

# Fixed Contract Billing Limit Amendment


**Purpose:** Use this document to amend a Fixed Price Contract (FPC) or limit amendment 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 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.

 If a FPC Billing was started but not completed, a Limit Amendment cannot be done. Please complete the [FPC Billing](#) process and once the AR Update process is run, then a limit amendment can be made.

 Navigate to the Award Profile > Funding Inquiry tab to check if the **Total Budget Amount** (Grant-side) matches the **Total Award Amount** (Contract-side).

Award
Funding
Resources
Certifications
Terms
Milestones
Key Words
Funding Inquiry

Award ID 00000000000000004332

Reference Award Number

Total Projected Award Amount \$50,118.00
Total Reported Award Amount \$50,118.00
Total Posted Budget Amount \$55,118.00

Total Limit Amount \$0.00

Begin Date 04/15/2021

End Date 12/31/2026

Recalculate the Amounts

Contract Lines
Find | View All
First 1 of 1 Last

Contract Line 1

Total Posted Budget Amount \$55,118.00

Billing Limit Amount \$0.00

Project Detail
Personalize | Find |
First 1 of 1 Last

| Project      | Activity | Funded Amount | Posted Budget Amount |
|--------------|----------|---------------|----------------------|
| 1 0000009414 | GENRL    | \$55,118.00   | \$55,118.00          |

Save
Return to Search
Notify
Refresh
Add
Update/Display

Award | Funding | Resources | Certifications | Terms | Milestones | Key Words | Funding Inquiry

## Fixed Contract Billing Limit Amendment

Amend the Billing Limit When the Billing Plan is 'Ready' (not invoiced yet)

**Navigation: Customer Contracts > Create and Amend > Define Contract General Info**

1. On the **General Information** search page, select the **Find an Existing Value** tab.
2. Enter or look up the **Business Unit**.
3. Enter or look up the **Contract** to be amended. Select **Search**.
4. The **General Information** page will display. Select the **Lines** tab.
5. Select the **Detail** tab to verify the **Billing Plan** status. If Billing Plan is 'Ready' then the FPC Award has not been invoiced yet.
6. Select the **Amend Contract** button.

**Define Contract General Info**

Contract Number 0000000000000004332 Sold To Customer Corporation for Public Broadcasting  
Amendment Number 0000000000 Contract Status ACTIVE

[Amend Contract](#)

**Contract Lines** ?

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

| Actions   | Line | Product     | Description           | Price Type | Billing Plan | Revenue Plan            | Contract Terms | Accounting   |
|-----------|------|-------------|-----------------------|------------|--------------|-------------------------|----------------|--------------|
| ▼ Actions | 1    | FIXED_PRICE | Fixed Price Contracts | Amount     | Ready        | Billing Manages Revenue | Contract Terms | Distribution |

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To

[Save](#) [Return to Search](#) [Notify](#)

General | Lines | Amendments

- The **Amendments** tab appears. Under the **Amendments** section, select from the drop down arrows the **Amendment Type** and **Reason**.
- Select the **Save** button. Notice the Amendment Status = **Pending**.
- Select the newly added amendment row **Detail** link. The **Amendment Details** page will display.

General Lines **Amendments**

Contract Number 0000000000000004332 Sold To Customer Corporation for Public Broadcasting  
Pending Amendment 0000000001 Contract Status ACTIVE

[View Current](#)

**Amendments**

General **Statistics** Billing Amended Amounts Revenue Amended Amounts Misc.

| Amendment  | Amendment Type | Reason       | Process Date | Amendment Status | Detail                 | Notes                 |
|------------|----------------|--------------|--------------|------------------|------------------------|-----------------------|
| 0000000000 |                |              | 09/13/2023   | Complete         | <a href="#">Detail</a> | <a href="#">Notes</a> |
| 0000000001 | Scope Change   | Scope Change | 01/23/2024   | Pending          | <a href="#">Detail</a> | <a href="#">Notes</a> |

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

[Save](#) [Return to Search](#) [Notify](#)

General | Lines | Amendments

- The **Amendment Details** page displays. Increase or Decrease the **Fixed Billing Adjustment** amount as needed.

