

CONTRACT

AGGREGATE BILLING (PRE V2.3.0.0)

BPO2 now accommodates **aggregate billing**.

Where the previous aggregate billing work-around was used, with **Aggregate Meter Definitions**, these contracts should now be reviewed and configured as described in the manual below.

Contracts cannot be configured for **aggregate billing** where the customer is **consolidated**.

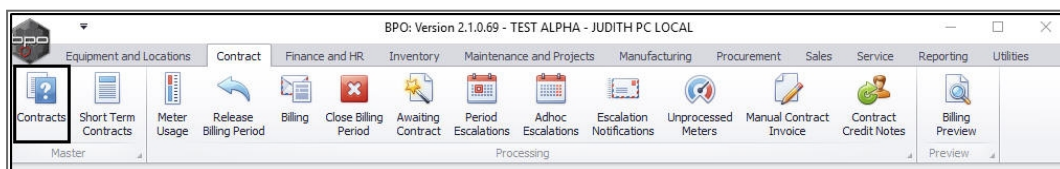
Fees - contract **item fees** are still charged / calculated separately.

Meters

- Meter min (minimum) billing is global per meter **type**.
- Each meter type should be configured with the same cost per copy charges on each machine on the contract.
- An aggregate billing contract only supports a single billing customer on meters.

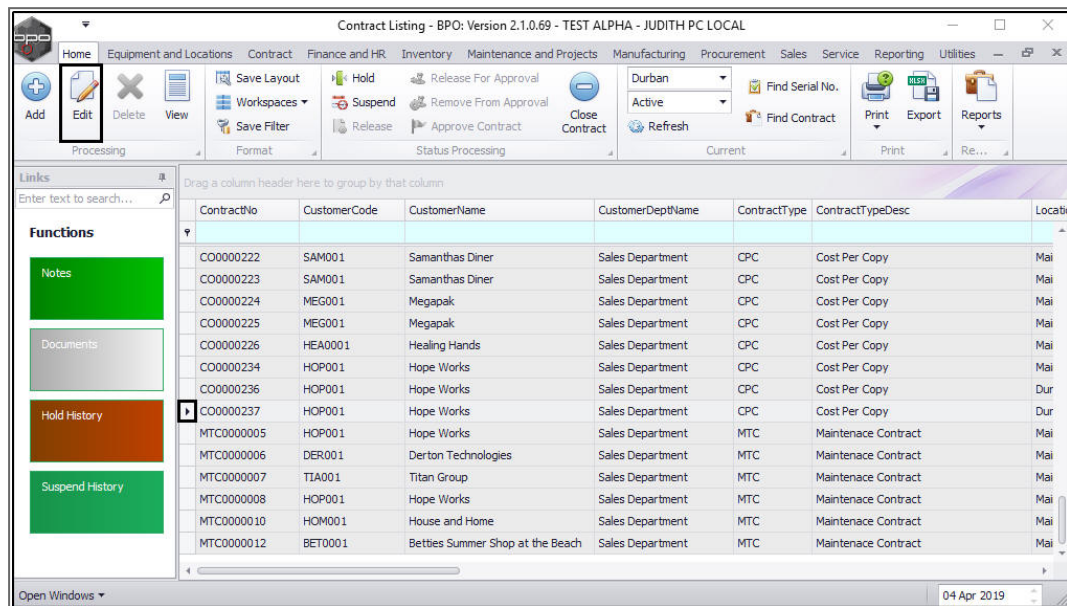
The Aggregate Billing flag can be found in the **Contract Info** panel in the **Add New Contract** screen (when creating a new contract) or the **Maintenance for Contract No.: []** screen (when editing an existing contract).

Ribbon Access: *Contract > Contracts*



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

- Click on the **row selector** in front of the contract you wish to view.
- Click on **Edit**.



The **Maintenance for Contract No. : []** screen will be displayed.

THE AGGREGATE BILLING FLAG

- Click on the **Contract Info** tab and check whether the **Aggregate Billing** flag is selected.

Maintenance for Contract No.: CO0000237 - Status: A - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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Save Back Save Layout Workspaces

Process Format

Links Enter text to search...

