

CONTRACT

CONTRACTS - ADD (PRE V2.3.0.0)

In BPO2 you can create either a **service** contract or a **rental** contract.

Service Contract: Machine sold to customer outright or via a finance house.

• A New Deal Sale must be completed in order to create this contract.

Rental Contract: In-house rental (machine owned by company).

• New Deal Rental must be completed in order to create this contract.

Ribbon Access: Contract > Contracts

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Mas	tter 4						Proc	cessing					Preview	

The *Contract Listing* screen will be displayed.

- Select the *Site* that you wish to work in.
 - In this image *Durban* has been selected.



Contracts - Add (pre v2.3.0.0)

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- By default, this screen will list all the *Active* contracts for the selected site.
 - You do not need to change this status to create/add a new contract.
- Click on *Add*.

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• The *Add a new Contract* screen will be displayed.

CUSTOMER INFO PANEL

• Click on the *Customer Info* tab.



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The *Customer Info* panel will expand.



- Note: *Dock* this panel to make it easier to work in.
- **Customer:** Click on the search button and select the customer from the *Select a customer for this contract* pop up screen.
- Address: Click on the search button and select the address from the *Select an address for this contract* pop up screen.
- Order No: Type in the customer order number if required.
- **Required:** Only select this check box if the client <u>must</u> supply an order number before a technician is sent to site.
- Location: Click on the drop-down arrow and select the contract location from the menu.



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CONTRACT INFO PANEL

• When you have finished editing the customer info details, click on the *Contract Info* tab.



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The *Contract Info panel* will expand.



- **Contract No:** The contract number is generated by the system (where configured in the Contract Type set up).
- **Contract Type:** Click on the drop-down arrow and select the Contract Type e.g., Prepaid Contract.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- End Date: This will auto populate 5 years from the start date but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
- **Period:** Either type in or use the arrow indicators to select the period of the contract (life span of the contract).
- **Period Type:** Select the period type (measure relating to the lifespan), e.g., 60 <u>months</u>.
- **Department:** Click on the drop-down arrow and select the department.
- **Contract Manager:** Click on the drop-down arrow and select the contract manager.
- **Salesman:** Click on the drop-down arrow and select the salesman.
- Aggregate Billing: Click on this check box if the customer will receive aggregate billing.
- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.
 - Note: If this is an evergreen contract, set your end date to 31/12/2999



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BILLING INFO PANEL

• When you have finished editing the contract info details, click on the *Billing Info* tab.



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The *Billing Info panel* will be expanded.



- Note: Some of these details will auto populate but they can be changed as explained below.
- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- **Billing Period:** This is the financial period in which billing will first begin. Type in or use the arrow indicators to select the period number (e.g., January = 11).
- **Billing Day:** Type in the day that the customer will be billed (e.g., on the 25th of each billing cycle).

NOTE ON BILLING DAY

- The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the Contract Billing screen. The Billing Day is limited to 31. You can type in the day that the customer will be billed (e.g., on the 25th of each billing cycle) else leave as 0.
- **Escalation Type:** Search for and Select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g., 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
 - Note: If this escalates on the anniversary of the contract, then use the same financial period as the billing period
- **Currency:** The system will auto populate with the currency already set up on the customer but you can click on the drop-down arrow and select an alternative currency if required.



- Note: For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g., type in the Dollar amount if the currency is USD.
- **Exchange:** Type in the exchange rate.
- Tax Rate: Type in the tax rate.



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- When you have finished editing the Billing Info panel, you can *hide (dock)* the panel to make it easier to work in the *Items* frame.
- Click on the *docking icon* in the billing panel.



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• The *Customer Info*, *Contract Info* and *Billing Info* panels will now be reduced to *tabs* at the side of the screen.



CONTRACT PARTS FRAME

• *Right click* anywhere in the *row* of the *Parts* frame.

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• A *Process* menu will pop up.

ADD MACHINE ITEM

• Click on *Machine* - Add New Machine Item.



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- The *Select a new item* pop up screen will appear.
- Click on the *row selector* in front of the *machine* that you wish to



link to this contract.

• Click on Ok.

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- The following columns will auto populate according to your item selection:
 - Part Code
 - Description
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 - Asset Register No



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LINK LOCATION

- Click in the *Location* text box.
- Type in a *location* for this item.

