

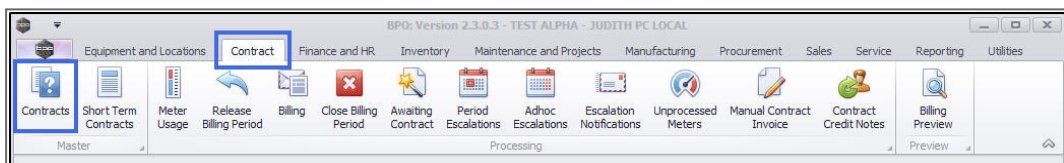
CONTRACTS

ADD NEW LOCATION CONTRACT (POST V2.3.0.0)

A [Customer Location](#) is required for a Customer Location Contract.

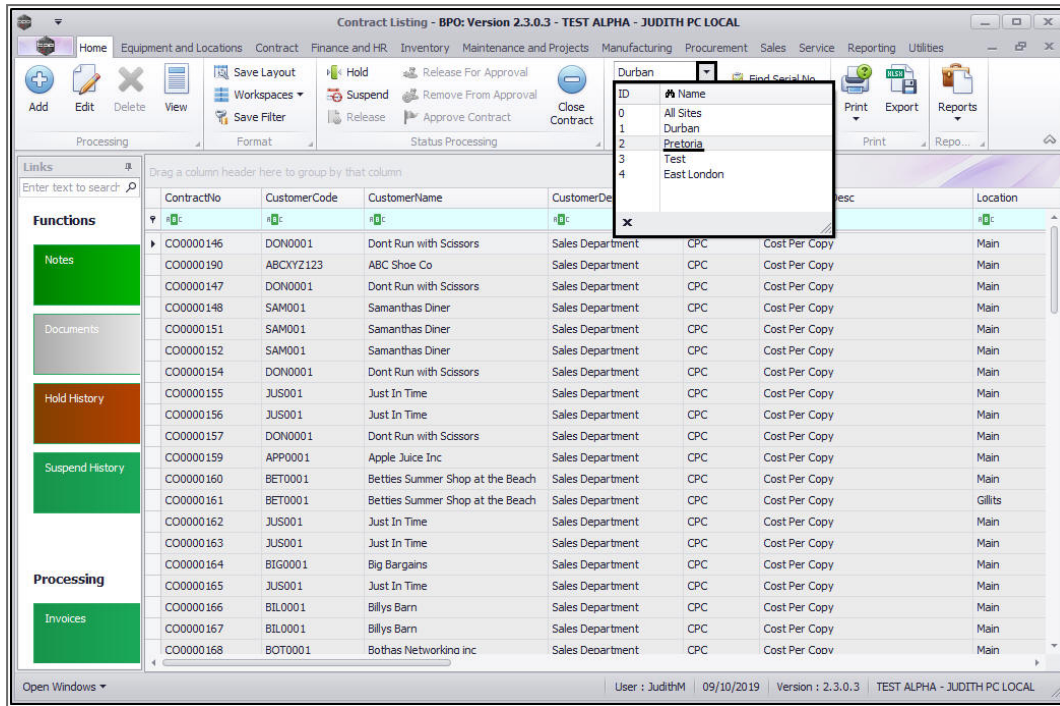
The location item that is being added to the contract is a defined customer location.

Ribbon Access: *Contract > Contracts*

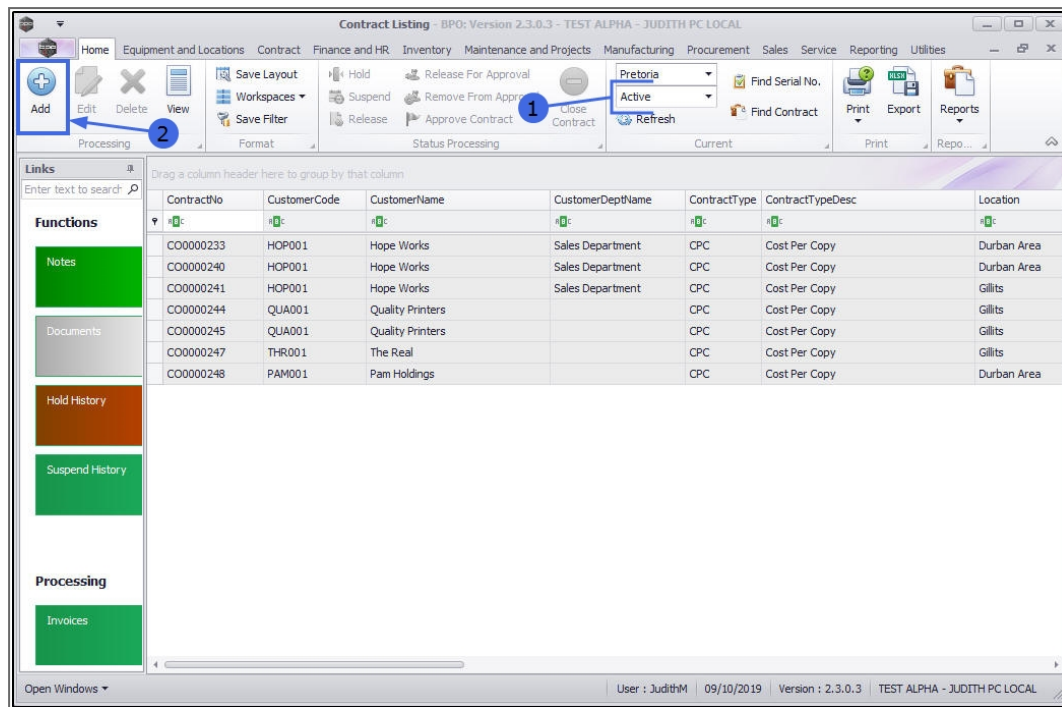


The **Contract Listing** screen will be displayed.

- Select the **site** that you wish to work in.
 - In this image **Pretoria** has been selected.



1. 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**.

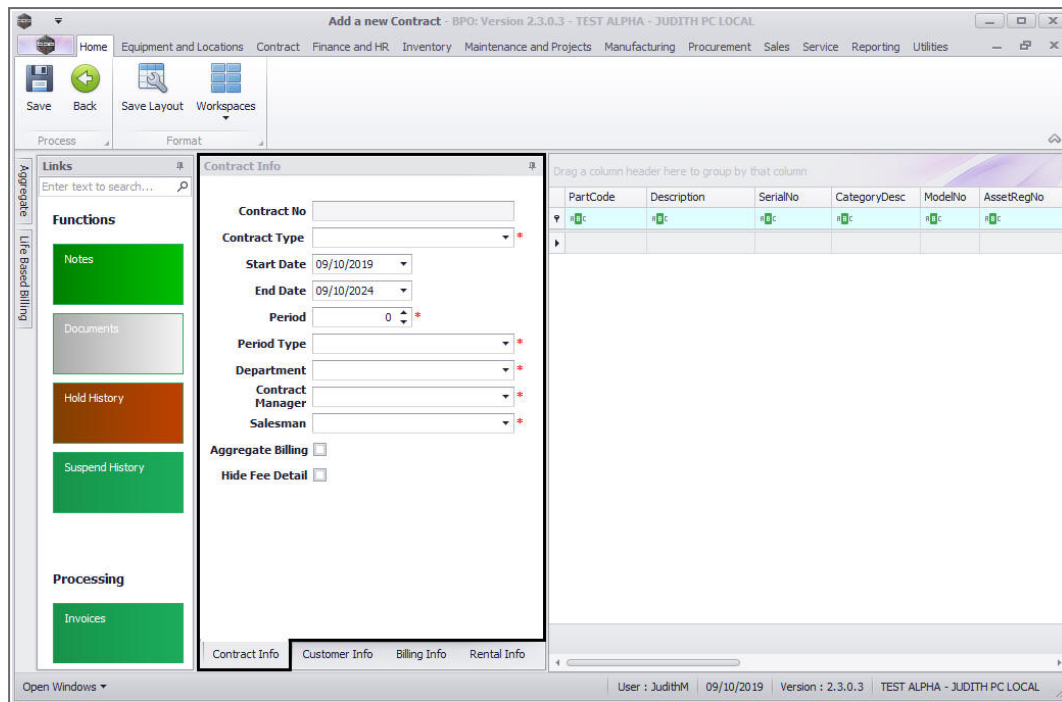


- The **Add a new Contract** screen will be displayed.

