

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

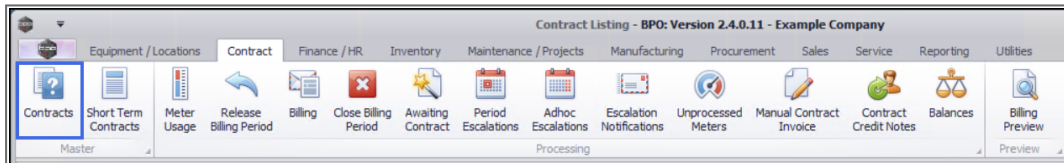
## CONTRACT

### VIEW A CONTRACT

The View Contract screen lists all the contract information for a selected contract, at a glance.

You will not be able to make any changes to the Contract information from the View screen.

**Ribbon Access:** Contract > Contracts



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

1. Click on the down arrow and change the **Site**, if required.
2. Click on the down arrow and change the **Status** if you want to view the details for Contracts other than **Active**.

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Co...	Hillcrest	1234	15/07/2020	17/07/2025	Sales Depart...	60 Months	
CO0000010	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	BPO_RST		05/01/2011	07/01/2016	Sales Depart...	60 Months	
CO0000012	TLA001	Titan Group		CPC	Cost Per Co...	Durban Area		16/05/2014	16/05/2019	Sales Depart...	60 Months	
CO0000016	TLA001	Titan Group		CPC	Cost Per Co...	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co...	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Con...	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	
CO0000042	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Main		07/09/2016	07/09/2021	Sales Depart...	60 Months	
CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	
CO0000044	BOT0001	Bothas Networking Inc		CPC	Cost Per Co...	Main		25/10/2016	25/10/2021	Sales Depart...	60 Months	
CO0000050	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		23/05/2017	23/05/2022	Sales Depart...	60 Months	
CO0000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	
CO0000053	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Cen...		26/07/2017	26/07/2022	Sales Depart...	60 Months	
CO0000071	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1144	07/03/2018	07/03/2023	Sales Depart...	60 Months	
CO0000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	
CO0000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	
CO0000078	PN0001	Pink Shoes		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2025	Sales Depart...	60 Months	
CO0000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	
CO0000049	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		16/05/2017	16/05/2022	Sales Depart...	60 Months	
CO0000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	
CO0000083	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		05/02/2020	05/02/2025	Sales Depart...	60 Months	
CO0000084	PN0001	Pink Shoes		CPC	Cost Per Co...	Hillcrest		09/03/2020	09/03/2027	Sales Depart...	60 Months	
CO0000085	BIG0001	Big Bargains		CPC	Cost Per Co...	Durban Area		16/04/2020	16/04/2025	Sales Depart...	60 Months	
CO0000086	BIG0001	Big Bargains		CPC	Cost Per Co...	Kloof		01/04/2020	27/04/2023	Sales Depart...	60 Months	
CO0000067	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1234	05/03/2018	05/03/2023	Sales Depart...	60 Months	

## SELECT CONTRACT TO VIEW

- Select the **row** of the contract you wish to view.
- Click on **View**.

