Contract Management

User Guide

Planview ChangePoint 2022

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Contents

1. Contract Setup **7**

About contracts 7
Accessing a contract 7
About specifying limits for amounts and effort to be invoiced 7
About audit tracking 8
Creating a contract 8
Create/Edit Contract dialog, General tab options 9
Adding a purchase order to a contract 11
Specifying contract information for a contract 11
Create/Edit Contract dialog, Details tab options 12
About editing a contract 12
Editing a contract 14
Deleting a contract 15
About copying contracts 15
Copying a contract 15
Copy Contract dialog, Additional information to copy options 16
About copying date-based information for contracts 18
Contract troubleshooting 18

2. Contract Billing Information **21**

Entering billing information for contracts 21
Create/Edit Contract dialog, Billing information tab options 21
Setting up email recipients for batch invoicing 26
About billing types for contracts 27
About invoice formats for contracts 28
About billing addresses for contracts 28
Adding a purchase order to a contract 28
About billing rates for contracts 29
Copying or updating billing rates from the billing office 30
Setting up a billing rate for a contract 30
Create/Edit Contract dialog, Billing rates tab options 31
About burden rates used in billing rates 33
Editing billing rates 33
Deleting a billing rate 33
About setting up split billing 34
Setting up split billing on a contract 35

Editing split billing for a contract 36
Setting up split billing for a product or a fixed fee 36
Editing split billing for a product or a fixed fee 37
About scheduling fixed fees for the contract 38
Creating a fixed-fee schedule 38
Create/Edit Contract dialog, Fixed-fee schedule tab options 38
Editing a fixed-fee schedule 40
Deleting a fixed-fee schedule 41
Adding recurring fixed-fee schedule items 41
Auto-Add Schedule Items (Fixed Fee) dialog box options 42
Setting up split billing for recurring fixed-fee schedule items 44
Editing split billing for recurring fixed-fee schedule items 45
Adding a fixed-fee schedule item manually 45
Editing a fixed-fee schedule item 46
Deleting a fixed-fee schedule item 46
About adding a product to a contract 47
About creating products for which the quantity will be specified during invoicing 47
About scheduling product costs 47
Adding a product to a contract 47
Create/Edit Contract Product schedule dialog, tab options 48
Editing a product associated with a contract 50
Deleting a product associated with a contract 50
Adding recurring product schedule items to a contract 51
Auto-Add Schedule Items (Product) dialog box options 52
Setting up revenue recognition in a contract 54
Create/Edit Contract dialog, Revenue tab options 54
Setting up revenue recognition for a fixed-fee deliverable 56
Setting up revenue recognition for a fixed-fee schedule item 57
Setting up revenue recognition for a product 57
Setting up revenue recognition for a product schedule item 58
Adding milestones for a product or fixed-fee schedule 58
Milestone options for products and fixed-fee schedules 59

3. Contract Approvals, Access and Other Details 61

About specifying approvals for contracts 61
Specifying time and expense approvers for a contract 61
Create/Edit Contract dialog, Approvals tab options 62
Managing access to a contract 63
About request processing rules 64
Setting up a request processing rule 64

Create/Edit Contract dialog, Request processing rules tab options 65
About editing request processing rules 66
Editing a request processing rule 66
About deleting request processing rules 66
Deleting a request processing rule 67
Specifying a request SLA for a contract 67
Create/Edit Contract dialog, Request SLA tab options 68
About request SLA escalation 69
Editing a request SLA for a contract 69
Deleting a request SLA for a contract 69
Specifying default work locations and work codes for a contract 70

Index **71**

1. Contract Setup

About contracts

Contracts define the billing, contract information, split billing, revenue recognition and approval rules for customer projects. You can create multiple contracts for each customer, and multiple projects for each contract. You must set up contracts before you can create projects.

Accessing a contract

1. Click **Contracts**.

   The **Contracts** list view appears.

2. Select the contract.

   The contract profile appears.

About specifying limits for amounts and effort to be invoiced

You can specify limits for billing amounts, effort, and quantities to be invoiced for a contract. You can configure each limit to display a warning and/or to reject the invoice if the limit is exceeded.

You can set the limits for the following items:

- Billing amounts for all items
- Billing amounts for time
- Billing amounts for request time
- Billing amounts for products
- Billing amounts for expenses
- Billing amounts for fixed fees
- Billing amounts for additional items
- Effort for time (project-related)
- Effort for request time
- Quantity of products

- Quantity of expenses

About audit tracking

You can enable auditing if you require additional tracking of changes to a contract and its projects, tasks, time entries, and expenses. When you enable auditing, the following tracking requirements are enforced:

- time entries for project tasks and requests must include descriptions
- changes to time entries that have been approved or rejected must include a comment
- expenses must have include a description, and all changes to expense entries must include a comment
- changes to time and expense entries are tracked in the history
- rejected time entries, expense line items, and expense reports must include a reason for the rejection, which is tracked in the history
- changes to rates must include a comment
- invoices must include descriptions

In addition, changes to the following contract fields are tracked:

- Main contact
- **Details** tab – Contract amount, Contract type, Contract start date, Contract end date
- Split billing status
- Billing address
- date to use for tax calculation

The **Audit** check box is available only if the option has been enabled on the billing office for the contract.

Note: After auditing has been enabled for a contract, you cannot disable it.

Creating a contract

You can create a contract by completing and saving the mandatory general information first and then adding to the contract as required.

1. Click **Contracts**.

The **Contracts** list view appears.

2. Click > **Contract**.

   The **Create Contract** dialog box displays the **General** tab.

3. Complete the fields as required. For more information, see "Create/Edit Contract dialog, General tab options" on page 9.

4. Click **Save**.

5. To complete the contract, see the following topics:

   - "Create/Edit Contract dialog, Details tab options" on page 12
   - "Create/Edit Contract dialog, Billing information tab options" on page 21
   - " Create/Edit Contract dialog, Approvals tab options" on page 62
   - "Managing access to a contract" on page 63
   - Projected resources topics in the *Resource Management User Guide*

Create/Edit Contract dialog, General tab options

Option	Description
Customer type-ahead field	Customer for the contract.
Main contact list	Contact from the customer. Default recipient for invoices sent by email.
Contract name field	Name of the contract.
Alternate name field	Alternate name for the contract.
Description field	Description of the contract.
Billing office type-ahead field	Billing office for the contract, which controls the billing and cost rates and workflow information.
Contract status list	Status of the contract.

Option	Description
Contract manager type-ahead field	Resource responsible for managing the contract. The contract manager is responsible for approving all invoices related to the contract.
Staffing workgroup type-ahead field	Staffing workgroup for the contract, which is used for resource demand calculations. By default, this is the workgroup of the contract manager.
Contract category list	Category of the contract.
Contract ID field	ID of the contract.
Work performed for type-ahead field	Customer for which the work is performed, if different from the one specified in the **Customer** field.
Associated Contract type-ahead field	The contract associated with, or the contract template used to create, the current contract.
Additional contact field	Additional customer contact such as a project sponsor.
Internal contact type-ahead field	Name of the resource from your organization who interacts with the customer.
Request field	Request number of the originating request, if applicable.
Opportunity list	Updates the contract fields with data from the selected opportunity. Used when the contract results from an opportunity.
Enable auditing check box	When selected, additional audit requirements are enforced. For more information, see "About audit tracking" on page 8. **Note:** Once you save the contract with auditing enabled, auditing cannot be disabled.
Template check box	When selected, identifies the contract as a template.

Option	Description
Support desk list	The default support desk to handle issues for the contract, which automatically displays on the requests created for this contract.
Allow support desk override check box	When selected, resources can change the support desk for requests for the contract.
Consider request time as a capital cost check box	When selected, the time entered for requests for the contract are designated as capital costs.

Adding a purchase order to a contract

You can add one or more purchase orders to a contract. You must specify one of the purchase orders as the default purchase order. The default purchase order number appears by default on the invoices for the contract, but can be changed to a different purchase order number for the same contract.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing information** tab.
3. In the **Purchase order number** table, click **Add new**.
4. Type the purchase order number into the new row.
5. To specify the purchase order number as the default one for the contract, select the **Default** check box.
6. Click **Save**.

Specifying contract information for a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Details** tab.
3. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Details tab options" on page 12.

4. Click **Save**.

Create/Edit Contract dialog, Details tab options

Field	Description
Contract number field	Contract number
Contract amount field	Total monetary amount to be generated by the contract, excluding taxes. If the **Use two-level approval on contract overage** check box is selected on the **Approvals** tab, this amount is checked against the invoiced amounts. This amount also determines when threshold warning emails and ChangePoint notifications are sent.
Contract type list	Type of contract contract.
Contract start date field	Start date.
Contract end date field	End date.
Contract limits section	Maximum amounts for billing amounts, effort, and quantities for the invoice items. For more information, see "About specifying limits for amounts and effort to be invoiced" on page 7.
Updates field	Reasons for changes made to the contract, main contact, or billing address.
History field	Displays the changes made to several fields. For more information, see "About editing a contract" on page 12.

About editing a contract

This topic describes the general guidelines and rules for editing contracts.

Changing the contract status

The list of available contract status options is determined by your organization. Changing the contract to the following statuses affects the contract as follows:

- **Prospect** – Work with the customer begins.

