

CONTRACT

CONTRACTS – APPROVE A CONTRACT

A new contract will need to first be **Released** and then **Approved** before it will become **Active**.

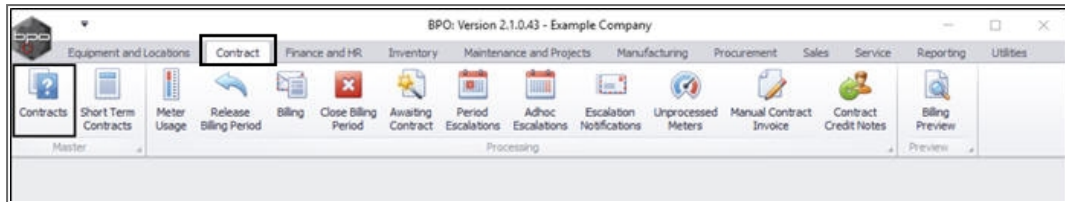
However, after a contract has been **Approved**, it could be moved back to the **Released** status due to contract amendments, so that the changes can be reviewed and then it will need to be **Approved** again.

A notification email will be sent to users who have the rights to authorise contracts.

These are the types of changes that will trigger the contract being *returned* to the **Released** status:

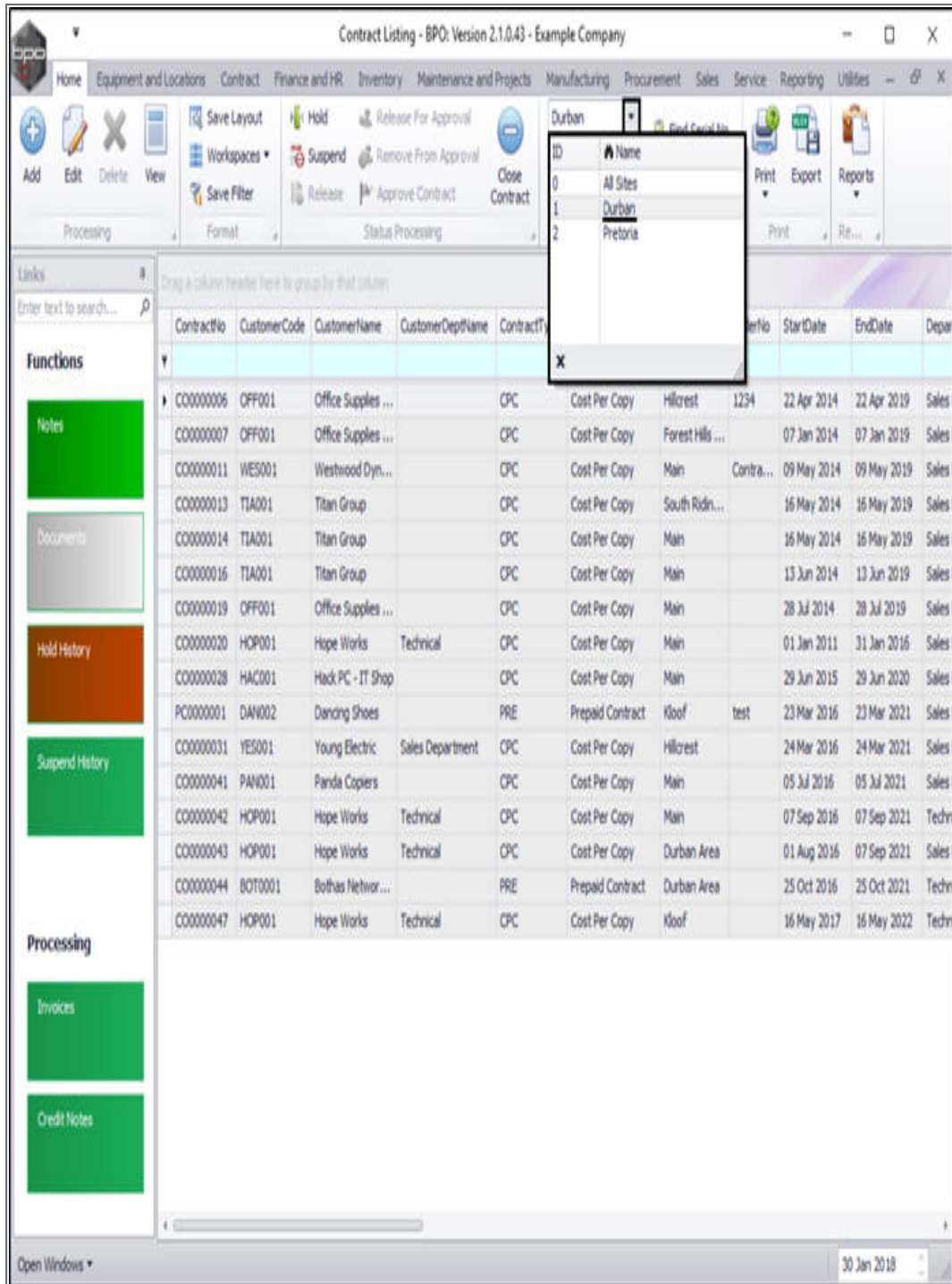
- any changes to the **Contract Type**, the **Customer** or the **Aggregate Billing flag**.
- if any contract **item** is added or removed
- if any contract item **fee** is added or removed.
- any changes to the **Billing Customer** on a fee or meter.
- any changes to the following **Contract Item Fee** details:
 - Amount, Start Date, End Date, Escalation %, Account Code, COS Account Code, Invoice Description, Billing Period, Billing Cycle, Finance Party, and Finance Amount.

