

**Updating a Federal Contract Status Overview**

Contract Status provides a visual indicator of where your contract is in the contract life cycle, and it designates when a contract is available for lookup and processing. It is a user-defined value that controls what processing can occur against the contract.

The Contract Status defaults to **Pending** when a contract is created. You can select a different contract status on the **General Information** page. When changing the Contract Status, you can only move forward. Once the status is set to **Active**, it cannot be set back to **Pending**, and once **Closed** it cannot go back to **Active**. Once a Contract Status is set to **Closed**, you can only reactivate it via the Help Desk.

If you select a Contract Status that is mapped to a different contract **Processing Status**, the system performs edit checking to ensure that the contract is eligible for the new status that you selected.

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### Federal Contract Statuses

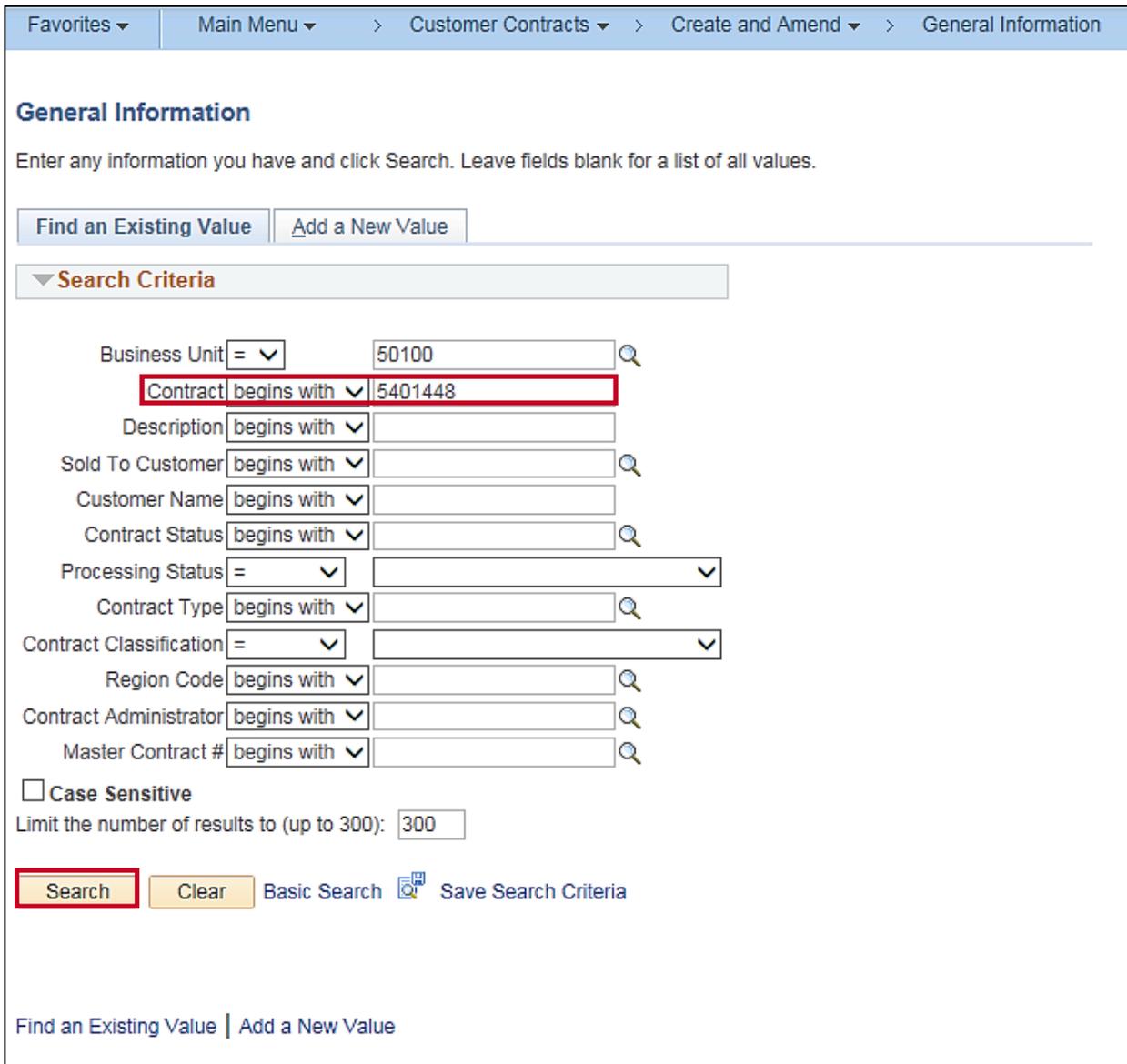
Status	Use
<b>PENDING</b>	Default status when you create a new contract and indicates that the contract was created and some data was entered. No downstream processing is allowed for the contract.
<b>ACTIVE</b>	All contract data is entered and has passed system data validation and has an Active Processing Status. Controlled data fields are available for entry only through amendment processing. Downstream processing is allowed for the contract.
<b>CLOSED</b>	The contract is no longer available for processing and data fields cannot be entered or amended. No downstream processing is allowed for the contract.  Contracts in <b>CLOSED</b> status are removed from processing and views, but the historical contract data is still available for query. Once a contract is <b>CLOSED</b> , it cannot be reactivated without submitting a ticket to the Help Desk.
<b>FIRE - CLOSED*</b>	The federal project has been closed as the result of a FIRE Review. The Processing Status is Active, therefore processing can occur against this contract at a later date when project expenditures and billings have been reconciled.
<b>FV ACCEPTED</b>	The final voucher has been paid. The Processing Status is Closed, indicating the contract is no longer available for processing and data fields cannot be entered or amended.
<b>FV COMPLETED</b>	The Final Voucher has been completed for the contract; however, the Processing Status remains Active, therefore processing can occur against this contract.
<b>WITHDRAWN *</b>	The federal project has been withdrawn; however, the Processing Status remains Active, therefore processing can occur against this contract.

\* **WITHDRAWN** and **FIRE - CLOSED** were created so that the contract **Processing Status** can still be **Active**. In some cases, these contracts need to be opened again for use.

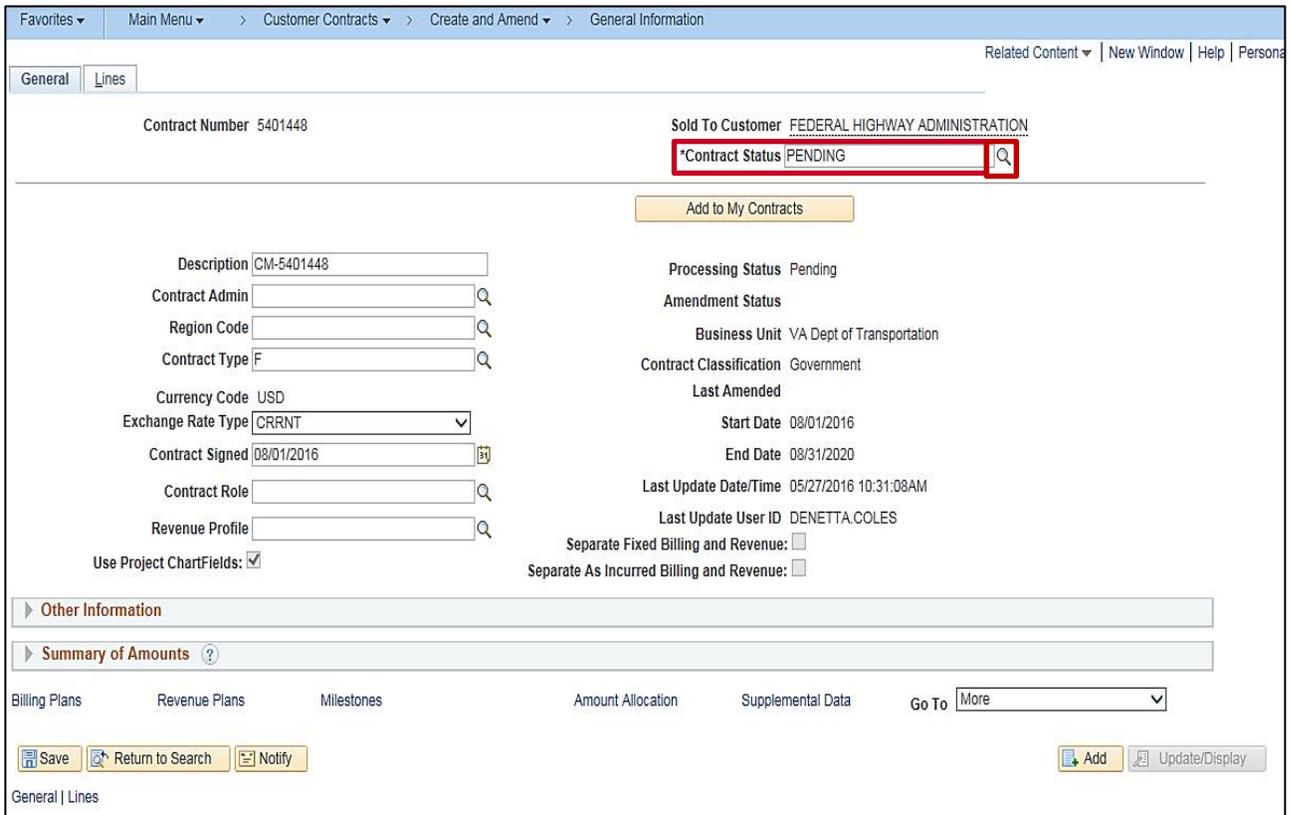
**Update Contract Status to ACTIVE, CLOSED, or FV COMPLETED**

The steps to update the **Contract Status** to **ACTIVE**, **CLOSED**, and **FV COMPLETED** are virtually the same.

1. Access the **General Information** page for the contract using the following path:  
**Main Menu > Customer Contracts > Create and Amend > General Information**



2. **Business Unit: 50100**
3. **Contract:** Enter the **Contract** number for the contract you wish to update.
4. Click the **Search** button.



