

CONTRACT

LIFE BASED / PRE-PAID CONTRACTS (PRE V2.3.0.0)

This contract type is to be used where a set meter charge was paid ahead of contract creation, and meters are not billed until their usage limit is reached.

The prepaid contract usage limit is configured as the initial **Minimum Billing and Meter Charge Setup Quantities**.

Only **meters** are considered to be prepaid.

Fees continue to be billed, based on the billing cycle.

Meters still appear in monthly usage for reading capture. This reading needs to be captured correctly, as the prepaid meter usage will determine whether the limit has been reached (regardless of meter resets).

When the meter usage limit is reached, the contract is placed on hold and an email is sent to the customer account manager.

It is up to the contract manager to review the contract, update the meter minimum billing information, change the contract type and release the contract from hold to enable continuation with standard contract billing.

The Enforce Authorisation flag should always be selected. Prepaid contracts should be reviewed, then released for authorisation and then authorised to ensure that month end billing is correct.

CONFIGURATION REQUIRED

- On [Creating a New Contract](#) In the Contract Info details panel, in the Contract Type field, **Prepaid Contract** must be selected from the drop-down menu.

Maintenance for Contract No.: C00000044 - Status: A - BPO: Version 2.1.0.43 - 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

Contract Info

Contract No: C00000044

Contract Type: **Prepaid Contract**

Start Date: 25 Oct 2016

End Date: 25 Oct 2021

Period: 60

Period Type: Months

Department: Technical

Contract Manager: Belinda Sherman

Salesman: Ben Johnson

Aggregate Billing ☐

Hide Fee Detail ☐

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Lo
SP19-123456	SP19-12 Colour Copier	Hardware	SP19-12	1912-102032		Ra
	Bothas Shop					Gr
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-102040		Be

Customer Info Contract Info Billing Info

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- When the new prepaid contract has been set up and saved, the type of contract that has been selected (**Prepaid**) will be indicated

in the **Contract Type** and **Contract Type Description** columns in the **Contract Listing** screen.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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Add Edit Delete View Save Layout Hold Release For Approval Suspend Remove From Approval Close Contract Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Run...

Links
Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

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ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	D
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014	22 Apr 2019	S
CO0000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills ...		07 Jan 2014	07 Jan 2019	S
CO0000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	Contra...	09 May 2014	09 May 2019	S
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	S
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	S
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	S
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	S
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	S
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	S
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	S
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016	24 Mar 2021	S
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	S
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	T
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	S
CO0000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	T
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	S
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	T

MINIMUM BILLING

The [Minimum Billing](#) information on the contract item needs to be configured correctly.

MINIMUM QUANTITY

- This is the prepaid meter usage limit that is set at the start of the contract.
 - Make sure this usage limit is configured for all meters on the contract item.
 - Once this usage limit is reached, based on billing run meter reading captures, the contract must be reviewed, so that meter billing can start.

This is why the contract is placed on **hold** and the contract manager **notified** via email.

The **contract type** must now be changed, so that this contract is no longer monitored and ensure that the [Minimum Billing Amount, Minimum Billing Quantity and Meter Charges](#) are correct as per required meter billing from this point onward.

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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	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP19-123456	SP19-12 Colour Copier	Hardware	SP19-12	1912-102032		Reception		129 Bull Rd, Jersey Town, New...

Item Fees Item Meters Item Inclusions Item Contacts

Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode
<input checked="" type="checkbox"/>	Mono	0.00	02 Jan 2018	0.00	5000	1101	2101	8	Percentage	10.00	

Meter Charges

FromQuantity	FinanceAmount	UnitCharge
0	0.00	120.00

Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode
<input type="checkbox"/>	Colour	0.00	02 Jan 1900	0.00	0			8	Percentage	10.00	

[EditValue is null]

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
	Bothas Shop					Green Hills	Bothas Shop	129 Bull Rd, Jersey Town, New...
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-102040		Back Office		129 Bull Rd, Jersey Town, New...

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You will now need to Release and Approve the contract. This contract will now be part of the billing cycle as normal.

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