

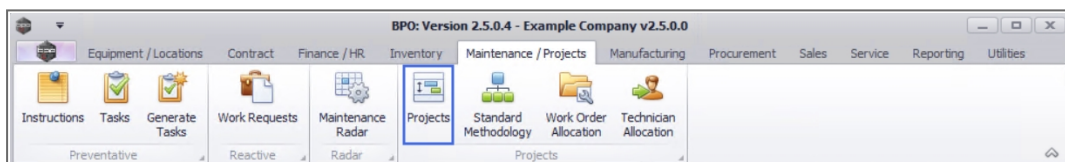
## PROJECTS

### PROJECTS – FOR CONTRACT

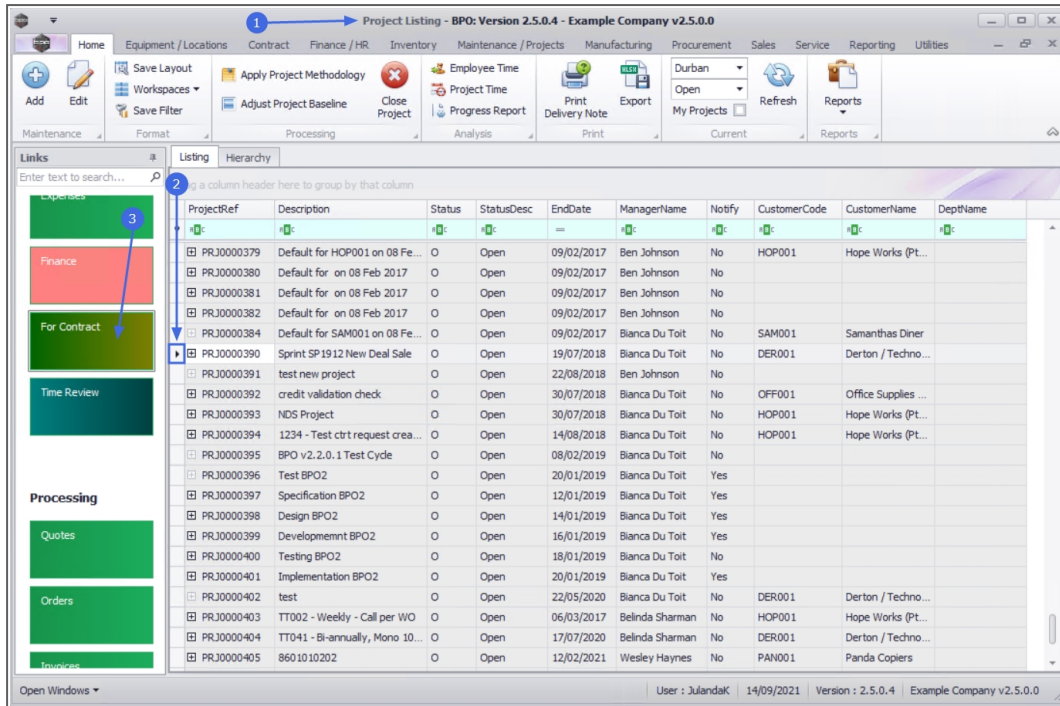
This screen displays items linked to the selected project that have been processed, but still need to be linked to a new or existing contract. The items displayed can be:

- 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.

