

State of Oklahoma

COR437

Contract Setup Manual

Office of Management & Enterprise Services



OKLAHOMA

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Product Price Page 38



Document History

<u>Document Revision</u>	<u>Date</u>	<u>Description</u>
1.0	04/30/2010	Initial Document
2.0	05/01/2014	Upgrade Update
3.0	10/21/2024	Upgrade Update

The content of this training manual is based largely on a generic system configuration and illustrates the base-line functionality required to execute transactions in the module. Your agency may be utilizing more or less of the functionality illustrated in this manual. This manual is intended to be a framework upon which agencies can add agency-specific training content that speaks specifically to the system functionality that they have deployed and related configuration that they use for transaction processing. Agencies should not depend on these manuals for end-user training or problem resolution until they have been reviewed by the agency for appropriateness.



Contracts Setup

Customer Contracts require initial setup and configuration to operate in the system.

Products are the building block of Contract Lines and define how the Contract will Bill Customers and recognize Revenue.

Support Teams allow an agency to link individuals to a Contract.

Contract Amendments are classified and recorded by **Amendment Types** and **Amendment Reasons**.

Contract **Templates** are used to facilitate Bill and Revenue Plan creation.



Key Terms

Contracts Business Unit: Each agency has one, and only one Contracts Business Unit. The Business Unit is the three (3) digit agency code, plus 00. For example, Office of Management and Enterprise Services is 09000.

Customer: A customer is an external entity that is defined in a Contract to receive invoices and from which revenue is recognized.

Contract Bill Plan: The Bill Plan defines the schedule, parameters, and configuration of the Customer invoice. A Contract manages the billing process through the creation of Billing plans. Billing plans are Contract specific. The Billing plan stores the schedule of billing events and the corresponding bill lines for these events. Each contract line product is tied to a billing plan.

Contract Revenue Plan: The Contract Revenue Plan defines how and when customer revenue will be recognized for accounting purposes. Define a revenue plan for Contract lines in which revenue is managed by Contracts. For each revenue plan that is defined, **select** a Revenue Recognition method for the Revenue Plan and define the Events that trigger revenue recognition. Revenue Plans are not defined for contract lines with a revenue method of Billing Manages Revenue.

Billing Event: A Billing Event is a “trigger” that initiates contract billing. The Event could be a date, milestone, etc. Bill Plans define Billing Events that are used to generate billing that is interfaced into the Billing Module.

Revenue Recognition Method: Revenue recognition methods define the criteria that must be met before revenue can be recognized. Specify revenue recognition methods for products on the Product Definition component. The associated revenue recognition method appears when you select a product onto the contract line.

Product: A Product is the core contractual obligation of products or services that an agency provides to the public. These could be fees, licenses or even grant related products. A Product represents the basis for the Contract Line and determines what type of Contract will be created. Products are associated with a set of attributes that include pricing structure, tax parameters, and accounting information. Once defined Products are used in the Contract creation process.

Price Type: Contract Products are classified as Rate-Based, Amount-Based, or Recurring. Rate-based products have a price type of Rate, Amount-Based products have a price type of Amount or Percent, and recurring products have a price type of Recurring. The price type that you select for a product determines the details that you define for that product and the billing and revenue recognition methods with which you can associate the product.



Project Costing Business Unit: Each agency has one, and only one Project Costing Business Unit. The Business Unit is the 3-digit agency code, plus 00. For example, Office of Management and Enterprise Services is 09000.

Project ID: The Project ID represents the basic unit that serves to establish budgets and collect costs and revenue for analysis purposes. Projects serve to collect construction costs and capitalize Assets in conjunction with the Asset Management module. the Project ID is also a Chartfield and as such a part of the distribution line. In Contracts, the Project ID is the basic unit that makes up a Rate-Based contract. It is used to collect expended costs and bill customers for those costs.

Activity ID: An Activity ID generally represents a task that makes up a Project. Project Costs and Budgets are stored in Activities. In Contracts, the Activity ID is used to collect costs that are priced and billed to customers for reimbursement.

Prepaid: An amount paid in advance by a Customer in a Rate-Based Contract agreement. The prepaid amounts are applied or deducted from otherwise billable costs collected in a Project until all prepaid amounts are fully “utilized”.