Contract Number 5401448

Sold To Customer FEDERAL HIGHWAY ADMINISTRATION

**\*Contract Status PENDING**

Add to My Contracts

Description CM-5401448

Contract Admin

Region Code

Contract Type F

Currency Code USD

Exchange Rate Type CRRNT

Contract Signed 08/01/2016

Contract Role

Revenue Profile

Use Project ChartFields:

Processing Status Pending

Amendment Status

Business Unit VA Dept of Transportation

Contract Classification Government

Last Amended

Start Date 08/01/2016

End Date 08/31/2020

Last Update Date/Time 05/27/2016 10:31:08AM

Last Update User ID DENETTA.COLES

Separate Fixed Billing and Revenue:

Separate As Incurred Billing and Revenue:

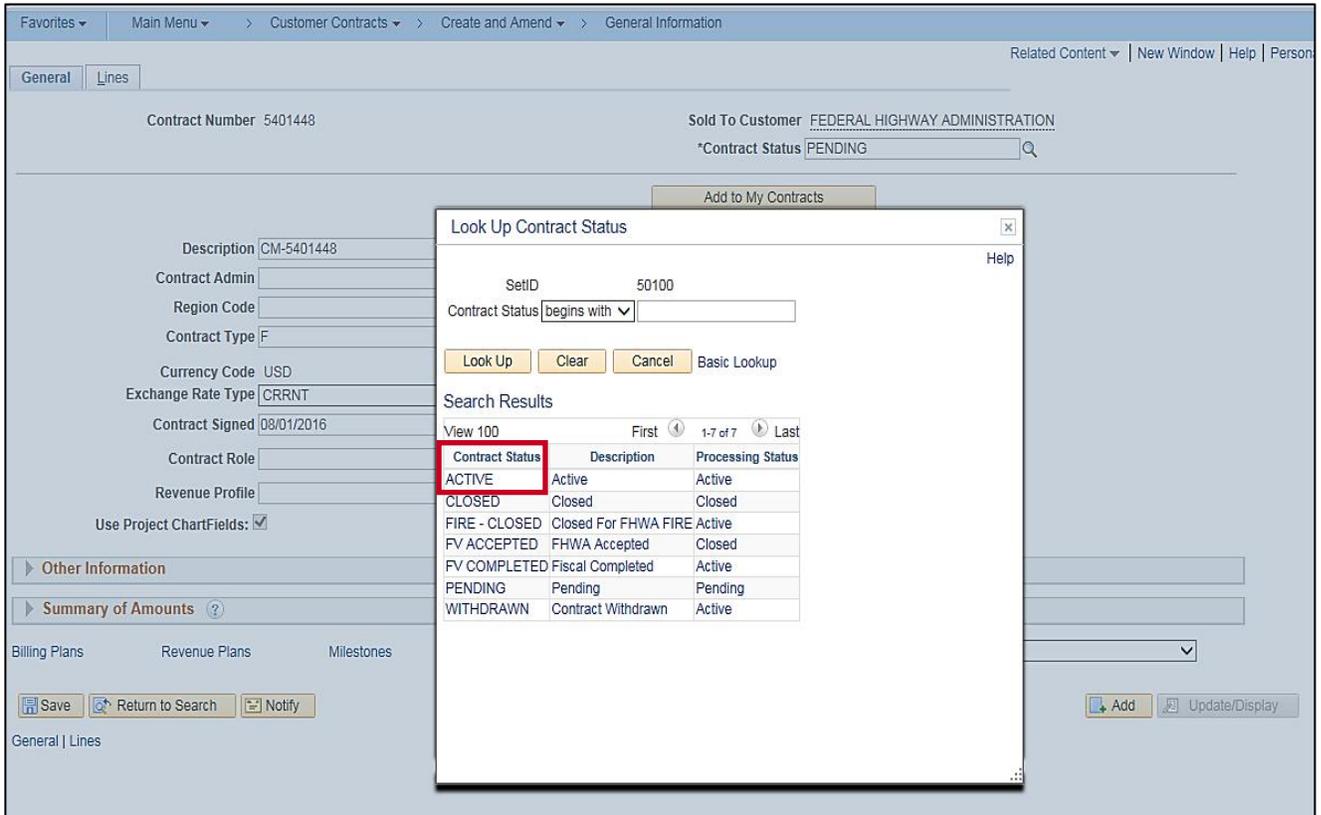
Other Information

Summary of Amounts

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

Save Return to Search Notify Add Update/Display

5. The **General Information** page, **General** tab displays.
6. In the example above the **Contract Status** is **PENDING**.
7. Click on the lookup icon next to the **Contract Status** field.



The screenshot shows a software interface for contract management. A pop-up window titled "Look Up Contract Status" is open, displaying search results for contract status. The background interface shows contract details for Contract Number 5401448, Sold To Customer FEDERAL HIGHWAY ADMINISTRATION, and Contract Status PENDING.

**Look Up Contract Status**

SetID: 50100  
 Contract Status: begins with [ ]

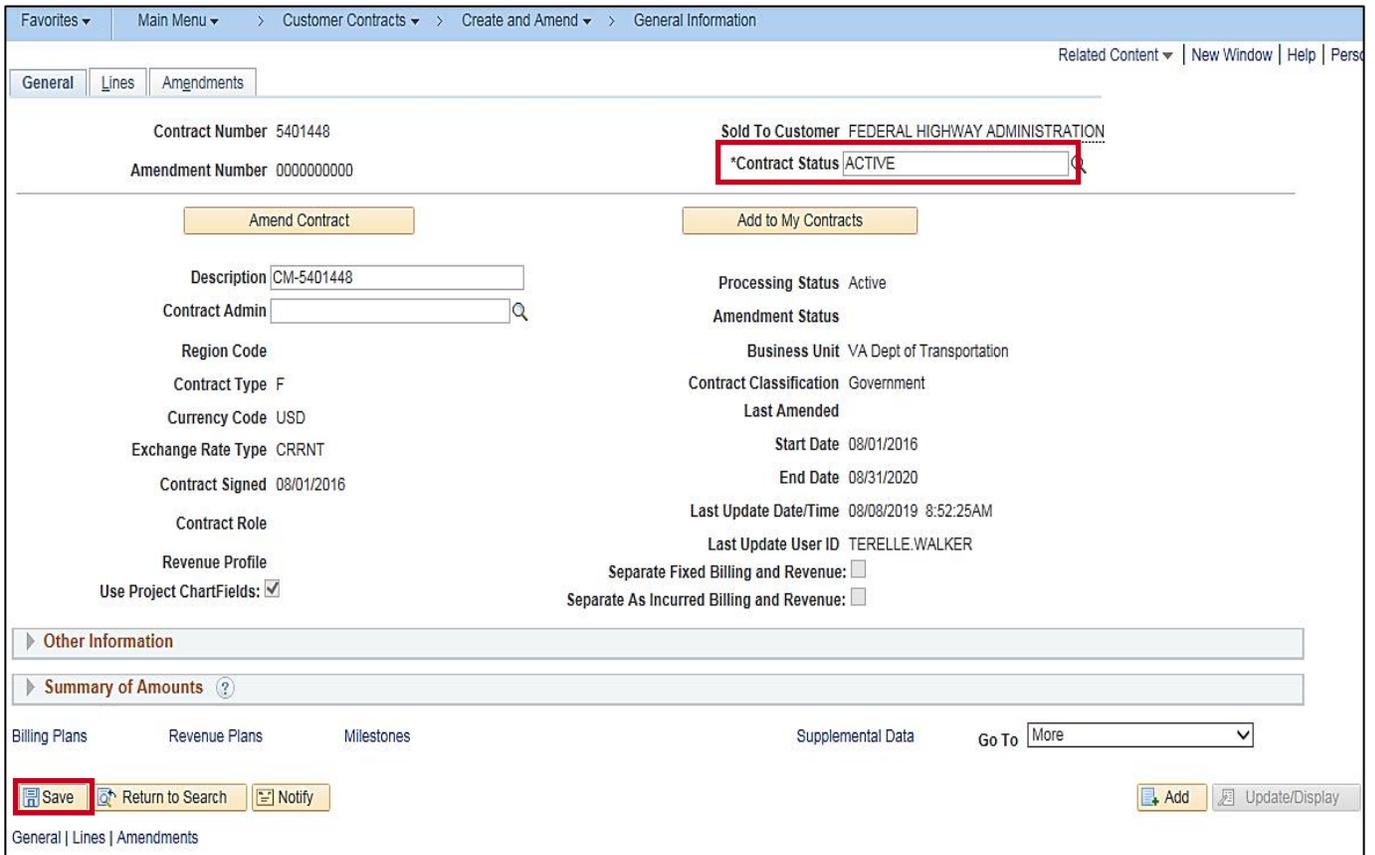
Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results

View 100 | First | 1-7 of 7 | Last

Contract Status	Description	Processing Status
ACTIVE	Active	Active
CLOSED	Closed	Closed
FIRE - CLOSED	Closed For FHWA FIRE	Active
FV ACCEPTED	FHWA Accepted	Closed
FV COMPLETED	Fiscal Completed	Active
PENDING	Pending	Pending
WITHDRAWN	Contract Withdrawn	Active

8. The **Look Up Contract Status** pop-up window displays.
9. Click on **ACTIVE**, **CLOSED**, or **FV COMPLETED**. For this scenario, **ACTIVE** is selected.



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

General | Lines | Amendments

Contract Number 5401448 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION  
 Amendment Number 0000000000 \*Contract Status ACTIVE

Amend Contract Add to My Contracts

Description CM-5401448 Processing Status Active  
 Contract Admin [Search] Amendment Status  
 Region Code Business Unit VA Dept of Transportation  
 Contract Type F Contract Classification Government  
 Currency Code USD Last Amended  
 Exchange Rate Type CRRNT Start Date 08/01/2016  
 Contract Signed 08/01/2016 End Date 08/31/2020  
 Contract Role Last Update Date/Time 08/08/2019 8:52:25AM  
 Revenue Profile Last Update User ID TERELLE.WALKER  
 Use Project ChartFields:  Separate Fixed Billing and Revenue:   
 Separate As Incurred Billing and Revenue:

▶ Other Information  
 ▶ Summary of Amounts ?

