

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

## SERVICE

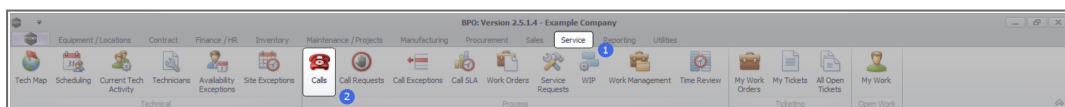
### CALLS – FOR CONTRACT

**Note** that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility<sup>1</sup>. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

The Items Awaiting Contract for Call screen displays items linked to the selected call that have been processed but still need to be linked to a new or existing contract. The items displayed can be:

- ✓ A or B-class **internal assets** issued (**New Deal Rental**)
- ✓ A or B-class **serialised stock** invoiced and issued (**New Deal Sale**)

**Ribbon Select Service > Calls**



- The **Call Listing** screen will be displayed.

---

<sup>1</sup>BPO2 v2.5.1.3 or higher

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	09:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Sawmills Owner	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	BP02 TEST 1	3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Refurbish Contract	NR	New Deal Rental					3
IB CH0000992	Top Inkbox Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contract Closure - C00000594	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT3000000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	18/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2022 Version : 2.5.1.4 Example Company

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

Call Listing - RPD Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
IB CH0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ann Hilson	09:09:10	Test account balances	CR	Change Request			107		3
IB CH0001002	Sawmills Owner	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual	SR	Select Call Type			09-12/1202		3
IB CH0001001	Young Electric	26/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123	BP02 TEST 1	3
IB CH0000996	Hope Works (Pty) Ltd	21/10/2022	Unassigned		11:10:11	Refurbish Contract	NR	New Deal Rental					3
IB CH0000992	Top Inkbox Hire	20/10/2022	Awaiting Acceptance	Daniel Balgovan	14:05:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
IB CH0000991	Askle Judd Inc	24/10/2022	Unassigned		05:38:15	Contract Closure - C00000594	SR	Select Call Type					3
IB CH0000989	Denton / Technologies	13/06/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
IB CH0000988	Young Electric	13/06/2022	Unassigned		08:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
IB CH0000987	Young Electric	06/06/2022	Unassigned		06:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
IB CH0000986	Young Electric	07/06/2022	Unassigned		06:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
IB CH0000985	Hope Works (Pty) Ltd	13/06/2022	Unassigned		06:00:13	Test future call - for elapsed time	UPG	Upgrade			20-48765		3
IB CH0000984	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT3000000		3
IB CH0000983	Hope Works (Pty) Ltd	08/06/2022	Unassigned		06:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN23415546		3
IB CH0000982	Young Electric	18/06/2022	Unassigned		06:00:30	Test elapsed hours 1	TEST	Testing			an123		3
IB CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with site manager email entered	ACH	Administration			107		3
IB CH0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	06:30:20	test another call email	ACH	Administration			09501015		3
IB CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			09501015		3
IB CH0000971	Westwood Dynamic	20/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2
IB CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000964	Hack P.C. IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			147807		2
IB CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			18-30000		2
IB CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorHart - Bathroom Bin Maintenance	SR	Scheduled Maintenance				Checkers Centre - Hilbert	2
IB CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
IB CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SR	Scheduled Maintenance			NEW1234		2

Count: 386

User : Bianca 30/03/2022 Version : 2.5.1.4 Example Company

- Select the **Call** you wish to work with.

Call Listing - BPO Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilborn	09:09:10	Test account balance	CR	Change Request			an123		3
BI CH0001002	Silverdale Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balance manual	SR	Select Call Type			an123		3
BI CH0001001	Young Electric	29/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BI CH0000999	Top Value Hire	25/10/2022	Unassigned		14:08:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
BI CH0000991	Apple Juice Inc	24/09/2022	Unassigned		09:36:15	Contact Closure - C00000059	SR	Select Call Type					3
BI CH0000989	Derton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	01/04/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/04/2022	Unassigned		09:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/04/2022	Unassigned		09:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	10/04/2022	Unassigned		15:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
BI CH0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		09:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		09:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN02413546		3
BI CH0000982	Young Electric	18/04/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095019151		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095019151		3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

- Click on the **Edit** button.

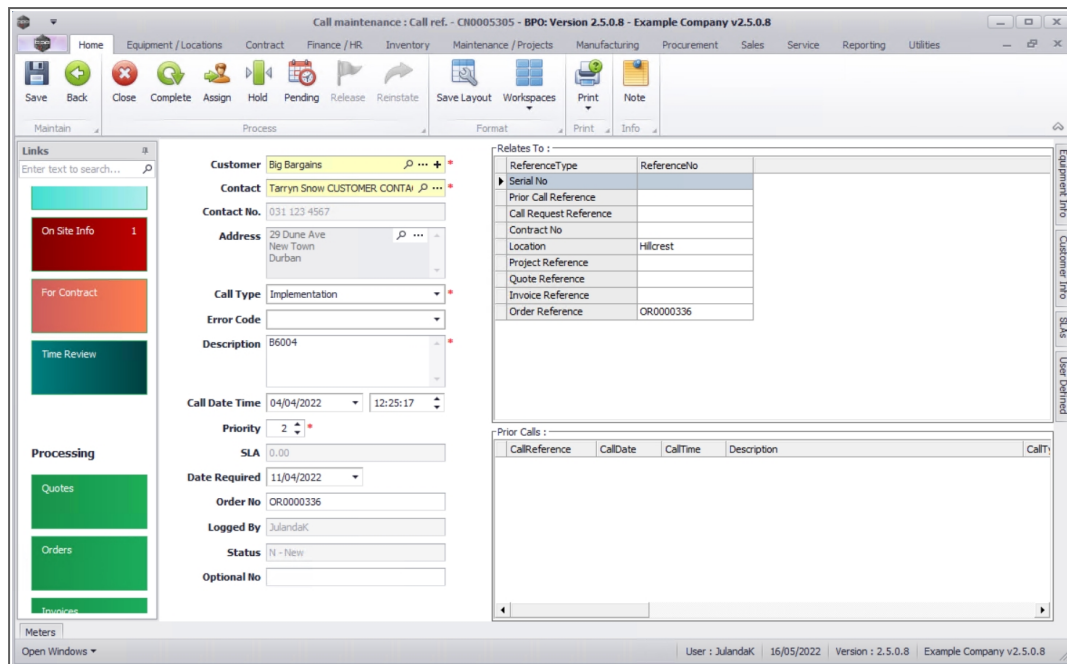
Call Listing - BPO Version 2.5.1.4 - Example Company

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BI CH0001003	Young Electric	12/12/2022	Awaiting Acceptance	Ann Hilborn	09:09:10	Test account balance	CR	Change Request			an123		3
BI CH0001002	Silverdale Drive	12/12/2022	Awaiting Acceptance	Nery Thompson	08:38:20	Test call for account balance manual	SR	Select Call Type			an123		3
BI CH0001001	Young Electric	29/11/2022	Unassigned		11:26:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BI CH0000999	Top Value Hire	25/10/2022	Awaiting Acceptance	Daniel Balgoveen	14:08:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP1234OLD		3
BI CH0000991	Apple Juice Inc	24/09/2022	Unassigned		09:36:15	Contact Closure - C00000059	SR	Select Call Type					3
BI CH0000989	Derton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
BI CH0000988	Young Electric	01/04/2022	Unassigned		09:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	an123		3
BI CH0000987	Young Electric	06/04/2022	Unassigned		09:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			an123		3
BI CH0000986	Young Electric	07/04/2022	Unassigned		09:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			an123		3
BI CH0000985	Hope Works (Pty) Ltd	10/04/2022	Unassigned		15:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		3
BI CH0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		09:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47300000		3
BI CH0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		09:08:31	Test elapsed time 2 - day prior	TEST	Testing			SN02413546		3
BI CH0000982	Young Electric	18/04/2022	Unassigned		06:00:35	Test elapsed hours 1	TEST	Testing			an123		3
BI CH0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BI CH0000974	Hope Works (Pty) Ltd	30/11/2019	Awaiting Acceptance	Bianca Du Toit	06:36:20	Test another call email	ADM	Administration			095019151		3
BI CH0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095019151		3
BI CH0000971	Westwood Dynamic	29/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000970	Westwood Dynamic	22/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BI CH0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000964	Hack PC - IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BI CH0000963	Westwood Dynamic	25/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BI CH0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	SubfloorMent - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilbert	2
BI CH0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INVT	Installation				Forest Hills Centre	2
BI CH0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

