

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

# CONTRACT

## CONTRACTS – ADD (PRE V2.3.0.0)

In BPO2 you can create either a **service** contract or a **rental** contract.

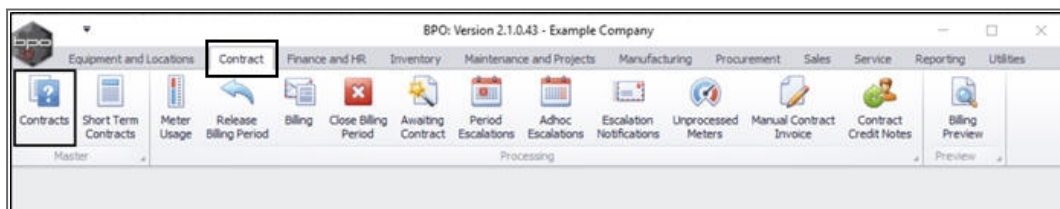
**Service Contract:** Machine sold to customer outright or via a finance house.

- A **New Deal Sale** must be completed in order to create this contract.

**Rental Contract:** In-house rental (machine owned by company).

- **New Deal Rental** must be completed in order to create this contract.

**Ribbon Access:** Contract > Contracts



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

- Select the **Site** that you wish to work in.
  - In this image **Durban** has been selected.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

Save Layout Hold Release For Approval Suspend Remove From Approval Close Contract

Workspaces Save Filter Release Approve Contract

Processing Format Status Processing

Durban

ID Name

0 All Sites

1 Durban

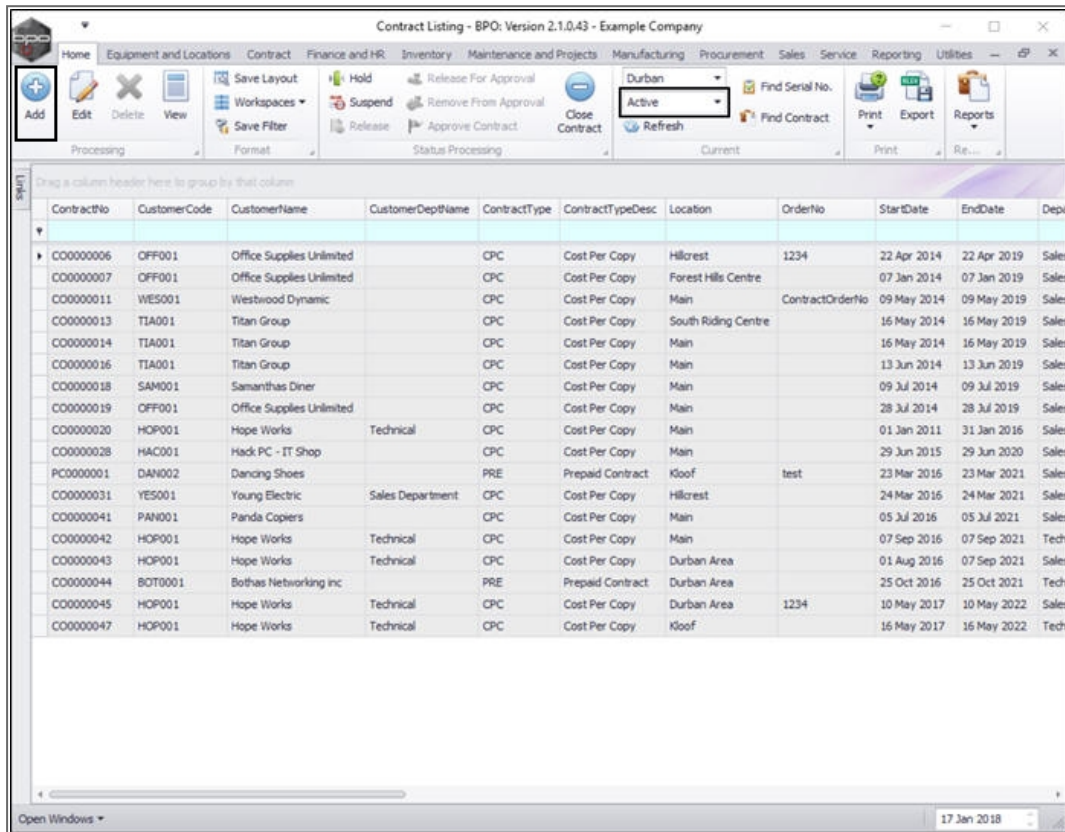
2 Pretoria

ContractNo CustomerCode CustomerName CustomerDeptName ContractType ContractTy StartDate EndDate Depa

CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	Sales
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main		09 Jul 2014	09 Jul 2019	Sales
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Koof	test	23 Mar 2016	23 Mar 2021	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	Tech
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO0000044	BOT0001	Botmas Networking inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Tech
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Koof		16 May 2017	16 May 2022	Tech

Open Windows 17 Jan 2018

- By default, this screen will list all the **Active** contracts for the selected site.
- You do not need to change this status to create/add a new contract.
- Click on **Add**.



ContractNo	CustomerCode	CustomerName	CustomerDepName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Dept
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	Sales
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main		09 Jul 2014	09 Jul 2019	Sales
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	Tech
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO0000044	BOT0001	Bothas Networking inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Tech
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	Tech

- The **Add a new Contract** screen will be displayed.

## CUSTOMER INFO PANEL

- Click on the **Customer Info** tab.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress

Customer Info

Contract Info

Billing Info

Links

Open Windows

17 Jan 2018

The **Customer Info** panel will expand.

- **Note: Dock** this panel to make it easier to work in.
- **Customer:** Click on the search button and select the customer from the **Select a customer for this contract** pop up screen.
- **Address:** Click on the search button and select the address from the **Select an address for this contract** pop up screen.
- **Order No:** Type in the customer order number if required.
- **Required:** Only select this check box if the client must supply an order number before a technician is sent to site.
- **Location:** Click on the drop-down arrow and select the contract location from the menu.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Customer Info

Customer

Address

Order No

Required ☐

Location

PartCode Description CategoryDesc ModelNo SerialNo AssetRegNo Location


Customer Info Contract Info Billing Info

Open Windows 17 Jan 2018

## CONTRACT INFO PANEL

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- When you have finished editing the customer info details, click on the **Contract Info** tab.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

**Customer Info**

Customer Hope Works

Address Plot 91 Leaf Road  
Forest Hills  
New Town  
Durban South  
1234

Order No New Deal Sale 100

Required ☒

Location Durban Area

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location

Customer Info Contract Info Billing Info

Open Windows 17 Jan 2018

The **Contract Info** panel will expand.



- **Contract No:** The contract number is generated by the system (where configured in the Contract Type set up).
- **Contract Type:** Click on the drop-down arrow and select the Contract Type e.g., Prepaid Contract.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- **End Date:** This will auto populate 5 years from the start date but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
- **Period:** Either type in or use the arrow indicators to select the period of the contract (life span of the contract).
- **Period Type:** Select the period type (measure relating to the lifespan), e.g., 60 months.
- **Department:** Click on the drop-down arrow and select the department.
- **Contract Manager:** Click on the drop-down arrow and select the contract manager.
- **Salesman:** Click on the drop-down arrow and select the salesman.
- **Aggregate Billing:** Click on this check box if the customer will receive aggregate billing.
- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.
  - **Note:** If this is an evergreen contract, set your end date to 31/12/2999

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## BILLING INFO PANEL

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- When you have finished editing the contract info details, click on the **Billing Info** tab.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

**Contract Info**

Contract No

Contract Type Cost Per Copy

Start Date 01 Jan 2018

End Date 31 Dec 2023

Period 60

Period Type Months

Department Sales Department

Contract Manager Jeff Rivers

Salesman Ben Johnson

Aggregate Billing ☐

Hide Fee Detail ☐

Customer Info Contract Info **Billing Info**

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PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location

The **Billing Info** panel will be expanded.

- **Note:** Some of these details will auto populate but they can be changed as explained below.
- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- **Billing Period:** This is the financial period in which billing will first begin. Type in or use the arrow indicators to select the period number (e.g., January = 11).
- **Billing Day:** Type in the day that the customer will be billed (e.g., on the 25th of each billing cycle).

## NOTE ON BILLING DAY

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- The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the **Contract Billing** screen. The Billing Day is limited to 31. You can type in the day that the customer will be billed (e.g., on the 25th of each billing cycle) else leave as 0.
- **Escalation Type:** Search for and Select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g., 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
  - **Note:** If this escalates on the anniversary of the contract, then use the same financial period as the billing period
- **Currency:** The system will auto populate with the currency already set up on the customer but you can click on the drop-down arrow and select an alternative currency if required.

- **Note:** For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g., type in the Dollar amount if the currency is USD.
- **Exchange:** Type in the exchange rate.
- **Tax Rate:** Type in the tax rate.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

**Billing Info**

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Locat

Customer Info Contract Info Billing Info

Open Windows 22 Jan 2018

**Billing Info**

Billing Cycle

Billing Period

Billing Day

Escalation Type

Escalation Period

Escalation Amt

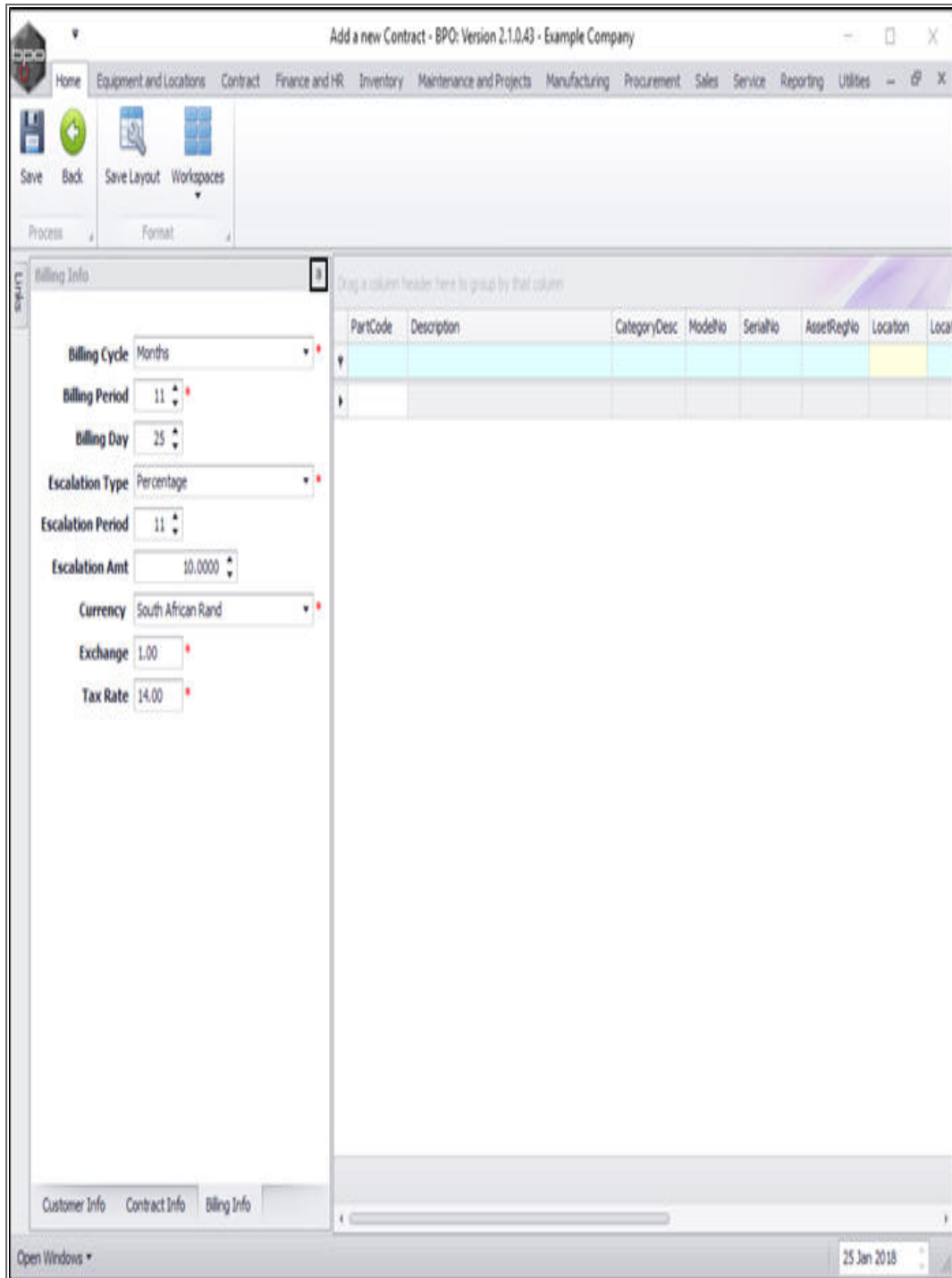
Currency

Exchange

Tax Rate

- When you have finished editing the Billing Info panel, you can **hide (dock)** the panel to make it easier to work in the **Items** frame.
- Click on the **docking icon** in the billing panel.

