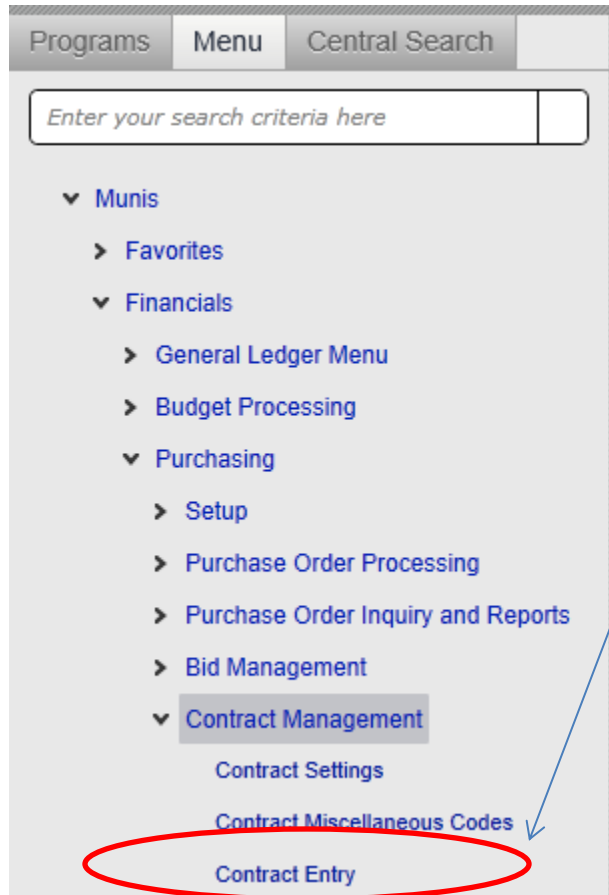


Contract Entry – “how to”



“How to” guide that walks you through the steps of entering a contract into MUNUS, if you have any questions regarding the steps or the Contract process contact the Finance Office.

CONTRACTS



STEP ONE:

Click on Contract Entry

Contract Entry - Muni [YADKIN COUNTY]

Contract Entry - Muni [YADKIN COUNTY]

Contract

Contract +1 Printed

Method To Be Rolled

Vendor ... Hold Payments

>> Change Order NONE Modified 15

Main Retainage Accounts Items Subcontractors Insurance

Main Information

Dept/Loc ...

Bid/RFP

Project

Description

Year Period

Contract type

Review code

Percent complete as of 15

Administrator ...

Workflow Notification Percentage

Dates

Estimated start 15

Estimated completion 15

Bid awarded 15

Approved 15

Initial expiration 15

Renewal action 15

Extended through 15

Days

Original

Modified




Revised

Totals

Original	<input type="text"/> 0.00	Open Req	<input type="text"/> 0.00	<input type="text"/> %	<input type="button" value="Requisitions (0)"/>
Revised	<input type="text"/> 0.00	Open PO	<input type="text"/> 0.00	<input type="text"/> %	<input type="button" value="Purchase Orders (0)"/>
Liquidated amt	<input type="text"/> 0.00	Expended	<input type="text"/> 0.00	<input type="text"/> %	<input type="button" value="Invoices (0)"/>
Encumb balance	<input type="text"/> 0.00	Available	<input type="text"/> 0.00	<input type="text"/> %	

Additional Information

STEP TWO:

- Click the GREEN PLUS  to add a new contract.
- Click the magnifying glass  to FIND a contract
- Click the browse button  to SEARCH for a contract.

