CONTRACT

EDIT ITEM FEES

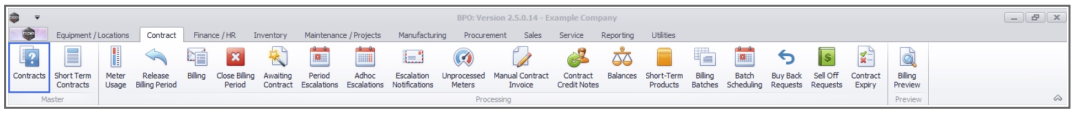
A contract **item fee** can be edited when the contract is in the **Active** state.

Certain amendments made to the contract **item fees**, will trigger the contract to be moved back to the Released state, in order for the contract to be checked and re-Approved. An email will then be sent to all users who have the rights to authorise this contract.

These are the changes involved that will trigger the re-Approval process:

- If any contract **Item Fee** is added or removed
- If the **Billing Customer** on an **Item Fee** or Item Meter is changed.
- If any of the following details are changed on contract **Item Fees**:
    - Amount
    - Start Date
    - End Date
    - Escalation %
    - Account Code
    - COS Account Code
    - Invoice Description
    - Billing Period
    - Billing Cycle
    - Finance Party
    - Finance Amount

Ribbon Select ***Contract > Contracts***



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

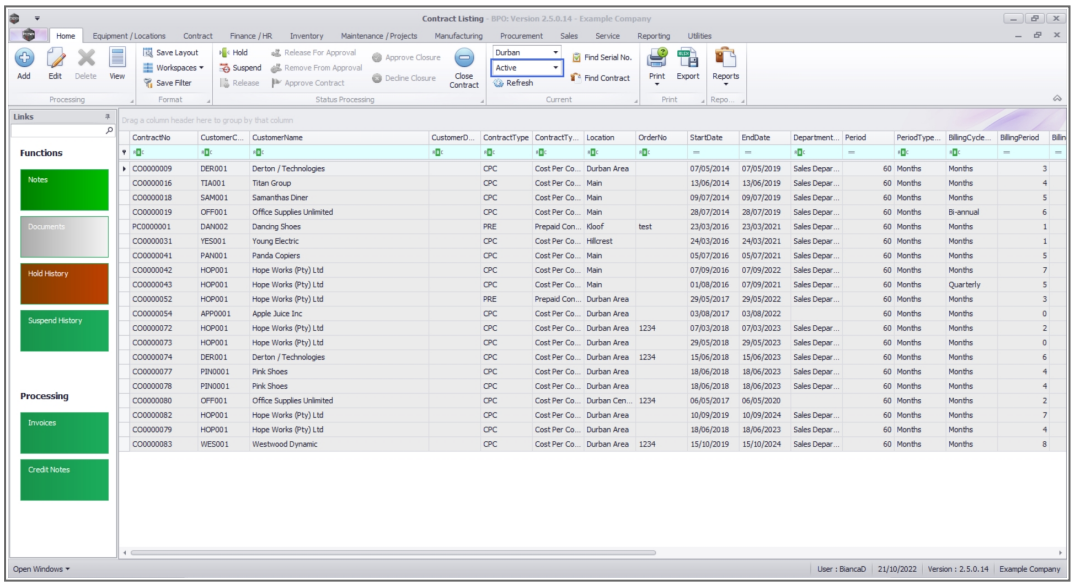
Select the Site

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.