- **Probable** – The contract negotiations begin.
- **Booked** – The contract is signed.
- **Work in progress (WIP)** – The contract is being worked on and billing can begin, where applicable.
- **Completed** – The contract is completed. If there are projects under the contract in **Draft** or **Active** status, a warning message displays. The status of the projects, however, does not automatically change. To prevent resources from entering time or expenses against completed projects and tasks, you must edit the projects and tasks manually to mark them as **Completed** or **Inactive**.
- **Inactive** – all projects with **Active** status are set to **Inactive**. The project manager for each affected project is notified of the change by email. No new projects can be created for the contract, and the status of existing projects cannot be changed. If the contract status is subsequently changed to an active status, you can reactivate the projects manually.
- **Closed** – all projects with **Active** status, are set to **Completed**, and tasks are marked as **Completed** and **Locked**. The project manager for each affected project is notified of the change by email. No new projects can be created for the contract, and the status of existing projects cannot be changed. If the contract status is subsequently changed to an active status, you can reactivate projects and tasks manually.

Locking contracts

When a contract is being edited, and when a contract is selected during the invoicing process, the contract is locked to prevent problems with several resources making changes at the same time.

Changing the billing office

Only the contract manager can change the billing office, and only when there is no billing in process. All invoices must be either committed, sent, partial paid, paid or archived, and all the time, expenses, request time, requests, contractproducts and fixed-fee records must be fully invoiced.

When you change the billing office, you can choose to remove all existing billing rates and projected resources from the contract, or keep the existing billing rates and projected resources.

Changing the billable status

When you change the billable status for a contract, and the option to allow project managers to override the billable status *is not* selected, then the billable status is changed accordingly for all of the existing projects, tasks, and request processing rules for the contract.

If the option to allow project managers to override the billable status is selected, then the billable status for all of the existing projects, tasks, and request processing rules for the contract remains the same.

Changing the currency or revenue recognition method

After revenue has been recognized for a contract, no changes are allowed to the selected currency or the revenue recognition method for fixed fees or products. The billing amounts cannot be reduced to less than the revenue already recognized.

Changes to split billing

The **Split billing** option on the **Billing information** tab can be changed only if no invoices have been created or if all existing invoices have been committed.

If **Split billing** has been selected for a contract:

- The **Billable** option cannot be changed if there are any invoices under the contract or phantom contract which are **Draft**, **Pending approval**, **Pending second-level approval**, and **Approved** or if all invoices are committed, but there are time, expenses, request time, requests, contractproducts, and/or fixed fee schedules under the contract or phantom contract that have not been fully invoiced.
- The **Billing office** field in the **General** tab and **Billing type** field in the **Billing information** tab can be edited only when all line items for the contract or phantom contract are all fully invoiced.

Editing a contract

1. Access the contract.
2. Click ⋮ > **Edit**. The Edit Contract dialog box appears.
3. Make the necessary changes.
4. Click **Save**.

Deleting a contract

It is recommended that you keep contracts for historical data purposes. However, you can delete a contract provided that the following are true:

- the contract status is **Closed**
- all billable items such as time and expenses have been invoiced and the invoice has been archived
- there are no projects for the contract in **Draft** or **Active** status
- billing status of the time entered for the contract has been resolved

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click **Delete**.
3. Click **OK** to confirm.

About copying contracts

You can create a new contract by copying an existing contract. You can decide which information you want to keep the same and which you want to change, with some limitations.

The following information is automatically copied to the target contract:

- The billing office, remit-to address and expense GL account
- The **Date to use for tax calculation** setting from the **Billing information** tab.

Copying a contract

1. Access the contract.
2. Click > **Copy**.

   The **Copy Contract** dialog box appears.

3. In the **New information** tab, make the necessary changes. For more information, see "Create/Edit Contract dialog, General tab options" on page 9.
4. By default, the new contract is associated with the source contract. To remove this association, clear the **Associate this contract with the original contract** check box.

5. Click the **Additional information to copy** tab.
6. To prevent information from being copied to the target contract, clear the corresponding check boxes. For more information, see "Copy Contract dialog, Additional information to copy options" on page 16.
7. Click **Save**.

   After the information is copied, you can edit the new contract and make any required changes. For example, you can identify which users have access to the contract, or activate revenue recognition.

Copy Contract dialog, Additional information to copy options

Option	Copies information from
Select all/Deselect all check box	Selects all or clears all check boxes on the tab.
Contract category check box	When selected, copies information from the field in the **General** tab.
Contract number check box	When selected, copies information from the field in the **Contract** tab.
Contract type check box	When selected, copies information from the field in the **Contract** tab.
Approved amount check box	When selected, copies information from the field in the **Contract** tab.
Two-level approval information check box	When selected, copies information from the field in the **Approvals** tab.
Allow project managers to specify the time approver check box	When selected, copies information from the field in the **Approvals** tab.
Prevent tax changes on Invoices check box	When selected, copies information from the field in the **Billing information** tab.

Option	Copies information from
Contract access check box	When selected, copies information from the **Access** tab.
Request processing rules check box	When selected, copies the request processing rules from the **Request processing rules** tab.
Request SLA information check box	When selected, copies the request SLA information from the **Request SLA** tab.
Projected resources information check box	When selected, copies the projected resources information from the **Projected resources** tab.
Start date for projected resources field	Sets the earliest start date of resources in the projected resources. The start and end dates for the remaining resources are determined based on this date. For more information, see "About copying date-based information for contracts" on page 18.
Billing rate information check box	When selected, copies information from the **Billing rates** tab. Rates are copied for active billing roles or resources only.
Override billing office check box	When selected, copies the billing offices that are selected for billing rates on the **Billing rates** tab and are different from the contract's billing office. Otherwise, only the billing offices from the contract are copied. Either **Billing rate information** or **Projected resources information** must be selected for this option to be available.
Fixed-fee schedule information check box	When selected, copies the fixed fee schedule information from the **Fixed-fee schedule** tab.
Start date for fixed fee schedule field	Sets the earliest start date of fixed fee items. The dates of the remaining items are determined relative to this date.

Option	Copies information from
Fixed-fee schedule items check box	When selected, copies the schedule items for fixed fee deliverables.
Product information check box	When selected, copies the product Information from the **Products** tab.
Start date for products field	Sets the earliest start date of products. The dates of the remaining items are determined based on this date.
Configurable fields information of the contract check box	When selected, copies the configurable code and text field values. If the fields are mandatory, then this check box cannot be cleared.

About copying date-based information for contracts

When date-based information is copied for a contract, the earliest dated item on the source is copied to the target with the date that is specified on the **Additional information to copy** tab. The start dates for the remaining items are determined based on the relative period of time between their dates and the earliest dated item on the source. The end dates for target items are determined based on the relative period of time between the start and end dates for the source items.

For example, for projected resources, the resource on the source contract that has the earliest start date will be scheduled to start on the target contract on the date selected in the **Start date for projected resources** field. The start dates for the remaining resources on the target contract are determined based on the relative period of time between the start date of the first resource and the start date of the remaining resources on the source contract. The end dates for all resources are calculated by adding the scheduled days to the start dates.

Contract troubleshooting

You cannot change a billing rate or enter a discount for a billing rate

The option to prevent resources from changing billing rates has been enabled on the billing office for the contract.

A customer is not available when you are creating a contract

If access controls have been set for billing offices, then only the customers associated with billing offices to which you have access, and customers that do not have a billing office, are available when you are creating a contract.

If access to the customer is restricted to a selected list of resources, and you are not in the list, the customer is not available for selection when you are creating a contract.

You cannot change the options related to resource requests and task restrictions

Once an open task has been created for a contract, then the following options related to resource requests and restrictions can no longer be changed on the contract:

- **Enable resource requests at project level** check box
- **Enable resource requests at task level** check box
- **Override task restriction** check box

You cannot create open tasks

Before you can create open tasks for a contract, the **Override task restriction** check box on the **Projected resources** tab must be selected.

2. Contract Billing Information

Entering billing information for contracts

You can specify the invoice format, type, billing address, and whether invoices are split with another customer.

1. Access the contract for editing

   The **Edit Contract** dialog box appears.

2. Click the **Billing information** tab.

3. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Billing information tab options" on page 21.

4. To set up email recipients for batch invoicing, see "Setting up email recipients for batch invoicing" on page 26.

5. Click **Save**.

Create/Edit Contract dialog, Billing information tab options

Option	Description
Currency list	Currency to be used for invoices. By default, this is the currency specified for the billing office that is associated with the contract
Billable check box	When selected, invoices can be created for the contract.
Allow project managers to override the [Billable] status check box	When selected, project managers can change the billable setting for their projects under the contract. This option is available only if the **Billable** check box is selected.
Enable batch invoicing check box	When selected, batch invoicing is allowed for the contract. This option is available only if the **Billable** check box is selected.
Split billing check box	When selected, indicates that billing amounts will be split among multiple customers. This option is available only if the **Billable** check box is selected.