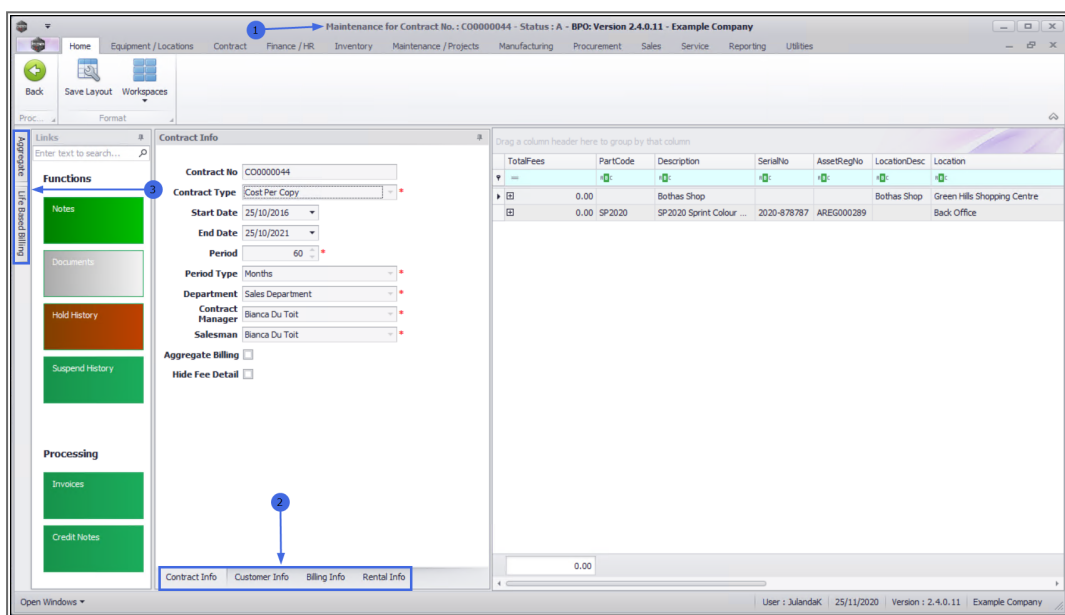
ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType
CO0000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Co...	Hillcrest	1234	15/07/2020	17/07/2025	Sales Depart...	60 Months	
CO0000010	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	BPO_RST		05/01/2011	07/01/2016	Sales Depart...	60 Months	
CO0000012	TLA001	Titan Group		CPC	Cost Per Co...	Durban Area		16/05/2014	16/05/2019	Sales Depart...	60 Months	
CO0000016	TLA001	Titan Group		CPC	Cost Per Co...	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co...	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Con...	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	
CO0000042	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Main		07/09/2016	07/09/2021	Sales Depart...	60 Months	
CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	
CO0000044	BOT0001	Bothas Networking Inc		CPC	Cost Per Co...	Main		25/10/2016	25/10/2021	Sales Depart...	60 Months	
CO0000050	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		23/05/2017	23/05/2022	Sales Depart...	60 Months	
CO0000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	
CO0000053	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Cen...		26/07/2017	26/07/2022	Sales Depart...	60 Months	
CO0000071	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1144	07/03/2018	07/03/2023	Sales Depart...	60 Months	
CO0000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	
CO0000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	
CO0000078	PN0001	Pink Shoes		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2025	Sales Depart...	60 Months	
CO0000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	
CO0000049	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		16/05/2017	16/05/2022	Sales Depart...	60 Months	
CO0000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	
CO0000083	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		05/02/2020	05/02/2025	Sales Depart...	60 Months	
CO0000084	PN0001	Pink Shoes		CPC	Cost Per Co...	Hillcrest		09/03/2020	09/03/2027	Sales Depart...	60 Months	
CO0000085	BIG0001	Big Bargains		CPC	Cost Per Co...	Durban Area		16/04/2020	16/04/2025	Sales Depart...	60 Months	
CO0000086	BIG0001	Big Bargains		CPC	Cost Per Co...	Kloof		01/04/2020	27/04/2023	Sales Depart...	60 Months	
CO0000067	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1234	05/03/2018	05/03/2023	Sales Depart...	60 Months	