CONTRACT INFO PANEL

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

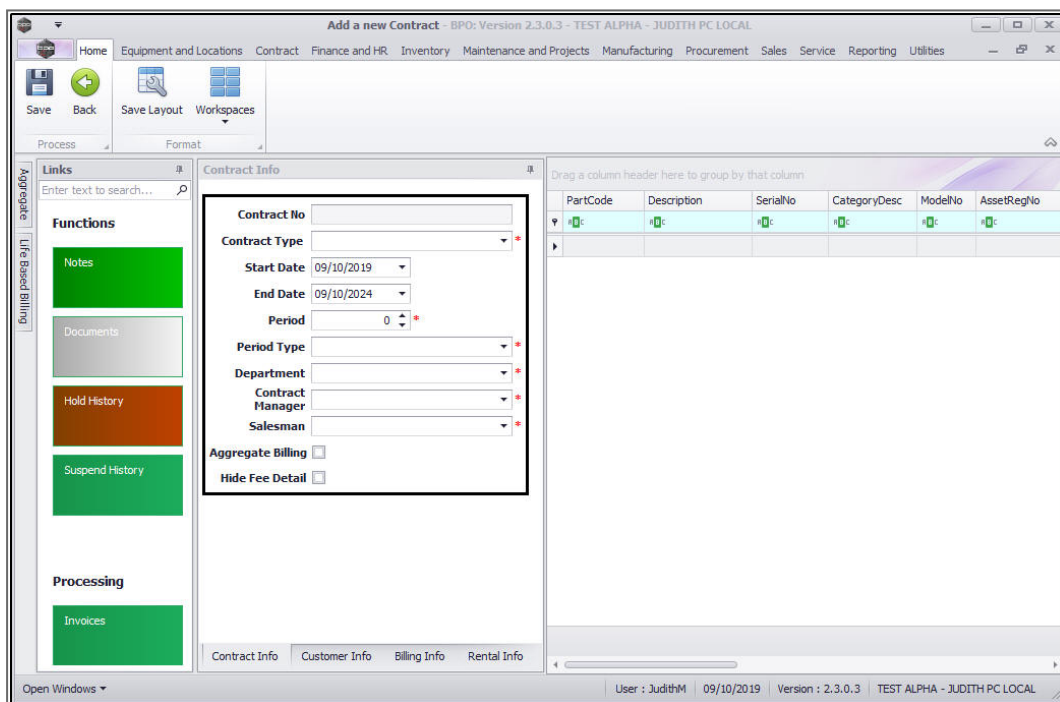
- If not, click on the **Contract Info** tab.
- The **Contract Info panel** will move to the fore.



Contract Info Panel Details

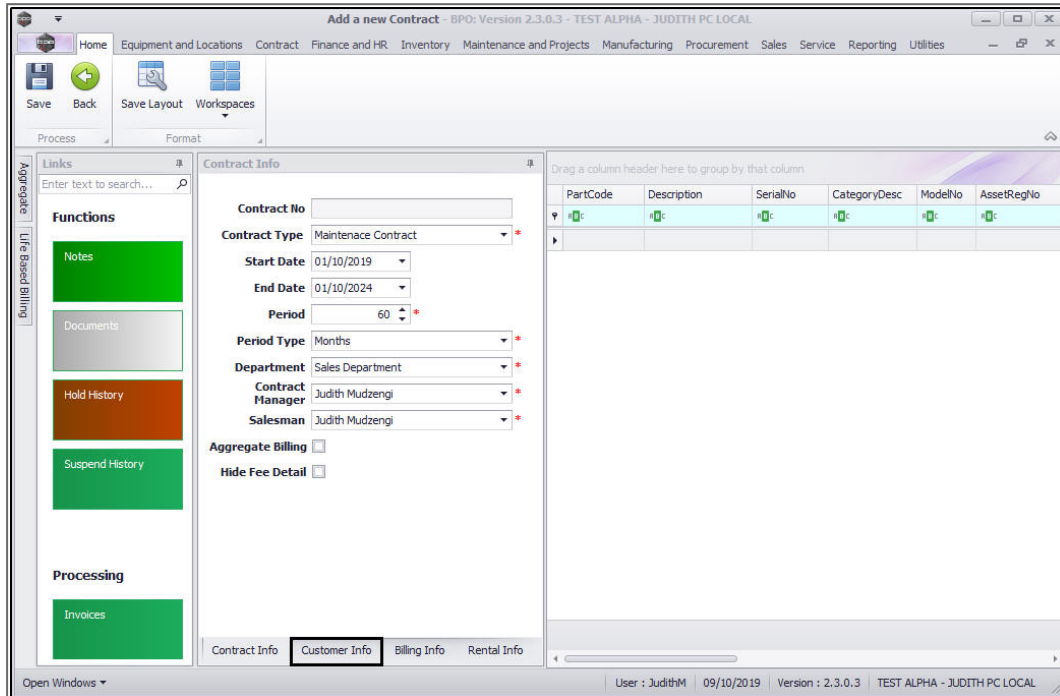
- **Contract No:** The contract number is generated by the system (if the **Auto Contract flag** is selected in **BPO Configurator**).
- **Contract Type:** Click on the drop-down arrow and select the **Contract Type** e.g., Cost per Copy.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an 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.
 - **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.

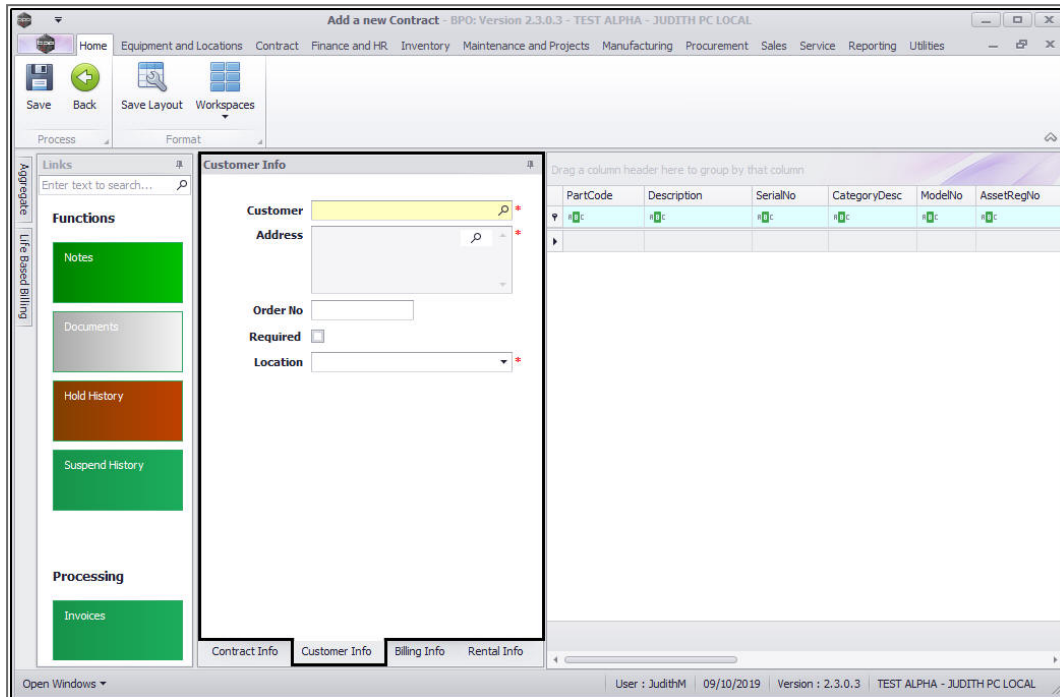


The **Customer Info** panel will move to the fore.

