OPAS 'Generate Contract' Function

This function will create any number of artist contracts directly from the **Dates** area of OPAS. These contracts are based upon any number of pre-existing contracts or templates that you create.

Create Contract Templates (Do this step one time only)

The contract function will create contracts based upon any pre-existing contract in OPAS (see 'Questions/Answers' at the end of this document for more information). It is advisable, however, to create dedicated contract **Templates** as they can be easily managed, grouped and found in the database. You can have as many Templates as you need – you may want a template for each major type of contract or concert your organization produces. For example:

Classical Contract – Soloist Outdoor Concert – Soloist Presentation Contract
Classical Contract – Guest Conductor Pops Contract – Soloist Etc.

Create a New Contract Template

Open the **Contracts** area and click the **New** icon at the lower right of the screen. Create a contract with these attributes:

1. Project - Administration or another generic non-performance Project (you can even create a separate Project for these contract Templates if you like). When the contract function runs, it will dynamically replace this with the proper Project.
2. **Title** - Any descriptive title with the word "Template" in it so you won't ever confuse this with an actual artist contract
3. **Code** – TMP or TEMP
4. Artist – Ideally this will be a Staff member or your own orchestra; any e which will help you not confuse this with a real contract. The contract function will replace this with the proper Artist
5. Group / Status / Job (optional) – Fill these in as used by your organization.

Leave all other fields blank as the contract function will dynamically fill them in

Fill in the information on the other Contract

Then move on to the **other screens** and fill them in as they typically appear in your contracts. There is no absolute right or wrong way to do this – let your guide be the information you typically collect for contracts, and the information that appears when you print contract documents from OPAS. What is defined here is what a contract will look like when it is auto-generated by the system; you can always make changes after it's been generated.
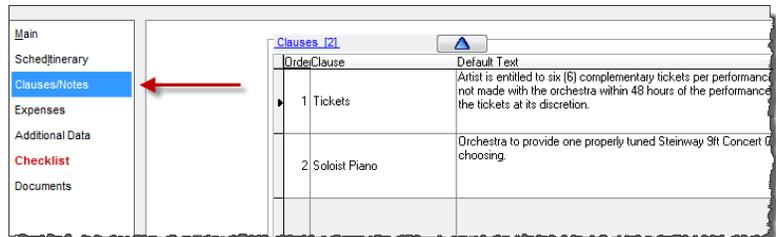
screens

Fill in each screen in the **Contracts** area, clicking the **Save** icon in the lower right corner of each screen as you go. Suggestions are shown here:

Fill in the **Sched/Itinerary** screen with the items such as arrival, hotel stay, departure, conductor meetings, receptions, ground transportation and other items that find their way in to each printed Artist Itinerary.
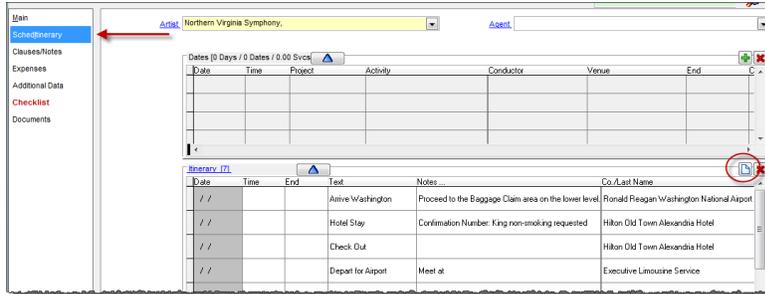

Click the **Add** icon at the top right of the grid to create an entry. Leave each Date and Time **blank**. After the contract function runs, the actual dates / times for these items can be added to the artist's schedule.

The **Clauses/Notes** screen can contain the conditions that are typically part of each contract, but not part of the contract boilerplate. For example, travel, exclusivity, ticket, piano and other clauses.

Click the green **Add New** icon at the top right of the grid to assign pre-defined contract clauses and/or type into the Note field at the bottom.

On the **Expenses** screen, click the **Add** icon at the top right of the **Expenses** grid and create at least one line item as shown here:
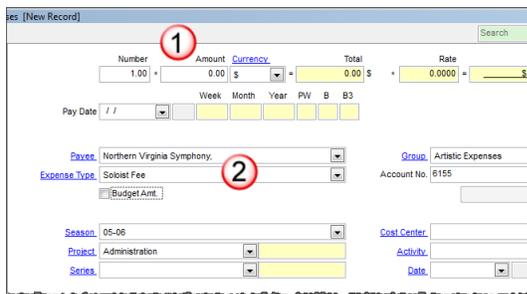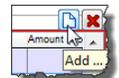
1. **Amount** – leave this blank (zero) as you will fill this in after the function has run
2. Expense Type – this should be whatever expense type is associated with the primary fee for this type of contract. If you are creating a soloist contract template, for example, this will be "Soloist Fee".

