

CONTRACTS

CONTRACT EXPIRY – LEASE TO PURCHASE

For expired contracts that remain active, you have the ability to sell off serial numbers that have been selected, if the selected items are internal assets.

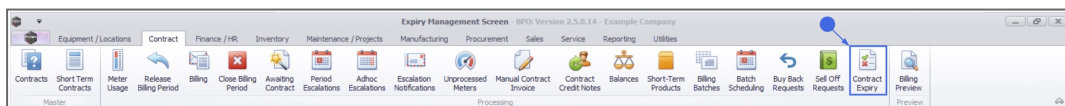
Approval of the Sell Off Requests auto processes the following:

- Removes the internal asset from Contract
- Returns the Asset to the Asset Warehouse
- Converts from Asset to Stock
- Requests and Issues the Asset as a Stock Item
- Creates a Sales Invoice
- Prints the Invoice

Ensure the [Contract Swap Out Configuration](#) is correctly configured.

LEASE TO PURCHASE

Ribbon Select *Contract* > *Contract Expiry*



The *Contract Expiry Management* screen will be displayed.

Select the Site

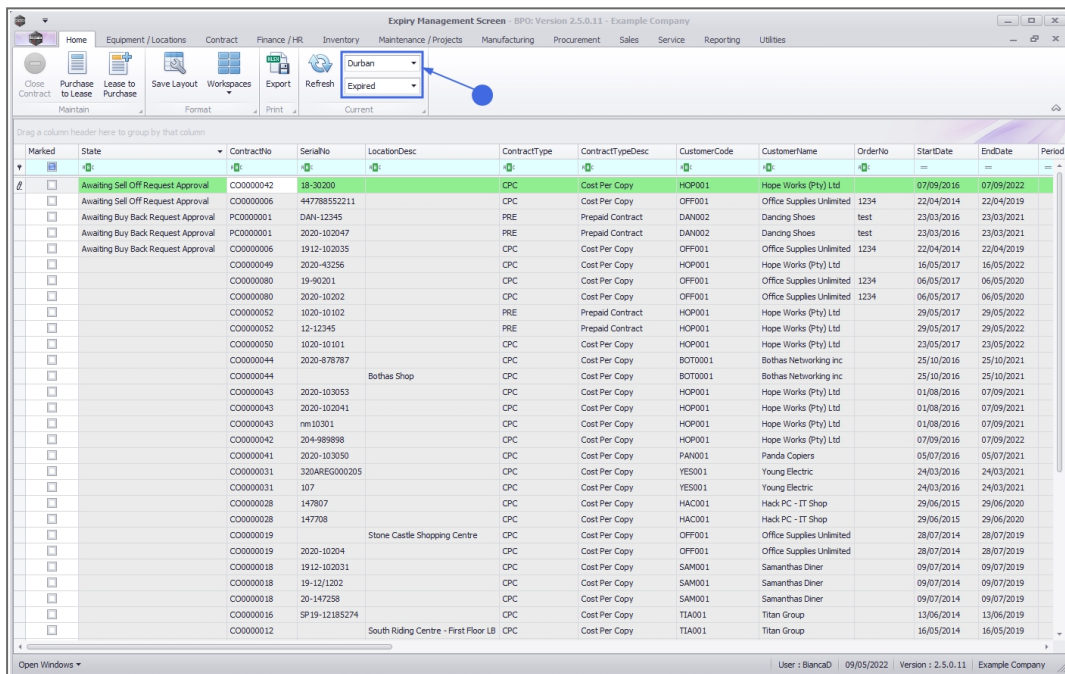
Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Expired** status, listing all the serial numbers on contracts that have expired, indicating the state of the serial number. The expiry date is based on the contract start date + contract period.

You can view all contracts, regardless of expiry date, by selecting the **All** status.



