### Contract Processing Steps

For this format:

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1. Customer creation
   1. If customer does not already exist, create one
      1. Use Bill To section for address info and billing email
      2. If city, state, or zip are not included, can ignore
2. Processing
   1. Each line item will be a rev schedule
      1. Use description info in the contract as the item name
      2. Use the Item ID info as the item description
      3. Total price will be the total price
      4. Qty will be quantity
      5. For service start date, use this [google sheet](https://docs.google.com/spreadsheets/d/17g_fYF-njTRq46_Pocjlz7VdHQ_Mh8elmVuaJevtcDo/edit?gid=0#gid=0)
         1. ([loom instructions](https://www.loom.com/share/18a75f39ea584e76a513955c216f29a8?sid=dac80da6-2974-4b42-bf0f-3f7e986db05b) for how to use)
         2. Look at the inv<https://www.loom.com/share/18a75f39ea584e76a513955c216f29a8?sid=dac80da6-2974-4b42-bf0f-3f7e986db05b>oice number in the file name. This will be in brackets
         3. Would be DIV-001 here
         4. Find the corresponding row in column A of the sheet
         5. Look at what quarter realized is for the invoice number and then look at the yellow table at the top to find the exact date
         6. For example, if quarter realized is 2024 Q2, the service start date would be April 1st, 2024
         7. If more than one for the same invoice number, match up the date in the sheet with dates on the contract to locate the correct one
      6. For total months of service, put 3
      7. For billing start date, use the date in the top left of the contract
      8. Use terms listed in top right of contract for net payment terms
      9. Frequency will be NONE
   2. Any sales tax will be its own revenue schedule (ignore if no tax)
      1. Duplicate any line item revenue schedule in garage
      2. Delete the description and change item name to tax
      3. Change total price to the tax amount
      4. Make sure that the total in garage matches the contract total
   3. Any shipping & handling will be its own revenue schedule (ignore if none)
      1. Follow the same instructions as sales tax above but change item name to “Shipping & Handling”