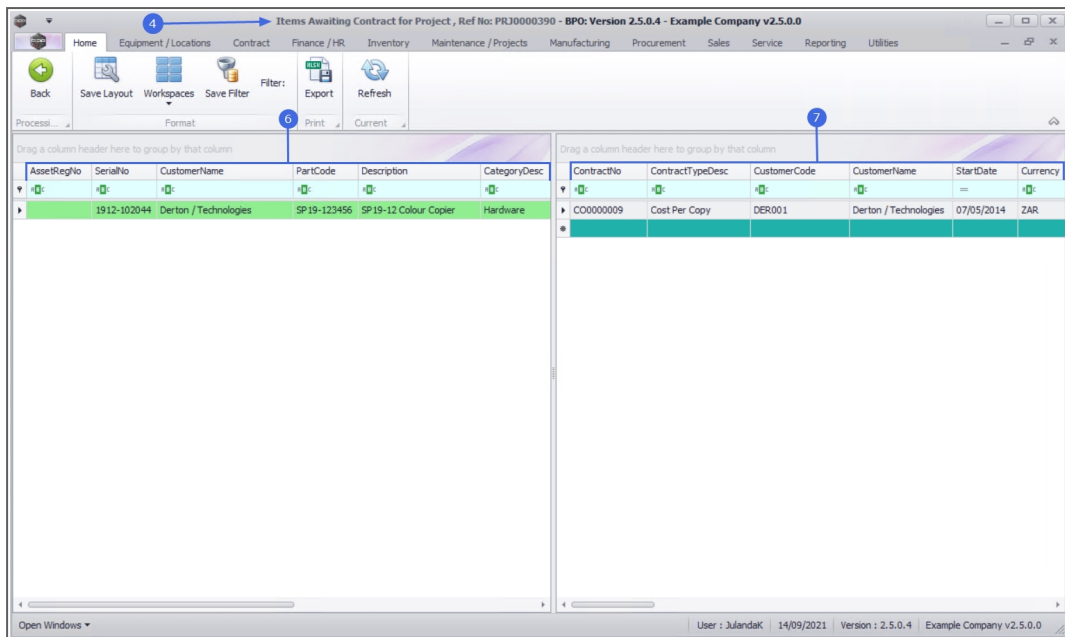


ProjectRef	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptName
PRJ0000379	Default for HOP001 on 08 Feb 2017	O	Open	09/02/2017	Ben Johnson	No	HOP001	Hope Works (Pt...	
PRJ0000380	Default for on 08 Feb 2017	O	Open	09/02/2017	Ben Johnson	No			
PRJ0000381	Default for on 08 Feb 2017	O	Open	09/02/2017	Ben Johnson	No			
PRJ0000382	Default for on 08 Feb 2017	O	Open	09/02/2017	Ben Johnson	No			
PRJ0000384	Default for SAM001 on 08 Feb 2017	O	Open	09/02/2017	Blanca Du Toit	No	SAM001	Samanthas Diner	
PRJ0000390	Sprint SP1912 New Deal Sale	O	Open	19/07/2018	Blanca Du Toit	No	DER001	Derton / Techno...	
PRJ0000391	test new project	O	Open	22/08/2018	Ben Johnson	No			
PRJ0000392	credit validation check	O	Open	30/07/2018	Blanca Du Toit	No	OFF001	Office Supplies ...	
PRJ0000393	NDS Project	O	Open	30/07/2018	Blanca Du Toit	No	HOP001	Hope Works (Pt...	
PRJ0000394	1234 - Test ctr request crea...	O	Open	14/08/2018	Blanca Du Toit	No	HOP001	Hope Works (Pt...	
PRJ0000395	BPO v2.2.0.1 Test Cycle	O	Open	08/02/2019	Blanca Du Toit	No			
PRJ0000396	Test BPO2	O	Open	20/01/2019	Blanca Du Toit	Yes			
PRJ0000397	Specification BPO2	O	Open	12/01/2019	Blanca Du Toit	Yes			
PRJ0000398	Design BPO2	O	Open	14/01/2019	Blanca Du Toit	Yes			
PRJ0000399	Development BPO2	O	Open	16/01/2019	Blanca Du Toit	Yes			
PRJ0000400	Testing BPO2	O	Open	18/01/2019	Blanca Du Toit	No			
PRJ0000401	Implementation BPO2	O	Open	20/01/2019	Blanca Du Toit	Yes			
PRJ0000402	test	O	Open	22/05/2020	Blanca Du Toit	No	DER001	Derton / Techno...	
PRJ0000403	TT002 - Weekly - Call per W/O	O	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt...	
PRJ0000404	TT041 - Bi-annually, Mono 10...	O	Open	17/07/2020	Belinda Sharman	No	DER001	Derton / Techno...	
PRJ0000405	8601010202	O	Open	12/02/2021	Wesley Haynes	No	PAN001	Panda Copiers	

- The **Items Awaiting Contract for Project , Ref No: [project ref number]** screen will be displayed.
- This screen is divided into **2** data grids:
- 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.
- Data grid 2:** displays all the existing contracts for the **customer** linked to the project.



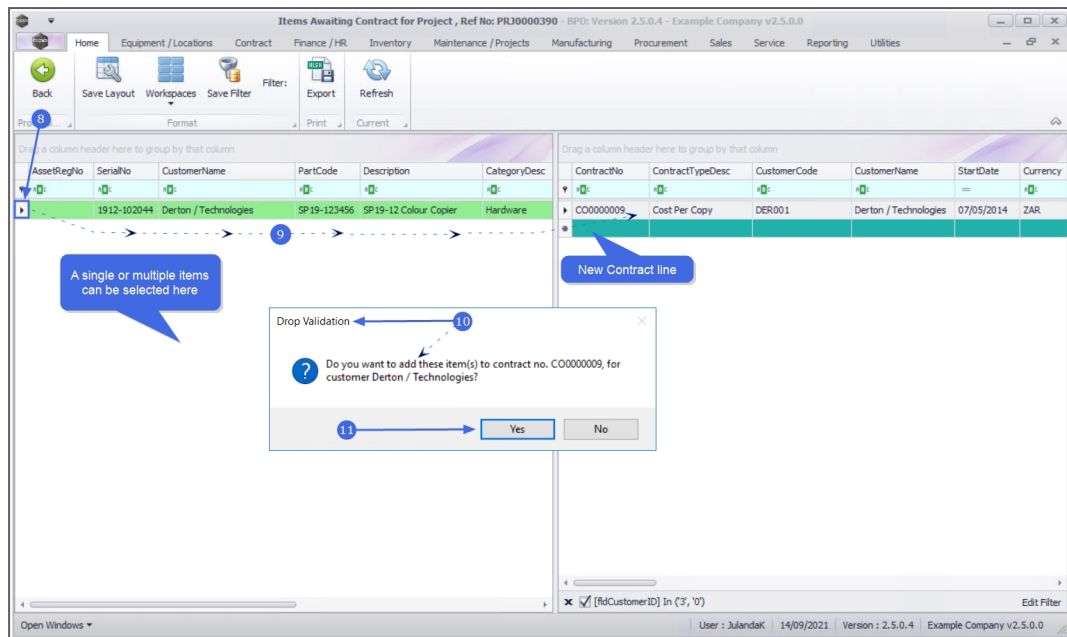
**Deleted or Closed** contracts will not display on this screen.



