

# CONTRACT

# ADD CONTRACT ITEM INCLUSIONS

You will be following the process below to add each item to be linked to this contract, where Inclusions apply.

# Item Inclusions Frame

• Click on the *Item Inclusions* tab.

The *Item Inclusions* frame will be expanded.

- In the *Item Inclusions* frame, you can add all *Contract Inclusions* (items which are included in the contract and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically "included" in the contract and are covered by a set contract fee agreed between the customer and service provider.
- Although they are included, you can have a breakdown of each individual inclusion. This breakdown is achieved by utilising the Link Fee panel within the Item Inclusion panel. For more information, refer to the Link Fee topic.



ф т		Ма	intenanc	e for Con	tract No. : CO000004	- Status : A	BPO: Version	2.5.1.4 - Exan	nple Comp	any			C	- 8 x
Home Equipment	t/Locations Contract Finance/HR Inventory	Mainte	nance / Pr	rojects	Manufacturing Pro	curement S	iales Servic	e Reporting	) Utilitie	s				- 8 ×
💾 🔥 🛛 🔯														
Save Back Save Layout	Workspaces													
	-													
Process 4 Porm														~
Enter text to search	Contract Info	4												User
gate	Contract No CC00000041		Parto	Code	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TravelRadi.
Functions	Contract Type Cost Per Coox		* FD:				( <b>D</b> :	N <b>D</b> C	Parantian			HQC	-	- 2
e Notes	Contract Class	•	• 🖬 🖓	2020 Them Fire	SP2020 Sprint Colour	2020-103050	AREGUUUU46		Reception		25 Lonestar Road, Ranchville,	2100	24.00	
ised	Contract Category	-		Code	s Item Meters Item	Description	tem contacts	SLAType	Quantity	FeeType				
alling	Start Date 05/07/2016 *			•										
Documents	End Date 05/07/2021 *		•											
	Period 60 ± *													
Hold Mintery	Period Type Months													
THOSE T BOLD BY	Department Sales Department	••												
	Contract Manager Blanca Du Tolt													
Suspend History	Salesman Bianca Du Toit													
	Aggregate Billing													
	Hide Fee Detail													
Processing														
Invoices														
Credit Notes														
	Contract Info Customer Info Billing Info Ren	tal Info	•											+
Open Windows 🕶											User : Bianca 03/0	2/2023 Version	: 2.5.1.4 Exa	ample Company

### Add Item Inclusions

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- A *Process* menu will pop up with the following options:
  - Part:<u>Add Part Inclusion</u>
  - BOM: Add Bill Of Materials Inclusion
  - Craft: Add Craft Inclusion
  - Service: Add Service Inclusion
  - Link Fee:Link A Fee To An Inclusion
  - Delete: Delete Inclusion



# Add New Contract - Item Inclusions

ф <u>т</u>		Ma	intenance for C	ontract No. : CO000004	1 - Status : A	- BPO: Versio	n <b>2.5.1.4</b> - Exar	mple Company				- B X
Home Equipme	nt / Locations Contract Finance / HR Inventory	Mainte	nance / Projects	Manufacturing Pro	curement	Sales Servi	ce Reporting	g Utilities				- 8 ×
💾 📀 🛛 🖾												
Save Back Save Layout	t Workspaces											
Process / For	mat											~
Links	Contract Info	3										Use
Enter text to search	P		PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TravelRadiu
Functions	Contract No CO0000041		9 IO:	••••	-O-	-0-	1 <b>0</b> 0	(D):	(D)	(D)	-	-
Ufc	Contract Type Cost Per Copy	• •	▶ ⊟ SP2020	SP2020 Sprint Colour	2020-10305	0 AREG00004	5	Reception	25 Lonestar Road, Ranchville,	2100	24.00	
B Notes	Contract Class	*	Item F	ees Item Meters Iter	n Inclusions	Item Contacts						
2	Contract Category	*	9 Code		Description		SLAType	Quantity FeeType				
lling	Start Date 05/07/2016 -		•									
Documents	End Date 05/07/2021 -		•			Pro	cess					
	Period 60 🗘 *					8	Add Part Indus	ion				
Held History	Period Type Months	¥ *					BOM					
Thore is the y	Department Sales Department						Add BOM Inclus	sion				
	Contract Manager Bianca Du Toit					-4	Craft Add Craft Indu	ision				
Suspend History	Salesman Bianca Du Toit	••				4	Service	durino.				
	Aggregate Billing						Delete					
	Hide Fee Detail					9	Delete Indusion	n				
						-	Link Fee					
Processing							Link Pee to this	Indusion 🗸				
rocessing												
Involces												
Credit Notes												
	·											
	Contract Info Customer Info Billing Info Benj	tal Info										
	Consider and Costanter and Bailing and Ren	01111	4									
Open Windows 🔻									User : Bianca 03/02	2023 Version	: 2.5.1.4 Exa	mple Company

#### Add Part Inclusion

• Click on *Part* - Add Part Inclusion.

\$ <u>*</u>			Ма	ntena	nce for Co	ntract No. : CO000	0041 - Statu	: A - BP	'0: Ven	ion 2.5.1.4 -	Examp	ple Comp	any				- @ X
Home Equipment	/Locations Contrac	t Finance / HR Inw	entory Mainte	hance /	Projects	Manufacturing	Procurement	Sales	s Si	rvice Rep	orting	Utilities	1				- 8 ×
💾 🔮 📖																	
Save Back Save Layout	Workspaces																
Process "Forma	t a																$\diamond$
Links #	Contract Info		8														Use
Enter text to search P				Pa	rtCode	Description	SerialN	A	ssetReç	No Location	Desc I	Location		ShippingAddress	COSAccoun	SLAHours	TraveRadiu
Functions	Contract No	CO0000041		۹ ا		<ul> <li>O:</li> </ul>	( <b>D</b> )	4	<b>.</b>	• <b>D</b> :		0		(D)	( <b>D</b> )	-	- Ined
Life	Contract Type	Cost Per Copy	• •	• 🗄	SP2020	SP2020 Sprint Colou	r 2020-1	3050 A	REGOOO	046		Reception		25 Lonestar Road, Ranchville,	2100	24.00	
Basec	Contract Class		•		Item Fe	es Item Meters	Item Inclusion	Item	Contac	5							
8	Contract Category	05/07/2016 -	•		+ Looe		Descripti	n		SLAType	Q	Juantity	reetype				
Documents	End Date	05/07/2016 +			_					rocess							
	Period	60 *								Part Add Part I	indusion	n					
	Period Type	Monthe							- 1	BOM		-					
Hold History	Department	Sales Department	••							Add BOM	Inclusio	on					
	Contract Manager	Bianca Du Toit	•							Craft Add Craft	Indusio	ion					
Suspend History	Salesman	Bianca Du Toit	• •							Service							
	Aggregate Billing									<ul> <li>Add Servi</li> <li>Delete</li> </ul>	ce Indu	JSION					
	Hide Fee Detail									Delete Inc	lusion						
										Link Fee to	this In	ndusion					
Processing																	
Invoices																	
Credit Notes																	
	Contract Info Cu	stomer Info Billing Info	Rental Info														
Open Windows 🔻														User : Bianca 03/02,	2023 Version	: 2.5.1.4 Exa	ample Company

- An Input Validation message box will pop up asking:
  - Are you sure you want to add a part inclusion to this item [Serial Number or Location Description]?
- Click on Yes.



