

## Create a Customer Contract with Rate-Based Contract Line

### Purpose:

This job aid will help you create a Customer Contract with a rate-based contract line in Core-CT.

### Steps

### Screenshots

1. Navigate to the Contracts **General Information** page: **Nav Bar > Menu > Core-CT Financials > Customer Contracts > Create and Amend > Define Contract General Information**
2. Select the **Add a New Value** tab.
3. Use the lookup icons to select a valid **Business Unit** and **Sold To Customer**.
4. Enter a **Contract** name.
5. Select the **Contract Classification** as **Standard**.
6. Click the **Add** button.
7. Enter a description in the **Description** field.
8. Click the **Contract Type** lookup to select **GRANTS**.
9. Today's date will default in the **Contract Signed** field. Update, as necessary.
10. Validate that the **Contract Status** is **Pending**.
11. Click the **Lines** tab.

General Information

Find an Existing Value Add a New Value

---

General Information

Add a New Value Find an Existing Value

\*Business Unit: DOLM

\*Contract: NEXT

\*Sold To Customer:

\*Contract Classification:

Separate Fixed Billing and Revenue:

Separate As Incurred Billing and Revenue:

Add

Define Contract General Info

General Lines

Contract Number: NEXT Sold To Customer: Eastern Connecticut Workforce

\*Contract Status: PENDING

Copy From Contract    Add to My Contracts

Description:

Contract Admin: Federal Receivables & Reimbursemer

Region Code:

Contract Type: GRANTS

Currency Code: USD

Exchange Rate Type: CRRNT

Contract Signed: 04/17/2024

Contract Role:

Revenue Profile:

Use Project ChartFields:

Processing Status: Pending

Amendment Status:

Business Unit: Dept. of Labor

Contract Classification: Standard

Last Amended:

Last Update Date/Time:

Last Update User ID:

Separate Fixed Billing and Revenue:

Separate As Incurred Billing and Revenue:

Review Required for Revenue:

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12. A message displays that **1 item has been added to the contract**.

13. Click the **Return to Contract Lines** link.

General Information  
Add Contract Lines

Search

Product Group    Product Kits  
 Product   Renewable  
 Product Description   
 Price Type   
 Physical Nature

1 line(s) have been added to the contract

14. Enter a **Start Date** and **End Date**.

15. Click the **Save** button.

16. Click on the **Detail** tab.

Contract Lines

1-1 of 1

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

| Actions                                | Line | Product | Description   | Price Type | Hold Billing on Unpaid Cost | Hold Revenue on Unpaid Cost | Standalone Sale          | Bundle               | Start Date           | End Date             | *St |
|--|------|---------|---------------|------------|-----------------------------|-----------------------------|--------------------------|----------------------|----------------------|----------------------|-----|
| <input type="button" value="Actions"/> | 1    | DEP_FED | DEP - Federal | Rate       | <input type="checkbox"/>    | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | A   |

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

17. Click on the **Contract Terms** link.

Contract Lines

1-1 of 1

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         |
|--|------|---------|---------------|------------|---------------|--------------|---|--------------|----------------|-------------------------------|
| <input type="button" value="Actions"/> | 1    | DEP_FED | DEP - Federal | Rate       | Pending       | Pending      | <input type="button" value="Contract Terms"/> | Distribution | Internal Notes | Eastern Connecticut Workforce |

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


## Create a Customer Contract with Rate-Based Contract Line

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18. Click the **Add Contract Lines** button.

General | **Lines**

Contract Number NEXT 

Sold To Customer Eastern Connecticut Workforce  
Contract Status PENDING

**Add Contract Lines** Add Default Kit

19. Enter in product related to the business unit

20. Click the **Search** button.

General Information  
**Add Contract Lines**

Search ⓘ

Product Group    Product Kits  
 Renewable  
 Product  **Product Description**   
 Price Type    
 Physical Nature

[Create Adhoc Product](#) [Return to Contract Lines](#)