Process Flows

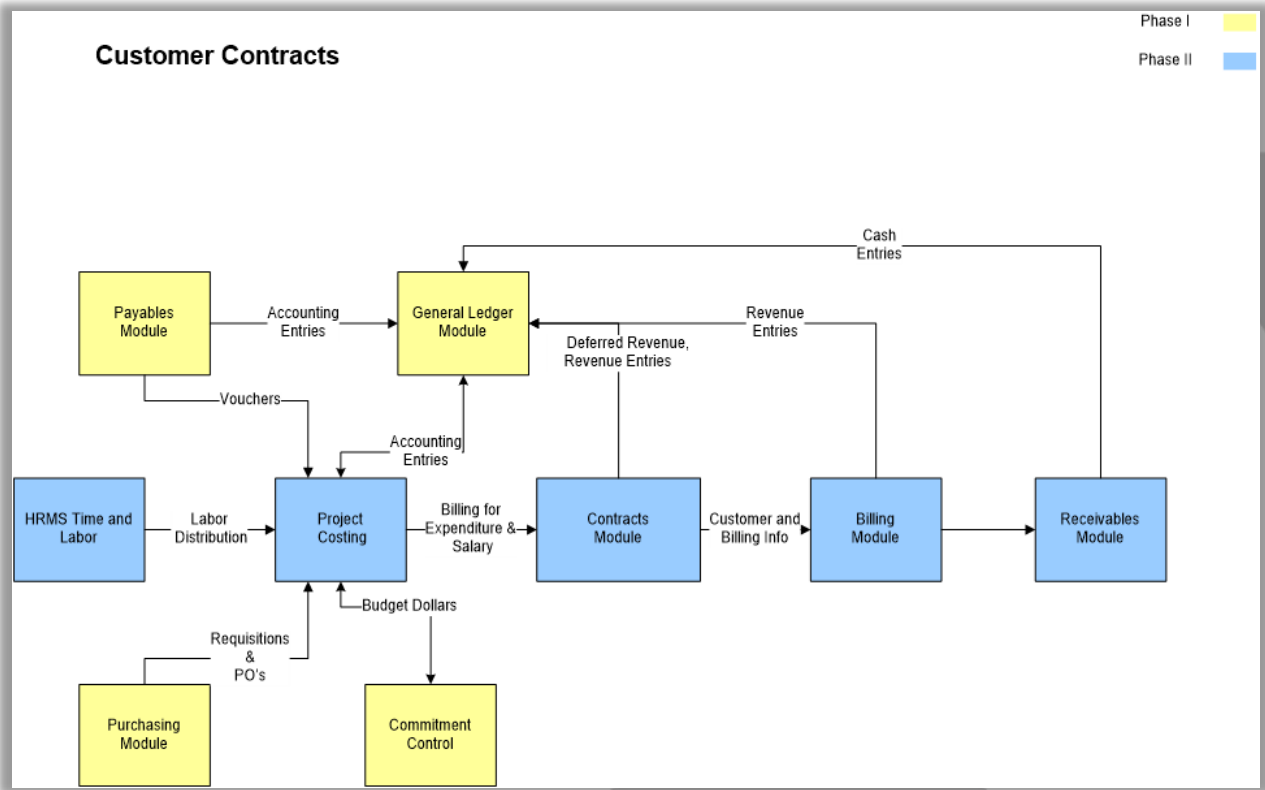


Diagram 1: Customer Contracts Module Integration

Guidelines, Concepts, and Alternatives

Price Type	Description	Billing Method	Revenue Recognition Method
Amount or Percent	Used for contracts with a fixed price. Or, used for contracts that are priced as a percent of one or more contract lines.	Milestone, Percent Complete, Immediate	Milestone, Percent Complete, Apportionment, Billing Manages Revenue
Rate	Used for contracts, such as services, with a rate-based pricing structure, such as \$400 per hour worked. The actual monetary amount is not known until the hours have been worked and reported	As-incurred, Value-based	As-incurred
Recurring	Used for contracts that have a recurring pricing structure where a start date and schedule are defined	Recurring	Billing Manages Revenue

Table 1: Product Price Types with Billing and Revenue Methods



Define Contract Support Teams

Use Contract Support Teams to better track individuals that are associated with a Contract. Employees must be set up as team members and associated with a function. When Support Teams are added to a contract, it clearly identifies who is associated with the contract and specifies their role.