11. Select the **Save** button. Select the **Amendment Amount Allocation** hyperlink.

**Amendment Details**

Contract0000000000000004332

Amendment Number0000000001

Sold To Customer001002739

Amendment TypeScope Change

\*Process Date01/23/2024

Amendment ReasonScope Change

\*Amendment StatusPending

Total Billing Adjustment0.00

Total Revenue Adjustment0.00

Fixed Billing Adjustment25,000.00

Fixed Revenue Adjustment25,000.00

Fixed Billing AllocationIncomplete

Fixed Revenue AllocationIncomplete

▶ **Additional Amendment Details**

Reference ID

User Ref #1

User Ref #2

**Amendment Components**

GeneralStatistics

| Component | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|-----------|--------------|-----------------|-----------|-----------|-----------|
| 1         |              |                 |           |           |           |

Amendment Amount Allocation

Return to General Information

Internal Notes

Save

Return to Search

Notify

12. The **Amendment Billing Allocation** tab page displays. In the **Contract Billing** section, enter the **Total Billing Adjustment** amount, the amount that is going to increase/decrease, i.e. 25,000.
13. In **Contract Line Pricing** section, enter the updated new Total Award amount in the **New Total Amount** in the New Billing Amount field.
14. Select the **blue Recalculate** button. The Fixed Billing Allocation status will change from 'Incomplete' to 'Complete'. Note: the **'New Billing Amount'** should equal the **'Total Billing After Adjustment'**. (If necessary, in the Contract Line Pricing section, uncheck the **Adjust Billing Retroactively** checkbox and the **Adjust Revenue Retroactively** checkbox and select the White **Recalculate** box).
15. Select the **Save** button.
16. You may get a warning message that the Accounting Distribution does not match. Select **OK** and continue onto the next step to correct the Distribution amounts.

Amendment Detail

Amendment Amount Allocation

Currency USD

Amendment Reason Scope Change

Contract Billing

Total Billing Adjustment

25,000.00

12

Unallocated Billing

0.00

Total Billing After Adjustment

50,118.00

Fixed Billing

Fixed Billing Adjustment

25,000.00

Unallocated Fixed Billing

25,000.00

Discount / Surcharge

0.00

Inclusive Prepaids Adjustment

0.00

Net Adjustment

25,000.00

Allocation

Incomplete

14

Recalculate

Contract Line Pricing

1-1 of 1

Amounts

Detail

| Retrieve Billing Price   | Line Number | Product     | Current Billing Amount | New Billing Amount | Adjustment Billing Amount | Adjust Billing Retroactively | Adjust Revenue Retroactively | Reverse Amounts          | Discount/Surcharge Adjustment | New Net Billing | Simulate Billing Pricing |
|--------------------------|-------------|-------------|------------------------|--------------------|---------------------------|------------------------------|------------------------------|--------------------------|-------------------------------|-----------------|--------------------------|
| <input type="checkbox"/> | 1           | FIXED_PRICE | 50,118.00              | 75,118.00          |                           | <input type="checkbox"/>     | <input type="checkbox"/>     | <input type="checkbox"/> | 0.00                          | 50,118.00       | Simulate Billing Pricing |

Select All

Clear All

13

Recalculate

Adjustment Line Totals

|                      |      |                   |      |                    |
|----------------------|------|-------------------|------|--------------------|
| Billing Amount       | 0.00 | Recurring Billing | 0.00 |                    |
| Discounts/Surcharges | 0.00 | Billing Limit     | 0.00 | Total Billing 0.00 |

Prepays

Return to Amendment Details

15

Save

To Search

Notify

Previous tab

Next tab

!
 NOTE: Notice that after you recalculate that the Fixed Billing **Allocation** status will change from '**Incomplete**' to '**Complete**' and the **Total Billing Adjustment** will be updated.

17. Select the **Return to Amendment Details** link.

**Amendment Billing Allocation** | Amendment Revenue Allocation

Contract 0000000000000004332  
 Business Unit VIA040  
 Sold To 001002739 Corporation for Public Broadcasting  
 Currency USD  
 Amendment 0000000001  
 Amendment Type Scope Change  
 Amendment Reason Scope Change

**Contract Billing**

Total Billing Adjustment 25,000.00  
 Total Billing After Adjustment 75,118.00  
 Unallocated Billing 0.00

**Fixed Billing**

Fixed Billing Adjustment 25,000.00  
 Discount / Surcharge 0.00  
 Net Adjustment 25,000.00  
 Unallocated Fixed Billing 0.00  
 Inclusive Prepays Adjustment 0.00  
 Allocation Complete

