

CONTRACT

ADD CONTRACT PREPAID METERS

This contract type is to be used where a set meter charge was paid ahead of contract creation, and meters are **not** billed until their usage limit / duration is reached.

Only meters are considered to be prepaid.

Fees continue to be billed based on the billing cycle.

Meters still appear in **monthly usage for reading capture**. This reading needs to be captured correctly, as the prepaid meter usage will determine whether the limit has been reached (regardless of meter resets).

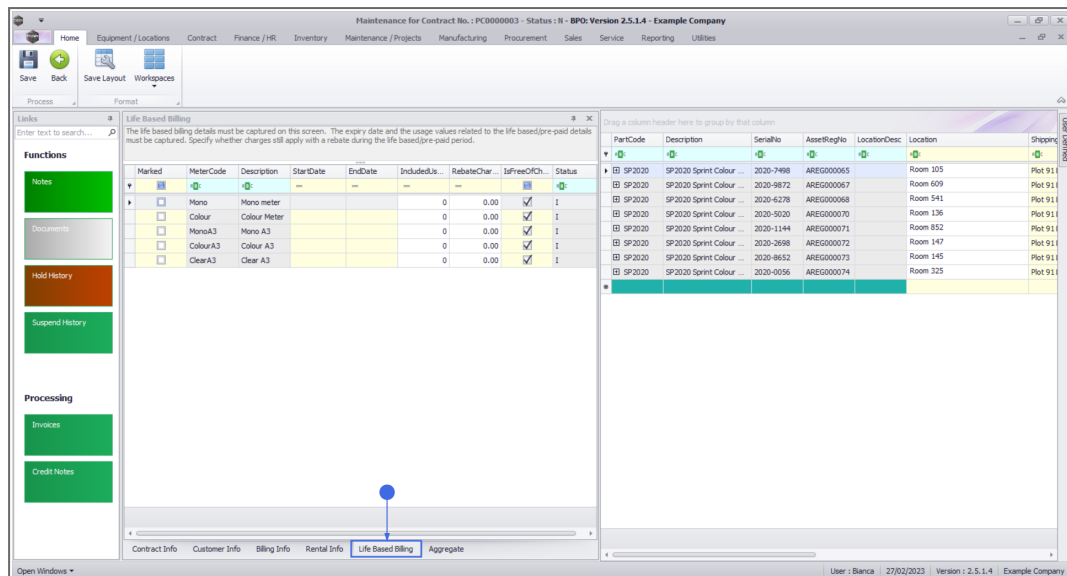
When the duration / meter usage limit is about to be reached or is reached, an email is sent to the customer account manager. The customer account manager can review the contract if applicable.

Once the prepaid portion of the contract expires either by duration or usage, aggregate billing set up on the contract commences.

The **Enforce Authorisation flag** should always be selected.

PREPAID METERS SETUP

- Click on the **Life Based Billing** tab.
- The **Life Based Billing** frame will be expanded.
- This is where the prepaid meter usage limit and duration are set.



Life Based Billing

The life based billing details must be captured on this screen. The expiry date and the usage values related to the life based/pre-paid details must be captured. Specify whether charges still apply with a rebate during the life based/pre-paid period.

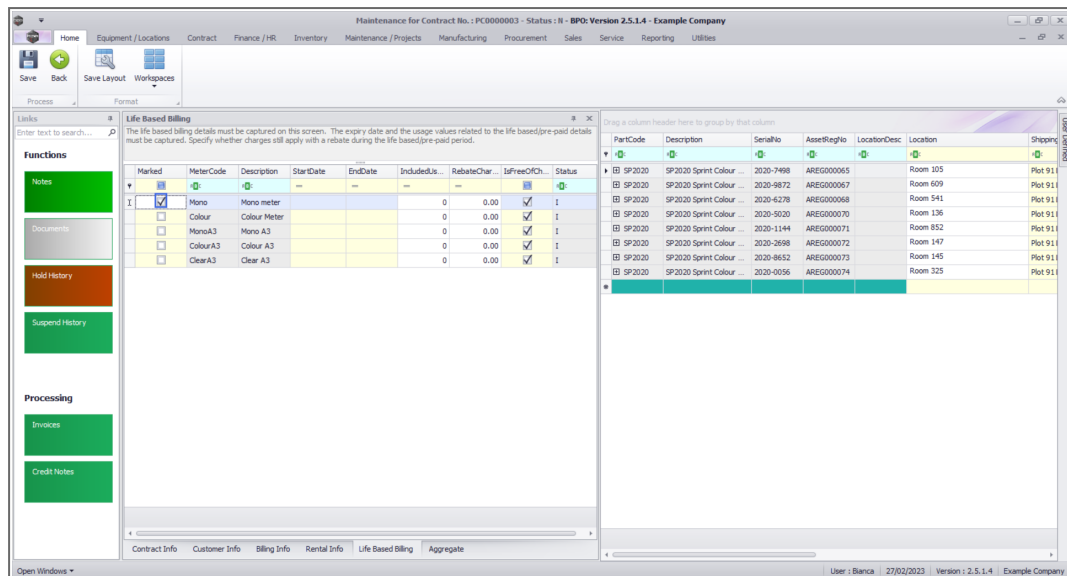
Marked	MeterCode	Description	StartDate	EndDate	IncludedUs...	RebateChar...	IsFreeOfCh...	Status
<input checked="" type="checkbox"/>	Mono	Mono meter			0	0.00	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	Colour	Colour Meter			0	0.00	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	MonoA3	Mono A3			0	0.00	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	ColourA3	Colour A3			0	0.00	<input checked="" type="checkbox"/>	1
<input checked="" type="checkbox"/>	ClearA3	Clear A3			0	0.00	<input checked="" type="checkbox"/>	1

