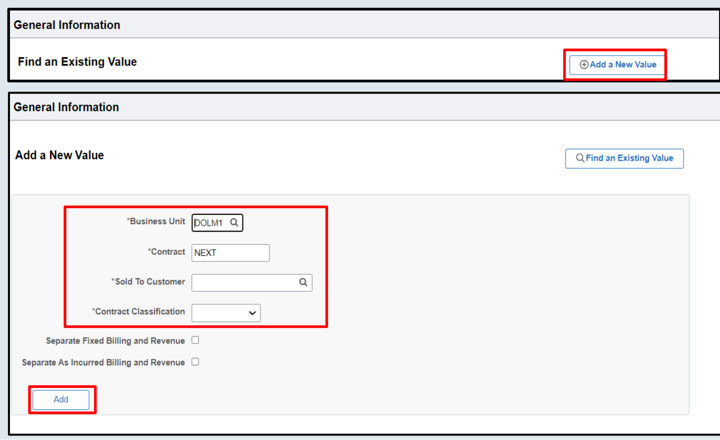
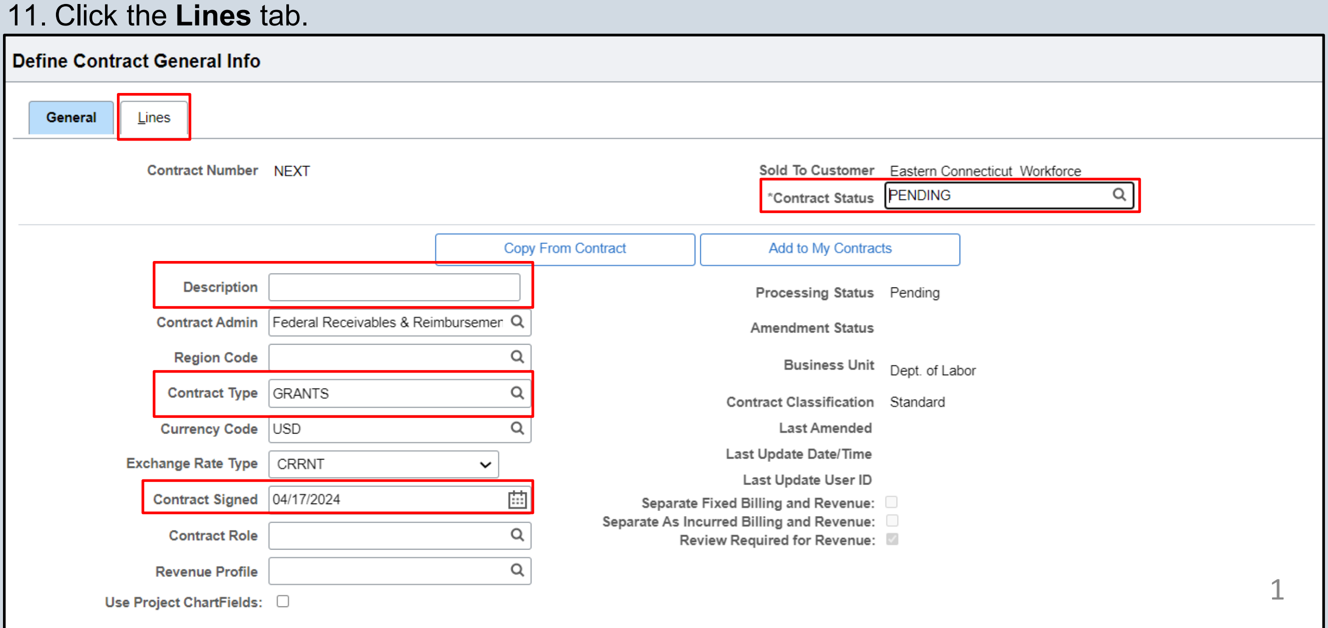
Create a Customer Contract with Rate-Based Contract Line

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.



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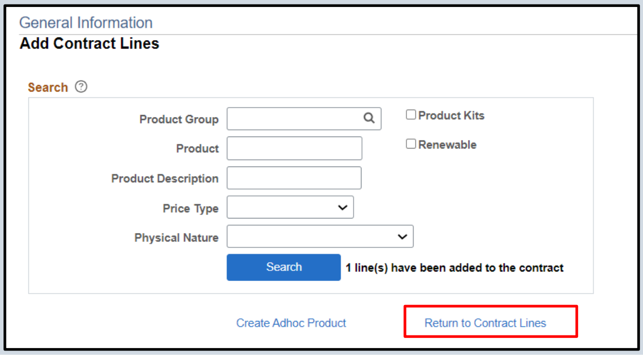
12. A message displays that **1 item has been added to the contract**.

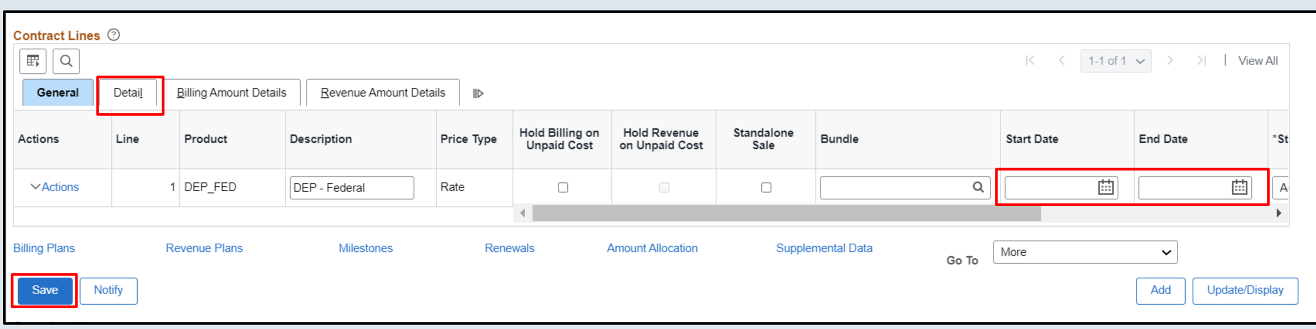
13. Click the **Return to Contract Lines** link.



