

We are currently updating our site; thank you for your patience.

CONTRACT

CLOSE CONTRACT

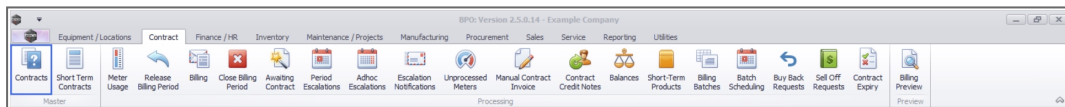
When a contract comes to an end, the contract must be closed and approved.



Refer to "**The Contract Expiry Listing Screen**" on **page 1** for more information relating to efficiently managing contract closure for contracts that are about to expire.

SELECT THE CONTRACT TO CLOSE

Ribbon Select **Contract > Contracts**



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

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

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- Select the **row** of the **contract** that you wish to process.

CLOSE CONTRACT

Click on **Close Contract**.

My Close Contract button is greyed out:

- The contract must be in status **Active**.
- You must have the **security rights** to use this feature.

ContractNo	CustomerC	CustomerName	ContractType	ContractFY	Location	OrderNo	StartDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillTo
CO0000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart.	60	Months	Monthly	3	
CO0000016	TS001	Titan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart.	60	Months	Monthly	4	
CO0000018	SAP001	Samarthas Diner	CPC	Cost Per Co.	Main		06/07/2014	06/07/2019	Sales Depart.	60	Months	Monthly	5	
CO0000019	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart.	60	Months	Bi-annual	6	
PC0000001	DA0002	Dancing Shoes	PRE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart.	60	Months	Monthly	1	
CO0000031	YEO001	Young Electric	CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart.	60	Months	Monthly	1	
CO0000041	PA0001	Panda Capers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart.	60	Months	Monthly	5	
CO0000042	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		07/06/2016	07/06/2021	Sales Depart.	60	Months	Monthly	7	
CO0000043	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		01/06/2016	07/06/2021	Sales Depart.	60	Months	Quarterly	5	
CO0000052	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Con.	Durban Area		26/05/2017	26/05/2022	Sales Depart.	60	Months	Monthly	3	
CO0000054	APP0001	Apple Juice Inc	CPC	Cost Per Co.	Durban Area		03/06/2017	03/06/2022	Sales Depart.	60	Months	Monthly	0	
CO0000072	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart.	60	Months	Monthly	2	
CO0000073	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		26/05/2018	26/05/2023	Sales Depart.	60	Months	Monthly	0	
CO0000074	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart.	60	Months	Monthly	6	
CO0000077	PP0001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart.	60	Months	Monthly	4	
CO0000078	PP0001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart.	60	Months	Monthly	4	
CO0000080	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Durban Area	1234	06/05/2017	06/05/2022	Sales Depart.	60	Months	Monthly	2	
CO0000082	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2024	Sales Depart.	60	Months	Monthly	7	
CO0000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart.	60	Months	Monthly	4	
CO0000083	WES001	Westwood Dynamic	CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart.	60	Months	Monthly	8	

The **Closure Comments** dialogue screen will open.

- Type in the **reason** for closing the contract.
- Click on **Save**

Closure Comments

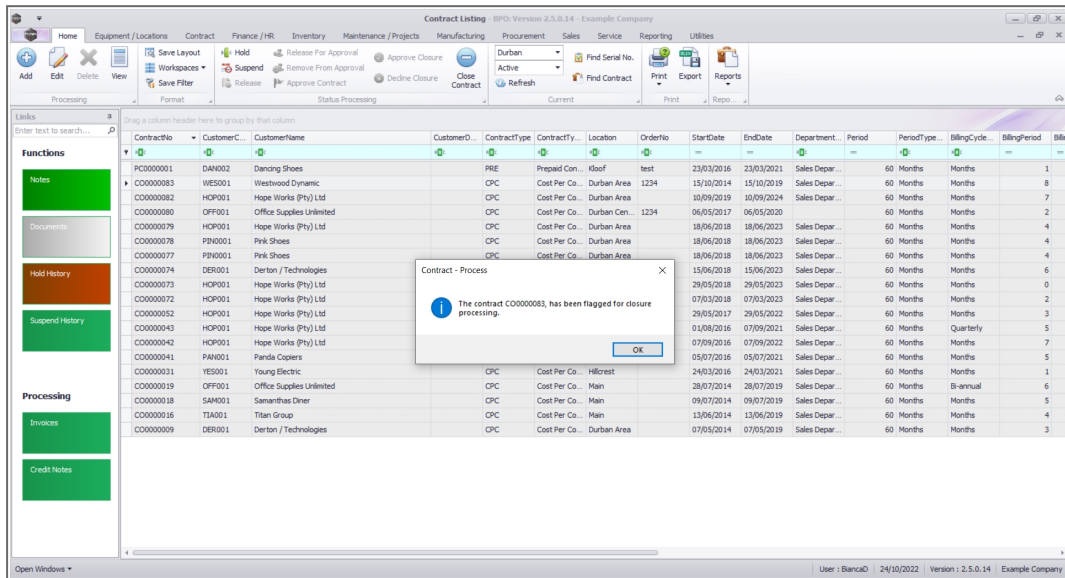
Home Save Back

Contract has come to the end of its term. This contract will not be extended. Client will be signing a new contract.

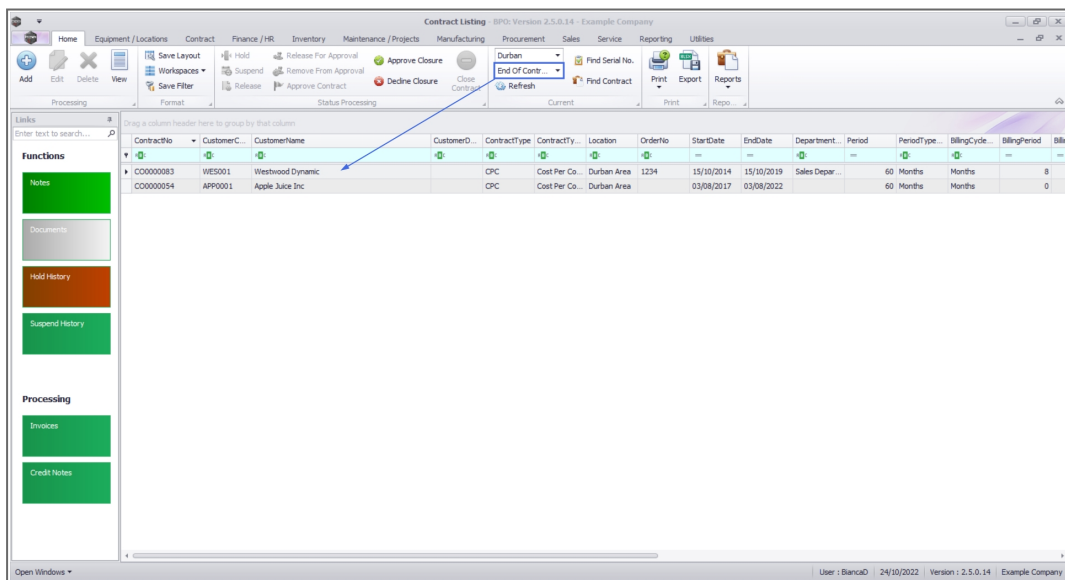
A **Contract - Process** message box will display, informing you that:

The contract [contract number, has been flagged for closure processing.

- Click on **Ok**.



- The contract status will be set to **End of Contract** and can be found via the End of Contract status filter on the Contract Listing screen.



Refer to "Approve Contract Closure" on page 4 to complete the closure process.

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