Processing

Contract Info Customer Info Billing Info Rental Info **Life Based Billing** Aggregate

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- **Marked:** Click on the check box in front of the meter type(s) which should be included in prepaid billing.
 - In this image the **Mono and Colour** meters have been selected.
 - **Note 1:** Select the same meter type(s) as you selected in the **Aggregate Frame**.
 - **Note 2:** On a contract item with different meter types e.g., mono and colour meters, its possible to have only one meter type on prepaid billing (e.g., mono meter) while the other meter type (e.g., colour meter) is on **standard billing**.



Life Based Billing

The life based billing details must be captured on this screen. The expiry date and the usage values related to the life based/pre-paid details must be captured. Specify whether charges still apply with a rebate during the life based/pre-paid period.

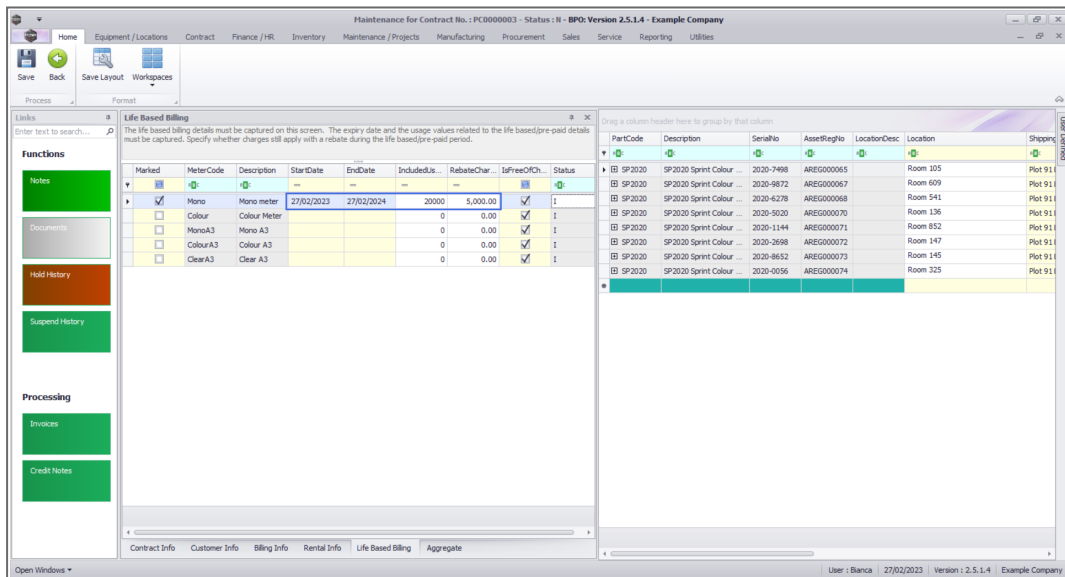
Marked	MeterCode	Description	StartDate	EndDate	IncludedUs...	RebateChar...	IsFreeOfCh...	Status
<input checked="" type="checkbox"/>	Mono	Mono meter			0	0.00	<input checked="" type="checkbox"/>	I
<input type="checkbox"/>	Colour	Colour Meter			0	0.00	<input checked="" type="checkbox"/>	I
<input type="checkbox"/>	MonoA3	Mono A3			0	0.00	<input checked="" type="checkbox"/>	I
<input type="checkbox"/>	ColourA3	Colour A3			0	0.00	<input checked="" type="checkbox"/>	I
<input type="checkbox"/>	ClearA3	Clear A3			0	0.00	<input checked="" type="checkbox"/>	I

