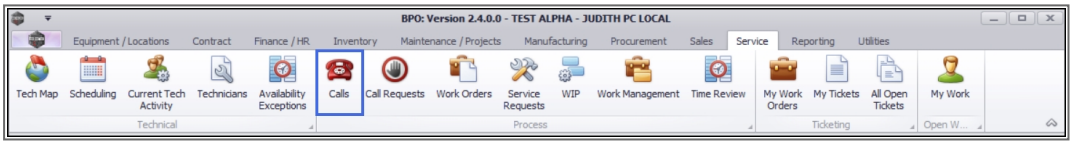
SERVICE

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*



- The ***Call Listing*** screen will be displayed.
- Select the call with the item you wish to put on contract and click on ***Edit***.

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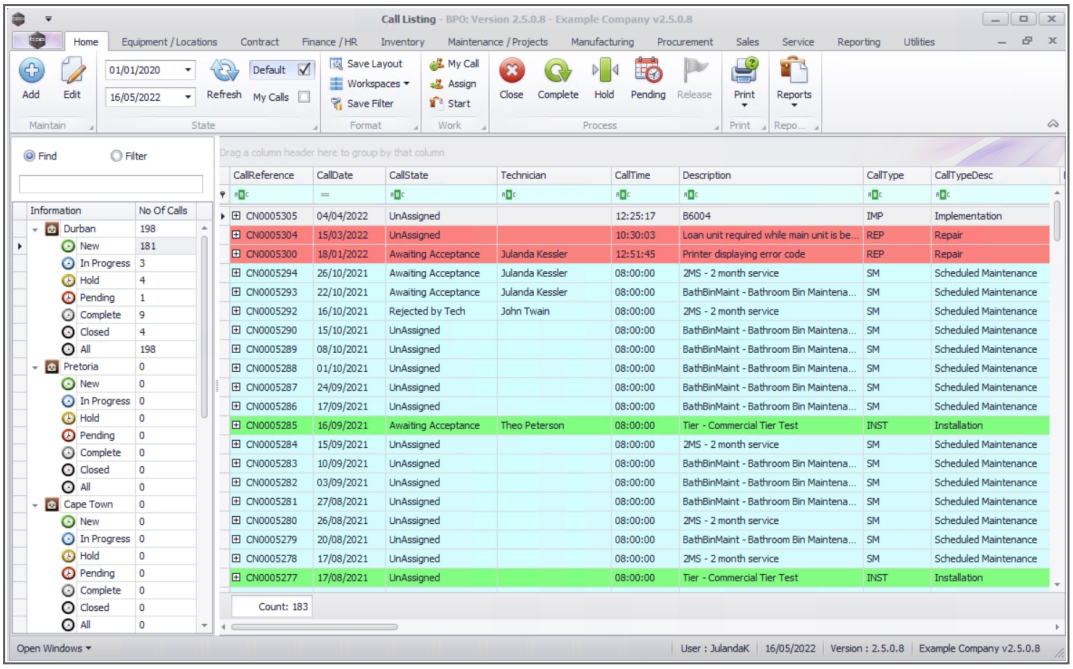
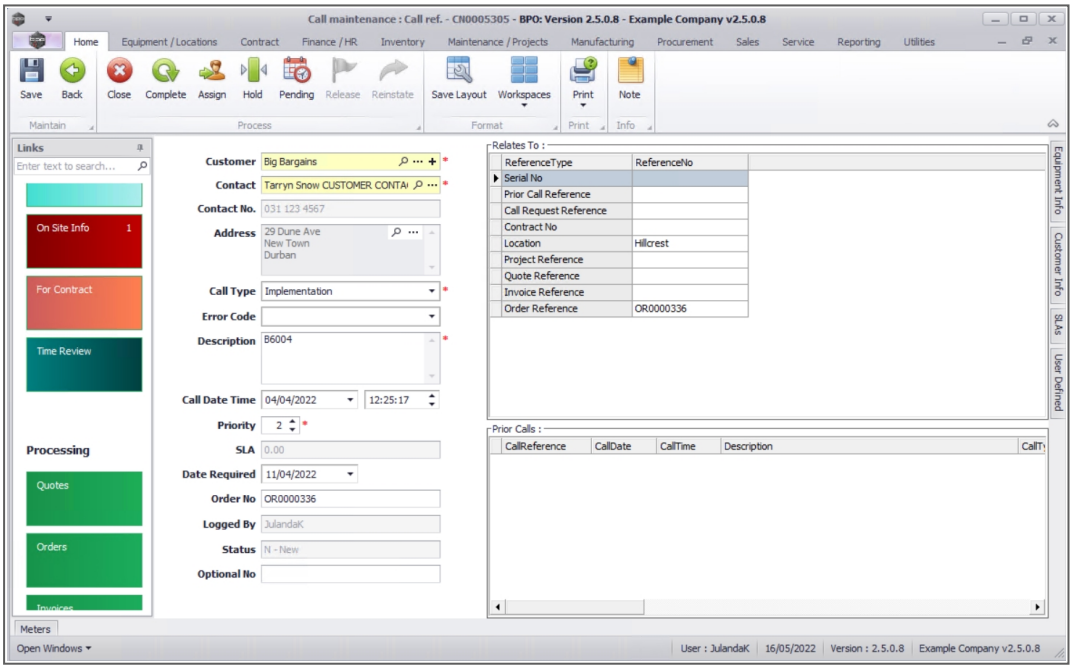


- The ***Call Maintenance*** screen will be displayed.
- Click on the ***For Contract*** tile.



- The ***Items Awaiting Contract for Call [ ]*** screen will be displayed.
- The screen is divided into **2** data grids.

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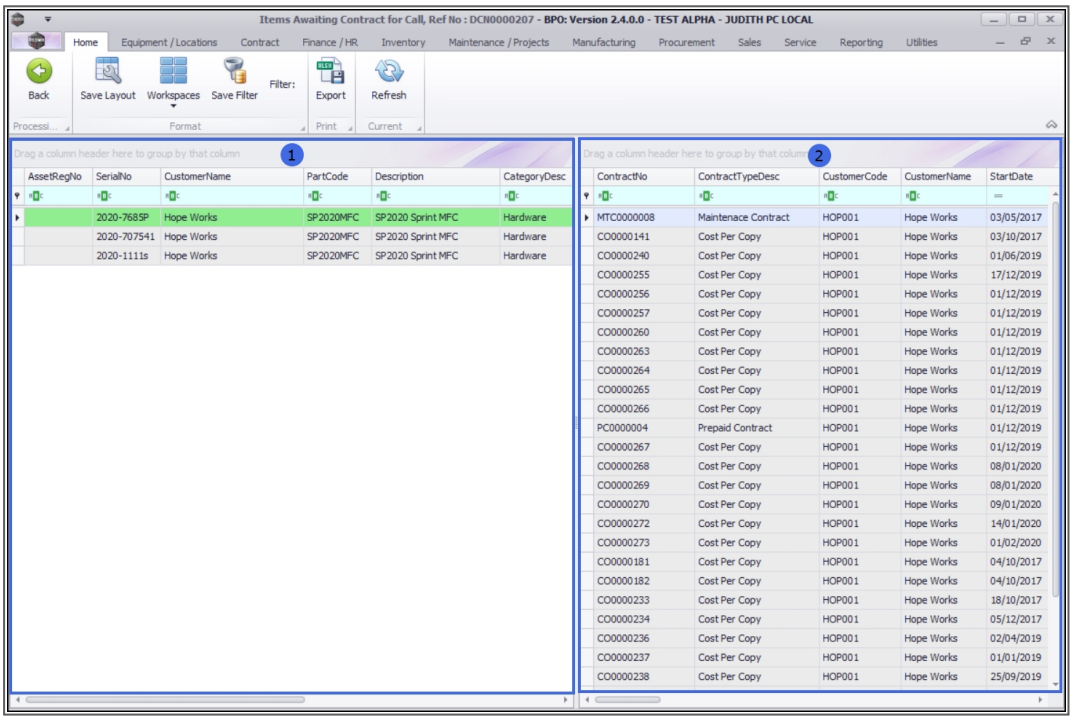
1. **Data grid 1:** displays all the items linked to the selected call ***waiting*** to be allocated to a contract. These items can either be ***client*** assets or ***internal*** assets. For internal assets to be displayed, a New Deal Rental process has to be completed first.
2. **Data grid 2:** displays all the existing contracts for the ***customer*** linked to the call.
    - ***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

