

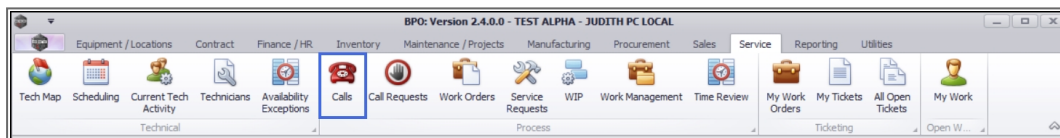
SERVICE

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***.

Call Listing - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

01/01/2020 16/05/2022 Default Refresh My Calls Save Layout Workspaces Save Filter

Find Filter

Information No Of Calls

- Durban 198
 - New 181
 - In Progress 3
 - Hold 4
 - Pending 1
 - Complete 9
 - Closed 4
 - All 198
- Pretoria 0
 - New 0
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 0
 - Closed 0
 - All 0
- Cape Town 0
 - New 0
 - In Progress 0
 - Hold 0
 - Pending 0
 - Complete 0
 - Closed 0
 - All 0

Count: 183

CallReference	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc
CH0005305	04/04/2022	UnAssigned		12:25:17	B6004	IMP	Implementation
CH0005304	15/03/2022	UnAssigned		10:30:03	Loan unit required while main unit is be...	REP	Repair
CH0005300	18/01/2022	Awaiting Acceptance	Julanda Kessler	12:51:45	Printer displaying error code	REP	Repair
CH0005294	26/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CH0005293	22/10/2021	Awaiting Acceptance	Julanda Kessler	08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005292	16/10/2021	Rejected by Tech	John Twain	08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CH0005290	15/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005289	08/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005288	01/10/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005287	24/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005286	17/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005285	16/09/2021	Awaiting Acceptance	Theo Peterson	08:00:00	Tier - Commercial Tier Test	INST	Installation
CH0005284	15/09/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CH0005283	10/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005282	03/09/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005281	27/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005280	26/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CH0005279	20/08/2021	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintena...	SM	Scheduled Maintenance
CH0005278	17/08/2021	UnAssigned		08:00:00	ZMS - 2 month service	SM	Scheduled Maintenance
CH0005277	17/08/2021	UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation

User : JulandaK 16/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8

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

Call maintenance : Call ref. - CH0005305 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Close Complete Assign Hold Pending Release Reinstate Save Layout Workspaces Print Note

Links Enter text to search...

On Site Info

For Contract

Time Review

Processing

Quotes

Orders

Invoices

Meters

Customer: Big Bargains

Contact: Tarryn Show CUSTOMER CONTAI

Contact No.: 031 123 4567

Address: 29 Dune Ave New Town Durban

Call Type: Implementation

Error Code:

Description: B6004

Call Date Time: 04/04/2022 12:25:17

Priority: 2

SLA: 0.00

Date Required: 11/04/2022

Order No: OR0000336

Logged By: JulandaK

Status: N - New

Optional No:

Relates To:

ReferenceType	ReferenceNo
Serial No	
Prior Call Reference	
Call Request Reference	
Contract No	
Location	Hillcrest
Project Reference	
Quote Reference	
Invoice Reference	
Order Reference	OR0000336

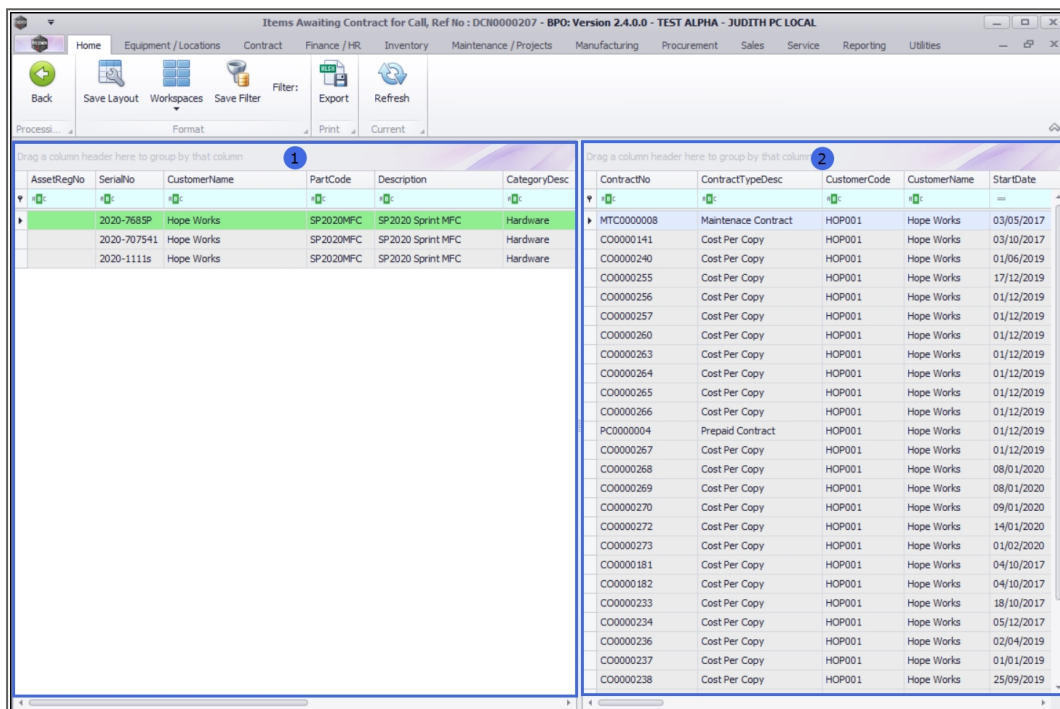
Prior Calls:

CallReference	CallDate	CallTime	Description	CallT
---------------	----------	----------	-------------	-------

User : JulandaK 16/05/2022 Version : 2.5.0.8 Example Company v2.5.0.8

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

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.