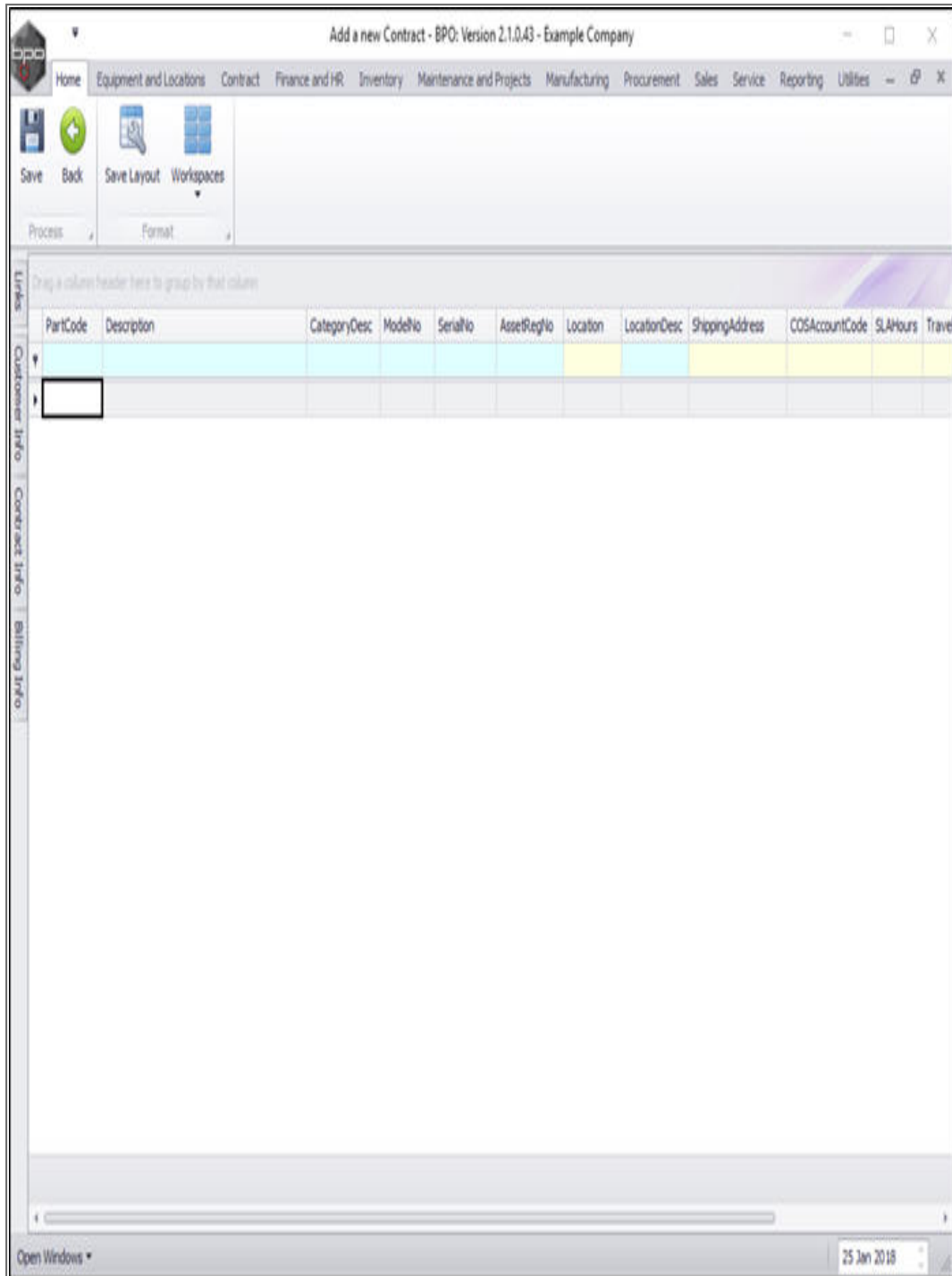




- The **Customer Info**, **Contract Info** and **Billing Info** panels will now be reduced to **tabs** at the side of the screen.

## CONTRACT PARTS FRAME

- **Right click** anywhere in the **row** of the **Parts** frame.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COSAccountCode	SLAHours	Travel

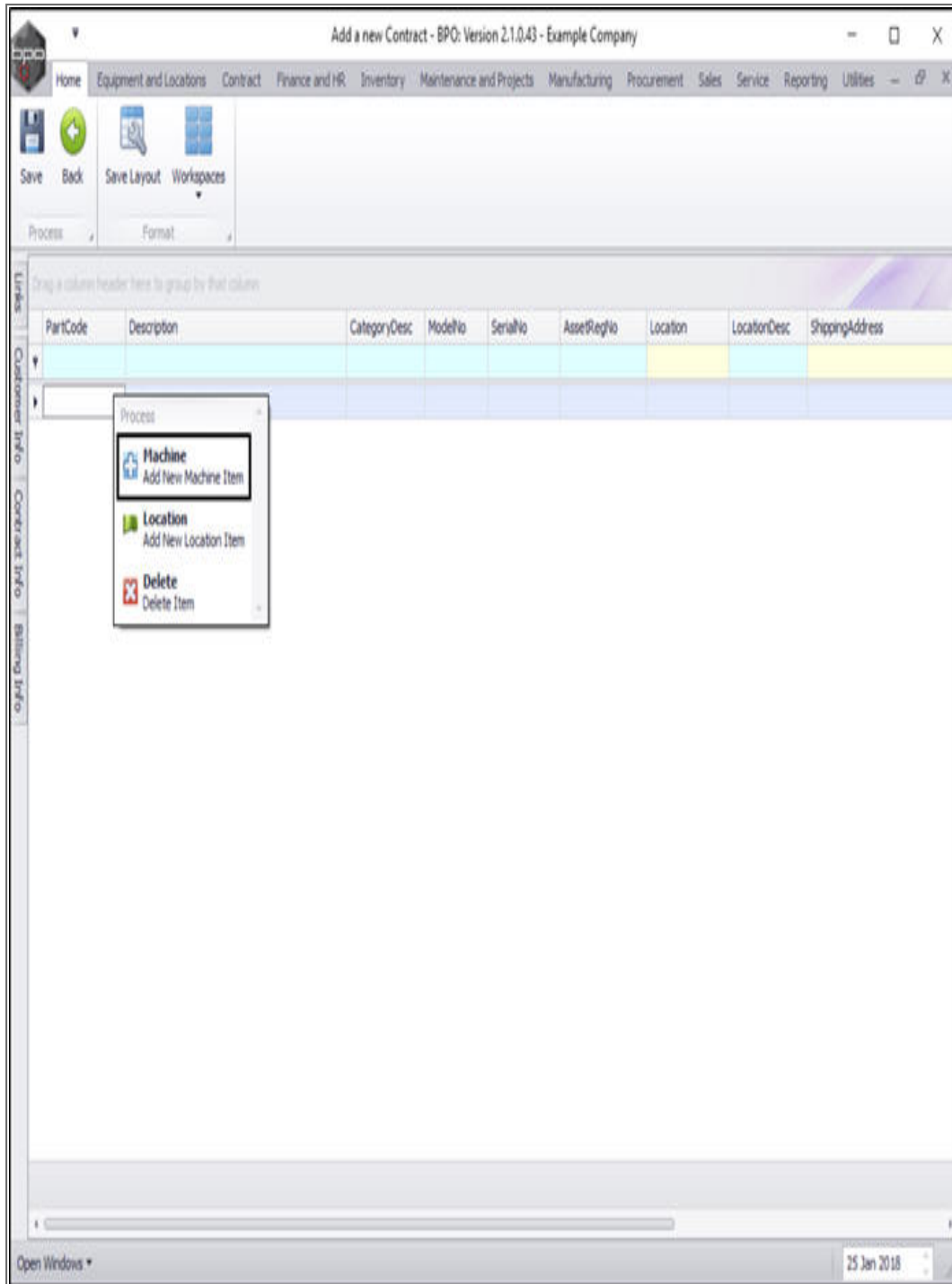
Open Windows 25 Jan 2018

- A **Process** menu will pop up.

## **ADD MACHINE ITEM**

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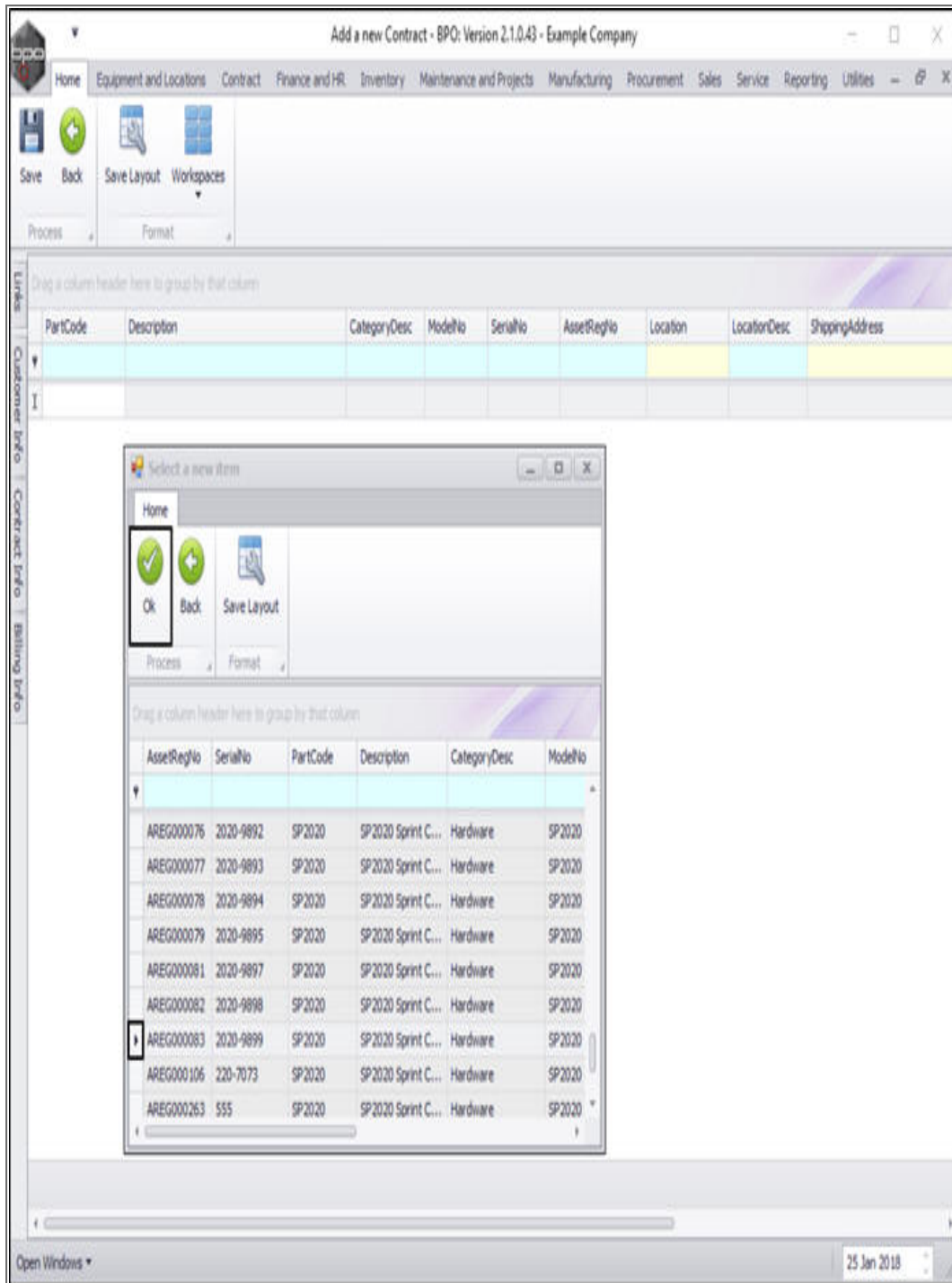
- Click on **Machine** - Add New Machine Item.



- The **Select a new item** pop up screen will appear.
- Click on the **row selector** in front of the **machine** that you wish to

link to this **contract**.

- Click on **Ok**.



