

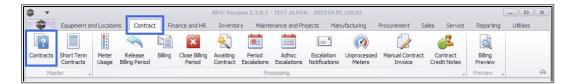
CONTRACTS

ADD NEW LOCATION CONTRACT (POST V2.3.0.0)

A <u>Customer Location</u> 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 image *Pretoria* has been selected.



Home Equi	pme			ntract Listing - BPO: Version 2.3.0. and HR Inventory Maintenance and old 🚓 Release For Approval	d Projects Ma	nufactu Durbar	ring Procurement	Eind Service Reporting U	
Add Edit Delete	2	View		elease Prove From Approval	Close Contract	ID 0 1	All Sites Durban	Print Export	
Processing		a Fi	ormat 🚽	Status Processing	4	2	Pretoria	Print	a Repo a
inks 1						3 4	Test East London		
The text to search P		ContractNo	CustomerCode	CustomerName	CustomerDe			Desc	Location
Functions	٩	ROC	BBC	RBC	RBC	x			8 8 C
		CO0000146	DON0001	Dont Run with Scissors	Sales Depart	nent	CPC	Cost Per Copy	Main
Notes	CO0000190 ABCXYZ123 ABC Shoe Co CO0000147 DON0001 Dont Run with Scissor	ABC Shoe Co	Sales Depart	nent	CPC	Cost Per Copy	Main		
	CO0000147 DON0001 Dont Run with S	Dont Run with Scissors	Sales Depart	nent	CPC	Cost Per Copy	Main		
		CO0000148	SAM001	Samanthas Diner	Sales Depart	nent	CPC	Cost Per Copy	Main
Documents		CO0000151	SAM001	Samanthas Diner	Sales Depart	nent	CPC	Cost Per Copy	Main
		CO0000152	SAM001	Samanthas Diner	Sales Depart	nent	CPC	Cost Per Copy	Main
		CO0000154	DON0001	Dont Run with Scissors	Sales Depart	nent	CPC	Cost Per Copy	Main
Hold History		CO0000155	JUS001	Just In Time	Sales Departs	nent	CPC	Cost Per Copy	Main
1.000000000000000000000000000000000000		CO0000156	JUS001	Just In Time	Sales Depart	nent	CPC	Cost Per Copy	Main
		CO0000157	DON0001	Dont Run with Scissors	Sales Departs	nent	CPC	Cost Per Copy	Main
Suspend History		CO0000159	APP0001	Apple Juice Inc	Sales Depart	nent	CPC	Cost Per Copy	Main
Susperioriistory		CO0000160	BET0001	Betties Summer Shop at the Beach	Sales Depart	nent	CPC	Cost Per Copy	Main
		CO0000161	BET0001	Betties Summer Shop at the Beach	Sales Depart	nent	CPC	Cost Per Copy	Gillits
		CO0000162	JUS001	Just In Time	Sales Departs	nent	CPC	Cost Per Copy	Main
		CO0000163	JUS001	Just In Time	Sales Depart	nent	CPC	Cost Per Copy	Main
D		CO0000164	BIG0001	Big Bargains	Sales Depart	ment	CPC	Cost Per Copy	Main
Processing		CO0000165	JUS001	Just In Time	Sales Depart	ment	CPC	Cost Per Copy	Main
Invoices		CO0000166	BIL0001	Billys Barn	Sales Depart	nent	CPC	Cost Per Copy	Main
		CO0000167	BIL0001	Billys Barn	Sales Depart	nent	CPC	Cost Per Copy	Main
		CO0000168	BOT0001	Bothas Networking inc	Sales Depart	nent	CPC	Cost Per Copy	Main

- 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.
- 2. Click on *Add*.



dd Edit Delete Processing	View Si		Suspend & Remove From A Release P Approve Contra Status Processing	Close			0 4
ter text to search P	Drag a column hea	der here to group by the CustomerCode	nat column	CustomerDeptName	ContractTurns	ContractTypeDesc	Location
Functions		alle	allic	80c	RDc	ABC ABC	REC
unctions	CO0000233	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Durban Area
Notes	CO0000233	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Durban Area
	CO0000241	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Gillits
	CO0000244	OUA001	Ouality Printers	buice organisment	CPC	Cost Per Copy	Gillits
Documents	CO0000245	QUA001	Quality Printers		CPC	Cost Per Copy	Gillits
	CO0000247	THR001	The Real		CPC	Cost Per Copy	Gillits
	CO0000248	PAM001	Pam Holdings		CPC	Cost Per Copy	Durban Area
Hold History Suspend History							
rocessing							

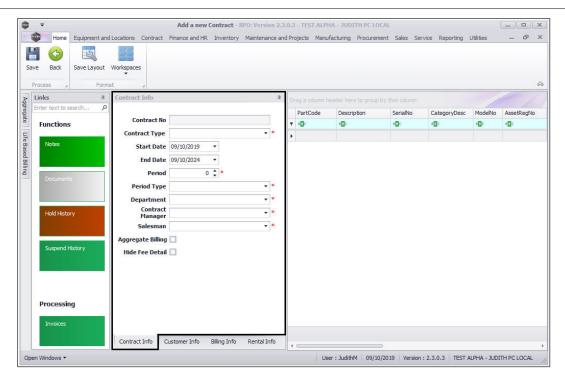
• The *Add a new Contract* screen will be displayed.

