

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

CONTRACT

EDIT ITEM FEES

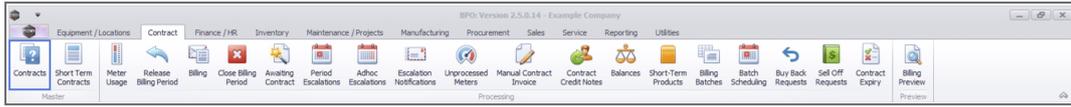
A contract **item fee** can be edited when the contract is in the **Active** state.

Certain amendments made to the contract **item fees**, will trigger the contract to be moved back to the Released state, in order for the contract to be checked and re-Approved. An email will then be sent to all users who have the rights to authorise this contract.

These are the changes involved that will trigger the re-Approval process:

- If any contract **Item Fee** is added or removed
- If the **Billing Customer** on an **Item Fee** or Item Meter is changed.
- If any of the following details are changed on contract **Item Fees**:
 - Amount
 - Start Date
 - End Date
 - Escalation %
 - Account Code
 - COS Account Code
 - Invoice Description
 - Billing Period
 - Billing Cycle
 - Finance Party
 - Finance Amount

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.

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractY	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Billing
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60	Months	Months		3
CO000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60	Months	Months		4
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60	Months	Months		5
CO000019	OPF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60	Months	Bi-annual		6
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con.	Roof	test	23/03/2016	23/03/2021	Sales Depart...	60	Months	Months		1
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60	Months	Months		1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60	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		7
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60	Months	Quarterly		5
CO000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60	Months	Months		3
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60	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		2
CO000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60	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		6
CO000077	PSH001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months		4
CO000078	PSH001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months		4
CO000080	OPF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60	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		7
CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	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		8

SELECT THE CONTRACT

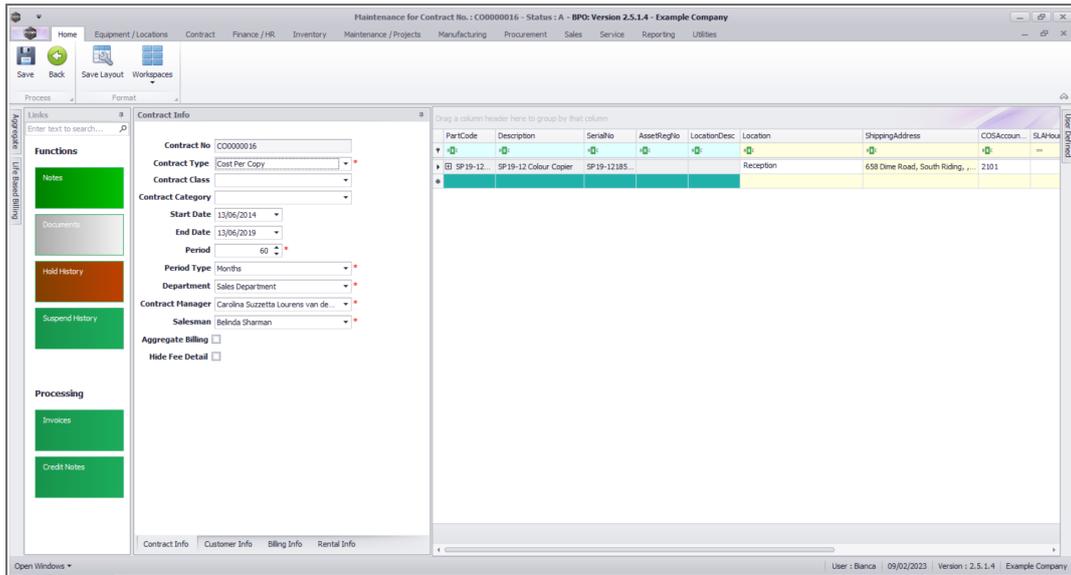
- Select the **row** of the **contract** that you wish to process.