Marked	State	ContractNo	SerialNo	LocationDesc	ContractType	ContractTypeDesc	CustomerCode	CustomerName	OrderNo	StartDate	EndDate	Period
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000042	18-30200		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		07/09/2016	07/09/2022	
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000006	44788552211		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	22/04/2014	22/04/2019	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	DAN-12345		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	2020-102047		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	CO0000006	1912-102035		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	22/04/2014	22/04/2019	
<input type="checkbox"/>		CO0000049	2020-43256		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		16/05/2017	16/05/2022	
<input type="checkbox"/>		CO0000080	19-90201		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	06/05/2017	06/05/2020	
<input type="checkbox"/>		CO0000080	2020-10202		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	06/05/2017	06/05/2020	
<input type="checkbox"/>		CO0000052	12-12345		PRE	Prepaid Contract	HOP001	Hope Works (Pty) Ltd		29/05/2017	29/05/2022	
<input type="checkbox"/>		CO0000050	1020-10101		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		23/05/2017	23/05/2022	
<input type="checkbox"/>		CO0000044	2020-878787		CPC	Cost Per Copy	BOT0001	Bothas Networking Inc		25/10/2016	25/10/2021	
<input type="checkbox"/>		CO0000044		Bothas Shop	CPC	Cost Per Copy	BOT0001	Bothas Networking Inc		25/10/2016	25/10/2021	
<input type="checkbox"/>		CO0000043	2020-103053		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000043	2020-102041		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000043	nm10301		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000042	204-989898		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd		07/09/2016	07/09/2022	
<input type="checkbox"/>		CO0000041	2020-103050		CPC	Cost Per Copy	PAN001	Panda Copiers		05/07/2016	05/07/2021	
<input type="checkbox"/>		CO0000031	320AREG000205		CPC	Cost Per Copy	YES001	Young Electric		24/03/2016	24/03/2021	
<input type="checkbox"/>		CO0000031	107		CPC	Cost Per Copy	YES001	Young Electric		24/03/2016	24/03/2021	
<input type="checkbox"/>		CO0000028	147807		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop		29/06/2015	29/06/2020	
<input type="checkbox"/>		CO0000028	147708		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop		29/06/2015	29/06/2020	
<input type="checkbox"/>		CO0000019		Stone Castle Shopping Centre	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited		28/07/2014	28/07/2019	
<input type="checkbox"/>		CO0000019	2020-10204		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited		28/07/2014	28/07/2019	
<input type="checkbox"/>		CO0000018	1912-102031		CPC	Cost Per Copy	SAN001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000018	19-12/1202		CPC	Cost Per Copy	SAN001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000018	20-147258		CPC	Cost Per Copy	SAN001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000016	SP19-12185274		CPC	Cost Per Copy	TIA001	Titan Group		13/06/2014	13/06/2019	
<input type="checkbox"/>		CO0000012		South Riding Centre - First Floor LB	CPC	Cost Per Copy	TIA001	Titan Group		16/05/2014	16/05/2019	

- Select the **row(s)** of **items** that you wish to process.
- Multiple items selection is available for assets on the same contract.

Expiry Management Screen - BPO: Version 2.5.0.14 - Example Company

Applied Filter: [Marked] = 'Unchecked'

