

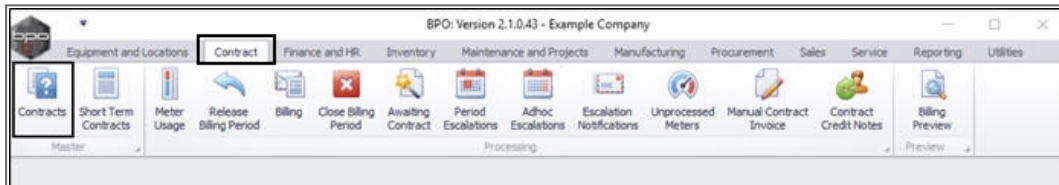
CONTRACTS

CONTRACTS - HOLD

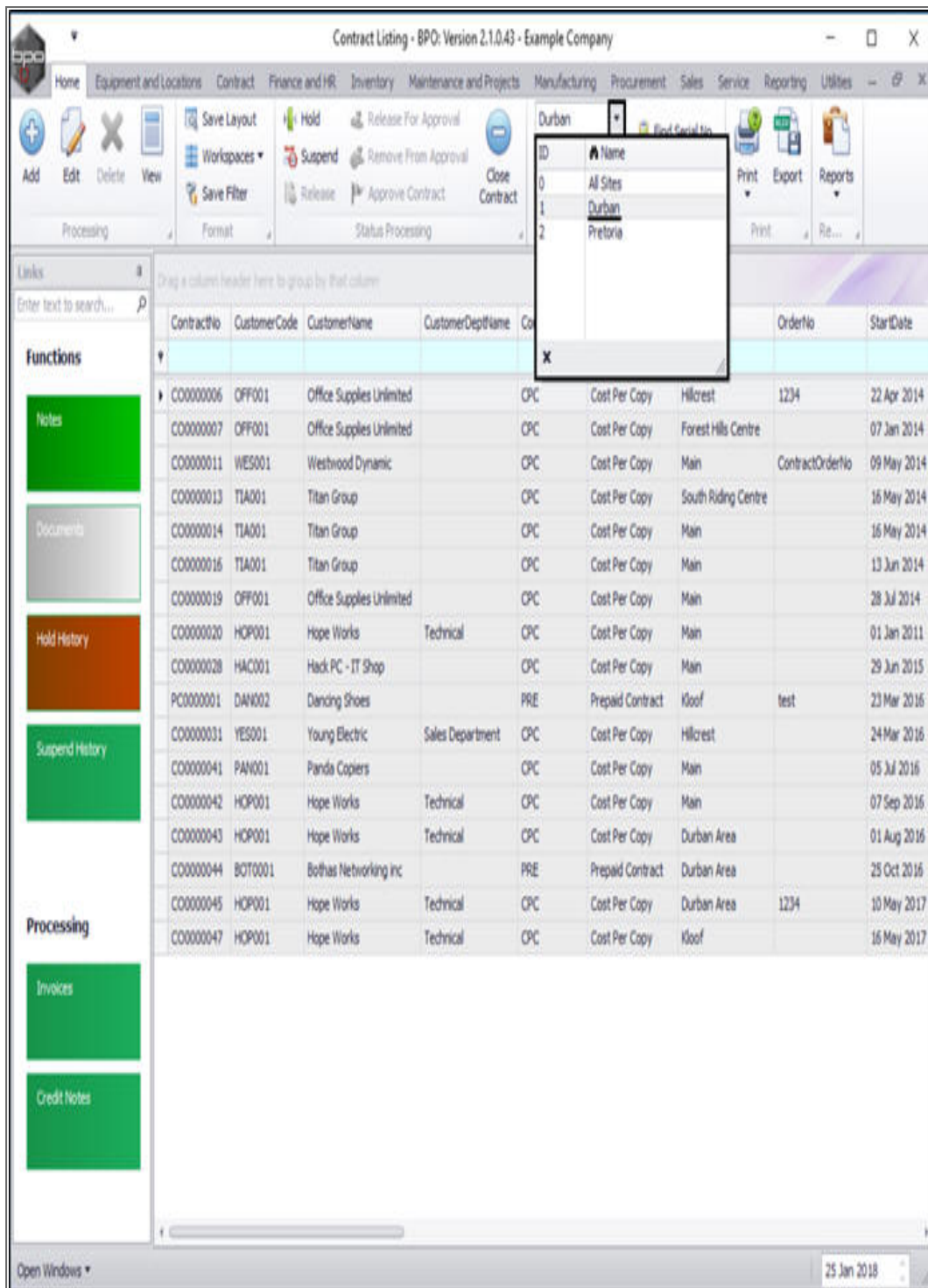
A contract is placed on **Hold** due to customer/client reasons. An example of this can be: **non-payment**.

