CONTRACT

CONTRACTS - ADD (PRE V2.3.0.0)

In BPO2 you can create either a **service** contract or a **rental** contract.

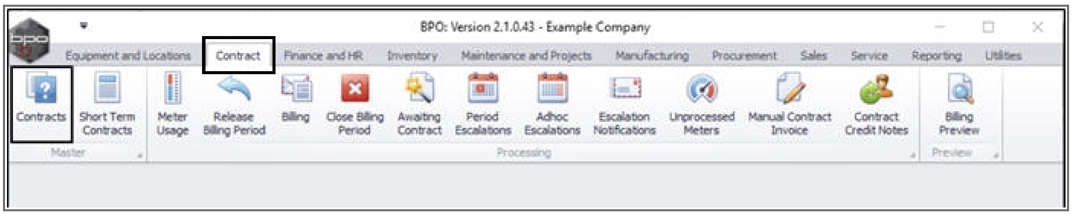
Service Contract: Machine sold to customer outright or via a finance house.

- A New Deal Sale must be completed in order to create this contract.

Rental Contract: In-house rental (machine owned by company).

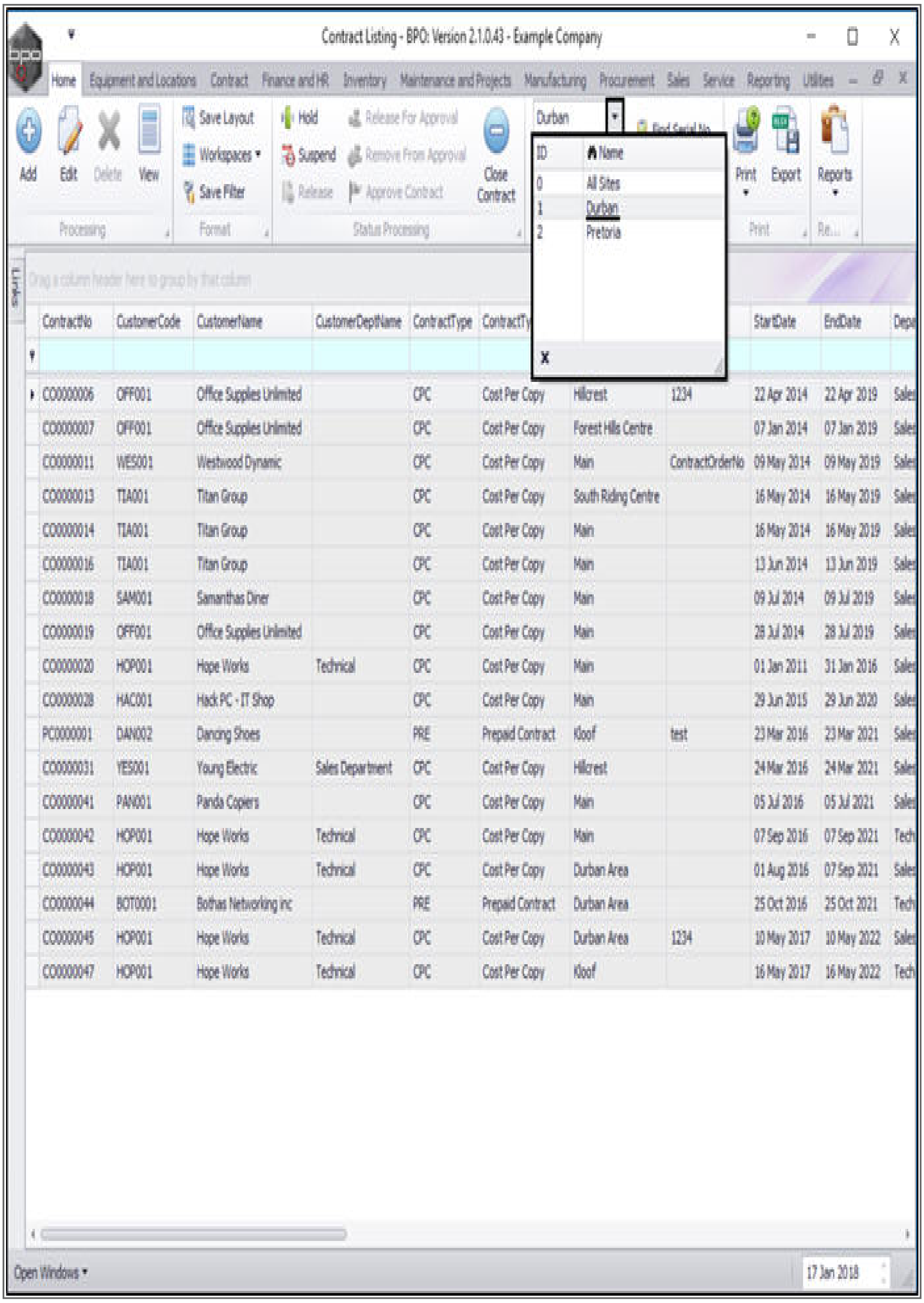
- New Deal Rental must be completed in order to create this contract.

Ribbon Access: *Contract > Contracts*

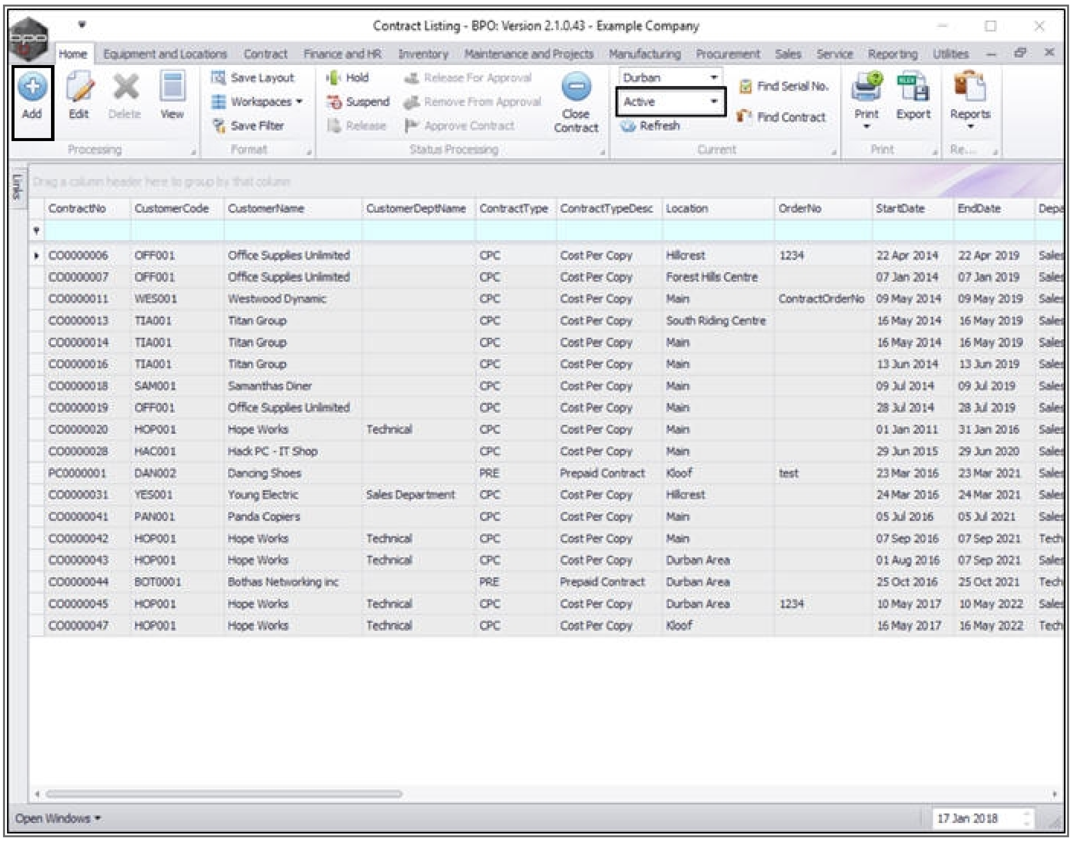


The ***Contract Listing*** screen will be displayed.