- The following columns will auto populate according to your item selection:
  - **Part Code**
  - **Description**
  - **Category Description**
  - **Model No**
  - **Serial No**
  - **Asset Register No**

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## LINK LOCATION

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- Click in the **Location** text box.
- Type in a **location** for this item.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083			

Customer Info Contract Info Billing Info

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## LINK SHIPPING ADDRESS

- Click in the **Shipping Address** text box.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

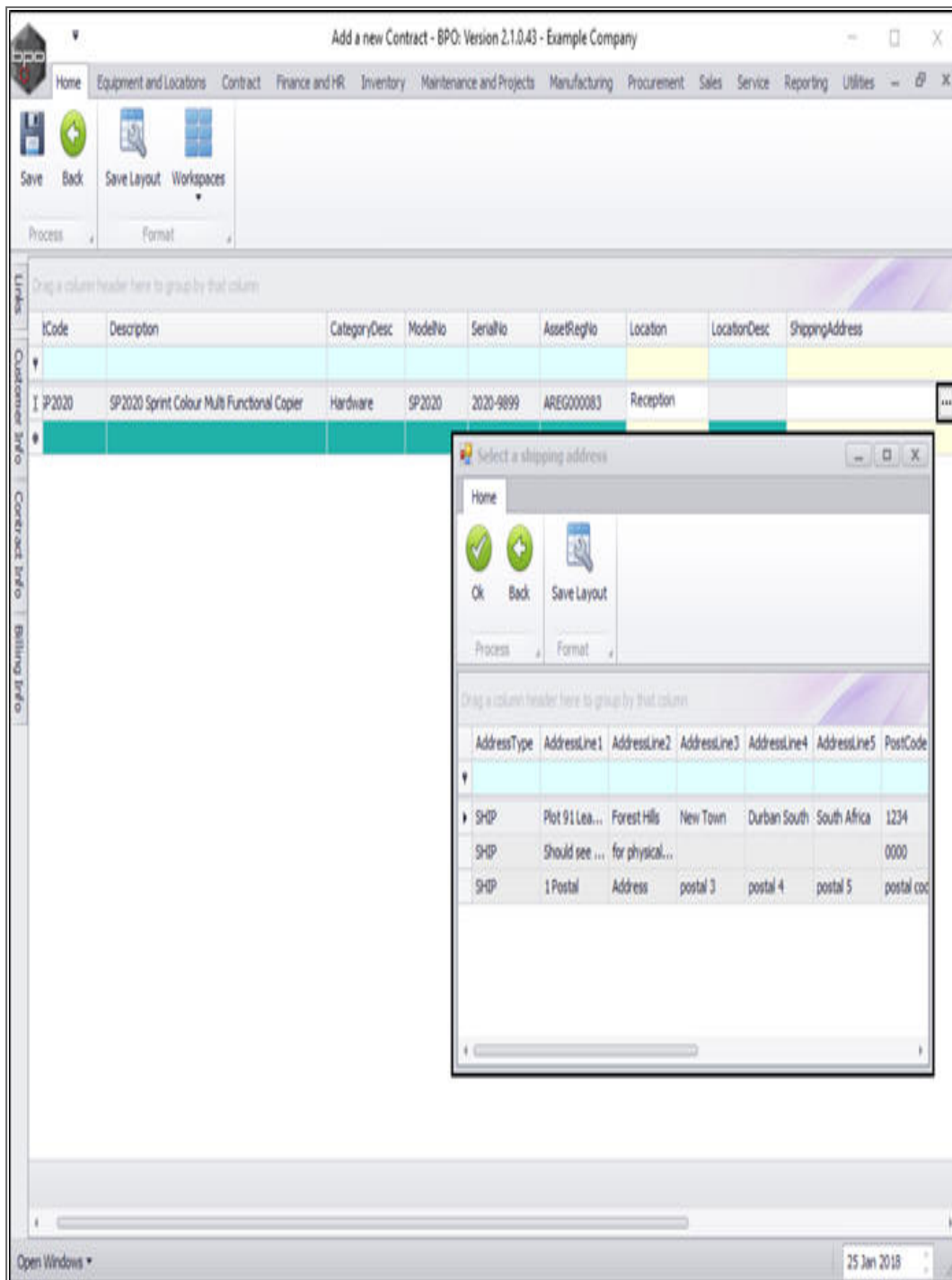
Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9999	AREG000083	Reception		

Customer Info Contract Info Billing Info

Open Windows 25 Jan 2018

- An **ellipsis** button will be revealed.
- Click on this button to display the **Select a shipping address** pop up screen.



- Click on the **row selector** in front of the **shipping address** that you wish to **link** to this **item**.
- Click on **Ok**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

Item	ItemCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
1	IP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		

Customer Info Contract Info Billing Info

Select a shipping address

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

AddressType	AddressLine1	AddressLine2	AddressLine3	AddressLine4	AddressLine5	PostCode
SHIP	Plot 91 Lea...	Forest Hills	New Town	Durban South	South Africa	1234
SHIP	Should see ...	for physical...				0000
SHIP	1 Postal	Address	postal 3	postal 4	postal 5	postal cod

Open Windows

25 Jan 2018

- **Scroll right** to view the remaining columns in the Items frame.

## LINK COS ACCOUNT CODE

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- Click in the **COS Account Code** text box.
- Type in the **Cost of Sales account code** to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).

Open Windows ▾

## LINK SLA HOURS

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- Click in the **SLA Hours** text box.
- Type in or use the arrow indicators to select the required call response time (in hours).

Open Windows •



## LINK TRAVEL RADIUS

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- Click in the **Travel Radius** text box.
- Type in or use the arrow indicators to select the distance in km's to and from the client, if this travel is to be billed every time a call is logged. If travel is included, then set this to **0**.
  - **Note:** Travel can always be billed separately, if required.

Open Windows •

## LINK TRAVEL CHARGE

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- Click in the **Travel Charge Rate** text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g., Rand per kilometre).

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
SP2020	2020-9899	ARIEG000083	Reception		Plot 91 Leaf Road, Forest Hills, ...	2101	8.00	42	0.00	No	A

Customer Info Contract Info Billing Info

Open Windows 25 Jan 2018

- The **Is Extra** and **Status** fields are static.
- **Scroll left**, so that you can view the **Part Code** column again.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
I	SP2020	2020-9899	AREG0000083	Reception		Plot 91 Leaf Road, Forest Hills, ...	2101	8.00	42	2.10	No	A

Customer Info Contract Info Billing Info

Open Windows 25 Jan 2018

## ITEMS FRAME

- Click on the **expand** button in the **Part Code** text box.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...

Customer Info Contract Info Billing Info

Open Windows 25 Jan 2018

- The selected machine's **Item** frame will be expanded.
- Here you can click on 4 different tabs to add or edit:

- **Item Fees:** monthly charges
- **Item Meters:** meter usage charges
- **Item Inclusions:** items not to bill
- **Item Contacts:** the contact person - per machine.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9999	AREG0000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2101

Item Fees		Item Meters		Item Inclusions		Item Contacts							
Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	EscalationPeriod
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	L	Loan	0.00	1200			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	R	Bank Rental	0.00	1204			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	S	Service	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	N	Insurance	0.00	1203			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	REN	Standard Rentals	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	W	Renew Fee	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
			0.00										

Open Windows 25 Jan 2018

## ITEM FEES FRAME

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The **Item Fees** frame displays **Contract Item Fees** that have been set up.

### Add Item Fee

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- **Marked:** Click on the check box in this column in front of the **Fee Type** and **Fee Description** to be charged
  - In this image **N Insurance** has been selected as an example.
- **Charge Amount:** Type in or use the arrow indicators to select the fee amount.
- **Account Code:** This will auto populate with the account code linked to this fee item.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.
- **Invoice Description:** Type in the description to be used for this fee on the invoice.
- **Start Date and End Date:** These will auto populate according to the contract start date and end date selected in the Contract Info panel. You can click on the drop-down arrow and use the calendar function to select an alternative start and end date if required.
  - **Note:** Take note that the contract fee will only bill from the start date, and will stop billing at the end date.
- **Period & Period Type:** These fields will auto populate according to the contract start and end date recorded in the Contract Info panel. You can click on the text boxes and either type in or use the drop-down arrows to select an alternative period and period type if required.



- **Billing Cycle:** This will auto populate according to the contract billing cycle recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing cycle if required.
- **Billing Period:** This will auto populate according to the contract billing period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing period if required.
- **Escalation Period:** This will auto populate according to the escalation period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative escalation period if required.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2103

Item Fees Item Meters Item Inclusions Item Contacts

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	EscalationPeriod
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	L	Loan	0.00	1200			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	R	Bank Rental	0.00	1204			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	S	Service	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input checked="" type="checkbox"/>	N	Insurance	350.00	1203	2101	Insurance Fee	01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	REN	Standard Rentals	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	W	Renew Fee	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
			0.00										

Open Windows 25 Jan 2018

**Scroll right** to view the remaining columns in this frame.

- **Escalation Type:** This will auto populate according to the escalation type recorded in the Billing Info panel. You can click on the

drop-down arrow in the text box to select an alternative escalation type if required.

- **Escalation Amount:** This will auto populate according to the escalation amount recorded in the Billing Info panel. You can click on the text box and either type in or use the arrow indicators to select an alternative escalation amount if required.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2103

Item Fees Item Meters Item Inclusions Item Contacts

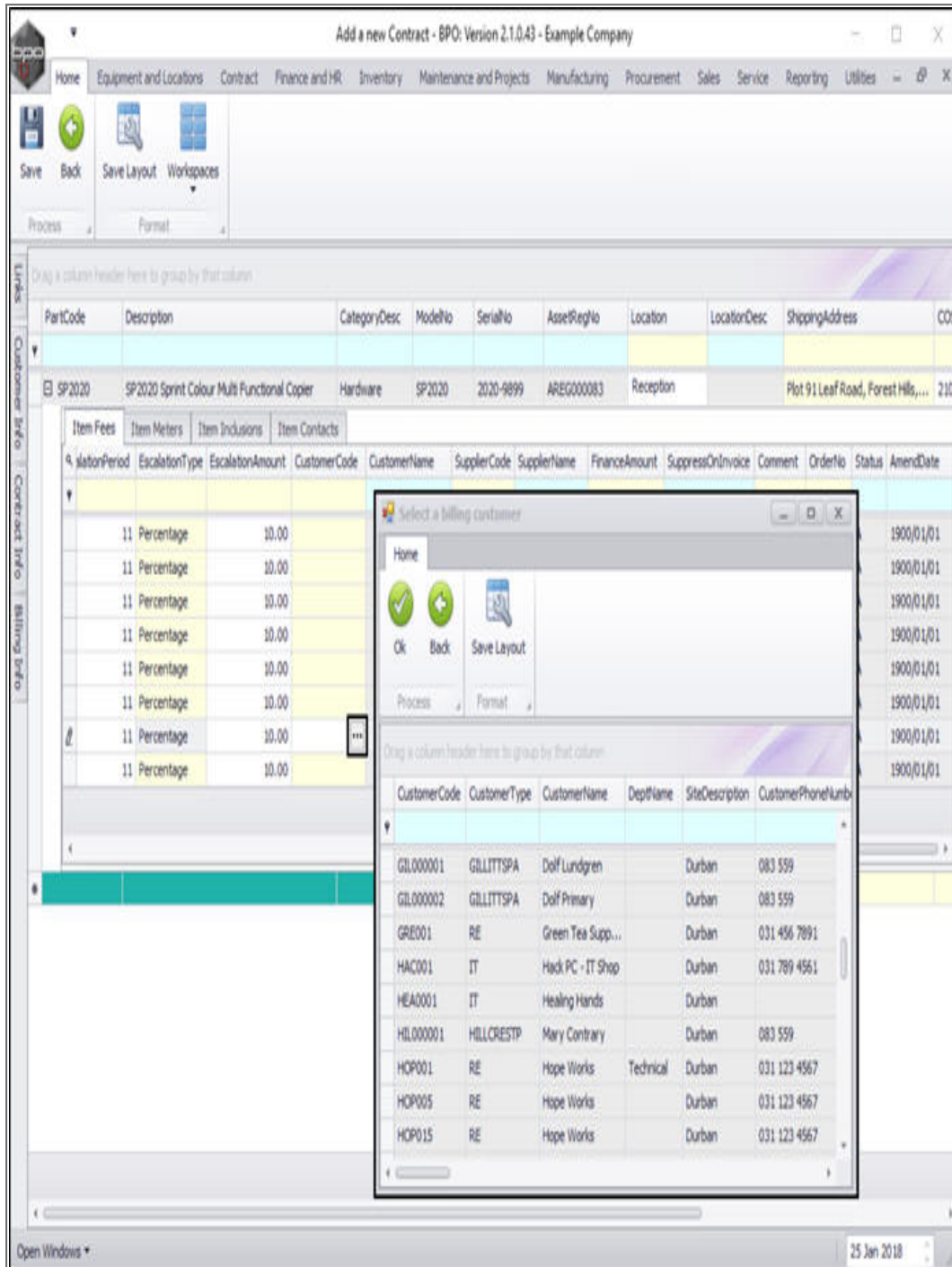
EscalationPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
I 11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01

Open Windows 25 Jan 2018

- **Customer Code:**
  - Click in the **Customer Code** text box.

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- **Customer Code:**
  - An **ellipsis** button will be revealed.
  - Click on this button to display the **Select a billing customer** pop up screen.



