

# **Quik-Biz Contract Management System**

**Administration and User Guide**



**TPS of Illinois, Incorporated**

[www.tps-of-il.com](http://www.tps-of-il.com)

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## Quik-Biz Contract Management System - Introduction

Thanks for purchasing your copy of the Quik-Biz Contract Management System by TPS of Illinois, Incorporated ([www.tps-of-il.com](http://www.tps-of-il.com)).

We have created a ready-to-go application that can be used right away to:

- Create a complete database of all your existing contracts
- Report on milestones, obligations and rights
- Manage all documents related to your contract in one central location

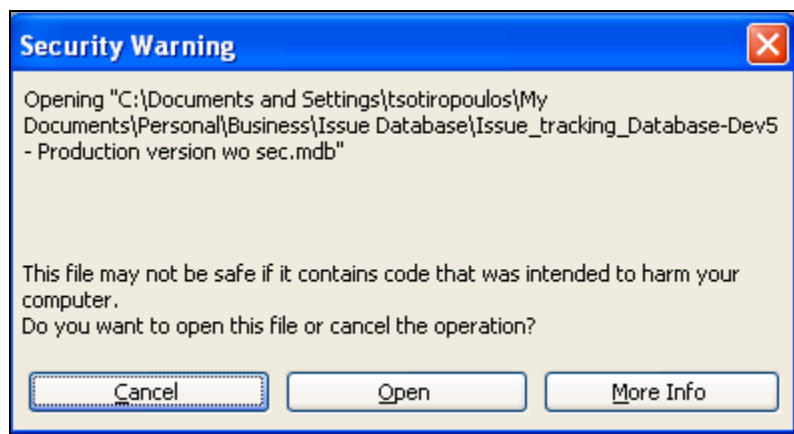
All you require is to have Microsoft Access 2000 or greater installed on your computer to use this application.

Enjoy and if you have any questions or comments, please contact us by visiting our website ([www.tps-of-il.com](http://www.tps-of-il.com)).

## Getting Started

Follow these steps to begin using your new Quik-Biz Contract Management System.

1. Double click on the MS Access file/icon to open the database. Note: all users need to have MS Access installed on there computer in order to utilize this system.
2. When you get the following screen, click on "Open".

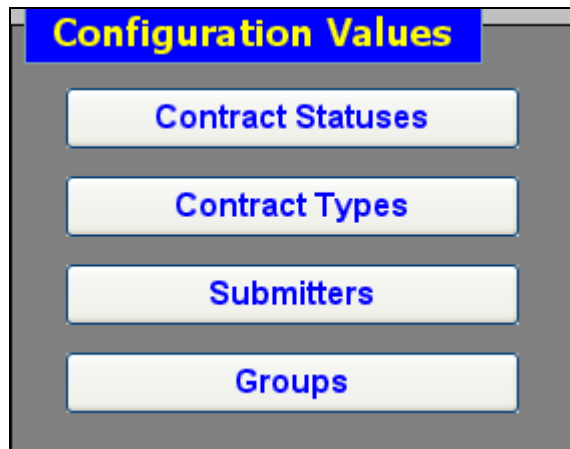


3. This will then take you to the Quick Bill System home page. From here you can click on the appropriate button to access the function you require.



The Quik-Biz Contract Management System can be setup to meet your specific business needs. You can use the following configurations to set the system up the way you like.

(**Note:** We have provided you a baseline configuration for the application. Any configuration can be inactivated by simply unchecking the **Active**  checkbox.)



Configuration	Description	Example
Contract Statuses	The current status that your contract is in.	<ul style="list-style-type: none"> <li>▪ Open</li> <li>▪ Closed</li> <li>▪ Cancelled</li> </ul>
Contract Types	The type of contract or agreement you are tracking.	<ul style="list-style-type: none"> <li>▪ Building Lease</li> <li>▪ Software License</li> <li>▪ Consulting Services</li> </ul>
Submitters	Individual in the organization that requested the contract or is responsible for maintaining the agreement.	<ul style="list-style-type: none"> <li>▪ Employees within your organization (i.e. Jon Smith)</li> <li>▪ Outside counsel</li> </ul>
Groups	Group or department within your organization that requested or is responsible for maintaining the agreement.	<ul style="list-style-type: none"> <li>▪ Finance</li> <li>▪ IT</li> <li>▪ Marketing</li> </ul>

## Entering/Maintaining Suppliers



Before creating your contract tracker within the Quik-Biz Contract Management System, you will need to create the supplier (i.e. vendor, consultant, and third-party) that you are contracting with.

On this screen (see below), you will add/update the Company name and any additional information you would like to capture for this specific company.


All fields on the Supplier Maintenance screen are optional.