Billing Plans Revenue Plans Milestones Supplemental Data Go To More ▾

Return to Search Notify Add Update/Display

General | Lines | Amendments

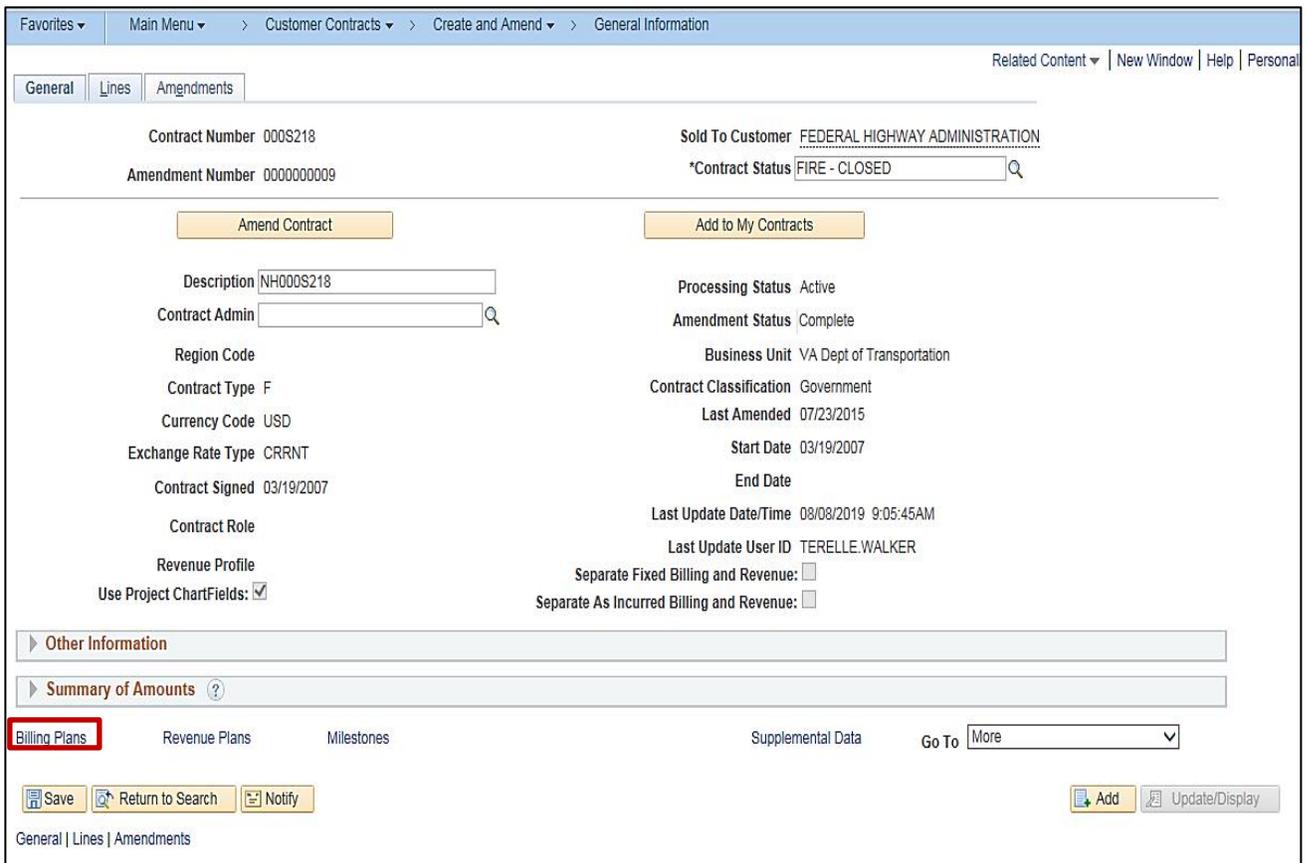
10. The **General Information** page, **General** tab displays.
11. Click the **Save** button. If the new **Contract Status** is:
  - a. **ACTIVE**: After you **Save**, the **Amend Contract** button and **Amendments** tab are now available. Changes you wish to make to the contract will need to be processed through an amendment.
  - b. **CLOSED**: After you **Save**, the **Amend Contract** button and **Amendments** tab are no longer available and the data fields cannot be modified.
  - c. **FV COMPLETED**: After you **Save**, the **Amend Contract** button and **Amendments** tab are still available. Changes you wish to make to the contract will need to be processed through an amendment.

### Update Contract Status to FIRE - CLOSED or WITHDRAWN

When setting the **Contract Status** to **FIRE – CLOSED** you may be required to lower the **Transaction Limit(s)** to the processed amount(s). Therefore, you will need to process an **Amendment** to the contract.

You will follow the same steps to update the **Contract Status** to **FIRE - CLOSED** and **WITHDRAWN**:

1. Access the contract.
2. Verify that any Amendments are processed (i.e., **Amendment Status** is **Complete**).

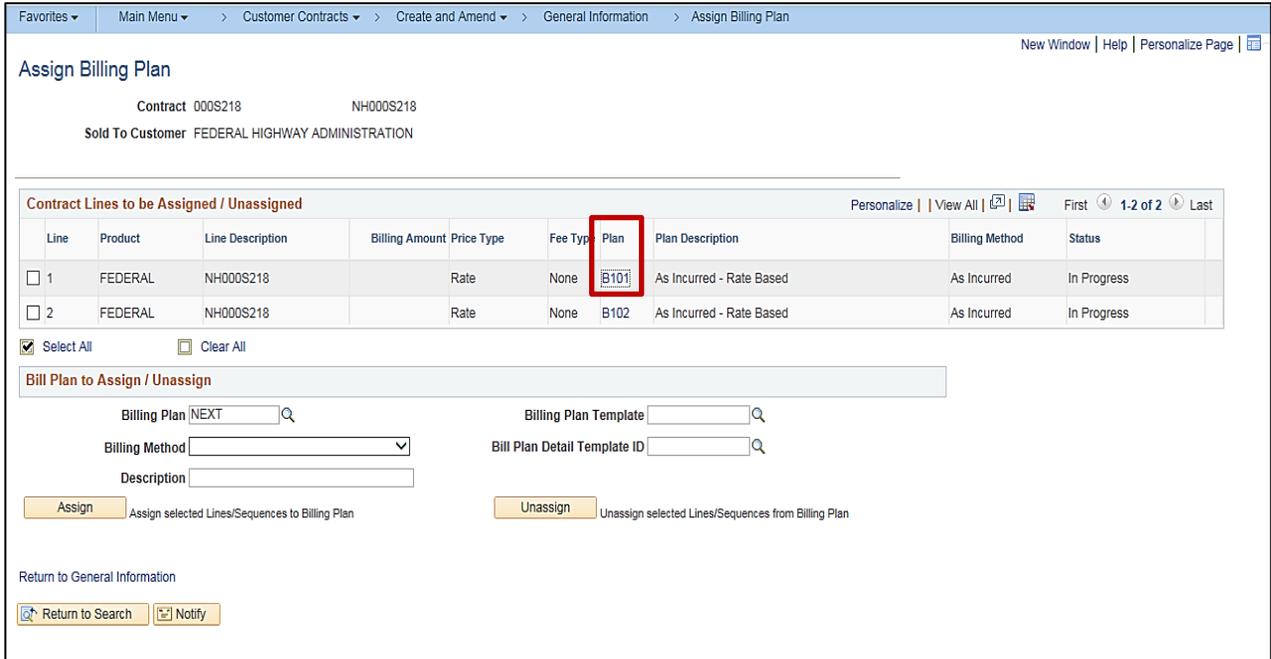


The screenshot shows a web application interface for contract management. The breadcrumb trail is: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information. The interface has tabs for General, Lines, and Amendments. The 'General' tab is active, showing contract details for Contract Number 000S218 and Amendment Number 000000009. The 'Contract Status' is set to 'FIRE - CLOSED'. The 'Amendment Status' is 'Complete'. The 'Billing Plans' link is highlighted with a red box. Other visible links include 'Amend Contract', 'Add to My Contracts', 'Other Information', and 'Summary of Amounts'. The bottom of the interface has buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

3. Click the **Billing Plans** link.

### Place the Billing Plan on Hold

Once the Billing Plan is placed on **Hold**, new billable amount (**BIL**) lines will not be created until the **Hold** has been removed. The steps to place a **Revenue Plan** on **Hold** are the same except you would choose the **Revenue Plan** related hyperlinks.



**Assign Billing Plan**

Contract 000S218 NH000S218  
Sold To Customer FEDERAL HIGHWAY ADMINISTRATION

Line	Product	Line Description	Billing Amount	Price Type	Fee Type	Plan	Plan Description	Billing Method	Status
<input type="checkbox"/> 1	FEDERAL	NH000S218		Rate	None	B101	As Incurred - Rate Based	As Incurred	In Progress
<input type="checkbox"/> 2	FEDERAL	NH000S218		Rate	None	B102	As Incurred - Rate Based	As Incurred	In Progress

Select All  Clear All

**Bill Plan to Assign / Unassign**

Billing Plan:

Billing Method:

Description:

Assign selected Lines/Sequences to Billing Plan

Unassign selected Lines/Sequences from Billing Plan

[Return to General Information](#)

- The **Assign Billing Plan** page displays.
- Click the **Bill Plan** hyperlink for the **Bill Plan** that needs to be placed on **Hold**.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Assign Billing Plan](#) > [Define Billing Plan](#)
New Window

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**Billing Plan General** | [Events](#) | [History](#)

Contract 000S218      BI Unit 50100  
 Sold To Customer 0000055002      FEDERAL HIGHWAY ADMINISTRATION      Bill To 0000055002      FEDERAL HIGHWAY ADMINISTRATION  
 Billing Plan ◀ B101 ▶      As Incurred - Rate Based      Currency USD

Description       \*Billing Status       Actions        
 Billing Method        Hold

**Customer Information**

BI Unit       VA Dept of Transportation  
 \*Bill To Customer       FEDERAL HIGHWAY ADMINISTRATION  
 Addr Num         
 Bill To Contact

**Tolerance Options**

Minimum Bill Amount   
 Final Bill

**Billing Options**

Bill Type        Pre Approved  
 Bill Source        Direct Invoice  
 Summarization Template ID       VDOT FHWA  
 Purchase Order

[Billing Header Note](#)      [Internal Notes](#)      [Preview Summarization Template](#)

**Billing Default Overrides**

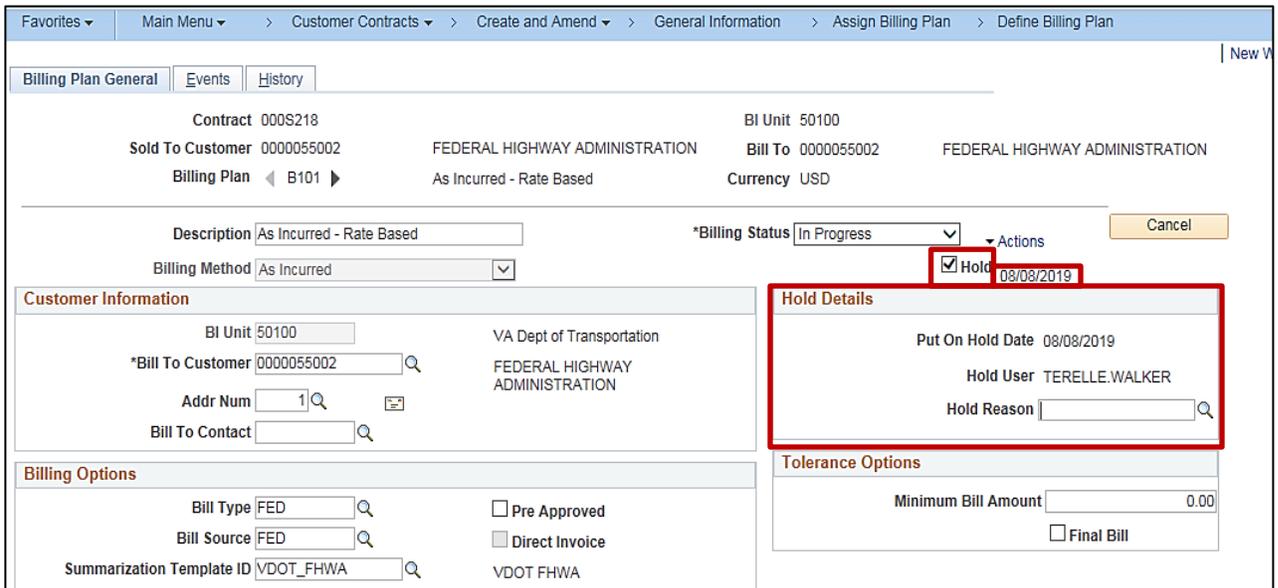
Invoice Form         
 Cycle ID             [View Customer Defaults](#)  
 Bill By ID             Project Federal  
 Payment Method         
 Payment Terms         
 Billing Inquiry         
 Billing Specialist      