Count: 306

User : Bianca 30/03/2023 Version : 2.5.1.4 Example Company

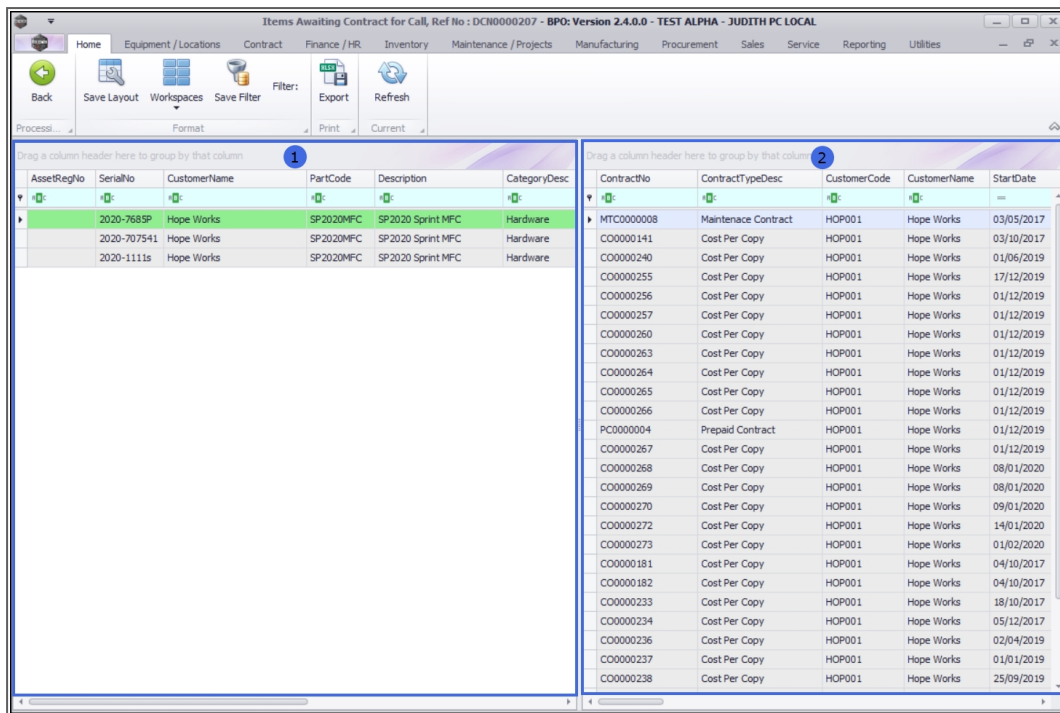
- The **Call Maintenance** screen will be displayed.
- Click on the **For Contract** tile.



## FOR CONTRACT

- The **Items Awaiting Contract for Call [ ]** screen will be displayed.
- The screen is divided into **2** data grids.
  - **Data grid 1:** displays all the items linked to the selected call **waiting** to be allocated to a contract. These items can either be **client** assets or **internal** assets. For internal assets to be displayed, a **New Deal Rental** process has to be completed first.
  - **Data grid 2:** displays all the existing contracts for the **customer** linked to the call.
    - **Note:** Deleted or closed contracts will not be displayed in this data grid.





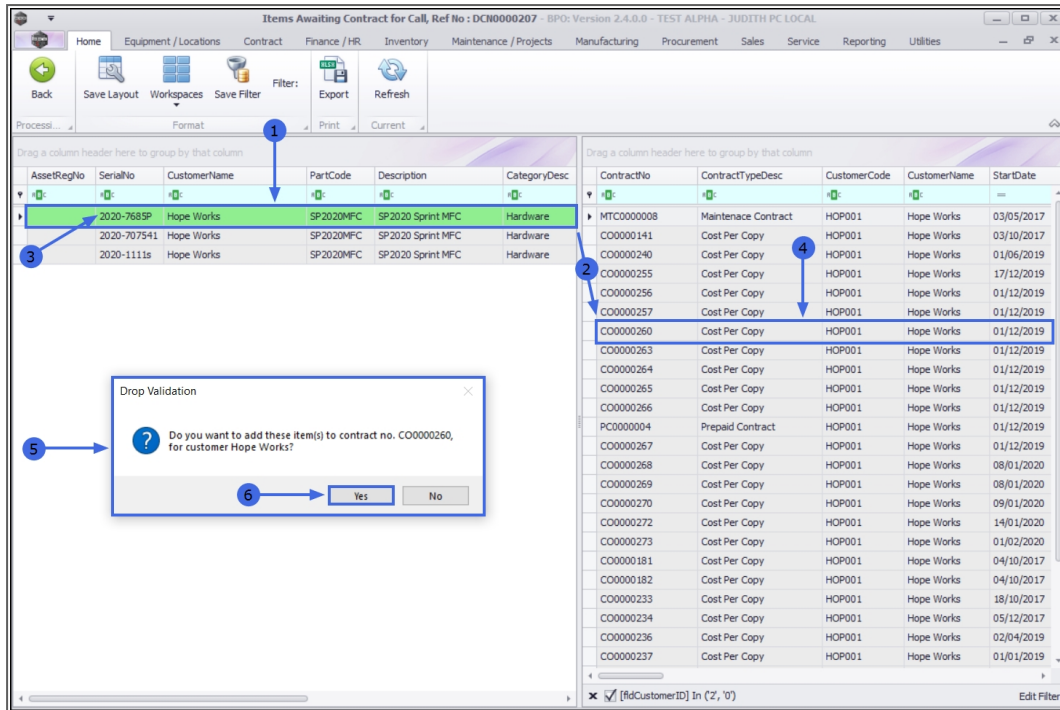
AssetRegNo	SerialNo	CustomerName	PartCode	Description	CategoryDesc
2020-7685P	Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware	
2020-707541	Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware	
2020-1111s	Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware	

ContractNo	ContractTypeDesc	CustomerCode	CustomerName	StartDate
MT00000008	Maintenance Contract	HOP001	Hope Works	03/05/2017
CO0000141	Cost Per Copy	HOP001	Hope Works	03/10/2017
CO0000240	Cost Per Copy	HOP001	Hope Works	01/06/2019
CO0000255	Cost Per Copy	HOP001	Hope Works	17/12/2019
CO0000256	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000257	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000260	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000263	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000264	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000265	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000266	Cost Per Copy	HOP001	Hope Works	01/12/2019
PC0000004	Prepaid Contract	HOP001	Hope Works	01/12/2019
CO0000267	Cost Per Copy	HOP001	Hope Works	01/12/2019
CO0000268	Cost Per Copy	HOP001	Hope Works	08/01/2020
CO0000269	Cost Per Copy	HOP001	Hope Works	08/01/2020
CO0000270	Cost Per Copy	HOP001	Hope Works	09/01/2020
CO0000272	Cost Per Copy	HOP001	Hope Works	14/01/2020
CO0000273	Cost Per Copy	HOP001	Hope Works	01/02/2020
CO0000181	Cost Per Copy	HOP001	Hope Works	04/10/2017
CO0000182	Cost Per Copy	HOP001	Hope Works	04/10/2017
CO0000233	Cost Per Copy	HOP001	Hope Works	18/10/2017
CO0000234	Cost Per Copy	HOP001	Hope Works	05/12/2017
CO0000236	Cost Per Copy	HOP001	Hope Works	02/04/2019
CO0000237	Cost Per Copy	HOP001	Hope Works	01/01/2019
CO0000238	Cost Per Copy	HOP001	Hope Works	25/09/2019