Contract Support Teams can be associated with an individual Contract, a Contract Type, or a Contract Business Unit.

Define Support Teams by Contract

Navigation: *Customer Contracts > Create and Amend > Support Teams > Find an Existing Value*

Support Teams

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Business Unit =

Contract begins with

Description begins with

Sold To Customer begins with

Customer Name begins with

Contract Status begins with

Processing Status =

Contract Type begins with

Contract Classification =

Region Code begins with

Contract Administrator begins with

Master Contract # begins with

Case Sensitive

[Basic Search](#)
[Save Search Criteria](#)

Use the **Search Criteria** to find the desired Contract.

Business Unit – Select the agency Contracts business unit.

Contract – Populate if the Contract number is known.

Description – Search by Contract Description.

Sold to Customer – Search by the Customer ID.

Contract Status – Use this field to retrieve all Contracts in a particular Status.

Click the **Search** button to retrieve Contracts matching the Search Criteria.



Support Team by Contract Page

Support Team by Contract

Contract 00-129
Contract Status ACTIVE

Component Support Teams

Component

Component Status

*Status	Support Team	Description	*Email Option	Interested Parties (Email CC)
1 %	STATE	State Team	Email All	

The **Support Team by Contract** page allows the user to select a pre-defined Support Team, configure a new Support Team, and link the Team to a Contract component or feature.

Component – Select the component of the Contract to which this Support Team will be linked.

Status – Use the status values to define a Support Team for a particular Contract Status.

Support Team – Select the pre-defined Support Team for the Contract.

Description – The description hyperlink navigates to the Support Team page where Team Members can be seen.

Click the **Add Support Team** button to add a new Support Team to the system.



Support Team Members

[Help](#)

Support Team Members

SetID 29200 Support Team Code NEXT

Support Team Description | | | 1 of 1 | View All

*Effective Date *Status

*Description

Short Description

Team Members

| | 1-1 of 1 | View All

*Team Member	Short Description	Manager	Priority
<input type="text" value="STATE_01"/> <input type="text"/>	State Team Member	State	<input type="text"/> <input type="text"/> <input type="text"/>

Select a **Team Member** and enter a **Description** to add them to the Support Team. Click the **plus** button to insert additional Team Members.

Click the **OK** button to return to the Support Team by Contract page.

Click the **Save** button to save the Contract Support Team.



Define Support Teams by Contract Type

Navigation: Setup Financial Supply Chain > Product Related > Contracts > Support Teams > Setup CA Support Teams by Type > Find an Existing Value

Support Teams by Contract Type

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Business Unit = ▼

Contract Type begins with ▼

[Basic Search](#)

Business Unit – Select the agency Contracts business unit.

Contract Type – Populate the Contract Type that will be linked to the Support Team.

Click the **Search** button to retrieve Contracts matching the Search Criteria.



Support Team by Contract Type Page

Support Teams by Contract Type

Business Unit 29200
Contract Type GRANT

Component Support Teams Q | << < 1 of 1 > >>

Component

Component Status

<< < 1-1 of 1 > >> | View All

	*Status	Support Team	Description	*Email Option	Interested Parties (Email CC)		
1	% <input type="text"/>	STATE <input type="text"/>	State Team	Email All <input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Use the **Support Teams by Contract Type** page to link a team to all contracts that are categorized in a particular Contract Type.

Component – Select the component of the Contract to which this Support Team will be linked.

Status – Use the status values to define a Support Team for a particular Contract Status.

Support Team – Select the pre-defined Support Team for the Contract Type.

Description – The description hyperlink navigates to the Support Team page where Team Members can be seen.

Click the **Add Support Team** button to add a new Support Team to the system.



Support Team Members

[Help](#)

Support Team Members

SetID 29200 Support Team Code NEXT

Support Team Description
Q
1 of 1
View All

*Effective Date

*Description

Short Description

*Status

Team Members
1-1 of 1
View All

*Team Member	Short Description	Manager	Priority		
<input type="text" value="STATE_01"/> Q	State Team Member	State	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Select a **Team Member** and enter a **Description** to add them to the Support Team. Click the **plus** button to insert additional Team Members.

Click the **OK** button to return to the Support Team by Contract page.