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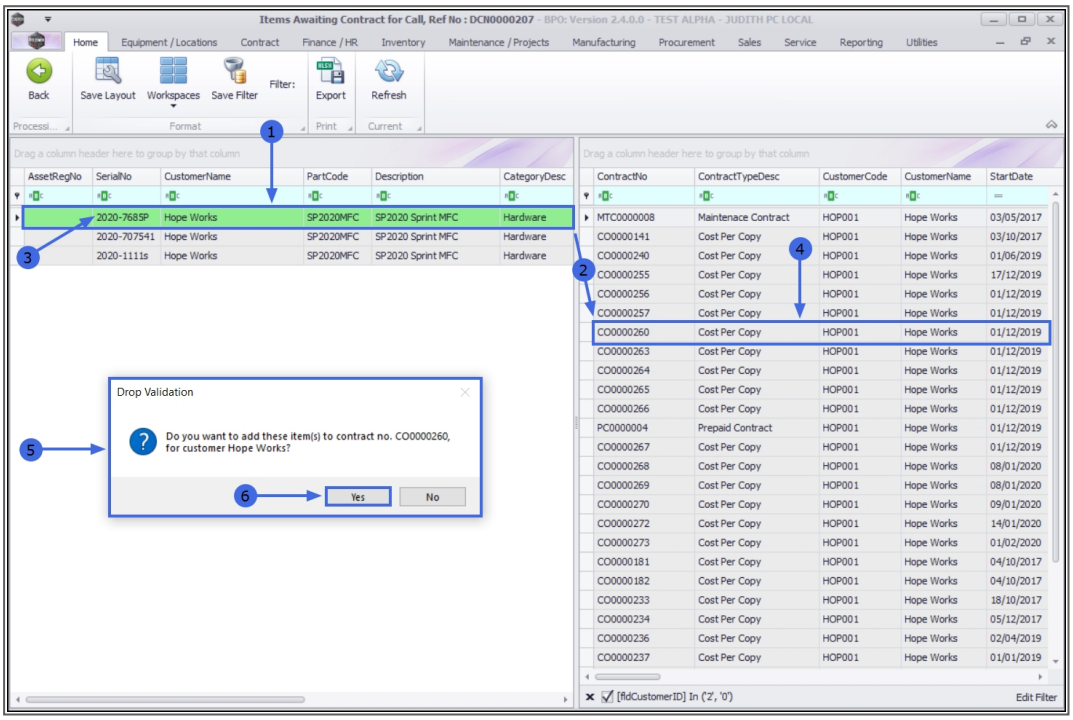
4. Contract no. **CO0000260** .
5. As it is 'dropped', a ***Drop Validation*** message box will pop up asking;
    - ***Do you want to add these items(s) to contract no. [ ], for customer [ ]?***
6. Click on ***Yes***.



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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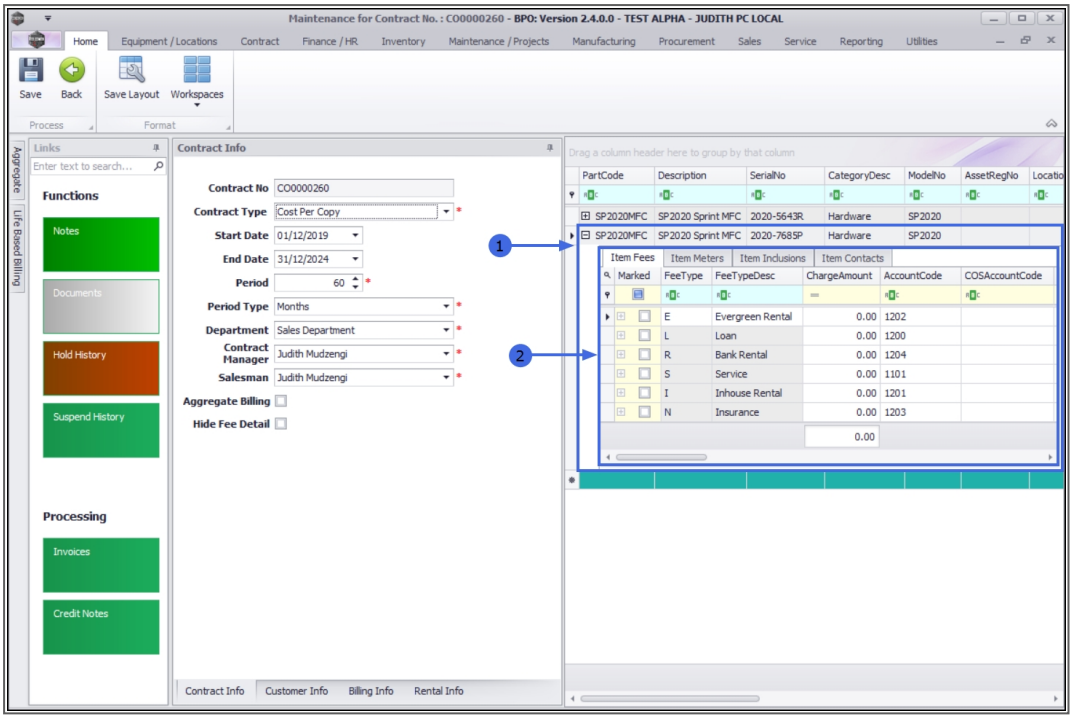

