

# CONTRACT

## SHORT TERM CONTRACT - ADD CONTRACT

In order to create a **Short Term Contract** , you need to ensure that a Short Term Contract Type is configured on the system.

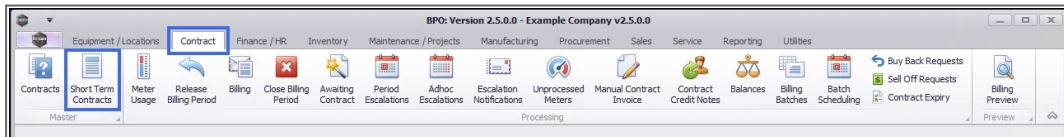
You will also need to configure the standard short term charges for Short Term Products.

Only internal assets can be linked to short term contracts.

The system auto creates the **work order**, the **part request** and auto issues the **internal asset**.

If a deposit is set at contract creation, the system auto creates the **deposit invoice**.

**Ribbon Access:** *Contract > Short Term Contracts*



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

- Click on **Add**.

Short Term Contract Listing - BPO: Version 2.1.0.62 - Example Company

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

Add Edit Close Machine Return WOs Short Term Invoice Save Layout Workspaces Save Filter Print Active Refresh

Maintain Process Format Print Current

Drag a column header here to group by that column

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	Order...	StartDate	EndDate	Period	PeriodType	PeriodTypeDe
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	Days	
STC0000020	ST	Short Term Contracts	BPO2 Test 7	HOP001	Hope Works	Tech	Technical		14 Nov 2016	15 Nov 2016	1 d	Days	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	Hour	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABOXYZ123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	Week	
STC0000024	ST	Short Term Contracts	Hillcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	Days	

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## ADD CUSTOMER DETAILS

- Click on the **search** button in the **Customer Name** field.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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Save Back Delete Item Save Layout Workspaces Print

Customer Name Start Date 2018/07/17

Contact Name Duration Type

Shipping address Duration 0

End Date 2018/07/17

Salesman

Location

Reference

Deposit Service

Deposit Due 0

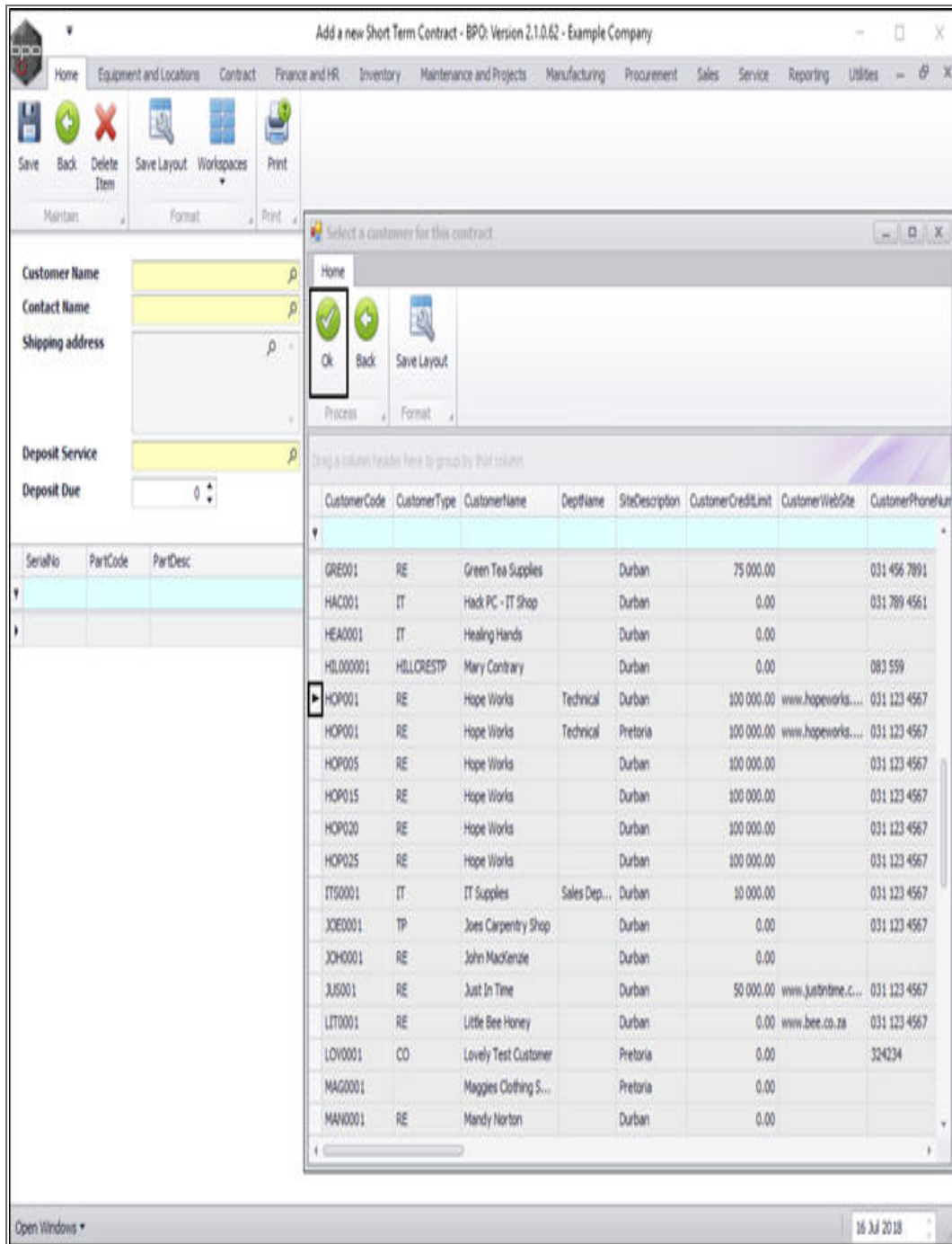
SerialNo	PartCode	PartDesc	ModelNo	Status

