

Creating a New Contract and Reporting Payments in the LPA DBE System

1. Creating Contracts

2. Searching For and Viewing Contracts

Searching for contracts

Viewing your contract list

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Viewing the Contract Management page

Viewing detailed contract information

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The B2Gnow contract record contains the data collected between your organization and the prime contractor for construction, goods, or other types of services. In some situations we import contracts electronically into B2Gnow from an external system; in others the records are manually entered. The B2Gnow contract record manages common contract data, such as contract dollar value, prime contractor, and relevant dates. It also manages data specific to your contract compliance tracking and reporting needs. This data includes goal types, goal percentages, funding sources, subcontractor awards, and other relevant fields.

The B2Gnow contract record contains a large amount of data and is linked to other system records including prime contractors, subcontractors, buyers, and Contract Compliance Officers (CCO). The contract record and associated records are typically managed by the CCO.

1. Creating Contracts

During the implementation process, B2Gnow configures your contract fields and settings based on your organization's preferences. You can create contracts directly in the system or your organization may have an interface that imports records from an external system (see the B2Gnow Data Import Process).

NOTE: Some fields and options may be different based on your organization's configuration.

To create a contract:

1. Open the **Create** menu, and then click **New Contract**
2. Complete the form. All items with a red asterisk * are required

On this page, you can compose your contract. There are two steps to this process: (1) Composing and (2) Reviewing your contract. When you're finished co

* required entry

Contract Information	
You must enter a contract title and maximum value. The assigned department field is optional.	
Contract Title *	<input type="text"/>
Contract Number *	<input type="text"/>
Contract Value (\$) *	<input type="text"/>
Contract Secondary Status	None selected ▼
Contract Holder/Owner *	Arizona Local Public Agency Name shown to contractors as the contract owner/paying organization
Department *	None selected
TRACS Project Number	<input type="text"/>
Federal Project Number *	<input type="text"/>
ECS Contract Number	<input type="text"/>

Contract Dates	
Enter a contract start date and end date. These are the dates that you want the auditing (if selected) to begin and end.	
Award/Start Date *	<input type="text"/> (mm/dd/yyyy) (Pro
Notice To Proceed Date	<input type="text"/> (mm/dd/yyyy)

Prime Contractor Information	
The contract must be assigned to a prime contractor. Enter the B2Gnow user number for the prime contractor, or click Get Vendor to search and select a user.	
Prime Contractor *	Get Vendor from vendor database
Prime Compliance Contact *	None selected ▼ Contact not listed? QuickAdd a new compliance contact.
Prime Address *	None selected ▼ Address not listed? QuickAdd a new address.

3. To verify information, click **Review**.
4. Click **Save**.

2. Searching for and Viewing Contracts

You can complete a search for your contracts or quickly view your contract list. After locating the contract you want to work with, you can open it to view and update the contract details.

Searching for Contracts

To complete a search, enter or select search parameters on the Search: Contracts page. You can complete a search as broad or narrow as you want. For example, you can search for all contracts assigned to your department or only search for contracts assigned to you.

To search for a contract

1. From the **Search** menu, click **Contracts**.
2. Enter or select search parameters. For search tips, see Chapter 1 – System Overview: Tips for performing searches.

The screenshot displays the UTRACS LPA DBE System interface. At the top, there are navigation tabs for 'Users', 'Vendors', and 'Contracts'. Below the tabs, a search instruction reads: 'Search your organization's contract database. Enter information into any of the boxes below and click **Search**. Some parameters are required.' To the right of this instruction are two buttons: 'Search First 20 Matches' and 'Search All Matches'. On the left side, there is a vertical navigation menu with options like Home, View, Search, Vendors, Certified Vendors, Users, Contracts, Search Results, Reporting, Create, Tools, Settings, Help & Support, and Logoff. The main content area is divided into two sections: 'Search Parameters' and 'Additional Search Parameters'. The 'Search Parameters' section includes fields for 'CONTRACT/REFERENCE NUMBER', 'CONTRACT TITLE', 'CONTAINING TEXT', 'CONTRACTOR' (with radio buttons for Prime, Subcontractor, and Either), 'BUYER/PROJECT MANAGER', and 'COMPLIANCE OFFICER' (with a dropdown menu set to 'None selected'). The 'Additional Search Parameters' section includes fields for 'DIVERSITY GOAL' (with a range selector), 'DEPARTMENT' (with a dropdown menu set to 'None selected'), 'CONTRACT TYPE' (with a dropdown menu set to 'None selected'), 'CONTRACT CATEGORY' (with a dropdown menu set to 'None selected'), and 'CONTRACT STATUS' (with a dropdown menu set to 'All').