## LINK A SINGLE ITEM TO AN EXISTING CONTRACT

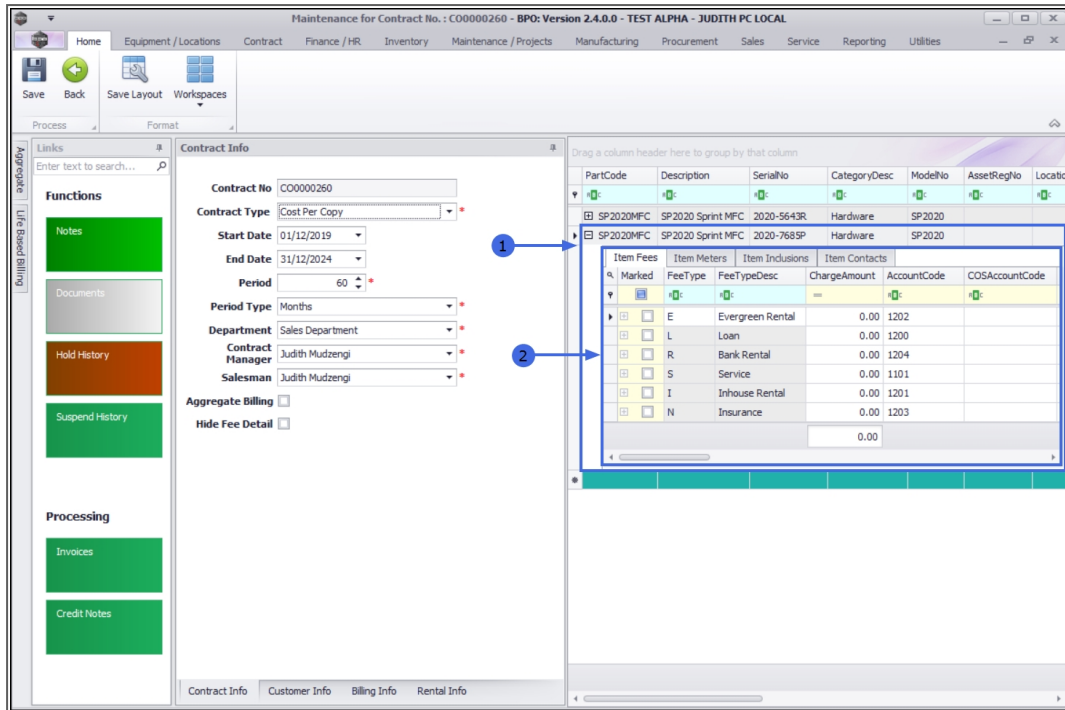
- **Click** and **hold** on the contract item in data grid **1**, that you wish to add to an existing contract.
- **Drag** the contract item to an existing contract displayed in data grid **2**.
- In this image, serial no. **2020-7685P** has been selected, and will be dragged and dropped onto
- Contract no. **CO0000260**.
- As it is 'dropped', a **Drop Validation** message box will pop up asking;
  - Do you want to add these items(s) to contract no. [ ], for customer [ ]?
- Click on **Yes**.



The screenshot shows the 'Items Awaiting Contract for Call' screen. The interface includes a top navigation bar with tabs like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with buttons for Back, Save Layout, Workspaces, Save Filter, Filter, Export, and Refresh. The main area contains two data grids. The left grid has columns: AssetRegNo, SerialNo, CustomerName, PartCode, Description, and CategoryDesc. The right grid has columns: ContractNo, ContractTypeDesc, CustomerCode, CustomerName, and StartDate. A 'Drop Validation' dialog box is open, asking: 'Do you want to add these item(s) to contract no. CO0000260, for customer Hope Works?'. The dialog has 'Yes' and 'No' buttons. Numbered annotations (1-6) point to specific elements: 1 points to the 'Filter' button, 2 points to the 'ContractNo' column header, 3 points to the 'AssetRegNo' column header, 4 points to the 'ContractTypeDesc' column header, 5 points to the question mark icon in the dialog, and 6 points to the 'Yes' button.

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

- The contract item you have added will be listed last in the **Parts** data grid.
- The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
  - **Items Fees**
  - **Item Meters**
  - **Item Inclusions**
  - **Items Contacts**



Contract Info

Contract No: C00000260

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☐

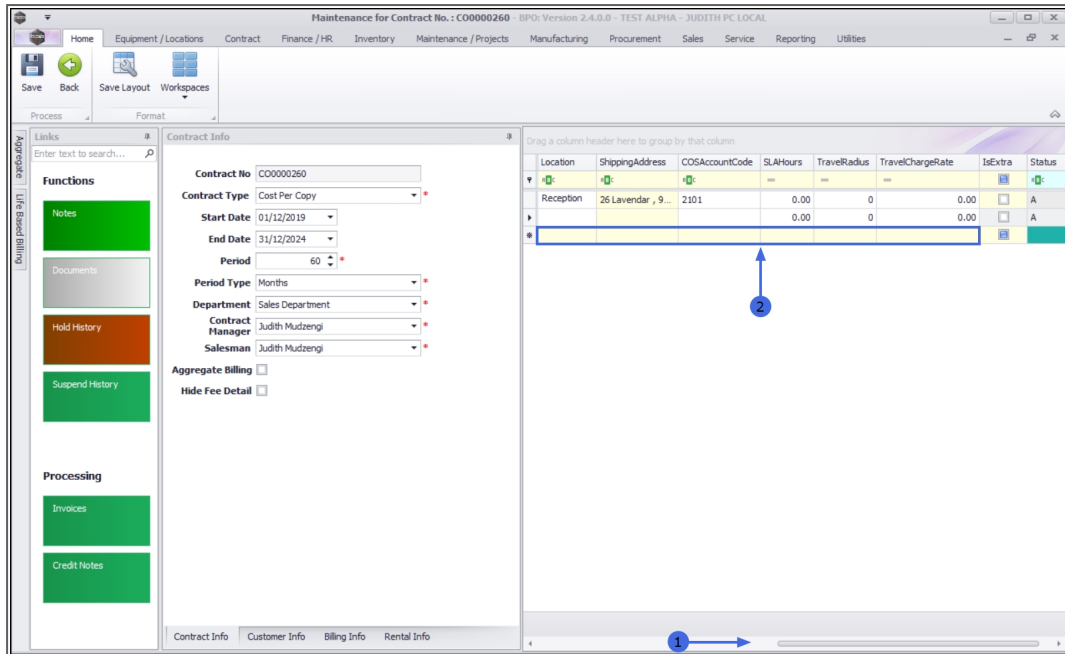
Hide Fee Detail: ☐

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	Location
SP2020MFC	SP2020 Sprint MFC	2020-5643R	Hardware	SP2020		
SP2020MFC	SP2020 Sprint MFC	2020-768SP	Hardware	SP2020		

Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode
Marked	FeeType	FeeTypeDesc	ChargeAmount		
	E	Evergreen Rental	0.00	1202	
	L	Loan	0.00	1200	
	R	Bank Rental	0.00	1204	
	S	Service	0.00	1101	
	I	Inhouse Rental	0.00	1201	
	N	Insurance	0.00	1203	
			0.00		

In this screen,

- Scroll right to view all the contract item information.
- You can update /edit the following fields:
  - Link a **Location**
  - Link a **Shipping Address**
  - Link a **COS Account Code**
  - Link a **SLA Hours**
  - Link a **Travel Radius**
  - Link a **Travel Charge**



Contract Info

Contract No: CO0000260

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

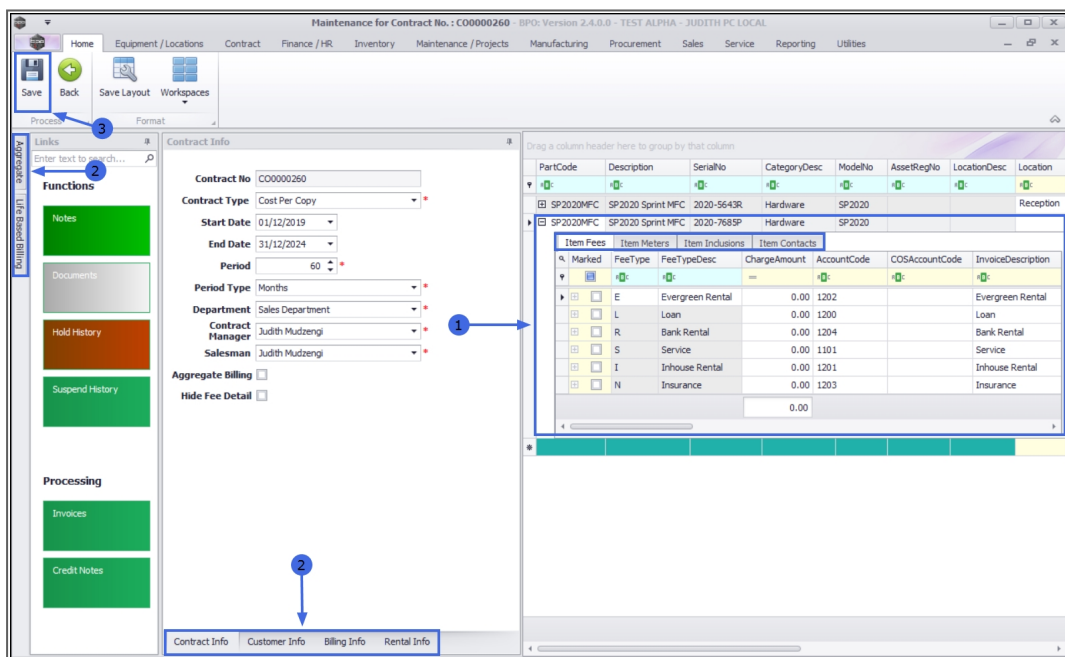
Salesman: Judith Mudzengi

Aggregate Billing: ☐

Hide Fee Detail: ☐

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
Reception	26 Lavendar , 9	2101	0.00	0	0.00	<input type="checkbox"/>	A
			0.00	0	0.00	<input type="checkbox"/>	A

- You can input relevant data for the **Part Item frames**.
- Leave the **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** as is.
- Click on **Save**.