When a contract is placed on hold, the system will prevent call logging, but the customer will still be included in the month end billing.

Ribbon Access: *Contract > Contracts*



- The **Contract Listing** screen will display.
- Select the **Site** that contains the contract you wish to place on Hold.
 - In this example, **Durban** has been selected.



Contract Listing - BPO: Version 2.1.0.43 - Example Company

Menu: Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Toolbar: Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Hold, Release For Approval, Suspend, Remove From Approval, Release, Approve Contract, Close Contract

Dropdown: Durban

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	Cost Per Copy	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000044	BOT0001	Botmas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017

Left Panel: Functions (Notes, Documents, Hold History, Suspend History), Processing (Invoices, Credit Notes)

Bottom: Open Windows, 25 Jan 2018

- Upon opening, this screen will default to the **Active** status.

Note: A contract can only be put on Hold whilst in this status.

- If the screen is open in a *different* status, click on the drop-down *arrow* in this field and select **Active** from the menu.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Suspend Release Remove From Approval Approve Contract Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links Enter text to search... Drag a column header here to group by that column

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO0000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO0000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof	test	16 May 2017
PC0000001	DAN002	Dancing Shoes		PRI	Prepaid Contract	Kloof		23 Mar 2016
CO0000044	BOT0001	Bothas Networking Inc		PRI	Prepaid Contract	Durban Area		25 Oct 2016

Open Windows 25 Jan 2018

SELECT CONTRACT

- Select the **row** of the contract you wish to place on hold.
- Click on **Hold**.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release For Approval Release Remove From Approval Approve Contract Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links

Enter text to search...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO0000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO0000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016
CO0000044	BOT0001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows

25 Jan 2018

The **Contract on Hold: []** screen will open.

ADD HOLD DETAILS

- **Date:** This will auto populate with the *current* date.
 - Either type in or click on the drop-down arrow and use the calendar function to select an *alternative* date.
 - Either type in or use the arrow indicators to select an alternative time.
- **Reason:** Type in the reason for putting this contract on hold.
- **Est. Release Date:** This will auto populate 48 hours after the hold date.
 - Either type in or click on the drop-down arrow and use the calendar function to select an *alternative* release date, if required.
 - Either type in or use the arrow indicators to select an *alternative* release time, if required.
- **Employee:** Select the name of the employee who has requested to place this contract on hold.

Contract on Hold : CO0000045 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save

Back

Process

Date30 Jan 20189:21:12 AM

Reason

Est. Release Date01 Feb 20189:21:12 AM

EmployeeSarah Milder

Open Windows

25 Jan 2018

SAVE HOLD DETAILS

- When you have finished adding details in this screen, click on **Save**.

Contract on Hold : CO0000045 - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Date30 Jan 20189:21:12 AM

ReasonNon payment

Est. Release Date01 Feb 20189:21:12 AM

EmployeeJoseph Timber

Open Windows

25 Jan 2018

- You will return to the ***Contract Listing*** screen.
- A ***Customer Processing*** message box will pop up advising the following:
 - *Contract No: [] has been placed on hold.*
- Click on ***Ok***.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links

Enter text to search...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO0000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO0000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO0000016	TIA001	Titan Group						13 Jun 2014
CO0000019	OFF001	Office Supplies Unlimited						28 Jul 2014
CO0000020	HOP001	Hope Works						01 Jan 2011
CO0000028	HAC001	Hack PC - IT Shop						29 Jun 2015
PC0000001	DAN002	Dancing Shoes				test		23 Mar 2016
CO0000031	YES001	Young Electric						24 Mar 2016
CO0000041	PAN001	Panda Copiers						05 Jul 2016
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO0000044	BOT001	Bothas Networking Inc		PRI	Prepaid Contract	Durban Area		25 Oct 2016
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017

Customer Processing

Contract No : CO0000045 has been placed on hold.

