

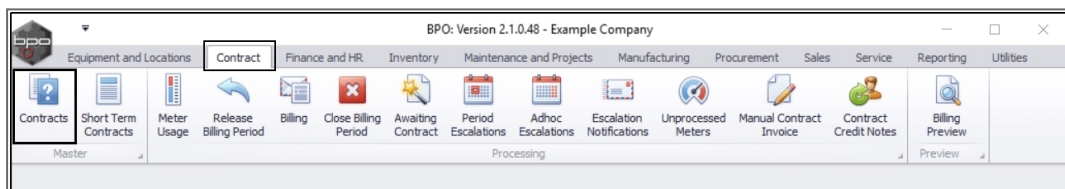
CONTRACT

ADD NEW LOCATION CONTRACT (PRE V2.3.0.0)

A Customer Location is required for a Customer Location Contract.

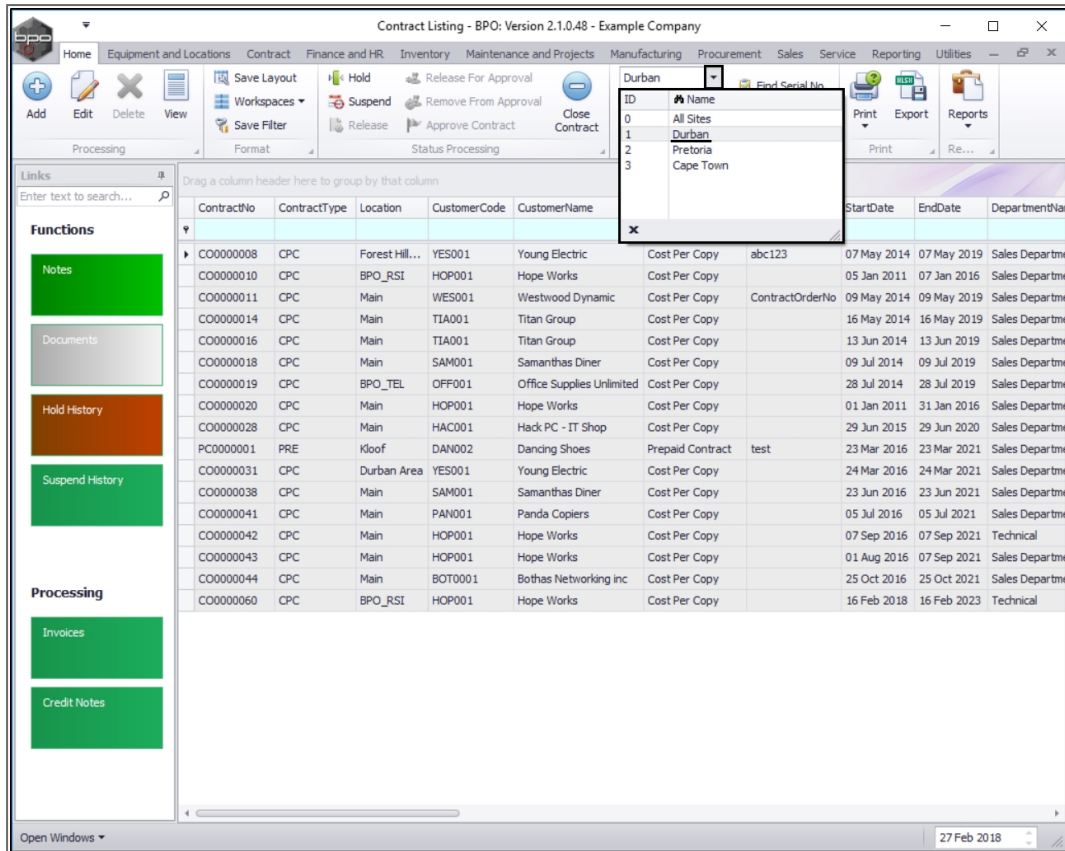
The 'location item' that is being added to the contract is a defined customer location.

Ribbon Access: *Contract > Contracts*



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

- Select the ***site*** that you wish to work in.
 - In this example, ***Durban*** has been selected.



- By default, this screen will list all the **Active** contracts for the selected site.
- You do not need to change this status to create a new location contract.

Contract Listing - BPO: Version 2.1.0.48 - Example Company

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 Hold Suspend Release Remove From Approval Approve Contract Status Processing Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Export Re...

Links

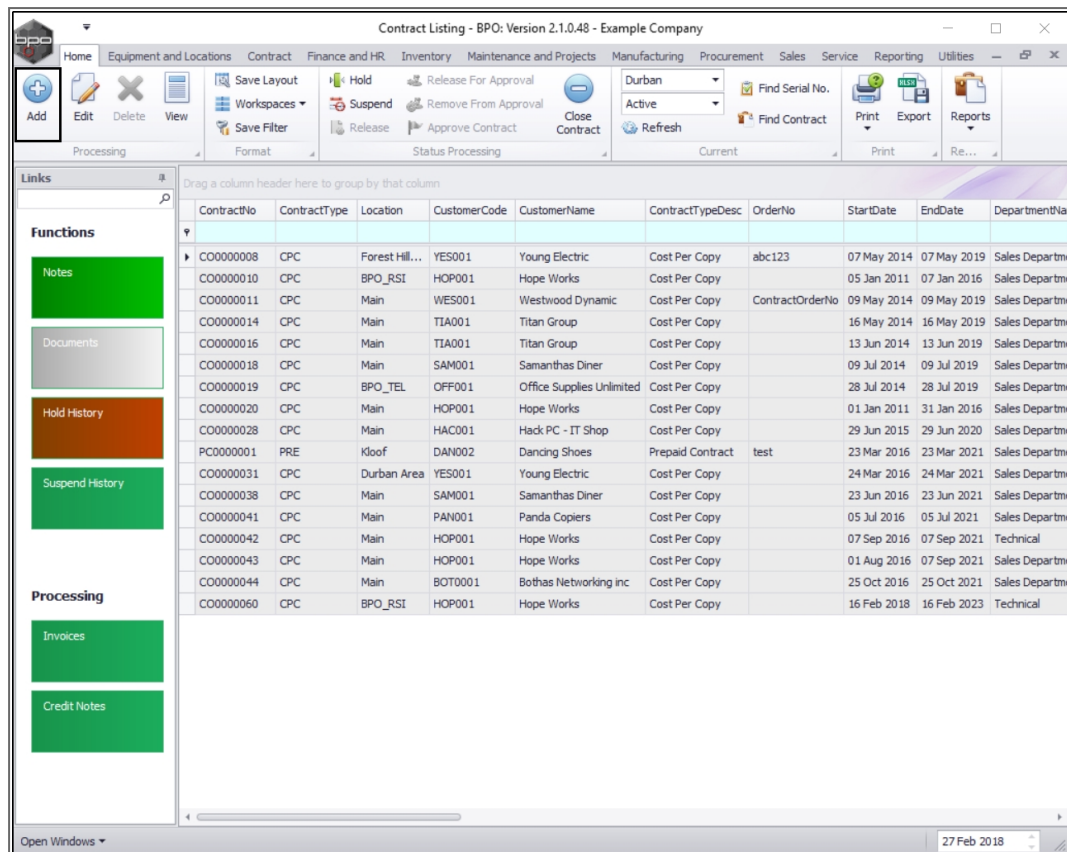
Drag a column header here to group by that column

ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentNa
CO0000008	CPC	Forest Hill...	YES001	Young Electric	Cost Per Copy	abc123	07 May 2014	07 May 2019	Sales Departm
CO0000010	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		05 Jan 2011	07 Jan 2016	Sales Departm
CO0000011	CPC	Main	WES001	Westwood Dynamic	Cost Per Copy	ContractOrderNo	09 May 2014	09 May 2019	Sales Departm
CO0000014	CPC	Main	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Departm
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Departm
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Departm
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Departm
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Departm
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Departm
PC0000001	PRE	Kloof	DAN002	Dancing Shoes	Prepaid Contract	test	23 Mar 2016	23 Mar 2021	Sales Departm
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Departm
CO0000038	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Departm
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Departm
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Departm
CO0000044	CPC	Main	BOT0001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Departm
CO0000060	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		16 Feb 2018	16 Feb 2023	Technical

