

# CONTRACT

# **INTRODUCTION TO CONTRACTS**

A Contract is a legally binding agreement between two or more parties involving the transfer of goods and / or services for a fee payable at times agreed by both parties.

Contracts in BPO give you the ability to manage your customer billing. You can link the following to a contract:

- 1 or more items (machines or locations)
- 1 or more accessories
- Various Fee Charges, e.g. Service / Rental
- Meter Charges (linked to machines) Minimum Billing and Unit Charges
- Inclusions (parts, services and / or crafts that are included in the contract package and will not be billed)
- Meter reading contact persons
- Notes and digital contract documentation

Unless the contract type has been set to Exclude from Billing (which is only valid for <u>Short Term contracts</u>), contracts will be made part of the month end billing run, depending on whether:

- Billing Start Dates are correctly set for Fees and / or Meters.
- Meter readings have been captured or set to prior reading if meters are billed.
- The contract is not suspended.

Contracts need to be <u>Released</u> and <u>Approved</u> in order to be **Active**. An Active contract is available for processing, such as being included in contract billing runs, can have service centre calls raised against it, an so forth.



If certain amendments are made on a contract, it will move back to **Released** status and an email will be sent to all users who have the rights to **authorise** a contract. This will notify them to check and re-approve the amended contract.

The following amendments, to any of the following details, will trigger the contract to be moved back into the **Released** status:

- Contract Type
- Customer
- Aggregate Billing flag
- If any contract *item* is added or removed
- If any contract *item fee* is added or removed
- Change of Billing Customer on a fee or meter

And the following Contract **Item Fee** amendments:

- Amount
- Start Date
- End Date
- Escalation %
- Account Code
- COS Account Code
- Invoice Description
- Billing Period
- Billing Cycle
- Finance Party
- Finance Amount

Note: Zero value fees can be added to contracts with a Finance Amount, in order to process Back to Back transactions where the client is not billed.

To set up a Contract, you will need the following:



- A Customer
- A Location or Machine (asset). The asset can be either a company owned Internal Asset (machine for rental), or a Customer-owned Asset.
- **Meters** linked to the machine these are required for meter billing.

# THE CONTRACT LISTING SCREEN

#### Ribbon Select Contract > Contracts



The *Contract Listing* screen will be displayed.

#### Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If *All Sites* displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the *Active* status, listing all the *Act-ive* contracts for the selected site.