- Select the ***Site*** that you wish to work in.
  - In this image ***Durban*** has been selected.


Contract Listing - BPO: Version 2.1.0.43 - Example Company
Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities
Add Edit Delete View
Save Layout
Workspaces
Save Filter
Hold
Suspend
Release
Release For Approval
Remove From Approval
Approve Contract
Close Contract
Durban
ID Name
0 All Sites
1 Durban
2 Pretoria
Print Export Reports
Processing Format Status Processing Print
Drag a column header here to group by that column
ContractNo CustomerCode CustomerName CustomerDeptName ContractType StartDate EndDate
CO0000006 OFF001 Office Supplies Unlimited CPC Cost Per Copy Hillcrest 1234 22 Apr 2014 22 Apr 2019
CO0000007 OFF001 Office Supplies Unlimited CPC Cost Per Copy Forest Hills Centre 07 Jan 2014 07 Jan 2019
CO0000011 WES001 Westwood Dynamic CPC Cost Per Copy Main ContractOrderNo 09 May 2014 09 May 2019
CO0000013 TIA001 Titan Group CPC Cost Per Copy South Riding Centre 16 May 2014 16 May 2019
CO0000014 TIA001 Titan Group CPC Cost Per Copy Main 16 May 2014 16 May 2019
CO0000016 TIA001 Titan Group CPC Cost Per Copy Main 13 Jun 2014 13 Jun 2019
CO0000018 SAM001 Samanthas Diner CPC Cost Per Copy Main 09 Jul 2014 09 Jul 2019
CO0000019 OFF001 Office Supplies Unlimited CPC Cost Per Copy Main 28 Jul 2014 28 Jul 2019
CO0000020 HOP001 Hope Works Technical CPC Cost Per Copy Main 01 Jan 2011 31 Jan 2016
CO0000028 HAC001 Hack PC - IT Shop CPC Cost Per Copy Main 29 Jun 2015 29 Jun 2020
PC0000001 DAN002 Dancing Shoes PRE Prepaid Contract Kloof test 23 Mar 2016 23 Mar 2021
CO0000031 YES001 Young Electric Sales Department CPC Cost Per Copy Hillcrest 24 Mar 2016 24 Mar 2021
CO0000041 PAN001 Panda Copiers CPC Cost Per Copy Main 05 Jul 2016 05 Jul 2021
CO0000042 HOP001 Hope Works Technical CPC Cost Per Copy Main 07 Sep 2016 07 Sep 2021
CO0000043 HOP001 Hope Works Technical CPC Cost Per Copy Durban Area 01 Aug 2016 07 Sep 2021
CO0000044 BOT0001 Bothas Networking inc PRE Prepaid Contract Durban Area 25 Oct 2016 25 Oct 2021
CO0000045 HOP001 Hope Works Technical CPC Cost Per Copy Durban Area 1234 10 May 2017 10 May 2022
CO0000047 HOP001 Hope Works Technical CPC Cost Per Copy Kloof 16 May 2017 16 May 2022
Open Windows
17 Jan 2018

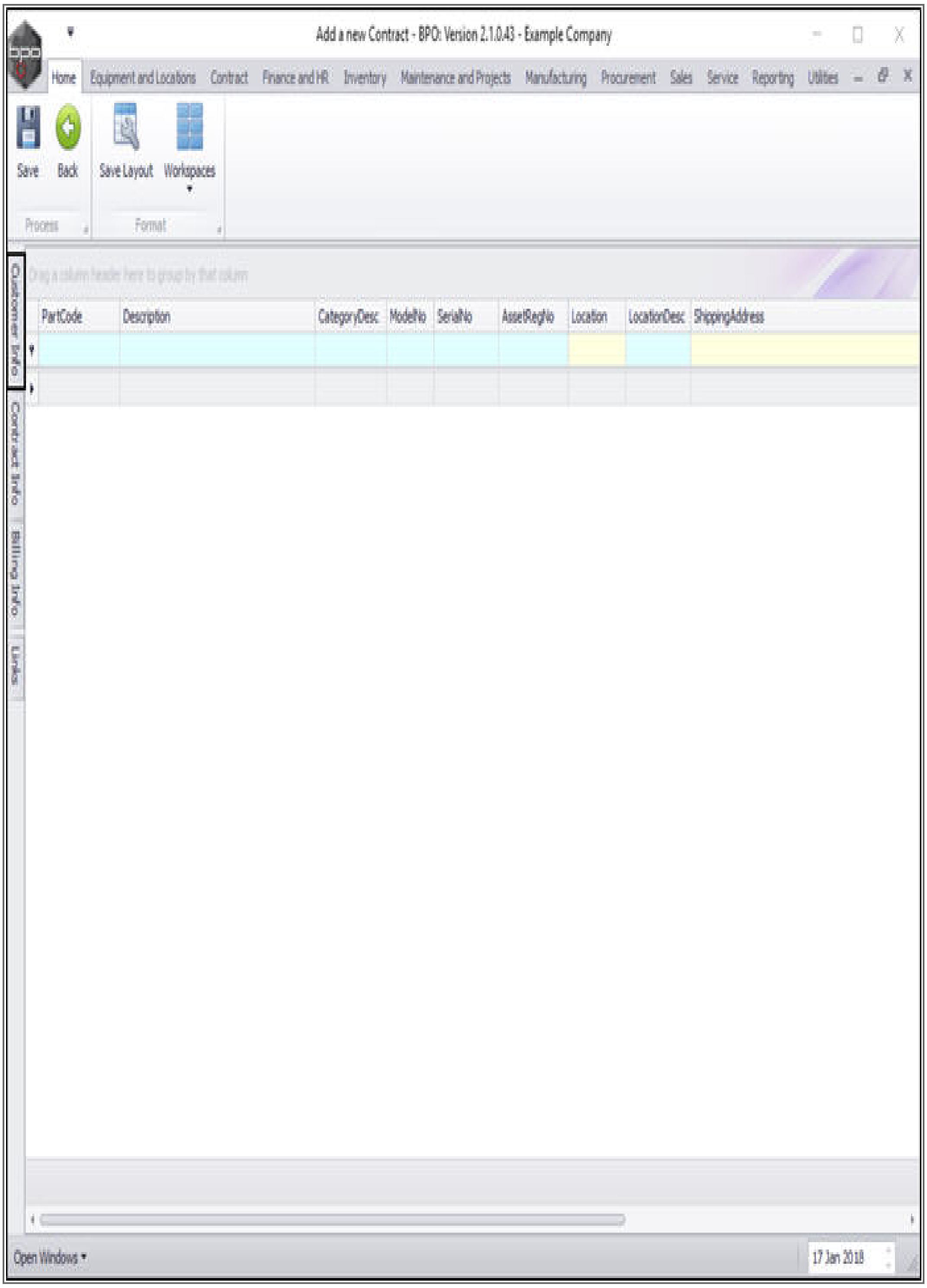
- By default, this screen will list all the ***Active*** contracts for the selected site.
    - You do not need to change this status to create/add a new contract.
- Click on ***Add***.



