

## Creating a Contract using the Contract Wizard

### **Abstract**

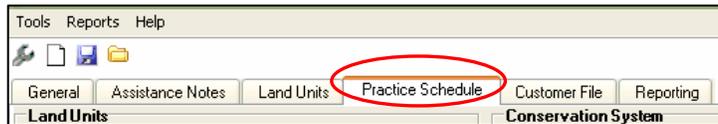
This guide will demonstrate how to create a contract document and a contract file that can be uploaded into Protracts.

*Steps: Start Contract Wizard - Select Contract Information - Add Components - Select Participants - Set Preferences - Save File - Check Accuracy & Print*

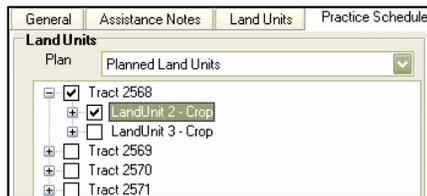
### **Details**

#### Start Contract Wizard

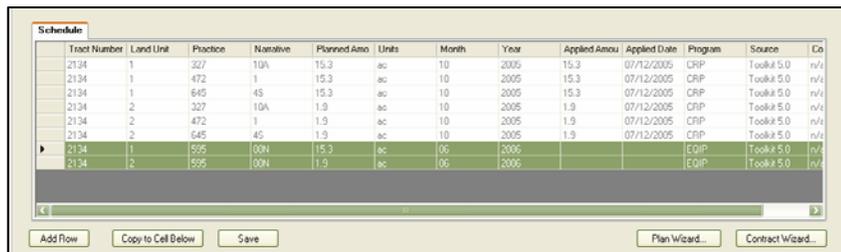
1. With the *Customer File* open, go to the *Practice Schedule* Tab.



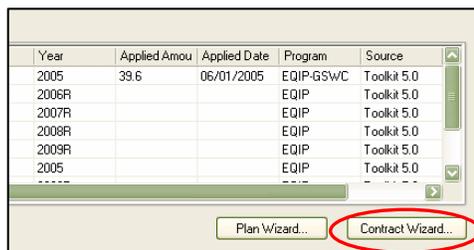
2. Make sure only the Land Units you want included in the contract, are checked.



3. **Select** only the practice(s) that will be included in the contract. This will exclude any practices that should not be in the contract (i.e. practices scheduled under a different program).