Ribbon Access: *Contract > Contracts*



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

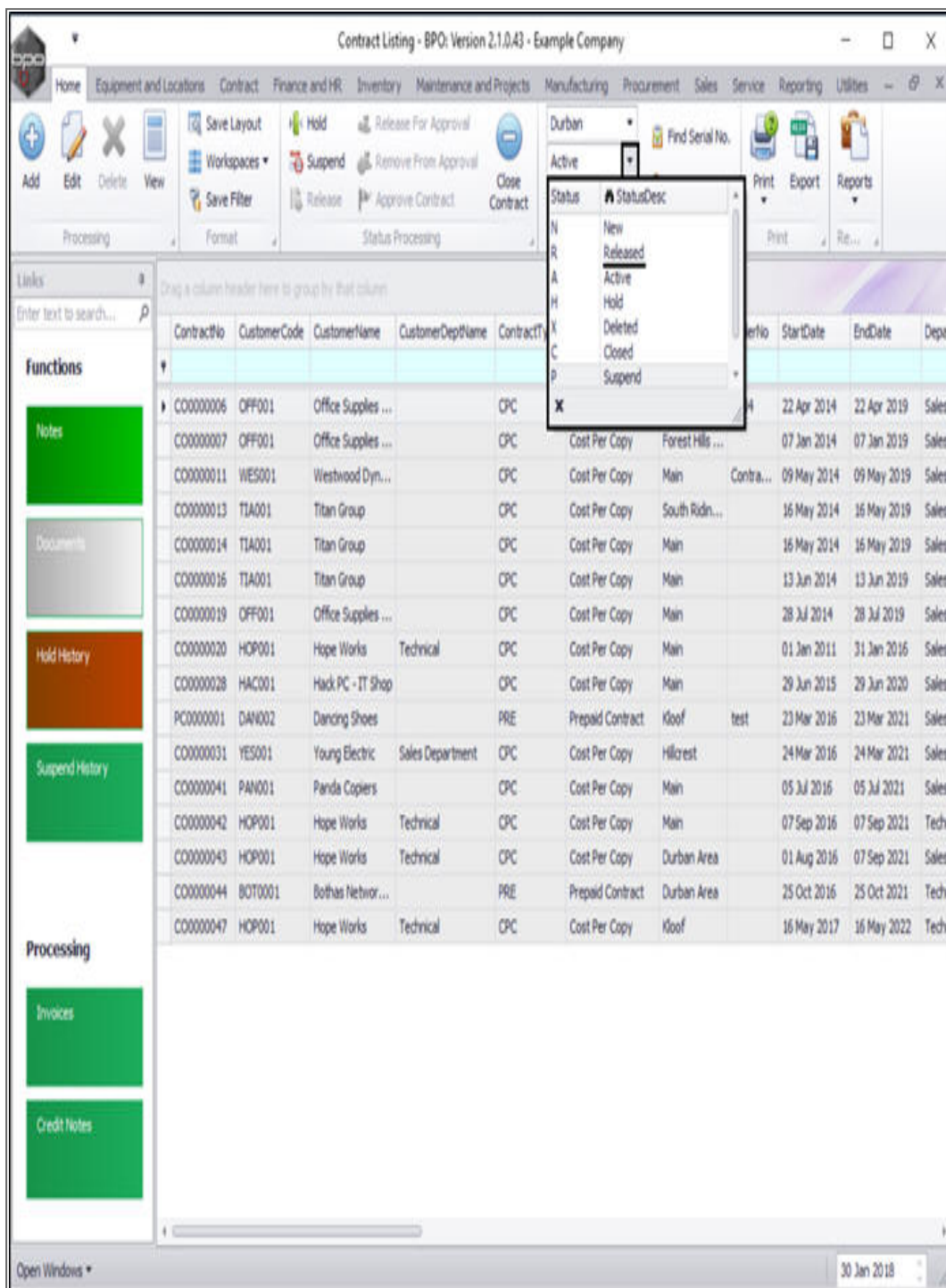
- Select the ***Site*** that you wish to work in.
 - In this image ***Durban*** has been selected.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	Cost Per Copy	Location	ContractNo	StartDate	EndDate	Department
CO0000006	OFF001	Office Supplies ...		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supplies ...		CPC	Cost Per Copy	Forest Hills ...		07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dyn...		CPC	Cost Per Copy	Main	Contra...	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	Sales
CO0000019	OFF001	Office Supplies ...		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	Techn
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO0000044	BOT0001	Bothas Networ...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Techn
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	Techn

- Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

- Click on the **drop-down arrow** in the **Status** field and select the **Released** status.



The screenshot shows the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' window. The 'Status' dropdown menu is open, showing options: New, Released, Active, Hold, Deleted, Closed, and Suspend. The 'Released' option is highlighted. The main table displays contract details with columns: ContractNo, CustomerCode, CustomerName, CustomerDeptName, ContractType, Status, StatusDesc, UserNo, StartDate, EndDate, and Department.

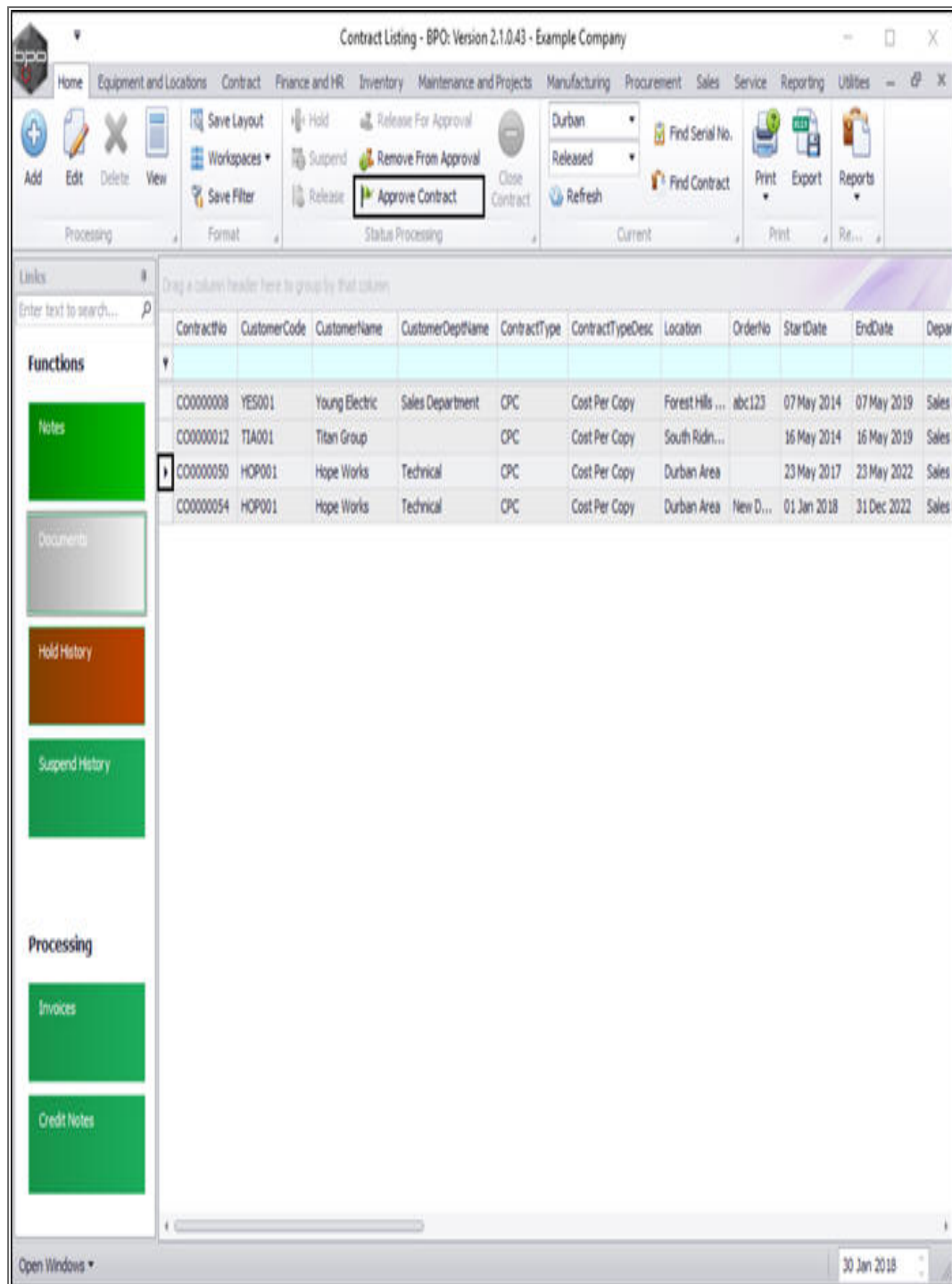
ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	Status	StatusDesc	UserNo	StartDate	EndDate	Department
CO0000006	OFF001	Office Supplies ...		CPC	Released			22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supplies ...		CPC	Released	Cost Per Copy	Forest Hills ...	07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dyn...		CPC	Released	Cost Per Copy	Main	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Released	Cost Per Copy	South Ridn...	16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Released	Cost Per Copy	Main	16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Released	Cost Per Copy	Main	13 Jun 2014	13 Jun 2019	Sales
CO0000019	OFF001	Office Supplies ...		CPC	Released	Cost Per Copy	Main	28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Released	Cost Per Copy	Main	01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Released	Cost Per Copy	Main	29 Jun 2015	29 Jun 2020	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Released	Prepaid Contract	Kloof	23 Mar 2016	23 Mar 2021	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Released	Cost Per Copy	Hillcrest	24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Released	Cost Per Copy	Main	05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Released	Cost Per Copy	Main	07 Sep 2016	07 Sep 2021	Techn
CO0000043	HOP001	Hope Works	Technical	CPC	Released	Cost Per Copy	Durban Area	01 Aug 2016	07 Sep 2021	Sales
CO0000044	BOT0001	Bothas Networ...		PRE	Released	Prepaid Contract	Durban Area	25 Oct 2016	25 Oct 2021	Techn
CO0000047	HOP001	Hope Works	Technical	CPC	Released	Cost Per Copy	Kloof	16 May 2017	16 May 2022	Techn