1. The **Maintenance for Contract No. [ ]** screen will be displayed.

## CONTRACT INFORMATION TABS

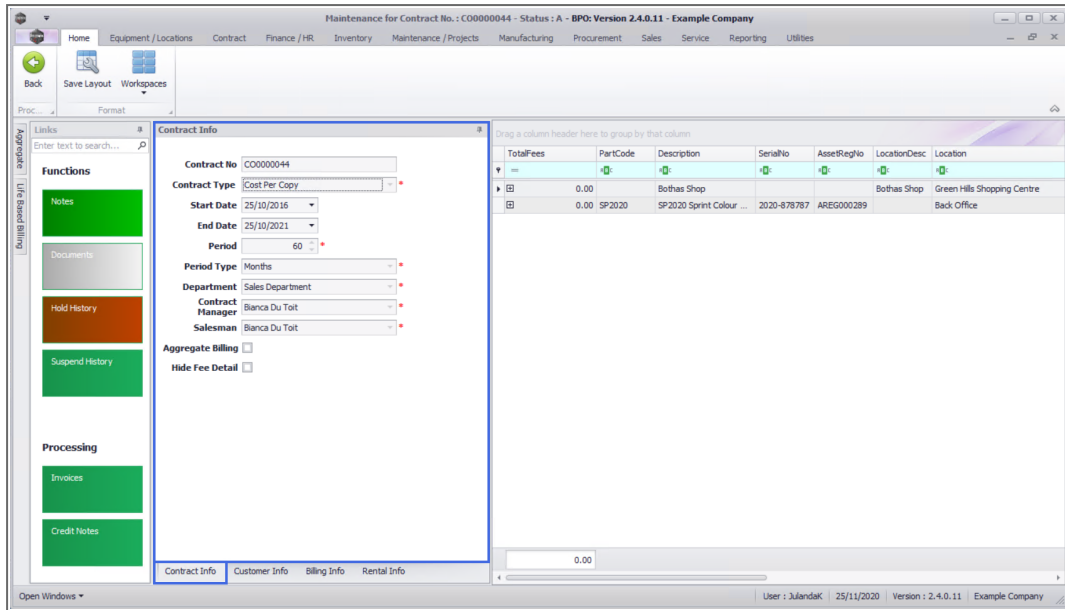
- The following tabs are usually docked to this screen by default: **Contract Info**, **Customer Info**, **Billing Info** and **Rental Info**. Click on a selected tab to bring it to the fore.
- The **Aggregate** and **Life Based Billing** tabs can be accessed by clicking on the relevant tab.

- Note:** You will not be able to edit or add any information in **View** mode.



## CONTRACT INFO

- The **Contract Info** panel will be displayed at the fore, by default, showing all the contract information for the selected contract.



**Maintenance for Contract No.: CO0000044 - Status: A - BPO: Version 2.4.0.11 - Example Company**

**Contract Info**

Contract No: CO0000044

Contract Type: Cost Per Copy

Start Date: 25/10/2016

End Date: 25/10/2021

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Bianca Du Toit

Salesman: Bianca Du Toit

Aggregate Billing: ☐

Hide Fee Detail: ☐

TotalFees	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
0.00		Bothas Shop			Bothas Shop	Green Hills Shopping Centre
0.00	SP2020	SP2020 Sprint Colour ...	2020-878787	AREG000289	Bothas Shop	Back Office

0.00

User: JulandaK | 25/11/2020 | Version: 2.4.0.11 | Example Company

## CUSTOMER INFO

- Click on the **Customer Info** tab.
- This frame will display the name, address and location of the customer linked to the selected contract. If you have an order number linked to the contract, then it will be displayed in the **Order Number** field.

Maintenance for Contract No.: C0000012 - Status: A

Home

Back Save Layout Workspaces

Proc... 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  
1478

Order No:

Required: ☐

Location: Durban Area

Drag a column header here to group by that column

TotalFees	PartCode	Description	SerialNo	AssetRegNo	Loc
=					
500.00	SP2020	SP2020 Sprint Colour ...	abc147a		
0.00	SP2020	SP2020 Sprint Colour ...	2020-102042		

500.00

Contract I... Customer I... Billing Info Rental Info

## BILLING INFO

- Click on the **Billing Info** tab.
- This frame displays the Billing Cycle, Billing Period and Billing Day for the Contract as well as the Escalation information, the Currency, Exchange, and Tax Rate.

Maintenance for Contract No. : C00000012 - Status : A

Home

Back Save Layout Workspaces

Proc... Format

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Billing Info

Billing Cycle: Months

Billing Period: 3

Billing Day: 25

Escalation Type: Percentage

Escalation Period: 5

Escalation Amt: 5.00

Currency: South African Rand

Exchange: 1.00

Tax Rate: 15.00

TotalFees	PartCode	Description	SerialNo	AssetRegNo	Loc
500.00	SP2020	SP2020 Sprint Colour ...	abc147a		
0.00	SP2020	SP2020 Sprint Colour ...	2020-102042		

500.00

Contract I... Customer I... Billing Info Rental Info

## RENTAL INFO

- Click on the **Rental Info**.
- This frame will display all the Rental Information linked to the selected contract, if applicable.

Maintenance for Contract No.: C0000012 - Status: A

Home

Back Save Layout Workspaces

Proc... Format...