In this screen,

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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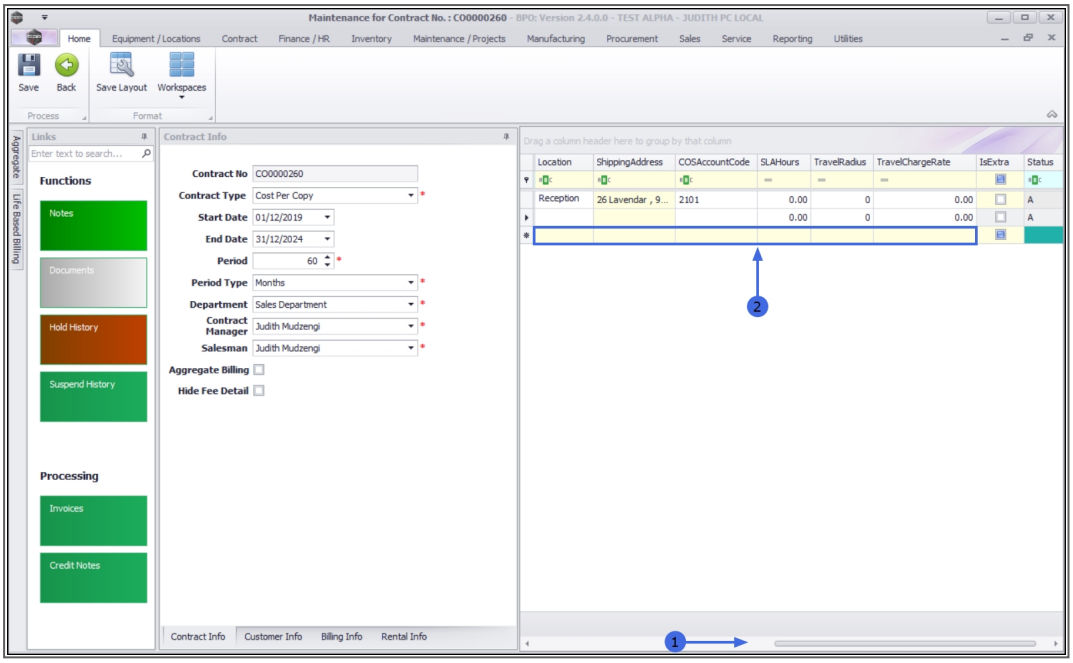
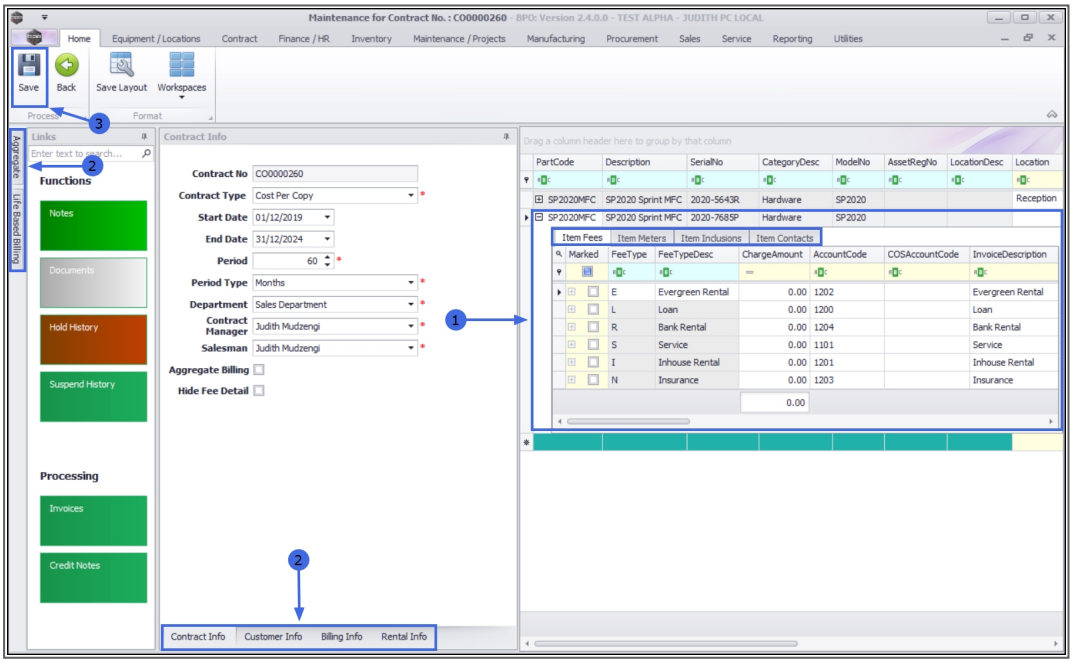


1. You can input relevant data for the Part Item frames.
2. Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.
3. Click on ***Save***.



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- 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

1. 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 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. ***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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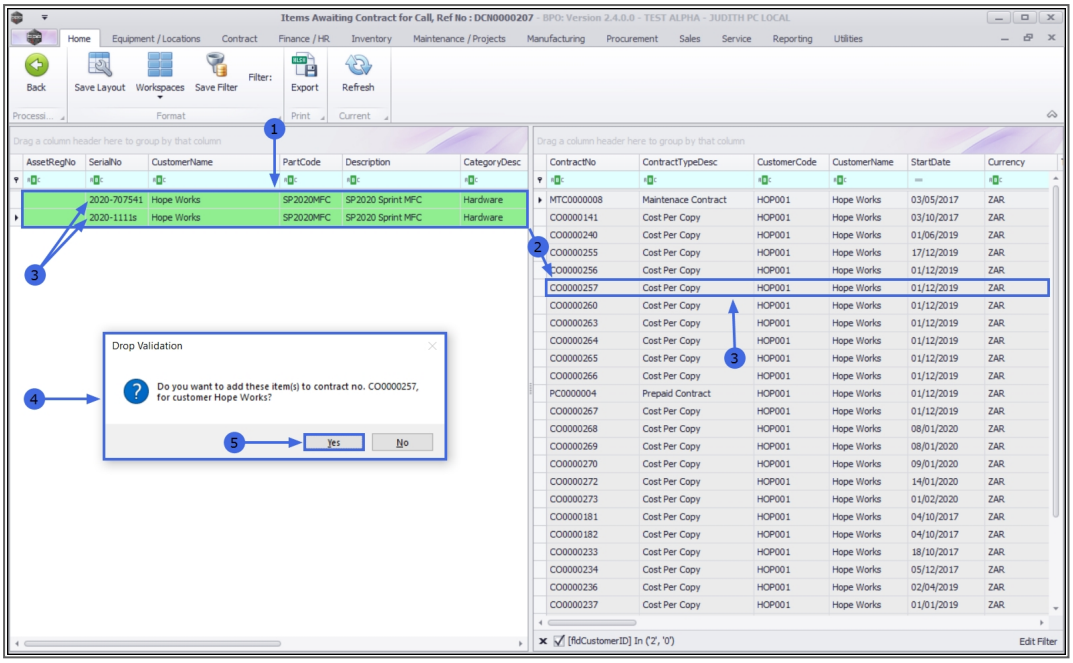

The ***Maintenance for Contract No [ ]*** screen will be displayed.

