

## **Create/Modify Contracts in Alden ONE**

To have access to Contracts in Alden One, work with your Company Administrator to ensure you have the correct permission for Contracts.

#### Create a Contract in Alden One

- 1. To create Contracts in Alden One, click the **Menu**, hover over **Accounting**, and click **Create Contracts**.
- 2. In the new form, fill in the fields for the contract as needed.

alden NE Pole ~		Q 💿 Save	d Views 🗸 📃 Menu 🗸	PRO USER ⑦
Q Assigned To Me	Conversation Sea Q Poles on	Map New Contract Creating New Co	×	
	Header			~
	Contract Number:	Alternate	Contract Contract Type:	~
	Owner Parity:	% Billing Type:	✓ Contract Status:	~
	Contract Description:			
	Billed From Account:	QB	ill To Account:	
	Bill From		Bill To	
	Company Name:		Company Name:	
	Address:		Address:	
	City:		City:	
	State:		State:	
	Zip:		Zip:	
	Contact Name:		Contact Name:	

3. Click Save.

alden	Q 💿	Saved Views V Henu V	·	PRO USER (?)
Q Assigned To Me Q Conversation Sea	Q Poles on Map	с <sub>о</sub> Х		
Header				~
Contract Numb	er: 0124578 Alte	rnate Contract Number:	Contract Type:	~
Owner Pari	ty: % Billing Type	Net Billing 🗸	Contract Status: Active	~
Contract Descriptio	m: TBD			
Billed From Accou	nt: 001 TEST Q	Bill To Account: 001 TEST	Q	
Bill From		Bill To		
Company N	lame:	Company Name:		
Ado	iress: 123 1st	Address: 123 1st		
	City: Spokane	City: Spokane		
	State: WA	State: WA		
	<b>Zip:</b> 99201	<b>Zip:</b> 99201		
		Save		

Information contained in this document is the property of Alden Systems. Copyright @ 2024 Alden Systems, Inc., Reg. U.S. Pat & TM Office.



- 1. Within Alden One, click the Saved Views button.
- 2. Under Quick Views, select Contract.
- 3. Use the **Refine** link to the right of **Contract Filters** or other methods to find the contract you wish to edit.
- 4. Click the Contract link on the contract you wish to edit.

alden NE Pole ~			Q 💿 Sav	ed Views	∼ 🗏 Menu 🗸			PRO USER (	, <mark>(</mark> ) :
Q Assigned To Me	rsation Sea	Q Poles on Map	Q Contract	×					
	Urap Text						Take Action 🗸	Select view type:	▲ ^ Map
Assets Searched	✓ Contract ( <sup>4</sup>	04)							
Cellstructure								Show/Hide Column	s ~
Conversation     Pole     Streetlight	Contract Id	2	Contract Type	T	Contract Number 012345678 TEST	Primary Account 0 001 TEST	Code 🍸 Co	ntract Status	1
Show More	<u>14841110</u>	1	None						_ []
Keyword Search Q	<u>14835086</u>	2	None						
No keywords applied.	14835086	3	None						
Contract Filters Refine	<u>14835086</u>	ā	None						
No filters applied.	<u>14835086</u>	1	None						
Show Shared Data	14835086	1	None						
Attachment Category	<u>14835086</u>	2	None						
Billing Frequency ID	<u>14835086</u>	L	None						• •
Clear Filters Apply Filters	↑ View All			25 🗸	<< < 1 2 3 4	5 > >>			
Save View	0 Selected								

- 5. Change the contract fields as needed.
- 6. Click Save.

Assigned To Me Conversation Sea. Poles on Map Contract     Image: Provide the terms     Image: Photos     Billed From Account:     Billed From Account:     Contract Description:     Billed From Account:     Contract Status:     Address:     123 1st     City:     Spokane     State:     WA     Zip:     9201     138489736     138489736     138489736     12345678 TEST     Alternate Contract   Notes   Contract Number:        Contract Number:     13245678 TEST        Alternate Contract        Owner Parity:   %   Billing Type:   Net Billing   Contract Contract Status:   Active           Contract Number:              Address:   123 1st   City:   Spokane   State:   VA   Zip:   99201	alden E Pole ~			Q 💿 Saved	Views 🗸 📃 Men	u ~		avsadmin Admin Avista Utilities PRO USER ⑦
Image: Related Conversations   Image: Related Conversations   Image: Related Attachments   Image: Rel	Q Assigned To Me	ersation Sea Q Pol	les on Map	) Contract	×	×		
Image: Photos     Image: Pho	Peader       Image: Line Items     C       Q Related Conversations       If Related Attachments       If Notes     C       Documents     C	Header Contract Number: 0 Owner Parity: Contract Description: TI	12345678 TEST % BD	Alternate C N Billing Type: Net E	ontract Imber:	•	Contract Type: Agreement Contract Status: Active	
K History     Company Name:     Company Name:       Address:     123 1st     Address:       Address:     123 1st     Address:       City:     Spokane     City:       State:     WA     State:       Zip:     99201     Zip:	Photos C	Billed From Account:	01 TEST	В	Bill To			
Address:     123 1st       City:     Spokane       State:     WA       Zip:     99201	X History	Company Name:		•	Company Name:			
State:         WA         State:         WA           Zip:         99201         Zip:         99214		Address: City:	123 1st Spokane		Address: 1 City: S	23 1st pokane		
Zip: 99201 Zip: 99231		State:	WA		State: V	/A		
		Zip:	99201		Zip: 9	929		