3. Click **Search First 20 Matches**.
The matching results display. You can click a contract number or title to view more information about a specific contract.

To view contract record details from a search

1. Search for and locate the contract you want to view.
2. To access the contract main page, click the **Contract Number**, **Contract Title**, or **System Transaction #**.

To resort, click on column title.

Contract Number	Contract Title	Prime Contractor	Contract Amount & End Date	System Transaction #
	All ▾	All ▾	ALL ▾	All ▾
100010001	Service contract	B2Gnow Test Vendor 4	\$50,000.00 12/31/2012	00703034-001 Subs Audit

3. To view the vendor profile, click the name of the **Prime Contractor**.
The Vendor Profile displays in a popup window.
4. To access the **Contract Management: Subcontractor List** page, click the **Subs** hyperlink.
5. To access the **Contract Audit: Audit Summary for Total Contract** page, click the **Audit** hyperlink.

Additionally, you can perform actions after completing a search, such as sending a contract letter or adding the prime contractors from the search results to an outreach campaign.

To perform actions after a contract search

1. Search for the contracts for which you want to perform an action.
2. To return to the Search: Contracts page, click **Search Again**.

To resort, click on column title.

Contract Number	Contract Title	Prime Contractor	Contract Amount & End Date	System Transaction #
	All ▾	All ▾	ALL ▾	All ▾
100010001	Service contract	B2Gnow Test Vendor 4	\$50,000.00 12/31/2012	00703034-001 Subs Audit

1 - 1 of 1 record displayed: Page 1 ▾

3. To compose a letter or select a letter template to send, click **Send Contract Letters**, and then click **OK**.

NOTE: If you selected the contract goal status search parameter, the button is **Send Not Meeting Goal Letters**.

4. To export the list, click **Export**, and then specify the details you want to export and click **Export Records**. If prompted, follow the browser instructions for saving the file.
5. To send a message to all prime contractors listed in the search results, click **Message Contract Contacts** and complete the fields to send the message, as necessary.

6. To add prime and sub contractors listed in the search results to an existing outreach campaign, click **Add Primes & Subs to Outreach Campaign**, click **OK**, and then complete the fields, as necessary.
7. To add only the prime contractors listed in the search results to an existing outreach campaign, click **Add Only Primes to Outreach Campaign**, click **OK**, and then complete the fields, as necessary.
8. To add only the sub contractors listed in the search results to an existing outreach campaign, click **Add Only Subs to Outreach Campaign**, click **OK**, and then complete the fields, as necessary.

To search for your contracts

1. From the **Search** menu, click **Contracts**.
2. From the **Contract Compliance Officer** list, select your name.

Search Parameters ?	
Contract/Reference Number	<input type="text"/> <small>(Contract number, financial system reference, project number)</small>
Contract Title	<input type="text"/>
Containing Text	<input type="text"/> <small>(Contract description, summary, notes, comments)</small>
Contractor	<input type="text"/> <input checked="" type="radio"/> Prime <input type="radio"/> Subcontractor <input type="radio"/> Either
Buyer/Project Manager	<input type="text"/> <small>(Organization name, contact name)</small>
Contract Compliance Officer	None selected <input type="button" value="v"/>

3. Click **Search All Matches**.
A list of your contracts display. You can click a title to view more information about a specific contract.

