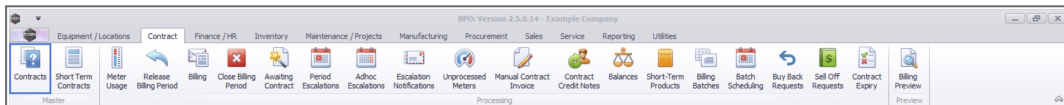


We are currently updating our site; thank you for your patience.

CONTRACT

CONTRACTS – ITEM CONTACT

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

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

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

Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

<

- Click on the **Edit** button.

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

Maintenance for Contract No.: CO0000016 - Status: A - BPO: Version 2.5.1.4 - Example Company

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

Save Back Save Layout Workspaces Process Format

Links: Enter text to search...

Functions: Notes, Documents, Hold History, Suspend History, Processing: Invoices, Credit Notes

Contract Info

Contract No: CO0000016

Contract Type: Cost Per Copy

Contract Class: [Dropdown]

Contract Category: [Dropdown]

Start Date: 13/06/2014

End Date: 13/06/2019

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Carolina Suzzetta Lourens van de ...

Salesman: Belinda Sharnan

Aggregate Billing: ☐

Hide Fee Detail: ☐

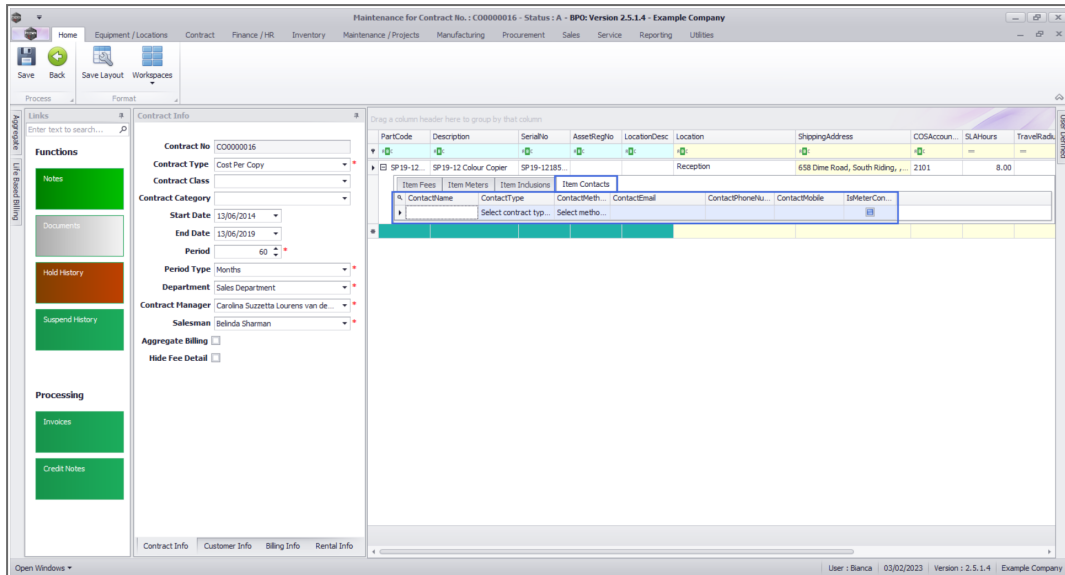
PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccount	SLARef
SP 19-12...	SP 19-12 Colour Copier	SP 19-12185...		Reception		658 Dime Road, South Ridg...	2101	

Contract Info Customer Info Billing Info Rental Info

Open Windows User : Bianca 09/02/2023 Version : 2.5.1.4 Example Company

ITEM CONTACTS

- Ensure you have the contract item selected and then click on the **Item Contacts** tab.
- The **Item Contacts** frame will be **expanded**.