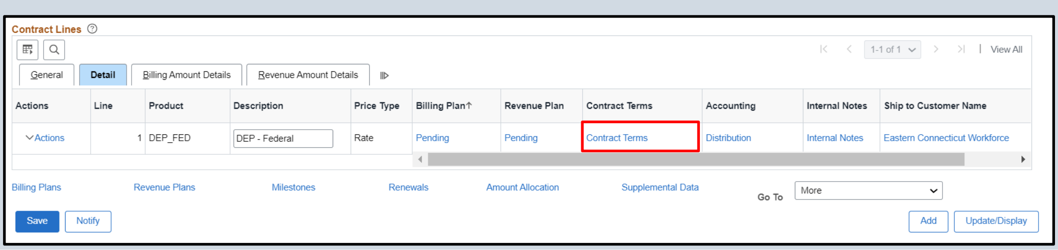
14. Enter a **Start Date** and **End Date**.

15. Click the **Save** button.

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



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



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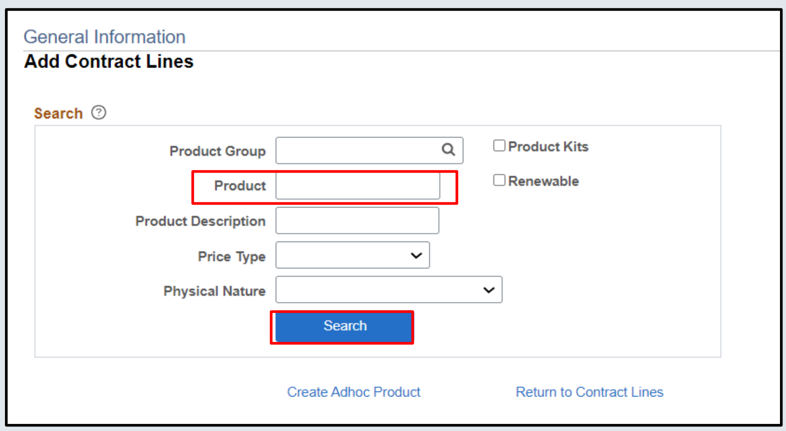
18. Click the **Add Contract Lines** button.

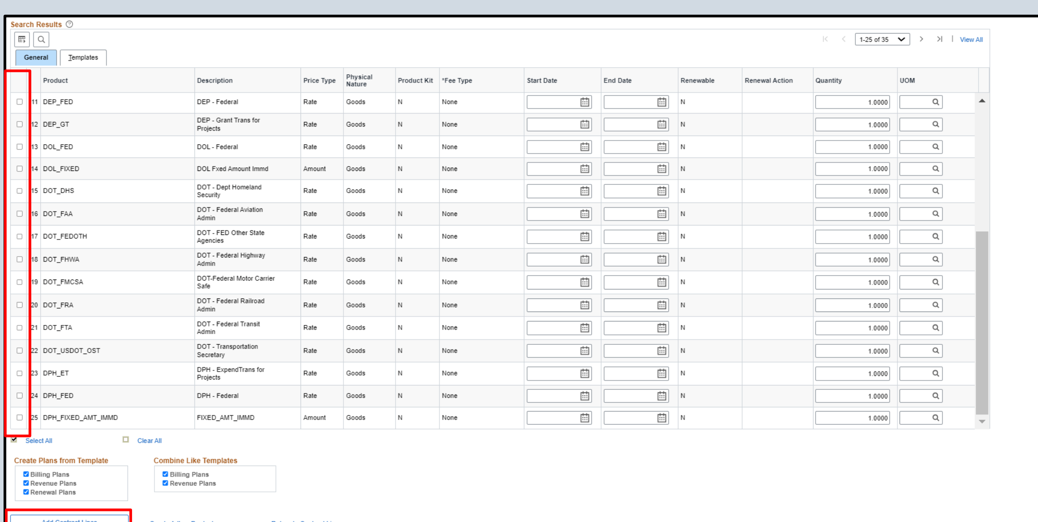
19. Enter in product related to the business unit

20. Click the **Search** button.



21. Select the product applicable to the business unit

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



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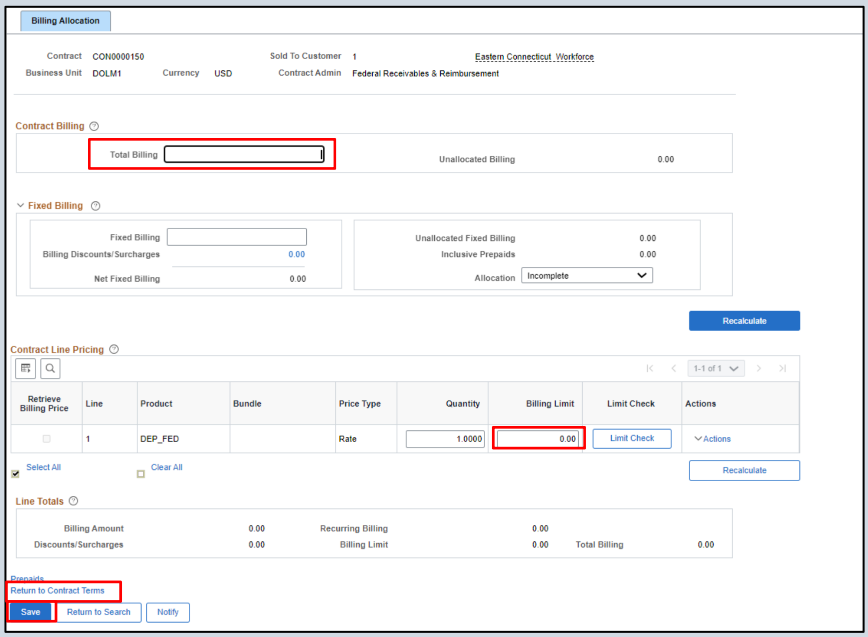
32. Enter the **Billing Limit** in the **Total Billing** field.