[Return to Assign Billing Plan](#)

Billing Plan General | [Events](#) | [History](#)

6. The **Billing Plan General** tab displays.



Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information > Assign Billing Plan > Define Billing Plan | New V

**Billing Plan General** | Events | History

Contract 000S218 BI Unit 50100  
 Sold To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION Bill To 0000055002 FEDERAL HIGHWAY ADMINISTRATION  
 Billing Plan ◀ B101 ▶ As Incurred - Rate Based Currency USD

Description As Incurred - Rate Based \*Billing Status In Progress Actions Cancel  
 Billing Method As Incurred  Hold 08/08/2019

**Customer Information**

BI Unit 50100 VA Dept of Transportation  
 \*Bill To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION  
 Addr Num 1 Bill To Contact

**Billing Options**

Bill Type FED Pre Approved  
 Bill Source FED Direct Invoice  
 Summarization Template ID VDOT\_FHWA VDOT FHWA

**Hold Details**

Put On Hold Date 08/08/2019  
 Hold User TERELLE.WALKER  
 Hold Reason

**Tolerance Options**

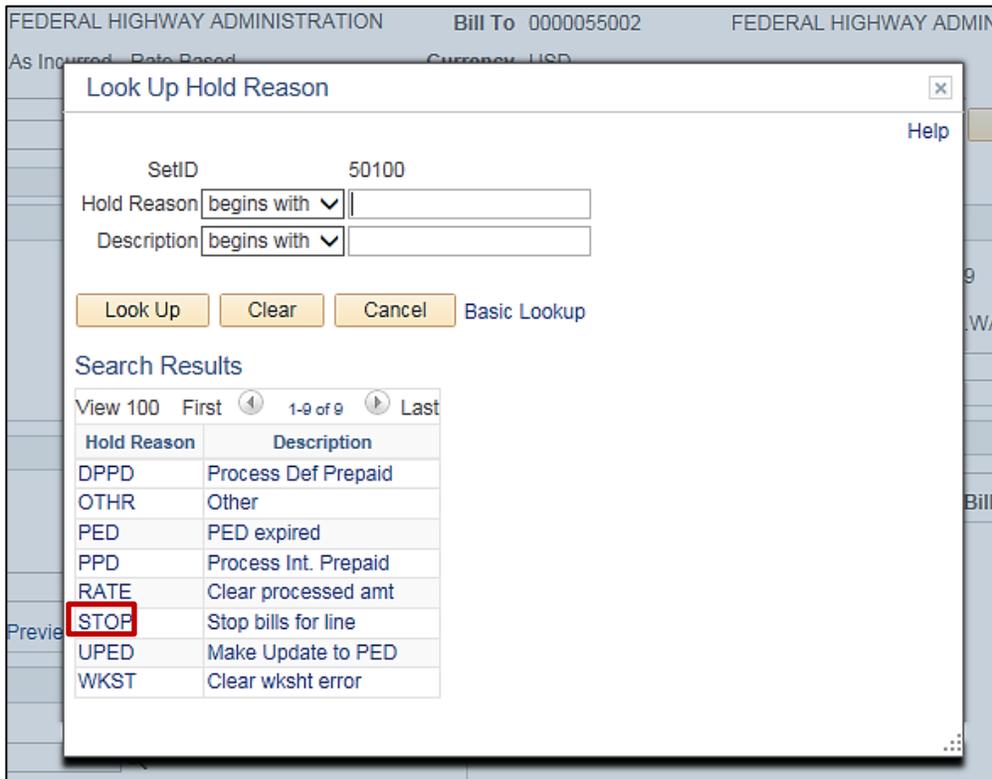
Minimum Bill Amount 0.00  
 Final Bill

7. Select the **Hold** check box under the **Billing Status**.

The date that you select this box displays to the right of the check box. This is the effective date of the **Hold**.

8. The **Hold Details** section displays, with three fields:

- a. **Put On Hold Date:** populates with the current date which matches the date that displays next to the check box.
- b. **Hold User:** populates with the name of the person who placed the Hold.
- c. **Hold Reason:** click the lookup icon to select the reason for the hold.



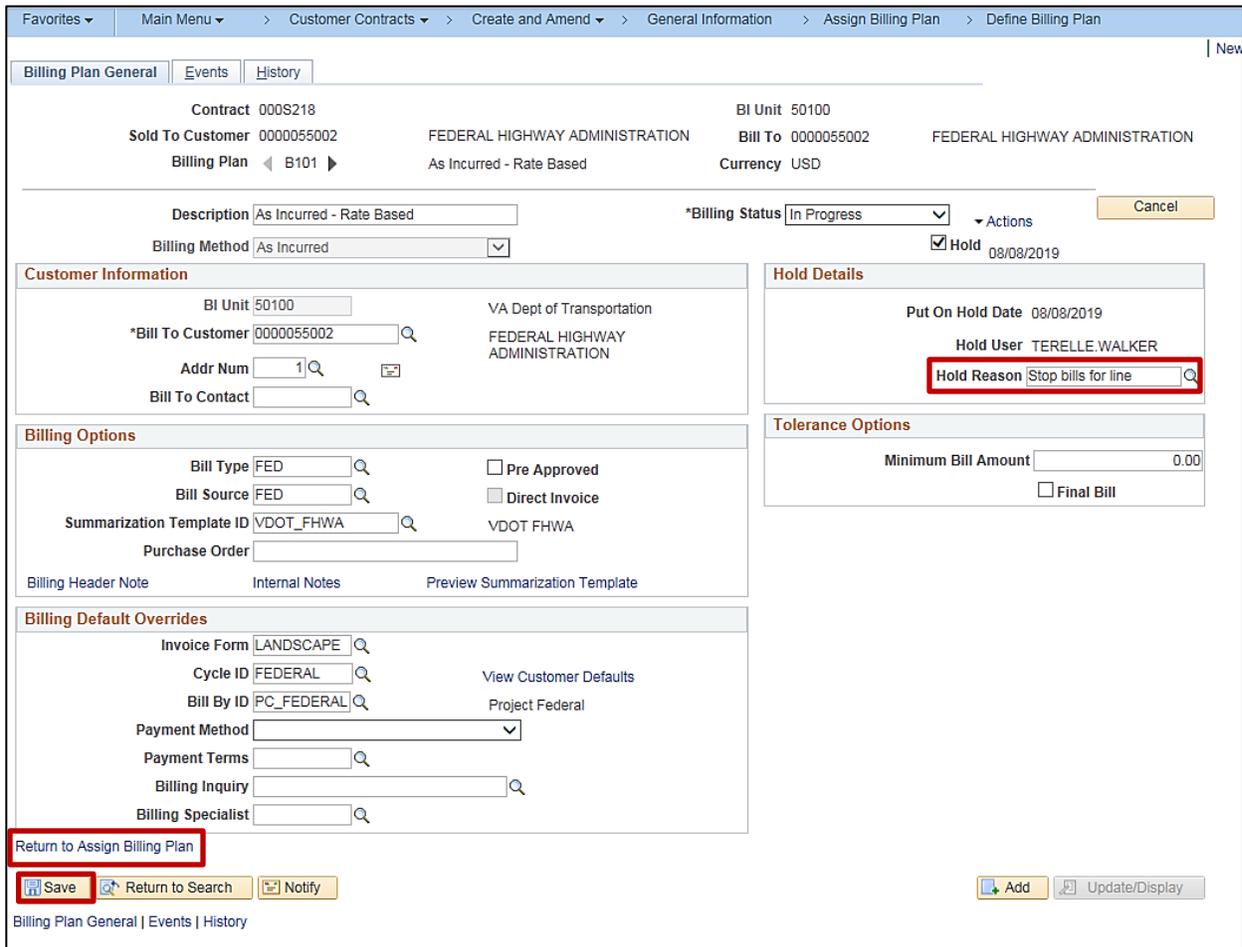
9. The **Hold Reason** pop-up window displays. See the table below for a list of Hold reasons and the Description and the Type of Contract each hold reason applies to:

Hold Reason	Description	Type of Contract
DPPD	Process Def Prepaid	Non-Federal
OTHR	Other	Federal and Non-Federal
PED	PED expired	Federal
PPD	Process Int. Prepaid	Non-Federal
RATE	Clear processed amt	Federal and Non-Federal
STOP	Stop bills for line	Federal and Non-Federal
UPED	Make Update to PED	Federal
WKST	Clear wksht error	Federal

**Note:** Be sure to select the correct hold reason based on the contract. There are no edits for this field, so if you select one that does not match with the contract type, Cardinal will not display an error message.

For this scenario, **STOP** is selected.

## PA353\_Updating a Federal Contract Status (VDOT)



Contract 000S218 BI Unit 50100  
 Sold To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION Bill To 0000055002 FEDERAL HIGHWAY ADMINISTRATION  
 Billing Plan B101 As Incurred - Rate Based Currency USD

Description As Incurred - Rate Based \*Billing Status In Progress  
 Billing Method As Incurred  Hold 08/08/2019

**Customer Information**  
 BI Unit 50100 VA Dept of Transportation  
 \*Bill To Customer 0000055002 FEDERAL HIGHWAY ADMINISTRATION  
 Addr Num 1  
 Bill To Contact

**Hold Details**  
 Put On Hold Date 08/08/2019  
 Hold User TERELLE.WALKER  
**Hold Reason** Stop bills for line

**Billing Options**  
 Bill Type FED Pre Approved  
 Bill Source FED Direct Invoice  
 Summarization Template ID VDOT\_FHWA VDOT FHWA  
 Purchase Order

**Billing Default Overrides**  
 Invoice Form LANDSCAPE  
 Cycle ID FEDERAL View Customer Defaults  
 Bill By ID PC\_FEDERAL Project Federal  
 Payment Method  
 Payment Terms  
 Billing Inquiry  
 Billing Specialist

[Return to Assign Billing Plan](#)

10. The **Hold Reason** field populates with the description for the hold selected.
11. Click the **Save** button.
12. Click the **Return to Assign Billing Plan** hyperlink.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Assign Billing Plan](#)
New Window | Help | Personalize Page

**Assign Billing Plan**

Contract 000S218      NH000S218  
 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION

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**Contract Lines to be Assigned / Unassigned** Personalize | View All | First 1-2 of 2 Last

Line	Product	Line Description	Billing Amount	Price Type	Fee Type	Plan	Plan Description	Billing Method	Status
<input type="checkbox"/> 1	FEDERAL	NH000S218		Rate	None	B101	As Incurred - Rate Based	As Incurred	In Progress
<input type="checkbox"/> 2	FEDERAL	NH000S218		Rate	None	B102	As Incurred - Rate Based	As Incurred	In Progress

Select All     Clear All

**Bill Plan to Assign / Unassign**

Billing Plan    
 Billing Method    
 Description

Billing Plan Template    
 Bill Plan Detail Template ID

Assign selected Lines/Sequences to Billing Plan   
  Unassign selected Lines/Sequences from Billing Plan

13. The **Assign Billing Plan** page displays.
14. Click the **Return to General Information** hyperlink.
15. The **General Information** page, **General** tab displays.