Contract Info

Contract No: CO0000260

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☐

Hide Fee Detail: ☐

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
SP 2020MPC	SP 2020 Sprint MFC	2020-5643R	Hardware	SP 2020			Reception
SP 2020MPC	SP 2020 Sprint MFC	2020-7685P	Hardware	SP 2020			

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAmount
<input type="checkbox"/>	E	Evergreen Rental	0.00
<input type="checkbox"/>	L	Loan	0.00
<input type="checkbox"/>	R	Bank Rental	0.00
<input type="checkbox"/>	S	Service	0.00
<input type="checkbox"/>	I	Inhouse Rental	0.00
<input type="checkbox"/>	N	Insurance	0.00

- The item will be linked to the **existing** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract for Call** listing screen.

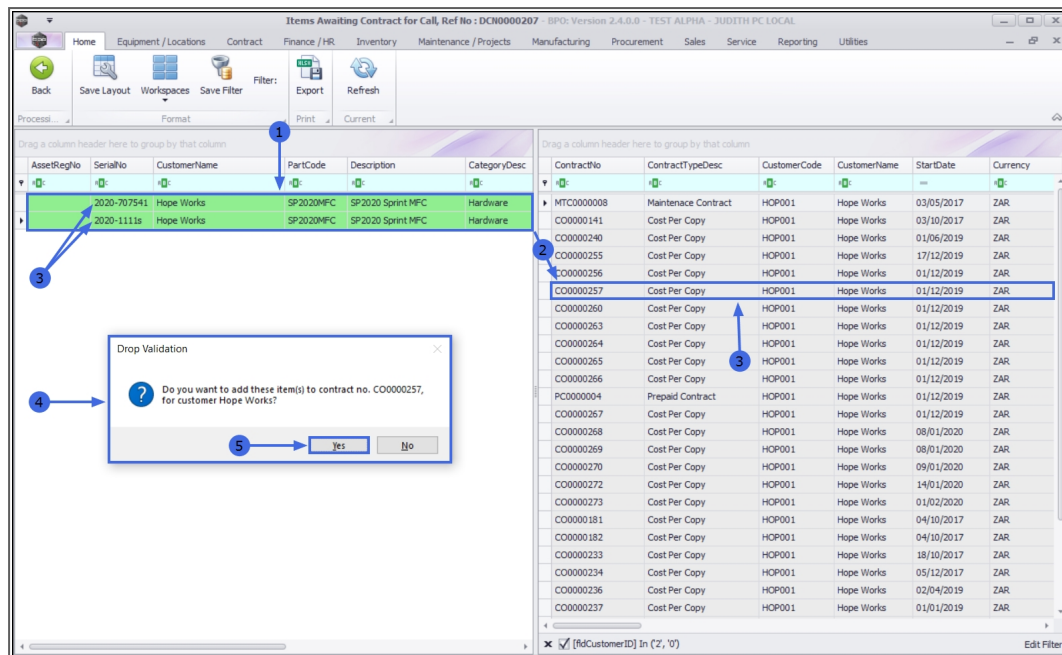
## **LINK MULTIPLE ITEMS TO AN EXISTING CONTRACT**

---

- In the **Items Awaiting Contract for Call** screen, select the multiple items in data grid **1** that you wish to be linked to an existing contract.

In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

- **Drag** the items to an existing contract in data grid 2.
- In this image, serial no **2020-707541** and **2020-1111s** have been selected, dragged and dropped on to contract no **CO0000257**.
- A **Drop Validation** message box will pop up asking;
  - **Do you want to add these items(s) to contract no. [ ] for customer [ ]?**
- Click on **Yes**.



Items Awaiting Contract for Call, Ref No : DCN0000207 BPO: Version 2.4.0.0 - TEST ALPHA - JUDITH PC LOCAL

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

Back Save Layout Workspaces Save Filter Filter: Export Refresh

Process: Format Print Current

Drag a column header here to group by that column

AssetRegNo	SerialNo	CustomerName	PartCode	Description	CategoryDesc
2020-707541		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-1111s		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware

Drag a column header here to group by that column

ContractNo	ContractTypeDesc	CustomerCode	CustomerName	StartDate	Currency
MT00000008	Maintenance Contract	HOP001	Hope Works	03/05/2017	ZAR
CO0000141	Cost Per Copy	HOP001	Hope Works	03/10/2017	ZAR
CO0000240	Cost Per Copy	HOP001	Hope Works	01/06/2019	ZAR
CO0000255	Cost Per Copy	HOP001	Hope Works	17/12/2019	ZAR
CO0000256	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000257	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000260	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000263	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000264	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000265	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000266	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
PC00000004	Prepaid Contract	HOP001	Hope Works	01/12/2019	ZAR
CO0000267	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000268	Cost Per Copy	HOP001	Hope Works	08/01/2020	ZAR
CO0000269	Cost Per Copy	HOP001	Hope Works	08/01/2020	ZAR
CO0000270	Cost Per Copy	HOP001	Hope Works	09/01/2020	ZAR
CO0000272	Cost Per Copy	HOP001	Hope Works	14/01/2020	ZAR
CO0000273	Cost Per Copy	HOP001	Hope Works	01/02/2020	ZAR
CO0000181	Cost Per Copy	HOP001	Hope Works	04/10/2017	ZAR
CO0000182	Cost Per Copy	HOP001	Hope Works	04/10/2017	ZAR
CO0000233	Cost Per Copy	HOP001	Hope Works	18/10/2017	ZAR
CO0000234	Cost Per Copy	HOP001	Hope Works	05/12/2017	ZAR
CO0000236	Cost Per Copy	HOP001	Hope Works	02/04/2019	ZAR
CO0000237	Cost Per Copy	HOP001	Hope Works	01/01/2019	ZAR

Drop Validation

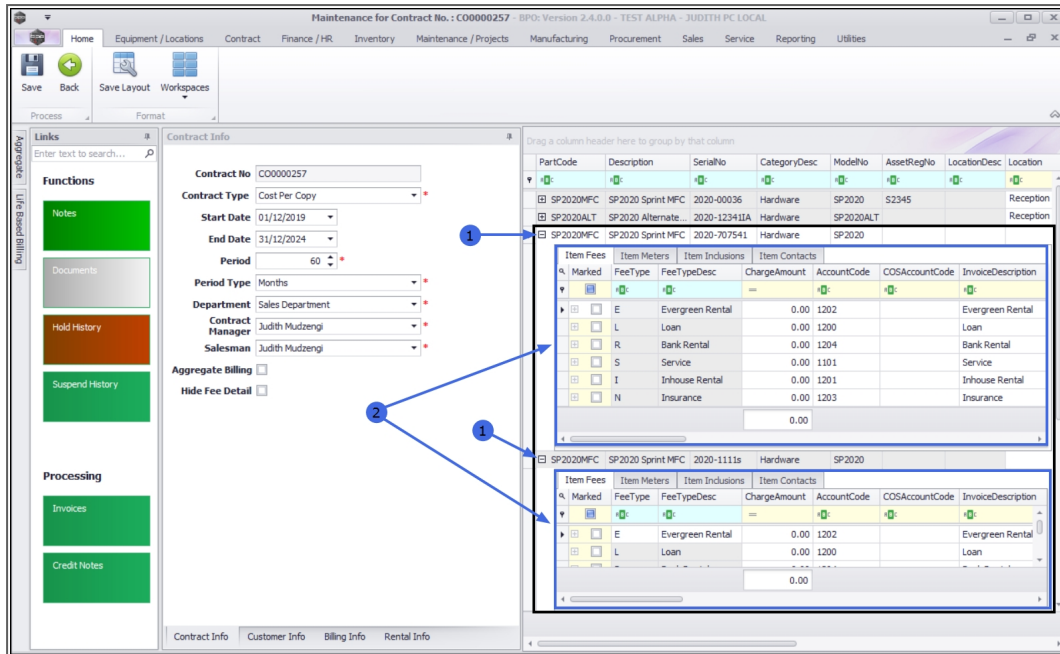
Do you want to add these item(s) to contract no. CO0000257, for customer Hope Works?