## 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.
9. Click on the line separator of the selected item(s), **hold** and **drag** the contract item to an existing or **new contract**<sup>1</sup>, 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**.

<sup>1</sup>A new contract line is the blank row in data grid 2 that contains an [\*] in the row selector column



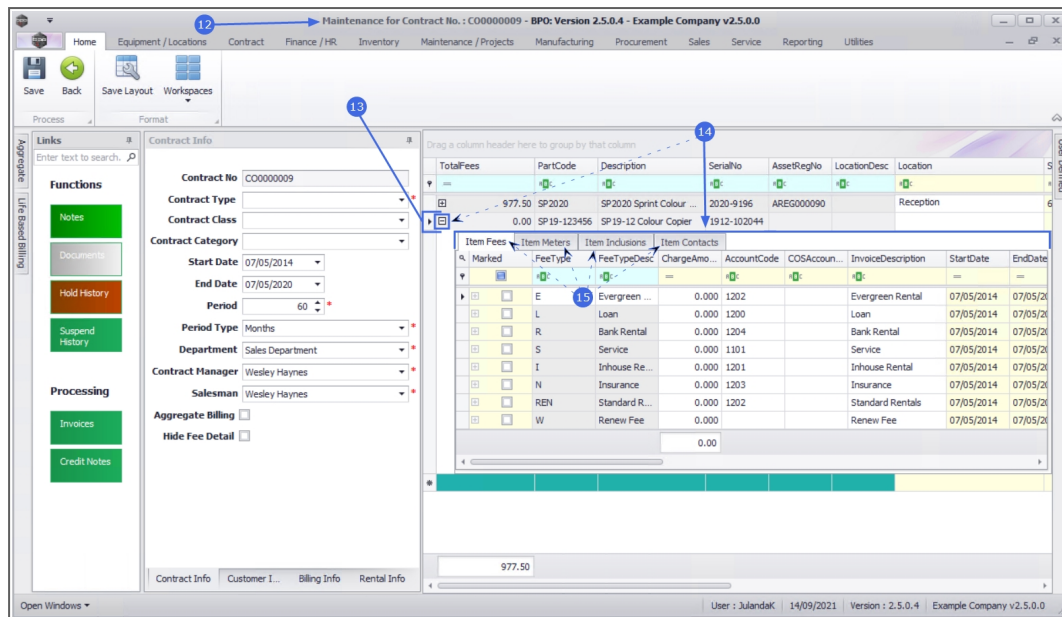
12. The **Maintenance for Contract No.** screen will be displayed.
13. The contract item you have added will be listed last in the **Parts** data grid.

## 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



16. The **scroll bar** at the bottom indicates that further information is available. Scroll right to view all the contract item information.