SELECT THE CONTRACT

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

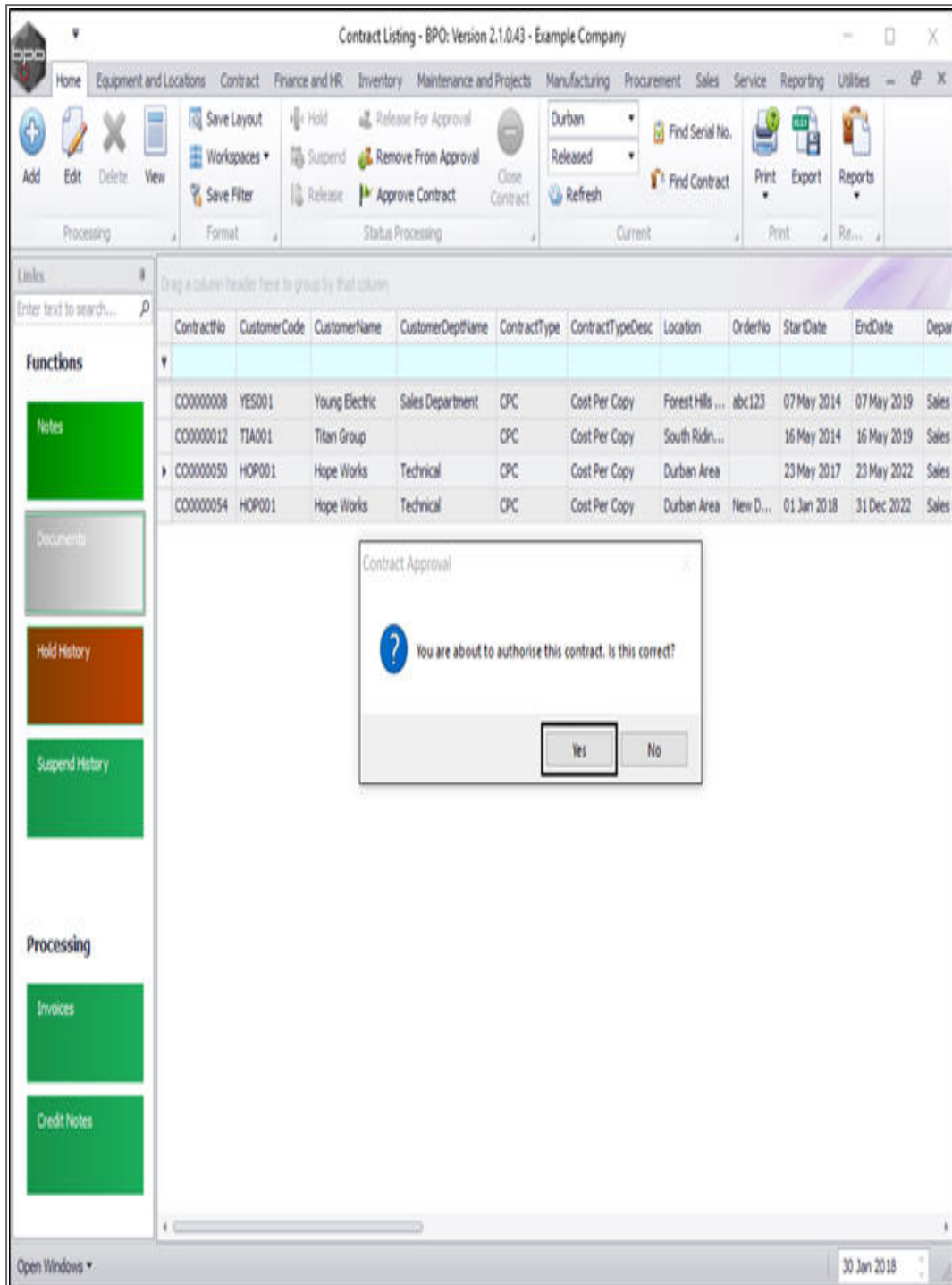
APPROVE CONTRACT

- Click on **Approve Contract**.



- A **Contract Approval** message box will pop up with the following prompt:

- *You are about to authorise this contract. Is that correct?*
- Click on **Yes**.



The screenshot shows 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. Below the menu is a toolbar with various actions such as Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Hold, Release For Approval, Suspend, Remove From Approval, Release, Approve Contract, Close Contract, Refresh, Find Serial No., Find Contract, Print, Export, and Reports.

