

SERVICE

CALLS - AWAITING CONTRACT

This screen displays items linked to the selected call 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: Service > Calls

						BPO: 1	/ersion 2.4.0.0	- TEST AL	PHA - JU	JDITH PC LOCAL								
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- The *Call Listing* screen will be displayed.
- Select the call with the item you wish to put on contract and click on *Edit*.



Calls - Awaiting Contract

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-	New	181		18/01/2022	Awaiting Acceptance	Julanda Kessler	12:51:45	Printer displaying error code	REP	Repair
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-	Hold Pending	4		22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena	SM	Scheduled Maintenance
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- The *Call Maintenance* screen will be displayed.
- Click on the *For Contract* tile.

\$ •		Call mainte	enance : Call ref CNO	0005305 - BPO: Ver	sion 2.5.0.8 -	Example Company	v2.5.0.8					x
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- The *Items Awaiting Contract for Call []* screen will be displayed.
- The screen is divided into **2** data grids.



- Data grid 1: displays all the items linked to the selected call *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 Rental process has to be completed first.
- 2. Data grid 2: displays all the existing contracts for the *customer* linked to the call.

Ŧ		Item	s Awaiting Cont	ract for Call, Ref No : DC	N0000207 - BPO: \	Ver	sion 2.4.0.0 - TEST	ALPHA - JUDITH PC LOCA	AL.		
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	2020-707541	Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware		CO0000141	Cost Per Copy	HOP001	Hope Works	03/10/201
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							CO0000266	Cost Per Copy	HOP001	Hope Works	01/12/2019
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							CO0000270	Cost Per Copy	HOP001	Hope Works	09/01/2020
							CO0000272	Cost Per Copy	HOP001	Hope Works	14/01/2020
							CO0000273	Cost Per Copy	HOP001	Hope Works	01/02/2020
							CO0000181	Cost Per Copy	HOP001	Hope Works	04/10/201
							CO0000182	Cost Per Copy	HOP001	Hope Works	04/10/201
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							CO000237	Cost Per Copy	HOP001	Hope Works	01/01/2019
							CO0000238	Cost Per Copy	HOP001	Hope Works	25/09/2019

 Note: Deleted or closed contracts will not be displayed in this data grid.

LINK A SINGLE ITEM TO AN EXISTING CONTRACT

- 1. *Click* and *hold* on the contract item in data grid **1**, that you wish to add to an existing contract.
- 2. *Drag* the contract item to an existing contract displayed in data grid **2**.
- 3. In this image, serial no. **2020-7685P** has been selected, and will be dragged and dropped onto



- 4. Contract no. CO0000260.
- 5. As it is 'dropped', a *Drop Validation* message box will pop up asking;
 - Do you want to add these items(s) to contract no. [], for customer []?
- 6. Click on Yes.

• •		Item	s Awaiting Contr	act for Call, Ref No : DCM	N0000207 - BPO:	Version 2.4.0.0	TEST ALPHA - JUDITH PC LOCA	L		_ •	X
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3	2020-1111s	Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware	CO0000240	Cost Per Copy	HOP001	Hope Works	01/06/2019	9
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The *Maintenance for Contract No.:* [] screen will be displayed.

- 1. The contract item you have added will be listed last 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



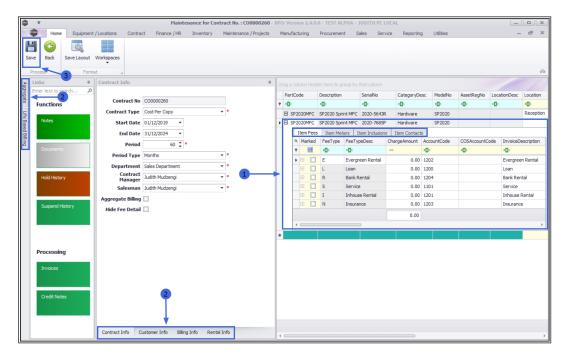
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- 1. Scroll right to view all the contract item information.
- 2. You can update /edit the following fields:
 - Link a Location
 - Link a Shipping Address
 - Link a COS Account Code
 - Link a SLA Hours
 - Link a Travel Radius
 - Link a Travel Charge



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- 1. You can input relevant data for the Part Item frames.
- 2. Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.
- 3. Click on *Save*.