Open Windows 27 Feb 2018

ADD NEW CONTRACT

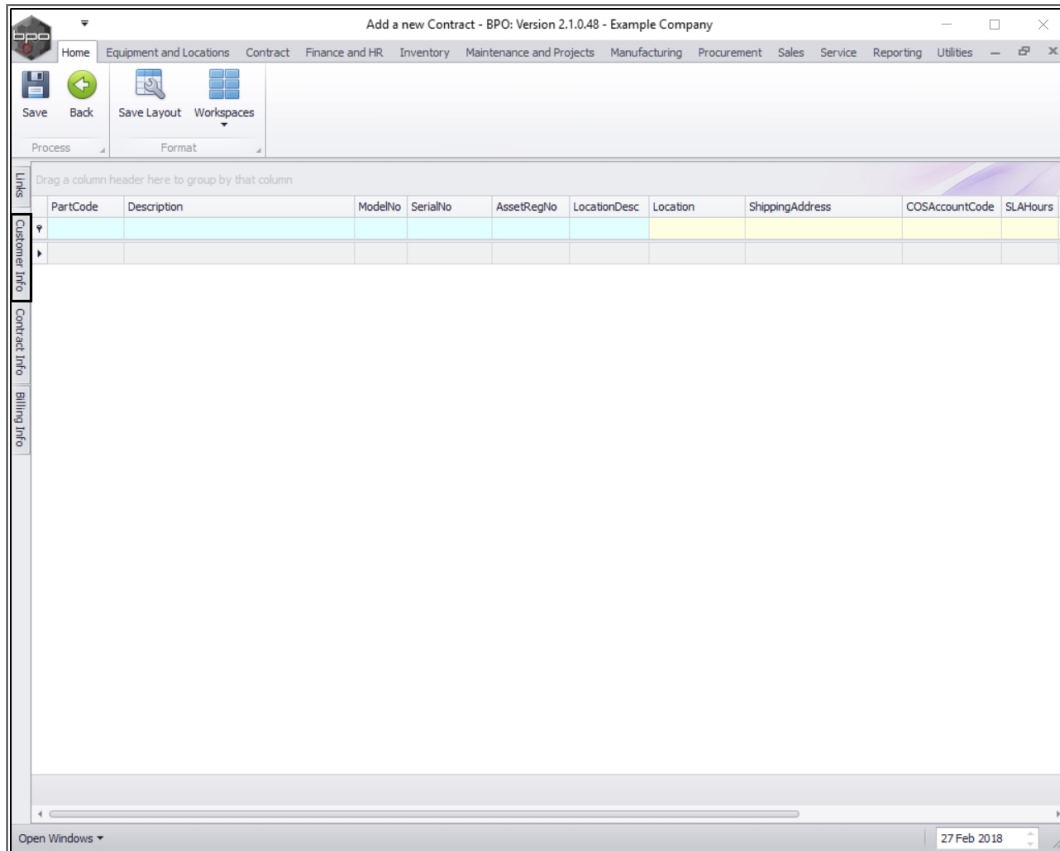
- Click on **Add**.



- The **Add a new Contract** screen will be displayed.
- If the **Information panels** on the left of the screen are not already open and docked, click on the required tab to bring it to the fore and dock the panel.

ADD CUSTOMER INFO

- Click on the **Customer Info** tab.



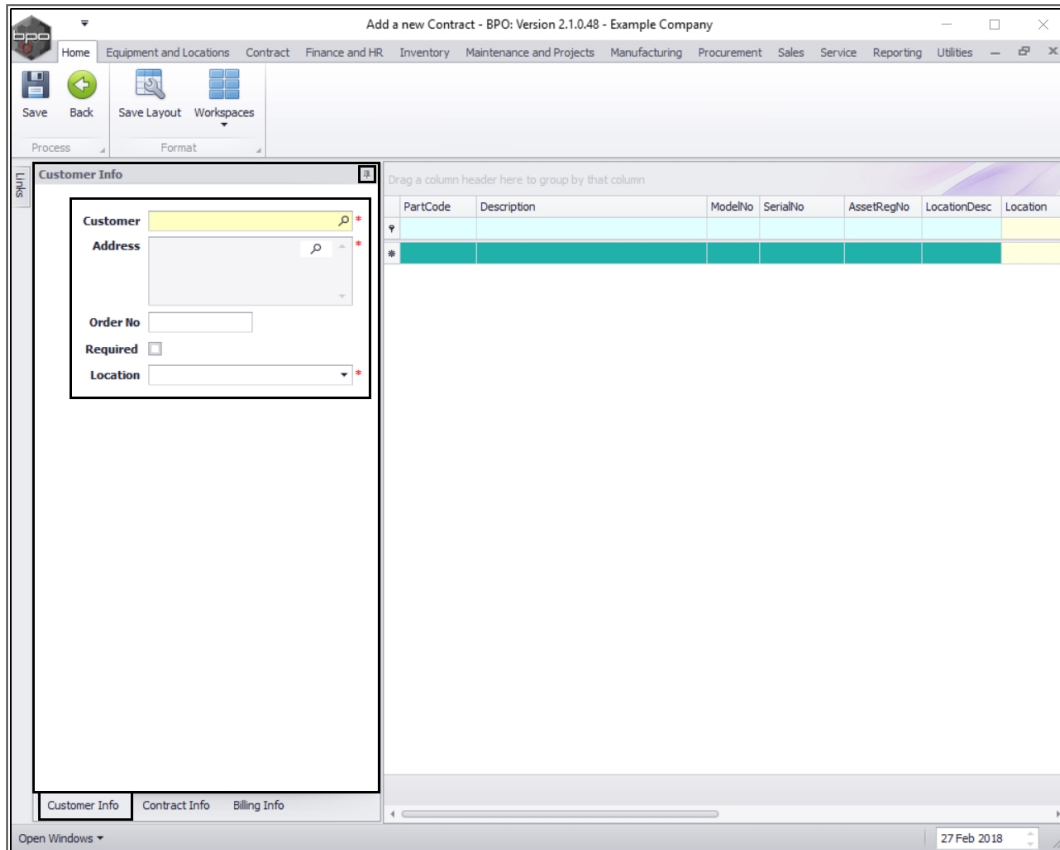
The **Customer Info** panel will be expanded.

- **Note:** *Dock* this panel to make it easier to work in.

Add the Customer information, ensure that all the required fields [*] are filled in.

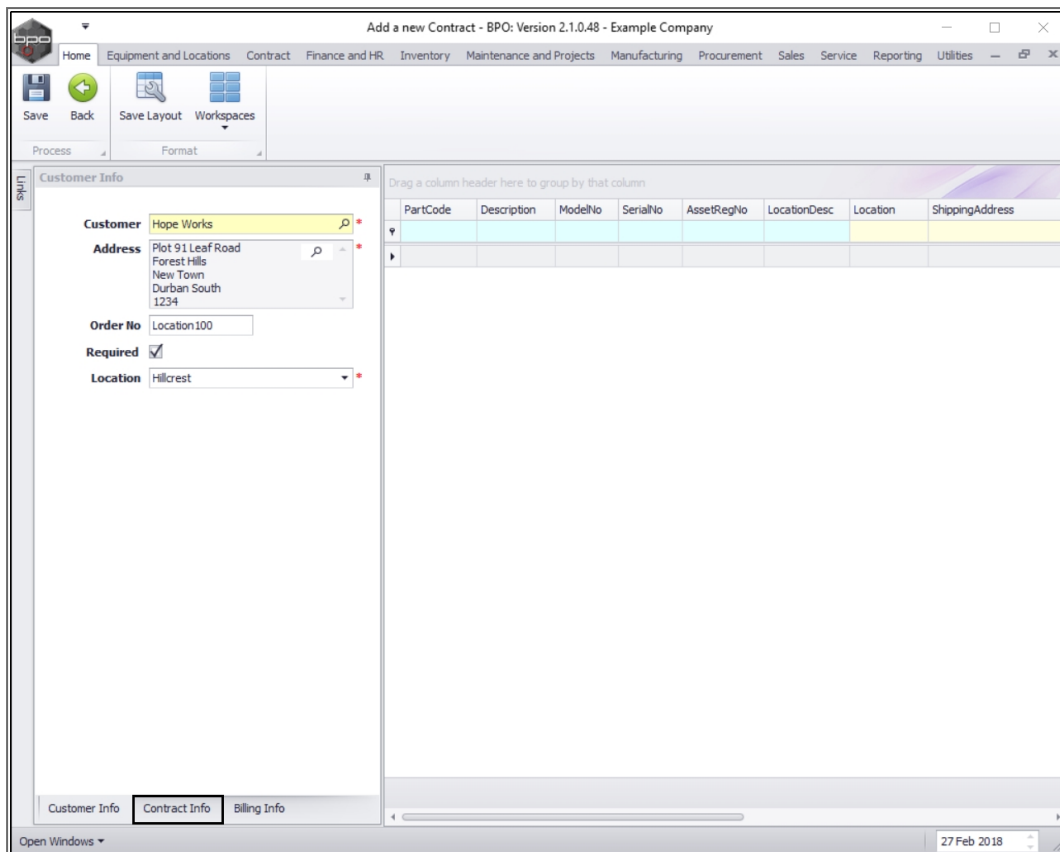
- **Customer:** Click on the search button and select the customer from the **Select a customer for this contract** pop up screen.
- **Address:** Click on the search button and select the address from the **Select an address for this contract** pop up screen.
- **Order No:** Type in the customer order number, if required.
- **Required:** Only select this check box if the client must supply an order number before a technician is sent on site.