Customer Info Panel Details

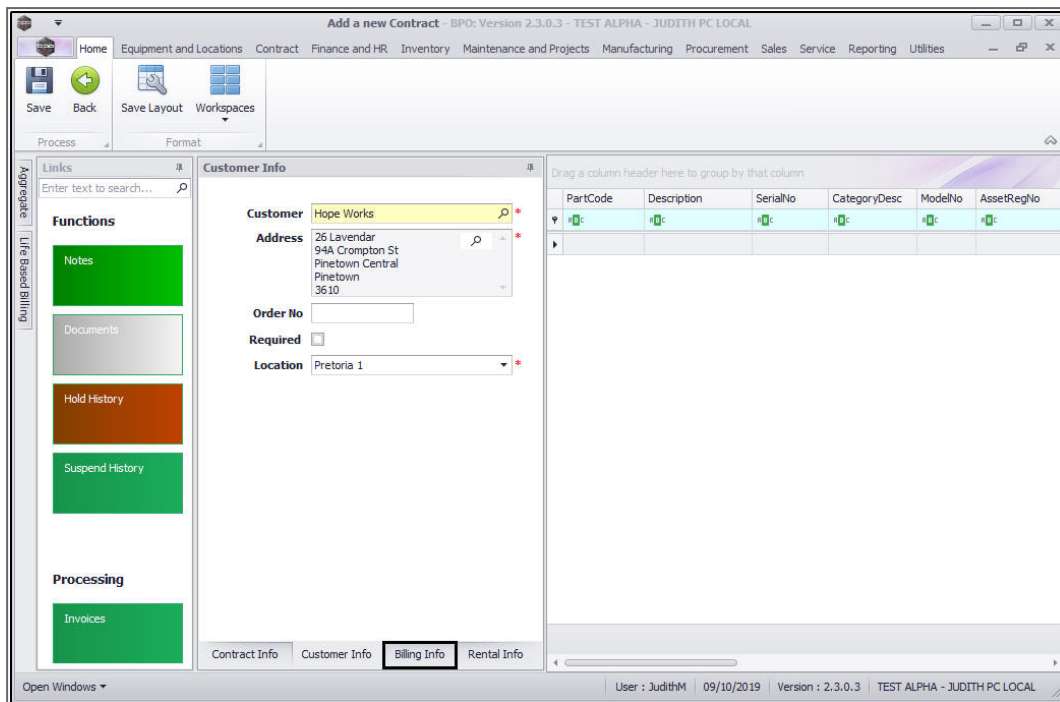
- Customer:** Click on the search button and select the customer from the **Select a customer for this contract** pop up screen.
- Address:** This will autopopulate but you can click on the search button and select the address from the **Select an address for this contract** pop up screen.
- Order No:** Type in the customer order number if required.
- Required:** Only select this check box if the client 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.



BILLING INFO PANEL

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



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

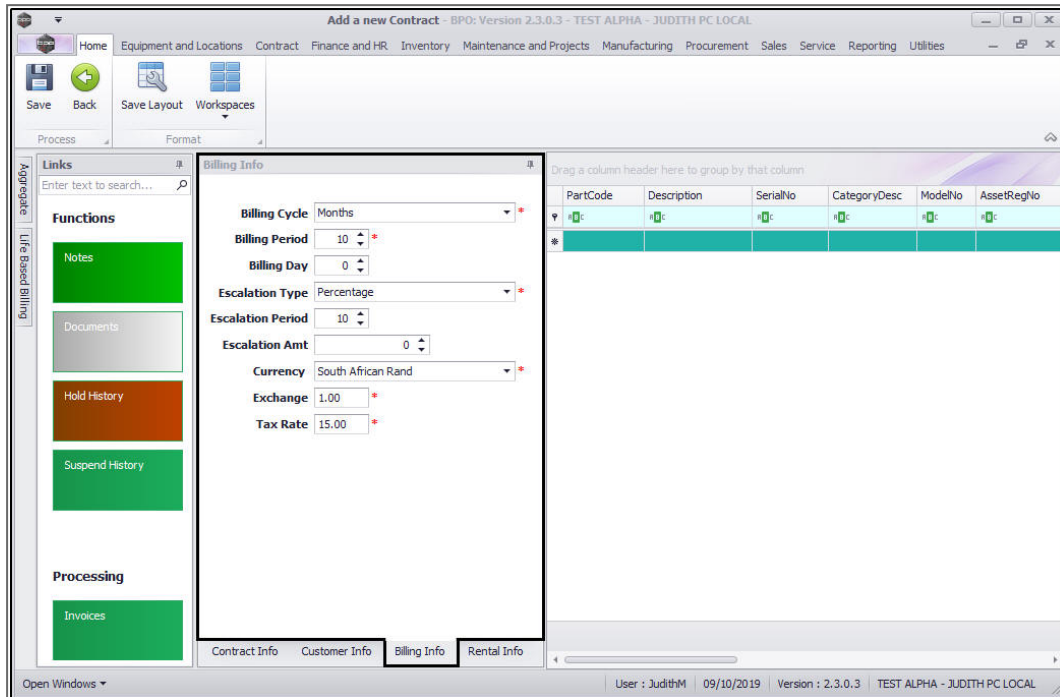
- **Note:** Some of these details will auto populate but they can be changed as explained below.

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.



The screenshot shows the 'Add a new Contract' window with the 'Billing Info' panel selected. The panel contains the following fields:

- Billing Cycle:** Months
- Billing Period:** 10
- Billing Day:** 0
- Escalation Type:** Percentage
- Escalation Period:** 10
- Escalation Amt:** 0
- Currency:** South African Rand
- Exchange:** 1.00
- Tax Rate:** 15.00

On the right side of the panel, there is a table with the following columns: PartCode, Description, SerialNo, CategoryDesc, ModelNo, and AssetRegNo. The table is currently empty.

RENTAL INFO PANEL

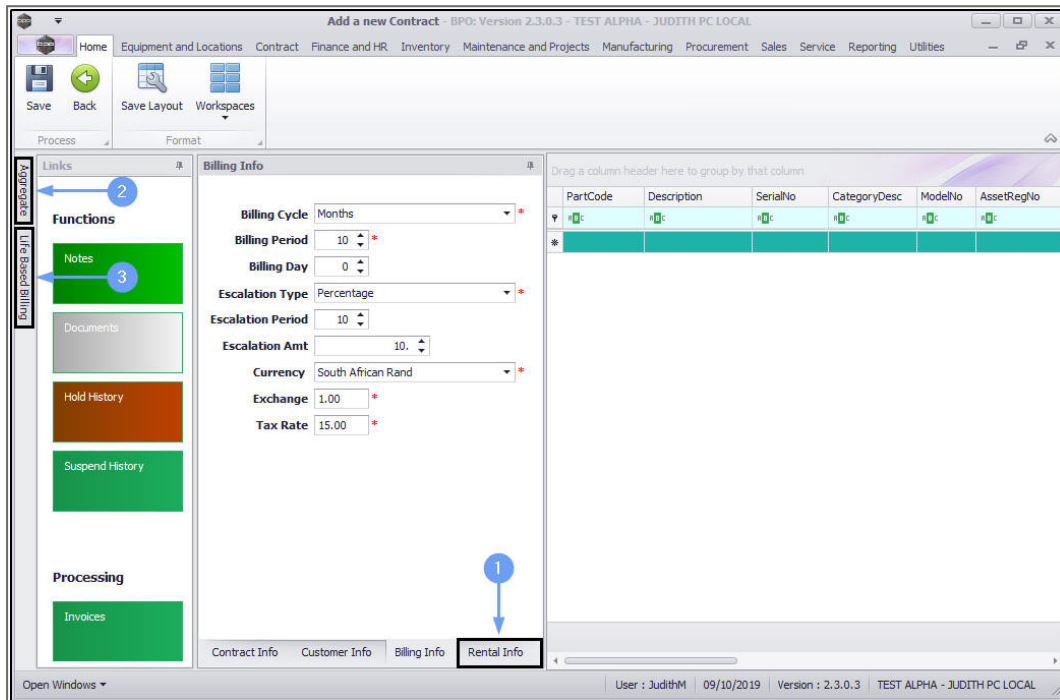
1. This used for a third party **rental** contract.
 - For more information please refer to Rental Contract.

