

CONTRACT

EDIT ITEM FEES

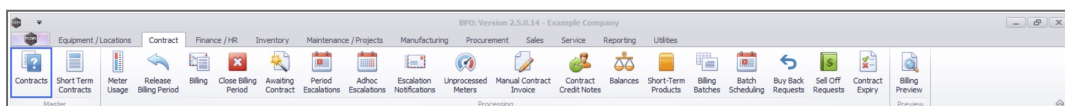
A contract **item fee** can be edited when the contract is in the **Active** state.

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**



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

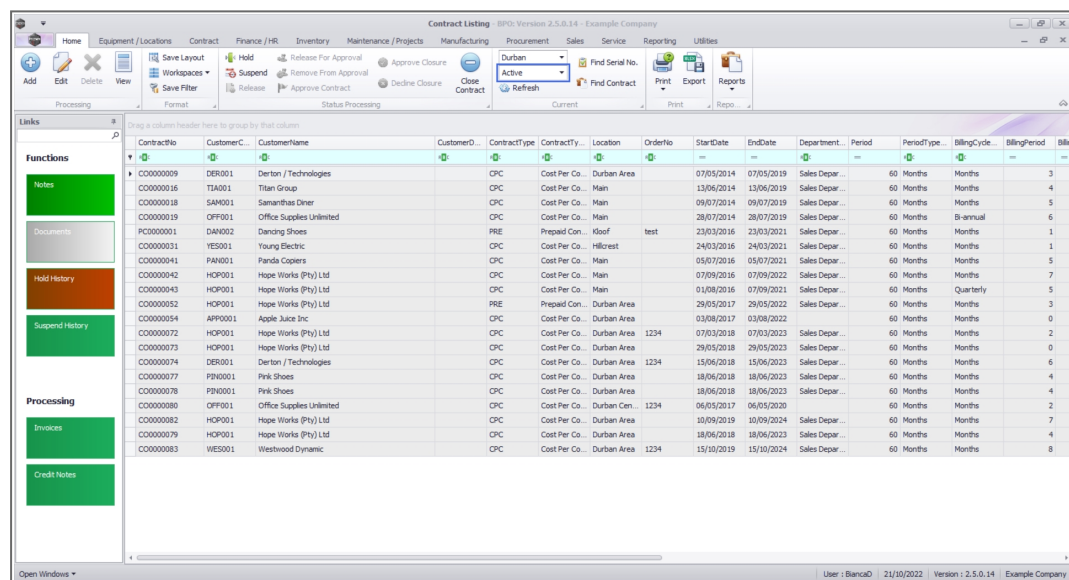
Select the Site

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.



