q"/>	Amendment Status
Region Code <input type="text"/> <input type="button" value="Q"/>	Business Unit COMMUNITY COLLEGES OF SPOKANE
Contract Type CONTRACT SERV. <input type="button" value="Q"/>	Contract Classification Standard
Currency Code USD	Last Amended
Exchange Rate Type CRRNT <input type="button" value="v"/>	Last Update Date/Time 09/26/2018 11:58:53AM
Contract Signed 09/26/2018 <input type="button" value="Q"/>	Last Update User ID CTC_KCLARK
Contract Role <input type="text"/> <input type="button" value="Q"/>	Separate Fixed Billing and Revenue: <input type="checkbox"/>
Revenue Profile <input type="text"/> <input type="button" value="Q"/>	Separate As Incurred Billing and Revenue: <input type="checkbox"/>

Use Project ChartFields: ☐

▶ **Other Information**

▶ **Summary of Amounts**

[Billing Plans](#) [Revenue Plans](#) [Milestones](#) [Renewals](#) [Amount Allocation](#) [Supplemental Data](#) Go To

Save

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

13. Select the **Lines** tab.
14. Select the **Add Contract Lines** button. The **Add Contract Lines** page will display.

15. In the **Product** field, enter in **Contract**.
16. Select **Search**.
17. In the search results area, a new line appears that has a product of **CONTRACT_SERVICES**. Check the box to select the new line.
18. Enter **Start Date** and **End Date** to the contract on the line.
19. Select the **Add Contract Lines** button.

20. In the **Search** box, next to the **Search** button, a new message appears that reads *"1 line(s) have been added to the contract"*.

21. Select the **Return to Contract Lines** link. The **Contract Line** page displays.

[General Information](#)

Add Contract Lines

Search ⓘ

Product Group

Q

Product

CONTRACT

Product Description

Price Type

▼

Physical Nature

▼

Search

1 line(s) have been added to the contract

[Create Adhoc Product](#)

[Return to Contract Lines](#)

22. The **Contract Line** page includes the new product in the line. The line has the **Start Date** and the **End Date** that was added when the contract line was created.

23. Select **Save**.

General

Lines

Contract Number

0000000000000000000353

Sold To Customer

Central Valley School District

Contract Status

PENDING

Add Contract Lines

Add Default Kit

Contract Lines

General

Detail

Billing Amount Details

Revenue Amount Details

Actions

Line

Product

Description

Price Type

Standalone Sale

Bundle

Start Date

End Date

*Status

Supp

▼ Actions

1

CONTRACT_SERVICES

Fund 140 Contract

Amount

☐

07/01/2019

06/30/2020

Active

Supp

Billing Plans

Revenue Plans

Milestones

Renewals

Amount Allocation

Supplemental Data

Go To

More

Save

Notify

General

Lines

24. Select the **Detail** tab under the **Contract Lines** section.

25. Select the **Distribution** link under the **Accounting** column.

General

Lines

Contract Number

00000000000000000353

Sold To Customer

Central Valley School District

Contract Status

PENDING

Add Contract Lines

Add Default Kit

Contract Lines

1-1 of 1

General

Detail

Billing Amount Details

Revenue Amount Details

Actions	Line	Product	Description	Price Type	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▼ Actions	1	CONTRACT_SERVICES	Fund 146 Contract	Amount	Contract Terms	Distribution	Internal Notes	Central Valley School District

Billing Plans

Revenue Plans

Milestones

Renewals

Amount Allocation

Supplemental Data

Go To

More

Save

Notify

26. Select the **Correct History** button.
27. Enter the **Revenue** distribution for the contract payment (for this example, Account = 4020120, Operating Unit = 7240, Fund = 146, Dept. = 31005, Class = 112, State Purpose = N).
28. Enter the **Contract Asset** distribution for the contract payment (for this example, Account = 1010050, Operating Unit = 7240, Fund = 146, Dept. = 31005, Class = 112, State Purpose = N).
29. Select **Save**.

💡 Please contact your local college Finance Director or Budget Manager if unsure of the Accounting distributions.

Accounting Distribution
State Board for Comm & Tech Colleges

Contract 000000000000000000003935 Line Num 1 Description Contracts

Billing Amount 10,000.00 Revenue Amount 10,000.00 Unit WA240 Currency USD

Accounting Distributions 1 of 1 View All

*Effective Date 03/01/2023

Define Distributions By
☒ Percent [Calculate Amounts](#)
☐ Amount

Revenue

GL Unit	Distribution Code	Account	Oper Unit	Fund	Approp	Dept	Class	State Purpose	Project
WA240		4020120	7240	146		31005	112	N	

Contract Asset

GL Unit	Distribution Code	Account	Oper Unit	Fund	Approp	Dept	Class	State Purpose	Project	Program	Subsidiary
WA240		1010050	7240	146		31005	112	N			

[Return to General Information](#)

