

CONTRACT

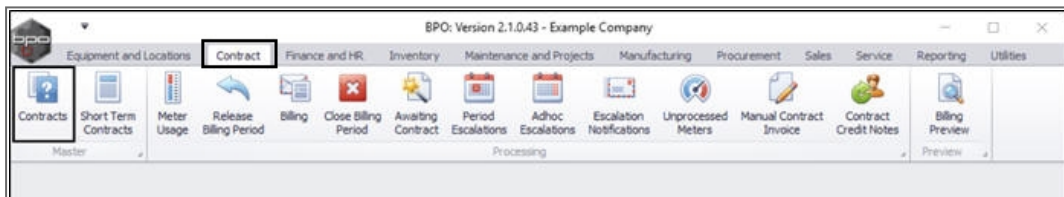
CONTRACTS - NOTES

Notes can be viewed and added to a contract from the following screens:

- **Contract Listing**
- **Add New Contract**
- **Contract Maintain**

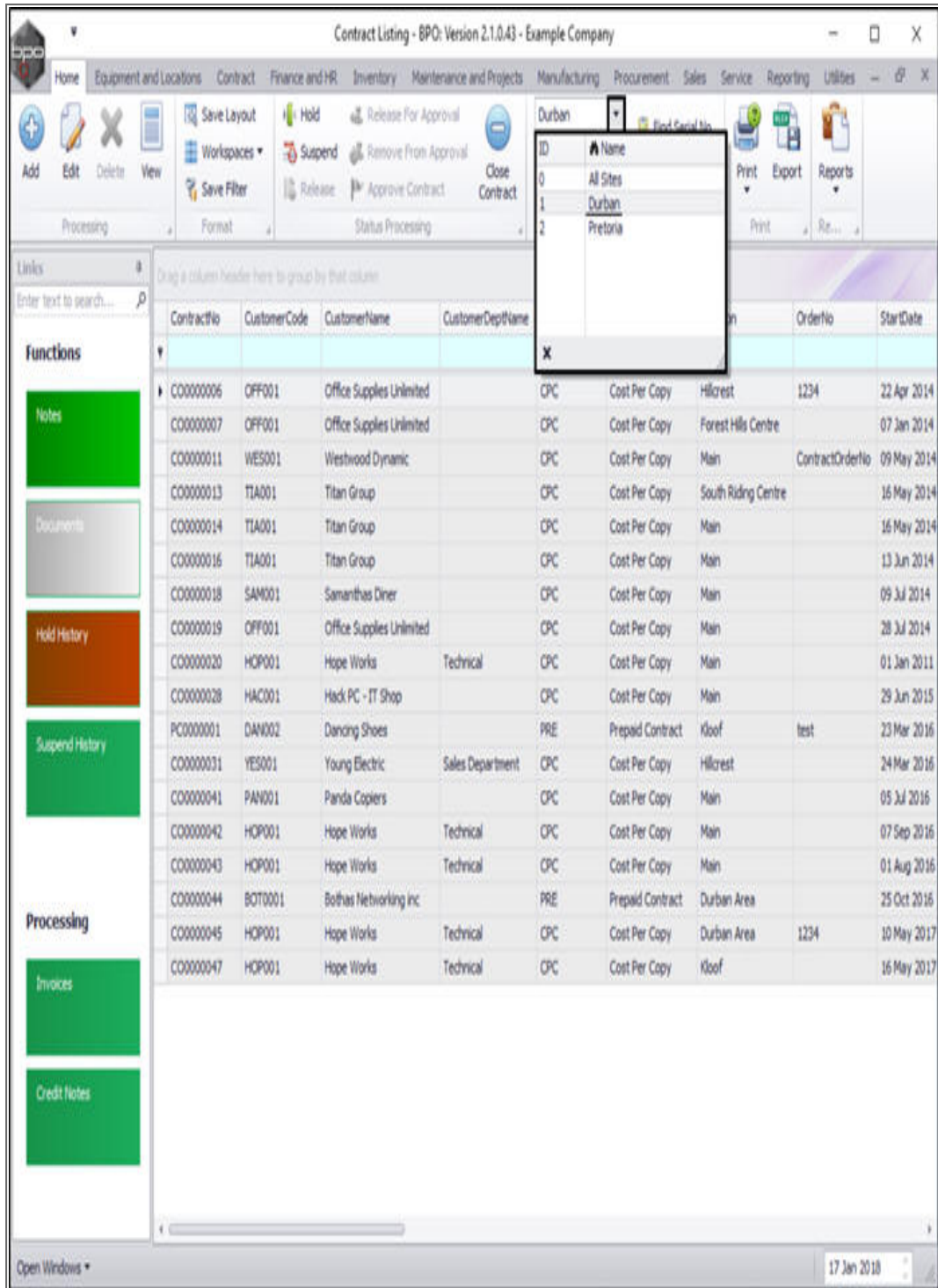
These Notes cannot be deleted or edited.