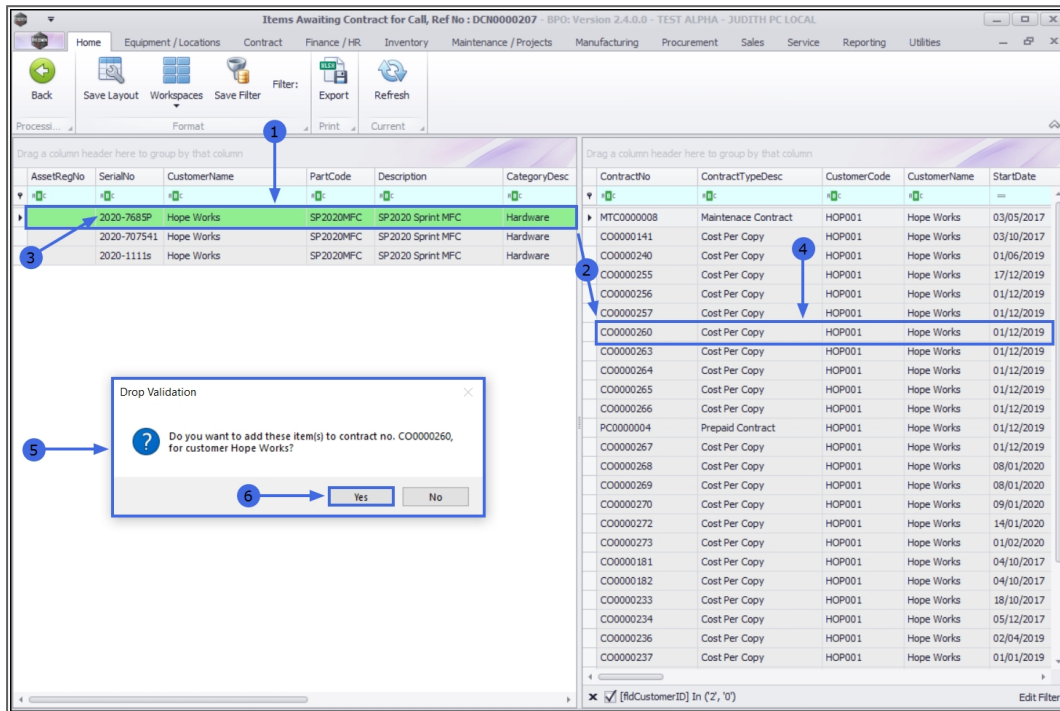
AssetRegNo	SerialNo	CustomerName	PartCode	Description	CategoryDesc
2020-7685P		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-707541		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-1111s		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware

ContractNo	ContractTypeDesc	CustomerCode	CustomerName	StartDate
MTC00000008	Maintenace Contract	HOP001	Hope Works	03/05/2017
CO0000141	Cost Per Copy	HOP001	Hope Works	03/10/2017
CO0000240	Cost Per Copy	HOP001	Hope Works	01/06/2019
CO0000255	Cost Per Copy	HOP001	Hope Works	17/12/2019
CO0000256	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000257	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000260	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000263	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000264	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000265	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000266	Cost Per Copy	HOP001	Hope Works	01/12/2019
PC0000004	Prepaid Contract	HOP001	Hope Works	01/12/2019
CO0000267	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000268	Cost Per Copy	HOP001	Hope Works	08/01/2020
CO0000269	Cost Per Copy	HOP001	Hope Works	08/01/2020
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	04/10/2017
CO0000182	Cost Per Copy	HOP001	Hope Works	04/10/2017
CO0000233	Cost Per Copy	HOP001	Hope Works	18/10/2017
CO0000234	Cost Per Copy	HOP001	Hope Works	05/12/2017
CO0000236	Cost Per Copy	HOP001	Hope Works	02/04/2019
CO0000237	Cost Per Copy	HOP001	Hope Works	01/01/2019
CO0000238	Cost Per Copy	HOP001	Hope Works	25/09/2019

LINK A SINGLE ITEM TO AN EXISTING CONTRACT

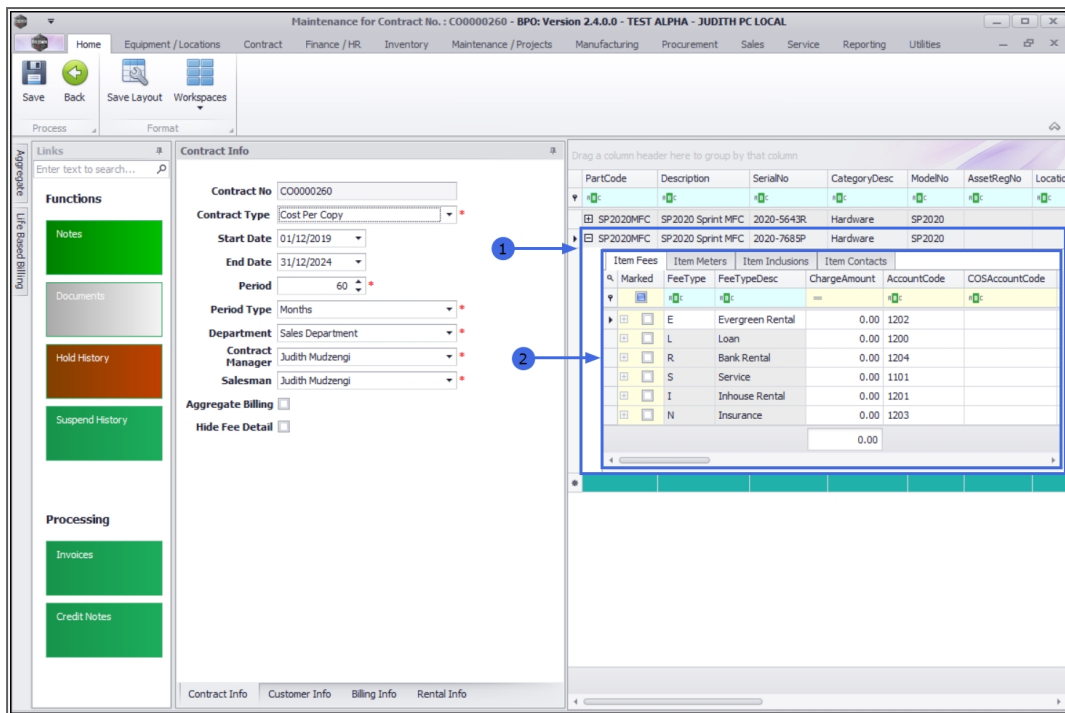
1. **Click** and **hold** on the contract item in data grid **1**, that you wish to add to an existing contract.
2. **Drag** the contract item to an existing contract displayed in data grid **2**.
3. In this image, serial no. **2020-7685P** has been selected, and will be dragged and dropped onto

4. Contract no. **CO0000260** .
5. As it is 'dropped', a **Drop Validation** message box will pop up asking;
 - **Do you want to add these item(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**



Contract Info

Contract No: C00000260

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☐

Hide Fee Detail: ☐

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	Locat
SP2020MFC	SP2020 Sprint MFC	2020-5643R	Hardware	SP2020		
SP2020MFC	SP2020 Sprint MFC	2020-768SP	Hardware	SP2020		

Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode
Marked	FeeType	FeeTypeDesc	ChargeAmount		
	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	
			0.00		

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**

Contract Info

Contract No: CO0000260

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☐

Hide Fee Detail: ☐

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
Reception	26 Lavendar , 9	2101	0.00	0	0.00	<input type="checkbox"/>	A
			0.00	0	0.00	<input type="checkbox"/>	A

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**.