Information contained in this document is the property of Alden Systems. Copyright © 2024 Alden Systems, Inc., Reg. U.S. Pat & TM Office.



### Delete a Contract in Alden One

- 1. Within Alden One, click the Saved Views button.
- 2. Under Quick Views, select Contract.
- 3. Use the **Refine** link to the right of **Contract Filters** or other methods to find the contract you wish to delete.
- 4. Click the Contract link on the contract you wish to delete.

alden E Pole ~			Q • Saved Views	; 🗸 📃 Menu 🗸			PRO USER (2)
Q Assigned To Me Q Conve	ersation Sea	Q Poles on Map	⊇ Contract X				
🕅 Results Returned 104	Urap Text					Take Action 🗡 Select view	type: 🛗 & ^
Assets Searched	✓ Contract (1)	104)					
Cellstructure						Show/H	Hide Columns 🗸 🗸
Conversation     Pole     Streetlight	Contract Id	Contra	act Type 🔻	Contract Number 012345678 TEST	Primary Account C     001 TEST	iode <b>Y</b> Contract Status Active	7
Show More	<u>14841110</u>	8 None					
Keyword Search Q	14835086	9 None					
No keywords applied.	<u>14835086</u>	8 None					
Contract Filters <u>Refine</u>	<u>14835086</u>	5 None					
No filters applied.	<u>14835086</u>	4 None					
Show Shared Data	<u>14835086</u>	3 None					
Attachment Category	<u>14835086</u>	2 None					
Billing Frequency ID	14835086	1 None					
Clear Filters Apply Filters	^ View All		25 🗸	<< < 1 2 3 4	5 > >>		
Save View	0 Selected						

- 5. From the Contract, select the **Contract Status** drop-down.
- 6. Choose **Cancelled**, **Expired**, or **Terminated** from the list.
- 7. Click Save.

**NOTE:** There isn't currently a way to fully remove a contract from your record history.

alden NE	ole 🗡			Q 💿	Saved Views 🖂 🗏 Menu	<ul> <li>✓</li> </ul>	avsadmin Admin Avista Utilities PRO USER ⑦
Q Assigned To Me	Q Conve	rsation Sea	2 Poles on Map	Q Contract	× 158489796 Contract	×	
E Header		Header					^
🚞 Line Items	0	Header		Alter	roate Contract		
Q Related Conversations	5	Contract Numb	er: 012345678 TEST	Alter	Number:	Contract Type:	~
Related Attachments		Owner Pari	ty: %	Billing Type:	Net Billing 🗸	Contract Status: Terminated	
Notes	0	Contract Description	n: TBD				
Documents	0	Pilled From Assou	at 001 TEST	0	BIII To Accounts 001 TECT		
Photos	0	Billed From		Q	Bill To		
X History		Gamma			Gamman Namu		
		Company N	ame:		Company Name:		
		Ado	Iress: 123 1st		Address: 123 1s	st	
			City: Spokane		City: Spoka	ne	
		:	State: WA		State: WA		
			<b>Zip:</b> 99201		Zip: 992.11		
					Save		

Information contained in this document is the property of Alden Systems. Copyright @ 2024 Alden Systems, Inc., Reg. U.S. Pat & TM Office.