| ContractNo | CustomerC | CustomerName | CustomerD | ContractType | ContractTy | Location | OrderNo | StarDate | EndDate | Department | Period | PeriodType | BillingCycle | BillingPeriod | Bills |
|------------|-----------|---------------------------|-----------|--------------|--------------|---------------|---------|------------|------------|----------------|--------|------------|--------------|---------------|-------|
| CO0000009 | DER001 | Dierlan / Technologies | | CPC | Cost Per Co. | Durban Area | | 07/05/2014 | 07/05/2019 | Sales Depar... | 60 | Months | Months | | 3 |
| CO0000016 | TIA001 | Titan Group | | CPC | Cost Per Co. | Main | | 13/06/2014 | 13/06/2019 | Sales Depar... | 60 | Months | Months | | 4 |
| CO0000018 | SAN001 | Samanthas Diner | | CPC | Cost Per Co. | Main | | 09/07/2014 | 09/07/2019 | Sales Depar... | 60 | Months | Months | | 5 |
| CO0000019 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co. | Main | | 28/07/2014 | 28/07/2019 | Sales Depar... | 60 | Months | Bi-annual | | 6 |
| PC0000001 | DAN002 | Dancing Shoes | | PRE | Prepaid Con. | Kloof | test | 23/03/2016 | 23/03/2021 | Sales Depar... | 60 | Months | Months | | 1 |
| CO0000031 | YES001 | Young Electric | | CPC | Cost Per Co. | Hlorest | | 24/03/2016 | 24/03/2021 | Sales Depar... | 60 | Months | Months | | 1 |
| CO0000041 | PAN001 | Panda Copiers | | CPC | Cost Per Co. | Main | | 05/07/2016 | 05/07/2021 | Sales Depar... | 60 | Months | Months | | 5 |
| CO0000042 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Main | | 07/09/2016 | 07/09/2022 | Sales Depar... | 60 | Months | Months | | 7 |
| CO0000043 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Main | | 01/08/2016 | 07/09/2021 | Sales Depar... | 60 | Months | Quarterly | | 5 |
| CO0000052 | HOP001 | Hope Works (Pty) Ltd | | PRE | Prepaid Con. | Durban Area | | 29/05/2017 | 29/05/2022 | Sales Depar... | 60 | Months | Months | | 3 |
| CO0000054 | APP0001 | Apple Juice Inc | | CPC | Cost Per Co. | Durban Area | | 03/08/2017 | 03/08/2022 | Sales Depar... | 60 | Months | Months | | 0 |
| CO0000072 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | 1234 | 07/03/2018 | 07/03/2023 | Sales Depar... | 60 | Months | Months | | 2 |
| CO0000073 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | | 29/05/2018 | 29/05/2023 | Sales Depar... | 60 | Months | Months | | 0 |
| CO0000074 | DER001 | Dierlan / Technologies | | CPC | Cost Per Co. | Durban Area | 1234 | 15/06/2018 | 15/06/2023 | Sales Depar... | 60 | Months | Months | | 6 |
| CO0000077 | PRN001 | Pink Shoes | | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar... | 60 | Months | Months | | 4 |
| CO0000078 | PRN001 | Pink Shoes | | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar... | 60 | Months | Months | | 4 |
| CO0000080 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co. | Durban Cen... | 1234 | 06/05/2017 | 06/05/2020 | Sales Depar... | 60 | Months | Months | | 2 |
| CO0000082 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | | 10/09/2019 | 10/09/2024 | Sales Depar... | 60 | Months | Months | | 7 |
| CO0000079 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar... | 60 | Months | Months | | 4 |
| CO0000083 | WES001 | Westwood Dynamic | | CPC | Cost Per Co. | Durban Area | 1234 | 15/10/2019 | 15/10/2024 | Sales Depar... | 60 | Months | Months | | 8 |

SELECT THE CONTRACT

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

Maintenance for Contract No.: C00000016 - 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: C00000016

Contract Type: Cost Per Copy

Contract Class:

Contract Category:

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: ☐

Drop a column header here to group by that column

| PartCode | Description | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccount | SLA/No |
|----------|-----------------------|------------|------------|--------------|----------|----------------------------------|------------|--------|
| SP19-12 | SP19-12 Colour Copier | SP19-12185 | | Reception | | 658 Dime Road, South Riding, ... | 2101 | |

Contract Info Customer Info Billing Info Rental Info

User: Bianca 09/02/2023 Version: 2.5.1.4 Example Company

SELECT THE ITEM

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

Maintenance for Contract No. : CO0000019 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

| PartCode | Description | ModelNo | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAAccountCode | SLAHours | T |
|----------|--|---------|------------|------------|----------------|--------------|-------------------------------|-----------------|----------|---|
| SP2020 | SP2020 Sprint Colour Multi Functional Copier | SP2020 | 2020-10204 | | | Reception | 674 Nightwish Ave, Forest ... | 2100 | 8.00 | |
| | Stone Castle Shopping Centre | | | | Stone Castl... | Stone Castle | 674 Nightwish Ave, Forest ... | 2100 | 8.00 | |

Links Contract Info Customer Info Billing Info

Open Windows 20 Feb 2018

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

Maintenance for Contract No. : CO0000019 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links

