

CONTRACT

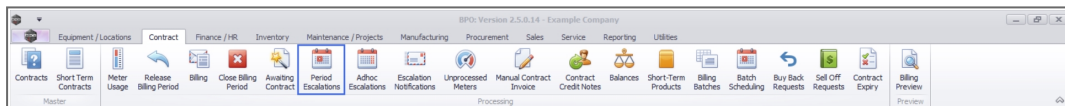
PERIOD ESCALATIONS

Period Escalations are run on a monthly basis during the month end billing run.

Escalation period and amount is determined by the contract item fee / meter setup details.

You will run escalations for the **upcoming** month, at the **end** of the current month.

Ribbon Select *Contract > Period Escalations*



The **Period Escalation Processing** screen will be displayed.

Upon opening, this processing screen displays a list of contract billing periods with processing and count columns for Fee and Meter charges.

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout

Process... Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	No	No	0	0
May	2022	No	No	2	2
June	2022	No	No	2	9
July	2022	No	No	4	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	4	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

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VIEW FEES AND METERS

Fees and Meters will be marked as follows:

1. **Green** - Financial Months that have been processed.
2. **Yellow** - Available Financial Month yet to process.
3. **Red** - Unprocessed Financial Months that cannot be processed yet.

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

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Back Save Layout

Process... Format

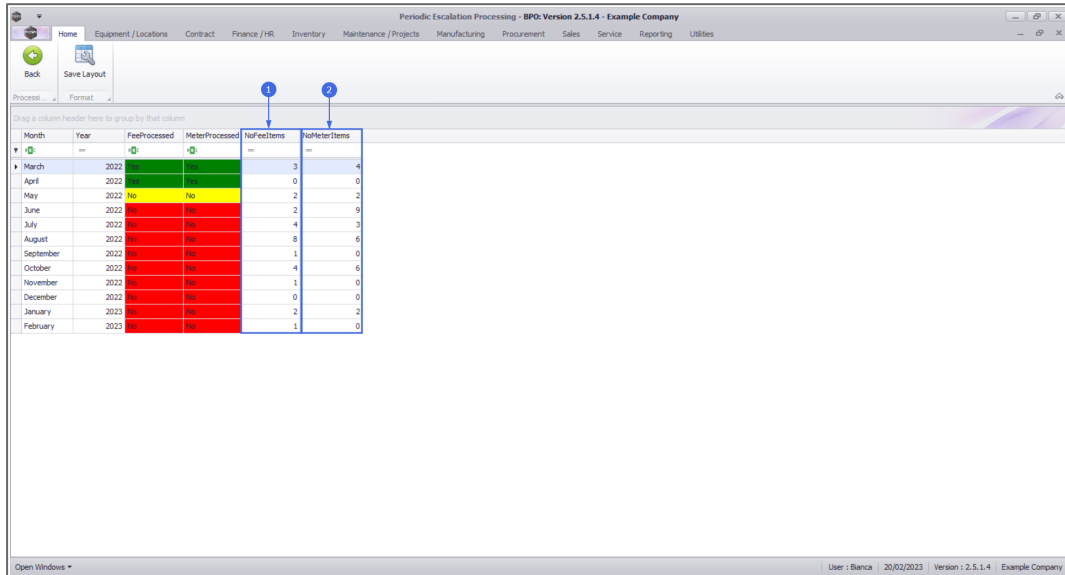
Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	No	No	0	0
May	2022	No	No	2	2
June	2022	No	No	2	9
July	2022	No	No	4	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	4	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

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1. The **No Fee Items** column will show you the number of contract item **fees** that are to be escalated in the relevant billing period.
2. The **No Meter Items** column will show you the number of contract item **meters** that are to be escalated in the relevant billing period.



FEE PROCESSING

- Double click on the **available** processing period for **Fee Processed** (i.e. the yellow **No** text box in the **Fee Processed** column).

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout

Process... Format

Drop a column header here to group by that column

Month	Year	FeesProcessed	MeterProcessed	NoFeesItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	No	No	0	0
May	2022	No	No	2	2
June	2022	No	No	2	9
July	2022	No	No	4	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	4	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

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The 'Period Escalations' for Fees screen

The **Period Escalations** (for fees) screen will be displayed. This screen is divided into **4** frames:

1. **Contract Types to be escalated.**
2. **Fee Types to be escalated.**
3. **Contracts to be escalated.**
4. **Contract Items Charges** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.

