

CONTRACT

SHORT TERM CONTRACT - ADD CONTRACT

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

You will also need to configure the standard short term charges for <u>Short</u> 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

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	Equipment /	Locations	Contract	Finan	ice / HR 1	Inventory	Maintenand	e / Projects	Manufactur	ng Procure	ment Sales	Service	Reporting	Utilities				
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Contracts	Short Term Contracts	Meter Usage	Release Billing Period	Biling	Close Billing Period	Awaiting Contract	Period Escalations	Adhoc Escalations	Escalation Notifications	Unprocessed Meters	Manual Contract Invoice	Contract Credit Notes	Balances	Billing Batches	Batch Scheduling	Contract Expiry	Billing Preview	
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The *Short Term Contract Listing* screen will be displayed.

• Click on *Add*.



Short Term Contract - Add Contract

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ADD CUSTOMER DETAILS

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



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Customer Name		P	Start Date	2018/07/17 •	1							
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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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				IT50001	Π	IT Supples	Sales Dep	Durban	10 000.00		031 123 4567	7
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• Click on the *search* button in the *Contact Name* field.



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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*.



Short Term Contract - Add Contract

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			Mandy Jefferson	METER	Meter User	Jane.	Alrich.	standard@noemail.coza	031 123 45671	-
				STD	Standard Contact	Kely	Jones		031 123 4567	K
				STD	Standard Contact	larry	king	standard@noemail.coza	031 123 4567	1
		1	Simon Richardson	ACCOUNTS	Accounts Contact	Mandy	Jefferson	bianca@co3.co.za	031 555 1234	1
				STD	Standard Contact		Jackson	standard@noemail.coza	031 123 4567	1
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				METER	Meter User	Sammy	Hope	standard@noemail.coza	031 123 4567	-
				MNGT	Management	Stewart	Hope	standard@noemail.coza	031 123 4567	-
				STD	Standard Contact	Tim	Matthews	standard@noemail.coza	031 123 4567	-
				MNGT	Management	Tm	Matthews	standard@noemail.coza	031 123 4967	1
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• Click on the *search* button in the *Shipping address* field.



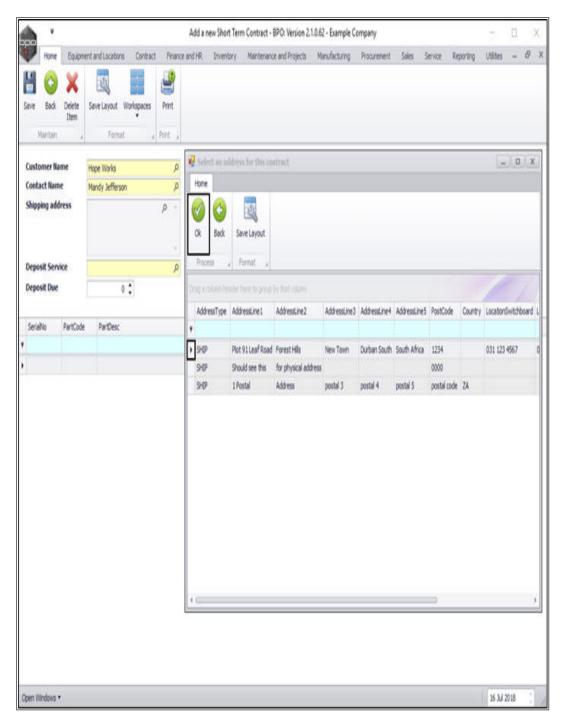
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- The *Select an address for this contract* pop up screen will appear.
- Select the *row* of the *address* that you wish to link to this short



term contract.

• Click on *Ok*.





DEPOSIT SERVICE AND DEPOSIT DUE

If a deposit <u>is</u> 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 <u>not</u> to be paid, continue this process at the <u>contract details</u> section.

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



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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*.



Short Term Contract - Add Contract

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						CEA	Dealer Senice Fee	EXT	SER	350.00		VAT	1	15.00			
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						THEP	Inspection	M	SER	100.00		VAT	1	15.00			
						TOLL	Tol Fee	EXT	SER	250.00		VAT	IA	0.00			
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						LTCD	LTCD	M	SER	250.00		VAT	1	15.00			
						QA	Cleaning Fee	M	58R	500.00	68	VAT	1	15.00			
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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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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.



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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.

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Deposit Servic	e	Short Term Contra	ct Deposit	P		1	ocation	Durban Area		•						
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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*.



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	2020-103051	AREG000047	SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.0	0 A		
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	lo1234	AREG000169	SP2020	SP 2020 Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.0	0 A		
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	2020-9867LU	AREG000262	SP 1818	Sprint copier		Assets Warehouse	Internal Assets	1	0.0	A 0		
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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.

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• The Item Fees and Item Meters frames will be expanded



ITEM FEES

- 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.



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ITEM METERS

• Click on the *Item Meters* tab.



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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.

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- 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).



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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 <u>must</u> be recorded - so that the contract invoice will be correct).



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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.



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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.



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 An *ellipsis* button will be revealed. Follow the <u>Add a New Part</u> (<u>ltem</u>) steps to complete this process.



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SAVE SHORT TERM CONTRACT

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



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- 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 - Add Contract

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• If you updated the Deposit Charge details, a <u>Sales Deposit</u> <u>Invoice</u> will be automatically created, which you can <u>print</u>.

Related Topics

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- Edit Short Term Contract
- Short Term Contract Invoice
- <u>Reprint Short Term Contract Invoice</u>
- <u>Create Machine Return Work Order</u>
- <u>Close Short Term Contract</u>
- Contract and Return Report

MNU.158.002