Functions

- Notes
- Documents
- Hold History
- Suspend History

Contract Info

Contract No: CO0000237

Contract Type: Cost Per Copy *

Start Date: 01 Jan 2019

End Date: 01 Jan 2024

Period: 60 *

Period Type: Months *

Department: Sales Department *

Contract Manager: Judith Mudzengi *

Salesman: Judith Mudzengi *

Aggregate Billing: ☒ *

Hide Fee Detail: ☐

Contract Info Customer Info Billing Info

Open Windows

04 Apr 2019

Drag a column header here to group by that column

PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
SP 2020...	SP 2020 Sprint MFC	2020-00018			Reception
SP 2020...	SP 2020 Sprint MFC	2020-00019			Reception
SP 2020...	SP 2020 Sprint MFC	2020-2314R			Reception

Note: If the Aggregate Billing flag is not selected, select it and click on **Save**.

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SP 2020...	SP 2020 Sprint MFC	2020-00019			Reception
SP 2020...	SP 2020 Sprint MFC	2020-2314R			Reception

THE ITEMS FRAME

In the *Maintenance for Contract No.: []* screen,

- Click on the **expand** button in the row of a **Part Code** linked to the contract.

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Period Type Months

Department Sales Department

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Contract Info Customer Info Billing Info

Open Windows

04 Apr 2019

PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
SP2020MFC	SP2020 Sprint MFC	2020-00018			Recepti
SP2020MFC	SP2020 Sprint MFC	2020-00019			Recepti
SP2020MFC	SP2020 Sprint MFC	2020-2314R			Recepti

The **Item** frames will be expanded.

- Here you can view details of the:
 - Fees**
 - Meters**
 - Inclusions** and
 - Contacts**linked to the selected item.

ITEM FEES

- Select the **Item Fees** tab.

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 Period: 60
 Period Type: Months
 Department: Sales Department
 Contract Manager: Judith Mudzengi
 Salesman: Judith Mudzengi
 Aggregate Billing: ☒
 Hide Fee Detail: ☐

PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
SP2020MFC	SP2020 Sprint MFC			2020-00018	Rece

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAmount
<input type="checkbox"/>	E	Evergreen Rental	0.00 1202
<input type="checkbox"/>	L	Loan	0.00 1200
<input type="checkbox"/>	R	Bank Rental	0.00 1204
<input type="checkbox"/>	S	Service	0.00 1101
<input type="checkbox"/>	I	Inhouse Rental	0.00 1201
<input checked="" type="checkbox"/>	N	Insurance	300.00 1203
			300.00

- If you have **1** global fee to charge for all machines, then link that fee to the **first** machine on the contract.
 - In this example, the customer will be billed a **R300** insurance fee for **all three** machines on the contract but only the **first** machine contains the Insurance amount.

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Item Fees	Item Meters	Item Inclusions	Item Contacts
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<input type="checkbox"/>	E	Evergreen Rental	0.00 1202
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<input type="checkbox"/>	S	Service	0.00 1101
<input type="checkbox"/>	I	Inhouse Rental	0.00 1201
<input checked="" type="checkbox"/>	N	Insurance	300.00 1203
			300.00

- If each machine has its own insurance charge, then linked those fees accordingly.

For example;

- Serial No: **2020-00018** the charge is **R150**
- Serial No: **2020-00019** the charge is **R100**
- Serial No: **2020-2314R** the charge is **R50**

This will bill the client **R300** in total, but this charge will be **split** per machine.

The screenshot shows the 'Maintenance for Contract No.: C00000237' window. The left sidebar contains 'Functions' (Notes, Documents, Hold History, Suspend History) and 'Processing' (Invoicing, Credit Notes). The main area displays contract information and a table of charges for three machines: 2020-00018, 2020-00019, and 2020-2314R. Each machine has a table of charges with columns: Item Fees, Item Metrics, Item Inclusions, Item Contracts, FeeType, FeeTypeDesc, ChargeAmount, AccountCode, COSAccountCode, InvoiceDescription, StarDate, EndDate, Period, PeriodType, BillingCycle, BillingPeriod, EscalationP, EscalationT, and EscalationF. The 'Insurance' row for each machine is highlighted, showing a charge amount of 150.00, 100.00, and 50.00 respectively.