Viewing Your Contract List

From the Data Dashboard, you can easily view information about your contracts, such as the number of active contracts and audits. You can also access the Diversity User Control Panel: Contracts page to view and sort through your contract list.

To view your contract list and contract details

1. From the **Data Dashboard**, click the **Contracts** hyperlink.

Data Dashboard		
view data dashboard		
Contracts and Concessions [Hide]	Contracts	Concessions
Total active	1	0
Audited	1	0

2. Use the lists to filter the number of contracts that display.

Diversity User Control Panel: Contracts [Help & Tools](#)

[Contracts](#) | [Contract Audits](#) | [Workforce Audits](#) | [Concessions](#) | [Conc Audits](#) | [Outreach](#) | [Cert Apps](#) | [Cert Change Requests](#) | [Applications](#) | [Support](#) | [Messages](#)

Displays all contracts. Click the transaction number to view.

Show ONLY contracts assigned to you

1 - 1 of 1 records displayed: [Previous Page](#) < Page 1 > [Next Page](#) Records per page 20

To resort, click on column title. [Refresh Table](#)

Actions	Alert	Status	Secondary Status	Contract #	Description	Prime	End Date	Amount
All	Open	All	All	All	All	All	All	
View	End within 6 mo.	Open			B2Gnow Test Vendor 4 Service contract		10/1/12 - 12/31/12	\$50,000.00

3. To view contract details, click the **View** hyperlink.

3. Working with the Contract Management Page

After opening the contract you want to view, you can use the tabs on the Contract Management window to navigate and perform actions for different sections of the contract. For example, you can navigate to the Subs tab to add or edit a subcontractor, complete actions for prime contractors, and communicate with contractors.

Contract Management [Help & Tools](#)

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100010001: Service contract
Prime: B2Gnow Test Vendor 4
10/1/2012 - 12/31/2012

Status: **Open**
Current Award: **\$50,000**
Goal: **0.00%** Total Paid: **\$0**
% Credit: **0.00%** For Credit: **\$0**

Viewing the Contract Management Page

When you open the contract, the Contract Management page displays with the Main contract tab open. You can view basic contract information, alerts, and status history, and access hyperlinks for updating and changing your contract's alerts and status.

Contract Management
Help & Tools

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100010001: Service contract
 Prime: **B2Gnow Test Vendor 4**
 10/1/2012 - 12/31/2012

Status: **Open**
 Current Award: **\$50,000**
 Total Paid: **\$0**
 For Credit: **\$0**

Goal: **0.00%**
 % Credit: **0.00%**

[Refresh Page](#)

Contract Information ?

Contract Title	Service contract
Contract Number	100010001
Prime Contractor	B2Gnow Test Vendor 4
System Transaction Number	00703034-001
Award/Start Date	10/1/2012
End Date	12/31/2012
Maximum Value	\$50,000.00

Contract Alerts ?

Alert 1	Goal is ZERO (edit , deactivate alert).
Alert 2	No SUBCONTRACTORS assigned to contract (assign , deactivate alert).

Contract Status & Actions ?

	Status	Actions	Previous Transactions
Contract Status	Open	View Contract , Edit Contract , Close Out Change Secondary Status to: None selected <input type="button" value="v"/>	
Contract Compliance Officer	Assigned	Change Compliance CCO to: Houston Admin7 <input type="button" value="v"/>	Assigned to: Houston Admin7
Contract Compliance Monitoring	Automatically (Monthly)		
Subcontractors	No subs	Manage Subcontractors .	
Task Orders		Create Task Order	
Contract Amendments		Amend Contract , Change Value	None
Contract Extensions/Shortenings		Extend/Shorten Contract	None
Other Functions		Delete Contract , Vendor Archive , Full Archive , Copy Contract	


Contract Status History ?

Date/Time	Status	SubStatus	User
9/26/2012 1:38:02 PM CDT		Contract Created	Houston Admin7
9/26/2012 1:38:02 PM CDT	Open		Houston Admin7

Listed items are for date and time of user action. Close action date may not match contract close date.