CONTRACT INFO PANEL

Upon opening this screen, the Info panels are docked, with the *Contract Info* panel at the fore.

- If not, click on the *Contract Info* tab.
- The *Contract Info panel* will move to the fore.



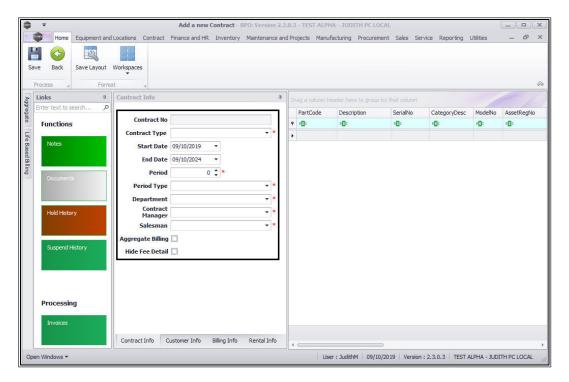


Contract Info Panel Details

- **Contract No:** The contract number is generated by the system (if the Auto Contract flag is selected in *BPO Configurator*).
- **Contract Type:** Click on the drop-down arrow and select the **Contract Type** e.g., Cost per Copy.
- **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 <u>alternative</u> 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 <u>alternative</u> end date if required.
 - Note: If this is an Evergreen contract, set your end date to 31/12/2999.
- **Period:** This will auto populate when the Contract Type is selected but you can either type in or use the arrow indicators to select an alternative period of the contract (life span of the contract).



- **Period Type:** This will auto populate when the Contract Type is selected but you can click on the drop-down arrow and select an alternative period type (measure relating to the lifespan), e.g., 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. Refer to aggregate billing for more information.
- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.





CUSTOMER INFO PANEL

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

•		Add a new Contract - B	PO: Version 2.3	1.013	- TEST ALP	HA - JUDITH PC LO	CAL) x
Home Equipment a	and Locations Contract	Finance and HR Inventory	Maintenance an	d Pr	ojects Manu	afacturing Procurer	ment Sales Se	rvice Reporting	Utilities	- 6	×
	t Workspaces										\$
> Links	Contract Info		ц	1							
Enter text to search	α							CategoryDesc	ModelNo	AccetDer	No
Functions	Contract No			9	*Br Code			CALCULATION OF A CALCUL		1 KOCK 28 D A 10647	110
5	Contract Type	Maintenace Contract	+ *					at column SerialNo CategoryDesc ModelNo AssetRegNo			
n Notes	Start Date	01/10/2019 🔹									
ed Bi	End Date	01/10/2024 •						Service Reporting Utilities - 2 ×			
Ing	Period	60 🛟 *									
Documents	Period Type	Months	÷ *								
	Department	Sales Department	- *								
Hold History	Contract Manager	Judith Mudzengi	• •								
	Salesman	Judith Mudzengi	* *			g a column header here to group by that column PartCode Description SerialNo CategoryDesc ModelNo AssetRegNo					
Process Foo For Control of Contro	Aggregate Billing Hide Fee Detail										
Processing											
	Contract Info C	ustomer Info Billing Info	Rental Info	4	c		>				×
Open Windows 🕶					Us	er : JudithM 09/1	0/2019 Version	: 2.3.0.3 TEST A	Alpha - Judi	TH PC LOC	AL //

The *Customer Info* panel will move to the fore.

Customer Info Panel Details

- **Customer:** Click on the search button and select the customer from the *Select a customer for this contract* pop up screen.
- Address: This will autopopulate but you can 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 <u>must</u> 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.

٩	Ŧ			Add a new	Contract - B	PO: Version 2	3.0.3	- TEST ALP	HA - JUDITH PCLO	DCAL			_ D X
	Home	Equipment and	Locations Contrac	t Finance and HP	R Inventory	Maintenance a	and Pr	ojects Manu	facturing Procure	ment Sales Ser	rvice Reporting	Utilities	- & ×
	Ve Back	Save Layout	Workspaces										
	Process	Forma	÷										\$
	Links	ц	Customer Info			ŋ	u p						
Jrega	Enter text to s	earch P						PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo
te	Functions		Custom			• م	٩	a 🗖 c	n 🛛 c	R <mark>B</mark> C	8 <mark>0</mark> C	a n c	#DC
Life	Notes		Addre	55		* م							
Aggregate Life Based Billing	Document Hold Histo Suspend H	ry	Order 1 Require Locatio	d 🗌		*							
	Processir Invoices	ng	Contract Info	Customer Info	Billing Info	Rental Info	4			2			Þ
Ор	en Windows 🔻							Us	er : JudithM 09/1	0/2019 Version	: 2.3.0.3 TEST 4	ILPHA - JUDI	TH PC LOCAL

