

# CONTRACTS

## CONTRACT EXPIRY - CLOSE CONTRACT

For expired contracts that remain active, you have the ability to buy back serial numbers that have been selected, if the selected items are customer assets.

### Buy Back Requests

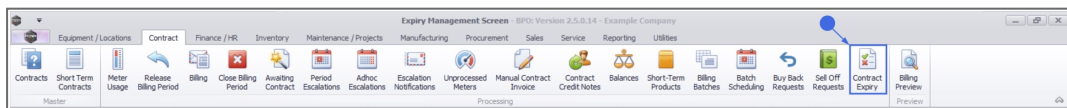
If there are serial numbers to buy back then the Buy Back Request maintain screen will be displayed for you to edit and save the details as needed. At that point the contract status will change to *End of Contract* and will be pending closure approval.

If there are Buy Back Requests created, they will be pending approval for processing the Buy Backs. If the closure request is cancelled then the buy-back requests will also be cancelled. The acceptance of the buy-backs will be contingent upon the closure request being approved.

### Internal Asset Return Requests

For the closure of a contract where an internal asset is selected, the contract status will change to *End of Contract* and a work order will be created to process the return upon approval of the closure request.

### **Ribbon** Select *Contract* > *Contract Expiry*



The ***Contract Expiry Management*** 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 **Expired** status, listing all the serial numbers on contracts that have expired, indicating the state of the serial number. The expiry date is based on the contract start date + contract period.

You can view all contracts, regardless of expiry date, by selecting the **All** status.

Marked	State	ContractNo	SerialNo	LocationDesc	ContractType	ContractTypeDesc	CustomerCode	CustomerName	OrderNo	StarDate	EndDate	Period
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000042	19-30200		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		07/09/2016	07/09/2022	
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000006	447788552211		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	22/04/2014	22/04/2019	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	D44-12245		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	2020-102047		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	CO0000006	1912-102035		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	22/04/2014	22/04/2019	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	CO0000049	2020-43256		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		16/05/2017	16/05/2022	
<input type="checkbox"/>		CO0000080	19-90201		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	06/05/2017	06/05/2020	
<input type="checkbox"/>		CO0000080	2020-10202		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	06/05/2017	06/05/2020	
<input type="checkbox"/>		CO0000052	1020-10102		PRE	Prepaid Contract	HCP001	Hope Works (Pty) Ltd		29/05/2017	29/05/2022	
<input type="checkbox"/>		CO0000052	12-12345		PRE	Prepaid Contract	HCP001	Hope Works (Pty) Ltd		29/05/2017	29/05/2022	
<input type="checkbox"/>		CO0000050	1020-10101		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		23/05/2017	23/05/2022	
<input type="checkbox"/>		CO0000044	2020-678787		CPC	Cost Per Copy	BOT0001	Bothas Networking inc		25/10/2016	25/10/2021	
<input type="checkbox"/>		CO0000044		Bothas Shop	CPC	Cost Per Copy	BOT0001	Bothas Networking inc		25/10/2016	25/10/2021	
<input type="checkbox"/>		CO0000043	2020-103053		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000043	2020-102041		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000043	nm10301		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000042	204-989898		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		07/09/2016	07/09/2022	
<input type="checkbox"/>		CO0000041	2020-103050		CPC	Cost Per Copy	PAN001	Panda Copiers		05/07/2016	05/07/2021	
<input type="checkbox"/>		CO0000031	3204REG000205		CPC	Cost Per Copy	YES001	Young Electric		24/03/2016	24/03/2021	
<input type="checkbox"/>		CO0000031	107		CPC	Cost Per Copy	YES001	Young Electric		24/03/2016	24/03/2021	
<input type="checkbox"/>		CO0000028	147807		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop		29/06/2015	29/06/2020	
<input type="checkbox"/>		CO0000028	147708		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop		29/06/2015	29/06/2020	
<input type="checkbox"/>		CO0000019		Stone Castle Shopping Centre	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited		28/07/2014	28/07/2019	
<input type="checkbox"/>		CO0000019	2020-10204		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited		28/07/2014	28/07/2019	
<input type="checkbox"/>		CO0000018	1912-102031		CPC	Cost Per Copy	SAM001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000018	19-121202		CPC	Cost Per Copy	SAM001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000018	20-147258		CPC	Cost Per Copy	SAM001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000016	SP19-12185274		CPC	Cost Per Copy	TIA001	Titan Group		13/06/2014	13/06/2019	
<input type="checkbox"/>		CO0000012		South Riding Centre - First Floor LB	CPC	Cost Per Copy	TIA001	Titan Group		16/05/2014	16/05/2019	