Marked	State	ContractNo	SerialNo	LocationDesc	ContractType	ContractTypeDesc	CustomerCode	CustomerName	OrderNo	StartDate	EndDate	Period	PeriodType
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	DAN-12345		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	60 m	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	2020-102047		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	60 m	
<input type="checkbox"/>		CO0000074	2020-9896		CPC	Cost Per Copy	DER001	Derton / Technologies	1234	15/06/2018	15/06/2023	60 m	
<input type="checkbox"/>		CO0000072	0109501101530003		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	07/03/2018	07/03/2023	60 m	
<input type="checkbox"/>		CO0000071	2020-98765		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1144	07/03/2018	07/03/2023	60 m	
<input checked="" type="checkbox"/>		CO0000069	2020-9873		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	05/03/2018	05/03/2023	60 m	
<input checked="" type="checkbox"/>		CO0000069	HMACH-2020-54321		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	05/03/2018	05/03/2023	60 m	
<input type="checkbox"/>		CO0000067	2020-9875		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	05/03/2018	05/03/2023	60 m	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	CO0000052	12-12345		PRE	Prepaid Contract	HOP001	Hope Works (Pty) Ltd	1234	29/05/2017	29/05/2022	60 m	
<input type="checkbox"/>		CO0000050	1020-10101		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	23/05/2017	23/05/2022	60 m	
<input type="checkbox"/>		CO0000049	2020-43256		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	16/05/2017	16/05/2022	60 m		
<input type="checkbox"/>		CO0000044	2020-878787		CPC	Cost Per Copy	BOT0001	Bothas Networking Inc	25/10/2016	25/10/2021	60 m		
<input type="checkbox"/>		CO0000043	2020-103053		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	01/08/2016	07/09/2021	60 m		
<input type="checkbox"/>		CO0000043	2020-102041		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	01/08/2016	07/09/2021	60 m		
<input type="checkbox"/>		CO0000041	2020-103050		CPC	Cost Per Copy	PAN001	Panda Copiers	05/07/2016	05/07/2021	60 m		
<input type="checkbox"/>		CO0000031	320AREG000205		CPC	Cost Per Copy	YES001	Young Electric	24/03/2016	24/03/2021	60 m		
<input type="checkbox"/>		CO0000031	107		CPC	Cost Per Copy	YES001	Young Electric	24/03/2016	24/03/2021	60 m		
<input type="checkbox"/>		CO0000028	147807		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop	29/06/2015	29/06/2020	60 m		
<input type="checkbox"/>		CO0000028	147708		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop	29/06/2015	29/06/2020	60 m		
<input type="checkbox"/>		CO0000019	2020-10204		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	28/07/2014	28/07/2019	60 m		
<input type="checkbox"/>		CO0000018	1912-102031		CPC	Cost Per Copy	SAM001	Samanthas Diner	09/07/2014	09/07/2019	60 m		
<input type="checkbox"/>		CO0000018	19-12/1202		CPC	Cost Per Copy	SAM001	Samanthas Diner	09/07/2014	09/07/2019	60 m		
<input type="checkbox"/>		CO0000018	20-147258		CPC	Cost Per Copy	SAM001	Samanthas Diner	09/07/2014	09/07/2019	60 m		
<input type="checkbox"/>		CO0000016	SP19-12185274		CPC	Cost Per Copy	TJA001	Titan Group	13/06/2014	13/06/2019	60 m		

✖ [Marked] = 'Unchecked'

User: BiancaD | 26/10/2022 | Version: 2.5.0.14 | Example Company

- Click on the **Purchase to Lease** button.

Expiry Management Screen - BPO: Version 2.5.0.14 - Example Company

Applied Filter: [Marked] = 'Unchecked'

