

## CONTRACT

### AGGREGATE BILLING CONTRACT

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

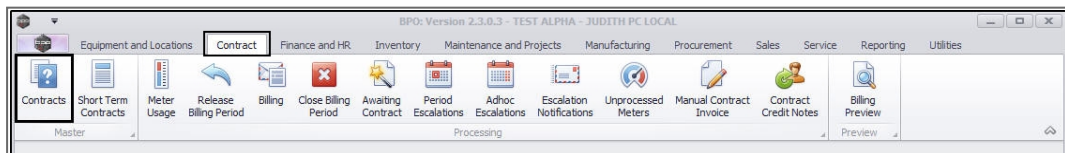
- Meter min (minimum) billing is global per meter **type**.
- An aggregate billing contract only supports a **single billing customer** on meters.

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).

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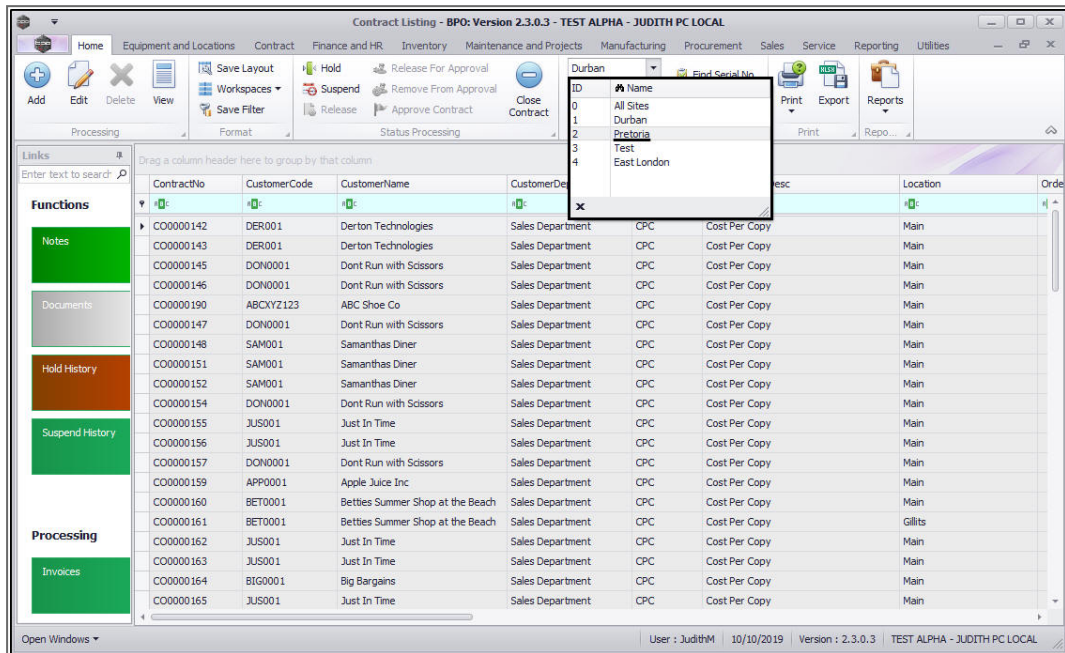
**Ribbon Access:** *Contract > Contracts*

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

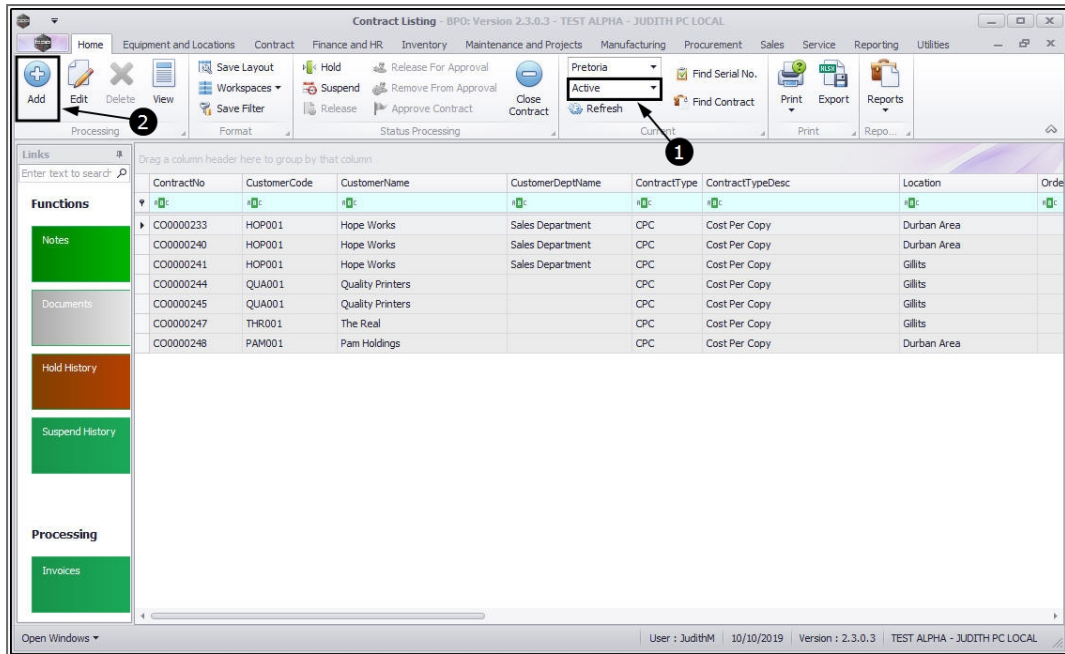
- To select the **Site** that you wish to work in, click on the **drop-down arrow** and select the relevant site.
  - In this example, **Pretoria** is selected.



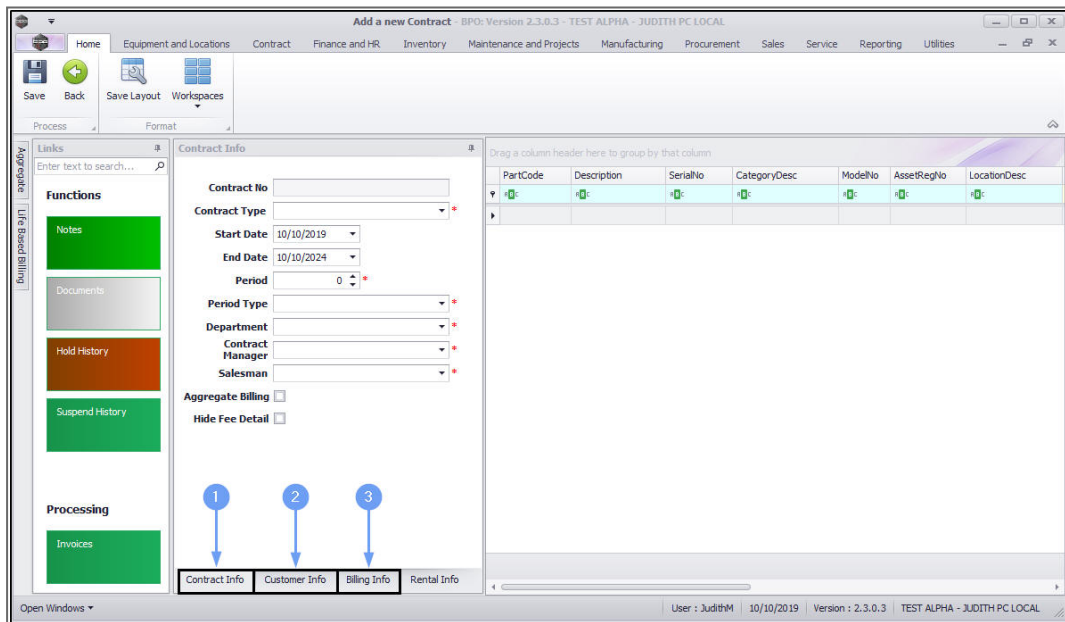
- By default, this screen will list all the **Active** contracts for the selected site.
  - You do not need to change this status to create / add a new contract.

## CREATE AGGREGATE BILLING CONTRACT

- Click on **Add**.

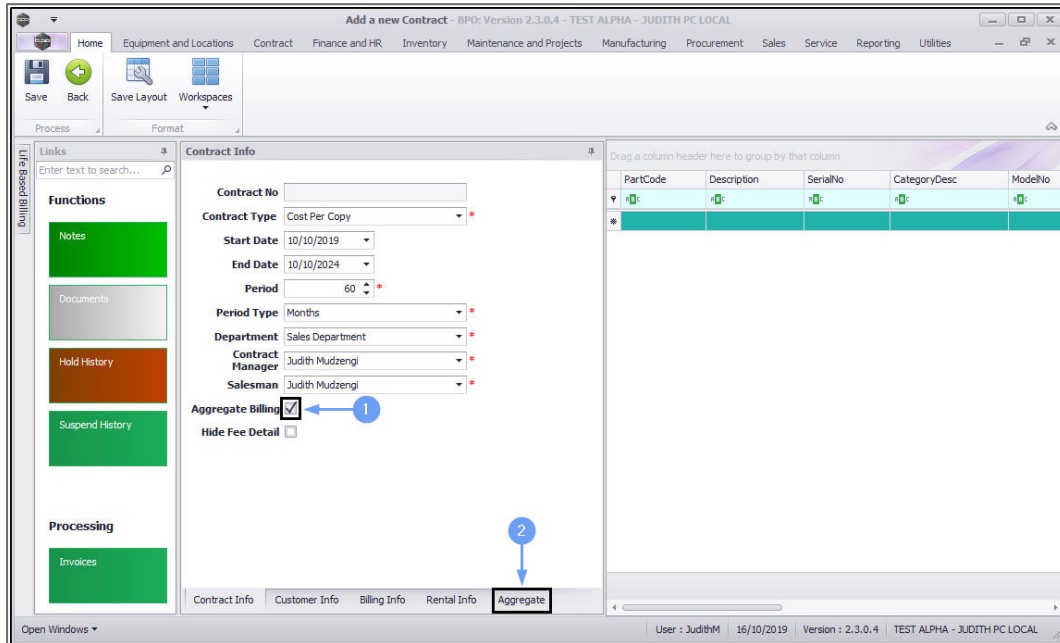


- The **Add a new Contract** screen will be displayed.
- Populate the following frames with the relevant information:
  1. **Contract Info**
  2. **Customer Info**
  3. **Billing Info**



## AGGREGATE BILLING FLAG

1. In the **Contract Info frame**, select the **Aggregate Billing** flag.
2. The **Aggregate** tab will move to the bottom of the screen.

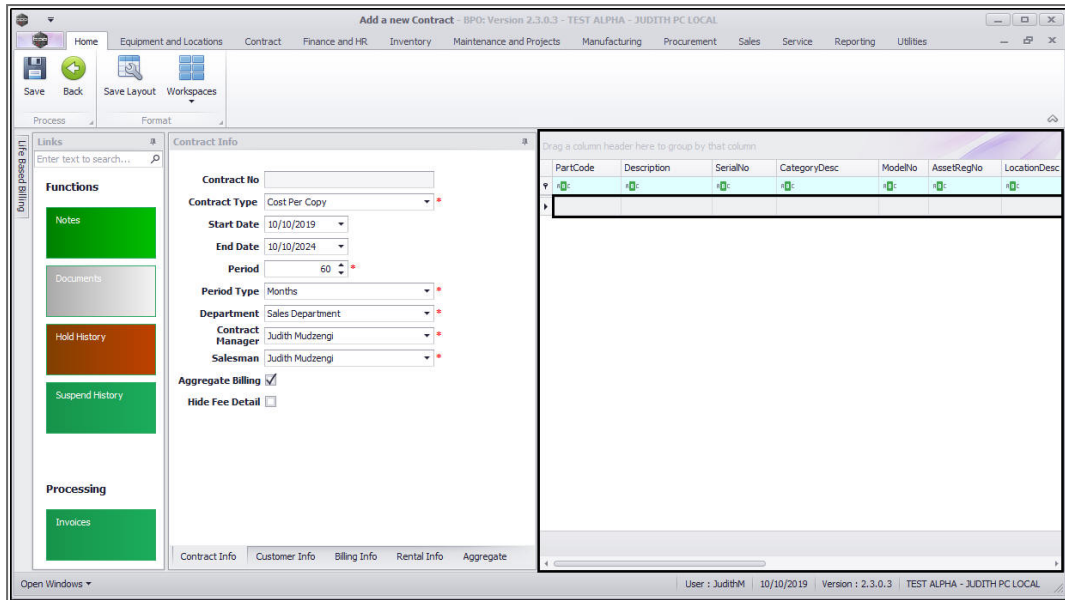


The screenshot shows the 'Add a new Contract' window. The 'Contract Info' frame is active, displaying various contract details. The 'Aggregate Billing' checkbox is checked, indicated by a blue circle with the number 1. The 'Aggregate' tab is selected at the bottom of the window, indicated by a blue circle with the number 2. The window also shows a 'Functions' sidebar on the left and a 'Parts' table on the right.

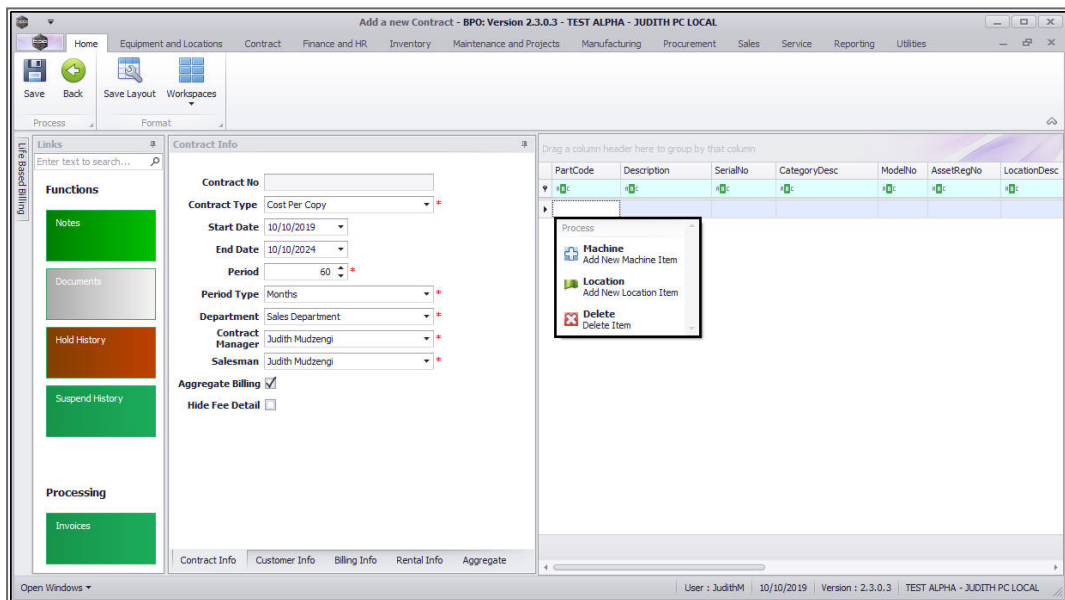
## CONTRACT PARTS FRAME

- **Right click** anywhere in the **row** of the **Parts** frame.



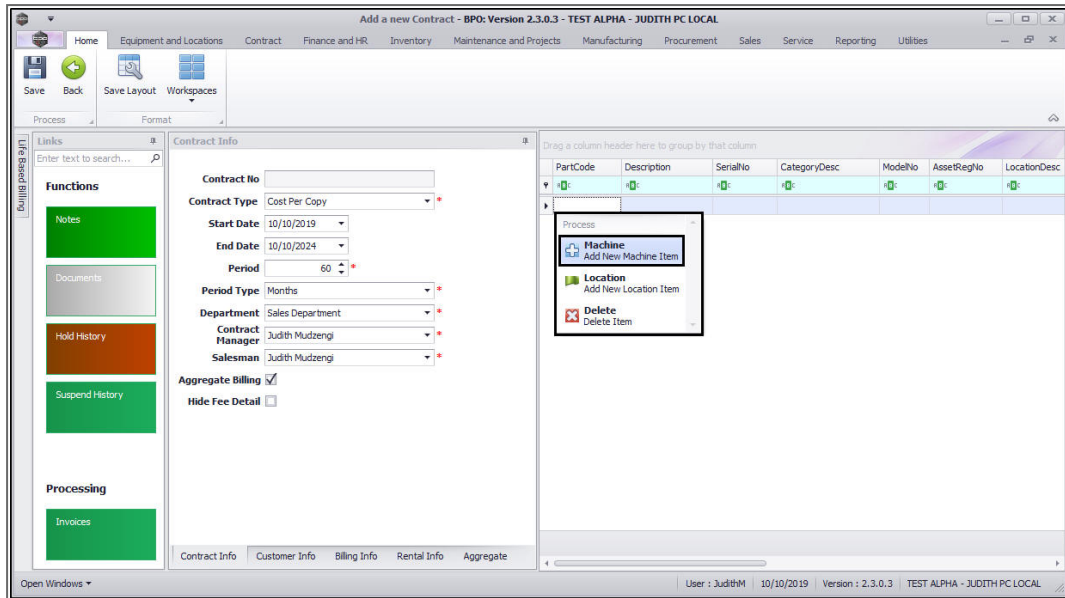


- A **Process** menu will pop up.



## ADD CONTRACT ITEM

- Click on **Machine** - Add New Machine Item.



