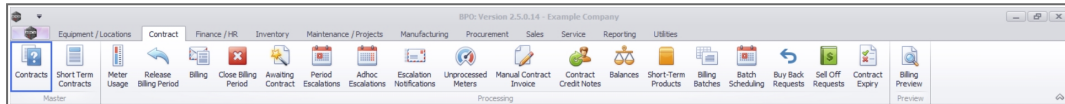


# CONTRACT

## CONTRACTS - ITEM CONTACT

**Ribbon** Select *Contract* > *Contracts*



The **Contract Listing** 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 **Active** status, listing all the **Active** contracts for the selected site.

Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save Layout

Workspaces

Save Filter

Hold

Release

Approve Contract

Release For Approval

Remove From Approval

Approve Contract

Approve Closure

Decline Closure

Close Contract

Processing

Format

Status Processing

Contract Listing

BPO: Version 2.5.0.14 - Example Company

Active

Find Serial No.

Find Contract

Refresh

Print

Export

Reports

Current

Print

Repo...

Links

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Drag a column header here to group by that column

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bills
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months			3
CO000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months			4
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months			5
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual			6
PC000001	DAN002	Dancing Shoes		PBE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months			1
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months			1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months			5
CO000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months			7
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly			5
CO000052	HOP001	Hope Works (Pty) Ltd		PBE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months			3
CO000054	APP0001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months			0
CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months			2
CO000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	Months			0
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months			6
CO000077	PRK001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months			4
CO000078	PRK001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months			4
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2019	06/05/2020	Sales Depart...	60 Months	Months			2
CO000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months			7
CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months			4
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months			8

Open Windows

User : BiancaD 21/10/2022 Version : 2.5.0.14 Example Company

- Select the **row** of the **contract** that you wish to process.

- Click on the **Edit** button.

<

The **Contract Maintenance** screen will be displayed.

Maintenance for Contract No.: CO0000016 - Status: A - BPO: Version 2.5.1.4 - Example Company

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

Save Back Save Layout Workspaces Process Format

Links: Enter text to search...

Functions: Notes, Documents, Hold History, Suspend History, Processing: Invoices, Credit Notes

Contract Info

Contract No: CO0000016

Contract Type: Cost Per Copy

Contract Class: [Dropdown]

Contract Category: [Dropdown]

Start Date: 13/06/2014

End Date: 13/06/2019

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Carolina Suzzetta Lourens van de ...

Salesman: Belinda Sharmam

Aggregate Billing: ☐

Hide Fee Detail: ☐

PartCode Description SerialNo AssetRegNo Location ShippingAddress COSAccount SLA/Rate

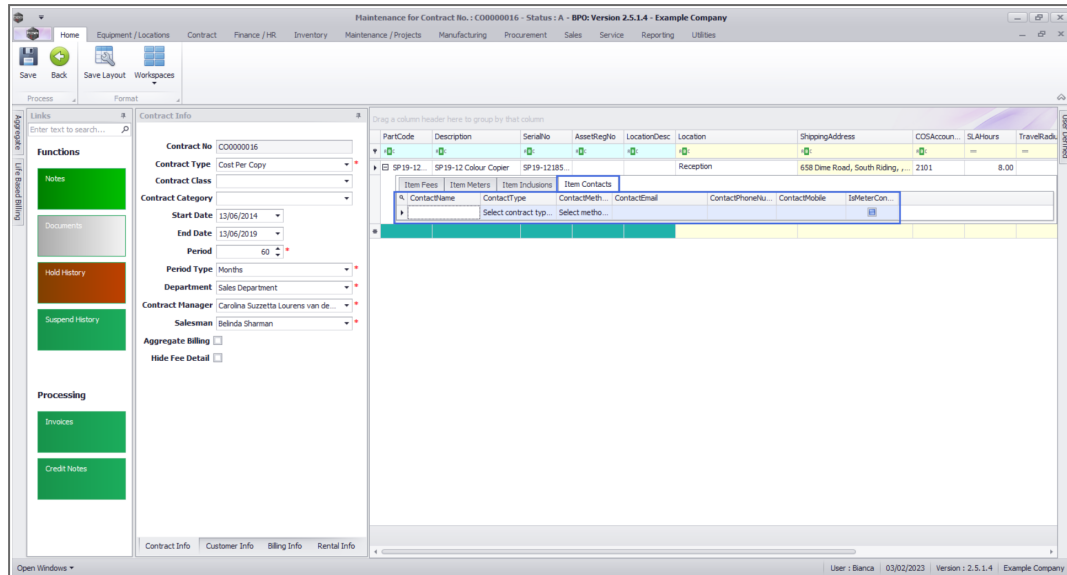
SP 19-12 SP 19-12 Colour Copier SP 19-12 185 Reception 658 Dime Road, South Riding, ... 2101