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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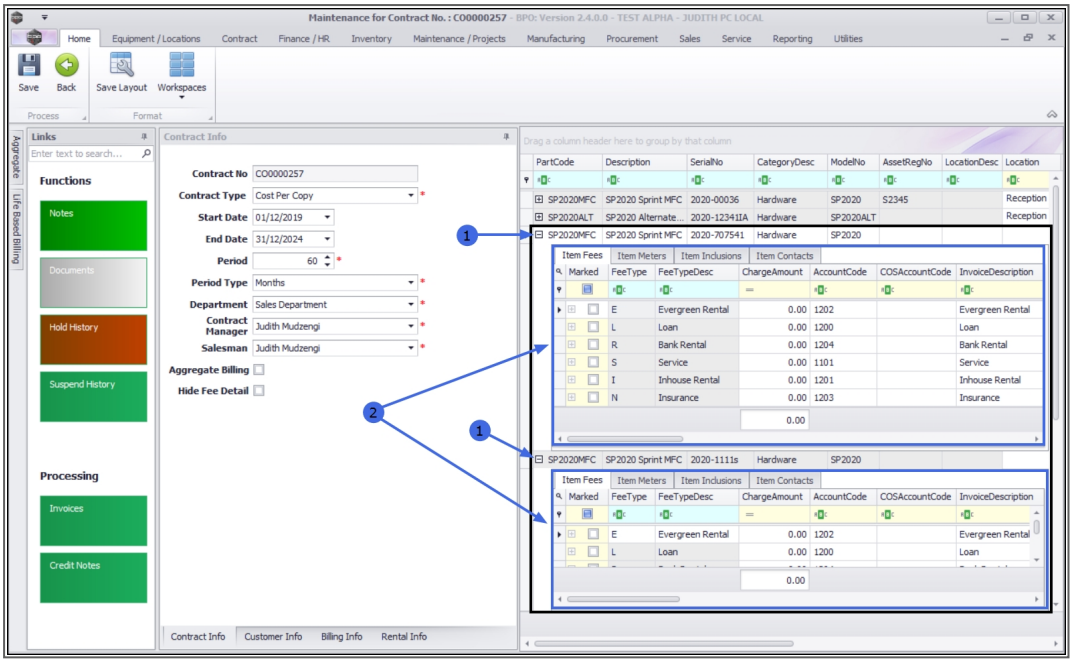

In this screen,

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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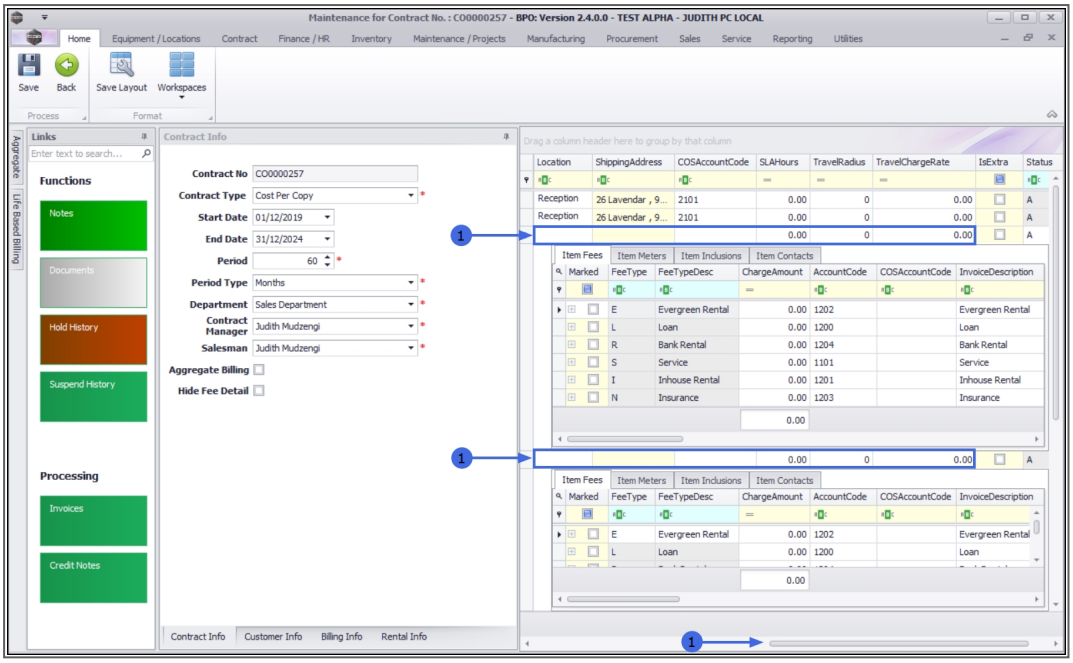
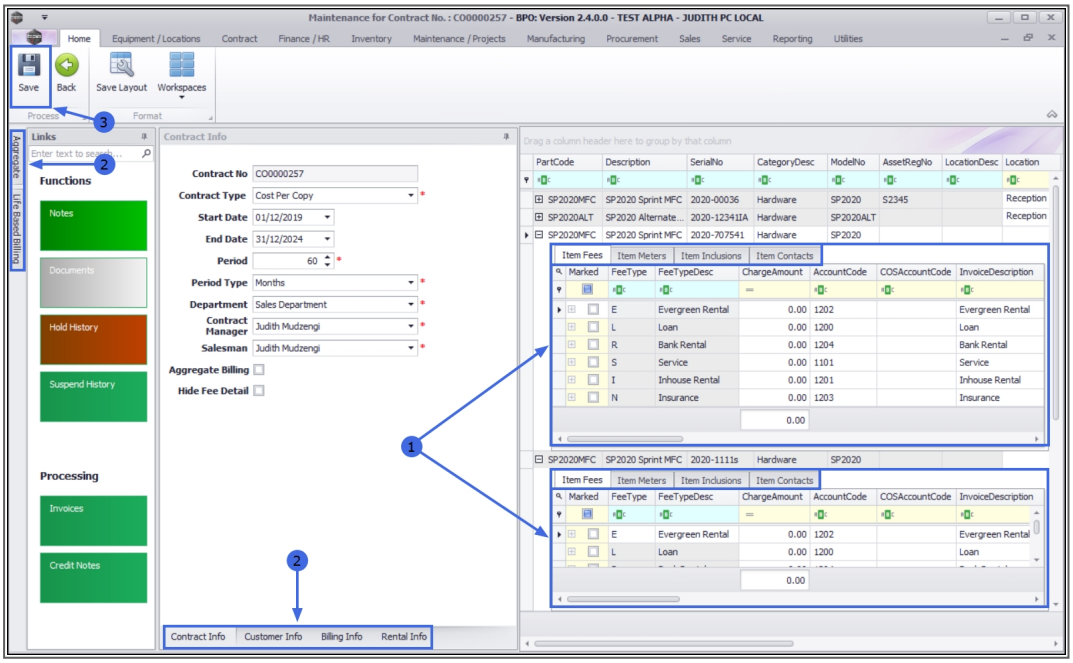


1. You can input relevant data for the Parts (Equipment Item) frame.
2. Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.
3. Click on ***Save***.