ф т				(	ontract Listin	ig - BPO: Versi	on 2.5.0.14 -	Example Com	pany							- 2	x
Home Equ	ipment / I	ocations Con	tract Finar	nce / HR Inventory Maintenance / Projects	Manufacturin	g Procurem	ent Sales	Service	Reporting	Utilities						- 5	P X
		Save Layout	Hold	Release For Approval		Durban	•	Find Costal No.		📾 💼							
		Workspaces	<ul> <li>Sus</li> </ul>	cend 🚜 Remove From Approve Cit		Active	-	Find Senai No.									
Add Edit Delete	View	🐐 Save Filter	Rele	ase 🏴 Approve Contract 🚳 Decline Clos	ure Close Contract	Refrest	1	Find Contract	Print	Export Report	5						
Processing		Format		Status Processing			Current		Print	Repo							$\sim$
Links	7																
	P	a coulin meauer	CurtomerC	Customerblame	CustomerD	ContractTune	ContractTy	Location	OrderNo	StartOate	EndDate	Department	Reriod	PeriodTune	BillingCurde	BillingRerind	Billio
Functions						RD:	ID:			=	=	AD:	=	ill:	III IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	=	-
Tunctions		00000009	DER001	Derton / Technologies	-	CPC	Cost Per Co.	Durban Area	-	07/05/2014	07/05/2019	Sales Depar	6	0 Months	Months		3
Notes		00000016	TIA001	Titan Group		CPC	Cost Per Co	Main		13/06/2014	13/06/2019	Sales Depar	6	0 Months	Months		4
	0	00000018	SAM001	Samanthas Diner		CPC	Cost Per Co	Main		09/07/2014	09/07/2019	Sales Depar	6	0 Months	Months		5
	0	00000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Main		28/07/2014	28/07/2019	Sales Depar	6	0 Months	Bi-annual		6
Documents	P	C0000001	DAN002	Dancing Shoes		PRE	Prepaid Con	Kloof	test	23/03/2016	23/03/2021	Sales Depar	6	0 Months	Months		1
	0	00000031	YES001	Young Electric		CPC	Cost Per Co	Hilcrest		24/03/2016	24/03/2021	Sales Depar	6	0 Months	Months		1
		00000041	PAN001	Panda Copiers		CPC	Cost Per Co	Main		05/07/2016	05/07/2021	Sales Depar	6	0 Months	Months		5
Hold History	0	00000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Main		07/09/2016	07/09/2022	Sales Depar	6	0 Months	Months		7
	C	00000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar	6	0 Months	Quarterly		5
	0	00000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con	Durban Area		29/05/2017	29/05/2022	Sales Depar	6	0 Months	Months		3
Sumand Mistory	0	00000054	APP0001	Apple Juice Inc		CPC	Cost Per Co	Durban Area		03/08/2017	03/08/2022		6	0 Months	Months		0
Susperio History	0	00000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar	6	0 Months	Months		2
	C	00000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area		29/05/2018	29/05/2023	Sales Depar	6	0 Months	Months		0
	0	00000074	DER001	Derton / Technologies		CPC	Cost Per Co	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar	6	0 Months	Months		6
	C	00000077	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	6	0 Months	Months		4
	C	00000078	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	6	0 Months	Months		4
Processing	C	0000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Durban Cen	1234	06/05/2017	06/05/2020		6	0 Months	Months		2
Invoices	0	0000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area		10/09/2019	10/09/2024	Sales Depar	6	0 Months	Months		7
a manual a	C	00000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	6	0 Months	Months		4
	C	0000083	WES001	Westwood Dynamic		CPC	Cost Per Co	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar	6	0 Months	Months		8
Credt Notes	4 0																Þ
Open Windows *												User :	BiancaD 21/	/10/2022 Ven	sion : 2.5.0.14	Example Cor	mpany
	_																

- Click on the drop-down arrow in the *status* field to view other contract states:
  - New: Newly raised contract, to be released for approval
  - Released: New contract released for approval, to be approved
  - Active: An approved contract becomes active
  - Hold: Placing a contract on hold will allow month end billing, but not allow calls
  - Deleted: Contract has been closed and deleted
  - Closed: Contract has been closed
  - Suspend: Suspending a contract will allow calls, but not month end billing
  - **End of Contract:** A contract can be closed or re-activated from this status.
  - View more details on End of Contract Processing.
- *Scroll down* in this status menu to view all the different states.