33. In the **Contract Line Pricing** section, enter the **Billing Limit**.

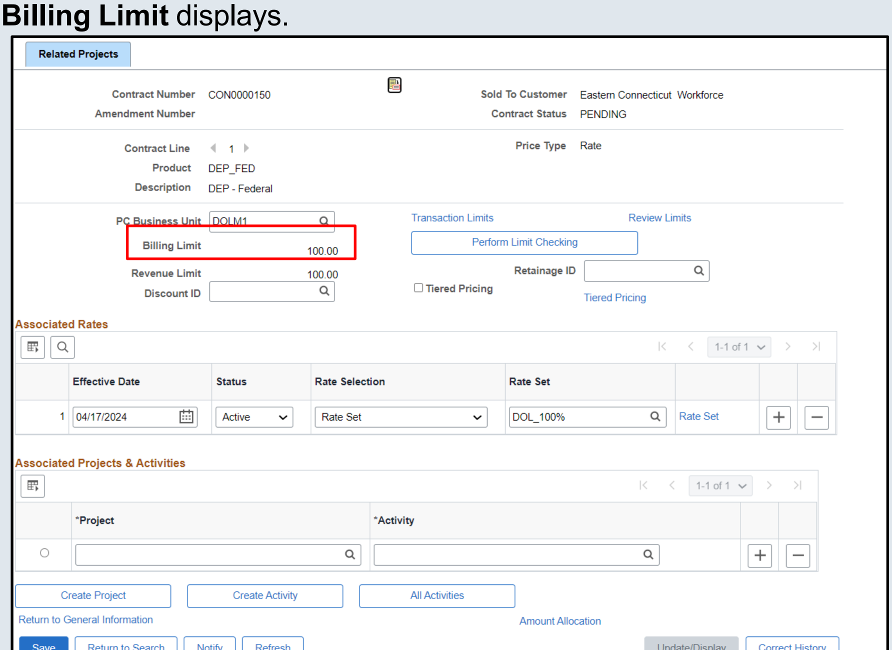
34. Click the **Save** button.

35. Click the **Return to Contract Terms** link.



36. The **Related Projects** tab displays.

37. The updated **Billing Limit** displays.



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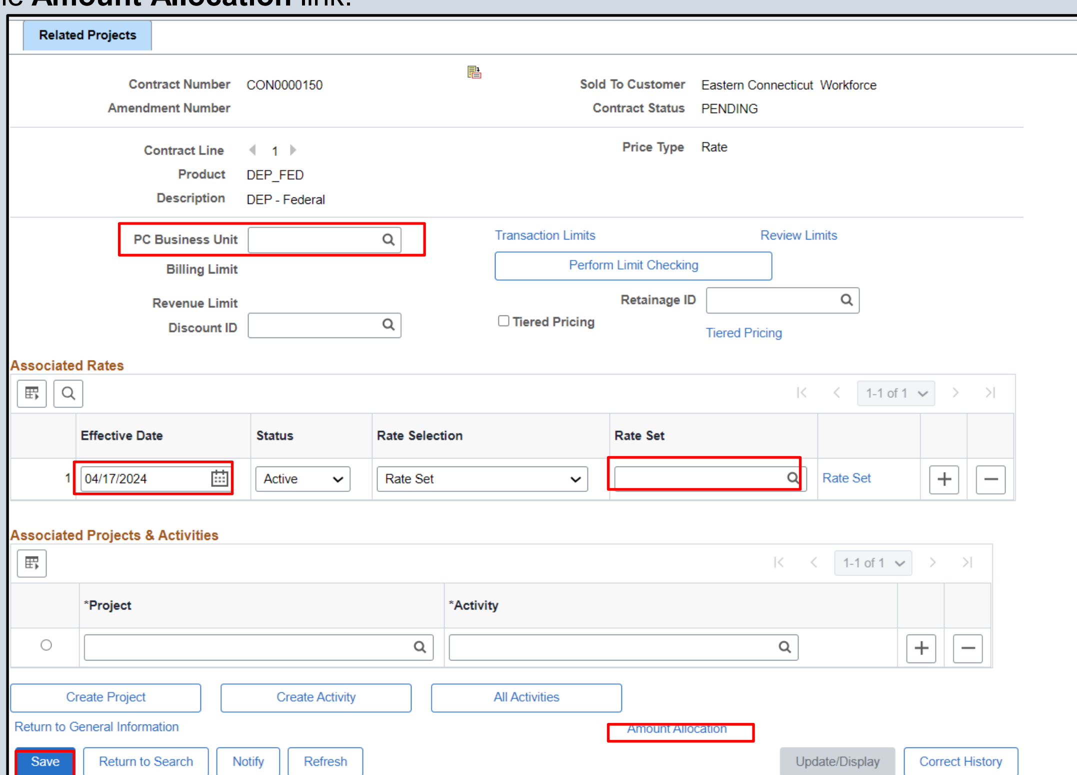
23. Within the Detail tab, navigate through the Contract Line and Contract Term link.
24. Use the lookup to select **PC Business Unit**.
25. Enter the **Effective Date**.
26. Use the dropdown menu to select a **Rate Selection** (for Grants, normally select Rate Set).
27. Use the lookup icon to select **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.