BILLING INFO PANEL

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



• •			Add a new	Contract - B	PO: Version	2.3.0.	3 - TEST ALP	HA - JUDITH PC LC	CAL			_ [] X
Home E	quipment and	Locations Contract	Finance and HR	Inventory	Maintenance	and Pi	ojects Manu	ufacturing Procurer	nent Sales Se	rvice Reporting	Utilities	- 8 ×
Save Back S	ave Layout	Workspaces										
Process	Forma	•										~
& Links	ņ	Customer Info				#						
Enter text to sear	rch P						PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo
Functions		Customer	Hope Works		• م	9	a 🖸 c	allo	a Dic	ROC	s C	n 🛛 c
Enter text to sear Functions		Address	26 Lavendar 94A Crompton Pinetown Cent Pinetown 3610		* م +	•						
Ing		Order No										
Documents		Required										
		Location	Pretoria 1		•							
Hold History Suspend Hist												
Processing		Contract Info C	Sustomer Info	Billing Info	Rental Info				_			
Open Windows -								ser : JudithM 09/1	0/2019 Version	: 2.3.0.3 TEST A	LPHA - JUDI	TH PC LOCAL

The *Billing Info panel* will be expanded.

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

Billing Info panel Details

- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- **Billing Period:** This is the period when the contract will be billed for the first time. Type in or use the arrow indicators to select the period number.
 - Note: The Billing Period relates to the financial period of the company eg if the company's financial year ends on 31 December and a contract is to be billed in February, the Billing Period would be 2.
- **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: The Escalation Period relates to the financial period of the company eg if the company's financial year ends on 31 December and a contract is to be escalated in March, the Escalation Period would be 3. If the escalation is 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:** The system will auto populate with the exchange rate set up but you can type in an alternative exchange rate.



• **Tax Rate:** The system will auto populate with the tax rate set up but you can type an alternative tax rate.

Process 4 For	mat								
Links a	Billing Info		4	Drag a col					
Enter text to search ۶				PartCo	le Description	SerialNo	CategoryDesc	ModelNo	AssetRegN
Functions	Billing Cycle Mo		• •	9 # 1 0	8 B C	n 🖬 c	8 B C	s o c	n∎c
Notes	Billing Period	10 🜲 *		*					
Notes	Billing Day	0 🗘							
	Escalation Type Pe	rcentage	• *						
Documents	Escalation Period	10 🌲							
and a second	the second state and								
	Escalation Amt	0 🜲							
	1	0 🌲	• *						
Hold History	1	outh African Rand	•						
Hold History	Currency So Exchange 1.0	outh African Rand	•						
Hold History	Currency So	outh African Rand	*						
Hold History Suspend History	Currency So Exchange 1.0	outh African Rand	• *						
	Currency So Exchange 1.0	outh African Rand	*						
	Currency So Exchange 1.0	outh African Rand	•						
	Currency So Exchange 1.0	outh African Rand	•]*						
Suspend History	Currency So Exchange 1.0	outh African Rand	•]*						
	Currency So Exchange 1.0	outh African Rand	•]*						

RENTAL INFO PANEL

- 1. This used for a third party *rental* contract.
 - ° For more information please refer to Rental Contract.

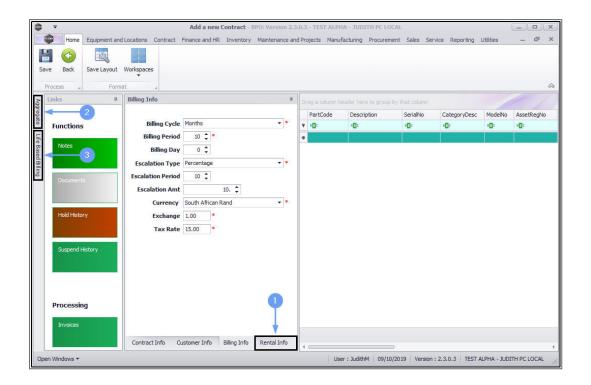
AGGREGATE PANEL

- 2. This is used when creating an Aggregate contract or Prepaid / Life Based contract.
 - For more information, refer to Aggregate contract and Prepaid / Life Based contract.



LIFE BASED BILLING PANEL

- 3. This is used when creating a Prepaid / Life Based contract.
 - ° For more information, refer to Prepaid / Life Based contract.