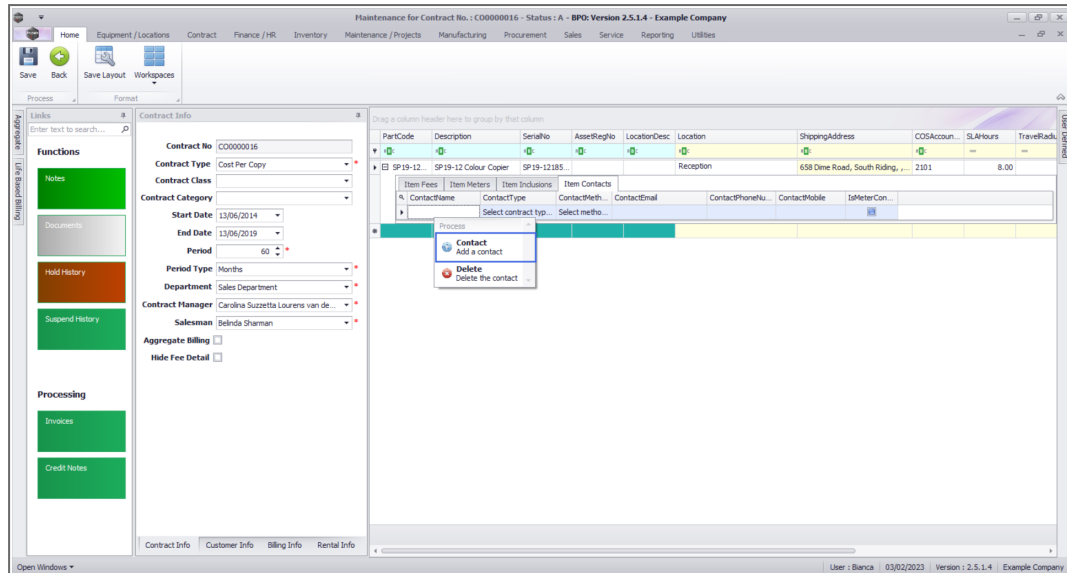


You can add up to 3 types of contacts, depending on your requirements:

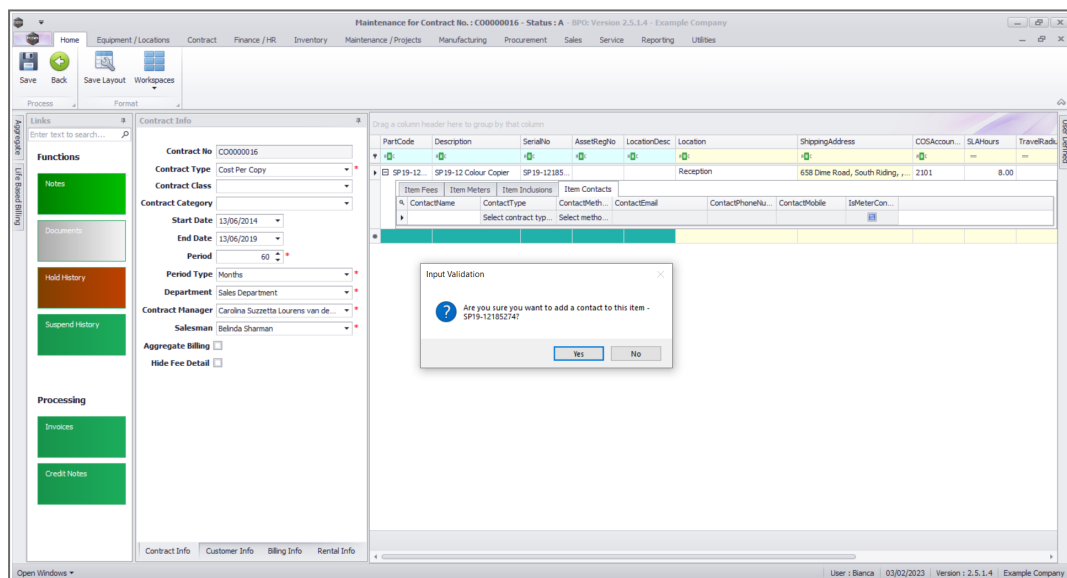
- **Manager Contact:** the client contact who manages the contract or relevant contract item
- **Meter Clicks Contact:** the client contact who will provide meter readings.
- **User Contact:** the client contact who can be called with regards to user queries.

ADD A CONTACT

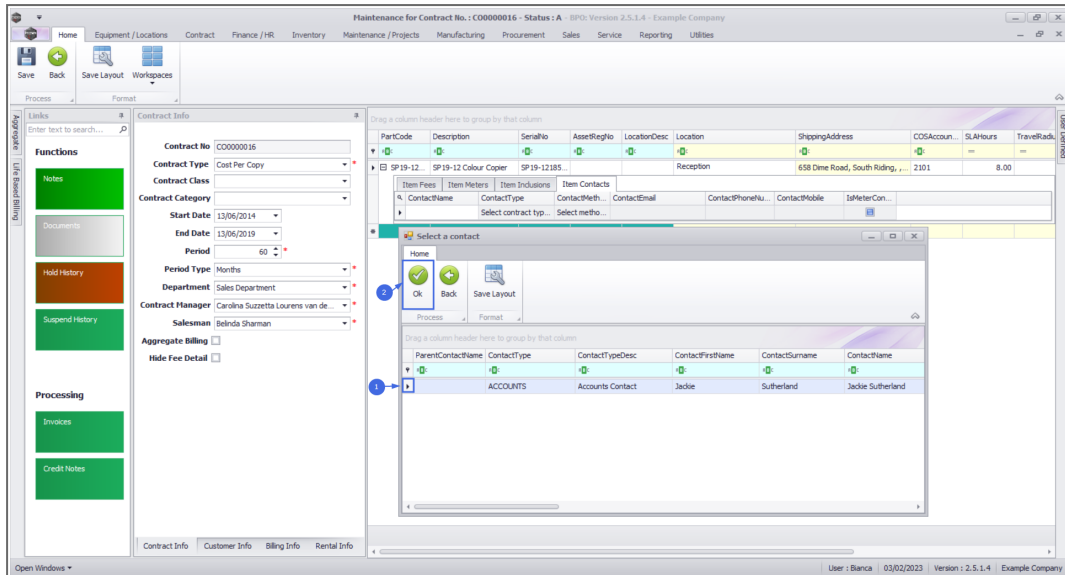
- **Right click** anywhere in the first **row** of the **Item Contacts** frame.
- A **Process** menu will pop up.
- Click on **Contact** - Add a contact.