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Rental Info

Order No

Order Value 0

Contract Value 5000

Period Type Months

Rent Period 60

Interest Method Fixed

Interest Rate 15

Int. Variance 0

Computed Rental 118.9496

Rental Factor 0.024

Computed Rental 2 120

Applied Rental 120

Note

TotalFees	PartCode	Description	SerialNo	AssetRegNo	Loc
500.00	SP2020	SP2020 Sprint Colour ...	abc147a		
0.00	SP2020	SP2020 Sprint Colour ...	2020-102042		

500.00

Contract I... Customer I... Billing Info Rental Info

## LIFE BASED BILLING INFO

- Click on the **Life Based Billing** tab.
- The **Life Based Billing** frame will display information related to Life Based Billing for the selected contract, if applicable.

Maintenance for Contract No. : C00000012 - Status : A

Home

Back Save Layout Workspaces

Proc... Format

**Life Based Billing**

The life based billing details must be captured on this screen. The expiry date and the usage values related to the life based/pre-paid details must be captured. Specify whether charges still apply with a rebate during the life based/pre-paid period.

Marked	MeterCode	Description	StartDate	EndDate	Inc
<input type="checkbox"/>	Mono	Mono meter			
<input type="checkbox"/>	Colour	Colour Meter			
<input type="checkbox"/>	MonoA3	Mono A3			
<input type="checkbox"/>	ColourA3	Colour A3			
<input type="checkbox"/>	ACCYC	AC Cycles			
<input type="checkbox"/>	ClearA3	Clear A3			
<input type="checkbox"/>	MCONMETE...	MCONMETE...			
<input type="checkbox"/>	MCONASSETS	MCONASSETS			

Drag a column header here to group by that column

TotalFees	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Loc
500.00	SP2020	SP2020 Sprint Colour ...	abc147a			Rec
0.00	SP2020	SP2020 Sprint Colour ...	2020-102042			Test

Open Windows

User : JulandaK | 27/11/2020 | Version : 2.4.0.11 | Example Company

- You can choose to **dock** or **undock** the **Life Based Billing** frame by clicking on the **pin** icon. Docking the frame, will place it over the **Contract Information** frame as displayed in the example.
- Close the screen by clicking on the **Close** button.

Maintenance for Contract No. : C00000012 - Status : A

Home

Back Save Layout Workspaces

Proc... Format

Links

Enter text to search...

**Functions**

Notes

Documents

Hold History

Suspend History

**Processing**

Invoices

**Life Based Billing**

The life based billing details must be captured on this screen. The expiry date and the usage values related to the life based/pre-paid details must be captured. Specify whether

Marked	MeterCode	Description	StartDate	EndDate	Inc
<input type="checkbox"/>	Mono	Mono meter			
<input type="checkbox"/>	Colour	Colour Meter			
<input type="checkbox"/>	MonoA3	Mono A3			
<input type="checkbox"/>	ColourA3	Colour A3			
<input type="checkbox"/>	ACCYC	AC Cycles			
<input type="checkbox"/>	ClearA3	Clear A3			
<input type="checkbox"/>	MCONMETE...	MCONMETE...			
<input type="checkbox"/>	MCONASSETS	MCONASSETS			

Drag a column header here to group by that column

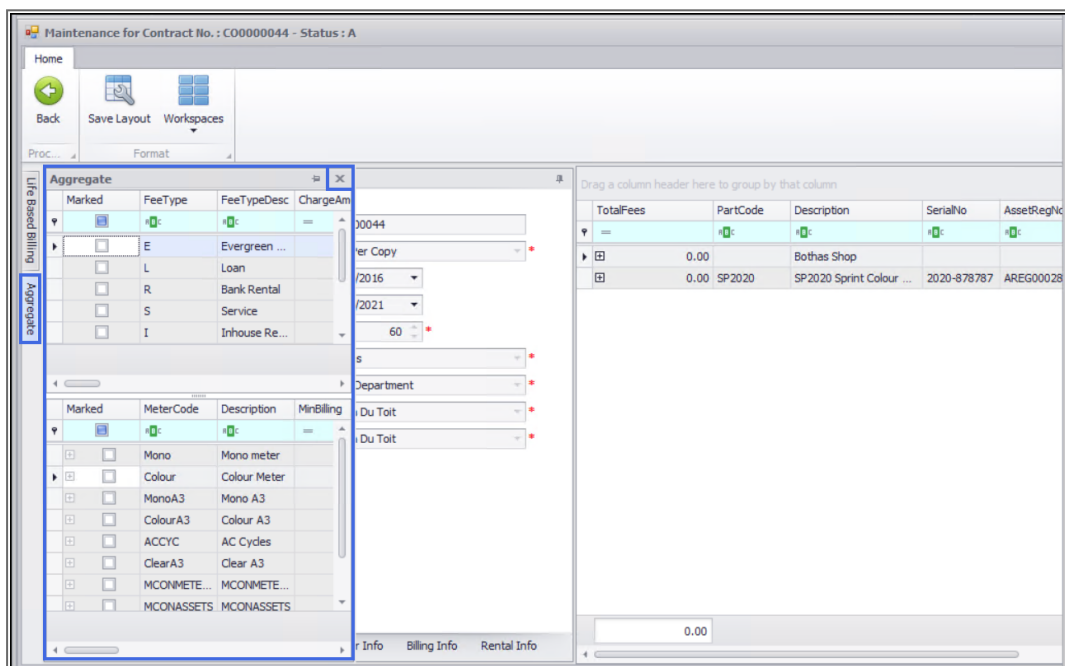
TotalFees	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Loc
500.00	SP2020	SP2020 Sprint Colour ...	abc147a			Rec
0.00	SP2020	SP2020 Sprint Colour ...	2020-102042			Test