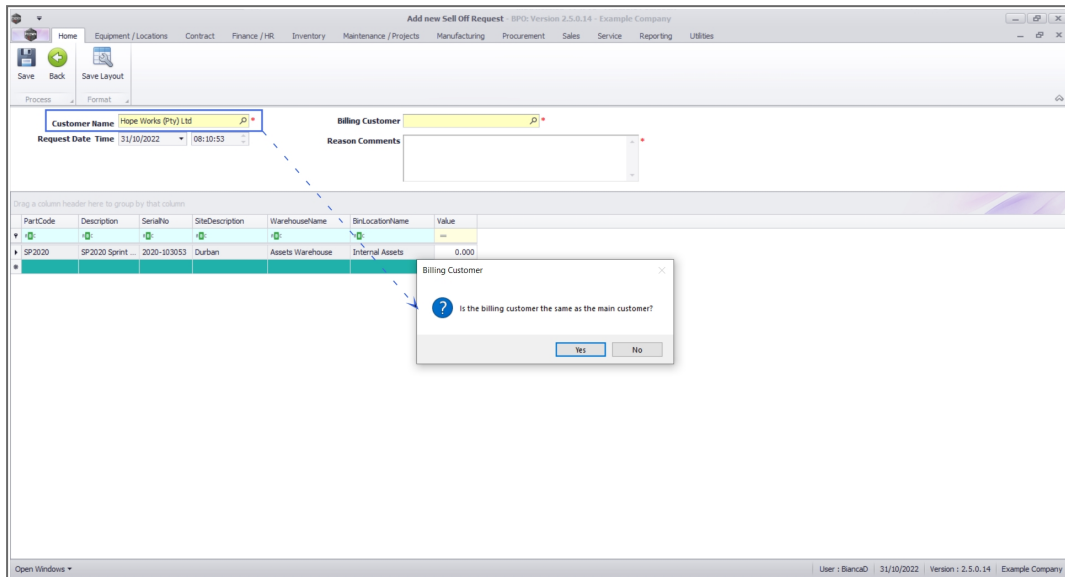
Marked	State	ContractNo	SerialNo	LocationDesc	ContractType	ContractTypeDesc	CustomerCode	CustomerName	OrderNo	StartDate	EndDate	Period	PeriodType
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	DAN-12345		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	60 m	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	2020-102047		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	60 m	
<input type="checkbox"/>		CO0000074	2020-9896		CPC	Cost Per Copy	DER001	Derton / Technologies	1234	15/06/2018	15/06/2023	60 m	
<input type="checkbox"/>		CO0000072	0109501101530003		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	07/03/2018	07/03/2023	60 m	
<input type="checkbox"/>		CO0000071	2020-98765		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1144	07/03/2018	07/03/2023	60 m	
<input checked="" type="checkbox"/>		CO0000069	2020-9873		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	05/03/2018	05/03/2023	60 m	
<input checked="" type="checkbox"/>		CO0000069	HMACH-2020-54321		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	05/03/2018	05/03/2023	60 m	
<input type="checkbox"/>		CO0000067	2020-9875		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	05/03/2018	05/03/2023	60 m	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	CO0000052	12-12345		PRE	Prepaid Contract	HOP001	Hope Works (Pty) Ltd	1234	29/05/2017	29/05/2022	60 m	
<input type="checkbox"/>		CO0000050	1020-10101		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	1234	23/05/2017	23/05/2022	60 m	
<input type="checkbox"/>		CO0000049	2020-43256		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	16/05/2017	16/05/2022	60 m		
<input type="checkbox"/>		CO0000044	2020-878787		CPC	Cost Per Copy	BOT0001	Bothas Networking Inc	25/10/2016	25/10/2021	60 m		
<input type="checkbox"/>		CO0000043	2020-103053		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	01/08/2016	07/09/2021	60 m		
<input type="checkbox"/>		CO0000043	2020-102041		CPC	Cost Per Copy	HOP001	Hope Works (Pty) Ltd	01/08/2016	07/09/2021	60 m		
<input type="checkbox"/>		CO0000041	2020-103050		CPC	Cost Per Copy	PAN001	Panda Copiers	05/07/2016	05/07/2021	60 m		
<input type="checkbox"/>		CO0000031	320AREG000205		CPC	Cost Per Copy	YES001	Young Electric	24/03/2016	24/03/2021	60 m		
<input type="checkbox"/>		CO0000031	107		CPC	Cost Per Copy	YES001	Young Electric	24/03/2016	24/03/2021	60 m		
<input type="checkbox"/>		CO0000028	147807		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop	29/06/2015	29/06/2020	60 m		
<input type="checkbox"/>		CO0000028	147708		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop	29/06/2015	29/06/2020	60 m		
<input type="checkbox"/>		CO0000019	2020-10204		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	28/07/2014	28/07/2019	60 m		
<input type="checkbox"/>		CO0000018	1912-102031		CPC	Cost Per Copy	SAM001	Samanthas Diner	09/07/2014	09/07/2019	60 m		
<input type="checkbox"/>		CO0000018	19-12/1202		CPC	Cost Per Copy	SAM001	Samanthas Diner	09/07/2014	09/07/2019	60 m		
<input type="checkbox"/>		CO0000018	20-147258		CPC	Cost Per Copy	SAM001	Samanthas Diner	09/07/2014	09/07/2019	60 m		
<input type="checkbox"/>		CO0000016	SP19-12185274		CPC	Cost Per Copy	TJA001	Titan Group	13/06/2014	13/06/2019	60 m		

✖ [Marked] = 'Unchecked'

User: BiancaD | 26/10/2022 | Version: 2.5.0.14 | Example Company

- Customer Name:** Search for and select the Main Customer. The customer where the asset is physically.
- A message box will come up asking: **Is the billing customer the same as the main customer?**
- Click on the **Yes** button, to auto-populate the Billing Customer field with the same customer selected.