Viewing Detailed Contract Information

On the **Contract: View** page, you can view contract details, including settings and file attachments. You cannot update information from this page.

Contract: View Help & Tools 

Main | **View** | Settings | Subs | Docs | Change Orders & Task Orders | Alerts | Comments | Messages | Closeout

Compliance Audit List | Compliance Audit Summary | Compliance Audit FY | Reviews | Site Visits | Reports

100010001: Service contract Status: **Open**
 Prime: **B2Gnow Test Vendor 4** Current Award: **\$50,000**
10/1/2012 - 12/31/2012 Goal: **0.00%** Total Paid: **\$0**
% Credit: **0.00%** For Credit: **\$0**

This is a detailed listing of the Contract.

Contract Information ?

Contract Title	Service contract		
Contract Number	100010001		
System Transaction Number	00703034-001		
Assigned Department	CS		
Current Contract Value	\$50,000.00		
Original Contract Value	\$50,000.00		
Contract Value Change	\$0.00		
Contract Secondary Status			
Council Motion Number			
Old Contract Number			
CIP #/WBS #			
Additional Reference 1			
Additional Reference 2			

Contract Dates ?

Award/Start Date	10/1/2012	End Date	12/31/2012
Notice To Proceed Date		Approval Date	
Initiation Date		Work Order Date	

Prime Contractor Information ?

Vendor Name	B2Gnow Test Vendor 4		
System Vendor Number	20018259		
Vendor Compliance Contact Person	Justin Talbot-Stern		
Phone	602-325-9277		
Fax	602-325-9277		
Email	b2gnowtest4@b2gnow.com		
Address	5025 N Central Ave., #494 Phoenix, AZ 85012		

Prime Contractor Information - Original Data ?

Vendor Name	B2Gnow Test Vendor 4		
Vendor Contact Person	Justin Talbot-Stern		
Phone	602-325-9277		
Fax	602-325-9277		
Email	b2gnowtest4@b2gnow.com		

Buyer/Project Manager Information ?

Organization/Department	CS		
System User Number	10000005-001		
Division			
Project Manager Contact Person	Contract Administrator		
System User Number			
Phone	713-123-1232		
Fax	713-123-1233		
Email	department5@cityofhouston.net		
Address	City Hall Building Concourse Level 901 Bagby Suite B-113 Houston, TX 77002		

Additional Organization Contacts ?			
Contact Role			
Contact Name			
Department			
Email			
Phone			
Fax			

Contract Settings ?					
Diversity Goal(s)	Goal Type	Required Goal	Proposed/Committed Goal	Waiver	Actual Goal
	MBE:	30.000%	0.000%	0.000%	0.000%
	WBE:	0.000%	0.000%	0.000%	0.000%
	DBE:	0.000%	0.000%	0.000%	0.000%
	SBE:	0.000%	0.000%	0.000%	0.000%
Total Goal:		30.000%	0.000%	0.000%	0.000%
External Funding Sources					
Contract Type					
Contract Category					
Waiver	No				
Exempt Status	No				
Contract Process	Competitive Bid				
Funding Source					
Federal Funding Source					
Wage Schedule					
Funding Code					

Compliance Audit Settings ?	
Compliance Tracking	Yes - Submission of contract compliance reports will be required.
Contract Compliance Audit	Automatically - create audits every month starting from award/start date and ending when contract is manually closed.
Payments to Prime Contractor	Entered by staff or from financial system
Payments to Subcontractors	Self-reported online by prime contractor; only prime can report subcontractor payments at all tiers
Confirmation by Subcontractors	Yes - subcontractors will be contacted to confirm payment amounts
Subcontractor Zero Payment Auto-Confirmation	No - zero value payments must be confirmed by subcontractors
Require Reporting of Sub Paid Date	Yes - subcontractor paid date will be required.
Collect Retainage Information	Yes - subcontractors will be able to report retainage information.
Allow Sub to Designate Final Payment	Yes - subcontractor can designate their final payment.