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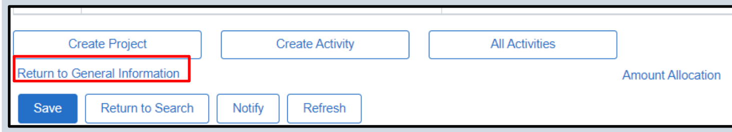
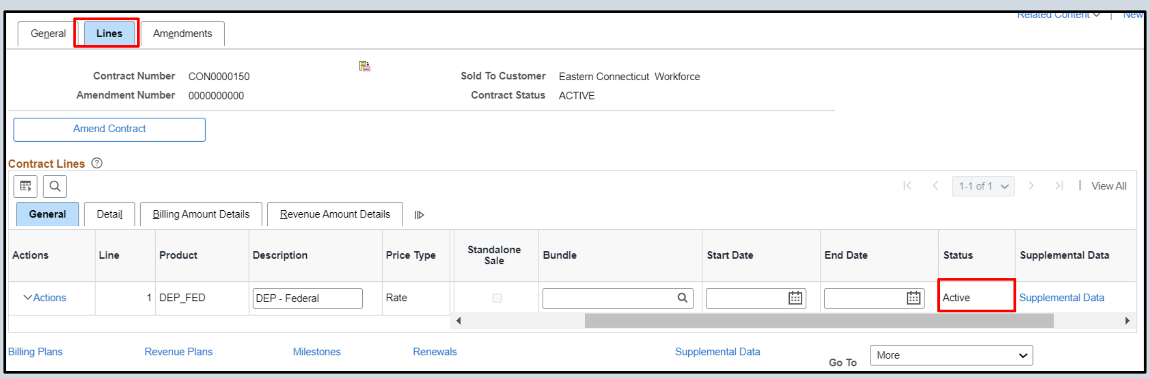
Steps	Screenshots
38. Click the **Return to General Information** link.	

39. Select the **General** tab.

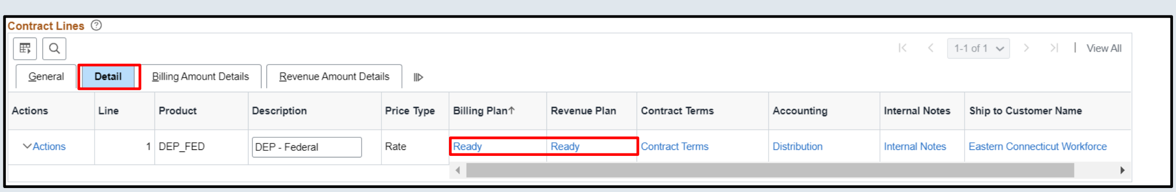
40. Click the **Contract Status** lookup button to select **Active**.

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**.



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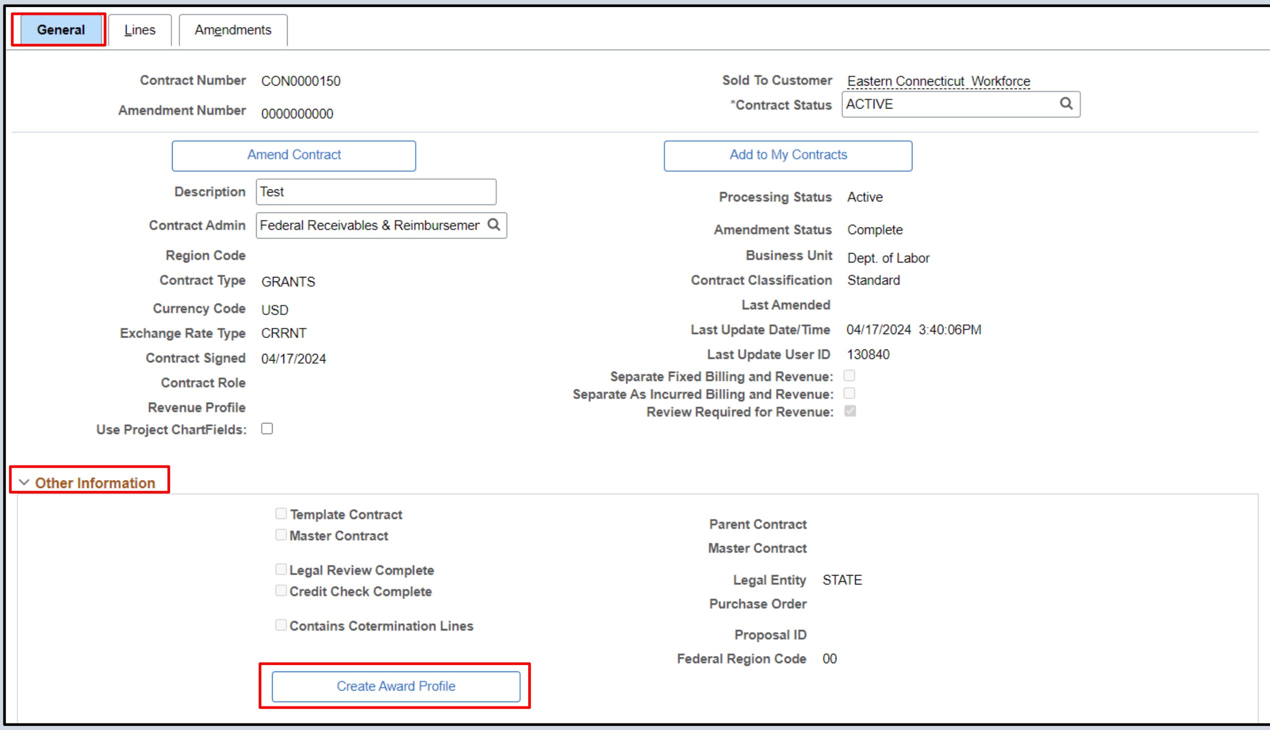
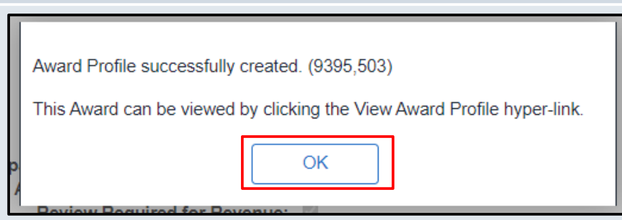
44. Click the **General** tab.