Option	Description
Billing type list	Specifies the billing type, which determines how invoices are calculated. For more information, see "About billing types for contracts" on page 27.
Use daily conversion rates from the billing office check box	Available only when the daily or mixed fixed fee/daily billing type is selected. When selected, the daily conversion rates from the billing office are used to convert hours to days for invoicing. When cleared, the daily conversion factor of the resource is used. **Note:** The setting can be changed only either before an invoice or credit note has been created for the contract, or after all invoices and credit notes for the contract have been committed.
Group time entries by project and resource check box	When selected, the daily conversion rate applies to the total time entries with the same billing rate grouped by project and date for each resource.
Force fixed fee selection check box	When selected, resources must specify a fixed fee when creating tasks for projects under the contract, and when creating a fixed fee request processing rule for the contract. Available only when the fixed fee, mixed fixed fee/daily, or mixed fixed fee/hourly billing type is selected. If your organization uses the **Effort expended** method for revenue recognition, the **Force fixed fee selection** check box must be selected so that billable time on tasks can be linked to fixed-fee deliverables.
Expense billing list	Specifies the portion of the expenses for the contract that will be billed to the customer. Options include: • **All expenses** • **No expenses** • **Percentage of expenses**

Option	Description
Expense billing (%) field	Percentage of expenses that will be billed to customers. This field is editable only if **Percentage of expenses** is selected in the **Expense billing** list.
Maximum per invoice field	Maximum amount, in the currency of the contract and excluding taxes, for each invoice.
Enforce check box	When selected, prevents an invoice that exceeds the maximum amount from being submitted for approval. When cleared, a warning message is displayed only. The maximum amount must be specified in the **Maximum per invoice** field.
Purchase order number table/row items	Purchase orders for the contract. For more information, see "Adding a purchase order to a contract" on page 28.
Default check box	When selected, indicates the default purchase order number for the contract.
Payment terms list	Specifies the payment terms for invoices. The default payment term comes from the billing office.
Invoice format list	Specifies the format for invoice. The default format comes from the billing office.
Preferred language list	Specifies the language to be used in invoices. Resources can change the language as required when creating, viewing, saving as PDF, or sending invoices by email.
Invoicing instructions field	Instructions for the resource who creates and prints the invoice. These instructions apear in the **Invoice** dialog box.
Default invoice description field	Description that appears on all invoices.

Email Recipients for Batch Invoicing section

For more information, see "Setting up email recipients for batch invoicing" on page 26.

Billing Rate Information section

Option	Description
Default billing role for tasks field	Default billing role for all resources assigned to projects and tasks of the contract. The project manager can override this default value and assign a specific billing role to each resource when creating task assignments.
Cost center type-ahead field	Cost center whose burden rates you want to use with billing rates for this contract.
Include overtime (%) check box and field	When selected, the percentage rate specified in the field applies to the standard billing rate for overtime. For example, if the standard billing rate is 80, and the overtime rate is 120, you would enter 150 because 120 is 150% of 80. Available only for hourly billing types.
Auto-update billing rates check box	When selected, the billing rates are automatically updated whenever the billing rates are changed in ChangePoint Administration.
Auto-update cost rates check box	When selected, the cost rates are automatically updated on the contract in the following cases: • when the cost rates are changed on the billing office • when the option on the billing office is switched from using billing office cost rates to resource cost rates or vice versa

Address Information section

Option	Description
Remit-to address field	Address to which customers send remittances for invoices. To view the full address, point to the **Remit-to address** field.
Billing Address field	Address to which the invoice is sent.

Option	Description
Customer address option **Main contact address** option	Specifies whether the invoice is sent to the customer address or the main contact address.
Include contact name on the invoice check box	When selected, the main contact's name is displayed on invoices for the contract.
Allow project managers to specify the billing contact check box	When selected, project managers can change the billing contact for their projects under the contract.
Prevent tax changes on invoice check box	When selected, prevents changes to tax amounts on invoices.
Date to use for tax calculation options	Date to use for tax schedules and tax rates for invoices: • Invoice date – date of the invoice • Record date – date of the individual items on the invoice, for example, the date of the expense item
Method of tax calculation options	Method to use for tax schedules and tax rates for invoices: • Calculate tax on each item separately – the tax amount is calculated separately for each invoice item. • Calculate tax on total amount of items – the tax amount is calculated on the total amount for all invoice items. All items must have the same tax schedule. Depending on the selected method for tax calculation, the total may differ and an adjustment is created to balance the sum of the invoice items and the calculated amount.

Bill-to Location section

Option	Description
Work location group list	Work location group of the customer to be billed.
Work location list	Work location of the customer to be billed.

Invoice Distribution GL Accounts section

Option	Description
Project time list	GL accounts to which invoice amounts for project time will be distributed.
Request time list	GL accounts to which invoice amounts for request time will be distributed.
Expenses list	GL accounts to which invoice amounts for expenses will be distributed.
Products from requests list	GL accounts to which invoice amounts for products that are associated with requests will be distributed.
Additional items list	GL accounts to which invoice amounts for additional items will be distributed.

Setting up email recipients for batch invoicing

You can set up a list of recipients for the invoices that are created for a contract during the batch invoicing process. You can enter email addresses manually or search for the email addresses of resources and contacts. When defining the email, the subject is required.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing information** tab.

3. To search for recipients:

   a. In the **Email Recipients for Batch Invoicing** section, do one of the following:

      - To search for contacts in the customer of the contract, select **<Customer name > contacts**.
      - To search for recipients in the list of all contacts, select **All contacts**.
      - To search for recipients among resources in your organization, select **Resources**.

   b. In the **Recipients** field, do one of the following:

      - To view the entire list, click in the type-ahead field and then press **Enter**.

- To filter the list, enter a few characters of the recipient's name in the type-ahead field and then press **Enter**.

c. In the list, select one or more recipients and then press **Enter**.

d. To add the recipients to the email, click the **To** or **Cc** fields.

4. To enter recipients manually, enter the email addresses separated by semicolons in the **To** or **Cc** fields.
5. In the **Subject** field, enter the subject of the email.
6. In the **Comments** field, enter your comments.
7. Click **Apply**.

About billing types for contracts

The selected billing type affects the options that are available for revenue recognition and for request processing rules. Changing the billing type after saving the contract can affect certain settings. For example, changing from **Mixed - Fixed Fee/Hourly** to **Hourly** deletes any fixed fees that have been saved.

The following billing types are available:

Billing type	Description
Daily	Time and rate calculations are based on the number of days for the contract (originally entered as hours and converted to daily fractions as set up in the billing office.
Hourly	Time and rate calculations are based on the number of hours entered for the contract.
Fixed Fee	Customer will be billed a set amount for a deliverable or milestone.
Mixed - Fixed Fee/Daily	Combination of daily and fixed fee billing types.
Mixed - Fixed Fee/Hourly	Combination of hourly and fixed fee billing types.

Note: When you specify a fixed-fee option, the **Fixed-fee schedule** tab is available in the **Contract** dialog box and the **Force fixed-fee selection** check box is available in the **Billing information** tab.

About applying daily conversion rates

Contracts with the billing type **Mixed - Fixed Fee/Daily** or **Daily** use daily conversion rates from the billing office to convert hours to days for invoicing. For these contracts, the daily conversion rate from the billing office is applied by default to time entries grouped by project, task, resource, and date.

However, you can set up a contract so that time entries are grouped by project and date for each resource. To be grouped by project and date, the time entries must have the same billing rate.

About invoice formats for contracts

The **Tax on sum - General** and the **Tax on sum - French general** formats are available only when the **Calculate tax on total amount of items** option is selected as the method of tax calculation in the contract.

Invoice formats and Client Portal

If you use one of the standard ChangePoint invoice formats, then when the invoice is approved, an HTML snapshot of the invoice is automatically saved. This HTML snapshot is displayed when users view the invoice in Client Portal. If you use a custom invoice format, then invoices are displayed in the **General invoice** format only.

About billing addresses for contracts

For the billing address of the contract, you can use the main, billing or shipping address of either the customer or customer contact.

Because the different customer and contact addresses can be set up with different work location groups and work locations, changing the billing address can change the work location groups and work locations for the contract, which can affect taxation.

Adding a purchase order to a contract

You can add one or more purchase orders to a contract. You must specify one of the purchase orders as the default purchase order. The default purchase order number appears by default on

the invoices for the contract, but can be changed to a different purchase order number for the same contract.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing information** tab.

3. In the **Purchase order number** table, click **Add new**.

4. Type the purchase order number into the new row.

5. To specify the purchase order number as the default one for the contract, select the **Default** check box.

6. Click **Save**.

About billing rates for contracts

You can set up billing rates on a contract based on any of the following:

- resources only
- billing roles only
- sets of resources and billing roles

However, as a best practice, it is recommended that you set up billing rates consistently throughout your organization to avoid any confusion.

Billing role-based rates are applied to a resource based on the billing role for the tasks that the resource is assigned during the contract. Each billing role also has a standard billing rate and each resource has a standard billing rate. Each resource can be assigned to more than one billing role during a contract

The billing rates from the contract take precedence over the resource's standard billing rate except where a task is assigned to a resource with no billing role specified, and billing rates have been set up on the contract for billing roles only. In this case, the billing rates from the resource profiles are used.

Only the billing roles levels that have been set up with billing rates are available in task assignments.

Tip: To show your customers the hours that resources have worked on their projects, but for which they are not being billed, enter a billing rate of zero. The zero rate displays as

the billing rate in the **Billing rates** tab of the contract and is used on invoices instead of the standard rate.

Copying or updating billing rates from the billing office

When you copy or update billing rates from the billing office, you are prompted for an effective date. The billing rates for the billing office that are in effect for the effective date that you specify are copied to the contract. When you copy the billing rates the first time, the effective dates in the history will be the effective dates from the billing office. Each time you subsequently update the billing rates, the effective dates in the history will be the effective dates that you specify during the update.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing rates** tab.