Contract Info Customer Info Billing Info Rental Info

Open Windows User : Bianca 09/02/2023 Version : 2.5.1.4 Example Company

## ITEM CONTACTS

- Ensure you have the contract item selected and then click on the **Item Contacts** tab.
- The **Item Contacts** frame will be **expanded**.

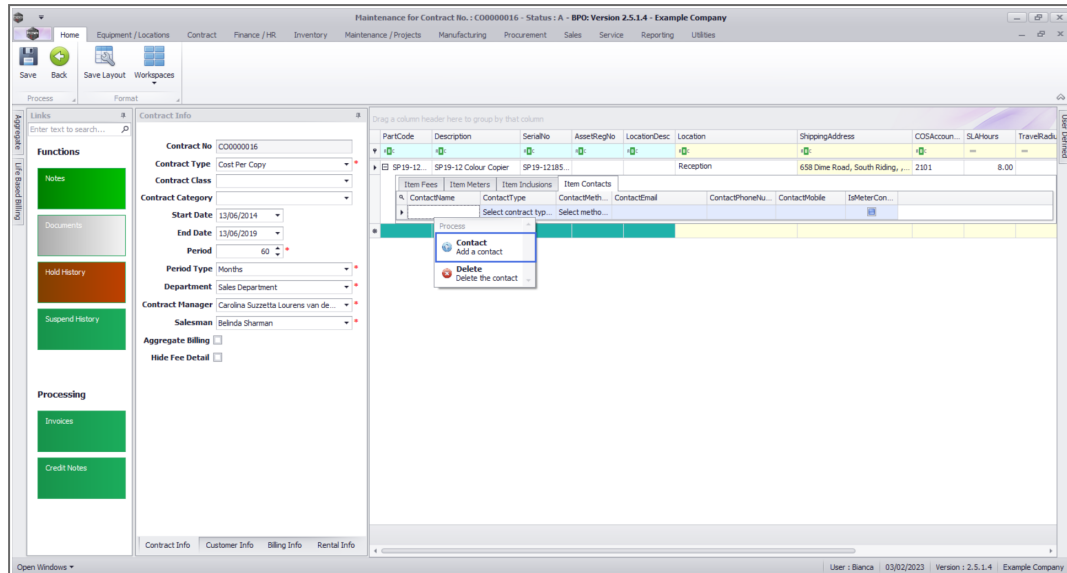


You can add up to 3 types of contacts, depending on your requirements:

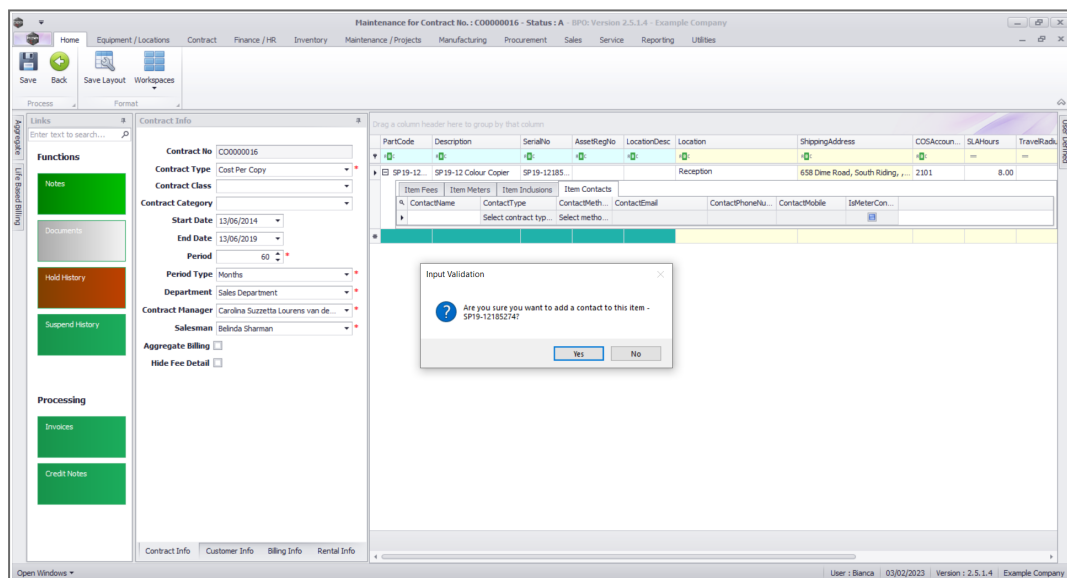
- **Manager Contact:** the client contact who manages the contract or relevant contract item
- **Meter Clicks Contact:** the client contact who will provide meter readings.
- **User Contact:** the client contact who can be called with regards to user queries.