Leave all other fields blank as the contract function will fill them in

If you usually include other expenses in a contract such as travel or hotel, repeat this step to create those in the template as well. The amount will be 'zero' and only the Expense Type will change.
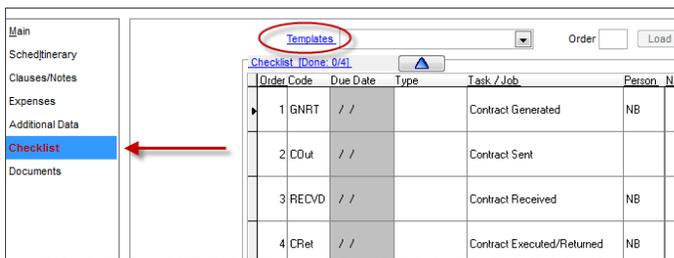
If the **Checklist** screen is used to manage a contract log, fill the grid with the appropriate steps in processing a contract. This can often be quickly done by assigning the appropriate Checklist **template**.

The **Documents** screen will most likely be left blank as you won't link documents to a contract until after it has been generated by the function in the **Dates** area (see below).

This process can be repeated for other types of contracts until you have a set of contract templates that conform to the majority of contracts you print from OPAS. Use 'New + Copy' icon in the lower right corner of the Main Screen to quickly produce other Template contracts based upon your first template.

Use the "Create Contracts" Function

**Select the Concerts for which you wish to create Contracts**

In the **Dates** area of OPAS, filter for any number or combination of activities, up to and including a full season.

You can also select a subset of your season, as in the example shown below. Contracts can be generated for all Masterwork concerts in the season, or all Pops events, etc..

P.W	Wee	Date	Start	End	Status	Project	Event Type	Venue	Conductor
6	We	10/21/2015	10:00 AM	12:30 PM		MasterWorks 2	Rehearsal	Memorial Auditorium, Arlington	Wilkins, Thor
6	Th	10/22/2015	10:00 AM	12:30 PM		MasterWorks 2	Rehearsal	Memorial Auditorium, Arlington	Wilkins, Thor
6	Fr	10/23/2015	03:00 PM	04:30 PM		MasterWorks 2	Conductor / Soloist Meetin	Rehearsal Studio A	
6	Fr	10/23/2015	07:00 PM	09:30 PM		MasterWorks 2	Rehearsal	Memorial Auditorium, Arlington	Wilkins, Thor
6	Sa	10/24/2015	12:00 PM	02:30 PM		MasterWorks 2	Dress Rehearsal	Memorial Auditorium, Arlington	Wilkins, Thor
6	Sa	10/24/2015	08:00 PM	10:00 PM		MasterWorks 2	Concert	Memorial Auditorium, Arlington	Wilkins, Thor
6	Su	10/25/2015	03:00 PM	05:00 PM		MasterWorks 2	Concert	Memorial Auditorium, Arlington	Wilkins, Thor
9	Tu	11/10/2015	10:00 AM	12:30 PM		MasterWorks 3	Rehearsal	Memorial Auditorium, Arlington	Falletta, JoAn

**Click the Function Icon and choose 'Create Contract'**

Click the **Function** icon in the upper left-hand corner of the main OPAS screen.
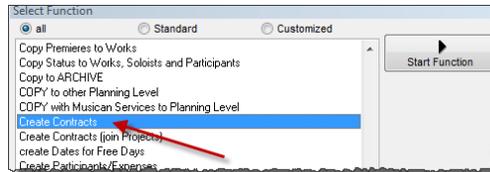
From the resulting list of data functions, select **Create Contracts** and the click the large **Start Function** button.