ф т					C	ontract Listin	ng - Bl	PO: Versi	ion 2.5.1.4 - E	xample Comp	any								- 2	x
Home Equi	ment	/Locations Con	itract Finan	ce / HR Inventory Maintenance	/ Projects	Manufacturing	9	Procurem	ent Sales	Service	Reporti	ng Utilities							- 8	×
		Save Layou	t 🎼 Hold	all Release For Approval 👝	Annual Class		D	lurban	• 😄	Find Carial No.			<b>a</b>							
		Workspaces	🔹 😽 Susp	end 🚜 Remove From Approval	Approve close		A	ctive	-	Find Schol No.										
Add Edit Delete	View	🐐 Save Filter	Rele	ase 🕨 Approve Contract 🚳	Decline Closur	e Close Contract	s	itatus	A StatusDesc		Prin	t Export R	eports							
Processing		/ Format		Status Processing			N		New			Print Re	po 4							$\sim$
Links 4							A		Active											
Enter text to search		ContractNo	CustomerC	CustomerName		CustomerD	Co P		Suspend		rderN	o StartDat	e EndDa	ite	Department	Period	PeriodType.	BilingCyde	BilingPeriod	Bilin
Functions	٩	-O:	(0)	(D)		0	•0 9		Closed		D:	-	-		-0:	-	(D)	(0)	-	-
		CO0000041	PAN001	Panda Copiers			OP :	x	Deleted			05/07/2	16 05/07	/2021	Sales Depar		60 Months	Months		5
Notes		CO0000043	HOP001	Hope Works (Pty) Ltd			or		Cost Per Co	Main		01/08/20	16 07/09	/2021	Sales Depar		60 Months	Quarterly		5
		CO000072	HOP001	Hope Works (Pty) Ltd			CPC		Cost Per Co	Durban Area	1234	07/03/2	18 07/03	/2023	Sales Depar		60 Months	Months		2
		CO000074	DER001	Derton / Technologies			CPC		Cost Per Co	Durban Area	1234	15/06/20	18 15/06	2023	Sales Depar		60 Months	Months		6
Documents		CO000077	PIN0001	Pink Shoes			CPC		Cost Per Co	Durban Area		18/06/20	18 18/06	/2023	Sales Depar		60 Months	Months		4
		CO000078	PIN0001	Pink Shoes			CPC		Cost Per Co	Durban Area		18/06/20	18 18/06	2023	Sales Depar		60 Months	Months		4
		CO000080	OFF001	Office Supplies Unlimited			CPC		Cost Per Co	Durban Cen	1234	06/05/20	06/05	/2020			60 Months	Months		2
Hold History		CO000079	HOP001	Hope Works (Pty) Ltd			CPC		Cost Per Co	Durban Area		18/06/20	18 18/06	2023	Sales Depar		60 Months	Months		4
		CO000031	YES001	Young Electric			CPC		Cost Per Co	Hilcrest		24/03/20	16 24/03	/2021	Sales Depar		60 Months	Months		1
		CO0000019	OFF001	Office Supplies Unlimited			CPC		Cost Per Co	Main		28/07/20	14 28/07	/2019	Sales Depar		60 Months	Bi-annual		6
Surpend Mistory		CO0000018	SAM001	Samanthas Diner			CPC		Cost Per Co	Durban Area		09/07/2	14 09/07	/2019	Sales Depar		60 Months	Months		5
Susperior instary		CO000016	TIA001	Titan Group			CPC		Cost Per Co	Main		13/06/20	14 13/06	/2019	Sales Depar		60 Months	Months		4
Processing																				
Involcer																				
invoices																				
A strategy and																				
Creat Notes																				
	4	(									_									÷
Open Windows 🕶															Use	r : Bianca	27/01/2023 V	ersion : 2.5.1.4	Example Com	ipany

# **CONTRACT RIBBON ACTION BUTTONS**

Contract ribbon **action** buttons will be available (bold) or unavailable (greyed out) depending on the status selection. The following functionality is available from this screen:

#### **MAINTAIN BUTTONS**

• <u>Add</u>, <u>Edit</u>, <u>Delete</u> or <u>View</u>, a Contract.



4 v				Contract Listi	ng - BPO: Versi	ion 2.5.1.4 - E	xample Comp	pany							- 2	x
Home Equi	pment / Locations	Contract Fina	nce / HR Inventory Maintenance / Projects	Manufacturin	g Procurem	ent Sales	Service	Reporting	Utilities						- 8	×
	📃 🔣 Save Lay	out 📲 Hol	d 🍕 Release For Approval 🙈 Approve Cl		Durban	• 🕫	Find Serial No.		🖦 💼							
	Workspa	ces 🔹 😽 Sus	pend 🚜 Remove From Approval		Active	•										
Add Edit Delete	View 🐐 Save Filt	er 🛛 📙 Rel	ease 🕨 Approve Contract 🛛 🚳 Dedine Clos	Close Contract	🕲 Refresh		Find Contract	Print	Export Report	s						
Processing	⊿ Format		Status Processing			Current		4 Prin	t _ Repo							$\diamond$
Links	Drag a column hear															
Enter text to search	ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department.	Period	PeriodType	BilingCyde	BilingPeriod	Bilin
Functions	T (0)	<ul> <li>••••</li> </ul>	* <b>0</b> ¢	* <b>0</b> ¢	1 <b>0</b> 1	(D)	- <b>O</b> 4	* <b>0</b> ¢	-	-	×0+	-	(D)	<ul> <li>ID</li> </ul>	-	-
	CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co	Main		05/07/2016	05/07/2021	Sales Depar	. 6	0 Months	Months		5
Notes	CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar	. 6	0 Months	Quarterly		5
	CO0000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar	. 6	0 Months	Months		2
	CO000074	DER001	Derton / Technologies		CPC	Cost Per Co	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar	. 6	0 Months	Months		6
Documents	CO000077	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	. 6	0 Months	Months		4
	CO000078	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	. 6	0 Months	Months		4
	CC0000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Durban Cen	1234	06/05/2017	06/05/2020		6	0 Months	Months		2
Hold History	CO000079	HOP001	Hope Works (Pty) Ltd		OPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	. 6	0 Months	Months		4
	CO000031	YES001	Young Electric		CPC	Cost Per Co	Hilcrest		24/03/2016	24/03/2021	Sales Depar	. 6	0 Months	Months		1
	CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Main		28/07/2014	28/07/2019	Sales Depar	. 6	0 Months	Bi-annual		6
Suspend History	CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co	Durban Area		09/07/2014	09/07/2019	Sales Depar	. 6	0 Months	Months		5
,	CO0000016	TIA001	Titan Group		CPC	Cost Per Co	Main		13/06/2014	13/06/2019	Sales Depar	. 6	0 Months	Months		4
Processing Invoices Credit Notes																
Oneo Windows #											Lies	r Banca 2	7/01/2022 Vie	crime + 2 E 1 4	Evanala Car	+
open millionits .											Use	2	104/2023 VE		chample coll	ing carly