ADD NEW LOCATION ITEM

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



	Ŧ			Add a n	ew Contract -	BPO: Version 2.	3.0.3	B - TEST ALPH	IA - JUDITH PC LOC	AL		orting Utilities — é	- D X
15	Home	Equipment and	Locations Cont	ract Finance and	HR Inventory	Maintenance ar	nd Pr	ojects Manu	facturing Procureme	nt Sales Sei	vice Reporting	Utilities	_ @ ×
s	ave Back	Save Layout	*										\$
Agg	Links	4	Billing Info			1	D	rag a column h					
rega	Enter text to s	earch P		50 (1 77)		1.923		PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo
ö	Functions		Billing	Cycle Months		• *	٩	8 <mark>8</mark> 0	n <mark>a</mark> c	R <mark>B</mark> C	A C	880	REC
Life	in the second second		Billing P	eriod 10 🛟			٠						
Base	Notes		Billing	Day 0 🗘				Process					
Aggregate Life Based Billing			Escalation	Type Percentage		* *		Add Ne	ne w Machine Item				
Ðu	Document	5	Escalation P	eriod 10 🗘				Locat	on				
			Escalation	Amt	1þ. ‡			28135032	w Location Item				
			Curr	ency South Afric	an Rand	•		Delete	e Item				
	Hold Histo	ry	Exch	ange 1.00	1					6			
			Тах	Rate 15.00	•								
	Suspend H	listory											
	Processin	a											
		9											
	Invoices												
			Contract Info	Customer Info	Billing Info	Rental Info							
Viller	100.25		Conductino	castonici 1110	5 m lg 1110	recreat title	4	C	C.			100.000 (100.000	•
Op	oen Windows 🔻							Us	er : JudithM 09/10/	2019 Version	: 2.3.0.3 TEST A	ILPHA - JUDI	TH PC LOCAL

- 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.



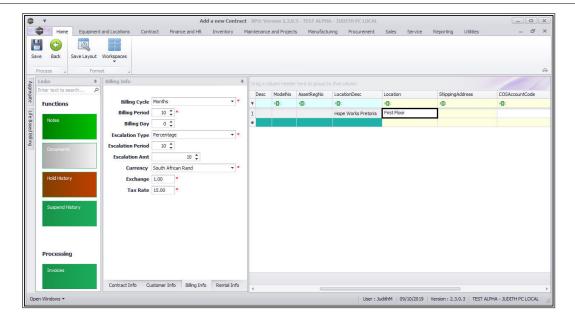
•	₩ Home	Equipment and	Locations Contract	Add a new Contract						rvice Reporting	Litilities		x x
	we Back	Save Layout	Workspaces		,								\$
	Links	4	Billing Info		ġ		ag a column h					1	
Aggregate	Enter text to s	earch P					PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	
ate	Functions		Billing Cycle	Months	- *	ę	8 <mark>0</mark> 0	-8-	R B C	REC	8 E C	REC	
Ę			Billing Period	10 🛟 *		I							
e Ba	Notes		Billing Day	0 2									
Life Based Billing			Escalation Type		•		Select	t an item location			-		1
IIIng			Escalation Period	10 ‡			Home						4
-	Document	5					\sim	(2)					
			Escalation Amt	10. 🗘			Ok	Back Save Layo					
			Currency	South African Rand	+ *		UN	buck buve cuyor	ur.				
	Hold Histor	у	Exchange	1.00 *			Process	s "Format	4			~	
			Tax Rate	15.00 *			Drag a col						
	Suspend H	interes.					FuncLo	cDescription		C	ategory	Class	
	susperiu r	istory					9 8 0 0			я	a c	8 0 0	
							Hope W	Vorks Gillits 5		D	EDEDE	DEDE	
							A CONTRACTOR OF	Vorks Nineth Floor		D	EDEDE	DEDE	
							and the second	Vorks Pretoria		D	EDEDE	DEDE	
	Processin							Vorks Reception			EDEDE	DEDE	
	FIUCESSII	9					Hope W	Vorks Second Floor		D	EDEDE	DEDE *	
	Invoices						L					_	4
					D 117.5								
			Contract Info Cu	istomer Info Billing Info	Rental Info	4	C		2				÷
Op	en Windows 🔻						Us	er : JudithM 09/10	/2019 Version	: 2.3.0.3 TEST A	ALPHA - JUDI	TH PC LOCAL	

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

*					2.3.0.3 - TEST ALP						
Home Equipment a	nd Locations Contr Vorkspaces	ract Finance	and HR Inventory	Maintenance and I	Projects Manufa	cturing Procu	rement Sales	Service	Reporting	Utilities	- 8
	ے Billing Info			Drag a column	header here to group	by that column					
Enter text to search P				PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
Functions	Billing Cycle			9 : 0 0	a 🗖 c	e n c	a ⊡ c	a n c	4 D ¢	A D C	e ⊡ c
Notes	Billing Period	10 🗘 *		• •						Hope Works Pretoria	
Notes	Billing Day	0 ‡		*							
	Escalation Type	Percentage		8							
Documents	Escalation Period	10 🌲									
	Escalation Amt		10 🗘								
	Currency	South African Ra	and 👻 *	6							
Hold History	Exchange	1.00 *									
	Tax Rate	15.00 *									
Suspend History											
Processing											
Invoices	Contract Info Cu	istomer Info	Biling Info Rental Info	4 0							
							User : JudithM 0				

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





- Click in the *Shipping Address* text box.
- An *ellipsis* button will be revealed.
- Click on this button to display the *Select a shipping address* pop up screen.