Contract Info

Contract No: CO0000260

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☐

Hide Fee Detail: ☐

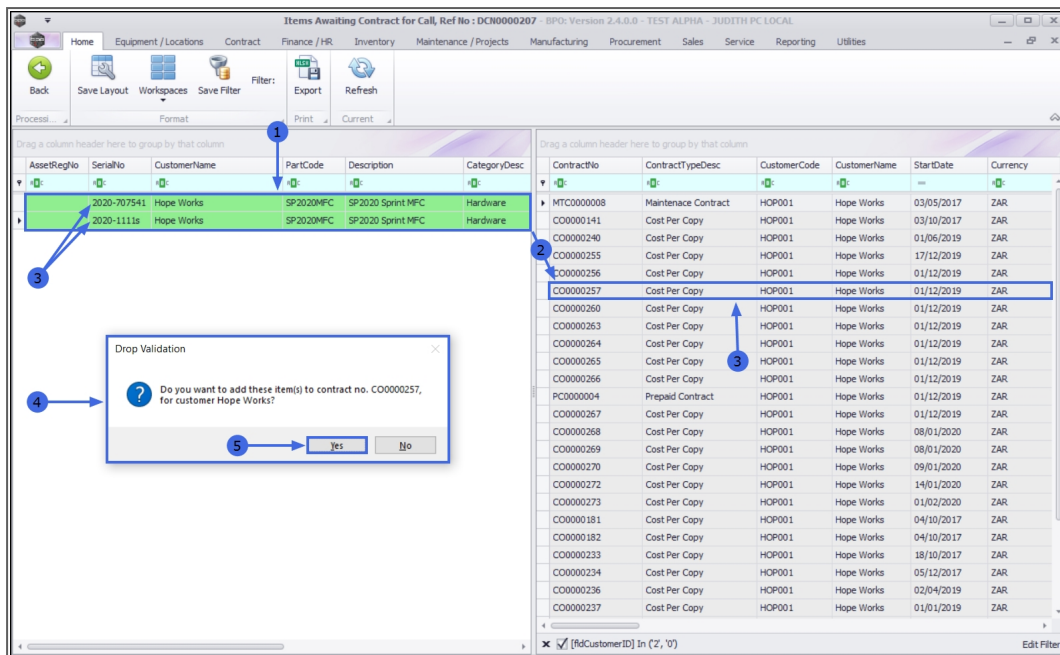
PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
SP 2020MPC	SP 2020 Sprint MFC	2020-5643R	Hardware	SP 2020			Reception
SP 2020MPC	SP 2020 Sprint MFC	2020-7685P	Hardware	SP 2020			

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAmount
<input type="checkbox"/>	E	Evergreen Rental	0.00
<input type="checkbox"/>	L	Loan	0.00
<input type="checkbox"/>	R	Bank Rental	0.00
<input type="checkbox"/>	S	Service	0.00
<input type="checkbox"/>	I	Inhouse Rental	0.00
<input type="checkbox"/>	N	Insurance	0.00

- 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.

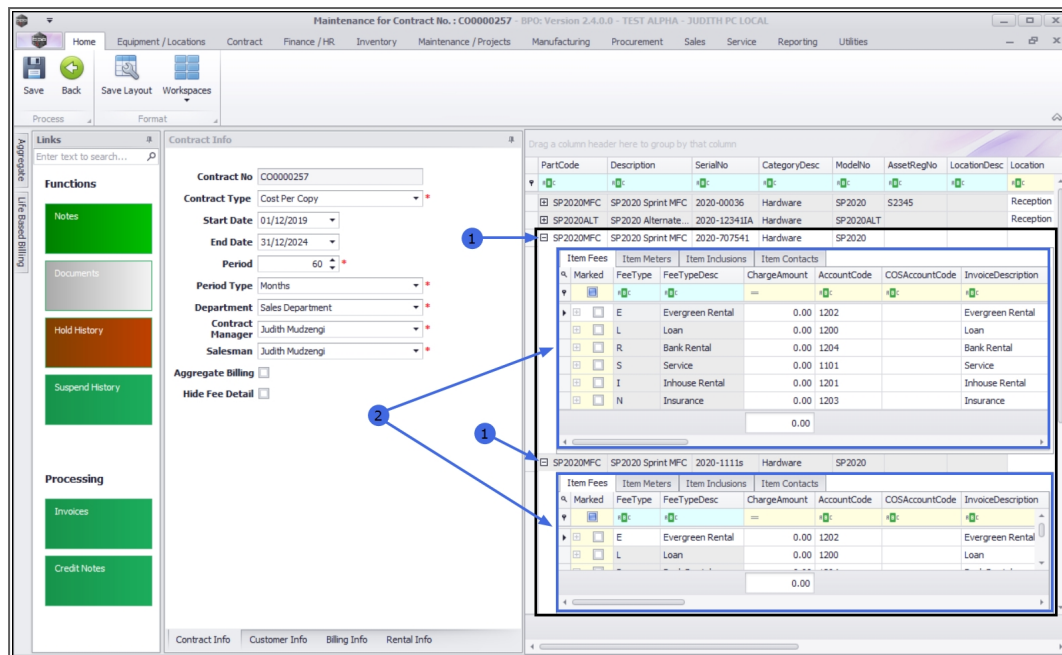
LINK MULTIPLE ITEMS TO AN EXISTING CONTRACT

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**.