- **Location:** Click on the drop-down arrow and select the customer location from the menu.



ADD CONTRACT INFO

- When you have finished editing the customer info details, click on the **Contract Info** tab.



Customer Info

Customer: Hope Works

Address: Plot 91 Leaf Road
Forest Hills
New Town
Durban South
1234

Order No: Location 100

Required: ☒

Location: Hillcrest

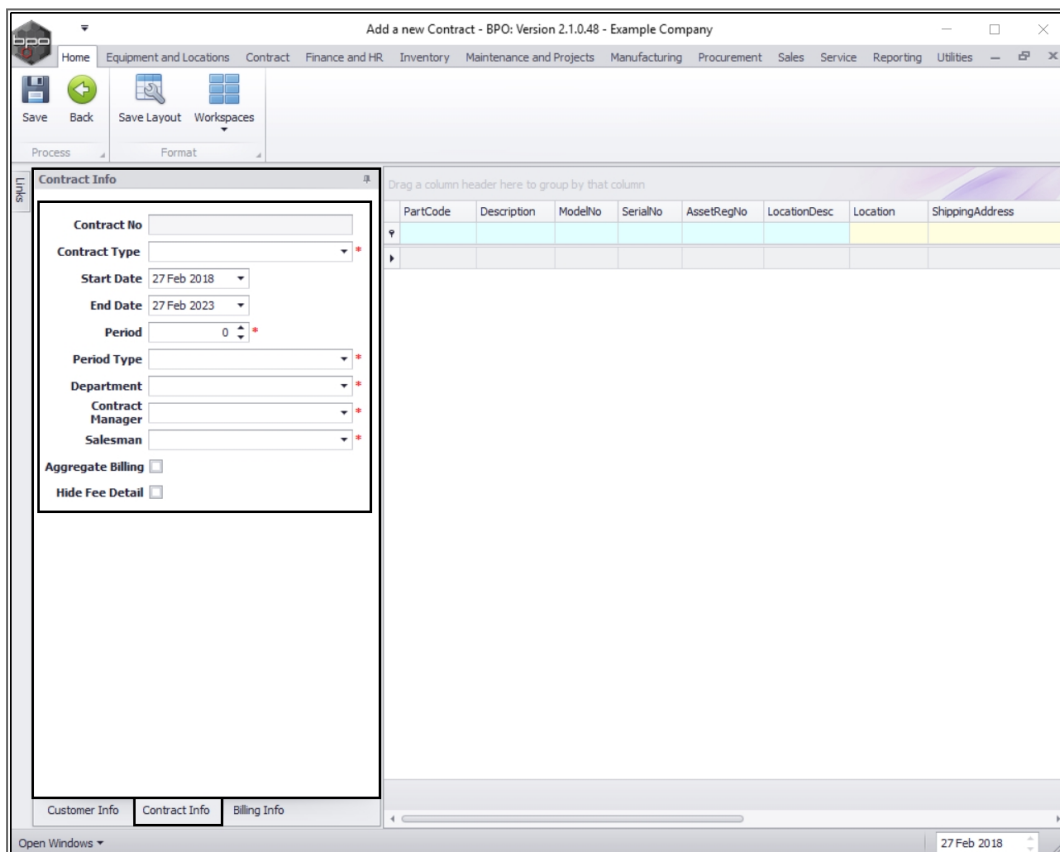
PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress

Contract Info

The **Contract Info panel** will be expanded.

- **Contract No:** The contract number is generated by the system (where configured in the Contract Type setup).
- **Contract Type:** Click on the drop-down arrow and select the contract type e.g., Prepaid Contract.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- **End Date:** This will auto populate 5 years from the start date but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
- **Period:** Either type in or use the arrow indicators to select the period of the contract (life span of the contract).

- **Period Type:** Select the period type (measure relating to the lifespan), e.g., 60 months.
 - **Department:** Click on the drop-down arrow and select the department.
 - **Contract Manager:** Click on the drop-down arrow and select the contract manager.
 - **Salesman:** Click on the drop-down arrow and select the salesman.
 - **Aggregate Billing:** Click on this check box if the customer will receive aggregate billing.
 - **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.
- **Note:** If this is an **Evergreen** contract, set your end date to 31/12/2999.



Contract Info

Contract No

Contract Type

Start Date: 27 Feb 2018

End Date: 27 Feb 2023

Period: 0

Period Type

Department

Contract Manager

Salesman

Aggregate Billing

Hide Fee Detail

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress

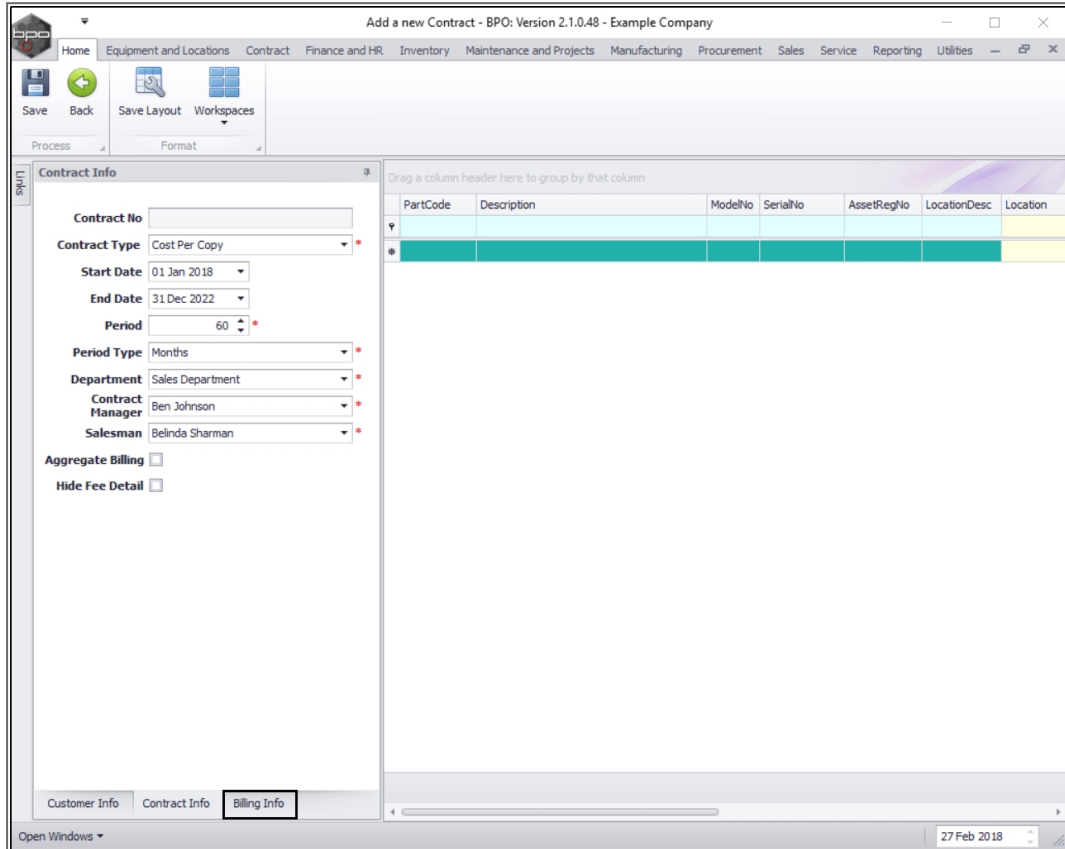
Customer Info | **Contract Info** | Billing Info

Open Windows

27 Feb 2018

BILLING INFO

- When you have finished editing the contract info details, click on the **Billing Info** tab.