OK

Processing

Invoices

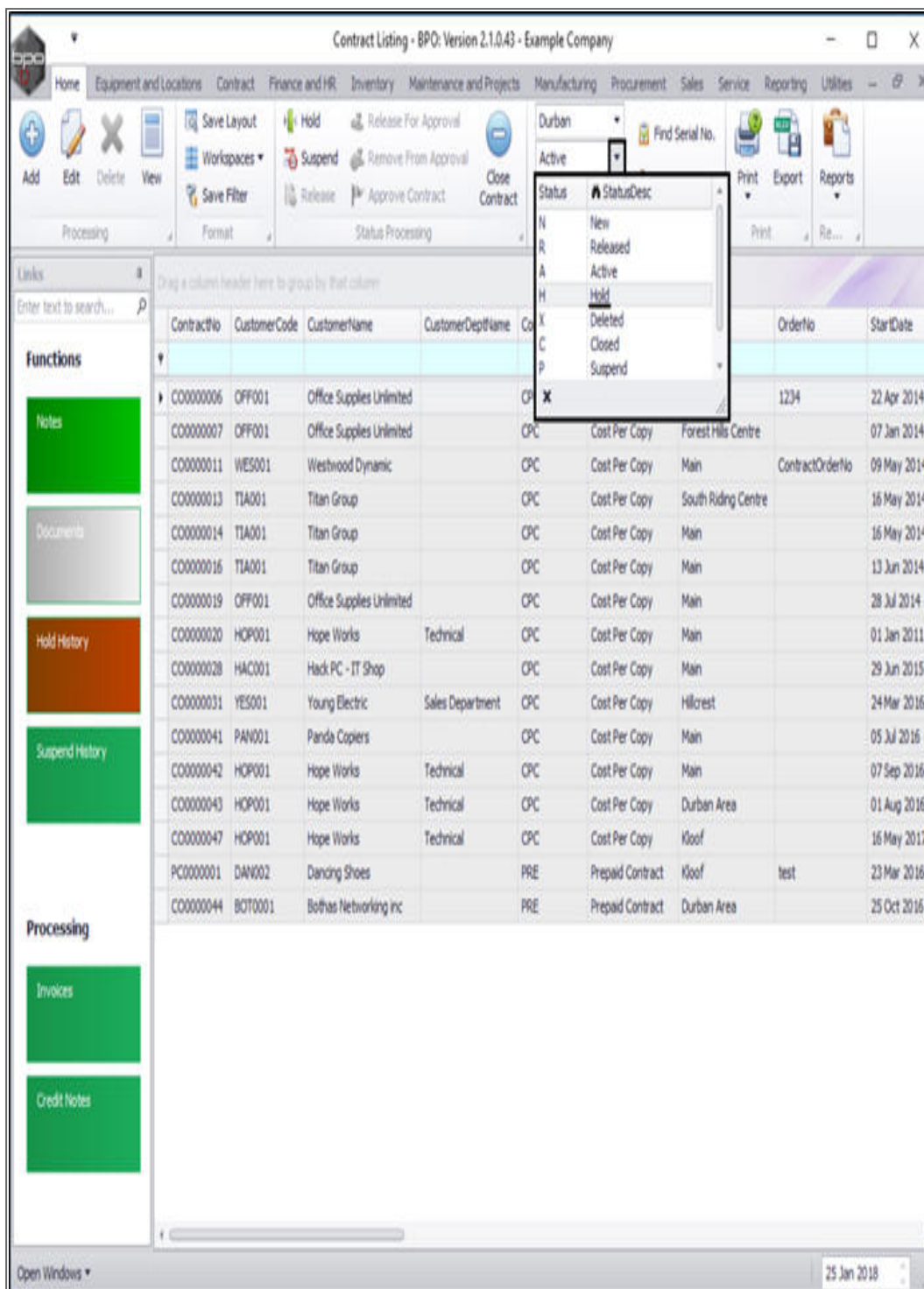
Credit Notes

Open Windows

25 Jan 2018

VIEW CONTRACT IN HOLD STATE

- This contract has now been ***moved*** from the ***Active*** status to the ***Hold*** status.
- Select the ***Hold*** status.



Contract Listing - BPO: Version 2.1.0.43 - Example Company

Menu: Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Toolbar: Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Hold, Release For Approval, Suspend, Remove From Approval, Release, Approve Contract, Close Contract

Dropdown Menu: Status (New, Released, Active, **Hold**, Deleted, Closed, Suspend)

ContractNo	CustomerCode	CustomerName	CustomerDeptName	Cost	Status	StatusDesc	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
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CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
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CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017
PC000001	DAN002	Dancing Shoes		PRI	Prepaid Contract	Kloof	test	23 Mar 2016
CO000044	BOT0001	Bothas Networking inc		PRI	Prepaid Contract	Durban Area		25 Oct 2016

Left Panel: Functions (Notes, Documents, Hold History, Suspend History), Processing (Invoices, Credit Notes)

Bottom: Open Windows, 25 Jan 2018

- You can now view the contract in the Contract Listing screen where the status is set to **Hold**.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter Hold Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links Enter text to search...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Depart
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows 25 Jan 2018

MNU.112.015

