

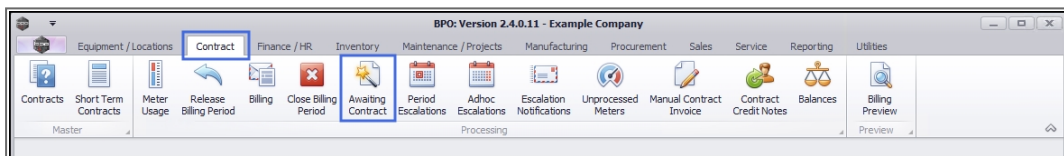
CONTRACT

AWAITING CONTRACT

This screen displays items 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](#))
- A or B-class [customer assets](#).

Ribbon Access: *Contract > Awaiting Contract*



The **Items Awaiting Contract** listing screen will be displayed.

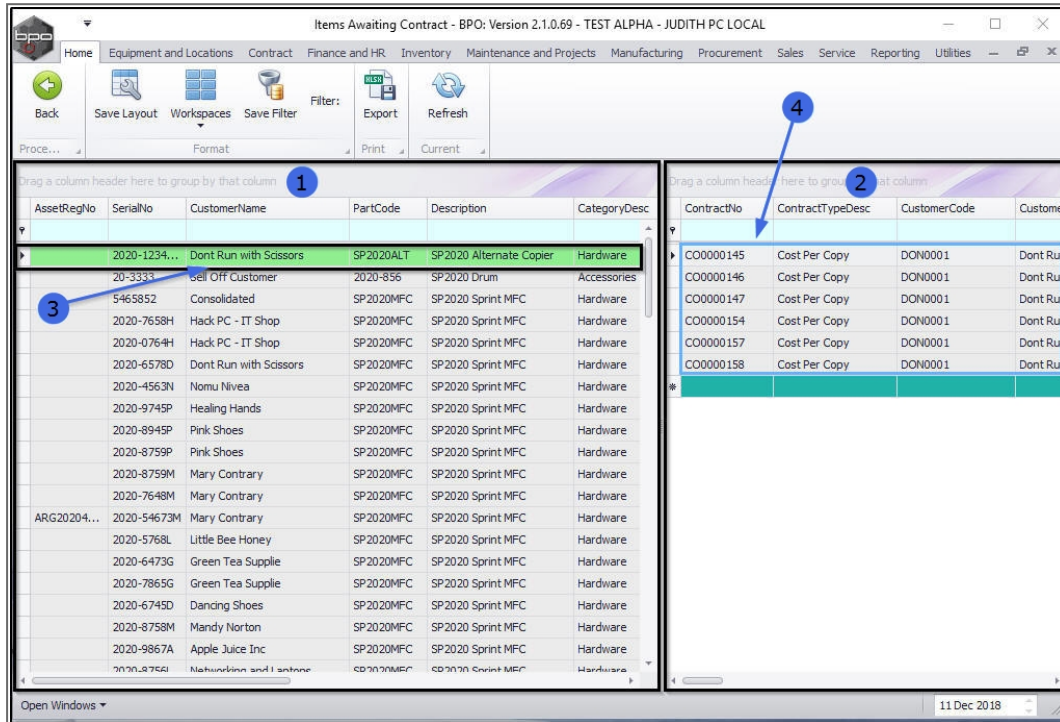
SCREEN OVERVIEW

The screen is divided into **2** data grids.

1. **Data grid 1:** displays all the items **waiting** to be allocated to a contract. These items can either be [customer assets](#) or [internal assets](#). For internal assets to be displayed, a **New Deal Rental** process has to be completed first.
2. **Data grid 2:** displays all the existing contracts for the **customer** linked to the machine serial no. selected in data grid 1.
3. For example in this image, a machine with serial no: **2020-12341IA** linked to customer **Don't Run with Scissors** is selected in data grid 1,

4. Therefore **all** contracts linked to customer **Don't Run with Scissors** are displayed in data grid 2.

- **Note:** **Deleted** or **Closed** contracts will not be displayed in this data grid.



AssetRegNo	SerialNo	CustomerName	PartCode	Description	CategoryDesc
2020-1234...	2020-12341A	Don't Run with Scissors	SP2020ALT	SP2020 Alternate Copier	Hardware
20-3333	5465852	Consolidated	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-7658H	2020-0764H	Hack PC - IT Shop	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-6578D	2020-6578D	Don't Run with Scissors	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-4563N	2020-9745P	Healing Hands	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-8945P	2020-8759P	Pink Shoes	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-8759M	2020-8759M	Mary Contrary	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-7648M	2020-54673M	Mary Contrary	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-5768L	2020-6473G	Green Tea Supple	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-7865G	2020-6745D	Dancing Shoes	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-8758M	2020-9867A	Apple Juice Inc	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-8758M	2020-8758M	Mandy Norton	SP2020MFC	SP2020 Sprint MFC	Hardware

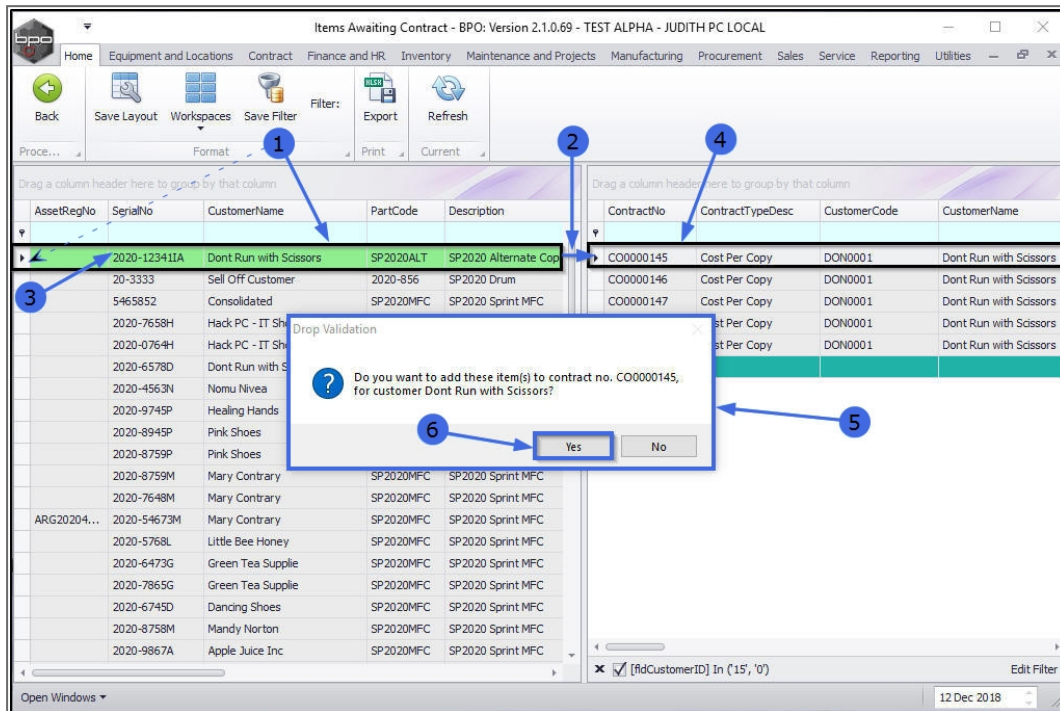
ContractNo	ContractTypeDesc	CustomerCode	CustomerName
CO0000145	Cost Per Copy	DON0001	Don't Run with Scissors
CO0000146	Cost Per Copy	DON0001	Don't Run with Scissors
CO0000147	Cost Per Copy	DON0001	Don't Run with Scissors
CO0000154	Cost Per Copy	DON0001	Don't Run with Scissors
CO0000157	Cost Per Copy	DON0001	Don't Run with Scissors
CO0000158	Cost Per Copy	DON0001	Don't Run with Scissors