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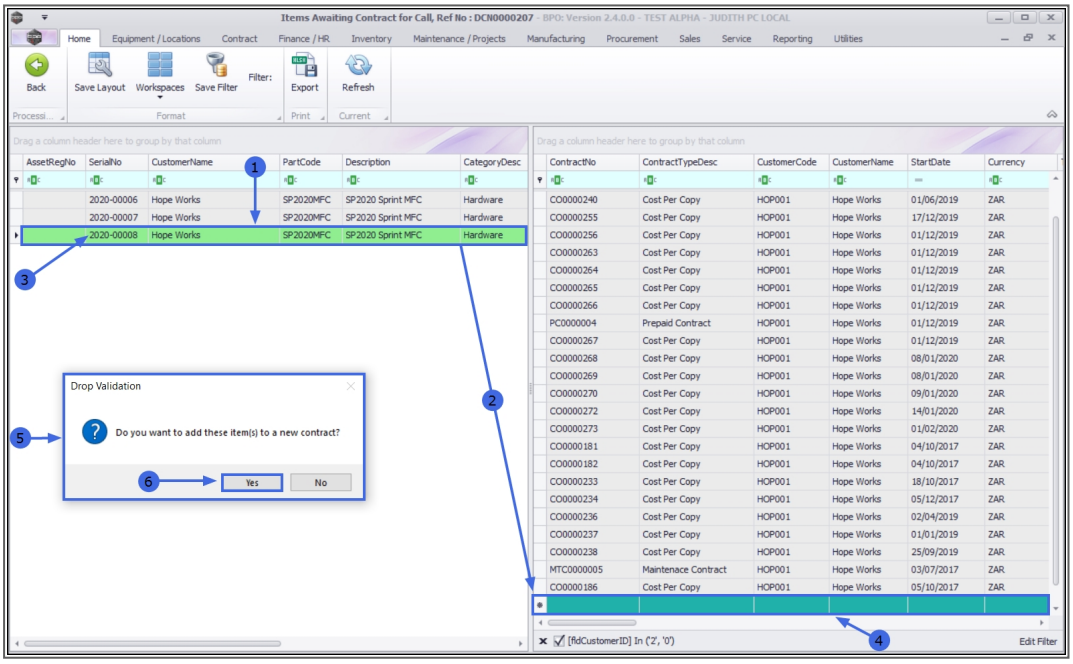
- The items will be linked to the ***existing*** contract and the contract details will be ***saved***.
- You will return to the ***Items Awaiting Contract*** listing screen.

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*** .



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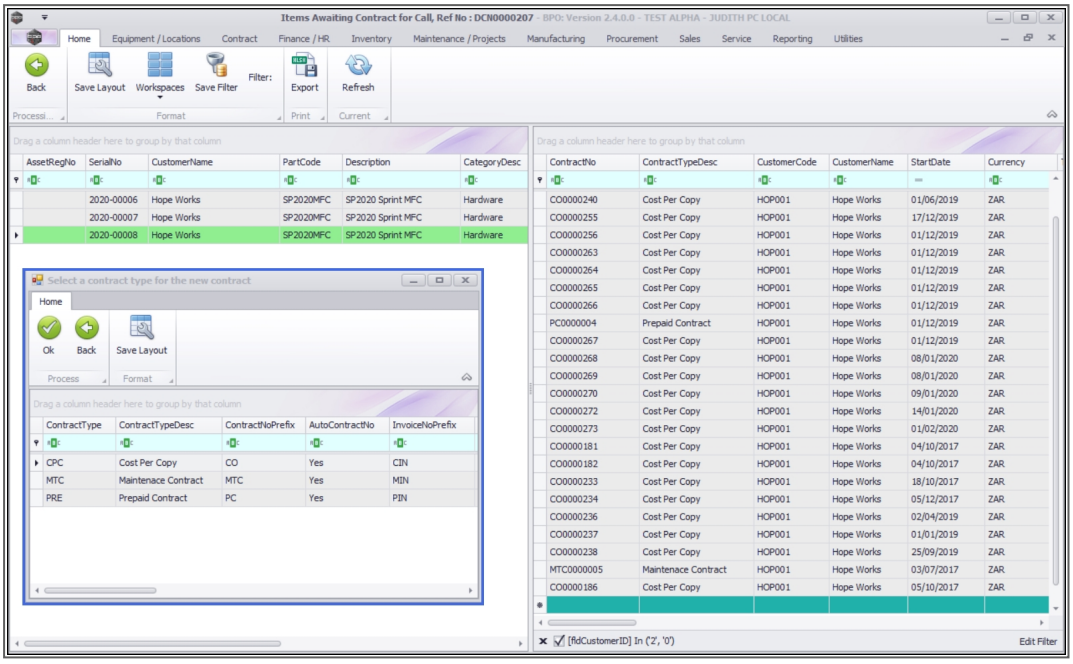
- The ***Select a contract type for the new contract*** screen will pop up.



- ***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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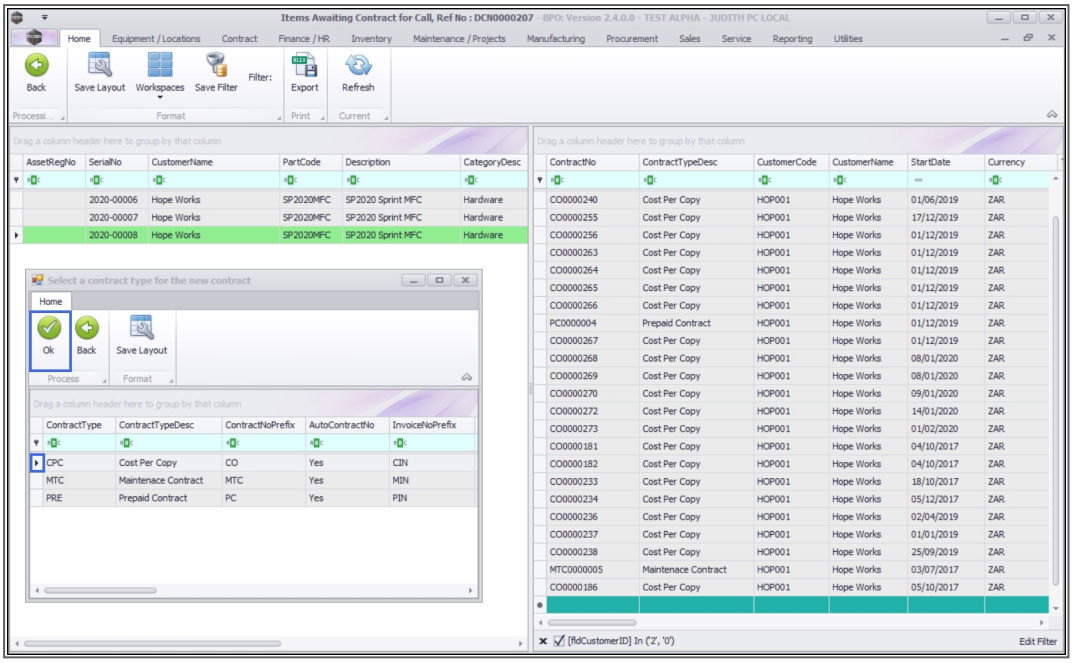

The ***Add a new contract*** screen will be displayed.