Yes No

✖ [!idCustomerID] In ('Z', 'O') Edit Filter

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

- The items you are adding to the contract will be listed last in the **Parts** data grid.
- The **Items sub grids** linked to these parts will be auto expanded and displayed ready for adding information:
  - **Items Fees**
  - **Item Meters**
  - **Item Inclusions**
  - **Items Contacts**



**Contract Info**

Contract No: C00000257

Contract Type: Cost Per Copy

Start Date: 01/12/2019

End Date: 31/12/2024

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Judith Mudzengi

Salesman: Judith Mudzengi

Aggregate Billing: ☐

Hide Fee Detail: ☐

**Contract Items**

PartCode	Description	SerialNo	CategoryDesc	ModelNo	AssetRegNo	LocationDesc	Location
SP2020MFC	SP2020 Sprint MFC	2020-00036	Hardware	SP2020	S2345		Reception
SP2020ALT	SP2020 Alternate	2020-12341A	Hardware	SP2020ALT			
SP2020MFC	SP2020 Sprint MFC	2020-707541	Hardware	SP2020			

**Item Fees**

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input type="checkbox"/>	S	Service	0.00	1101		Service
<input type="checkbox"/>	I	Inhouse Rental	0.00	1201		Inhouse Rental
<input type="checkbox"/>	N	Insurance	0.00	1203		Insurance
			0.00			

In this screen,

- Scroll right to view all the contract item information.
- You can update/edit the following fields:
  - Link a **Location**
  - Link a **Shipping Address**
  - Link a **COS Account Code**
  - Link a **SLA Hours**
  - Link a **Travel Radius**
  - Link a **Travel Charge**

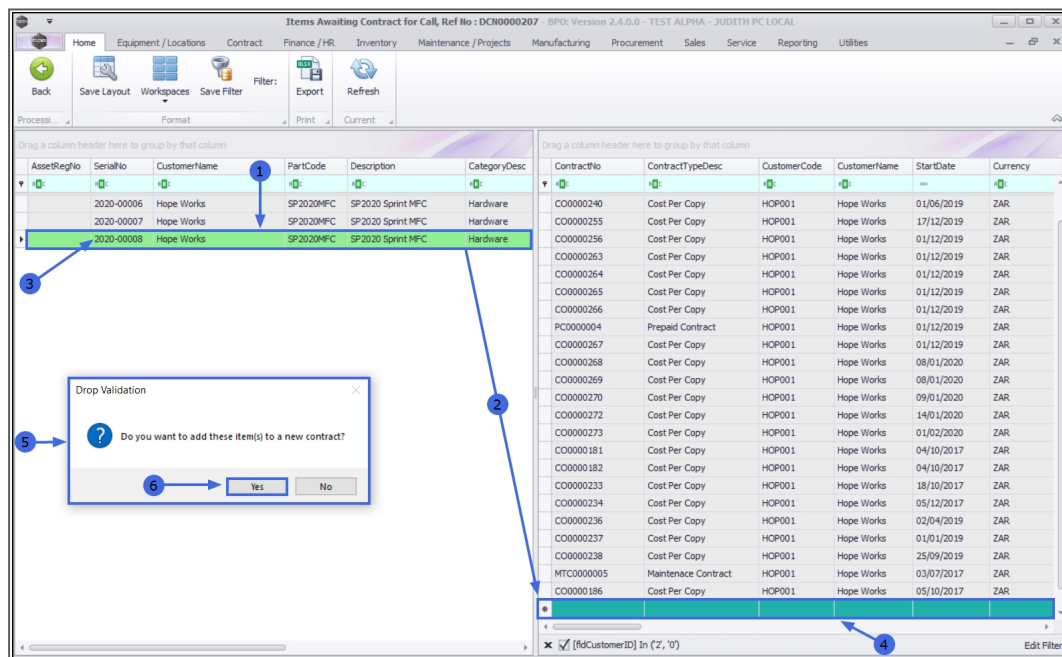
- You can input relevant data for the **Parts (Equipment Item) frame**.
- Leave the **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** as is.
- Click on **Save**.



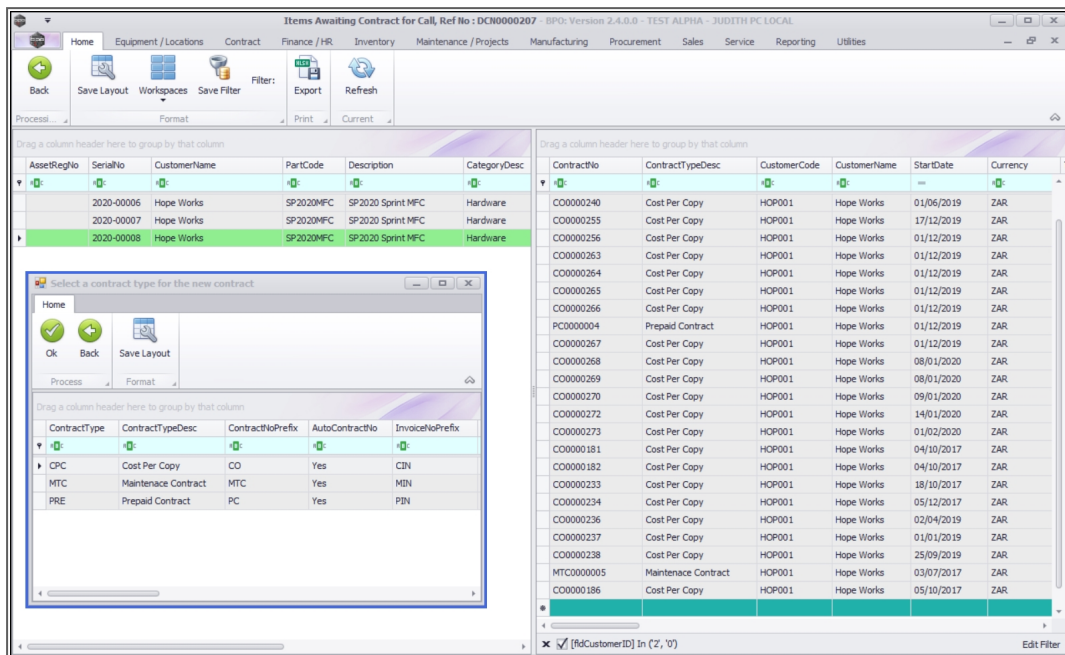
- The items will be linked to the **existing** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

## LINK A SINGLE ITEM TO A NEW CONTRACT

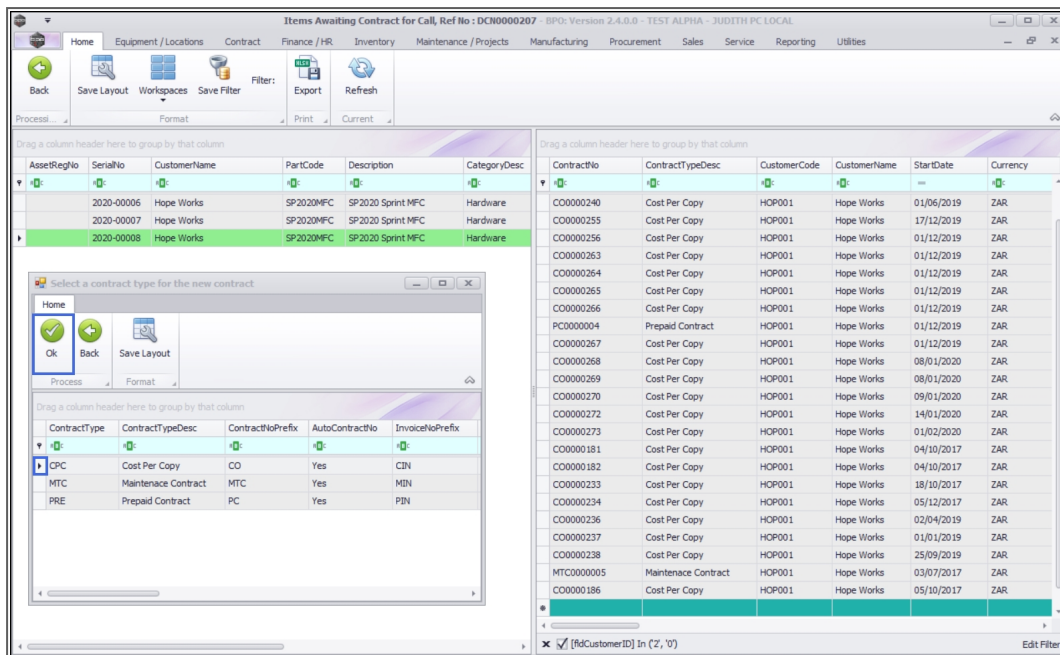
- In the **Items Awaiting Contract for Call** screen, click on the single item that you wish to add to a **new** contract.
- Drag the item to the last, blank row in data grid 2. This row contains an **asterisk** in the row selector column.
- In this example, serial no **2020-00008** has been selected, dragged and dropped to
- the final **blank row** in data grid 2.
- A **Drop Validation** message box will pop up asking;
  - Do you want to add these item(s) to a new contract?
- Click on **Yes**.



