Reviewing Revenue Plans

Purpose: Use this document as a reference for reviewing revenue plans in ctcLink.

Audience: Finance/Grant Fiscal Staff.

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

- ZC Contracts Processing
- 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.

Navigation: Customer Contracts > Review Revenue > Plans

Reviewing Revenue Plans

1. If it did not default, enter or select the business unit in the **Business Unit** field.
2. If appropriate, enter a specific contract in the **Contract** field or leave blank to search on all contracts.
3. If appropriate, use the **Plan Status** drop-down listbox to select a specific revenue plan status or leave blank to search on all revenue plans. **Pending** is used for this example.
4. Leave all the check boxes in both the **Method** and **Fee Type** sections selected. This allows for all revenue plans that might be associated to the contract search to appear.
5. Select the **Search** button and the **Review Revenue - Plans** page will display.
6. Review the revenue plans returned from the search.
7. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to Reviewing Revenue Plans. This link will open in a new tab/window.