3. Click the **Copy Standard Rates** button.

   The **Select Effective Date** dialog box appears.

4. Enter the effective date for the billing rates.

5. In the **Discount** field, specify the discount percent, if applicable, that applies to the billing rates.

6. In the **Comments** field, enter comments about the billing rates.

7. Click **OK**.

   The billing rates are added to the billing rate table.

8. Click **Save**.

Setting up a billing rate for a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing rates** tab.

3. Right-click in the table and then select **Insert**.

   A row is added to the table.

4. To add a billing rate from a different billing office, select the billing office in the **Billing office** field.
5. Do one or both of the following:
   - In the **Billing role** list, select the billing role.
   - In the **Resource** list, select the resource.

   Tip: To add resources to the **Resource** list, and optionally to your preferred resources, right-click and then select **Manage Resources**.
6. Specify the billing rate by doing one of the following:
   - To specify the billing rate, enter the rate in the **Billing rate** field. The discount percent is calculated automatically.
   - To apply a discount to the standard rate, enter the discount percent in the **Discount (%)** field. The billing rate is calculated automatically.
   - To apply a markup to the standard rate, enter the negative percent in the **Discount (%)**. The billing rate is calculated automatically.
7. Complete the remaining fields as required. For more information, see "Create/Edit Contract dialog, Billing rates tab options" on page 31.
8. Click **Save**.

Create/Edit Contract dialog, Billing rates tab options

Option	Description
Billing office type-ahead field	Billing office for the contract.
Billing role type-ahead field	Billing role for the billing rate.
Resource list	Resource for the billing rate.

Option	Description
Standard rate field	Billing rate before any discount or markup, as follows: • if only a billing role is specified in this dialog, then the billing role rate is displayed • if only a resource is specified, then the resource rate is displayed • if both a billing role and resource are specified, then the resource rate is displayed
Discount (%) field	Percentage to apply to the standard rate to determine the discounted billing rate. To apply a discount of 20%, enter: 20. To apply a markup of 20%, enter: -20.
Billing rate field	Standard rate * (100-discount percentage)/100. If you enter a billing rate manually, then the discount percentage is automatically calculated based on the standard rate.
Billing currency list	Currency of the billing rate. If this currency is different than the contract currency, the billing rate is converted to the contract currency when work is billed to the customer.
Billing role cost rate field	Cost rate for the resource or billing role rate, depending on whether the contract uses a resource-based or billing role-based billing office.
Billing role OT hourly cost rate field	Overtime cost rate for the resource or billing role rate, depending on whether the contract uses a resource-based or billing role-based billing office.
Cost currency list	Currency of the cost rate.
Request time only check box	When selected, the billing role is used only for billing time associated with requests. This billing role is not available for selection when assigning tasks.

About burden rates used in billing rates

The burden rate for a resource comes from the resource's profile. If a burden rate is not specified on the resource profile, then the burden rate of the workgroup or global workgroup is used.

For billing roles or for resources that do not have burden rates specified on their profile, workgroup or the global workgroup, the burden rate comes from the cost center that is specified for the contract on the **Billing information** tab.

Editing billing rates

You cannot edit billing rates. Instead, you must replace the billing rate with a new rate that has a different effective date. If you make a rate inactive, you must make sure that there is another rate that is currently active. For a given effective date, only one rate can be active at a time.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing rates** tab.

3. Click the row of the billing rate that you want to change.

   The **Billing Rate History** table appears.

4. Right-click in the table and then select **Insert**.

   A new row is added to the table. The new row includes the currently effective billing rate information, and shows the current date as the effective date.

5. Make the necessary changes to the new row. For more information, see "Create/Edit Contract dialog, Billing rates tab options" on page 31.

6. In the **Effective Date** field, enter the date when the changes become effective.

7. To make the billing rate inactive, clear the **Active** check box.

8. In the **Comments** field, enter comments about the rate change.

9. Click **Save**.

Deleting a billing rate

You cannot delete a billing rate that is used on a task.

1. Access the contract for editing.

The **Edit Contract** dialog box appears.

2. Click the **Billing rates** tab.
3. Click the row of the billing rate that you want to delete.
4. Right-click in the table, and then select **Delete**.
5. Click **OK** to confirm.
6. Click **Save**.

About setting up split billing

For a contract, you can set up billing amounts to be split between two or more customers, provided that either no invoices have been created, or all existing invoices have been committed.

You can set up split billing at the following levels:

- On the contract – split billing rules apply to all time, fixed fees, expenses, products, and request time for the contract. These rules are overridden by rules set at a lower level.
- On specific products and fixed fees on the contract – split billing rules apply to specific products or fixed fees defined in the contract.
- On fixed-fee schedule items – split billing rules apply to fixed fee schedule items defined for a fixed fee schedule in the contract.
- On projects for the contract – split billing rules apply specifically to time and expenses entered for the project.

About setting up split billing on a contract

You first enable split billing on the contract, which becomes the primary contract, and then specify the customers and the percentage to be invoiced to each customer. When you save the settings, a split billing contract is created under each customer. Split billing contracts have the same name as the primary contract and are for billing purposes only.

After you set up split billing, all editing must be done in the primary contract. All time, fixed fees, expenses, products, and request time are applied to the primary contract and then invoiced to each customer according to the split percentage or amount that was specified.

Split billing contracts are not included in the following reports:

- Budget reports

- **Contract Financial Analysis** report
- **Work in Progress** report
- **Revenue Reconciliation** report

Setting up split billing on a contract

You select customers and specify the percentage that each customer will be invoiced. You can either specify the percentage manually as you select each customer, or select all of the customers first and then select the option to automatically divide the percentage evenly between the customers.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Billing information** tab.
3. Select the **Split billing** check box, and then click **Apply**.

   The **Split billing** tab appears.

4. Click the **Split billing** tab.
5. Right-click in the table and then select **Insert**.

   An empty row is added to the table.

6. In the **Customer** type-ahead field, select the customer that will be added in the split billing.
7. In the **Percentage** field, enter the percentage that the customer is to be billed.
8. In the **Main Contact** field, select the contact for the customer.
9. Add additional customers as required.
10. Click **Save**.

To divide the billing evenly between all the customers

When you divide the billing evenly between all customers, the same percentage is applied to all customers listed for the contract, including the customers that were added to the list when split billing rules were set up at the product or fixed fee level.

1. Right-click in the table and select **Auto-split all**.

2. Click **Save**.

To divide the billing evenly between selected customers

When you divide the billing between selected customers, the percentage is changed to 0 for all customers that are not selected.

1. Select the rows of the required customers.

   Note: Use the **Shift** and **Ctrl** keys according to the standard Windows conventions to select customers.

2. Right-click in the table and select **Auto-split selected**.
3. Click **Save**.

Editing split billing for a contract

Once invoices have been created for a contract, you cannot change the split billing settings until all invoices for the primary and split billing contracts are in **Archived** or **Credited** status, or have been discarded or deleted.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Split billing** tab.
3. Make the necessary changes.
4. To delete one or more rows, select the rows, right-click and then select **Delete**.
5. Click **Save**.

Setting up split billing for a product or a fixed fee

You can split the billing between two or more customers by percentage or by amount.

You can automatically add the customers that have already been defined at the contract level, and you can specify new customers. Customers added at the product or fixed fee level are also added to the split billing list at the contract level, but the split percentage displays 0.

1. Access the contract for editing.
2. Click the **Products** or the **Fixed fees** tab.
3. Right-click the table and select **Insert**.

4. Complete the fields as required.
5. Select the **Show split billing** check box, and then click outside the cell in the row.

   The **Split billing** section appears.
6. Select the split billing option:
   - To split billing by percentage, select **Split by percentage**.
   - To split billing by amount, select **Split by value**.
7. To specify a customer, right-click in the table and select **Insert**, and then select the customer in the **Customer** type-ahead field.
8. To add the customers that have already been defined at the contract level, right-click in the table and select **Load contract split billing**.
9. To specify the percentage or amount for each customer, do one of the following:
   - To specify the percentage or amount manually, enter the value in the **Percentage** or **Amount** field.
   - To split the billing evenly between all customers, right-click in the table and select **Auto-split**.
10. Click **Apply**.

Editing split billing for a product or a fixed fee

Once invoices have been created for a product or a fixed fee, you cannot change the split billing settings until all invoices are in **Archived** or **Credited** status, or have been discarded or deleted.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.
2. Click the **Products** or the **Fixed fees** tab.
3. In the product or the fixed fee row, select **Show split billing**.

   The **Split billing** table appears.
4. Make the necessary changes.
5. To delete one or more rows, select the rows, right-click and then select **Delete**.

6. Click **Save**.

About scheduling fixed fees for the contract

You can create a fixed-fee schedule only for contracts that use a fixed fee or mixed billing type. A fixed-fee schedule is a series of fixed invoices for a contract. You create a fixed fee schedule with fixed-fee schedule items to schedule the billing for fixed-fee deliverables.

For example, a customer agrees to a fixed fee contract worth $15,000, which is to be invoiced $5,000 on the last day of each month for the next three months. You would first create a fixed-fee schedule for the $15,000 deliverable, and then create three fixed-fee schedule items, each with the billing amount of $5,000.

You cannot create fixed fee schedule items for deliverables that have parent deliverables or committed recognized revenue, or that have been invoiced.