21. Select the product applicable to the business unit

22. Click the **Add Contract Lines** button.

Search Results ⓘ

General | Templates

|                          | Product               | Description                    | Price Type | Physical Nature | Product Kit | Fee Type | Start Date           | End Date             | Renewable | Renewal Action | Quantity                    | UOM                              |
|--------------------------|-----------------------|--------------------------------|------------|-----------------|-------------|----------|----------------------|----------------------|-----------|----------------|-----------------------------|----------------------------------|
| <input type="checkbox"/> | 11 DEP_FED            | DEP - Federal                  | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 12 DEP_OT             | DEP - Grant Trans for Projects | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 13 DOL_FED            | DOL - Federal                  | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 14 DOL_FIXED          | DOL Fixed Amount Inmd          | Amount     | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 15 DOT_DHS            | DOT - Dept Homeland Security   | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 16 DOT_FAA            | DOT - Federal Aviation Admin   | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 17 DOT_FEDOTH         | DOT - FED Other State Agencies | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 18 DOT_FHWA           | DOT - Federal Highway Admin    | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 19 DOT_FMCSA          | DOT-Federal Motor Carrier Safe | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 20 DOT_FRA            | DOT - Federal Railroad Admin   | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 21 DOT_FTA            | DOT - Federal Transit Admin    | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 22 DOT_USEDOT_OST     | DOT - Transportation Secretary | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 23 DPH_ET             | DPH - ExpndTrans for Projects  | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 24 DPH_FED            | DPH - Federal                  | Rate       | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |
| <input type="checkbox"/> | 25 DPH_FIXED_AMT_IMMD | FIXED_AMT_IMMD                 | Amount     | Goods           | N           | None     | <input type="text"/> | <input type="text"/> | N         |                | <input type="text"/> 1.0000 | <input type="button" value="Q"/> |

Select All  Clear All

Create Plans from Template  Combine Like Templates

Billing Plans  Revenue Plans  Renewal Plans

Billing Plans  Revenue Plans

**Add Contract Lines** [Create Adhoc Product](#) [Return to Contract Lines](#)

# Create a Customer Contract with Rate-Based Contract Line

## Steps

## Screenshots

32. Enter the **Billing Limit** in the **Total Billing** field.
33. In the **Contract Line Pricing** section, enter the **Billing Limit**.
34. Click the **Save** button.
35. Click the **Return to Contract Terms** link.

**Billing Allocation**

Contract: CON000150 Sold To Customer: 1 Eastern Connecticut Workforce  
 Business Unit: DOLM1 Currency: USD Contract Admin: Federal Receivables & Reimbursement

Contract Billing

Total Billing:  Unallocated Billing: 0.00

Fixed Billing

Fixed Billing:  Unallocated Fixed Billing: 0.00  
 Billing Discounts/Surcharges: 0.00 Inclusive Prepays: 0.00  
 Net Fixed Billing: 0.00 Allocation: Incomplete

**Contract Line Pricing**

| Retrieve Billing Price | Line | Product | Bundle | Price Type | Quantity | Billing Limit | Limit Check | Actions |
|------------------------|------|---------|--------|------------|----------|---------------|-------------|---------|
|                        | 1    | DEP_FED |        | Rate       | 1.0000   | 0.00          | Limit Check | Actions |

Line Totals

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

Return to Contract Terms

Save Return to Search Notify

36. The **Related Projects** tab displays.
37. The updated **Billing Limit** displays.

**Related Projects**

Contract Number: CON000150 Sold To Customer: Eastern Connecticut Workforce  
 Amendment Number: Contract Status: PENDING

Contract Line: 1 Price Type: Rate  
 Product: DEP\_FED  
 Description: DEP - Federal

PC Business Unit: DOLM1 Transaction Limits: Review Limits  
 Billing Limit:  Perform Limit Checking  
 Revenue Limit: 100.00 Retainage ID:   
 Discount ID:  Tiered Pricing:  Tiered Pricing

**Associated Rates**

| Effective Date | Status | Rate Selection | Rate Set |
|----------------|--------|----------------|----------|
| 1 04/17/2024   | Active | Rate Set       | DOL_100% |

**Associated Projects & Activities**

\*Project:  \*Activity:

Create Project Create Activity All Activities

Return to General Information Amount Allocation

Save Return to Search Notify Refresh Update/Display Correct History

# Create a Customer Contract with Rate-Based Contract Line

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23. Within the Detail tab, navigate through the Contract Line and Contract Term link.
24. Use the lookup to select **PC Business Unit**.
25. Enter the **Effective Date**.
26. Use the dropdown menu to select a **Rate Selection** (for Grants, normally select Rate Set).
27. Use the lookup icon to select **Rate Set** or **Rate Plan**.
28. Use the lookup icons to select **Project** and **Activity** (see **Step 30**) if associating an existing project).
29. Click the **Save** button.
30. Note: If associating an existing project, navigate to the old project's contract and delete the activity row by clicking the "-" button on the Associated Projects & Activities row. Then, go back to the new contract and select the activity with the associated project. View the **Unlinking a Project and Activity from an Existing Contract Job Aid** for more information.
31. Click the **Amount Allocation** link.