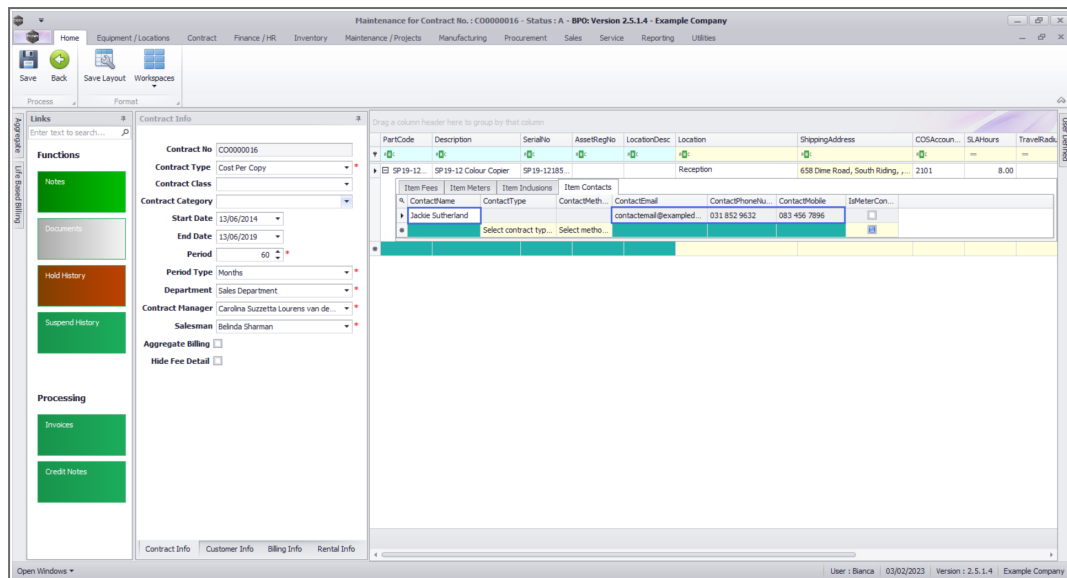
- A **Process Validation** message box will pop up asking:
 - **Are you sure you want to add a contact to this item**
 - [Serial Number or Location Description]?
- Click on **Yes**.



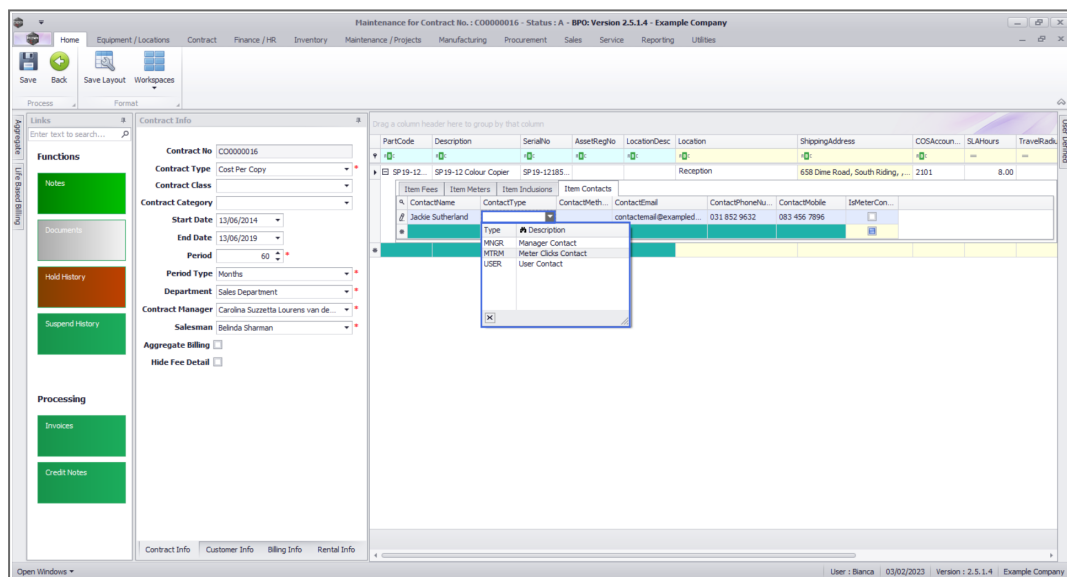
- A **Select a contact** pop up screen will appear.
- Click on the **row selector** in front of the **contact** you wish to **add**.
- Click on **Ok**.