Open Windows

User : JulandaK | 27/11/2020 | Version : 2.4.0.11 | Example Company

## AGGREGATE INFO

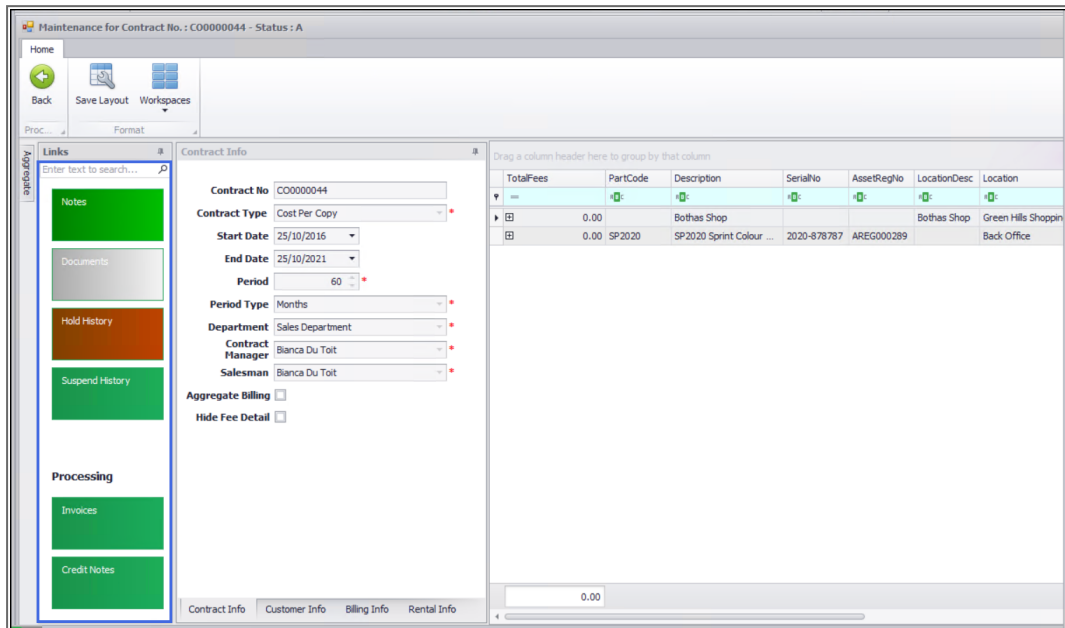
- Click on the **Aggregate** tab.
- The **Aggregate** frame will display aggregate billing information for the selected contract, if applicable.
- You can choose to **dock** or **undock** the **Aggregate** frame by clicking on the **pin** icon. Docking the frame, will place it over the **Contract Information** frame as explained above, with the Life Based Billing frame.
- **Close** the Aggregate frame when you have viewed it.



## THE LINKS PANEL

The **Links** panel contains Contract **Functions** tiles, which will direct you to further information regarding the selected contract.