SELECT THE CONTRACT

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

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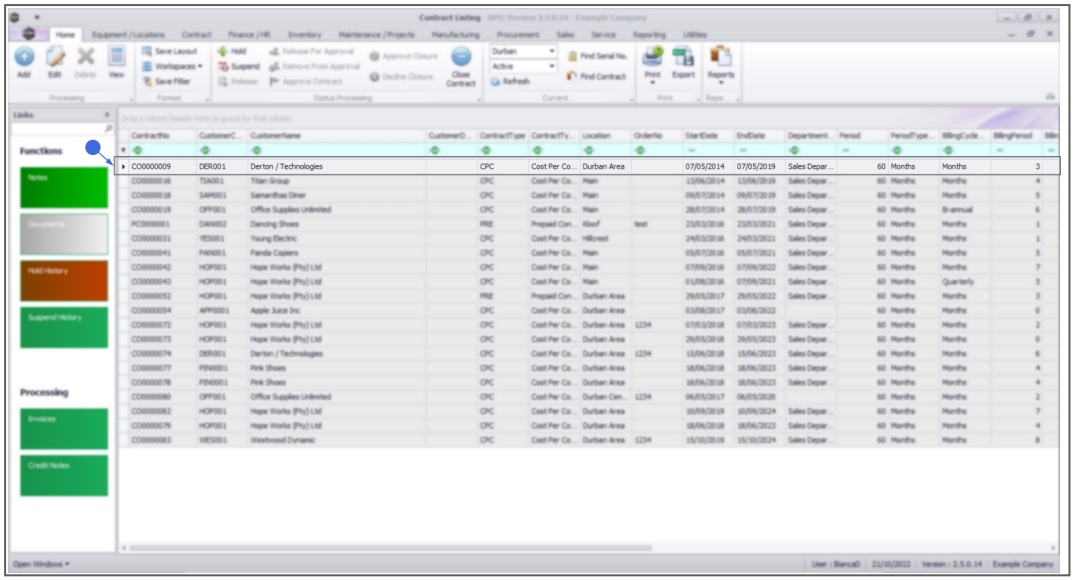
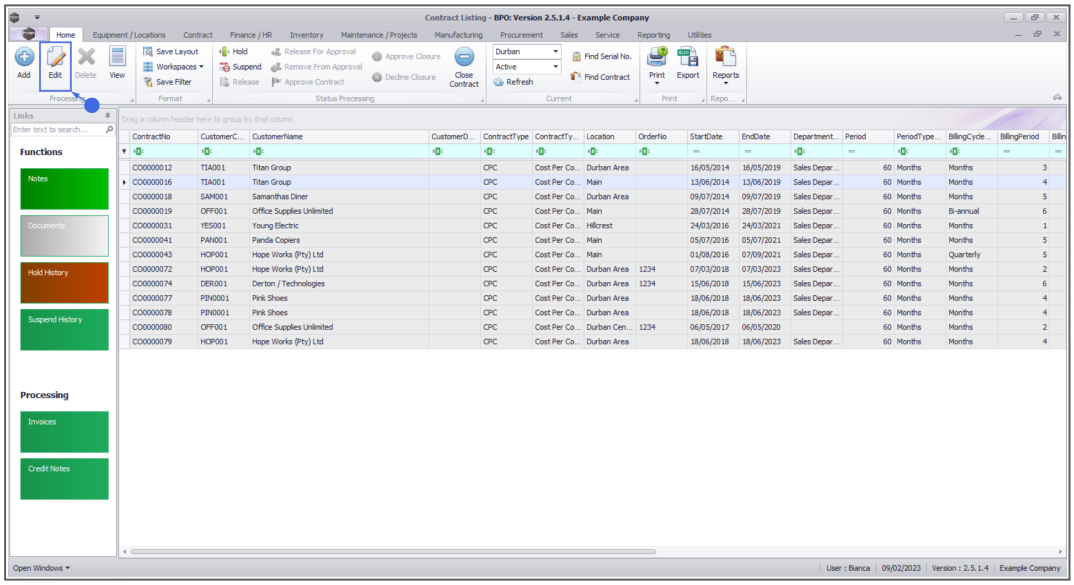


- Click on the ***Edit*** button.



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

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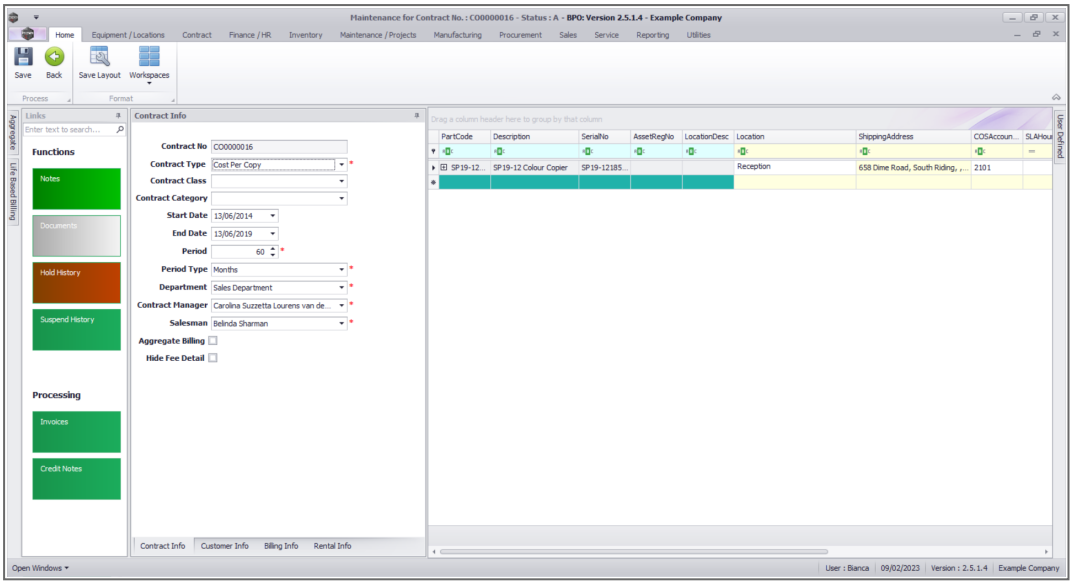