- **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.**

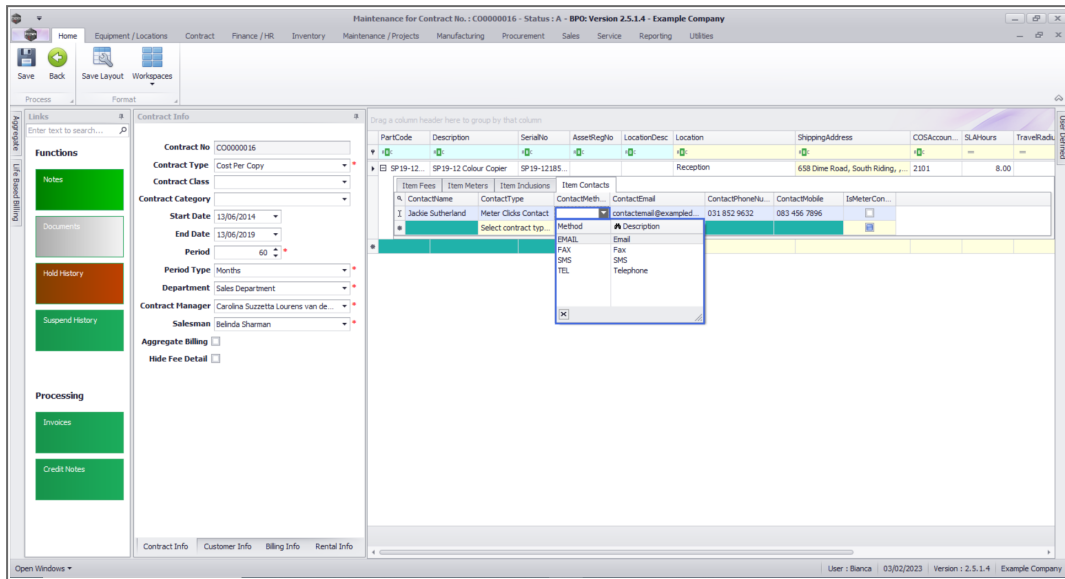


- Click in the **Contact Type** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Type** drop-down **menu**.
- Click on the **contact type** you wish to assign to this Item.

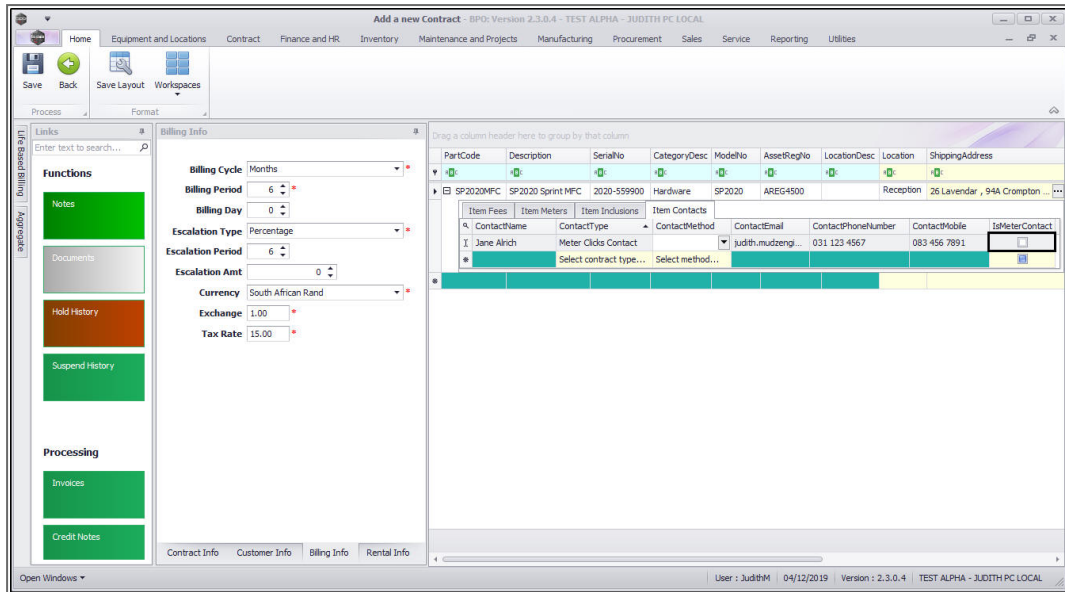


- Click in the **Contact Method** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Method** drop-down **menu**.