- The **Select a contract type for the new contract** screen will pop up.



- Click anywhere in the **row** of the **contract type** you wish to add.
- Click on **OK**.
  - In this image, **CPC** - Cost Per Copy has been selected.



Items Awaiting Contract for Call, Ref No : DCN0000207 BPO: Version 2.4.0.0 - TEST ALPHA - JUDITH PC LOCAL

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

Back Save Layout Workspaces Save Filter Filter: Export Refresh

Process: Format: Print: Current:

Drag a column header here to group by that column

AssetRegNo	SerialNo	CustomerName	PartCode	Description	CategoryDesc
2020-00006		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-00007		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware
2020-00008		Hope Works	SP2020MFC	SP2020 Sprint MFC	Hardware

Drag a column header here to group by that column

ContractNo	ContractTypeDesc	CustomerCode	CustomerName	StartDate	Currency
CO0000240	Cost Per Copy	HOP001	Hope Works	01/06/2019	ZAR
CO0000255	Cost Per Copy	HOP001	Hope Works	17/12/2019	ZAR
CO0000256	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000263	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000264	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000265	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000266	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
PC0000004	Prepaid Contract	HOP001	Hope Works	01/12/2019	ZAR
CO0000267	Cost Per Copy	HOP001	Hope Works	01/12/2019	ZAR
CO0000268	Cost Per Copy	HOP001	Hope Works	08/01/2020	ZAR
CO0000269	Cost Per Copy	HOP001	Hope Works	08/01/2020	ZAR
CO0000270	Cost Per Copy	HOP001	Hope Works	09/01/2020	ZAR
CO0000272	Cost Per Copy	HOP001	Hope Works	14/01/2020	ZAR
CO0000273	Cost Per Copy	HOP001	Hope Works	01/02/2020	ZAR
CO0000181	Cost Per Copy	HOP001	Hope Works	04/10/2017	ZAR
CO0000182	Cost Per Copy	HOP001	Hope Works	04/10/2017	ZAR
CO0000233	Cost Per Copy	HOP001	Hope Works	18/10/2017	ZAR
CO0000234	Cost Per Copy	HOP001	Hope Works	05/12/2017	ZAR
CO0000236	Cost Per Copy	HOP001	Hope Works	02/04/2019	ZAR
CO0000237	Cost Per Copy	HOP001	Hope Works	01/01/2019	ZAR
CO0000238	Cost Per Copy	HOP001	Hope Works	25/09/2019	ZAR
MTC0000005	Maintenance Contract	HOP001	Hope Works	03/07/2017	ZAR
CO0000186	Cost Per Copy	HOP001	Hope Works	05/10/2017	ZAR

Select a contract type for the new contract

Home

Ok Back Save Layout

Process: Format:

Drag a column header here to group by that column

ContractType	ContractTypeDesc	ContractNoPrefix	AutoContractNo	InvoiceNoPrefix
CPC	Cost Per Copy	CO	Yes	CIN
MTC	Maintenance Contract	MTC	Yes	MIN
PRE	Prepaid Contract	PC	Yes	PIN

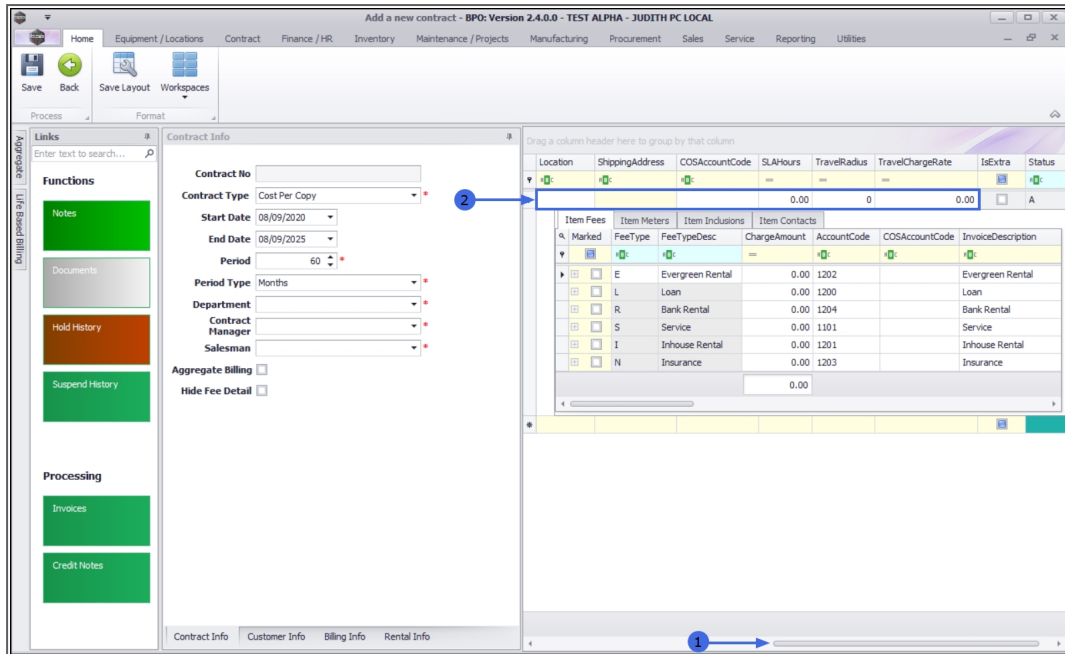
✕ [!dCustomerID] In (Z, '0') Edit Filter

The **Add a new contract** screen will be displayed.

- The item you are adding to the new **contract** will be listed in the **Parts** data grid.
- The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
  - **Items Fees**
  - **Item Meters**
  - **Item Inclusions**
  - **Items Contacts**

In this screen,

- Scroll right to view all the contract item information.
- You can update /edit the following fields:
  - Link a **Location**
  - Link a **Shipping Address**
  - Link a **COS Account Code**
  - Link a **SLA Hours**
  - Link a **Travel Radius**
  - Link a **Travel Charge**



**Contract Info**

Contract No:

Contract Type:

Start Date:

End Date:

Period:

Period Type:

Department:

Contract Manager:

Salesman:

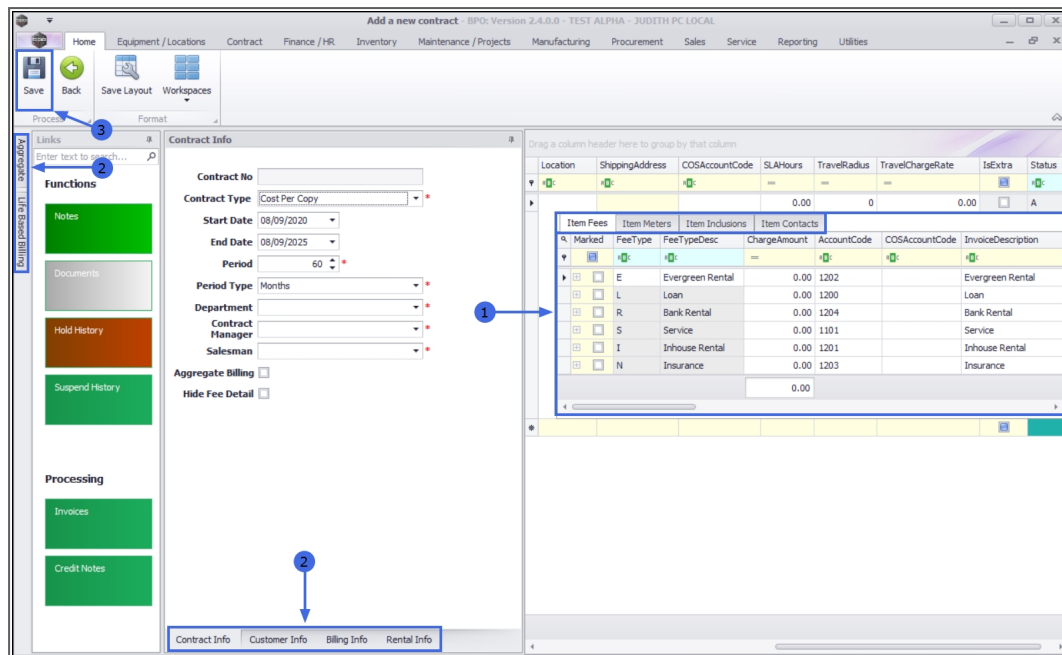
Aggregate Billing: ☐

Hide Fee Detail: ☐

Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	IsExtra	Status
			0.00	0	0.00		A

Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode	InvoiceDescription
Marked	FeeType	FeeTypeDesc	ChargeAmount			
	E	Evergreen Rental	0.00	1202		Evergreen Rental
	L	Loan	0.00	1200		Loan
	R	Bank Rental	0.00	1204		Bank Rental
	S	Service	0.00	1101		Service
	I	Inhouse Rental	0.00	1201		Inhouse Rental
	N	Insurance	0.00	1203		Insurance
			0.00			

- You can input relevant data for the **Part Item frame**.
- Add the relevant contract details to the; **Contract Info Panel**, **Customer Info Panel**, **Billing Info Panel**, (**Rental**, **Aggregate** and **Life Based Billing**, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- Click on **Save**.