4. Click the **Contract Wizard** Button.

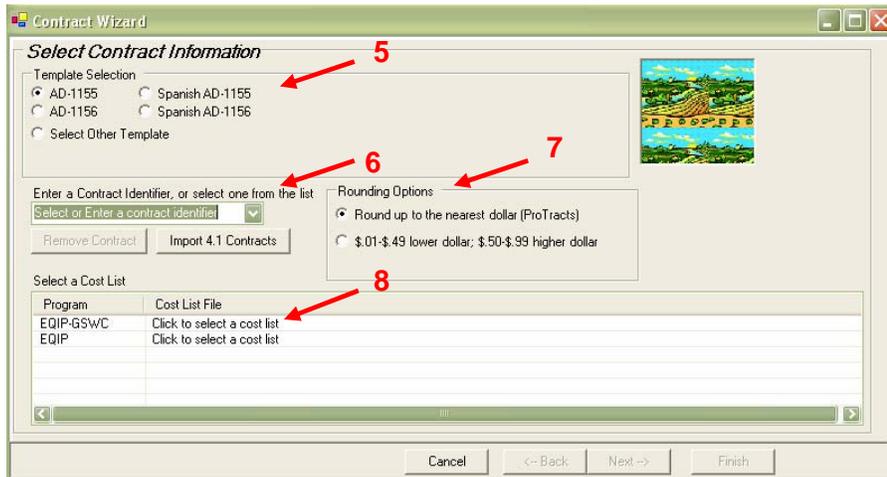


Select Contract Information

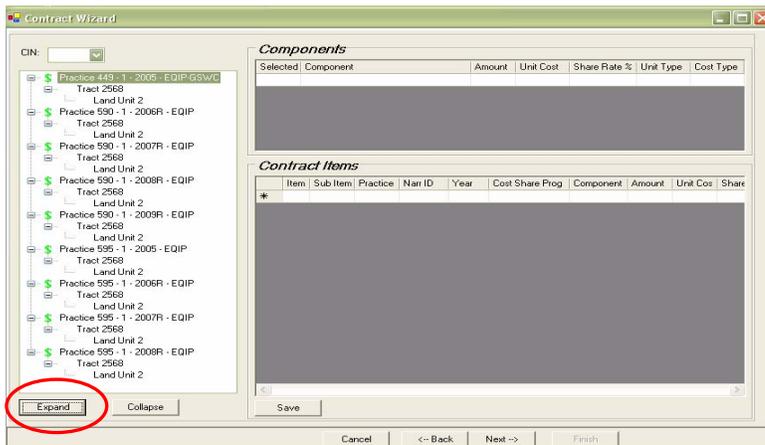
5. **Select** a Template (see graphic 5). The AD-1155 is a standard contract, AD-1156 is a legal revision of an existing contract.
6. **Type** in a *Contract Identifier* (see graphic 6). The format for the identifier is usually program name followed by the fiscal year (i.e. EQIP\_FY06).
7. Under *Rounding Options*(see graphic 7), **select** *Round up to nearest dollar (Protracts)*.
8. **Select** a cost list by **clicking** on the words *Click to select a cost list* (see graphic 8). Cost lists are usually found in the following directory:

F:\FOTG\Section\_I

**Note:** If you have a line with a non-cost shared program, you do not need to choose a cost list for this line.



9. Once everything is filled out, **click the Next** button. This will open the main contracting window.
10. **Click the Expand** button to see all of the Land Units (see graphic below).



Description - along the left side of this window is an outline structure referred to as the *Practice List*.

Each heading under the *Practice List*, (symbolized by the \$) consists of four items: Practice, Narrative ID, Year, and Program. This heading is called the *Practice Heading*.

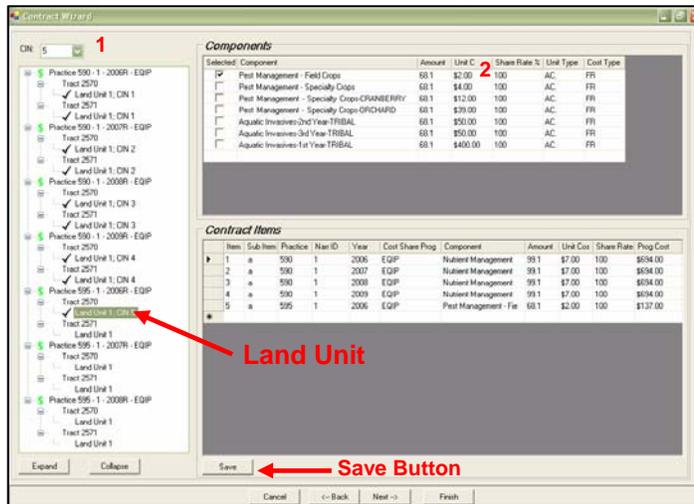
Under the *Practice Headings* are the tracts and land units that have these four items planned on them.

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Add Components

11. **Click** on a *Land Unit* so that it is highlighted (see graphic below).
12. **Select** one or more components from the “Components” area.
13. Repeat for all cost-shared items.
14. When all CINs (Contract Item Numbers) have been created, **click** the **Save** button (see graphic below).

**Note:** Every time you select to a new *Practice Heading* and give a land unit a component, a CIN appears after it in the outline.



**Problems you may encounter:**

- Two different land units in a Scheduled Practice Heading that have different components - if you assign a component to a land unit under a Scheduled Practice Heading and then try to assign a different component to another land unit in the same Scheduled Practice Heading, Contract Wizard tries to assign both components to both land units. The rule is, all land units in the same Scheduled Practice Heading, with the same CIN, need to have the exact same components.

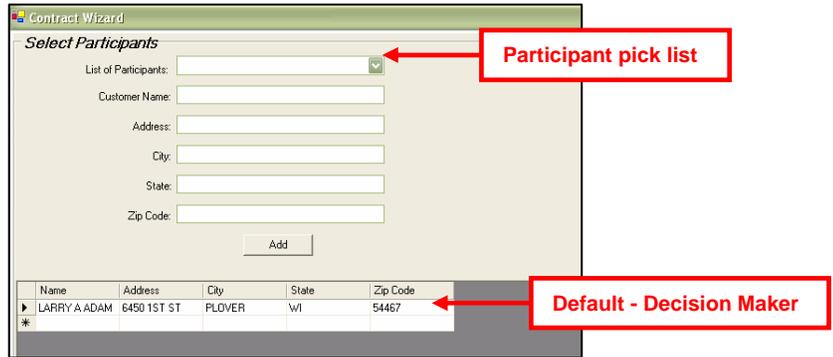
Fix - assign a different CIN to the second land unit - highlight the land unit. Go up to the drop down menu next to the CIN (see graphic above - 1), and **select** the last number in the list. **Select** the correct component(s). You will have land units, within the same Scheduled Practice Heading, that have two different CIN's.