SELECT THE ITEM

- Click on the ***expand*** button in the ***row*** of the ***item*** where you wish to edit the ***item fee***.

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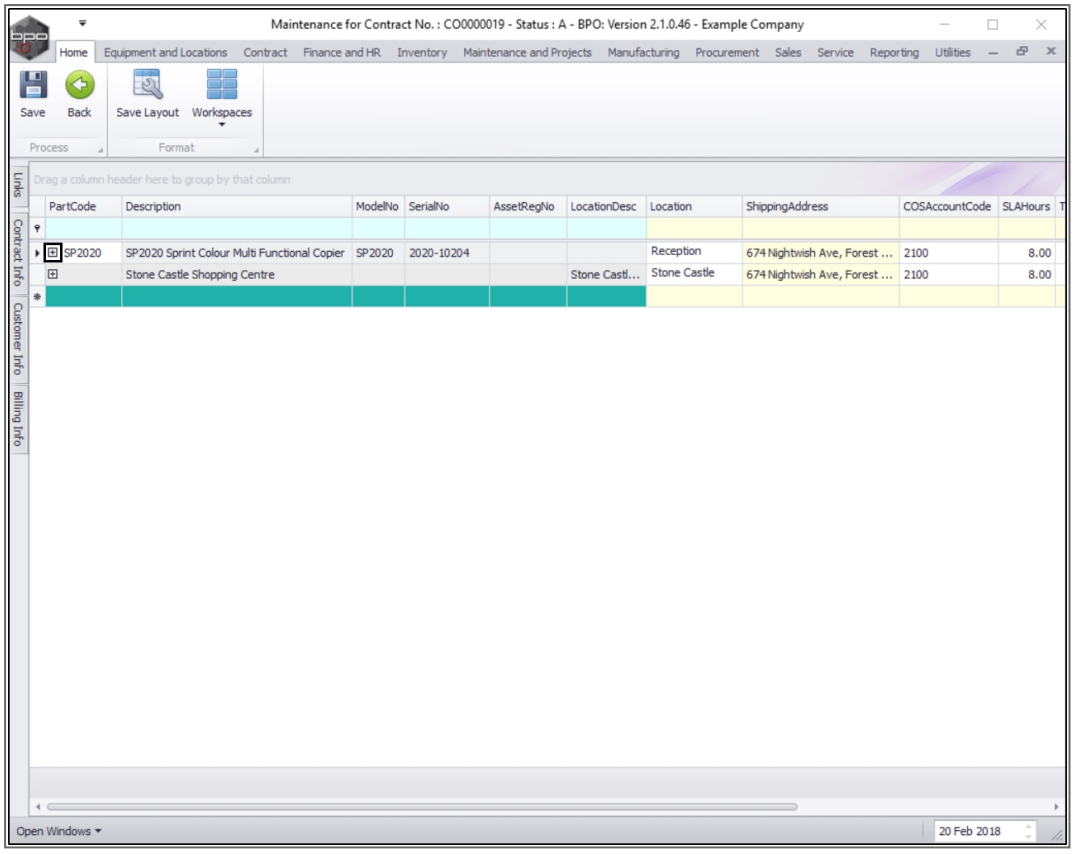

- The ***Items*** data grid will be expanded.
- The ***Item Fees*** frame usually opens first by default, if not, click on the ***Item Fees*** tab.