AGGREGATE PANEL

2. This is used when creating an Aggregate contract or Prepaid / Life Based contract.
 - For more information, refer to **Aggregate contract** and **Pre-paid / 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 a new Contract - BPO: Version 2.3.0.3 - TEST ALPHA - JUDITH PC LOCAL

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

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Billing Info

Billing Cycle: Months

Billing Period: 10

Billing Day: 0

Escalation Type: Percentage

Escalation Period: 10

Escalation Amt: 10

Currency: South African Rand

Exchange: 1.00

Tax Rate: 15.00

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

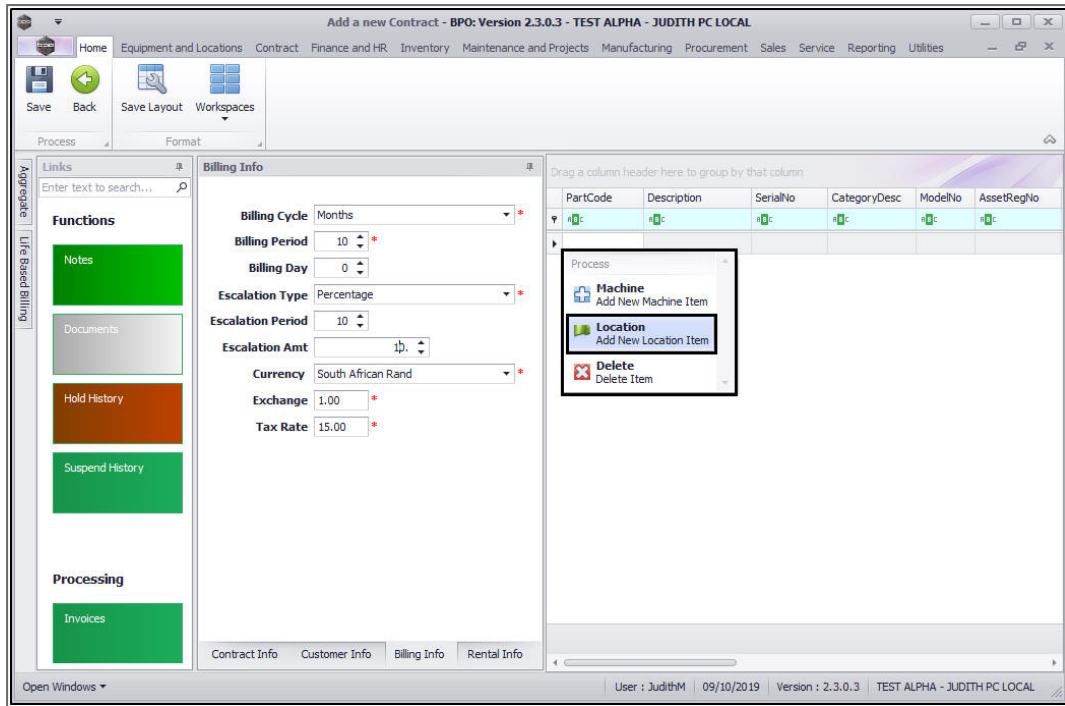
Drag a column header here to group by that column

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo
*					

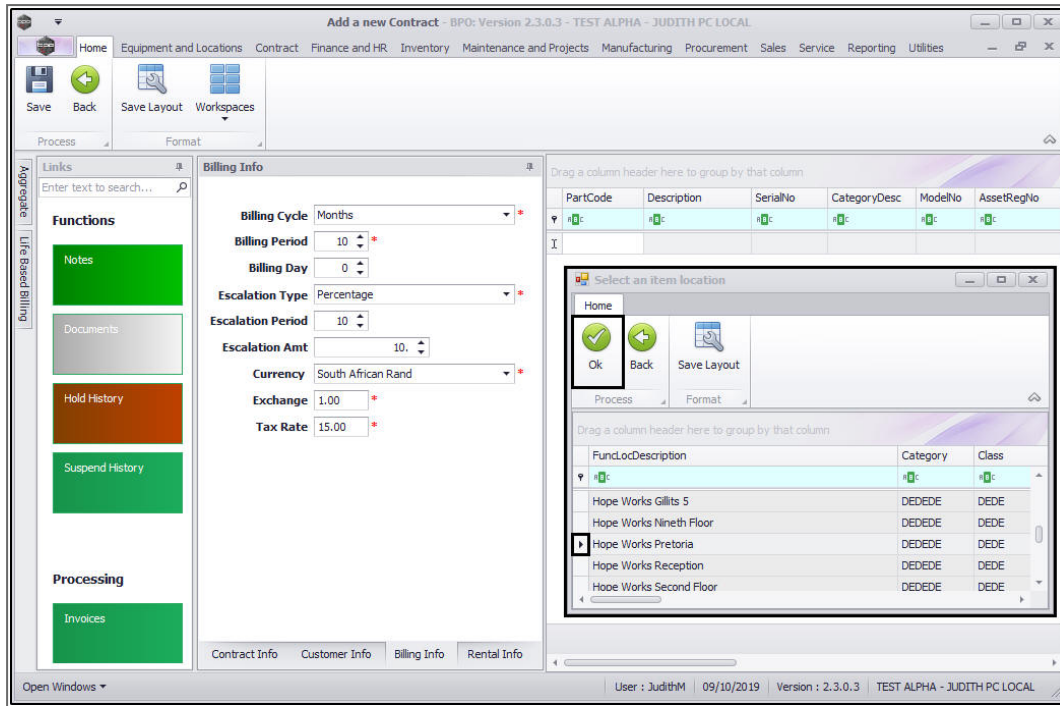
User: JudithM | 09/10/2019 | Version: 2.3.0.3 | TEST ALPHA - JUDITH PC LOCAL

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.



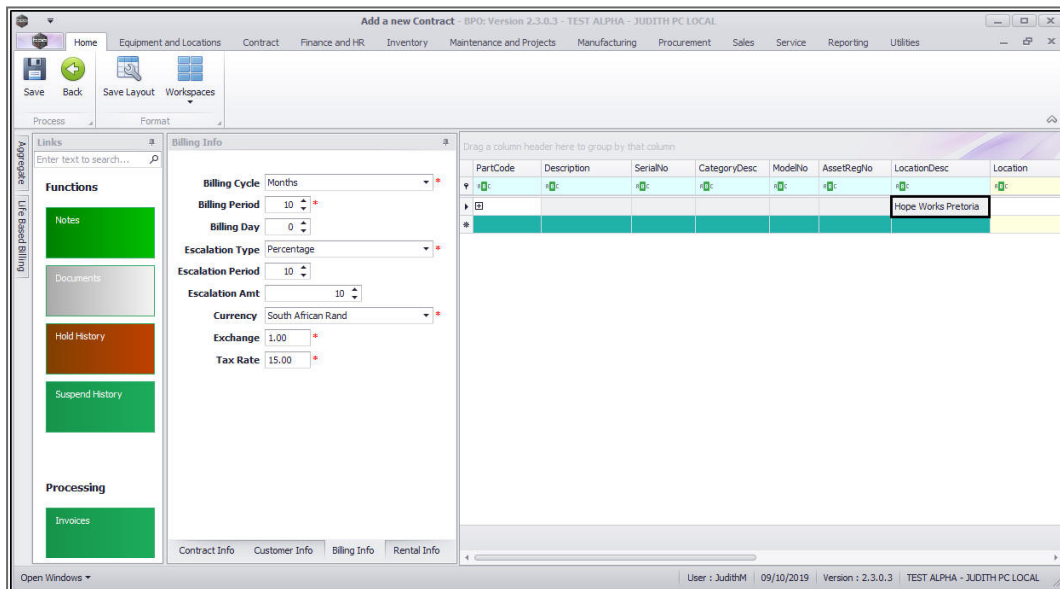
- The **Select an item location** pop up screen will appear.
- Select the **row** of the **item location description** that you wish to **add**.
- Click on **Ok**.



The screenshot shows the 'Add a new Contract' window with the 'Billing Info' tab selected. The 'Billing Info' section includes fields for Billing Cycle (Months), Billing Period (10), Billing Day (0), Escalation Type (Percentage), Escalation Period (10), Escalation Amt (10), Currency (South African Rand), Exchange (1.00), and Tax Rate (15.00). A 'Select an item location' dialog box is open, displaying a table of locations:

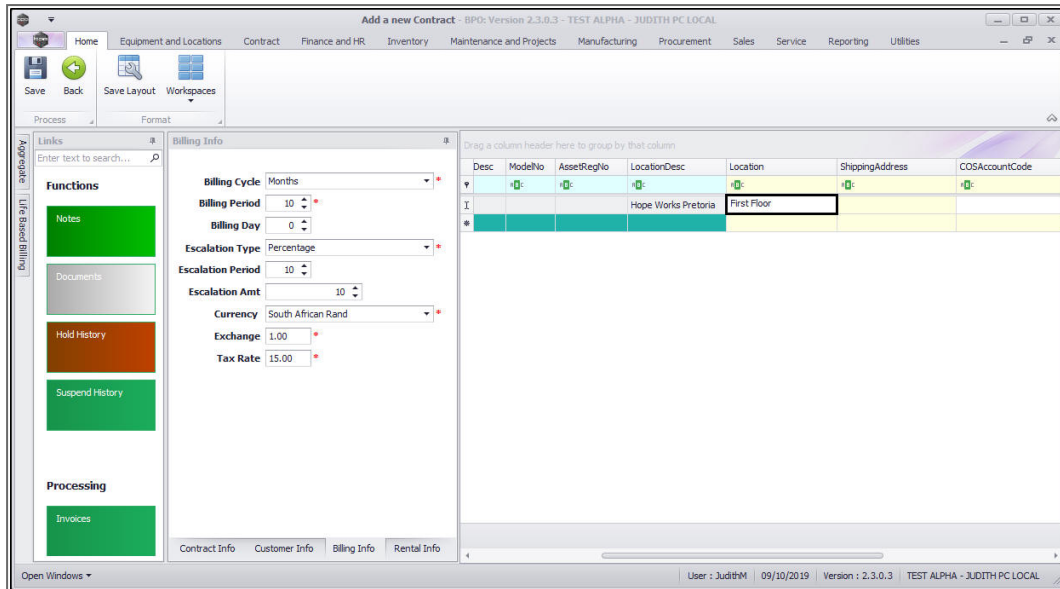
FuncLocDescription	Category	Class
Hope Works Gillits 5	DEDEDE	DEDE
Hope Works Nineth Floor	DEDEDE	DEDE
Hope Works Pretoria	DEDEDE	DEDE
Hope Works Reception	DEDEDE	DEDE
Hope Works Second Floor	DEDEDE	DEDE