Workforce/Prevailing Wage Settings ?	
Workforce Tracking	No

Contract Summary ?	
Commodity Codes	
Contract Summary	
Special Notes	

Contract Files ?	
Contract File(s)	View Attachments

5. Reporting Payments

Payment Reporting in the LPA DBE System

Contract Management: Compliance Audit List

MPTEST, Test
Prime: Test Vendor
3/1/2019 - 3/1/2024

Goal: 0.00%
Current Award: \$75,000
Total Paid: \$0
% Credit: 0.00%
For Credit: \$0

Audit Period	Status	Paid To Prime	Total Lines	Reported By Prime	Not Reported By Prime	Confirmed By Sub	Not Confirmed By Sub	Disputed By Sub	Date Posted	Actions
		Amount	Lines	Amount	Lines	Amount	Lines	Amount		
TOTALS		\$0	0	0	0	0	0	\$0	0	\$0
Feb. 2019										Add Audit
Jan. 2019										Add Audit

Audit not posted for this period - [Add Audit](#)
Audit not posted for this period - [Add Audit](#)

[Mark ALL Remaining Prime Entries as Zero](#) [Mark ALL Unconfirmed Sub Entries as Confirmed](#)

[Extend Reporting Deadline By Two Weeks From Today](#)

1. Click on "Compliance Audit List"
- Then select the month you are reporting payment for, and click on "Add Audit"

Contract Management: Compliance Audit List

MPTEST, Test
Prime: Test Vendor
3/1/2019 - 3/1/2024

Goal: 0.00%
Current Award: \$75,000
Total Paid: \$0
% Credit: 0.00%
For Credit: \$0

Audit Period	Status	Paid To Prime	Total Lines	Reported By Prime	Not Reported By Prime	Confirmed By Sub	Not Confirmed By Sub	Disputed By Sub	Date Posted	Actions
		Amount	Lines	Amount	Lines	Amount	Lines	Amount		
TOTALS		\$0	0	0	0	0	0	\$0	0	\$0
Feb. 2019										Add Audit
Jan. 2019										Add Audit

Audit not posted for this period - [Add Audit](#)
Audit not posted for this period - [Add Audit](#)
[Add Audit and Notify Prime](#) [Add Audit For Specific Subcontractor](#)

[Mark ALL Remaining Prime Entries as Zero](#) [Mark ALL Unconfirmed Sub Entries as Confirmed](#)

[Extend Reporting Deadline By Two Weeks From Today](#)

2. Click on "Add Audit and Notify Prime"



3.
Click "OK"

Contract Management: Compliance Audit List

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NOTES: Test
 Prime Test Vendor
 3/31/2019 - 3/31/2024

Status: Open
 Current Award: \$75,000
 Total Paid: \$0
 % Credit: 0.00% For Credit: \$0

Compliance Audit List

Audit Period	Status	Paid To Prime	Total Lines	Reported By Prime		Not Reported By Prime		Confirmed By Sub		Not Confirmed By Sub		Disputed By Sub		Date Posted	Actions	
				Lines	Amount	Lines	Amount	Lines	Amount	Lines	Amount	Lines	Amount			
TOTALS		\$0	0	0	\$0	0	0	\$0	0	\$0	0	\$0	0	\$0	3/11/23	View Audit
Feb-2019																
Jan-2019																

Audit not posted for this period - Add Audit
 \$0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

4.
Click on "View Audit"

Mark ALL Remaining Prime Entries as Zero

Extend Reporting Deadline By Two Weeks From Today

Mark ALL Unconfirmed Sub Entries as Confirmed

Compliance Audit: Audit Summary for January 2019

Help Tools

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Compliance Audit List | Compliance Audit Summary | Compliance Audit FY | Site Visits | Reports

MP1511 Test
 Prime Test Vendor
 3/1/2019 - 3/1/2024

Status: Open
 Current Award: \$75,000
 Total Paid: \$0
 % Credit: 0.000%
 For Credit: \$0