- Missing Unit Cost (a Unit Cost of \$0.00 under the *Contract Items* area)

Fix - In the *Components* area, click in the *Unit Cost* cell and enter in correct unit cost (see graphic above - 2), type in the correct amount, and hit your **Enter key**.

Select Participants

15. Once all of the CINs have been developed, click the **Next** button. The *Select Participants* window will open.



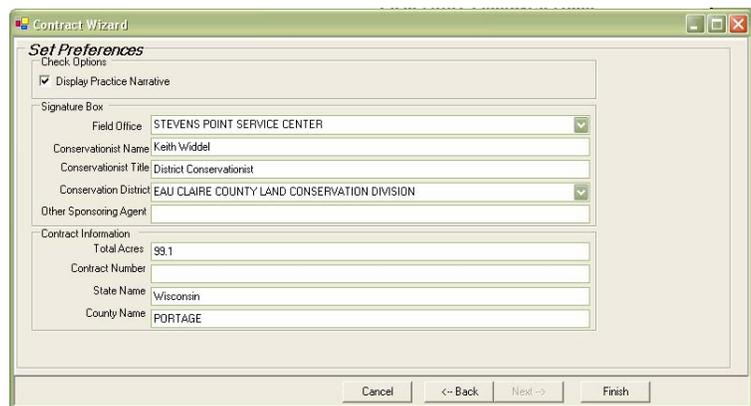
16. The *Decision Maker's* name is put in by default (see above graphic).

- Add any additional participants that should have a signature block on the contract document by:
  - Using the *pick list* (see graphic above) and **clicking** the **Add** Button.
  - OR by **manually typing** in the name of the participant.

**Note:** You can remove names by **selecting** the row and pressing the **Delete** key.

Set Preferences

17. Click the **Next** button and the *Set Preferences* window will open.



18. Set your Preferences

- Verify the all information is correct.
- Add information (i.e. contract number)

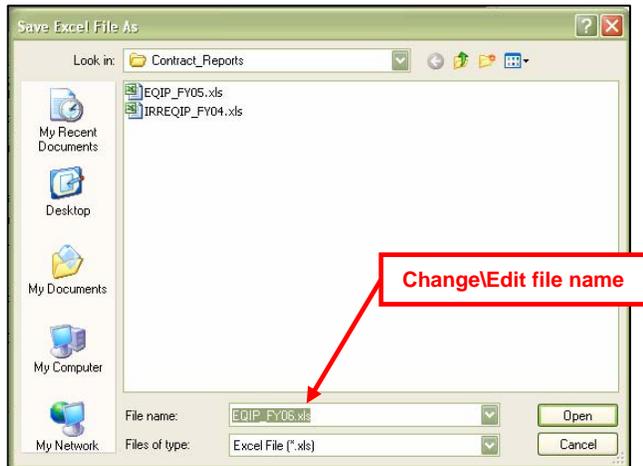
**Wisconsin Toolkit Task Guide**

19. Click the **Finish** button.

Save File

20. The *Save Excel File As* window will open.

- The *Contract Identifier* defaults into the *File name*.
- **Change/Edit** the file name as applicable (see graphic below).
- Click the **Open** button.



21. The *Contract Document* opens up.

| COMPLETION SCHEDULE AND ESTIMATED COST SHARE OR PAYMENT BY YEAR (For Non-Cost Share Bids Show N/A) | REP NO. |      |      |      |      |      |      |      |      |      |      |
|--|---------|------|------|------|------|------|------|------|------|------|------|
| 14   | 15      | 16   | 17   | 18   | 19   | 20   | 21   | 22   | 23   | 24   | 25   |
| 2008   | 2007    | 2006 | 2005 | 2004 | 2003 | 2002 | 2001 | 2000 | 1999 | 1998 | 1997 |
| 100%   | 100%    | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

| FIELD     | TREATMENT           | ESTIMATED AMOUNT (\$/AC) | COST SHARE (%) | TOTAL COST (\$/AC) |
|-----------|---------------------|--------------------------|----------------|--------------------|
| Fields: 1 | Nutrient Management | 99 ac                    | 7.00           | \$694              |
| Fields: 1 | Nutrient Management | 99.1 AC                  | 7.00           | \$694              |

Check Accuracy & Print

22. Look over the contract to check accuracy (i.e. check to make sure the correct years have the correct amounts).

23. Print out a copy of the contract.