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

30. A message box displays. Select **OK**.
31. Select the **Return to General Information** link.

Accounting Distribution
Central Valley School District

Contract 000000000000000000003553 Line Num 1 Description Fund 146 Contract

Billing Amount 0.00 Revenue Amount 0.00 Unit WA170 Currency USD

Accounting Distributions 1 of 1 View All

*Effective Date 07/01/2019

Define Distributions By
☒ Percent [Calculate Amounts](#)
☐ Amount

Revenue

Distribution Code	Oper Unit
	7170

Contract Asset

Class	State Purpose	Project	Program	College Defined	Affiliate	Fund Affil	Oper Unit Affil	Stat	Valid
101	N								<input checked="" type="checkbox"/>

[Return to General Information](#)

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

32. On the **Lines** tab of the **General Information** page, select the **General** tab.
33. Select the **Amount Allocation** link. The **Amount Allocation** page will display.

General **Lines**

Contract Number 00000000000000000353 Sold To Customer Central Valley School District
Contract Status PENDING

Add Contract Lines Add Default Kit

Contract Lines ?

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

Actions	Line	Product	Description	Price Type	Standalone Sale	Bundle	Start Date	End Date	*Status	Supp
▼ Actions	1	CONTRACT_SERVICES	Fund 146 Contract	Amount	<input type="checkbox"/>		07/01/2019	06/30/2020	Active	Suppl

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

Save Return to Search Notify

General | Lines

41. On the **Details** tab, select the **Pending** link in the **Bill Plan** column and ensure the **Revenue Plan** = "Billing Manages Revenue". The **Define Billing Plan** page will display.

General **Lines**

Contract Number 00000000000000000353 Sold To Customer Central Valley School District
Contract Status PENDING

Add Contract Lines Add Default Kit

Contract Lines ?

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

Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Not
▼ Actions	1	CONTRACT_SERVICES	Fund 146 Contract	Amount	Pending	Billing Manages Revenue	Contract Terms	Distribution	Internal Note

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

Save Return to Search Notify

General | Lines

42. On the **Billing Plan General** tab, in the **Billing Default Overrides** section, enter **Contract** in **Bill By ID**.
43. Modify any other field(s) necessary for the appropriate billing information.
44. The **Pre Approved** and **Direct Invoice** checkboxes should be unchecked.
45. Notice that the **Billing Status** is set to "Pending" and the **Ready at Activation** field has a checkmark in it. This will allow the bill plan to become activated when the contract is set to "Active".
46. Select the **Events** tab.

To change any value on the lines in Event Detail, the line status has to be "Pending". Any other status will not allow the values to be changed.

49. If there is a need for more billing events, select the **Add a New Row [+]** icon at the end of the event detail row and enter the number of lines needed.
50. Split out the payments so that the amounts in the events equal the TOTAL of the lines in the **Event Detail**.
51. In the **Amount Detail** box, the **Total Amount** will be equal to the **Remaining Amount** before the record is saved.
52. Select **Save**.
53. Select the **Return to General Information** link.

Billing Plan General | Billing Plan Lines | **Events** | Tax Parameters | History

Contract 000000000000000000353 BI Unit WA170
Sold To Customer 001000003 Central Valley School District Bill To 001000003 Central Valley School District
Billing Plan ◀ B101 ▶ Fund 146 Contracts Currency USD

Define Events

☐ Percent
☒ Amount
[Add Milestone](#)

Amount Detail

Total Amount 1,000.00
Remaining Amount 0.00

Event Detail Personalize | Find | 1-2 of 2 | Last

Event	Event Type	*Event Status	Event Date	Event Note	Amount
1	Date	Pending	07/01/2019		500.00
2	Date	Pending	07/01/2020		500.00

[Return to General Information](#)

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Upd.](#)

Billing Plan General | Billing Plan Lines | **Events** | Tax Parameters | History

54. On the **Lines** tab of the **General Information** page, select the **General** tab.
55. Change the **Contract Status** from "Pending" to "Active".
56. Select **Save**.

General

Lines

Amendments

Contract Number

00000000000000003935

Sold To Customer

State Board for Comm & Tech Colleges

Amendment Number

0000000000

*Contract Status

ACTIVE

Amend Contract

Add to My Contracts

Description

Test Stand Alone

Processing Status

Active

Contract Admin

Amendment Status

Region Code

Business Unit

SOUTH PUGET SOUND COMM COLLEGE

Contract Type

CONTRACT SERV.

Contract Classification

Standard

Currency Code

USD

Last Amended

Exchange Rate Type

CRRNT

Start Date

03/01/2023

Contract Signed

03/01/2023

End Date

06/30/2023

Contract Role

Last Update Date/Time

04/04/2023 4:31:12PM

Revenue Profile

Last Update User ID

101052421

Use Project ChartFields:

☐

Separate Fixed Billing and Revenue:

☐

Separate As Incurred Billing and Revenue:

☐

Other Information

Summary of Amounts ?

Billing Plans

Revenue Plans

Milestones

Renewals

Supplemental Data

Go To

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Save

Return to Search

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Add

Update/Display

General

Lines

Amendments

57. Process Complete.