Click the **Save** button to save the Contract Type Support Team.

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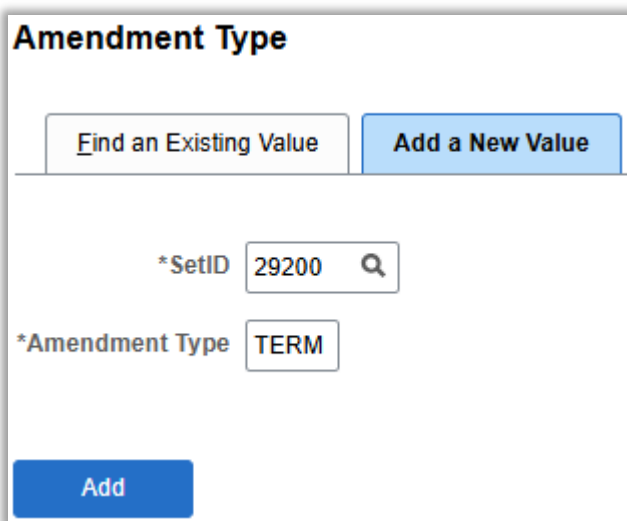
Define Amendment Types and Reasons

When Contract Amendments are initiated, they can be categorized by Amendment Type and Amendment Reason. Amendment Types and Reasons provide a history and classification mechanism to view Contract Amendments.

Amendment Types are high-level classifications that are assigned to an amendment. Amendment Reasons are typically lower-level detail than the Amendment Reason and provide more insight to the actual amendment process.

Define Amendment Types

Navigation: Setup Financial Supply Chain > Product Related > Contracts>Amendments > Setup CA Amendment Types > Add a New Value



Amendment Type

Find an Existing Value Add a New Value

*SetID 29200 🔍

*Amendment Type TERM

Add

Set ID – Populate with the agency business unit number.

Amendment Type – Populate with a 4-character Amendment Type.

Click the **Add** button to create an Amendment Type.

Amendment Type Page

Amendment Type

SetID 29200

Amendment Type TERM

Amendments

|
◀
|
▶
|
1 of 1
|
▶▶
| View All

*Effective Date

*Status ▼

Short Description

Description

+

-

Use the Amendment Type page to define dates, status, and description information.

Effective Status – The date the Amendment Type is effective.

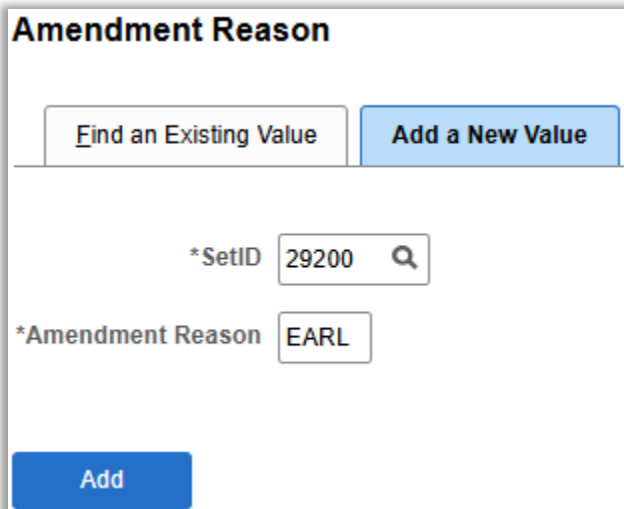
Description – This value is visible on the Contract Amendment page when initiating an Amendment.

Click the Save button to Save the Amendment Type.



Define Amendment Reasons

Navigation: Setup Financial Supply Chain > Product Related > Contracts > Amendments > Setup CA Amendment Reasons > Add a New Value



Amendment Reason

*SetID

*Amendment Reason

Set ID – Populate with the agency business unit number.

Amendment Reason – Populate with a 4-character Amendment Reason.

Click the **Add** button to create an Amendment Reason.



Amendment Reason Page

Amendment Reason

SetID 29200

Amendment Reason EARL

Short Description

Description

Use the Amendment Reason page to define dates, status, and description information.

Short Description – Enter a short description for the Amendment Reason.

Description – This value is visible on the Contract Amendment page when initiating an Amendment.

Click the **Save** button to Save the Amendment Reason.