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- The **Select a customer for this contract** pop up screen will appear.
- Select the **row** of the **customer** that you wish to **create** a short

term contract for.

- Click on **Ok**.



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Save Back Delete Item Save Layout Workspaces Print

Customer Name

Contact Name

Shipping address

Deposit Service

Deposit Due

SerialNo PartCode PartDesc

Select a customer for this contract

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

CustomerCode	CustomerType	CustomerName	DeptName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNum
GRE001	RE	Green Tea Supplies		Durban	75 000.00		031 456 7891
HAC001	IT	Hack PC - IT Shop		Durban	0.00		031 789 4561
HEA001	IT	Healing Hands		Durban	0.00		
HIL000001	HILLORESTP	Mary Contrary		Durban	0.00		083 559
HOP001	RE	Hope Works	Technical	Durban	100 000.00	www.hopeworks....	031 123 4567
HOP001	RE	Hope Works	Technical	Pretoria	100 000.00	www.hopeworks....	031 123 4567
HOP005	RE	Hope Works		Durban	100 000.00		031 123 4567
HOP015	RE	Hope Works		Durban	100 000.00		031 123 4567
HOP020	RE	Hope Works		Durban	100 000.00		031 123 4567
HOP025	RE	Hope Works		Durban	100 000.00		031 123 4567
ITS0001	IT	IT Supplies	Sales Dep...	Durban	10 000.00		031 123 4567
JOE0001	TP	Joes Carpentry Shop		Durban	0.00		031 123 4567
JOH0001	RE	John MacKenzie		Durban	0.00		
JUS001	RE	Just In Time		Durban	50 000.00	www.justintime.c...	031 123 4567
LIT0001	RE	Little Bee Honey		Durban	0.00	www.bee.co.za	031 123 4567
LOV0001	CO	Lovely Test Customer		Pretoria	0.00		324234
MAG0001		Maggies Clothing S...		Pretoria	0.00		
MAN0001	RE	Mandy Norton		Durban	0.00		

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- Click on the **search** button in the **Contact Name** field.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/17

Contact Name: Duration Type:

Shipping address: Duration: 0

Deposit Service: End Date: 2018/07/17

Deposit Due: 0 Salesman:

Location:

Reference:

SerialNo	PartCode	PartDesc	ModelNo	Status

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- The **Select a contact for this Order** pop up screen will appear.
- Select the **row** of the **contact** that you wish to link to this short term contract.
- Click on **Ok**.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name Hope Works