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LINK SHIPPING ADDRESS

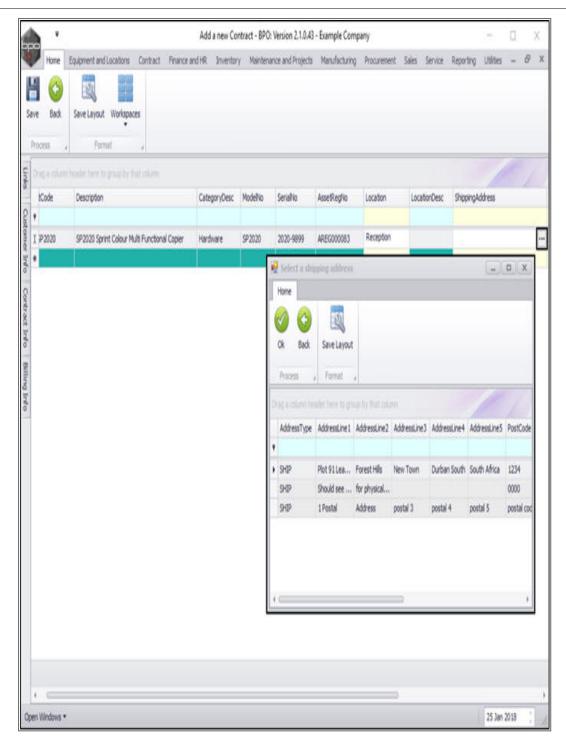
• Click in the *Shipping Address* text box.



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- An *ellipsis* button will be revealed.
- Click on this button to display the *Select a shipping address* pop up screen.





- Click on the *row selector* in front of the *shipping address* that you wish to *link* to this *item*.
- Click on *Ok*.



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• *Scroll right* to view the remaining columns in the Items frame.



LINK COS ACCOUNT CODE

- Click in the COS Account Code text box.
- Type in the *Cost of Sales account code* to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).



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LINK SLA HOURS

- Click in the *SLA Hours* text box.
- Type in or use the arrow indicators to select the required call response time (in hours).



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LINK TRAVEL RADIUS

- Click in the *Travel Radius* text box.
- Type in or use the arrow indicators to select the distance in km's to and from the client, if this travel is to be billed every time a call is logged. If travel is included, then set this to **0**.
 - Note: Travel can always be billed separately, if required.



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LINK TRAVEL CHARGE

- Click in the *Travel Charge Rate* text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g., Rand per kilometre).



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- The *Is Extra* and *Status* fields are static.
- *Scroll left*, so that you can view the *Part Code* column again.



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ITEMS FRAME

• Click on the *expand* button in the *Part Code* text box.



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- The selected machine's *Item* frame will be expanded.
- Here you can click on 4 different tabs to add or edit:

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- Item Fees: monthly charges
- Item Meters: meter usage charges
- Item Inclusions: items not to bill
- ^o **Item Contacts:** the contact person per machine.

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ITEM FEES FRAME

The Item Fees frame displays Contract Item Fees that have been set up.

Add Item Fee

- Marked: Click on the check box in this column in front of the *Fee Type* and *Fee Description* to be charged
 - In this image **N** Insurance has been selected as an example.
- **Charge Amount:** Type in or use the arrow indicators to select the fee amount.
- Account Code: This will auto populate with the account code linked to this fee item.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.
- **Invoice Description:** Type in the description to be used for this fee on the invoice.
- **Start Date and End Date:** These will auto populate according to the contract start date and end date selected in the Contract Info panel. You can click on the drop-down arrow and use the calendar function to select an alternative start and end date if required.
 - Note: Take note that the contract fee will only bill from the <u>start</u> date, and will stop billing at the <u>end</u> date.
- **Period & Period Type:** These fields will auto populate according to the contract start and end date recorded in the Contract Info panel. You can click on the text boxes and either type in or use the drop-down arrows to select an alternative period and period type if required.



- **Billing Cycle:** This will auto populate according to the contract billing cycle recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing cycle if required.
- **Billing Period:** This will auto populate according to the contract billing period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing period if required.
- **Escalation Period:** This will auto populate according to the escalation period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative escalation period if required.



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Scroll right to view the remaining columns in this frame.