Supplier Maintenance

<p><u>Company Name</u> <input style="width: 90%;" type="text"/></p> <p><u>Active</u> <input checked="" type="checkbox"/></p> <p><u>Address1</u> <input style="width: 90%;" type="text"/></p> <p><u>Address2</u> <input style="width: 90%;" type="text"/></p> <p><u>City</u> <input style="width: 70%;" type="text"/></p> <p><u>State</u> <input style="width: 60%;" type="text"/></p> <p><u>Zip</u> <input style="width: 50%;" type="text"/></p> <p><u>Phone</u> <input style="width: 60%;" type="text"/></p> <p><u>Website</u> <input style="width: 70%;" type="text"/></p>	<p><u>Email</u> <input style="width: 90%;" type="text"/></p> <p><u>Contact Name</u> <input style="width: 90%;" type="text"/></p>
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Close Form
Main Menu
Close DB

Click the 'Save' icon to save all your adds/updates. 

## Entering/Maintaining Contract Tracking Information

Now its time to create your contract tracker within the Quik-Biz Contract Management System.

On this screen (see below), you will add/update the contract information you wish to track.

All fields on the Contract Management screen are optional. You can setup your contract trackers based on your specific business needs.

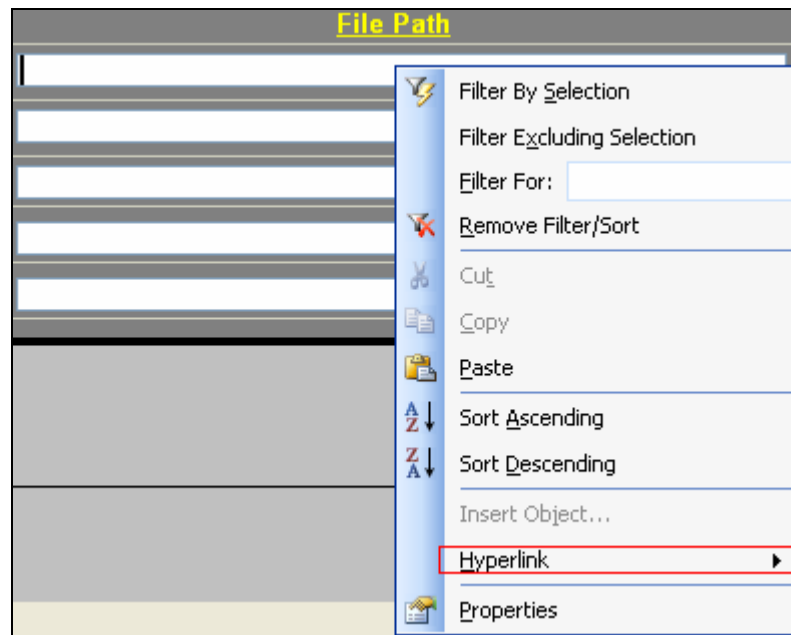
Contract Management			
Contract Name	<input type="text"/>	Requested By	<input type="text"/>
Supplier	<input type="text"/>	Execution Date	<input type="text"/>
Group	<input type="text"/>	Effective Date	<input type="text"/>
Contract Type	<input type="text"/>	Term Date	<input type="text"/>
Purpose	<input type="text"/>	Review Date	<input type="text"/>
Status	<input type="text"/>		

	File Description	File Path	Date	Attached By
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

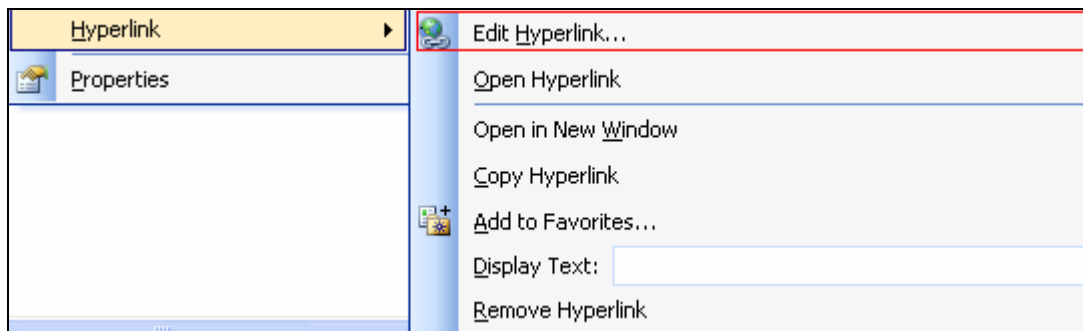
The bottom section of the Contract Management screen allows you to attached files to the contract tracker. This will allow you to easily find all related documents for your specific contract or agreement. The system allows you to attach up to 5 documents per contract tracker.

Here is how you attach a document.