## ADD A CONTACT

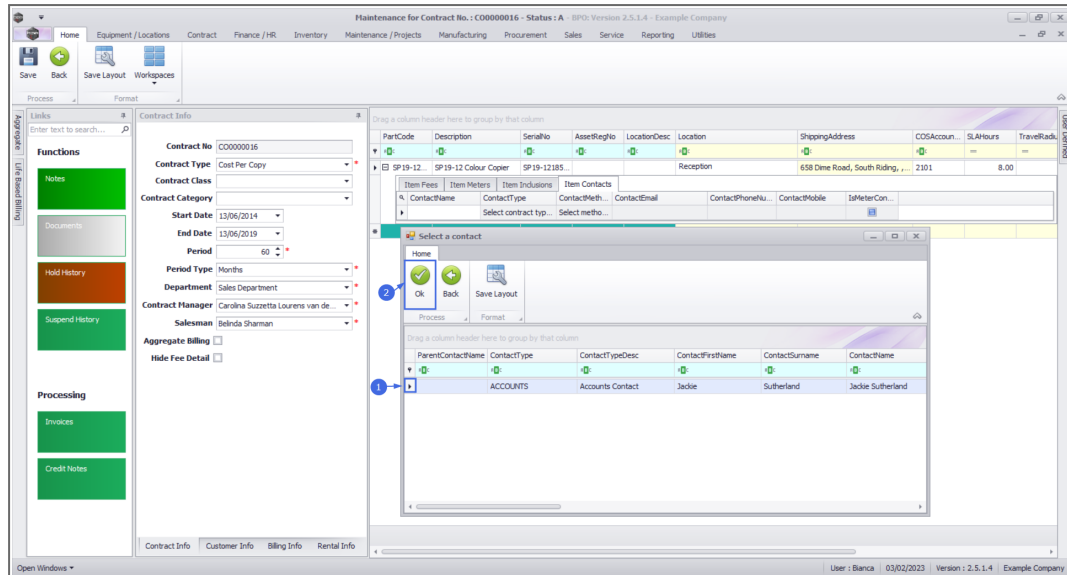
- **Right click** anywhere in the first **row** of the **Item Contacts** frame.
- A **Process** menu will pop up.
- Click on **Contact** - Add a contact.



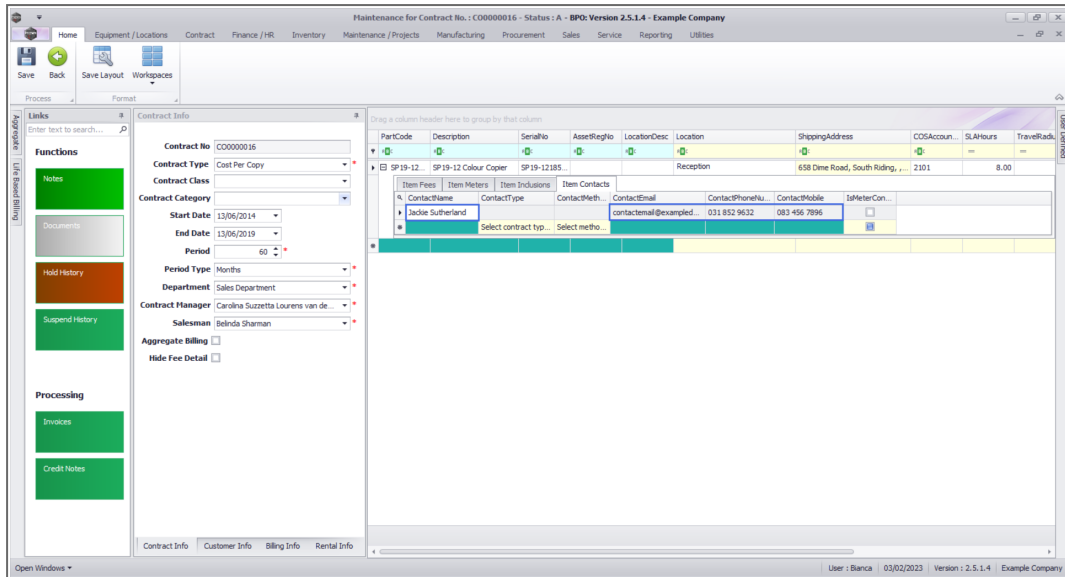
- A **Process Validation** message box will pop up asking:
  - *Are you sure you want to add a contact to this item*  
- [Serial Number or Location Description]?
- Click on **Yes**.