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



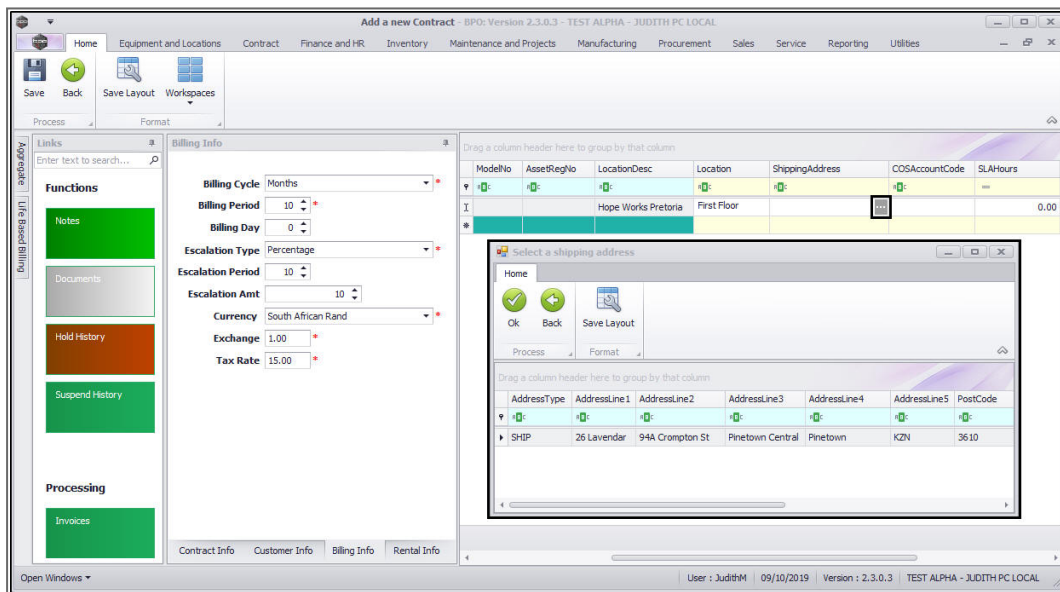
The screenshot shows the 'Add a new Contract' window with the 'Billing Info' tab selected. The 'Billing Info' section includes fields for Billing Cycle (Months), Billing Period (10), Billing Day (0), Escalation Type (Percentage), Escalation Period (10), Escalation Amt (10), Currency (South African Rand), Exchange (1.00), and Tax Rate (15.00). The 'Location Description' field is now populated with 'Hope Works Pretoria'.

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



Contract Info Customer Info Billing Info Rental Info

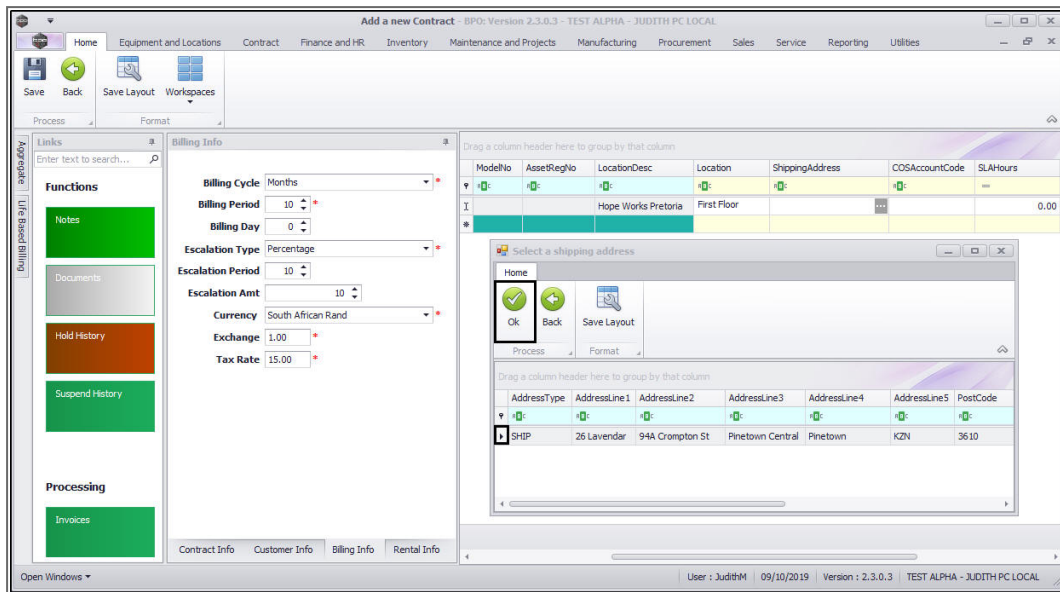
- Click in the **Shipping Address** text box.
- An **ellipsis** button will be revealed.
- Click on this button to display the **Select a shipping address** pop up screen.



Contract Info Customer Info Billing Info Rental Info

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

- Click on **Ok**.

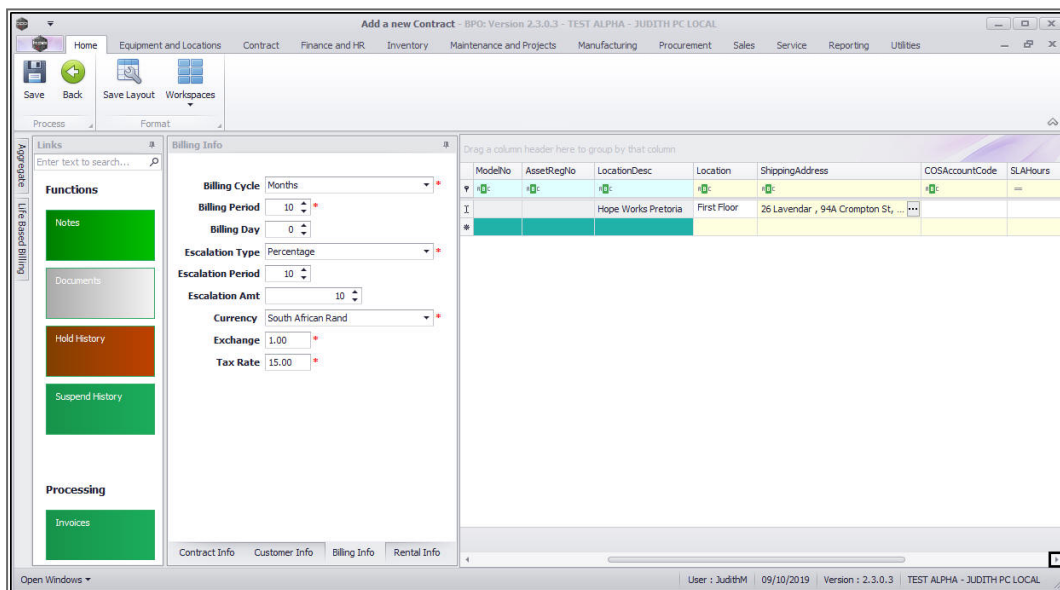


The screenshot shows the 'Add a new Contract' window with the 'Billing Info' tab selected. A 'Select a shipping address' dialog is open, displaying a table of shipping addresses. The dialog has 'Ok', 'Back', and 'Save Layout' buttons. The main window also shows various fields for Billing Cycle, Billing Period, Billing Day, Escalation Type, Escalation Period, Escalation Amt, Currency, Exchange, and Tax Rate.

ModelNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours
		Hope Works Pretoria	First Floor			0.00

AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode
SHIP	26 Lavendar	94A Crompton St	Pinetown Central	Pinetown	KZN	3610

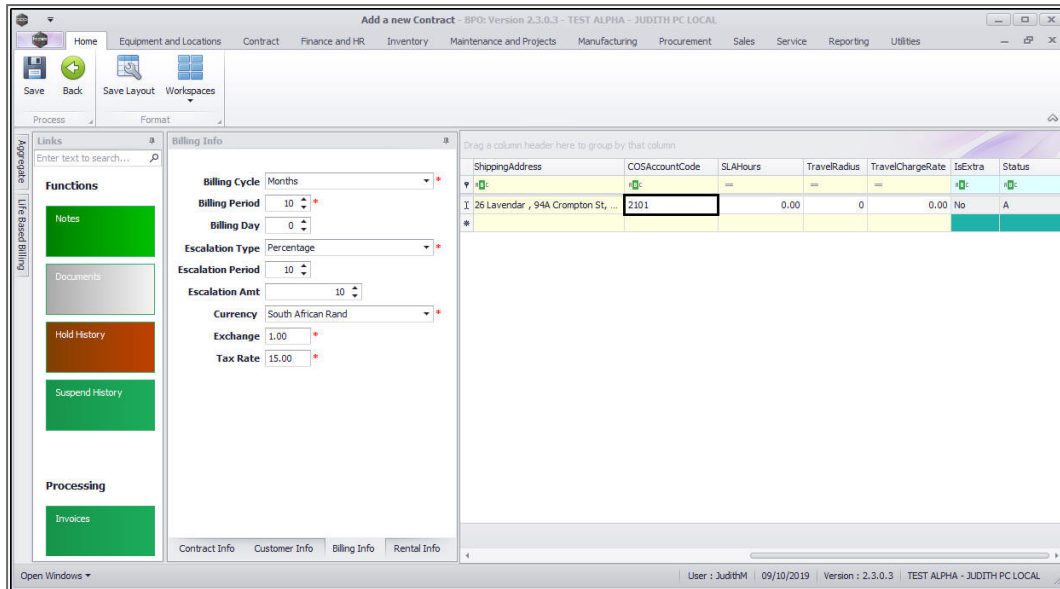
- **Scroll right** to view the remaining columns in the **Items** frame.



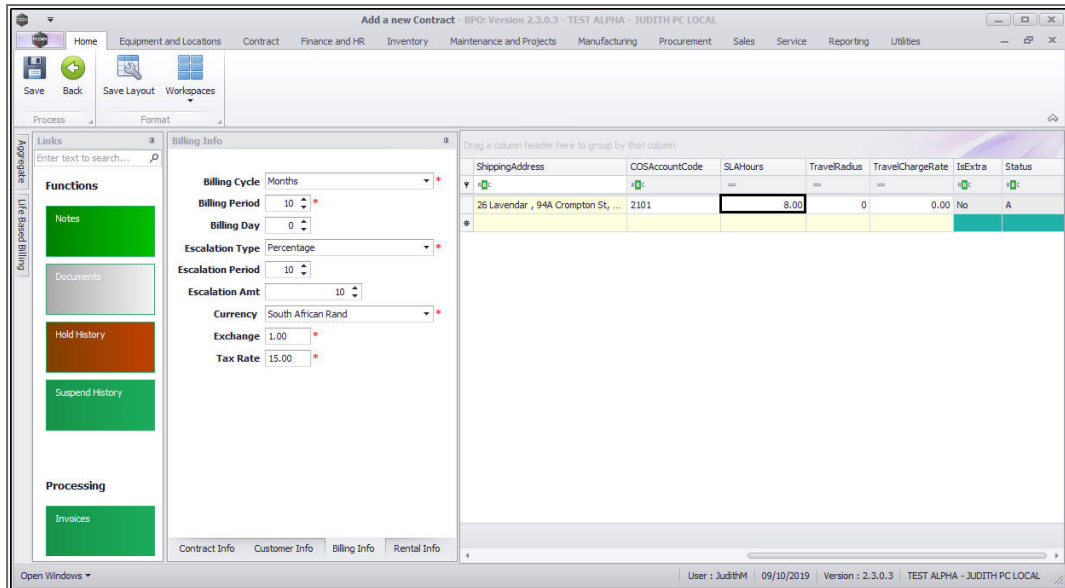
The screenshot shows the 'Add a new Contract' window with the 'Billing Info' tab selected. The 'Items' frame is scrolled to the right, showing the 'COS Account Code' text box. The dialog is no longer visible. The main window shows the same fields as the previous screenshot.

ModelNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours
		Hope Works Pretoria	First Floor	26 Lavendar , 94A Crompton St, ...		

- 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**.

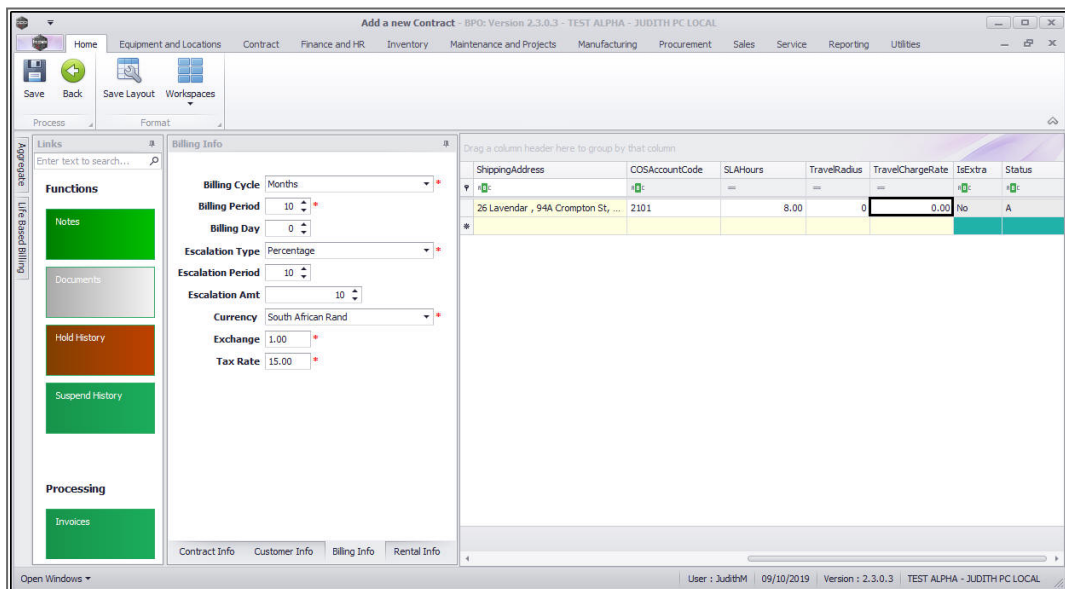


Billing Info

Billing Cycle: Months
 Billing Period: 10
 Billing Day: 0
 Escalation Type: Percentage
 Escalation Period: 10
 Escalation Amt: 10
 Currency: South African Rand
 Exchange: 1.00
 Tax Rate: 15.00

ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
26 Lavendar, 94A Crompton St...	2101	8.00	0	0.00	No	A

- 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.

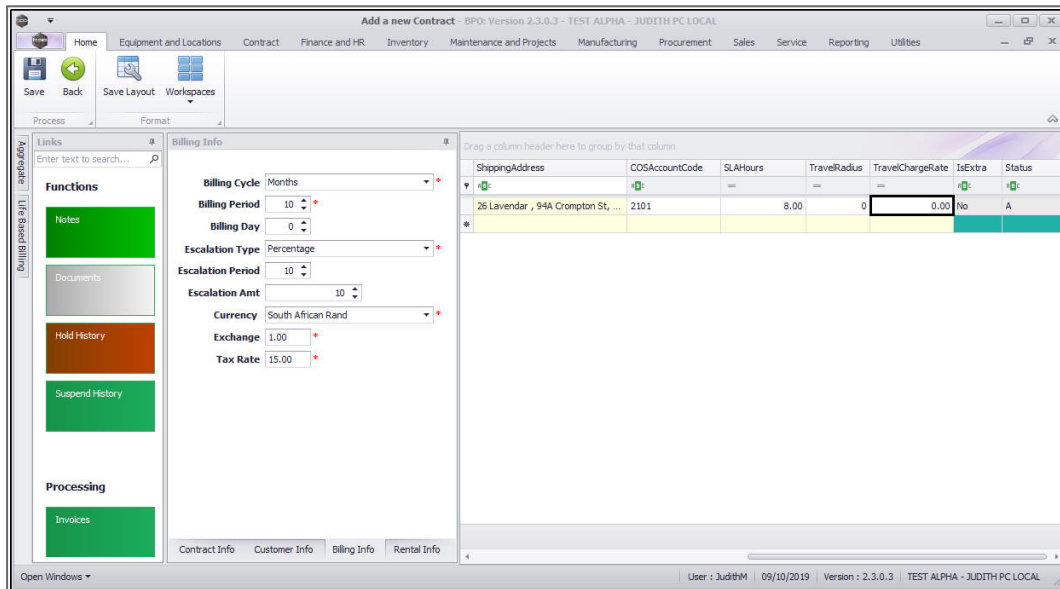


Billing Info

Billing Cycle: Months
 Billing Period: 10
 Billing Day: 0
 Escalation Type: Percentage
 Escalation Period: 10
 Escalation Amt: 10
 Currency: South African Rand
 Exchange: 1.00
 Tax Rate: 15.00