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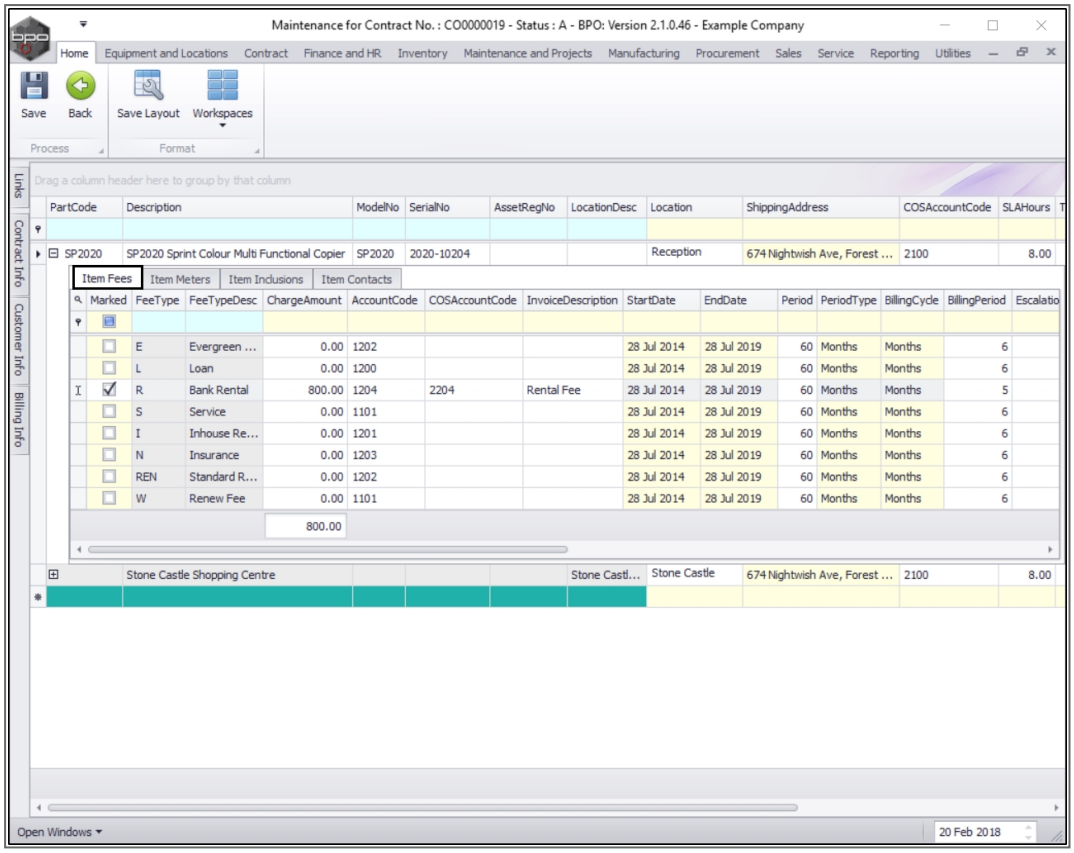

SELECT THE ITEM FEE

- Select the ***field*** in the ***row*** of the specific ***Item Fee*** that you wish to change.
    - In this example, ***Charge Amount*** in the row of the ***Bank Rental Fee*** has been selected.