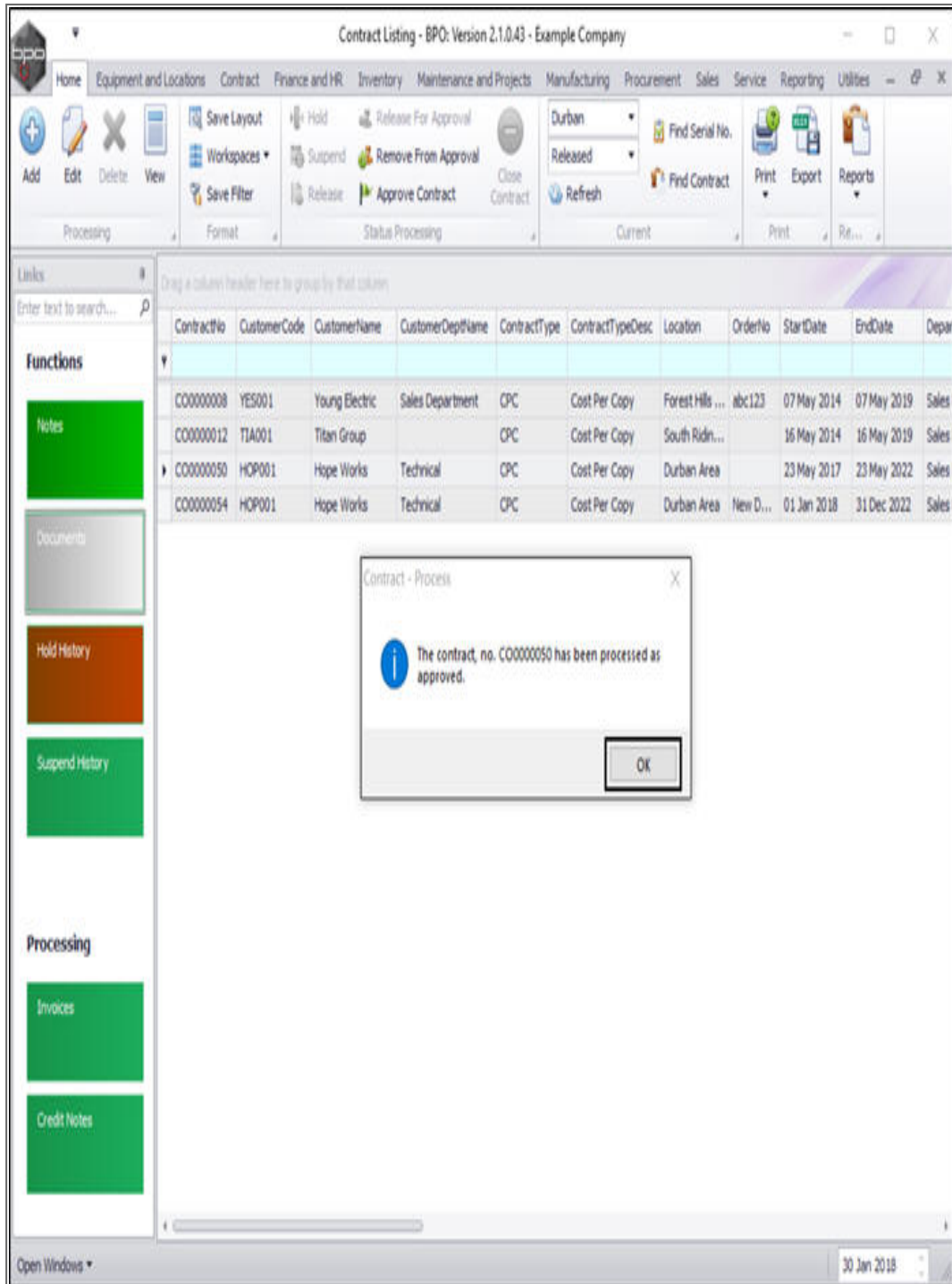
On the left side, there is a 'Functions' panel with buttons for Notes, Documents, Hold History, Suspend History, Invoices, and Credit Notes. Below this is a 'Processing' section with buttons for Invoices and Credit Notes.

The main area displays a table of contracts. The table has columns: ContractNo, CustomerCode, CustomerName, CustomerDeptName, ContractType, ContractTypeDesc, Location, OrderNo, StartDate, EndDate, and Department. The data rows are as follows:

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Department
CO0000008	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Forest Hills ...	abc123	07 May 2014	07 May 2019	Sales
CO0000012	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO0000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales
CO0000054	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	New D...	01 Jan 2018	31 Dec 2022	Sales

A 'Contract Approval' dialog box is open in the center of the screen. It contains a question mark icon and the text: 'You are about to authorise this contract. Is this correct?'. There are two buttons at the bottom: 'Yes' and 'No'.

- A **Contract - Process** message box will pop up advising the following:
 - *The contract, no. [] has been processed as approved.*
- Click on **OK**.



Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

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

Links: Enter text to search...

Functions: Notes, Documents, Hold History, Suspend History

Processing: Invoices, Credit Notes

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Depart
CO0000008	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Forest Hills ...	abc123	07 May 2014	07 May 2019	Sales
CO0000012	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO0000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales
CO0000054	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	New D...	01 Jan 2018	31 Dec 2022	Sales