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

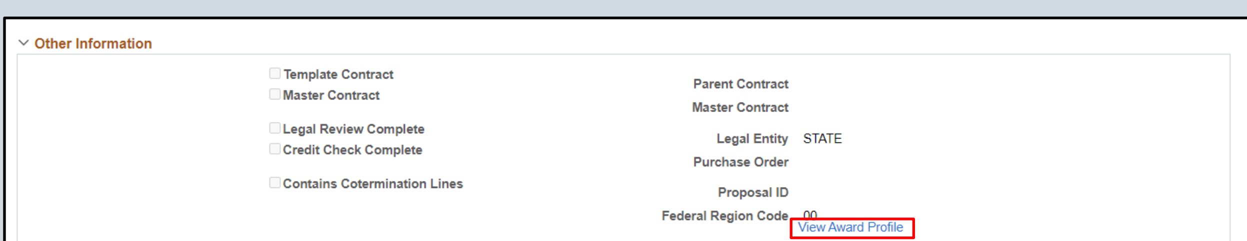
46. Click the **Create Award Profile** button.



47. Click the **OK** button.



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



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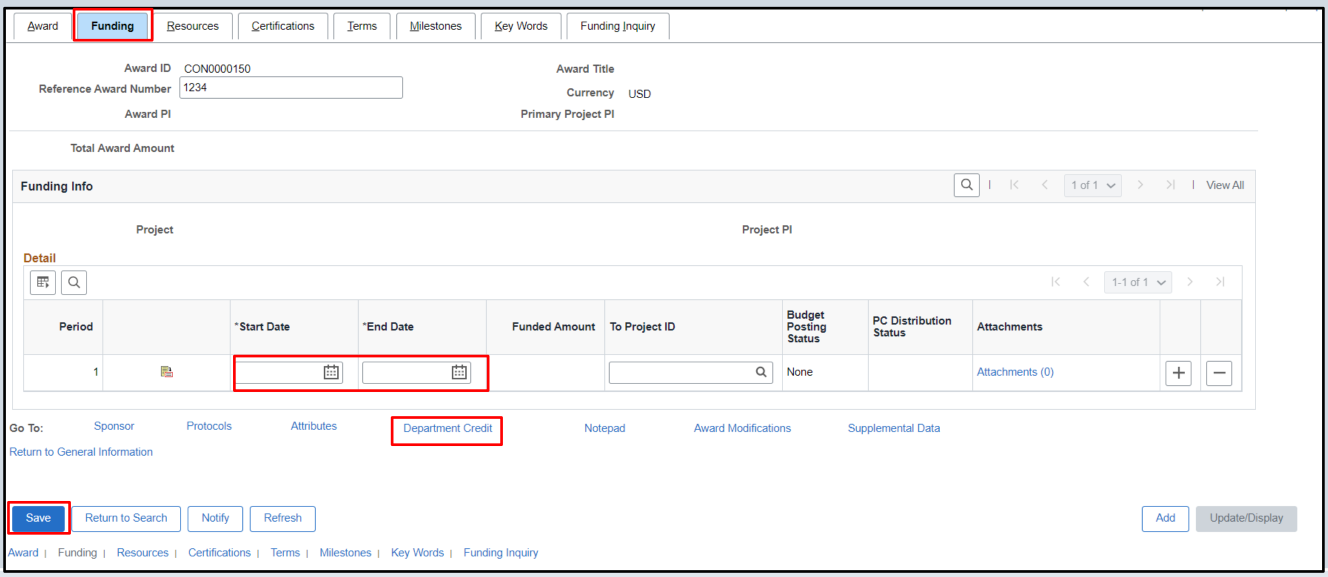
49. Select the **Funding** tab.

50. Enter the Project **Start Date** and **End Date**.

51. Click the **Save** button.

52. Click the **Department Credit** link.

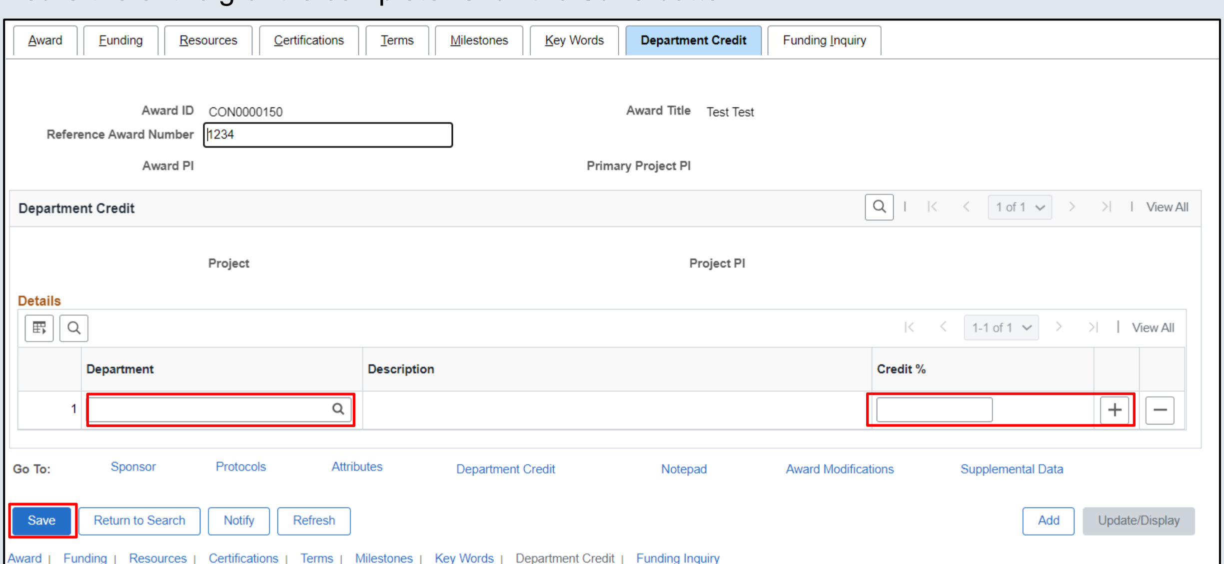


53. In the **Department** field, select a **Department** using the lookup.

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.