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

Related Content ▾ | New Window | Help | Person

General **Lines** Amendments

Contract Number 000S218 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION  
Amendment Number 000000009 Contract Status ACTIVE

Amend Contract

**Contract Lines** ? Personalize | Find | View All |  First 1-2 of 2 Last

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

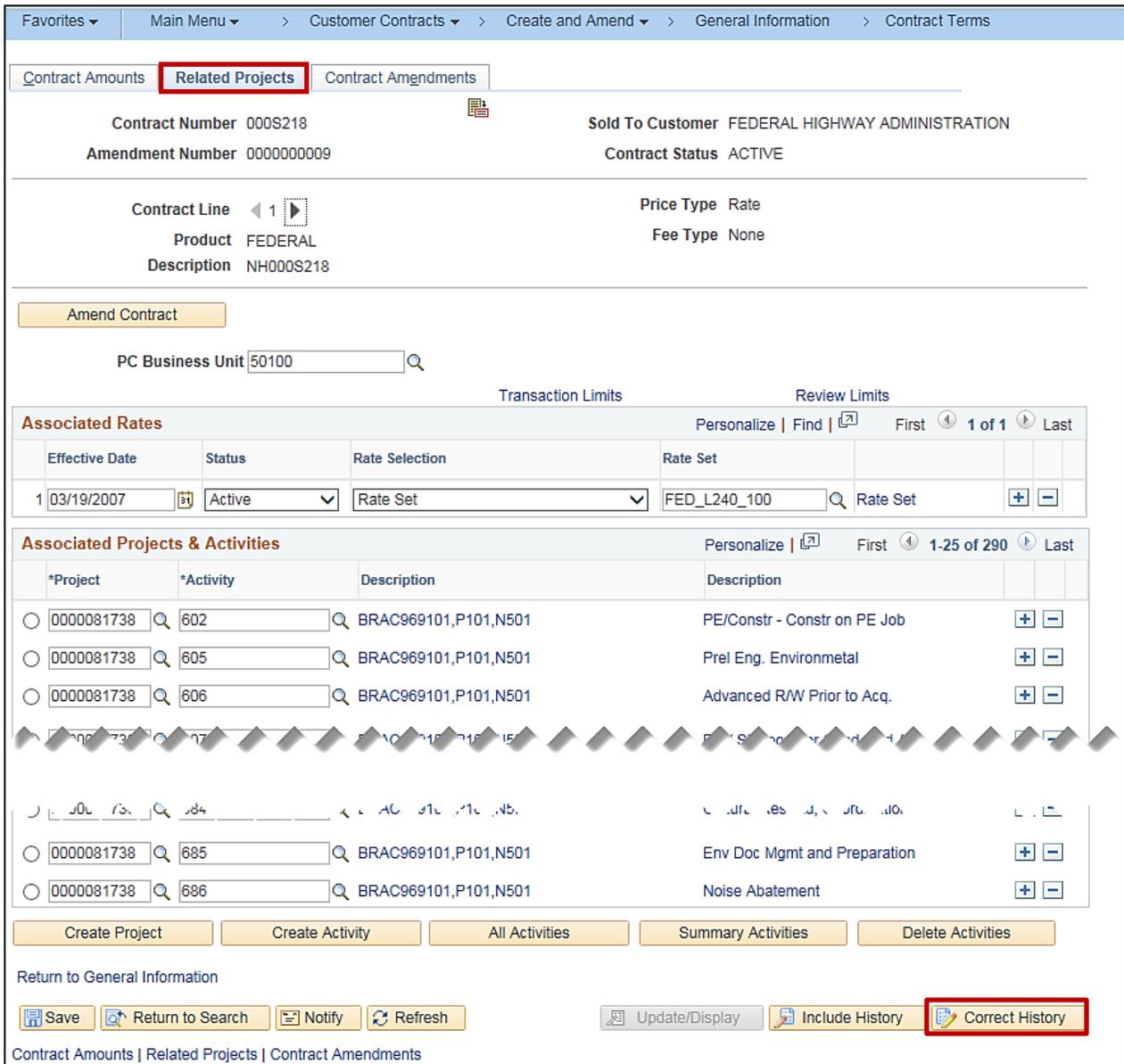
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▾ Actions	1	FEDERAL	NH000S218	Rate	In Progress	In Progress	<b>Contract Terms</b>	Distribution	Internal Notes	FEDERAL HIGHWAY ADMINISTRATION
▾ Actions	2	FEDERAL	NH000S218	Rate	In Progress	Ready	Contract Terms	Distribution	Internal Notes	FEDERAL HIGHWAY ADMINISTRATION

Billing Plans Revenue Plans Milestones Supplemental Data Go To

 Save  Return to Search  Notify  Add  Update/Display

General | Lines | Amendments

16. Click the **Lines** tab.
17. In the **Contract Lines** section, click the **Detail** tab.
18. Click the **Contract Terms** hyperlink.



The screenshot shows a software interface for managing contract information. At the top, there is a navigation menu with 'Favorites', 'Main Menu', 'Customer Contracts', 'Create and Amend', 'General Information', and 'Contract Terms'. Below this, there are three tabs: 'Contract Amounts', 'Related Projects' (highlighted with a red box), and 'Contract Amendments'. The main content area displays contract details for Contract Number 000S218 and Amendment Number 0000000009, with Sold To Customer FEDERAL HIGHWAY ADMINISTRATION and Contract Status ACTIVE. It also shows Contract Line 1, Product FEDERAL, and Description NH000S218. There is an 'Amend Contract' button and a search field for 'PC Business Unit' with the value 50100. Below this, there are sections for 'Associated Rates' and 'Associated Projects & Activities'. The 'Associated Rates' section shows a table with columns for Effective Date, Status, Rate Selection, and Rate Set. The 'Associated Projects & Activities' section shows a table with columns for \*Project, \*Activity, and Description. At the bottom of the interface, there are several buttons: 'Create Project', 'Create Activity', 'All Activities', 'Summary Activities', and 'Delete Activities'. Below these buttons, there is a 'Return to General Information' link and a row of utility buttons: 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History' (highlighted with a red box).

19. Click the **Related Projects** tab
20. Click the **Correct History** button at the bottom of the page.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Contract Terms](#)

[Contract Amounts](#) | [Related Projects](#) | [Contract Amendments](#)

**Contract Number** 000S218      **Sold To Customer** FEDERAL HIGHWAY ADMINISTRATION  
**Amendment Number** 000000009      **Contract Status** ACTIVE

---

**Contract Line** ◀ 1 ▶      **Price Type** Rate  
**Product** FEDERAL      **Fee Type** None  
**Description** NH000S218

[Amend Contract](#)

**PC Business Unit**

**Associated Rates**      Transaction Limits      Review Limits

Effective Date	Status	Rate Selection	Rate Set
1   03/19/2007	Inactive	Rate Set	Rate Set

**Associated Projects & Activities**

*Project	*Activity	Description	Description
0000081738	602	BRAC969101,P101,N501	PE/Constr - Constr on PE Job
0000081738	605	BRAC969101,P101,N501	Prel Eng. Environmental
0000081738	606	BRAC969101,P101,N501	Advanced LRW/Prior to Ac
0000081738	685	BRAC969101,P101,N501	Env Doc Mgmt and Preparation
0000081738	686	BRAC969101,P101,N501	Noise Abatement

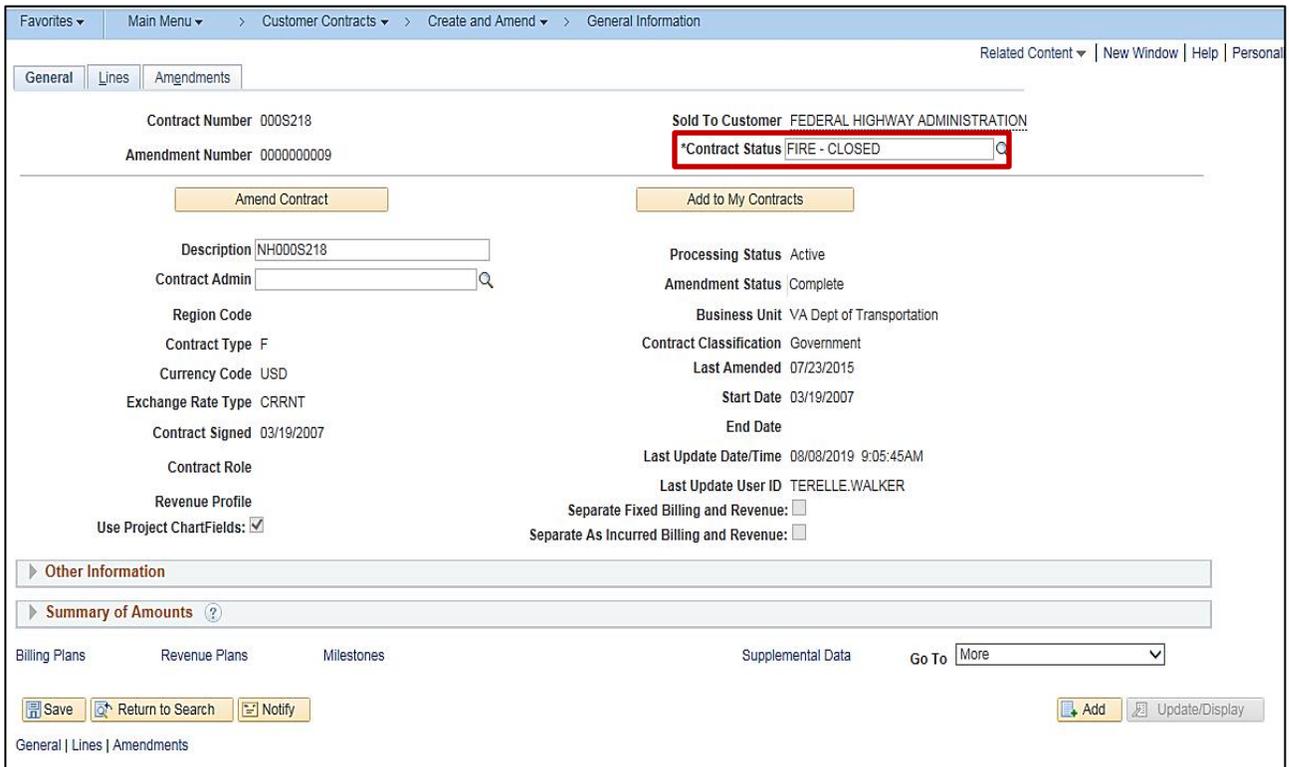
[Create Project](#)    [Create Activity](#)    [All Activities](#)    [Summary Activities](#)    [Delete Activities](#)

[Return to General Information](#)

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

[Contract Amounts](#) | [Related Projects](#) | [Contract Amendments](#)

21. In the **Associated Rates** section, update the following fields:
  - a. **Status:** Change to **Inactive**
  - b. **Rate Set:** Remove the **Rate Set**
22. Click the **Save** button.
23. Click the **Return to General Information** hyperlink.