Period Escalations - BPO: Version 2.5.1.4 - Example Company

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Contract Types to be escalated

Marked	ContractType	ContractTypeDesc	ExcludeFrom	ShortTerm	DefEscPerc	DefEscType
<input checked="" type="checkbox"/>	CPC	Cost Per Copy	No	No	10.00	P
<input checked="" type="checkbox"/>	PFE	Prepaid Contract	No	No	10.00	P

1

Fee Types to be escalated

Marked	Code	CodeDescription
<input checked="" type="checkbox"/>	RBN	Standard Rentals
<input checked="" type="checkbox"/>	W	Review Fee
<input checked="" type="checkbox"/>	I	Inhouse Rental
<input checked="" type="checkbox"/>	N	Insurance
<input checked="" type="checkbox"/>	R	Bank Rental
<input checked="" type="checkbox"/>	S	Service
<input checked="" type="checkbox"/>	E	Evergreen Rental

2

Contracts to be escalated

Drag a column header here to group by that column

Marked	ContractNo	CustomerName	CustomerCode	ContractTypeDesc	Class
<input checked="" type="checkbox"/>	C00000080	Office Supplies Unlimited	OFF001	Cost Per Copy	

3

Escalations

Drag a column header here to group by that column

Escalation	FeeTypeDesc	Type	ContractNo	CustomerName	Amount	Increase	NewAmount	ContractTypeDesc	CustomerCode	
<input checked="" type="checkbox"/>	No	Service	PFE	C00000080	Office Supplies Unl...	605.000	60.500	665.500	Cost Per Copy	OFF001
<input checked="" type="checkbox"/>	No	Service	PFE	C00000080	Office Supplies Unl...	525.000	26.250	551.250	Cost Per Copy	OFF001

4

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1,130.0086.751,216.75

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User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

Contract **Class** and **Category**, as defined on the contract, can be useful when filtering for contracts that you need to escalate.

¹ BPO2 v2.5.0.8 or higher. " Add Interest Rate " on page 2

Period Escalations - BPO: Version 2.5.1.4 - Example Company

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Contract Types to be escalated

Marked	ContractType	ContractTypeDesc	ExcludeFro	ShortTerm	DeEscPerc	DeEscType	Status
<input checked="" type="checkbox"/>	CPC	Cost Per Copy	No	No	10.00	P	A
<input checked="" type="checkbox"/>	PRE	Prepaid Contract	No	No	10.00	P	A
<input checked="" type="checkbox"/>	REN	Rental Contracts	Yes	No	No	12.00	P

Fee Types to be escalated

Marked	Code	CodeDescription
<input checked="" type="checkbox"/>	MINBILLING	Minimum Billing Charge
<input checked="" type="checkbox"/>	UNITCHARGE	Unit Charge

Contracts to be escalated

Drag a column header here to group by that column

Marked	ContractNo	CustomerName	CustomerCode	ContractTypeDesc	Class	Category
<input checked="" type="checkbox"/>	CO0000016	Titan Group	TA0001	Rental Contracts	Class1	Category2
<input checked="" type="checkbox"/>	CO0000018	Samanthas Diner	SAM001	Cost Per Copy	Class1	Category3
<input checked="" type="checkbox"/>	CO0000019	Office Supplies Unlimited	OFF001	Cost Per Copy	Class2	Category3
<input checked="" type="checkbox"/>	CO0000031	Young Electric	YES001	Cost Per Copy	Class3	Category1
<input checked="" type="checkbox"/>	CO0000043	Hope Works (Pty) Ltd	HOP001	Cost Per Copy	Class3	Category1
<input checked="" type="checkbox"/>	CO0000072	Hope Works (Pty) Ltd	HOP001	Cost Per Copy	Class3	Category1
<input checked="" type="checkbox"/>	CO0000074	Derton / Technologies	DER001	Cost Per Copy	Class2	Category3
<input checked="" type="checkbox"/>	CO0000077	Pink Shoes	PIN0001	Cost Per Copy	Class2	Category3

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Mark Items to be Escalated

- You can use the **Marked** check boxes to select the **Contract Types**, **Fee Types**, **Contracts** and **Contracts Items** that you wish to escalate.

Period Escalations - BPO: Version 2.5.1.4 - Example Company

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Contract Types to be escalated

Marked	ContractType	ContractTypeDesc	ExcludeFro	ShortTerm	DeEscPerc	DeEscType
<input checked="" type="checkbox"/>	CPC	Cost Per Copy	No	No	10.00	P
<input checked="" type="checkbox"/>	PRE	Prepaid Contract	No	No	10.00	P

Fee Types to be escalated

Marked	Code	CodeDescription
<input checked="" type="checkbox"/>	REN	Standard Rentals
<input checked="" type="checkbox"/>	W	Renew Fee
<input checked="" type="checkbox"/>	I	Insurance Rental
<input checked="" type="checkbox"/>	N	Insurance
<input checked="" type="checkbox"/>	R	Bank Rental
<input checked="" type="checkbox"/>	S	Service
<input checked="" type="checkbox"/>	E	Evergreen Rental