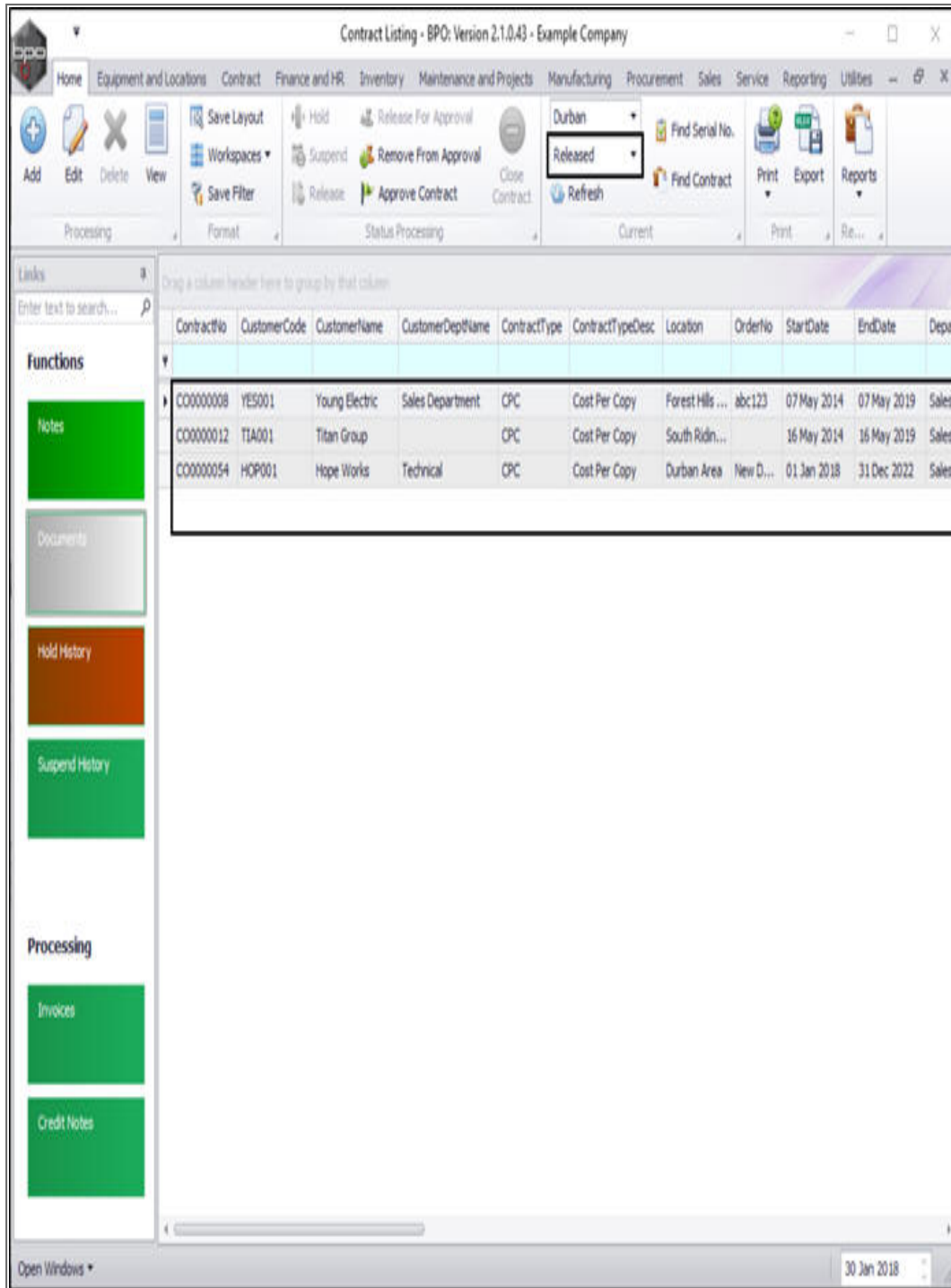
Contract - Process

The contract, no. CO0000050 has been processed as approved.