Favorites ▾ Main Menu ▾ > Customer Contracts ▾ > Create and Amend ▾ > General Information Related Content ▾ | New Window | Help | Personal

General | Lines | Amendments

Contract Number 000S218 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION  
 Amendment Number 000000009 \*Contract Status FIRE - CLOSED

Amend Contract Add to My Contracts

Description NH000S218 Processing Status Active  
 Contract Admin   Amendment Status Complete  
 Region Code Business Unit VA Dept of Transportation  
 Contract Type F Contract Classification Government  
 Currency Code USD Last Amended 07/23/2015  
 Exchange Rate Type CRRNT Start Date 03/19/2007  
 Contract Signed 03/19/2007 End Date  
 Contract Role Last Update Date/Time 08/08/2019 9:05:45AM  
 Revenue Profile Last Update User ID TERELLE.WALKER  
 Use Project ChartFields:  Separate Fixed Billing and Revenue:   
Separate As Incurred Billing and Revenue:

▶ Other Information  
 ▶ Summary of Amounts ?

Billing Plans Revenue Plans Milestones Supplemental Data Go To More ▾

General | Lines | Amendments

24. The **General Information** page displays. Click the **General** tab.
25. Click the lookup icon next to the **Contract Status** field. The **Look Up Contract Status** pop-up window displays.
26. Click on **FIRE - CLOSED**.
27. The **Contract Status** updates to **FIRE-CLOSED**.
28. Click the **Save** button.

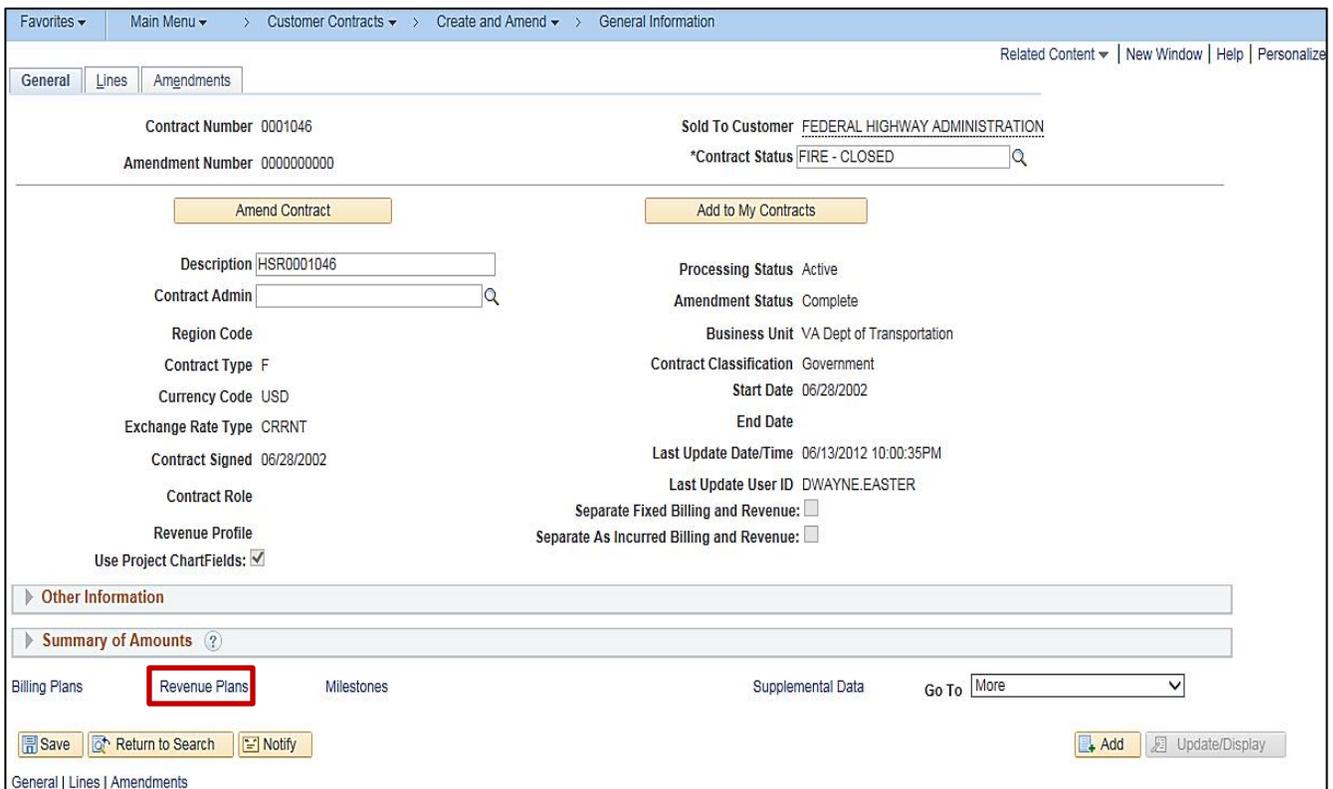
### Change Contract Status to FV ACCEPTED

When processing a modification which indicates the final voucher has been paid:

1. Access the contract, amend **Transaction Limits** as needed, update the Billing Plan's **Billing Status** to **Completed** and update the **Associated Rate Status** to **Inactive**, and remove the **Rate Set**.
2. Update the **Revenue Plan Status** to **Completed**.

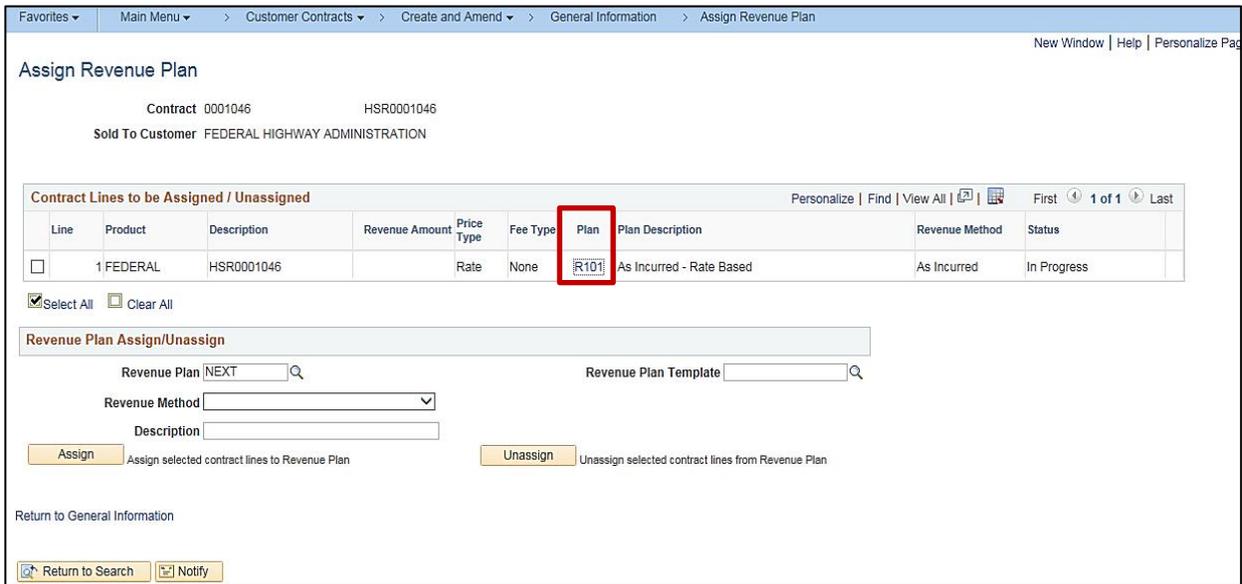
### Place the Revenue Plan on Hold

The steps to place the **Revenue Plan** on **Hold** are the same as when you placed the **Billing Plan** on **Hold**, except you would choose the **Revenue Plan** related hyperlinks.

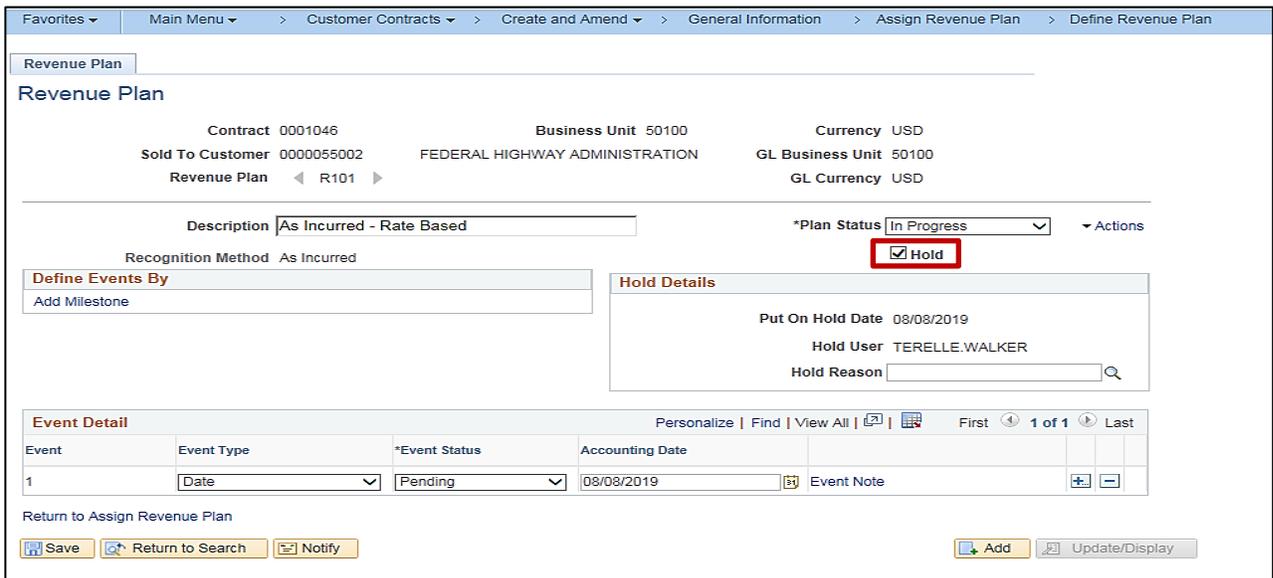


The screenshot shows a web application interface for contract management. At the top, there is a breadcrumb trail: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information. Below this, there are tabs for General, Lines, and Amendments. The main content area displays contract details for Contract Number 0001046 and Amendment Number 000000000. The Sold To Customer is FEDERAL HIGHWAY ADMINISTRATION, and the Contract Status is FIRE - CLOSED. There are buttons for 'Amend Contract' and 'Add to My Contracts'. The contract description is HSR0001046. Other details include Contract Admin, Region Code, Contract Type F, Currency Code USD, Exchange Rate Type CRRNT, Contract Signed 06/28/2002, Contract Role, Revenue Profile, and Use Project ChartFields checked. On the right side, there are fields for Processing Status (Active), Amendment Status (Complete), Business Unit (VA Dept of Transportation), Contract Classification (Government), Start Date (06/28/2002), End Date, Last Update Date/Time (06/13/2012 10:00:35PM), and Last Update User ID (DWAYNE.EASTER). There are also checkboxes for 'Separate Fixed Billing and Revenue' and 'Separate As Incurred Billing and Revenue'. Below the main details, there are sections for 'Other Information' and 'Summary of Amounts'. At the bottom, there are navigation options: Billing Plans, Revenue Plans (highlighted with a red box), Milestones, Supplemental Data, and Go To (More). There are also buttons for Save, Return to Search, Notify, Add, and Update/Display.