Contract Info

Customer Info

Billing Info

Drag a column header here to group by that column

| PartCode | Description | ModelNo | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccountCode | SLAHours | T | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|-----------------|-------------------------------|--------------|----------------|-------------------------------|--------------------|----------------|----------|------------|------------------------------|----------------|-----------------|-------------------------------|--|--------|---------------|-------------|--------------|-------------|----------------|--------------------|-------------|---------|--------|------------|--------------|---------------|--------------------------|--------------------------|------|---------------|------|------|--|-------------|-------------|-------------|--------|--------|--------|---|-------------------------------------|--------------------------|-------------|--------|------|------|------------|-------------|-------------|-------------|--------|--------|--------|---|--------------------------|-------------------------------------|---------|-------------|--------|------|------|-------------|-------------|-------------|--------|--------|--------|---|--------------------------|--------------------------|---------------|---------|------|------|--|-------------|-------------|-------------|--------|--------|--------|---|--------------------------|--------------------------|-----------|---------------|------|------|--|-------------|-------------|-------------|--------|--------|--------|---|--------------------------|--------------------------|---------------|-----------|------|------|--|-------------|-------------|-------------|--------|--------|--------|---|--------------------------|--------------------------|-----------|---------------|------|------|--|-------------|-------------|-------------|--------|--------|--------|---|--|--------------------------|---|-----------|------|------|--|--|-------------|-------------|----|--------|--------|---|--|--|--|--|--------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|------------------------------|----------------|--------------|-------------------------------|------|------|--|--|--|--|--|--|
| SP 2020 | SP 2020 Sprint Colour Multi Functional Copier | SP 2020 | 2020-10204 | | Reception | 674 Nightwish Ave, Forest ... | 2100 | | 8.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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Inhouse Re... | 0.00 | 1201 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | <input type="checkbox"/> | N | Insurance | 0.00 | 1203 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | <input type="checkbox"/> | REN | Standard R... | 0.00 | 1202 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | <input type="checkbox"/> | W | Renew Fee | 0.00 | 1101 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | 800.00 | | | | | | | | | <table border="1"> <thead> <tr> <th>Stone Castle Shopping Centre</th> <th>Stone Castl...</th> <th>Stone Castle</th> <th>674 Nightwish Ave, Forest ...</th> <th>2100</th> <th>8.00</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | | | | | | | | | | Stone Castle Shopping Centre | Stone Castl... | Stone Castle | 674 Nightwish Ave, Forest ... | 2100 | 8.00 | | | | | | |
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| <input type="checkbox"/> | L | Loan | 0.00 | 1200 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="checkbox"/> | R | Bank Rental | 800.00 | 1204 | 2204 | Rental Fee | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | S | Service | 0.00 | 1101 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | I | Inhouse Re... | 0.00 | 1201 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | N | Insurance | 0.00 | 1203 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | REN | Standard R... | 0.00 | 1202 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | W | Renew Fee | 0.00 | 1101 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | 800.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>Stone Castle Shopping Centre</th> <th>Stone Castl...</th> <th>Stone Castle</th> <th>674 Nightwish Ave, Forest ...</th> <th>2100</th> <th>8.00</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | | | | | | | | | | Stone Castle Shopping Centre | Stone Castl... | Stone Castle | 674 Nightwish Ave, Forest ... | 2100 | 8.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Stone Castle Shopping Centre | Stone Castl... | Stone Castle | 674 Nightwish Ave, Forest ... | 2100 | 8.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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.