STEP THREE:
Click on the +1 to number the contract - then start entering in the contract information

Contract Entry - Munis [YADKIN COUNTY]

Contract

Contract +1

Method

Vendor

Standing

Original Change Order

Status

NONE

Audit

Entered by

Entered 15

Modified 15

Main Retainage Accounts Items Subcontractors Insurance

Main Information

Dept/Loc

Bid/RFP

Project

Description

Year Period

Contract type

Review code

Percent complete as of 15

Administrator

Workflow Notification Percentage

Dates

Estimated start 15

Estimated completion 15

Bid awarded 15

Approved 15

Initial expiration 15

Renewal action 15

Extended through 15

Days

Original

Modified

Revised

Totals

Original	0.00	Open Req	0.00	%
Revised	0.00	Open PO	0.00	%
Liquidated amt	0.00	Expended	0.00	%
Encumb balance	0.00	Available	0.00	%

Additional Information

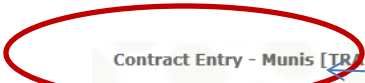
Requisitions (0)

Purchase Orders (0)

Invoices (0)

Milestones (0)

Performance (0)



STEP THREE (CONTINUED):
 This is the way the **CONTRACT ENTRY** screen should look once you have entered the data.

Contract Entry - Munis [TRAINING DATABASE Jun 6 2013]

Contract
 Contract: 20130243 +1
 Method: Encumbered Accounts
 Vendor: 4025 ... PITNEY BOWES

Printed
 To Be Rolled
 Hold Payments

Standing
 Status: CREATED
 NONE

Original
 Change Order

Audit
 Entered by: lcearlock
 Entered: 07/08/2013 15
 Modified: 07/08/2013 15 0

Main Retainage Accounts Items Subcontractors Insurance

Main Information
 Dept/Loc: 4130 ... FINANCE
 Bid/RFP: [dropdown]
 Project: [dropdown]
 Description: POSTAGE FOR FY 2014
 Year: 2014 Period: 1
 Contract type: 1 - SERVICES
 Review code: [dropdown]
 Percent complete: 0.00 as of [date]
 Administrator: [dropdown]
 Workflow: None Notification Percentage: 0.00

Dates
 Estimated start: 07/01/2013
 Estimated completion: 06/30/2014
 Bid awarded: [date]
 Approved: [date]
 Initial expiration: [date]
 Renewal action: [date]
 Extended through: [date]

Days
 Original: 364
 Modified: 0
 Revised: 364

Totals

Original	0.00	Open Req	0.00	0.00 %
Revised	0.00	Open PO	0.00	0.00 %
Liquidated amt	0.00	Expended	0.00	0.00 %
Encumb balance	0.00	Available	0.00	100.00 %

Requisitions (0)
 Purchase Orders (0)
 Invoices (0)

Milestones (0)
 Performance (0)

Workflow
 My Approvals Approve Reject Forward Hold Approvers

1 of 1 Attachments (0)

Then click the GREEN CHECK in the top left - it will take you to the ACCOUNTS TAB

You will enter the account(s) that you want the contract to come out of. Once you have entered the account information (ORG and OBJECT) you will click the GREEN CHECK.

Contract Entry - Munis [TRAINING DATABASE Jun 6 2013]

Contract 20130243 Printed
Method Encumbered Accounts To Be Rolled
Vendor 4025 PITNEY BOWES Hold Payments

Standing Original Change Order
Status: CREATED
NONE

Audit
Entered by: lcearlock
Entered: 07/08/2013 15
Modified: 07/08/2013 15 0

Main Retainage **Accounts** Items Subcontractors Insurance

Line	Year	Org	Object	Project	Description	Amount	GL Bud
1	2014	1054130	52010		SUPPLIES & MATERIALS	100.00	U

Additional Info

Totals

Original	100.00	Open Req	0.00	0.00	%	Requisitions (0)
Revised	100.00	Open PO	0.00	0.00	%	Purchase Orders (0)
Liquidated amt	0.00	Expended	0.00	0.00	%	Invoices (0)
Encumb balance	100.00	Available	100.00	100.00	%	Milestones (0)
						Performance (0)

Workflow

My Approvals Approve Reject Forward Hold Approvers

1 of 1 Attachments (0)

Once you have clicked the GREEN CHECK you will go to the INSURANCE TAB – you should have a Certificate of Insurance with each contract (if required).