**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

**Contract Info**

Contract No:

Contract Type: Cost Per Copy

Start Date: 10/10/2019

End Date: 10/10/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☒

Hide Fee Detail: ☐

Process

Machine  
Add New Machine Item

Location  
Add New Location Item

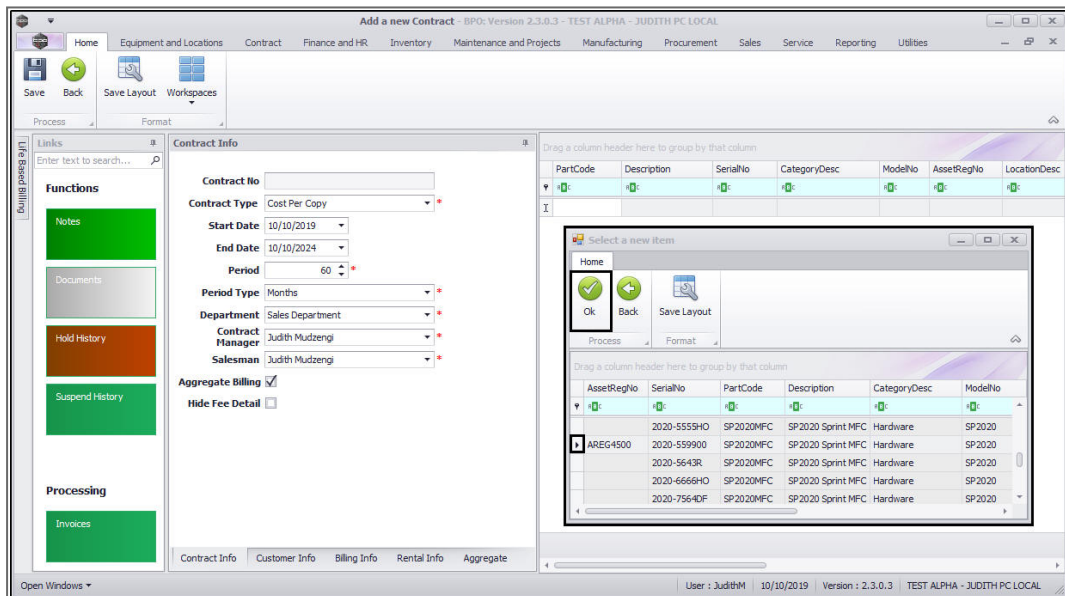
Delete  
Delete Item

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc

Contract Info | Customer Info | Billing Info | Rental Info | Aggregate

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

- The **Select a new item** pop up screen will appear.
- Click on the **row selector** in front of the **machine** that you wish to **link** to this **contract**.
- Click on **Ok**.



**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

**Contract Info**

Contract No:

Contract Type: Cost Per Copy

Start Date: 10/10/2019

End Date: 10/10/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☒

Hide Fee Detail: ☐

Select a new item

Home | Back | Save Layout

Process | Format

Drag a column header here to group by that column

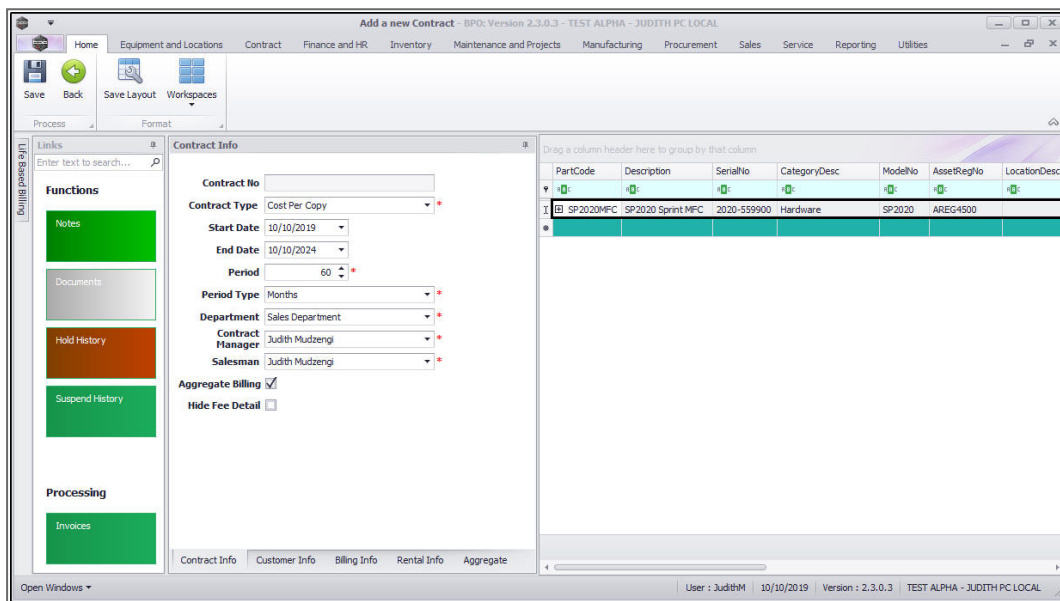
AssetRegNo	SerialNo	PartCode	Description	CategoryDesc	ModelNo
	2020-5559HO	SP2020MFC	SP2020 Sprint MFC	Hardware	SP2020
AREG4500	2020-559900	SP2020MFC	SP2020 Sprint MFC	Hardware	SP2020
	2020-5643R	SP2020MFC	SP2020 Sprint MFC	Hardware	SP2020
	2020-6666HO	SP2020MFC	SP2020 Sprint MFC	Hardware	SP2020
	2020-7564DF	SP2020MFC	SP2020 Sprint MFC	Hardware	SP2020

Contract Info | Customer Info | Billing Info | Rental Info | Aggregate

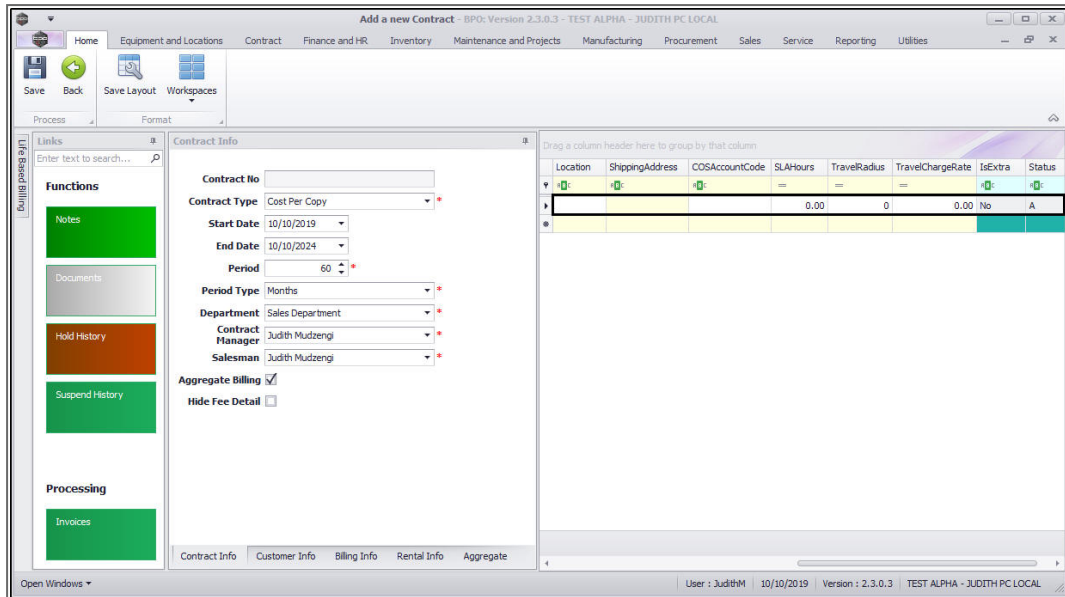
User: JudithM | 10/10/2019 | Version: 2.3.0.3 | TEST ALPHA - JUDITH PC LOCAL

- The following columns will auto populate according to your item selection:

- Part Code
- Description
- Category Description
- Model No
- Serial No
- Asset Register No
- The **Location Desc** field is only used when adding a new location item.



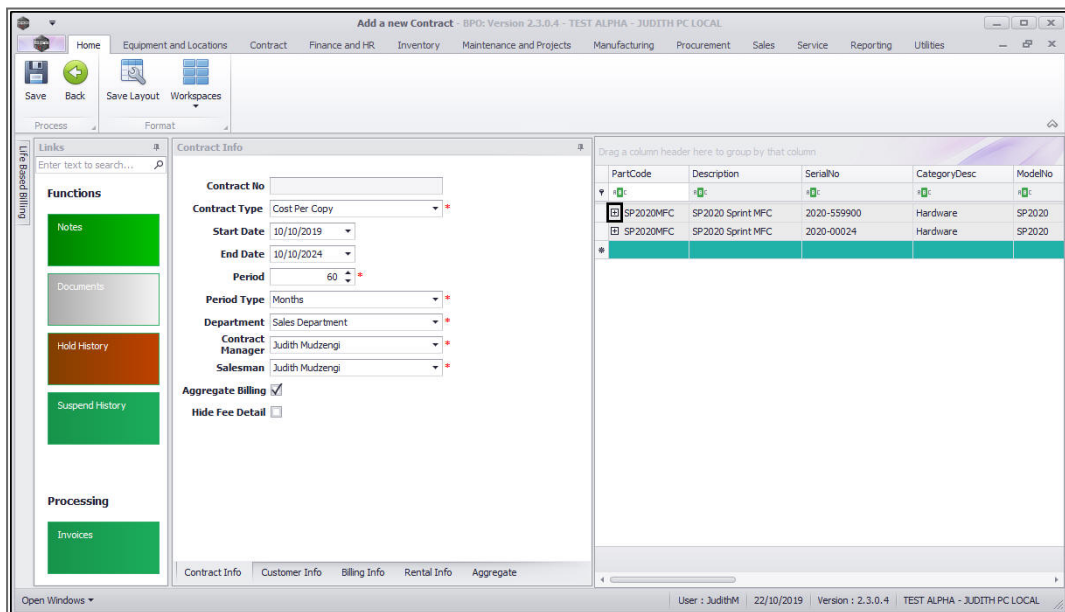
- Link the following to the contract item:
  - Location
  - Shipping Address
  - COS Account Code
  - SLA Hours if applicable
  - Travel Radius if applicable
  - Travel Charge if applicable
- The **Is Extra** and **Status** fields are static.



- Follow the steps above to link additional contract items, as required.

## PART ITEMS FRAME

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



- Fees
- Meters
- Inclusions and
- Contacts

to the selected contract item.

**Add a new Contract - BPO: Version 2.3.0.4 - 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

**Contract Info**

Contract No

Contract Type: Cost Per Copy

Start Date: 10/10/2019

End Date: 10/10/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☒

Hide Fee Detail: ☐

**Drag a column header here to group by that column**

PartCode	Description	SerialNo	CategoryDesc	ModelNo
SP2020MFC	SP2020 Sprint MFC	2020-559900	Hardware	SP2020

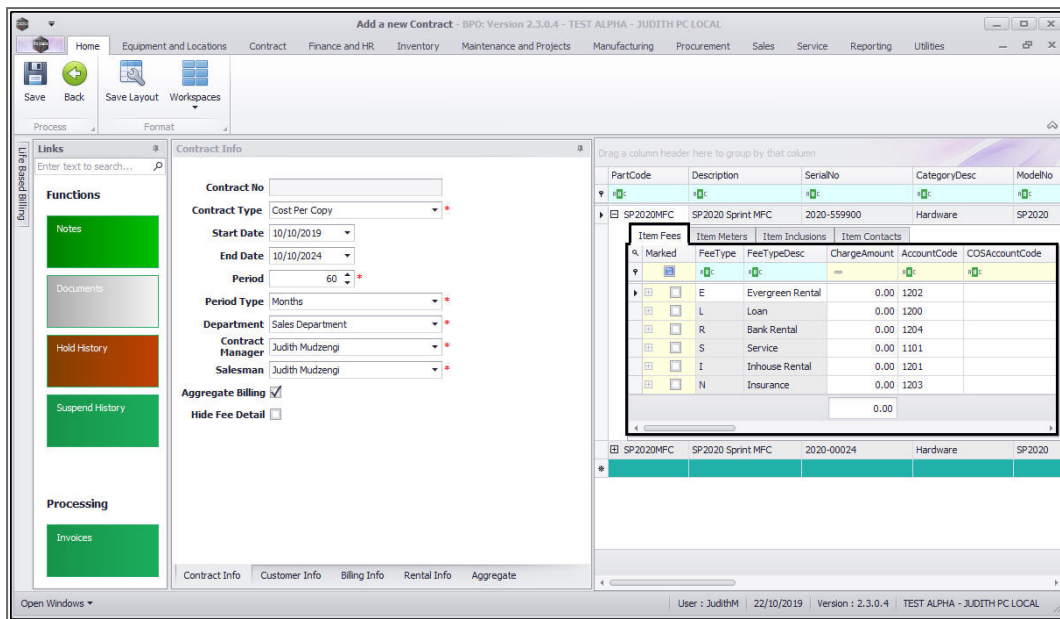
Item Fees	Item Meters	Item Inclusions	Item Contacts	ChargeAmount	AccountCode	COSAccountCode
Marked	FeeType	FeeTypeDesc				
	E	Evergreen Rental		0.00	1202	
	L	Loan		0.00	1200	
	R	Bank Rental		0.00	1204	
	S	Service		0.00	1101	
	I	Inhouse Rental		0.00	1201	
	N	Insurance		0.00	1203	
				0.00		

SP2020MFC SP2020 Sprint MFC 2020-00024 Hardware SP2020

Contract Info Customer Info Billing Info Rental Info Aggregate

User : JudithM 22/10/2019 Version : 2.3.0.4 TEST ALPHA - JUDITH PC LOCAL

- The **Item Fees** tab is selected by default.



## AGGREGATE FEES SET UP

If you have **aggregate billing** on item fees:

1. Do **not** select any **Item Fee** in the **Item Fees** tab as you would do on a **standard contract**.
2. Instead, click on the **Aggregate** tab.

**Contract Info**

Contract No:

Contract Type: Cost Per Copy \*

Start Date: 10/10/2019

End Date: 10/10/2024

Period: 60

Period Type: Months \*

Department: Sales Department \*

Contract Manager: Judith Mudzengi \*

Salesman: Judith Mudzengi \*

Aggregate Billing: ☒

Hide Fee Detail: ☐

**Aggregate**

## AGGREGATE FEES SECTION

1. The **Aggregate** frame will be expanded and is divided into the following sections:
  2. Aggregate **Fees**
  3. Aggregate **Meters**

**Aggregate**

IdMarked	IdFeeType	IdFeeTypeDesc	IdChargeAmount	IdAccountCode
<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

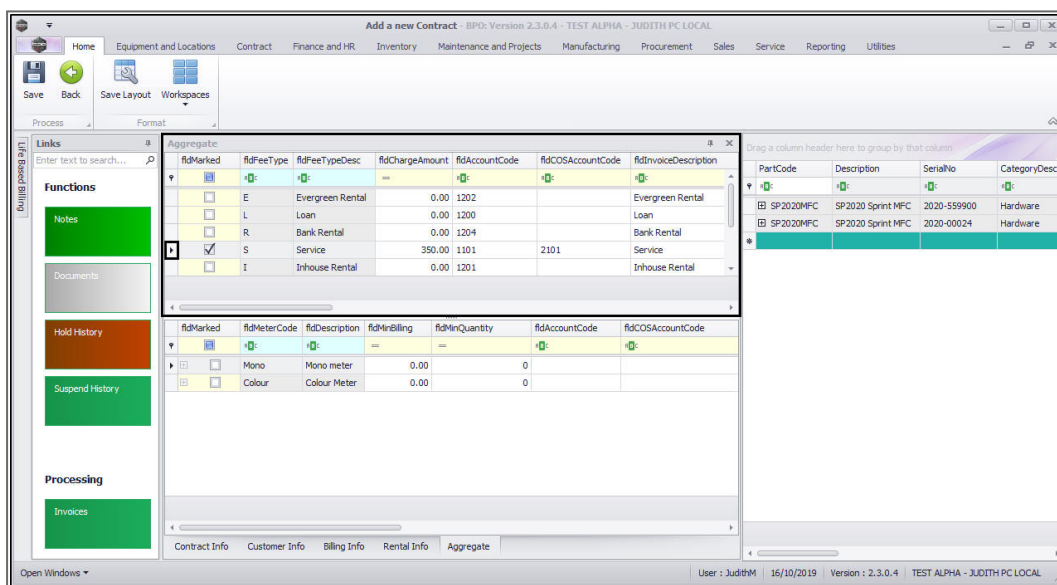
  

IdMarked	IdMeterCode	IdDescription	IdMinBilling	IdMinQuantity
<input type="checkbox"/>	Mono	Mono meter	0.00	0
<input type="checkbox"/>	Colour	Colour Meter	0.00	0



Set up the fees that need to be aggregate in the **Aggregate Fees** section.

- **Marked:** Click on the check box in front of the aggregate **Fee Type** to be charged.
  - In this image **S - Service** has been selected as an example.
- **Charge Amount:** Type in or use the arrow indicators to select the fee amount to be charged.
- **Account Code:** This will auto populate with the account code linked to this fee item.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.
- **Invoice Description:** This will auto populate but you can type in an alternative description to be used for this fee on the invoice. The description will reflect on the contract invoice.



fIdMarked	fIdFeeType	fIdFeeTypeDesc	fIdChargeAmount	fIdAccountCode	fIdCOSAccountCode	fIdInvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input checked="" type="checkbox"/>	S	Service	350.00	1101	2101	Service
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201		Inhouse Rental

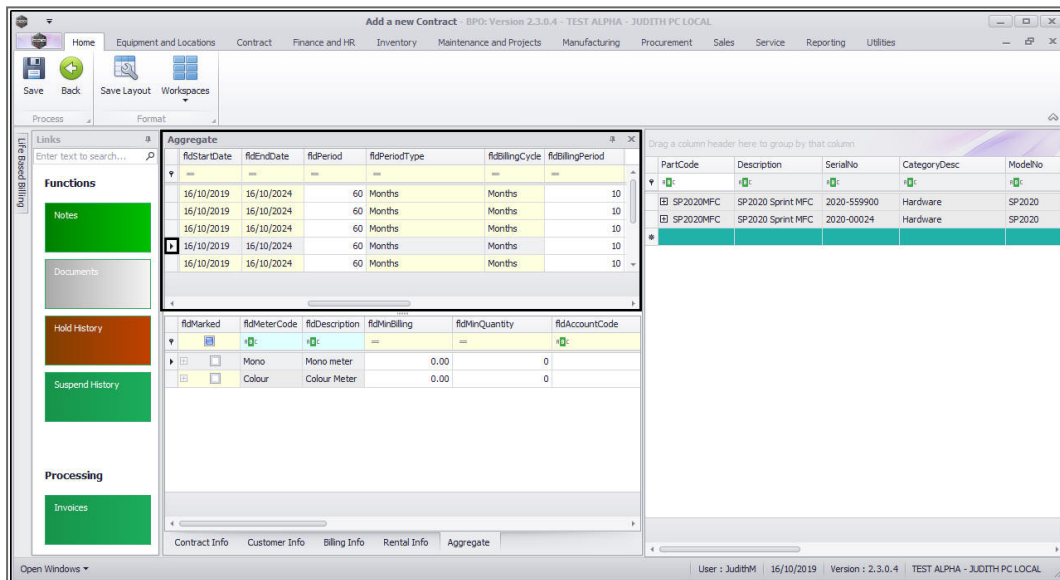
fIdMeterCode	fIdDescription	fIdInBilling	fIdInQuantity	fIdAccountCode	fIdCOSAccountCode
<input type="checkbox"/>	Mono	Mono meter	0.00	0	
<input type="checkbox"/>	Colour	Colour Meter	0.00	0	

**Scroll right** to view the next columns in this frame.

- **Start Date and End Date:** These fields will auto populate, click on the drop-down arrow and use the calendar function to select the

correct start and end date if applicable.