#### **STATUS PROCESSING BUTTONS**

- Place a Contract on <u>Hold</u> and <u>Release</u> a Contract
- <u>Suspend</u> a Contract and <u>Release</u> a Contract from suspension
- <u>Release</u> a Contract *for* Approval
- <u>Remove</u> a Contract *from* Approval
- Approve a Contract
- <u>Close</u> a Contract

ф т				Contract Listi	ng - BPO: Vers	ion 2.5.1.4 - E	xample Comp	pany							- 2	x
Home Equip	ment / Locations Co	ntract Finar	nce / HR Inventory Maintenance / Projects	Manufacturin	g Procurem	ent Sales	Service	Reporting	Utilities						_ 8	×
	😑 🔣 Save Layou	it 📲 Hold	🖌 🚜 Release For Approval 🖉 America Ch		Durban	· .	Find Could Me		📾 💼							
🤟 💋 🦱 l	Workspace	s 🔻 😽 Susj	pend 🚜 Remove From Approval		Active	-	Find Sending.									
Add Edit Delete V	/iew 🐐 Save Filter	Ilà Rele	ease 🕨 Approve Contract 🚳 Decline Clos	ure Close Contract	🕲 Refrest	1	Find Contract	Print	Export Report	s						
Processing	/ Format		Status Processing		4	Current		Print	t A Repo							$\diamond$
Links #	Drag a column header															
Enter text to search P	ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department.	Period	PeriodType	BilingCyde	BilingPeriod	Bilin
Functions	▼ ±0:	<d:< th=""><th>-0:</th><th><ul> <li>ID</li> </ul></th><th>1<b>0</b>:</th><th>(D):</th><th><ul> <li>0</li> </ul></th><th>×0:</th><th>-</th><th>-</th><th>(D)</th><th>-</th><th>(D)</th><th>-O-</th><th>-</th><th>-</th></d:<>	-0:	<ul> <li>ID</li> </ul>	1 <b>0</b> :	(D):	<ul> <li>0</li> </ul>	×0:	-	-	(D)	-	(D)	-O-	-	-
	CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co	Main		05/07/2016	05/07/2021	Sales Depar.		60 Months	Months		5
Notes	CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar.		60 Months	Quarterly		5
	CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar.		60 Months	Months		2
	CO000074	DER001	Derton / Technologies		CPC	Cost Per Co	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar		60 Months	Months		6
Documents	CO0000077	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months		4
	CO000078	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months		4
	CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Durban Cen	1234	06/05/2017	06/05/2020			60 Months	Months		2
Hold History	CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months		4
	CO000031	YES001	Young Electric		CPC	Cost Per Co	Hilcrest		24/03/2016	24/03/2021	Sales Depar		60 Months	Months		1
	CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Main		28/07/2014	28/07/2019	Sales Depar		60 Months	Bi-annual		6
Suspend History	CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co	Durban Area		09/07/2014	09/07/2019	Sales Depar		60 Months	Months		5
Superioristory	CO000016	TIA001	Titan Group		CPC	Cost Per Co	Main		13/06/2014	13/06/2019	Sales Depar		60 Months	Months		4
Processing																
Invoices																
Credit Notes																
	4															÷
Open Windows 🕶											Use	er : Bianca	27/01/2023	/ersion : 2.5.1.4	Example Com	pany



#### **CURRENT BUTTONS**

- Find a Contract that is linked to a particular serial number.
- Find a Contract, no matter what Site or Status it is in.

