

# **CONTRACTS**

## **CONTRACTS AND BILLING INDEX**

#### **SETUP**

- Contract Setup Data
- Introduction to Contracts
- Add a New Machine Contract
- Add a New Location
  Contract
- Prepaid Contracts
- Edit Contract Details
- Add / View Contract Notes
- Link / View Digital
  Documents
- Find Contract by Serial Number
- Find Contract by Contract Number
- Awaiting Contracts
- Create a New Contract (from v2.3.0 up)
- Create a New Location
  Contract (from v2.3.0
  up)

#### LOAN MACHINES

Loan Machine Processing

### **Swap Outs**

- Contract Configuration:Swap Outs
- Swap Out Customer Asset on Contract for Serialised Stock Item
- Swap Out Customer Asset on Contract for an Internal Asset
- Swap Out Internal Asset on Contract for another Internal Asset
- Swap Out Internal Asset on Contract for a Serialised Stock Item

#### **HOLD CONTRACT**

- Placing a Contract on Hold
- Releasing a Contract from Hold



## Contracts and Billing Index

#### ADDITIONAL CONTRACT ITEMS SUSPEND CONTRACT

- Machines Assign / Edit / Remove / Item Buy Back
- Meter Charges Setup
  Notes / Assign / Edit
  / Remove
- Contacts
- Fee Charges Assign /
  Edit / Remove
- Assign Inclusions
- Scheduled Maintenance Tasks
- Rental Calculator (version update pending)

#### **CONTRACT APPROVAL**

- Release for / Remove from Approval
- Approve a Contract

#### SHORT TERM CONTRACTS

- Short Term Products
- Add / Edit a Short Term Contract
- Print Contract Report
- Short Term Contract Invoice
- Reprint Deposit Invoice

- Suspend Contract
- Reinstate Suspended Contract

#### **BILLING**

- Aggregate Billing Processing
- Month End Billing Process
- Release Billing Period
- Close Billing Period
- Manual Contract Invoice
- Debit Order Processing
- Interest Rate Adjustment
- Billing: Prepaid / Life-Based Contracts
- Billing: Aggregate Billing
- Billing: Back to Back Contracts

#### **METER PROCESSING**

- Contract Processing:
  Unprocessed Meters
- Processing: Meter Usage
- Meter Usage: Set Unprocessed Meters
- Meter Usage: Release to Billing
- Meter Usage: Refresh
  Meters



## Contracts and Billing Index

- / Contract Invoice
- Print Contract Return
  Report
- Create Machine Return
  Work Orders
- Close Short Term
  Rental Contract

#### **REPORTING**

- Print a Contract Report
- Print Contract Performance Report
  Print Copy of Contract
- Print Copy of Contract Invoice (Document Search)
- Reprint Original Contract Invoice (Print Queue Reprint)
- View outstanding Print Queue (Print Queue Viewer)
- Utilities Print Queue

- Meter Usage: Send Meter
  Reading Request
- Meter Usage: Set Uncaptured Meter to Last Call
  Reading
- Meter Usage: Set Meter to Six Month Average
- Aggregate Meters Set Up 1
- Aggregate Meters Set Up 2

#### **CREDIT NOTE**

- Credit Note Processing
- Credit Note Approval

#### **ESCALATIONS**

- Escalation Notifications
- Ad hoc Escalations
- Run Period Escalations

#### **END OF CONTRACT**

End of Contract Processing

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