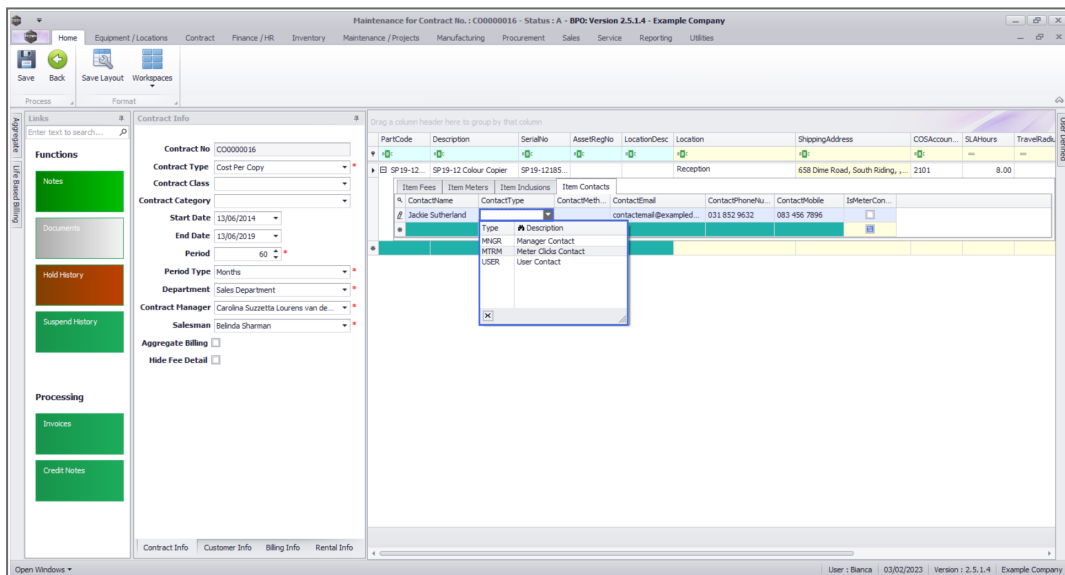
- A **Select a contact** pop up screen will appear.
- Click on the **row selector** in front of the **contact** you wish to **add**.
- Click on **Ok**.