Contracts to be escalated

Drag a column header here to group by that column

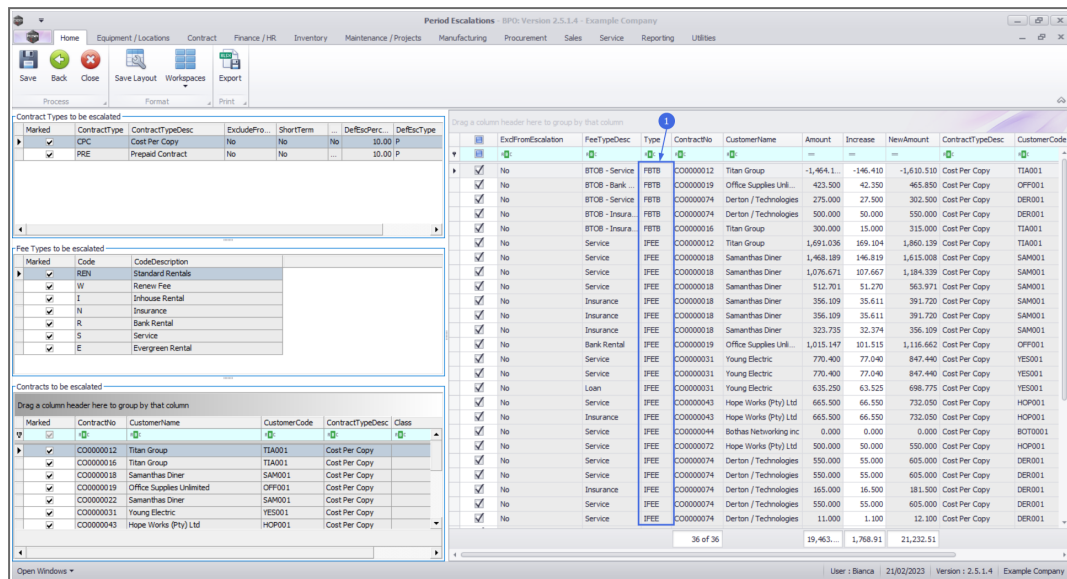
Marked	ContractNo	CustomerName	CustomerCode	ContractTypeDesc	Class
<input checked="" type="checkbox"/>	CO0000012	Titan Group	TA0001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000016	Titan Group	TA0001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000018	Samanthas Diner	SAM001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000019	Office Supplies Unlimited	OFF001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000022	Samanthas Diner	SAM001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000031	Young Electric	YES001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000043	Hope Works (Pty) Ltd	HOP001	Cost Per Copy	

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- Each contract item meter charge will be listed individually, as follows:

- **Item Fee (IFEE)**
- **Item Fee Back to Back (FBTB)**



The screenshot displays the 'Period Escalations' software interface. On the left, there are three panels: 'Contract Types to be escalated', 'Fee Types to be escalated', and 'Contracts to be escalated'. The main area on the right contains a large table with columns: EndOfFromEscalation, FeeTypeDesc, Type, ContractNo, CustomerName, Amount, Increase, NewAmount, ContractTypeDesc, and CustomerCode. A blue circle with the number '1' highlights the 'Amount' column header. The table lists various contracts and their associated fees, including items like 'Titan Group', 'Office Supplies Unlimited', 'Samanthas Diner', and 'Young Electric'.

In the Linked Contract Item Charges Listing frame, look at the **Amount**, **Increase** and **New Amount** columns.

- **Amount:** This is the amount of the fee that is being charged.
- **Increase:** This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a **Percentage** or a **Flat Amount**).
 - In this image, the amount already set up on the system is a 10% escalation.
- **New Amount:** This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

Review these amounts to make sure they are correct, individual changes to the **Increase** amount can be made if required.

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Contract Types to be escalated

Marked	ContractType	ContractTypeDesc	ExcludeFromEscalation	ShortTerm	DeEscPerc	DeEscType
<input checked="" type="checkbox"/>	CPC	Cost Per Copy	No	No	No	10.00 P
<input checked="" type="checkbox"/>	PRE	Prepaid Contract	No	No	No	10.00 P

Fee Types to be escalated

Marked	Code	CodeDescription
<input checked="" type="checkbox"/>	REN	Standard Rentals
<input checked="" type="checkbox"/>	W	Renew Fee
<input checked="" type="checkbox"/>	I	Inhouse Rental
<input checked="" type="checkbox"/>	N	Insurance
<input checked="" type="checkbox"/>	R	Bank Rental
<input checked="" type="checkbox"/>	S	Service
<input checked="" type="checkbox"/>	E	Evergreen Rental

Contracts to be escalated

Drag a column header here to group by that column

Marked	ContractNo	CustomerName	CustomerCode	ContractTypeDesc	Class
<input checked="" type="checkbox"/>	CO0000012	Titan Group	TA001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000018	Titan Group	TA001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000019	Samanthas Diner	SAM01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000019	Office Supplies Unlimited	OFF01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000022	Samanthas Diner	SAM01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000031	Young Electric	YES01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000043	Hope Works (Pty) Ltd	HOP01	Cost Per Copy	