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



In this screen,

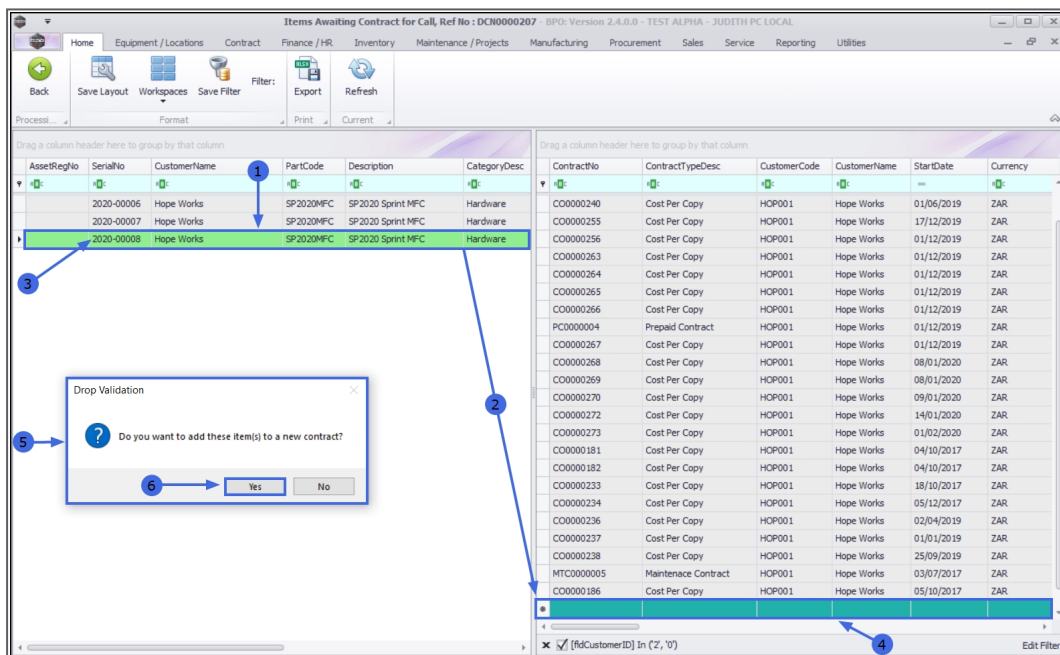
1. Scroll right to view all the contract item information.
2. You can update/edit the following fields:
 - Link a **Location**
 - Link a **Shipping Address**
 - Link a **COS Account Code**
 - Link a **SLA Hours**
 - Link a **Travel Radius**
 - Link a **Travel Charge**

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.

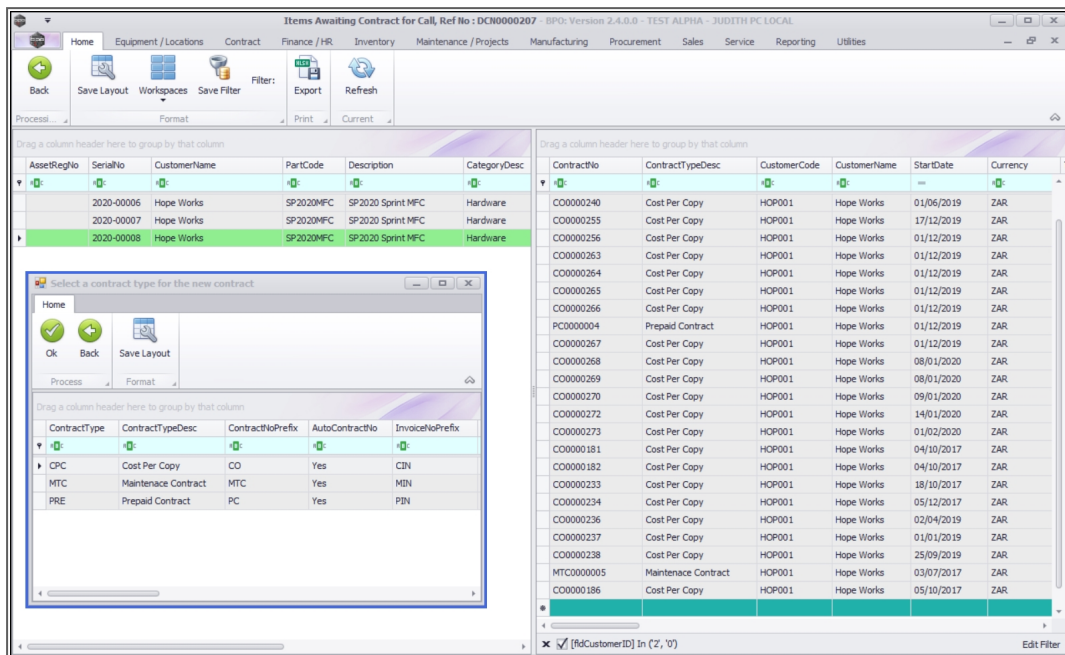
LINK A SINGLE ITEM TO A NEW CONTRACT

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**.