LINK SINGLE ITEM TO EXISTING CONTRACT

1. **Click** and **hold** on the contract item in data grid 1.
 - **Note:** You may need to click and hold from the row selector column in the row.
2. **Drag** the contract item to an existing contract displayed in data grid 2.
3. In this example, serial no. **2020-12341A** has been selected, and will be dragged and dropped onto
4. Contract no. **CO0000145**.
5. As it is 'dropped', a **Drop Validation** message box will pop up asking;

- *Do you want to add these item(s) to contract no. [], for customer []?*

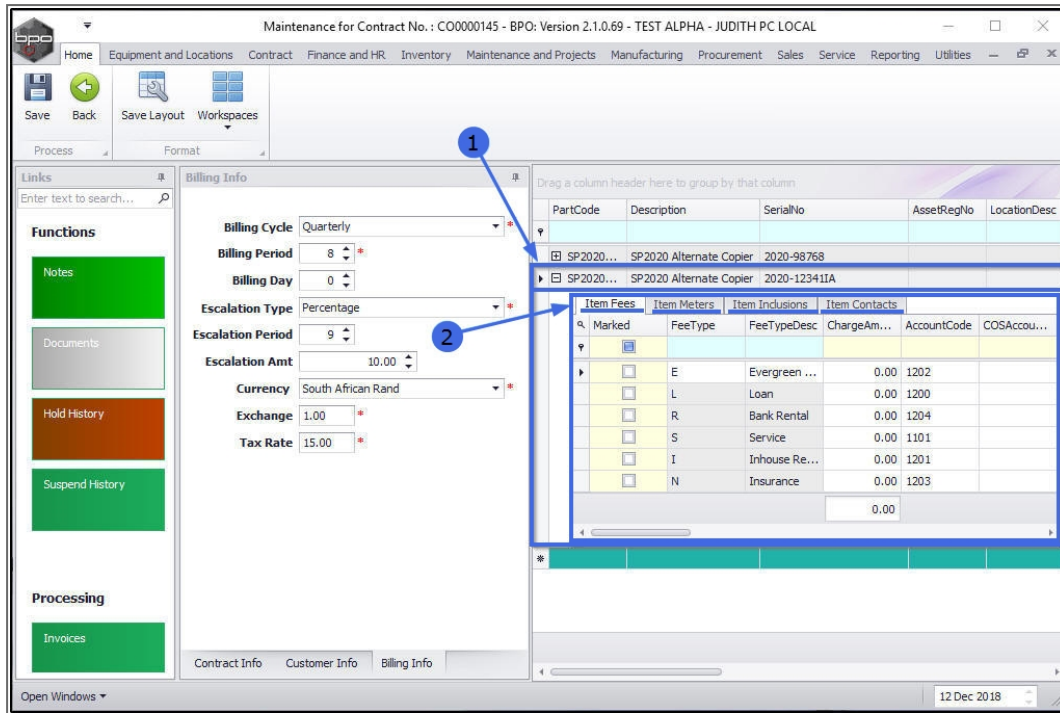
6. Click on **Yes**.



The **Maintenance for Contract No.: []** screen will open.

ADD ITEMS DETAILS/FEES

1. The contract item you have added will be listed last in the **Parts** data grid.
2. The **Items** frame sub grids - linked to this part - will be auto expanded and displayed, ready for adding information:
 - Item Fees
 - Item Meters
 - Item Inclusions
 - Items Contacts



Maintenance for Contract No.: CO0000145 - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

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Billing Info

Billing Cycle Quarterly

Billing Period 8

Billing Day 0

Escalation Type Percentage

Escalation Period 9

Escalation Amt 10.00

Currency South African Rand

Exchange 1.00

Tax Rate 15.00

Contract Info Customer Info Billing Info

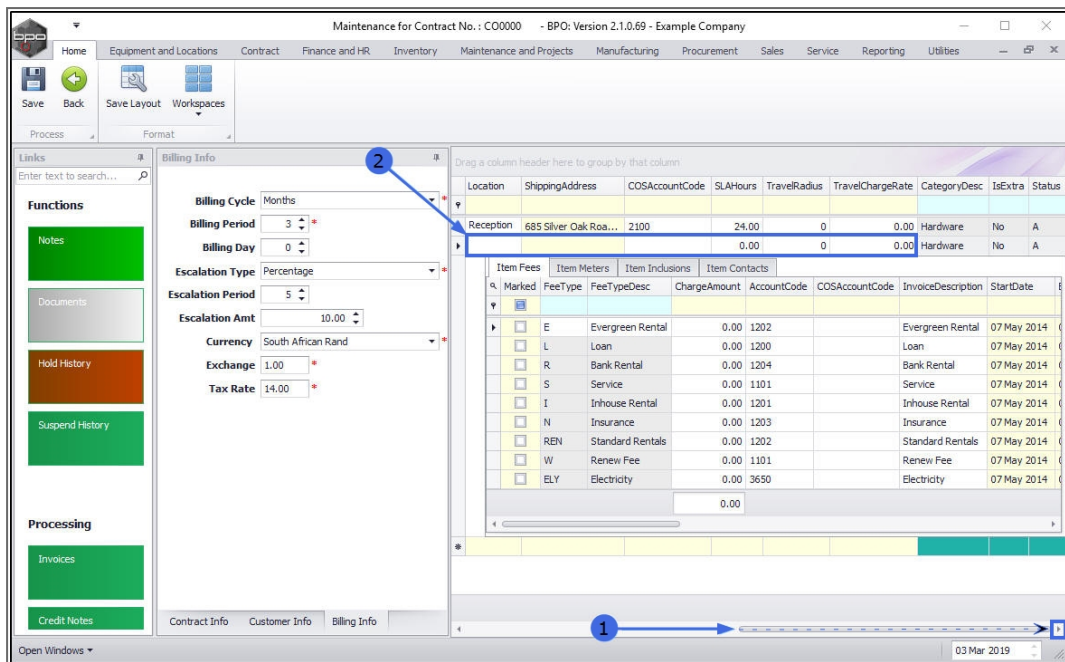
Open Windows

12 Dec 2018

PartCode	Description	SerialNo	AssetRegNo	LocationDesc
SP2020...	SP2020 Alternate Copier	2020-98768		
SP2020...	SP2020 Alternate Copier	2020-123411A		

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAm... AccountCode COSAccou...
	E	Evergreen ...	0.00 1202
	L	Loan	0.00 1200
	R	Bank Rental	0.00 1204
	S	Service	0.00 1101
	I	Inhouse Re...	0.00 1201
	N	Insurance	0.00 1203
			0.00

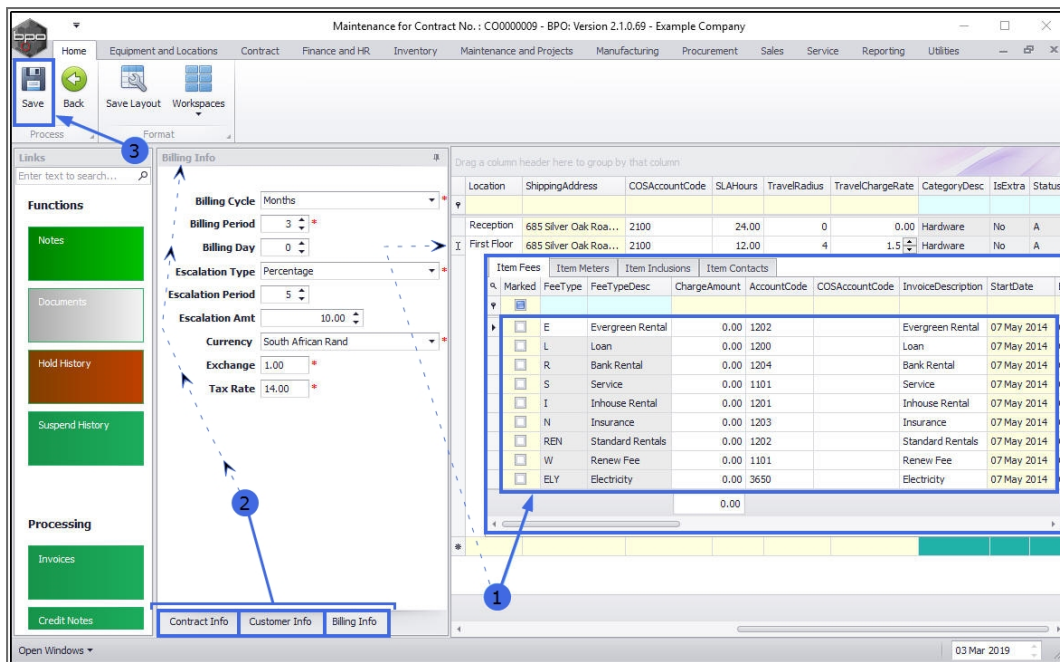
1. **Scroll right** in the row of the contract item to view more information.
2. You can update/edit the following fields:
 - Link a **Location**
 - Link a **Shipping Address**
 - Link a **COS Account Code**
 - Link a **SLA Hours**
 - Link a **Travel Radius**
 - Link a **Travel Charge**