The screenshot shows the 'Add a new Contract' window with the following data:

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2103

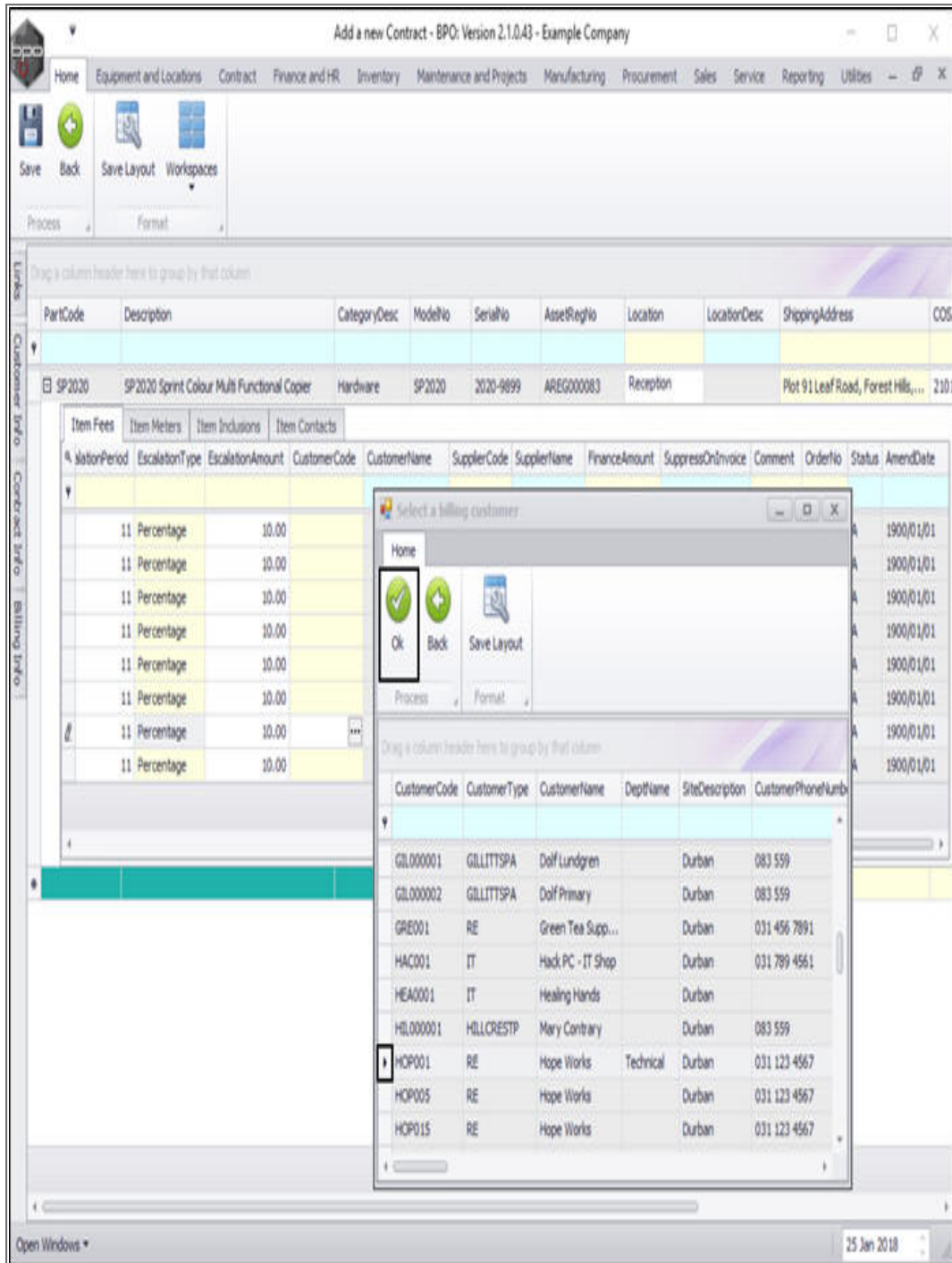
Item Fees	Item Meters	Item Inclusions	Item Contacts
EscalationPeriod	EscalationType	EscalationAmount	CustomerCode
11	Percentage	10.00	
11	Percentage	10.00	
11	Percentage	10.00	
11	Percentage	10.00	
11	Percentage	10.00	
11	Percentage	10.00	
11	Percentage	10.00	
11	Percentage	10.00	

The 'Select a billing customer' pop-up window displays the following data:

CustomerCode	CustomerType	CustomerName	DeptName	SiteDescription	CustomerPhoneNum
GIL000001	GILLITSPA	Dolf Lundgren		Durban	083 559
GIL000002	GILLITSPA	Dolf Primary		Durban	083 559
GRE001	RE	Green Tea Supp...		Durban	031 456 7891
HAC001	IT	Hack PC - IT Shop		Durban	031 789 4561
HEA0001	IT	Healing Hands		Durban	
HIL000001	HILLCRESTP	Mary Contrary		Durban	083 559
HOP001	RE	Hope Works	Technical	Durban	031 123 4567
HOP005	RE	Hope Works		Durban	031 123 4567
HOP015	RE	Hope Works		Durban	031 123 4567

- **Customer Code:**
  - Select the **row** of the **Billing Customer** to whom you wish to **link** this **contract**.
  - Click on **Ok**.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2102

Item Fees Item Meters Item Inclusions Item Contacts

StationPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01
11	Percentage	10.00										1900/01/01

Select a billing customer

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

CustomerCode	CustomerType	CustomerName	DeptName	SiteDescription	CustomerPhoneNum
GIL000001	GILLITSPA	Dolf Lundgren	Durban	083 559	
GIL000002	GILLITSPA	Dolf Primary	Durban	083 559	
GRE001	RE	Green Tea Supp...	Durban	031 456 7891	
HAC001	IT	Hack PC - IT Shop	Durban	031 789 4561	
HEA0001	IT	Healing Hands	Durban		
HIL000001	HILLCRESTP	Mary Contrary	Durban	083 559	
HOP001	RE	Hope Works	Technical	Durban	031 123 4567
HOP005	RE	Hope Works	Durban	031 123 4567	
HOP015	RE	Hope Works	Durban	031 123 4567	

Open Windows 25 Jan 2018



- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.
  - **Note:** If the customer details are left blank, the system will bill the main customer linked to the contract.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2103

Item Fees Item Meters Item Inclusions Item Contacts

EscalationPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00	HOP001	Hope Works			0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01

Open Windows 25 Jan 2018

- **Supplier Code / Supplier Name / Finance Amount**
  - Follow the next 5 screen shots only if you wish to link

a supplier for rental back-to-backs (finance house bills company & company bills client).

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2102

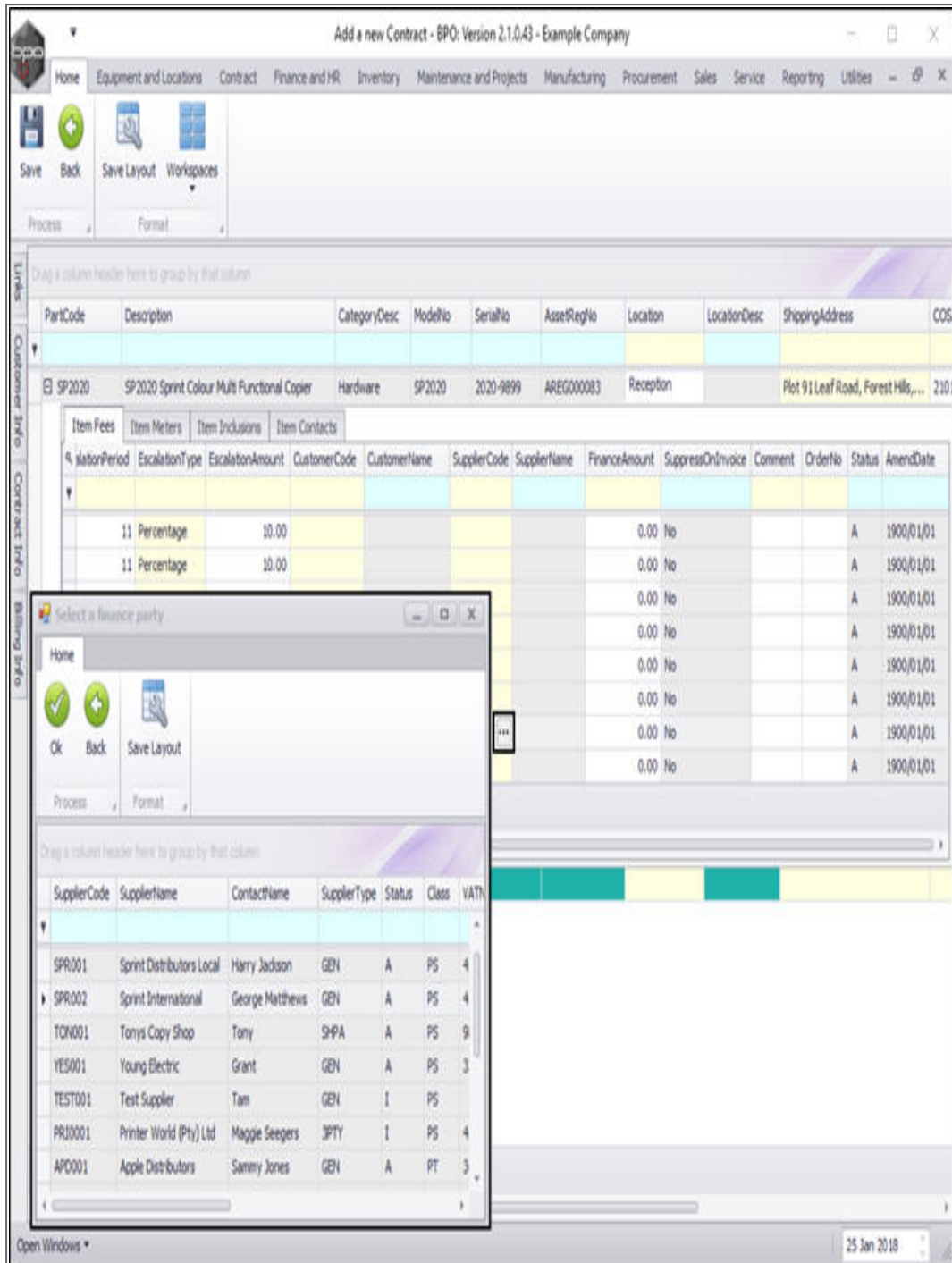
Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts									
EscalationPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00	HOP001	Hope Works			0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01

Open Windows 25 Jan 2018

- **Supplier Code:**

- Click on the **Supplier Code** text box to reveal an **ellipsis** button.
- Click on this button to display the **Select a finance party** pop up screen



The screenshot displays the 'Add a new Contract' window in the BPO software. The main window has a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with Save, Back, Save Layout, and Workspaces buttons. The main area contains a table with columns: PartCode, Description, CategoryDesc, ModelNo, SerialNo, AssetRegNo, Location, LocationDesc, ShippingAddress, and COS. A row is selected with the following data: SP2020, SP2020 Sprint Colour Multi Functional Copier, Hardware, SP2020, 2020-9899, AREG000083, Reception, Plot 91 Leaf Road, Forest Hills, 2103.

A pop-up window titled 'Select a finance party' is overlaid on the main window. It has a similar toolbar with Ok, Back, and Save Layout buttons. The pop-up window contains a table with columns: SupplierCode, SupplierName, ContactName, SupplierType, Status, Class, and VAT. The table lists several suppliers, including Sprint Distributors Local, Sprint International, Tony's Copy Shop, Young Electric, Test Supplier, Printer World (Pty) Ltd, and Apple Distributors.

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VAT
SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	PS	4
SPR002	Sprint International	George Matthews	GEN	A	PS	4
TON001	Tony's Copy Shop	Tony	SHFA	A	PS	9
YES001	Young Electric	Grant	GEN	A	PS	3
TEST001	Test Supplier	Tam	GEN	I	PS	
PR10001	Printer World (Pty) Ltd	Maggie Seegers	3PTY	I	PS	4
APD001	Apple Distributors	Sammy Jones	GEN	A	PT	3

- **Supplier Code:**
  - Select the **row** of the **Supplier** that you wish to **link** to this **item**.
  - Click on **Ok**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2103

Item Fees Item Meters Item Inclusions Item Contacts

EscalationPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
							0.00	No			A	1900/01/01
							0.00	No			A	1900/01/01
							0.00	No			A	1900/01/01
							0.00	No			A	1900/01/01
							0.00	No			A	1900/01/01
							0.00	No			A	1900/01/01

Select a finance party

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VATNo
SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	PS	4
SPR002	Sprint International	George Matthews	GEN	A	PS	4
TON001	Tony's Copy Shop	Tony	SHPA	A	PS	9
YES001	Young Electric	Grant	GEN	A	PS	3
TEST001	Test Supplier	Tam	GEN	I	PS	
PRJ001	Printer World (Pty) Ltd	Magge Seegers	3PTY	I	PS	4
APD001	Apple Distributors	Sammy Jones	GEN	A	PT	3

Open Windows

25 Jan 2018

- **Supplier Name:** This will auto populate once the supplier code has been selected.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2102

Item Fees Item Meters Item Inclusions Item Contacts

ItemPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
I 11	Percentage	10.00	HOP001	Hope Works	SPR002	Sprint International	0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01

Open Windows 25 Jan 2018

- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills, ...	2103

Item Fees	Item Meters	Item Inclusions	Item Contacts	Item Period	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
	11	Percentage				10.00					0.00	No			A	1900/01/01
	11	Percentage				10.00					0.00	No			A	1900/01/01
	11	Percentage				10.00					0.00	No			A	1900/01/01
	11	Percentage				10.00					0.00	No			A	1900/01/01
	11	Percentage				10.00					0.00	No			A	1900/01/01
	11	Percentage				10.00					0.00	No			A	1900/01/01
	11	Percentage				10.00	HOP001	Hope Works	SPR002	Sprint International	0.00	No			A	1900/01/01
	11	Percentage				10.00					0.00	No			A	1900/01/01

Open Windows

25 Jan 2018

- **Suppress on Invoice:** Select this if you wish to hide the fee on the invoice.