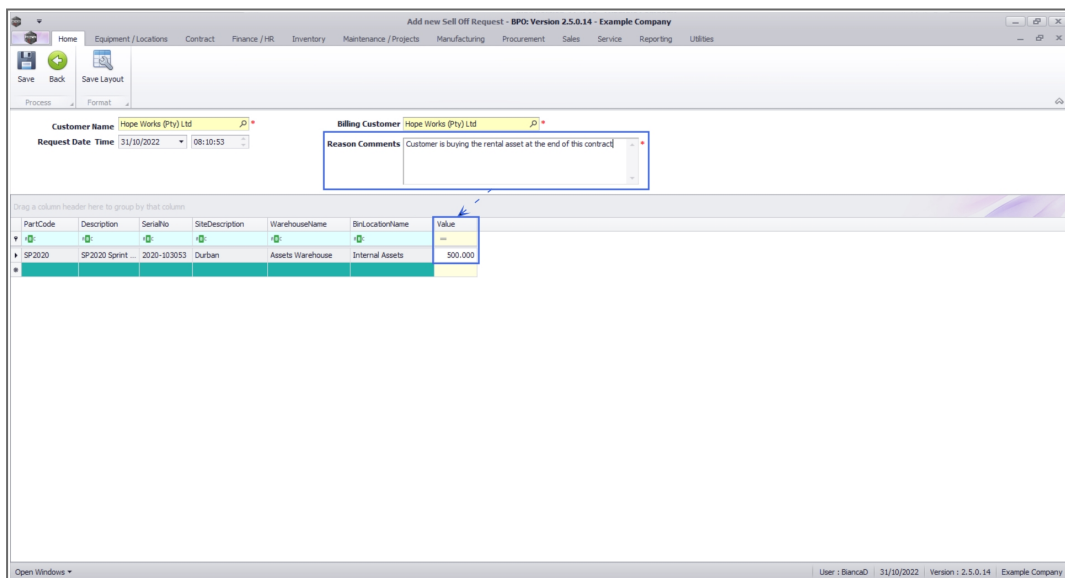
- or
- Click on the **No** button, to search for and select the Billing Customer where different from the main customer.



The screenshot shows the 'Add new Sell Off Request' form in the BPO Version 2.5.0.14. The 'Customer Name' is 'Hope Works (Pty) Ltd' and the 'Request Date Time' is '31/10/2022'. A 'Billing Customer' field is also present. A confirmation dialog box is displayed, asking: 'Is the billing customer the same as the main customer?'. The dialog has 'Yes' and 'No' buttons. Below the dialog, a table lists assets for sale:

PartCode	Description	SerialNo	SiteDescription	WarehouseName	BrLocationName	Value
SP2020	SP2020 Sprint ...	2020-103053	Durban	Assets Warehouse	Internal Assets	0.000

- **Reason Comments:** Type in the reason for this buying back the asset(s) selected.
- Update the Buy Back **Value** for each item.

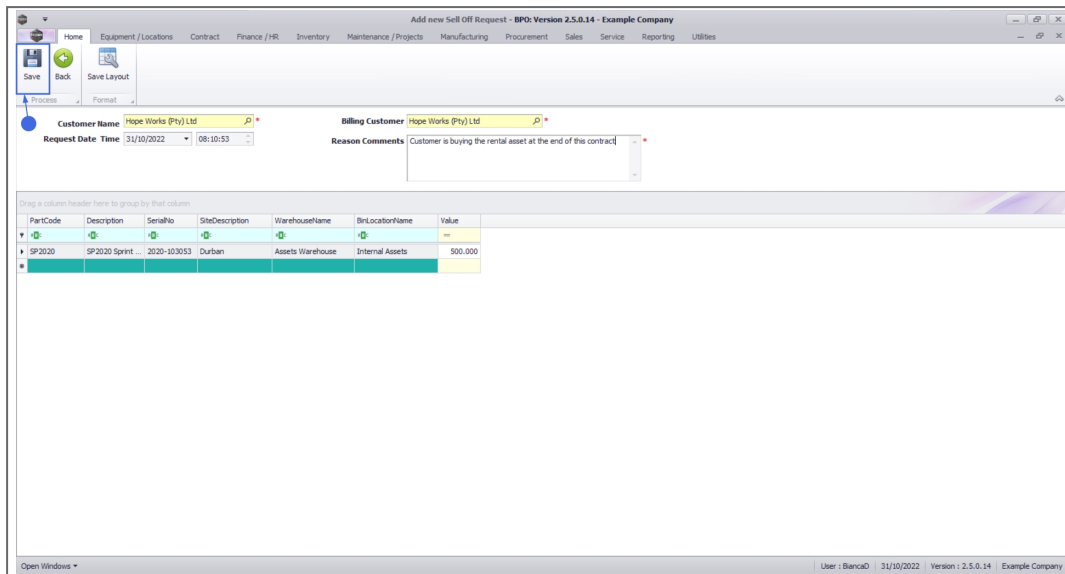


The screenshot shows the 'Add new Sell Off Request' form with updated information. The 'Reason Comments' field now contains: 'Customer is buying the rental asset at the end of this contract'. The 'Value' for the asset in the table has been updated to 500.000.