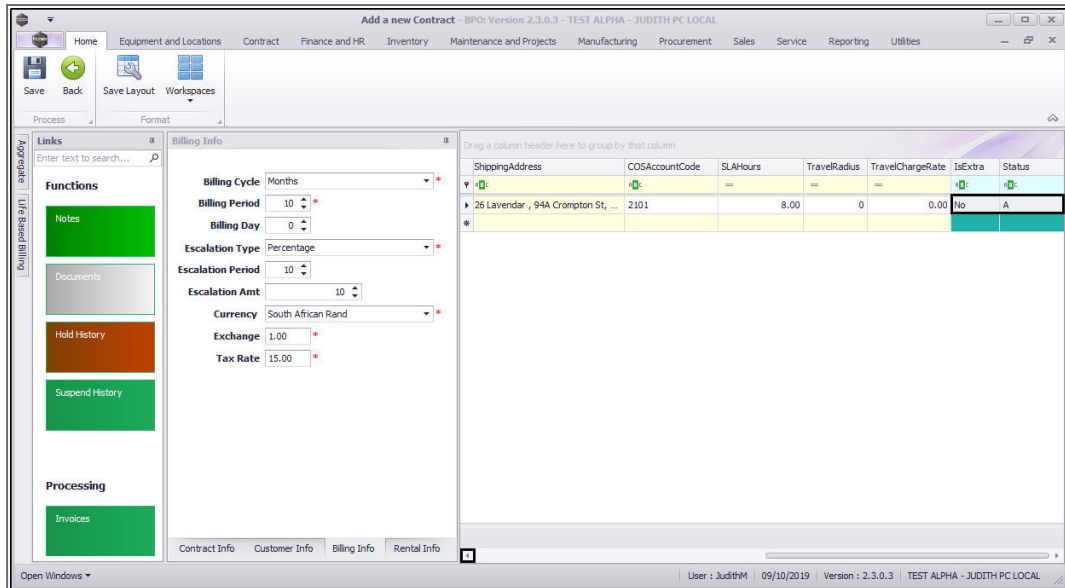
ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
26 Lavendar, 94A Crompton St...	2101	8.00	0	0.00	No	A

- 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.

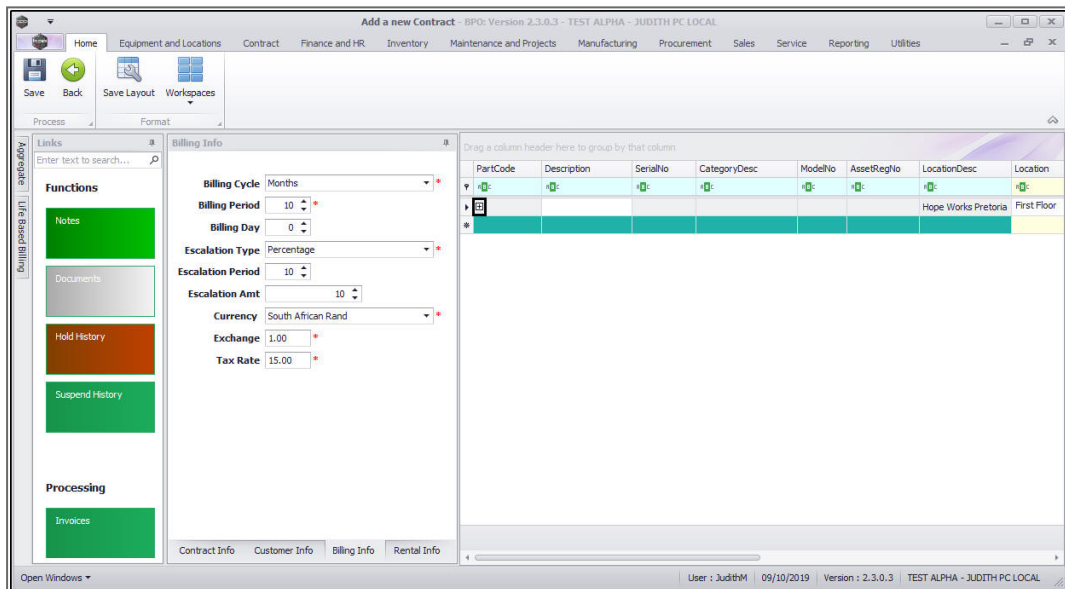


ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
26 Lavendar, 94A Crompton St, ...	2101	8.00	0	0.00	No	A

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



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



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, not to bill.

ITEM CONTACTS

- This is the contact person - per location item.
- Follow the processes as set out in the [Create A New Contract](#) manual to add and or delete;
 - [Location Item Fees](#)
 - [Location Item Inclusions](#)
 - [Location Item Contacts](#).

Add a new Contract - BPO: Version 2.3.0.3 - TEST ALPHA - JUDITH PC LOCAL

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

Enter text to search...

Functions

- Notes
- Documents
- Hold History
- Suspend History

Processing

- Invoices

Billing Info

Billing Cycle: Months

Billing Period: 10

Billing Day: 0

Escalation Type: Percentage

Escalation Period: 10

Escalation Amt: 10

Currency: South African Rand

Exchange: 1.00

Tax Rate: 15.00

Drag a column header here to group by that column

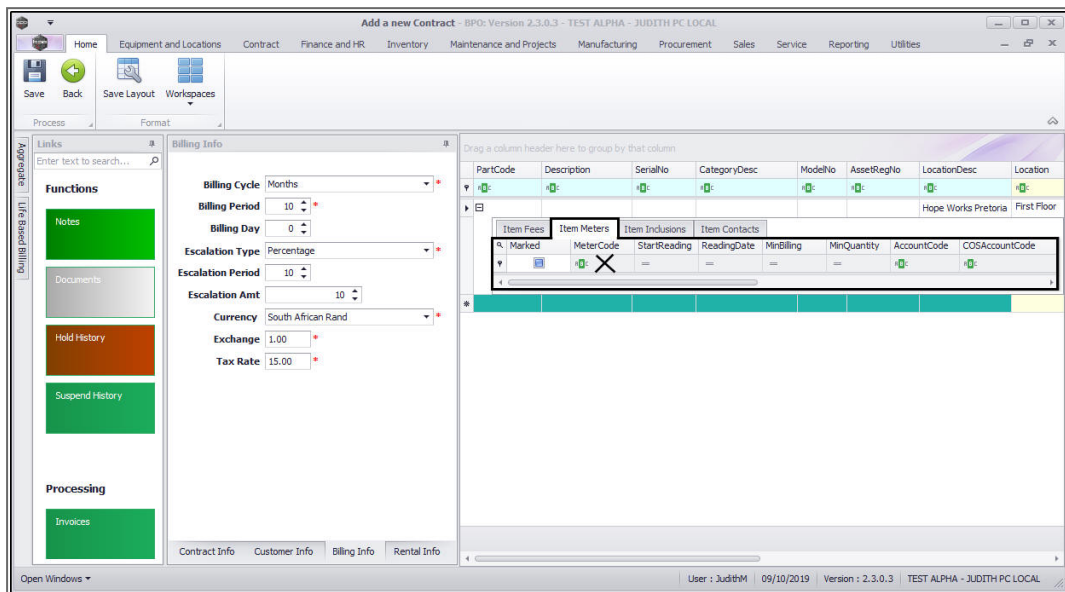
PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
						Hope Works Pretoria	First Floor