Creating a fixed-fee schedule

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. Right-click in the table and then select **Insert**.

   A new row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Fixed-fee schedule tab options" on page 38.

5. Click **Save**.

6. Add the fixed-fee schedule items. For more information, see "Adding recurring fixed-fee schedule items" on page 41 and "Adding a fixed-fee schedule item manually" on page 45.

Create/Edit Contract dialog, Fixed-fee schedule tab options

The options listed here apply both to fixed-fee schedules and fixed-fee schedule items.

Option	Description
Billing date field	Date that the fixed-fee deliverable is billed.
Billing amount field	Amount that will be billed.
Deliverable field	Name of the deliverable, which displays on the invoice.
Parent deliverable field	Parent deliverable that is associated with the new deliverable, if applicable. If a parent deliverable is selected, schedule items cannot be created for this fixed deliverable. Parent fixed fee schedules or schedule items are not available for selection as a parent deliverable.
Do not invoice check box	When selected, indicates that the fixed-fee schedule items will be invoiced instead of the fixed-fee deliverable. **Note:** If the **Do not invoice** check box is selected for the fixed-fee deliverable, you can still recognize revenue against the fixed-fee deliverable and associate tasks and cost with the deliverable.
Invoice only when tasks are completed check box	When selected, if the fixed fee is associated with a task, the fixed fee or the fixed-fee item can only be invoiced when all associated tasks have been marked as completed.
Invoice distribution GL account check box	GL account to which invoice amounts for fixed fees will be distributed.
Billed check box	When selected, indicates whether the deliverable has been billed.
Fixed fee ID field	Optional field if your organization is using a custom interface or custom reports.
Work location and **Work location group** fields	Work location and work location group, which determine how the item is taxed, and can also be used for reporting purposes.
Work code category field	Work code category

Option	Description
Work code field	Work code
Prepaid check box	Optional field if your organization is using a custom interface or custom reports.
Capital check box	When selected, designates the item as a capital cost
Allow selection on tasks check box	When selected, the fixed-fee deliverable can be selected on tasks.
Show schedules check box	When selected, the schedule items table is displayed.
Revenue recognized check box	When selected, indicates that revenue has been recognized for the fixed fee.
Revenue adjustment field	Total amount of adjustments made to the revenue that was recognized for the deliverable.
Revenue recognition method option	Revenue recognition method.
Physical percent complete field	Value for the physical percent complete, if the revenue recognition method is selected.
Credit GL account list	Credit account for the deliverable.
Debit GL account list	Debit account for the deliverable.
Show split billing check box	When selected,split billing rules can be set up for fixed-fee schedules. **Note:** This check box displays only if split billing is enabled for the contract.

Editing a fixed-fee schedule

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. Make the necessary changes. For more information, see "Create/Edit Contract dialog, Fixed-fee schedule tab options" on page 38.
4. Click **Save**.

Deleting a fixed-fee schedule

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.
2. Click the **Fixed-fee schedule** tab.
3. Select the row of the fixed fee schedule.
4. Right-click and select **Delete**.

   The fixed fee schedule is removed from the table.
5. Click **Save**.

Adding recurring fixed-fee schedule items

You can add a set of fixed-fee schedule items that recur weekly or monthly. You can specify the number of schedule items and the amount to be billed per schedule item.

1. Do one of the following:
   - Create a fixed-fee schedule.
   - Access a fixed-fee schedule for editing.
2. Select the **Show schedules** check box of the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. Click **Auto-add schedule items**.

   The **Auto-Add Schedule Items** dialog box appears.
4. In the **Start billing date** field, enter the start date for the schedule items.
5. To set up the schedule items to be billed weekly or every *x* weeks:
   a. In the **Billing frequency** field, select **Weekly**.
   b. In the **Recurrence Setting** section, enter the value to specify the frequency in weeks.

6. To set up the schedule items to be billed monthly, or every *x* months, on the same day of the month as the Start billing date:
   a. In the **Billing frequency** field, select **Monthly**.
   b. In the **Recurrence Setting** section, select the **Every [ ] months** option
   c. Enter the value to specify the frequency in months.
7. To set up the schedule items to be billed monthly, or every *x* months, on the first or last day of each month:
   a. In the **Billing frequency** field, select **Monthly**.
   b. In the **Recurrence Setting** section, select the **Every [First] day of every [ ] months** option
   c. If required, change **First** to **Last**.
   d. Enter the value to specify the frequency in months.
8. In the **Number of schedule items** field, enter the total number of schedule items.

   The billing amount for each schedule item that appears in the **Amount per schedule item** field is calculated by dividing the billing amount by the number of schedule items.
9. Complete the remaining fields as required. For more information, see "Create/Edit Contract dialog, Fixed-fee schedule tab options" on page 38.
10. If the **Split Billing** section displays, you can set up split billing rules for the fixed-fee schedule items. For more information, see "Setting up split billing for recurring fixed-fee schedule items" on page 44.
11. Click **Save**.

Auto-Add Schedule Items (Fixed Fee) dialog box options

Option	Description
Start billing date field	Date when the first fixed-fee schedule item is billed.
Billing frequency option	Frequency of the schedule items (Monthly or Weekly).

Option	Description
Recurrence Settings section	Options for setting up the recurrence of the schedule items. Options depend on the frequency of the schedule items.
Every [ ] weeks option	Frequency of weekly schedule items, for example, every [2] weeks.
Every [ ] months option	Frequency of monthly schedule items, for example, every [3] months, starting from date in the Start date field.
The [first or last] day of every [ ] months field	Frequency of monthly schedule items, for example, the [first] day of every [3] months.
Number of schedule items field	Total number of schedule items that will be automatically created.
Amount per schedule item field	Amount per schedule item.
Multiplier percentage field	Percentage by which the fixed-fee amounts increase. The increase amounts are compounded. For example: If you set up 12 monthly fixed-fee items with a multiplier of 10% and the first schedule item is US$1,000, the second schedule item will be US$1,100, the third schedule item will be US$1,210, the fourth schedule item will be US$1,331, and so on.
Allow selection on tasks check box	When selected, the fixed-fee deliverable can be selected on tasks.
Do not invoice check box	When selected, invoicing will be done for the fixed-fee deliverable instead of the fixed-fee schedule item.
Invoice only when tasks are completed check box	When selected, the fixed-fee schedule item can only be invoiced when its associated task (if any) has been marked as completed.

Option	Description
Invoice distribution GL account field	GL accounts to which invoice amounts for fixed fees will be distributed.
Prepaid check box	When selected, the fixed fee item has been prepaid.
Capital field	When selected, designates the item as a capital cost.
Work location group field **Work location** field	Work location group and work location, which determine how the item is taxed, and can also be used for reporting purposes.
Work code category field	Work code category.
Work code field	Work code.

Setting up split billing for recurring fixed-fee schedule items

1. Access a fixed-fee schedule.
2. Select the **Show schedules** check box of the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. Click **Auto-add schedule items**.

   The **Auto-Add Schedule Items** dialog box appears.
4. Add fixed-fee schedule items. For more information, see "Adding recurring fixed-fee schedule items" on page 41.
5. Select the **Show split billing** check box of a fixed-fee schedule item, and then click outside the cell.

   The **Split Billing** section appears.
6. Select the split billing option:
   - To split billing by percentage, select **Split by percentage**.
   - To split billing by amount, select **Split by amount**.
7. To add a customer, right-click in the table and select **Insert**, and then select the customer in the **Customer** type-ahead field.

8. To add split billing customers from the contract, right-click in the table and select **Load contract split billing**.
9. To specify the percentage or amount for each customer, do one of the following:
   - To specify the percentage or amount manually, enter the value in the **Percentage** or **Amount** field.
   - To split the billing evenly between all customers, right-click in the table and select **Auto-split**.
10. Click **Save**.

Editing split billing for recurring fixed-fee schedule items

Once invoices have been created for a contract, you cannot change the split billing settings until all invoices for the primary and split billing contracts are in **Archived** or **Credited** status, or have been discarded or deleted.

1. Access the fixed-fee schedule.
2. Click the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. In the row of the fixed-fee schedule item, select the **Show split billing** check box, and then click outside the cell.

   The **Split billing** section appears.
4. Make the necessary changes.
5. To delete one or more rows, select the rows, right-click and then select **Delete**.
6. Click **Save**.

Adding a fixed-fee schedule item manually

1. Do one of the following:
   - Create a fixed-fee schedule.
   - Access a fixed-fee schedule for editing.
2. Select the **Show schedules** check box of the fixed-fee schedule row.

   The fixed-fee schedule items table appears.

3. Right-click in table and then select **Insert**.

   A new row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Fixed-fee schedule tab options" on page 38.

5. Click **Save**.

Editing a fixed-fee schedule item

If the parent deliverable has been invoiced, you cannot change the billing amount of the schedule items. If revenue has been recognized for the parent deliverable, changes to the billing amount must not affect the total amount and must balance with the milestones.

If a revenue recognition method has been selected for the parent fixed fee deliverable, the revenue recognition fields do not display in the schedule item table.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. Click the fixed-fee schedule row.

   The fixed-fee schedule items table appears.

4. Make the necessary changes. For more information, see "Adding a fixed-fee schedule item manually" on page 45.

5. Click **Save**.

Deleting a fixed-fee schedule item

You cannot delete a fixed-fee schedule item if one or more of the following conditions apply:

- revenue has been recognized for the item
- the item is associated with a task
- the item is associated with a request processing rule
- the item has been invoiced

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Fixed-fee schedule** tab.
3. Click the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
4. Select the fixed-fee schedule item that you want to delete.
5. Right-click and select **Delete**.