Machine	Serial No	Charge Type	Charge Amount
2020-00018	2020-00018	Insurance	150.00
2020-00019	2020-00019	Insurance	100.00
2020-2314R	2020-2314R	Insurance	50.00

ITEM METERS

Example:

1. **Mono:**
2. **Min Billing :** R500 (for all three machines)
2. **Min Quantity :** 3000 copies (across all three machines)
3. **Copy Charge :** 5c after total usage of 3000 (across all 3 machines)

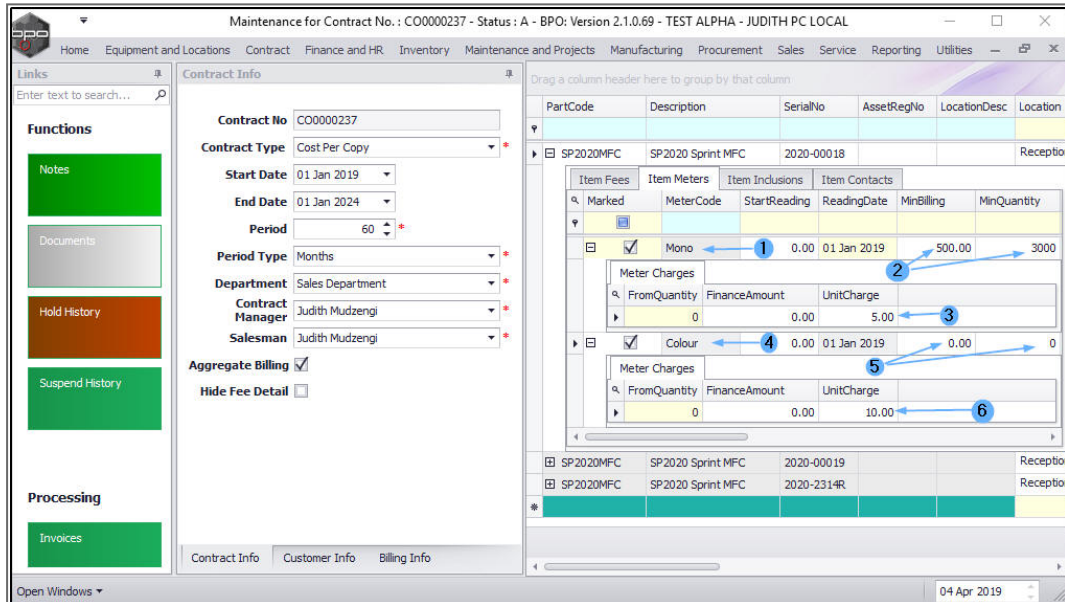
4. Colour:

5. No **Min Billing** or Free Copies
6. **Copy Charge:** 10c

The configuration must be exactly the same on each machine:

- For serial no.: **2020-00018**

1. **Mono Meter**
 2. **Min Billing:** R500, **Min Qty:** 3000
 3. **Copy Charge:** 5c
4. **Colour Meter**
 5. **Min Billing:** 0, **Min Qty:** 0
 6. **Copy Charge:** 10c



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End Date 01 Jan 2024

Period 60

Period Type Months

Department Sales Department

Contract Manager Judith Mudzengi

Salesman Judith Mudzengi

Aggregate Billing ☒

Hide Fee Detail ☐

Contract Info Customer Info Billing Info

Drag a column header here to group by that column

PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
SP2020MFC	SP2020 Sprint MFC	2020-00018			Reception

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	MeterCode	StartReading	ReadingDate
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2019
<input checked="" type="checkbox"/>	Colour	0.00	01 Jan 2019

Meter Charges	FromQuantity	FinanceAmount	UnitCharge
	0	0.00	5.00
	0	0.00	10.00

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- For Serial No.: **2020-00019**

1. **Mono Meter**
 2. **Min Billing:** R500, **Min Qty:** 3000
 3. **Copy Charge:** 5c

4. Colour Meter

5. Min Billing: 0, Min Qty: 0

6. Copy Charge: 10c

- For serial no.;2020-2314R

1. Mono Meter

2. Min Billing: R500, Min Qty: 3000

3. Copy Charge: 5c

4. Colour Meter

5. Min Billing: 0, Min Qty: 0

6. Copy Charge: 10c

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Contract Info

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Contract Type: Cost Per Copy

Start Date: 01 Jan 2019

End Date: 01 Jan 2024

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Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☒

Hide Fee Detail: ☐

Contract Info Customer Info Billing Info

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PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
SP2020MFC	SP2020 Sprint MFC	2020-00018			Reception
SP2020MFC	SP2020 Sprint MFC	2020-00019			Reception
SP2020MFC	SP2020 Sprint MFC	2020-2314R			Reception

Item Fees	Item Meters	Item Indusions	Item Contacts		
Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2019	500.00	3000
Meter Charges					
	FromQuantity	FinanceAmount	UnitCharge		
	0	0.00	5.00		
<input checked="" type="checkbox"/>	Colour	0.00	01 Jan 2019	0.00	0
Meter Charges					
	FromQuantity	FinanceAmount	UnitCharge		
	0	0.00	10.00		

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