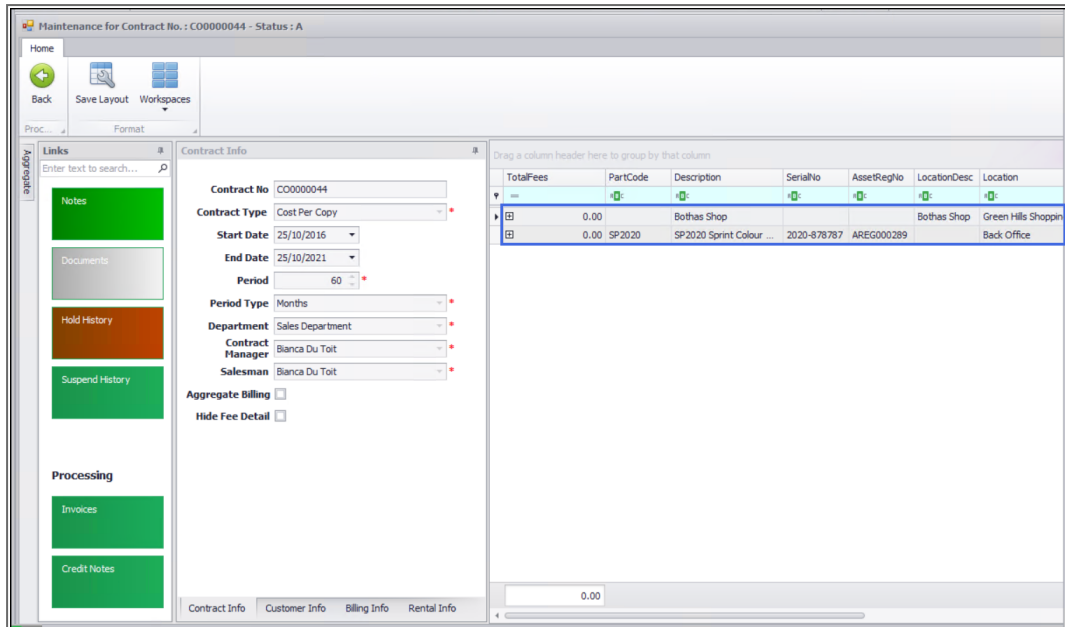
- Click on any tile you wish to view information for.
- The screen for the selected tile will display the relevant information.



TotalFees	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
0.00		Bothas Shop			Bothas Shop	Green Hills Shopping
0.00	SP2020	SP2020 Sprint Colour ...	2020-878787	AREG000289		Back Office

## CONTRACT PARTS FRAME

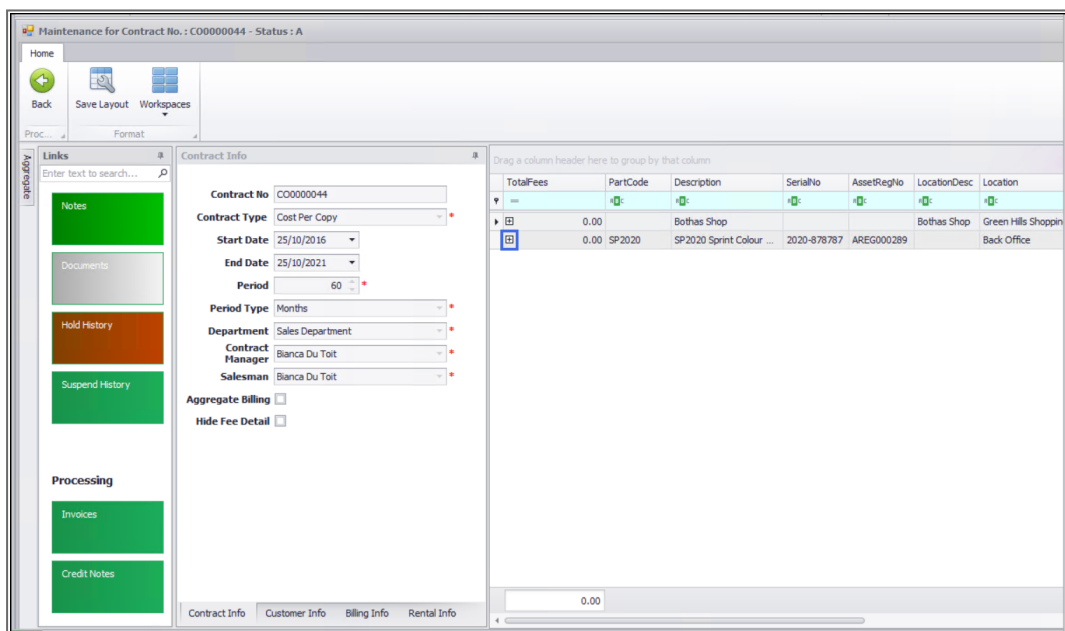
The Contract **Parts** information frame, displays all the **items** and **accessories** linked to the selected contract.



