



Contracts:

Current Status

Description

Beginning Date 

Ending Date 

Contract for Receiving Funds Paying Funds

Current Status: This will always be automatically filled in, and shows the status of the submission whether you’re creating a new one or viewing/editing/copying one that’s already been created.

Description: Here, enter a short description of the contract.

Dates: Here, enter the starting and ending dates for your contract.

Contract for: Here, select whether or not the contract is an agreement where your project will receive or pay funds. If neither, just select one and continue, noting it in the description above.

Other Party Entity Person

Other Party: Here, select whether you are interacting with an individual person or with an organization, such as a company or foundation.

After making your selection, a dropdown menu will appear and ask you to select a specific Entity or Person from a list of Entity/Persons associated with your project:

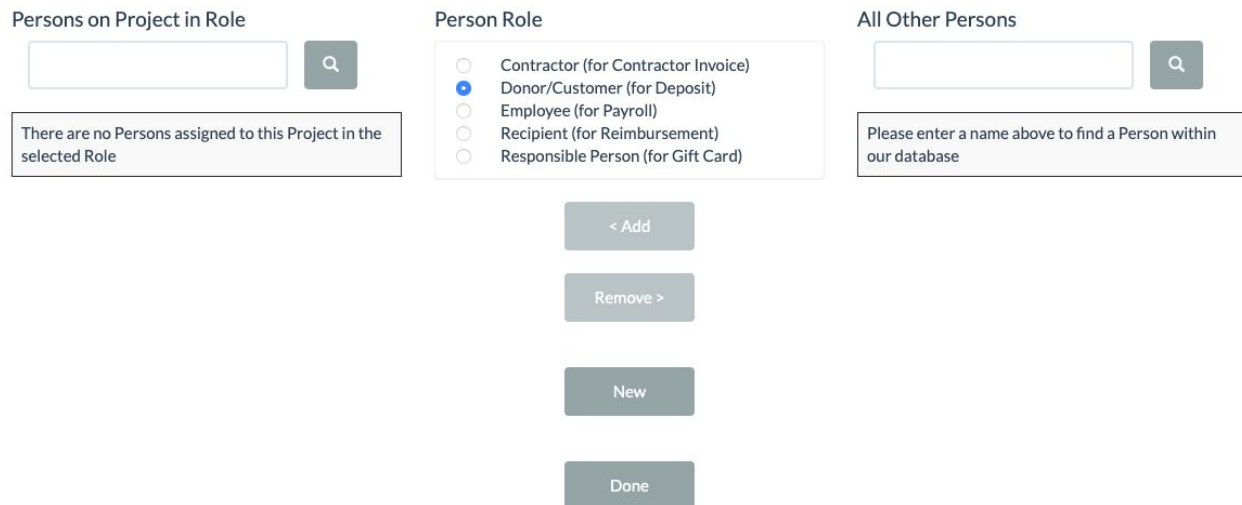
Other Party Entity Person

Entity

Please note, if the Entity or Person does not show up in this list, you must click on the gray “New” button to the right of the dropdown menu that appeared, and then follow these steps. If not, skip to the “Details on Schedule and Deliverables” section further below:

Adding a Person/Entity via the “New” Button within a Request:

Clicking the “New” button saves the submission that currently being worked on and brings you to a page that looks like the image below.



The interface consists of three main columns and a central button area. The left column, titled 'Persons on Project in Role', contains an empty search box and a message: 'There are no Persons assigned to this Project in the selected Role'. The middle column, titled 'Person Role', contains five radio button options: 'Contractor (for Contractor Invoice)', 'Donor/Customer (for Deposit)', 'Employee (for Payroll)', 'Recipient (for Reimbursement)', and 'Responsible Person (for Gift Card)'. The right column, titled 'All Other Persons', contains a search box and a message: 'Please enter a name above to find a Person within our database'. Below these columns are four buttons: '< Add', 'Remove >', 'New', and 'Done'.

On the right side, you should first search whether or not the Person/Entity has already been added into the database-- if they have, upon searching their name will be displayed in the right-hand column after searching.

You can move forward and associate them with your project by clicking on their name to select it, and then clicking the “<Add” button. Doing so allows them to show up in the dropdown menu.

If they haven’t been added into the database already (that is to say, if they didn’t show up after searching in the right-hand column), you can click the “New” button in the center column to add them. You don’t need to worry about the Person/Entity role-- the system automatically picks that for you from the context of the submission from which you entered this screen!

If you’ve clicked the “New” button and filled out their information, click “Save” at the bottom of the screen. After doing so, typing their name on the right side of the Add New Person/Entity screen (in the box underneath “All Other Persons”) will reveal their name. From there, click the “<Add” button to associate them with your project, and then click “Done” to return to your submission.