- **Comment:** Click in this text box and type in a comment regarding this contract fee, if required.
- **Order No:** Type in a customer order number relevant to this item, if required.
- **Status:** This field will change from **I** (Inactive) to **A** (Active) when you have saved the assigned item fee.
- **Amend Date:** This field is static.

The 'Add an Item Fee' process is now complete.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills, ...	210

Item Fees Item Meters Item Inclusions Item Contacts

ItemPeriod	EscalationType	EscalationAmount	CustomerCode	CustomerName	SupplierCode	SupplierName	FinanceAmount	SuppressOnInvoice	Comment	OrderNo	Status	AmendDate
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01
I	Percentage	10.00	HOP001	Hope Works	SPR002	Sprint International	3 500.00	No			A	1900/01/01
11	Percentage	10.00					0.00	No			A	1900/01/01

Open Windows 25 Jan 2018

## Link Additional Item Fees

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- **Scroll back** to the **Marked** column.
- You can now set up **additional fees** for this machine by following the above process, if required, before moving on to the next frame.

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## ITEM METERS FRAME

- When you have finished working in the Item Fees frame, click on the **Item Meters** tab.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress	COS
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Forest Hills,...	2102

Item Fees Item Meters Item Inclusions Item Contacts

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	EscalationPeriod
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	L	Loan	0.00	1200			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	R	Bank Rental	0.00	1204			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	S	Service	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input checked="" type="checkbox"/>	N	Insurance	350.00	1203	2101	Insurance Fee	01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	REN	Standard Rentals	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
<input type="checkbox"/>	W	Renew Fee	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	11	11
			350.00										

Open Windows 25 Jan 2018

- The Item Meters frame displays all linked meters, minimum billing and meter usage charges.

[Read this Important Note on Min Billing and Meter Charge Setup](#)

- If you are not going to bill meters - then this is fine. If you are - complete the contract set up (you can link the meters afterwards) then follow these 2 steps:
  - 1. [Assign the meter to the machine](#)
  - 2. [Add the meter charges to the contract](#)

Open Windows ▾

- **Marked:** Click on the check box in front of the name of the first Meter to be billed on this contract.
  - In this image the **Mono** meter has been selected as an example.
- **Start Reading:** Type in the start reading of the meter.
- **Reading Date:** Click in this text box to display the calendar function, use this to select the reading date.
- **Min Billing:** Type in the minimum billing amount (in Rand value).
- **Min Quantity:** Type in the minimum quantity (the copies that are included in the minimum billing amount).
- **Account Code:** Type in the sales account code for these meter charges to post to.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.

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- **Escalation Period, Escalation Type and Escalation Amount:** These will pull through from the main contract details but you can click in the text boxes and amend the details if required.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts								
Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100	11	Percentage	10.00	
<input type="checkbox"/>	Colour	0.00	01 Jan 1900	0.00	0			11	Percentage	10.00	
<input type="checkbox"/>									[Edit value is null]		

Open Windows

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- **Scroll right** until you can view the remaining columns in this frame.
- **Supplier Code, Supplier Name and Finance Amount:**  
Follow the next 5 screenshots only if you wish to link a supplier here - if a party other than the main customer will be paying for the meter charges (e.g., this company's head office).

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts							
AccountCode	COSAAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode	SupplierName	FinanceAmount	OrderNo	IsActive	AmendDate
2101	1100	11	Percentage	10.00			0.00		Yes	1900/01/01
		11	Percentage	10.00			0.00		No	1900/01/01
			[EditValue is null]							

Open Windows

25 Jan 2018

- **Supplier Code:**
  - Click on the **Supplier Code** text box to reveal an **ellipsis** button.
  - Click on this button to display the **Select a finance party** pop up screen.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees Item Meters Item Inclusions Item Contacts

AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode	SupplierName	FinanceAmount	OrderNo	IsActive	AmendDate
2101	1100	11	Percentage	10.00			0.00		Yes	1900/01/01
							0.00		No	1900/01/01

Select a finance party

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VATNo
SUP001	Buy Back Supplier	Supplier Cont...	BUY	A	SE	00000
SPR001	Sprint Distributor...	Harry Jackson	GEN	A	PS	45678
SPR002	Sprint International	George Matt...	GEN	A	PS	45625
TON001	Tonys Copy Shop	Tony	SHPA	A	PS	98745
YES001	Young Electric	Grant	GEN	A	PS	32450
TEST001	Test Supplier	Tam	GEN	I	PS	
PR10001	Printer World (Pt...	Maggie Seegers	3PTY	I	PS	45612

Open Windows

25 Jan 2018

- **Supplier Code:**
  - Click on the **row selector** in front of the **Supplier** that you wish to **link** to this **item meter**.
  - Click on **Ok**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
AccountCode	COSAccountCode	EscalationPeriod	EscalationType
2101	1100	11 Percentage	10.00

Select a finance party

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

SupplierCode	SupplierName	ContactName	SupplierType	Status	Class	VATNo
SUP001	Buy Back Supplier	Supplier Cont...	BUY	A	SE	00000
SPR001	Sprint Distributor...	Harry Jackson	GEN	A	PS	45678
SPR002	Sprint International	George Matt...	GEN	A	PS	45625
TON001	Tonys Copy Shop	Tony	SHPA	A	PS	98745
YES001	Young Electric	Grant	GEN	A	PS	32450
TEST001	Test Supplier	Tam	GEN	I	PS	
PRJ001	Printer World (Pt...	Maggie Seegers	3PTY	I	PS	45612

Open Windows

25 Jan 2018



- **Supplier Name:** This will auto populate once the supplier code has been selected.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts							
AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode	SupplierName	FinanceAmount	OrderNo	IsActive	AmendDate
2101	1100	11	Percentage	10.00	YES001	Young Electric	0.00		Yes	1900/01/01
		11	Percentage	10.00			0.00		No	1900/01/01
			[EditValue is null]							

Open Windows 25 Jan 2018

- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts							
AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode	SupplierName	FinanceAmount	OrderNo	IsActive	AmendDate
2101	1100	11	Percentage	10.00	YES001	Young Electric	0.00		Yes	1900/01/01
		11	Percentage	10.00			0.00		No	1900/01/01
			[EditValue is null]							

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25 Jan 2018

- **Order No:** Type in a customer order number relevant to this item, if required.
- **Is Active:** This field is set to **Yes** (Active) once you have clicked on the Marked checkbox.
- **Amend Date:** This field is static.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts							
AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	SupplierCode	SupplierName	FinanceAmount	OrderNo	IsActive	AmendDate
2101	1100	11	Percentage	10.00	YES001	Young Electric	2 500.00		Yes	1900/01/01
		11	Percentage	10.00			0.00		No	1900/01/01
		[Edit value is null]								

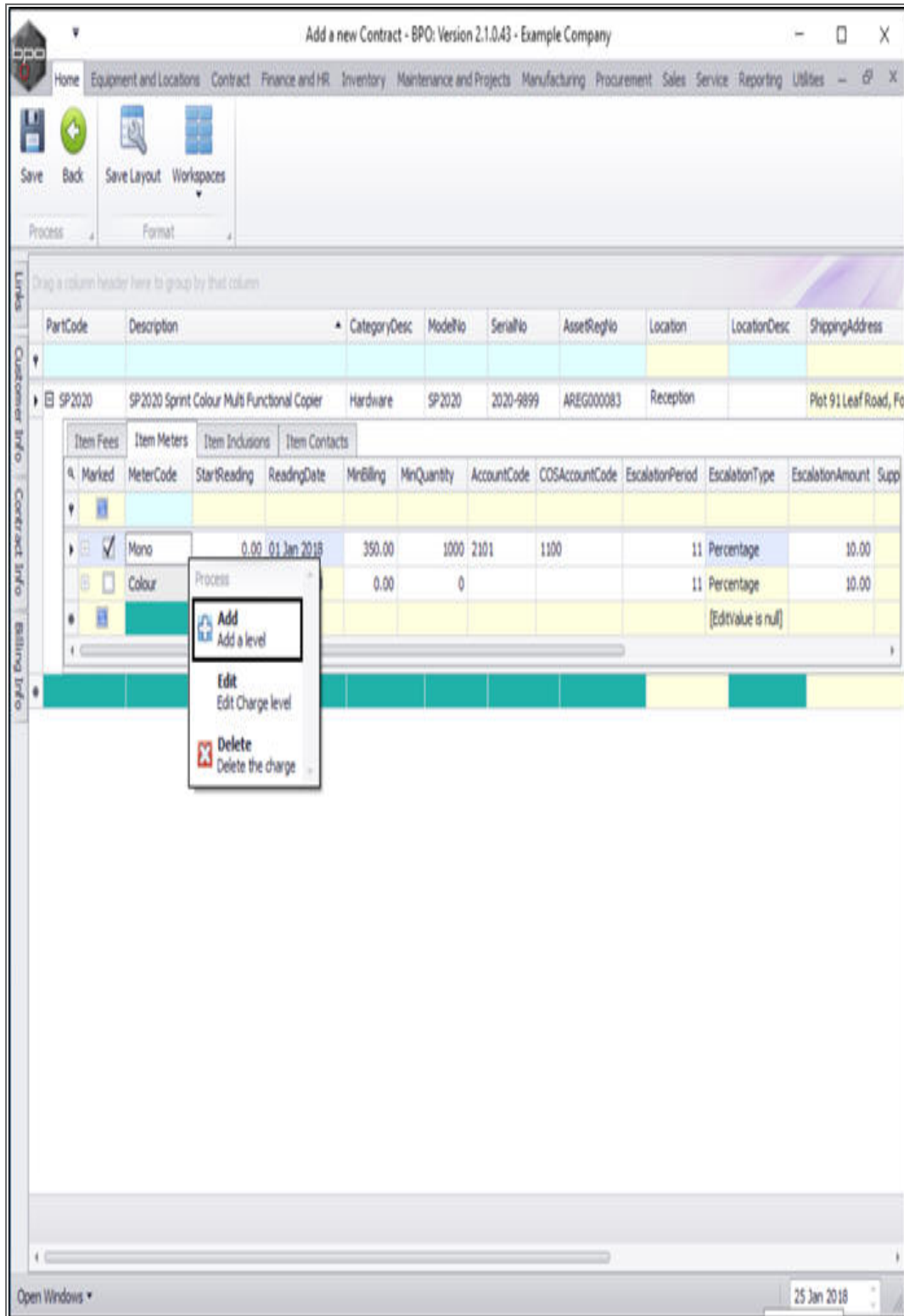
Open Windows 25 Jan 2018

## Add Meter Levels

---

[Read this Important Note on Min Billing and Meter Charge Setup](#)

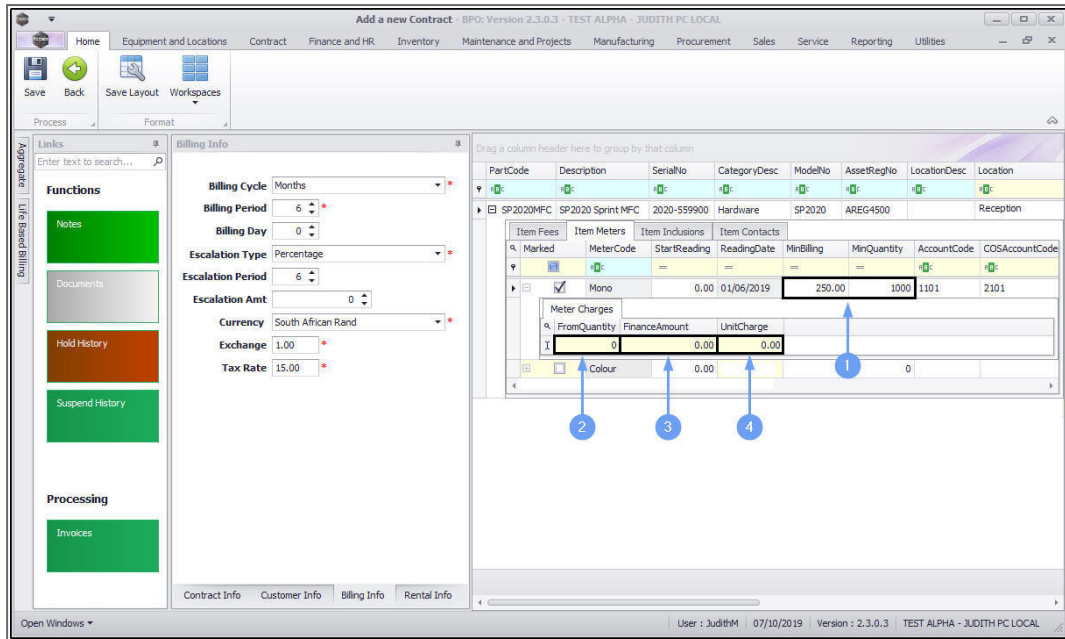
- **Scroll left** to return to the **Marked** column.
- **Right click** in the **row** of the **item** you wish to **add** a **meter level** to.
  - In this image the **Mono** meter has been selected.
- A **Process** menu will pop up.
- Click on **Add** - Add a level.