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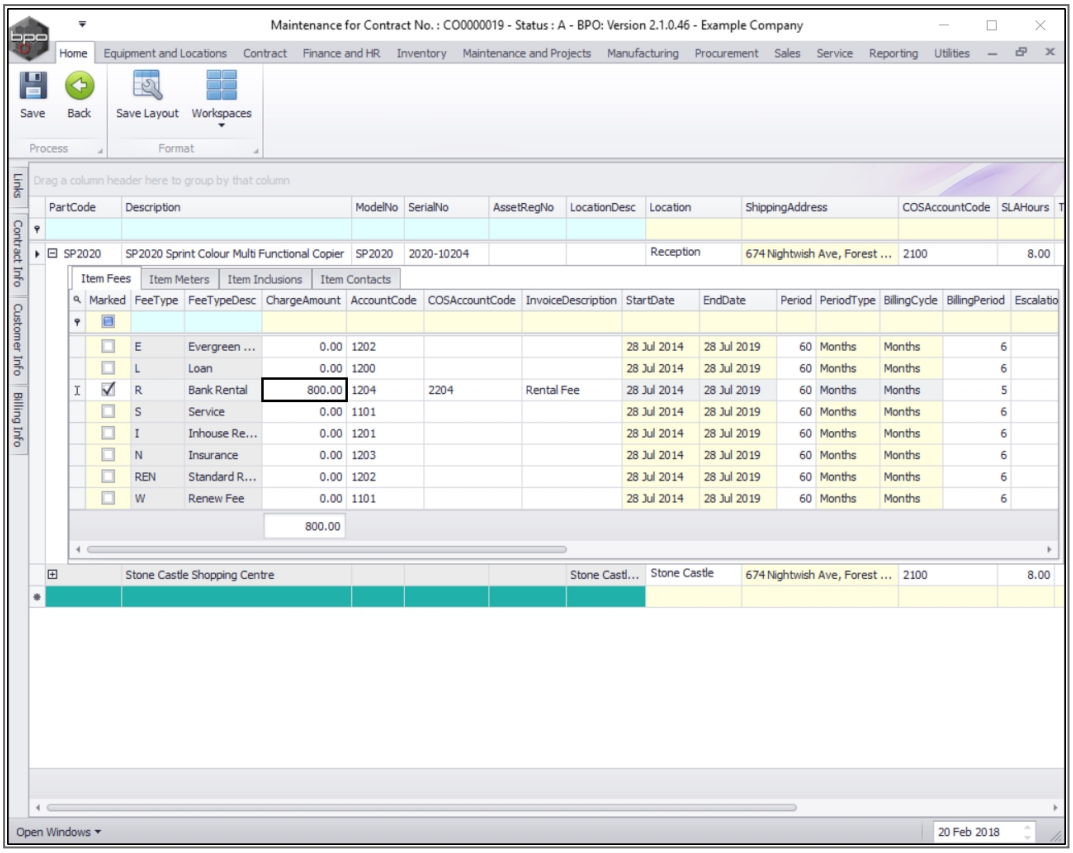

EDIT ITEM FEE

- ***Type in*** or use the ***arrow indicators*** to make the changes as required.
    - In this example, the Item Fee has been ***increased*** to **R950**.

SAVE ITEM FEE CHANGES

SAVE THE CONTRACT

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

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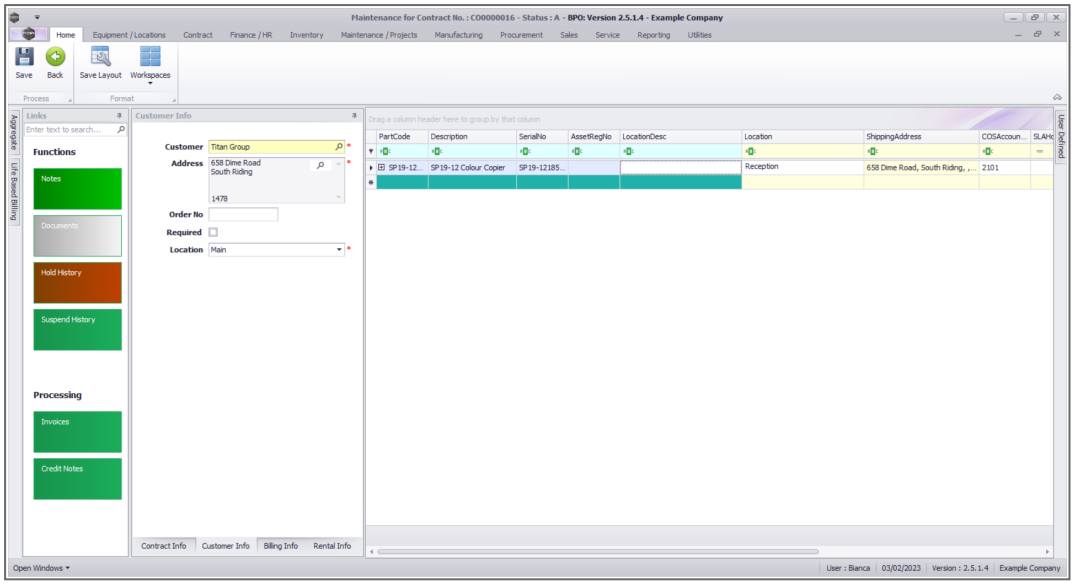
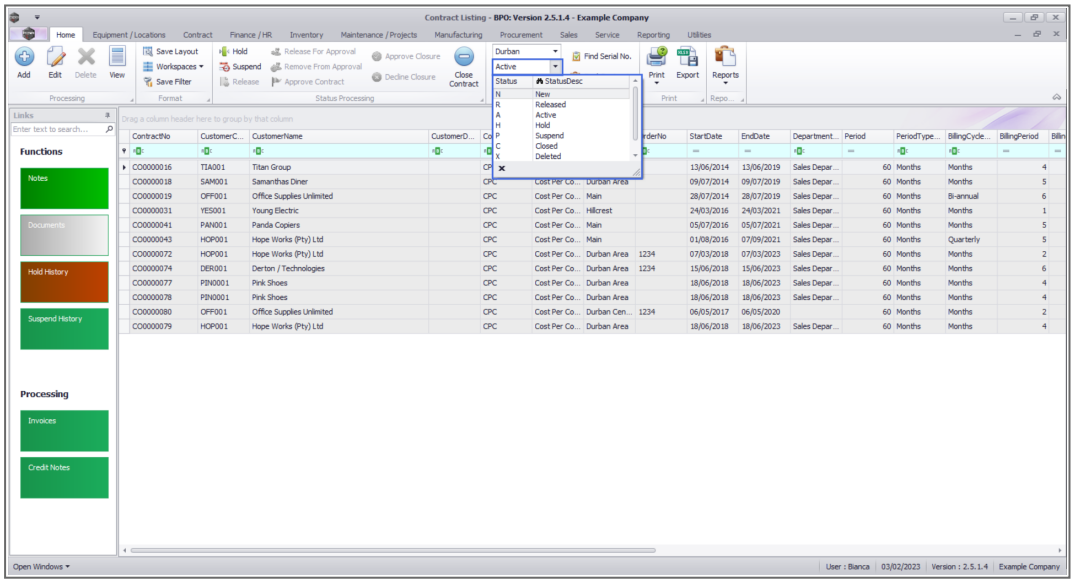