ContractNo	CustomerC...	CustomerName	CustomerO...	ContractType	ContractY...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Billi...
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Deper...	60 Months	Months	Months	3	
CO000016	TTA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Deper...	60 Months	Months	Months	4	
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Deper...	60 Months	Months	Months	5	
CO000019	OPF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Deper...	60 Months	B-annual	Months	6	
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Deper...	60 Months	Months	Months	1	
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Deper...	60 Months	Months	Months	1	
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		07/09/2016	07/09/2021	Sales Deper...	60 Months	Months	Months	5	
CO000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Deper...	60 Months	Quarterly	Months	5	
CO000052	HCP001	Hope Works (Pty) Ltd		PRE	Prepaid Con.	Durban Area		26/05/2017	26/05/2022	Sales Deper...	60 Months	Months	Months	3	
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Deper...	60 Months	Months	Months	0	
CO000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Deper...	60 Months	Months	Months	2	
CO000073	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	26/05/2018	26/05/2023	Sales Deper...	60 Months	Months	Months	0	
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CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Deper...	60 Months	Months	Months	8	

- Click on the **Edit** button.

ContractNo	CustomerC...	CustomerName	CustomerO...	ContractType	ContractY...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Billi...
CO000012	TTA001	Titan Group		CPC	Cost Per Co.	Durban Area		16/05/2014	16/05/2019	Sales Deper...	60 Months	Months	Months	3	
CO000016	TTA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Deper...	60 Months	Months	Months	4	
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Durban Area		09/07/2014	09/07/2019	Sales Deper...	60 Months	Months	Months	5	
CO000019	OPF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Deper...	60 Months	B-annual	Months	6	
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Deper...	60 Months	Months	Months	1	
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Deper...	60 Months	Months	Months	5	
CO000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Deper...	60 Months	Quarterly	Months	5	
CO000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Deper...	60 Months	Months	Months	2	
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Deper...	60 Months	Months	Months	6	
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CO000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Deper...	60 Months	Months	Months	4	

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



SELECT THE ITEM

- Click on the **expand** button in the **row** of the **item** where you wish to edit the **item fee**.

Maintenance for Contract No.: CO000019 - Status: A - BPO: Version 2.1.0.46 - 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	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	T
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-10204			Reception	674 Nightwish Ave, Forest ...	2100	8.00	
	Stone Castle Shopping Centre				Stone Castl...	Stone Castle	674 Nightwish Ave, Forest ...	2100	8.00	

Links: Contract Info | Customer Info | Billing Info

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- The **Items** data grid will be expanded.
- The **Item Fees** frame usually opens first by default, if not, click on the **Item Fees** tab.

Maintenance for Contract No. : C0000019 - Status : A - BPO: Version 2.1.0.46 - 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	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	T																																																																																																																																															
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<table border="1"> <thead> <tr> <th>Item Fees</th> <th>Item Meters</th> <th>Item Inclusions</th> <th>Item Contacts</th> </tr> <tr> <th>Marked</th> <th>FeeType</th> <th>FeeTypeDesc</th> <th>ChargeAmount</th> <th>AccountCode</th> <th>COSAccountCode</th> <th>InvoiceDescription</th> <th>StartDate</th> <th>EndDate</th> <th>Period</th> <th>PeriodType</th> <th>BillingCycle</th> <th>BillingPeriod</th> <th>Escalatio</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>E</td> <td>Evergreen ...</td> <td>0.00</td> <td>1202</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td><input type="checkbox"/></td> <td>L</td> <td>Loan</td> <td>0.00</td> <td>1200</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>R</td> <td>Bank Rental</td> <td>800.00</td> <td>1204</td> <td>2204</td> <td>Rental Fee</td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>5</td> </tr> <tr> <td><input type="checkbox"/></td> <td>S</td> <td>Service</td> <td>0.00</td> <td>1101</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td><input type="checkbox"/></td> <td>I</td> <td>Inhouse Re...</td> <td>0.00</td> <td>1201</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td><input type="checkbox"/></td> <td>N</td> <td>Insurance</td> <td>0.00</td> <td>1203</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td><input type="checkbox"/></td> <td>REN</td> <td>Standard R...</td> <td>0.00</td> <td>1202</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td><input type="checkbox"/></td> <td>W</td> <td>Renew Fee</td> <td>0.00</td> <td>1101</td> <td></td> <td></td> <td>28 Jul 2014</td> <td>28 Jul 2019</td> <td>60</td> <td>Months</td> <td>Months</td> <td></td> <td>6</td> </tr> <tr> <td colspan="3"></td> <td>800.00</td> <td colspan="9"></td> </tr> </tbody> </table>											Item Fees	Item Meters	Item Inclusions	Item Contacts	Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Escalatio	<input type="checkbox"/>	E	Evergreen ...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6	<input type="checkbox"/>	L	Loan	0.00	1200			28 Jul 2014	28 Jul 2019	60	Months	Months		6	<input checked="" type="checkbox"/>	R	Bank Rental	800.00	1204	2204	Rental Fee	28 Jul 2014	28 Jul 2019	60	Months	Months		5	<input type="checkbox"/>	S	Service	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6	<input type="checkbox"/>	I	Inhouse Re...	0.00	1201			28 Jul 2014	28 Jul 2019	60	Months	Months		6	<input type="checkbox"/>	N	Insurance	0.00	1203			28 Jul 2014	28 Jul 2019	60	Months	Months		6	<input type="checkbox"/>	REN	Standard R...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6	<input type="checkbox"/>	W	Renew Fee	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6				800.00									
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SELECT THE ITEM FEE