Contact Name

Shipping address

Deposit Service

Deposit Due 0

SerialNo PartCode PartDesc

Select a contact for this Order

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

ParentContactName	ContactType	ContactTypeDesc	ContactFirstName	ContactSurname	ContactEmail	ContactPhoneNumber	Co
		Accounts	Contact			031 123 4567	Ac
	METER	Meter User	Jackie	Samuels	standard@noemail.co.za	031 123 4567	Ja
Mandy Jefferson	METER	Meter User	Jane	Alrich	standard@noemail.co.za	031 123 45671	Ja
	STD	Standard Contact	Kelly	Jones		031 123 4567	Ke
	STD	Standard Contact	Larry	King	standard@noemail.co.za	031 123 4567	lar
Simon Richardson	ACCOUNTS	Accounts Contact	Mandy	Jefferson	bianca@co3.co.za	031 555 1234	Me
	STD	Standard Contact	Mary	Jackson	standard@noemail.co.za	031 123 4567	Me
		Primary	Contact				Pri
	METER	Meter User	Sammy	Hope	standard@noemail.co.za	031 123 4567	Sa
	MNGT	Management	Stewart	Hope	standard@noemail.co.za	031 123 4567	Sh
	STD	Standard Contact	Tim	Matthews	standard@noemail.co.za	031 123 4567	Tin
	MNGT	Management	Tim	Matthews	standard@noemail.co.za	031 123 4567	Tin

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- Click on the **search** button in the **Shipping address** field.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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Save Back Delete Item Save Layout Workspaces Print

Customer Name Hope Works ρ Start Date 2018/07/17 ▾

Contact Name Mandy Jefferson ρ Duration Type ▾

Shipping address ρ Duration 0 ▾

Deposit Service ρ End Date 2018/07/17 ▾

Deposit Due 0 ▾ Salesman ▾

Location ▾

Reference ▾

SerialNo	PartCode	PartDesc	ModelNo	Status

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- The **Select an address for this contract** pop up screen will appear.
- Select the **row** of the **address** that you wish to link to this short

term contract.

- Click on **Ok**.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works

Contact Name: Mandy Jefferson

Shipping address:

Deposit Service:

Deposit Due: 0

SerialNo PartCode PartDesc

Select an address for this contract

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode	Country	LocationSwitchboard	
SHIP	Plot 91 Leaf Road	Forest Hills	New Town	Durban South	South Africa	1234		031 123 4567	0
SHIP	Should see this	for physical address				0000			
SHIP	1 Postal	Address	postal 3	postal 4	postal 5	postal code	ZA		

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## DEPOSIT SERVICE AND DEPOSIT DUE

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If a deposit is required, you need to ensure that it is logged at this point. In this step you will need to search for and select the **Deposit Service** as configured in **Services**.

If a deposit is not to be paid, continue this process at the [contract details](#) section.

- Click on the **search** button in the **Deposit Service** field.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works ρ Start Date: 2018/07/17

Contact Name: Mandy Jefferson ρ Duration Type: [Dropdown]

Shipping address: Plot 91 Leaf Road ρ Duration: 0

Forest Hills End Date: 2018/07/17

New Town Salesman: [Dropdown]

Durban South Location: [Dropdown]

1234 Reference: [Text]

Deposit Service: [Dropdown] ρ

Deposit Due: 0

SerialNo	PartCode	PartDesc	ModelNo	Status

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- The **Select the supplied services** pop up screen will appear.
- Select the **row** of the **service** that you wish to link to this short term contract.
- Click on **Ok**.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works  
 Contact Name: Mandy Jefferson  
 Shipping address: Plot 91 Leaf Road, Forest Hills, New Town, Durban South, 1234  
 Deposit Service:   
 Deposit Due: 0

Select the supplied service.