**Contract Line Pricing**

| Retrieve Billing Price   | Line Number | Product     | Current Billing Amount | New Billing Amount | Adjustment Billing Amount | Adjust Billing Retroactively | Adjust Revenue Retroactively | Reverse Amounts          | Discount/Surcharge Adjustment | New Net Billing | Simulate Billing Pricing |
|--------------------------|-------------|-------------|------------------------|--------------------|---------------------------|------------------------------|------------------------------|--------------------------|-------------------------------|-----------------|--------------------------|
| <input type="checkbox"/> | 1           | FIXED_PRICE | 50,118.00              | 75,118.00          | 25,000.00                 | <input type="checkbox"/>     | <input type="checkbox"/>     | <input type="checkbox"/> | 0.00                          | 75,118.00       | Simulate Billing Pricing |

**Adjustment Line Totals**

| Billing Amount       | Recurring Billing | Total Billing |
|----------------------|-------------------|---------------|
| 25,000.00            | 0.00              | 25,000.00     |
| Discounts/Surcharges | Billing Limit     |               |
| 0.00                 | 0.00              |               |

**Prepays**  
 Return to Amendment Details

Save Return to Search Notify Previous tab Next tab

18. On the **Amendment Details** page, change the **Amendment Status** from 'Pending' to **'Ready'**. The **Process Amendment** button will appear.
19. Select the **Process Amendment** button.
20. The **Amendment Status** will change from **Ready** to **Complete**.

**Amendment Details**

Contract 0000000000000004339  
 Sold To Customer FIN00107  
 Amendment Number 0000000001  
 Amendment Type Scope Change  
 Amendment Reason Scope Change  
 Process Date 11/06/2023  
 \*Amendment Status Ready  
 Process Amendment

Total Billing Adjustment 5,000.00  
 Fixed Billing Adjustment 5,000.00  
 Fixed Billing Allocation Complete  
 Total Revenue Adjustment 5,000.00  
 Fixed Revenue Adjustment 5,000.00  
 Fixed Revenue Allocation Complete

Additional Amendment Details

21. A **warning** box appears, reminding you to go back and update the Billing Events.
22. Select the **OK** button.

Amendment Billing Allocation

Amendment Details

Contract

00000000000000004489

Amendment Number

0000000001

Sold To Customer

FIN00111

Amendment Completed On

03/11/2024 10:56AM

Amendment Type

Scope Change

Process Date

03/01/2024

Amendment Reason

Scope Change

Amendment Status

Complete

Total Billing Adjustment

25,000.00

Total Revenue Adjustment

25,000.00

Fixed Billing Adjustment

25,000.00

Fixed Revenue Adjustment

25,000.00

Fixed Billing Allocation

Complete

Fixed Revenue Allocation

Complete

Additional Amendment Details

Reference ID

User Ref #1

User Ref #2

Amendment Components

General

Statistics

||>

| Component           | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|---------------------|--------------|-----------------|-----------|-----------|-----------|
| 1 Amount Allocation | Line 1       | Billing Amount  | Update    | 50000     | 75000     |
| 2 Amount Allocation | Line 1       | Revenue Amount  | Update    | 50000     | 75000     |

Return to General Information

Internal Notes

Save

Return to Search

Notify

Warning -- The bill plan is on hold since the event total does not equal the negotiated amount.

Either adjust the amount or the percentage on the event to correct the problem and then deselect the Hold flag before processing.

OK

23. The **Amendment Status** will then be **Complete**. Select the **Save** button.
24. Select the **Return to General Information** link.

Amendment Details

Contract

00000000000000004332

Amendment Number

0000000001

Sold To Customer

001002739

Amendment Completed On

01/29/2024 7:25AM

Amendment Type

Scope Change

Process Date

01/23/2024

Amendment Reason

Scope Change

Amendment Status

Complete

Total Billing Adjustment

25,000.00

Total Revenue Adjustment

25,000.00

Fixed Billing Adjustment

25,000.00

Fixed Revenue Adjustment

25,000.00

Fixed Billing Allocation

Complete

Fixed Revenue Allocation

Complete

Additional Amendment Details

Reference ID

User Ref #1

User Ref #2

Amendment Components

General

Statistics

||>

| Component           | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|---------------------|--------------|-----------------|-----------|-----------|-----------|
| 1 Amount Allocation | Line 1       | Billing Amount  | Update    | 50118     | 75118     |
| 2 Amount Allocation | Line 1       | Revenue Amount  | Update    | 50118     | 75118     |

Return to General Information

Internal Notes

Save

Return to Search

Notify

25. On the **General Information** page, select the **Lines** tab.
26. On the **Lines** tab, select the **Detail** tab.
27. Select the Billing Plan **Ready** link. The **Define Billing Plan** page will display.