• Escalation Type: This will auto populate according to the escalation type recorded in the Billing Info panel. You can click on the



drop-down arrow in the text box to select an alternative escalation type if required.

• Escalation Amount: This will auto populate according to the escalation amount recorded in the Billing Info panel. You can click on the text box and either type in or use the arrow indicators to select an alternative escalation amount if required.



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• Customer Code:

° Click in the *Customer Code* text box.

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• Customer Code:

- ° An *ellipsis* button will be revealed.
- Click on this button to display the Select a billing customer pop up screen.

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• Customer Code:

- Select the *row* of the *Billing Customer* to whom you wish to *link* this *contract*.
- ° Click on **Ok**.

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- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.
 - Note: If the customer details are left blank, the system will bill the main customer linked to the contract.



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• Supplier Code / Supplier Name / Finance Amount

 $^\circ~$ Follow the next 5 screen shots <u>only</u> if you wish to link



a supplier for rental back-to-backs (finance house bills company & company bills client).

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• Supplier Code:



- Click on the *Supplier Code* text box to reveal an *ellip-sis* button.
- Click on this button to display the *Select a finance party* pop up screen

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- Supplier Code:
 - Select the *row* of the *Supplier* that you wish to *link* to this *item*.
 - Click on Ok.



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• **Supplier Name:** This will auto populate once the supplier code has been selected.



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• **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



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• **Suppress on Invoice:** Select this if you wish to hide the fee on the invoice.



- **Comment:** Click in this text box and type in a comment regarding this contract fee, if required.
- Order No: Type in a customer order number relevant to this item, if required.
- **Status:** This field will change from *I* (Inactive) to *A* (Active) when you have saved the assigned item fee.
- Amend Date: This field is static.

The 'Add an Item Fee' process is now complete.



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Link Additional Item Fees

- Scroll back to the Marked column.
- You can now set up *additional fees* for this machine by following the above process, if required, before moving on to the next frame.



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ITEM METERS FRAME

• When you have finished working in the Item Fees frame, click on the *Item Meters* tab.

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• The Item Meters frame displays all linked meters, minimum billing and meter usage charges.

Read this Important Note on Min Billing and Meter Charge Setup

- If you are not going to bill meters then this is fine. If you are complete the contract set up (you can link the meters afterwards) then follow these 2 steps:
 - 1. Assign the meter to the machine
 - 2. Add the meter charges to the contract



PartCode Description CategoryOesc ModelNo SeriaNo AssetRegNo SP2020 SP2020 Sprint Colour Multi Functional Copier Hardware SP2020 2020-9899 AREGO00083 Item Frees Item Meters Item Inclusions Item Contacts A Marked MeterCode StarSkeading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es A Marked MeterCode StarSkeading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es Colour 0.00 01 Jan 1900 0.00 0 Colour 0.00	11	EscalationType Percentage Percentage	ic ShippingAdd Plot 91 Leaf EscalationAmoun
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- **Marked:** Click on the check box in front of the name of the first Meter to be billed on this contract.
 - In this image the **Mono** meter has been selected as an example.
- **Start Reading:** Type in the start reading of the meter.
- **Reading Date:** Click in this text box to display the calendar function, use this to select the reading date.
- **Min Billing:** Type in the minimum billing amount (in Rand value).
- **Min Quantity:** Type in the minimum quantity (the copies that are included in the minimum billing amount).
- Account Code: Type in the sales account code for these meter charges to post to.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.



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• Escalation Period, Escalation Type and Escalation Amount: These will pull through from the main contract details but you can click in the text boxes and amend the details if required.



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- *Scroll right* until you can view the remaining columns in this frame.
 - Supplier Code, Supplier Name and Finance Amount: Follow the next 5 screenshots <u>only</u> if you wish to link a supplier here - if a party other than the main customer will be paying for the meter charges (e.g., this company's head office).



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- Supplier Code:
 - Click on the *Supplier Code* text box to reveal an *ellipsis* button.
 - Click on this button to display the Select a finance party pop up screen.



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- Supplier Code:
 - Click on the *row selector* in front of the *Supplier* that you wish to *link* to this *item meter*.
 - Click on Ok.



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• **Supplier Name:** This will auto populate once the supplier code has been selected.