TotalFees	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
0.00		Bothas Shop			Bothas Shop	Green Hills Shopping
0.00	SP2020	SP2020 Sprint Colour ...	2020-878787	AREG000289	Back Office	Back Office

## CONTRACT ITEMS FRAME

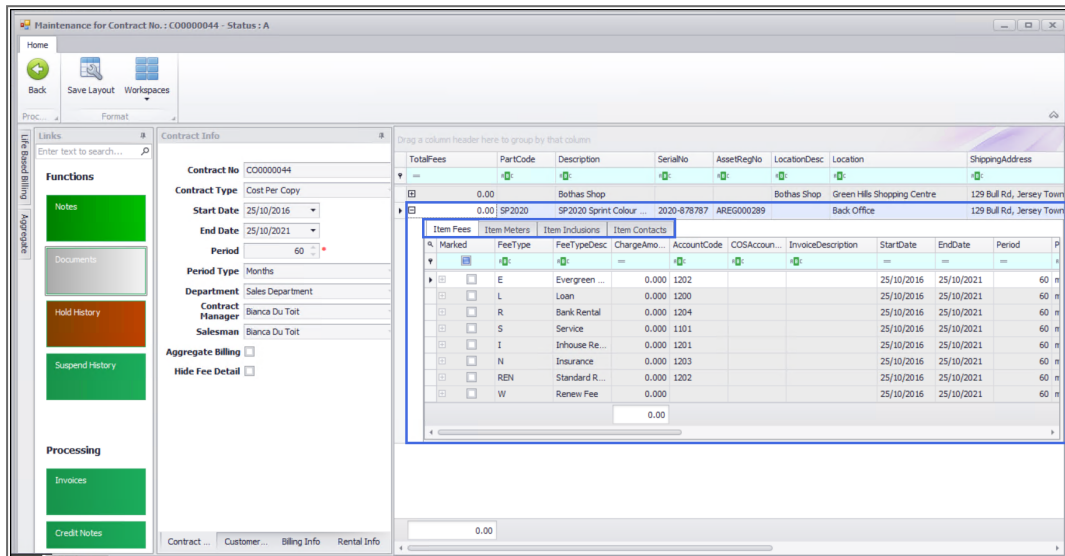
In the **Parts** frame, click on the **expand** button of the part/item where you wish to view more details.



TotalFees	PartCode	Description	SerialNo	AssetRegNo	LocationDesc	Location
0.00		Bothas Shop			Bothas Shop	Green Hills Shopping
0.00	SP2020	SP2020 Sprint Colour ...	2020-878787	AREG000289	Back Office	Back Office

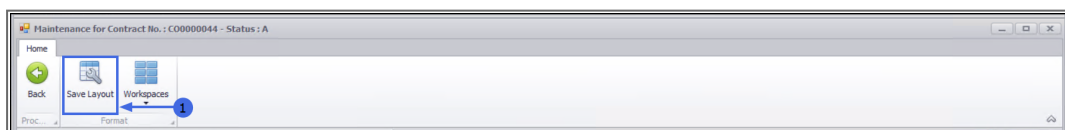
The sub grid will be expanded and you can now view the **Items** frame.

- The **Item Fees** data grid will be at the fore by default.
- You can switch between **Item Fees**, **Item Meters**, **Item Inclusions**, or **Item Contracts**, by clicking on the tab you wish to view.
  - **Note:** You can collapse (to view less details) by clicking on the **Expand / Collapse** button.



## SAVE LAYOUT

1. If you had changed the **Maintenance for Contract** window, by docking and / or undocking any of the information tabs and wish to keep the settings, click on **Save Layout** to save the display format. This will ensure that your preferred settings for the **Contract View**, will be the same when you view the next contract.



2. To return to the **Contract Listing** screen, click on **Back**.



MNU.112.051