General **Lines** Amendments

Contract Number 0000000000000004332 Sold To Customer Corporation for Public Broadcasting  
Amendment Number 000000001 Contract Status ACTIVE

Amend Contract

Contract Lines ⓘ

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    | FIXED_PRICE | Fixed Price Contracts | Amount     | Ready        | Billing Manages Revenue | Contract Terms | Distribution | Internal Notes | Corporation for Public Bro |

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

28. On the **Events** tab in the Amount Detail section, note the Remaining Amount.
29. Select the **plus icon [ + ]** to add a new event. Enter the number of rows to add and select **OK**.
30. Enter a Select a new **Event Date** and enter the increase/decrease amount (**Remaining Amount**) to a new event.
31. Change the **Event Status** from 'Pending' to 'Ready'.
32. Select the **Save** button.

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

Contract 0000000000000004332 BI Unit WA040  
Sold To Customer 001002739 Corporation for Public Broadcasting Bill To 001002739 Corporation for Public Broadcasting  
Billing Plan ◀ B101 ▶ Fixed Price Contract Currency USD

**Define Events**

☐ Percent  
☒ Amount  
Add Milestone

**Amount Detail**

|                  |           |
|------------------|-----------|
| Total Amount     | 75,118.00 |
| Remaining Amount | 25,000.00 |

Event Detail Personalize Find First 1-2 of 2 Last

| Event | Actions   | Event Type | *Event Status | Event Date | Event Note | Amount    |
|-------|-----------|------------|---------------|------------|------------|-----------|
| 1     | ▼ Actions | Date       | Ready         | 06/30/2024 |            | 50,118.00 |
| 2     | ▼ Actions | Date       | Pending       | 06/30/2024 |            | 25000.00  |

Return to General Information

Save Return to Search Notify Add Update/Display

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

33. Select the **Billing Plan General** tab.
34. Deselect the **Hold** checkbox.
35. Select the **Save** button.





## \* UPDATE IN PROCESS below this line \* Thank you for your patience

### Amend the Billing Limit When the Billing Plan is 'In Progress' (already invoiced)

#### Navigation: Customer Contracts > Create and Amend > Define Contract General Info

1. On the **General Information** search page, select the **Find an Existing Value** tab.
2. Enter or look up the **Business Unit**.
3. Enter or look up the **Contract** to be amended. Select **Search**.
4. The **General Information** page will display. Select the **Lines** tab.
5. Select the **Detail** tab to verify the **Billing Plan** status. If Billing Plan = 'In Progress' that means the FPC Award has been invoiced already.
6. Select the **Amend Contract** button.

General | **Lines** | Amendments

Contract Number 00000000000000004332  
Amendment Number 0000000002  
Sold To Customer Corporation for Public Broadcasting  
Contract Status ACTIVE

[Amend Contract](#)

**Contract Lines** ?

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

| Actions   | Line | Product     | Description           | Price Type | Billing Plan | Revenue Plan            | Contract Terms | Accounting   |
|-----------|------|-------------|-----------------------|------------|--------------|-------------------------|----------------|--------------|
| ▼ Actions | 1    | FIXED_PRICE | Fixed Price Contracts | Amount     | In Progress  | Billing Manages Revenue | Contract Terms | Distribution |

Billing Plans | Revenue Plans | Milestones | Renewals | Supplemental Data | Go To | More

[Save](#) | [Return to Search](#) | [Notify](#)

General | Lines | Amendments

7. The **Amendments** tab appears. Under the **Amendments** section, select from the drop down arrows the **Amendment Type** and **Reason**.
8. Select the **Save** button. Notice the Amendment Status = **Pending**.
9. Select the newly added amendment row **Detail** link. The **Amendment Details** page will display.

General

Lines

Amendments

Contract Number

0000000000000004332

Sold To Customer

Corporation for Public Broadcasting

Pending Amendment

0000000003

Contract Status

ACTIVE

View Current

Amendments

Q

1-4 of 4

View All

General

Statistics

Billing Amended Amounts

Revenue Amended Amounts

Misc.