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• Finance Amount: Click in this text box and either type in or use the arrow indicators to select the finance amount.



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- **Order No:** Type in a customer order number relevant to this item, if required.
- Is Active: This field is set to Yes (Active) once you have clicked on the Marked checkbox.
- Amend Date: This field is static.



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Add Meter Levels

Read this Important Note on Min Billing and Meter Charge Setup

- Scroll left to return to the Marked column.
- Right click in the row of the item you wish to add a meter level to.
 - In this image the *Mono* meter has been selected.
- A *Process* menu will pop up.
- Click on **Add** Add a level.



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• The *Meter Charges* frame will be expanded.



- Note: For this mono meter, there is already a minimum billing set up of a R250 charge for the first 1000 copies. BPO calculates the usage charges by first calculating the minimum billing set up. This means the first line in the Meter Charges matrix looks incorrect as the From Quantity is static at 0 but it is actually reading from the minimum billing set up. In this example it will read the meter from 1001.
- From Quantity: This is the number from which this charge will be effective.
 - As the first (minimum billing level) is up to and including 1000, this level will start counting from 1001.
- **Finance Amount:** This will only be populated if backto-back finance is used, and the finance house is financing part of the meter charge.
- Unit Charge: Type in the unit charge for the meter (charge per copy when Minimum Quantity is exceeded).



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Add Additional Charge Level

- *Right click* anywhere in the *row* of the *item* that you wish to add anothermeter level to. (You can keep the meter charges matrix open).
- The *Process* menu will pop up again.
- Click on **Add** Add a level.



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- A *second level* has now been added to the Meter Charges matrix.
 - From Quantity: Type in or use the arrow indicators to select the number of copies from which this charge will be effective.
 - **Finance Amount:** This will only be populated if backto-back finance is used, and the finance house is financing part of the meter charge.
 - Unit Charge: Type in the unit charge for the meter (charge per copy).
 - Repeat this process to add more meter charges as required.

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• When you have finished working in the Meter Charges frame, *close* the frame.



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ITEM INCLUSIONS FRAME

• Click on the *Item Inclusions* tab.



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- The *Item Inclusions* frame will be expanded.
 - The Item Inclusions frame lists all *Contract Inclusions* (items which are included in the contract and not billed separately).



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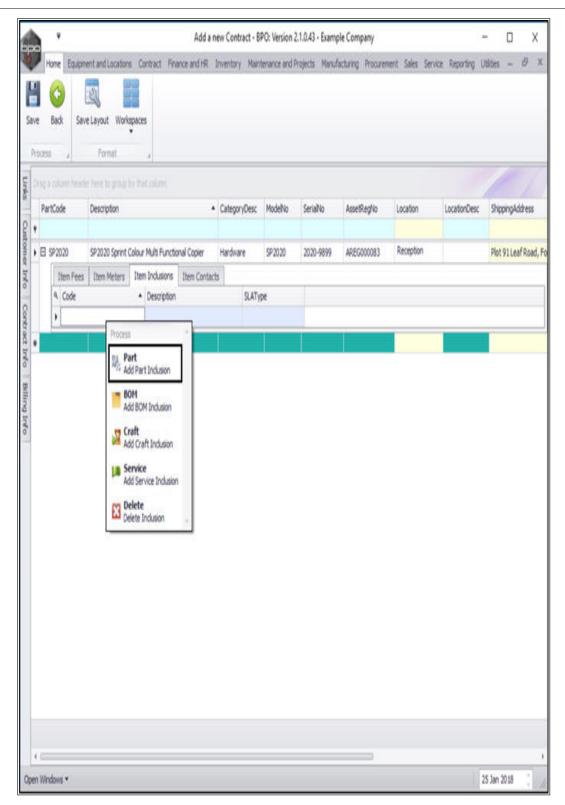
Add Item Inclusions

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- A *Process* menu will pop up with the following options:
 - Part: Add Part Inclusion
 - BOM: Add BOM Inclusion
 - Craft: Add Craft Inclusion
 - Service: Add Service Inclusion
 - Delete: Delete Inclusion

Add Part Inclusion

 Click on *Part* - Add Part Inclusion (individual part issued to a call that will not be billed).







- An Input Validation message box will pop up asking;
 - Are you sure you want to add a part inclusion to this item - []?
- Click on Yes.