- **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.**

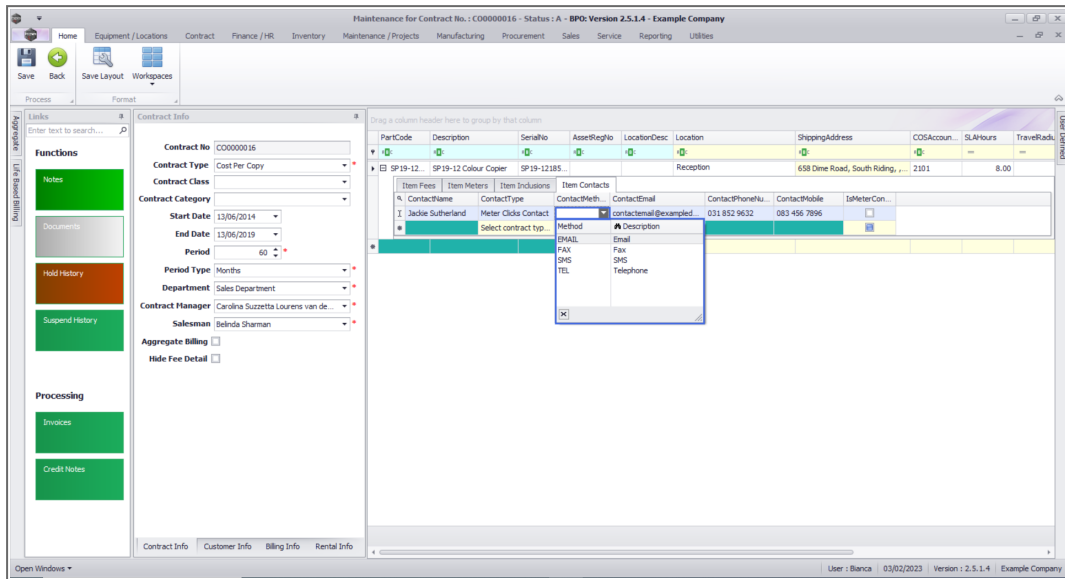


- Click in the **Contact Type** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Type** drop-down **menu**.
- Click on the **contact type** you wish to assign to this Item.



- 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.



- **Is Meter Contact:** Select this check box for the main meter contact - this is important where meter charges have been linked to the contract item, as this contact will display in the Meter Capture screens (Unprocessed Meters and Meter Usage) and will be used when sending Meter Reading Email Requests.

**Add a new Contract - BPD: Version 2.3.0.4 - TEST ALPHA - JUDITH PC LOCAL**

**Billing Info**

Billing Cycle: Months  
 Billing Period: 6  
 Billing Day: 0  
 Escalation Type: Percentage  
 Escalation Amt: 6  
 Escalation Period: 0  
 Currency: South African Rand  
 Exchange: 1.00  
 Tax Rate: 15.00

**Item Contacts**

Item Fees	Item Meters	Item Inclusions	Item Contacts
A. ContactName	ContactType	ContactMethod	ContactEmail
I. Jane Alrich	Meter Clicks Contact	Telephone	contactemail@example.com
*	Select contract type...	Select method...	

- 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.

**Maintenance for Contract No.: C00000016 - Status: A - BPD: Version 2.5.1.4 - Example Company**

**Customer Info**

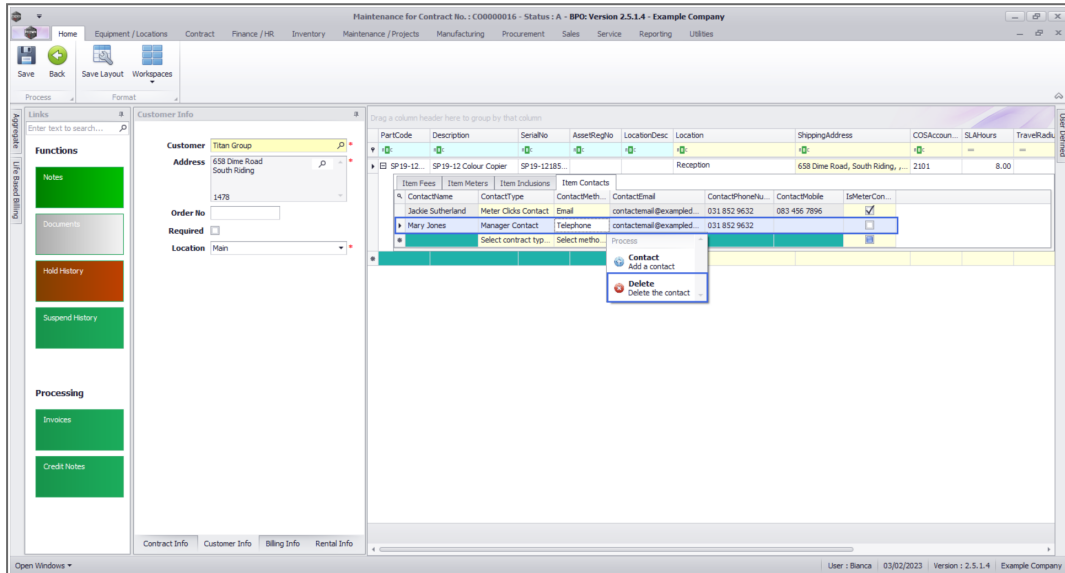
Customer: Titan Group  
 Address: 658 Dime Road South Riding  
 Order No: 1478  
 Required: ☐  
 Location: Man