٢	Ŧ				Add a new Contra	ct - B	PO: Versio	n 2.3.0.3 - 1	EST ALPHA -	JUDITH PC LC	CAL				(_)(
	Home	Equipment	and Locations Co	ontract Finan	ce and HR Inventory	Main	tenance and	Projects	Manufacturin	g Procurem	ent Sales	Service	Reporting	Utilities	-	₽ ×
	ave Back	Save Layout Forma	*													\$
2	Links		Billing Info		1											1
Aggregate Life Based Billing	Enter text to se	arch P				-	ModelNo	AssetRegN			Location	Shipping	Address	COSAccountCo	e SLAHours	1
ate	Functions		Billing Cyc	le Months	•	ę	-0-	nDc	4 0 0		n 0 :	n@c		1 0 0	-	
Life			Billing Perio	od 10 🗘 *		I			Hope W	orks Pretoria	First Floor					0.00
Base	Notes		Billing Da	iy 0 ‡		*										
od Bill			Escalation Typ	Percentage	• *		• - 5	elect a ship	ping address					-		
ing	Doguments		Escalation Perio	od 10 🛟			Hon	e								
			Escalation An	nt	10 🗘				2							
	4		Currenc	y South African	Rand 👻 •		Ok	Back	Save Layou							
	Hold History	,	Exchang	je 1.00 *												
			Tax Rat	te 15.00 *			P	ocess ,	Format	4					~	
							10000								/	
	Suspend His	story								AddressLine2	Addres	sLine3	AddressLine4	AddressLine5	AN CONTRACTOR OF THE OWNER OWNER OF THE OWNER OWNER OF THE OWNER	
							9 4 > St		26 Lavendar	94A Cromptor	soc	- Central	Pinetown		80°	
							• 5r	uP.	20 Lavendar	94A Cromptor	ist Pinetoi	in Central	Pinetown	NZN	0100	
	Processing	·														
	Invoices						4								• •	
	10000000		20-10/01/00/00/00/00 / /													
			Contract Info	Customer Info	Biling Info Rental Info	-			_							÷
Op	en Windows 🔻									Us	er : JudithM	09/10/2019	Version : 2.3	0.3 TEST ALPHA	- JUDITH PC LC	CAL //

• Select the *row* of the *shipping address* that you wish to *link* to this location item.



Click on Ok.

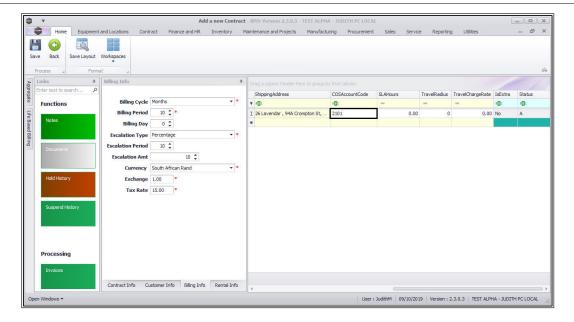
•		Add a new Contract	BPO	: Version	2.3.0.3 - TE	ST ALPHA - 3	UDITH PC L	DCAL				()(
Home Equipment a	and Locations Contract Finance a	nd HR Inventory Ma	sinten	ance and	Projects	Manufacturing	Procurer	nent Sales	Service	e Reporting	Utilities	-	₽ X
Save Back Save Layout Process	-												\$
Links #	Billing Info												1
Enter text to search P			м	odelNo	AssetRegNo	LocationD	esc	Location	Shipping	Address	COSAccountCo	de SLAHours	
6 Functions	Billing Cycle Months		9 1	C.	n 0 c	a 🗖 c		n 0 c	n o c		11 0 0	1.000	
5	Billing Period 10 🗘 *		I			Hope Wo	rks Pretoria	First Floor			1		0.00
w Notes	Billing Day 0 🜲		*		l.								
Appropriate Links a Enter text to search ρ Functions	Escalation Type Percentage	• •		Se Se	lect a shipp	oing address							
Documents	Escalation Period 10 🛟			Hom	2								
	Escalation Amt 1	0 🗘				2							
	Currency South African Ran	nd 🔹 •		Ok	Back	Save Layout							
Hold History	Exchange 1.00 *			OK	Datk	Save Layout							
	Tax Rate 15.00 *			Pri	ocess 4	Format						\diamond	
				Drag a								- / /	
Suspend History				Ad	dressType	AddressLine 1	AddressLine2	Address	Line3	AddressLine4	AddressLine5	PostCode	
				9 🕫		a 🗖 c	a 🗖 c	₽∎c		P C	a n c	ROC	
				► SH	IP :	26 Lavendar	94A Crompto	n St Pinetow	n Central	Pinetown	KZN	3610	
Processing													
				- C								÷.	
Invoices													
	Contract Info Customer Info Bi	ling Info Rental Info	4										
Open Windows 🕶							U	ser : JudithM	09/10/201	9 Version : 2.3.0	1.3 TEST ALPHA	A - JUDITH PC L	
			_	_					_				(63)