Drag a column header here to group by that column

EscFromEscalation	FeeTypeDesc	Type	ContractNo	CustomerName	Amount	Increase	NewAmount	ContractTypeDesc	CustomerCode	
<input checked="" type="checkbox"/>	No	BT0B - Service	FTB	CO0000012	Titan Group	-1,464.1	-146.410	-1,610.510	Cost Per Copy	TA001
<input checked="" type="checkbox"/>	No	BT0B - Bank	FTB	CO0000019	Office Supplies Unl...	423.500	42.350	465.850	Cost Per Copy	OFF01
<input checked="" type="checkbox"/>	No	BT0B - Service	FTB	CO0000074	Derton / Technologies	275.000	27.500	302.500	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	BT0B - Insura	FTB	CO0000074	Derton / Technologies	500.000	50.000	550.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	BT0B - Insura	FTB	CO0000018	Titan Group	300.000	15.000	315.000	Cost Per Copy	TA001
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000012	Titan Group	1,691.036	169.104	1,860.139	Cost Per Copy	TA001
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000018	Samanthas Diner	1,468.189	146.819	1,615.008	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000018	Samanthas Diner	1,076.671	107.667	1,184.339	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000018	Samanthas Diner	512.701	51.270	563.971	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000018	Samanthas Diner	356.109	35.611	391.720	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000018	Samanthas Diner	356.109	35.611	391.720	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000018	Samanthas Diner	323.735	32.374	356.109	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Bank Rental	PFE	CO0000019	Office Supplies Unl...	1,015.147	101.515	1,116.662	Cost Per Copy	OFF01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000031	Young Electric	770.400	77.040	847.440	Cost Per Copy	YES01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000031	Young Electric	770.400	77.040	847.440	Cost Per Copy	YES01
<input checked="" type="checkbox"/>	No	Loan	PFE	CO0000031	Young Electric	635.250	63.525	698.775	Cost Per Copy	YES01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000043	Hope Works (Pty) Ltd	665.500	66.550	732.050	Cost Per Copy	HOP01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000043	Hope Works (Pty) Ltd	665.500	66.550	732.050	Cost Per Copy	HOP01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000044	Bohas Networking inc	0.000	0.000	0.000	Cost Per Copy	BOT001
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000072	Hope Works (Pty) Ltd	500.000	50.000	550.000	Cost Per Copy	HOP01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	550.000	55.000	605.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	550.000	55.000	605.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000074	Derton / Technologies	165.000	16.500	181.500	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	550.000	55.000	605.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	11.000	1.100	12.100	Cost Per Copy	DER01

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Open Windows

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SAVE FEE ESCALATIONS

- Click on **Save**.

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Contract Types to be escalated

Marked	ContractType	ContractTypeDesc	ExcludeFromEscalation	ShortTerm	DeEscPerc	DeEscType
<input checked="" type="checkbox"/>	CPC	Standard Rentals	No	No	No	
<input checked="" type="checkbox"/>	PRE	Prepaid Contract	No	No	10.00	P

Fee Types to be escalated

Marked	Code	CodeDescription
<input checked="" type="checkbox"/>	REN	Standard Rentals
<input checked="" type="checkbox"/>	W	Renew Fee
<input checked="" type="checkbox"/>	I	Inhouse Rental
<input checked="" type="checkbox"/>	N	Insurance
<input checked="" type="checkbox"/>	R	Bank Rental
<input checked="" type="checkbox"/>	S	Service
<input checked="" type="checkbox"/>	E	Evergreen Rental

Contracts to be escalated

Drag a column header here to group by that column

Marked	ContractNo	CustomerName	CustomerCode	ContractTypeDesc	Class
<input checked="" type="checkbox"/>	CO0000012	Titan Group	TA001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000016	Titan Group	TA001	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000018	Samanthas Diner	SAM01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000019	Office Supplies Unlimited	OFF01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000022	Samanthas Diner	SAM01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000031	Young Electric	YES01	Cost Per Copy	
<input checked="" type="checkbox"/>	CO0000043	Hope Works (Pty) Ltd	HOP01	Cost Per Copy	