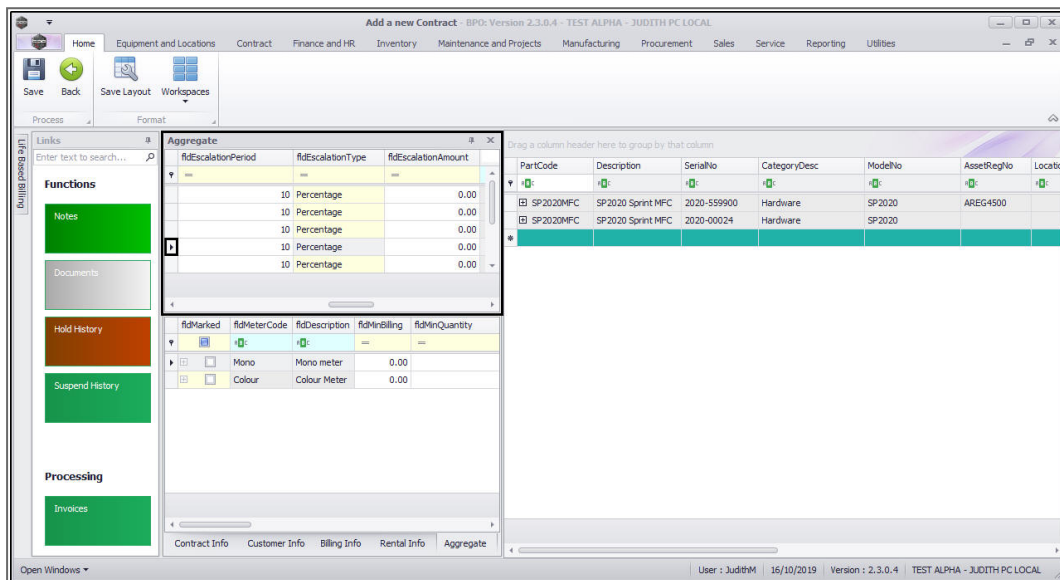
- **Note:** Take note that the contract fee will only bill from the **start** date, and will stop billing at the **end** date.
- **Period & Period Type:** These fields will auto populate, click on the text boxes and either type in or use the drop-down arrows to select the correct period and period type if applicable.
- **Billing Cycle:** This field will auto populate, click on the text boxes and use the drop-down arrow to select the correct billing cycle if applicable.
- **Billing Period:** This will auto populate, click on the text boxes and either type in or use the drop-down arrow to select the correct billing period if applicable.



**Scroll right** to view the remaining columns in this frame.

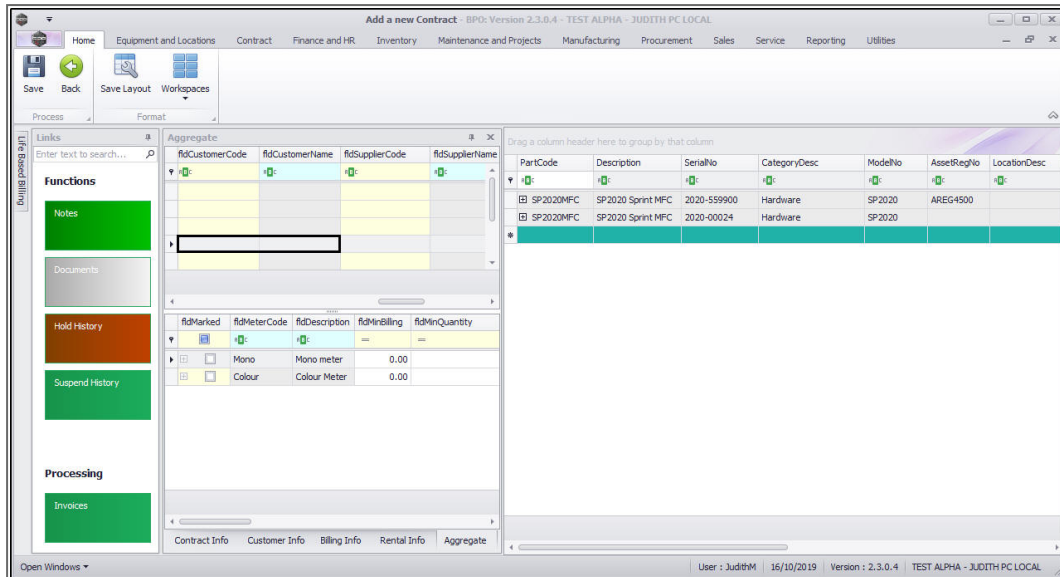
- **Escalation Period:** This field will auto populate, click on the text boxes and either type in or use the drop-down arrow to select the correct escalation period if applicable.

- **Escalation Type:** This will auto populate, click on the drop-down arrow in the text box to select the correct escalation type if applicable.
- **Escalation Amount:** Click on the text box and either type in or use the arrow indicators to select the escalation amount if required.

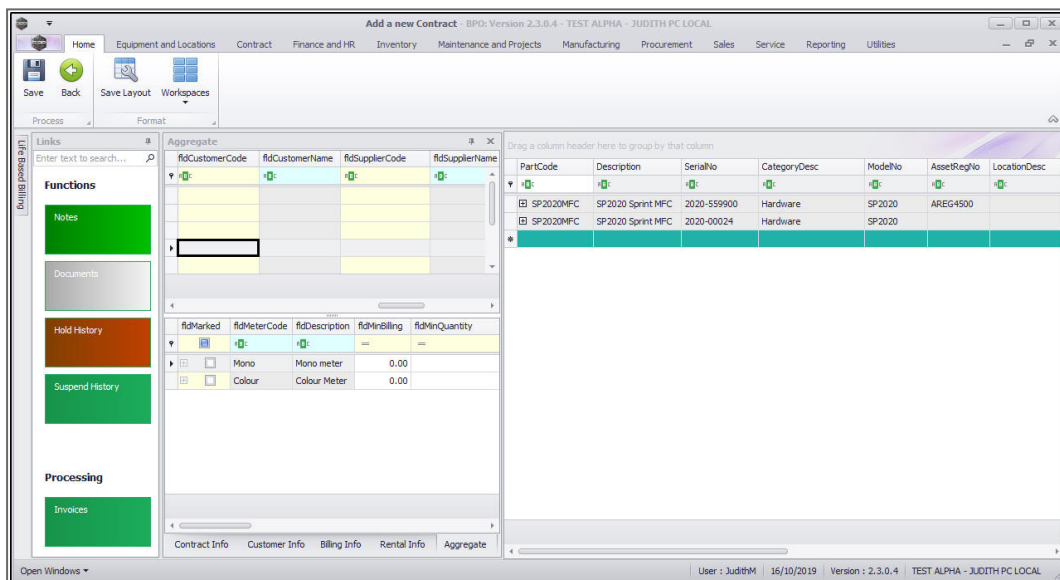


## Customer Code and Customer Name

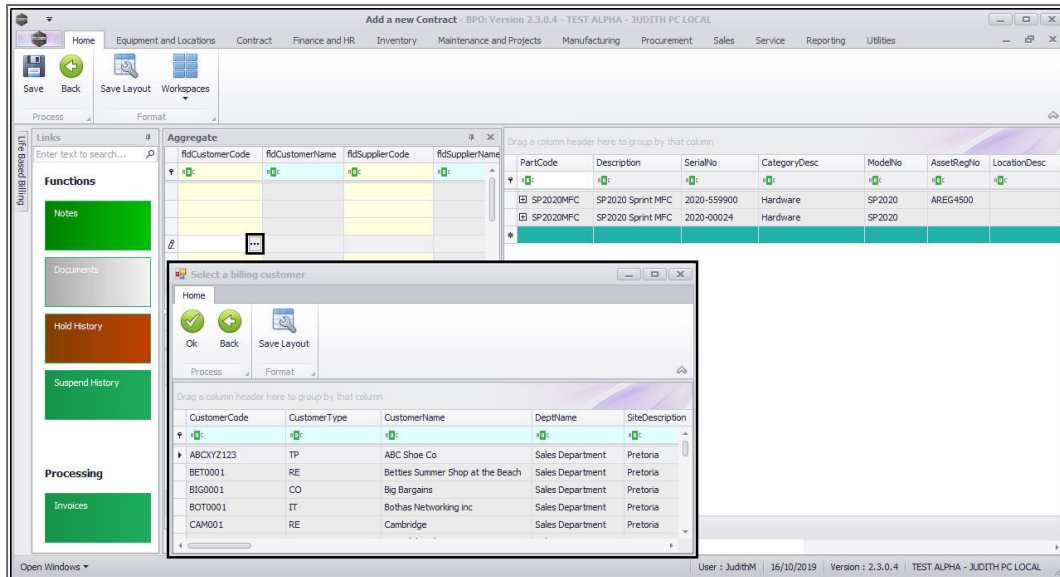
- Only populate these 2 fields if another party (a separate billing customer) is going to pay the **Item Fees** on behalf of the customer.
- If these fields are left blank, **BPO** will bill the customer linked to the contract.
  - **Note 1:** BPO only supports different billing customers on an aggregate contract from **BPO v2.3.0.4**.
  - **Note 2:** Follow the next 4 screenshots **only** if you wish to link another party as the billing customer.



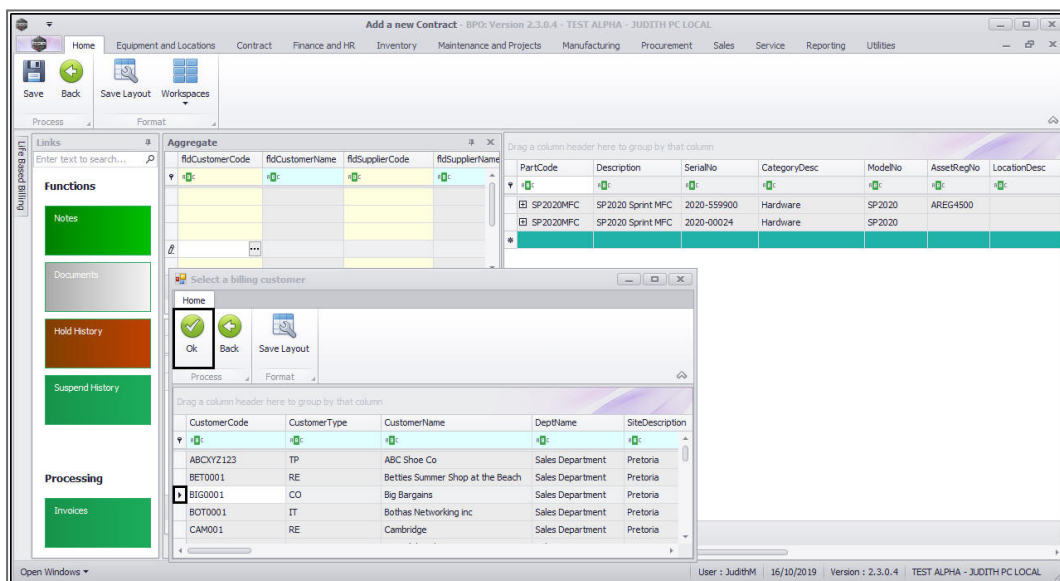
- **Customer Code:**
  - Click in the *Customer Code* text box.



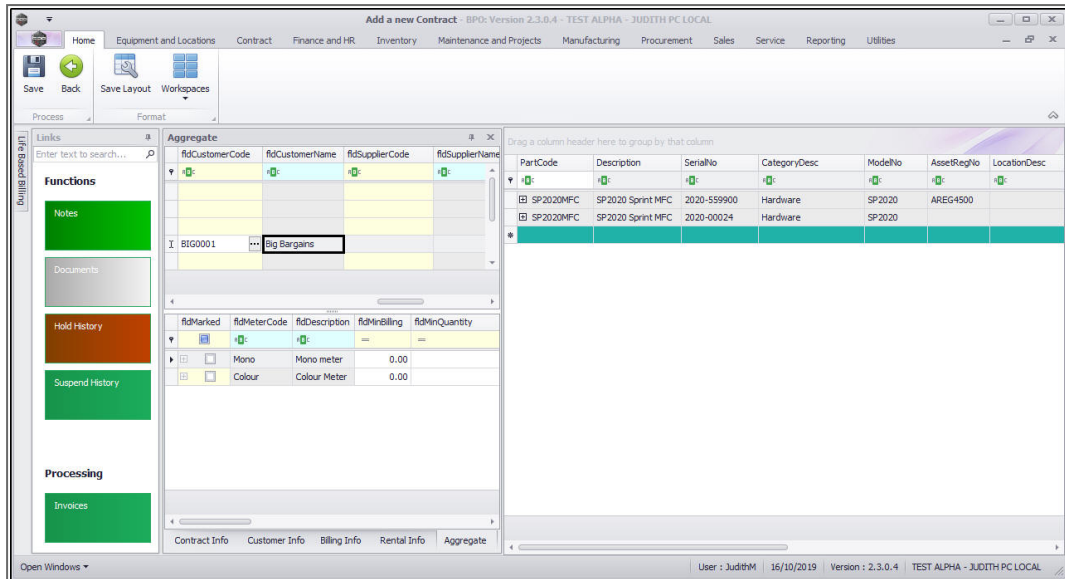
- **Customer Code:**
  - An *Ellipsis* button will be revealed.
  - Click on this button to display the *Select a billing customer* pop up screen.



- **Customer Code:**
  - Click on the **row selector** in front of the **Billing customer** that you wish to **link** to this **contract**.
  - Click on **Ok**.



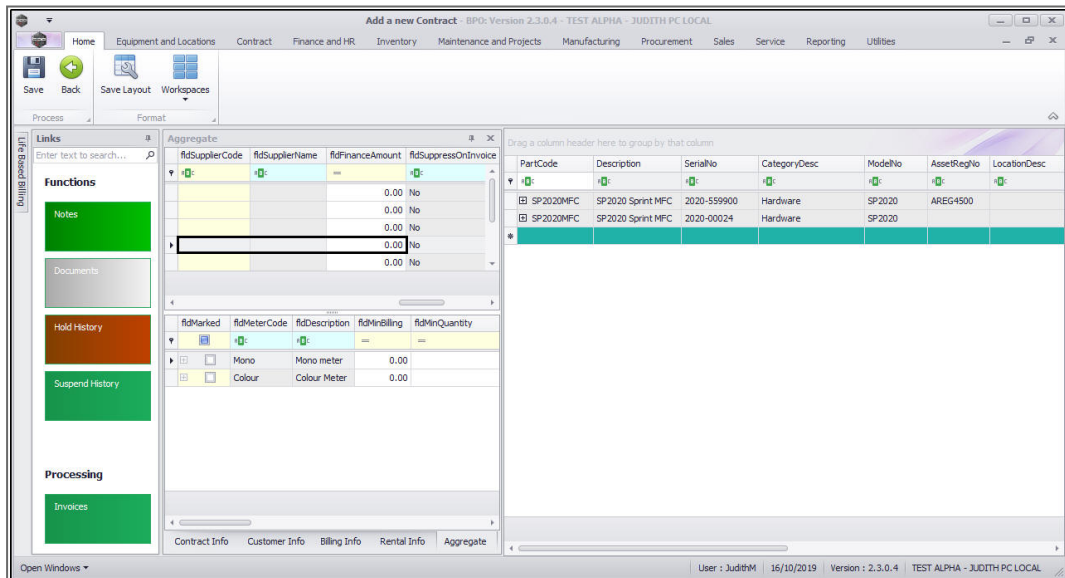
- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.



PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc
SP2020MFC	SP2020 Sprint MFC	2020-559900	Hardware	SP2020	AREG4500	
SP2020MFC	SP2020 Sprint MFC	2020-00024	Hardware	SP2020		

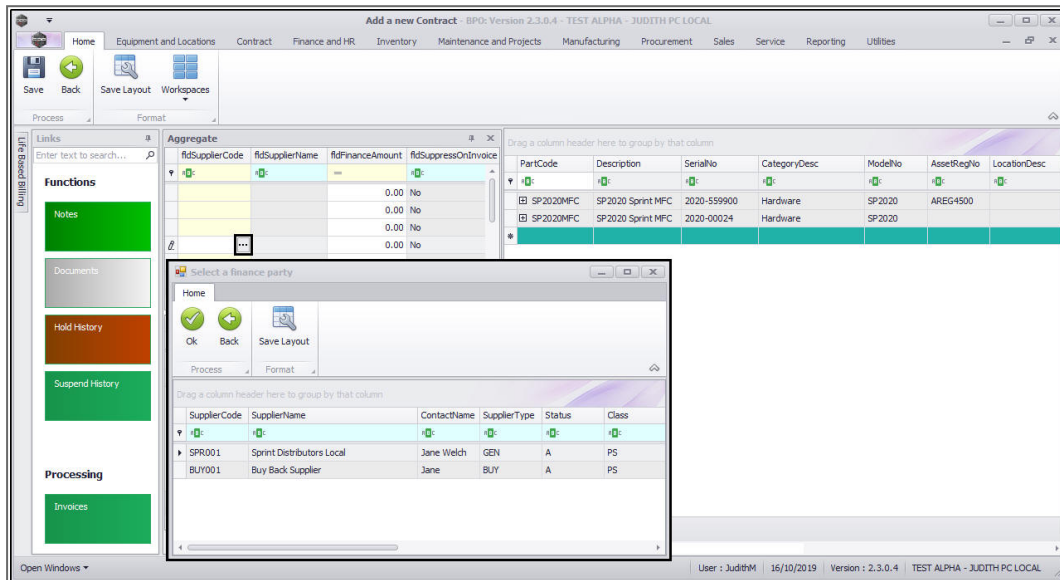
- **Supplier Code / Supplier Name / Finance Amount**
  - These fields should only be populated if there is a **Back to Back Deal** with a third party who is set up on **BPO** as a **Supplier**.