<b>\$</b> *				Contract Listi	ng - BPO: Vers	ion 2.5.1.4 - I	Example Comp	any							- 2	x
Home Equip	ment / Locations	Contract Finar	nce / HR Inventory Maintenance	Projects Manufacturin	a Procuren	ent Sales	Service	Reporting	Utilities						_ 8	×
Add Edit Delete V	iew Save La	yout 📲 Holo ices 🔻 🐯 Sus iter 🐻 Rele	d & Release For Approval pend & Remove From Approval case P Approve Contract	Approve Closure Decline Closure Contract	Durban Active @ Refrest		Find Serial No.	Print	Export Report	2						
Processing	Format		Status Processing			Current		a Prin	it _ Repo							~
Links #	Drag a column hea															
Enter text to search P	ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department	Period	PeriodType	BilingCycle	BilingPeriod	Bilin
Functions	•	<u>ال</u>	4 <b>0</b> ¢	4 <b>0</b> 4	10:	( <b>D</b> )	4 <b>0</b> 4	۰ <b>۵</b> :	-	-	104	-	(D)	(D)	-	-
	CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co	Main		05/07/2016	05/07/2021	Sales Depar		60 Months	Months	5	
Notes	CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar		60 Months	Quarterly	5	
	CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar		60 Months	Months	2	
	CO000074	DER001	Derton / Technologies		CPC	Cost Per Co	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar		60 Months	Months	6	
Documents	CO000077	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/05/2023	Sales Depar		60 Months	Months	4	
	CO000078	PIN0001	Pink Shoes		OPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	4	
	CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co	Durban Cen	1234	06/05/2017	06/05/2020			60 Months	Months	2	
Hold History	CO000079	HOP001	Hope Works (Pty) Ltd		OPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	4	
	CO000031	YES001	Young Electric		CPC	Cost Per Co	Hilcrest		24/03/2016	24/03/2021	Sales Depar		60 Months	Months	1	
	CO0000019	OFF001	Office Supplies Unlimited		OPC	Cost Per Co	Main		28/07/2014	28/07/2019	Sales Depar		60 Months	Bi-annual	6	
A construction of the second sec	CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co	Durban Area		09/07/2014	09/07/2019	Sales Depar		60 Months	Months	5	
Suspend History	CO0000016	TIA001	Titan Group		CPC	Cost Per Co	Main		13/06/2014	13/06/2019	Sales Depar		60 Months	Months	4	
Processing Invoices Credt Notes																
Open Windows 👻	4										Use	r : Bianca	27/01/2023 Ve	ersion : 2.5.1.4	Example Compr	) any

#### **PRINT BUTTONS**

**Export** 

1. *Export* allows you to <u>export</u> a Contract List to Microsoft Excel.

#### **REPORTS BUTTON**

Reports

- 1. *Reports* allows you to print the following Contract Reports:
  - Contract Report
  - Performance Report
  - <u>Contract Settlement</u>
  - Company Settlement
  - Machine Usage



**Print Statement** 

1. *Print Statement* allows you to <u>print and / or email</u> a Customer Statement directly from this screen.

## THE LINKS PANEL

By default, the *Links* panel is docked on the left of the screen. If you not, you can access it via the *Links* tab.