Define Rate Sets

Rate-Based Contracts use Project Costing to store Project transactions for customer billing purposes. When Project transactions are collected in Project Costing and the Project and Activity is linked to a Contract, those Project transactions are “Priced” to facilitate customer billing.

The Pricing Engine is driven by Rate Sets. Rate Sets are stored on the Contract Line where the Project and Activity are defined for Rate-Based Contracts. Rate Sets define how collected Project transactions are treated by the Pricing Engine. Project transactions can be marked up, marked down, billed at cost, etc.

Creating Rate Sets

Navigation: Setup Financial Supply Chain > Product Related > Project Costing > Pricing Structure > Setup PC Rate Sets PC > Add a New Value

Rate Sets

Find an Existing Value Add a New Value

*Business Unit 29200 🔍

*Rate Set AS_INCURRED

*Rate Set Type Standard ▼

Add

Business Unit – Rate Sets are defined for each agency business unit.

Rate Set – The Rate Set value.

Rate Set Type – Set to ‘Standard’.

Click the **Add** button to create a Rate Set.



Rate Sets Tab

Business Unit 29200
 Rate Set Type Standard
 *Description As Incurred Rate Set

Rate Set AS_INCURRED
 *Rate Definition Type Billing
 Rate Set Category

Define Rate Set
 Effective Date 08/30/2010
 Status Active

Define Criteria for Incoming Transactions

Target	Analysis Type	Source Type	Category	Subcategory	Project Role	Job Code	Time Reporting Code	Employee ID	Unit of Measure	Currency	General L Business
Target	ACT	%	%	%	%	%	%	%	%	%	%
Target	PAY	%	%	%	%	%	%	%	%	%	%

The **Rate Sets** Tab defines the chartfield values that will be matched against incoming Project transactions to create target rows.

Rate Definition Type – Define the Rate Set for ‘Billing’ Project transactions or for ‘Costing’ Project transactions. Rate Sets for Billing are used with the Contracts Module to create Rate-Based Billing rows for invoicing. Rate Sets for Cost could be used to create ‘Overhead’ rows in a Project.

NOTE: This selection will restrict the Target Analysis Types available for selection on the Target page.

Description – Create a Description for the Rate Set.

Effective Date – Define the date that the Rate Set will be effective.

Analysis Type – Define the Analysis Type that the Rate Set will use to match Project transactions for Pricing.

NOTE: The Rate Set page works as a ‘Filter’ that only selects incoming Project Transactions that match exactly the values on the Rate Set page. All incoming transactions that match the field values on the Target page are subject to the Pricing Engine. The wildcard value of ‘%’ indicates that any value in that field will match the Rate Set.

Click the **Target** Tab or use the **Target** link at the bottom of the page.

Target Page

Rate Sets | **Target**

Business Unit 29200 Rate Set AS_INCURRED
 Description As Incurred Rate Set Rate Definition Type Billing
 Rate Set Type Standard Rate Set Category

Source Criteria [Search] 1 of 2

Analysis Type ACT Project Role % General Ledger Business Unit %
 Job Code % Time Reporting Code % Unit of Measure %
 Employee ID % Currency %

General Ledger Information
 General Ledger Chartfields

Source Type	Category	Subcategory	Account	Alt Acct	Operating Unit	Fund Type	Dept	Program	Class-Funding	Bud Ref
%	%	%	%	%	%	%	%	%	%	%

Define Target Rows [Search] 1-1 of 1 | View All

Rate Option	Rate Name	Rate Amount	Description	Target Analysis Type	Override Source	Target Source Type	Target Category	Target Subcategory	To Currency		
NON		1.000000	Billable Costs	BIL	<input type="checkbox"/>						<input type="button" value="+"/> <input type="button" value="-"/>

Save Notify Refresh Add Update/Display Include History Correct History

Rate Sets | Target

For each row on the **Rate Sets** Tab, a **Target** row will be created to define the type of row that will be created by the Pricing Engine.

Rate Option – Defines how the target row will be created. This could be a markup or actual cost.

Description – This target row created in Projects will hold the description defined here.

Target Analysis Type – The target row created by the Pricing Engine will have this Analysis Type.