Ribbon Access: *Contract > Contracts*



The ***Contract Listing*** screen will display.

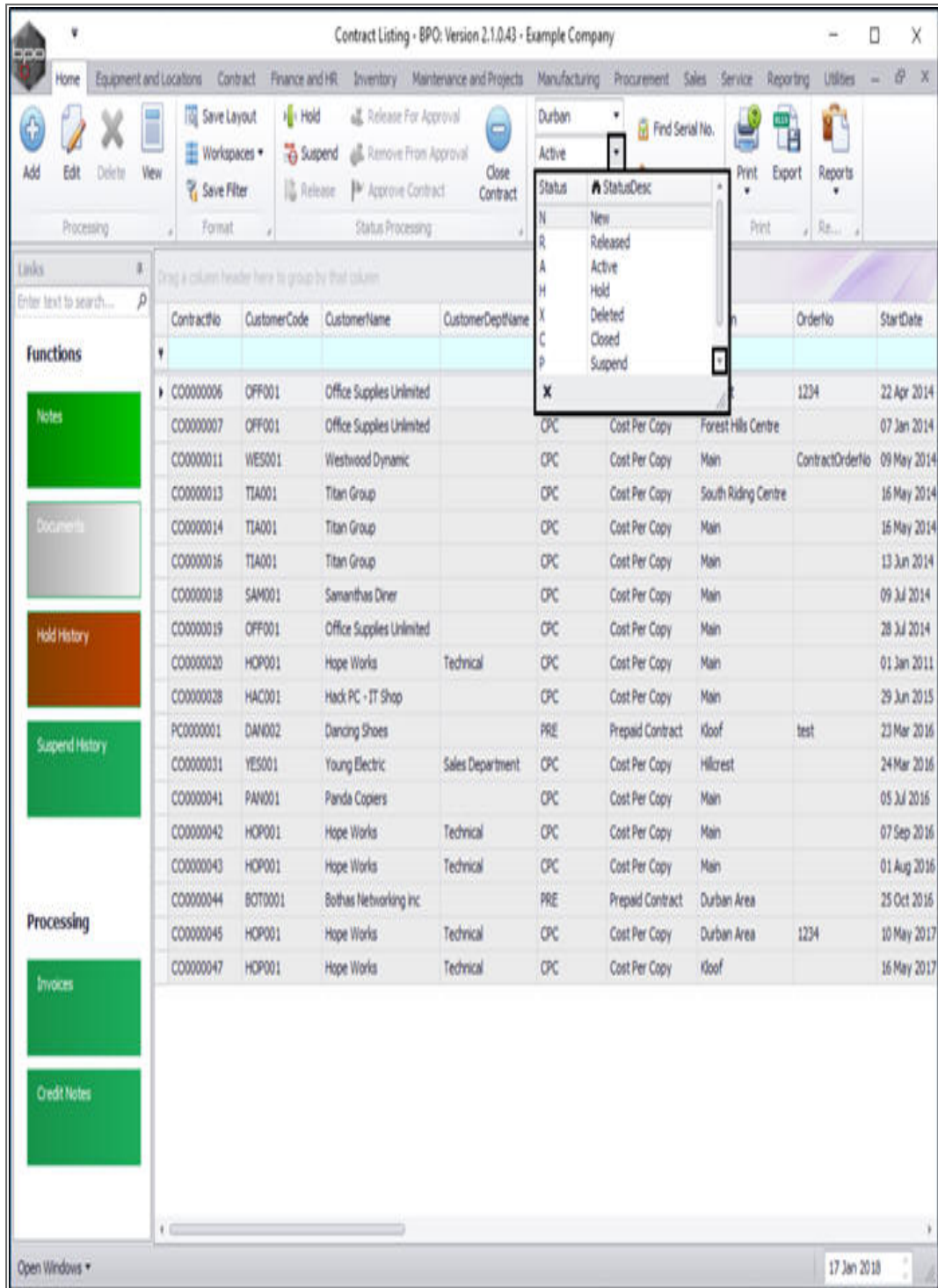
- Select the ***Site*** that you wish to work in.
 - In this example, ***Durban*** has been selected.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Hikrest
CO000007	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Forest Hills Centre
CO000011	WES001	Westwood Dynamic	CPC	Cost Per Copy	Main
CO000013	TIA001	Titan Group	CPC	Cost Per Copy	South Riding Centre
CO000014	TIA001	Titan Group	CPC	Cost Per Copy	Main
CO000016	TIA001	Titan Group	CPC	Cost Per Copy	Main
CO000018	SAM001	Samanthas Diner	CPC	Cost Per Copy	Main
CO000019	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Main
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy
CO000028	HAC001	Hack PC - IT Shop	CPC	Cost Per Copy	Main
PC000001	DAN002	Dancing Shoes	PRE	Prepaid Contract	Kloof
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy
CO000041	PAN001	Panda Copiers	CPC	Cost Per Copy	Main
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy
CO000044	BOT001	Botbas Networking Inc	PRE	Prepaid Contract	Durban Area
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy

- By default, this screen will list all the **Active** contracts for the selected site.

- You can click on the **drop-down arrow** in the **Status** field and select an *alternative* Status if required.



The screenshot displays the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' application. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar below the menu contains icons for Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Hold, Release For Approval, Suspend, Remove From Approval, Release, Approve Contract, and Close Contract. A left sidebar shows 'Functions' (Notes, Documents, Hold History, Suspend History) and 'Processing' (Invoices, Credit Notes). The main area features a table with columns: ContractNo, CustomerCode, CustomerName, CustomerDeptName, Status, StatusDesc, OrderNo, and StartDate. A dropdown menu is open over the 'Status' column, showing options: New, Released, Active, Hold, Deleted, Closed, and Suspend. The table contains 20 rows of contract data.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	Status	StatusDesc	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited				1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre	07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo 09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre	16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main	16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main	13 Jun 2014
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main	09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main	28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main	29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test 23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest	24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main	05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Aug 2016
CO000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area	25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234 10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof	16 May 2017

VIEW NOTES

- Select the **row** of the contract where you wish to **view** the notes.
- Click on the **Notes** tile.

Help v2.5.1.4 - Pg 5 - Printed: 27/06/2024

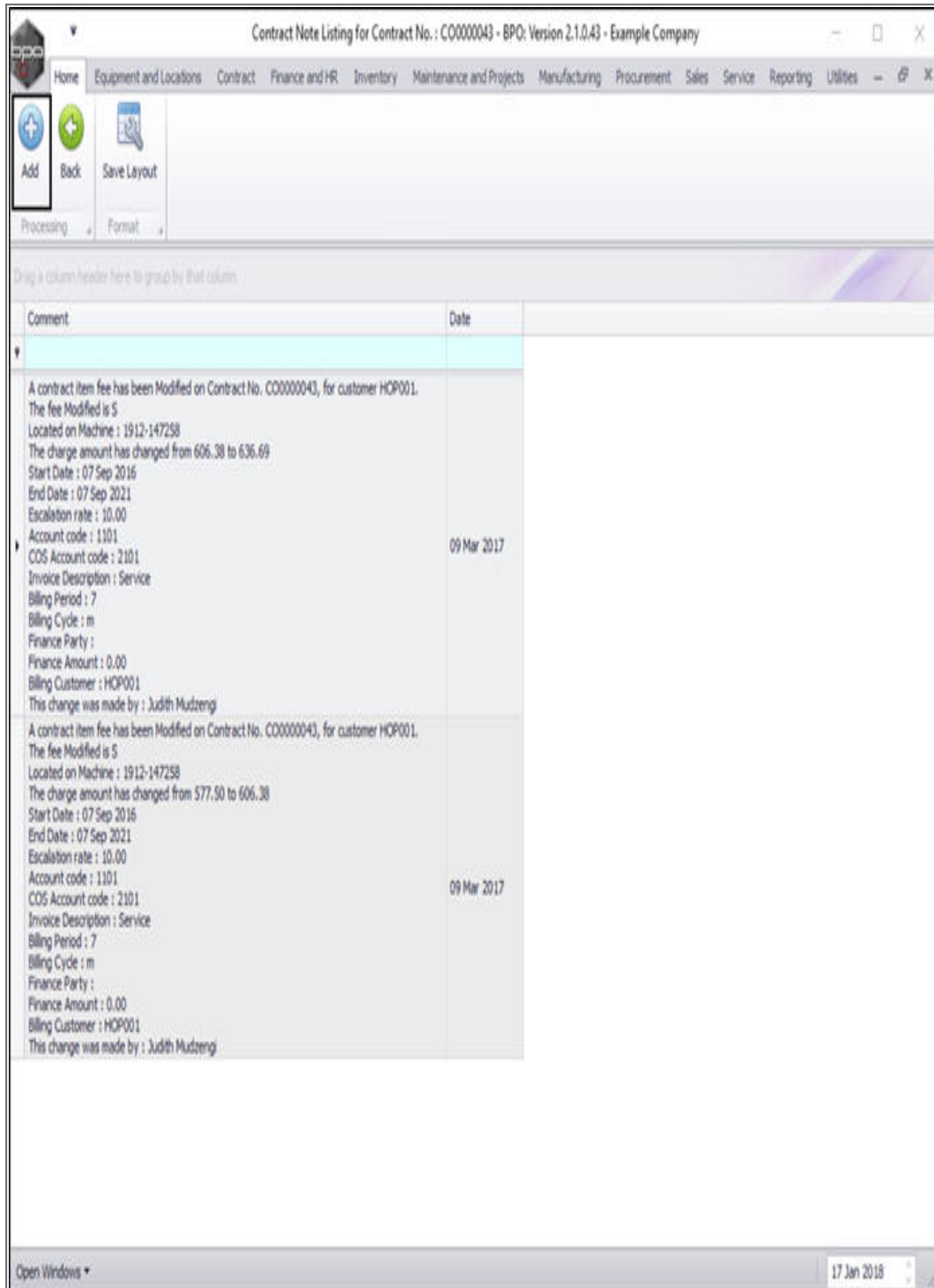
- The ***Contract Note Listing For Contract No.: []*** screen will open.
- Here you can **view** all the **Notes** and **Comments** that have been linked to this contract.

Note: You cannot edit or delete any information in the **Comments** data grid in this screen.

Contract Note Listing for Contract No. : CO0000043 - BPO; Version 2.1.0.43 - Example Company	
<div> <div>Home</div> <div>Equipment and Locations</div> <div>Contract</div> <div>Finance and HR</div> <div>Inventory</div> <div>Maintenance and Projects</div> <div>Manufacturing</div> <div>Procurement</div> <div>Sales</div> <div>Service</div> <div>Reporting</div> <div>Utilities</div> </div> <div> <div>Add</div> <div>Back</div> <div>Save Layout</div> </div> <div> <div>Processing</div> <div>Format</div> </div>	
Drag a column header here to group by that column	
Comment	Date
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.</p> <p>The fee Modified is \$</p> <p>Located on Machine : 1912-147258</p> <p>The charge amount has changed from 606.38 to 636.69</p> <p>Start Date : 07 Sep 2016</p> <p>End Date : 07 Sep 2021</p> <p>Escalation rate : 10.00</p> <p>Account code : 1101</p> <p>COS Account code : 2101</p> <p>Invoice Description : Service</p> <p>Billing Period : 7</p> <p>Billing Cycle : m</p> <p>Finance Party :</p> <p>Finance Amount : 0.00</p> <p>Billing Customer : HOP001</p> <p>This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.</p> <p>The fee Modified is \$</p> <p>Located on Machine : 1912-147258</p> <p>The charge amount has changed from 577.50 to 606.38</p> <p>Start Date : 07 Sep 2016</p> <p>End Date : 07 Sep 2021</p> <p>Escalation rate : 10.00</p> <p>Account code : 1101</p> <p>COS Account code : 2101</p> <p>Invoice Description : Service</p> <p>Billing Period : 7</p> <p>Billing Cycle : m</p> <p>Finance Party :</p> <p>Finance Amount : 0.00</p> <p>Billing Customer : HOP001</p> <p>This change was made by : Judith Mudzengi</p>	09 Mar 2017
Open Windows ▾	
17 Jan 2018	