ф т			Ma	intena	nce for C	ontract No. : CO00000	41 - Status : A	BPO: Version	2.5.1.4 - Exai	nple Comp	bany				- B X
Home Equ	pment / Locations Contrac	t Finance / HR Inve	entory Mainte	nance /	Projects	Manufacturing P	ocurement S	ales Servic	e Reportin	g Utilitie	ts				- & ×
💾 🔥 📑															
Save Back Save La	b Workeparer														
	*														
Process _	Format 4														
Links	Contract Info		3												Use
Enter text to search	<i>p</i>			Pa	rtCode	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TravelRadik.
Functions	Contract no	00000041		T 10	c	( <b>D</b> )	1 <b>0</b> :	1 <b>0</b> 0	1 <b>0</b> 0	1 <b>0</b> 0		( <b>D</b> :	1 <b>0</b> 0	-	- 2
Life	Contract Type	Cost Per Copy	•	• 🗉	SP2020	SP2020 Sprint Colour	2020-103050	AREG000046		Reception	1	25 Lonestar Road, Ranchville,	2100	24.00	
Base	Contract Class		•		Item Fe	ees Item Meters Ib	m Indusions [	tem Contacts							
BI	Contract Category		Ŧ		Code		Description		SLAType	Quantity	FeeType				
Bocuments	Start Date	05/07/2016 💌													
	End Date	05/07/2021 -		•											
	Period	60 🗘 *													
Hold History	Period Type	Months	• •		Inp	ut Validation				<					
	Department	Sales Department	* *			-									
	Contract Manager	Bianca Du Toit	• •			Are you sure you 2020-103050?	want to add a p	part inclusion t	o this item -						
Suspend History	Salesman	Bianca Du Toit	•			-									
	Aggregate Billing						1	Vec	No						
	Hide Fee Detail							107							
Processing															
Invoices															
Credit Notes															
	Contract Info Cu	ustomer Info Billing Info	Rental Info	۰.											+
Open Windows 🕶												User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

- A *Select a part* screen will pop up.
- Click on the *row selector* in front of the *part* you wish to *add* to this contract as an *inclusion*
- Click on *Ok*.

Home Equipment	/Locations Contract Finance /HR Inventory Workspaces	Mai v Mainter	ntenance for ( nance / Projects	Contract No. : CO00000 Manufacturing Pi	41 - Status : A rocurement S	BPO: Version ales Service	2.5.1.4 - Exar Reportin	mple Company g Utilities						- 8 × - 8 ×
Links #	Contract Info	4												Le la
Enter text to search P			PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	0	OSAccoun	SLAHours	TraveRadic 8
Functions	Contract No CO0000041		* + <b>0</b> :	(D)	•0:	(D)	* <b>D</b> :	1 <b>0</b> :		1 <b>0</b> :		0:	-	- 100
LIFE	Contract Type Cost Per Copy	• •	▶ 🖂 SP2020	SP2020 Sprint Colour .	2020-103050	AREG000046		Reception		25 Lonestar Road,	Ranchville, 2	2100	24.00	
m Notes	Contract Class	•	Item I	Fees Item Meters Ite	m Indusions []	em Contacts								
d Bi	Contract Category	Ŧ	Cod	e	Description		SLAType	Quantity Fee	eType					
Duil	Start Date 05/07/2016 •		•											
Documents	End Date 05/07/2021 *		•											
	Period 60 🗘 *			- Coloct a past										
Hold History	Period Type Months	••		Hame										
	Department Sales Department	• •		Home F										
	Contract Manager Bianca Du Toit	••	J	S S S	20									
Suspend History	Salesman Biaora Du Toit			Ok Back Save	Layout									
	Angregate Billing			Process _ For	mat							~		
	Hide Fee Detail	2										/		
		-		PartCode Descrit	ation		Rate	Status	PartType	CatDescription	TaxType	w		
Processing				* 10: 10:			-	10:	100	10:	10:	-		
rocessing				CHA001 Chair				15.00 A	с	Accessories	VAT	0		
Invoices		0		▶ 26789-101 101 Bk	ack Toner			15.00 A	с	Toners	VAT			
		-		20-753 SP202	0 Fuser Unit			15.00 A	С	Spare Parts	VAT			
				X821932-002 Micros	oft Mouse			15.00 A	A	Accessories	VAT			
Credit Notes				SP500 Sprint	Colour Copier			15.00 A	A	Hardware	VAT			
				500-14/K SP500	biack toner			15.00 A	c	Stationery	VAT			
				4				10100 11		station of y		+		
	Contract Info Customer Info Billing Info Re	ental Info	4											•
Open Windows 🕶										User : Bia	inca 03/02/202	23 Version	: 2.5.1.4 Ex	ample Company

• The selected part will be **added** to the **Item Inclusion** frame.



- *Code:* This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- *SLA Type:* This field will auto populate with the SLA type of the selected item.
- *Quantity:* Type in the quantity included for the selected part.
- *Fee Type:* This field will only be populated if you link a fee to the inclusion.



#### Add Bill of Materials Inclusion

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- The *Process* menu will pop up.
- Click on **BOM** Add BOM Inclusion.



<b>\$</b> _*		Ма	ntenance for C	ontract No. : CO000004	1 - Status : A	- BPO: Vers	on 2.5.1.4 - Exa	imple Comp	əany				- BX
Home Equipment	t / Locations Contract Finance / HR Inventory	Mainte	nance / Projects	Manufacturing Pro	curement	Sales Ser	vice Reportir	ng Utilitie	IS				- 8 ×
💾 🕒 🔣													
Save Back Save Layout	Workspaces												
Process Form	•												\$
¿ Links #	Contract Info	8											Use
Enter text to search P			PartCode	Description	SerialNo	AssetRegt	lo LocationDes	c Location		ShippingAddress	COSAccoun	SLAHours	TraveRadiu
Functions	Contract No CO0000041		<b>۲</b> (D:	(0)	-O-	- <b>D</b> :	1 <b>0</b> :	1 <b>0</b> :		(D):	(D)	-	-
5	Contract Type Cost Per Copy	•		SP2020 Sprint Colour	2020-10305	AREGODOO	46	Reception		25 Lonestar Road, Ranchville,	2100	24.00	
D Notes	Contract Class	٣	Item F	ees Item Meters Iter	n Indusions	Item Contacts							
ed Bi	Contract Category	•	9 Code		Description		SLAType	Quantity	FeeType				
ing	Start Date 05/07/2016 -		•		L		1						
Documents	End Date 05/07/2021 -		•				Bask						
	Period 60 🗘					1	Add Part Indu	sion					
Hold History	Period Type Months	• •				- F	BOM						
	Department Sales Department	• •					Cent	10101	-				
	Contract Manager Bianca Du Toit	• •					Add Craft Ind	usion					
Suspend History	Salesman Bianca Du Toit	• •					Service	urk unione					
	Aggregate Billing						<ul> <li>Delete</li> </ul>	KUNDAUT					
	Hide Fee Detail						Delete Indusio	m					
							Link Fee	a Taskusian					
Processing						_	- DIKTEE to UI	S ETIQUSION	¥				
Invoices													
Credit Notes													
	Contract Info Customer Info Billing Info Rent	al Info	4										
Open Windows 🕶										User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

- An Input Validation message box will pop up asking:
  - Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??
- Click on Yes.