II>

| Amendment  | Amendment Type | Reason       | Process Date | Amendment Status | Detail                 | Notes                 |
|------------|----------------|--------------|--------------|------------------|------------------------|-----------------------|
| 0000000002 | Scope Change   | Scope Change | 01/29/2024   | Complete         | <a href="#">Detail</a> | <a href="#">Notes</a> |
| 0000000001 | Scope Change   | Scope Change | 01/23/2024   | Complete         | <a href="#">Detail</a> | <a href="#">Notes</a> |
| 0000000000 |                |              | 09/13/2023   | Complete         | <a href="#">Detail</a> | <a href="#">Notes</a> |
| 0000000003 | Scope Change   | Scope Change | 01/29/2024   | Pending          | <a href="#">Detail</a> | <a href="#">Notes</a> |

Billing Plans

Revenue Plans

Milestones

Renewals

Amount Allocation

Supplemental Data

Go To

More

Save

Return to Search

Notify

General

Lines

Amendments

10. The **Amendment Details** page displays. Increase or Decrease the **Fixed Billing Adjustment** amount as needed.
11. Select the **Save** button. Select the **Amendment Amount Allocation** hyperlink.

Amendment Details

Contract

0000000000000004332

Amendment Number

0000000003

Sold To Customer

001002739

Amendment Type

Scope Change

\*Process Date

01/29/2024

Amendment Reason

Scope Change

\*Amendment Status

Pending

Total Billing Adjustment

0.00

Total Revenue Adjustment

0.00

Fixed Billing Adjustment

50,000.00

Fixed Revenue Adjustment

50,000.00

Fixed Billing Allocation

Incomplete

Fixed Revenue Allocation

Incomplete

Additional Amendment Details

Reference ID

User Ref #1

User Ref #2

Amendment Components

Q

General

Statistics

II>

| Component | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|-----------|--------------|-----------------|-----------|-----------|-----------|
| 1         |              |                 |           |           |           |

Amendment Amount Allocation

Return to General Information

Internal Notes

Save

Return to Search

Notify

12. The **Amendment Billing Allocation** tab page displays. In the **Contract Billing** section, enter the **Total Billing Adjustment** amount, the amount that is going to increase/decrease, i.e. 50,000.
13. In **Contract Line Pricing** section, enter the updated new Total Award amount in the **New Total Amount** in the New Billing Amount field.
14. Select the **blue Recalculate** button. The Fixed Billing Allocation status will change from 'Incomplete' to 'Complete'. Note: the '**New Billing Amount**' should equal the '**Total Billing After Adjustment**'. (If necessary, in the Contract Line Pricing section, uncheck the **Adjust Billing Retroactively** checkbox and the **Adjust Revenue Retroactively** checkbox and select the White **Recalculate** box).
15. Select the **Save** button. You may get a warning message that the Accounting Distribution does not match. Select **OK** and continue onto the next step to correct the Distribution amounts.

**NOTE:** Notice that after you recalculate that the Fixed Billing **Allocation** status will change from '**Incomplete**' to '**Complete**' and the **Total Billing Adjustment** will be updated.

16. Select the **Return to Amendment Details** link.

**Contract Billing**

|                                |            |                     |      |
|--------------------------------|------------|---------------------|------|
| Total Billing Adjustment       | 50,000.00  | Unallocated Billing | 0.00 |
| Total Billing After Adjustment | 150,118.00 |                     |      |

**Fixed Billing**

|                          |           |                              |          |
|--------------------------|-----------|------------------------------|----------|
| Fixed Billing Adjustment | 50,000.00 | Unallocated Fixed Billing    | 0.00     |
| Discount / Surcharge     | 0.00      | Inclusive Prepays Adjustment | 0.00     |
| Net Adjustment           | 50,000.00 | Allocation                   | Complete |

**Contract Line Pricing**

| Retrieve Billing Price   | Line Number | Product     | Current Billing Amount | New Billing Amount | Adjustment Billing Amount | Adjust Billing Retroactively | Adjust Revenue Retroactively | Reverse Amounts          | Discount/Surcharge Adjustment | New Net Billing |
|--------------------------|-------------|-------------|------------------------|--------------------|---------------------------|------------------------------|------------------------------|--------------------------|-------------------------------|-----------------|
| <input type="checkbox"/> | 1           | FIXED_PRICE | 100,118.00             | 150,118.00         | 50,000.00                 | <input type="checkbox"/>     | <input type="checkbox"/>     | <input type="checkbox"/> | 0.00                          | 150,118.00      |