Maintenance for Contract No. : CO0000019 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

| PartCode | Description | ModelNo | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccountCode | SLAHours | T |
|----------|---|---------|------------|------------|--------------|----------|-------------------------------|----------------|----------|---|
| SP 2020 | SP 2020 Sprint Colour Multi Functional Copier | SP 2020 | 2020-10204 | | Reception | | 674 Nightwish Ave, Forest ... | 2100 | 8.00 | |

Item Fees Item Meters Item Inclusions Item Contacts

| Marked | FeeType | FeeTypeDesc | ChargeAmount | AccountCode | COSAccountCode | InvoiceDescription | StartDate | EndDate | Period | PeriodType | BillingCycle | BillingPeriod | Escalatio |
|-------------------------------------|---------|---------------|--------------|-------------|----------------|--------------------|-------------|-------------|--------|------------|--------------|---------------|-----------|
| <input type="checkbox"/> | E | Evergreen ... | 0.00 | 1202 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| <input type="checkbox"/> | L | Loan | 0.00 | 1200 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| <input checked="" type="checkbox"/> | R | Bank Rental | 800.00 | 1204 | 2204 | Rental Fee | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 5 | |
| <input type="checkbox"/> | S | Service | 0.00 | 1101 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| <input type="checkbox"/> | I | Inhouse Re... | 0.00 | 1201 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| <input type="checkbox"/> | N | Insurance | 0.00 | 1203 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| <input type="checkbox"/> | REN | Standard R... | 0.00 | 1202 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| <input type="checkbox"/> | W | Renew Fee | 0.00 | 1101 | | | 28 Jul 2014 | 28 Jul 2019 | 60 | Months | Months | 6 | |
| | | | 800.00 | | | | | | | | | | |