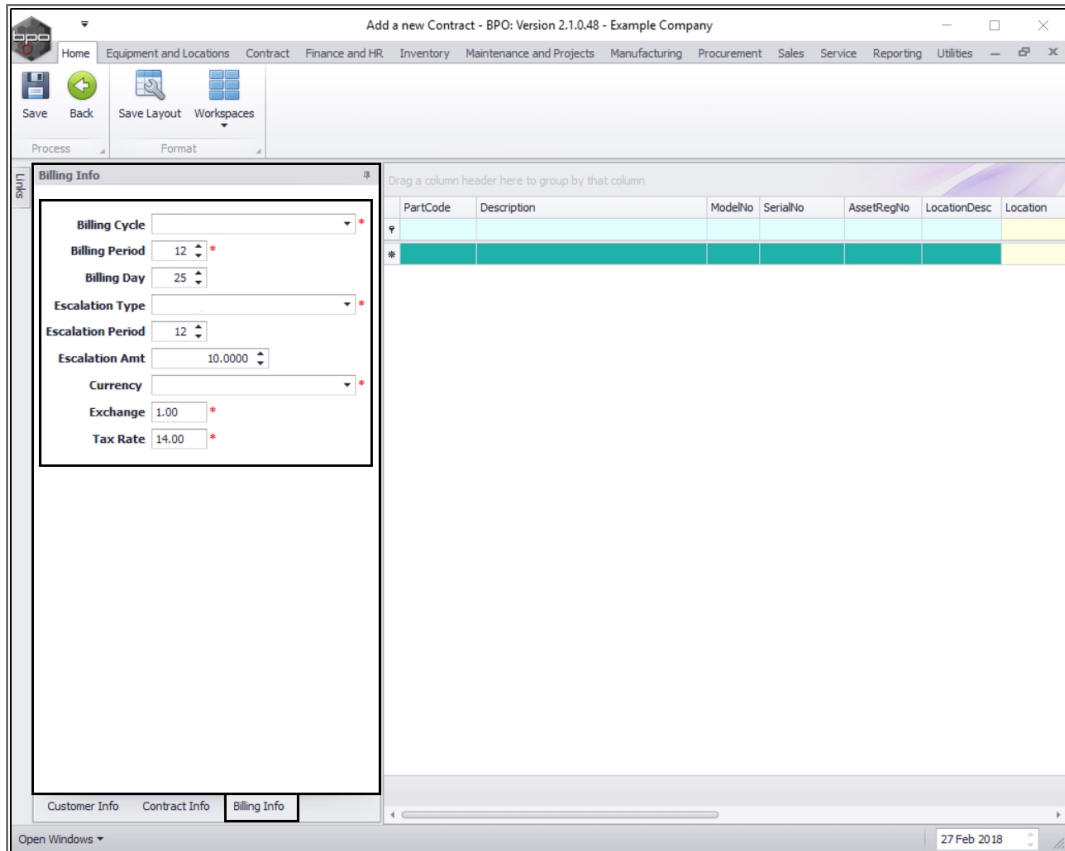


The **Billing Info panel** will be expanded.

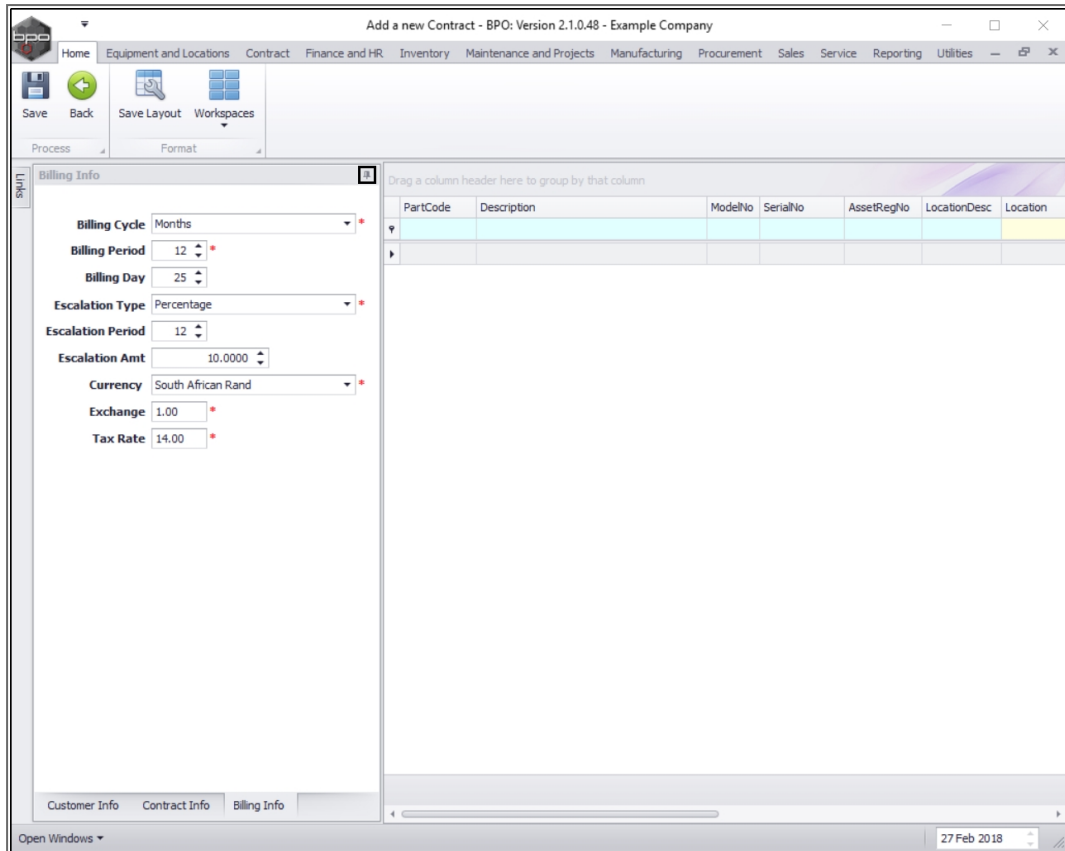
Some of these details will auto populate but they can be changed as explained below:

- Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- Billing Period:** This is the financial period in which billing will first begin. Type in or use the arrow indicators to select the period number (e.g., January = 11).

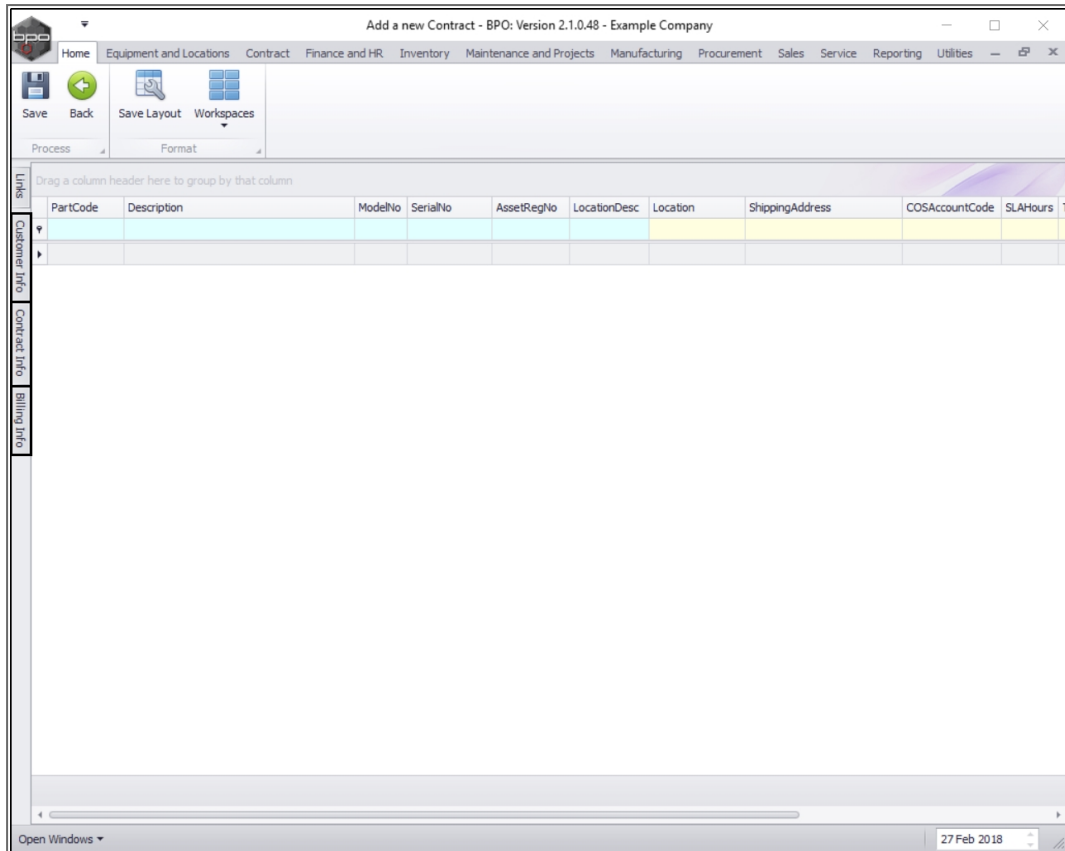
- **Billing Day:** Type in the day that the customer will be billed (e.g., on the 25th of each billing cycle).
 - The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the **Contract Billing** screen. The Billing Day is limited to 31. You can type in the day that the customer will be billed (e.g., on the 25th of each billing cycle) else leave as 0.
- **Escalation Type:** Search for and Select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g., 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
 - **Note:** If this escalates on the anniversary of the contract, then use the same financial period as the billing period.
- **Currency:** The system will auto populate with the currency already set up on the customer but you can click on the drop-down arrow and select an alternative currency if required.
 - **Note:** For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g., type in the dollar amount if the currency is USD.
- **Exchange:** Type in the exchange rate.
- **Tax Rate:** Type in the tax rate.