Follow the next **5** screenshots **only** if you wish to link a supplier for rental back-to-back (finance house bills company & company bills client).



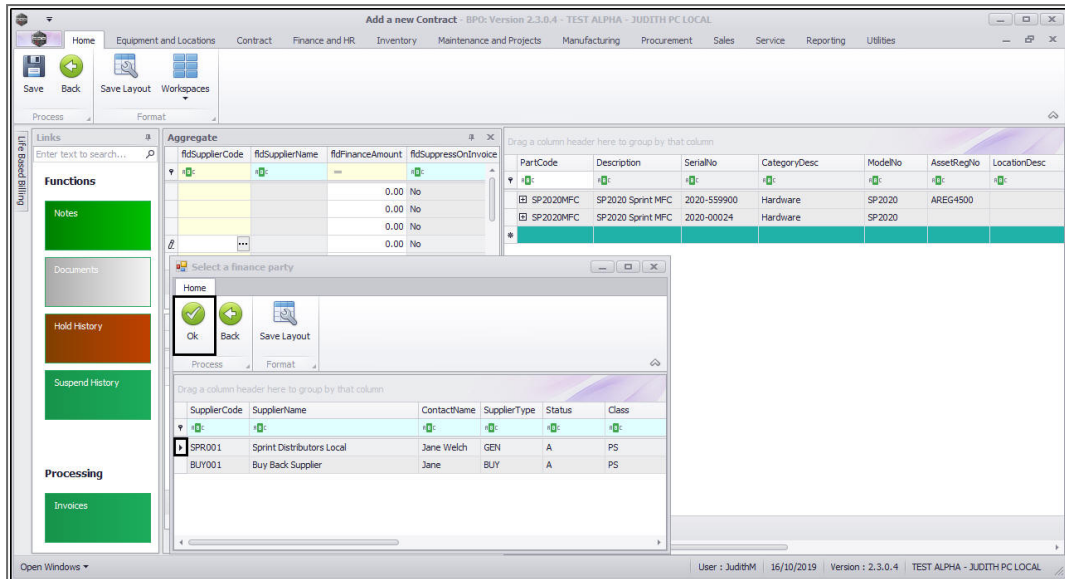
fIdSupplierCode	fIdSupplierName	fIdFinanceAmount	fIdSuppressOnInvoice
		0.00	No
		0.00	No
		0.00	No
		0.00	No
		0.00	No

- **Supplier Code:**
  - Click on the **Supplier Code** text box to reveal an **Ellipsis** button.
  - Click on this button to display the **Select a finance party** pop up screen.

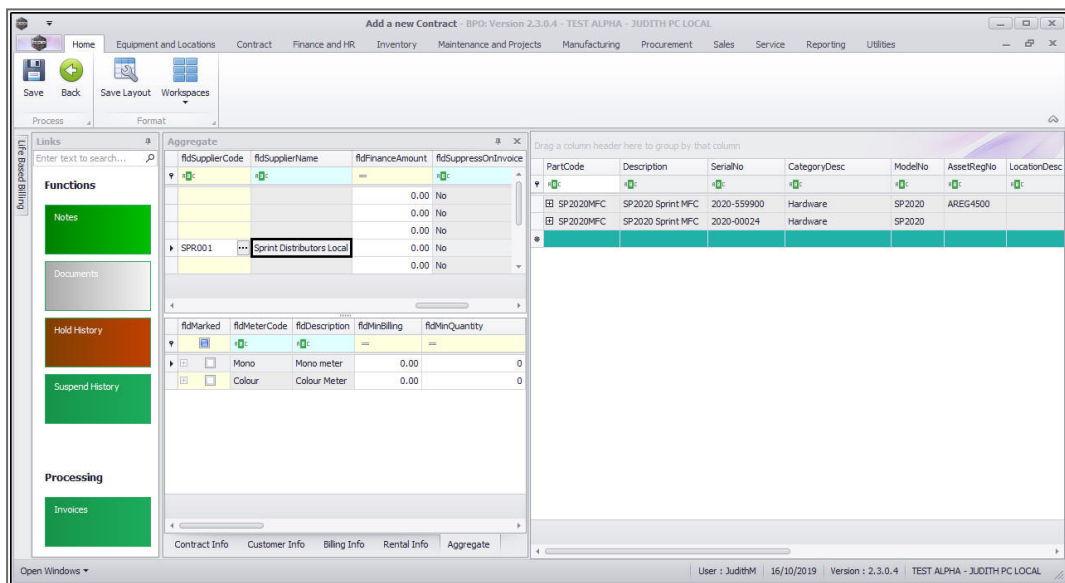


- **Supplier Code:**
  - Select the **row** of the **Supplier** that you wish to **link** to this **item**.
  - Click on **Ok**.

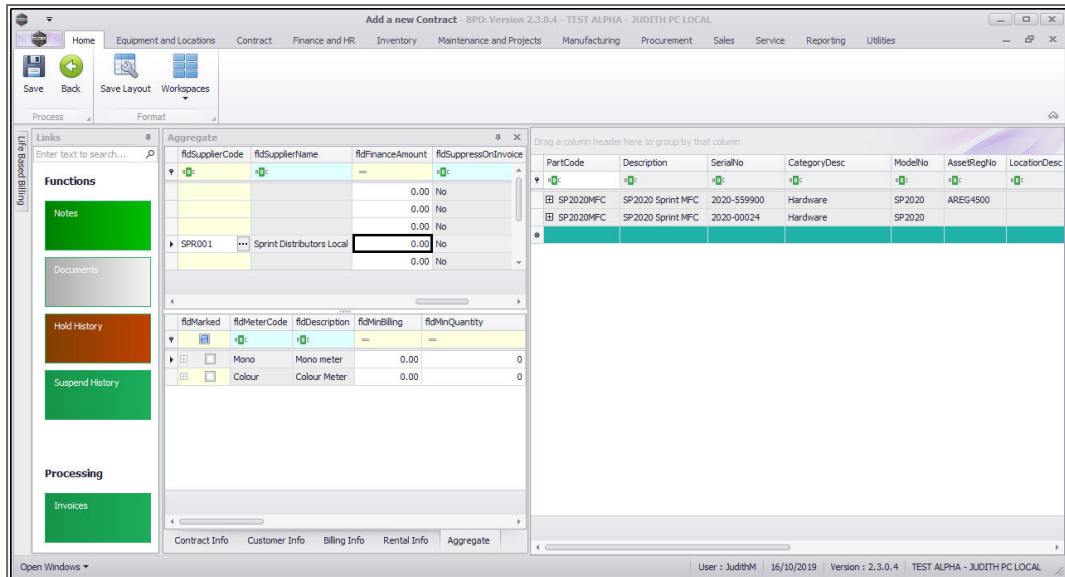




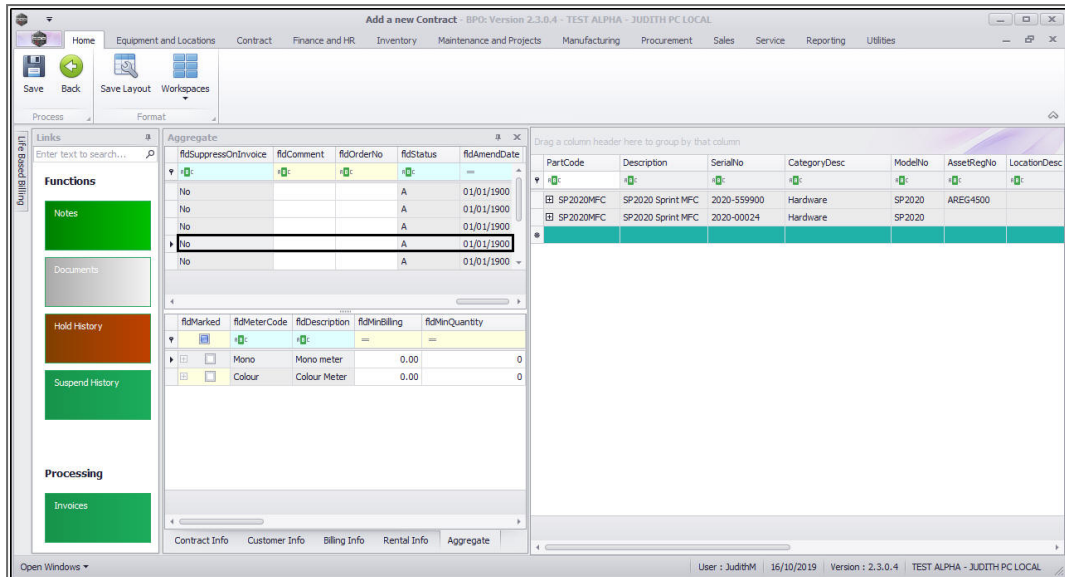
- **Supplier Name:** This will auto populate once the supplier code has been selected.



- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



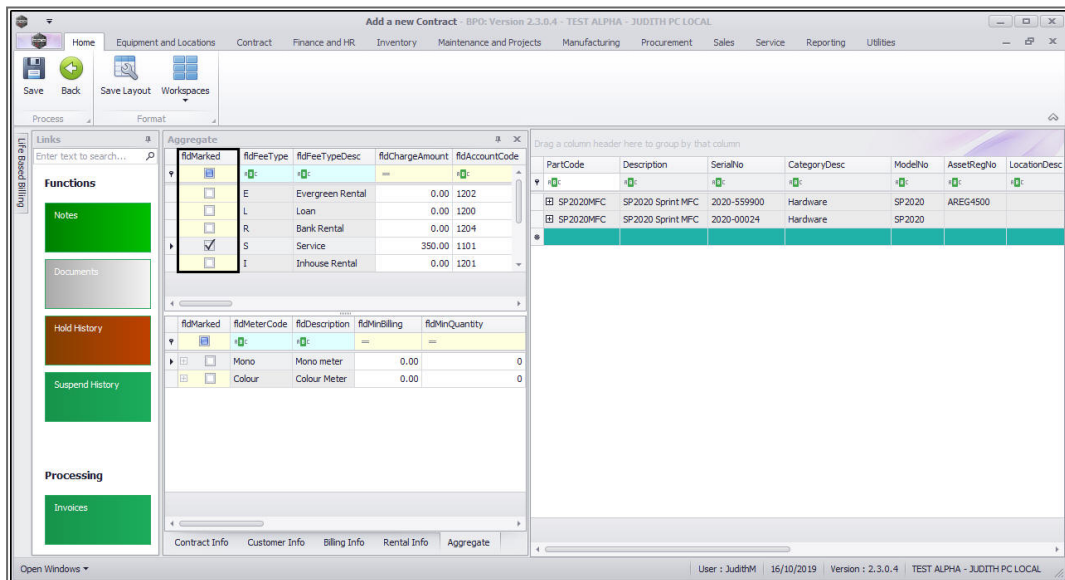
- **Suppress on Invoice:** This is set to No and cannot be changed. This means you cannot hide the aggregate fee information on the invoice.
- **Comment:** Click in this text box and type in a comment regarding this aggregate fee, if required.
- **Order No:** Type in a customer order number relevant to this item, if required.
- **Status:** This field defaults as **A** (Active).
- **Amend Date:** This field is static.
- The **Add an Item Fee** process is now complete.



fIdSuppressOnInvoice	fIdComment	fIdOrderNo	fIdStatus	fIdAmendDate	PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc
No			A	01/01/1900	SP2020MFC	SP2020 Sprint MFC	2020-559900	Hardware	SP2020	AREG4500	
No			A	01/01/1900	SP2020MFC	SP2020 Sprint MFC	2020-00024	Hardware	SP2020		

## LINK ADDITIONAL FEES

- **Scroll back** to the **Marked** column.
- You can now set up **additional fees** for this machine by following the **above process**, if required, before moving on to the next frame.

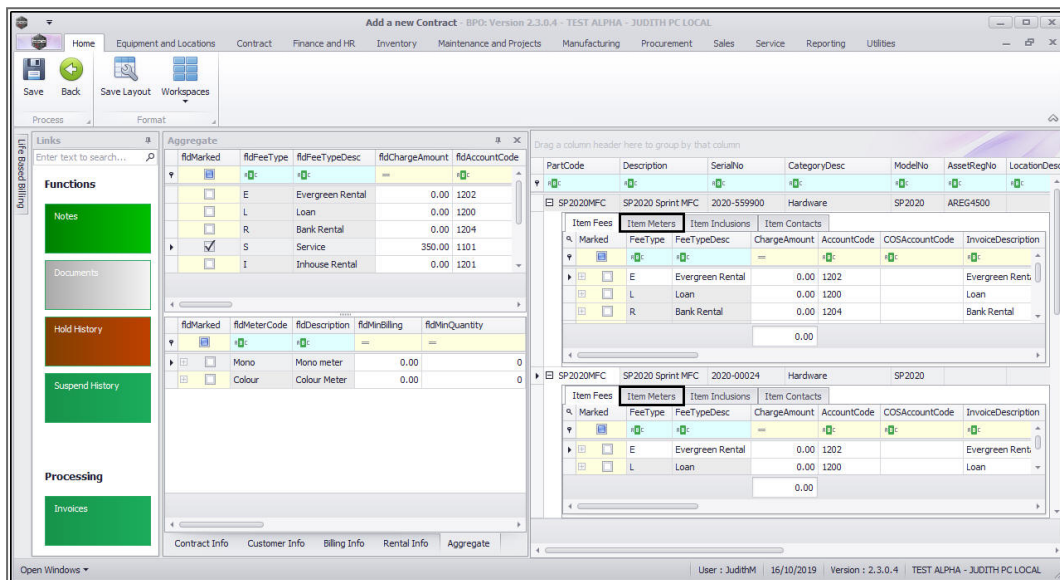


fIdMarked	fIdMeterCode	fIdDescription	fIdMinBilling	fIdMinQuantity	fIdFeeType	fIdFeeTypeDesc	fIdChargeAmount	fIdAccountCode
<input type="checkbox"/>					E	Evergreen Rental	0.00	1202
<input type="checkbox"/>					L	Loan	0.00	1200
<input type="checkbox"/>					R	Bank Rental	0.00	1204
<input checked="" type="checkbox"/>					S	Service	350.00	1101
<input type="checkbox"/>					I	Inhouse Rental	0.00	1201

## AGGREGATE METERS SET UP

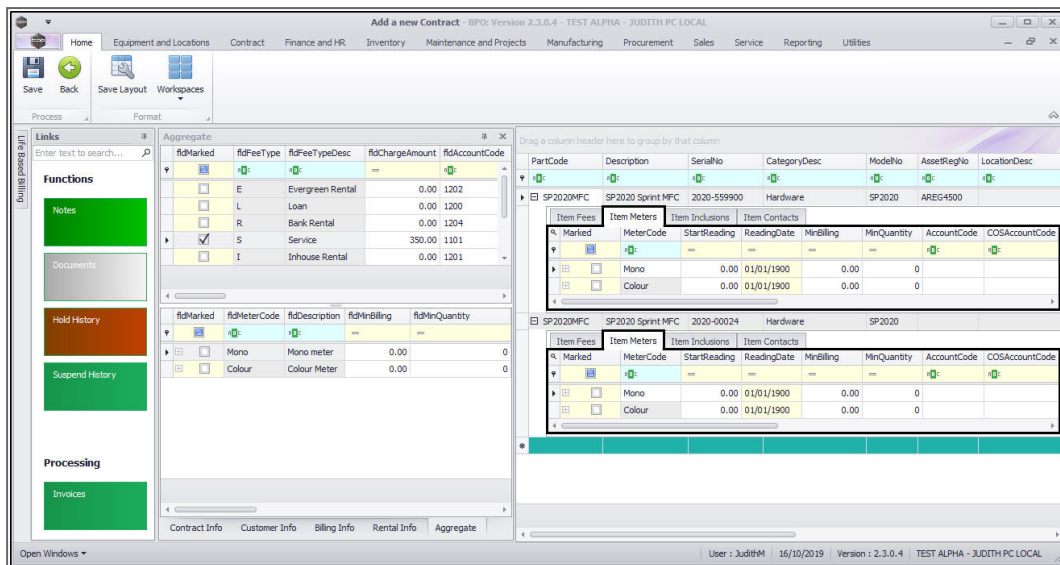
### ITEM METERS FRAME

- If you have **aggregate billing** on item meters, click on the **Item Meters** tab.

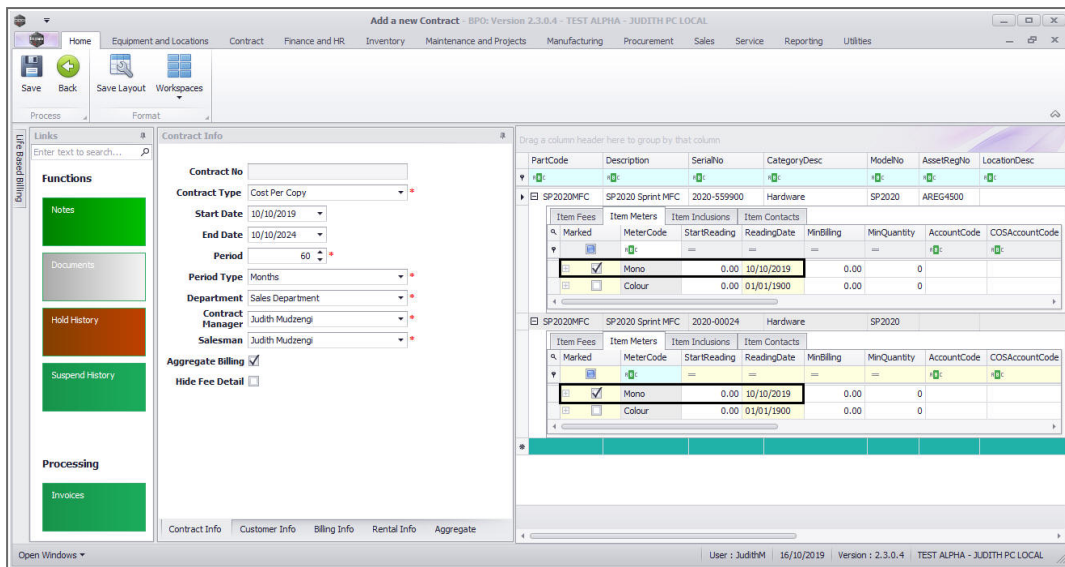


The **Item Meters** frame will be displayed.