## CLOSE CONTRACT

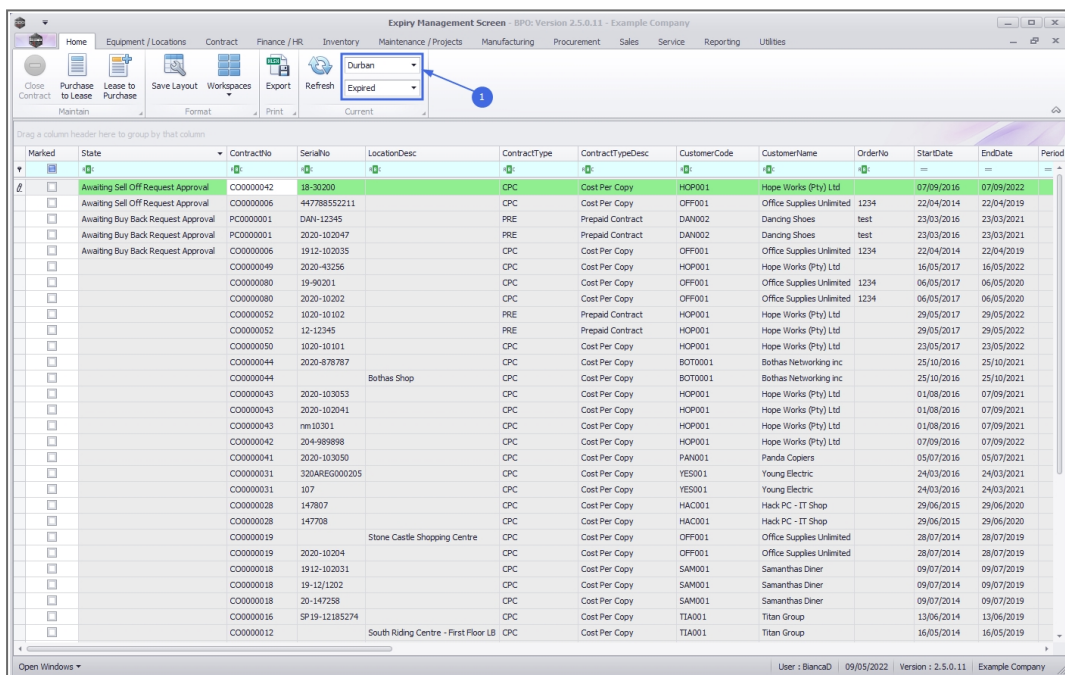
### Select the Site

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.