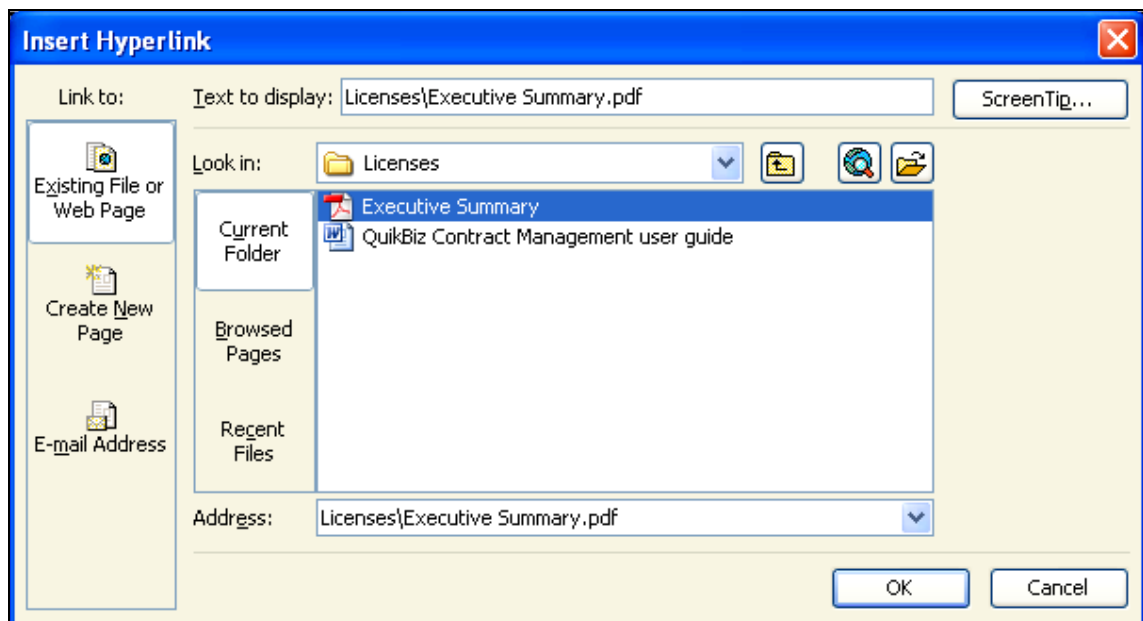
1. Select the File Path field you want the document to be attached to and click your Right mouse button. This will bring up a menu for you. Select the 'Hyperlink' menu item.



2. On the sub-menu, select the 'Edit Hyperlink' submenu item



3. On the 'Insert Hyperlink' screen, select the file you wish to attach and click 'OK'.





- The file is then attached to the contract tracker and can be referenced at anytime by clicking the hyperlink.



Once you have completed entering all your contract tracker information, click the 'Save'

icon  to save.

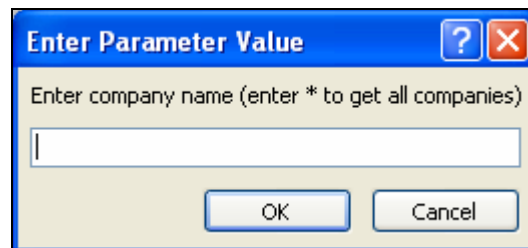
## Reports

The Quik-Biz Contract Management System comes delivered with the following reports.

Transaction Reports
Supplier Contracts
Contracts by Group
Contracts by Type
Contracts by Review Date
Contract Attachments
Contracts by Status

Configuration Reports
Submitter
Contract Statuses
Groups
Contract Types

All the transaction reports that we deliver will allow you to enter your own reporting parameters (see example below).



In addition, you can also use wild-card parameters that will allow you greater flexibility in reporting. The following table identifies wild-cards that you can use with the transactional reports. Use these wild-cards in the 'Enter Parameter Values' prompt when running the report.

Character	Description	Example
*	Matches any number of characters. You can use the asterisk anywhere in a character string.	<b>wh*</b> finds what, white, and why, but not awhile or watch.
?	Matches any single alphabetic character.	<b>B?ll</b> finds ball, bell, and bill
[ ]	Matches any single character within the brackets.	<b>B[ae]ll</b> finds ball and bell but not bill
!	Matches any character not in the brackets.	<b>b![ae]ll</b> finds bill and bull but not ball or bell
-	Matches any one of a range of characters. You must specify the range in ascending order (A to Z, not Z to A).	<b>b[a-c]d</b> finds bad, bbd, and bcd
#	Matches any single numeric character.	<b>1#3</b> finds 103, 113, 123

## Support

Any questions or comments that you have can be directed to the customer service department at TPS of Illinois, Incorporated. We can assist with ways to enhance or secure your specific Quik-Biz Contract Management System.

Our email address is [cust\\_service@tps-of-il.com](mailto:cust_service@tps-of-il.com)

Or

Visit our website at [www.tps-of-il.com](http://www.tps-of-il.com)