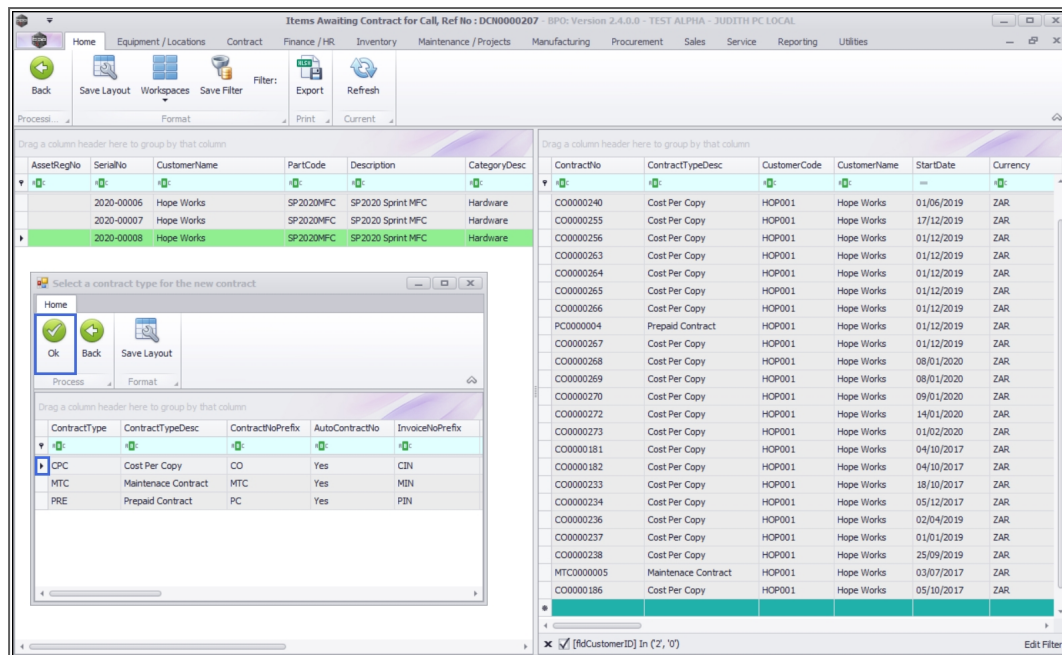


The screenshot shows the 'Items Awaiting Contract for Call' application window. The window has a menu bar with options: Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with icons for Back, Save Layout, Workspaces, Save Filter, Filter, Export, and Refresh. The main area contains two data grids. The left grid has columns: AssetRegNo, SerialNo, CustomerName, PartCode, Description, and CategoryDesc. The right grid has columns: ContractNo, ContractTypeDesc, CustomerCode, CustomerName, StartDate, and Currency. A 'Drop Validation' dialog box is open, asking 'Do you want to add these item(s) to a new contract?' with 'Yes' and 'No' buttons. Numbered arrows (1-6) indicate the steps: 1. Selecting item 2020-00008, 2. Dragging it to the bottom row of the right grid, 3. The item being dropped, 4. The item appearing in the bottom row, 5. The dialog box appearing, and 6. Clicking 'Yes'.

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

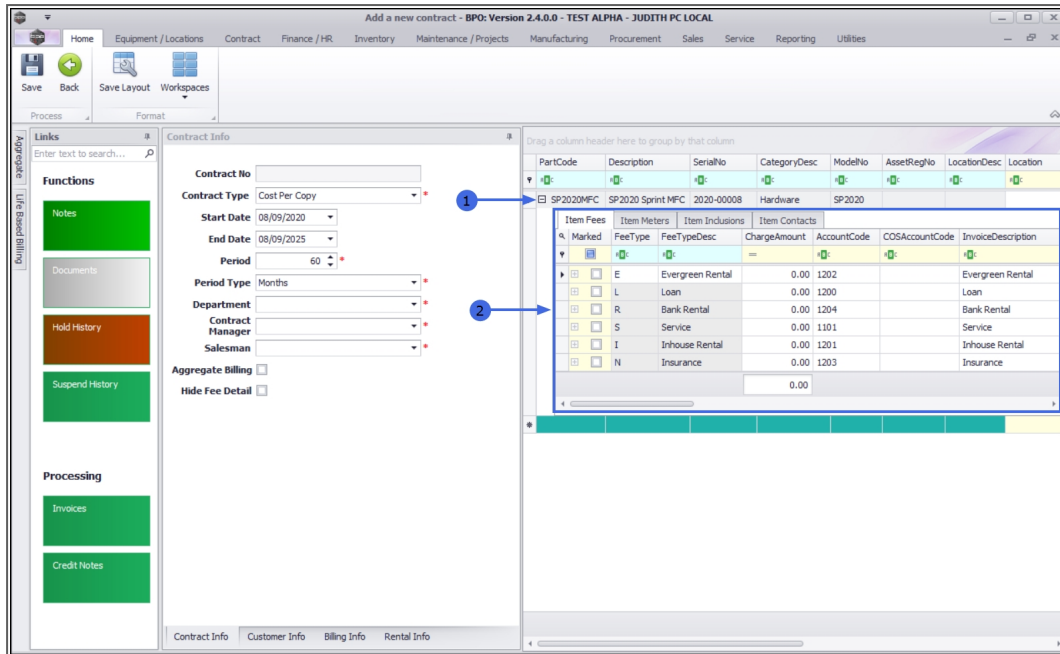


- Click anywhere in the **row** of the **contract type** you wish to add.
- Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected



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



Contract Info

Contract No:

Contract Type:

Start Date:

End Date:

Period:

Period Type:

Department:

Contract Manager:

Salesman:

Aggregate Billing: ☐

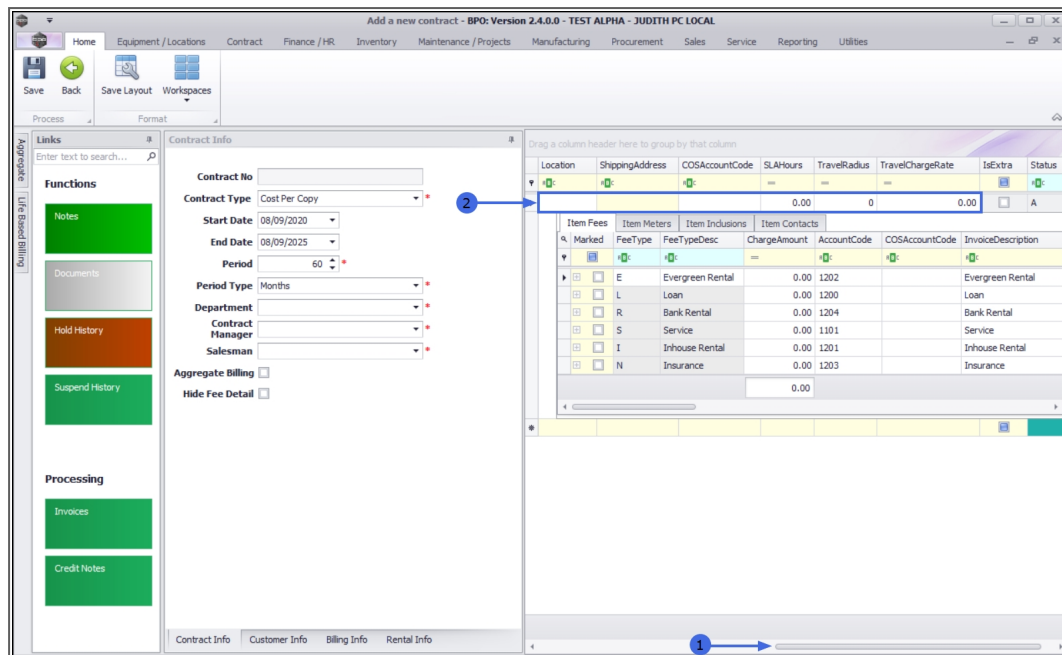
Hide Fee Detail: ☐

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
SP2020MPC	SP2020 Sprint MFC	2020-00008	Hardware	SP2020			