   The fixed-fee schedule item is removed from the table.
6. Click **Save**.

About adding a product to a contract

You can set up products such as hardware, applications or systems that are required for the contract, including the billing information and revenue recognition information for these items.

You can set up a set of recurring schedule items for products to a contract.

About creating products for which the quantity will be specified during invoicing

To create a product for which the quantity will be specified during invoicing (for example, a managed service activity), you must specify the quantity as 0 when adding the product to the contract.

When the product is invoiced, the quantity on the contract is updated accordingly. This functionality is not supported on split billing contracts or when the contract has a revenue recognition method of **Amount recognized** or **Percent of total deliverable**.

About scheduling product costs

You can use milestones to create a schedule of product costs to track the cost of maintenance or subscription service products for a contact.

You create the product costs schedule for milestones by completing the cost amount, and cost credit and debit GL account fields. These fields are available when revenue recognition is enabled for the contact. The cost data can then be gathered in reports.

Adding a product to a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Product schedule** tab.
3. Right-click in the table and select **Insert**.

   An empty row is added to the table.
4. Complete the fields as required. For more information, see "Create/Edit Contract Product schedule dialog, tab options" on page 48.
5. If the revenue recognition fields are available, you can set up revenue recognition for the product. For more information, see "Setting up revenue recognition for a product" on page 57.
6. To add schedule items for the product, see "Adding recurring product schedule items to a contract" on page 51.
7. Click **Save**.

Create/Edit Contract Product schedule dialog, tab options

Field	Description
Allow selection on task check box	When selected, the product is available to be associated with a task and invoiced based on the status of the task.
Available for billing list	Specifies when a product that is associated with a task can be invoiced. Options are: • **On completion of task** – the product becomes available for invoicing when all tasks that are associated with the product are completed. • **On ready to invoice on task** – the product is available for invoicing when the **Contract product ready to invoice** check box is selected on the task.
Billing date field	Date the product will be invoiced.
Capital check box	When selected, designates the item as a capital cost.
Cost credit GL account list	GL account for credits for the product costs.
Cost debit GL account list	GL account for debits for the product costs.

Field	Description
Credit GL account list	Credit GL account for the product
Debit GL account list	Debit GL account for the product
Description field	Description of the product
Do not invoice check box	When selected, the product is not invoiced.
Invoice distribution GL account check box	GL account to which the invoice amounts for products will be distributed.
Invoiced check box	Automatically selected if the product has already been invoiced.
Negotiated cost field	Cost that has been negotiated for the contract
Negotiated price field	Price that has been negotiated for the contract
Parent product field	Parent product, if applicable
Physical percent complete field	Percentage that the product is complete. Available only if **Physical percent complete** is selected as the revenue recognition method. If you do not want to specify a value, enter zero (0). You can update this percentage in the pre-run report during the revenue recognition process.
Product field	Product
Project field	Project associated with the product.
Quantity field	Units of the product to be delivered to the customer. **Note:** If the quantity is to be specified during invoicing, enter 0.
Resource field	Resource for which the product costs that do not get expensed can be tracked by using custom reports.
Revenue adjustment field	Total amount of adjustments made to the revenue recognized for the product

Field	Description
Revenue recognition method field	Revenue recognition method to apply to the product. Options are: • **Amount recognized** • **Percent of total deliverable** • **Physical percent complete**
Revenue recognized check box	Automatically selected if revenue has already been recognized and committed for the product
Standard cost currency field	If the currency for the product is different from the currency specified in the contract, the currency of the contract is used for billing.
Standard cost field	Standard cost of the product.
Standard price field	Standard price per unit of the product.
Total cost field	Total cost.
Total price field	Total price amount for the contract
Work location group list **Work location** list	Location where the product is being shipped. The location determines how the item is taxed, and is used for reporting purposes.

Editing a product associated with a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Product schedule** tab.

3. To edit a value, click the cell and then select a new value. For more information, see "Create/Edit Contract Product schedule dialog, tab options" on page 48.

4. Click **Save**.

Deleting a product associated with a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Product schedule** tab.
3. Right-click the product and then click **Delete**.
4. Click **Save**.

Adding recurring product schedule items to a contract

You can add a set of recurring schedule items for products to a contract. When the products are first added, they are identical except for the billing dates. You can then edit them as required.

Note: Adding schedule items for a product after it has been added to a budget can result in incorrect budget data when data in past fiscal periods is replaced with actual data. To ensure budget data is correct, you must remove the product from the budget and add its schedule items instead.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.
2. Click the **Product schedule** tab.
3. Select an existing product or add a new product, and then do the following in the product row:
   a. Select the **Do not invoice** check box.
   b. Make sure no revenue recognition method is selected.
   c. Select the **Show schedules** check box, and then click somewhere outside of the row. The **Product schedules** table appears.
4. Click **Auto-Add Schedule Items**. The **Auto-Add Schedule Items** dialog box appears.
   a. Complete the fields as required. For more information, see "Auto-Add Schedule Items (Product) dialog box options" on page 52.
   b. Click **OK**. The schedule item rows appear in table.
5. Review and edit the schedule items, if required.
6. Click **Save**.

Auto-Add Schedule Items (Product) dialog box options

Option	Description
Description field	Description of the schedule items.
Start billing date field	Date when the first schedule item is to be billed.
Billing frequency option	Frequency of the schedule items (weekly or monthly).
Recurrence Settings section	Options for setting up the recurrence of the schedule items, according to the selected billing frequency.
Every [ ] weeks option	Frequency of weekly schedule items, for example, every [2] weeks.
Every [ ] months option	Frequency of monthly schedule items, for example, every [3] months, starting from date in the **Start date** field.
The [first or last] day of every [ ] months field	Frequency of monthly schedule items, for example, the [first] day of every [3] months.
Number of schedule items field	Number of schedule items to be created.
Quantity per schedule item field	Quantity of product units for each schedule item.
Negotiated price per schedule item field	Price to be charged for each schedule item.
Negotiated cost per schedule item field	Cost that was negotiated for each schedule item.
Allow selection on tasks check box	When selected, the product can be selected on tasks.
Do not invoice check box	When selected, the product schedule items will not be invoiced.

Option	Description
Available for billing list	Available only when the product can be selected on tasks. Specifies when a product that is associated with a task can be invoiced. Options are: • **On completion of task** – the product becomes available for invoicing when all tasks that are associated with the product are completed. • **On ready to invoice on task** – the product is available for invoicing when the **Contract product ready to invoice** check box is selected on the task.
Invoice distribution GL account field	GL accounts to which invoice amounts for product will be distributed.
Capital field	When selected, designates the schedule items as capital costs.
Work location group field **Work location** field	Work location group and work location, which determine how the schedule items are taxed. Can also be used for reporting purposes.
Project field	Project associated with the product.
Resource field	Resource for which the product costs that do not go through the expense reporting process can be tracked through custom reports.
Revenue Recognition options	
Revenue recognition method field	Revenue recognition method to be used. Options are: • **Amount recognized** • **Percent of total deliverable** • **Physical percent complete**
Credit GL account list	Credit GL account for the product.
Debit GL account list	Debit GL account for the product.
Cost credit GL account list	GL account for credits for the product costs.
Cost debit GL account list	GL account for debits for the product costs.

Setting up revenue recognition in a contract

The specific revenue recognition settings are set up for each contract. These settings include the maximum amount of recognizable revenue, labor multiplier, adjustment factor, revenue recognition method, and revenue debit and credit GL accounts. Revenue debit and credit GL accounts can also be set on projects and tasks. You can also specify when to prevent (lock) adjustments to time entries and expenses.

You can further define revenue recognition settings for productsand fixed-fee deliverables for the contract by specifying the settings either for the item itself or its schedule items, but not both.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Revenue** tab.

3. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Revenue tab options" on page 54.

4. Click **Save**.

Create/Edit Contract dialog, Revenue tab options

Field	Description
Enable revenue recognition check box	When selected, revenue recognition is enabled.
Transactions after this date field	Date after which revenue will be recognized for the contract. Use this option to allow resources to enter time without it being considered as potential revenue. For example, your organization may have spent more time preparing a prototype than the amount of time that can be billed to the customer.
Maximum recognizable revenue field	Maximum revenue that can be recognized. Default value is the contract amount specified for the contract.

Field	Description
Maximum recognizable revenue for time and expenses field	Contract amount, less the fixed fee and product amounts. If time and expense maximums are enabled, revenue recognition for time and expenses stops once it reaches the maximum amount. If the field displays zero, the fixed fee and product amounts exceed the contract amount, and no revenue will be recognized for time and expenses.
Labor multiplier field	Percent value to enable revenue recognition for time based on the cost rate rather than the billing rate. The amount is calculated as follows: Resource or billing role cost rate x labor multiplier x revenue recognition adjustment factor
Revenue recognition adjustment factor field	Percent value to reduce the recognized revenue amount to a more conservative amount. The adjustment factor applies to time, expenses, fixed-fee deliverables, products, and milestones.
Cost center type list	Depending on the option selected, during the revenue transfer process, the cost center of the contract manager or billing office is compared to the cost center of the resource who entered the time
Revenue Recognition Option section	
Deliverable or milestone-based check box	When selected, revenue recognition is based on deliverables/milestones.
Time and expense-based options	When selected, revenue recognition is based on the selected option (both time and expenses, time only, or expenses only, or disabled).
Revenue Accounts section	
Revenue credit account for time list	Credit account for revenue realized on billable time. This field is available only if you select a revenue recognition method for time.