**Related Projects**

|                             |   |
|-----------------------------|---|
| Contract Number: CON0000150 | Sold To Customer: Eastern Connecticut Workforce |
| Amendment Number            | Contract Status: PENDING                        |
| Contract Line: < 1 >        | Price Type: Rate                                |
| Product: DEP_FED            |   |
| Description: DEP - Federal  |   |

PC Business Unit

Billing Limit

Revenue Limit

Discount ID

Transaction Limits
[Review Limits](#)

Perform Limit Checking

Retainage ID

Tiered Pricing
 [Tiered Pricing](#)

**Associated Rates**

|   | Effective Date | Status | Rate Selection | Rate Set             |          |     |
|---|----------------|--------|----------------|----------------------|----------|-----|
| 1 | 04/17/2024     | Active | Rate Set       | <input type="text"/> | Rate Set | + - |

**Associated Projects & Activities**

|   | *Project             | *Activity            |     |
|---|----------------------|----------------------|-----|
| ○ | <input type="text"/> | <input type="text"/> | + - |

Create Project

Create Activity

All Activities

Return to General Information

Return to Search

Notify

Refresh

Amount Allocation

Update/Display

Correct History

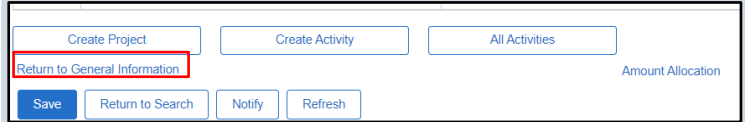
Save

# Create a Customer Contract with Rate-Based Contract Line

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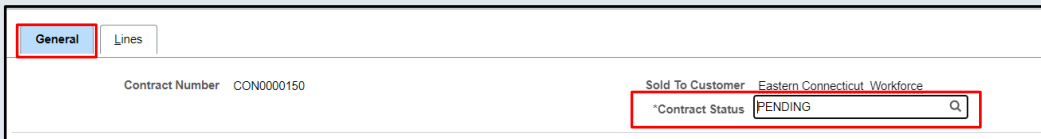
## Screenshots

38. Click the **Return to General Information** link.



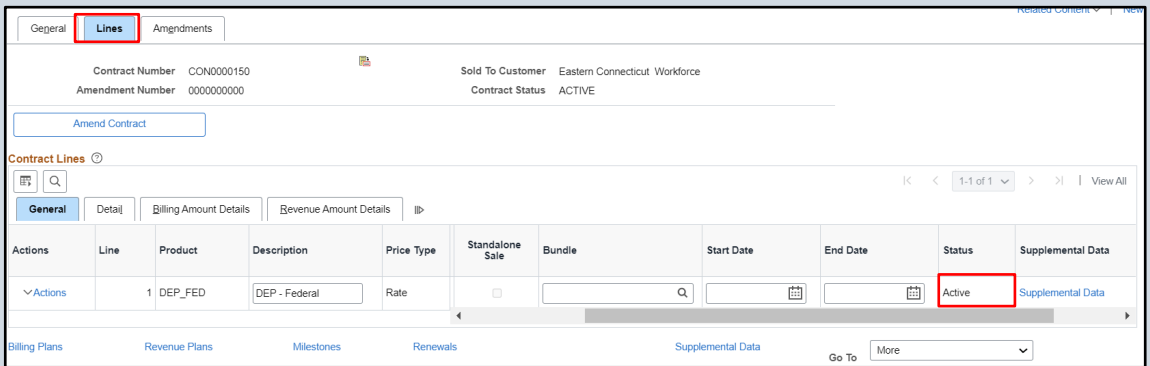
39. Select the **General** tab.

40. Click the **Contract Status** lookup button to select **Active**.

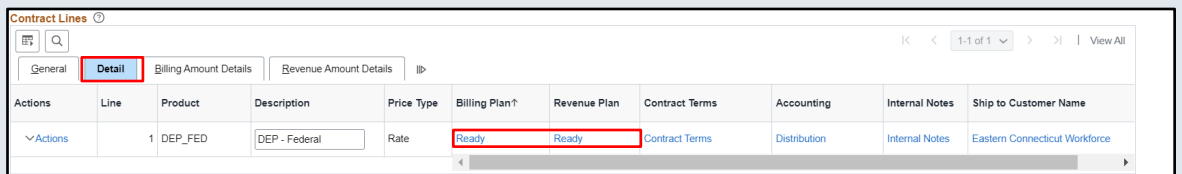


41. Click the **Lines** tab.

42. Validate that the **Status** is now **Active**.



43. Select the **Detail** tab to verify that the **Billing Plan** and **Revenue Plan** statuses are set to **Ready**.



## Create a Customer Contract with Rate-Based Contract Line

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44. Click the **General** tab.