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

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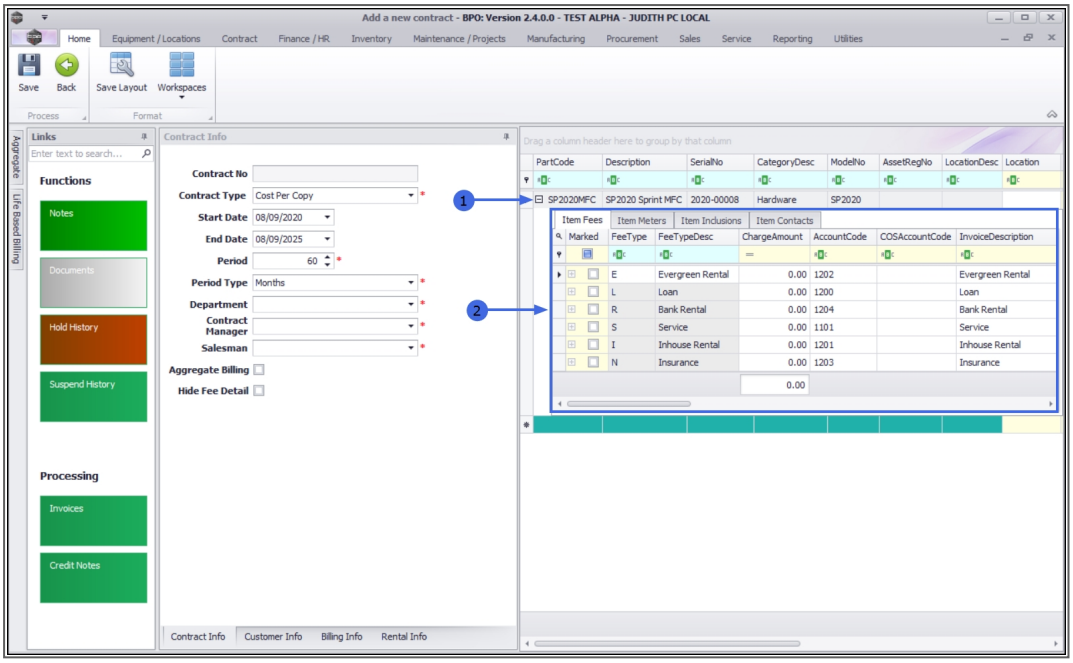

In this screen,

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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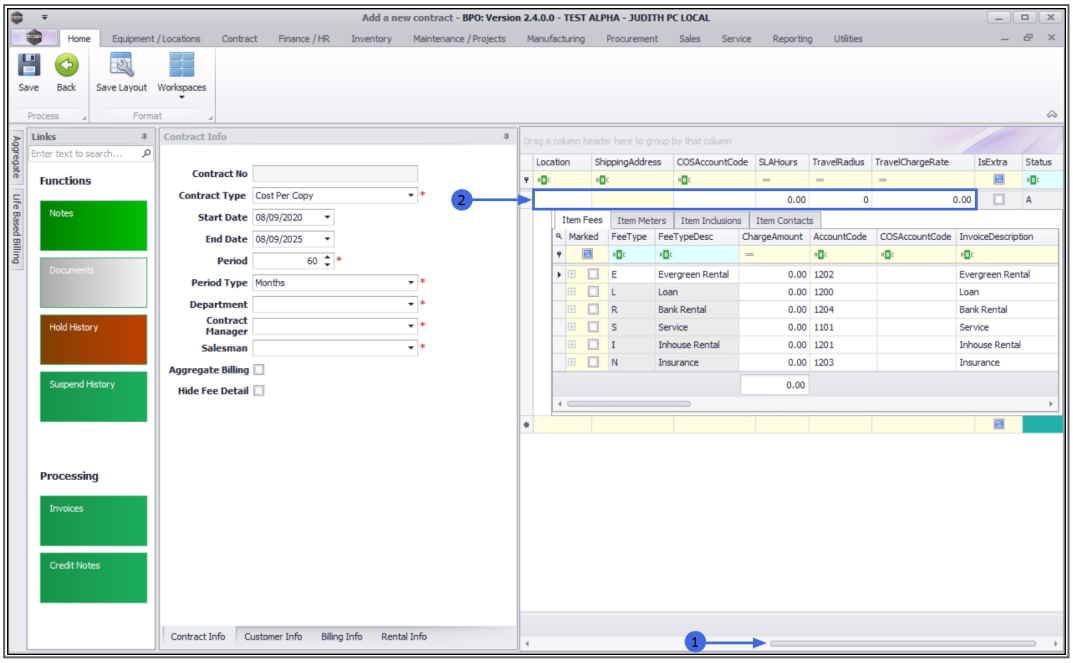

1. You can input relevant data for the Part Item frame.
2. Add the relevant contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel, (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be auto-populated but you can change them.
3. Click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

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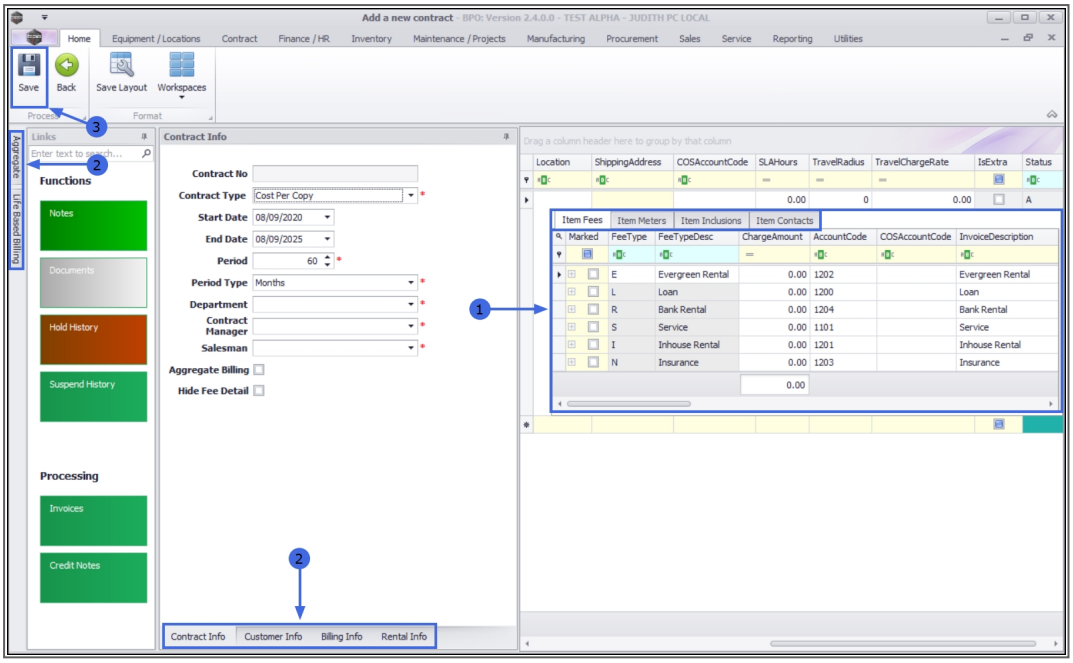

- The item will be linked to the ***new*** contract and the contract details will be ***saved***.
- You will return to the ***Items Awaiting Contract*** listing screen.