Ok Back Save Layout

Drag a column header here to group by that column

ServiceCode	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxCode	TaxRate	Status
CALL	Call Out Fee	INT	SER	100.00	ea	VAT	1	15.00	A
INST	Installation Fee	INT	SER	350.00	ea	VAT	1	15.00	A
DEL	Delivery Fee	INT	SER	150.00	ea	VAT	1	15.00	A
DEA	Dealer Service Fee	EXT	SER	350.00	ea	VAT	1	15.00	A
SET	Settlements	INT	SER	500.00	ea	VAT	1	15.00	A
INSP	Inspection	INT	SER	100.00	ea	VAT	1	15.00	A
TOLL	Toll Fee	EXT	SER	250.00	ea	VAT	1A	0.00	A
STCO	Short Term Contract Deposit	EXT	SER	10.00	ea	VAT	1	15.00	A
MYS	Meter Yield Short Fall	INT	SER	500.00	ea	VAT	1	15.00	A
LTCO	Long Term Contract Deposit	INT	SER	250.00	ea	VAT	1	15.00	A
LTCO	LTCO	INT	SER	250.00	ea	VAT	1	15.00	A
CLA	Cleaning Fee	INT	SER	500.00	ea	VAT	1	15.00	A
DES	Design consultation	INT	SER	450.00	ea	VAT	1	15.00	A
PRJ	Printing	INT	SER	350.00	ea	VAT	1	15.00	A
TEST	Test Service	INT	SER	250.00	ea	VAT	1	15.00	A
Retest	Retest	INT	SER	150.00	ea	VAT	1	15.00	A

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- In the **Deposit Due** field, either type in or use the arrow indicators to select the amount of deposit due.

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Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Customer Name Hope Works p Start Date 2018/07/17

Contact Name Mandy Jefferson p Duration Type

Shipping address Plot 91 Leaf Road p Forest Hills New Town Durban South 1234

Duration 0

End Date 2018/07/17

Salesman

Location

Reference

Deposit Service Short Term Contract Deposit p

Deposit Due 0

SerialNo	PartCode	PartDesc	ModelNo	Status

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## CONTRACT DETAILS

- **Start Date:** Either type in or click on the drop-down and use the calendar function to select the start date for this contract.

- **Duration Type:** Click on the drop-down arrow and select from the list the duration type for this short term contract (***Hours, Day, Week***).
- **Duration:** Either type in or use the arrow indicators to select the duration amount.
- **End Date:** This field will auto populate depending on the information entered in the Start Date, Duration Type and Duration fields. You can either type in or click on the drop-down and use the calendar function to select an alternative end date for this contract if required.
- **Salesman:** Click on the drop-down arrow and select from the list the salesman responsible for this short term contract
- **Location:** Click on the drop-down arrow and select from the list the location for this short term contract
- **Reference:** Type in a reference for this short term contract if required. This may be a customer reference.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Customer Name: Hope Works

Contact Name: Mandy Jefferson

Shipping address: Plot 91 Leaf Road, Forest Hills, New Town, Durban South, 1234

Deposit Service: Short Term Contract Deposit

Deposit Due: 2 500

Start Date: 2018/07/17

Duration Type:

Duration: 0

End Date: 2018/07/17

Salesman:

Location:

Reference:

SerialNo	PartCode	PartDesc	ModelNo	Status

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## ADD A NEW PART (ITEM)

When you have finished adding details to the short term contract information frame, move down the screen to the **Parts** frame.

- Click in the ***Serial No*** field.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HWI STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status

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- The ***Select an asset to add to this contract*** pop up screen will appear.

- Click on the **row selector** in front of the **asset** that you wish to link to this short term contract.

**Note:** As explained in the introduction, only **internal assets** can be linked to a short term contract. In this image you can see in the **Warehouse Name** and **Bin Name** columns, that the system has only displayed the parts available in the **Assets Warehouse** and the **Internal Assets** bin.

- Click on **Ok**.



Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Select an asset to add to this contract.