Drag a column header here to group by that column

EscFromEscalation	FeeTypeDesc	Type	ContractNo	CustomerName	Amount	Increase	NewAmount	ContractTypeDesc	CustomerCode	
<input checked="" type="checkbox"/>	No	BT0B - Service	FTB	CO0000012	Titan Group	-1,464.1	-146.410	-1,610.510	Cost Per Copy	TA001
<input checked="" type="checkbox"/>	No	BT0B - Bank	FTB	CO0000019	Office Supplies Unl...	423.500	42.350	465.850	Cost Per Copy	OFF01
<input checked="" type="checkbox"/>	No	BT0B - Service	FTB	CO0000074	Derton / Technologies	275.000	27.500	302.500	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	BT0B - Insura...	FTB	CO0000074	Derton / Technologies	500.000	50.000	550.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	BT0B - Insura...	FTB	CO0000016	Titan Group	300.000	15.000	315.000	Cost Per Copy	TA001
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000012	Titan Group	1,691.036	169.104	1,860.139	Cost Per Copy	TA001
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000018	Samanthas Diner	1,468.189	146.819	1,615.008	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000018	Samanthas Diner	1,076.671	107.667	1,184.339	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000018	Samanthas Diner	512.701	51.270	563.971	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000018	Samanthas Diner	356.109	35.611	391.720	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000018	Samanthas Diner	356.109	35.611	391.720	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000018	Samanthas Diner	323.735	32.374	356.109	Cost Per Copy	SAM01
<input checked="" type="checkbox"/>	No	Bank Rental	PFE	CO0000019	Office Supplies Unl...	1,015.147	101.515	1,116.662	Cost Per Copy	OFF01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000031	Young Electric	770.400	77.040	847.440	Cost Per Copy	YES01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000031	Young Electric	770.400	77.040	847.440	Cost Per Copy	YES01
<input checked="" type="checkbox"/>	No	Loan	PFE	CO0000031	Young Electric	635.250	63.525	698.775	Cost Per Copy	YES01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000043	Hope Works (Pty) Ltd	665.500	66.550	732.050	Cost Per Copy	HOP01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000043	Hope Works (Pty) Ltd	665.500	66.550	732.050	Cost Per Copy	HOP01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000044	Bohas Networking inc	0.000	0.000	0.000	Cost Per Copy	BOT001
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000072	Hope Works (Pty) Ltd	500.000	50.000	550.000	Cost Per Copy	HOP01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	550.000	55.000	605.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	550.000	55.000	605.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Insurance	PFE	CO0000074	Derton / Technologies	165.000	16.500	181.500	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	550.000	55.000	605.000	Cost Per Copy	DER01
<input checked="" type="checkbox"/>	No	Service	PFE	CO0000074	Derton / Technologies	11.000	1.100	12.100	Cost Per Copy	DER01

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- A **Run Period Escalations** message will pop asking you;
 - Are you sure you want to process this escalation?**
- Click on **Yes**.

The screenshot shows the 'Period Escalations' window with the following sections:

- Contract Types to be escalated:** A table with columns: Marked, ContractType, ContractTypeDesc, ExcludeFrom, ShortTerm, DeEscPerc, DeEscType. It lists 'CPC' and 'PRE' contract types.
- Fee Types to be escalated:** A table with columns: Marked, Code, CodeDescription. It lists 'REN' (Standard Rentals), 'W' (Renew Fee), 'I' (Inhouse Rental), 'N' (Insurance), 'R' (Bank Rental), 'S' (Service), and 'E' (Evergreen Rental).
- Contracts to be escalated:** A table with columns: Marked, ContractNo, CustomerName, CustomerCode, ContractTypeDesc, Class. It lists various contracts like 'CO0000012', 'CO0000018', etc.
- Run Period Escalations:** A modal dialog box asking 'Are you sure you want to process this escalation?' with 'Yes' and 'No' buttons.

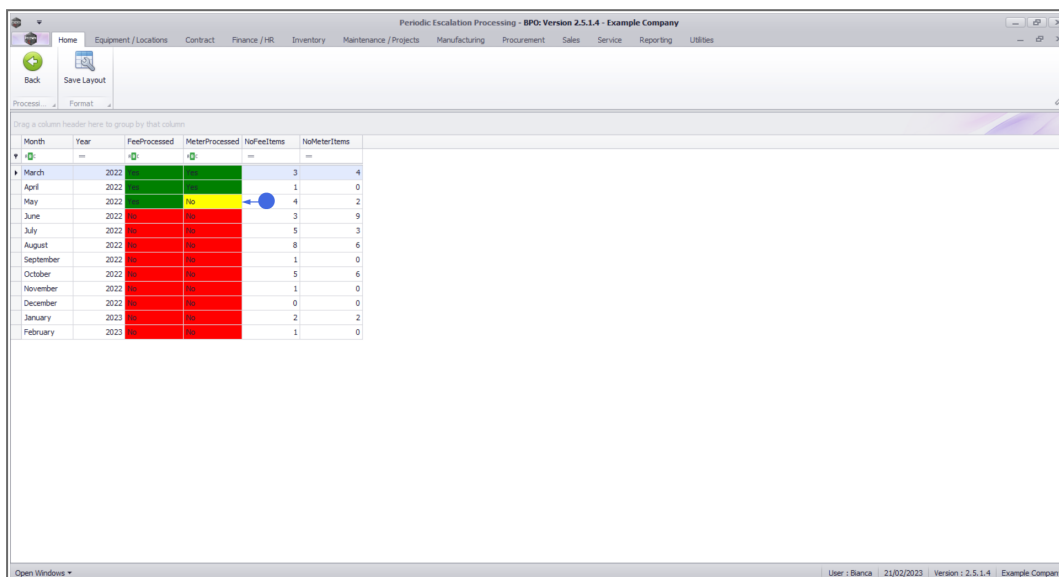
1. You will return to the **Period Escalations Processing** screen.
2. The **Fee Processed** colour will change from yellow to **green** for the processed period.