- The ***Add a new Contract*** screen will be displayed.

CUSTOMER INFO PANEL

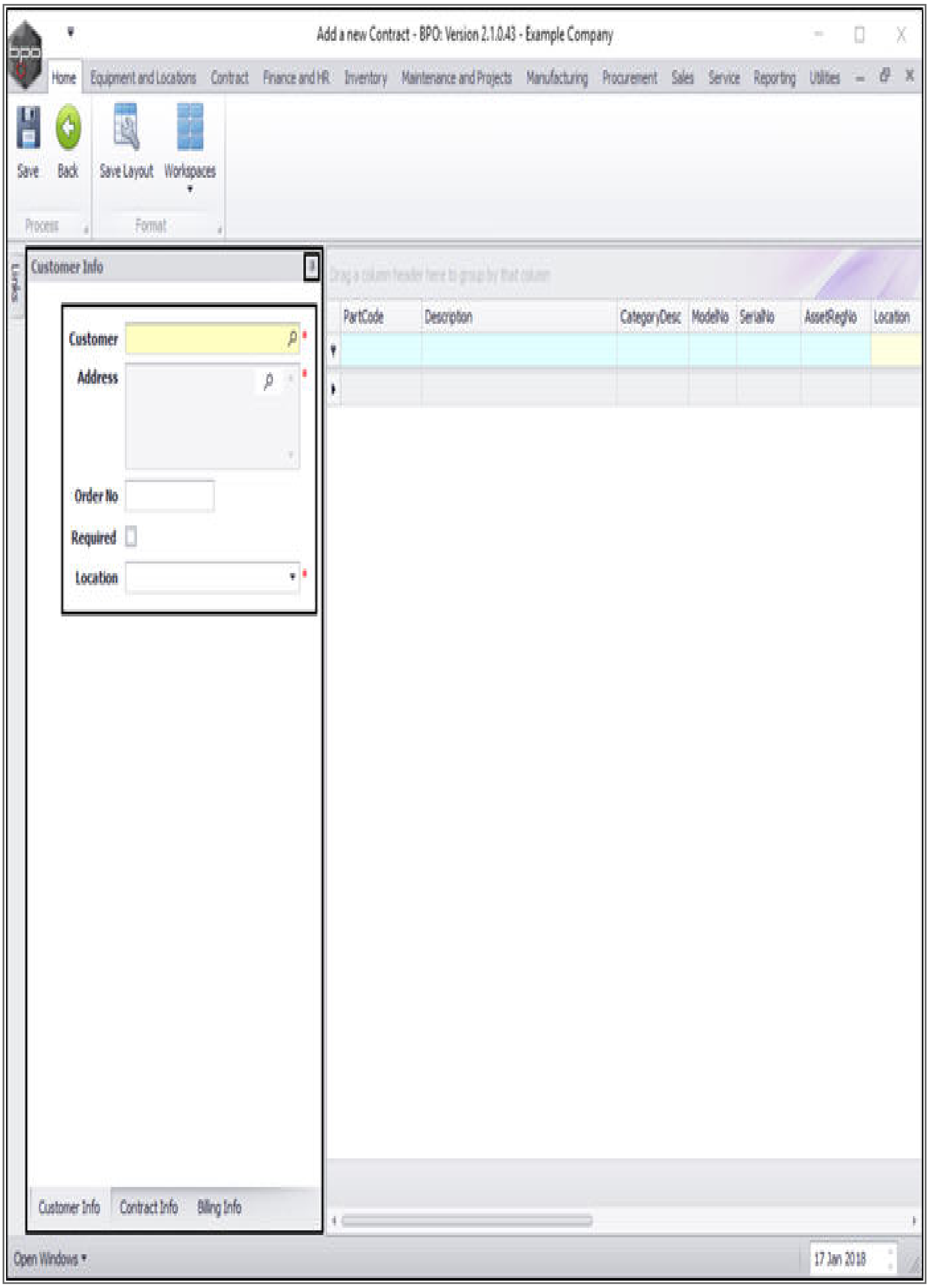
- Click on the ***Customer Info*** tab.



The ***Customer Info*** panel will expand.

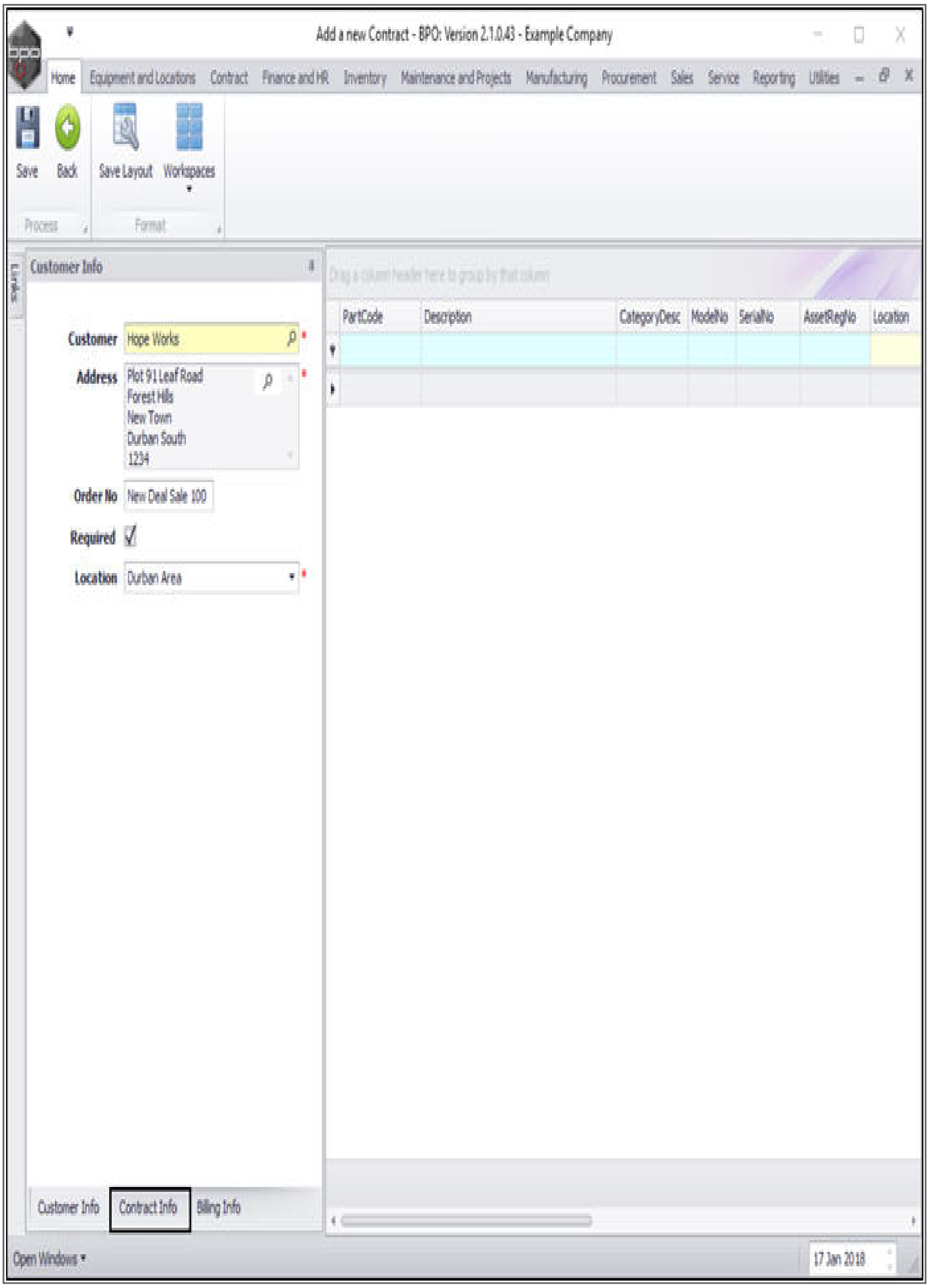
    - **Note:** ***Dock*** this panel to make it easier to work in.