**Adjustment Line Totals**

|                      |           |                   |           |
|----------------------|-----------|-------------------|-----------|
| Billing Amount       | 50,000.00 | Recurring Billing | 0.00      |
| Discounts/Surcharges | 0.00      | Billing Limit     | 0.00      |
|                      |           | Total Billing     | 50,000.00 |

**Prepays**

[Return to Amendment Details](#)

**Save** **Go to Search** **Notify** **Previous tab** **Next tab**

17. On the **Amendment Details** page, change the **Amendment Status** from 'Pending' to '**Ready**'. The **Process Amendment** button will appear.
18. Select the **Process Amendment** button.
19. The **Amendment Status** will change from **Ready** to **Complete**.

Amendment Type

Scope Change

Amendment Reason

Scope Change

Total Billing Adjustment

50,000.00

Fixed Billing Adjustment

50,000.00

Fixed Billing Allocation

Complete

\*Process Date

01/29/2024

\*Amendment Status

Pending

Cancelled

Pending

Ready

Total Revenue Adjustment

Fixed Revenue Adjustment

50,000.00

Fixed Revenue Allocation

Complete

Amendment Details

Contract

0000000000000004332

Sold To Customer

001002739

Amendment Number

0000000003

Amendment Type

Scope Change

Amendment Reason

Scope Change

Process Date

01/29/2024

\*Amendment Status

Ready

Process Amendment

Total Billing Adjustment

50,000.00

Fixed Billing Adjustment

50,000.00

Fixed Billing Allocation

Complete

Total Revenue Adjustment

50,000.00

Fixed Revenue Adjustment

50,000.00

Fixed Revenue Allocation

Complete

Additional Amendment Details

Reference ID

User Ref #1

User Ref #2

Amendment Components

General

Statistics

1-2 of 2

View All

| Component           | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|---------------------|--------------|-----------------|-----------|-----------|-----------|
| 1 Amount Allocation | Line 1       | Billing Amount  | Update    | 100118    | 150118    |
| 2 Amount Allocation | Line 1       | Revenue Amount  | Update    | 100118    | 150118    |

Return to General Information

Internal Notes

Save

Return to Search

Notify

!

If you receive a warning message about the bill plan being partially processed. Select the **OK** button and go back to the **Bill Plan Events**. If you need help at this point, please submit a [service desk ticket](#).

20. Select the **OK** button.

Amendment Details

Contract0000000000000004332

Amendment Number000000003

Sold To Customer001002739

Amendment TypeScope Change

Process Date01/29/2024

Amendment ReasonScope Change

\*Amendment StatusReady

Process Amendment

Total Billing Adjustment50,000.00

Total Revenue Adjustment50,000.00

Fixed Billing Adjustment50,000.00

Fixed Revenue Adjustment50,000.00

Fixed Billing AllocationComplete

Fixed Revenue AllocationComplete

Additional Amendment Details

Reference ID

Amendment status cannot be set to Ready under the current conditions for contract line 1 (9852,254)  
A contract line amount cannot be amended as one or more billing plan events have been only partially processed (event status is Recycled, In Progress, Reversal Initiated, or Reversal in Progress). Finish processing the partially processed billing plan events before amending the contract line.

OK

Amendment Components

General

Statistics

| Component           | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|---------------------|--------------|-----------------|-----------|-----------|-----------|
| 1 Amount Allocation | Line 1       | Billing Amount  | Update    | 100118    | 150118    |
| 2 Amount Allocation | Line 1       | Revenue Amount  | Update    | 100118    | 150118    |

Return to General Information

Internal Notes

SaveReturn to SearchNotify

24. The **Amendment Status** will then be **Complete**. Select the **Save** button.
25. Select the **Return to General Information** link.

!