1. When you have added the Contract Item and Item Fee information as required,
2. You can move across to the Contract Information frames: **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel**. These can be left as is, unless a particular change has been requested and you are authorised to do so.

SAVE SINGLE LINKED ITEM

3. Click on **Save**.

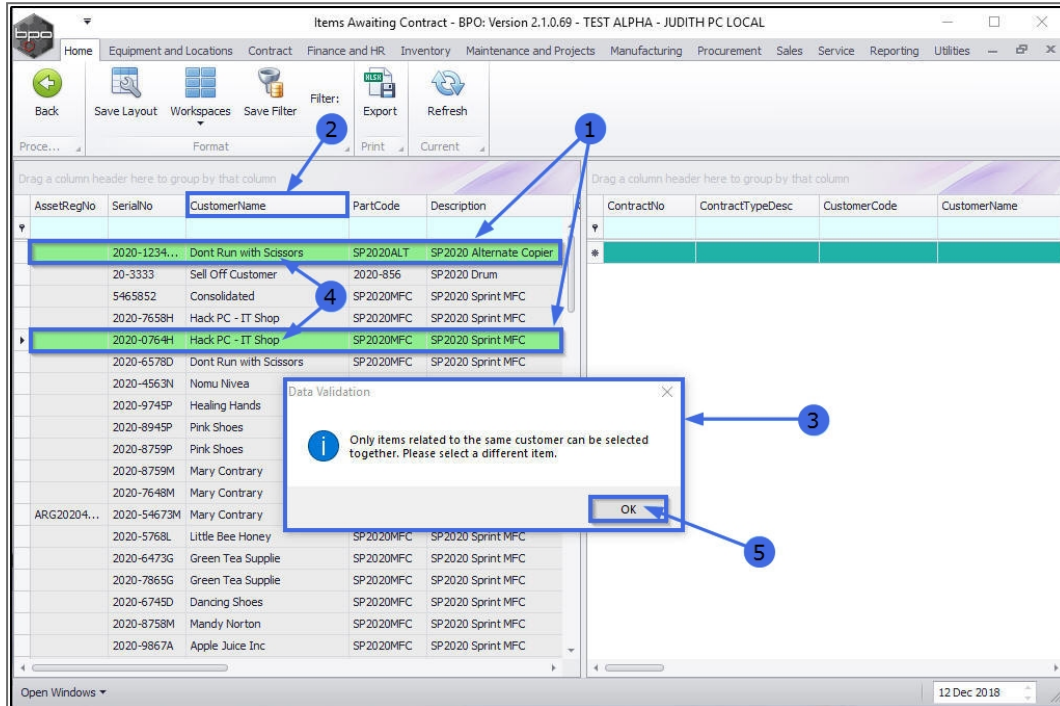


- The linked item will be **saved** to the contract and you will return to the **Items Awaiting Contract** screen.

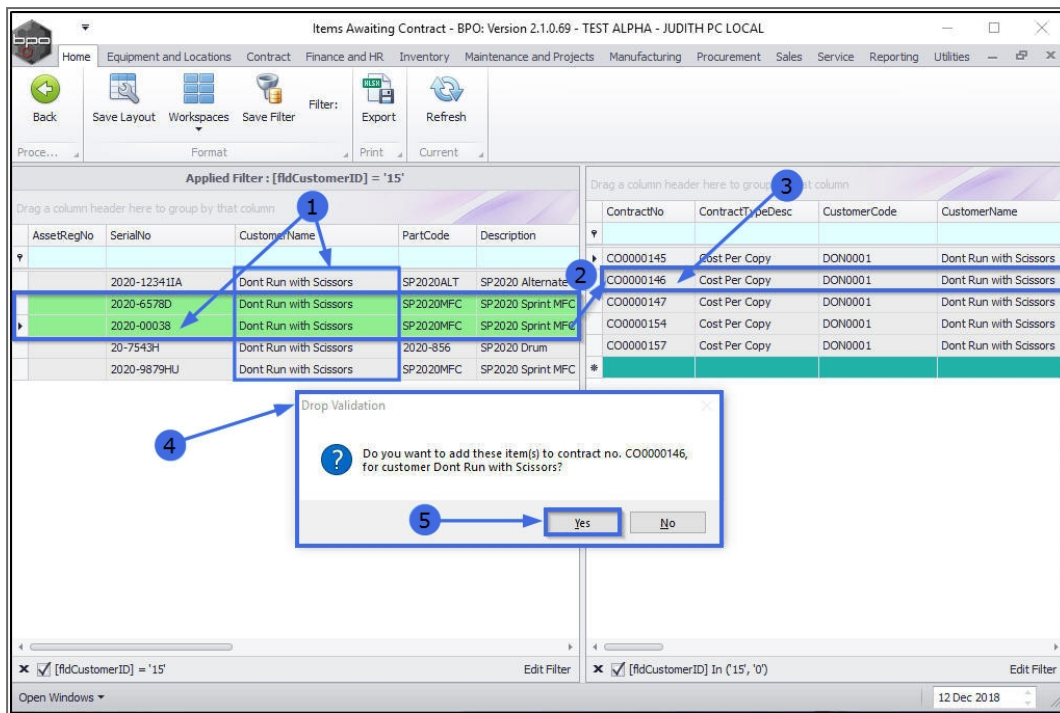
LINK MULTIPLE ITEMS TO EXISTING CONTRACT

1. In the **Items Awaiting Contract** screen, select the multiple items in data grid **1** that you wish to be linked to an existing contract.
 - In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.
2. **Important Note:** The items selected have to belong to the same customer.
3. If you select items belonging to different customers then a **Data Validation** message box will pop up advising you that;
 - **Only items related to the same customer can be selected together. Please select a different item.**

4. In this example an item linked to customer ***Don't Run with Scissors*** and another item linked to customer ***Hack PC - IT Shop*** have been incorrectly selected.
5. Click on **OK** to clear the message and restart the selection.



