

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

CONTRACT

CLOSE CONTRACT

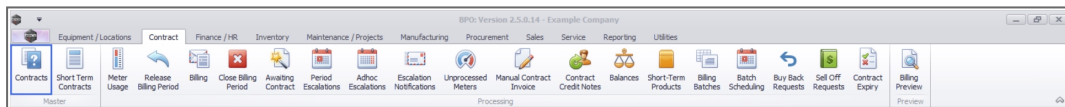
When a contract comes to an end, the contract must be closed and approved.



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

SELECT THE CONTRACT TO CLOSE

Ribbon Select **Contract > Contracts**



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

Select the Site

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

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

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

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

Home

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Contract

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Workspaces

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Hold

Suspend

Release

Release For Approval

Remove From Approval

Approve Contract

Approve Closure

Decline Closure

Close Contract

Status Processing

Durban

Active

Refresh

Find Serial No.

Find Contract

Print

Export

Reports

Current

Print

Repo...

Processing

Format

Status Processing

Links

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Drag a column header here to group by that column

| ContractNo | CustomerC | CustomerName | CustomerO | ContractType | ContractTy | Location | OrderNo | StartDate | EndDate | Department | Period | PeriodType | BillingCycle | BillingPeriod | Bills |
|------------|-----------|---------------------------|-----------|--------------|--------------|---------------|---------|------------|------------|-----------------|-----------|------------|--------------|---------------|-------|
| CO000009 | DER001 | Derton / Technologies | | CPC | Cost Per Co. | Durban Area | | 07/05/2014 | 07/05/2019 | Sales Depart... | 60 Months | Months | Months | | 3 |
| CO000016 | TIA001 | Titan Group | | CPC | Cost Per Co. | Main | | 13/06/2014 | 13/06/2019 | Sales Depart... | 60 Months | Months | Months | | 4 |
| CO000018 | SAM001 | Samanthas Diner | | CPC | Cost Per Co. | Main | | 09/07/2014 | 09/07/2019 | Sales Depart... | 60 Months | Months | Months | | 5 |
| CO000019 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co. | Main | | 28/07/2014 | 28/07/2019 | Sales Depart... | 60 Months | Months | Bi-annual | | 6 |
| PC000001 | DAN002 | Dancing Shoes | | PBE | Prepaid Con. | Kloof | test | 23/03/2016 | 23/03/2021 | Sales Depart... | 60 Months | Months | Months | | 1 |
| CO000031 | YES001 | Young Electric | | CPC | Cost Per Co. | Hilcrest | | 24/03/2016 | 24/03/2021 | Sales Depart... | 60 Months | Months | Months | | 1 |
| CO000041 | PAN001 | Panda Copiers | | CPC | Cost Per Co. | Main | | 05/07/2016 | 05/07/2021 | Sales Depart... | 60 Months | Months | Months | | 5 |
| CO000042 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Main | | 07/09/2016 | 07/09/2022 | Sales Depart... | 60 Months | Months | Months | | 7 |
| CO000043 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Main | | 01/08/2016 | 07/09/2021 | Sales Depart... | 60 Months | Months | Quarterly | | 5 |
| CO000052 | HOP001 | Hope Works (Pty) Ltd | | PBE | Prepaid Con. | Durban Area | | 29/05/2017 | 29/05/2022 | Sales Depart... | 60 Months | Months | Months | | 3 |
| CO000054 | APP0001 | Apple Juice Inc | | CPC | Cost Per Co. | Durban Area | | 03/08/2017 | 03/08/2022 | Sales Depart... | 60 Months | Months | Months | | 0 |
| CO000072 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | 1234 | 07/03/2018 | 07/03/2023 | Sales Depart... | 60 Months | Months | Months | | 2 |
| CO000073 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | | 29/05/2018 | 29/05/2023 | Sales Depart... | 60 Months | Months | Months | | 0 |
| CO000074 | DER001 | Derton / Technologies | | CPC | Cost Per Co. | Durban Area | 1234 | 15/06/2018 | 15/06/2023 | Sales Depart... | 60 Months | Months | Months | | 6 |
| CO000077 | PRK001 | Pink Shoes | | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depart... | 60 Months | Months | Months | | 4 |
| CO000078 | PRK001 | Pink Shoes | | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depart... | 60 Months | Months | Months | | 4 |
| CO000080 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co. | Durban Cen... | 1234 | 06/05/2020 | 06/05/2020 | Sales Depart... | 60 Months | Months | Months | | 2 |
| CO000082 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | | 10/09/2019 | 10/09/2024 | Sales Depart... | 60 Months | Months | Months | | 7 |
| CO000079 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depart... | 60 Months | Months | Months | | 4 |
| CO000083 | WES001 | Westwood Dynamic | | CPC | Cost Per Co. | Durban Area | 1234 | 15/10/2019 | 15/10/2024 | Sales Depart... | 60 Months | Months | Months | | 8 |

Open Windows

User : BiancaD 21/10/2022 Version : 2.5.0.14 Example Company

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

CLOSE CONTRACT

Click on **Close Contract**.