- When you have finished editing the Billing Info panel, you can **hide (dock)** the panel to make it easier to work in the **Items** frame.
- Click on the **docking icon** in the billing panel.

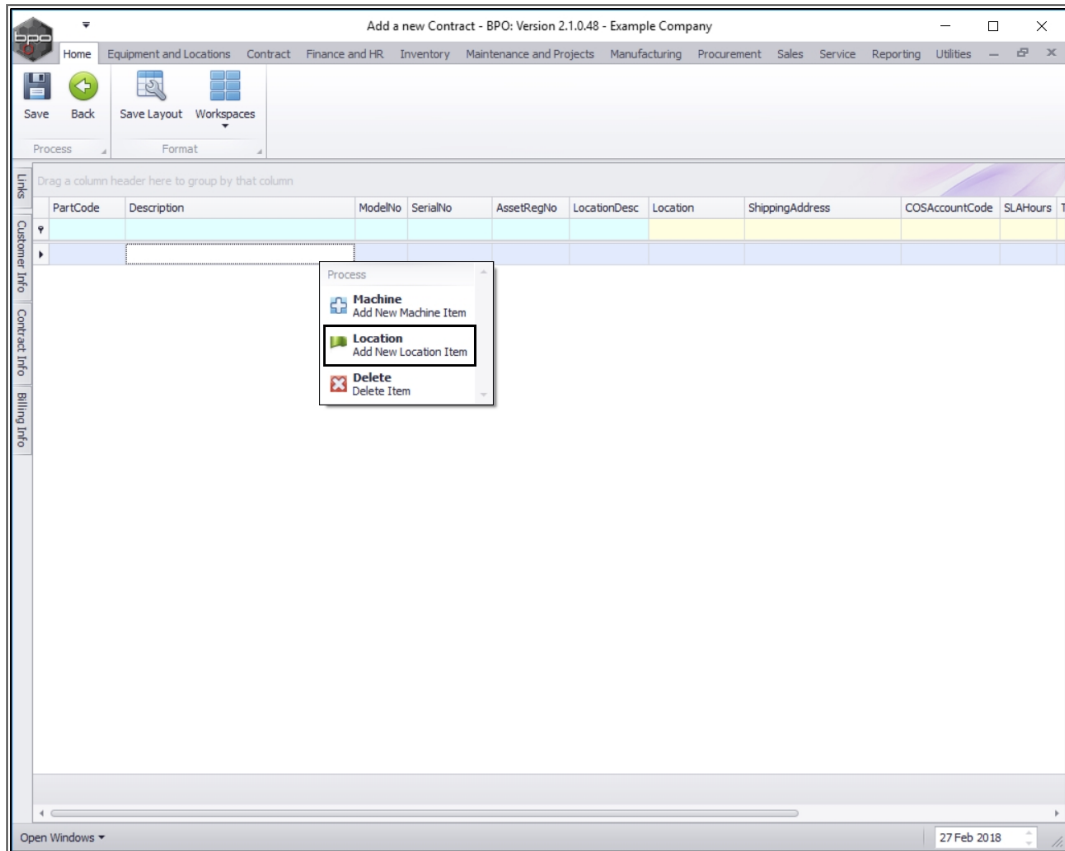


- The **Customer Info**, **Contract Info** and **Billing Info** panels will now be reduced to **tabs** at the side of the screen.

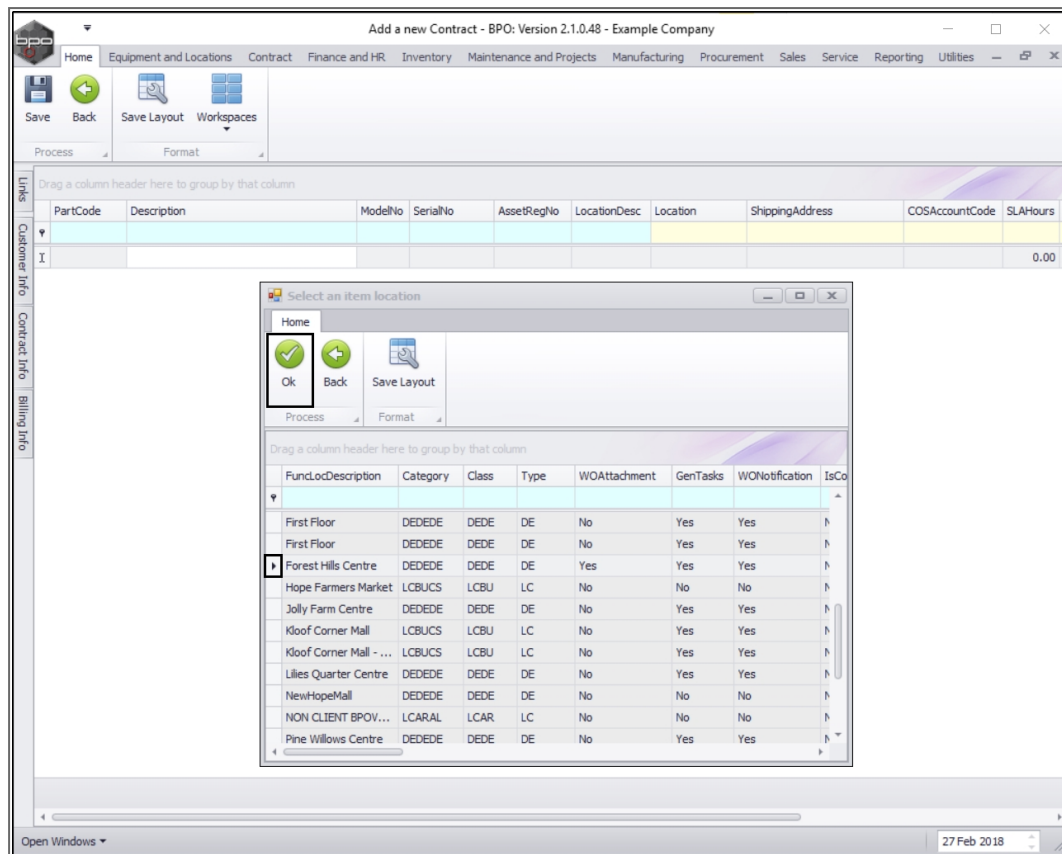


ADD LOCATION

- **Right click** anywhere in the **row** of the **Parts** frame.
- A **Process** menu will pop up.
- Click on **Location** - Add New Location Item.



- The **Select an item location** pop up screen will appear.
- Select the **row** of the **item location description** that you wish to **add**.
- Click on **Ok**.



Add a new Contract - BPO: Version 2.1.0.48 - 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
I									0.00	

Links Customer Info Contract Info Billing Info

Open Windows 27 Feb 2018

Select an item location

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

FunLocDescription	Category	Class	Type	WOAttachment	GenTasks	WONotification	IsCo
First Floor	DEDEDE	DEDE	DE	No	Yes	Yes	
First Floor	DEDEDE	DEDE	DE	No	Yes	Yes	
Forest Hills Centre	DEDEDE	DEDE	DE	Yes	Yes	Yes	
Hope Farmers Market	LCBUCS	LCBU	LC	No	No	No	
Jolly Farm Centre	DEDEDE	DEDE	DE	No	Yes	Yes	
Kloof Corner Mall	LCBUCS	LCBU	LC	No	Yes	Yes	
Kloof Corner Mall - ...	LCBUCS	LCBU	LC	No	Yes	Yes	
Lilies Quarter Centre	DEDEDE	DEDE	DE	No	Yes	Yes	
NewHopeMall	DEDEDE	DEDE	DE	No	No	No	
NON CLIENT BPOV...	LCARAL	LCAR	LC	No	No	No	
Pine Willows Centre	DEDEDE	DEDE	DE	No	Yes	Yes	

- The selected item location description will now populate the **Location Description** text box.