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

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**



Contract Info

Contract No:

Contract Type:

Start Date:

End Date:

Period:

Period Type:

Department:

Contract Manager:

Salesman:

Aggregate Billing: ☐

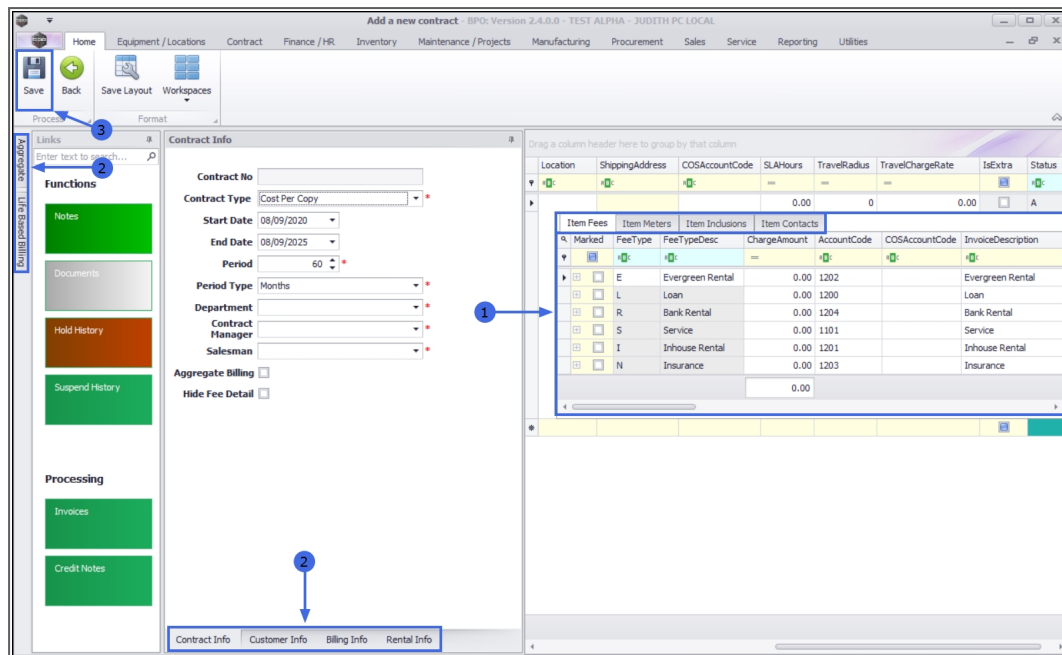
Hide Fee Detail: ☐

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
			0.00	0	0.00		A

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

Contract Info Customer Info Billing Info Rental Info

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**.



- 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 item(s) to a new contract?**

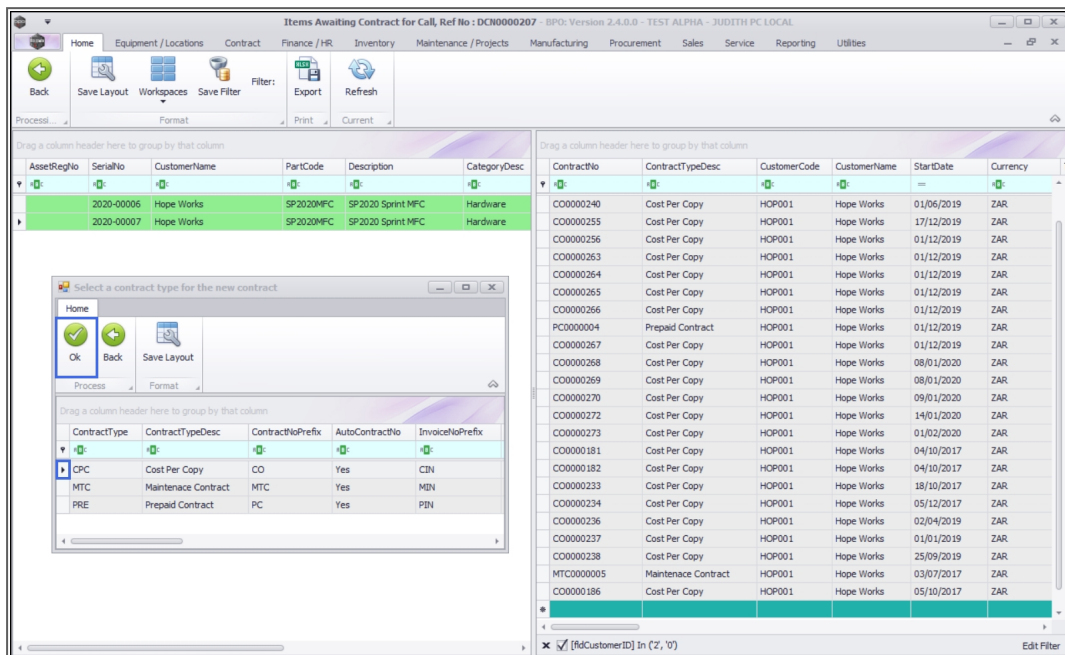
6. Click on **Yes**.

The screenshot shows the 'Items Awaiting Contract for Call' window. The left pane displays a table with columns: AssetRegNo, SerialNo, CustomerName, PartCode, Description, and CategoryDesc. Two items are listed for 'Hope Works' with part codes 'SP2020MFC' and 'SP2020 Sprint MFC'. The right pane shows a list of existing contracts with columns: ContractNo, ContractTypeDesc, CustomerCode, CustomerName, StartDate, and Currency. A 'Drop Validation' dialog box is open, asking 'Do you want to add these item(s) to a new contract?'. The dialog has 'Yes' and 'No' buttons. Numbered annotations indicate the following steps: 1. Click on the 'Contract' tab in the top menu. 2. Click on the 'ContractTypeDesc' column header in the right pane. 3. Click on the 'AssetRegNo' column header in the left pane. 4. Click on the 'ContractNo' column header in the right pane. 5. Click on the 'Drop Validation' dialog box. 6. Click on the 'Yes' button in the dialog box.