PartCode	Description	SerialNo	SiteDescription	WarehouseName	BrLocationName	Value
SP2020	SP2020 Sprint ...	2020-103053	Durban	Assets Warehouse	Internal Assets	500.000

Once you have updated the Value for all assets:

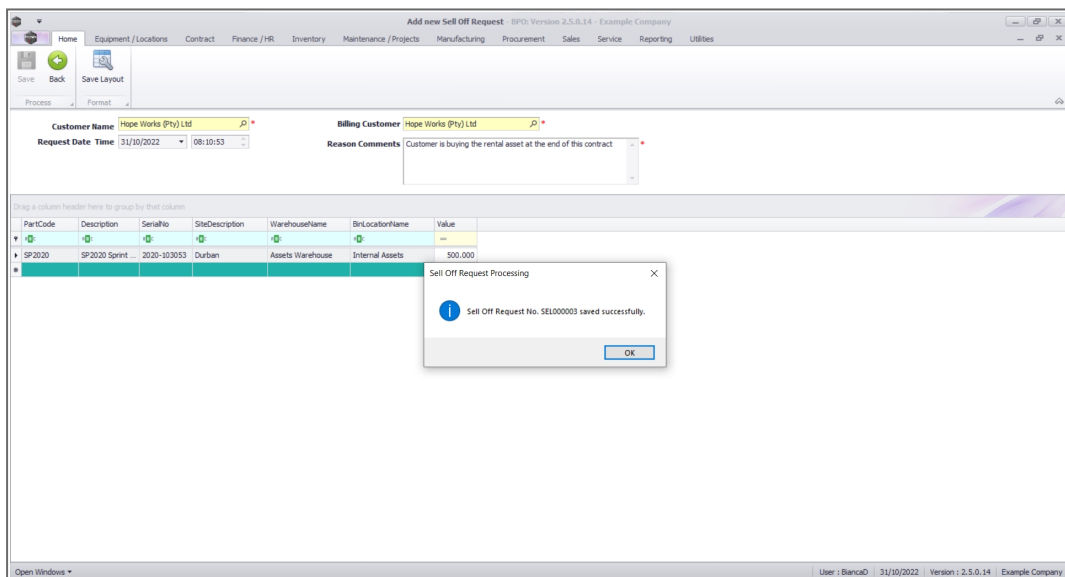
- Click on the **Save** button.



PartCode	Description	SerialNo	SiteDescription	WarehouseName	BinLocationName	Value
SP2020	SP2020 Sprint...	2020-103053	Durban	Assets Warehouse	Internal Assets	500.000

The **Sell Off Request Processing** message box will come up, noting: **Sell Off Request No. [sell off request number] saved successfully.**

- Click on the **Ok** button.



The **Sell Off Request Processing** screen will close, and the selected items marked as **Awaiting Sell Off Request Approval**.

Expiry Management Screen - BPO: Version 2.5.0.14 - Example Company

Applied Filter: Contains[SerialNo], '2020-103053'

Marked	State	ContractNo	SerialNo	LocationDesc	ContractType	ContractTypeDesc	CustomerCode	CustomerName	OrderNo	StartDate	EndDate	Period	PeriodType	Peri
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000043	2020-103053		GPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	60 m		

User: BiancaD | 31/10/2022 | Version: 2.5.0.14 | Example Company



Refer to **"Introduction to Buy Back Requests"** on page 1 for more information relating to processing Sell Off Requests.

Related Topics

- [Contract Expiry](#)
- [Intro to Sell Off Requests](#)
- [View Sell Off Request Details](#)
- [Edit a Sell Off Request](#)
- [Approve Sell Off Request](#)
- [Decline Sell Off Request](#)
- [Print Sell Off Request](#)

MNU.010.004