The screenshot shows the 'Periodic Escalation Processing' window with a table displaying the following data:

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Green	Green	3	4
April	2022	Green	Green	1	0
May	2022	Yellow	Green	4	2
June	2022	Red	Green	3	9
July	2022	Red	Green	5	3
August	2022	Red	Green	8	6
September	2022	Red	Green	1	0
October	2022	Red	Green	5	6
November	2022	Red	Green	1	0
December	2022	Red	Green	0	0
January	2023	Red	Green	2	2
February	2023	Red	Green	1	0

METER PROCESSING

1. In the **Period Escalation Processing** screen,
2. Double click on the **available** processing period for **Meter Processed** (i.e. the yellow **No** text box in the **Meter Processed** column).



Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	No	4	2
June	2022	No	No	3	9
July	2022	No	No	5	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	5	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

The 'Period Escalations' for Meters screen

The **Period Escalations** (for meters) screen will be displayed. This screen is divided into **4** frames:

1. **Contract Types to be escalated**
2. **Fee Types to be escalated**
3. **Contracts to be escalated**
4. **Contract Items** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.

- You can use the **Marked** check boxes to select the **Contract Types, Fee Types, Contracts, Contracts Items** that you wish to escalate.

- Each contract item meter charge will be listed individually, as follows:

- *Item Meter Minimum Billing (IMTR)*
- *Item Meter Cost per Copy (MTCH)*

- *Item Meter Back to Back Minimum Billing (MBTB)*
- *Item Meter Back to Back Cost per Copy (CBTB)*
- *Item Aggregate Meter Minimum Billing (AMTR)*
- *Item Aggregate Meter Cost per Copy (AMCH)*

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Save Back Close Save Layout Workspaces Export

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Contract Types to be escalated

Marked	ContractType	ExcludeNo	ShortTerm	DefectsPerc	DefectsType
<input checked="" type="checkbox"/>	OPC	Cost Per Copy	No	No	10.00 P
<input checked="" type="checkbox"/>	PRE	Prepaid Contract	No	No	10.00 P

Fee Types to be escalated

Marked	Code	CodeDescription
<input checked="" type="checkbox"/>	REBILLING	Maximum Billing Charge
<input checked="" type="checkbox"/>	UNITCHARGE	Unit Charge

Contracts to be escalated

Drag a column header here to group by that column

Marked	ContractNo	CustomerName	CustomerCode	ContractTypeDesc	Class
<input checked="" type="checkbox"/>	CC0000018	Titan Group	TIAG01	Cost Per Copy	
<input checked="" type="checkbox"/>	CC0000018	Samnath Diner	SAMN01	Cost Per Copy	
<input checked="" type="checkbox"/>	CC0000019	Office Supplies Unlimited	OFF001	Cost Per Copy	
<input checked="" type="checkbox"/>	CC0000031	Young Electric	YES001	Cost Per Copy	
<input checked="" type="checkbox"/>	CC0000043	Hope Works (Pty) Ltd	HOP001	Cost Per Copy	
<input checked="" type="checkbox"/>	CC0000074	Derton / Technologies	DER001	Cost Per Copy	

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7,076.08 685.39 7,763.72

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In the Linked Contract Item Charges Listing frame, look at the **Amount**, **Increase** and **New Amount** columns.

- **Amount:** This is the amount of the fee that is being charged.
- **Increase:** This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a **Percentage** or a **Flat Amount**).
 - In this image, the amount already set up on the system is a 10% escalation.
- **New Amount:** This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

Review these amounts to make sure they are correct, individual changes to the ***Increase*** amount can be made if required.

Save Meter Escalations

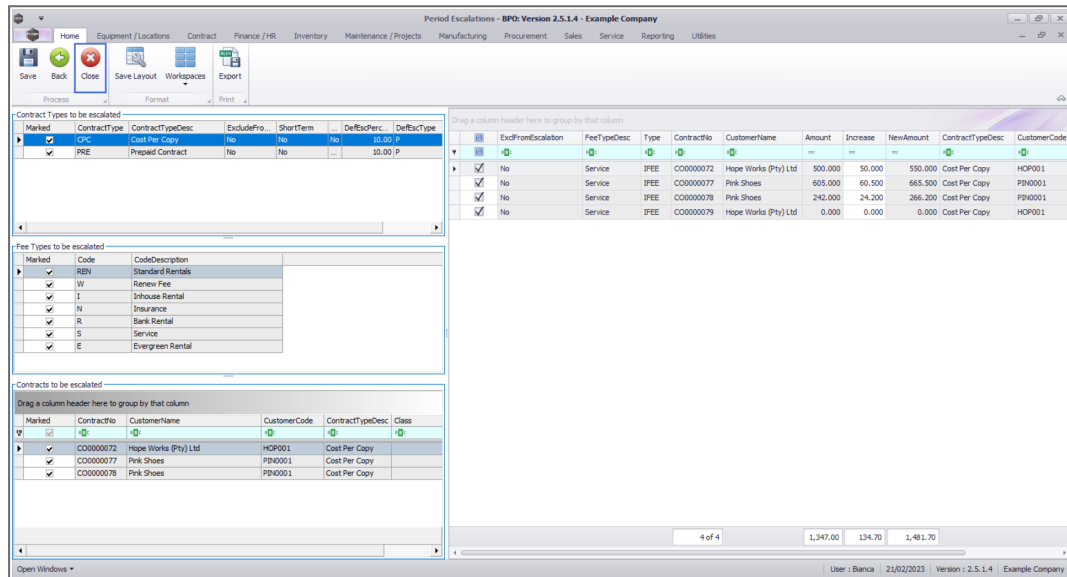
1. A **Run Period Escalations** message will pop asking you;
 - **Are you sure you want to process this escalation?**
2. Click on **Yes**.

