

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

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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 u	
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 tabs for 'Users', 'Vendors', and 'Contracts'. Below the tabs, a search bar prompts the user to '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 the search bar are two buttons: 'Search First 20 Matches' and 'Search All Matches'.

The main search area is divided into two sections: 'Search Parameters' and 'Additional Search Parameters'.

Search Parameters:

- CONTRACT/REFERENCE NUMBER: Text input field.
- CONTRACT TITLE: Text input field.
- CONTAINING TEXT: Text input field.
- CONTRACTOR: Radio buttons for 'Prime' (selected), 'Subcontractor', and 'Either'.
- BUYER/PROJECT MANAGER: Text input field.
- COMPLIANCE OFFICER: Dropdown menu with 'None selected'.

Additional Search Parameters:

- DIVERSITY GOAL: From [] % to [] % (enter values into either or both).
- DEPARTMENT: Dropdown menu with 'None selected'.
- CONTRACT TYPE: Dropdown menu with 'None selected'.
- CONTRACT CATEGORY: Dropdown menu with 'None selected'.
- CONTRACT STATUS: Dropdown menu with 'All'.

On the left side of the page, there is a navigation menu with links for Home, View, Search, Vendors, Certified Vendors, Users, Contracts, Search Results, Reporting, Create, New Vendor, New Contract, New Support, New Message, Tools, Settings, Help & Support, and Logoff.

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 ▾

Search Again

Send Contract Letters

Export

Message Contract Contacts

Add Primes & Subs to Outreach Campaign

Add Only Primes to Outreach Campaign

Add Only Subs to Outreach Campaign

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 ▼

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		Contracts	Concessions
[Hide]			
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.										
<input checked="" type="checkbox"/> 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			
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
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										
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](#)

[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
 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**

[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 ▼	
Contract Compliance Officer	Assigned	Change Compliance COO to: Houston Admin7 ▼	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
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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**

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

Payment Reporting in the LPA DBE System

Then select the month you are reporting payment for, and click on "Add Audit"

Click on "Add Audit and Notify Prime"

Extend Reporting Deadline By Two Weeks From Today

Contract Management: Compliance Audit List

Extend Reporting Deadline By Two Weeks From Today



3.
Click "OK"

Contract Management: Compliance Audit List

Help & Tools

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

NOTE: Test Prime Test Vendor 3/1/2019 - 3/1/2024

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

Audit Period	Status	Paid To Prime	Total Lines	Reported By Prime		Confirmed By Sub		Not Confirmed By Sub		Disputed By Sub		Date posted	Actions
				Lines	Amount	Lines	Amount	Lines	Amount	Lines	Amount		
TOTALS		\$0	0	0	\$0	0	\$0	0	\$0	0	\$0		
Feb 2019													
Jan 2019													
		Not reported	0	0	\$0	0	\$0	0	\$0	0	\$0	3/11/20	View 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

4.
Click on "View Audit"

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 *

\$ 30000

PAYMENT DATE

1/10/2019 (mm/dd/yyyy)

COMMENTS *

Invoice # 987654321

Save

Spell Check

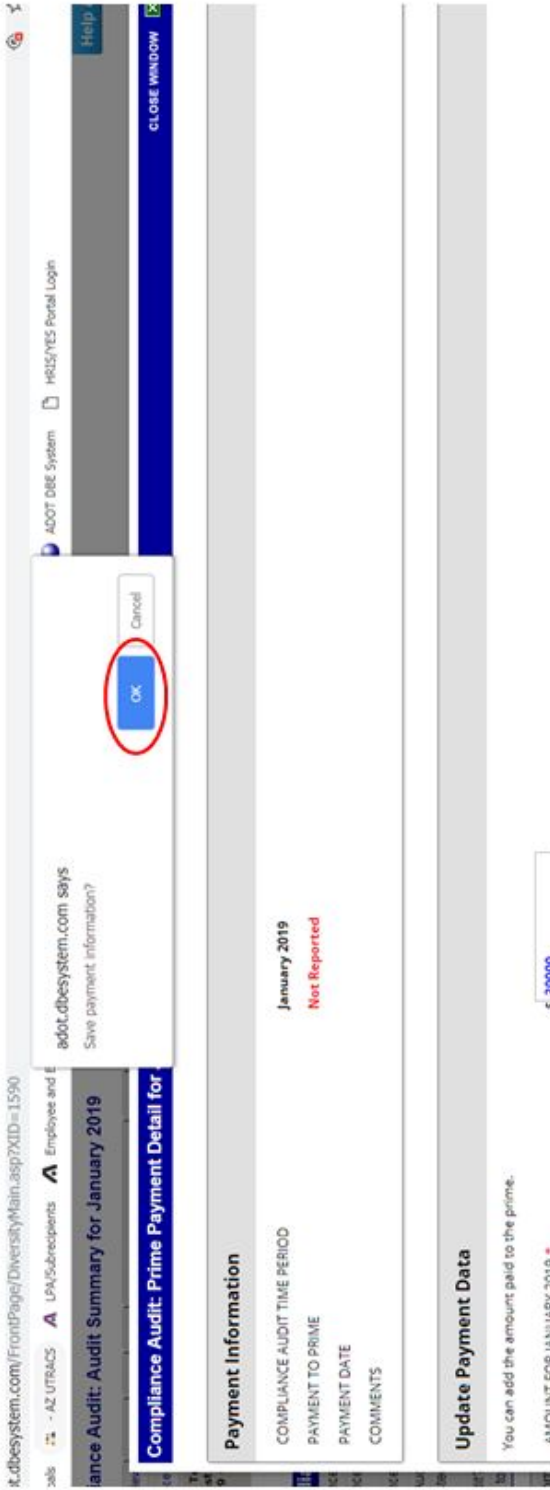
Clear Payment Info

Customer Support

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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
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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: **\$10,000**
 For Credit: **\$1,250**

Goal: **0.00%**
 % Credit: **12.50%**

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**

[Close Out Contract](#) | [View Audit Summary With 'Final Audit' Text](#)

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%				
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.

[Print ALL Subcontractor Close Out Letters](#)


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 *



(mm/dd/yyyy)

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.