ADD NOTE

- Click on **Add**.



Contract Note Listing for Contract No.: CO0000043 - BPO; Version 2.1.0.43 - Example Company

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

Add Back Save Layout

Processing Format

Drag a column header here to group by that column

Comment	Date
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.</p> <p>The fee Modified is \$</p> <p>Located on Machine : 1912-147258</p> <p>The charge amount has changed from 606.38 to 636.69</p> <p>Start Date : 07 Sep 2016</p> <p>End Date : 07 Sep 2021</p> <p>Escalation rate : 10.00</p> <p>Account code : 1101</p> <p>COS Account code : 2101</p> <p>Invoice Description : Service</p> <p>Billing Period : 7</p> <p>Billing Cycle : m</p> <p>Finance Party :</p> <p>Finance Amount : 0.00</p> <p>Billing Customer : HOP001</p> <p>This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.</p> <p>The fee Modified is \$</p> <p>Located on Machine : 1912-147258</p> <p>The charge amount has changed from 577.50 to 606.38</p> <p>Start Date : 07 Sep 2016</p> <p>End Date : 07 Sep 2021</p> <p>Escalation rate : 10.00</p> <p>Account code : 1101</p> <p>COS Account code : 2101</p> <p>Invoice Description : Service</p> <p>Billing Period : 7</p> <p>Billing Cycle : m</p> <p>Finance Party :</p> <p>Finance Amount : 0.00</p> <p>Billing Customer : HOP001</p> <p>This change was made by : Judith Mudzengi</p>	09 Mar 2017

Open Windows 17 Jan 2018

The **Contract: []** screen will open. You can view the following details:

- **Note Date and Time:** This will auto populate with the current date.
 - You can either type in, or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Employee:** This will auto populate with the person currently logged on to the system.
 - You can click on the drop-down arrow and select an alternative person, if required.
- **Note:** Type in details relevant to this contract.