- Select the **field** in the **row** of the specific **Item Fee** that you wish to change.
 - In this example, **Charge Amount** in the row of the **Bank Rental Fee** has been selected.

Item Fees	Item Meters	Item Inclusions	Item Contacts										
Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Escalatio
<input type="checkbox"/>	E	Evergreen ...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	L	Loan	0.00	1200			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input checked="" type="checkbox"/>	R	Bank Rental	800.00	1204	2204	Rental Fee	28 Jul 2014	28 Jul 2019	60	Months	Months		5
<input type="checkbox"/>	S	Service	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	I	Inhouse Re...	0.00	1201			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	N	Insurance	0.00	1203			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	REN	Standard R...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	W	Renew Fee	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
			800.00										

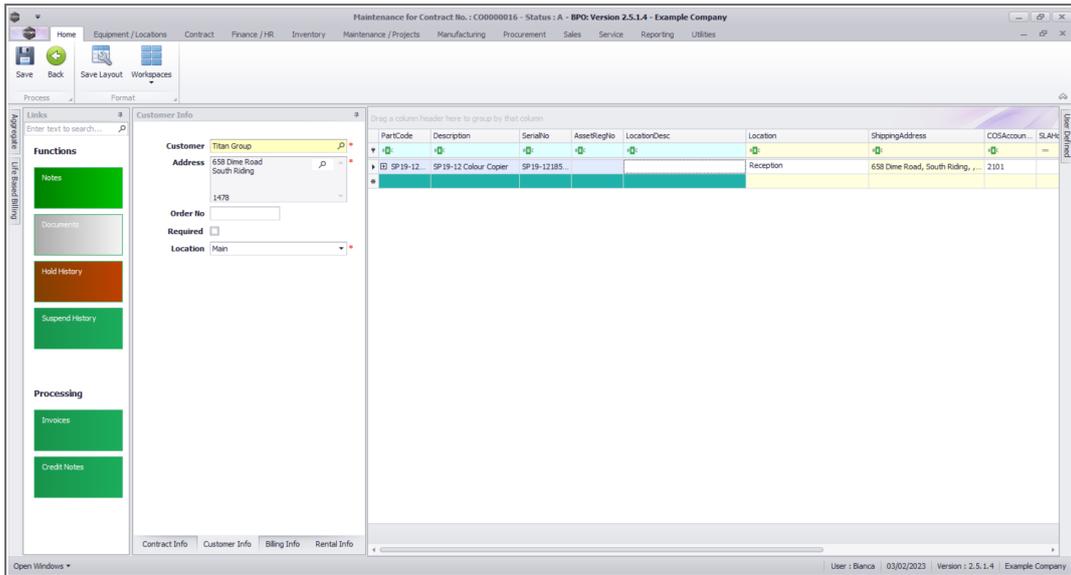
EDIT ITEM FEE

- **Type in** or use the **arrow indicators** to make the changes as required.
 - In this example, the Item Fee has been **increased** to **R950**.

