

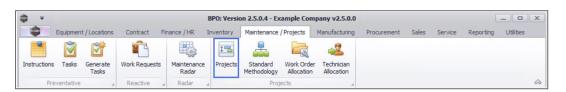
PROJECTS

PROJECTS - FOR CONTRACT

This screen displays items linked to the selected project that have been processed, but still need to be linked to a new or existing contract. The items displayed can be:

- A or B-class internal assets issued (New Deal Rental)
- A or B-class serialised stock invoiced and issued (New Deal Sale)

Ribbon Access: Maintenance / Projects > Projects



- 1. The *Project Listing* screen will be displayed.
- 2. Click on the *row* of the project that has item(s) waiting to be linked.
- 3. Click on the *For Contract* tile.



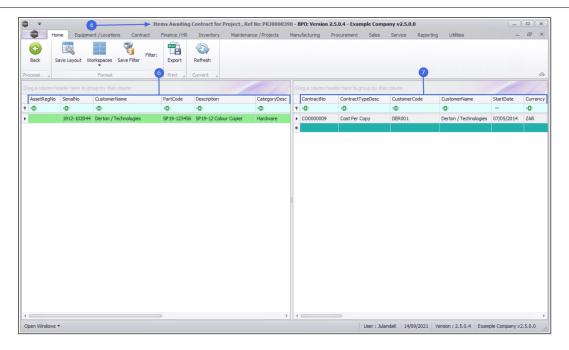
Projects - For Contract

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- 4. The *Items Awaiting Contract for Project , Ref No: [project ref number]* screen will be displayed.
- 5. This screen is divided into **2** data grids:
- 6. Data grid 1: displays all the items linked to the selected project waiting to be allocated to a contract. These items can either be *client* assets or *internal* assets. For internal assets to be displayed, a New Deal Project process has to be completed first.
- 7. Data grid 2: displays all the existing contracts for the *customer* linked to the project.

Deleted or **Closed** contracts will not display on this screen.





LINK ITEM(S) TO CONTRACT

- 8. "Select Multiple Item Lines Block" on page 4 or a single item in data grid **1**, that you wish to add to a contract.
- Click on the line separator of the selected item(s), *hold* and *drag* the contract item to an existing or new contract¹, in data grid 2.
- 10. As it is 'dropped', the *Drop Validation* message will display requesting;
 - Do you want to add these items(s) to contract no.

[contract number], for customer [Customer Name]?

11. Click on Yes.

 $^{^1\!\}mathrm{A}$ new contract line is the blank row in data grid 2 that contains an [*] in the row selector column



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- 12. The *Maintenance for Contract No.* screen will be displayed.
- 13. The contract item you have added will be listed last in the *Parts* data grid.

PART ITEMS FRAME

- 14. The *Items* frame for the part with sub grids will expand, for adding information to:
 - Item Fees
 - Item Meters
 - Item Inclusions
 - Item Contacts
- 15. Complete the **Part Item** frames as required.

For a detailed handling of this topic refer to Add a New Contract



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- 16. The *scroll bar* at the bottom indicates that further information is available. Scroll right to view all the contract item information.
- 17. You can link or edit the:
 - Location
 - Shipping Address
 - COS Account Code
 - SLA Hours
 - Travel Radius
 - Travel Charge
- Complete the Contract Info, Customer Info and Billing Info and Rental Info and Life Based Billing info.

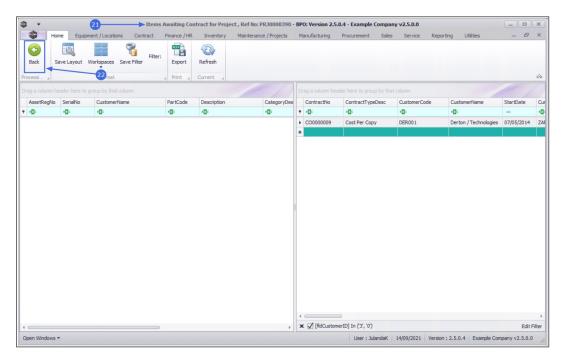
SAVE ITEM FOR CONTRACT

19. Click on *Save*.



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- 20. The item will be linked to the *existing* contract and the contract details will be *saved*.
- 21. You will return to the *Items Awaiting Contract for Project* listing screen.
- 22. Click on *Back* to return to the Project Listing screen.





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