W Ebs This Compliance Audit Refresh

Compliance Audit Information

Compliance Audit Time Period: **January 2019**

Compliance Audit Status: None selected | Location: **Locals**

Compliance Audit Reference: **04293645.0002**

System Audit Number: **04293645.0002**

Date Probed: **Local: 3/11/2019 5:48:56 PM CDT**

Final Audit? **No (Wait Audit as Goal)**

Payment to Prime: **Not Reported - Submit**

Add Comment

Compliance Audit Summary - January 2019 and Totals To January 2019

	January 2019	Percent	Totals to January 2019	Percent
Contract Award Value & Goal Paid to Prime	Payments: \$0.00	Not Reported	Payments: \$75,000.00	Goal: 0.0000%
For Credit Payments	\$0.00	0.0000%	\$0.00	0.0000%
For Credit to DBE Goal	\$0.00	0.0000%	\$0.00	0.0000%

Mark Unconfirmed Sub Entries as Confirmed

Extend Reporting Deadline By Two Weeks From Today

Prime Contractor - January 2019

5.
 Click on "Submit"

Compliance Audit: Prime Payment Detail for January 2019 CLOSE WINDOW

Payment Information

COMPLIANCE AUDIT TIME PERIOD: **January 2019**
 PAYMENT TO PRIME: **Not Reported**
 PAYMENT DATE:
 COMMENTS:

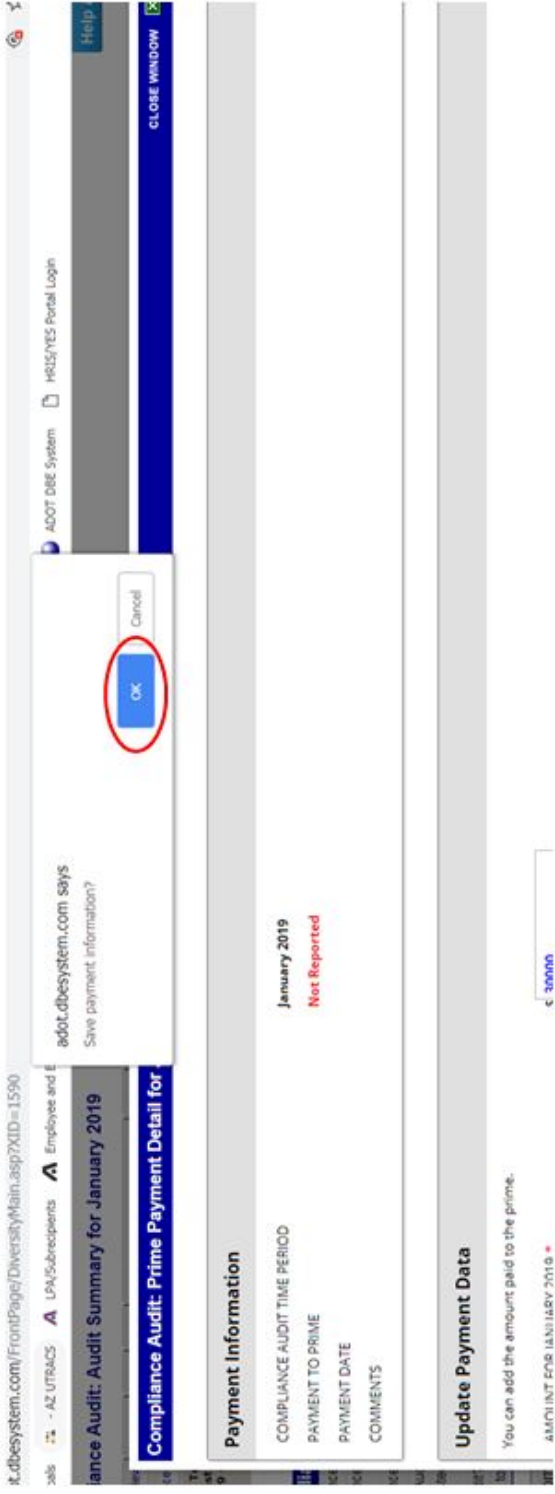
Update Payment Data

You can add the amount paid to the prime.

