

CONTRACT

CONTRACTS - EDIT

Contracts give you the ability to effectively manage your customer billing.

Contracts can only be edited when in the **New** or **Active** states.

If certain amendments are done on an Active contract, it will move back to **Released** state, to be checked and *re-approved*.

An email will be sent to all users who have the rights to authorise (i.e. [Release](#) and [Approve](#)) a contract.

The types of changes that would trigger the contract to be placed back into the **Released** state include:

- Change Contract Type
- Change Customer
- Aggregate Billing flag
- If any contract item is added
- If any contract item is removed
- If any contract item fee is added
- If any contract item fee is removed
- Change of Billing Customer on a fee
- Change of Billing Customer on a meter

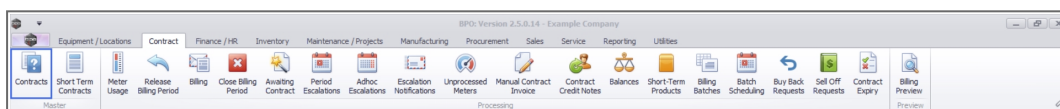
And if the following types of changes are made to the Contract Item Fees:

- Amount
- Start Date
- End Date
- Escalation %
- Account Code

- COS Account Code
- Invoice Description
- Billing Period
- Billing Cycle
- Finance Party
- Finance Amount

Note: As you can only edit a contract in the **Active** or **New** status - the contract you wish to edit will either be in this state or the New State.

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.

Contract Listing - BPO: Version 2.5.0.14 - Example Company

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

Save Layout Workspaces Add Edit Delete View Save Filter Hold Suspend Release For Approval Remove From Approval Approve Closure Close Contract Active Find Serial No. Refresh Find Contract Print Export Reports

Processing Format Status Processing Current Print Repo

Links Drag a column header here to group by that column

Functions Notes Documents Hold History Suspend History Processing Invoices Credit Notes

ContractNo	CustomerC	CustomerName	CustomerO	ContractType	ContractTy	Location	OrderNo	StarDate	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	Months	3	
CO000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	Months	4	
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	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	Months	6	
PC000001	DAN002	Dancing Shoes		PBE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000031	YE001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60 Months	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	Months	7	
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	Months	5	
CO000052	HOP001	Hope Works (Pty) Ltd		PBE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months	Months	3	
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	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	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	Months	0	
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	Months	6	
CO000077	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000078	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	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	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	Months	4	
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months	Months	8	

Open Windows

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

SELECT THE CONTRACT

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

Contract Listing - BPO: Version 2.5.0.14 - Example Company

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

Save Layout Workspaces Add Edit Delete View Save Filter Hold Suspend Release For Approval Remove From Approval Approve Closure Close Contract Active Find Serial No. Refresh Find Contract Print Export Reports

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Functions Notes Documents Hold History Suspend History Processing Invoices Credit Notes

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PC000001	DAN002	Dancing Shoes		PBE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000031	YE001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months	1	
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CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	Months	5	
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CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	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	Months	0	
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CO000077	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000078	PRN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	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	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	Months	4	
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months	Months	8	

Open Windows

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

- Click on the **Edit** button.

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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: [v]

Contract Category: [v]

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 Sharnan

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

EDIT CONTRACT DETAILS

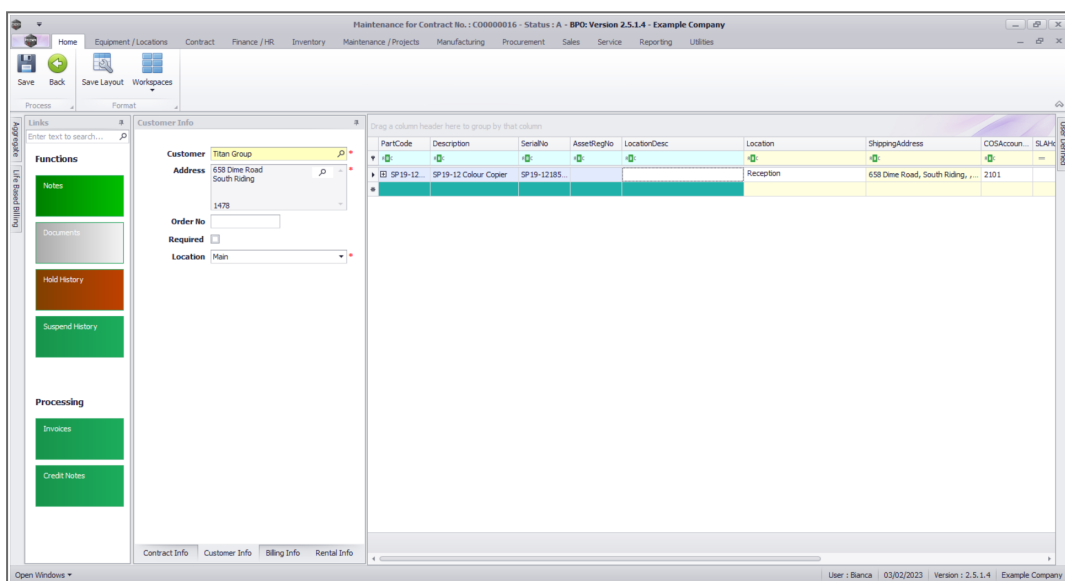
- The **Maintenance for Contract No. : [] - Status: []** screen will open.
- Edit the details, as required.

- Expand the **Information tabs** on the left-hand side of the screen, if those frames contain details that need to be changed.
- Expand the **Items data grids**, if there are details there, which need to be changed.

SAVE CHANGES

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.

Contract Listing - BPO: Version 2.5.1.4 - Example Company

Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

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Reporting

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- **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.

Contract Listing - BPO: Version 2.3.0.4 - TEST ALPHA - JUDITH PC LOCAL

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

Add Edit Delete View Save Layout Workspaces Save Filter Processing Format Status Processing

Hold Release For Approval Suspend Remove From Approval Approve Contract Close Contract

Pretoria New Find Serial No. Refresh Find Contract Print Export Reports

Links Enter text to search Drag a column header here to group by that column

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

Functions

- Notes
- Documents
- Hold History
- Suspend History

Processing

- Invoices
- Credit Notes

Open Windows User: JudithM 09/12/2019 Version: 2.3.0.4 TEST ALPHA - JUDITH PC LOCAL

MNU.112.009