- Note 1:** If there are no meters linked to the contract item, you can **complete** setting up the contract and link the meters and meter charges afterwards by following these 2 steps:
  - Assign meters to the contract item**
  - Add the meter charges to the contract item**
- Note 2:** To avoid linking up meters to items every time you want to add items on a contract, **link meters to the part codes** of the items. This way, when new items are received / adjusted into stores, they will already have meters linked to them. This will not apply to items that are already in stores prior to this step.

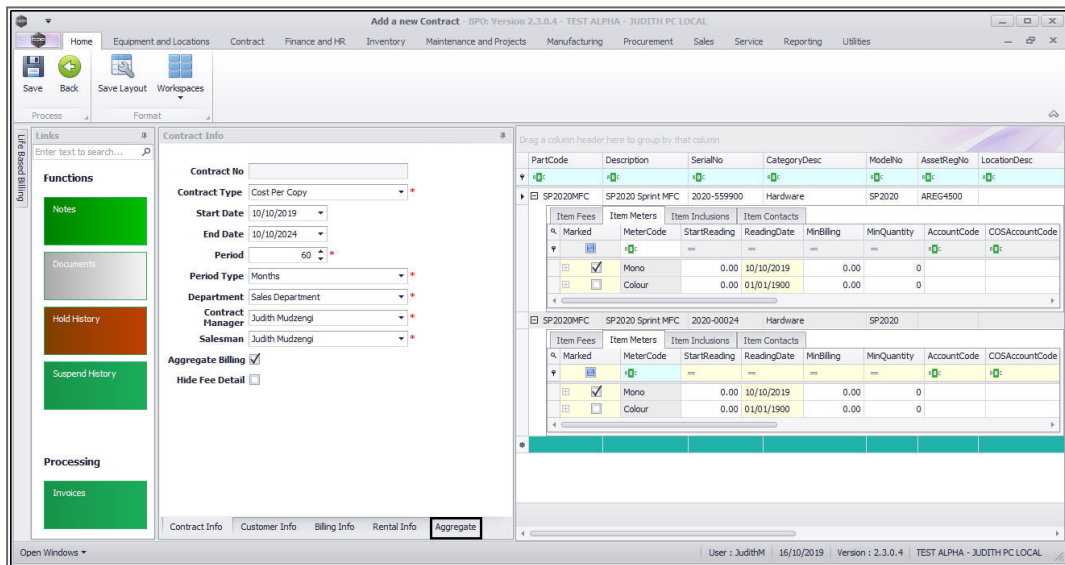


- In the **Item Meters** frame, only populate the following fields for the meters that need to be aggregate:
  - **Marked:** Select the item meters that need to be aggregate in the Item Meters tab on all contract items included in aggregate billing.eg if Mono meter is aggregate, select the Mono meter on all contract items included in aggregate billing.
  - **Start Reading:** Type in the start reading of the meter.
  - **Reading Date:** Click in this text box to display the calendar function, use this to select the reading date.



## AGGREGATE METERS SECTION

- Click on the **Aggregate** tab if this tab is closed.



- The **Aggregate** frame will be expanded and is divided into the following sections:
  - Aggregate Fees
  - Aggregate Meters

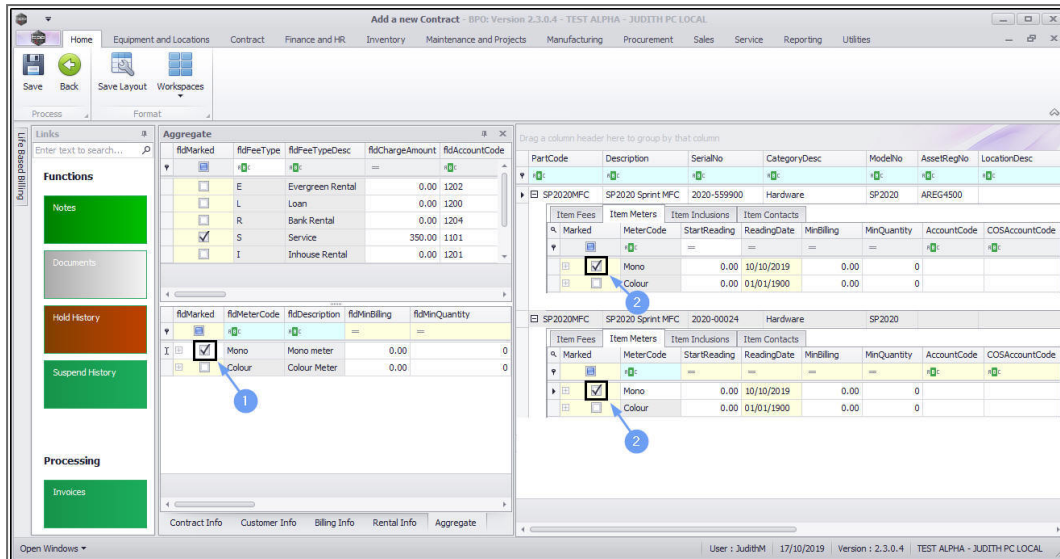


- Go to the **Aggregate Meters** section.

Populate the following fields:

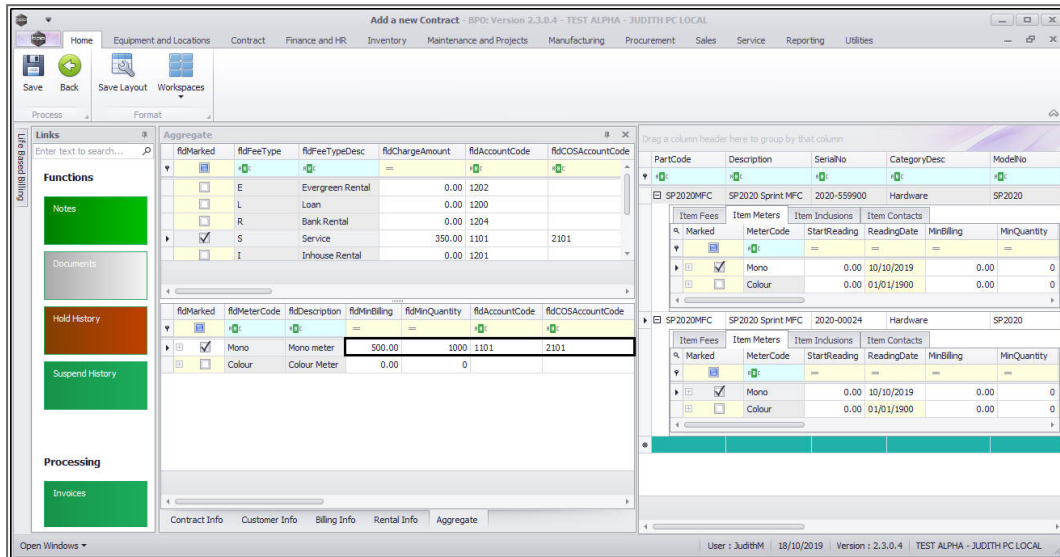
- **Marked:**
  1. Select the same meter type
  2. as you selected in the **Item Meters** frame.
  - In this image the **Mono** meter has been selected.



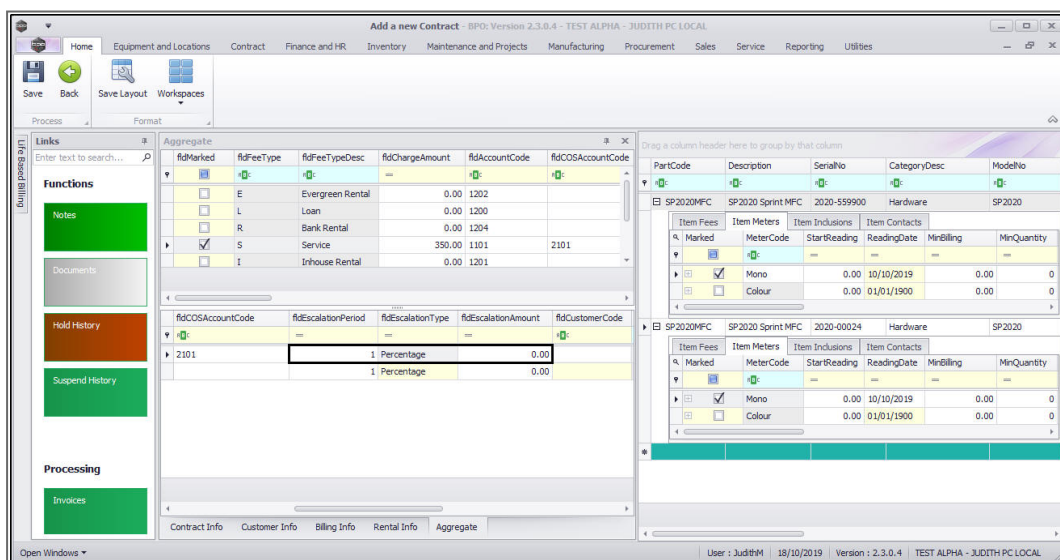


- **Min Billing:** Type in the minimum billing amount (in Rand value).
  - In this case, minimum billing is global per meter type. This means a fixed price is charged on the sum of all copies made (from 0 up to and including the Minimum Quantity) per meter type on all contract items included in aggregate billing.
  - For example - in this image, a minimum billing fee of R500 for a minimum quantity of 1000 copies on a mono meter means R500 will be charged if the sum of mono meter copies made on serial numbers - **2020-559900** and **2020-00024** is any value from 0 up to and including 1000.
  - If no minimum billing should be applied, leave the MinBilling and MinQuantity fields as 0.
  - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).
- **Min Quantity:** Type in the minimum quantity (the copies that are included in the minimum billing amount).

- **Account Code:** Type in the sales account code for these meter charges to post to.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.

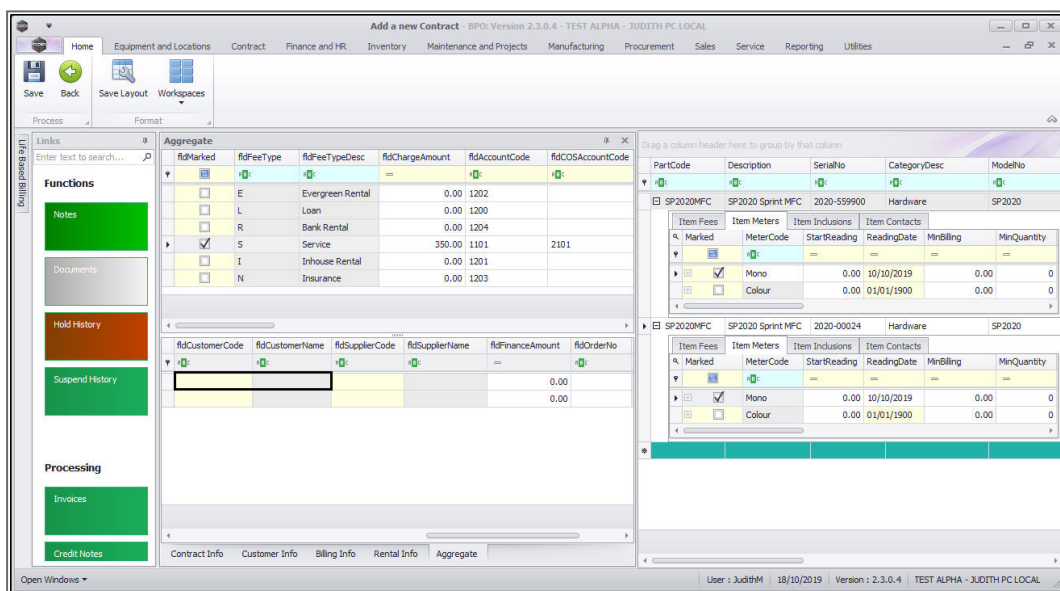


- **Escalation Period, Escalation Type and Escalation Amount:** These will auto populate, click in the text boxes and amend the details if required.



**Scroll right** until you can view the remaining columns in this frame.

- **Customer Code and Customer Name:**
  - Only populate these 2 fields if another party (a separate billing customer) is going to pay for the charges on behalf of the customer.
  - If these fields are left blank, **BPO** will bill the customer linked to the contract.
    - **Note 1:** **BPO** only supports different billing customers on an aggregate contract from **BPO v2.3.0.4**.
    - **Note 2:** Follow the next 4 screenshots **only** if you wish to link another party as the billing customer.



- **Customer Code:**
  - Click in the **Customer Code** text box.

**Add a new Contract** - BPO: Version 2.3.0.4 - TEST ALPHA - JUDITH PC LOCAL

**Functions**

- Notes
- Documents
- Hold History
- Suspend History

**Processing**

- Invoices
- Credit Notes

fdFeeType	fdFeeTypeDesc	fdChargeAmount	fdAccountCode	fdCOSAccountCode
E	Evergreen Rental	0.00	1202	
L	Loan	0.00	1200	
R	Bank Rental	0.00	1204	
S	Service	350.00	1101	2101
I	Inhouse Rental	0.00	1201	
N	Insurance	0.00	1203	

PartCode	Description	SerialNo	CategoryDesc	ModelNo
SP2020MFC	SP2020 Sprint MFC	2020-559900	Hardware	SP2020

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	MeterCode	StarReading	ReadingDate
<input checked="" type="checkbox"/>	Mono	0.00	10/10/2019
<input type="checkbox"/>	Colour	0.00	01/01/1900

Contract Info Customer Info Billing Info Rental Info Aggregate

User: JudithM 18/10/2019 Version: 2.3.0.4 TEST ALPHA - JUDITH PC LOCAL

- **Customer Code:**
  - An *Ellipsis* button will be revealed.
  - Click on this button to display the *Select a billing customer* pop up screen.

**Select a billing customer**

Home Ok Back Save Layout

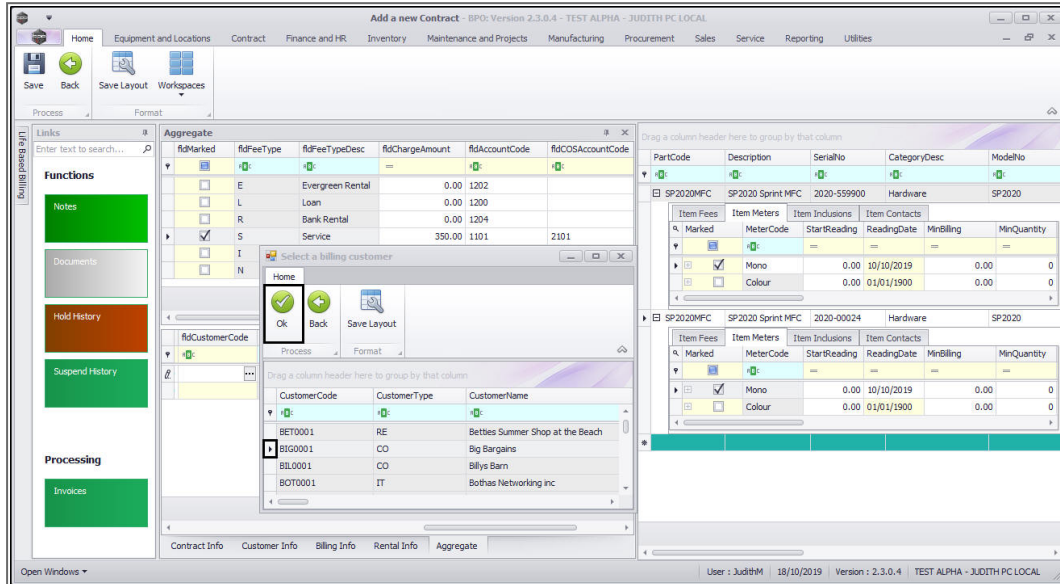
Process Format

CustomerCode	CustomerType	CustomerName	DeptName
BTG0001	CO	Big Bargains	Sales Department
STL0001	CO	Billys Barn	Sales Department
BOT0001	IT	Bothas Networking inc	Sales Department

Contract Info Customer Info Billing Info Rental Info Aggregate

User: JudithM 18/10/2019 Version: 2.3.0.4 TEST ALPHA - JUDITH PC LOCAL

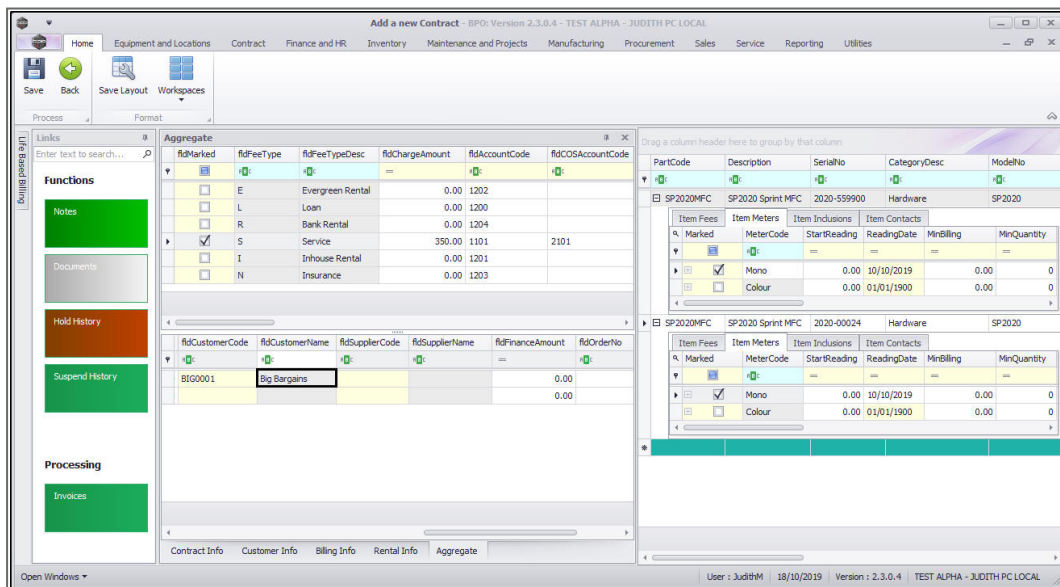
- **Customer Code:**
  - Click on the **row selector** in front of the **Billing customer** that you wish to **link** to this **contract**.
  - Click on **Ok**.



The screenshot shows the 'Add a new Contract' window with the 'Aggregate' tab selected. A 'Select a billing customer' dialog is open, displaying a list of customers. The 'Ok' button is highlighted.