- Click on the **preferred contact method** you wish to use.
- In this image **Email** has been selected.



- **Is Meter Contact:** Select this check box for the main meter contact - this is important where meter charges have been linked to the contract item, as this contact will display in the Meter Capture screens (Unprocessed Meters and Meter Usage) and will be used when sending Meter Reading Email Requests.



Add a new Contract - BPD: Version 2.3.0.4 - TEST ALPHA - JUDITH PC LOCAL

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 Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Billing Info

Billing Cycle Months

Billing Period 6

Billing Day 0

Escalation Type Percentage

Escalation Amt 6

Escalation Period 0

Currency South African Rand

Exchange 1.00

Tax Rate 15.00

Contract Info Customer Info Billing Info Rental Info

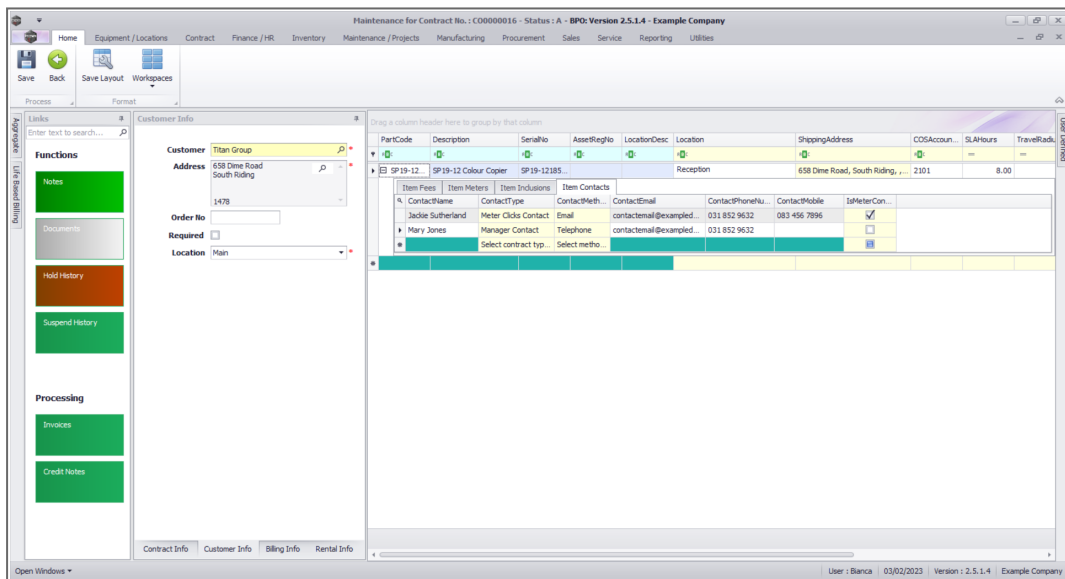
Open Windows

User: JudithM 04/12/2019 Version: 2.3.0.4 TEST ALPHA - JUDITH PC LOCAL

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location	ShippingAddress
SP2020MFC	SP2020 Sprint MFC	2020-559900	Hardware	SP2020	AREG4500	Reception	26 Lavendar , 94A Crompton ...	

Item Fees	Item Meters	Item Inclusions	Item Contacts
A. ContactName	ContactType	ContactMethod	ContactEmail
J. Jane Alrich	Meter Clicks Contact	judith.mudzengi...	031 123 4567
	Select contract type...	Select method...	

- 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.



Maintenance for Contract No. : C00000016 - Status : A - BPD: Version 2.5.1.4 - Example Company