Stone Castle Shopping Centre

Stone Castl... Stone Castle

674 Nightwish Ave, Forest ... 2100 8.00

Open Windows 20 Feb 2018

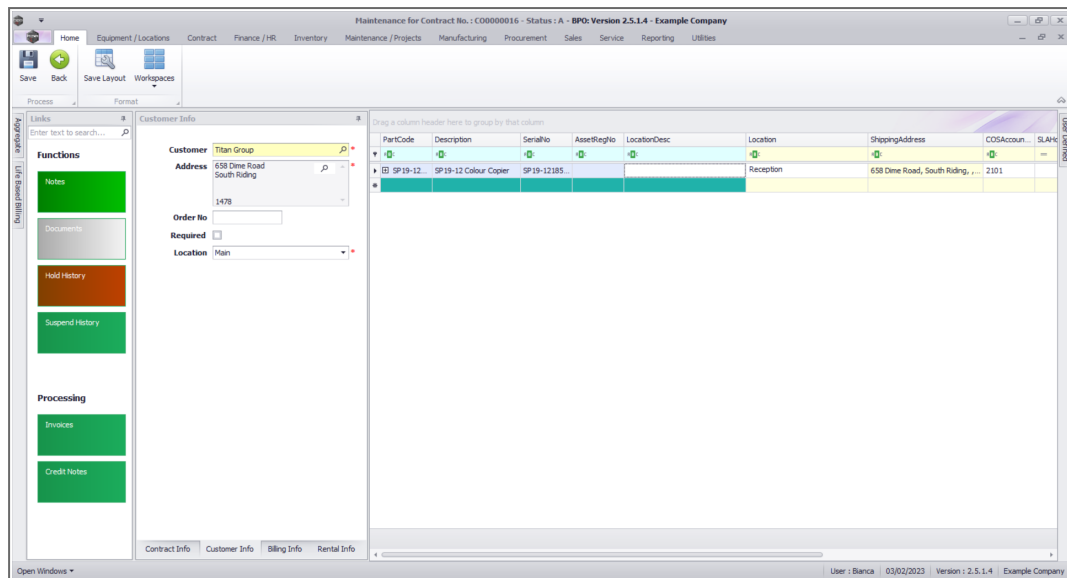
EDIT ITEM FEE

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

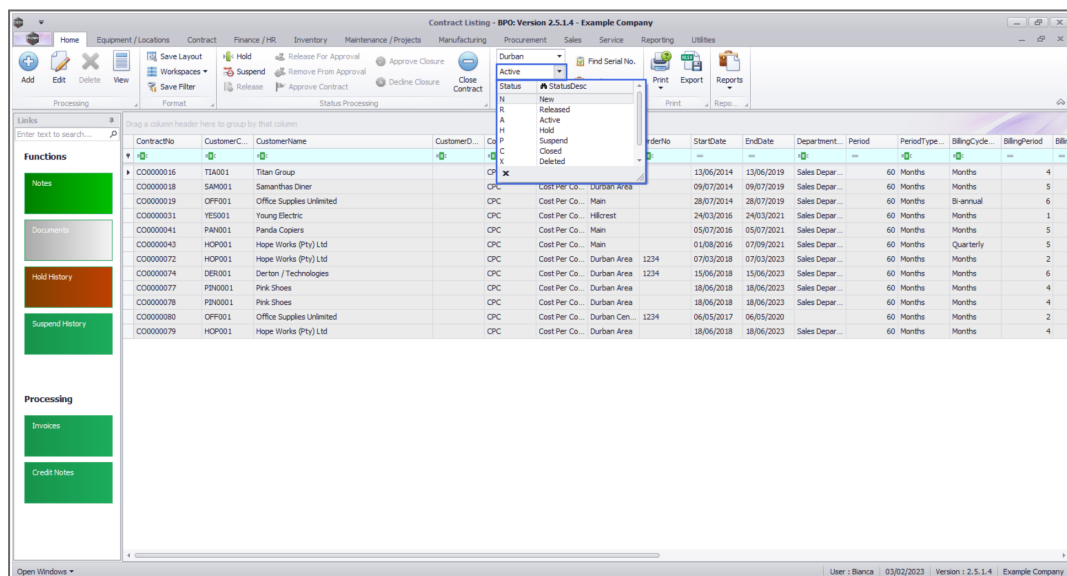
SAVE ITEM FEE CHANGES

SAVE THE CONTRACT

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

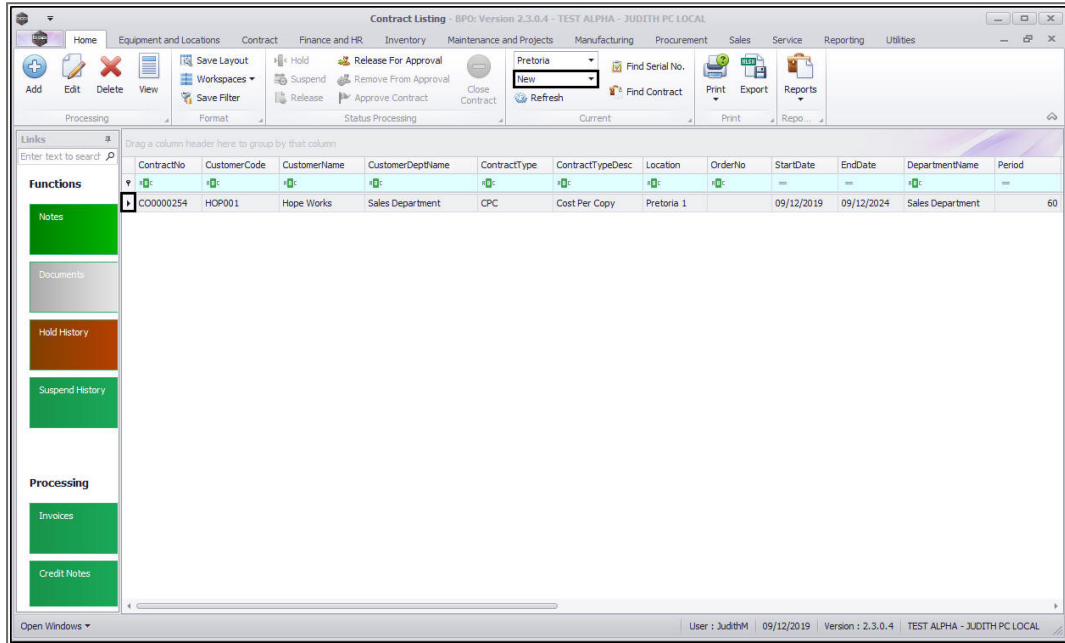


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



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

- 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.



MNU.112.038