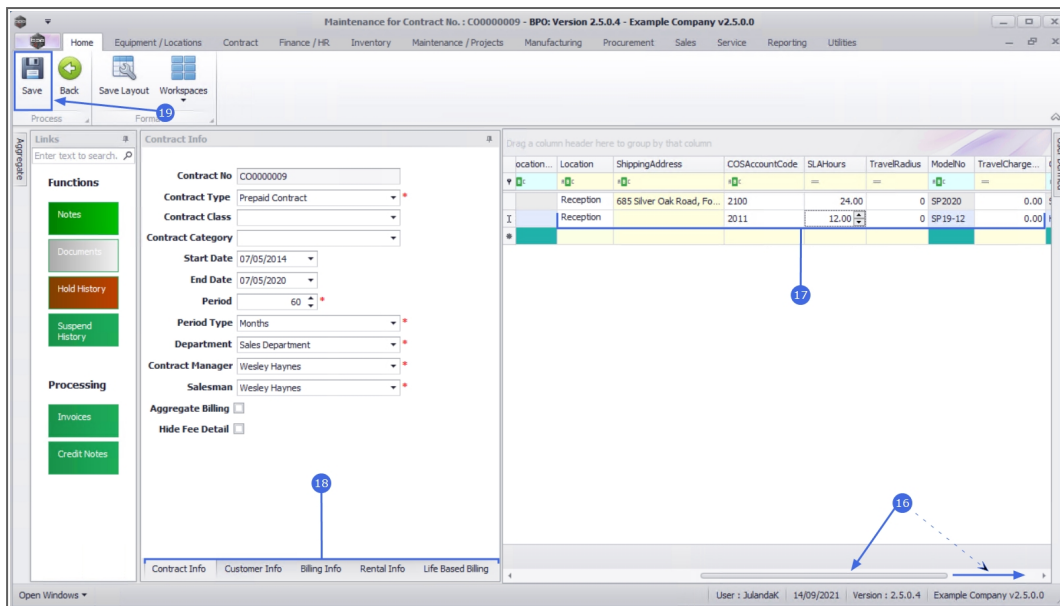
17. You can link or edit the:

- Location
- Shipping Address
- COS Account Code
- SLA Hours
- Travel Radius
- Travel Charge

18. 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**.



Contract Info

Contract No: CO0000009

Contract Type: Prepaid Contract

Contract Class:

Contract Category:

Start Date: 07/05/2014

End Date: 07/05/2020

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Wesley Haynes

Salesman: Wesley Haynes

Aggregate Billing: ☐

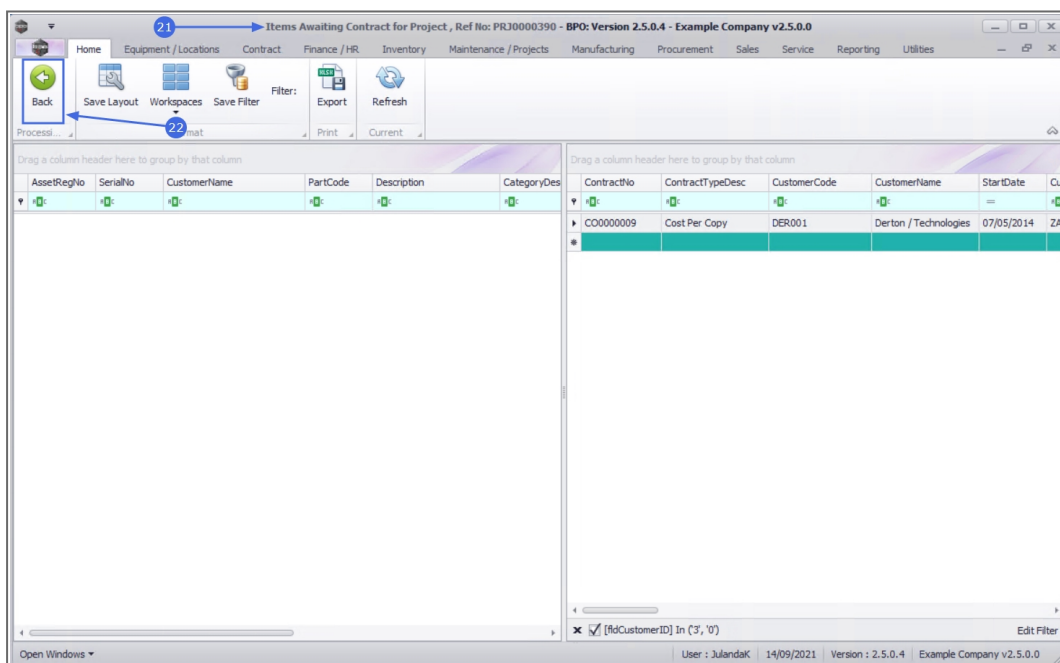
Hide Fee Detail: ☐

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	ModelNo	TravelCharge
Reception	685 Silver Oak Road, Fo...	2100	24.00	0	SP2020	0.00
Reception		2011	12.00	0	SP19-12	0.00

Contract Info Customer Info Billing Info Rental Info Life Based Billing

User : JulandaK 14/09/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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.



Items Awaiting Contract for Project, Ref No: PRJ0000390 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Contract Info

Contract No: CO0000009

Contract Type: Prepaid Contract

Contract Class:

Contract Category:

Start Date: 07/05/2014

End Date: 07/05/2020

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Wesley Haynes

Salesman: Wesley Haynes

Aggregate Billing: ☐

Hide Fee Detail: ☐

ContractNo	ContractTypeDesc	CustomerCode	CustomerName	StartDate	Current
CO0000009	Cost Per Copy	DER001	Derton / Technologies	07/05/2014	ZAF

Contract Info Customer Info Billing Info Rental Info Life Based Billing

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