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

Save Back Save Layout Workspaces

Process Format

Links Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Customer Info

Customer Titan Group

Address 658 Dime Road South Riding

Order No 1478

Required

Location Man

Contract Info Customer Info Billing Info Rental Info

Open Windows

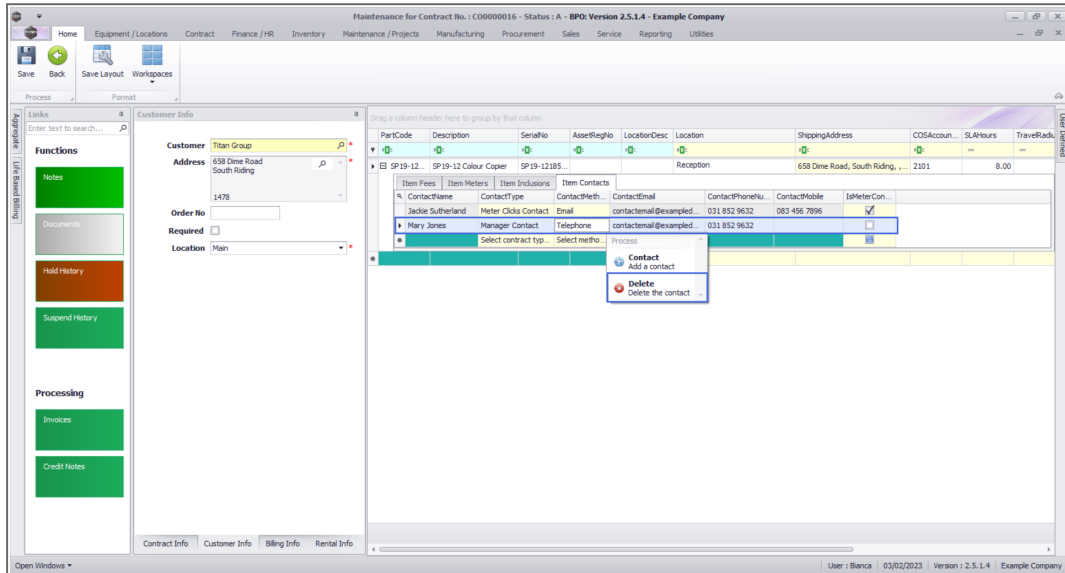
User: Bianca 03/02/2023 Version: 2.5.1.4 Example Company

PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccount	SLAHours	TravelRad
SP19-12	SP19-12 Colour Copier	SP19-12185...		Reception	658 Dime Road, South Riding, ...	2101	8.00		

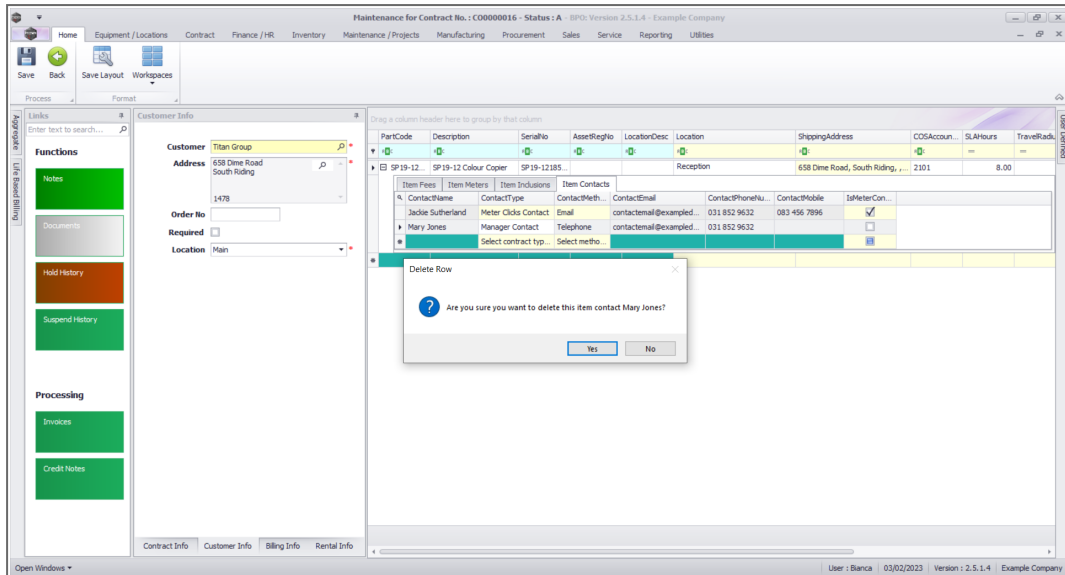
Item Fees	Item Meters	Item Inclusions	Item Contacts
A. ContactName	ContactType	ContactMethod	ContactEmail
Jackie Sutherland	Meter Clicks Contact	Email	contactemail@example...
Mary Jones	Manager Contact	Telephone	contacttel@example...
	Select contract typ...	Select metho...	