- The **Meter Processed** colour will change from **yellow** to **green** for the processed period.
- Period Escalation processing for the upcoming month will now be complete.
- Click on **Back** to exit this screen.

IMPORTANT NOTES

CLOSING OFF AN ESCALATION WITHOUT ESCALATING CONTRACTS

- In the **Period Escalation** screen, click on **Close** if you want to close off a fee/meter escalation **without** escalating your contracts.

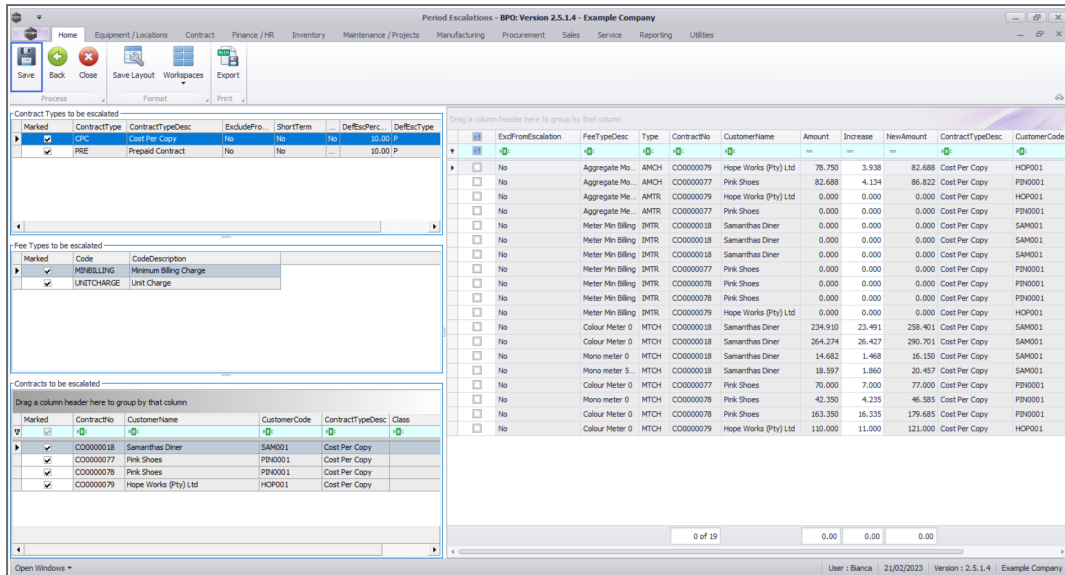


- An **Escalation Processing** message will pop up asking you;
 - Are you sure you want to close the period and not perform the escalations? This action will uncheck all the items.**
- Click on **Yes**.

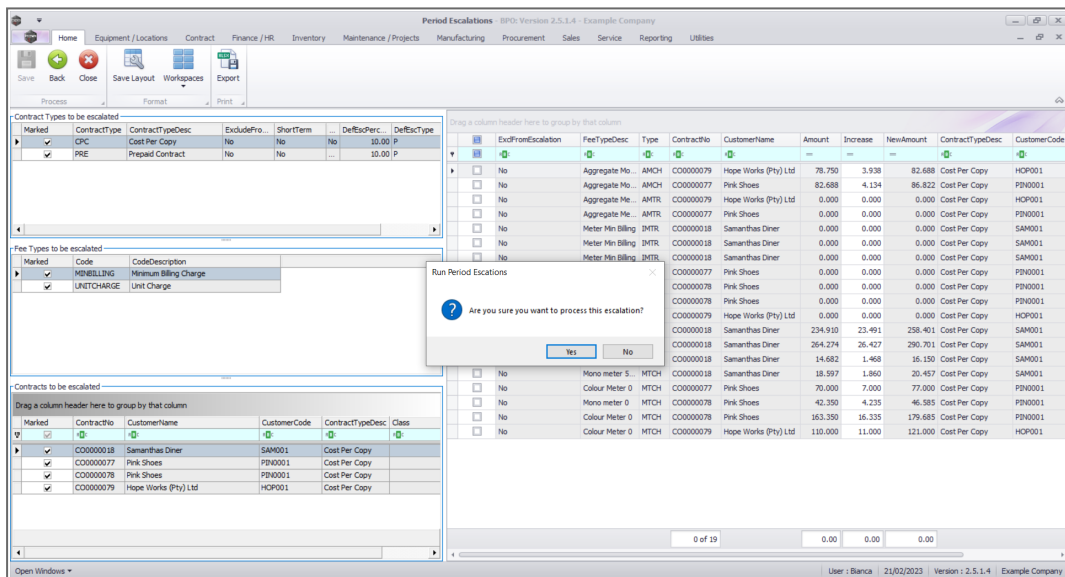
1. All the contract items to be escalated will be **unchecked**.