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

LINK MULTIPLE ITEMS TO AN EXISTING CONTRACT

- In the *Items Awaiting Contract for Call* 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 <u>more than one item</u> on this data grid, press and hold **Ctrl** on the keyboard as you use your mouse to click on each item.
- 2. *Drag* the items to an existing contract in data grid 2.
- 3. In this image, serial no *2020-707541* and *2020-1111s* have been selected, dragged and dropped on to contract no *CO0000257*.
- 4. A Drop Validation message box will pop up asking;
 - Do you want to add these items(s) to contract no. [] for customer []?
- 5. Click on Yes.



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

- 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



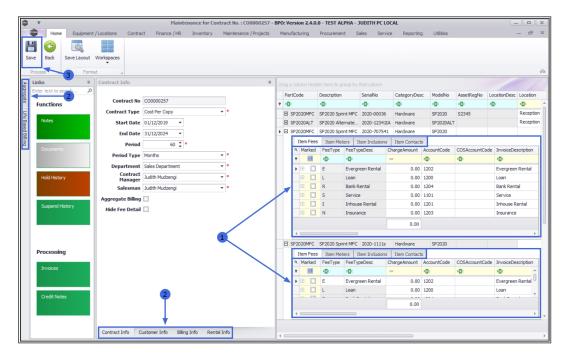
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- 1. Scroll right to view all the contract item information.
- 2. You can update/edit the following fields:
 - Link a Location
 - Link a Shipping Address
 - Link a COS Account Code
 - Link a SLA Hours
 - Link a Travel Radius
 - Link a Travel Charge



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- 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.
- 3. Click on *Save*.

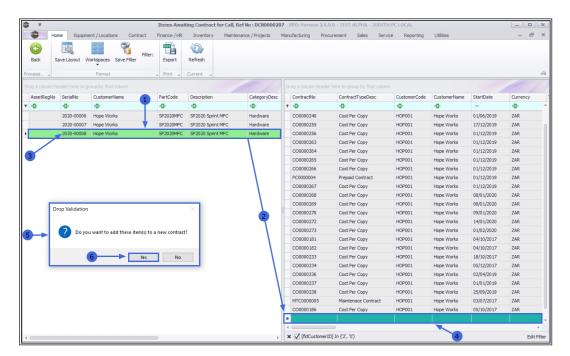




- The items will be linked to the *existing* contract and the contract details will be *saved*.
- You will return to the *Items Awaiting Contract* listing screen.

LINK A SINGLE ITEM TO A NEW CONTRACT

- 1. In the *Items Awaiting Contract for Call* screen, click on the single item 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 *2020-00008* 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 items(s) to a new contract?



6. Click on Yes.



• The *Select a contract type for the new contract* screen will pop up.

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- *Click anywhere* in the *row* of the *contract type* you wish to add.
- Click on OK.
 - In this image, CPC Cost Per Copy has been selected



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

- 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



Calls - Awaiting Contract

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- 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



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- 1. You can input relevant data for the Part Item frame.
- 2. Add the relevant contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel, (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- 3. Click on *Save*.



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- 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

 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 <u>more than one item</u> on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

- 2. *Drag* the items to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
- 3. In this image, serial no's *2020-00006* and *2020-00007* have been selected, dragged and dropped on 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 items(s) to a new contract?



6. Click on Yes.

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• The *Select a contract type for the new contract* screen will pop up.

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- *Click anywhere* in the *row* of the *contract type* you wish to add.
- Click on OK.

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• In this image, *CPC* - Cost Per Copy has been selected

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

- The items that 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



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- 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



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- 1. You can input relevant data for the Parts Item frames.
- Add the *new* contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- 3. Click on *Save*.



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- 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.122.042