CustomerCode	CustomerType	CustomerName
BET0001	RE	Bettes Summer Shop at the Beach
BIG0001	CO	Big Bargains
BIL0001	CO	Billys Barn
BOT0001	IT	Bothas Networking inc

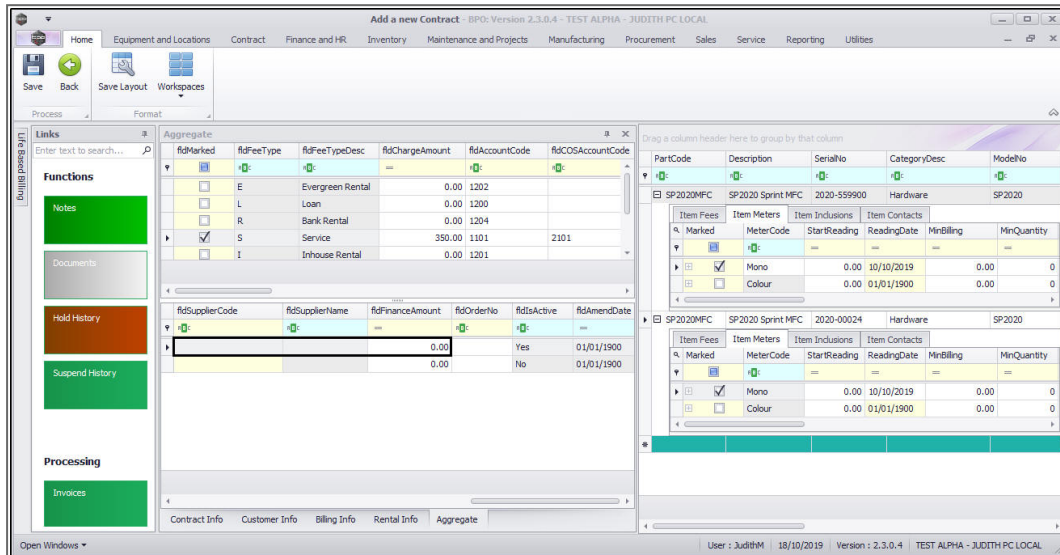
- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.



The screenshot shows the 'Add a new Contract' window with the 'Aggregate' tab selected. The 'CustomerCode' field is populated with 'BIG0001' and the 'CustomerName' field is populated with 'Big Bargains'.

fdCustomerCode	fdCustomerName	fdSupplierCode	fdSupplierName	fdFinanceAmount	fdOrderNo
BIG0001	Big Bargains			0.00	

- **Supplier Code, Supplier Name and Finance Amount:** These fields should only be populated if there is a **Back to Back Deal** with a third party who is set up in BPO as a **Supplier**. Follow the next 5 screenshots **only** if you wish to link a supplier here.

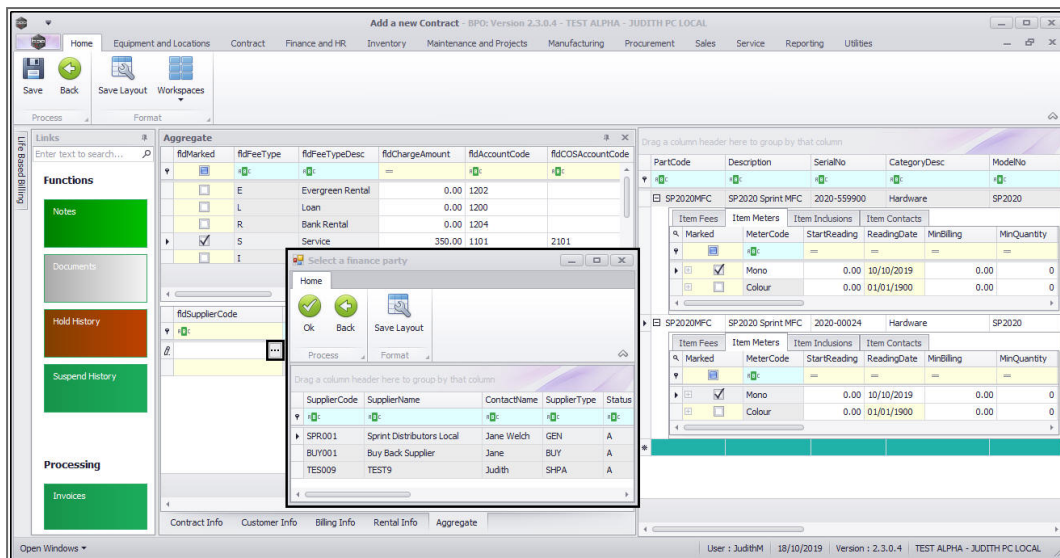


fIdMarked	fIdFeeType	fIdFeeTypeDesc	fIdChargeAmount	fIdAccountCode	fIdCOSAccountCode
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202	
<input type="checkbox"/>	L	Loan	0.00	1200	
<input type="checkbox"/>	R	Bank Rental	0.00	1204	
<input checked="" type="checkbox"/>	S	Service	350.00	1101	2101
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201	

Item Fees	Item Meters	Item Inclusions	Item Contacts	Item Billing	MinQuantity
<input checked="" type="checkbox"/>	Mono	0.00	10/10/2019	0.00	0
<input type="checkbox"/>	Colour	0.00	01/01/1900	0.00	0

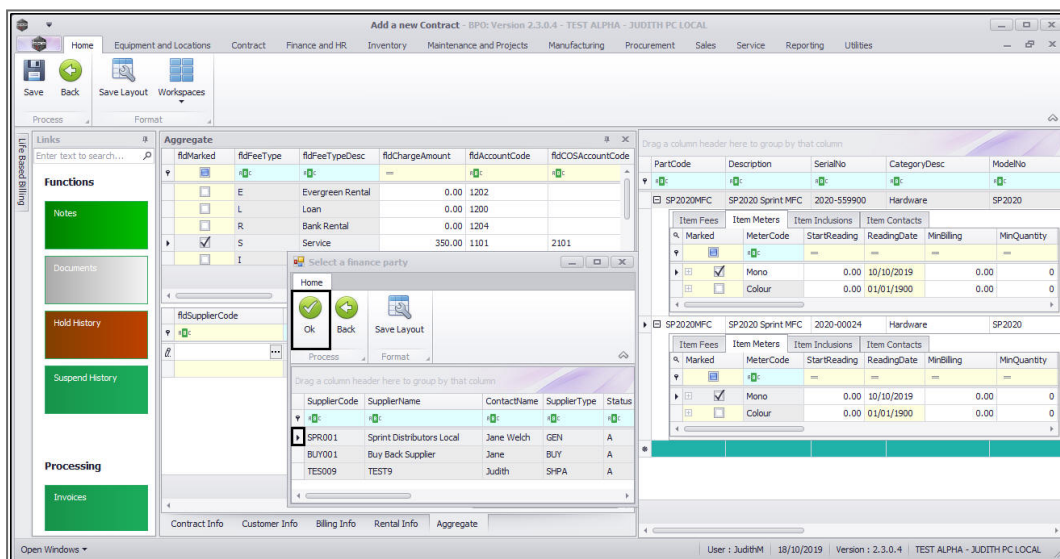
- **Supplier Code:**
  - Click on the **Supplier Code** text box to reveal an **Ellipsis** button.
  - Click on this button to display the **Select a finance party** pop up screen.





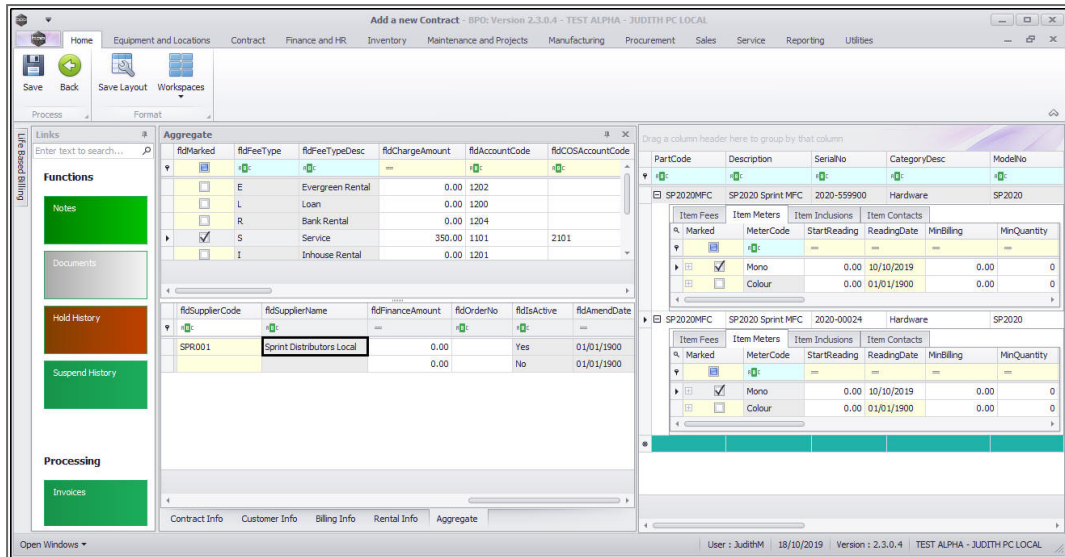
- **Supplier Code:**

- Click on the **row selector** in front of the **Supplier** that you wish to **link** to this **item meter**.
- Click on **Ok**.



- **Supplier Name:** This will auto populate once the supplier code has been selected.

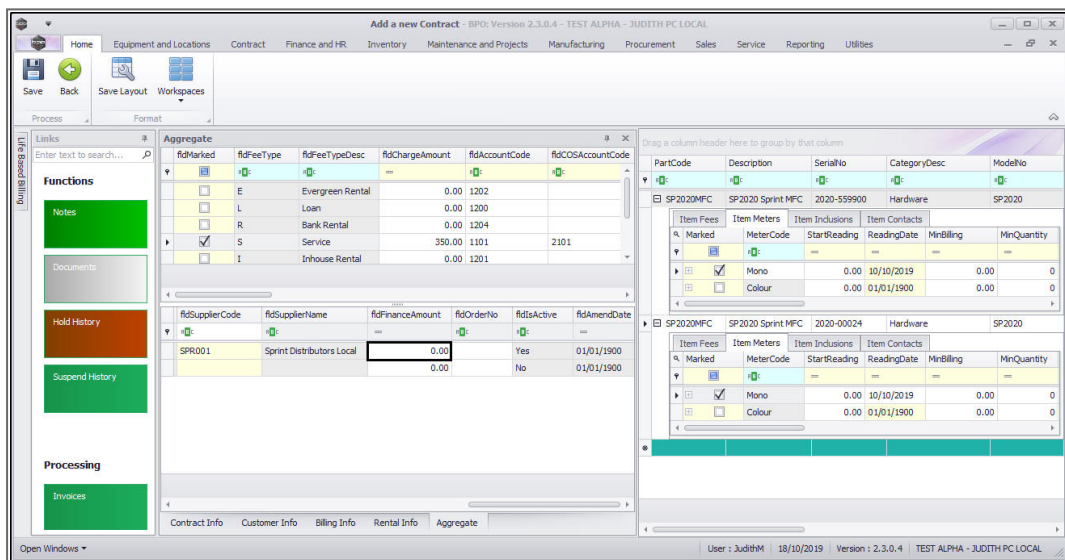




fIdMarked	fIdFeeType	fIdFeeTypeDesc	fIdChargeAmount	fIdAccountCode	fIdCOSAccountCode
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202	
<input type="checkbox"/>	L	Loan	0.00	1200	
<input type="checkbox"/>	R	Bank Rental	0.00	1204	
<input checked="" type="checkbox"/>	S	Service	350.00	1101	2101
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201	

fIdSupplierCode	fIdSupplierName	fIdFinanceAmount	fIdOrderNo	fIdIsActive	fIdAmendDate
SPR001	Sprint Distributors Local	0.00		Yes	01/01/1900
		0.00		No	01/01/1900

- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



fIdMarked	fIdFeeType	fIdFeeTypeDesc	fIdChargeAmount	fIdAccountCode	fIdCOSAccountCode
<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 checked="" type="checkbox"/>	S	Service	350.00	1101	2101
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201	

fIdSupplierCode	fIdSupplierName	fIdFinanceAmount	fIdOrderNo	fIdIsActive	fIdAmendDate
SPR001	Sprint Distributors Local	0.00		Yes	01/01/1900
		0.00		No	01/01/1900

- **Order No:** Type in a customer order number relevant to this item, if required.
- **Is Active:** This field is set to **Yes** (Active) once you have clicked on the Marked checkbox.
- **Amend Date:** This field is static.

**Add a new Contract** - BPD: Version 2.3.0.4 - 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

**Aggregate**

fdFeeType	fdFeeTypeDesc	fdChargeAmount	fdAccountCode	fdCOSAccountCode
E	Evergreen Rental	0.00	1202	
L	Loan	0.00	1200	
R	Bank Rental	0.00	1204	
S	Service	350.00	1101	2101
I	Inhouse Rental	0.00	1201	

fdSupplierCode | fdSupplierName | fdFinanceAmount | fdOrderNo | fdIsActive | fdAmendDate

fdSupplierCode	fdSupplierName	fdFinanceAmount	fdOrderNo	fdIsActive	fdAmendDate
SPR001	Sprint Distributors Local	0.00		Yes	01/01/1900
		0.00		No	01/01/1900

Contract Info | Customer Info | Billing Info | Rental Info | Aggregate

Open Windows

User: JudithM | 18/10/2019 | Version: 2.3.0.4 | TEST ALPHA - JUDITH PC LOCAL

## ADD METER LEVELS

- **Scroll left** to return to the **Marked** column.
- **Right click** in the **row** of the **item** you wish to **add a meter level** to. The item should be active (marked).
  - In this image the **Mono** meter has been selected.
- A **Process** menu will pop up.
- Click on **Add** - Add a level.

**Add a new Contract** - BPD: Version 2.3.0.4 - 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

**Aggregate**

fdFeeType	fdFeeTypeDesc	fdChargeAmount	fdAccountCode	fdCOSAccountCode
E	Evergreen Rental	0.00	1202	
L	Loan	0.00	1200	
R	Bank Rental	0.00	1204	
S	Service	350.00	1101	2101
I	Inhouse Rental	0.00	1201	

fdSupplierCode | fdSupplierName | fdFinanceAmount | fdOrderNo | fdIsActive | fdAmendDate

fdSupplierCode	fdSupplierName	fdFinanceAmount	fdOrderNo	fdIsActive	fdAmendDate
SPR001	Sprint Distributors Local	0.00		Yes	01/01/1900
		0.00		No	01/01/1900

Contract Info | Customer Info | Billing Info | Rental Info | Aggregate

Open Windows

User: JudithM | 18/10/2019 | Version: 2.3.0.4 | TEST ALPHA - JUDITH PC LOCAL

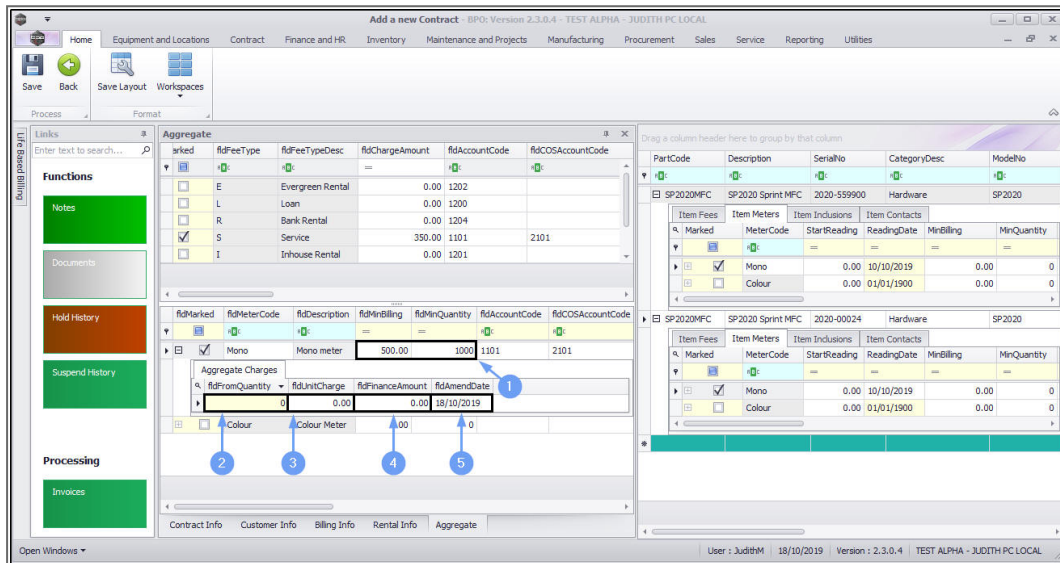
## ***Levels with Minimum Billing***

---

The ***Aggregate Charges*** frame will be expanded.

1. For this mono meter, there is a minimum billing set up of a R500 charge for the first combined 1000 copies (Minimum Quantity) made on all contract items included in aggregate billing. BPO calculates the usage charges by first calculating the minimum billing set up.
  - In this example, it means in BPO, a fixed charge of R500 will be charged for any number of mono copies made across all machines (total usage) included in aggregate billing from 0 up to and including 1000, thereafter a unit charge per copy will be applied i.e., from 1001.
2. **From Quantity:** This is the number from which the unit charge will be effective.
  - The first row in the ***Meter Charges matrix***, is static at 0. This means if there is minimum billing set up on the meter, the ***first*** row looks incorrect as the ***From Quantity*** field is static at 0.
  - If there is minimum billing set up on the meter, ***BPO*** does not read the ***From Quantity*** in the first row as 0 (although it displays as 0) but starts counting from (***Minimum Quantity + 1***). In this case, since (minimum billing level) is up to and including 1000, ***BPO*** will start counting from 1001.
  - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).

3. **Unit Charge:** Type in the unit charge for the meter (charge per copy when Minimum Quantity is exceeded).
4. **Finance Amount:** This should only be populated if there is a **Back to Back Deal** with a third party who is set up on **BPO** as a **Supplier**.
5. **Amend Date:** This is a static field.