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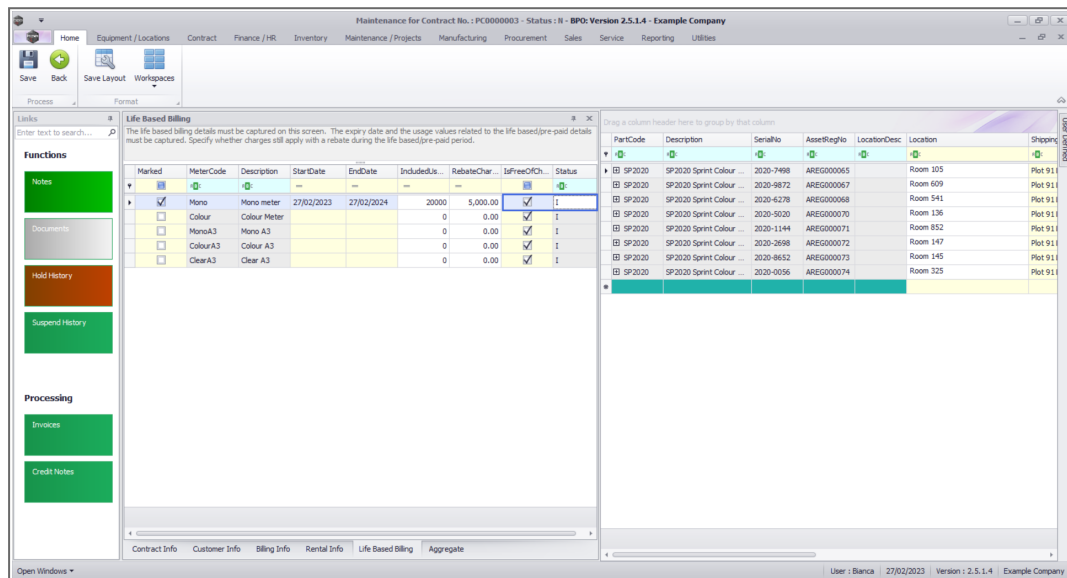
- The expiry of the prepaid portion of the contract is determined either by duration or usage (whichever comes first).
- The **Start** and **End Date** determines the duration of the prepaid portion of the contract. If the duration lapses first before the included usage is exceeded, the prepaid portion for that meter type expires.
- The **Included Usage** is the total usage per meter type included in the prepaid portion of the contract. If this value is exceeded first before the duration lapses, the prepaid portion for that meter type expires.
 - **Start Date:** Click on the drop-down arrow and use the calendar function to select the correct start date of the prepaid portion of the contract for the selected meter type.
 - **Note 1:** The **Start Date** for different meter types on the same contract does not necessarily have to be the same.

- **Note 2:** The **Start Date** does not necessarily have to be the same with the **Reading Date** in the **Items Frame**.
- **End Date:** Click on the drop-down arrow and use the calendar function to select the correct end date of the prepaid portion of the contract for the selected meter type.
 - **Note:** The **End Date** for different meter types on the same contract does not necessarily have to be the same.
- **Included Usage:** Type in the total usage included in the prepaid portion of the contract for the selected meter type.
 - **Note:** The **Included Usage** for different meter types on the same contract does not necessarily have to be the same.
- **Rebate Charges:** Type in the salesman's commission if applicable. This does not affect billing in any way.



The screenshot shows the 'Life Based Billing' screen in the CO3 Technologies software. The main table lists meter details with columns: Marked, MeterCode, Description, StartDate, EndDate, IncludedUs, RebateChar, IsFreeOfCh, and Status. The table contains data for various meter types including Mono, Colour, Mono A3, and Clear A3. The interface also includes a sidebar with functions like Notes, Documents, Hold History, Suspend History, Invoices, and Credit Notes. The top navigation bar shows various menu items like Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities.

- **Scroll right** to view the remaining columns.
- **Free Of Charges:** This will be selected by default. This should always be selected for meters included in pre-paid billing.
- **Status:** This is a static field and defaults as A - Active once saved.



Life Based Billing

The life based billing details must be captured on this screen. The expiry date and the usage values related to the life based/pre-paid details must be captured. Specify whether charges still apply with a rebate during the life based/pre-paid period.

Marked	MeterCode	Description	StartDate	EndDate	IncludedUs...	RebateChar...	IsFreeOfCh...	Status
<input checked="" type="checkbox"/>	Mono	Mono meter	27/02/2023	27/02/2024	20000	5,000.00	<input checked="" type="checkbox"/>	A
<input type="checkbox"/>	Colour	Colour Meter			0	0.00	<input checked="" type="checkbox"/>	A
<input type="checkbox"/>	MonoA3	Mono A3			0	0.00	<input checked="" type="checkbox"/>	A
<input type="checkbox"/>	ColourA3	Colour A3			0	0.00	<input checked="" type="checkbox"/>	A
<input type="checkbox"/>	ClearA3	Clear A3			0	0.00	<input checked="" type="checkbox"/>	A

Items

PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	Shipped
SP2020	SP2020 Sprint Colour ...	2020-7488	AREG0000065	Room 105	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-6872	AREG0000067	Room 609	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-6278	AREG0000068	Room 541	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-5920	AREG0000070	Room 136	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-1144	AREG0000071	Room 852	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-2698	AREG0000072	Room 147	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-8652	AREG0000073	Room 145	Plot 911	
SP2020	SP2020 Sprint Colour ...	2020-0056	AREG0000074	Room 325	Plot 911	

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Next: Link Contract Item [Inclusions](#)

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