\*\*\* QRG WORK IN PROGRESS below this line \*\*\* Appreciate your patience

Amendment Details

Contract0000000000000004329

Amendment Number000000001

Sold To Customer001002739

Amendment Completed On01/04/2024 11:11AM

Amendment TypeScope Change

Process Date01/04/2024

Amendment ReasonScope Change

Amendment StatusComplete

Total Billing Adjustment50,000.00

Total Revenue Adjustment50,000.00

Fixed Billing Adjustment50,000.00

Fixed Revenue Adjustment50,000.00

Fixed Billing AllocationComplete

Fixed Revenue AllocationComplete

Additional Amendment Details

Reference ID

User Ref #1

User Ref #2

Amendment Components

General

Statistics

| Component           | Amend Ref #1 | Label Fieldname | Edit Type | Old Value | New Value |
|---------------------|--------------|-----------------|-----------|-----------|-----------|
| 1 Amount Allocation | Line 1       | Billing Amount  | Update    | 26886     | 76886     |
| 2 Amount Allocation | Line 1       | Revenue Amount  | Update    | 26886     | 76886     |

Return to General Information

Internal Notes

SaveReturn to SearchNotify

28. On the **General Information** page, select the **Lines** tab.
29. On the **Lines** tab, select the **Detail** tab.
30. Select the **Action Required** link in the **Billing Plan** column. The **Define Billing Plan** page will display.

\*\*\* Steps to be added - in theory, 1 billing needs to be have completed prior amendment.

Contract Number: 000000000000000004329  
 Amendment Number: 0000000001  
 Sold To Customer: Corporation for Public Broadcasting  
 Contract Status: ACTIVE

Amend Contract

**Contract Lines** ⓘ

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

| Actions   | Line | Product     | Description           | Price Type | Billing Plan | Revenue Plan            | Contract Terms | Accounting   | Internal Notes |
|-----------|------|-------------|-----------------------|------------|--------------|-------------------------|----------------|--------------|----------------|
| ▼ Actions | 1    | FIXED_PRICE | Fixed Price Contracts | Amount     | Pending      | Billing Manages Revenue | Contract Terms | Distribution | Internal Notes |
| ▼ Actions | 2    | FIXED_PRICE | Fixed Price Contracts | Amount     | Pending      | Billing Manages Revenue | Contract Terms | Distribution | Internal Notes |

Billing Plans | Revenue Plans | Milestones | Renewals | Supplemental Data | Go To: More

Return to Project General

Save | Return to Search | Notify

General | Lines | Amendments

Contract Number: 000000000000000000273  
 Amendment Number: 0000000003  
 Sold To Customer: Spokane County  
 Contract Status: ACTIVE

Amend Contract

**Contract Lines** ⓘ

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    | FIXED_PRICE | Fixed Price Contracts | Amount     | Action Required | Billing Manages Revenue | Contract Terms | Distribution | Internal Notes | Spokane County        |

Billing Plans | Revenue Plans | Milestones | Renewals | Supplemental Data | Go To: More

Personalize | Find | View All | First | 1 of 1 | Last

31. On the **Events** tab in the Amount Detail section, note the Remaining Amount.
32. Select a new **Event Date** and enter the increase/decrease amount (**Remaining Amount**) to a new event.
33. Change the **Event Status** from 'Pending' to 'Ready'.
34. Select **Save**.
35. Return to **General Information**.

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

Contract 0000000000000000273 BI Unit WA170  
Sold To Customer FN00114 Spokane County Bill To 001000430 Spokane County Community Services  
Billing Plan B101 Fixed Price Contract Currency USD

**Define Events**

☐ Percent  
☒ Amount  
Add Milestone

**Amount Detail**

Total Amount 13,000.00  
**Remaining Amount 1,000.00**

**Event Detail**

| Event | Actions | Event Type | *Event Status | Event Date | Event Note | Amount   |
|-------|---------|------------|---------------|------------|------------|----------|
| 1     | Actions | Date       | Completed     | 01/31/2017 | Event Note | 124.24   |
| 2     | Actions | Date       | Completed     | 02/28/2017 | Event Note | 118.48   |
| 3     | Actions | Date       | Completed     | 04/30/2017 | Event Note | 432.14   |
| 4     | Actions | Date       | Completed     | 06/22/2017 | Event Note | 37.32    |
| 5     | Actions | Date       | Completed     | 07/31/2017 | Event Note | 74.00    |
| 6     | Actions | Date       | Completed     | 05/18/2017 | Event Note | 321.62   |
| 8     | Actions | Date       | Ready         | 01/05/2018 | Event Note | 1,000.00 |
| 9     | Actions | Date       | Ready         | 01/04/2018 | Event Note | 8,892.20 |
| 10    | Actions | Date       | Ready         | 01/05/2018 | Event Note | 1,000.00 |
| 11    | Actions | Date       | Pending       | 01/05/2018 | Event Note | 1000.00  |