Deposit Service: Ok Back Save Layout

Deposit Due: Process Format

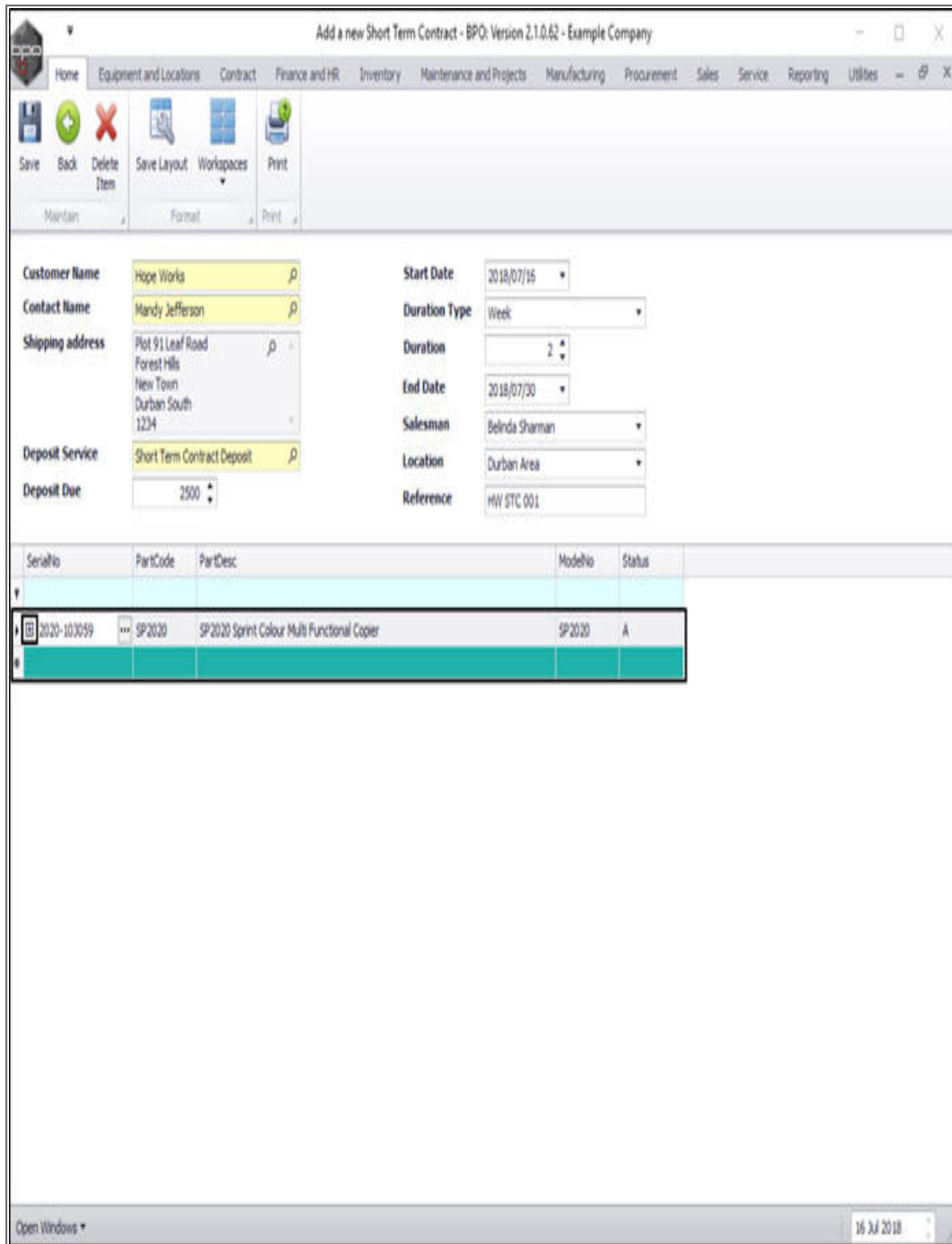
SerialNo	AssetRegNo	PartCode	PartDesc	ModelNo	WhseName	BinName	Quantity	Cost	Status
abc147n	SP2020	SP2020	Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.00	A
test121212	AREG000030	SP2020	Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.00	A
2020-103051	AREG000047	SP2020	Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.00	A
2020-103053	AREG000048	SP2020	Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.00	A
2020-103059	AREG000054	SP2020	Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.00	A
101234	AREG000169	SP2020	Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.00	A
1818-8594	AREG000241	SP1818	Sprint copier		Assets Warehouse	Internal Assets	1	0.00	A
2020-9867LU	AREG000262	SP1818	Sprint copier		Assets Warehouse	Internal Assets	1	0.00	A
SN13512345	1458-96523	K147	Kyocera Colour Copier	K147	Assets Warehouse	Internal Assets	1	0.00	A
1912-102030	SP19-123456	SP19-12	Colour Copier	SP19-12	Assets Warehouse	Internal Assets	1	0.00	A
	AREG000208	2020-856	Drum		Assets Warehouse	Internal Assets	1	0.00	A
998-987654	2020-998		Staple Unit		Assets Warehouse	Internal Assets	1	0.00	A
1020-10102	AREG000007	SP1020	Copier	SP1020	Assets Warehouse	Internal Assets	1	0.00	A
121212	AREG000031	SP500	Sprint Colour Copier		Assets Warehouse	Internal Assets	1	0.00	A

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- The selected part details will now populate the **Serial No**, **Part Code**, **Parts Description**, **Model No** and **Status** fields.
- A **new row** will be created for **another part** to be added to this

frame if required.