DELETE A CONTACT

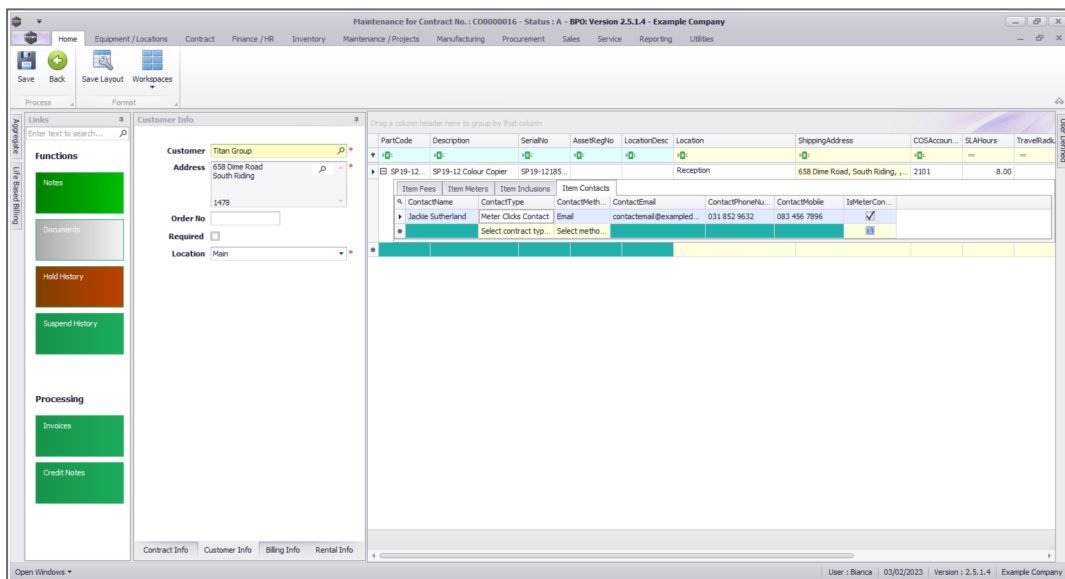
- You can also **delete** a contact if required.
- **Right click** in the **row** of the **contact** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** - Delete the contact.



- A **Delete Row** message box will pop up asking:
 - **Are you sure you want to delete this item contact [Serial Number or Location Description]?**
- Click on **Yes**.

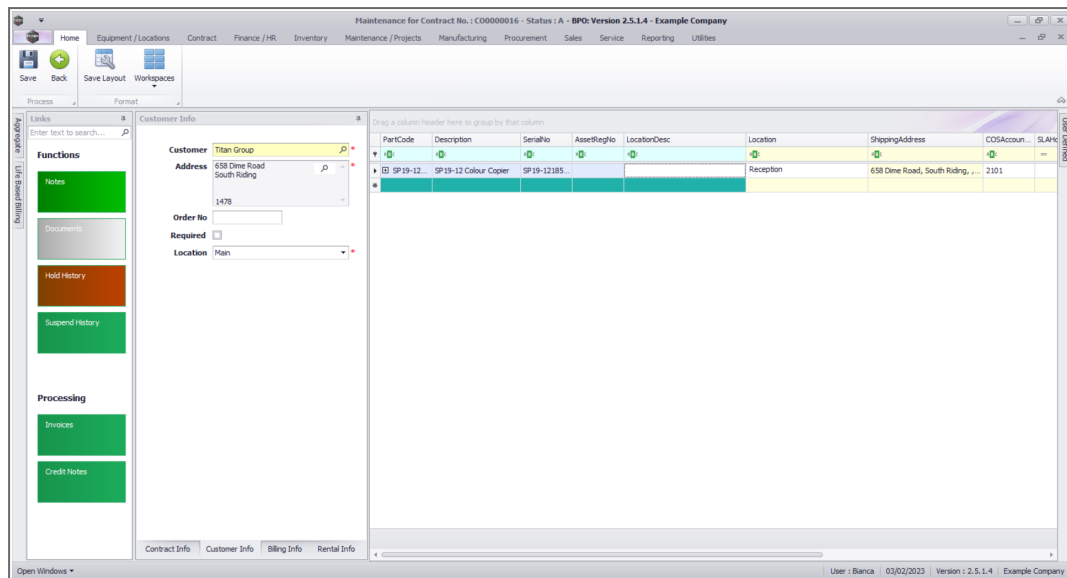


- The contact has now been **deleted** from the **Items Contacts** frame.