- **Customer:** Click on the search button and select the customer from the ***Select a customer for this contract*** pop up screen.
- **Address:** Click on the search button and select the address from the ***Select an address for this contract*** pop up screen.
- **Order No:** Type in the customer order number if required.
- **Required:** Only select this check box if the client must supply an order number before a technician is sent to site.
- **Location:** Click on the drop-down arrow and select the contract location from the menu.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Customer Info
Customer
Address
Order No
Required
Location
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
Customer Info
Contract Info
Billing Info
Open Windows
17 Jan 2018

CONTRACT INFO PANEL

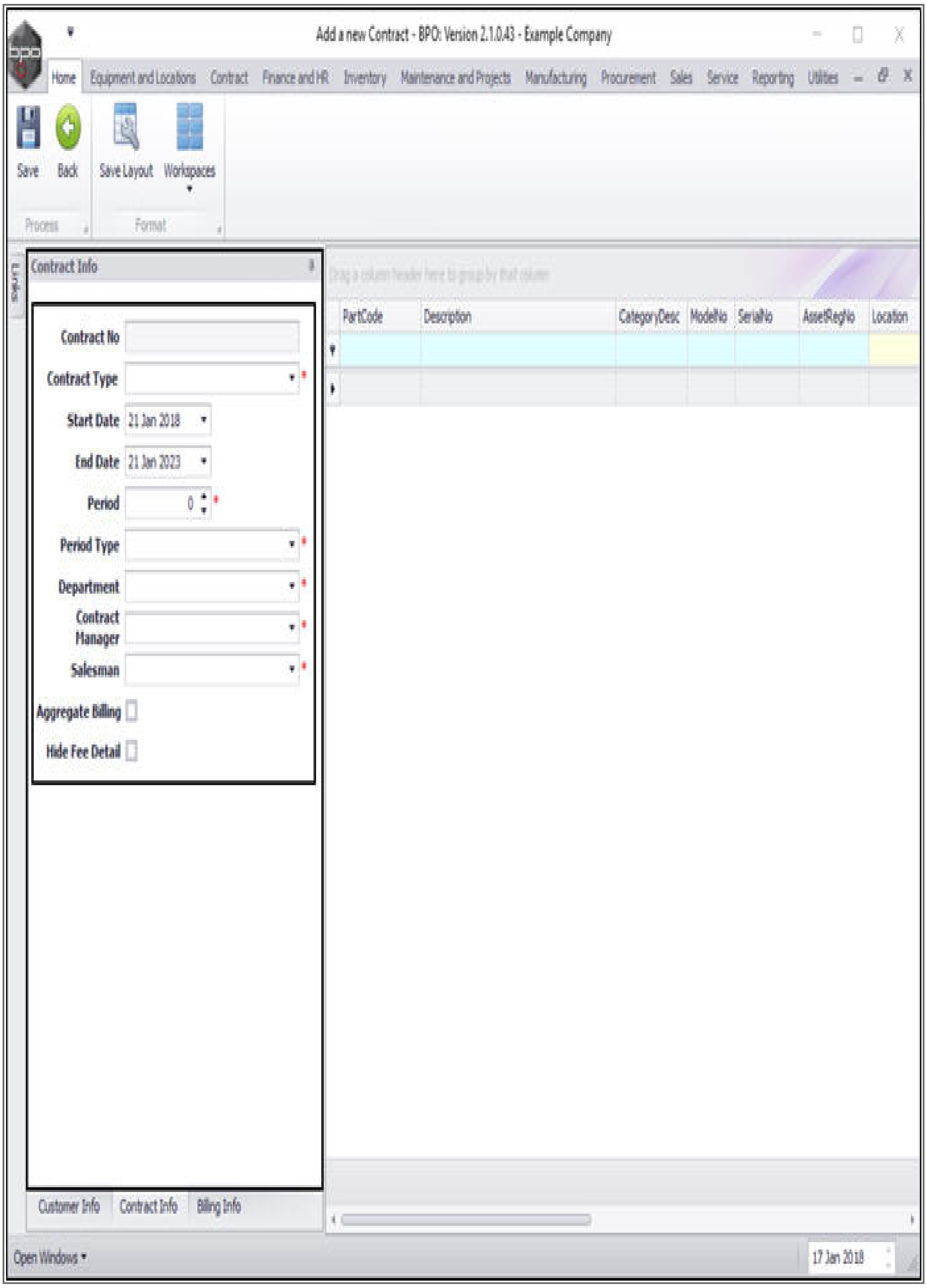
- When you have finished editing the customer info details, click on the ***Contract Info*** tab.



The ***Contract Info panel*** will expand.