- Click on the **expand** icon in the row of the added part.



Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

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- The **Item Fees** and **Item Meters** frames will be expanded

## ITEM FEES

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- This columns in this frame will populate with the ***default charge (s)*** from the ***product configuration***.
  - **Marked:** Click on this check box if you wish to link this item fee.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees Item Meters

Marked	FeeType	FeeTypeDesc	InvoiceDescription	ChargeRate	AccountCode	COSAccountCode	Period	PeriodType	StartDate	EndDate	Status
<input type="checkbox"/>	S	Service	Service	2 800.00	1101	2101	2	W	16 Jul 2018	30 Jul 2018	A

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## ITEM METERS

- Click on the **Item Meters** tab.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees Item Meters

Marked	FeeType	FeeTypeDesc	InvoiceDescription	ChargeRate	AccountCode	COSAccountCode	Period	PeriodType	StartDate	EndDate	Status
X	S	Service	Service	2 800.00	1101	2101	2 w		16 Jul 2018	30 Jul 2018	A

Open Windows 16 Jul 2018

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

1. You will note that the **Is Active** column initially states 'No'.
2. Click on the **Marked** check box(es) in front of the **meters(s)** you wish to link to this short term contract.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16  
 Contact Name: Mandy Jefferson Duration Type: Week  
 Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2  
 Deposit Service: Short Term Contract Deposit End Date: 2018/07/30  
 Deposit Due: 2500 Salesman: Belinda Sharman  
 Location: Durban Area Reference: HW-STC-001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees	Item Meters
Marked	MeterCode MeterDesc ChargeRate AccountCode COSAccountCode PeriodType StartReading ReadingDate IsActive
<input type="checkbox"/>	Mono Mono meter 560.00 1101 2101 w 0.00 01 Jan 1900 No
<input type="checkbox"/>	Colour Colour Meter 1 120.00 1101 2101 w 0.00 01 Jan 1900 No

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1. In this image you can see that the **Marked** check boxes are now **ticked** and the **Is Active** fields now display **'Yes'**.
2. Now go to the **Reading Date** fields and either type in or click on the drop-down arrow and use the calendar function to select the date. (This reading should be taken on the date the contract starts - so that the contract invoice will be correct).

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees	Item Meters								
Marked	MeterCode	MeterDesc	ChargeRate	AccountCode	COSAccountCode	PeriodType	StartReading	ReadingDate	IsActive
<input checked="" type="checkbox"/>	Mono	Mono meter	560.00	1101	2101	w	0.00	01 Jan 1900	Yes
<input checked="" type="checkbox"/>	Colour	Colour Meter	1 120.00	1101	2101	w	0.00	01 Jan 1900	Yes

1

2

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- Click in the **Start Reading** fields and either type in or use the directional arrows to select the correct meter reading amount. (This reading must be recorded - so that the contract invoice will be correct).



Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees	Item Meters
Marked	MeterCode MeterDesc ChargeRate AccountCode COSAccountCode PeriodType StartReading ReadingDate IsActive
<input checked="" type="checkbox"/>	Mono Mono meter 560.00 1101 2101 w 0.00 16 Jul 2018 Yes
<input checked="" type="checkbox"/>	Colour Colour Meter 1 120.00 1101 2101 w 0.00 16 Jul 2018 Yes

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- Click in the **Charge Rate** fields and either type in or use the directional arrows to select an alternative charge rate if required.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees	Item Meters
Marked	MeterCode MeterDesc ChargeRate AccountCode COSAccountCode PeriodType StartReading ReadingDate IsActive
✓	Mono Mono meter 560.00 1101 2101 w 200.00 16 Jul 2018 Yes
✓	Colour Colour Meter 1 120.00 1101 2101 w 200.00 16 Jul 2018 Yes