- The **Meter Charges** frame will be expanded.



- **Note:** For this mono meter, there is already a minimum billing set up of a R250 charge for the first 1000 copies. BPO calculates the usage charges by first calculating the minimum billing set up. This means the first line in the Meter Charges matrix looks incorrect as the From Quantity is static at 0 but it is actually reading from the minimum billing set up. In this example it will read the meter from 1001.
- **From Quantity:** This is the number from which this charge will be effective.
  - As the first (minimum billing level) is up to and including 1000, this level will start counting from 1001.
- **Finance Amount:** This will only be populated if back-to-back finance is used, and the finance house is financing part of the meter charge.
- **Unit Charge:** Type in the unit charge for the meter (charge per copy when Minimum Quantity is exceeded).



## Add Additional Charge Level

- **Right click** anywhere in the **row** of the **item** that you wish to add **another meter level** to. (You can keep the meter charges matrix open).
- The **Process** menu will pop up again.
- Click on **Add** - Add a level.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

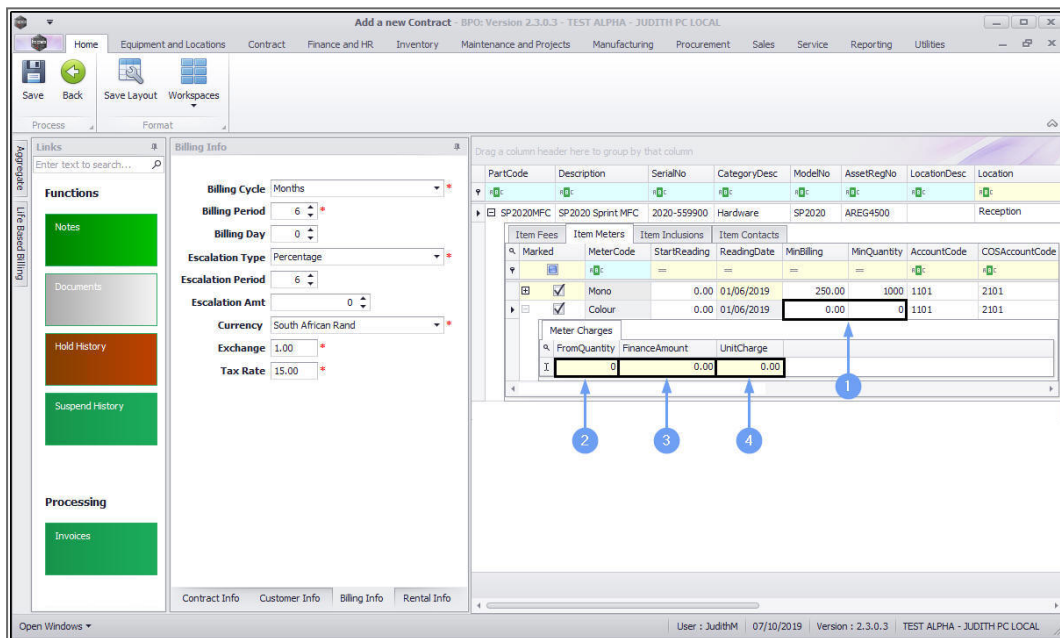
Item Fees	Item Meters	Item Inclusions	Item Contacts																														
<table border="1"> <thead> <tr> <th>Marked</th> <th>MeterCode</th> <th>StartReading</th> <th>ReadingDate</th> <th>MinBilling</th> <th>MinQuantity</th> <th>AccountCode</th> <th>COSAAccountCode</th> <th>EscalationPeriod</th> <th>EscalationType</th> <th>EscalationAmount</th> <th>Supp</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Mono</td> <td>0.00</td> <td>01 Jan 2018</td> <td>350.00</td> <td>1000</td> <td>2101</td> <td>1100</td> <td>11</td> <td>Percentage</td> <td>10.00</td> <td></td> </tr> </tbody> </table>	Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp	<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100	11	Percentage	10.00		<table border="1"> <thead> <tr> <th>FromQuantity</th> <th>FinanceAmount</th> <th>UnitCharge</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0.00</td> <td>30.00</td> </tr> </tbody> </table>	FromQuantity	FinanceAmount	UnitCharge	0	0.00	30.00		
Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp																						
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100	11	Percentage	10.00																							
FromQuantity	FinanceAmount	UnitCharge																															
0	0.00	30.00																															
<table border="1"> <thead> <tr> <th>Marked</th> <th>MeterCode</th> <th>StartReading</th> <th>ReadingDate</th> <th>MinBilling</th> <th>MinQuantity</th> <th>AccountCode</th> <th>COSAAccountCode</th> <th>EscalationPeriod</th> <th>EscalationType</th> <th>EscalationAmount</th> <th>Supp</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Colour</td> <td>0.00</td> <td>01 Jan 2018</td> <td>0.00</td> <td>0</td> <td></td> <td></td> <td>11</td> <td>Percentage</td> <td>10.00</td> <td></td> </tr> </tbody> </table>	Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp	<input checked="" type="checkbox"/>	Colour	0.00	01 Jan 2018	0.00	0			11	Percentage	10.00										
Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp																						
<input checked="" type="checkbox"/>	Colour	0.00	01 Jan 2018	0.00	0			11	Percentage	10.00																							

Process

- Add
- Add a level
- Edit
- Edit Charge level
- Delete
- Delete the charge

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- A **second level** has now been added to the Meter Charges matrix.
  - **From Quantity:** Type in or use the arrow indicators to select the number of copies from which this charge will be effective.
  - **Finance Amount:** This will only be populated if back-to-back finance is used, and the finance house is financing part of the meter charge.
  - **Unit Charge:** Type in the unit charge for the meter (charge per copy).
- Repeat this process to add more meter charges as required.



- When you have finished working in the Meter Charges frame, **close** the frame.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts																																				
<table border="1"> <thead> <tr> <th>Marked</th> <th>MeterCode</th> <th>StartReading</th> <th>ReadingDate</th> <th>MinBilling</th> <th>MinQuantity</th> <th>AccountCode</th> <th>COSAccountCode</th> <th>EscalationPeriod</th> <th>EscalationType</th> <th>EscalationAmount</th> <th>Supp</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Mono</td> <td>0.00</td> <td>01 Jan 2018</td> <td>350.00</td> <td>1000</td> <td>2101</td> <td>1100</td> <td>11</td> <td>Percentage</td> <td>10.00</td> <td></td> </tr> </tbody> </table>	Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp	<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100	11	Percentage	10.00		<table border="1"> <thead> <tr> <th colspan="3">Meter Charges</th> </tr> <tr> <th>FromQuantity</th> <th>FinanceAmount</th> <th>UnitCharge</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0.00</td> <td>30.00</td> </tr> <tr> <td>2000</td> <td>0.00</td> <td>50.00</td> </tr> </tbody> </table>	Meter Charges			FromQuantity	FinanceAmount	UnitCharge	0	0.00	30.00	2000	0.00	50.00		
Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp																												
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100	11	Percentage	10.00																													
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0	0.00	30.00																																					
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<table border="1"> <thead> <tr> <th>Colour</th> <th>StartReading</th> <th>ReadingDate</th> <th>MinBilling</th> <th>MinQuantity</th> <th>AccountCode</th> <th>COSAccountCode</th> <th>EscalationPeriod</th> <th>EscalationType</th> <th>EscalationAmount</th> <th>Supp</th> </tr> </thead> <tbody> <tr> <td></td> <td>0.00</td> <td>01 Jan 2018</td> <td>0.00</td> <td>0</td> <td></td> <td></td> <td>11</td> <td>Percentage</td> <td>10.00</td> <td></td> </tr> </tbody> </table>	Colour	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp		0.00	01 Jan 2018	0.00	0			11	Percentage	10.00																		
Colour	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp																													
	0.00	01 Jan 2018	0.00	0			11	Percentage	10.00																														

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## ITEM INCLUSIONS FRAME

---

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

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Po

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts								
Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAAccountCode	EscalationPeriod	EscalationType	EscalationAmount	Supp
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100	11	Percentage	10.00	
<input checked="" type="checkbox"/>	Colour	0.00	01 Jan 2018	0.00	0			11	Percentage	10.00	
<input type="checkbox"/>									[Edit value is null]		

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- The **Item Inclusions** frame will be expanded.
  - The Item Inclusions frame lists all **Contract Inclusions** (items which are included in the contract and not billed separately).



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## 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:** Add Part Inclusion
  - **BOM:** Add BOM Inclusion
  - **Craft:** Add Craft Inclusion
  - **Service:** Add Service Inclusion
  - **Delete:** Delete Inclusion

## Add Part Inclusion

---

- Click on **Part** - Add Part Inclusion (individual part issued to a call that will not be billed).

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees Item Meters Item Inclusions Item Contacts

Code	Description	SLAType

Process

- Part
  - Add Part Inclusion
- BOM
  - Add BOM Inclusion
- Craft
  - Add Craft Inclusion
- Service
  - Add Service Inclusion
- Delete
  - Delete Inclusion

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- An **Input Validation** message box will pop up asking;
  - **Are you sure you want to add a part inclusion to this item - [ ]?**
- Click on **Yes**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees Item Meters Item Inclusions Item Contacts

Code	Description	SLAType

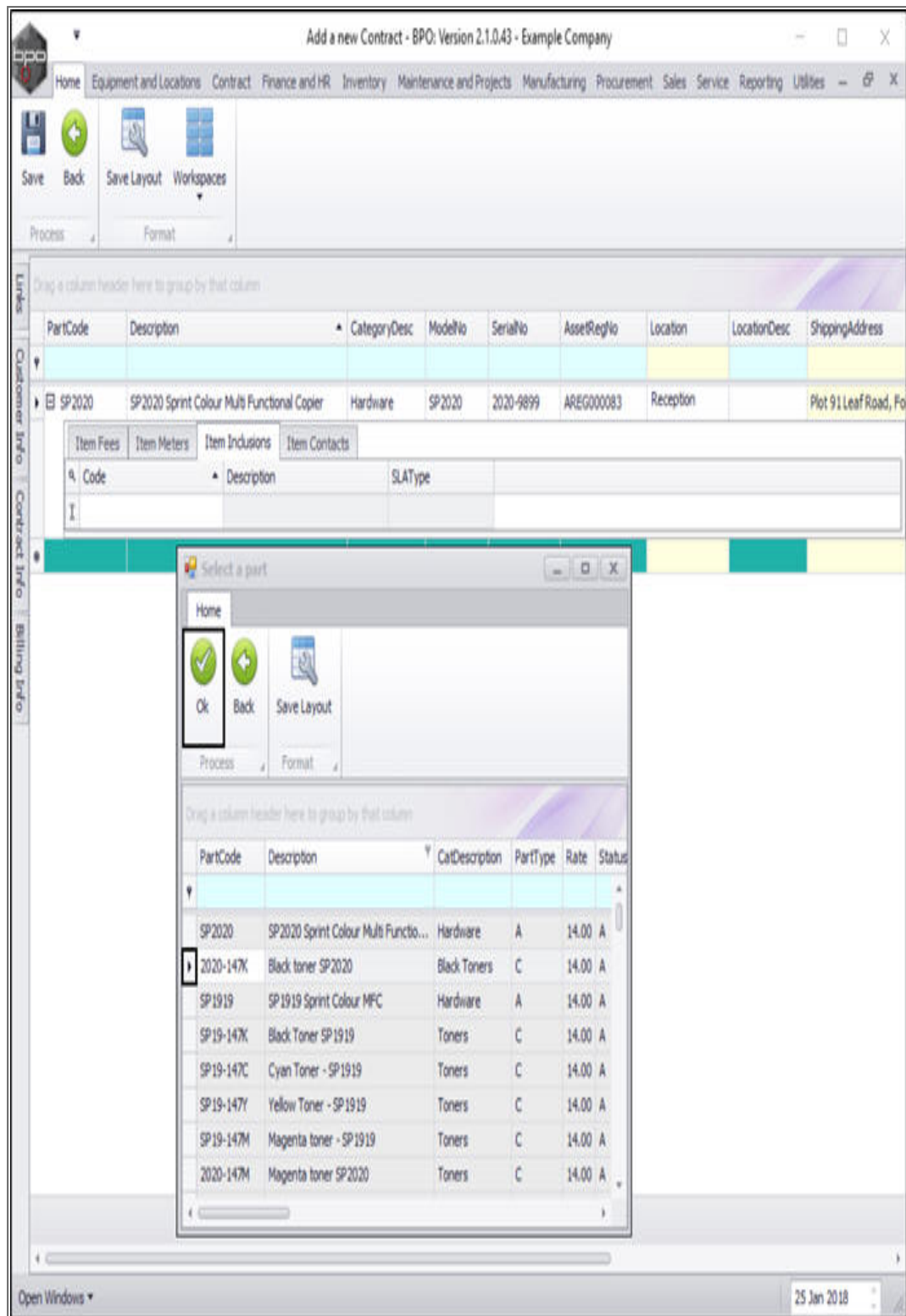
Input Validation

Are you sure you want to add a part inclusion to this item - 2020-9899?