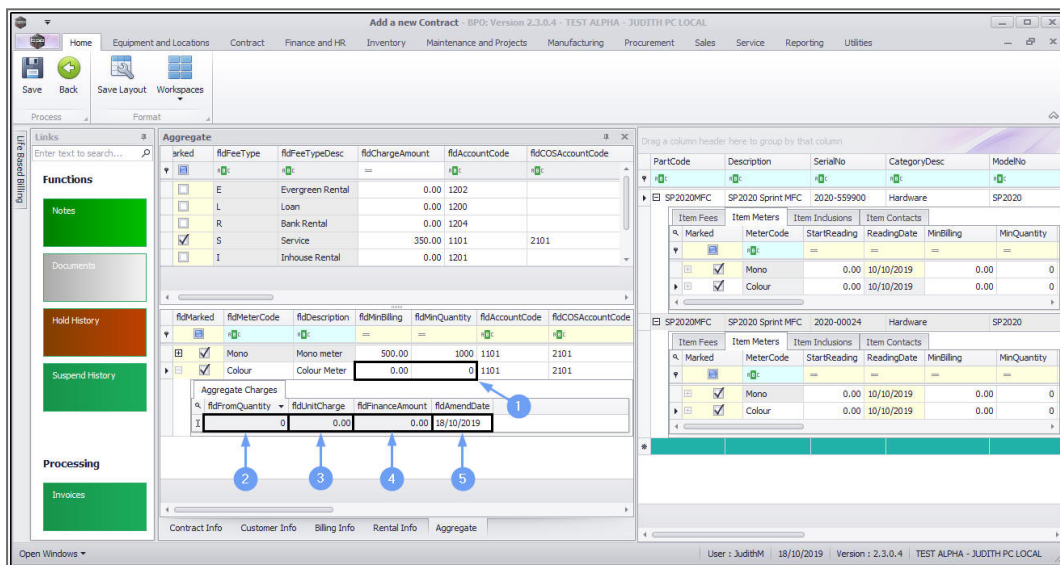
The screenshot shows the 'Add a new Contract' window in the CO3 Technologies software. The 'Aggregate' tab is selected, showing a table of contract items. The 'Aggregate Charges' section is expanded, showing fields for 'Unit Charge', 'Finance Amount', and 'Amend Date'. Numbered callouts 1 through 5 point to these fields: 1 points to 'Amend Date', 2 points to 'Unit Charge', 3 points to 'Unit Charge', 4 points to 'Finance Amount', and 5 points to 'Amend Date'.

- You can add **additional charge levels**.

## Levels with no Minimum Billing

- The **Aggregate Charges** frame will be expanded.
    - **Note:** The **Colour** meter will be used as an example.
1. There is no minimum billing set up on this meter. This means the usage calculation will only be based on what's set up in the **Aggregate Charges** matrix.
  2. **From Quantity:** This is the number from which the unit charge will be effective.

- The first row in the **Meter Charges** matrix, is static at 0.
  - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).
3. **Unit Charge:** Type in the unit charge for the meter (charge per copy).
  4. **Finance Amount:** This should only be populated if there is a **Back to Back Deal** with a third party who is set up in **BPO** as **Supplier**.
  5. **Finance Amount:** This field cannot be edited.



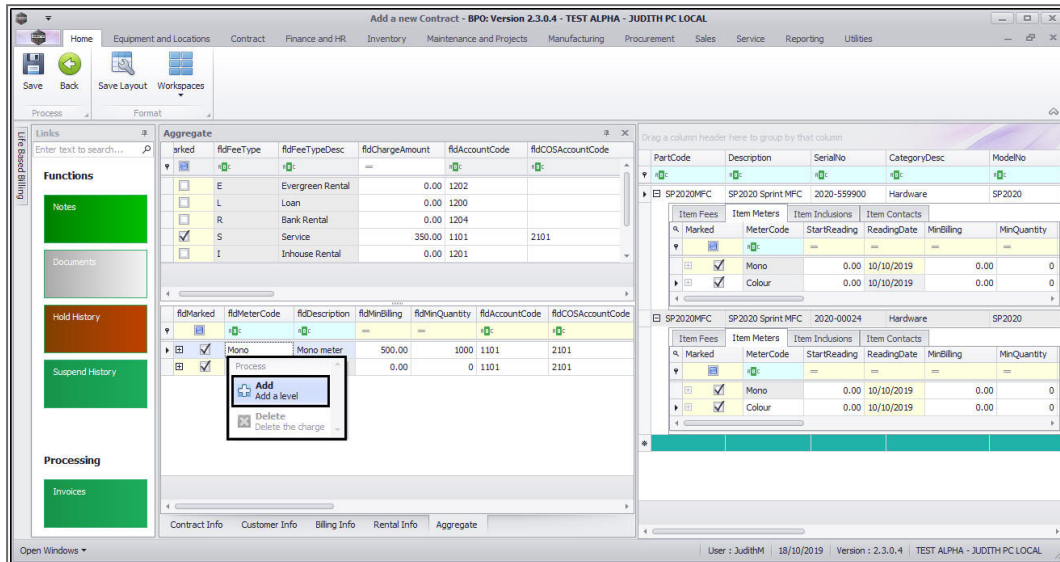
- You can add **additional charge levels**.

## Link Additional Levels

- **Right click** anywhere in the **row** of the **item** that you wish to add **another meter level** to. (You can do this whilst the aggregate charges matrix is open / closed).

- **Note:** The **Mono** meter will be used as an example.

- The **Process** menu will pop up again.
- Click on **Add** - Add a level.

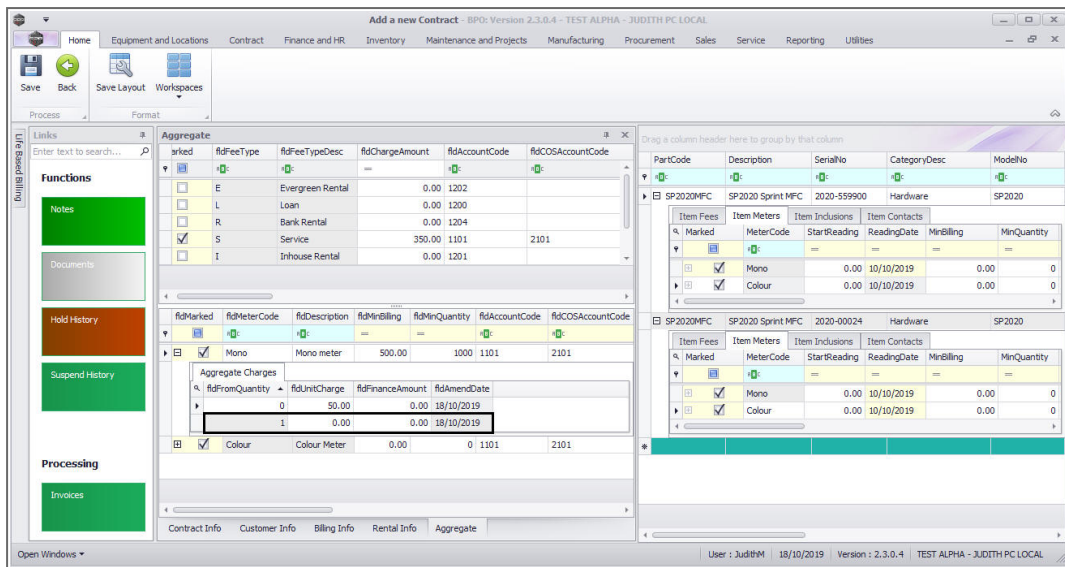


A **second level** has now been added to the **Aggregate Charges** matrix.

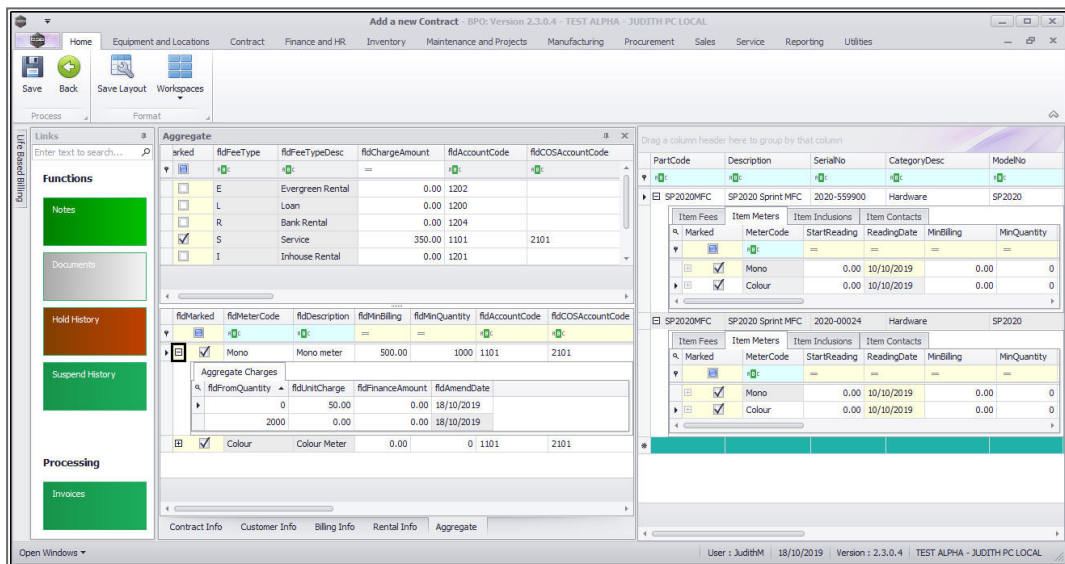
- **From Quantity:** Type in or use the arrow indicators to select the number of copies from which this charge will be effective.
  - For a more detailed explanation, read this **important note on Minimum Billing and Meter Charge Setup**.
- **Unit Charge:** Type in or use the arrow indicators to select the unit charge for this additional meter (charge per copy). This charge will usually increase with each new level.
- **Finance Amount:** This should only be populated if there is a **Back to Back Deal** with a third party who is set up in **BPO** as a **Supplier**.
- **Amend Date:** This field cannot be edited.

Repeat this process to add more meter charges, as required.





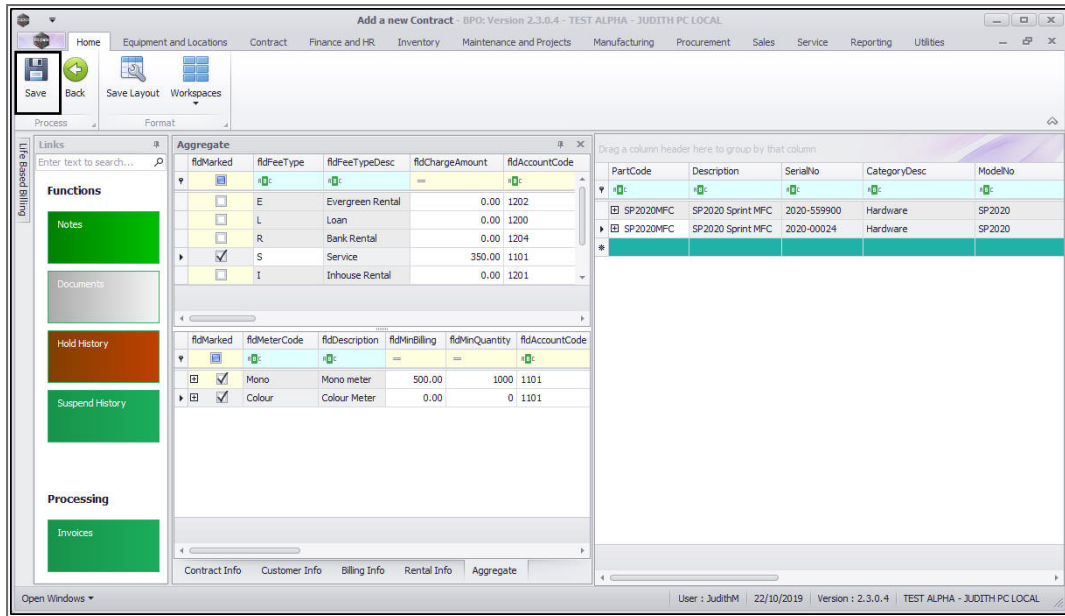
- When you have finished working in the **Aggregate Charges** frame, collapse the frame.



## SAVE THE CONTRACT

- Add **contract inclusions** if applicable and **item contacts**.
- When you are finished, click on **Save**.





**Add a new Contract** - BPO: Version 2.3.0.4 - 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

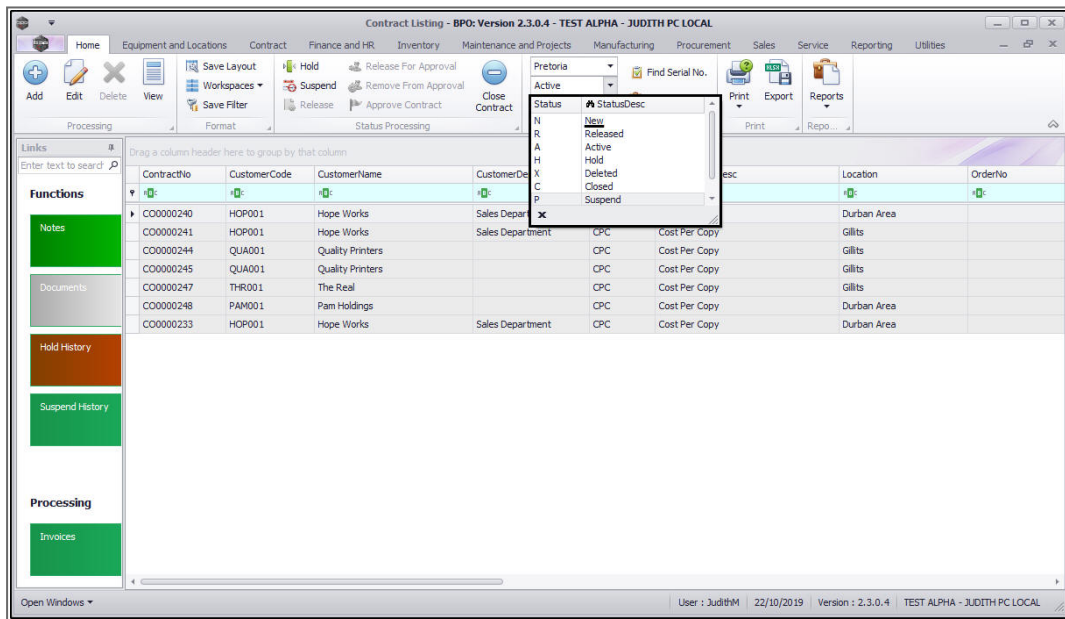
fdMarked	fdFeeType	fdFeeTypeDesc	fdChargeAmount	fdAccountCode
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202
<input type="checkbox"/>	L	Loan	0.00	1200
<input type="checkbox"/>	R	Bank Rental	0.00	1204
<input checked="" type="checkbox"/>	S	Service	350.00	1101
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201

fdMarked	fdMeterCode	fdDescription	fdMinBilling	fdMinQuantity	fdAccountCode
<input checked="" type="checkbox"/>	Mono	Mono meter	500.00	1000	1101
<input checked="" type="checkbox"/>	Colour	Colour Meter	0.00	0	1101

Contract Info | Customer Info | Billing Info | Rental Info | Aggregate

User: JudithM | 22/10/2019 | Version: 2.3.0.4 | TEST ALPHA - JUDITH PC LOCAL

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



**Contract Listing** - BPO: Version 2.3.0.4 - 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 | Release For Approval | Remove From Approval | Approve Contract | Close Contract

Processing | Format | Status Processing

Links: Enter text to search...

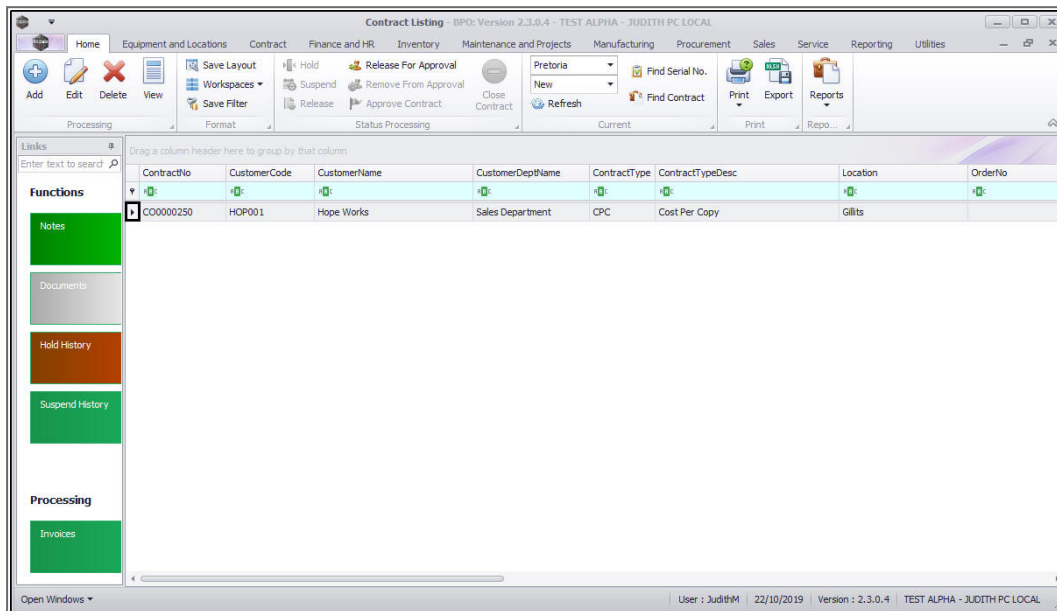
Functions: Notes, Documents, Hold History, Suspend History, Processing, Invoices

ContractNo	CustomerCode	CustomerName	CustomerDe	Location	OrderNo
CO0000240	HOP001	Hope Works	Sales Depart	Durban Area	
CO0000241	HOP001	Hope Works	Sales Department	Gillits	
CO0000244	QUA001	Quality Printers		Gillits	
CO0000245	QUA001	Quality Printers		Gillits	
CO0000247	THR001	The Real		Gillits	
CO0000248	PAM001	Pam Holdings		Durban Area	
CO0000233	HOP001	Hope Works	Sales Department	Durban Area	

Status: Active (Dropdown menu open showing: New, Released, Active, Hold, Deleted, Closed, Suspend)

User: JudithM | 22/10/2019 | Version: 2.3.0.4 | 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 then **Approved** before it becomes active.



## EXAMPLES OF AGGREGATE BILLING CONTRACTS

Below are different scenarios of **Aggregate** contracts. These scenarios are not exhaustive.