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- A *Select a part* screen will pop up.
- Click on the *row selector* in front of the *part* you wish to *add* to this contract as an *inclusion*.
- Click on *Ok*.



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• The selected part will be *added* to the *Item Inclusion* frame.



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Add BOM Inclusion

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- The *Process* menu will pop up.
- Click on **BOM** Add BOM Inclusion (contract inclusion parts issued to a call that will <u>not</u> be billed).



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- An Input Validation message box will pop up asking;
 - Are you sure you want to add a BOM inclusion to this item - []?
- Click on Yes.



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- A *Select a bill of material* screen will pop up.
- Click on the *row selector* in front of the *BOM* you wish to *add* to this contract as an *inclusion*.
- Click on *Ok*.



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• The selected BOM will be added to the Item Inclusions frame.



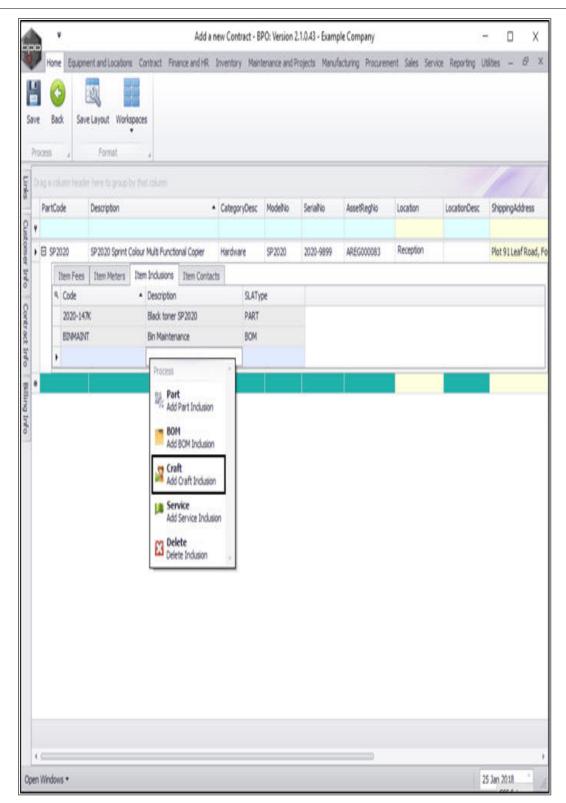
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Add Craft Inclusion

- *Right click* anywhere in a row of the Item Inclusions frame.
- The *Process* menu will pop up.
- Click on *Craft* Add Craft Inclusion (time logged on a call that will not be billed).







- An Input Validation message box will pop up asking;
 - Are you sure you want to add a Craft inclusion to this item []?
- Click on Yes.



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- A *Select a craft* screen will pop up.
- Click on the *row selector* in front of the *craft* you wish to *add* to this contract as an *inclusion*.
- Click on *Ok*.



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• The selected Craft will be added to the Item Inclusions frame.



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Add Service Inclusion

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- The *Process* menu will pop up.
- Click on *Service* Add Service Inclusion (services logged on a call that will not be billed).



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- An Input Validation message box will pop up asking;
 - Are you sure you want to add a Service inclusion to this item - []?
- Click on Yes.



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- A *Select a service* screen will pop up.
- Click on the *row selector* in front of the *service* you wish to *add* to this contract as an *inclusion*.
- Click on Ok.



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• The selected Service will be added to the Item Inclusions frame.



• Note: You can add <u>more than one</u> of each type of item inclusion to the contract.



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Delete Inclusion

- The final option in the *Item Inclusions Process* menu is *Delete* Inclusion.
- *Right click* in the *row* of the *item inclusion* that you wish to *delete* from the contract.
 - In this image *CON* Consulting has been selected.
- The *Process* menu will pop up.
- Click on *Delete* Delete Inclusion.



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- An Input Validation message box will pop up asking;
 - Are you sure you want to delete this item inclusion -

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• Click on Yes.



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• The selected item will now be *removed* from the *Item Inclusions* frame.



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ITEM CONTACTS

• When you have finished working in the Items Inclusions frame, click on the *Item Contacts* tab.



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• The Item Contacts frame will be *expanded*.