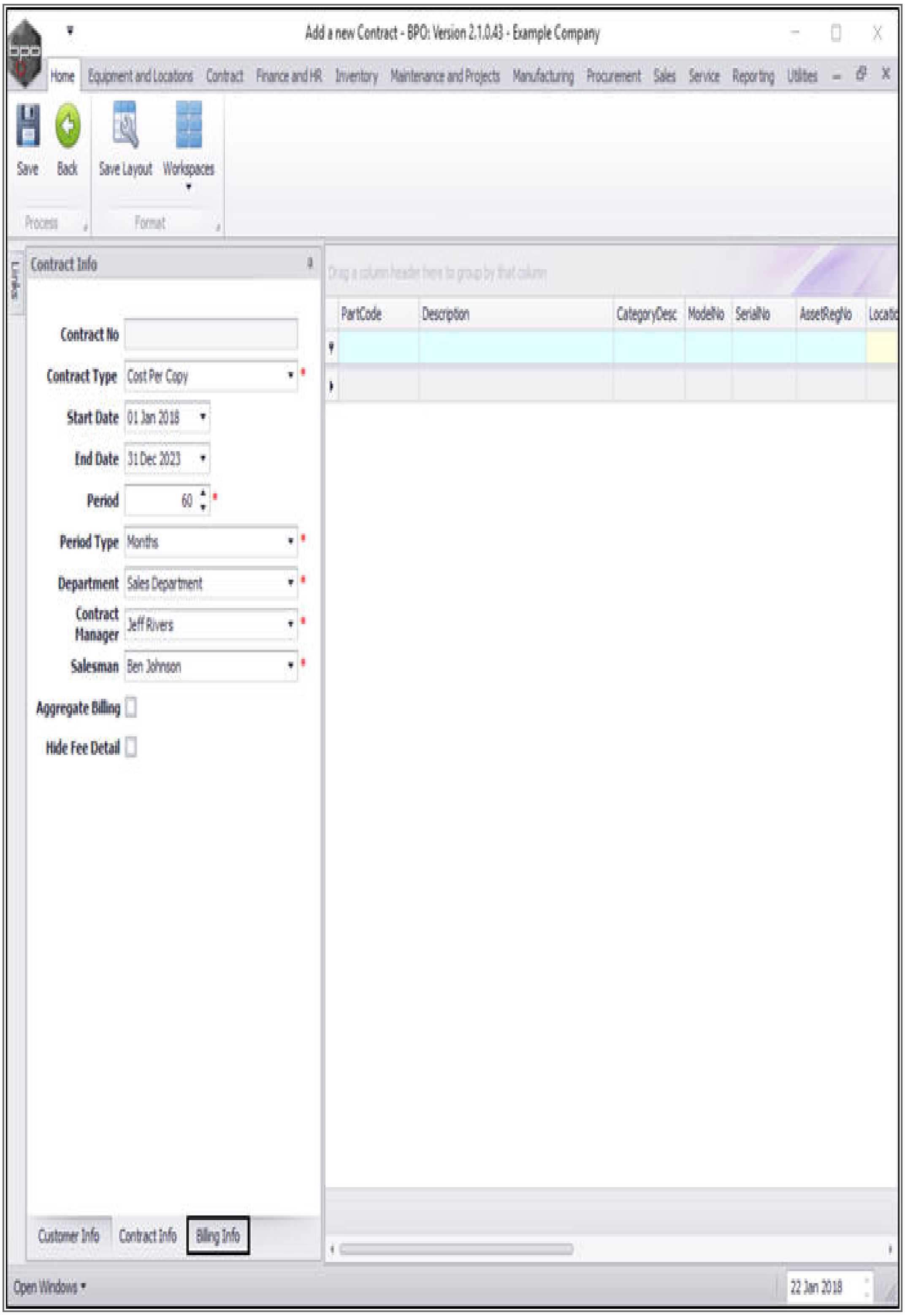
- **Contract No:** The contract number is generated by the system (where configured in the Contract Type set up).
- **Contract Type:** Click on the drop-down arrow and select the Contract Type e.g., Prepaid Contract.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- **End Date:** This will auto populate 5 years from the start date but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
- **Period:** Either type in or use the arrow indicators to select the period of the contract (life span of the contract).
- **Period Type:** Select the period type (measure relating to the lifespan), e.g., 60 months.
- **Department:** Click on the drop-down arrow and select the department.
- **Contract Manager:** Click on the drop-down arrow and select the contract manager.
- **Salesman:** Click on the drop-down arrow and select the salesman.
- **Aggregate Billing:** Click on this check box if the customer will receive aggregate billing.
- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.

    - **Note:** If this is an evergreen contract, set your end date to 31/12/2999


Add a new Contract - BPO: Version 2.1.0.43 - 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
Contract Info
Contract No
Contract Type
Start Date
21 Jan 2018
End Date
21 Jan 2023
Period
0
Period Type
Department
Contract Manager
Salesman
Aggregate Billing
Hide Fee Detail
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
Customer Info
Contract Info
Billing Info
Open Windows
17 Jan 2018

BILLING INFO PANEL

- When you have finished editing the contract info details, click on the ***Billing Info*** tab.



The ***Billing Info panel*** will be expanded.

    - **Note:** Some of these details will auto populate but they can be changed as explained below.

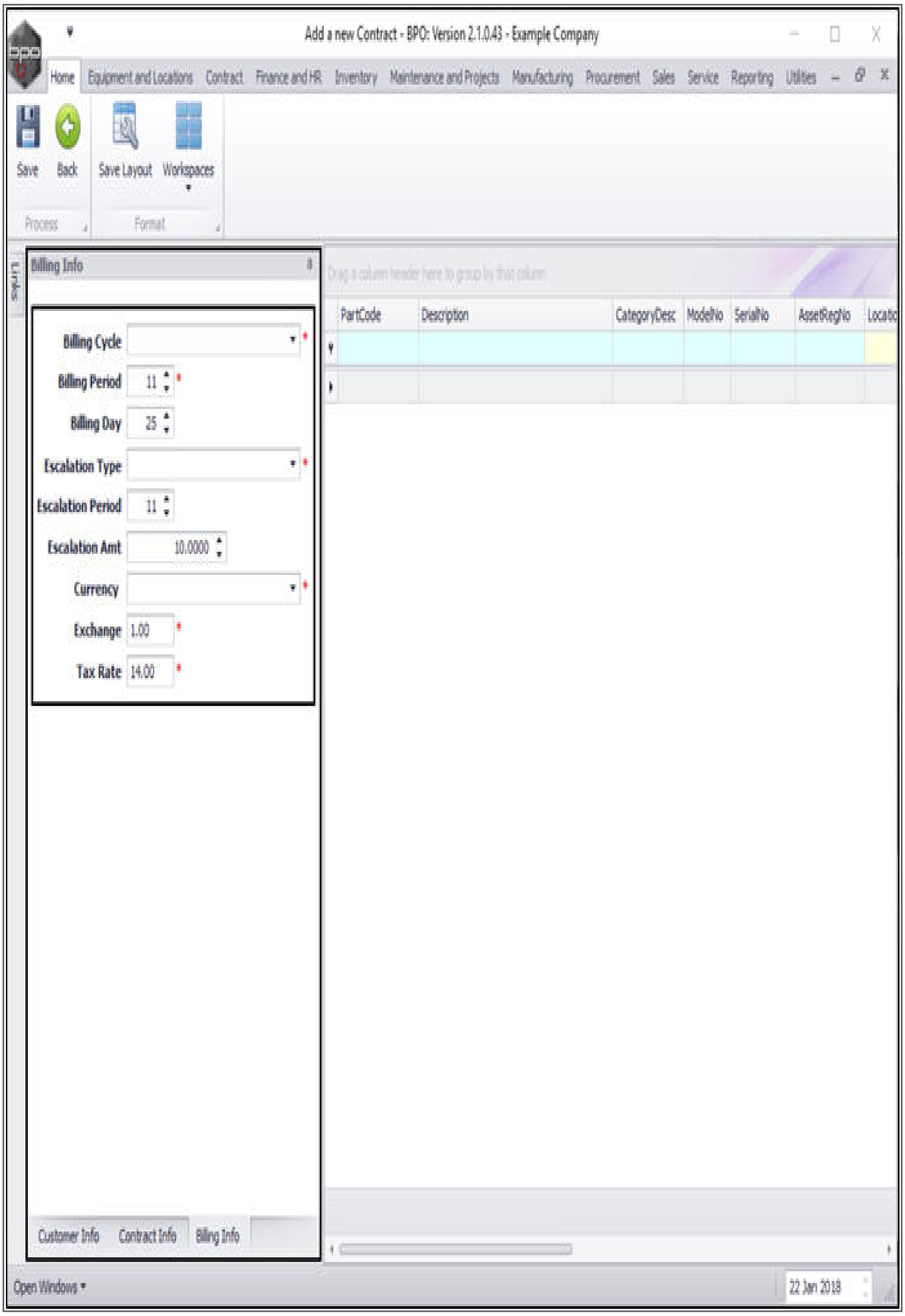
- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- **Billing Period:** This is the financial period in which billing will first begin. Type in or use the arrow indicators to select the period number (e.g., January = 11).
- **Billing Day:** Type in the day that the customer will be billed (e.g., on the 25th of each billing cycle).