You may have to Click on the UPDATE CURRENT RECORDS button to get started –

The screenshot shows a software interface with the following elements:


- Contract:** 20130243 (+1)
- Method:** Encumbered Accounts
- Vendor:** 4025 ... PITNEY BOWES
- Buttons:** Printed, To Be Rolled, Hold Payments
- Tabs:** Main, Retainage, Accounts, Items, Subcontractors, Insurance
- Table:** A table with columns: Carrier, Carrier name, Notes. The first row is highlighted in blue.
- Context Menu:** A right-click menu is open over the Carrier field, listing: Carrier (checked), Carrier name (checked), Agency, Agency name, Agent, Type, Type description, Amount, Policy, Policy start, Policy end, Notes (checked), and Reset Sort Order.
- Insurance total:** A text box containing 0.00.
- Totals:** A table with columns: Original, Revised, Open Req, Open PO, and buttons for Requisitions and Purchase Order.

1. You will need to add the AGENCY Field –

- a. RIGHT** click on the bar where NOTES is located.
- b.** Once you have right clicked you will see this menu – CLICK on AGENCY and AGENCY NAME

Once you have added those fields you should not have to enter again.

You will then enter your Carrier and Agency Information:

To enter the Carrier/Agency Information you will click on the three little dots 

Then you will search for the company – if there are not listed contact Finance and they will add the company.

You will do the same for the Agency

Contract	20130243 <small>+1</small>	<input type="checkbox"/> Printed
Method	Encumbered Accounts	<input type="checkbox"/> To Be Rolled
Vendor	4025 ... PITNEY BOWES	<input type="checkbox"/> Hold Payments

Main Retainage Accounts Items Subcontractors Insurance

Carrier	Carrier name	Agency	Agency name	Notes
<input type="text"/>	<input type="text"/> ...			
	Field help			

Insurance total

Totals Additional Information

Once you have entered the Insurance information you are ready to attach the Contract - *If the contract does NOT have an attachment it will not be posted*

Contract Entry - Munis [TRAINING DATABASE Jun 6 2013]

Contract

Contract: 20130243 +1

Method: Encumbered Accounts

Vendor: 4025 ... PITNEY BOWES

Printed

To Be Rolled

Hold Payments

Standing: >> Orig, Che

Main | Retainage | Accounts | Items | Subcontractors | Insurance

Carrier	Carrier name	Agency	Agency name
2001	LEXINGTON INSURANCE COMPANY	1004	SURREY

Insurance total: []

Totals

Original	100.00	Open Req	0.00	0.00 %
Revised	100.00	Open PO	0.00	0.00 %
Liquidated amt	0.00	Expended	0.00	0.00 %
Encumb balance	100.00	Available	100.00	100.00 %

Workflow

My Approvals | Approve | Reject | Forward | Hold

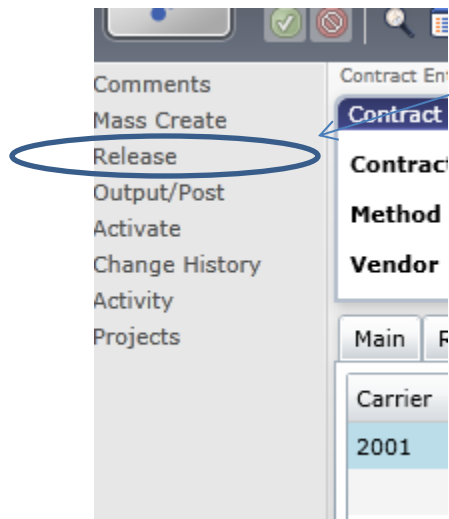
1 of 1 | Attachments (0)

To attach the Contract – You will need to scan in the contract or contact Tanya for an electronic copy

1. You can click on the PAPER CLIP on the top **OR**
2. You can click on the word **ATTACHMENTS** at the bottom

They both take you to the same place

From there you will add your document and then click RELEASE in the left hand menu



Now your part is complete. The contract has gone to Finance to Post, and once it is posted you can start using it.

If you have any questions regarding the Contract process or Contract Entry please contact Lisa Hughes or Lindsey Cearlock in the Finance Office.