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

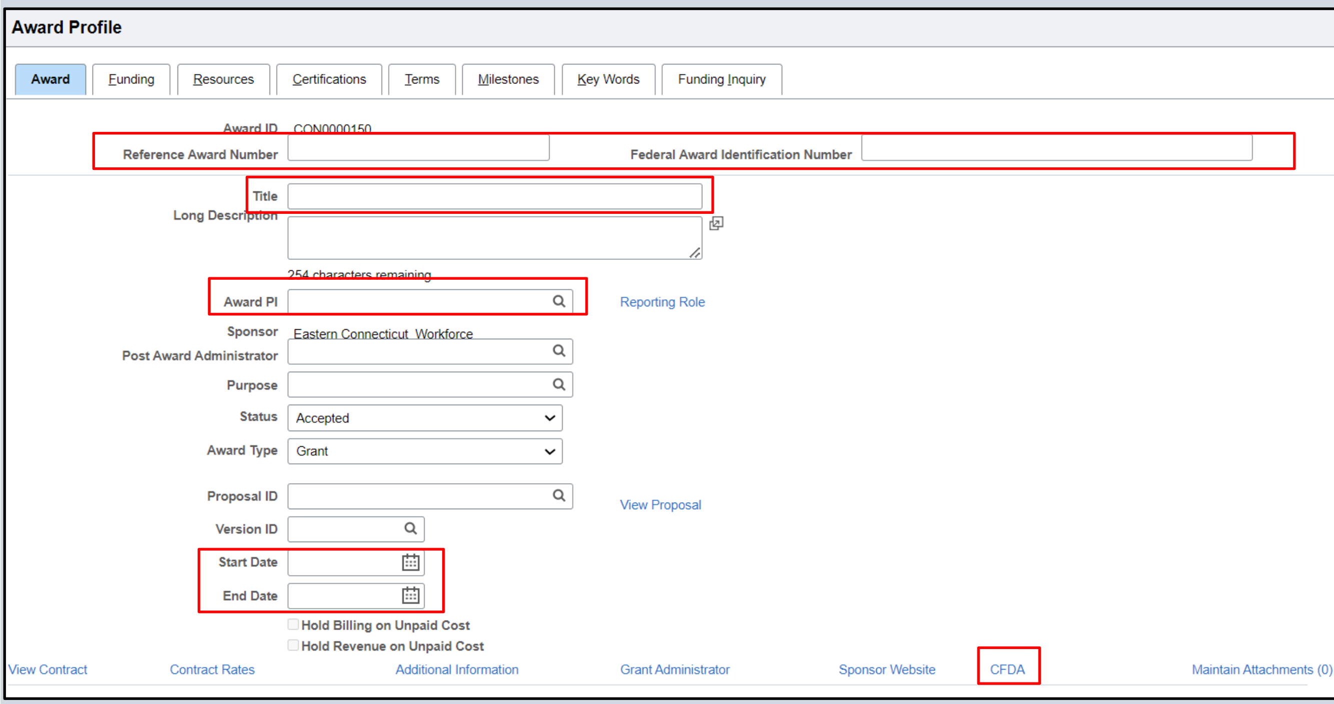
58. Enter a **Title**.

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.



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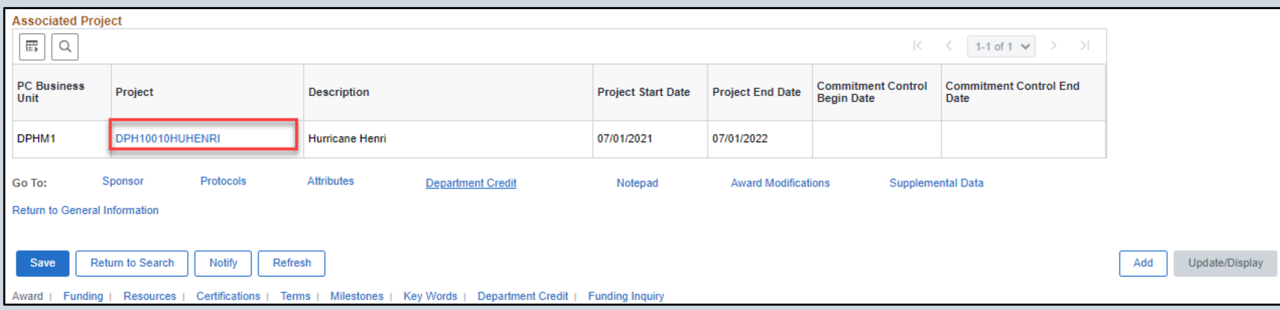
63. Click on the **Award** tab.

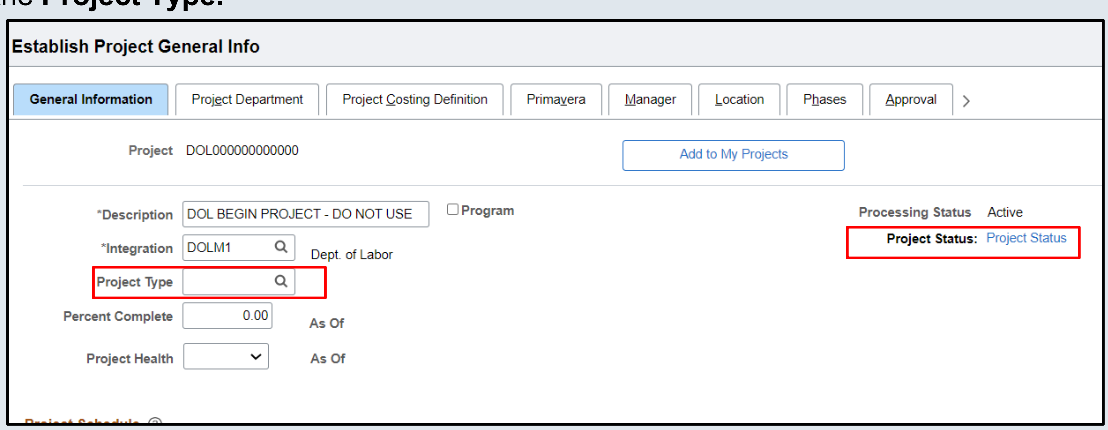
64. In the **Associated Project** section, click on the **Project** hyperlink.