Target Source Type – The target row created by the Pricing Engine will have this Source Type. If left blank, the target row will inherit the Source Type from the source row,

Target Category – The target row created by the Pricing Engine will have this Source Category. If left blank, the target row will inherit the Source Category from the source row

Target Subcategory – The target row created by the Pricing Engine will have this Source Subcategory. If left blank, the target row will inherit the Source Subcategory from the source row



NOTE: If a chartfield value is not defined on the Target row, the target row will inherit the chartfield value from the source Project transaction line.

Click the **Save** button to Save the Rate Set.

NOTE: Once the Rate Set is defined, it can be linked to a Project and Activity for Pricing on the Contract Line page.

Define Contract Templates

Contracts **Templates** can be used to facilitate the process of creating Bill and Revenue Plans when initially defining Contracts. Templates can be used for Revenue Plans or Bill Plans. Once a Template is defined, it can be selected when defining the Contract.

Set up Revenue and Billing plan templates to automate the creation of Revenue and Billing plans. Optionally, associate events with your Revenue and Billing plan templates depending on the **Plan Method**. These events will populate onto the contract line when the Revenue or Billing plan template is linked with a Contract.

Templates are optional but can be particularly useful for Amount-Based Contracts that use Milestone Date Events (i.e., Monthly Billing).

Creating Revenue/Bill Plan Templates

Navigation: *Setup Financial Supply Chain > Product Related > Contracts > Templates > Setup CA Rev & Bill Plan Tmplt > Add a New Value*

Set ID – Enter the agency Business Unit value for the SetID.

Plan Template ID – Give the Template a Plan Template ID that represents the usage of the template.

Plan Method – Select the appropriate Bill or Revenue Method for this template. This value will define which types of Bill or Revenue Plans this template can be used with.

Click the **Add** button to create a Bill or Revenue Plan Template.

Revenue/Billing Plan Template Page

SetID 29200
Plan Template ID 12_MONTH
Plan Method Milestone

*Description

Automatically Ready Plan

- Activate Contract
- Process Amendment
- Approve Renewal
- Ready Prepaid

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

Event Detail

Event	*Event Type	Milestone Origin	Milestone Template	Add To Basis	UOM	Days Lag	Percentage		
1	Date				Month		8.33	±	—
2	Date			1	Month		8.33	±	—
3	Date			2	Month		8.33	±	—
4	Date			3	Month		8.33	±	—
5	Date			4	Month		8.33	±	—
6	Date			5	Month		8.33	±	—
7	Date			6	Month		8.33	±	—
8	Date			7	Month		8.33	±	—
9	Date			8	Month		8.33	±	—
10	Date			9	Month		8.33	±	—
11	Date			10	Month		8.33	±	—
12	Date			11	Month		8.37	±	—

Save
Notify
Refresh
Add
Update/Display

Use the **Revenue/Billing Plan Template** page to define default status values, dates, and Event information.

Description – Populate the Template description.

Activate Contract - Select to have the system automatically set this Billing or Revenue plan to Ready upon contract activation.

Process Amendment - Select to have the system automatically set this Billing or Revenue plan to Ready upon amendment processing.

Approve Renewal - Select to have the system automatically set this Billing or Revenue plan to Ready upon renewal approval

Ready Prepaid - Select to have the system automatically set the initial billing plan to Ready when the associated prepaid status is changed to Ready.

Basis Date Source – Define the source date that the system will use to populate Event Dates.

Basis Date Option – Define the date that will be used for Event Dates. This can be the Basis Date Source defined on this page, End of Month or a Specific Date defined.

Event Type – Select the Event Type. These values will be defined based on the Plan Method.

Add to Basis – Define the increment that will be used to build Events.

Unit of Measure – Select a pre-defined unit of measure to build Events.

Percentage – Define the Bill or Revenue Percentage that each Event will hold.

NOTE: Not all fields on this page are available for each Plan Method. Based on the Plan Method certain needed fields will be visible on the page.

Click the **Save** button to Save the Template.

NOTE: Revenue Plan Templates can also be created based on the same information defined in a Bill Plan Template but will facilitate revenue recognition rather than invoicing. For example, Event Dates can be defined monthly to recognize revenue along those dates.