Yes No

Open Windows 25 Jan 2018

- 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**.



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

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	

Open Windows

25 Jan 2018



## Add BOM Inclusion

---

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **BOM** - Add BOM Inclusion (contract inclusion parts issued to a call that will not be billed).

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP 2020	SP 2020 Sprint Colour Multi Functional Copier	Hardware	SP 2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	

Process

- Part
  - Add Part Inclusion
- BOM**
  - Add BOM Inclusion
- Craft
  - Add Craft Inclusion
- Service
  - Add Service Inclusion
- Delete
  - Delete Inclusion

Open Windows 25 Jan 2018

- An **Input Validation** message box will pop up asking;
  - **Are you sure you want to add a BOM inclusion to this item - [ ]?**
- Click on **Yes**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	

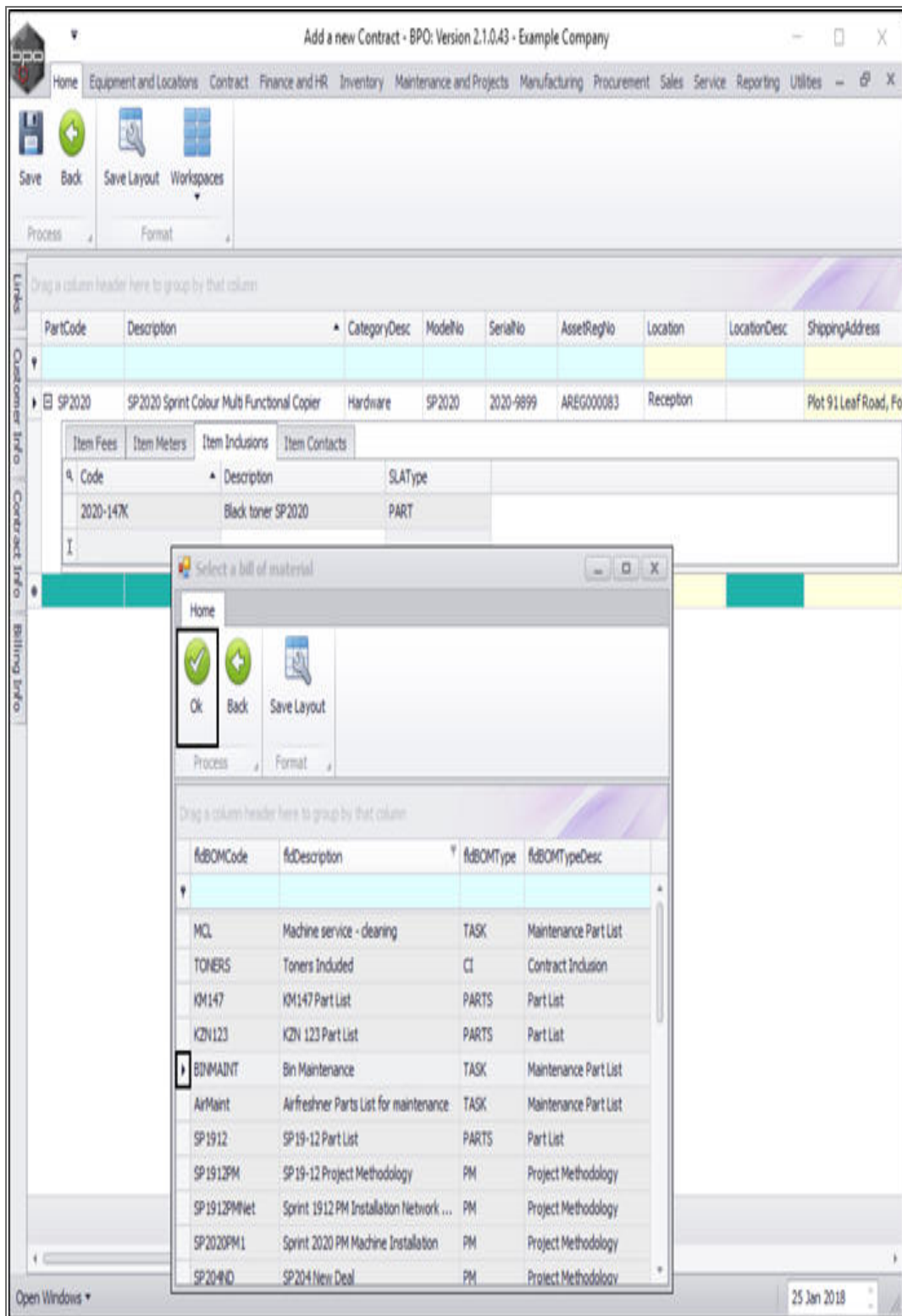
Input Validation

Are you sure you want to add a BOM inclusion to this item - 2020-9899?

Yes No

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- 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**.



- The selected BOM will be added to the Item Inclusions frame.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Po

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BDMMADNT	Bin Maintenance	BOM	

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## 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 (time logged on a call that will not be billed).



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BDMADNT	Bin Maintenance	BOM	

Process

- Part
  - Add Part Inclusion
- BOM
  - Add BOM Inclusion
- Craft**
  - Add Craft Inclusion**
- Service
  - Add Service Inclusion
- Delete
  - Delete Inclusion

Open Windows 25 Jan 2018

- An **Input Validation** message box will pop up asking;
  - **Are you sure you want to add a Craft inclusion to this item - [ ]?**
- Click on **Yes**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BINMAINT	Bin Maintenance	BOM	

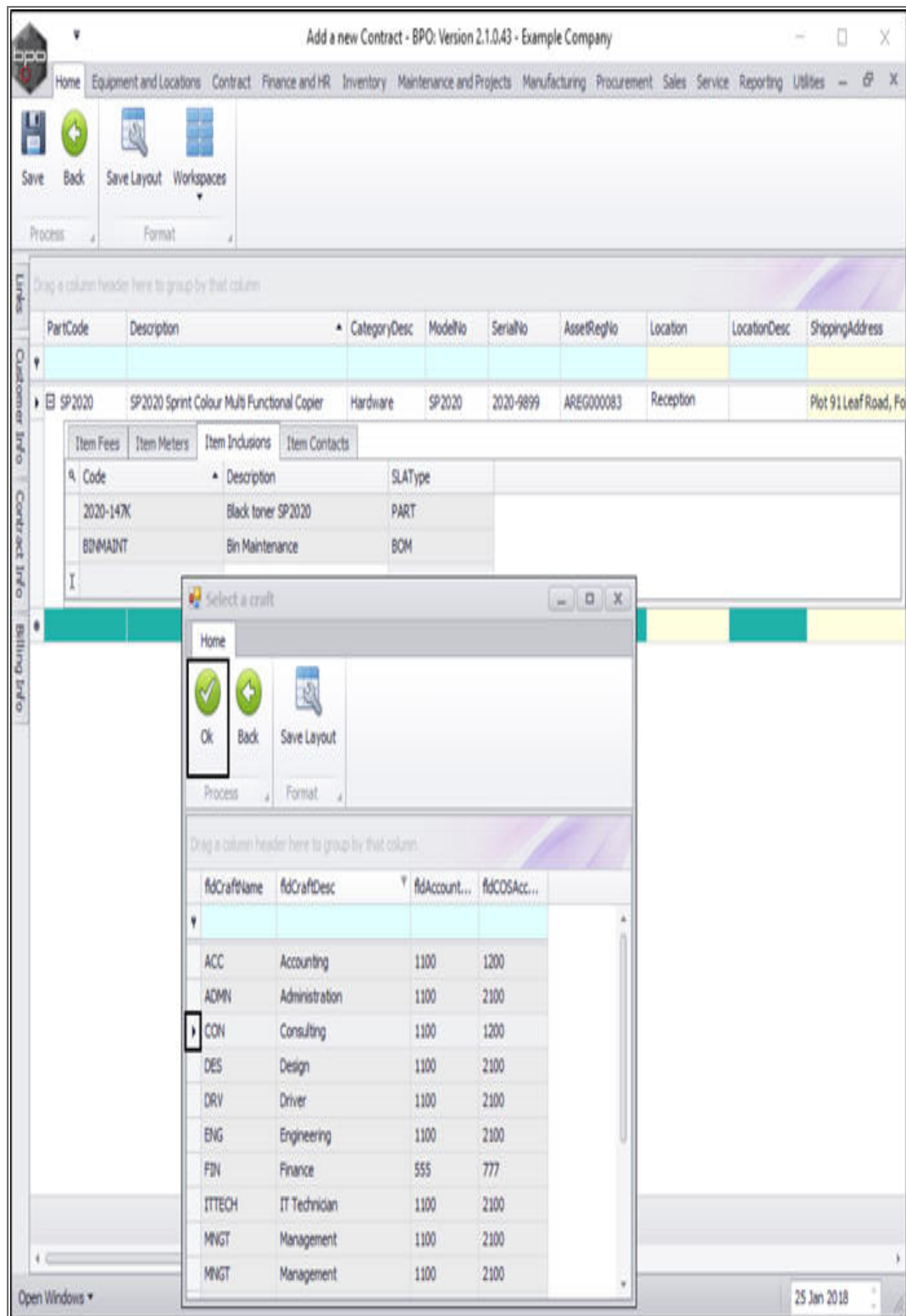
Input Validation

Are you sure you want to add a Craft inclusion to this item - 2020-9899?

Yes No

Open Windows 25 Jan 2018

- 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**.



- The selected Craft will be added to the Item Inclusions frame.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BINMAINT	Bin Maintenance	BOM	
CON	Consulting	CRFT	

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## 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 (services logged on a call that will not be billed).

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BDMADVT	Bin Maintenance	BOM	
CON	Consulting	CRFT	

Process

- Part
  - Add Part Inclusion
- BOM
  - Add BOM Inclusion
- Craft
  - Add Craft Inclusion
- Service
  - Add Service Inclusion
- Delete
  - Delete Inclusion

Open Windows 25 Jan 2018



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

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BDMADNT	Bin Maintenance	BOM	
CON	Consulting	CRPT	

Input Validation

Are you sure you want to add a Service inclusion to this item - 2020-9899?

Yes No

Open Windows 25 Jan 2018

- 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**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees Item Meters Item Inclusions Item Contacts

Code	Description	SLAType
2020-147K	Black toner SP2020	PART
BINMAINT	Bin Maintenance	BOM
CON	Consulting	CRFT

Select a service

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

ServiceCode	ServiceDescription	Type	Class	Rate	Units
STCD	Short Term Contract Deposit	EXT	SER	10.00	e
INST	Installation Fee	INT	SER	350.00	e
DEL	Delivery Fee	INT	SER	150.00	e
DEA	Dealer Service Fee	EXT	SER	350.00	e
SET	Settlements	INT	SER	500.00	e
INSP	Inspection	INT	SER	100.00	e
TOLL	Toll Fee	EXT	SER	250.00	e

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- The selected Service will be added to the Item Inclusions frame.

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

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## Delete Inclusion

---

- The final 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 **CON** - Consulting has been selected.
- The **Process** menu will pop up.
- Click on **Delete** - Delete Inclusion.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG0000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BINMAINT	Bin Maintenance	BOM	
CON		CRAFT	
INST		SERV	

Process

- Part
  - Add Part Inclusion
- BOM
  - Add BOM Inclusion
- Craft
  - Add Craft Inclusion
- Service
  - Add Service Inclusion
- Delete
  - Delete Inclusion

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- An **Input Validation** message box will pop up asking;
  - **Are you sure you want to delete this item inclusion - [ ]?**
- Click on **Yes**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BINMAINT	Bin Maintenance	BOM	
CON	Consulting	CRFT	
INST	Installation Fee	SERV	

Delete Row

Are you sure you want to delete this item inclusion CON?