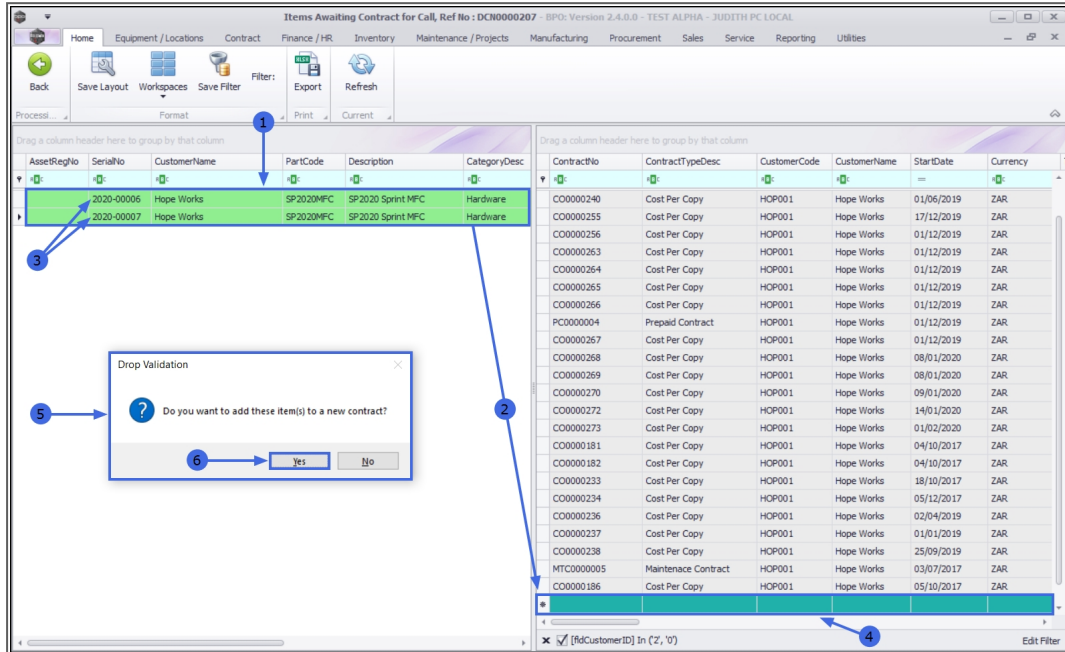


- The item will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

## LINK MULTIPLE ITEMS TO A NEW CONTRACT

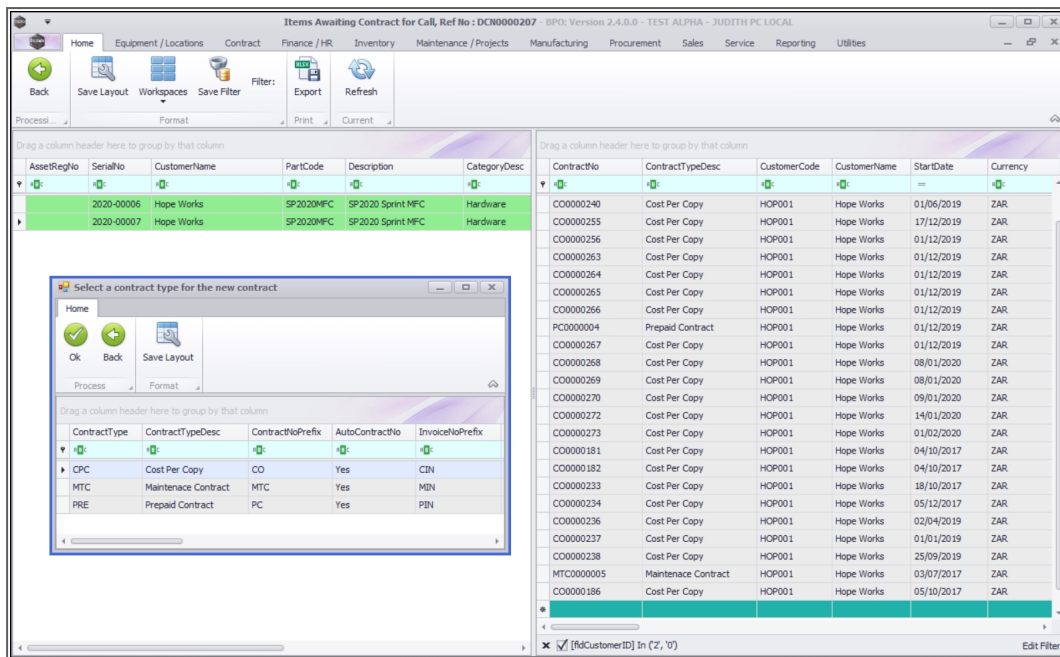
1. In the **Items Awaiting Contract** screen, select the multiple items in data grid **1** that you wish to link to a **new** contract.  
In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.
2. **Drag** the items to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
3. In this image, serial no's **2020-00006** and **2020-00007** have been selected, dragged and dropped on to
4. the final **blank row** in data grid **2**.

5. A **Drop Validation** message box will pop up asking;
  - Do you want to add these item(s) to a new contract?
6. Click on **Yes**.

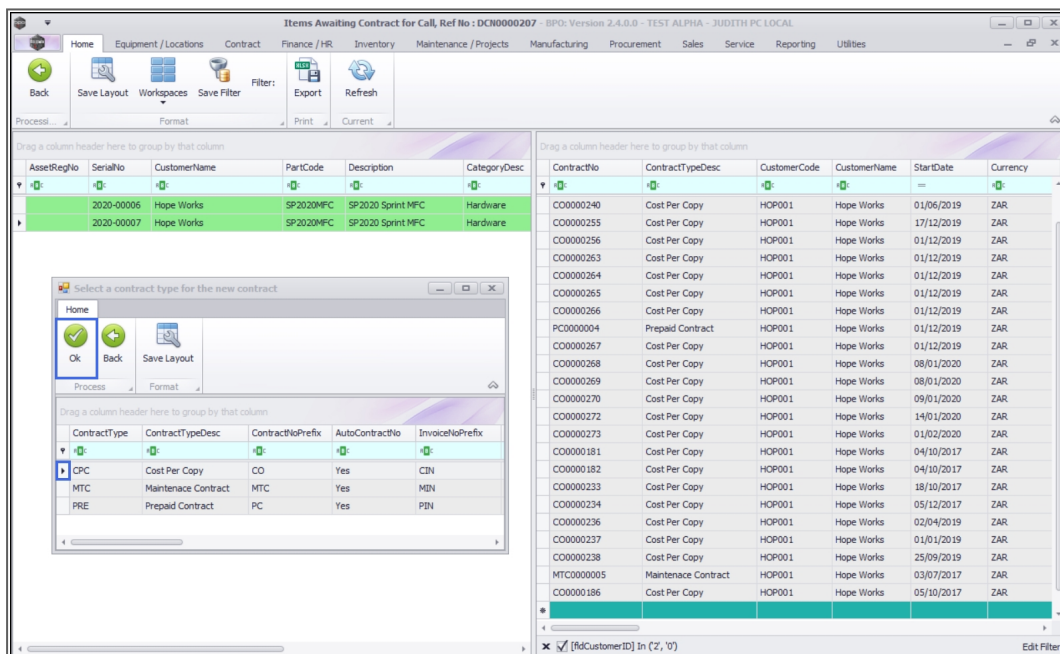


- The **Select a contract type for the new contract** screen will pop up.