Add a new Contract - BPO: Version 2.1.0.48 - 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	TravelRadius	TravelCh
					Forest Hills Centre				0.00	0	

Links

Customer Info

Contract Info

Billing Info

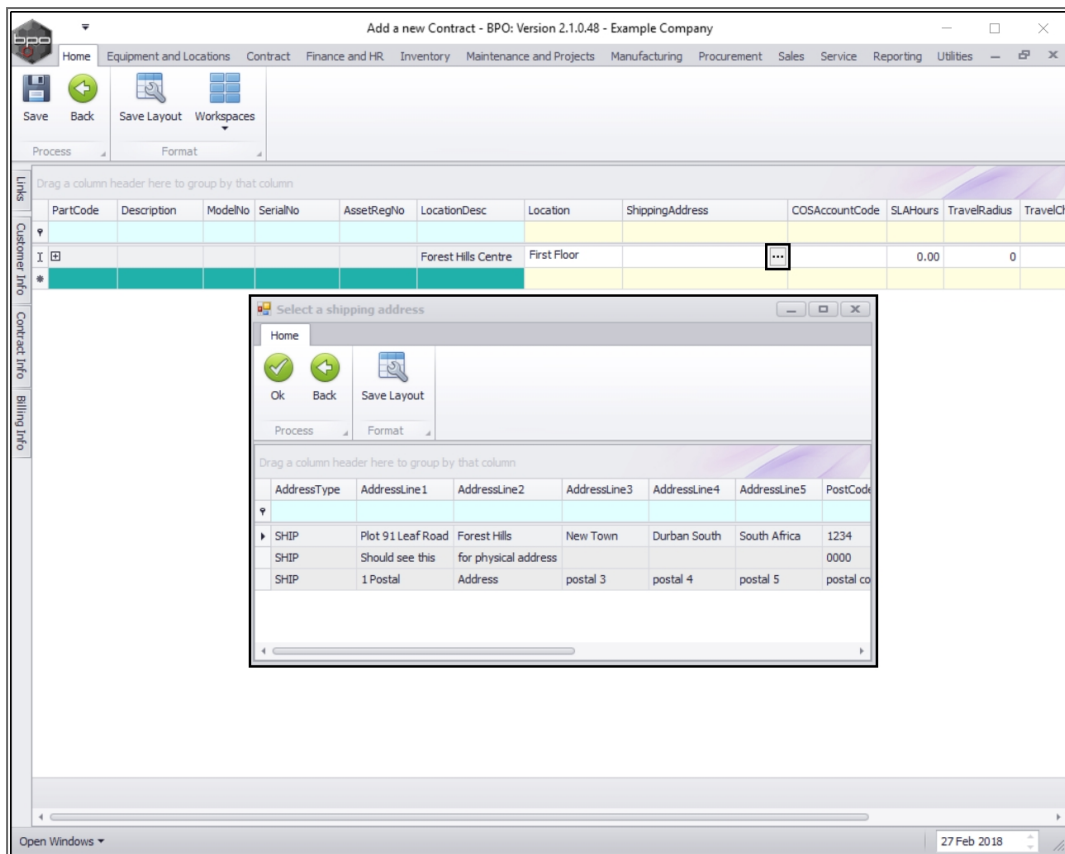
Open Windows

27 Feb 2018

- Click in the **Location** text box.
- Type in a **location** for this item.

SHIPPING ADDRESS

- CO3 Technologies (Pty) Ltd © Company Confidential



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	TravelRadius	TravelCh
					Forest Hills Centre	First Floor			0.00	0	

Customer Info | Contract Info | Billing Info

Open Windows | 27 Feb 2018

Select a shipping address

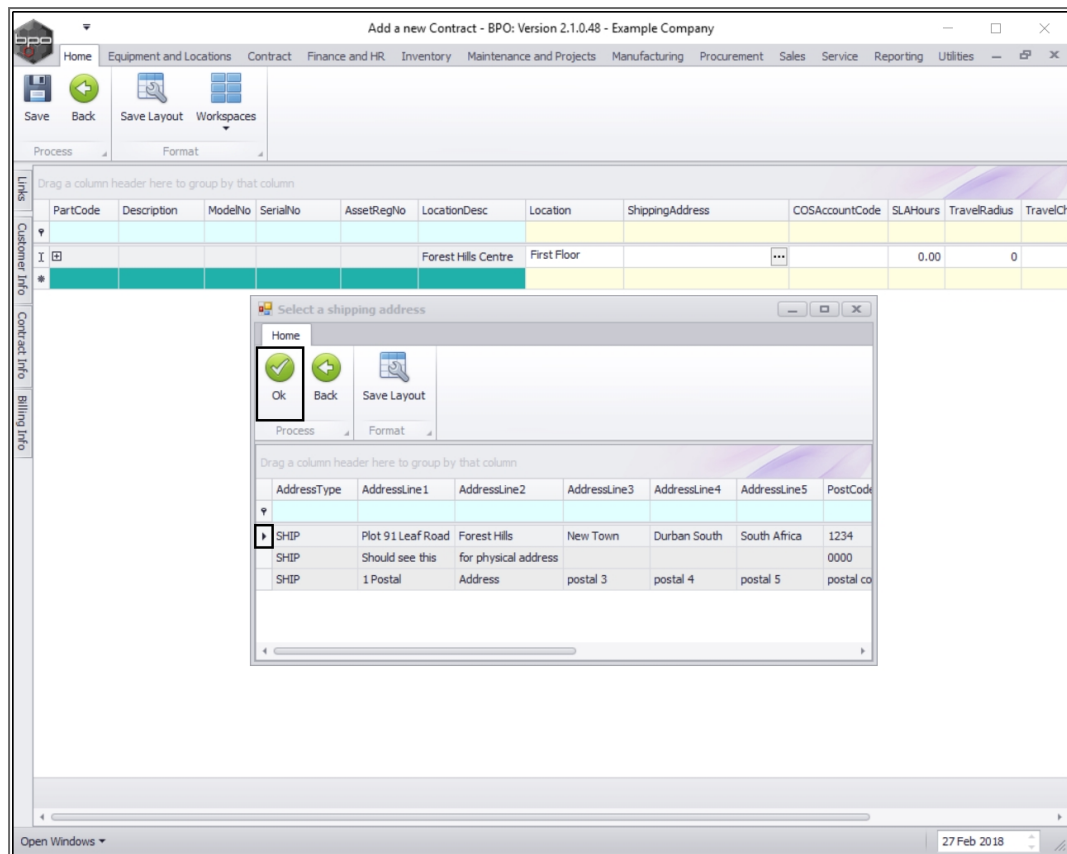
Home | Ok | Back | Save Layout

Process | Format

Drag a column header here to group by that column

AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode
SHIP	Plot 91 Leaf Road	Forest Hills	New Town	Durban South	South Africa	1234
SHIP	Should see this	for physical address				0000
SHIP	1 Postal	Address	postal 3	postal 4	postal 5	postal co

- Select the **row** of the **shipping address** that you wish to **link** to this **location item**.
- Click on **Ok**.



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	TravelRadius	TravelCh
					Forest Hills Centre	First Floor			0.00	0	