Creating Detail Bill Plan Templates

Navigation: Setup Financial Supply Chain > Product Related > Contracts > Templates > Setup CA Bill Plan Dtl Tmplt > Add a New Value

Bill Plan Detail Templates

Find an Existing Value
Add a New Value

*SetID

*Bill Plan Detail Template ID

Find an Existing Value
Add a New Value

Set ID – Enter the agency Business Unit value for the SetID.

Bill Plan Detail Template ID – Give the Template a Plan Template ID that represents the usage of the template.

Click the **Add** button to create a Bill Plan Detail Template.



Bill Plan Detail Template Page

Billing Plan Detail Template

SetID 29200 Bill Plan Detail Template ID AMT_BASED

*Description
 Bill Currency

Customer Information

BI Unit Dept of Environmental Quality
 Bill To Customer Addr Num
 Bill To Contact

Billing Options

Bill Type Pre Approved
 Bill Source Direct Invoicing
 Summarization Template ID

Billing Default Overrides

Invoice Form Cycle ID
 Payment Method Bill By ID
 Payment Terms Net 30
 Billing Inquiry
 Billing Specialist
 Billing Authority

Bill Line Summarization

Summarization Group Type
 Summarization Group ID

Use the **Bill Plan Detail Template** page to define default values that will be copied into the Bill Plan on the Contract.

Description – This field displays the description defined for the Billing Plan.

Bill Currency – Set to ‘Transaction Currency’.

Bill Unit – Define the agency business unit value.

Billing Type – Define the Bill Type for the invoices that will be created from this Bill Plan Template. Bill Type defines default values for the invoice and is required on the Bill Plan.

Bill Source - Define the Bill Source for the invoices that will be created from this Bill Plan Template. Bill Source defines default values for the invoice and is required on the Bill Plan.

Billing Default Overrides – Use this section of the page to override Billing Default values derived from the Billing Default Hierarchy.

Click the **Save** button to Save the Bill Template Detail Template.



Define Contract Products

Products are the key elements in a contractual relationship with a customer. Products can be defined for fixed-fee agreements (Amount-Based Contracts), cost reimbursement agreements (Rate-Based Contracts) or recurring fees or bills (Recurring Contracts).

In the Contracts module, a standard set of Products are defined, associated with a set of attributes that include pricing structure, tax parameters, and accounting information, and then used on Contract Lines to define the contractual obligation details.

For Contracts purposes, Products are Rate-based, Amount-based, or Recurring. Rate-based products have a Price Type of Rate, Amount-based products have a price type of Amount or Percent, and Recurring products have a price type of Recurring. The Price Type that you select for a Product determines the details that you define for that Product and the Billing and Revenue recognition methods with which you can associate the Product.

An Ad Hoc product is a product that is defined during the contract entry process. Ad Hoc products that are defined for a Contract are available for use only on the Contract from which they were created. Otherwise, an Ad Hoc product is essentially the same as a regular product.

Step 1 – Product Definition

Navigation: *Products > Identifying Product Details > Define Product and Attributes > Add a New Value*

Product Definition

Find an Existing Value Add a New Value

*SetID 29200 🔍

*Product ID LICENSE_FEE 🔍

Add

Set ID – Populate with the agency business unit number.

Product ID – Populate with a Product Identifier that represents the type of Product being added.

Click the **Add** button to enter a Product.

Product Definition Tab

SetID 29200 Product ID LICENSE_FEE

*Product Use
 Product Kit

*Description
 Long Description
 254 characters remaining

Catalog Number
 Model Number
 Product Brand
 *Physical Nature

*Status
 Product Category
 Where Performed

View Product Image VAT Default VAT Service Treatment Setup

Definition | Options | Options2 | Competitors | Contracts Options | Product Custom Info1 | Product Custom Info2 | Product Custom Info3

Use the **Definition** Tab to describe the Product.

NOTE: Not all fields in the Product Component are required for use in Contracts. Some Product properties are used in other system modules not used by the state. Only those fields that are required are described in this section.

Product Use – Select the product use as ‘Contracts Only’. The Products need only be defined for the Contracts Module.

Description – Define a description for the Product that can be seen on the Contract.

Status – Ensure the Product is ‘Active’.

Click the **Contracts Options** Tab.

Contracts Options Tab

Use the **Contracts Options** Tab to define how the Product will be used in a Contract.