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

e Back	•		e and HR	Inventory N	laintenance an	anojeca n	anufacturing Procure	ment Sak	es Service Reporting Utilitie		- 8
rocess a Formal Links 4 Enter text to search	Billing Info			ņ	Drag a colum	n header here to	group by that column			/	
unter text to search	100 12	1.0		120	ModelNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHour
Functions	Billing Cycle			• •	Y nDc	* 0 *	R O C	n O c	A C	1 0 1	-
Notes	Billing Period				I		Hope Works Pretoria	First Floor	26 Lavendar , 94A Crompton St, •••		
Notes	Billing Day	0 ‡			*						
	Escalation Type	Percentage		- *							
Documents	Escalation Period	10 🌲									
	Escalation Amt		10 🗘								
	Currency	South African P	Rand	•							
Hold History	Exchange	1.00 *									
	Tax Rate	15.00 *									
Suspend History											
Processing											

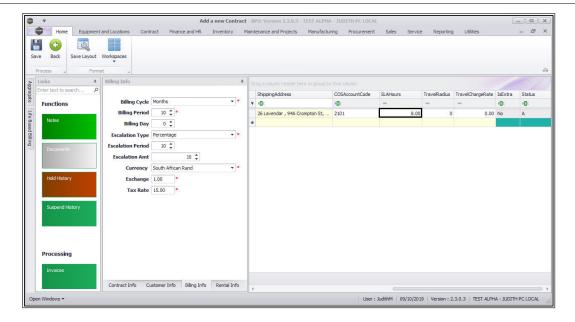
- Click in the *COS Account Code* text box.
- Type in the *Cost of Sales account code* to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).





- Click in the *SLA Hours* text box.
- Type in or use the arrow indicators to select the required call response time (in hours).
 - Note 1: If this is set up, SLA will apply every time a call is logged against the contract / contract location.
 SLA will be calculated based on the shift pattern (customer's trading hours) e.g if the trading hours are from 8am 5pm and a call is logged at 4pm, SLA will start calculating at 4pm and stop at 5pm and resume the following day at 8am.
 - Note 2 : For SLA to work, the shift must be set up in BPO Configurator and linked to the customer.





- Click in the *Travel Radius* text box.
- Type in or use the arrow indicators to select the distance in km's 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 2.3.0.3 - T	EST ALPHA - JUDITH PC LOCAL				- • ×
Home Equipment and Loc	ations Contract Finance and H	R Inventory M	laintenance and Projects	Manufacturing Procurement	Sales Service	Reporting U	Itilities	_ @ ×
Save Back Process								۵
Einks # Billin	g Info	ņ						
Links a billing Enter text to search /P Functions			ShippingAddress	COSAccountCode	SLAHours	TravelRadius Trave	ChargeRate IsExtra	Status
Functions	Billing Cycle Months	•	9 n@c	4 0 :	-		n O c	* 0 ¢
Efe	Billing Period 10 🗘 *		26 Lavendar , 94A Cron	npton St, 2101	8.00	0	0.00 No	A
B Notes	Billing Day 0 🌲		*					
Es Es	calation Type Percentage	- *						
8 Documents Esca	alation Period 10 🗘							
E	scalation Amt 10 🗘							
	Currency South African Rand	•						
Hold History	Exchange 1.00 *							
	Tax Rate 15.00 *							
Suspend History								
Processing								
Con	tract Info Customer Info Billing	Info Rental Info						
Open Windows -			4	User : 1	LudithM 09/10/2019	Version : 2.3.0.3	TEST ALPHA - JUDITH	PCLOCAL



- 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).
 - Note: If you input a non zero value, each time a call is logged against the contract location and the technician travels outside the specified *Travel Radius*, the *Travel Charge Rate* will be applied. You will not be able to close the call until the travel charges incurred are invoiced.