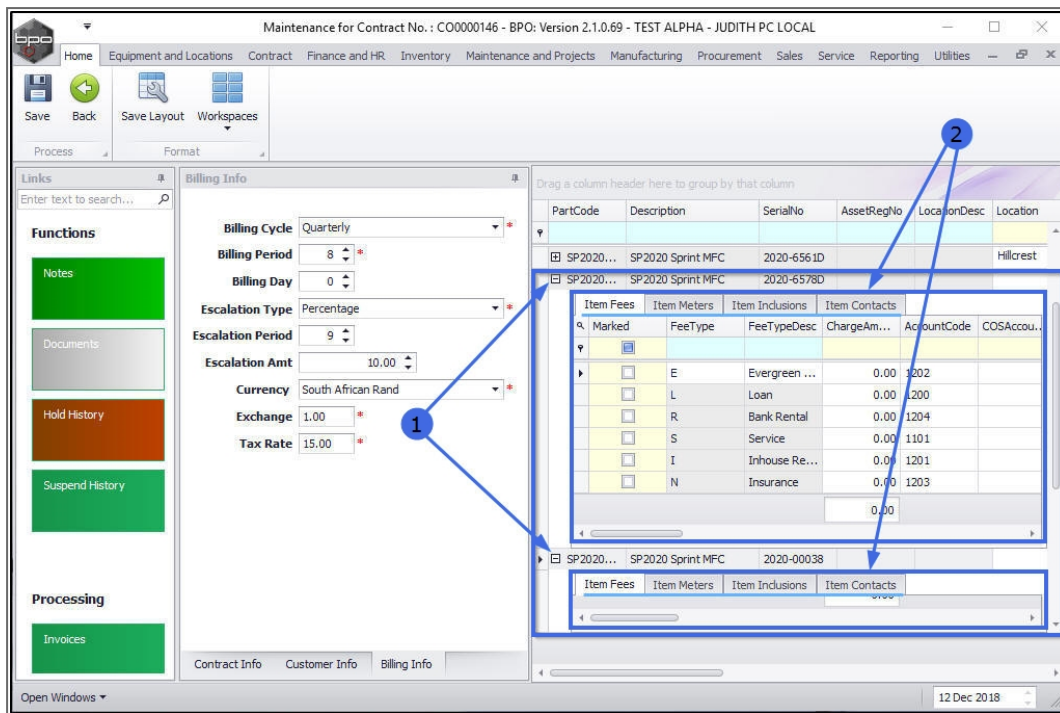
1. Select all the contract items that you wish to link.
2. **Drag** the items to an existing contract in data grid 2.
3. In this image, serial no **2020-00038** and **2020-6578D** have been selected, dragged and dropped on to contract no **CO0000146**.
4. A **Drop Validation** message box will pop up asking;
 - **Do you want to add these item(s) to contract no. [] for customer []**
5. Click on **Yes**.



The **Maintenance for Contract No []** screen will be displayed.

ADD ITEM DETAILS/FEES

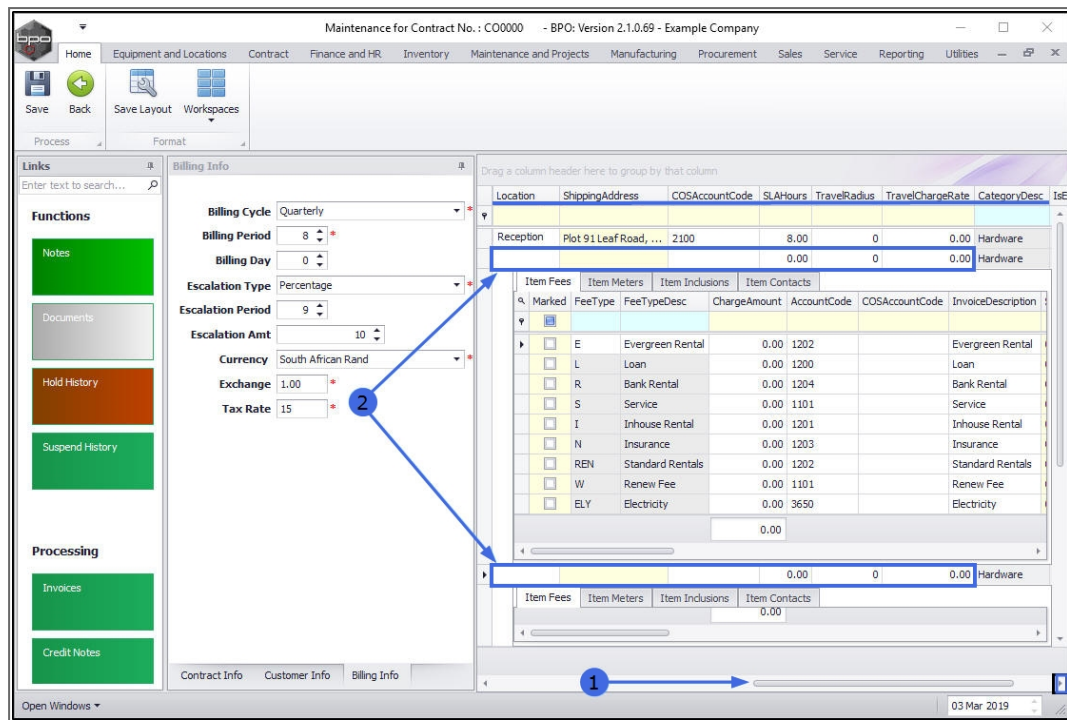
1. The items you are adding to the contract will be listed last in the **Parts** data grid.
2. The **Items sub grids** linked to these parts will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract item information.

2. You can update/edit the following fields:

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



Maintenance for Contract No.: CO0000 - BPO: Version 2.1.0.69 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links Enter text to search...

Functions

Notes

Documents

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Suspend History

Processing

Invoices

Credit Notes

Contract Info Customer Info Billing Info

Open Windows

03 Mar 2019

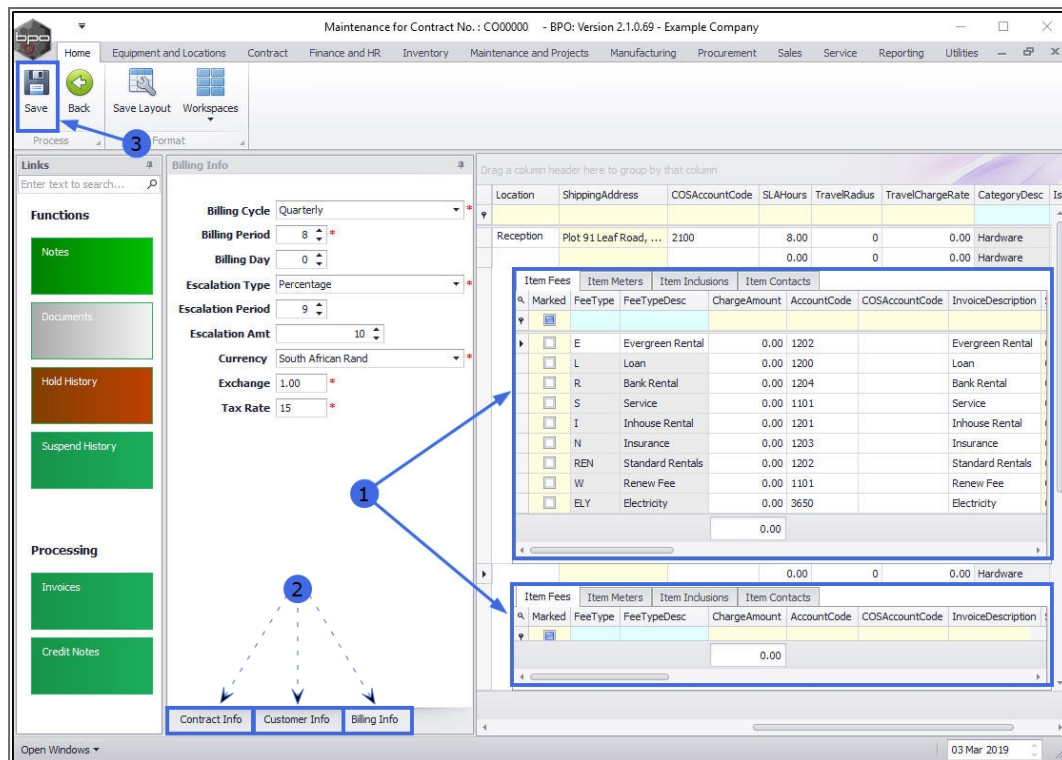
Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc
Reception	Plot 91 Leaf Road, ...	Z100	8.00	0	0.00	Hardware
			0.00	0	0.00	Hardware

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAmount
	AccountCode	COSAccountCode	InvoiceDescription
	E	Evergreen Rental	0.00 1202
	L	Loan	0.00 1200
	R	Bank Rental	0.00 1204
	S	Service	0.00 1101
	I	Inhouse Rental	0.00 1201
	N	Insurance	0.00 1203
	REN	Standard Rentals	0.00 1202
	W	Renew Fee	0.00 1101
	ELY	Electricity	0.00 3650
			0.00

1. You can input relevant data for the **Parts (Equipment Item)** frame.
2. Leave the **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** as is.