45. Click on the grey arrow icon to expand the **Other Information** section.

46. Click the **Create Award Profile** button.

47. Click the **OK** button.

48. Click the **View Award Profile** link.

# Create a Customer Contract with Rate-Based Contract Line

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49. Select the **Funding** tab.
50. Enter the Project **Start Date** and **End Date**.
51. Click the **Save** button.
52. Click the **Department Credit** link.

The screenshot shows the 'Funding' tab selected in the top navigation bar. The main content area displays award details for 'CON000150'. Below this, there is a 'Funding Info' section with a table for project details. The table has columns for 'Period', '\*Start Date', '\*End Date', 'Funded Amount', 'To Project ID', 'Budget Posting Status', 'PC Distribution Status', and 'Attachments'. The first row shows '1' in the Period column, with red boxes highlighting the empty 'Start Date' and 'End Date' fields. Below the table, there are navigation links including 'Department Credit', which is highlighted with a red box. At the bottom left, a 'Save' button is also highlighted with a red box.

53. In the **Department** field, select a **Department** using the lookup.
54. Optional: Click the “+” button to add additional Departments.
55. Enter the **Credit %** for the department.
56. Ensure the entire grant is complete. Click the **Save** button.

The screenshot shows the 'Department Credit' tab selected in the top navigation bar. The main content area displays award details for 'CON000150'. Below this, there is a 'Department Credit' section with a table for department details. The table has columns for 'Department', 'Description', and 'Credit %'. The first row shows '1' in the Department column, with red boxes highlighting the empty 'Department' field (which has a search icon), the empty 'Credit %' field, and a '+' button to the right of the 'Credit %' field. Below the table, there are navigation links including 'Department Credit', which is highlighted with a red box. At the bottom left, a 'Save' button is also highlighted with a red box.



## Create a Customer Contract with Rate-Based Contract Line

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57. Optional: Enter the **Reference Number** and **Federal Award Identification Number**.

58. Enter a **Title**.

59. Select the **Award PI**.

60. Click on the **CFDA** link to select a CFDA number.

61. Enter the **Start Date** and **End Date**.

62. Verify that the **Project ID** displays at the bottom of the page.

**Award Profile**

[Award](#) [Eunding](#) [Resources](#) [Certifications](#) [Terms](#) [Milestones](#) [Key Words](#) [Funding Inquiry](#)

Award ID: CON0000150

Reference Award Number  Federal Award Identification Number

Title

Long Description

254 characters remaining

Award PI  [Reporting Role](#)

Sponsor: Eastern Connecticut Workforce

Post Award Administrator

Purpose

Status: Accepted

Award Type: Grant

Proposal ID  [View Proposal](#)

Version ID

Start Date

End Date

Hold Billing on Unpaid Cost  
 Hold Revenue on Unpaid Cost

[View Contract](#) [Contract Rates](#) [Additional Information](#) [Grant Administrator](#) [Sponsor Website](#) [CFDA](#) [Maintain Attachments \(0\)](#)

# Create a Customer Contract with Rate-Based Contract Line

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63. Click on the **Award** tab.

64. In the **Associated Project** section, click on the **Project** hyperlink.

Note: An error message displays if there is no project link at the beginning of the contract.

Associated Project

| PC Business Unit | Project                         | Description     | Project Start Date | Project End Date | Commitment Control Begin Date | Commitment Control End Date |
|------------------|---------------------------------|-----------------|--------------------|------------------|-------------------------------|-----------------------------|
| DPHM1            | <a href="#">DPH10010HUHENRI</a> | Hurricane Henri | 07/01/2021         | 07/01/2022       |                               |                             |

Go To: [Sponsor](#) | [Protocols](#) | [Attributes](#) | [Department Credit](#) | [Notepad](#) | [Award Modifications](#) | [Supplemental Data](#)

[Return to General Information](#)

[Award](#) | [Funding](#) | [Resources](#) | [Certifications](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [Department Credit](#) | [Funding Inquiry](#)

65. Use the lookup icon to select the **Project Status**.

66. Update the **Project Type**.

Establish Project General Info

[General Information](#) | [Project Department](#) | [Project Costing Definition](#) | [Primavera](#) | [Manager](#) | [Location](#) | [Phases](#) | [Approval](#) >

Project: DOL000000000000

\*Description: DOL BEGIN PROJECT - DO NOT USE  Program

\*Integration: DOLM1  Dept. of Labor

**Project Type**

Percent Complete: 0.00 As Of

Project Health:  As Of

Processing Status: Active

**Project Status:** [Project Status](#)

## Create a Customer Contract with Rate-Based Contract Line

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67. Click the **OK** button.