LINK MULTIPLE ITEMS TO A NEW CONTRACT

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. ***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?***

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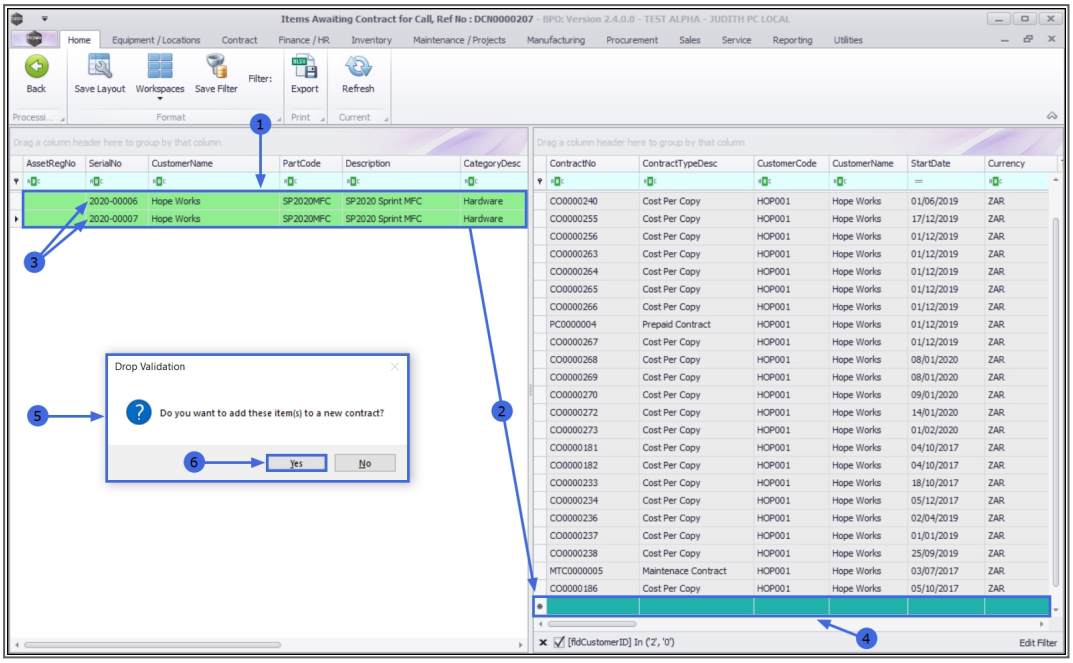
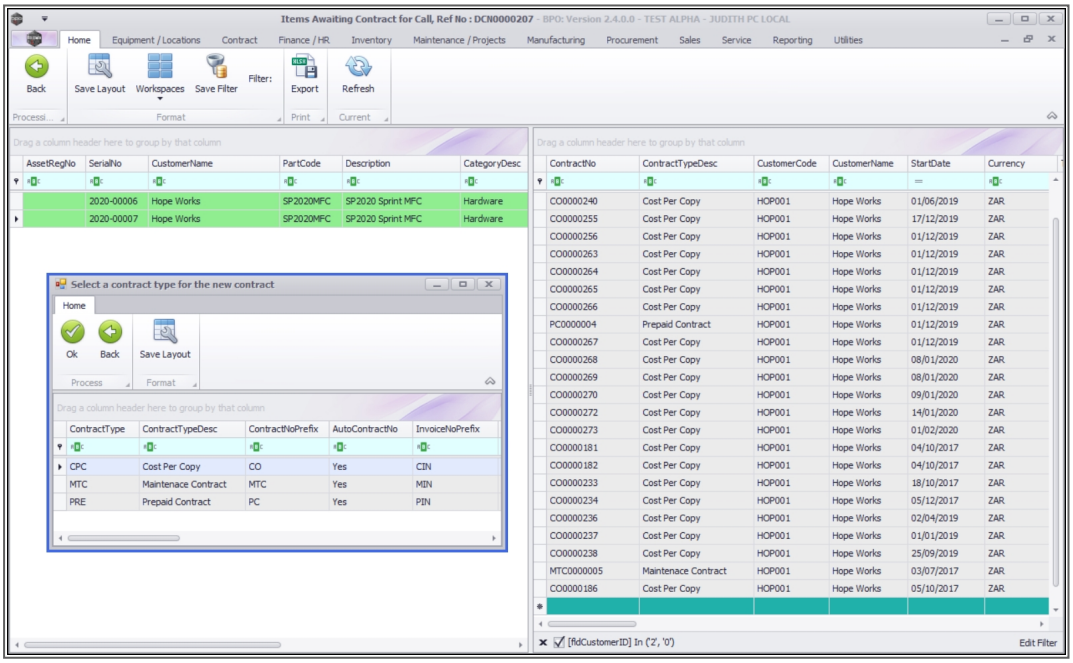
6. Click on ***Yes***.



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



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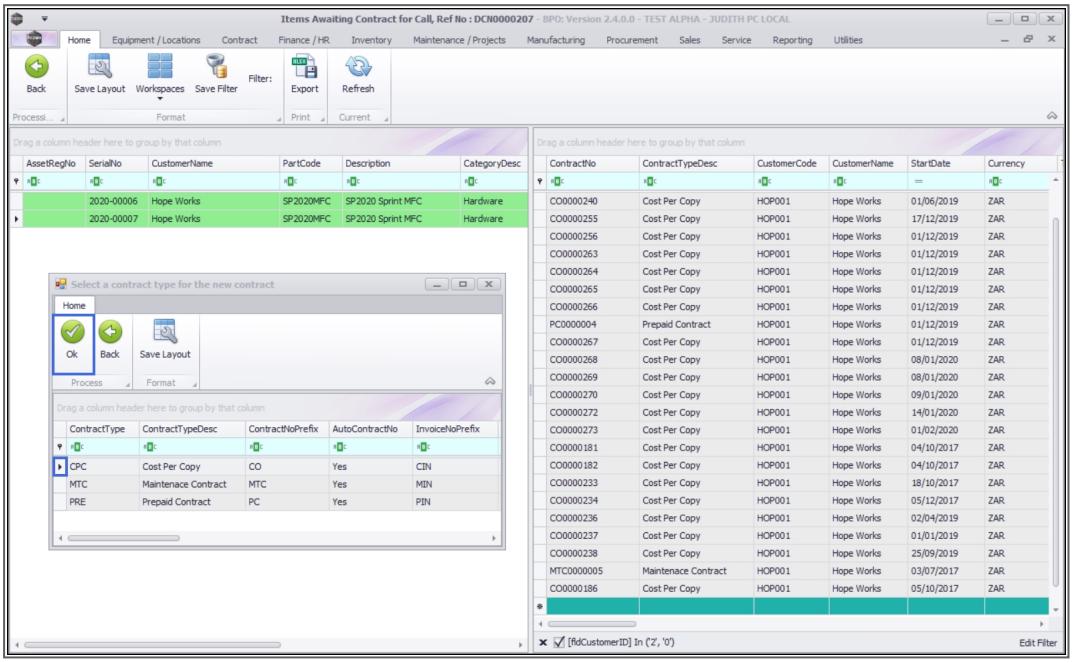
- ***Click anywhere*** in the ***row*** of the ***contract type*** you wish to add.
- Click on ***OK***.
    - In this image, ***CPC*** - Cost Per Copy has been selected



