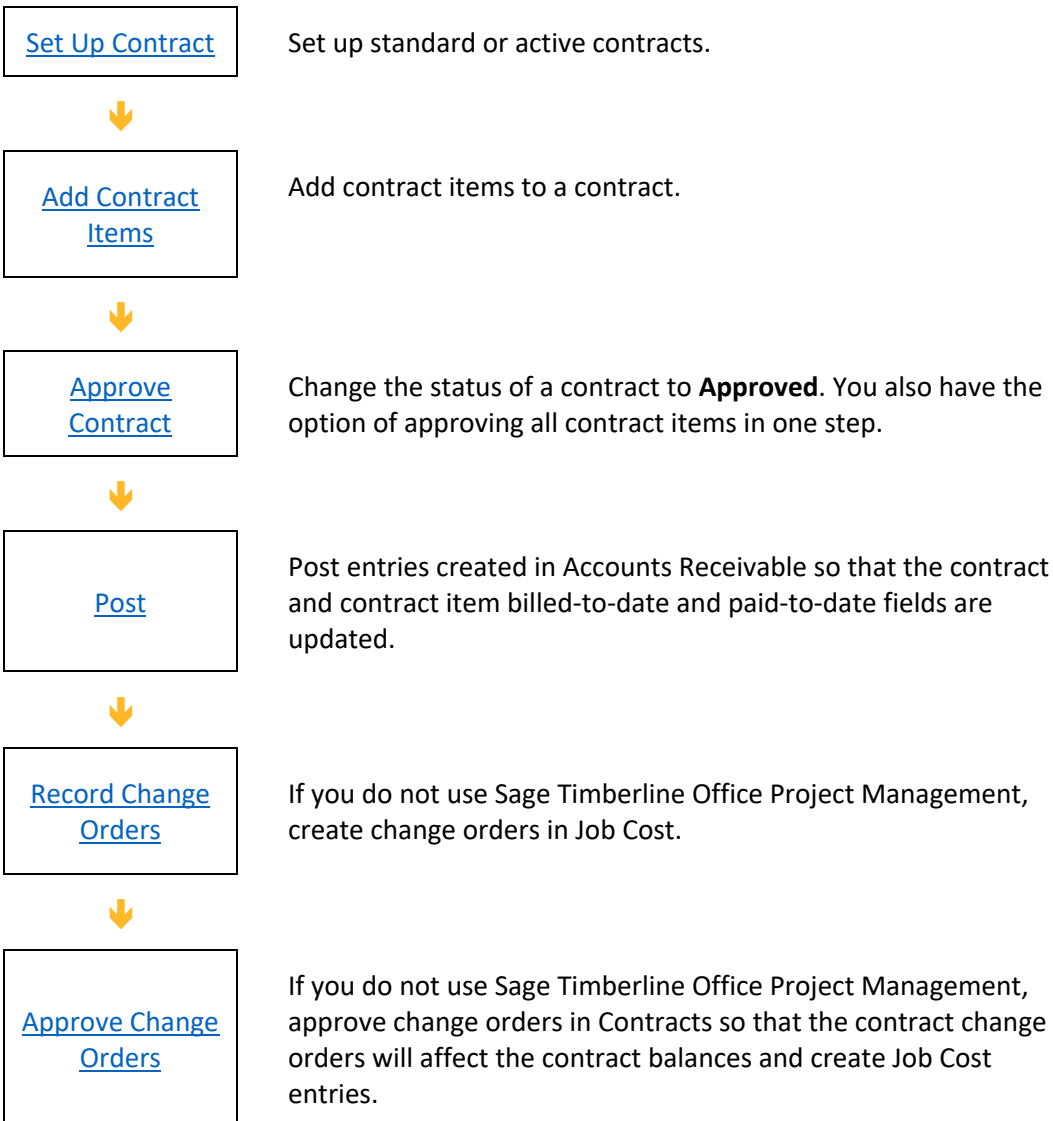


# Contracts

## Workflow Overview

The diagram below identifies the typical process for Contracts. For the most current and detailed information, refer to Help.



## Set Up a Contract

The list below identifies the typical steps for this task. For the most current and detailed information, refer to Help, specifically the “Setting up a contract” and “Linking a contract to a job, extra, or cost code” topics.

1. Select **File > New**.
2. Select the type of contract being set up: **Active** (customer) or **Standard** (template).
3. Enter the ID of the new contract.
4. Click [**OK**].
5. Complete or change the applicable information on the contract tabs as needed.
6. Add contract items as needed and complete their information.
7. If this is an active contract and it is associated with one or more jobs, extras, and cost codes, link the contract's items to the applicable Job Cost records. You can create links to only jobs that you are authorized to access which have a billing type of **Use Contracts**.