Price Type – Select from a pre-defined list of Price Types (See **COR438 Contracts – Contract Definition Manual** for more explanation):

Amount – Select for Amount-Based Contracts

Rate – Select for Rate-Based Contracts using Project Costing

Recurring – Select for Recurring type Contracts

Recognition Method – Define the Revenue Recognition Method (See **COR438 Contracts – Contract Definition Manual** for more explanation):

As Incurred – Recognized revenue using Accounting Rules for rate-based contracts.

Billing Manages Revenue – Select to allow the Billing Module to book revenue accounting entries.

Milestone – Select to book revenue based on milestones like dates.

NOTE: Some Revenue Recognition Methods do not work with certain Price Types. See Guidelines, Concepts and Alternatives section in this manual.



Renewable – If the Product is to be renewable, **select** this checkbox and indicate whether the renewal will be ‘Automatic’ or ‘Manual’. This option is only available for Amount-Based Products (See **COR439 Contracts – Contract Processing & Administration Manual**).

Templates – Use this section of the page to default certain Bill and Revenue Plan Templates into the Contract when this Product is selected.

Click the **Save** button to Save the Product.



Step 2 – Product Unit of Measure

NOTE: Optionally, Define Product Unit of Measure values and List Price information for the Product. For List Pricing, the Unit of Measure must be populated for the Product. Only Contracts with for **Recurring** Products (Price Type) use a List Price.

Navigation: *Products > Identify Product Details > Attributes by UOM > Find an Existing Value*

Product Attributes by UOM

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

*SetID =

Product ID begins with

Description begins with

Product Use =

Model Number begins with

Catalog Number begins with

Tax Product Number begins with

Product Kit

Effective Status =

Item ID begins with

Case Sensitive

[Basic Search](#)

Use the **Search Criteria** to find the desired Product.

SetID – Select the agency value.

Product ID – The Product ID that will be assigned a Unit of Measure.

Description – Search by Product Description.

Click the **Search** button to retrieve Products matching the Search Criteria.

Product Attributes by UOM Page

Attributes by UOM

SetID 29200 ProductID LICENSE_FEE License Fee

Standard Unit of Measure

UOM Q | << < 1 of 1 > >> | View All

Default *UOM EA

Minimum Order Quantity

Pricing Option

Pricing UOM Yes

Maximum Order Quantity

Increment

Price

1-1 of 1 >>>

Minimum Selling Price	*Currency		
<input type="text"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Use the **Product Attribute by UOM Page** to select a unit of measure value for the Contract.

UOM – Select the unit of measure from a pre-defined list.

NOTE: The Unit of Measure defined for the Product will default into the Contract Line when the Product is selected.

Click the **Save** button to Save the Product UOM.



Step 3 – Product List Price

Navigation: Products > Identify Product Details > Assign List Price > Find an Existing Value

Product Price

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

*SetID =

Product ID begins with

Description begins with

Model Number begins with

Catalog Number begins with

Product Kit

Status as of Effective Date =

Item ID begins with

Include History Correct History Case Sensitive

[Basic Search](#)
[Save Search Criteria](#)

Use the **Search Criteria** to find the desired Product.

SetID – Select the agency value.

Product ID – The Product ID that will be assigned a List Price.

Description – Search by Product Description.

Click the **Search** button to retrieve Products matching the Search Criteria.



Product Price Page

Assign List Price

SetID 29200 Product ID LICENSE_FEE License Fee

Purchase in this UOM Q | << < 1 of 1 > >> | View All

Unit of Measure EA EACH

Purchase in this Ship From BU Q | << < 1 of 1 > >> | View All

Inventory Unit *Currency USD + -

Pricing Details

Q Q << < 1-1 of 1 > >> | View All

*Effective Date	*Status	List Price	Cost/Unit Usage	MSRP		
08/30/2024 <input type="text"/>	Active <input type="text"/>	5000.0000 <input type="text"/>	0.0000 <input type="text"/>	<input type="text"/>	+ <input type="text"/>	- <input type="text"/>

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

Use the **Product Price Page** to define List Pricing for a Product.

Currency – Populate with ‘USD’.

Effective Date – Select the date that the List Price is effective. This allows the user the opportunity to make changes to List price effective as of a certain date.

Status – Set to ‘Active’.

NOTE: When using List Pricing with a Recurring Product, the Unit of Measure on the Product must match the Unit of Measure from the Contract Line.