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## LINK ADDITIONAL ITEMS

- If you wish to add additional items to this contract, click in the **Serial No** field in the **new row** of the Parts frame.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Muls Functional Copier	SP2020	A

Item Fees	Item Meters
Marked	MeterCode MeterDesc ChargeRate AccountCode COSAccountCode PeriodType StartReading ReadingDate IsActive
<input checked="" type="checkbox"/>	Mono Mono meter 560.00 1101 2101 w 200.00 16 Jul 2018 Yes
<input checked="" type="checkbox"/>	Colour Colour Meter 1 120.00 1101 2101 w 200.00 16 Jul 2018 Yes

Open Windows 16 Jul 2018

- An **ellipsis** button will be revealed. Follow the [Add a New Part \(Item\)](#) steps to complete this process.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees	Item Meters
Marked	MeterCode MeterDesc ChargeRate AccountCode COSAccountCode PeriodType StartReading ReadingDate IsActive
<input checked="" type="checkbox"/>	Mono Mono meter 560.00 1101 2101 w 200.00 16 Jul 2018 Yes
<input checked="" type="checkbox"/>	Colour Colour Meter 1 120.00 1101 2101 w 200.00 16 Jul 2018 Yes

Open Windows 16 Jul 2018

## SAVE SHORT TERM CONTRACT

- When you have finished adding the details and linking the parts to the short term contract, click on **Save**.

Add a new Short Term Contract - BPO: Version 2.1.0.62 - Example Company

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

Save Back Delete Item Save Layout Workspaces Print

Customer Name: Hope Works Start Date: 2018/07/16

Contact Name: Mandy Jefferson Duration Type: Week

Shipping address: Plot 91 Leaf Road Forest Hills New Town Durban South 1234 Duration: 2

Deposit Service: Short Term Contract Deposit End Date: 2018/07/30

Deposit Due: 2500 Salesman: Belinda Sharman

Location: Durban Area Reference: HW STC 001

SerialNo	PartCode	PartDesc	ModelNo	Status
2020-103059	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	A

Item Fees	Item Meters								
Marked	MeterCode	MeterDesc	ChargeRate	AccountCode	COSAccountCode	PeriodType	StartReading	ReadingDate	IsActive
<input checked="" type="checkbox"/>	Mono	Mono meter	560.00	1101	2101	w	200.00	16 Jul 2018	Yes
<input checked="" type="checkbox"/>	Colour	Colour Meter	1 120.00	1101	2101	w	200.00	16 Jul 2018	Yes

Open Windows 16 Jul 2018

- The contract will be **saved** and you will return to the **Short Term Contract Listing** screen.
- Here you can view the new contract information.

Short Term Contract Listing - BPO: Version 2.1.0.62 - Example Company

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

Add Edit Close Machine Return WOs Short Term Invoice Save Layout Workspaces Save Filter Print Active Refresh

Drag a column header here to group by that column

ContractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType	PeriodTy
STC0000019	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2 d	Days	
STC0000020	ST	Short Term Contracts	BPO2 Test 7	HOP001	Hope Works	Tech	Technical		14 Nov 2016	15 Nov 2016	1 d	Days	
STC0000021	ST	Short Term Contracts	Main	APP0001	Apple Juice Inc	Sales	Sales Department	1234	08 Jun 2017	08 Jun 2017	2 h	Hour	
STC0000022	ST	Short Term Contracts	BPO_RSI	ABCXY2123	ABC Shoe Co			fdg	26 Jun 2017	03 Jul 2017	1 w	Week	
STC0000024	ST	Short Term Contracts	Hilcrest	APP0001	Apple Juice Inc	Sales	Sales Department	10	10 Aug 2017	20 Aug 2017	10 d	Days	
STC0000027	ST	Short Term Contracts	Durban Area	HOP001	Hope Works	Tech	Technical	HW STC 001	16 Jul 2018	30 Jul 2018	2 w	Week	

Open Windows 16 Jul 2018

- If you updated the Deposit Charge details, a [Sales Deposit Invoice](#) will be automatically created, which you can [print](#).

## Related Topics

- [Edit Short Term Contract](#)
- [Short Term Contract Invoice](#)
- [Reprint Short Term Contract Invoice](#)
- [Create Machine Return Work Order](#)
- [Close Short Term Contract](#)
- [Contract and Return Report](#)

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