NOTE ON BILLING DAY

- The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the Contract Billing screen. The Billing Day is limited to 31. You can type in the day that the customer will be billed (e.g., on the 25th of each billing cycle) else leave as 0.

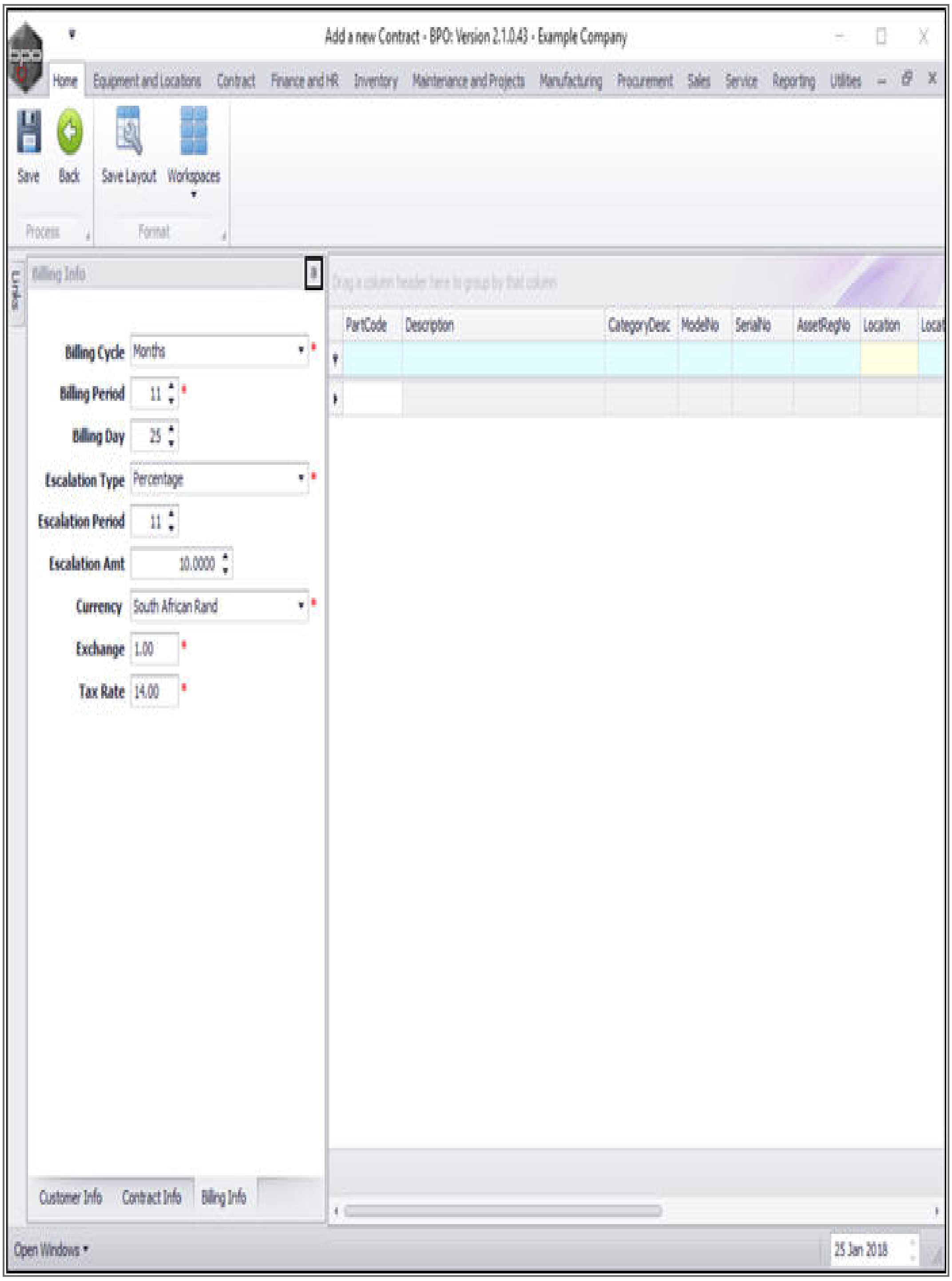
- **Escalation Type:** Search for and Select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g., 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
    - **Note:** If this escalates on the anniversary of the contract, then use the same financial period as the billing period
- **Currency:** The system will auto populate with the currency already set up on the customer but you can click on the drop-down arrow and select an alternative currency if required.

    - **Note:** For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g., type in the Dollar amount if the currency is USD.
- **Exchange:** Type in the exchange rate.
- **Tax Rate:** Type in the tax rate.



Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Billing Info
Billing Cycle
Billing Period
11
Billing Day
25
Escalation Type
Escalation Period
11
Escalation Amt
10.0000
Currency
Exchange
1.00
Tax Rate
14.00
Customer Info
Contract Info
Billing Info
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Open Windows
22 Jan 2018