### Example 1:

A contract with aggregate fees and aggregate meters.

- **Service Fee:** R450

This will bill a total R450 in total, but this charge will be linked to the contract and not to items on the contract.

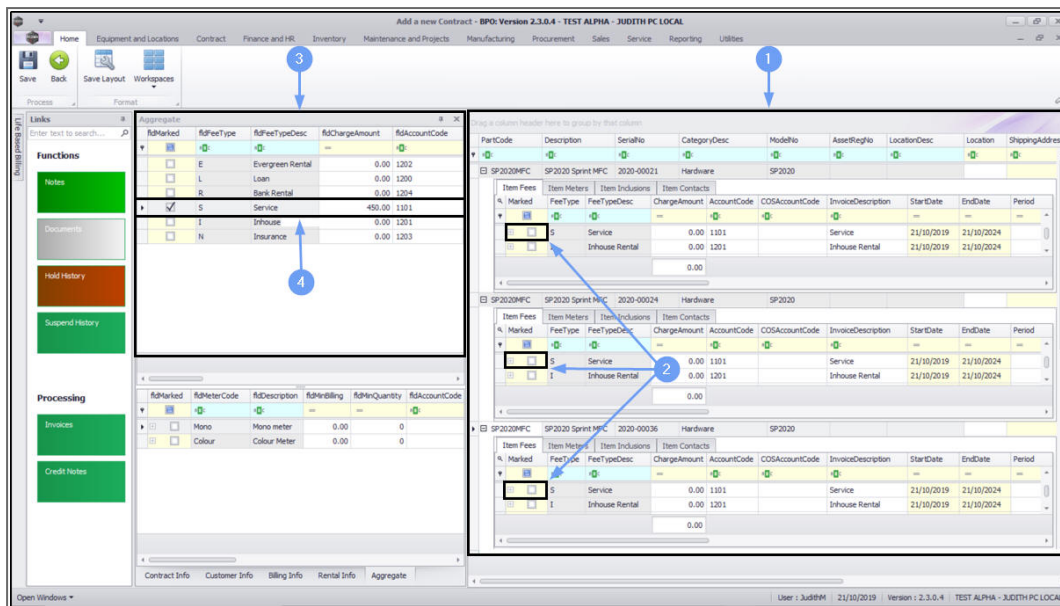
- **Mono Meter:**

- **Min Billing:** R500 (for all three machines)
- **Min Quantity:** 3000 copies (across all three machines)
- **Copy Charge:** 5c after total usage of 3000 (across all 3 machines)
- **Colour Meter:**
  - No **Min Billing**
  - **Copy Charge:** 10c

The configuration will be as below:

### Item Fees

1. **Right side** of the screen - **Items Fees** Frame
  2. Serial No: **2020-00021** - nothing is selected in the Item Fees frame.
  2. Serial No: **2020-00024** - nothing is selected in the Item Fees frame.
  2. Serial No: **2020-00036** - nothing is selected in the Item Fees frame.
3. **Left side** of the screen - **Aggregate Fees** Frame
  4. The **Service** Fee is selected and set up in the **Aggregate Fees** section as explained in this manual.



## Item Meters

1. **Right side** of the screen - **Items Fees** Frame
  2. Serial No: **2020-00021** - the mono and colour meters are selected. For both meters, only the Start Reading and Reading Date fields are updated.
  2. Serial No: **2020-00024** - the mono and colour meters are selected. For both meters, only the Start Reading and Reading Date fields are updated.
  2. Serial No: **2020-00036** - the mono and colour meters are selected. For both meters, only the Start Reading and Reading Date fields are updated.
3. **Left side** of the screen - **Aggregate Meters** Frame
  4. **Mono Meter**
    5. **Min Billing:** R500, **Min Qty:** 3000
    6. **Copy Charge:** 5c
  7. **Colour Meter**
    8. **Min Billing:** 0, **Min Qty:** 0

## 9. Copy Charge: 10c

- The remaining fields are set up as explained in this manual.

### Example 2:

A contract with non-aggregate fees and aggregate meters.

- Service Fee:**
  - Serial No: **2020-00021** the charge is R150
  - Serial No: **2020-00024** the charge is R170
  - Serial No: **2020-00036** the charge is R130

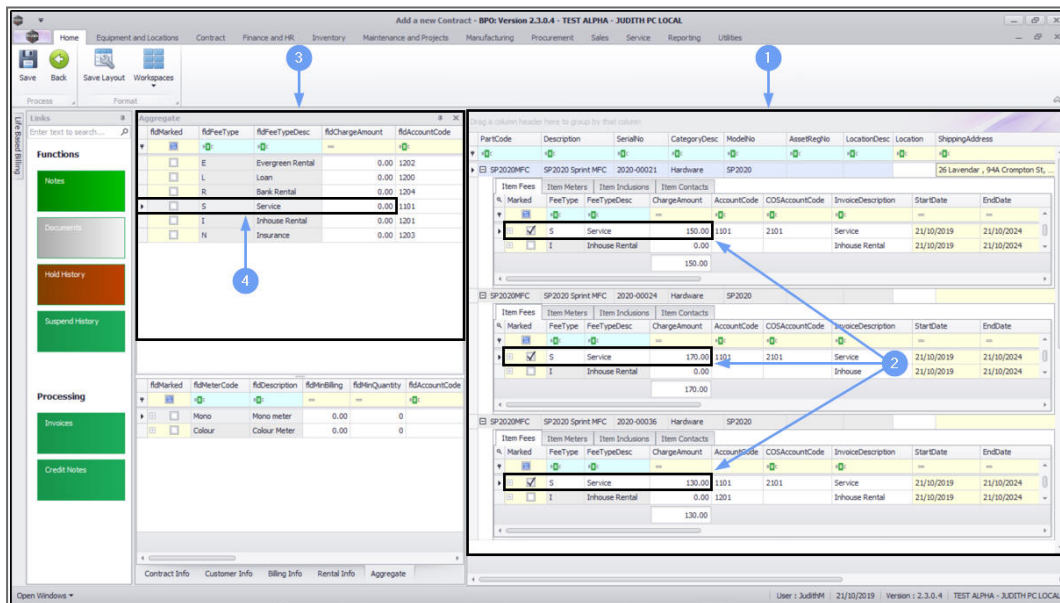
This will bill R450 in total, but this charge will be split per machine.
- Mono Meter:**
  - Min Billing:** R500 (for all three machines)
  - Min Quantity:** 3000 copies (across all three machines)
  - Copy Charge:** 5c after total usage of 3000 (across all 3 machines)
- Colour Meter:**

- No Min Billing
- Copy Charge: 10c

The configuration will be as below:

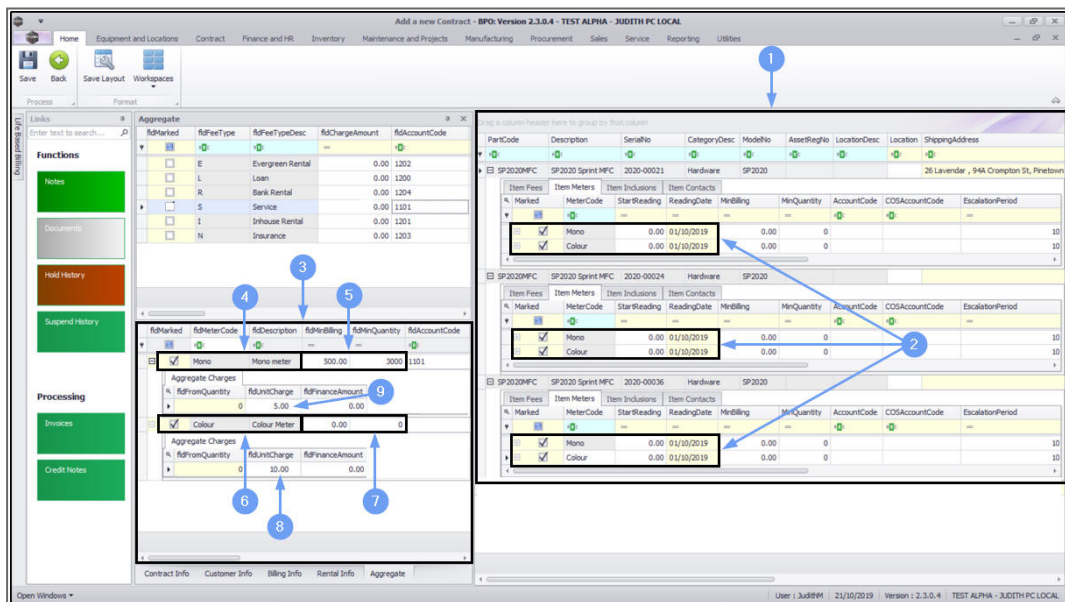
## Item Fees

1. **Right side** of the screen - **Items Fees** Frame
  2. Serial No: **2020-00021** - the Service fee is selected with a charge of R150 in the Item Fees frame.
  2. Serial No: **2020-00024** - the Service fee is selected with a charge of R170 in the Item Fees frame.
  2. Serial No: **2020-00036** - the Service fee is selected with a charge of R130 in the Item Fees frame.
  - The remaining fields are set up as explained in this manual.
3. **Left side** of the screen - **Aggregate Fees** Frame
  4. The **Service** Fee is not selected and set up in the **Aggregate Fees** section since the fee is non aggregate.



## Item Meters

1. **Right side** of the screen - **Items Fees** Frame
  2. Serial No: **2020-00021** - the mono and colour meters are selected. For both meters, only the Start Reading and Reading Date fields are updated.
  2. Serial No: **2020-00024** - the mono and colour meters are selected. For both meters, only the Start Reading and Reading Date fields are updated.
  2. Serial No: **2020-00036** - the mono and colour meters are selected. For both meters, only the Start Reading and Reading Date fields are updated.
3. **Left side** of the screen - **Aggregate Meters** Frame
  4. **Mono Meter**
    5. **Min Billing:** R500, **Min Qty:** 3000
    6. **Copy Charge:** 5c
  7. **Colour Meter**
    8. **Min Billing:** 0, **Min Qty:** 0
    9. **Copy Charge:** 10c
  - The remaining fields are set up as explained in this manual.





## Example 3:

A contract with no fees, aggregate mono meters and non-aggregate colour meters.

Serial No: **2020-00024**

- No Min Billing
- **Copy Charge: 15c**  
Serial No: **2020-00036**

- No Min Billing
- **Copy Charge: 10c**

The configuration will be as below:

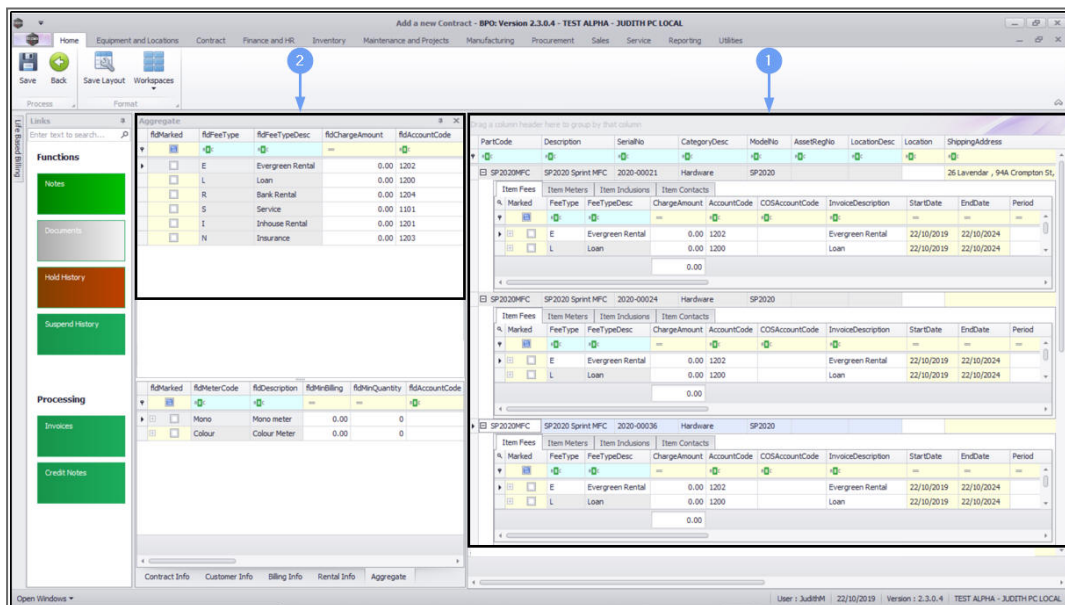
## Item Fees

### 1. **Right side** of the screen - **Items Fees** Frame

- No fee will be selected since the contract has no fees.

### 2. **Left side** of the screen - **Aggregate Fees** Frame

- No fee will be selected since the contract has no fees.



## Item Meters

## 1. *Right side* of the screen - *Items Fees* Frame

### *Mono* Meter: *Aggregate*

2. Serial No: **2020-00021** - The mono meter is selected and the Start Reading and Reading Date are the only fields that have been updated.
2. Serial No: **2020-00024** - The mono meter is selected and the Start Reading and Reading Date are the only fields that have been updated.
2. Serial No: **2020-00036** - The mono meter is selected and the Start Reading and Reading Date are the only fields that have been updated.

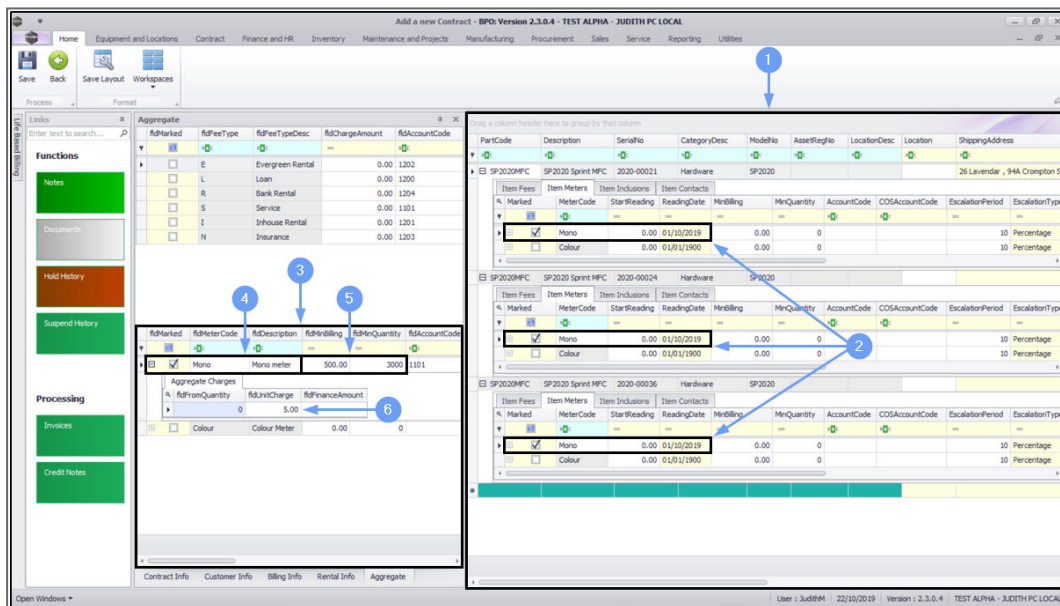
## 3. *Left side* of the screen - *Aggregate Meters* Frame

### 4. Mono Meter

5. **Min Billing:** R500, **Min Qty:** 3000

6. **Copy Charge:** 5c

- The remaining fields are set up as explained in this manual.



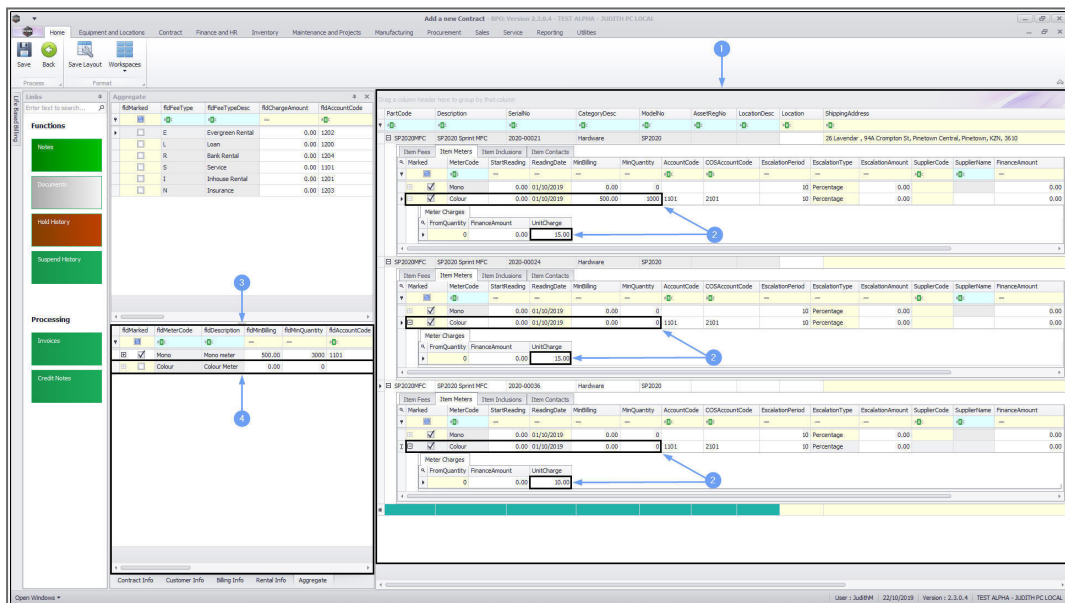
## 1. *Right side* of the screen - *Items Meters* Frame

### *Colour* Meter: *Non Aggregate*

2. Serial No: **2020-00021** - The colour meter is selected with a Minimum Billing of R500, Minimum Quantity of 1 000 and a Copy Charge of 15c set up. For more information, refer to [creating a new contract](#) manual.
  2. Serial No: **2020-00024** - The colour meter is selected with no Minimum Billing and a Copy Charge of 15c set up. For more information, [creating a new contract](#) manual.
  2. Serial No: **2020-00036** - The colour meter is selected with no Minimum Billing and a Copy Charge of 10c set up. For more information, refer to [creating a new contract](#) manual.
- The other fields are set up as outlined in [creating a new contract](#) manual.

### 3. **Left side** of the screen - **Aggregate Meters** Frame

4. The colour meter is not selected or set up here because it is non-aggregate.



MNU.112.055