3. From the **General Information** page, **General** tab, click the **Revenue Plans** hyperlink.



4. The **Assign Revenue Plan** page displays.



5. Click the **Revenue Plan** hyperlink for the **Revenue Plan** that needs to be placed on **Hold**.

6. The **Hold Details** section displays, with three fields:

- a. **Put On Hold Date:** populates with the current date which matches the date that displays next to the check box.
- b. **Hold User:** populates with the name of the person who placed the Hold.
- c. **Hold Reason:** click the lookup icon to select the reason for the hold.

Business Unit 50100 Currency USD

Look Up Hold Reason ✕

Help

SetID 50100

Hold Reason begins with

Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-9 of 9 Last

Hold Reason	Description
DPPD	Process Def Prepaid
KTST	PUM Test Hold reason
<b>OTHR</b>	<b>Other</b>
PED	PED expired
PPD	Process Int. Prepaid
RATE	Clear processed amt
STOP	Stop bills for line
UPED	Make Update to PED
WKST	Clear wsht error

7. Select the reason for the hold from the list. For this scenario, **OTHR** is selected.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Assign Revenue Plan](#) > [Define Revenue Plan](#)

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**Revenue Plan**

Contract 0001046      Business Unit 50100      Currency USD  
 Sold To Customer 0000055002      FEDERAL HIGHWAY ADMINISTRATION      GL Business Unit 50100  
 Revenue Plan ◀ R101 ▶      GL Currency USD

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Description  ×      \*Plan Status  ▼      ▼ Actions  
 Recognition Method As Incurred       Hold

**Define Events By**

[Add Milestone](#)

**Hold Details**

Put On Hold Date 08/08/2019

Hold User TERELLE.WALKER

Hold Reason  🔍

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**Event Detail** Personalize | Find | View All | 📄 | 📅 | First ⏪ 1 of 1 ⏩ Last

Event	Event Type	*Event Status	Accounting Date	
1	<input type="text" value="Date"/> ▼	<input type="text" value="Pending"/> ▼	<input type="text" value="08/08/2019"/> 📅	Event Note <input type="text"/> + -

[Return to Assign Revenue Plan](#)

8. Click the **Save** button.
9. Click the **Return to Assign Revenue Plan** hyperlink. The **Assign Revenue Plan** page displays.
10. Click the **Return to General Information** hyperlink. The **General Information** page, General tab displays.

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

Related Content | New Window | Help | Personalize

General **Lines** Amendments

Contract Number 0001046 Sold To Customer FEDERAL HIGHWAY ADMINISTRATION  
Amendment Number 0000000000 Contract Status FIRE - CLOSED

Amend Contract

**Contract Lines** ? Personalize | Find | View All | 1 of 1 | First | Last

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

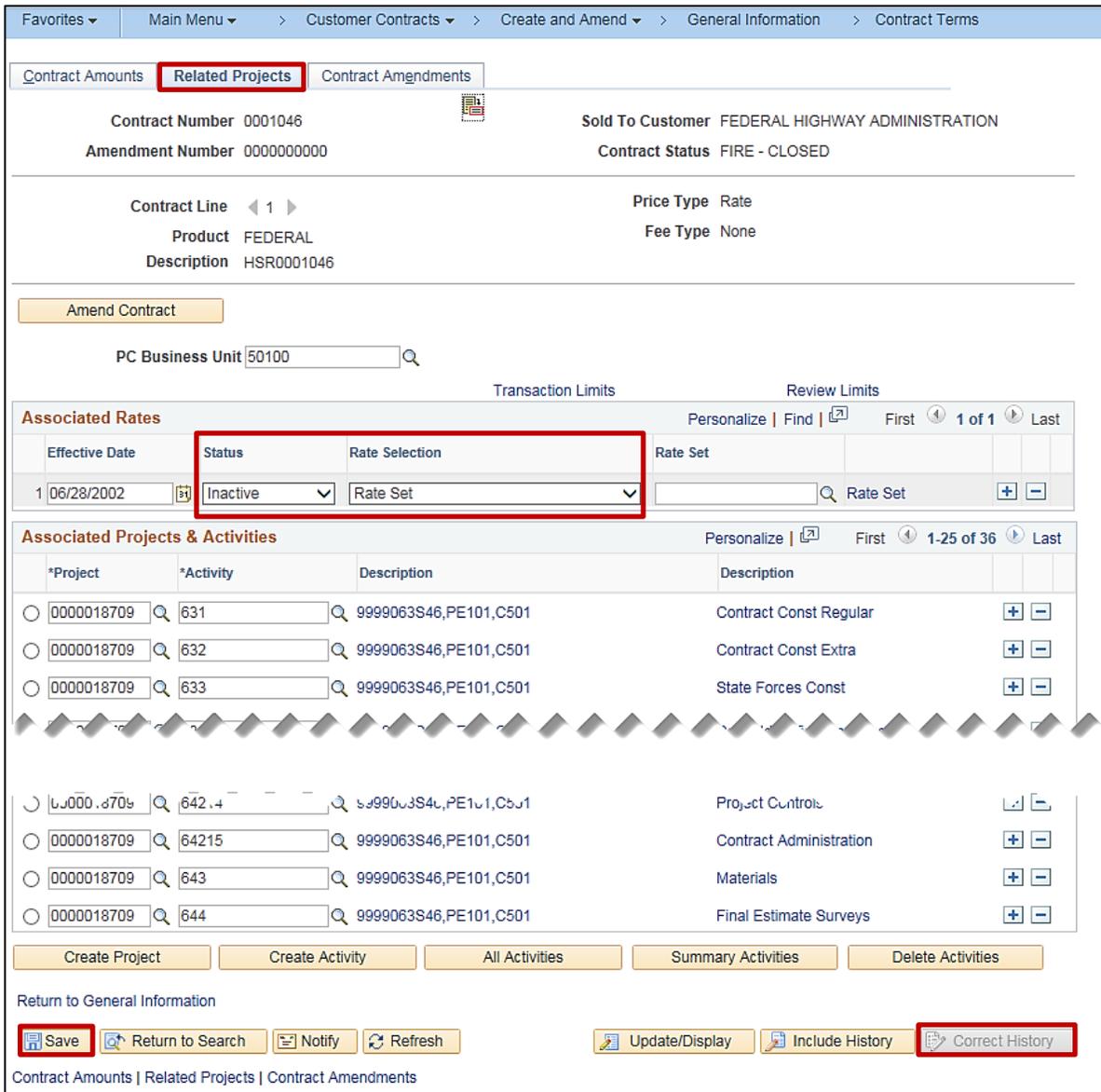
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms	Accounting	Internal Notes	Ship to Customer Name
▼ Actions	1	FEDERAL	HSR0001046	Rate	Completed	In Progress	<b>Contract Terms</b>	Distribution	Internal Notes	FEDERAL HIGHWAY ADMINISTRATION

Billing Plans Revenue Plans Milestones Supplemental Data Go To More

Save Return to Search Notify Add Update/Display

General | Lines | Amendments

11. Click the **Lines** tab.
12. In the **Contract Lines** section, click on the **Detail** tab.
13. Click the **Contract Terms** hyperlink.



The screenshot shows a software interface for managing contract terms. At the top, there are navigation tabs: Favorites, Main Menu, Customer Contracts, Create and Amend, General Information, and Contract Terms. Below this, there are three sub-tabs: Contract Amounts, **Related Projects** (highlighted with a red box), and Contract Amendments.

Contract details include: Contract Number 0001046, Amendment Number 0000000000, Sold To Customer FEDERAL HIGHWAY ADMINISTRATION, and Contract Status FIRE - CLOSED. Contract Line 1 is selected, with Product FEDERAL and Description HSR0001046. Price Type is Rate and Fee Type is None.

An "Amend Contract" button is visible, along with a search field for PC Business Unit (50100). Below this are sections for Transaction Limits and Review Limits.

The **Associated Rates** section contains a table with columns: Effective Date, Status, Rate Selection, and Rate Set. The first row shows an effective date of 06/28/2002, a status of **Inactive** (highlighted with a red box), and a rate selection of **Rate Set** (highlighted with a red box).