Contract : CO0000043 - BPO; Version 2.1.0.43 - Example Company

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

Save Back

Process

Note Date and Time18 Jan 2018

EmployeeSarah Milder

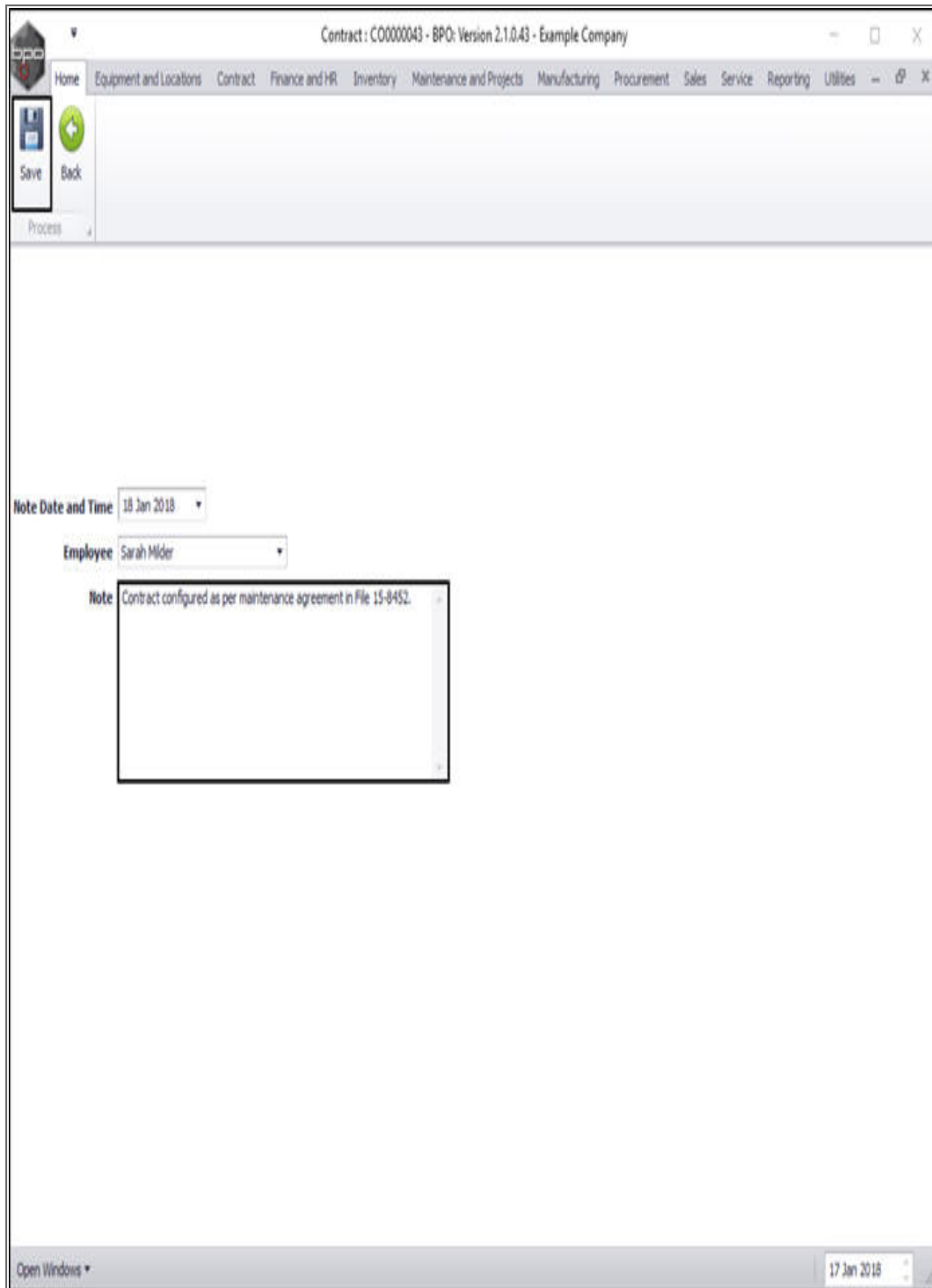
Note

Open Windows

17 Jan 2018

SAVE NOTE

- When you have finished adding your note, click on **Save**.



Contract : CO0000043 - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

Note Date and Time: 18 Jan 2018

Employee: Sarah Milder

Note: Contract configured as per maintenance agreement in File 15-8452.

Open Windows 17 Jan 2018

- You will return to the ***Contract Note Listing for Contract No.:*** screen.
- A ***Contract Processing*** message box will pop up advising the following:
 - *Note has been added to Contract No: []*.
- Click on **OK**.

CO3 Technologies (Pty) Ltd © Company Confidential

VIEW ADDED NOTE

- You can now view the newly added note.
- Click on ***Back*** to return to the ***Contract Listing*** screen.

Contract Note Listing for Contract No. : CO0000043 - BPO: Version 2.1.0.43 - Example Company

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

Add Back Save Layout

Processing Format

Drag a column header here to group by that column

Comment	Date
Contract configured as per maintenance agreement in File 15-8452.	18 Jan 2018
A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 606.38 to 636.69 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HOP001 This change was made by : Judith Mudzengi	09 Mar 2017
A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 577.50 to 606.38 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HOP001 This change was made by : Judith Mudzengi	09 Mar 2017

Open Windows 17 Jan 2018

MNU.112.005