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

1. 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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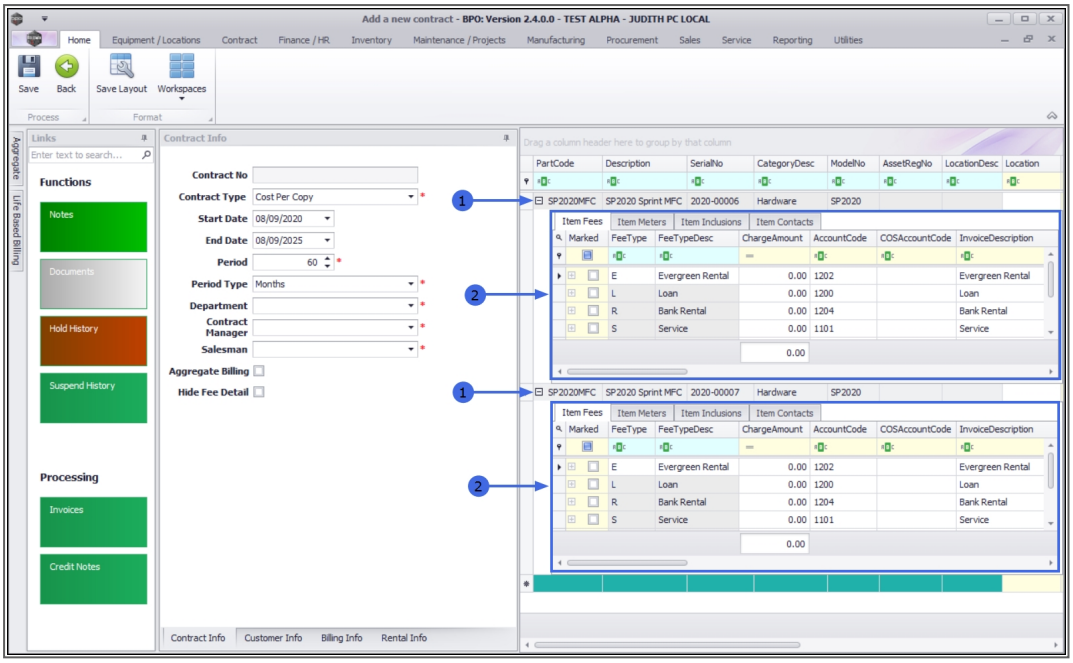

In this screen,

1. Scroll right to view all the contract items information.
2. You can update /edit the following fields:
    - Link a Location
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    - Link a SLA Hours
    - Link a Travel Radius
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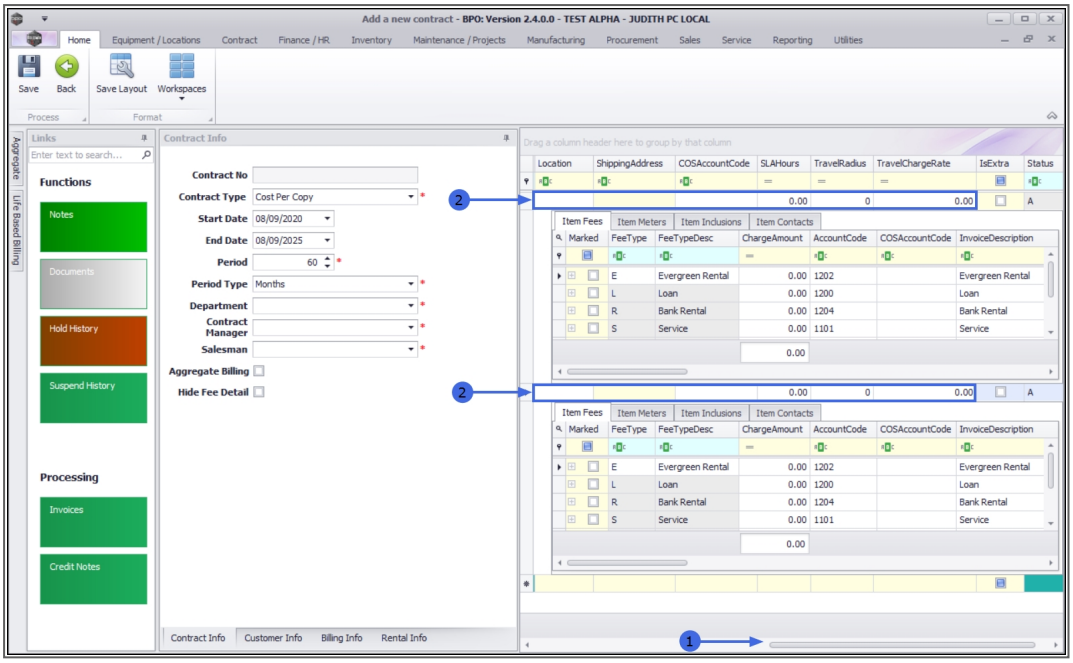

1. You can input relevant data for the Parts Item frames.
2. Add the ***new*** contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be auto-populated but you can change them.
3.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

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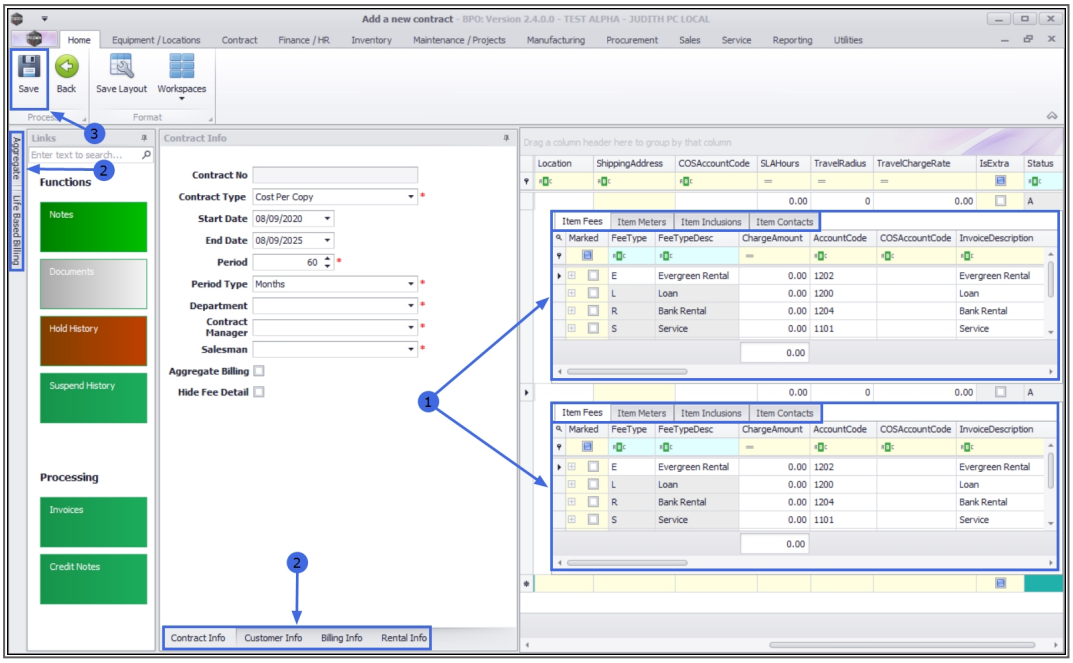

- The items will be linked to the ***new*** contract and the contract details will be ***saved***.
- You will return to the ***Items Awaiting Contract*** listing screen.

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