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

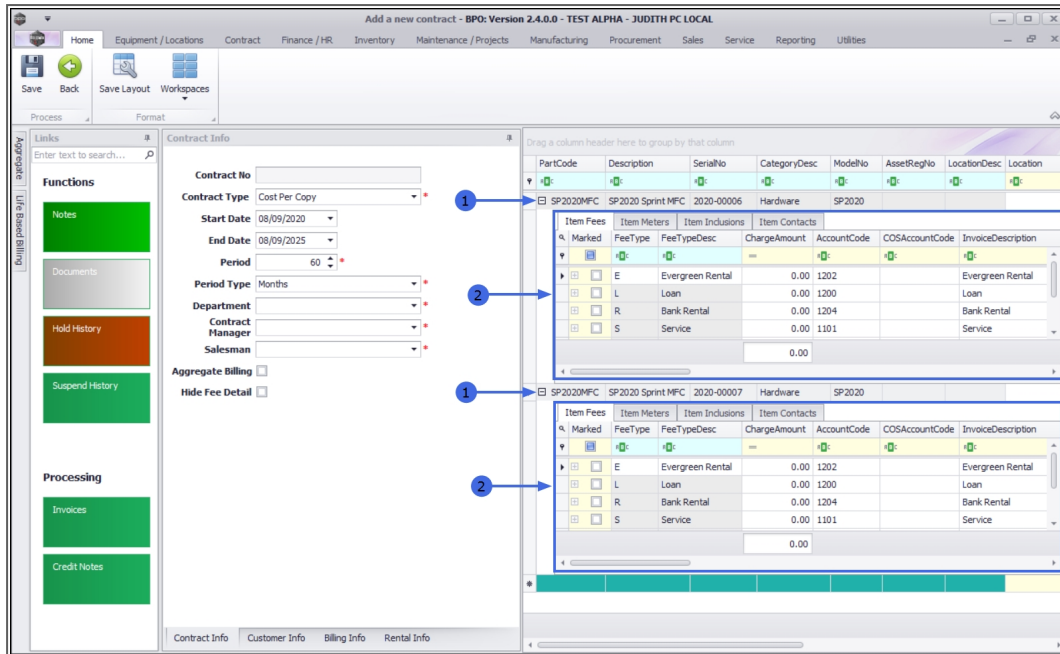
This screenshot shows the same 'Items Awaiting Contract for Call' window, but with the 'Select a contract type for the new contract' dialog box open. The dialog box has a 'Home' tab and a 'Process' tab. It contains a table with columns: ContractType, ContractTypeDesc, ContractNoPrefix, AutoContractNo, and InvoiceNoPrefix. The table lists three contract types: CPC (Cost Per Copy), MTC (Maintenance Contract), and PRE (Prepaid Contract). The 'Process' tab is active, and the 'ContractType' column is selected. The background window shows the same data as the previous screenshot.

- **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**



The screenshot shows the 'Add a new contract' screen in the CO3 Technologies software. The interface includes a top menu bar with options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A left sidebar contains 'Functions' (Notes, Documents, Hold History, Suspend History) and 'Processing' (Invoices, Credit Notes). The main content area is divided into 'Contract Info' and a table of contract items.

Contract Info:

- Contract No: [Text Field]
- Contract Type: Cost Per Copy
- Start Date: 08/09/2020
- End Date: 08/09/2025
- Period: 60
- Period Type: Months
- Department: [Dropdown]
- Contract Manager: [Dropdown]
- Salesman: [Dropdown]
- Aggregate Billing: ☐
- Hide Fee Detail: ☐

Contract Items Table:

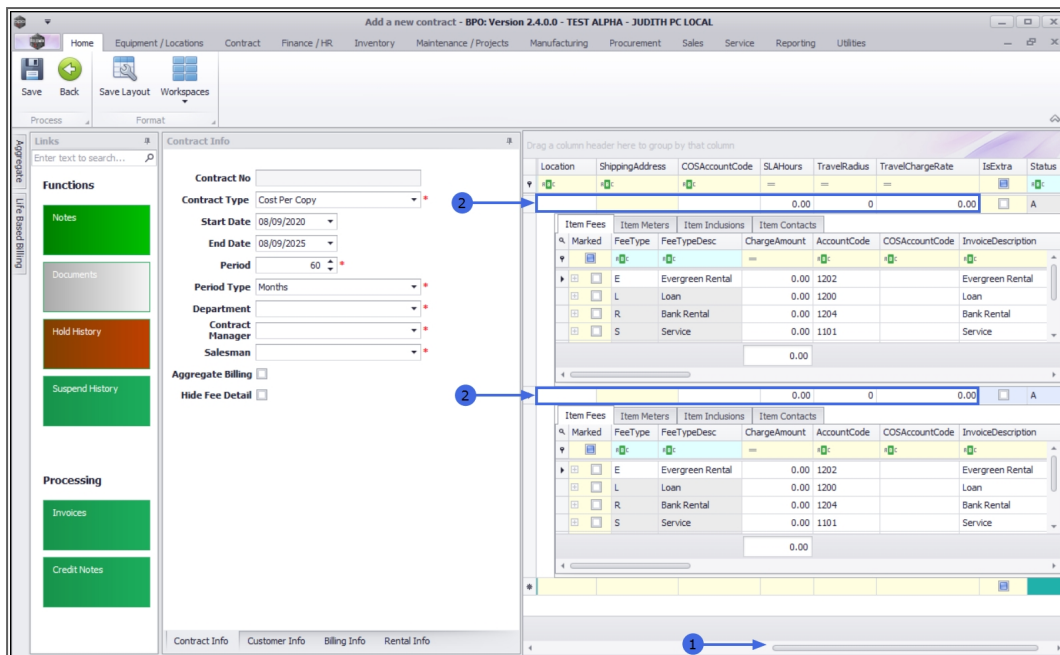
PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location																																																	
SP2020MPC	SP2020 Sprint MFC	2020-00006	Hardware	SP2020																																																				
<table border="1"> <thead> <tr> <th>Item Fees</th> <th>Item Meters</th> <th>Item Inclusions</th> <th>Item Contacts</th> <th>AccountCode</th> <th>COSAccountCode</th> <th>InvoiceDescription</th> </tr> <tr> <th>Marked</th> <th>FeeType</th> <th>FeeTypeDesc</th> <th>ChargeAmount</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>E</td> <td>Evergreen Rental</td> <td>0.00</td> <td>1202</td> <td></td> <td>Evergreen Rental</td> </tr> <tr> <td><input type="checkbox"/></td> <td>L</td> <td>Loan</td> <td>0.00</td> <td>1200</td> <td></td> <td>Loan</td> </tr> <tr> <td><input type="checkbox"/></td> <td>R</td> <td>Bank Rental</td> <td>0.00</td> <td>1204</td> <td></td> <td>Bank Rental</td> </tr> <tr> <td><input type="checkbox"/></td> <td>S</td> <td>Service</td> <td>0.00</td> <td>1101</td> <td></td> <td>Service</td> </tr> <tr> <td colspan="3"></td> <td>0.00</td> <td colspan="3"></td> </tr> </tbody> </table>								Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode	InvoiceDescription	Marked	FeeType	FeeTypeDesc	ChargeAmount				<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental	<input type="checkbox"/>	L	Loan	0.00	1200		Loan	<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental	<input type="checkbox"/>	S	Service	0.00	1101		Service				0.00			
Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode	InvoiceDescription																																																		
Marked	FeeType	FeeTypeDesc	ChargeAmount																																																					
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental																																																		
<input type="checkbox"/>	L	Loan	0.00	1200		Loan																																																		
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental																																																		
<input type="checkbox"/>	S	Service	0.00	1101		Service																																																		
			0.00																																																					
SP2020MPC	SP2020 Sprint MFC	2020-00007	Hardware	SP2020																																																				
<table border="1"> <thead> <tr> <th>Item Fees</th> <th>Item Meters</th> <th>Item Inclusions</th> <th>Item Contacts</th> <th>AccountCode</th> <th>COSAccountCode</th> <th>InvoiceDescription</th> </tr> <tr> <th>Marked</th> <th>FeeType</th> <th>FeeTypeDesc</th> <th>ChargeAmount</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>E</td> <td>Evergreen Rental</td> <td>0.00</td> <td>1202</td> <td></td> <td>Evergreen Rental</td> </tr> <tr> <td><input type="checkbox"/></td> <td>L</td> <td>Loan</td> <td>0.00</td> <td>1200</td> <td></td> <td>Loan</td> </tr> <tr> <td><input type="checkbox"/></td> <td>R</td> <td>Bank Rental</td> <td>0.00</td> <td>1204</td> <td></td> <td>Bank Rental</td> </tr> <tr> <td><input type="checkbox"/></td> <td>S</td> <td>Service</td> <td>0.00</td> <td>1101</td> <td></td> <td>Service</td> </tr> <tr> <td colspan="3"></td> <td>0.00</td> <td colspan="3"></td> </tr> </tbody> </table>								Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode	InvoiceDescription	Marked	FeeType	FeeTypeDesc	ChargeAmount				<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental	<input type="checkbox"/>	L	Loan	0.00	1200		Loan	<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental	<input type="checkbox"/>	S	Service	0.00	1101		Service				0.00			
Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode	InvoiceDescription																																																		
Marked	FeeType	FeeTypeDesc	ChargeAmount																																																					
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental																																																		
<input type="checkbox"/>	L	Loan	0.00	1200		Loan																																																		
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental																																																		
<input type="checkbox"/>	S	Service	0.00	1101		Service																																																		
			0.00																																																					

Blue arrows indicate the following actions:

- Scroll right to view all the contract items information.
- 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**

In this screen,

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**



Contract Info

Contract No:

Contract Type:

Start Date:

End Date:

Period:

Period Type:

Department:

Contract Manager:

Salesman:

Aggregate Billing: ☐

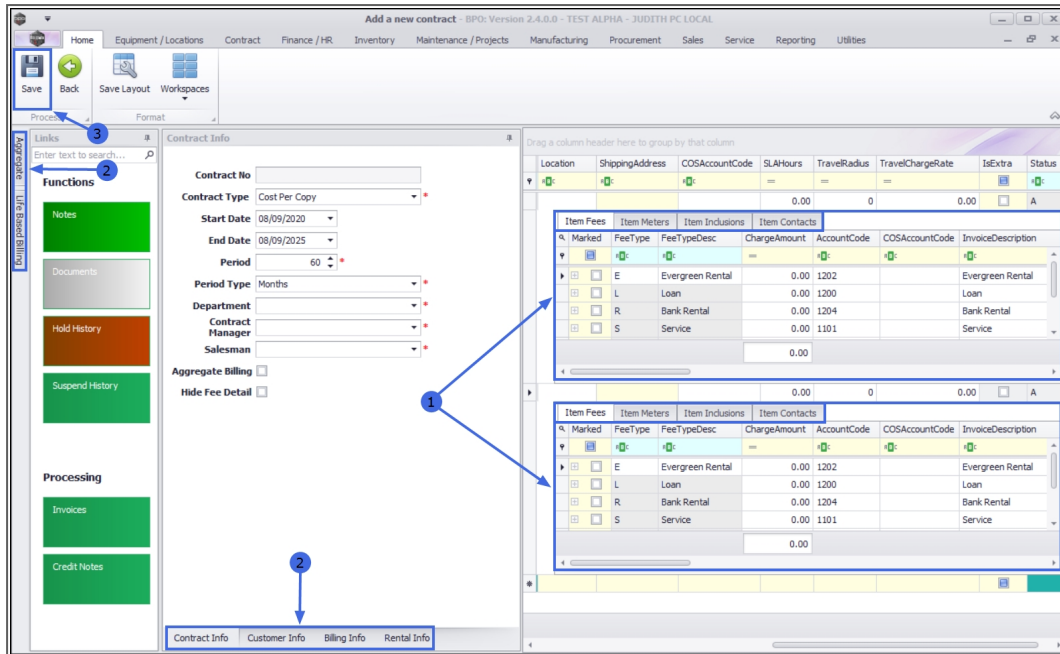
Hide Fee Detail: ☐

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input type="checkbox"/>	S	Service	0.00	1101		Service

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**.



Contract Info

Contract No:

Contract Type: **Cost Per Copy**

Start Date: 08/09/2020

End Date: 08/09/2025

Period: 60

Period Type: Months

Department:

Contract Manager:

Salesman:

Aggregate Billing: ☐

Hide Fee Detail: ☐

Item Fees

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input type="checkbox"/>	S	Service	0.00	1101		Service

Item Meters

Marked	MeterType	MeterTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input type="checkbox"/>	S	Service	0.00	1101		Service

Processing

Invoices

Credit Notes

Contract Info Customer Info Billing Info Rental Info

- 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