\$	v						Co	ntract Listin	ıg - BPO: Versi	on 2.5.1.4	- Example Compa	ny							_ 8	x
	Home	Equipment / Loca	ations Contract	t Finance / H	R Inventory	Maintenand	ce / Projects	Manufacturing	2 Procureme	nt Sale	es Service	Reporting	Utilities						- 6	p x
Add	Edit Delet	e View	Save Layout Workspaces 🕶	Hold	Release For Remove Fro P Approve Co	Approval entract	Approve Closu	re 🕞 Close Contract	Durban Active	•	Find Serial No. Find Contract	Print Exp	ort Reports							
	Processing		Format 4			tus Processing				Current		Print	∡ Repo							~
Unks	ag a colum	er here to group	by that column															1		1
ш.	ContractNo	CustomerC	CustomerName			CustomerD	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department.	. Period	PeriodType	. BilingCycle	BillingPeriod	BillingDay	Escalation	P Es
	100	100	1 <b>0</b> :			100	10:	<ul> <li>Image: Constraint of the second second</li></ul>	AD:	100	-	-	100	-	4 <b>0</b> 4	* <b>Q</b> :	-	-	-	10
,	CO0000041	PAN001	Panda Copiers				CPC	Cost Per Co	Main		05/07/2016	05/07/2021	Sales Depar		60 Months	Months	ŝ		25	5 Pe
	CO0000043	HOP001	Hope Works (Pty)	/) Ltd			CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar		60 Months	Quarterly			25	7 Pe
-	C00000072	HOP001	Hope Works (Pty	/) Ltd			CPC	Cost Per Co	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar		60 Months	Months	-		25	60 Pe
	CO000074	DER001	Derton / Technolo	logies			CPC	Cost Per Co	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar		60 Months	Months	6		25	6 Pe
-	CO0000077	PIN0001	Pink Shoes				CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	-		25	4 Pe
-	CO0000078	PIN0001	Pink Shoes				CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	-		25	4 Pe
-	000000000	000001	Unice Supples U	nimited			CPC	Cost Per Co	Durban Cen	1234	06/05/2017	06/05/2020	Coluci Deces		60 Months	Months			25	3 Pe
-	CO0000079	HOP001	Hope Works (Pty	/) Ltd			CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar.		60 Months	Months	-		25	4 Pe
-	00000031	TES001	Toung Electric	taburta d			CPC	Cost Per Co	Hildrest		24/03/2016	24/03/2021	Sales Depar.		60 Months	Months	1		25	1 Pe
	00000019	CAMOOR	Conce Supplies Of	nimited			CPC	Cost Per Co	Man		28/07/2014	28/07/2019	Sales Depar.		60 Months	bi-annual Maatka			25	5 Pe
-	00000015	TTA001	Titae Creup				CPC CPC	Cost Per Co.	Maio		12/05/2014	12/06/2019	Sales Depar		60 Months	Menthe	-		25	5 04
1 -	00000016	114001	Titan Group				UPC	Cost Per Co	Main		13/06/2014	13/06/2019	Sales Depar		60 Monens	Months			25	5 Pe
																				÷
Oper	Windows 🕶														User	: Bianca 27/	01/2023 Versi	on: 2.5.1.4	Example Co	mpany

- The *Links* panel will expand.
- Here you can view the *Functions* and *Processing* tiles that will direct you to further information screens linked to each contract. These tiles are available in both the *Contract Listing* screen and the *Contract Maintenance* screen. If you are navigating from the Contract Listing screen, be sure to select the correct contract *before* you click on a tile.
  - Note: You can dock this panel to make it available as you open the Contract Listing screen.



