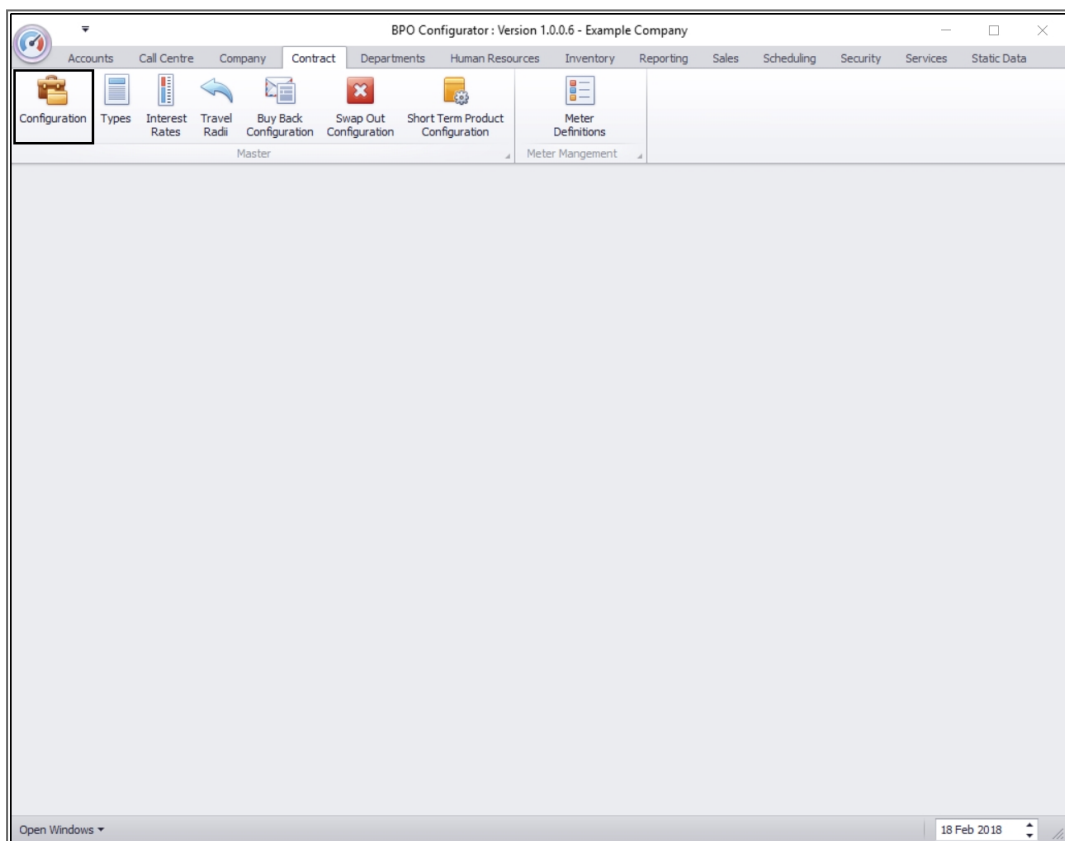


CONTRACT CONFIGURATION

The contract configuration must be set up in order to set up **contract types**. Once contract types have been set up, then contracts can be loaded onto the system.

A unique Meter Reading Request email message template can be configured: Subject, Email Contact, Meter Detail and Email Salutation.

Ribbon Access: *Configurator > Contract > Configuration*



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

- **Billing Method:** Ensure that this is set to **MINMAX**
- **Capture Method:** Ensure that this is set to **BATCH**
- **Auto Bill:** This option is flagged by default.
 - This means that the Billing Batch and the Contract Invoices will be created at the same time during Contract Billing (refer to **Processing: Billing**)
 - Unchecking this flag means that the user will need to run the Billing and then at a later time, create the Invoices from the Billing Batch (refer to **Processing: Billing (Auto Bill flag un-ticked)**).

Example: This scenario may occur when a company has a substantial number of invoices to be created. Instead of slowing down the system and running them at the same time as the Billing Batch, the invoices can be created after hours when the system is freed up.

- **Meter Reading Request Email** configuration:
 - For this configuration, ensure that you use the Parameters as defined in the default setup, so that the correct information pulls through from the database.
 - Update the Subject, Email Content, Meter Detail and Email Salutation as required
 - Click on **Save**.

Contract Configuration - BPO Configurator : Version 1.0.0.6 - Example Company

Home
Accounts
Call Centre
Company
Contract
Departments
Human Resources
Inventory
Reporting
Sales
Scheduling
Security
Services
Static Data

Save

Back

Workspaces

Refresh

Process
Format
Cur...

Details

Billing Method
Min/Max Method

Capture Method
Batch Method

Auto Bill
☒

Meter Reading Request Configuration

Subject

Meter Usage for @SerialNo test

Email Content

Dear @ContactName
Please supply the meter readings for the following device
for the month of @MonthName.
Model No. : @ModelNo
Serial no. : @SerialNo
Location : @Location
Address : @AddressLine1, @AddressLine2,
@AddressLine3, @AddressLine4
Readings are required for:
test

Meter Detail

Meter : @MeterDesc test

Email Salutation

Your assistance is greatly appreciated.
@CompanyName
test

Open Windows
18 Feb 2018

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