Item Fees	Item Meters	Item Inclusions	Item Contracts
Marked	FeeType	FeeTypeDesc	ChargeAmount
	E	Evergreen Rental	0.00
	L	Loan	0.00
	R	Bank Rental	0.00
	S	Service	0.00
	I	Inhouse Rental	0.00
	N	Insurance	0.00
			0.00

Contract Info Customer Info Billing Info Rental Info

User: JudithM 09/10/2019 Version: 2.3.0.3 TEST ALPHA - JUDITH PC LOCAL

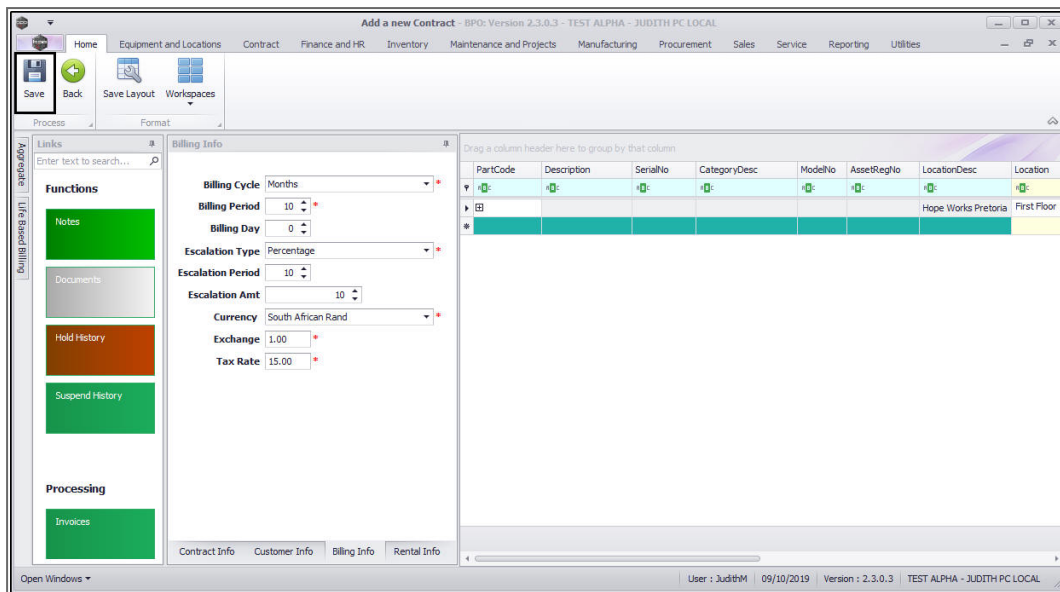
- **Note:** In the *Item* Frame, you will not be able to add *Item Meters* as this is a Location Contract not a Machine Contract and you cannot link meters to a location.



- 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**.



Add a new Contract BPO: Version 2.3.0.3 - TEST ALPHA - JUDITH PC LOCAL

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 Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Billing Info

Billing Cycle: Months

Billing Period: 10

Billing Day: 0

Escalation Type: Percentage

Escalation Period: 10

Escalation Amt: 10

Currency: South African Rand

Exchange: 1.00

Tax Rate: 15.00

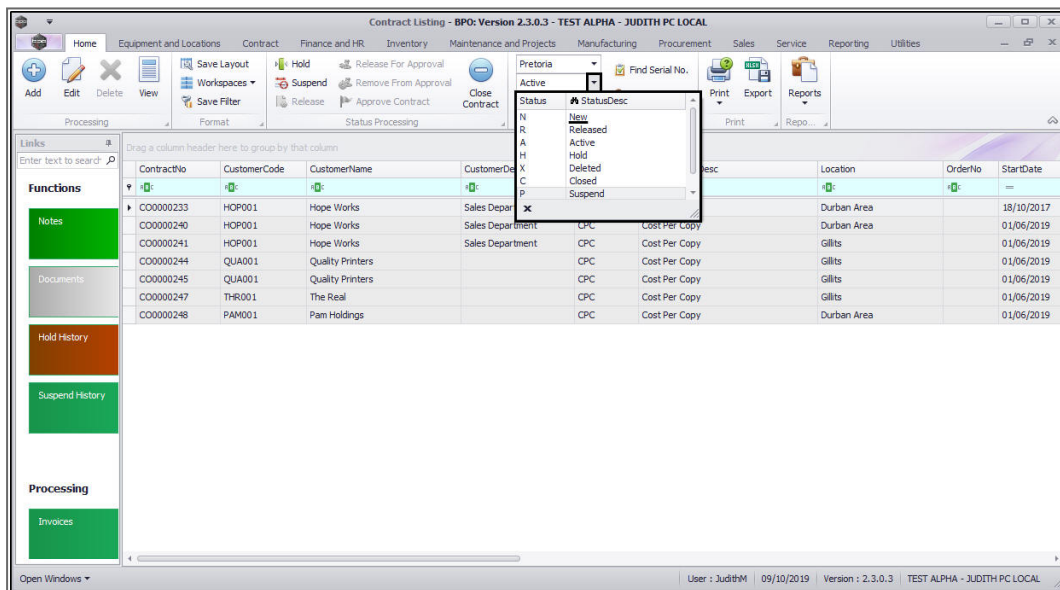
Contract Info Customer Info Billing Info Rental Info

Open Windows

User: JudithM 09/10/2019 Version: 2.3.0.3 TEST ALPHA - JUDITH PC LOCAL

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
						Hope Works Pretoria	First Floor

- 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.



Contract Listing - BPO: Version 2.3.0.3 - TEST ALPHA - JUDITH PC LOCAL

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 From Approval Release Approve Contract

Status Processing

Close Contract

Pretoria Find Serial No.

Print Export Reports

Print Repo...

Links Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Drag a column header here to group by that column

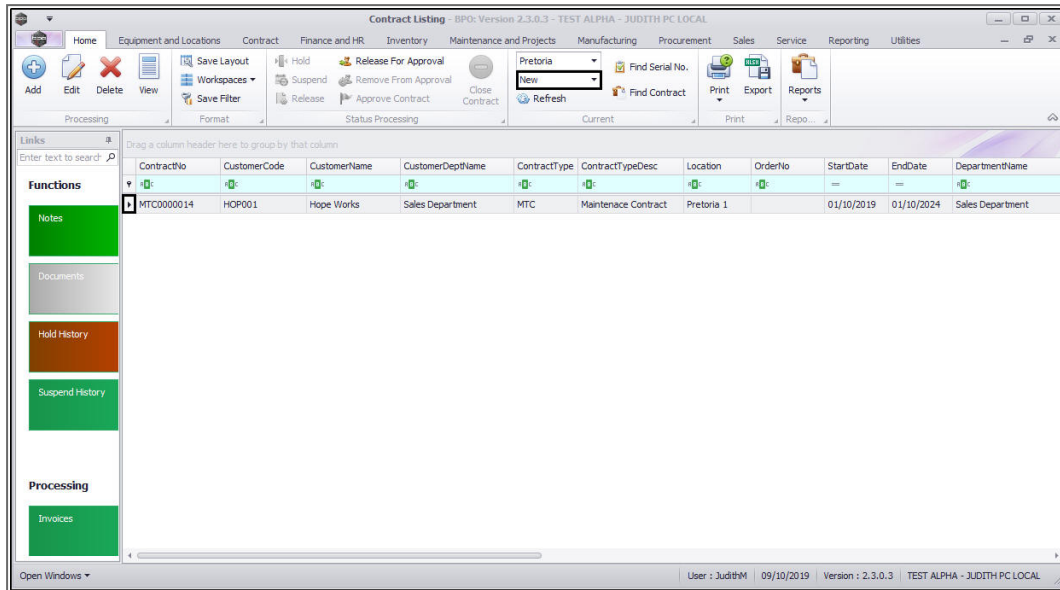
ContractNo	CustomerCode	CustomerName	CustomerDe	Location	OrderNo	StartDate
CO0000233	HOP001	Hope Works	Sales Depart	Durban Area		18/10/2017
CO0000240	HOP001	Hope Works	Sales Department	Durban Area		01/06/2019
CO0000241	HOP001	Hope Works	Sales Department	Gilts		01/06/2019
CO0000244	QUA001	Quality Printers		Gilts		01/06/2019
CO0000245	QUA001	Quality Printers		Gilts		01/06/2019
CO0000247	THR001	The Real		Gilts		01/06/2019
CO0000248	PAM001	Pam Holdings		Durban Area		01/06/2019

Open Windows

User: JudithM 09/10/2019 Version: 2.3.0.3 TEST ALPHA - JUDITH PC LOCAL

- 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.



MNU.112.050