٦	¥									Contract Listin	ng - BPO: Versi	ion 2.5.1.4 - I	xample Comp	any							- 2	x
		Home	Equipme	nt / Loca	tions Con	tract Finar	ice / HR Invento	ory Mainten	ance / Projects	Manufacturin	g Procurem	ent Sales	Service	Reporting	Utilities						_ 8	×
6	A F			1 13	Save Layout	t 📲 Hold	Release F	For Approval	de Anna de		Durban	• 6	Find Casial Ma		📾 💼							
0		/ ~			Workspaces	🔹 😽 Susp	end 🚜 Remove I	From Approval	Approve Cio		Active	- <u>·</u>	Find Senai No.									
Ad	d E	Edit Deleti	: Vier	4	Save Filter	Rele	ase 🏴 Approve	Contract	Decline Close	re Close Contract	Ca Refresh	1	Find Contract	Print	Export Report	s						
		Processing			Format			Status Processi	ng			Current		Prin	t _ Repo							$\diamond$
Link	s		#																			
Ente	r text t	o search	۹.	Cont	ractNo	CustomerC	CustomerName			CustomerD	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department.	Period	PeriodType	BilingCycle	BilingPeriod	Bilin
FI	inctio	ns		T 100		<d:< th=""><th>1<b>0</b>:</th><th></th><th></th><th>&lt;0&lt;</th><th>(0)</th><th>(D)</th><th><ul> <li>0</li> </ul></th><th>×0:</th><th>-</th><th>-</th><th><ul> <li>0</li> </ul></th><th>-</th><th>(0)</th><th>(D)</th><th>-</th><th>-</th></d:<>	1 <b>0</b> :			<0<	(0)	(D)	<ul> <li>0</li> </ul>	×0:	-	-	<ul> <li>0</li> </ul>	-	(0)	(D)	-	-
			_	+ CO00	000041	PAN001	Panda Copiers				CPC	Cost Per Co	Main		05/07/2016	05/07/2021	Sales Depar	. 6	50 Months	Months		5
	Notes			C000	000043	HOP001	Hope Works (Pty) L	Ltd			CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar	. 6	50 Months	Quarterly		5
				C000	000072	HOP001	Hope Works (Pty) L	Ltd			CPC	Cost Per Co	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar.	. 6	50 Months	Months		2
			_	C000	000074	DER001	Derton / Technolog	jes			CPC	Cost Per Co	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar.	. 6	50 Months	Months		6
				C000	000077	PIN0001	Pink Shoes				CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar.	. 6	50 Months	Months		4
				C000	000078	PIN0001	Pink Shoes				CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	. 6	50 Months	Months		4
			_	C000	080000	OFF001	Office Supplies Unli	imited			CPC	Cost Per Co	Durban Cen	1234	06/05/2017	06/05/2020		6	50 Months	Months		2
	Hold Hi	story		C000	000079	HOP001	Hope Works (Pty) L	Ltd			CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar	. 6	50 Months	Months		4
				C000	000031	YES001	Young Electric				CPC	Cost Per Co	Hillcrest		24/03/2016	24/03/2021	Sales Depar	. 6	50 Months	Months		1
				C000	000019	OFF001	Office Supplies Unli	imited			CPC	Cost Per Co	Main		28/07/2014	28/07/2019	Sales Depar	. 6	50 Months	Bi-annual		6
	Susper	d History		C000	000018	SAM001	Samanthas Diner				CPC	Cost Per Co	Durban Area		09/07/2014	09/07/2019	Sales Depar	. 6	50 Months	Months		5
				C000	000016	TIA001	Titan Group				OPC	Cost Per Co	Main		13/06/2014	13/06/2019	Sales Depar	. 6	50 Months	Months		4
11																						
11																						
Р	roces	sina																				
			_																			
			_																			
			_																			
11																						
11																						
			_																			
			_	4																		- +
Ope	n Windi	ows •															Use	r : Bianca 2	7/01/2023 Ve	rsion : 2.5.1.4	Example Con	ripany

# **FUNCTIONS TILES**

Notes	The <b>Notes</b> tile will direct you to the <u>Contract Note Listing</u> for Contract No.: screen where you can <i>Add</i> and <i>View</i> Con- tract Notes.
Documents	The <b>Documents</b> tile will direct you to the <b>Document Listing</b>
	for Contract - screen, where you can <i>Add</i> , <i>View</i> and <i>Delete</i> digital documents.
Hold History	The <b>Hold History</b> tile will direct you to the Hold History for
	Contract No.: screen where you can view the <i>dates</i> and
	reasons why, a Contract was placed on Hold.
Suspend History	The <b>Suspend History</b> tile will direct you to view the <u>Sus</u> - pend History for Contract No.: screen displaying a data grid
	of the <i>dates</i> and <i>reasons why</i> the Contract was suspended.





### **PROCESSING TILES**



The Invoices tile will direct you to the <u>Invoices for Contract:</u> [] screen, where you can view, add, edit and reprint invoices.

**Documents**: The Documents tile will direct you to the <u>Docu-</u> <u>ment Listing for Contract -</u> screen, where you can *Add*, *View* and *Delete* digital documents.

BPO.MNU.112