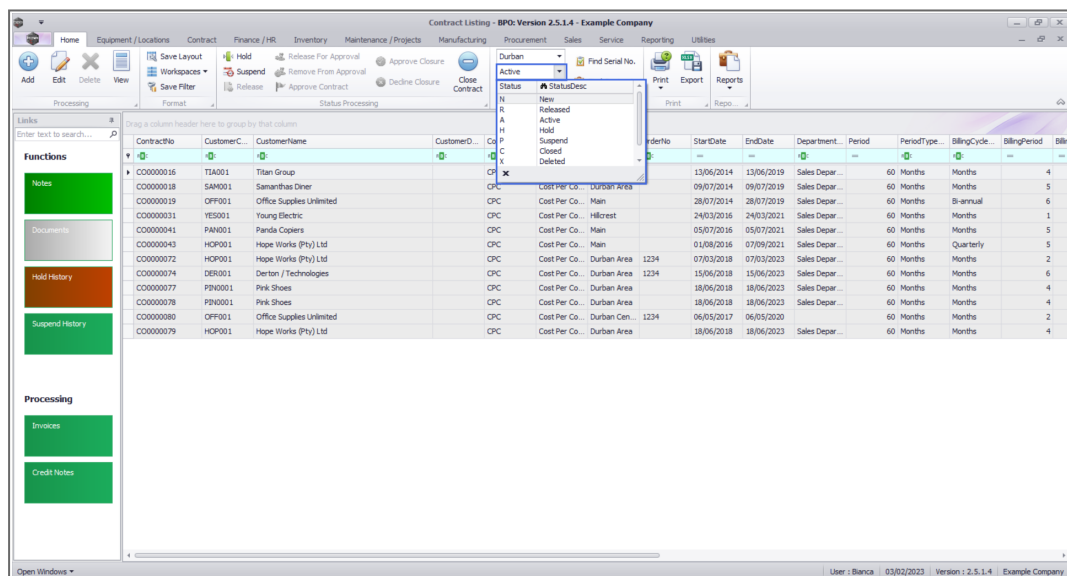


SAVE THE CONTRACT

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



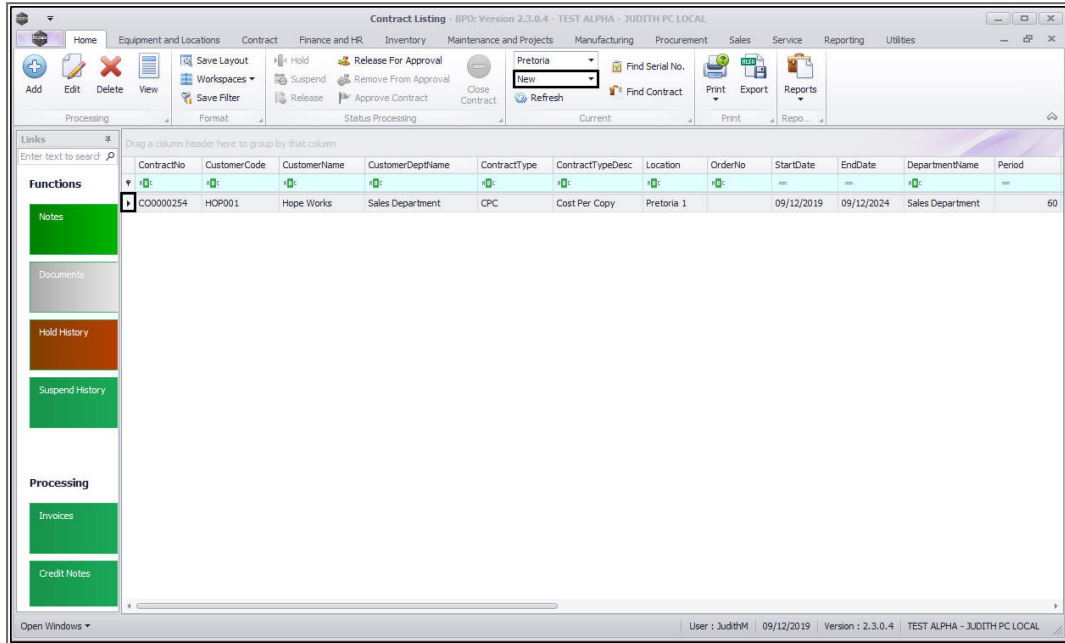
- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



ContractNo	CustomerC	CustomerName	CustomerID	ContractID	Status	StartDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillingAmount
CO000016	TIA001	Titan Group			Active	13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	4		
CO000018	SAH001	Samanthas Diner			Active	09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	5		
CO000019	OFF001	Office Supplies Unlimited			Active	28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual	6		
CO000031	YES001	Young Electric			Active	24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	1		
CO000041	PAN001	Panda Copiers			Active	05/07/2016	05/07/2021	Sales Depart...	60 Months	Months	5		
CO000043	HCP001	Hope Works (Pty) Ltd			Active	01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	5		
CO000072	HCP001	Hope Works (Pty) Ltd			Active	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	2		
CO000074	DER001	Derton / Technologies			Active	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	6		
CO000077	PIH0001	Pink Shoes			Active	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4		
CO000078	PIH0001	Pink Shoes			Active	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4		
CO000080	OFF001	Office Supplies Unlimited			Active	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months	2		
CO000079	HCP001	Hope Works (Pty) Ltd			Active	18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4		

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

- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- **Edited** contracts may either remain in **Active** status or move to **Released** status in order for changes to be reviewed before **Approval** depending on the change made.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	DepartmentName	Period
CO0000254	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Pretoria 1	-	09/12/2019	09/12/2024	Sales Department	60

MNU.112.003