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



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

66. Update the **Project Type.**



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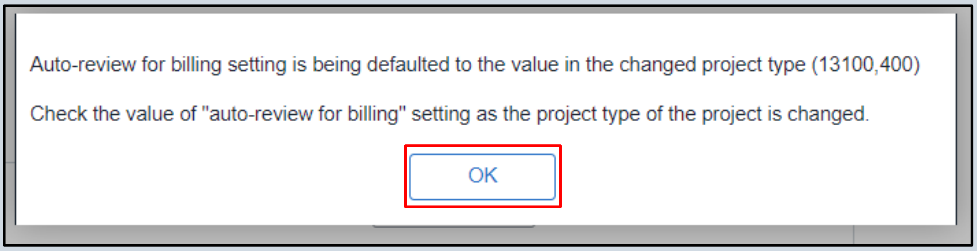
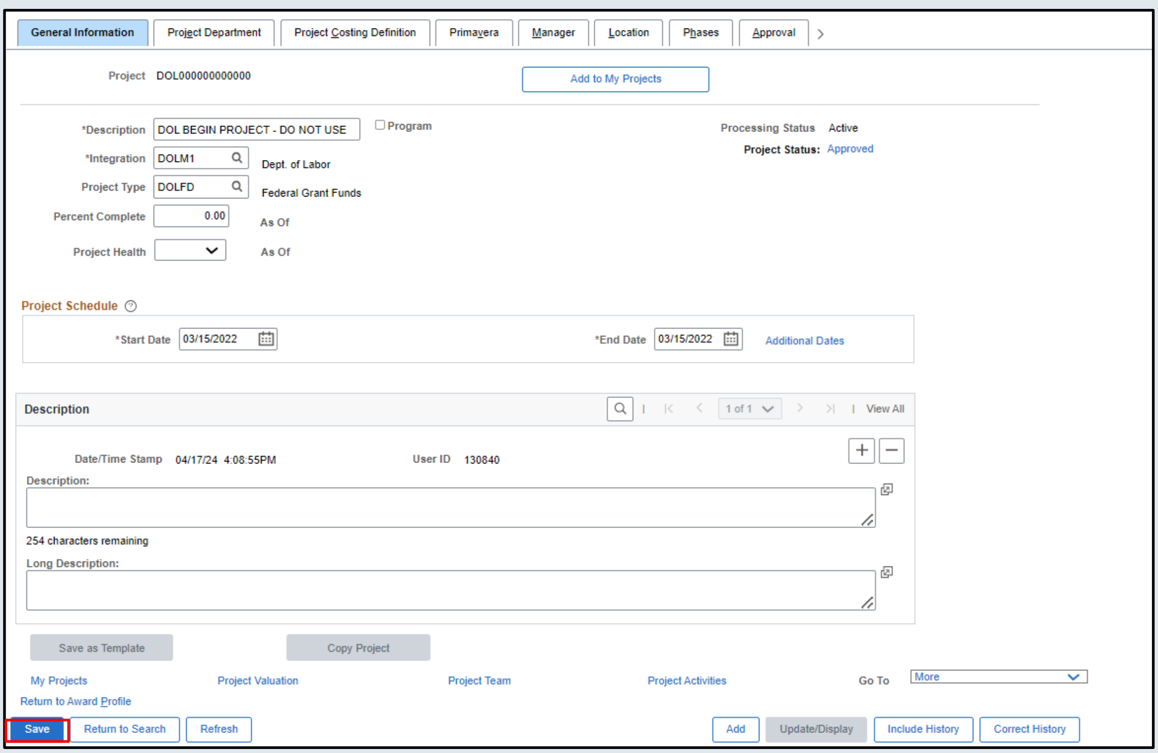
67. Click the **OK** button.