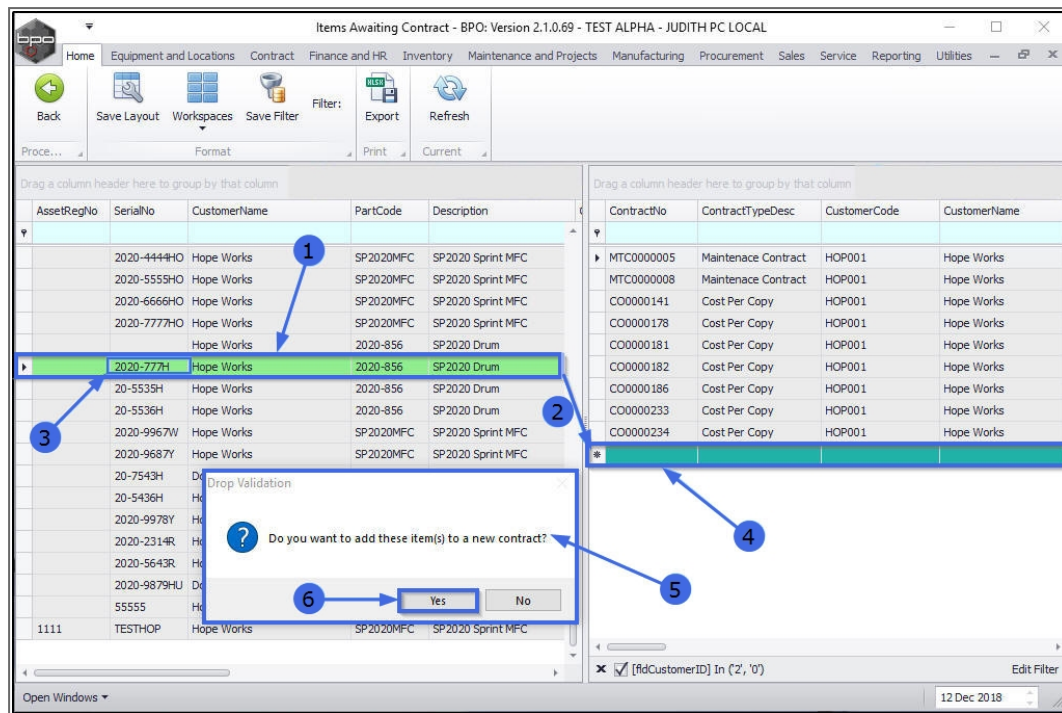
SAVE MULTIPLE LINKED ITEMS

3. Click on **Save**.

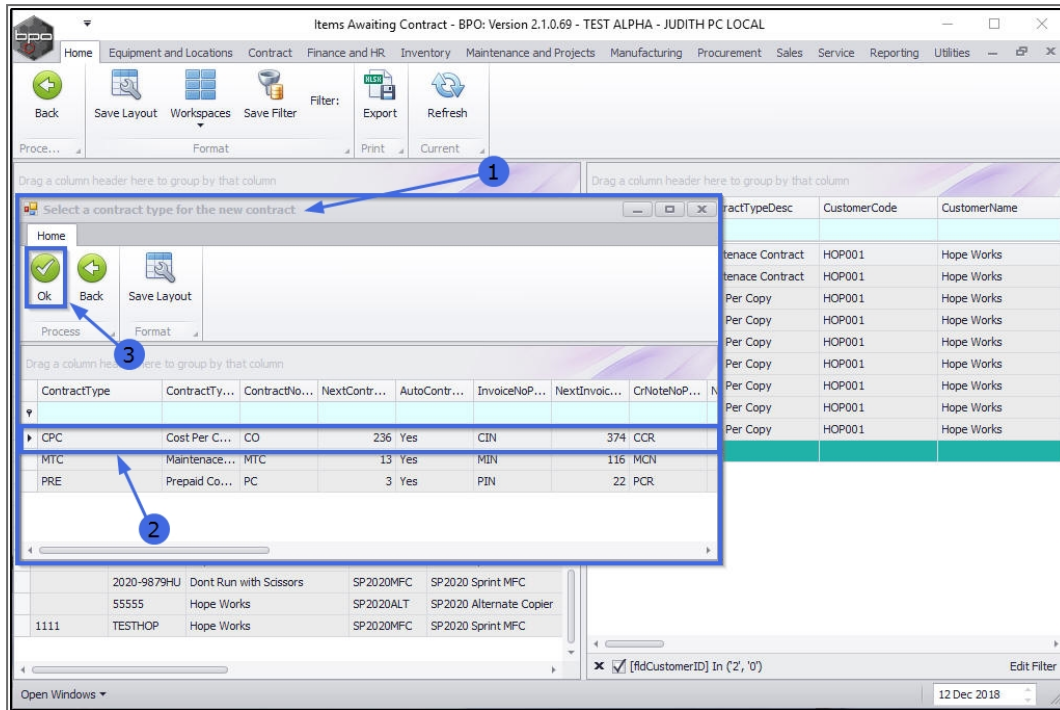


LINK SINGLE ITEM TO A NEW CONTRACT

1. In the *Items Awaiting Contract* screen, click on the single item in data grid **1** that you wish to add to a **new** contract
2. Drag the item to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
3. In this example, serial no **2020-777H** has been selected, dragged and dropped to
4. the final **blank row** in data grid **2**.
5. A **Drop Validation** message box will pop up asking;
 - **Do you want to add these item(s) to a new contract?**
6. Click on **Yes**.



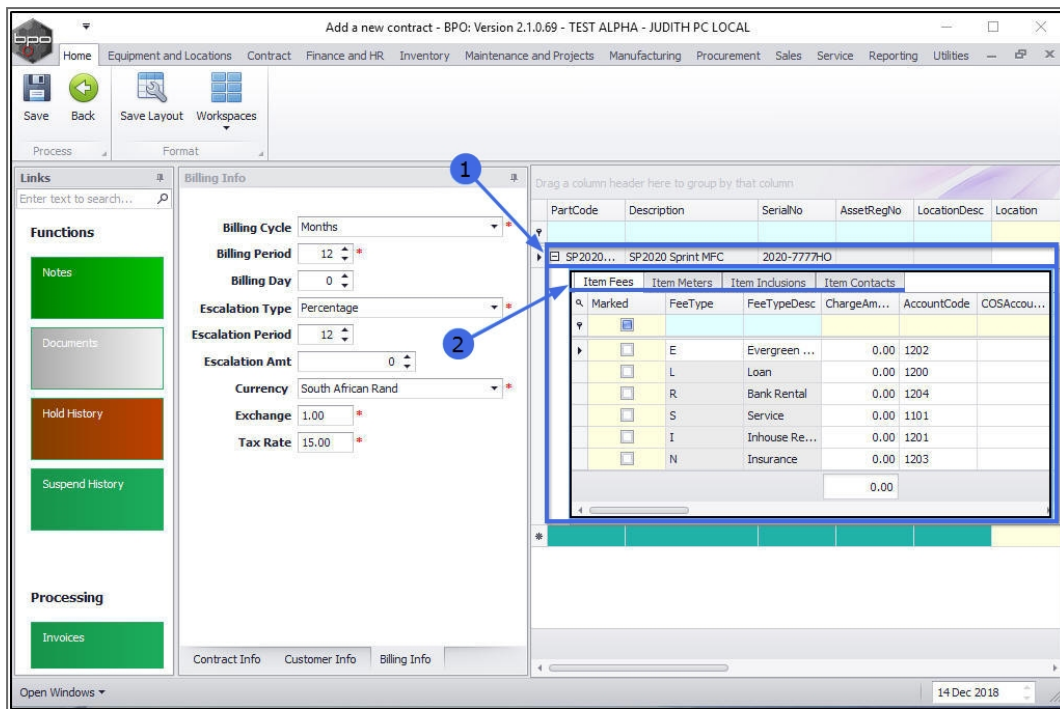
1. The **Select a contract type for the new contract** screen will pop up.
2. **Click anywhere** in the **row** of the **contract type** you wish to add.
3. Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected



The **Add a new contract** screen will be displayed.