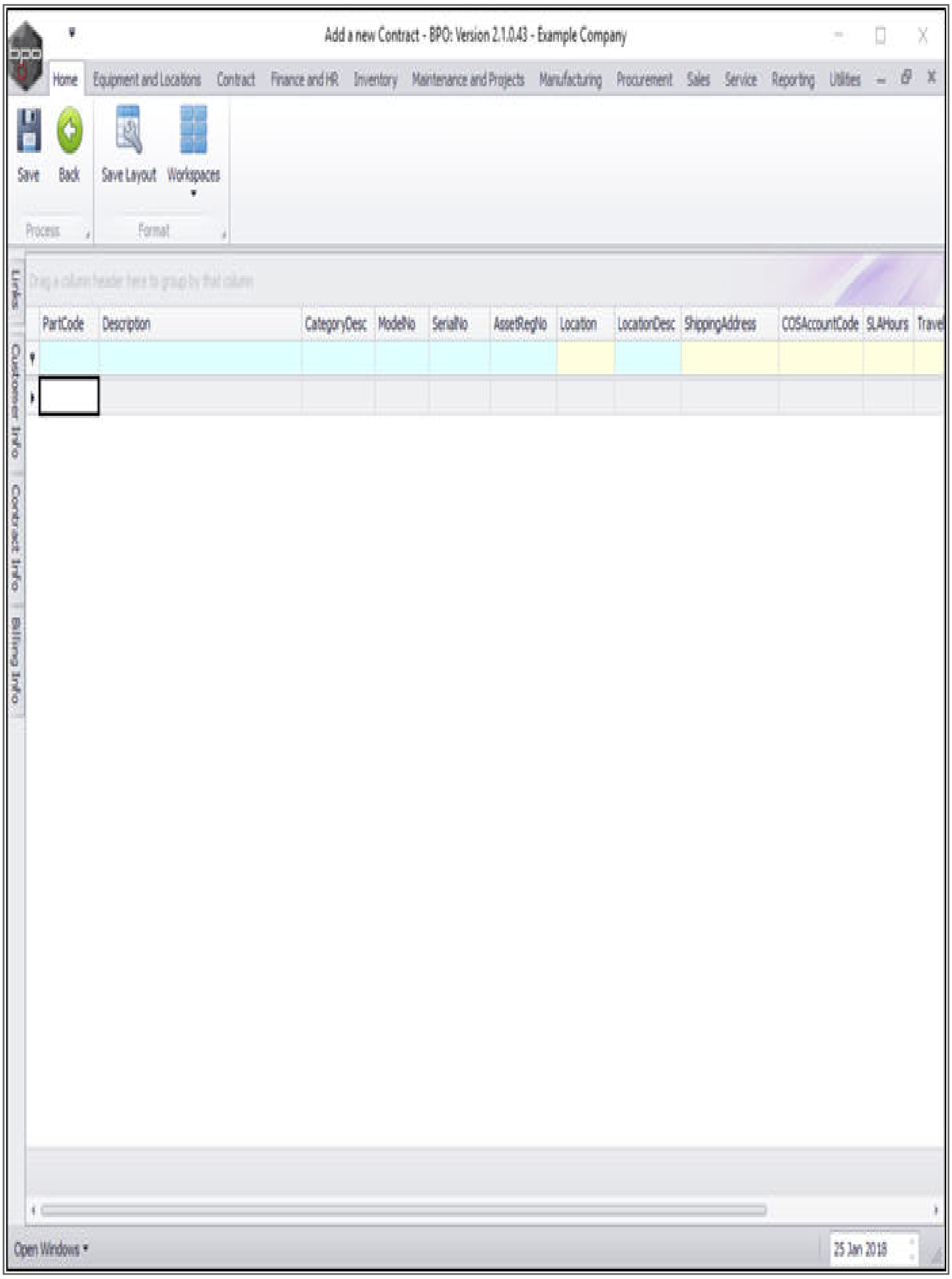
- When you have finished editing the Billing Info panel, you can ***hide (dock)*** the panel to make it easier to work in the ***Items*** frame.
- Click on the ***docking icon*** in the billing panel.



- The ***Customer Info***, ***Contract Info*** and ***Billing Info*** panels will now be reduced to ***tabs*** at the side of the screen.

CONTRACT PARTS FRAME

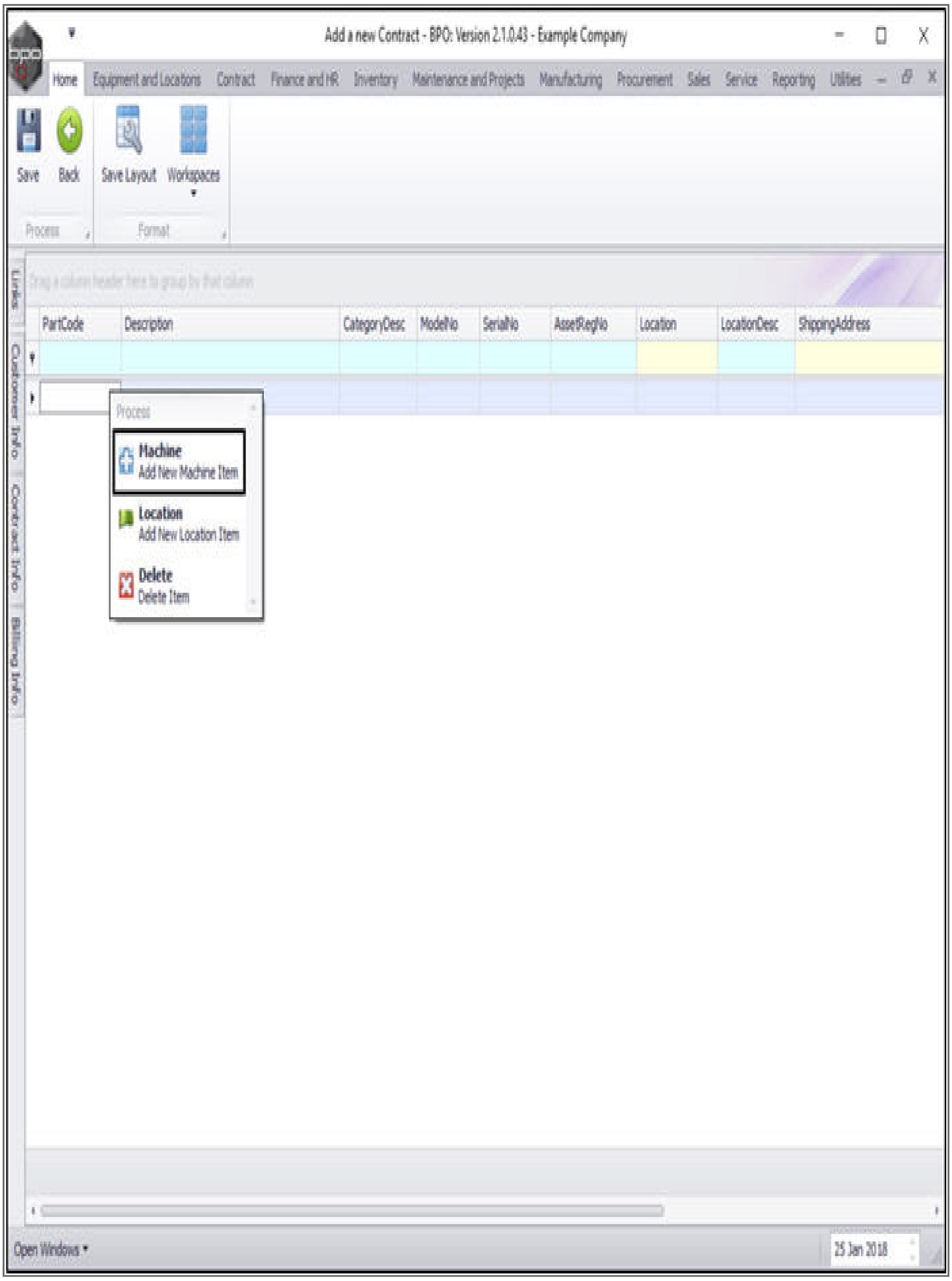
- ***Right click*** anywhere in the ***row*** of the ***Parts*** frame.



- A ***Process*** menu will pop up.