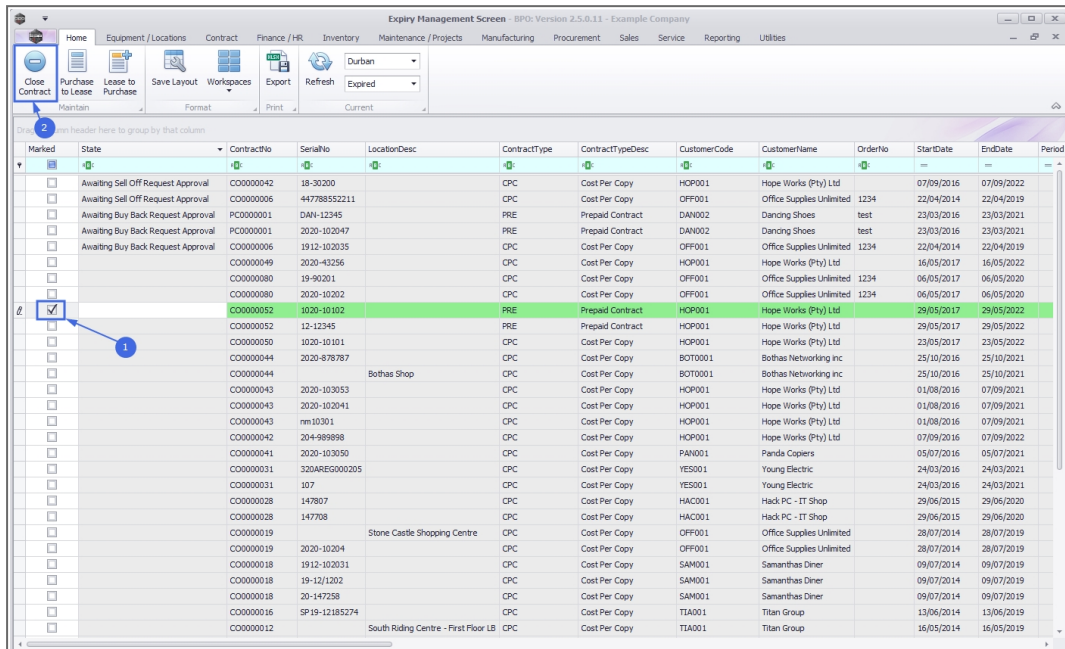
If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

The Expiry Status filter is set to **Expired** by default. This filter can be changed to view **All** contracts.




- Select the contract that you need to close. Only one line need be selected where multiple items exist on the contract.

- Click on the **Close Contract** button. *Note* that this button will be greyed out if there are pending Buy Back or Sell Off requests for the selected contract.



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

 Refer to **"Contract Closure Approval"** on page 1 for more information relating to Approving or Declining this Contract Closure.

## BUY BACK ITEMS

If customer assets exist on the contract, you will have the option to buy back these items.

- A message box will come up, asking: **Do you want to buy back items on this contract?**
- Select **Yes**

The screenshot shows the 'Expiry Management Screen' with a list of contracts. A dialog box titled 'Buy Back' is open, asking 'Do you want to buy back items on this contract?' with 'Yes' and 'No' buttons.