Save Unescalated Contracts

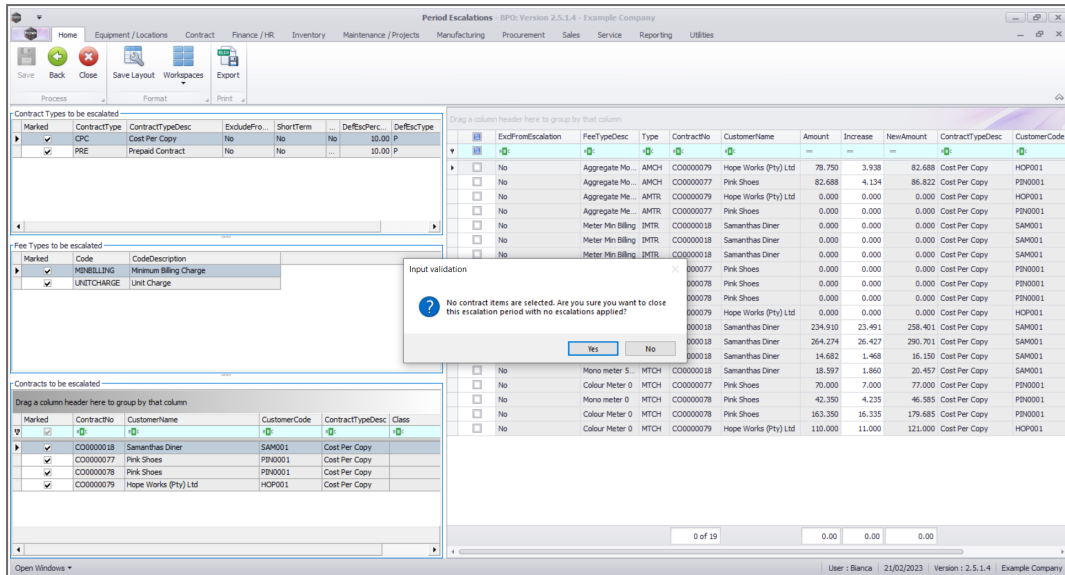
1. Click on **Save**.



1. A **Run Period Escalations** message will pop up asking you;
 - **Are you sure you want to process this escalation?**
2. Click on **Yes**.



1. An **Input validation** message will pop up asking you;
 - **No contract items are selected. Are you sure you want to close this escalation period with no escalations applied?**
2. Click on **Yes**.



1. You will return to the **Periodic Escalation Processing** screen.
2. The **Fee/Meter Processed** colour will change to **green** for the processed period.
 - In this image, the **Fee processed** changed colour to **green**.

The screenshot shows the 'Periodic Escalation Processing' window. It displays a table with columns: 'Month', 'Year', 'FeeProcessed', 'MeterProcessed', 'NoFeeItems', and 'NoMeterItems'. The table shows data for the months of March through February for the years 2022 and 2023. The 'FeeProcessed' column is highlighted in green for March 2022, indicating successful processing.

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	Yes	4	2
June	2022	Yes	Yes	3	9
July	2022	Yes	Yes	5	3
August	2022	Yes	Yes	8	6
September	2022	Yes	Yes	1	0
October	2022	Yes	Yes	5	6
November	2022	Yes	Yes	1	0
December	2022	Yes	Yes	0	0
January	2023	Yes	Yes	2	2
February	2023	Yes	Yes	1	0

NO FEES OR METERS TO PROCESS

If the period you are processing has **no** fees and or meter to process;

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

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Process... Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	Yes	4	3
June	2022	Yes	Yes	3	9
July	2022	No	No	0	10
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	5	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	1
February	2023	No	No	5	5

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1. an **Escalation Processing** message box will pop up asking;
 - **No items exist to be escalated. Do you wish to close this escalation period type?**
2. Click on **Yes**.

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Back Save Layout

Process... Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	Yes	4	3
June	2022	Yes	Yes	3	9
July	2022	No	No	0	10
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	5	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	1
February	2023	No	No	5	5

Escalation Processing

No items exist to be escalated. Do you wish to close this escalation period type?

Yes No

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