**Item Contacts**

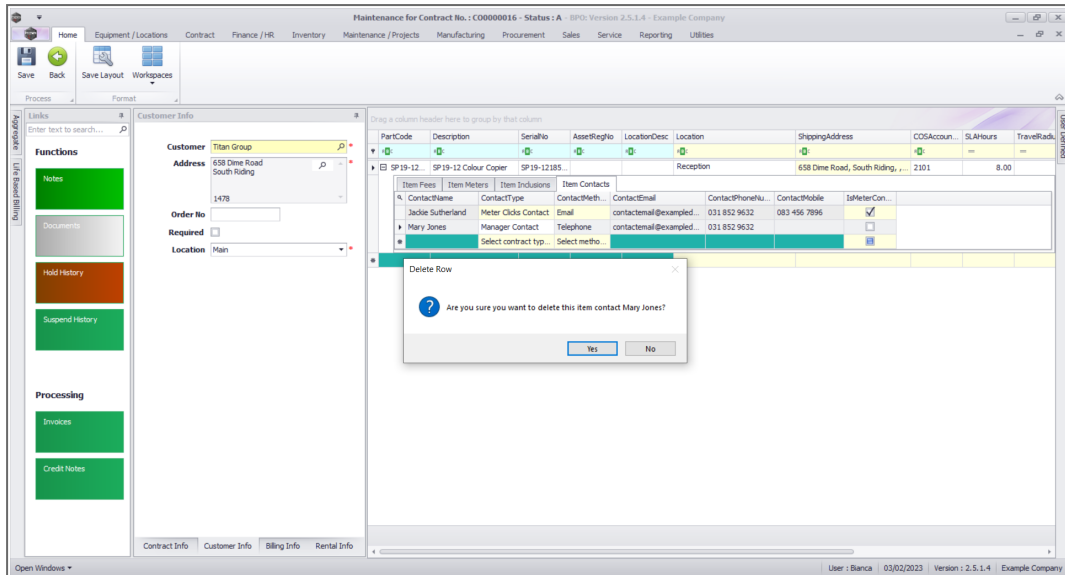
Item Fees	Item Meters	Item Inclusions	Item Contacts
A. ContactName	ContactType	ContactMethod	ContactEmail
Jackie Sutherland	Meter Clicks Contact	Email	contactemail@example.com
Mary Jones	Manager Contact	Telephone	contactemail@example.com
*	Select contract type...	Select method...	

## DELETE A CONTACT

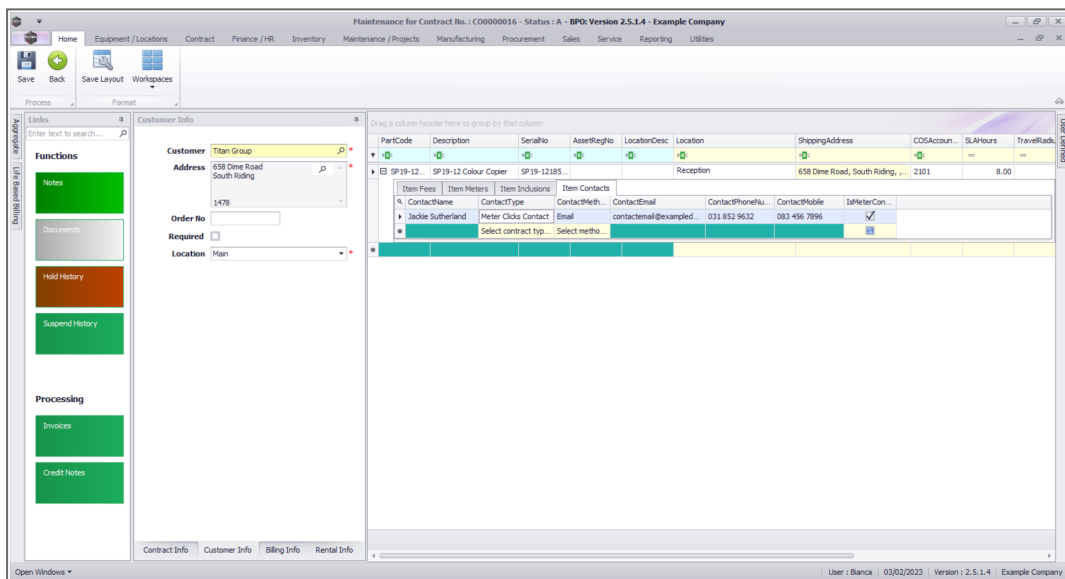
- You can also **delete** a contact if required.
- **Right click** in the **row** of the **contact** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** - Delete the contact.