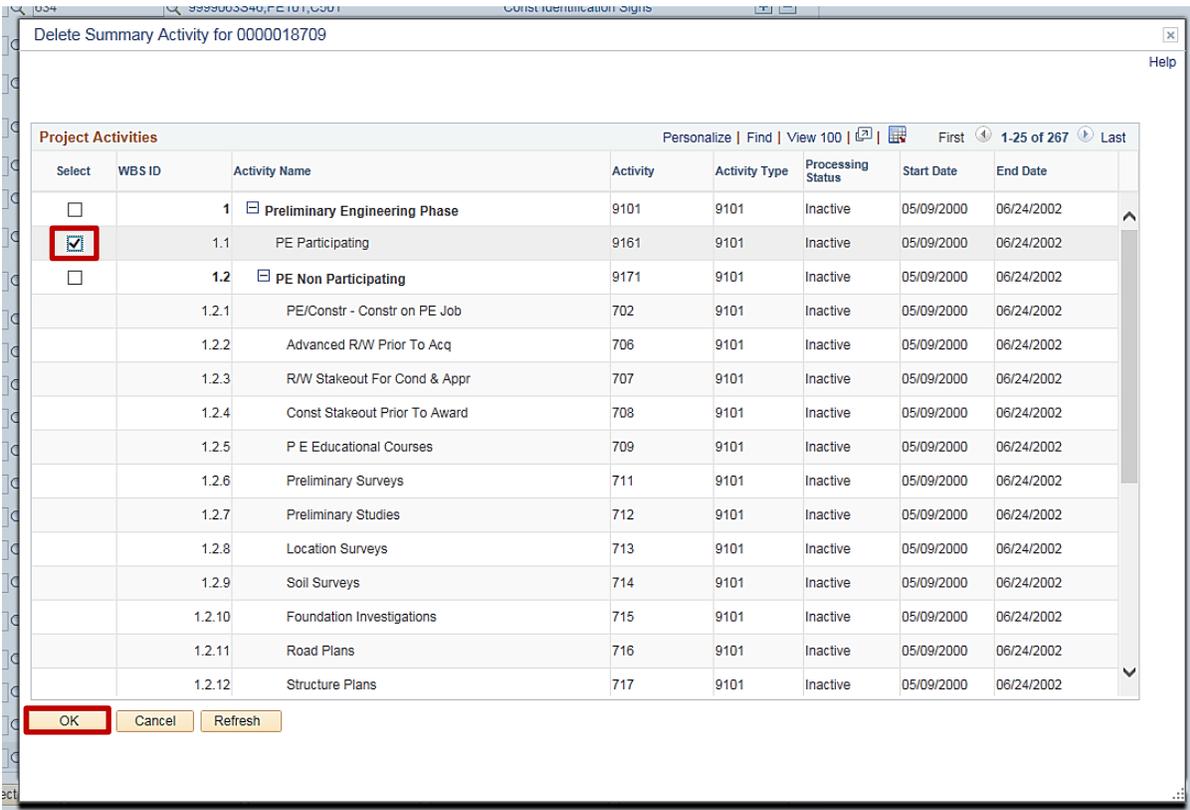
The **Associated Projects & Activities** section contains a table with columns: \*Project, \*Activity, and Description. It lists several activities such as "Contract Const Regular", "Contract Const Extra", "State Forces Const", "Project Controls", "Contract Administration", "Materials", and "Final Estimate Surveys".

At the bottom, there are buttons for "Create Project", "Create Activity", "All Activities", "Summary Activities", and "Delete Activities". A "Return to General Information" link is also present. A row of action buttons includes **Save** (highlighted with a red box), "Return to Search", "Notify", "Refresh", "Update/Display", "Include History", and **Correct History** (highlighted with a red box).

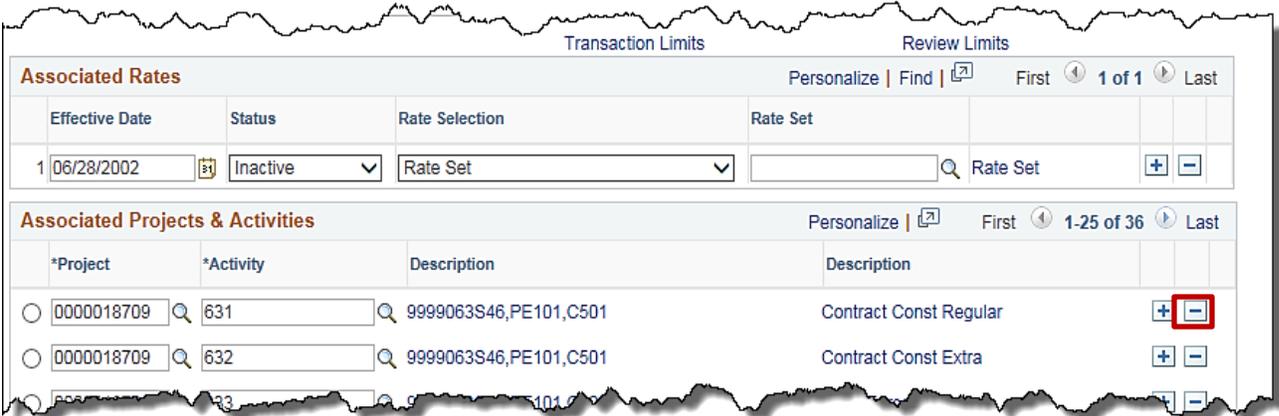
14. Click the **Related Projects** tab.
15. Click the **Correct History** button at the bottom of the page.
16. **Associated Rates** section:
  - a. **Status:** Update to **Inactive**
  - b. **Rate Set:** Remove the **Rate Set**
17. Click the **Save** button.



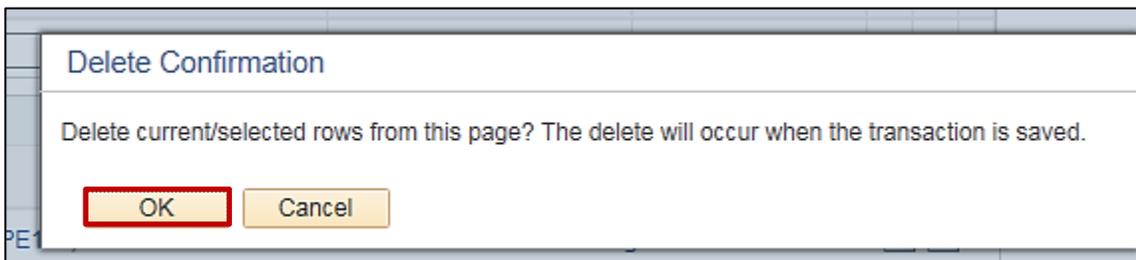
18. Select the radio button next to the **Project** and **Activity** combination that is associated with the contract. Take note of the phase of the activities that are listed.
19. Click the **Delete Activities** button.



20. The **Delete Summary Activity** pop-up window displays.
21. Select the check box button next to the phase of the participating activities that are to be deleted.
22. Click the **OK** button.

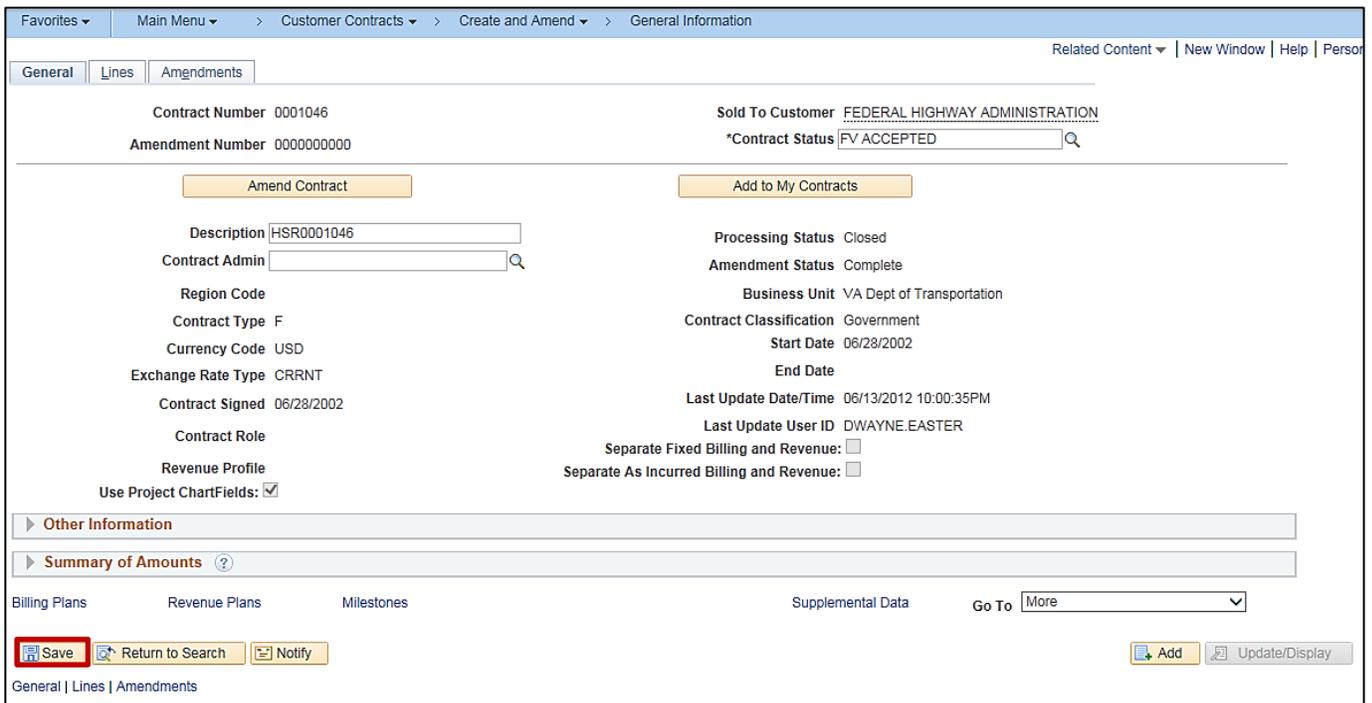


23. The **Contract Terms** page, **Related Projects** tab displays.
24. If there are activities still associated to the contract, click the (–) icon next to each of these activities.



25. A **Delete Confirmation** pop-up message displays. It lets you know the delete will occur when the transaction is saved.
26. Click the **OK** button.

27. Click the **Save** button. The **Contract Terms** page, **Related Projects** tab displays.
28. Select the **General Information** hyperlink. The **General Information** page, **Lines** tab displays.
29. Click the **General** tab.
30. Click the lookup icon next to the **Contract Status** field. The **Look Up Contract Status** pop-up window displays.
31. Click on **FV ACCEPTED**. The **General Information** page, **General** tab displays.



The screenshot shows a web application interface for contract management. The breadcrumb trail is: Favorites > Main Menu > Customer Contracts > Create and Amend > General Information. The page has tabs for 'General', 'Lines', and 'Amendments', with 'General' selected. The contract details are as follows:

- Contract Number: 0001046
- Amendment Number: 0000000000
- Sold To Customer: FEDERAL HIGHWAY ADMINISTRATION
- \*Contract Status: FV ACCEPTED
- Description: HSR0001046
- Contract Admin: [lookup icon]
- Region Code: [empty]
- Contract Type: F
- Currency Code: USD
- Exchange Rate Type: CRRNT
- Contract Signed: 06/28/2002
- Contract Role: [empty]
- Revenue Profile: [empty]
- Use Project ChartFields:
- Processing Status: Closed
- Amendment Status: Complete
- Business Unit: VA Dept of Transportation
- Contract Classification: Government
- Start Date: 06/28/2002
- End Date: [empty]
- Last Update Date/Time: 06/13/2012 10:00:35PM
- Last Update User ID: DWAYNE.EASTER
- Separate Fixed Billing and Revenue:
- Separate As Incurred Billing and Revenue:

Buttons include 'Amend Contract', 'Add to My Contracts', 'Save' (highlighted), 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A 'Go To' dropdown menu is set to 'More'. The bottom navigation bar shows 'General | Lines | Amendments'.

32. Click the **Save** button.