OPAS will analyze the activities showing in the **List** pane, and display the following dialog:

The left side of the dialog shows *each Conductor and Soloist* assigned to the activities showing in the **List** pane. The right side displays the artists for whom contracts will be generated, and the Template to be used.
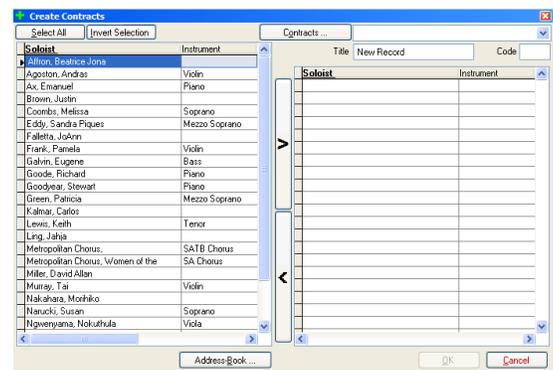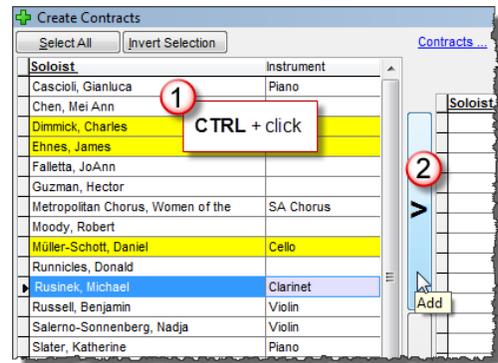
**Select the Artists and Template**
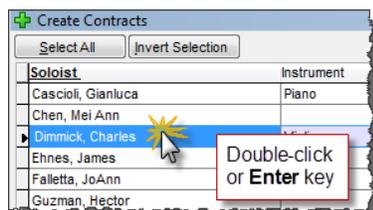
Select each artist for whom a contract should be created by **double-clicking** their name to move the person to the right side of the dialog. Select as many artists as you want (one at a time) using this method.

Many artists can be selected at one time by holding down the **CTRL** key on your keyboard and clicking (selecting) those artists for whom you want to create contracts. As each artist is selected he/she will be highlighted in Yellow. If you choose somebody by mistake, just click the name again to un-select them (remember to keep the CTRL key pressed down). With the artists selected, click the large **Add** button.


With all artists moved to the right-hand side of the dialog, **click the** Contract **drop-down** to select the Template you wish to use.
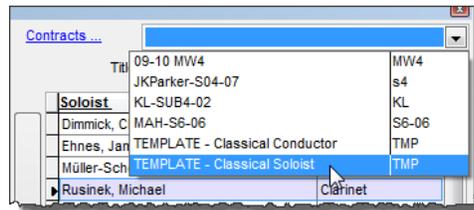
The drop-down may actually display other contracts in addition to your templates (see 'Questions/Answers' section below).

Make any other adjustments and click OK

In the upper right-hand corner of the function screen you can type a **Title** and/or **Code** that will be put on each contract. These fields can also be left blank.
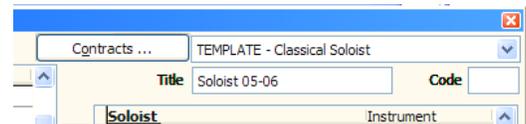
Click the green **OK** button at the bottom of this function window. OPAS will confirm the number of contracts to be created. When you click **Yes** at the prompt shown at left, OPAS will create a separate artist contract for each of the artists you selected (those on the right side of the screen).

When the function is finished, it will return to the Function window. At this point select other artists or conductors and re-run the function, or close it if you are finished.

Fill in the Contract specifics

When the OPAS **Contracts** area is next opened, each of the contracts you created will be there.

The function will have automatically put into place the Project, Season, Instrument, Agent and all Rehearsals / Concerts to which the artist was assigned in the **Dates** area.
To finalize the contract, simply:

- Add or remove any rehearsals or concerts that should / should not be part of the contract
- Visit the **Expenses** screen and replace the $0.00 that will have been put in place from the Template with the actual artist fee (and other expenses)
- As dates for your **Itinerary** are set, put those into place
- Fill in the actual dates for the contract processing on the **Checklist** screen

You can of course also remove or change any information on any of the screens.

Questions / Answers / Suggestions

Why didn't the Artist's Agent automatically fill in?

To make sure the Agent automatically fills in on the Contract **Main** screen, make sure that the Agent is properly linked to the Artist in the **Address Book** (link from the Artist's address book record).

The function will link whatever Agent is flagged as the 'Main' agent. If there is no Agent flagged as 'Main' then the function uses whatever Agent is set to Order Number 1.

Can I run this for just one concert?

Yes, the function will work on a single concert – in this way you can quickly create all the contracts for a big concert that may have many vocal soloists and chorus

Will the function create duplicates?

Yes! If you've already created a contract for a soloist or conductor, the function will create a separate contract for that same project and season. It will not in any way affect any existing contracts.