Field	Description
Revenue debit account for time list	Debit account for revenue realized on billable time. This field is available only if you select a revenue recognition method for time.
Lock desubmit time check box	When selected, time for the contract cannot be desubmitted. Automatically selected when the tentative revenue recognition is in progress and automatically cleared once the recognized revenue has been committed.
Lock time and expense transfer check box	When selected, time and expenses for the contract cannot be transferred. Automatically selected when the tentative revenue recognition is in progress and automatically cleared once the recognized revenue has been committed.

Setting up revenue recognition for a fixed-fee deliverable

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. In the **Revenue recognition method** field, select the revenue recognition method to apply to the deliverable.

   - If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones.
   - If you select **Physical percent complete** or **Physical percent complete - Cost**, do one of the following:
     - Enter a percent value in the **Physical percent complete** field.
     - Enter zero if you do not want to specify a value yet. This percentage can be updated in the pre-run report during the revenue recognition process.

4. In the **Credit GL account** and **Debit GL account** lists, select the GL accounts for the deliverable.

5. Click **Save**.

Setting up revenue recognition for a fixed-fee schedule item

You can break down the billing amount of a deliverable included in a fixed-fee schedule into smaller amounts, according to a schedule that is specific to the deliverable. You can then set up revenue recognition for these schedule items rather than for the deliverable.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. Click the row of a fixed-fee deliverable for which schedule items have been set up.

   The fixed-fee schedule items table appears.

4. In the **Revenue recognition** method field for the schedule item, select the revenue recognition method:

   - If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones.

   - If you select **Physical percent complete** or **Physical percent complete - Cost**, you can enter a percent value or leave it as zero. The value can be changed later in the pre-run report during the revenue recognition process.

5. Complete the remaining fields as required. For more information, see "Create/Edit Contract dialog, Fixed-fee schedule tab options" on page 38

6. Click **Save**.

Setting up revenue recognition for a product

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Product schedule** tab.

3. In the **Revenue recognition** method field in the product row, select the revenue recognition method:

   - If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones.

- If you select **Physical percent complete**, you can enter a percent value or leave it as zero. The value can be changed later in the pre-run report during the revenue recognition process.

4. Complete the remaining fields as required. For more information, see "Create/Edit Contract Product schedule dialog, tab options" on page 48.
5. Click **Save**.

Setting up revenue recognition for a product schedule item

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Product schedule** tab.
3. Select the product that includes schedule items.
4. The schedule items table appears.
5. In the **Revenue recognition** method field in the schedule item row, select the revenue recognition method:
   - If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones. For more information, see
   - If you select **Physical percent complete**, you can enter a percent value or leave it as zero. The value can be changed later in the pre-run report during the revenue recognition process.
6. Complete the remaining fields as required. For more information, see "Create/Edit Contract Product schedule dialog, tab options" on page 48
7. Click **Save**.

Adding milestones for a product or fixed-fee schedule

If you select a revenue recognition method of **Amount recognized** or **Percent of total deliverable** for a product or fixed-fee schedule, you must set up milestones.

You can either add individual milestones manually or multiple milestones at once. When you add multiple milestones, the billing amount and cost amount are evenly distributed according to the options that you select.

1. Access the contract for editing.

2. Click the **Product schedule** tab or **Fixed-fee schedule** tab.
3. Click the product row or at the fixed-fee schedule row that has either the revenue recognition method of **Amount recognized** or **Percent of total deliverable**.

   The milestones table appears.

To add milestones manually

1. Right-click in the milestones table and select **Insert**.

   A new row is added to the table.
2. In the **Milestone** field, type the name of the milestone.
3. Complete the fields as required. For more information, see "Milestone options for products and fixed-fee schedules" on page 59.
4. Click **Save**.

To add multiple milestones at once

1. Click **Auto-add milestones**. The **Auto-Add Milestones** dialog box appears.
2. In the **Start date** field, enter the start date of the revenue recognition.
3. In the **Number of milestones**, enter the number of milestones to be created.
4. In the **Frequency** field, select **Weekly** or **Monthly**.
5. In the **Credit GL account** field, select a credit account for the revenue.
6. In the **Debit GL account** field, select a debit account for the revenue.
7. In the **Cost credit GL account** field, select a credit account for the costs.
8. In the **Cost debit GL account** field, select a debit account for the costs.
9. Click **Save**.

Milestone options for products and fixed-fee schedules

The fields that appear depend on the revenue recognition method you choose.

Field	Description
Milestone field	Name of the milestone.
Amount field	Portion of the total billing amount of the fixed-fee deliverable or the total price of the product.
Percent field	Percentage of the total billing amount of the fixed-fee deliverable, or the total price of the product, calculated as follows: Total billing amount / Number of milestones
Date field	Date when the revenue recognition for the milestone can start.
Credit GL account list	Credit account for the selected milestone.
Debit GL account list	Debit account for the selected milestone.
Revenue recognized check box	Indicates if revenue has already been recognized and committed for the deliverable or the product.
Revenue adjustment field	Total amount of adjustments made to the revenue recognized for the deliverable or the product.
Cost amount field	Cost amount, which is used for reporting purposes only.
Cost credit GL account list	GL account for credits for the product costs.
Cost debit GL account list	GL account for debits for the product costs.

3. Contract Approvals, Access and Other Details

About specifying approvals for contracts

Time and expense approvals

You can specify time and expense approvers for contracts, which override the default time and expense approvers set up for each resource.

Time and expense approvers review, and either approve or reject, time and expenses that are submitted by resources for the contract. Secondary approvers approve the time and expenses of primary approvers. After time and expenses are approved, they become available for invoicing.

If a time approver is not specified on the contract, time is approved at the project or resource level. In this case, you must set up the contract to allow project managers to specify time approvers for their projects that are under the contract.

You can also specify which expense general ledger (GL) accounts are available to be used for expenses associated with this contract.

Invoice approvals

You can specify that two levels of approvals are required for invoices. You can also specify whether the approvals are required based on invoices being over a certain amount or containing write-offs/ups.

Specifying time and expense approvers for a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Approvals** tab.

3. Complete the fields as required. For more information, see " Create/Edit Contract dialog, Approvals tab options" on page 62.

4. To enable two levels of approvals for invoices:

   a. In the **Invoice Approvals** section, select one of the following check boxes:

      - **Enable two-level approval**
      - **Enable two-level approval on contract overage**
      - **Enable two-level approval for write-offs/ups**

b. In the **Second-level approver** list, select the resource responsible for the second approvals.

5. Click **Save**.

Create/Edit Contract dialog, Approvals tab options

Field	Description
Primary time approver type-ahead field	Resource who approves the time submitted for the contract.
Secondary time approver type-ahead field	Resource who approves the time that the primary time approver submits.
Primary expense approver type-ahead field	Resource who approves the expenses for the contract.
Secondary expense approver type-ahead field	Resource who approves the expenses entered by the primary expense approver.
Allow project managers to specify the time approver check box	When selected, project managers can specify the time approver for their projects under the contract.
Expense approval limit field	When an amount is specified, expenses that are over the amount are sent to the contract expense approver.
Expense GL account list	Resource whose workgroup GL account is to be used for the expenses associated with the contract.
Enable two-level approval check box	When selected, a second level of approval after the contract manager is required for all invoices for the contract.
Enable two-level approval on contract overage check box	When selected, the second-level approval is required only for invoices that exceed the approved amount that is specified in the **Contract** tab.

Field	Description
Enable two-level approval for write-offs/ups check box	When selected, the second-level approval is required only for invoices that contain write-offs/ups.
Second-level approver type-ahead field	Resource who approves invoices after the contract manager approves them.

Managing access to a contract

You can restrict view access to a contract to specific resources. You can also do one of the following:

- You can restrict edit access to specific resources only. The resources must already have edit access to contracts.
- You can grant edit access to specific resources that have access to create contracts. The resources who have edit access can still edit the contract.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Access** tab.

   Note: Only the resources who have view, edit or create access for contracts are available for selection in the **Select Preferred Resources** dialog box.

3. To restrict view access to specific resources:

   a. Select the **Restrict view access to the following resources** check box.

   b. In the **Preferred resources** list, select one or more resources.

   c. Click the up arrow that is above the **Preferred resources** list.

4. To select other resources and optionally add them to your preferred resources list, click the **Manage resources** link.

5. To grant edit access to resources who already have create access to contracts:

   a. Select the **Grant edit access to the following resources that can create contracts** option.

   b. In the **Preferred resources** list, select one or more resources.

   c. Click the down arrow that is below the **Preferred resources** list.

6. To restrict edit access to specific resources who have edit access:

   a. Select the **Restrict edit access to the following resources that can edit contracts** option.

   b. Click the down arrow that is below the **Preferred resources** list.

7. Click **Save**.

About request processing rules

You must set up a request processing rule for a request type before resources can create requests of that request type for the contract. The request processing rule is also where you can set up the request type so that an SLA can be created for it. You can apply the request SLA to invoicing and escalations for the request type, or to escalations only.