ф. т.	_			Ма	inter	ance for Co	ntract No. : CO000004	l - Status : A	- BPO: Version	2.5.1.4 - Exan	ple Com	pany			6	- PX
Home	Equipment	/Locations Contract	t Finance / HR Invent	ory Mainte	nance	/ Projects	Manufacturing Pro	curement	Sales Service	e Reporting	Utiliti	es				- & ×
19 😋	2															
Save Back	Save Layout	Workspaces														
Process 4	Forma	at a														$\sim$
Links		Contract Info		4												Us
Enter text to se	sarch P				F	artCode	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TraveRadic 2
<sup>6</sup> Functions		Contract No	CO0000041		۰,	<b>.</b>	(D)	* <b>0</b> :	(D)	* <b>0</b> ¢	8 <b>0</b> 0		1 <b>0</b> :	1 <b>0</b> 0	-	- <u>ñ</u>
Life		Contract Type	Cost Per Copy	- ·	۶E	SP2020	SP2020 Sprint Colour	2020-10305	50 AREG000046		Receptio	n	25 Lonestar Road, Ranchville,	2100	24.00	
B Notes		Contract Class		-		Item Fe	es Item Meters Item	Indusions	Item Contacts							
ed Bi		Contract Category		*		9 Code		Description		SLAType	Quantity	FeeType				
ling		Start Date	05/07/2016 -			26789	-101	101 Black Tor	ner	PART		2				
Documents		End Date	05/07/2021 *			•										
		Period	60 🗘 *		٠											
Hold Minton		Period Type	Months			Inpu	t Validation			;	<					
The field of	,	Department	Sales Department	••												
		Contract Manager	Bianca Du Toit	• •			Are you sure you v	vant to add a	BOM inclusion t	o this item -						
Suspend His	istory	Salesman	Bianca Du Toit	- •			2020-105050:									
		Aggregate Billing														
		Hide Fee Detail							res	No						
Processing	a															
	<i>,</i>															
Invoices																
Credit Note	es															
		Contract Info	stoner lefe Blice lefe	Dental Jofe												
		Consaccinto Cu	asome and billing the	Nernar Into	4 0											÷
Open Windows *													User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

- A Select a bill of material screen will pop up.
- Click on the *row selector* in front of the *BOM* you wish to *add* to



this contract as an *inclusion*.

• Click on Ok.

Home Equipment Equipment Equipment Save Back Process Forma	Locations Contract Finance / HR Inventor	Mainten	ntenance for Co ance / Projects	ontract No. : CO0000041 Manufacturing Pro	l - Status : A curement !	- BPO: Version Sales Servic	2.5.1.4 - Exp e Reporti	ample Com	pany es				- 8 ×
Links #	Contract Info	#											
Enter text to search P			PartCode	Description	SerialNo	AssetRegNo	LocationDes	c Location		ShippingAddress	COSAccoun	SLAHours	TraveRadic
Functions	Contract No CO0000041		1 (0)	( <b>D</b> :	(0)	-O-	-D:	-0:		10:	-O-	-	-
	Contract Type Cost Per Copy	• •	E SP2020	SP2020 Sprint Colour	2020-103050	AREG000046		Receptio	n	25 Lonestar Road, Ranchville,	2100	24.00	0
Notes	Contract Class	•	Item Fi	es Item Meters Item	Indusions	Item Contacts							
i.	Contract Category	•	Code		Description		SLAType	Quantity	FeeType				
	Start Date 05/07/2016 •		2678	9-101	101 Black Tone	er	PART		2				
Documents	End Date 05/07/2021 *		•										
	Period 60 *		e 🔤 🖳 Sele	ct a bill of material							< )		
	Region Type Mantha		Home										
Hold History	Department Coles Department			A 5									
	Sales Department	· .											
Conversion of the Association of	Contract Manager Bianca Du Toit		OK	Back Save Layout									
Susperio History	Salesman Bianca Du Toit		Proce	ess "Format "							$\approx$		
	Aggregate Billing 🗌 📀 💈		Dran a c										
	Hide Fee Detail 🗌		BOMO	ode Description			B	OMType	ROMTypeDesc		-		
			Y 10:	0:			1	]: ]:	0:		*		
Processing			MCL	Machine ser	vice - deaning		D	ASK	Maintenance Part List				
			TONE	RS Toners Indu	ded		c		Contract Inclusion				
Invoices			KM14	7 KM147 Part	List		P	ARTS	Part List		0		
			KZN1	23 KZN 123 Par	t List		P	ARTS	Part List				
			BINM	AINT Bin Maintena	ance		T	ASK	Maintenance Part List				
Credit Notes			AirMa	int Airfreshner	Parts List for m	aintenance	Т	ASK	Maintenance Part List				
			SP 19	12 SP 19-12 Par	tList		Pi	ARTS	PartList				
			SP19	12PM SP 19-12 Pro	gect Methodolo	Natural Daw in	Pl	м	Project Methodology		-		
						A COLORADO							
	Contract Info Customer Info Billing Info Re	ental Info											+
nan Windows w										User ( Biseco ) 02/02	DODD Mercine		cample Company

- The selected **BOM** will be added to the **Item Inclusions** frame.
- *Code:* This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- *SLA Type:* This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected BOM.
- *Fee Type:* This field will only be populated if you link a fee to the inclusion.