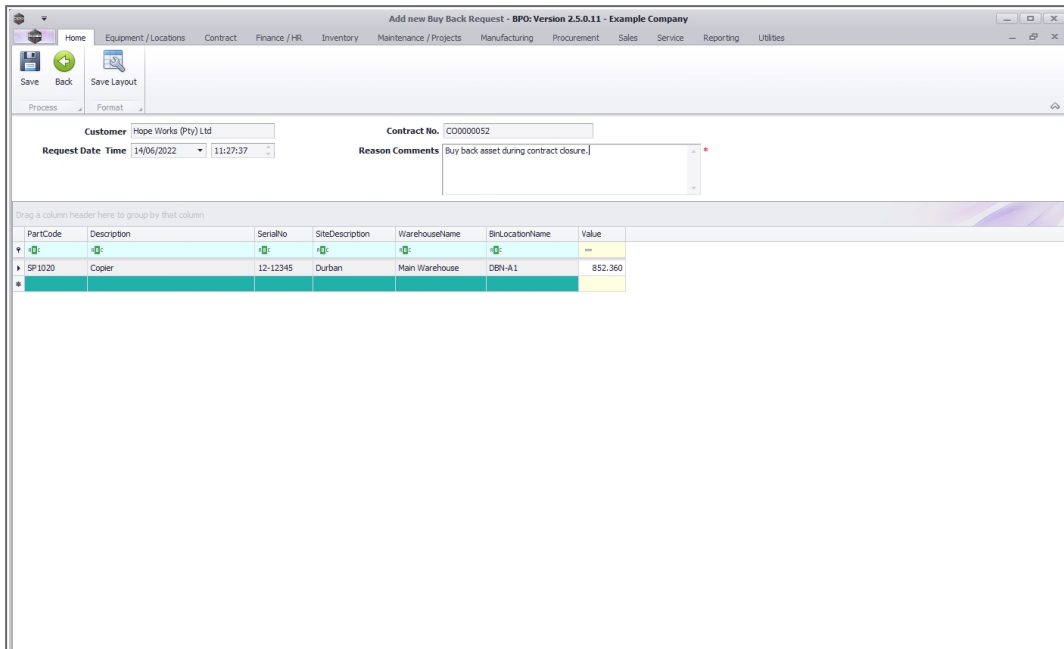
Marked	State	ContractNo	SerialNo	LocationDesc	ContractType	ContractTypeDesc	CustomerCode	CustomerName	OrderNo	StartDate	EndDate	Period
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000042	18-30200		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		07/09/2016	07/09/2022	
<input type="checkbox"/>	Awaiting Sell Off Request Approval	CO0000006	447788552211		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	22/04/2014	22/04/2019	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	DAN-12345		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	PC0000001	2020-102047		PRE	Prepaid Contract	DAN002	Dancing Shoes	test	23/03/2016	23/03/2021	
<input type="checkbox"/>	Awaiting Buy Back Request Approval	CO0000006	1912-102035		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	22/04/2014	22/04/2019	
<input type="checkbox"/>		CO0000049	2020-43256		CPC	Cost Per Copy	HCP001	Hope Works (Pty) Ltd		16/05/2017	16/05/2022	
<input type="checkbox"/>		CO0000080	19-90201		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	06/05/2017	06/05/2020	
<input type="checkbox"/>		CO0000080	2020-10202		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	1234	06/05/2017	06/05/2020	
<input checked="" type="checkbox"/>		CO0000052	1020-10102		PRE	Prepaid Contract	HCP001	Hope Works (Pty) Ltd		29/05/2017	29/05/2022	
<input type="checkbox"/>		CO0000052	12-12345		PRE	Prepaid Contract	HCP001	Hope Works (Pty) Ltd		29/05/2017	29/05/2022	
<input type="checkbox"/>		CO0000050	1020-10101				0001	Hope Works (Pty) Ltd		23/05/2017	23/05/2022	
<input type="checkbox"/>		CO0000044	2020-878787				0001	Bothas Networking Inc		25/10/2016	25/10/2021	
<input type="checkbox"/>		CO0000044		Bothas Shop			0001	Bothas Networking Inc		25/10/2016	25/10/2021	
<input type="checkbox"/>		CO0000043	2020-103053				0001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000043	2020-102041				0001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000043	nm10301				0001	Hope Works (Pty) Ltd		01/08/2016	07/09/2021	
<input type="checkbox"/>		CO0000042	204-989898				0001	Hope Works (Pty) Ltd		07/09/2016	07/09/2022	
<input type="checkbox"/>		CO0000041	2020-103050		CPC	Cost Per Copy	PAN001	Panda Copiers		05/07/2016	05/07/2021	
<input type="checkbox"/>		CO0000031	320AREG000205		CPC	Cost Per Copy	YES001	Young Electric		24/03/2016	24/03/2021	
<input type="checkbox"/>		CO0000031	107		CPC	Cost Per Copy	YES001	Young Electric		24/03/2016	24/03/2021	
<input type="checkbox"/>		CO0000028	147807		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop		29/06/2015	29/06/2020	
<input type="checkbox"/>		CO0000028	147708		CPC	Cost Per Copy	HAC001	Hack PC - IT Shop		29/06/2015	29/06/2020	
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<input type="checkbox"/>		CO0000019	2020-10204		CPC	Cost Per Copy	OFF001	Office Supplies Unlimited		28/07/2014	28/07/2019	
<input type="checkbox"/>		CO0000018	1912-102031		CPC	Cost Per Copy	SAM001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000018	19-121/202		CPC	Cost Per Copy	SAM001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000018	20-147558		CPC	Cost Per Copy	SAM001	Samanthas Diner		09/07/2014	09/07/2019	
<input type="checkbox"/>		CO0000016	SP19-12185274		CPC	Cost Per Copy	TIA001	Titan Group		13/06/2014	13/06/2019	
<input type="checkbox"/>		CO0000012		South Riding Centre - First Floor LB	CPC	Cost Per Copy	TIA001	Titan Group		16/05/2014	16/05/2019	