ADD ITEM DETAILS/FEES

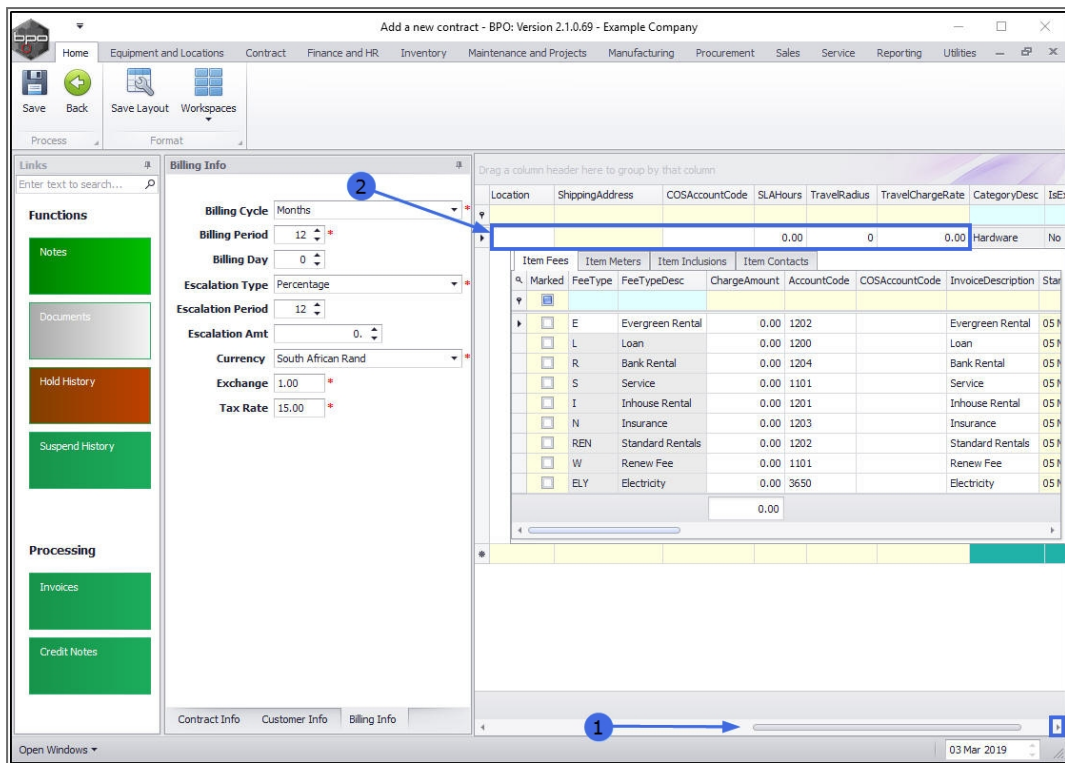
1. The item you are adding to the new **contract** will be listed in the **Parts** data grid.
2. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract item information.

2. You can update/edit the following fields:

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



CO3 BPO Version 2.1.0.69 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links Enter text to search...

Functions

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Processing

Invoices

Credit Notes

Billing Info

Billing Cycle Months

Billing Period 12

Billing Day 0

Escalation Type Percentage

Escalation Period 12

Escalation Amt 0.

Currency South African Rand

Exchange 1.00

Tax Rate 15.00

Contract Info Customer Info Billing Info

Open Windows

03 Mar 2019

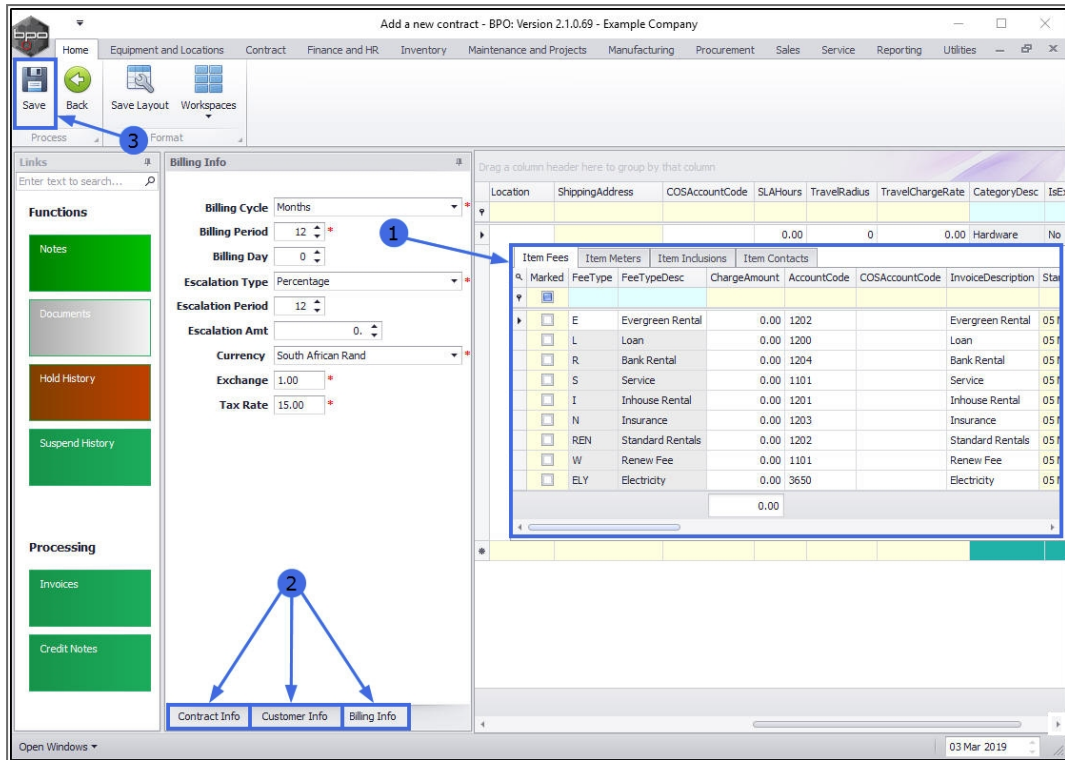
Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsEx
			0.00	0	0.00	Hardware	No

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAmount
	E	Evergreen Rental	0.00
	L	Loan	0.00
	R	Bank Rental	0.00
	S	Service	0.00
	I	Inhouse Rental	0.00
	N	Insurance	0.00
	REN	Standard Rentals	0.00
	W	Renew Fee	0.00
	ELY	Electricity	0.00

1. You can input relevant data for the **Part Item frame**.
2. Add the **new** contract details to the; **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** panels.

