

# CONTRACT

## **ADD ITEM INCLUSIONS**

Item Inclusions are items which are included on a contract and should not be billed separately. These items are selected first by category and then by the item within that category.

Examples of Item Inclusion Category Types are:

- Part Inclusion e.g., toner
- BOM Inclusione.g., machine service BOM
- Craft Inclusion e.g., technician
- Service Inclusion e.g., call out fee

*More than one* item inclusion can be added from *each* category type.

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 *Act-ive* contracts for the selected site.

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## **SELECT THE CONTRACT**

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

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• Click on the *Edit* button.



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The *Contract Maintenance* screen will be displayed.

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## **SELECT THE ITEM**

• Click on the row of the contract item you wish to work with.





### Item Inclusions Frame

• Click on the *Item Inclusions* tab.

The *Item Inclusions* frame will be expanded.

- In the *Item Inclusions* frame, you can add all *Contract Inclusions* (items which are included in the contract and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically "included" in the contract and are covered by a set contract fee agreed between the customer and service provider.
- Although they are included, you can have a breakdown of each individual inclusion. This breakdown is achieved by utilising the Link Fee panel within the Item Inclusion panel. For more information, refer to the Link Fee topic.



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- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- A *Process* menu will pop up with the following options:
  - Part:<u>Add Part Inclusion</u>
  - BOM: Add Bill Of Materials Inclusion
  - Craft:<u>Add Craft Inclusion</u>
  - Service: Add Service Inclusion
  - Link Fee:Link A Fee To An Inclusion
  - Delete: Delete Inclusion



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#### **Add Part Inclusion**

• Click on *Part* - Add Part Inclusion.

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- An Input Validation message box will pop up asking:
  - Are you sure you want to add a part inclusion to this item [Serial Number or Location Description]?
- 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.



- *Code:* This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- *SLA Type:* This field will auto populate with the SLA type of the selected item.
- *Quantity:* Type in the quantity included for the selected part.
- *Fee Type:* This field will only be populated if you link a fee to the inclusion.



### Add Bill of Materials Inclusion

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- The *Process* menu will pop up.
- Click on **BOM** Add BOM Inclusion.



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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 - [Serial Number or Location Description]??
- 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.
- *Code:* This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- *SLA Type:* This field will auto populate with the SLA type of the selected item.
- *Quantity:* Type in the quantity included for the selected BOM.
- *Fee Type:* This field will only be populated if you link a fee to the inclusion.



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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.

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- An *Input Validation* message box will pop up asking:
  - Are you sure you want to add a Craft inclusion to this item [Serial Number or Location Description]?
- 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.
  - *Code:* This field will auto populate with the code of the selected item.
  - **Description:** This field will auto populate with the description of the selected item.
  - *SLA Type:* This field will auto populate with the SLA type of the selected item.
  - *Quantity:* Type in the number of hours included for the selected Craft.
  - *Fee Type:* This field will only be populated if you link a fee to the inclusion.



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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.

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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 [Serial Number or Location Description]?
- 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.
  - *Code:* This field will auto populate with the code of the selected item.
  - **Description:** This field will auto populate with the description of the selected item.
  - *SLA Type:* This field will auto populate with the SLA type of the selected item.
  - *Quantity:* Type in the quantity included for the selected Service.
  - *Fee Type:* This field will only be populated if you link a fee to the inclusion.



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Note: You can add more than one of each type of item inclusion to the contract.

#### Link a Fee to an Inclusion

- Right click in the row of the item inclusion that you wish to link a fee to.
  - In this image *IT Technician* has been selected.
- The *Process* menu will pop up.
- Click on *Link Fee* Link Fee to this Inclusion.



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- A *The Fee Lookup List* screen will pop up.
- Click on the *row selector* in front of the *fee* you wish to *add* to this *inclusion*.
- Click on *Ok*.
- Note: Only the fees that you selected in the Item Fees Frame will be displayed in this screen, and the fee can only be linked to one inclusion.





- The *The Fee Type* field will be populated with the selected fee type.
  - In this image, *S* Service was selected, since the selected inclusion is covered by the Service Fee, in this example.

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### View the linked Inclusion on the Fee Detail

*Note:* that for this step you will need to save the contract first and then come back to view the Fee's linked Inclusion.

- Click on the *Item Fees* frame.
- Click on the *Expand* button on the fee you linked to an inclusion.
- The *Fee Inclusions* frame will be displayed.
- You can now view the details of the inclusion.
- You can change the *Quantity* of the inclusion in this frame if required.



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#### **Delete Inclusion**

- Another 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 *INST* Installation Fee 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 -[Serial Number or Location Description]?
- Click on Yes.