٩	Ŧ									Mai	nten	ance for Co	ntract No. : CO0000	041 - Status :	A - BPO: Version	n <b>2.5.1.4</b> - Exai	mple Company				- B X
	۵.	Home	Equip	ment / L	ocations	Contract	Finance	e/HR Im	ventory	Mainter	nance	/ Projects	Manufacturing	Procurement	Sales Servio	ce Reportin	g Utilities				- & ×
B	4	3	5																		
~	ive	Dack	Save Lay	out w	Trispaces																
_	Process			ormat																	$\diamond$
ð	Links			4 (	ontract Info	<b>)</b>				#											Le Co
0 geo	Enter	text to si	earch	2							P	artCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TravelRadit.
č.	Fun	ctions			Contr	act No	CO0000041					:	(D)	<b>10</b> :	(D)	* <b>D</b> ¢	( <b>0</b> :	(0)	1 <b>0</b> 4	-	- fine
Ę	-			_	Contract	Туре	Cost Per Co	ру		• •	) E	SP2020	SP2020 Sprint Colour	2020-1030	50 AREG000046		Reception	25 Lonestar Road, Ranchville,	. 2100	24.00	
Bas	N	otes			Contract	Class				*		Item Fe	es Item Meters I	tem Indusions	Item Contacts						
ed Bil				11	Contract Cal	tegory				*		9. Code		Description		SLAType	Quantity FeeType				
Ing					Star	t Date	05/07/2016	-				26789	-101	101 Black To	oner	PART	2				
_	2				Ene	Date	05/07/2021	*				TONE	RS	Toners Indu	ided	BOM	1				
						Period		60 🗘 *				*									
	14	old Histor	TV		Perio	d Type	Months			••	•										
					Depar	tment	Sales Depart	tment		••											
					Contract Ma	nager	Bianca Du Tr	nit.		<b>.</b> .											
	S	uspend H	listory		Sale	esman	Risson Du Te	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		÷.											
					Accession	Pilling	1														
					Nygregate	oning E	-														
					nide ree	Detail	1														
	Pro	cessin	g																		
	tr	voices																			
	o	redit Not																			
						_															
					Contract Info	Cus	tomer Info	Billing Info	Rental	Info	4 ⊂										÷
Op	en Win	dows 🕶																User : Bianca 03/02	2/2023 Version	: 2.5.1.4 Exa	mple Company

#### Add Craft Inclusion

- *Right click* anywhere in a row of the Item Inclusions frame.
- The *Process* menu will pop up.
- Click on *Craft* Add Craft Inclusion.

\$ ·		Ma	intenance for C	ontract No. : CO000004	1 - Status : A	- BPO: Versi	on 2.5.1.4 - Exa	ample Comp	any			(	- @ X
Home Equipment	/Locations Contract Finance / HR Inventory	Mainte	nance / Projects	Manufacturing Pro	ocurement	Sales Ser	vice Reportin	ng Utilitie:	3				- 8 ×
💾 😏 🛛													
Save Back Save Layout	Workspaces												
Process a Forma	at a		(										~
Links #	Contract Info	4											User
egate	Contract No CO0000041		PartCode	Description	SerialNo	AssetRegN	b LocationDesc	c Location		ShippingAddress	COSAccoun	SLAHours	TravelRadiu
Functions	Contract Type Cost Per Conv		* (0:		·Q:	10: 10:	10:	Pecention		C:	10:	-	- ā
g Notes	Contract Class		I SP2020	SP2020 Sprint Colour	2020-10305	V AREGUUUU	10	Reception		25 Lonestar Road, Ranchvile,	2100	24.0	,
Ised B	Contract Category	•	9 Code	ees item meters item	Description	rtem contacts	SLAType	Quantity	FeeType				
Illing	Start Date 05/07/2016 -		•				7						
Documents	End Date 05/07/2021 -		•			1	Doct						
	Period 60 🗘 *					8	Add Part Indu	sion					
Hold History	Period Type Months	•					BOM Add BOM Indu	usion					
	Department Sales Department	•					, Craft		1				
	Contract Manager Bianca Du Toit	• •				C	Add Craft Ind	lusion					
Suspend History	Salesman Bianca Du Toit	•				1	Add Service In	nclusion					
	Aggregate Billing					6	Delete						
	Hide Fee Detail						<ul> <li>Delete Indusid</li> <li>Link Eee</li> </ul>	on					
						P	Link Fee to the	is Indusion					
Processing									_				
Invoices													
Credit Notes													
	Contract Info Customer Info Billing Info Renta	Info	۰										
Open Windows 🕶										User : Bianca 03/02	2023 Version	: 2.5.1.4 E	ample Company



- An Input Validation message box will pop up asking:
  - Are you sure you want to add a Craft inclusion to
    - this item [Serial Number or Location Description]?
- Click on Yes.

\$ v		Ma	ntenance fo	r Contract No. : CO000004	1 - Status : A	BPO: Version	2.5.1.4 - Exar	nple Company			G	- B x
Home Equipment	/Locations Contract Finance / HR Inv	ventory Mainte	nance / Project	ts Manufacturing Pro	ocurement S	iales Servio	e Reporting	g Utilities				- 8 ×
💾 👍 🔤												
Save Back Save Layout	Workspaces											
	•											~
Process a Porma												
Enter text to search	Contract Into	*										User
topate	Contract No CO0000041		PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TravelRadit.
Functions	Contract Type Cost Per Cooy		• • • • • • • • • • • • • • • • • • •	COCOCC Carlot Calma	10:		AD:	Perantico	10: 201 secolar David Davidude	100	-	- 2
e p Notes	Contract Class	-	• El SP202	SP2020 Sprint Colour	2020-103050	AREGUUUU46		Reception	25 Lonestar Road, Ranchville,	2100	24.00	
ised	Contract Category		9.0	ode	Description	tem contacts	SLAType	Quantity FeeType				
	Start Date 05/07/2016 *		28	5789-101	101 Black Tone	a.	PART	2				
Documents	End Date 05/07/2021 *		т	DNERS	Toners Include	d	BOM	1				
	Period 60 *		•									
und Materia	Period Type Months	<b>.</b>	•	nput Validation				× 1				
Hold History	Department Sales Department	•										
	Contract Manager Blanca Du Tolt			Are you sure you	want to add a C	Traft inclusion t	o this item -					
Suspend History	Salesman Bianca Du Tolt			2020-103050?								
	Anareaste Billing											
	Hide Fee Detail					Yes	No					
			-									
Descossing												
rocessing												
Invoices												
Credit Notes												
	Contract Info Customer Info Billing Info	Rental Info										+
Open Windows 👻	•								User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

- A *Select a craft* screen will pop up.
- Click on the *row selector* in front of the *craft* you wish to *add* to this contract as an *inclusion*.
- Click on Ok.



\$ <u>*</u>		Mair	ntenanc	e for Con	tract No. : CO0000041	- Status : A	- BPO: Version	2.5.1.4 - Exar	mple Company			C.	- Øx
Home Equipment	t / Locations Contract Finance / HR Inventory	Mainten	ance / Pr	rojects	Manufacturing Proc	urement S	iales Servici	e Reporting	g Utilities				- 8 ×
💾 🔥 🔤													
Save Back Save Lavout	Workmaner												
Process a Form	at 🔺												$\diamond$
Links #	Contract Info	4											Use
Enter text to search P		_ [	PartC	Code I	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TraveRadic 8
Functions	Contract No CO0000041		T 10:		0:	1 <b>0</b> :	(D)	(D)	( <b>0</b> )	(0)	* <b>0</b> ¢	-	- inc
5	Contract Type Cost Per Copy	••	• 🗆 SP	2020	P2020 Sprint Colour	2020-103050	AREG000046		Reception	25 Lonestar Road, Ranchville,	2100	24.00	
m Notes	Contract Class	-		Item Feer	Item Meters Item	Indusions 1	tem Contacts						
sed B	Contract Category	•	4	Code		Description		SLAType	Quantity FeeType				
	Start Date 05/07/2016 *	- 1		26789-1	01	101 Black Tone	a.	PART	2				
Documents	Fed Date of (27/2021			TONERS		Toners Include	d	BOM	1				
				•									
	Period 60 📮 •	_	•	Sele	set a craft				-		x		
Hold History	Period Type Months	••											
	Department Sales Department	••		Home							_		
	Contract Manager Bianca Du Toit	••											
Suspend History	Salesman Bianca Du Toit	••		Ok	Back Save Layou	t							
	Aggregate Billing 🗌			Proc	ess Format						~		
	Hide Fee Detail 🗌 🔗	1											
	• •			Litag a	tolumn neader nere to gr								
Descarcing				Craf	Name CraftDesc		AccountCode	COSAccCode	e				
Processing				* 10:	10:		100	10:			<u>^</u>		
Invoices				ENG	Engineering		1100	2100					
				FIN	Finance Finance		1101	2101					
				MNG	T Macageman		1100	2100			0		
Credit Notes				MNG	Managemen		1100	2100					
				DAG	Paragelier	i intrast	1100	2100					
				REP	Sales Repre	sentative	1100	2100					
				TEO	Technician		1100	2100					
				TRA	/ Travel		1100	2100			0		_
	Contract Info Qustomer Info Biling Info Rental I	ofo											
			-										+
Open Windows *										User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