SAVE LINKED ITEM

1. Click on **Save**.



- The item will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

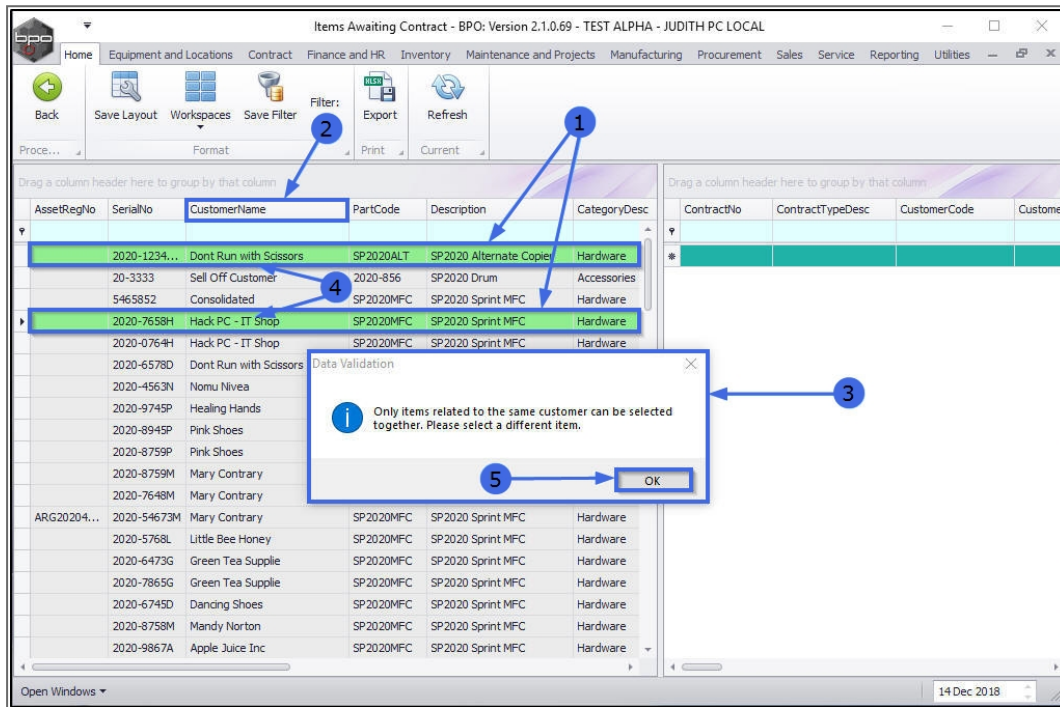
LINK MULTIPLE ITEMS TO A NEW CONTRACT

1. In the **Items Awaiting Contract** screen, select the multiple items in data grid **1** that you wish to link to a **new** contract.

In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

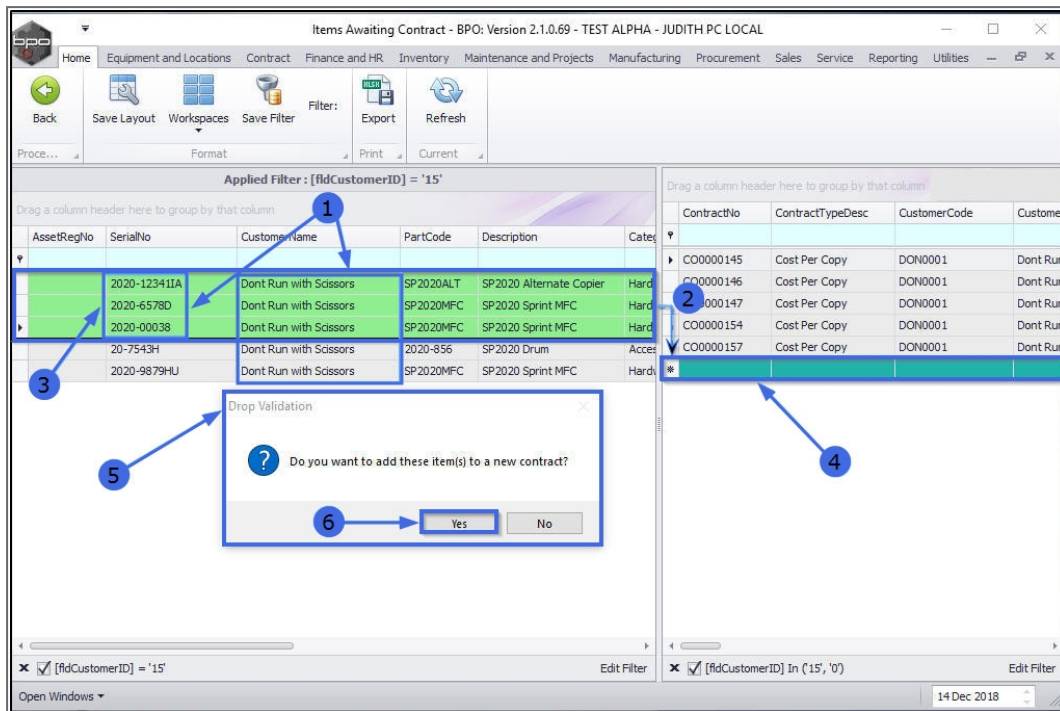
2. **Important Note:** The items selected have to belong to the **same** customer.
3. If you select items belonging to different customers then a **Data Validation** message box will pop up advising you that;

- **Only items related to the same customer can be selected together. Please select a different item.**
- In this example an item linked to customer **Don't Run with Scissors** and another item linked to customer **Hack PC - IT Shop** have been incorrectly selected.
 - Click on **OK** to clear the message and restart the selection.

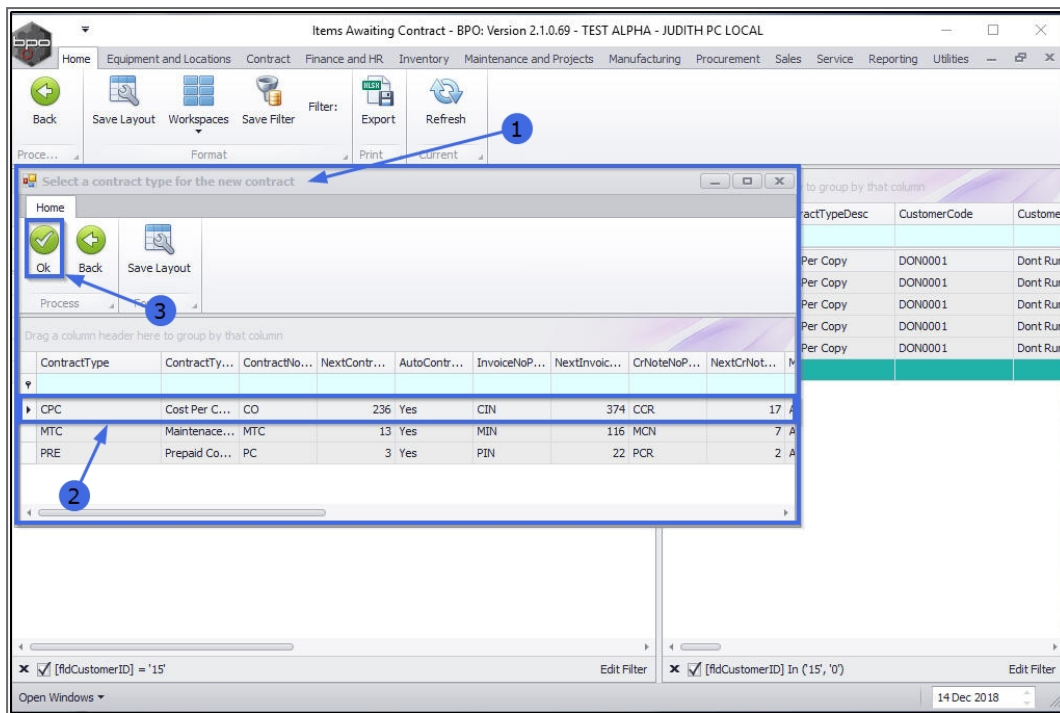


- As you select the second item line linked to the same customer, the system will auto filter the item lines in data grid **1**, to display only the items linked to that customer.
- Drag** the items to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
- In this image, serial no's **2020-12341A**, **2020-6578D** and **2020-00038** have been selected, dragged and dropped on to
- the final **blank row** in data grid **2**.
- A **Drop Validation** message box will pop up asking;
 - **Do you want to add these item(s) to a new contract?**

