

SALES

CUSTOMERS - CONTRACTS

The **Contracts for Customer** screen lists all the Contract information linked to a specific Customer and is a <u>view only</u> screen. The Contract Number and Contract Type as well as the Currency, Start Date and End Date can be viewed here.

Ribbon Access: Sales > Customers

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- 1. The *Customer Listing* screen will be displayed.
- 2. Select the *Site* where the customer can be located.
 - The example has *Durban* selected.
- 3. Select the *Status* for the customer.
 - The example has Active *Durban* selected.
- 4. Select the *row* of the *Customer* you wish to view the Contract information for.
- 5. Click on the *Contracts* tile.



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			DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	98/7654
			OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456
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			WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456
_			TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258
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			SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456
			DAN001	Π	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654
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			PIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
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6. The *Contracts for Customer - [customer code]* screen will be displayed.

You can only *view* the contracts linked to this customer in this screen.

- 7. The current contract *Fees* and *Info* frames containing contract fee history are pinned to the *Contracts for Customer* screen, for your convenience.
 - Unpin to hide the Fees and/or Info frames.



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- Although you cannot edit the details in this screen, you can use the Save Layout button to keep your changes, for example, <u>any data grid</u> <u>changes</u> or pinning / unpinning frames.
- 9. Click on *Back* to return to the Customer Listing Screen.



Customers - Contracts

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