### To Link a Contract to a Job, an Extra, or a Cost Code

The list below identifies the typical steps for this task. For the most current and detailed information, refer to Help, specifically the “Linking a contract to a job, extra, or cost code” topic.

1. With the contract that you want to link open, select **View > Job Links**.
2. Select the contract item that you want to link.
3. On the **Edit** menu, select **Link**.
4. In the **Link** window, enter the ID of the job to be linked. Use the list button at the right to display a list of available jobs. Only those jobs that you are authorized to view which have a billing type of **Use Contracts** appear in the list.
5. If you use extras and you want to link the item to an extra, enter the extra's ID in the **Extra** field. Use the list button at the right to display a list of available extras.
6. If you want to link the item to a cost code, enter its ID in the **Cost Code** box. Use the list button at the right to display a list of available cost codes. If you enter a standard cost code that does not currently exist for the job (and extra), it will be set up in the Job Cost master file automatically. If you enter a group cost code, every individual cost code within the group will be linked to the item.
7. Click [**OK**].

## Add a Contract Item

If you will be using AIA-type billings and the Billing application for invoicing, be sure to read the Help topic “AIA-type billing considerations” in Billing Help.

1. Open the contract if it is not already open.
2. If items exist on this contract, click the contract item that most closely matches the new contract item being set up.
3. Select **Edit > Add Contract Item**.
4. Enter the new contract item ID in the **Add Item** window and click **[OK]**.
5. Enter or change all pertinent information on the various tabs of the new contract item.



**Notes:** You can link the job and extra to the contract item from the General tab when you add the contract item.

If record security is active, you will only be able to view contracts for jobs where you are authorized to view all jobs to which its items are linked.

Before approving a contract item, be sure to link it to a job. Once a contract item is approved, you must unapproved it to change the job link. Approved contract items can be unapproved if they meet certain conditions.

## Approve a Contract

The contract status on the General tab allows you to track the development of a contract from its proposal through completion. A contract must have an approved status before you can generate an invoice in the Billing application.

The list below identifies the typical steps for this task. For the most current and detailed information, refer to Help, specifically the “About contract status” and “Approving multiple contract items” topics.

1. Open the contract you want to approve.
2. On the **General** tab, move the **Status** slider to the **Approved** status.



**Note:** If you have unapproved contract items, the system will give you the option to approve all of the unapproved contract items.

## Post

The list below identifies the typical steps for this task. For the most current and detailed information, refer to Help, specifically the “Posting Contracts” topic.

1. From the **Tasks** menu, select **Post**.
2. Click **[Start]**.

3. Print and review the Post Entries Report. If needed, make corrections (close month) and repost.

## Enter Change Orders



**Note:** Complete this procedure in Contracts if you do not use Sage Timberline Office Project Management. Otherwise, you enter change orders in Project Management.

The list below identifies the typical steps for this task. For the most current and detailed information, refer to Help, specifically the “Entering approved change orders” and “Entering pending change orders” topics.

1. From the **File** menu, select **Open Contract** and open an existing contract.
2. From the **View** menu, select **Change Orders**; then select **Edit > Add Change Order**.
3. Enter the change order ID. Click **[OK]**.
4. Complete the change order information.



**Note:** The **Date of Revision** is required for the change order to be approved.

5. From the **Edit** menu, select **Add Change Order Item**.
6. Select the contract item to which you want to apply the change order item, or click **[New CN Item]** to create a new one. Each change order can have only one change order item for each contract item.
7. Complete the change order item information.
8. You can select **Edit > Add/Edit JC CO Links** to link the change order item to existing Job Cost change order items or to create new ones.
9. When you are finished, select **File > Close** to close the contract.
10. From the **Reports** menu, select **Change Orders > Contract Change Order Log**. Click **[Ranges]** to select the appropriate contract and change order to print.
11. Click **[Start]**.
12. Print and review the Contract Change Order Log.

## Approve Change Orders



**Note:** Complete this procedure in Contracts if you do not use Sage Timberline Office Project Management. Otherwise, you approve change orders in Project Management.

The list below identifies the typical steps for this task. For the most current and detailed information, refer to Help, specifically the “Approve Change Order (Edit menu)” topic.

1. From the **File** menu, select **Open Contract** and select the appropriate contract.
2. From the **View** menu, select **Change Orders** to view existing change orders for the contract.
3. Select the change order you wish to approve.
4. Select **Edit > Approve Change Order**; then click **[Yes]**. The change order ID now appears in bold.
5. Select **File > Close** to close the contract.
7. Click **[Start]**.
8. Print and review the Contracts journal.