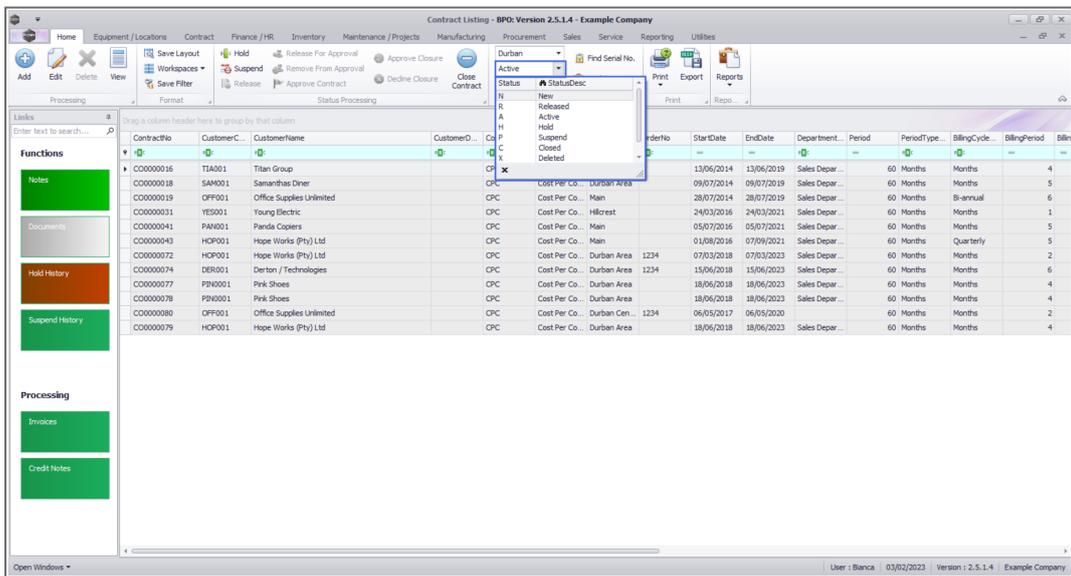
SAVE ITEM FEE CHANGES

SAVE THE CONTRACT

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

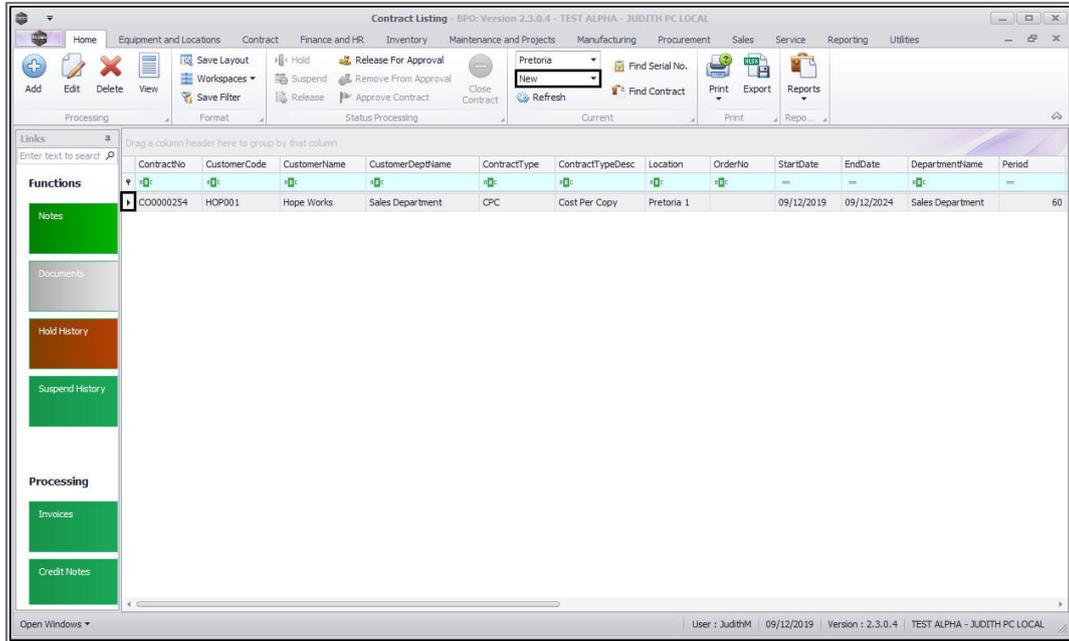


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **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.



MNU.112.038