My Close Contract button is greyed out:

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

| ContractNo | CustomerC | CustomerName | ContractType | ContractFY | Location | OrderNo | StartDate | EndDate | Department | Period | PeriodType | BillingCycle | BillingPeriod | BillTo |
|------------|-----------|---------------------------|--------------|--------------|-------------|---------|------------|------------|---------------|--------|------------|--------------|---------------|--------|
| CO000009 | DER001 | Derton / Technologies | CPC | Cost Per Co. | Durban Area | | 07/05/2014 | 07/05/2019 | Sales Depart. | 60 | Months | Monthly | 3 | |
| CO000008 | TS001 | Titan Group | CPC | Cost Per Co. | Main | | 13/06/2014 | 13/06/2019 | Sales Depart. | 60 | Months | Monthly | 4 | |
| CO000008 | SAP001 | Samarthas Diner | CPC | Cost Per Co. | Main | | 06/07/2014 | 06/07/2019 | Sales Depart. | 60 | Months | Monthly | 5 | |
| CO000009 | OPF001 | Office Supplies Unlimited | CPC | Cost Per Co. | Main | | 28/07/2014 | 28/07/2019 | Sales Depart. | 60 | Months | Bi-annual | 6 | |
| PC000001 | DA002 | Dancing Shoes | RSE | Prepaid Con. | Kloof | test | 23/03/2016 | 23/03/2021 | Sales Depart. | 60 | Months | Monthly | 1 | |
| CO000001 | YEO001 | Young Electric | CPC | Cost Per Co. | Hillcrest | | 24/03/2016 | 24/03/2021 | Sales Depart. | 60 | Months | Monthly | 1 | |
| CO000004 | PA001 | Panda Capers | CPC | Cost Per Co. | Main | | 05/07/2016 | 05/07/2021 | Sales Depart. | 60 | Months | Monthly | 5 | |
| CO000004 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Co. | Main | | 07/06/2016 | 07/06/2021 | Sales Depart. | 60 | Months | Monthly | 7 | |
| CO000004 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Co. | Main | | 01/06/2016 | 07/06/2021 | Sales Depart. | 60 | Months | Quarterly | 5 | |
| CO000002 | HOP001 | Hope Works (Pty) Ltd | RSE | Prepaid Con. | Durban Area | | 26/05/2017 | 26/05/2022 | Sales Depart. | 60 | Months | Monthly | 3 | |
| CO000004 | APP0001 | Apple Juice Inc | CPC | Cost Per Co. | Durban Area | | 03/06/2017 | 03/06/2022 | Sales Depart. | 60 | Months | Monthly | 0 | |
| CO000002 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Co. | Durban Area | 1234 | 07/03/2018 | 07/03/2023 | Sales Depart. | 60 | Months | Monthly | 2 | |
| CO000003 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Co. | Durban Area | | 26/05/2018 | 26/05/2023 | Sales Depart. | 60 | Months | Monthly | 0 | |
| CO000004 | DER001 | Derton / Technologies | CPC | Cost Per Co. | Durban Area | 1234 | 15/06/2018 | 15/06/2023 | Sales Depart. | 60 | Months | Monthly | 6 | |
| CO000007 | PP0001 | Pink Shoes | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depart. | 60 | Months | Monthly | 4 | |
| CO000007 | PP0001 | Pink Shoes | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depart. | 60 | Months | Monthly | 4 | |
| CO000006 | OPF001 | Office Supplies Unlimited | CPC | Cost Per Co. | Durban Area | 1234 | 06/05/2017 | 06/05/2022 | Sales Depart. | 60 | Months | Monthly | 2 | |
| CO000006 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2024 | Sales Depart. | 60 | Months | Monthly | 7 | |
| CO000007 | HOP001 | Hope Works (Pty) Ltd | CPC | Cost Per Co. | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depart. | 60 | Months | Monthly | 4 | |
| CO000003 | WES001 | Westwood Dynamic | CPC | Cost Per Co. | Durban Area | 1234 | 15/10/2019 | 15/10/2024 | Sales Depart. | 60 | Months | Monthly | 8 | |