# Add Line Items (and Rate Types) to a Contract in Alden One

- 1. Within Alden One, click the **Saved Views** button.
- 2. Under Quick Views, select Contract.
- 3. Use the **Refine** link to the right of **Contract Filters** or other methods to find the contract to which you wish to Add Lines.
- 4. Click the Contract link on the contract to which you want to Add Lines.

alden			Q 💿 s	aved Views 🗸 📃 Menu 🗸		PRO USER	<mark>ء (ک</mark>
Q Assigned To Me	nversation Sea	Q Poles on Map	Q Contract	×			
Results Returned 104	K Wrap Text				1 Iso	Take Action 🗡 Select view type: 🛗	Map ^
Assets Searched	✓ Contract (	104)					
Cellstructure						Show/Hide Column	is 🗸
Conversation     Pole     Streetlight	Contract Id	6	Y Contract Type	Contract Number 012345678 TEST	Primary Account Code     001 TEST	Contract Status Active	7
Show More	14841110	8	None				
Keyword Search	Q □ <u>14835086</u>	9	None				
No keywords applied.	14835086	8	None				
Contract Filters Refine	<u>14835086</u>	5	None				
No filters applied.	<u>14835086</u>	4	None				
Show Shared Data	<u>14835086</u>	3	None				
Attachment Category	<u>14835086</u>	2	None				
Billing Frequency ID	<u>14835086</u>	1	None				<b>▼</b>
Clear Filters Apply Filters	│ へ View All			25 🗸 << 1 2 3 4	5 > >>		
Save View	0 Selected						

5. From the Contract, click the **Line Items** tab (on the left).

alden NE 🛛 🖻	ole 🗸	
Q Assigned To Me		rsation Sea Q
📄 Header		Llaadau
🚞 Line Items	0	Header
Related Conversations		contract Number:
Related Attachments		Owner Parity:
Notes	0	Contract Description:
Documents	0	
Photos	0	Billed From Account:
History		Bill From
		Company Nam

6. Click the **Add Line Item** button.

alden)

alden NE 🧧 Po	le 🗸					Q 💿 Saved	d Views $$	E Menu	~
Q Assigned To Me	Q Conve	ersation Sea	Q Poles	on Map		ontract	× 🖹 <sup>158</sup> Con	<b>489796</b> tract	×
Header		Contract Line I	tems (0)	+ Add Line Iter	n 🖻	ake Action∽			
Eine Items	0	No records av	vailable.	7					
Q Related Conversations									

7. In the **Create Contract Line** Item window, fill in the information needed.

Create Contract Line Item	×
Owner:	
~	
Contract Rate Type:	
Q	
Rate:	
Start Date:	
month/day/year	
Expiration Date:	
month/day/year	
Cancel Apply	

**NOTE:** To assign the Rate Type to the Contract, if it's a new Rate Type, you must first select **Menu** hover over **Accounting** and click **Rate Types** before you can select it in this window. See the <u>Add New</u> <u>Rate Types</u> section for additional information.

8. Click Apply.

alden



#### Add New Rate Types

1. Within Alden One, click the **Menu**, hover over **Accounting** and click **Rate Types**.

😑 Menu 🛛 🗸		
Click an action name to execute it. Click t Pin to add frequently used actions to you tab tray.	he ır	PRO USER (2)
Q Recent Conversation Types	>	Take Action 🖌 Select view type: Grid
$\widehat{\mathfrak{Q}}$ Start a Conversation	>	
S Accounting	>	♦ Account Billing Info
<del>ः।</del> Create Utility Pole		♦ Account Configurations
🕅 Run Reports	$\otimes$	♦ Accounts
දිබු View Admin Page	$\otimes$	Create Contracts
View Reference Page	$\bigotimes$	Rate Types         Ø

2. The existing Rate Types are listed and you could click on their links to edit them. To add a new Rate Type, click the **Add Rate Types** button.

alden NE (	Pole 🏏		Q ⊙ Saved Views ∨	∃ Menu 🗸		PRO USER ⑦
Q Assigned To Me	Q Conversation Sea	Q Poles on Map	ontract X Rate Typ	es X		
Add Rate Types				Q		
Take Action 🗸					Show Deleted	Show/Hide Columns ∨
Description	🕈 Unit Of Measure	Account Configuration	n 🝸 Require Poles	T Recurring	T Rate	T Departmen
Application Fee		DEFAULT	No	No	0	^
Wireline Annual Rent		DEFAULT	No	No	0	

- 3. Fill in the **Create** form.
- 4. Click **Apply**.

Description	~	Unit Of Measure	•	Account Configuration	•	Require Poles
		Fixed			•	
Recurring	~	Rate		Taxable	~	Comment
Start Date		Expire Date				
month/day/year	***	month/day/year				/

Information contained in this document is the property of Alden Systems. Copyright © 2024 Alden Systems, Inc., Reg. U.S. Pat & TM Office.