Different request types can require different processing rules. For example, support requests, are often nonbillable, while change requests are billable.

However, it is not necessary to set up processing rules for each request type. You can set up a generic processing rule to be used for most request types, and then set up processing rules for one or more specific request types as exceptions to the generic rule.

Setting up a request processing rule

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click **Request processing rules** tab.

3. Right-click in the table and select **Insert**.

   An empty row is added to the table.

4. In the **Request type** list, do one of the following:

   - To set up a generic processing rule, leave the field blank.

   - To set up a processing rule for a specific request type, select the request type.

5. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Request processing rules tab options" on page 65.

6. Click **Save**.

Create/Edit Contract dialog, Request processing rules tab options

Field	Description
Request type list	Request type that the processing rule applies to. Use the blank value to specify all request types.
Request billing type list	Type that indicates how the request time is processed: • **Billable** – Request time is billable. • **Nonbillable** – Request time is nonbillable. • **SLA-based** – Applies the request SLA to invoicing. Request time that is within the SLA is nonbillable, and request time that is outside of the SLA is billable. • **Effort and product** – If the product has a fixed unit cost and the request processing rule is **Effort and product**, the product is billable but time is not billable. If the product does not have a fixed unit cost and the request processing rule is **Effort and product**, then both the time and product are billable. • **Fixed Fee** – Indicates that the request time is billed within a fixed fee. The **Fixed Fee** option is available only when the contract has a fixed fee billing type.
Billing role list	Billing role.
Track SLA check box	When selected, the request type can be set up with an SLA for escalation and reporting purposes. If the request billing type is not SLA-based, then the request SLA applies to request escalation only.
Fixed fee field	Fixed-fee deliverable for which the request processing rules apply. Available only when the **Fixed Fee** request billing type is selected.
View in Client Portal check box	When selected, Client Portal users can create requests of the selected request type for the contract.
SLA required in Client Portal check box	When selected, Client Portal users must have a valid SLA to create requests of the selected request type.

Field	Description
Available to ChangePoint users check box	When selected, resources can create requests of the selected type for the contract.
SLA required in ChangePoint check box	When selected, there must be a valid SLA for the contract before resources can create requests of the selected request type.

About editing request processing rules

You can edit a request processing rule provided that time for requests for the request type has not been invoiced. However, if time for the requests has been invoiced, then the following rules apply:

- If the contract does not use split billing, then you cannot edit the request processing rule until the invoices have been committed.
- If the contract uses split billing, then you cannot edit the request processing rule until all invoices for the request type have been processed and archived.

Editing a request processing rule

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Request processing rules** tab.
3. Make the necessary changes. For more information, see "Setting up a request processing rule" on page 64.
4. Click **Save**.

About deleting request processing rules

You can delete a request processing rule if it is available for editing. For more information, see "About editing request processing rules" on page 66.

However, if the request processing rule is a *default* rule that has been set up to apply to all request types, you must first create a new rule for request type that has invoices in process. The new rule must use the same billing type. For example, if an invoice is in process for a

change request type that is billable, you must create a new billable rule for change requests before you can delete the rule for all request types.

Deleting a request processing rule

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Request processing rules** tab.

3. Right-click the request processing rule and then click **Delete**.

4. Click **Save**.

Specifying a request SLA for a contract

You can set up an SLA for a request type provided that there is a request processing rule for the same request type that has the track SLA option selected.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Request SLA** tab.

3. Right-click in the table and then select **Insert**.

   An empty row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Contract dialog, Request SLA tab options" on page 68.

5. To specify 24-hour support, select the **24x7** check box.

6. To specify specific support hours:

   a. Clear the **24x7** check box.

   b. In the **Time zone** field, select the time zone.

   c. In the **Start day** and **Start time** fields, enter the start day and time.

   d. In the **End day** and **End Time** fields, enter the end day and time.

7. Click **Save**.

Create/Edit Contract dialog, Request SLA tab options

Field	Description
Request type list	Request type for which the SLA is being set up.
Product type-ahead field	Product.
Effective date field	Date when the SLA begins.
Expiry date field	Date when the SLA ends.
Priority list	Priority level for the request.
Response (hours) field	Number of hours within which the support desk must send a response for the request.
Resolution (hours) field	Number of hours within which the support desk must resolve the request.
Escalation (hours) field	Number of hours before the end of the response time (if there is no response) and again before the end of the resolution time (if there is no resolution) at which the request will be escalated. For more information, see "About request SLA escalation" on page 69.
On-site check box	When selected, indicates that on-site support is provided.
License field	License number for the product.
24x7 support check box	When selected, the SLA includes 24-hour support.
Time zone field	Time zone for the support.
Start day field	Day of the week that support begins.
Start time field	Time that support begins each day.
End day field	Day of the week that support ends.
End time field	Time that support ends each day.

About request SLA escalation

You can set up requests to be escalated both when the remaining time for the response to the request and the remaining time for the resolution of the request falls below a specified value. For example, you set the following values:

- Response hours = 8
- Resolution hours = 24
- Escalation hours = 3

If there is no response to the request after five hours (8 – 3) the request is escalated. If the request is still open after 21 hours (24 – 3) then the request is escalated again. Escalated requests are assigned to the support desk manager, and a history entry is recorded.

Editing a request SLA for a contract

You can edit a request SLA only if all invoiced time for the request has been committed.

In all cases, if there is a specific request SLA for a product that cannot be edited, then all generic request SLAs for the same product that do not specify a request type or priority cannot be edited either.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Request SLA** tab.
3. To edit a value, click the cell and then enter or select a new value.
4. Click **Save**.

Deleting a request SLA for a contract

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Request SLA** tab.
3. Right-click the request SLA and then click **Delete**.
4. Click **Save**.

Specifying default work locations and work codes for a contract

You can specify additional work locations and work codes that will be available when resources create projects, tasks or expenses for the contract. You can also specify the default work location and work code for the contract.

1. Access the contract for editing.

   The **Edit Contract** dialog box appears.

2. Click the **Work locations/work codes** tab.

   The default work location is set on the **Billing information** tab.

3. In the **Select work locations** list, expand the tree view and select the work locations.

4. To change the default work location:

   a. Right-click a work location.

   b. Select **Set as default**.

5. To allow resources to select a different work location when they are entering time for a request, select the **Allow work location override for request time** check box.

6. In the **Select work codes** list, expand the tree view and select the work codes.

7. To change the default work code:

   a. Right-click a work code.

   b. Select **Set as default**.

8. To allow resources to select a different work code when they are entering time for a request, select the **Allow work code override for request time** check box.

9. Click **Save**.

   Tip: To select (or clear) all check boxes, right-click in the **Select work locations** list or the **Select work codes** list and select **Select all** (or **Clear all**).

Index

A

audit tracking
about 8

Auto-Add Schedule Items (Product) dialog box
options 52

Auto-Add Schedule Items dialog box
options 42

B

billing addresses
about 28

billing rates
about 29
copying from the billing office 30
deleting 33
editing 33

billing types
about 27

burden rates
about 33

C

contracts
about 7
about limiting amounts for invoicing 7
accessing 7
approvals, defining 61
billing addresses, about 28
billing information, entering 21
billing rates from the billing office, copying 30
billing rates, about 29
billing rates, deleting 33
billing rates, editing 33
billing rates, setting up 30
billing types, about 27
contract information, defining 11
copying 15
copying date-based information, about 18
copying, about 15
creating 8
default work locations and work codes, specifying 70
deleting 15
editing 14
editing, about 12
fixed-fee schedules, about 38
invoice approval, about 61
invoice formats, about 28
managing access to 63
products, adding 47
products, deleting 50
products, editing 50
request SLAs, specifying 67
revenue recognition, setting up 54
time and expense approval, about 61
troubleshooting 18

Copy Contract, Additional information to copy
options 16

Create/Edit Contract dialog, Contract tab
options 12

Create/Edit Contract dialog, Fixed-fee schedule tab options 38

Create/Edit Contract dialog, Request processing rules tab options 65

Create/Edit Contract dialog, Revenue tab
options 54

Create/Edit Contract, Approvals tab
options 62

Create/Edit Contract, Billing information tab

options 21

Create/Edit Contract, Billing rates tab
options 31

Create/Edit Contract, General tab options 9

Create/Edit Contract, Products tab options 48

Create/Edit Contract, Request SLA tab
options 68

F

fixed-fee schedule items
adding 45
auto-adding 41
deleting 46
editing 46
setting up revenue recognition 57

fixed-fee schedules
about 38
adding milestones 58
auto-adding schedule items 41
creating 38
deleting 41
editing 40
setting up revenue recognition 56

I

invoice approval
defining in contracts 61

invoice formats
about 28

M

Milestone options for fixed fee schedules 59

Milestone options for products 59

P

phantom contracts
about 34

products
adding in contracts 47
adding milestones 58
setting up revenue recognition 57-58

R

request processing rule
editing 66
setting up 64

request processing rules
about 64
deleting 67
deleting, about 66
editing, about 66

request SLA
deleting 69
editing 69

request SLAs 67
about escalation 69

revenue recognition
setting up in contracts 54

S

split billing
about 34
editing for contracts 36
fixed-fee schedule items, editing 45
setting up at fixed fee level 36-37
setting up at product level 36-37
setting up for fixed-fee items 44
setting up on contracts 35

T

time and expense approval
    defining in contracts 61

W

work locations and work codes
    specifying defaults for contracts 70