- The selected *Craft* will be added to the *Item Inclusions* frame.
  - *Code:* This field will auto populate with the code of the selected item.
  - **Description:** This field will auto populate with the description of the selected item.
  - *SLA Type:* This field will auto populate with the SLA type of the selected item.
  - *Quantity:* Type in the number of hours included for the selected Craft.
  - *Fee Type:* This field will only be populated if you link a fee to the inclusion.



¢ . ۲		Ма	intenanc	e for Contract No. : COO	000041 - Status : A	- BPO: Version	2.5.1.4 - Exar	mple Company			C	- @ x
Home Equipment	/Locations Contract Finance / HR	Inventory Mainte	nance / Pr	rojects Manufacturing	Procurement :	Sales Servio	e Reporting	g Utilities				- @ ×
💾 🖒 🛛 🔊												
Save Back Save Layout	Workspaces											
	•											
Process a Forma			1									~~
A Links #	Contract Info	7										User
enter text to search P	Contract No. CONNERS		PartC	Code Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TravelRadik 👳
Functions	Contract no Cooport		₹ 1 <b>0</b> 0	( <b>D</b> :	<b>،</b> ۵۰	<ul> <li>(D)</li> </ul>	1 <b>0</b> 0	×0:	4 <b>0</b> 4	1 <b>0</b> 1	-	- 2
Life	Contract Type Cost Per Copy	• •	) 🖂 SP	2020 SP2020 Sprint C	olour 2020-103050	AREG000046		Reception	25 Lonestar Road, Ranchville,	2100	24.00	
	Contract Class	-		Item Fees Item Meters	Item Indusions	Item Contacts						
BII	Contract Category	•		Code	Description		SLAType	Quantity FeeType				
2 Documents	Start Date 05/07/2016 -			TONERS	Topers Include	er ed	ROM	1				
	End Date 05/07/2021 -			TECH	Technician		CRFT	2				
	Period 60 🗘	•		•								
Hold History	Period Type Months	• •				1						
	Department Sales Department	-			1							
	Contract Manager Blanca Du Tolt	• •										
Suspend History	Salesman Bianca Du Toit	- •										
	Aggregate Billing											
	Hide Fee Detail											
Brococcing												
Processing												
Invoices												
Credit Notes												
	Contract to fair of the Other	- Tafa Danial Tafa										
	Contract Info Customer Info Billin	g Into Kental Into	<b>ا</b>									+
Open Windows 🕶									User : Bianca 03/02,	2023 Version	: 2.5.1.4 Exa	mple Company

#### Add Service Inclusion

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- The *Process* menu will pop up.
- Click on *Service* Add Service Inclusion.

Home Equipment	t/Locations Contract Finance/HR Inventory	Ma Mainte	intenance for C nance / Projects	Contract No. : CO000004 Manufacturing Pro	1 - Status : A	A - BPO: Vers Sales Se	ion 2.5.1.4 - Exa	<b>mple Comp</b> g Utilitie	<b>any</b> s			(	- 8 ×
Save Back Save Layout	Workspaces												
Links 4	Contract Info	8	Drag a column h	eader here to group by th	at column								
Enter text to search P			PartCode	Description	SerialNo	AssetReg	lo LocationDesc	Location		ShippingAddress	COSAccoun	. SLAHours	TraveRadiu
Functions	Contract No CO0000041		9 IO:	<ul> <li>••••</li> </ul>	(0)	- <b>O</b> -	1 <b>0</b> :	1 <b>0</b> 0		1 <b>0</b> 0	( <b>D</b> )	-	-
Life	Contract Type Cost Per Copy	•	▶	SP2020 Sprint Colour	2020-1030	50 AREGODO	46	Reception		25 Lonestar Road, Ranchville,	2100	24.00	0
B Notes	Contract Class	•	Item F	ees Item Meters Iter	m Inclusions	Item Contact							
d Bill	Contract Category	•	< Cod		Description		SLAType	Quantity	FeeType				
3	Start Date 05/07/2016 -		•		L		rocess						
Documents	End Date 05/07/2021 -		•				Part						
	Period 60 🗘 *						Add Part Indu	sion					
Hold History	Period Type Months	• •					BOM						
	Department Sales Department	• •					AUG DOM INCO	5001					
	Contract Manager Bianca Du Toit	• •					Add Craft Ind	usion					
Suspend History	Salesman Bianca Du Toit	<b>*</b> *					Service Add Service In	dusion					
	Aggregate Billing 🗌					. b	Delete	_	1				
	Hide Fee Detail						Delete Inclusio	n					
							Link Fee	Indusion					
Processing									1				
Invoices													
Credit Notes													
	Contract Info Outcomer Info Billing Info Ba	tal Info											
	Contract and Costonier and Billing and Ker	10	4										÷
Open Windows 🔻										User : Blanca 03/02	2023 Version	1:2.5.1.4 Ex	ample Company



- An *Input Validation* message box will pop up asking:
  - Are you sure you want to add a Service inclusion to this item [Serial Number or Location Description]?
- Click on Yes.