Auto-review for billing setting is being defaulted to the value in the changed project type (13100,400)

Check the value of "auto-review for billing" setting as the project type of the project is changed.

**OK**

68. Click the **Save** button.

**General Information** | Project Department | Project Costing Definition | Primavera | Manager | Location | Phases | Approval >

Project: DOL000000000000 [Add to My Projects](#)

\*Description: DOL BEGIN PROJECT - DO NOT USE  Program Processing Status: Active  
Project Status: Approved

\*Integration: DOLM1 Dept. of Labor  
Project Type: DOLFD Federal Grant Funds

Percent Complete: 0.00 As Of  
Project Health: As Of

**Project Schedule**

\*Start Date: 03/15/2022 \*End Date: 03/15/2022 [Additional Dates](#)

**Description** | 1 of 1 | View All

Date/Time Stamp: 04/17/24 4:08:55PM User ID: 130840

Description:

254 characters remaining

Long Description:

[Save as Template](#) [Copy Project](#)

My Projects | Project Valuation | Project Team | Project Activities | Go To: [More](#)

[Return to Award Profile](#)

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

## Create a Customer Contract with Rate-Based Contract Line

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69. Select **Project Department Tab**.

a. All fields should be defaulted from the project creation.

General Information | **Project Department** | Project Costing Definition | Primavera | Manager | Location | Phases >

Business Unit DOLM1 Project DOL00000000000 DOL BEGIN PROJECT - DO NOT USE  
 F&A Requested

**Primary Department Info**

Institution ID    
Subdivision    
Department    
Contact ID   Contact Details   
[Primary Department History](#)

**Department Info**  | < < 1 of 1 > > | View All

Effective Date 04/17/2024

**Department Info**  | < < 1-1 of 1 > > |

| *Department   | Subdivision | Description | Percentage Pledged   |                                  |                                  |
|---|-------------|-------------|----------------------|----------------------------------|----------------------------------|
| <input type="text"/> <input type="button" value="Q"/> |             |             | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Save as Template Copy Project

70. Click the **Save** button.

**Department Info**  | < < 1-1 of 1 > > |

| *Department   | Subdivision | Description | Percentage Pledged   |                                  |                                  |
|---|-------------|-------------|----------------------|----------------------------------|----------------------------------|
| <input type="text"/> <input type="button" value="Q"/> |             |             | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Save as Template Copy Project

**Save** Return to Search Refresh Add Update/Display Include History Correct History

## Create a Customer Contract with Rate-Based Contract Line

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71. Update F&A % Rate of the Project & Activity for the Award.

a. Navigate to **Nav Bar > Menu > Core-CT Financials > Grants > Awards > Update Project Activity > Select FA Rates Tab.**

b. Click **Facilities Admin Rate** Lookup icon > Select **“Grants”**

c. Click **FA Base** Lookup icon > Select **“SAL”** under Funded.

d. Select **Effect Date** under Funded Rate. Ensure **FA Rate %** populates correctly.

The screenshot displays the 'Update Project Activity' interface. At the top, there are tabs for 'General Information', 'Definition', 'FA Rates', 'Location', 'Attachments', 'Quality', 'User Fields', and 'Rates'. The 'FA Rates' tab is selected and highlighted with a red box. Below the tabs, the 'Project' is identified as 'DOL000000000005' and the 'Activity' as '147501'. There is a dropdown for 'FA Rate Status' and a checkbox for 'Hold'. The main section is titled 'F&A Rate Info' and contains three sub-sections: 'Facilities Admin Rate', 'Institution Rate', and 'Sponsor Rate'. Each sub-section has a search field and a 'Grants Rat' field. The 'Funded Rate' section is highlighted with a red box and shows 'FA Base' as 'SAL', 'Eff Date' as '07/01/2018', and 'FA Rate %' as '33.00'.

72. Click the **Save** button.

The screenshot shows a navigation bar with several buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Add', and 'Update/Display'. The 'Save' button is highlighted with a red box.