Yes No

Open Windows 25 Jan 2018

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

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Po

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
BDMADNT	Bin Maintenance	BOM	
INST	Installation Fee	SERV	

Open Windows 25 Jan 2018

## ITEM CONTACTS

---

- When you have finished working in the Items Inclusions frame, click on the **Item Contacts** tab.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Po

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
Code	Description	SLAType	
2020-147K	Black toner SP2020	PART	
B2MADNT	Bin Maintenance	BOM	
INST	Installation Fee	SERV	

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- The Item Contacts frame will be **expanded**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Po

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
	[EditValue is null]	[EditValue is null]	

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## Add a Contact

---

- **Right click** anywhere in the first **row** of the **Item Contacts** frame.
- A **Process** menu will pop up.
- Click on **Contact** - Add a contact.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Po

Customer Info Contract Info Billing Info

ContactName	ContactType	ContactMethod	ContactEmail	ContactPhoneNumber	ContactMobile	IsMeterContact
	[Edit value is null]	[Edit value is null]				

Process

Contact Add a contact

Delete Delete the contact

Open Windows 25 Jan 2018

- A **Process Validation** message box will pop up asking;
  - **Are you sure you want to add a contact to this item**  
- [ ]?
- Click on **Yes**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP 2020	SP 2020 Sprint Colour Multi Functional Copier	Hardware	SP 2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
	[EditValue is null]	[EditValue is null]	

Input Validation

Are you sure you want to add a contact to this item - 2020-9899?

Yes No

Open Windows 25 Jan 2018

- A **Select a contact** pop up screen will appear.
- Click on the **row selector** in front of the **contact** you wish to **add**.
- Click on **Ok**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees Item Meters Item Inclusions Item Contacts

ContactName	ContactType	ContactMethod	ContactEmail	ContactPhoneNumber	ContactMobile	IsMeterContact

Select a contact

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

Contact...	ContactTypeDesc	ContactFirstName	ContactSurname	ContactName
ACCOUNTS	Accounts Contact	Mandy	Jefferson	Mandy Jefferson
MNGT	Management	Emma	Rowe	Emma Rowe
MNGT	Management	Jason	King	Jason King
MNGT	Management	Kelly	Jones	Kelly Jones
STD	Standard Contact	Davina	Rowe	Davina Rowe
STD	Standard Contact	Julia	Ritson	Julia Ritson
STD	Standard Contact	Lucinda	Rowe	Lucinda Rowe

Open Windows

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- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address already set up on the selected contact.
- **Contact Phone Number:** This will auto populate with the phone number already set up on the selected contact.
- **Contact Mobile:** This will auto populate with the mobile number already set up on the selected contact.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Utilities

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Davina Rowe			davinar@hopeworks.co.za
			031 123 4567
			012 345 6789

IsMeterContact

Open Windows

25 Jan 2018

- Click in the **Contact Type** text box to reveal a drop-down arrow.
- Click on this arrow to display a **Contact Type** drop-down **menu**.
- Click on the **contact type** you wish to assign to this Item.
  - In this image **User Contact** has been selected.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees Item Meters Item Inclusions Item Contacts

ContactName	ContactType	ContactMethod	ContactEmail	ContactPhoneNumber	ContactMobile	IsMeterContact
Davina Rowe			davinar@hopeworks.co.za	031 123 4567	012 345 6789	<input type="checkbox"/>

Type Description

MNGR Manager Contact

MTRM Meter Ckcs Contact

USER User Contact

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- Click in the **Contact Method** text box to reveal a drop-down arrow.
- Click on this arrow to display a **Contact Method** drop-down menu.
- Click on the **preferred contact method** you wish to use.
  - In this image **Email** has been selected.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9999	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Davina Rowe	User Contact		davinar@hopeworks.co.za
		ContactPhoneNumber	ContactMobile
		031 123 4567	012 345 6789
		IsMeterContact	

Method Description

EMAIL Email

FAX Fax

SMS SMS

TEL Telephone

Open Windows 25 Jan 2018

- **Is Meter Contact:** Click on this check box to see the contact in the relevant **month end billing run meter** capture screens and reports.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Utilities

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9999	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Davina Rowe	User Contact	Email	davinar@hopeworks.co.za

031 123 4567 012 345 6789

IsMeterContact

Open Windows

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- You can add further contacts to this frame by **right clicking** anywhere in a **row** of the **Item Contacts** frame and following the same process as above.
  - In this image a **second contact** has been added.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Jason King	Meter Clicks Contact	Email	jasonk@hopeworks.co.za
Davina Rowe	User Contact	Email	davinar@hopeworks.co.za

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## Delete a Contact

---

- You can also **delete** a contact if required.
- **Right click** in the **row** of the **contact** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** - Delete the contact.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Jason King	Meter Clicks Contact	Email	jasonk@hopeworks.co.za
Davina Rowe		Email	davinar@hopeworks.co.za

Process

Contact Add a contact

Delete Delete the contact

Open Windows 25 Jan 2018

- A **Delete Row** message box will pop up asking;
  - **Are you sure you want to delete this item contact [ ]?**
- Click on **Yes**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Jason King	Meter Clicks Contact	Email	jasonk@hopeworks.co.za
Davina Rowe	User Contact	Email	davinar@hopeworks.co.za

Are you sure you want to delete this item contact Jason King?

Yes No

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- The contact has now been **deleted** from the Items Contacts frame.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Customer Info Contract Info Billing Info

Item Fees	Item Meters	Item Inclusions	Item Contacts
ContactName	ContactType	ContactMethod	ContactEmail
Davina Rowe	User Contact	Email	davinar@hopeworks.co.za

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- When you have finished working in the machine Item Frames, click on the **hide** button in the part code text box.

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## ADD NEW LOCATION ITEM

---

- **Right click** in anywhere in a **row** of the **Parts** frame.
- A **Process** menu will pop up.
- Select **Location** - Add New Location Item.



Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Process

- Machine  
Add New Machine Item
- Location  
Add New Location Item
- Delete  
Delete Item

Open Windows

25 Jan 2018

- A **Select an item location** pop up screen will appear.
- Click on the **row selector** in front of the **item location** you wish to **add**.
- Click on **Ok**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road, Fo

Select an item location

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

FundLocDescription	Category	Class	Type	WOAttachment	GenTasks
First Floor	DEDEDE	DEDE	DE	No	Yes
First Floor	DEDEDE	DEDE	DE	No	Yes
Forest Hills Centre	DEDEDE	DEDE	DE	Yes	Yes
Hillcrest Centre	MAMNGR	MAMN	MA	Yes	Yes
Hope Farmers Market	LCBUCS	LCBU	LC	No	No
Jolly Farm Centre	DEDEDE	DEDE	DE	No	Yes
Kloof Corner Mall	LCBUCS	LCBU	LC	No	Yes
Kloof Corner Mall - First Floor	LCBUCS	LCBU	LC	No	Yes
Lilies Quarter Centre	DEDEDE	DEDE	DE	No	Yes
NewHopeMall	DEDEDE	DEDE	DE	No	No
NON CLIENT BPOV2 TEST	LCARAL	LCAR	LC	No	No

Open Windows

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- The selected item location will now populate the **Location Description** text box.
- Follow the same processes as above to **add information** to this location row as required.
  - **Note:** In the Items Frame, there will be no option to add Item Meters as this is a Location Contract not a Machine Contract.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
							Forest Hills Centre	
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road

Customer Info Contract Info Billing Info

Open Windows 25 Jan 2018

- You can continue to add contract machine items or contract location items as required, however additional items can also be added later.

### **SAVE THE CONTRACT**

---

- When you are finished, click on **Save**.

Add a new Contract - BPO: Version 2.1.0.43 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Drag a column header here to group by that column

PartCode	Description	CategoryDesc	ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	ShippingAddress
						Office 1	Forest Hills Centre	1 Postal, Address
SP2020	SP2020 Sprint Colour Multi Functional Copier	Hardware	SP2020	2020-9899	AREG000083	Reception		Plot 91 Leaf Road

Links Customer Info Contract Info Billing Info

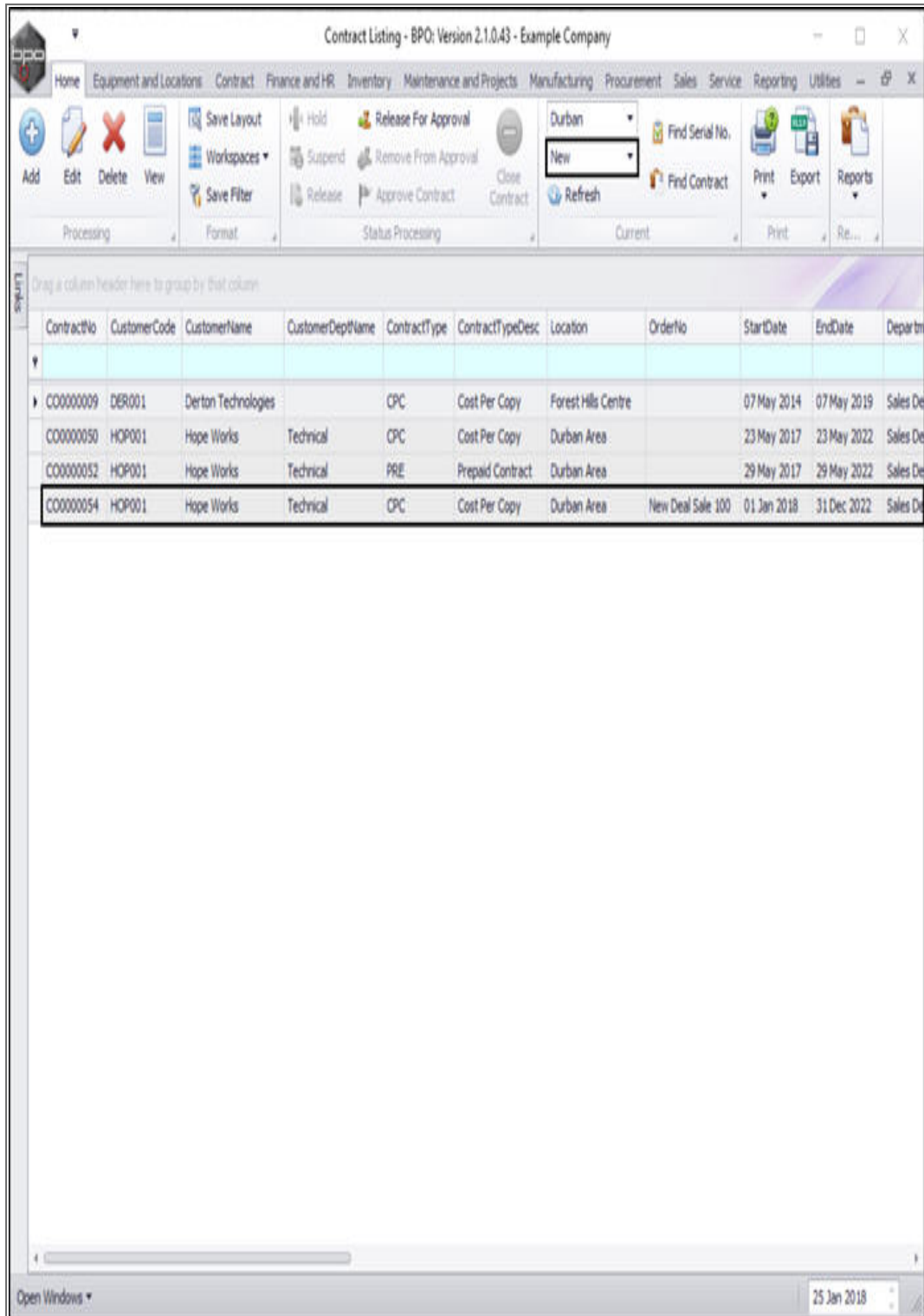
Open Windows 25 Jan 2018

- The new contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**.
- Click on the drop-down arrow in the status field and select the **New** status.



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- The new contract can be found within the **New** contract status listing screen.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Department
CO0000009	DER001	Derton Technologies		CPC	Cost Per Copy	Forest Hills Centre		07 May 2014	07 May 2019	Sales De
CO0000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales De
CO0000052	HOP001	Hope Works	Technical	PRE	Prepaid Contract	Durban Area		29 May 2017	29 May 2022	Sales De
CO0000054	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	New Deal Sale 100	01 Jan 2018	31 Dec 2022	Sales De

## RELEASE AND APPROVE A CONTRACT

---

- From here the contract will need to be **Released** and then **Approved** before it becomes active.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

Add Edit Delete View Save Layout Workspaces Save Filter Hold Suspend Release Remove From Approval Approve Contract Close Contract

Durban New Find Serial No. Find Contract Print Export Reports Refresh

Processing Format Status Processing Current Print Re...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Department
CO0000009	DER001	Derton Technologies		CPC	Cost Per Copy	Forest Hills Centre		07 May 2014	07 May 2019	Sales De
CO0000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales De
CO0000052	HOP001	Hope Works	Technical	PRE	Prepaid Contract	Durban Area		29 May 2017	29 May 2022	Sales De
CO0000054	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	New Deal Sale 100	01 Jan 2018	31 Dec 2022	Sales De

Open Windows 25 Jan 2018

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