	CUSTOMER CONTRACTS SOLUTION WALKTHROUGH 2016 RELEASE **DATE: THURSDAY, NOVEMBER 12, 2015** **TIME: 9:00 AM – 12:00 PM** **LOCATION: 2000 EVERGREEN STREET SACRAMENTO, CA 95815** **ROOM: JADE/SAPPHIRE**

Facilitators:	Ben Montie – CMO Gina Esperanza & Edmond Lee – BT Kamna Joshi - Accenture
Meeting Purpose: **Type of Meeting:**	Customer Contracts Solution Walkthrough 2016 Release

AGENDA TOPICS/MINUTES

#	Topic	Presenter	Duration
1	■ Solution Walkthrough Objectives ■ Customer Contracts Solution Overview ■ Customer Contracts Processes ☐ Create Customer Contracts ☐ Activate Customer Contracts ☐ Amend Customer Contracts ☐ Close Customer Contracts ■ Technology Considerations ■ Session Recap ■ Q&A Session	Ben Montie & Gina Esperanza	180 Mins

QUESTIONS AND ANSWERS

Q1: When we are in the Customer Contracts module, do we have to keep in mind federal funds and reimbursements?	A1: Yes, the Customer Contracts module also processes reimbursements.
Q2: Regarding closing and overnight processing, is there a window of time or grace period after closing that will allow us to make changes?	A2: No. Once the contract is closed, it is effectively immediately. This is why we at FI$Cal stress the importance of ensuring there are no errors and that all of the funds have been expended and recorded.
Q3: If we closed a customer contract at the end of December and a year later, we realize we need to be reimbursed for that contract, how do we make changes?	A3: You have to create a new contract and unlink the project and activity from the previous or old one to the new one. You can just change the ID# to a sub ID by adding a number or a letter after the original ID#.
Q4: How can we link multiple contracts to a project?	A4: You can link a project to multiple contracts but the activity has to be unique.