6. Click on **Yes**.



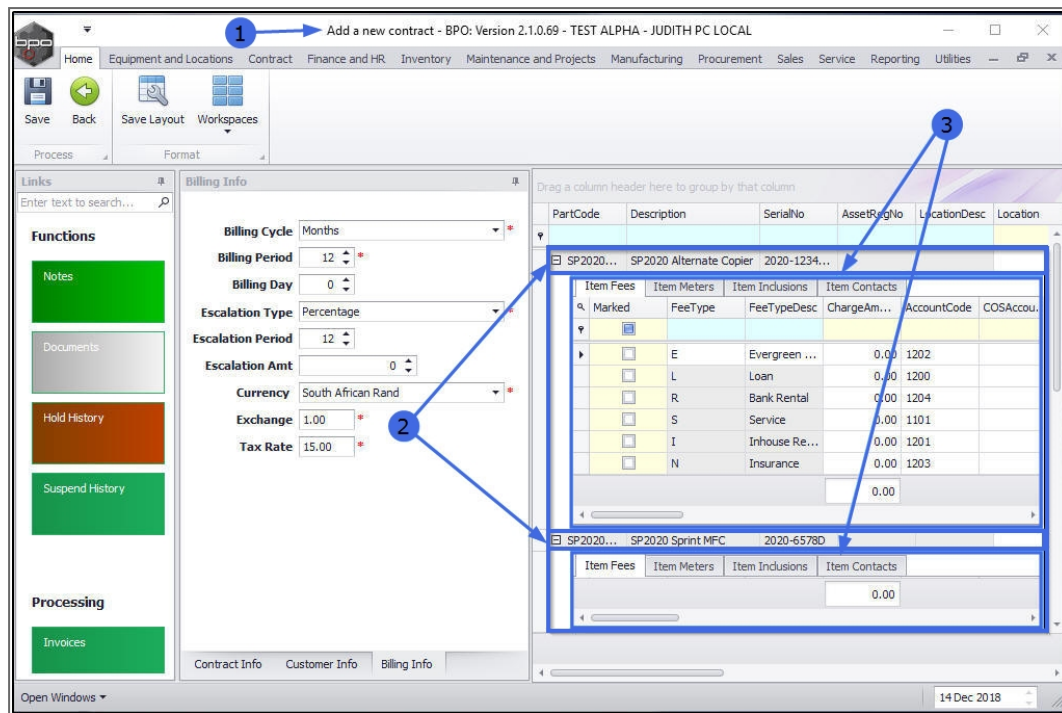
1. The **Select a contract type for the new contract** screen will pop up.
2. **Click anywhere** in the **row** of the **contract type** you wish to add.
3. Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected.



1. The **Add a new contract** screen will be displayed.
2. The items that you are adding to the **new** contract will be listed in the **Parts** data grid.

ADD ITEM DETAILS/FEES

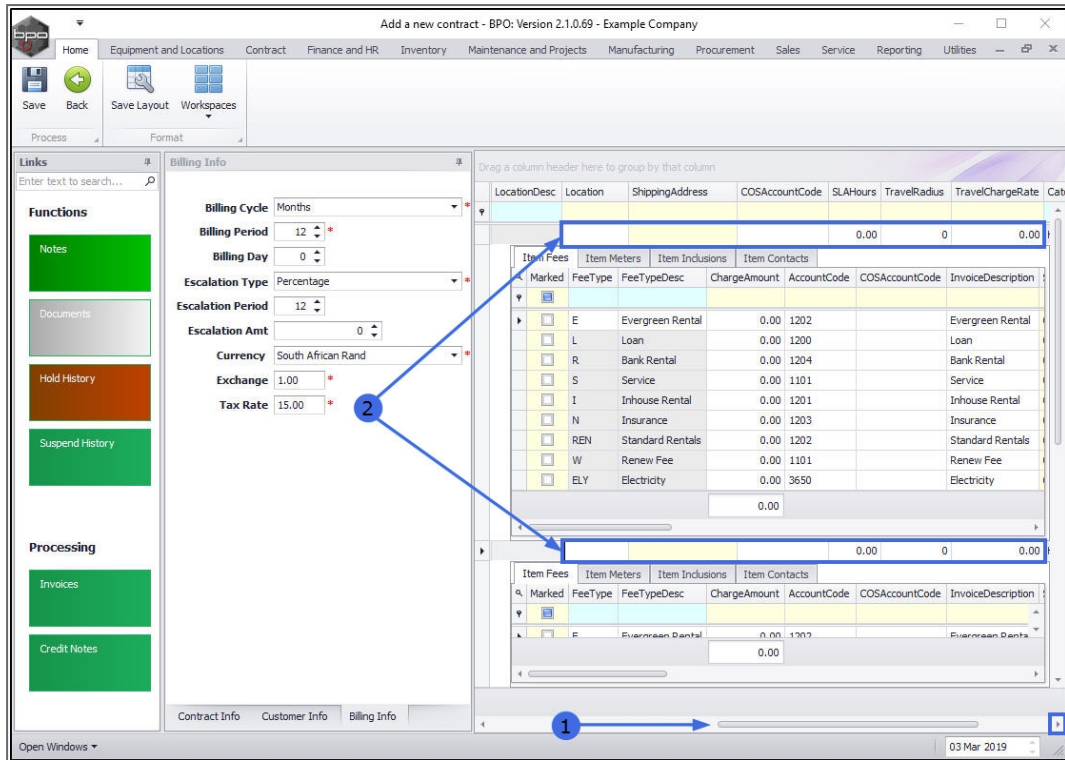
1. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract items information.

2. You can update/edit the following fields:

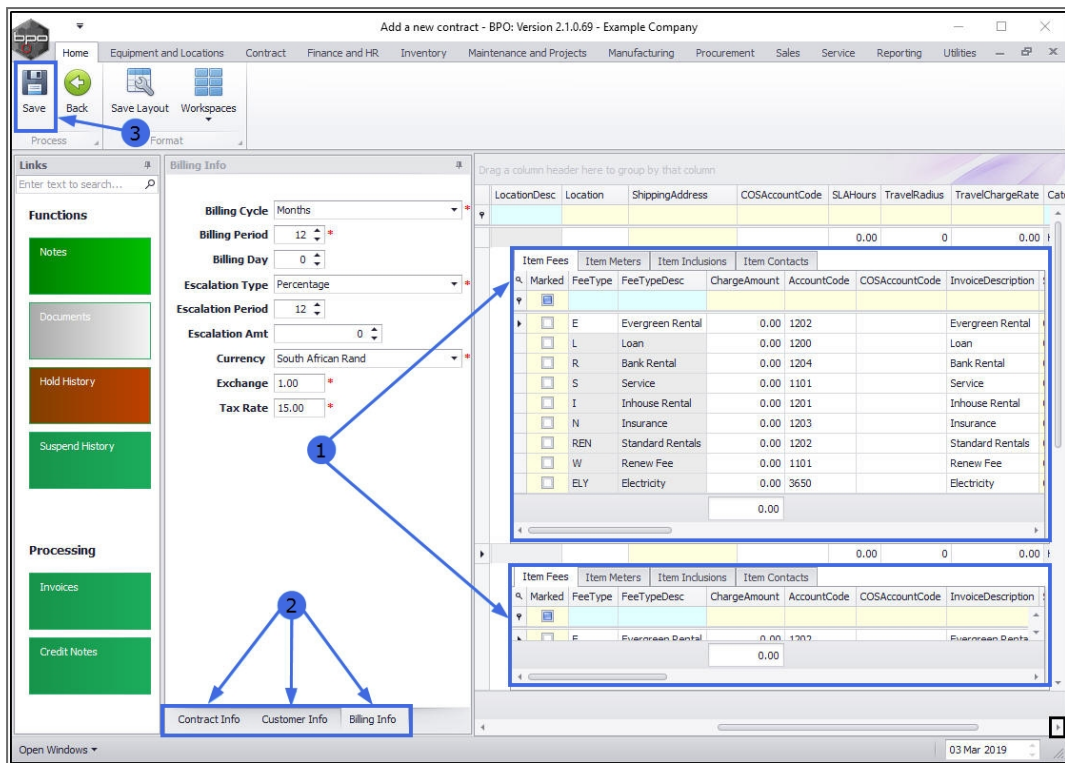
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



1. You can input relevant data for the **Parts Item frames**.
2. Add the **new** contract details to the; **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** panels.

SAVE MULTIPLE LINKED ITEMS

1. Click on **Save**.



- The items will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

MNU.112.045