Return to General Information

Save Return to Search Notify Add Update/Dis

36. On the **Lines** tab, select the **Distribution** hyperlink.

General | **Lines** | Amendments

Contract Number 0000000000000000273 Sold To Customer Spokane County  
Amendment Number 0000000003 Contract Status ACTIVE

Amend Contract

**Contract Lines**

| Actions | Line | Product     | Description           | Price Type | Billing Plan    | Revenue Plan            | Contract Terms | Accounting          | Internal Notes | Ship to Customer Name |
|---------|------|-------------|-----------------------|------------|-----------------|-------------------------|----------------|---------------------|----------------|-----------------------|
| Actions | 1    | FIXED_PRICE | Fixed Price Contracts | Amount     | Action Required | Billing Manages Revenue | Contract Terms | <b>Distribution</b> | Internal Notes | Spokane County        |

Billing Plans Revenue Plans Milestones Renewals Supplemental Data Go To More

37. Select the **Correct History** button then adjust the **Revenue Amount** to the newly total amended amount.
38. Select **Save**.
39. Return to the **General Information**.



Total **Revenue Amount** should equal Total **Billing Amount**.



**Accounting Distribution**

Spokane County

Contract 00000000000000000273      Line Num 1      Description Fixed Price Contracts

---

Billing Amount 13,000.00      Revenue Amount 13,000.00      Unit WA170      Currency USD

**Accounting Distributions**      Find | View All      First 1 of 1 Last

\*Effective Date 12/01/2016      Define Distributions By  
☐ Percent  
☒ Amount

---

**Revenue**      Personalize | Find | View All      First 1 of 1 Last

| Revenue Amount | GL Unit | Distribution Code | Account | Oper Unit | Fund | Dept  | Program | Class | Bud Ref |
|----------------|---------|-------------------|---------|-----------|------|-------|---------|-------|---------|
| 12,000.00      | WA170   |                   | 375400  | 7171      | 145  | 10516 |         | 111   |         |

---

**Unbilled AR**      Personalize | Find | View All      First 1 of 1 Last

| Billing Amount | Revenue Amount | GL Unit | Distribution Code | Account | Oper Unit | Fund | Dept  | Program | Class |
|----------------|----------------|---------|-------------------|---------|-----------|------|-------|---------|-------|
| 13,000.00      | 13,000.00      | WA170   |                   | 101318  | 7171      | 145  | 10516 |         | 111   |

[Return to General Information](#)

Save    Return to Search    Notify    Update/Display    Include History    **Correct History**

40. Return to the **Billing Plan General** tab.
41. Select the **Reviewed** button (you should notice that the billing status change to "In Progress").
42. Select **Save**.

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

Contract 00000000000000000273      BI Unit WA170      Bill To 001000430      Spokane County Community Services

Sold To Customer FIN00114      Spokane County      Fixed Price Contract      Currency USD

Billing Plan B101      Description Fixed Price Contract      \*Billing Status Action Required      **Reviewed**

Billing Method Milestone      Actions      Hold

---

**Customer Information**

BI Unit WA170      COMMUNITY COLLEGES OF SPOKANE

\*Bill To Customer 001000430      Spokane County Community Services

Addr Num 1      Bill To Contact

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**Amount Detail**

|                       |           |
|-----------------------|-----------|
| Billing Amount        | 13,000.00 |
| Total Amount          | 13,000.00 |
| Total Billing History | 1,107.80  |
| Events Billed To Date | 1,107.80  |

---

**Billing Options**

Bill Type CA      ☐ Pre Approved

Bill Source CONTRACTS      ☐ Direct Invoice

Summarization Template ID SUM\_DESCR      Summary by Description

Billing Header Note      Internal Notes      Preview Summarization Template

---

**Billing Default Overrides**

Invoice Form XP\_PS/CA      View Customer Defaults

Cycle ID ON-DEMAND      Contract

Bill By ID CONTRACT      Payment Method Check

Payment Terms NET30      Due in 30 Days

Billing Inquiry 509-434-5228      Billing Specialist BISPEC      Billing Specialist

[Return to General Information](#)

Save    Return to Search    Notify    Add    Update/Display

43. Process complete.

## Video Tutorial

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



VIDEO COMING SOON!

## Video Tutorial via Panopto

View the link to Fixed Contract Billing Limit Amendment. This link will open in a new tab/window.