OK

Open Windows | 30 Jan 2018

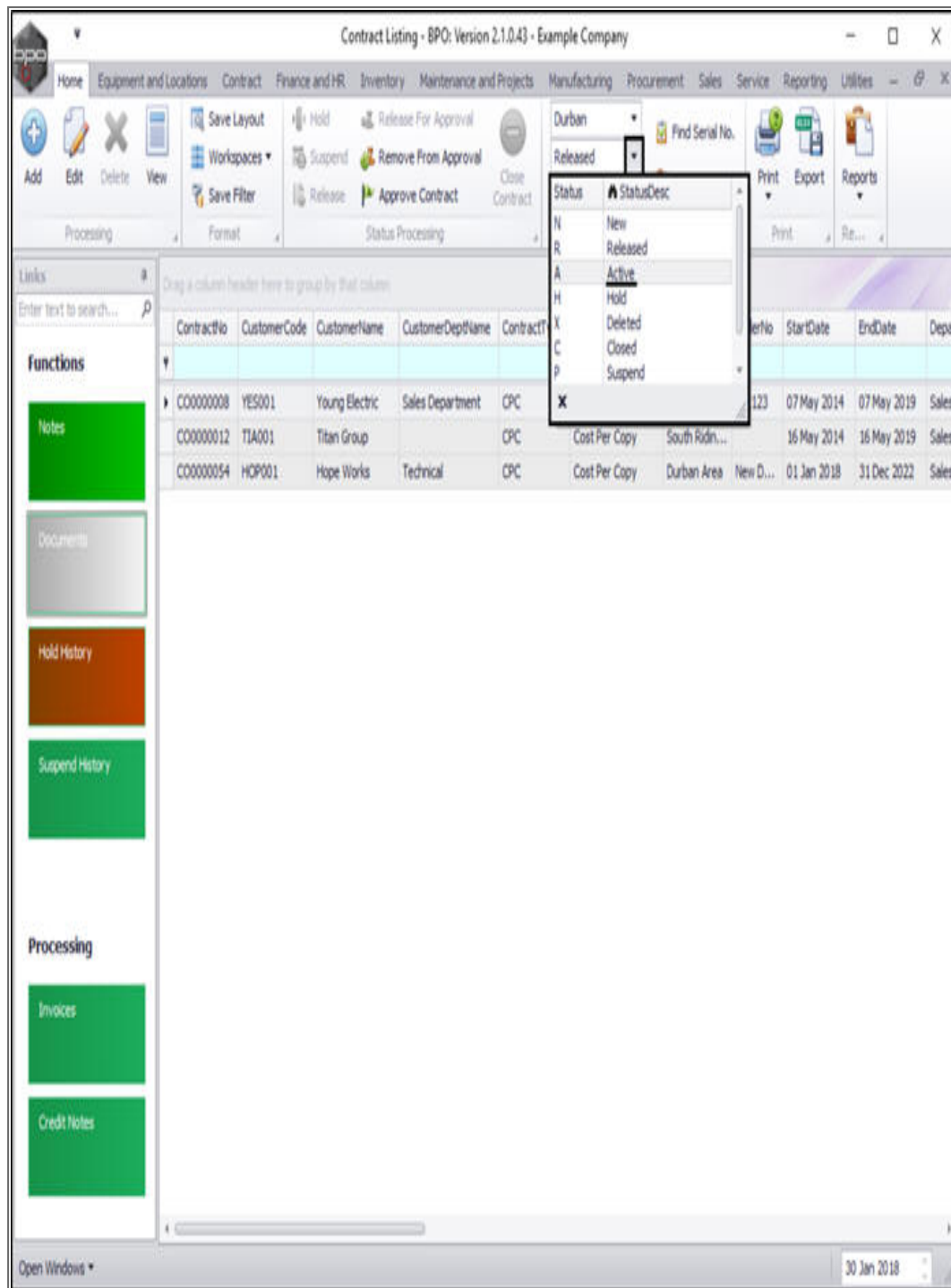
- The contract will be removed from the **Contract Listing** screen where the **status** is set to **Released**.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Depart
CO0000008	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Forest Hills ...	abc123	07 May 2014	07 May 2019	Sales
CO0000012	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO0000054	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	New D...	01 Jan 2018	31 Dec 2022	Sales

VIEW APPROVED CONTRACT IN ACTIVE STATUS

- Select the **Active** status.



- The contract can now be found in the **Contract Listing** screen where the **status** is set to **Active**.

Contract Listing - 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 Layout Hold Release For Approval Find Serial No. Find Contract Print Export Reports

Workspaces Suspend Remove From Approval Close Contract Refresh

Save Filter Release Approve Contract

Processing Format Status Processing Current Print Re...

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	Depart
CO0000006	OFF001	Office Supplies ...		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supplies ...		CPC	Cost Per Copy	Forest Hills ...		07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dyn...		CPC	Cost Per Copy	Main	Contra...	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	Sales
CO0000019	OFF001	Office Supplies ...		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	Techn
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	Techn
CO0000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	Sales
CO0000044	BOT0001	Botthas Networ...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Techn

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Open Windows

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