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



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			End Da	te 13/06/2019 ·				TECH		Technician		CRET	2				
			Peri	ad 60 🗘 *													
	Hold Hist	tory	Period Ty	pe Months		••				<u> </u>							
			Departme	nt Sales Department													
			Contract Manag	er Carolina Suzzetta Lou	rens van de	••											
	Suspend		Salesm	an Belinda Sharman		••											
			Aggregate Billin	a 🗆													
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	Credit No																
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			Contract Info	customer Into Billing I	nto Rental I	onno	•										+
Op	en Windows 🔻													User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

## **SAVE ITEM INCLUSIONS**

## **SAVE THE CONTRACT**

• When you are done, click on *Save*.

<b>\$</b> -			Ma	aintenance for C	ontract No. : CO000001	5 - Status : A -	BPO: Version	2.5.1.4 - Example Con	npany		_	8 X
Home Equipment /	/Locations Contra	act Finance / HR I	nventory Mainte	enance / Projects	Manufacturing Pro	curement Si	ales Servici	e Reporting Utili	ties		-	8 ×
Save back Save Layout	workspaces											
Process 4 Forma	t											~
B Links #	Customer Info		#	Drag a column h								Use
Enter text to search P				PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAH¢
Functions	Customer	Titan Group	•	<ul> <li>(0)</li> </ul>	(D):	(0)	<ul> <li>International</li> </ul>	4 <b>0</b> 4	4 <b>0</b> 4	1 <b>0</b> :	<ul> <li>Image: Control of the second se</li></ul>	- ned
Life	Address	658 Dime Road South Riding	P ^ *	▶ 🗄 SP19-12	SP19-12 Colour Copier	SP19-12185			Reception	658 Dime Road, South Riding, ,	2101	
m Notes				•								
d Bi		1478										
2 Degements	Order No											
Cocomenta	Required											
	Location	Main										
Hold History												
Suspend History												
Processing												
Invoices												
Credit Notes												
	Contract Info C	Customer Info Billing Inf	o Rental Info									+
Open Windows 🕶										User : Bianca 03/02/2023 Version : 2.	5.1.4 Example	Company

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.

<b>\$</b> •				Contract Listin	g - BPO: Ve	rsion 2.5.1.4 - Example Comp	any							- 8	x
Home Equips	ment / Locations C	ontract Fina	nce / HR Inventory Maintenance / Proj	ects Manufacturing	Procure	ment Sales Service	Reporting	Utilities						- 8	x
Add Edit Delete V	iew Save Laya	out Hek Hok xes ▼ 😴 Sus r I 🔓 Rek	Release For Approval     Appro     Approve From Approval     Approve Contract     O Declin	e Closure Close Close Contract	Durban Active Status	Find Serial No.	Print	Export Report	s						
Processing	" Format		Status Processing		A R	Released	Prir	nt 🦼 Repo							
Links #	Drag a column head				A	Active Hold									
enter text to search P	ContractNo	CustomerC	CustomerName	CustomerD	Co P	Suspend	rderNo	StartDate	EndDate	Department	Period	PeriodType	BilingCycle	BillingPeriod	Billi
Functions	Y 10:	(D)	1 <b>0</b> :	10:	• <b>0</b> <sup>C</sup>	Closed	, D:	-	-	·0:	-	×0:	(0)	-	-
	+ CO0000016	TIA001	Titan Group		CP X		4	13/06/2014	13/06/2019	Sales Depar		60 Months	Months	4	4
Notes	CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co Durban Area	~	09/07/2014	09/07/2019	Sales Depar		60 Months	Months	ş	5
	CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co Main		28/07/2014	28/07/2019	Sales Depar		60 Months	Bi-annual	6	ذ
	CO000031	YES001	Young Electric		CPC	Cost Per Co Hilcrest		24/03/2016	24/03/2021	Sales Depar		60 Months	Months	2	1
Documents	CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co Main		05/07/2016	05/07/2021	Sales Depar		60 Months	Months	5	5
	CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co Main		01/08/2016	07/09/2021	Sales Depar		60 Months	Quarterly	ş	5
	CO0000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co Durban Area	1234	07/03/2018	07/03/2023	Sales Depar		60 Months	Months	7	2
Hold History	CO0000074	DER001	Derton / Technologies		CPC	Cost Per Co Durban Area	1234	15/06/2018	15/06/2023	Sales Depar		60 Months	Months	6	5
	CO0000077	PIN0001	Pink Shoes		CPC	Cost Per Co Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	4	\$
	CO000078	PIN0001	Pink Shoes		CPC	Cost Per Co Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	4	\$
Concerned Markenson	CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co Durban Cen	1234	06/05/2017	06/05/2020			60 Months	Months	2	2
suspend history	CO0000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	4	\$
Processing Invaces Credit Notes															
Open Windows 🕶										Use	r : Blanca	03/02/2023 Ve	rsion : 2.5.1.4	Example Com	pan

- 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.





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