- A **Delete Row** message box will pop up asking:
  - **Are you sure you want to delete this item contact [Serial Number or Location Description]?**
- Click on **Yes**.

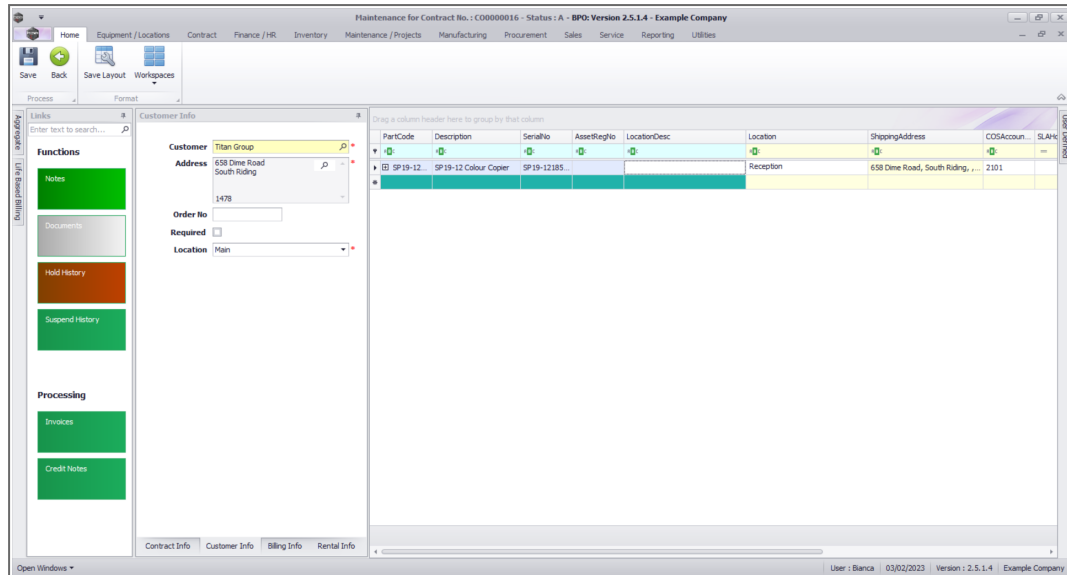


- The contact has now been **deleted** from the **Items Contacts** frame.

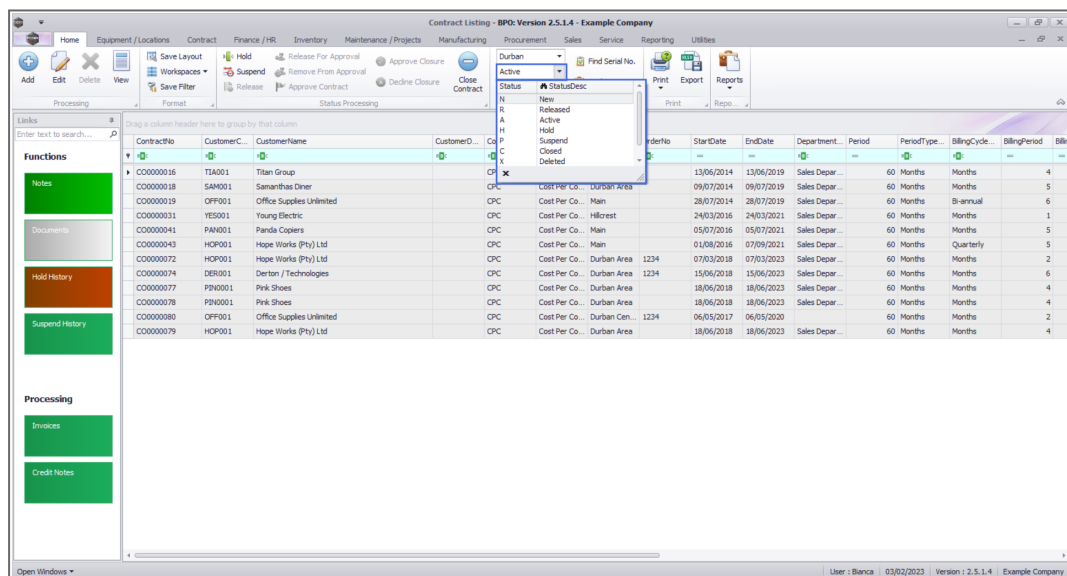


## SAVE THE CONTRACT

- When you are done, click on **Save**.