- A list of available serial numbers that can be bought back (customer assets) will display.
- Select 1 or multiple items, as required.

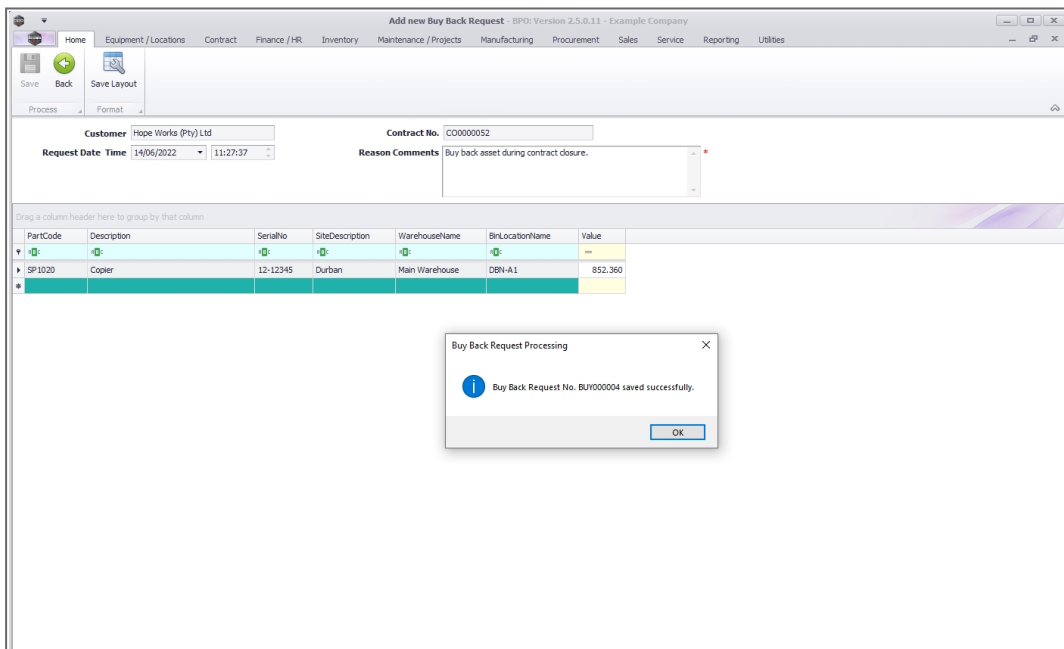
The screenshot shows the 'Expiry Management Screen' with a dialog box titled 'Select Items for Buy Back processing' open. The dialog box contains a table with columns for 'Marked', 'PartCode', 'Description', 'SerialNo', and 'Value'.

Marked	PartCode	Description	SerialNo	Value
<input checked="" type="checkbox"/>	SP1020	Copier	12-12345	852.36

- Update each item with the buy back **Value**.
- Click on the **Save** button.



- A message box will come up, noting: **Buy Back Request No ... saved successfully.**



- The contract status will updated to **End of Contract**, and must be approved in order to complete the closure process.



Refer to "[Contract Closure Approval](#)" on page 1 for more information relating to Approving or Declining this Contract Closure.

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### Related Topics

- [Contract Closure Approval](#)
- [Contract Expiry](#)

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