Customer Info Contract Info Billing Info

Open Windows 27 Feb 2018

Select a shipping address

Home

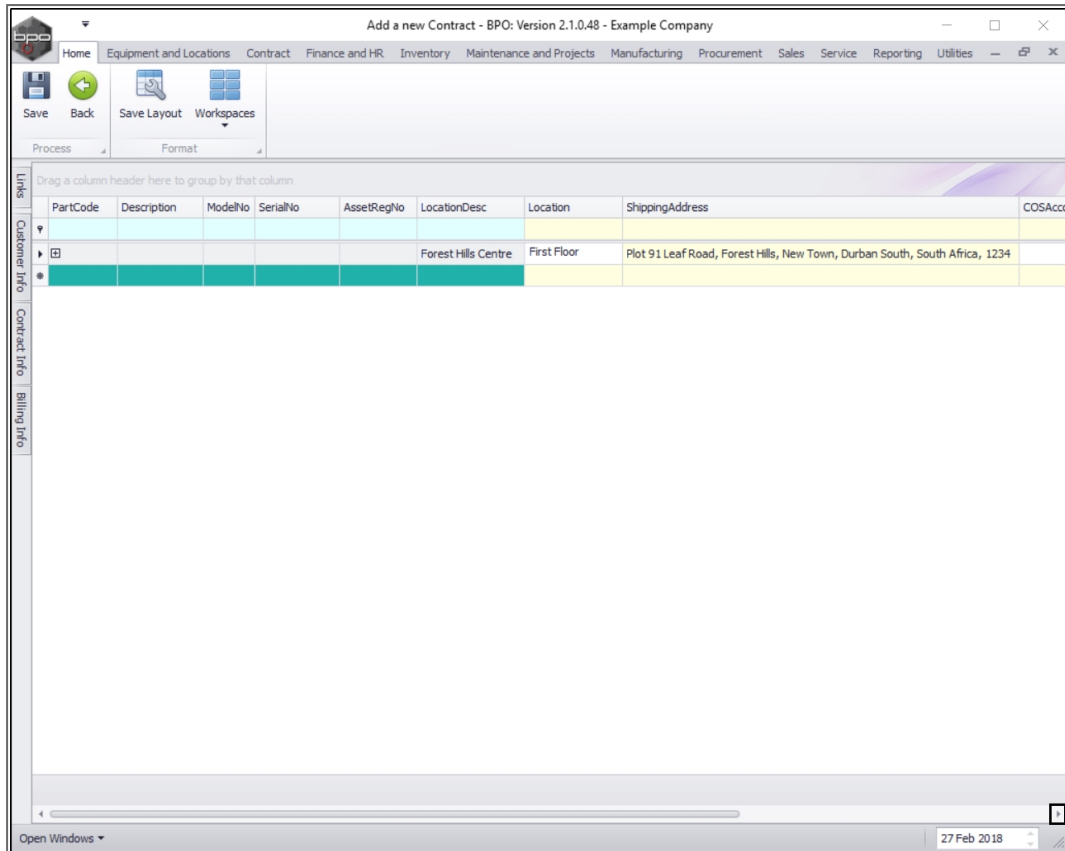
Ok Back Save Layout

Process Format

Drag a column header here to group by that column

AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode
SHIP	Plot 91 Leaf Road	Forest Hills	New Town	Durban South	South Africa	1234
SHIP	Should see this	for physical address				0000
SHIP	1 Postal	Address	postal 3	postal 4	postal 5	postal co

- **Scroll right** to view the remaining columns in the Items frame.



PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAcc
					Forest Hills Centre	First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	

COS ACCOUNT CODE

- Click in the **COS Account Code** text box.
- Type in the **Cost of Sales account code** to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).

Add a new Contract - BPO: Version 2.1.0.48 - 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

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102	0.00	0	0.00		No	A

Customer Info Contract Info Billing Info

Open Windows 27 Feb 2018

SLA HOURS

- Click in the **SLA Hours** text box.
- Type in or use the arrow indicators to select the required Call response time (in hours).

Add a new Contract - BPO: Version 2.1.0.48 - 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

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102	5	0	0.00		No	A

Customer Info Contract Info Billing Info

Open Windows 27 Feb 2018

TRAVEL RADIUS

- Click in the **Travel Radius** text box.
- Type in or use the arrow indicators to select the distance (in kilometres) to and from the client, if this travel is to be billed every time a Call is logged. If travel is included, then set this to **0**.
 - **Note:** Travel can always be billed separately, if required.

Add a new Contract - BPO: Version 2.1.0.48 - 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

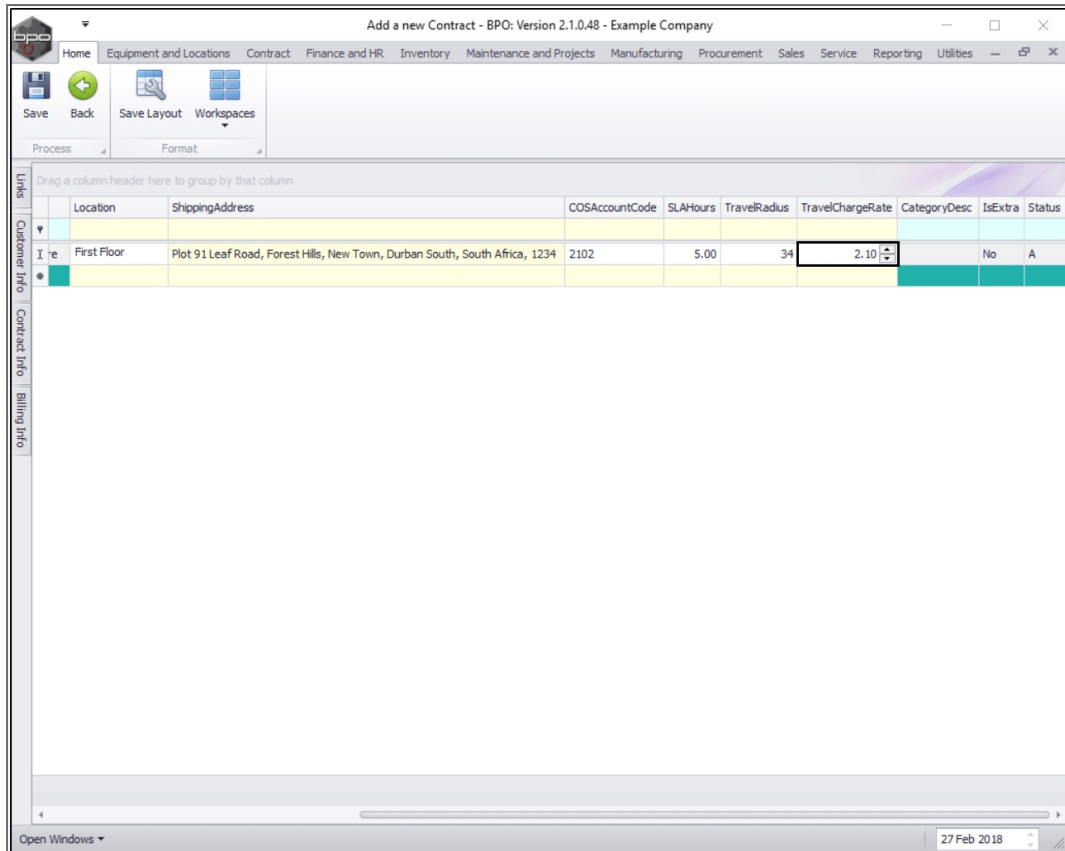
Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102	5.00	34	0.00		No	A

Customer Info Contract Info Billing Info

Open Windows 27 Feb 2018

TRAVEL CHARGE

- Click in the **Travel Charge Rate** text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g., Rands per kilometre).



Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102	5.00	34	2.10		No	A

- The **Category Description**, **Is Extra** and **Status** fields are static.

ADD ITEMS

- **Scroll left**, so that you can view the **Part Code** column again.

Add a new Contract - BPO: Version 2.1.0.48 - 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

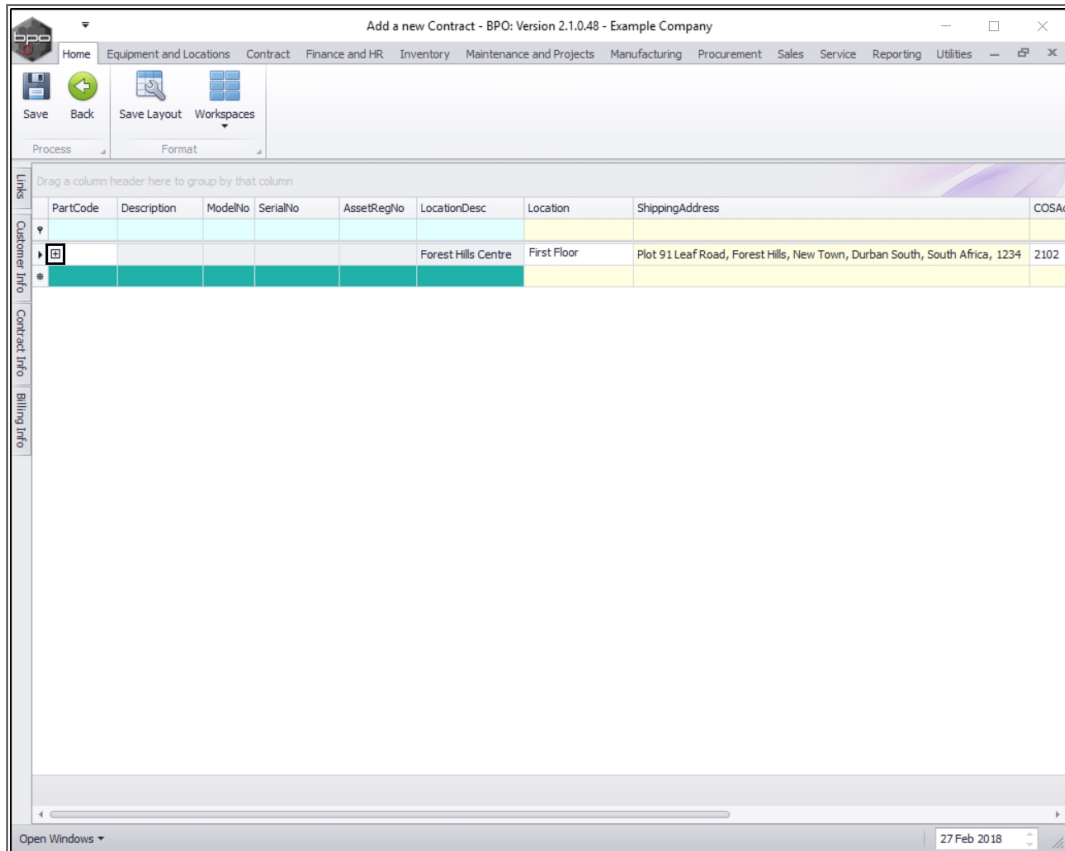
Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102	5.00	34	2.10		No	A

Links

Customer Info Contract Info Billing Info

Open Windows 27 Feb 2018

- Click on the **expand** button in the **Part Code** text box.



PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAd
					Forest Hills Centre	First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102

- The selected location **Item** frame will be expanded.
- In this frame are **4** different tabs:
 - **Item Fees:** monthly charges
 - **Item Meters:** meter usage charges
 - **Item Inclusions:** items not to bill
 - **Item Contacts:** the contact person - per location item

Add a new Contract - BPO: Version 2.1.0.48 - 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

Drag a column header here to group by that column

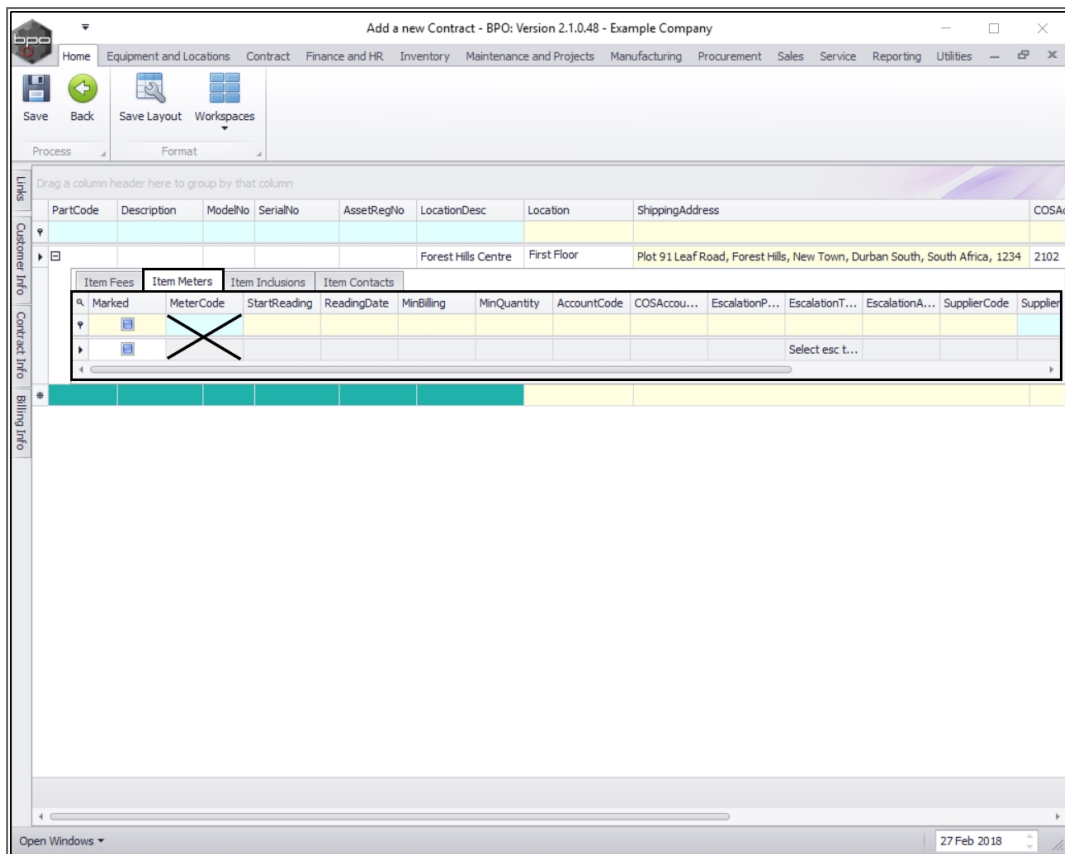
PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAd
					Forest Hills Centre	First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102

Item Fees Item Meters Item Inclusions Item Contacts

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Escalate
<input type="checkbox"/>	E	Evergreen ...	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	L	Loan	0.00	1200			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	R	Bank Rental	0.00	1204			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	S	Service	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	I	Inhouse Re...	0.00	1201			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	N	Insurance	0.00	1203			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	REN	Standard R...	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
<input type="checkbox"/>	W	Renew Fee	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			0.00										

Open Windows 27 Feb 2018

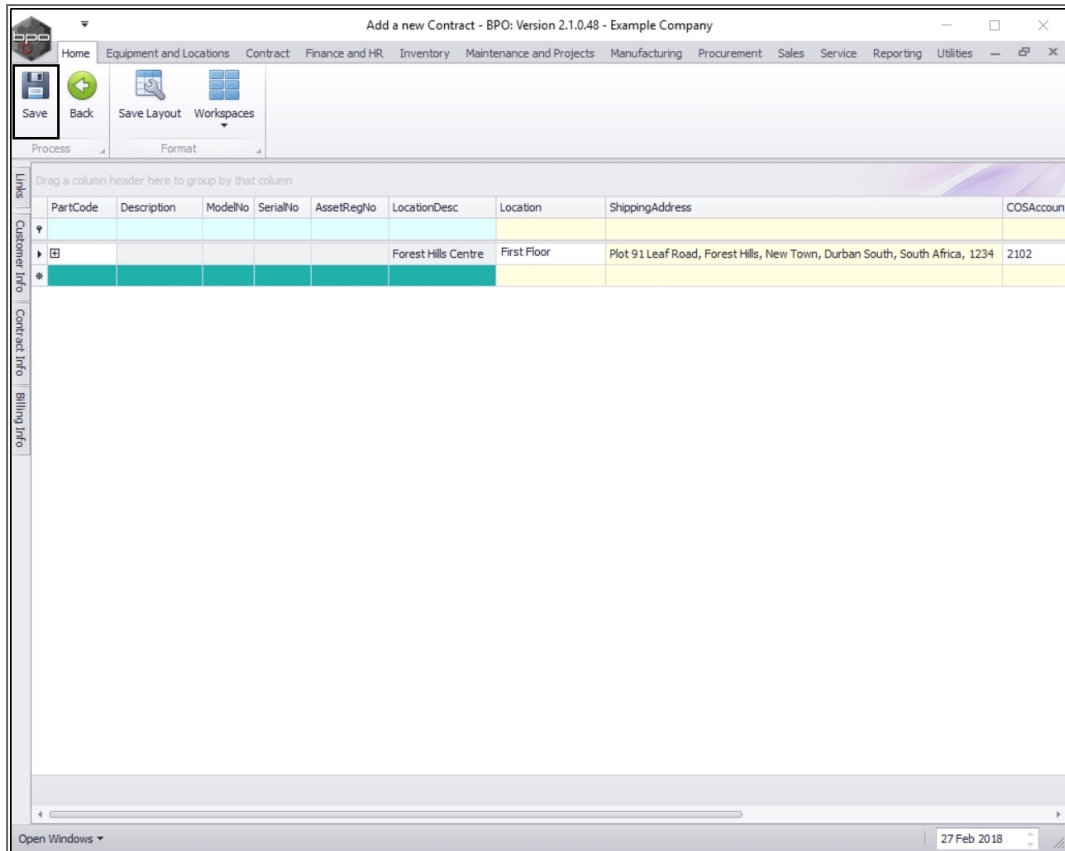
- **Note:** In the Items Frame, you will not be able to add **Item Meters** as this is a Location Contract not a Machine Contract and you cannot link meters to a location.



- To add Location Item Fees, Location Item Inclusions and Location Item Contacts, click on the following link and follow the processes as set out in the [Contracts - Create A New Contract](#) manual.
- You can continue to add contract location items as required, however additional items can also be added later.

SAVE LOCATION CONTRACT

When you are finished, click on **Save**.



PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAAccount
					Forest Hills Centre	First Floor	Plot 91 Leaf Road, Forest Hills, New Town, Durban South, South Africa, 1234	2102

- The new contract can be found within the **New** contract status.
- From here the contract will need to be **Released** and **Approved** before it becomes active.

MNU.112.041