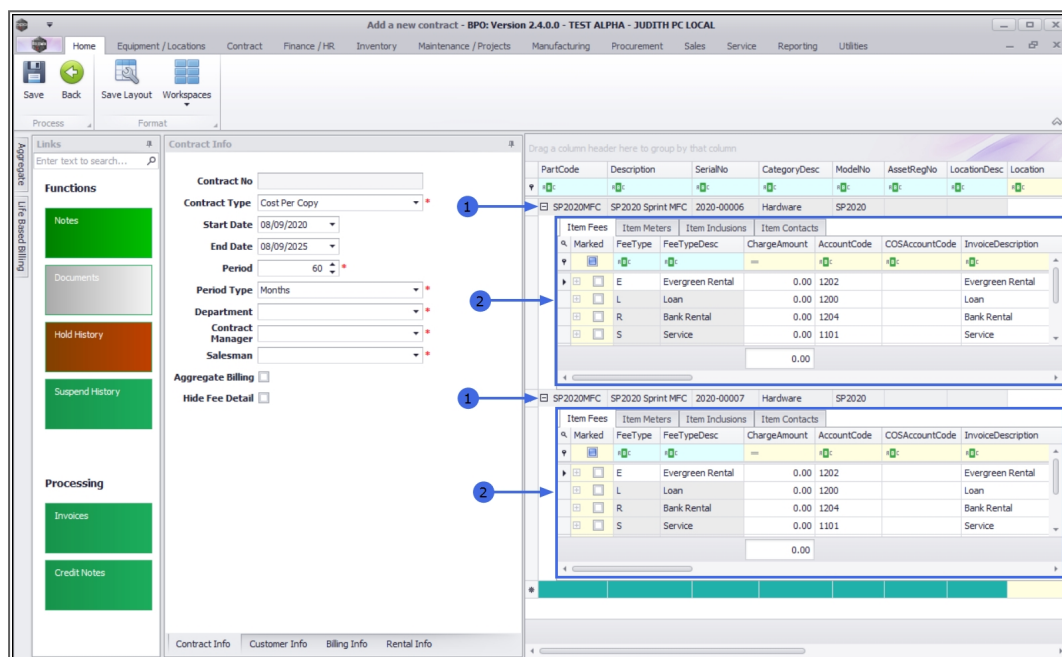
- Click anywhere in the row of the **contract type** you wish to add.
- Click on **OK**.
- In this image, **CPC** - Cost Per Copy has been selected.



The **Add a new contract** screen will be displayed.

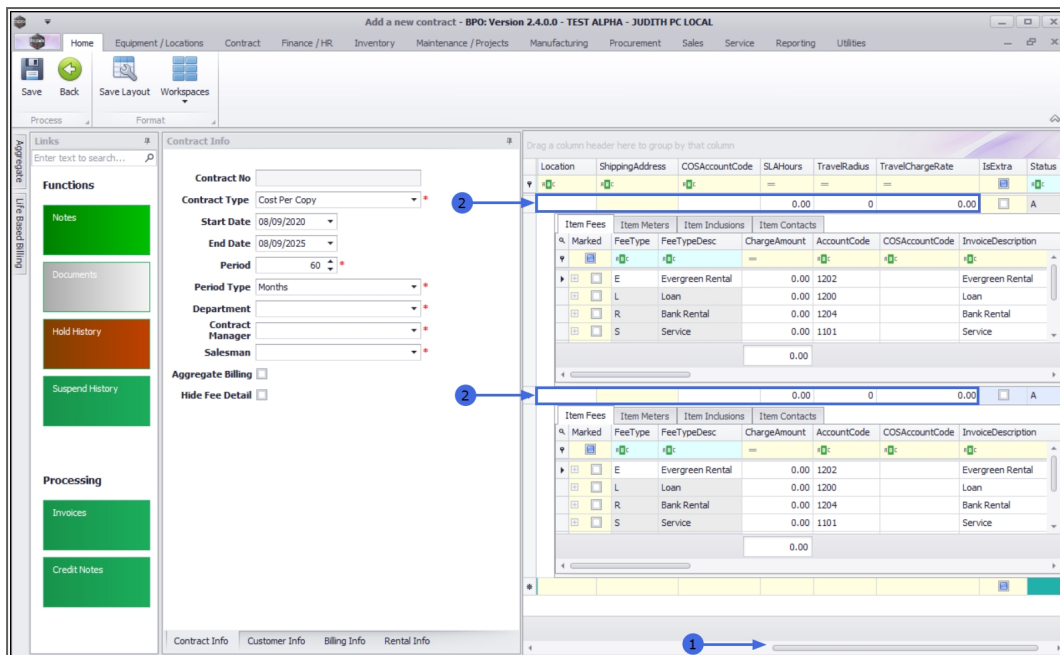


- The items that you are adding to the **new** contract will be listed in the **Parts** data grid.
- The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
  - Items Fees
  - Item Meters
  - Item Inclusions
  - Items Contacts



In this screen,

- Scroll right to view all the contract items information.
- You can update /edit the following fields:
  - Link a **Location**
  - Link a **Shipping Address**
  - Link a **COS Account Code**
  - Link a **SLA Hours**
  - Link a **Travel Radius**
  - Link a **Travel Charge**



Contract Info

Contract No:

Contract Type:

Start Date:

End Date:

Period:

Period Type:

Department:

Contract Manager:

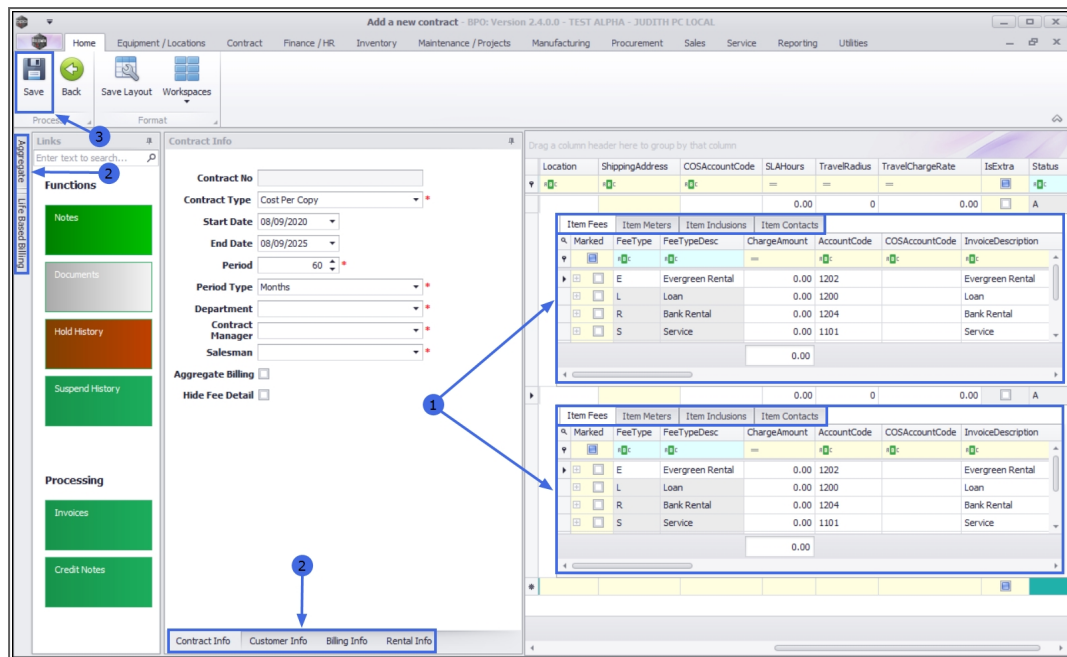
Salesman:

Aggregate Billing: ☐

Hide Fee Detail: ☐

Item Fees	Item Meters	Item Inclusions	Item Contacts	AccountCode	COSAccountCode	InvoiceDescription
E	Evergreen Rental	0.00	1202			Evergreen Rental
L	Loan	0.00	1200			Loan
R	Bank Rental	0.00	1204			Bank Rental
S	Service	0.00	1101			Service

- You can input relevant data for the **Parts Item frames**.
- Add the **new** contract details to the; **Contract Info Panel**, **Customer Info Panel**, **Billing Info Panel** (Rental, **Aggregate** and **Life Based Billing**, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- Click on **Save**.



**Contract Info**

Contract No:

Contract Type:

Start Date:

End Date:

Period:

Period Type:

Department:

Contract Manager:

Salesman:

Aggregate Billing: ☐

Hide Fee Detail: ☐

**Item Fees**

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input type="checkbox"/>	S	Service	0.00	1101		Service

**Item Meters**

Marked	MeterType	MeterTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription
<input type="checkbox"/>	E	Evergreen Rental	0.00	1202		Evergreen Rental
<input type="checkbox"/>	L	Loan	0.00	1200		Loan
<input type="checkbox"/>	R	Bank Rental	0.00	1204		Bank Rental
<input type="checkbox"/>	S	Service	0.00	1101		Service

**Contract Info** | **Customer Info** | **Billing Info** | **Rental Info**

- The items will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

MNU.122.042

