Contract Duration Functionality

# Purpose:

This document explains these fields and how they interact:

* Work Start Date
* Work End Date
* Manually Set Work End Date (Checkbox)
* Contract Est. in Months
* Contract Est. in Days
* Contract Duration in Months (calculated field)

# Procedures

1. User enters **Work Start Date**
2. User either:
   1. Enters **Contract Est. Days** and/or **Contract Est. Months** *or*
   2. Clicks **Manually Set Work End Date** then enters **Work End date**
3. User clicks save button, which causes Salesforce to:
   1. Calculate **Contract Duration in Months** field
   2. Calculate **Work end date** if user takes path ‘a’ above

Points for users

* You can report on either Word End Date or Duration, but reporting on Contract Est. Months and Days isn’t a good idea since they are only for input and do not get calculated if the user chooses to set the end date
* How to choose which way to go:
  + If the RFP has a specific completion date, choose to manually enter the date
  + If the RFP refers to a term, such as a six-month period, enter Contract months and/or days
* The advantage of entering duration rather than end date is that as the start date moves, the end date will move with it; if the “Manually Set Work End Date” box is checked, the end date will not move with the start date and the contract duration number will get smaller and smaller

# Notes

The **Contract Est. Month** and **Contract Est. Days** fields work together to calculation Contraction Duration. Therefore, users should enter the number of days in the Days field if the project duration is less than one month. If the duration is more than one month, enter months only or a combination of months and days. Examples:

|  |  |  |
| --- | --- | --- |
| If project duration is | Enter in Contract Est. Months field | Enter in Contract Est. Days field |
| Three weeks | Leave blank | 21 |
| Six weeks | 1 | 14 |
| Three years | 36 | Leave blank |