\$ <u>*</u>			Mair	tenance	e for Conl	tract No. : CO0000	041 - Status :	A - BPO: Version	n 2.5.1.4 - Exa	nple Com	ipany			G	- P x
Home Equipment	nt / Locations Contract	Finance / HR Inventory	Mainten	ance / Pro	ojects	Manufacturing	Procurement	Sales Servio	ce Reportin	g Utilit	ies				- 8 ×
Save Back Save Layout	Workspaces														\$
a Linke a	Contract Info													1/2	
Enter text to search	Contract Into														200L
pate	Contract No. COO	000041		PartCi	iode (	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TraveRadi.
Functions	Contract Type Cost	Der Copy		* *0:	1	0:	10:	* <b>0</b> :	×0:	10:		10:	* <b>0</b> ¢	-	- 2
e Notes	Contract Type Cost	Per Copy		• 🖻 SP:	2020 9	P2020 Sprint Colour	2020-103	050 AREG000046		Recepto	n	25 Lonestar Road, Ranchville,	2100	24.00	
ased	Contract Category		- 1		Item Fees	Item Meters	tem Indusions	Item Contacts	CI ATupo	Quantitu	EesTurne				
Billin	Contract Category		·		26789-1	01	101 Black T	oper	PART	Quartury	2				
2 Documents	start Date 05/0	//2016 •			TONERS		Toners Ind	uded	BOM		1				
	End Date 05/0	7/2021 •			TECH		Technician		CRFT		2				
	Period	60 🗘 *	_	,	_					_					
Hold History	Period Type Mont	ths	••	•	Input V	alidation				×					
	Department Sales	s Department	• •												
	Contract Manager Bland	ca Du Toit	••		(?	Are you sure yo 2020-103050?	u want to add	a Service inclusion	n to this item -						
Suspend History	Salesman Blan	ca Du Toit	••		<u> </u>										
	Aggregate Billing 🗌							Ver	No						
	Hide Fee Detail 🗌							162	INO						
Processing															
Invoices															
Credit Notes															
	Contract Info Custome	er Info Billing Info Rental	Info												
Open Windows 🔻		-		4								User : Bianca 03/02	2023 Version	: 2.5.1.4 Exa	mple Company

- A *Select a service* screen will pop up.
- Click on the *row selector* in front of the *service* you wish to *add* to this contract as an *inclusion*.
- Click on Ok.



Home Equipment	/ Locations Contract Finance / HR Inventory	Mai Mainter	ntenance f iance / Proje	for Contract No. : ects Manufact.	CO0000041 - Status : A ring Procurement	- BPO: Version Sales Servici	2.5.1.4 - Exan Reporting	nple Compa ) Utilities	iny					6	_ & ×
Back Save Layout	Workspaces														6
Links 4	Contract Info	#													
Enter text to search P			PartCod	e Description	SerialNo	AssetRegNo	LocationDesc	Location			ShippingAddress	5	COSAccoun	SLAHours	TraveRadu
Functions	Contract No CO0000041		* (D:	-0-	·O:	-O:	(D)	×0:			10:		-O:	-	-
	Contract Type Cost Per Copy	• •	▶ E SP20	120 SP2020 Spr	int Colour 2020-10305	0 AREG000046		Reception			25 Lonestar Roa	ad, Ranchville,	2100	24.00	
Notes	Contract Class	•	It	tem Fees Item M	leters Item Inclusions	Item Contacts									
	Contract Category	*	٩,	Code	Description		SLAType	Quantity	FeeType						
	Start Date 05/07/2016 *			26789-101	101 Black Tor	ier	PART	2							
Documents	End Date 05/07/2021 -			TONERS	Toners Induc	led	BOM	1							
	Period 60 1		-	TECH	Technician		CRFT	2							
	Period Type Months	<b>.</b> .	•												
Hold History	Department Color Department		•												
	Contract Manager Research Talk			Select a service											
Suspend History	Colorest Barca Du Tol		H	ome											
	Salesman Bianca Du Toit	· ·			51										
	Aggregate Billing			ok Back S	ave Layout										
	Hide Fee Detail														
				Process "	Format 🖌							6	>		
Processing	2		Dra												
Tougland				ServiceCode Ser	viceDescription	Type	Class	Rat	te	Units	TaxType	TaxCode	т		
anvoicea			<b>Y</b>	0: 0:		• <b>D</b> :	10:	-		1 <b>0</b> 0	·0:	·0:	î.		
				STCD Sho	rt Term Contract Deposit	EXT	SER		10.00	ea	VAT	1			
Credit Notes				INST Ins	tallation Fee	INT	SER		350.00	ea	VAT	1			
	0-			DEL Del	very nee ler Service Fee	INT	SER		350.00	ea	VAT	1			
				SET Set	tements	INT	SER		500.00	ca	VAT	1			
													*		
						_	_	-	_	-		,			
	Contract Info Customer Info Billing Info Re	ntal Info													+
en Windows 🔻											Liger -	Bianca 03/02/	023 Version	: 2.5.1.4 Eva	mole Compa

- The selected *Service* will be added to the *Item Inclusions* frame.
  - *Code:* This field will auto populate with the code of the selected item.
  - **Description:** This field will auto populate with the description of the selected item.
  - *SLA Type:* This field will auto populate with the SLA type of the selected item.
  - *Quantity:* Type in the quantity included for the selected Service.
  - *Fee Type:* This field will only be populated if you link a fee to the inclusion.



ф_ <u>т</u>		Ма	ntenance f	or Contract No. : CO000004	1 - Status : A	- BPO: Version	2.5.1.4 - Exar	nple Company			G	. e x
Home Equipment	/Locations Contract Finance / HR Inventory	Mainte	nance / Proje	cts Manufacturing Pr	ocurement	Sales Servic	e Reporting	) Utilities				- 8 ×
💾 📀 🛛 🖾												
Save Back Save Layout	Workspaces											
Process Form	at											
E Links #	Contract Info	4	Drag a colur	nn header here to group by th	at column							Ug
Enter text to search P			PartCode	e Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TraveRadik 2
Functions	Contract No CO0000041		* ID:	(D)	<ul> <li>(0)</li> </ul>	<d:< th=""><th><ul> <li>Image: Control of the second se</li></ul></th><th>×0:</th><th>(<b>D</b>:</th><th>1<b>0</b>0</th><th>-</th><th>- 10</th></d:<>	<ul> <li>Image: Control of the second se</li></ul>	×0:	( <b>D</b> :	1 <b>0</b> 0	-	- 10
LIE	Contract Type Cost Per Copy	• •	▶ 🖽 SP202	20 SP2020 Sprint Colour	2020-10305	0 AREG000046		Reception	25 Lonestar Road, Rand	hvile, 2100	24.00	
m Notes	Contract Class	*	Ite	em Fees Item Meters Ite	m Indusions	Item Contacts						
ed Bi	Contract Category	*	9.0	Code	Description		SLAType	Quantity FeeT	Гуре			
ing	Start Date 05/07/2016 •			26789-101	101 Black Tor	ner	PART	2				
Documents	End Date 05/07/2021 -		1	TONERS	Toners Indud	led	BOM	1				
	Period 60 1			TECH	Technician		CRFT	2				
	Period Type Months			vel.	Delivery Fee		SERV	1				
Hold History	Department Sales Department				<u> </u>			_				
	Carbon de Managero III - D. E. II	<u> </u>	•									
Surpand Mictory	Contract Planager Bianca Du Toit	-										
Subjection filation y	Salesman Bianca Du Toit	•										
	Aggregate Billing											
	Hide Fee Detail											
Processing												
Invoices												
Credit Notes												
	Contract Info Customer Info Billing Info Rent	al Info										
			< ⊂									+
Open Windows *									User : Bianca	03/02/2023 Version	: 2.5.1.4 Exa	nple Company

Note: You can add more than one of each type of item inclusion to the contract.