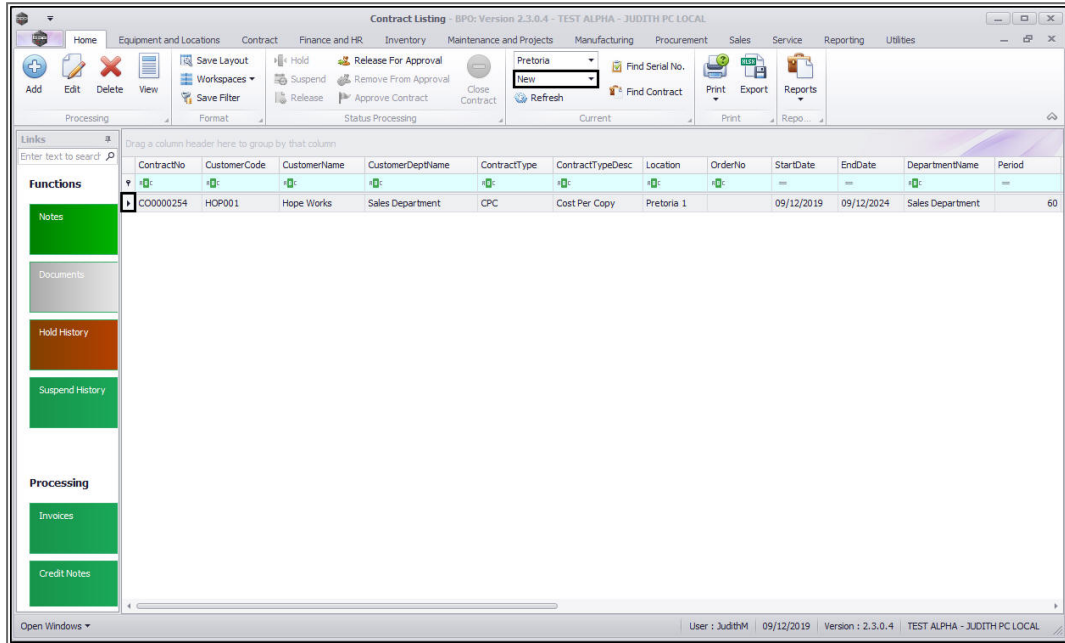
- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



ContractNo	CustomerC	CustomerName	CustomerID	CP	Status	StartDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod
C00000016	TIA001	Titan Group		CPC	Cost Per Co. - Main	13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	4	
C00000018	SAH001	Samanthas Diner		CPC	Cost Per Co. - Hillcrest	09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	5	
C00000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co. - Main	28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual	6	
C00000031	YES001	Young Electric		CPC	Cost Per Co. - Main	24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	1	
C00000041	PAN001	Panda Copiers		CPC	Cost Per Co. - Main	05/07/2016	05/07/2021	Sales Depart...	60 Months	Months	5	
C00000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co. - Main	01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	5	
C00000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co. - Durban Area	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	2	
C00000074	DER001	Derton / Technologies		CPC	Cost Per Co. - Durban Area	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	6	
C00000077	PIH0001	Pink Shoes		CPC	Cost Per Co. - Durban Area	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4	
C00000078	PIH0001	Pink Shoes		CPC	Cost Per Co. - Durban Area	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4	
C00000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co. - Durban Cen...	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months	2	
C00000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co. - Durban Area	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4	

- **New** contracts can be found within the **New** contract status listing screen.

- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- **Edited** contracts may either remain in **Active** status or move to **Released** status in order for changes to be reviewed before **Approval** depending on the change made.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	DepartmentName	Period
CO0000254	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Pretoria 1		09/12/2019	09/12/2024	Sales Department	60

MNU.112.003