🗢 👻 Home Equipment a	nd Locations Cont	ract Finance			PO: Version 2.3.0.3 - TEST ALPH tenance and Projects Manufact			Service	Reporting	Utilities		_ @	x
Save Back Save Layout W	Vorkspaces												\$
0	Billing Info		q	r. D									
Enter text to search P			153		ShippingAddress	COSAccountCode	SLAHours	1	fravelRadius	TravelChargeRate	IsExtra	Status	
⁶ Functions	Billing Cycle		•	9	n B c	4 0 4	-			-	n O c	1 0 0	
E e B Notes	Billing Period	10 🗘 *			26 Lavendar , 94A Crompton St,	. 2101		8.00	0	0.00	No	A	
B NOTES	Billing Day	0 🌲		*							-		
BII	Escalation Type	Percentage	* *										
8 Documents	Escalation Period	10 🗘											
	Escalation Amt		10 🗘										
	Currency	South African Ra	and 👻 *										
Hold History	Exchange	1.00 *											
	Tax Rate	15.00 *											
Suspend History													
Processing													
Invoices													
21000CCS													
	Contract Info Cu	ustomer Info	Billing Info Rental Info				C						
Open Windows -						Licer -		10/2010	Version : 2	3.0.3 TEST ALPH			

- The *Is Extra* and *Status* fields are static.
- *Scroll left*, so that you can view the *Part Code* column again.



•				t - BPO: Version 2.3.0.3 - TES						-] [
	and Locations Contra	ract Finance and HR	Inventory M	Maintenance and Projects Ma	anufacturing Procurement	nt Sales Ser	rvice Reportin	ng Utilities		- 4	8
ve Back Save Layout V	•										
Links a	Billing Info		ų.	Drag a column header here to	group by that column						
Enter text to search P				ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status	JS
Functions	Billing Cycle	Months	• •	Y 10:	1 0 4	-	-	-	1 0 0	nDc	
	Billing Period	10 🗘 *		26 Lavendar , 94A Crompto	on St, 2101	8.	.00 00.	0.00	No	Α	<u>_</u>
Notes	Billing Day	0 🗘		*							
	Escalation Type	Percentage	+								
Documents	Escalation Period	10 🛟									
	Escalation Amt	10 🗘									
	Currency	South African Rand	•								
Hold History	Exchange	1.00									
	Tax Rate	15.00 *									
Suspend History											
Processing											
Invoices	Contract Info Cu	ustomer Info Billing Info	Rental Info								
n Windows *					User	: TudithM 09/10/	2019 Version :	2.3.0.3 TEST ALPH		HPCIO	-

• Click on the *Expand* button in the *Part Code* text box.

Process For											
Links 4	Billing Info		4	Drag a column	header here to group	by that column					
Enter text to search ۶				PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Locati
Functions	Billing Cycle	Months	- *	9 n 0 0	n D c	1 0 0	· 🛛 -	i 🖬 c	10c	*@c	n D c
	Billing Period	10 🗘 *		• 🖽						Hope Works Pretoria	First F
Notes	Billing Day	0 ‡		*							
	Escalation Type	Percentage	* *								
Documents	Escalation Period	10 🗘									
o o canona	Escalation Amt	10 🗘									
	Currency	South African Rand	÷ *								
Hold History	Currency Exchange		• *								
Hold History		1.00 *	•								
	Exchange	1.00 *	•								
Hold History Suspend History	Exchange	1.00 *	*								
	Exchange	1.00 *	*								
	Exchange	1.00 *	*								
	Exchange	1.00 *	•								
	Exchange	1.00 *	•								

The selected location *Item* frame will be expanded.

In this frame are **4** different tabs:



ITEM FEES

• These are periodic charges e.g., a monthly service fee.

ITEM METERS

• These are meter usage charges.

ITEM INCLUSIONS

• These are items included in the contract, <u>not</u> to bill.

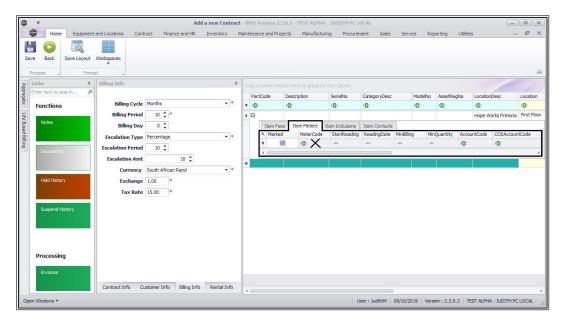
ITEM CONTACTS

- This is the contact person per location item.
- Follow the processes as set out in the <u>Create A New Contract</u> manual to add and or delete;
 - Location Item Fees
 - Location Item Inclusions
 - Location Item Contacts.