#### Link a Fee to an Inclusion

- Right click in the row of the item inclusion that you wish to link a fee to.
  - In this image *IT Technician* has been selected.
- The *Process* menu will pop up.
- Click on *Link Fee* Link Fee to this Inclusion.



Home Equipment	/Locations Contrac	t Finance / HR Inventory	Mainter	ntenan ance / F	nce for Co	Nanufacturing Pro	1 - Status :	A - BPO: Version	2.5.1.4 - Exa	mple Comp	any				- 8 x
Save Back Save Layout	Workspaces	A TRACTIC TRACT	- Carroen	unce ( i	- rojecto	industrial and a second s			e neporar	y ourse					<u> </u>
> Links #	Contract Info		4	Drag a	column hea	ader here to group by th	at column								F
Enter text to search P				Part	tCode	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TravelRadk
Functions	Contract No	CO0000041		T 10:		0	-0:	0	×0:	-0:		0	× <b>O</b> ¢	-	- dina
5	Contract Type	Cost Per Copy	• •	• 🗆 5	SP 2020	SP2020 Sprint Colour	2020-1030	50 AREG000046		Reception		25 Lonestar Road, Ranchville, .	. 2100	24.00	
m Notes	Contract Class		*		Item Fee	s Item Meters Iter	n Indusions	Item Contacts							
ed B	Contract Category		•		۹. Code	1	Description		SLAType	Quantity	FeeType				
lling	Start Date	05/07/2016 •			<ul> <li>26789</li> </ul>	-101	101 Black To	oner	PART	2					
Documents	End Date	05/07/2021 -			TONER	S	Toners Indu	ided	BOM	1	Process	^			
	Period	50 * *			TECH		Technician		CRFT	2	Part Add Part	t Indusion			
	Bariad Turna	therefore			DEL		Delivery Fer	2	SERV	1	BOM				
Hold History	Period Type	Montris	-		•					_	Add BO	M Indusion			
	Department	Sales Department	_	•							Craft	-O Texturing			
A	Contract Manager	Blanca Du Toit	••								- Add Cri	Inclusion			
Suspend History	Salesman	Bianca Du Toit	• •								P Servic Add Servic	e vice Inclusion			
	Aggregate Billing										👝 Delete				
	Hide Fee Detail										Delete I	indusion			
											Link Fe	e to this Tock size			
Processing											LINE C				
Invoices															
Credit Notes															
	Contract Info	stems lefe Billes lefe Deet	al Tofo												
	Consaccinto Cu	asomer and caling into Kenta	a 1110	•											•
Open Windows 🕶												User : Bianca 03/02	2023 Version	: 2.5.1.4 Exa	mple Company

- A *The Fee Lookup List* screen will pop up.
- Click on the *row selector* in front of the *fee* you wish to *add* to this *inclusion*.
- Click on *Ok*.
- Note: Only the fees that you selected in the Item Fees Frame will be displayed in this screen, and the fee can only be linked to one inclusion.





- The *The Fee Type* field will be populated with the selected fee type.
  - In this image, S Service was selected, since the selected inclusion is covered by the Service Fee, in this example.

<b>\$</b> -					Mai	itena	nce for Co	ntract No. : CO000001	- Status :	A - BPO: Version	2.5.1.4 - Exar	nple Com	pany				- 8 x
- 🗘	Home	Equipmen	t / Locations Contrac	t Finance / HR Inventory	y Mainter	ance /	Projects	Manufacturing Pro	curement	Sales Servic	e Reporting	) Ublib	es				_ & ×
	<b>(</b> )	51															
Save	Back	Save Lavout	Workspaces														
bure	book.	Save cayour	Ŧ														
Proc	ess 4	Form	sat _														
g Lini	ks	4	Contract Info		4												Us
Entr	er text to se	earch P				Par	tCode	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TravelRadit 2
E F	unctions		Contract No	CC0000016		t 10		( <b>D</b> )	1 <b>0</b> 0	<ul> <li>Image: Comparison of the second second</li></ul>	1 <b>0</b> 4	e <b>l</b> ic		1 <b>0</b> 0	8 <b>0</b> 0	-	- 5
5			Contract Type	Cost Per Copy	• •	• 🗉	SP 19-12	SP 19-12 Colour Copier	SP19-1218	5		Reception	n	658 Dime Road, South Riding, ,.	2101	8.00	)
t Bas	Notes		Contract Class		•		Item Fee	es Item Meters Item	Indusions	Item Contacts							
ed Bi			Contract Category		•		9 Code		Description		SLAType	Quantity	FeeType				
ng i			Start Date	13/06/2014 💌			TONER	S	Toners Indu	ded	BOM		1 S				
_			End Date	13/06/2019 -			► DEL		Delivery Fee		SERV		1				
			Period	60 1			TECH		Technician		CRFT		2				
			Period Type	Months			20709	-101	101 Black To	ner	PARI		2				
	Hold Histor	ry	Department	Color Department			•		1	_						-	
			Department	sales Deparement	_	•											
	Comments.		Contract Manager	Carolina Suzzetta Lourens van d	le •												
	suspendin	istory.	Salesman	Belinda Sharman	••												
			Aggregate Billing														
			Hide Fee Detail														
Р	rocessin	g															
		-															
	Credit Note	es															
			Contrastinte O	alaria de altra la de	and the first												
			Contract Info C.	istomer into dilling Info Re	entai info	•											
Open W	Vindows 🕶													User : Bianca 03/02	2023 Version	: 2.5.1.4 Exa	ample Company

#### View the linked Inclusion on the Fee Detail

*Note:* that for this step you will need to save the contract first and then come back to view the Fee's linked Inclusion.

- Click on the *Item Fees* frame.
- Click on the *Expand* button on the fee you linked to an inclusion.
- The *Fee Inclusions* frame will be displayed.
- You can now view the details of the inclusion.
- You can change the *Quantity* of the inclusion in this frame if required.