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

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

Closure Comments

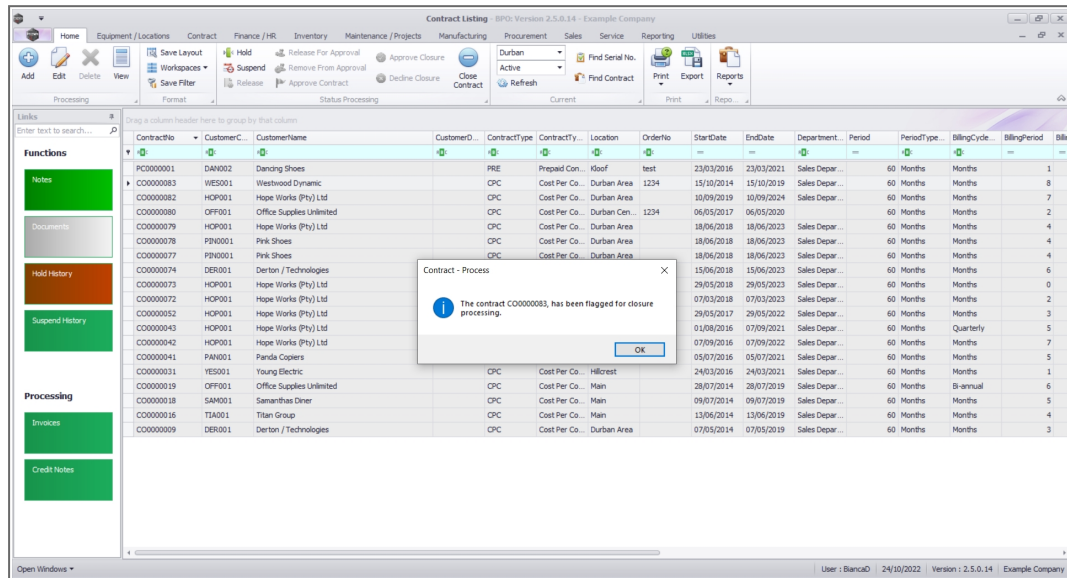
Contract has come to the end of its term. This contract will not be extended. Client will be signing a new contract.

Home Save Back

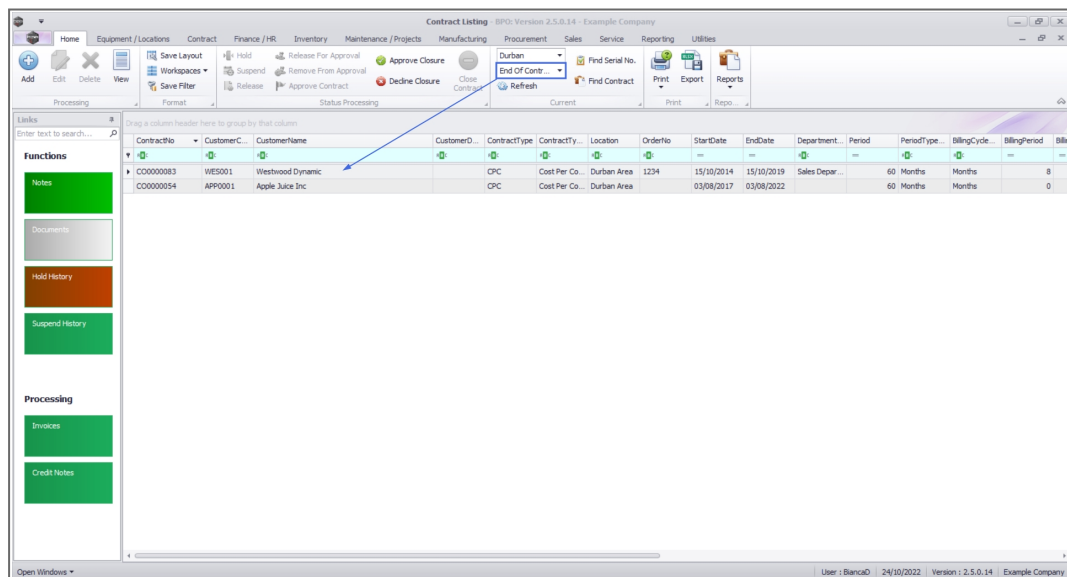
A **Contract - Process** message box will display, informing you that:

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

- Click on **Ok**.



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



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

BPO2.CTRT.MNGT.0001