AMOUNT FOR JANUARY 2019 *
 PAYMENT DATE (mm/dd/yyyy)
 COMMENTS *

Customer Support
 Copyright © 2019 BEGroup. All rights reserved.

6. Enter amount, payment date, and comments



7.
Click "OK"

6. Closing Contracts

On the Contract Management: Close Contract page, you can view contract details in preparation for closing a contract. If the payments have been reported and confirmed, and the contract is complete, you can use the fields to close the contract.

Contract Management: Close Contract Help & Tools

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100010001: Service contract Status: **Open**
 Prime: B2Gnow Test Vendor 4 Current Award: **\$50,000**
 10/1/2012 - 12/31/2012 Goal: **0.00%** Total Paid: **\$10,000**
% Credit: **12.50%** For Credit: **\$1,250**

Contract Status

Contract Status: **Open**
 Contract Secondary Status: **None selected**
 Final Audit Indicated by Prime?: **No**

Close Contract

Close Date *: (mm/dd/yyyy)
 Prime Contractor Rating: **Not Rated**

Audit Summary - Total Contract

	Award	Award Percent	Payments	Payments Percent	Difference (Payments - Award)
Prime Contract	\$50,000.00		\$10,000.00		
For Credit	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to DBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to MBE Goal	\$0.00	0.000%	\$1,250.00	12.500%	12.500% above goal
For Credit to SBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
For Credit to WBE Goal	\$0.00	0.000%	\$0.00	0.000%	Goal matched
Contract Progress	20.0% <div style="width: 20%; background-color: black; height: 10px;"></div>				
For Credit Progress	0.0%				
Total Unpaid Retainage	\$0.00				
Unpaid Retainage Percentage	0.000%				

Award values may not match due to differences between overall contract goal and subcontractor assignments.

Prime Contractor

Prime Contractor	Cert	Inc. in Goal	Contracted Percent	Actual Percent	Prime's Share of Payments	Actual Payments TO Prime	Actions
B2Gnow Test Vendor 4 [Info] Justin Talbot-Stern P 602-325-9277, F 602-325-9277 b2gnowtest4@b2gnow.com	No	No	85.000%	87.500%	\$8,750.00	\$10,000.00	Print Letter

Click prime name to view payment history for this contract. Click contact person's name to send them a message.

Subcontractors

Subcontractor	Certified	Type	Inc. in Goal	Contracted Percent	Actual Percent	Actual Amount	Unpaid Retainage	Actions
Sub Flooring, LLC [Info] Veronica Lopez sub@b2gnow.com P 602-325-9277, F 602-325-9277	No	Sub 100%	MBE	15.000%	12.500%	\$1,250.00	\$0.00	Print Letter

Click subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

When a contract is complete, it must be closed. A CCO can close a contract when necessary. Additionally, prime contractors can indicate on their audits that it is time for closeout. On the Dashboard, there is a row for Closeouts and Final Audits. Click the number to view the contracts for which a prime contractor indicated a final audit.

Contract Audits [Hide]	Last 30 days	Last 3 months	Last 12 months
Total Audits	3	7	8
Incomplete Audits >>	1	1	1
Closeouts/Final >>	1	1	1

TIP: A incomplete compliance audits must be cleared, along with any discrepancies, before a contract can be closed.

To close a contract

1. If necessary, locate and open the contract.
2. On the **Contract Management** page, click the **Closeout** tab.
3. Click **Close Out Contract**.

Contract Status ?

Contract Status	Open
Contract Secondary Status	None selected ▾
Final Audit Indicated by Prime?	No

Close Contract ?

Close Date *	<input type="text"/> <small>(mm/dd/yyyy)</small>
Prime Contractor Rating	Not Rated ▾

Close Out Contract
View Audit Summary With 'Final Audit' Text

4. Click **OK** to confirm you want to close the contract.