Process Formation Initis a Billing Cycle Months Notes Billing Cycle Billing Cycle Months Billing Cycle Billing Cycle Billing Cycle Billing Cycle Billing Cycle Billing Cycle Billing Cycle Billing Cycle Billing Cycle Billing Cycle<	F F Save Bad		and Locations Cont	tract Finan		a new Contract		PO: Version enance and l						Service	Rep	porting Uti	lities	- 8	x
Hold History Exchange 1.00 * Tax Rate 15.00 * Suspend History 0.00 201 Ithouse Rental 0.1/10/ * 0 0 0 0 0	-	پ t to search ۶	Billing Info	Months				PartCode	6	Description	ip by 1	SerialNo				-		Locati	ion
		ments	Billing Day Escalation Type Escalation Period Escalation Amt Currency Exchange	0 ¢ Percentage 10 ¢ South African			•	Item A Mar P F F F F F F F F F F F F	ked	FeeType AD: E L R S I I	FeeT RD: Every Loan Bank Servi Inhou	ypeDesc green Rental Rental ce use Rental	ChargeAmount = 0.00 0.00 0.00 0.00 0.00	AccountCode 1202 1200 1204 1101 1201		AccountCode	InvoiceDescription	StartDa	20 19 20 19 20 19 20 19 20 19 20 19
Invoices Contract Info Customer Info Billing Info Rental Info	Proces	essing	Contract Info Ci	ustomer Info	Biling Info	Rental Info		4			1130								•



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

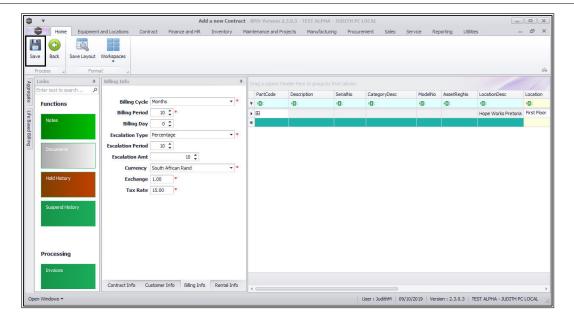


- You can continue to add contract location items as required, however additional items can also be added later.
- You can also delete contract location items if required.

SAVE LOCATION CONTRACT

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





- The new contract will be *saved* and you will return to the *Contract Listing* screen where the status will default to *Active*.
- Click on the drop-down *arrow* in the *Status* field and select the *New* status.

Add Edit Delete		Ind Locations Cor Save Layout Workspaces • Save Filter	Itract Fina	Release For Approval	Close Contract	Pretoria Active Status	* M StatusDesc	Find Serial No.	nent Sales Service	3		
Processing	1	Format	4	Status Processing	4	R	New Released		Print a Repo			
nks # ter text to search P						A H	Active Hold					
	Contra			CustomerName	CustomerDe	x	Deleted Closed	L	Desc	Location	OrderNo	StartDate
Functions	₽ # 	RBC	R	0:	a 🗖 c	P	Suspend		-	8 0 0	e 🗖 c	-
	+ CO000	0233 HOP001	н	lope Works	Sales Depar	x			0	Durban Area		18/10/201
Notes	C0000	0240 HOP001	н	lope Works	Sales Depar	tment	CPC	Cost Per Cop	y	Durban Area		01/06/201
	CO000	0241 HOP001	н	lope Works	Sales Depar	tment	CPC	Cost Per Cop	у	Gilits		01/06/201
	C0000	0244 QUA001	9	Quality Printers			CPC	Cost Per Cop	у	Gillits		01/06/201
	C0000	0245 QUA001	9	Quality Printers			CPC	Cost Per Cop	у	Gilits		01/06/201
	CO000	0247 THR001	П	he Real			CPC	Cost Per Cop	у	Gilits		01/06/2019
	CO000	0248 PAM001	P	am Holdings			CPC	Cost Per Cop	у	Durban Area		01/06/2019
Hold History												
Suspend History												

• The new contract can be found within the *New* contract status listing screen.



• From here the contract will need to be **Released** and **Approved** before it becomes active.

Home E	Equipment and	ocations Contrac	t F	Finance and HR	Inventory Maintenance a	and Projects	Manufacturing Procu	rement	Sales S	Service	Reporting	Utilities	- 1	æ
dd Edit Delete	View	Workspaces 🔻	唱 Ho 簡 Su 隐 Re	ispend 🚜 Remove	e For Approval e From Approval e Contract	Pretoria New	Find Serial N		Export	Reports				
Processing		Format "		Status Pro	cessing a		Current	a Pr	int "	Repo				
nks #														
ter text to search P	ContractN	CustomerCo	de	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	Order	No	StartDate	EndDate	DepartmentName	e
unctions	₽ a∎c	e@c		a n c	8 0 0	a 🗖 c	a 🗖 c	R D C	e l ic		-	· · · · ·	8 0 0	
Notes	MTC00000	14 HOP001		Hope Works	Sales Department	MTC	Maintenace Contract	Pretoria 1			01/10/2019	01/10/2024	Sales Departmen	nt
Documents Hold History Suspend History														

MNU.112.050