68. Click the **Save** button.



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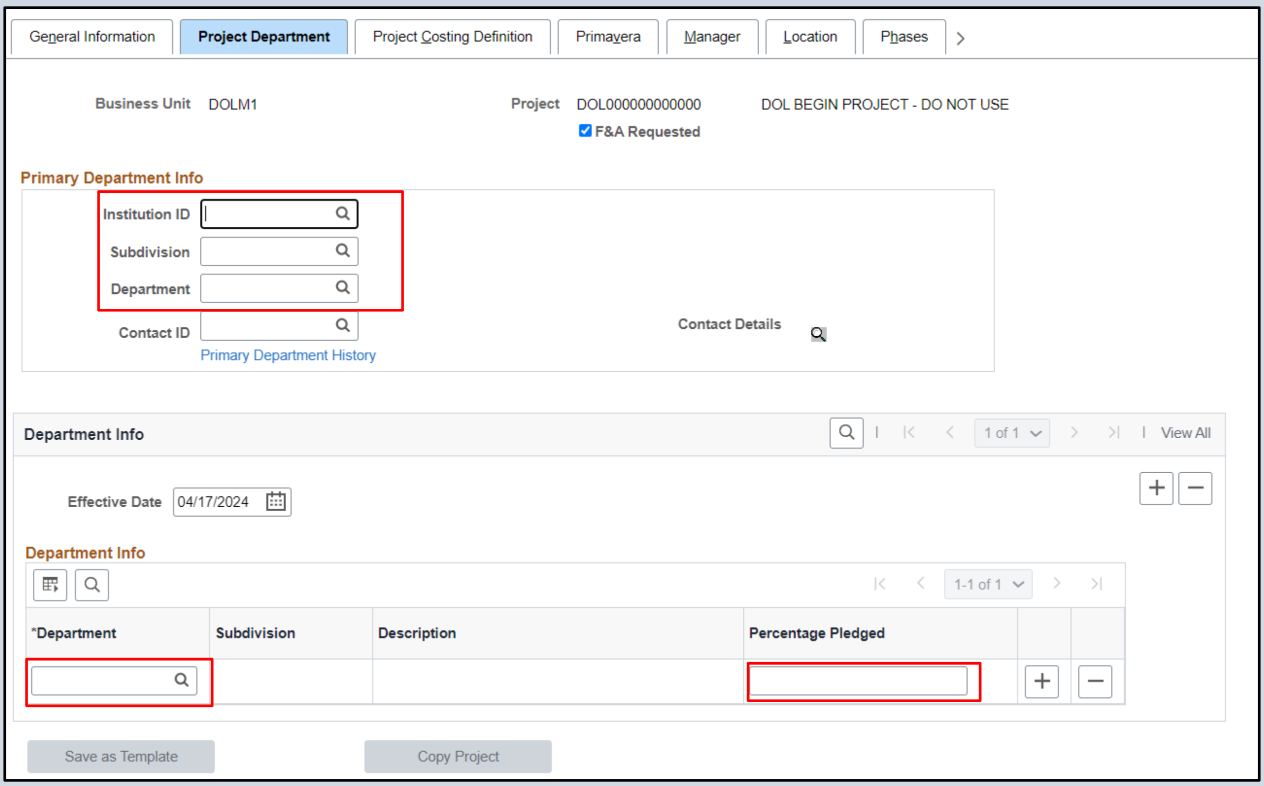
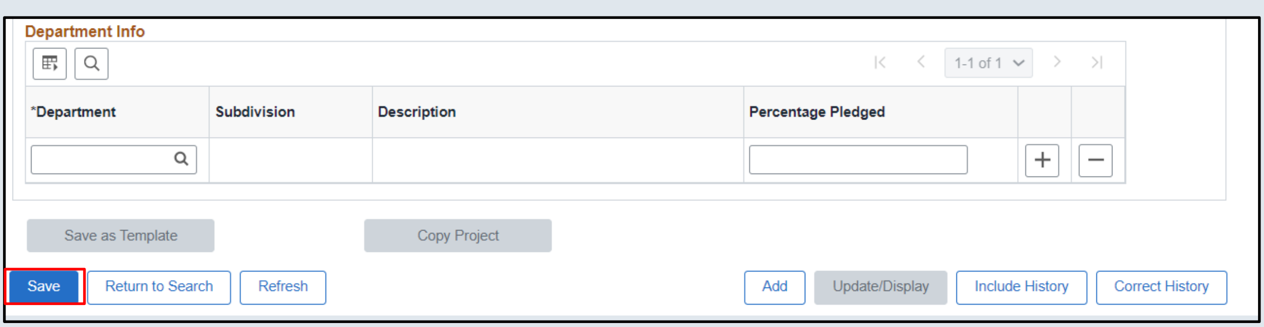
69. Select **Project Department Tab**.

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



70. Click the **Save** button.



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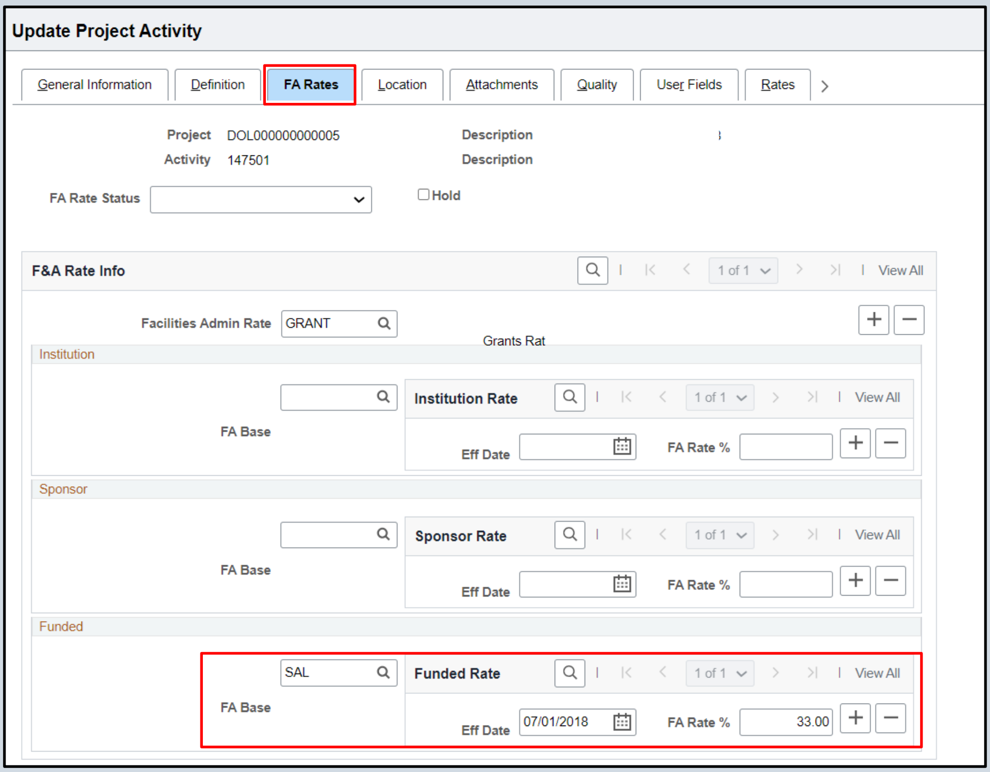
71. Update F&A % Rate of the Project & Activity for the Award.

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.



72. Click the **Save** button.