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Add a Contact

- *Right click* anywhere in the first *row* of the *Item Contacts* frame.
- A *Process* menu will pop up.
- Click on *Contact* Add a contact.



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- A Process Validation message box will pop up asking;
 - Are you sure you want to add a contact to this item

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• Click on Yes.



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- A Select a contact pop up screen will appear.
- Click on the *row selector* in front of the *contact* you wish to *add*.
- Click on Ok.



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STD Standard Contact Davina Rowe Davina Rowe	
STD Standard Contact Julia Ritson Julia Ritson	
STD Standard Contact Lucinda Rowe Lucinda Rowe	
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- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address already set up on the selected contact.
- **Contact Phone Number:** This will auto populate with the phone number already set up on the selected contact.
- **Contact Mobile:** This will auto populate with the mobile number already set up on the selected contact.



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- Click in the *Contact Type* text box to reveal a drop-down arrow.
- Click on this arrow to display a *Contact Type* drop-down *menu*.
- Click on the *contact type* you wish to assign to this Item.
 - In this image *User Contact* has been selected.



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- Click in the *Contact Method* text box to reveal a drop-down arrow.
- Click on this arrow to display a *Contact Method* drop-down *menu*.
- Click on the *preferred contact method* you wish to use.
 - In this image *Email* has been selected.



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• Is Meter Contact: Click on this check box to see the contact in the relevant *month end billing run meter* capture screens and reports.



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- You can add further contacts to this frame by *right clicking* anywhere in a *row* of the *Item Contacts* frame and following the same process as above.
 - In this image a *second contact* has been added.



ng s claim header here til group by hat claim PartCode Description • CategoryDesc Modellio SerialNo AssetStep1io Location LocationDesc ShippingAddr S 92:020 92:020 Sprint Colour Multi Functional Copier Hardware 92:020 2020-9899 ARECO00083 Reception Pot 91 Leaf R • ContactName • ContactTrype ContactMethod ContactEmail ContactPhoneNumber ContactMobile IsMeterContact • SoonKing Meter Claids Contact Email jasonk@hopeworks.co.za 031 123 4567 012 345 6789 0 • Joson King Neter Contact Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email devinar@hopeworks.co.za 031 123 4567 012 345 6789 0 • ContactName • Contact • Email • Contact • Email • ContactName • ContactName • Contact • Email • ContactName • ContactName • ContactName • ContactName • ContactName • Contact • Email • ContactName • C		dk Sa	rve Layout Worl	spaces										
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		Davina	Rowe	User Contact	Email		davinar @hope	works.co.za	031 123 4567		012 345 678	89		



Delete a Contact

- You can also *delete* a contact if required.
- *Right click* in the *row* of the *contact* you wish to *delete*.
- The *Process* menu will pop up.
- Click on *Delete* Delete the contact.



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- A *Delete Row* message box will pop up asking;
 - Are you sure you want to delete this item contact

[]?

• Click on Yes.



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• The contact has now been *deleted* from the Items Contacts frame.



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• When you have finished working in the machine Item Frames, click on the *hide* button in the part code text box.



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ADD NEW LOCATION ITEM

- *Right click* in anywhere in a *row* of the *Parts* frame.
- A *Process* menu will pop up.
- Select *Location* Add New Location Item.



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- A *Select an item location* pop up screen will appear.
- Click on the *row selector* in front of the *item location* you wish to *add*.
- Click on Ok.



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- The selected item location will now populate the *Location Description* text box.
- Follow the same processes as above to *add information* to this location row as required.
 - Note: In the Items Frame, there will be no option to add Item Meters as this is a <u>Location</u> Contract not a Machine Contract.



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• You can continue to add contract machine items or contract location items as required, however additional items can also be added later.

SAVE THE CONTRACT

• When you are finished, click on *Save*.

Help v2.5.1.4 - Pg 158 - Printed: 27/06/2024



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- The new contract will be *saved* and you will return to the *Contract Listing* screen where the status defaults to *Active*.
- Click on the drop-down arrow in the status field and select the New status.



Contracts - Add (pre v2.3.0.0)

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• The new contract can be found within the *New* contract status listing screen.

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RELEASE AND APPROVE A CONTRACT

• From here the contract will need to be **Released** and then **Approved** before it becomes active.



Contracts - Add (pre v2.3.0.0)

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