- The contract will be ***saved*** and you will return to the ***Contract Listing*** screen where the status defaults to ***Active***, or will be set to the Status you last selected.
- Click on the ***drop-down arrow*** in the ***Status*** field and select the relevant status.



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

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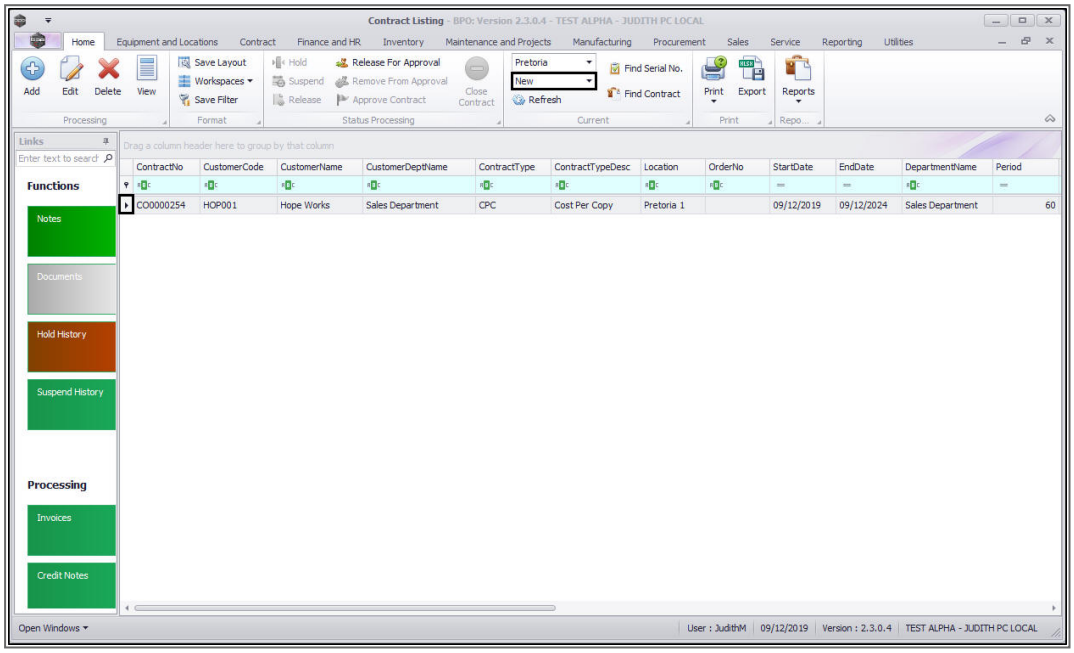
- From here, the contract will need to be Released and then Approved before it becomes active.
- **Edited** contracts may either remain in ***Active*** status or move to ***Released*** status in order for changes to be reviewed before Approval depending on the change made.



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