Home Equipment	/Locations Contract	t Finance / HR Inventory	Mainte	intenai nance /	nce for C	Contract Manu	No. : CO00001 Ifacturing I	016 - Status : A Procurement	A - <b>BPO: Versio</b> Sales Serv	in 2.5.1.4 - Ex	ample Comp	any s					- 8
Links #	Contract Info		4	Drag a	a column í	neader he	re to group by	that column									
Enter text to search P				Par	rtCode	Descri	ption	SerialNo	AssetRegNo	LocationDe	sc Location		ShippingAddr	ess	COSAccour	SLAHours	TraveRada
Functions	Contract No	CO0000016		+ 10	e.	( <b>D</b> )		·0:	(D)	<ul> <li>C</li> </ul>	* <b>0</b> :		10:		-O-	-	-
	Contract Type	Cost Per Copy	• •	• 🖂	SP19-12	SP 19-	12 Colour Copie	r SP 19-1218	5		Reception		658 Dime Roa	ad, South Riding,	, 2101		8.00
Notes	Contract Class		•	1	I tem F	ees It	em Meters I	tem Indusions	Item Contacts								
	Contract Category		*		A Mark	oed	FeeType	FeeTypeDesc	ChargeAmo	AccountCode	COSAccoun	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle
	Start Date	13/06/2014 *			۴		- <b>D</b> -	* <b>0</b> ¢	-	(D)	* <b>0</b> ¢	10c	-	-	-	-	
Documents	End Date	13/06/2019 *			Đ		E	Evergreen	0.000	1202	2202		13/06/2014	13/06/2019	60	Months	Months
	Period	60 *			Œ		1	Inhouse Re	0.000	1201	2201		13/06/2014	13/06/2019	60	Months	Months
	Period Type	Months			<b>.</b>		L	Loan	0.000	1200	2200		13/06/2014	13/06/2019	60	Months	Months
Hold History	December 20	Pione is	÷.		E	M	N	Insurance Deals Deated	450.000	1203	2203	Monthly Insurance F	13/06/2014	13/06/2024	60	Months	Months
	Department	Sales Department	-			-	R	Standard P	0.000	1204	2204		13/06/2014	13/06/2019	60	Months	Months
	Contract Manager	Carolina Suzzetta Lourens van de	. • •	0	N B	1	S	Service	750.000	1101	2101	Monthly Service Fee	13/06/2014	13/06/2024	60	Monthe	Monthe
Suspend History	Salesman	Belinda Sharman	• •			Eee Inc	heinen	Del Vice	7001000			namely service rec	10/00/1011	10/00/2021		- North D	
	Aggregate Billing			0		9 SLAT	vpe Code	Description	Quantity								
	Hide Fee Detail					► BOM	TONERS	Toners Include	ed 1								
Processing					m	-	w	Denew Fee	1,200.00	1101	2101		12/06/2014	13/06/2019	60	Monthe	Monthe
Invoices Credit Notes				•	4												•
	Contract Info Cu	stomer Info Billing Info Renti	al Info	4 -													-
n Windows 🕶													Use	r : Bianca 03/0	02/2023 Versi	on : 2.5.1.4	Example Comp

#### **Delete Inclusion**

- Another option in the *Item Inclusions Process* menu is *Delete* Inclusion.
- Right click in the row of the item inclusion that you wish to delete from the contract.
  - In this image *INST* Installation Fee has been selected.
- The *Process* menu will pop up.
- Click on *Delete* Delete Inclusion.



<b>\$</b> =		Ma	ntenance fo	Contract No. : CO000001	6 - Status : A	- BPO: Version	2.5.1.4 - Exar	mple Company				- (8) X
Home Equipment	/Locations Contract Finance / HR In	ventory Mainte	ance / Project	s Manufacturing Pro	curement :	Sales Servic	e Reporting	g Utilities				- 8 ×
Save Back Save Layout	Workspaces											
	•											~
Process a Porma	fr al											
Enter text to search	contract mio	*										User
egate	Contract No CO0000016		PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccoun	SLAHours	TravelRadiu
Functions	Contract Type Cost Per Copy	<b>.</b> •	• E cono n	2 SD10-12 Celeur Cenier	FD10,12195	-u-	1 <b>U</b> -	Percention	659 Dime Deard, Cauth Didge	2101	-	- <u>a</u>
re gg Notes	Contract Class		, C 3-19-1	Ease then Makers The	5P 19-12103.	These Conductor		Receptor	oso bine Rodu, sodul Riding,	2101	8.00	
Sed E	Contract Category	-	9.0	ide	Description	roem comacca	SLAType	Quantity FeeType				
ling	Start Date 13/06/2014 -		т	ONERS	Toners Include	ed	BOM	1 S				
Documents	End Date 13/06/2019 -		D	1	Delivery Fee		SERV	1				
	Period 60 🗘 *		TE b 20	CH 289-101	Technician	~	CRFT	2				
Hold History	Period Type Months	- •	*	707-101	101 DIBOX TOTA	e.	PART	Process	<u>^</u>			
	Department Sales Department	- •		1	<u> </u>	1		Part     Add Part Inc	tusion			
	Contract Manager Carolina Suzzetta Louren	s van de 🔻 *						BOM				
Suspend History	Salesman Belinda Sharman							Add BOM Inc	dusion			
	Aggregate Billing 🗌							Add Craft In	dusion			
	Hide Fee Detail							Service				
								Add Service	Inclusion			
Processing								Delete Delete Indus	sion			
								🚛 Link Fee				
Invoices								Link Fee to t	his Inclusion 🧅			
Credit Notes												
	Contract Info Customer Info Billing Info	Rental Info	۰									•
Open Windows 🕶									User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	mple Company

- An Input Validation message box will pop up asking:
  - Are you sure you want to delete this item inclusion -[Serial Number or Location Description]?
- Click on Yes.

\$ ·		Mai	ntenance for Co	ntract No. : CO000001	6 - Status : /	A - BPO: Version	2.5.1.4 - Exan	nple Comp	any			C	-)@X
Home Equipment / Li	ocations Contract Finance / HR Inventory	Mainter	ance / Projects	Manufacturing Pro	curement	Sales Servio	e Reporting	utilitie	s				- & ×
Save Back Save Layout We	orkapaces												
Process J Format													$\diamond$
Links # C	Contract Info	#											User
eget ext to search p	Contract No CO0000016	- 1	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location		ShippingAddress	COSAccoun	SLAHours	TravelRadik B
Functions	Contract Type Cost Per Copy		Y 10:	( <b>D</b> ):	10:	1 <b>0</b> 0	×0:	* <b>0</b> :		10:	* <b>0</b> ¢	-	- 2
e Notes	Contract Class	-	• ⊟ SP19-12	SP19-12 Colour Copier	SP19-1218	5		Reception		658 Dime Road, South Riding, ,	2101	8.00	
ased	Contract Category	-	Code	es Item Meters Item	Description	Item Contacts	SLAType	Quantity	FeeType				
alling	Start Date 13/06/2014 •		TONE	RS	Toners Indu	ded	BOM	1	s				
Documents	End Date 13/06/2019 -		DEL		Delivery Fee		SERV	1					
	Period 60 🗘 *		TECH	-101	Technician	0.07	CRFT	2					
Hold History	Period Type Months	••	• 20703	Delete Row	TO LOBOR TO		X	-					
	Department Sales Department	••	•										
	Contract Manager Carolina Suzzetta Lourens van de	••		Are you sure 1	ou want to	delete this item in	nclusion						
Suspend History	Salesman Beinda Sharman	••		20109-1011									
	Aggregate Billing 🗌					Nex							
	Hide Fee Detail 🗌		L			162	NO						
Processing													
tousises													
annonces													
Credit Notes													
	Contract Info Customer Info Billing Info Rental	Info											
Open Windows 🕶										User : Bianca 03/02/	2023 Version	: 2.5.1.4 Exa	ample Company

• The selected item will now be *removed* from the *Item Inclusions* frame.



# Add New Contract - Item Inclusions



Next: Link Contract Item Contacts

NUCL.CTRT.004.008