ADD MACHINE ITEM

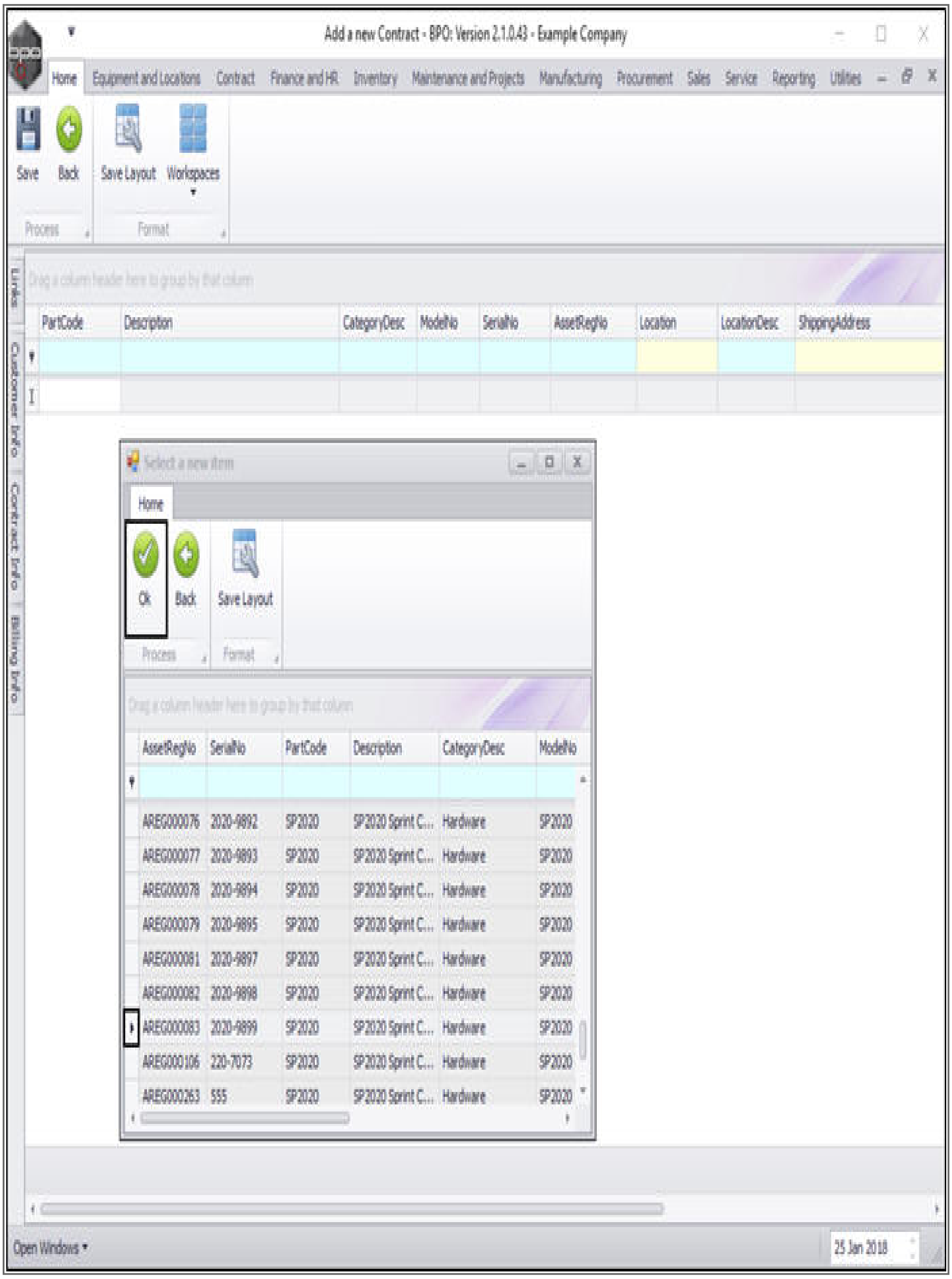
- Click on ***Machine*** - Add New Machine Item.



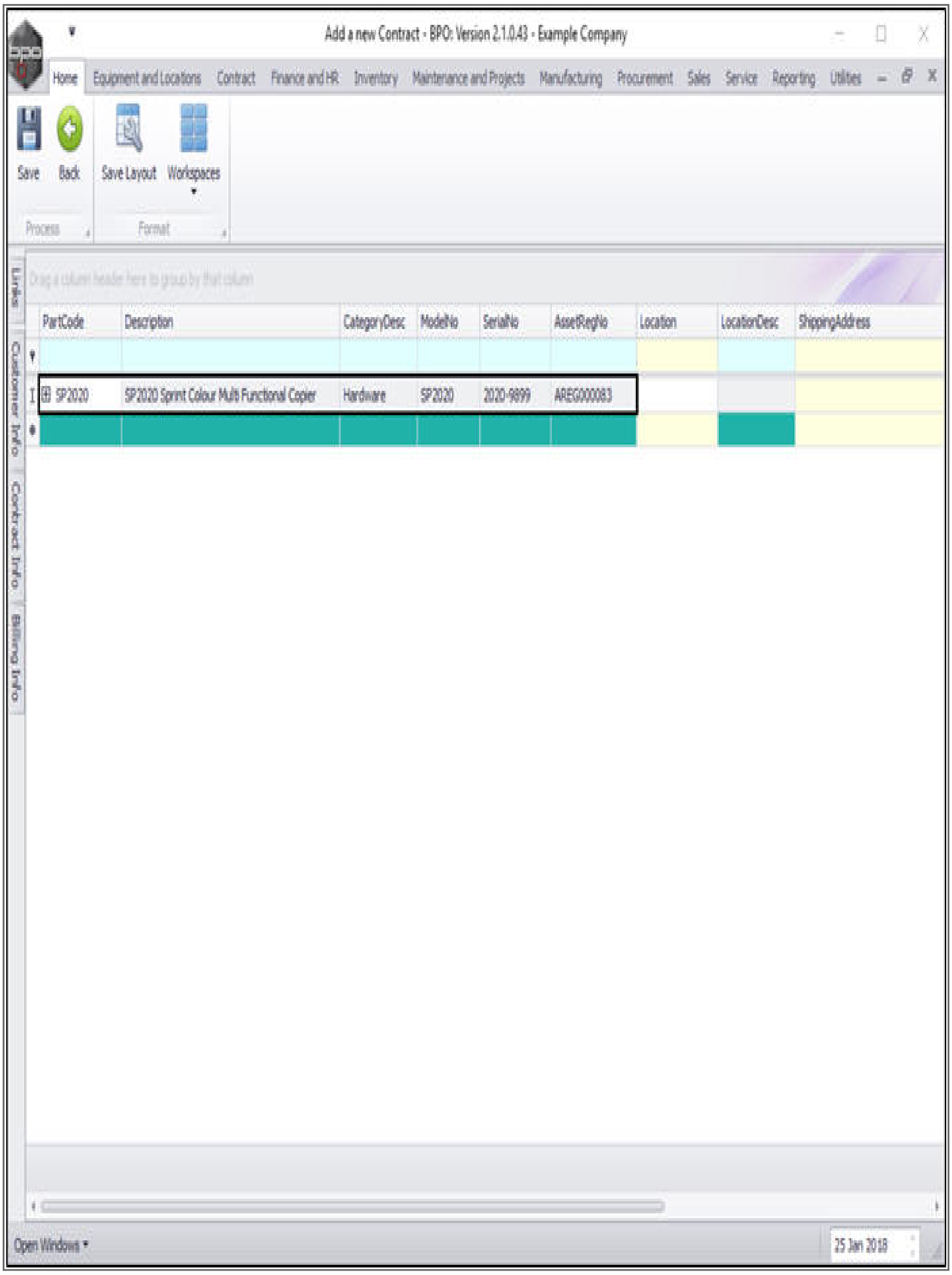
- The ***Select a new item*** pop up screen will appear.
- Click on the ***row selector*** in front of the ***machine*** that you wish to

link to this ***contract***.

- Click on ***Ok***.



- The following columns will auto populate according to your item selection:
    - **Part Code**
    - **Description**
    - **Category Description**
    - **Model No**
    - **Serial No**
    - **Asset Register No**


Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
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Maintenance and Projects
Manufacturing
Procurement
Sales
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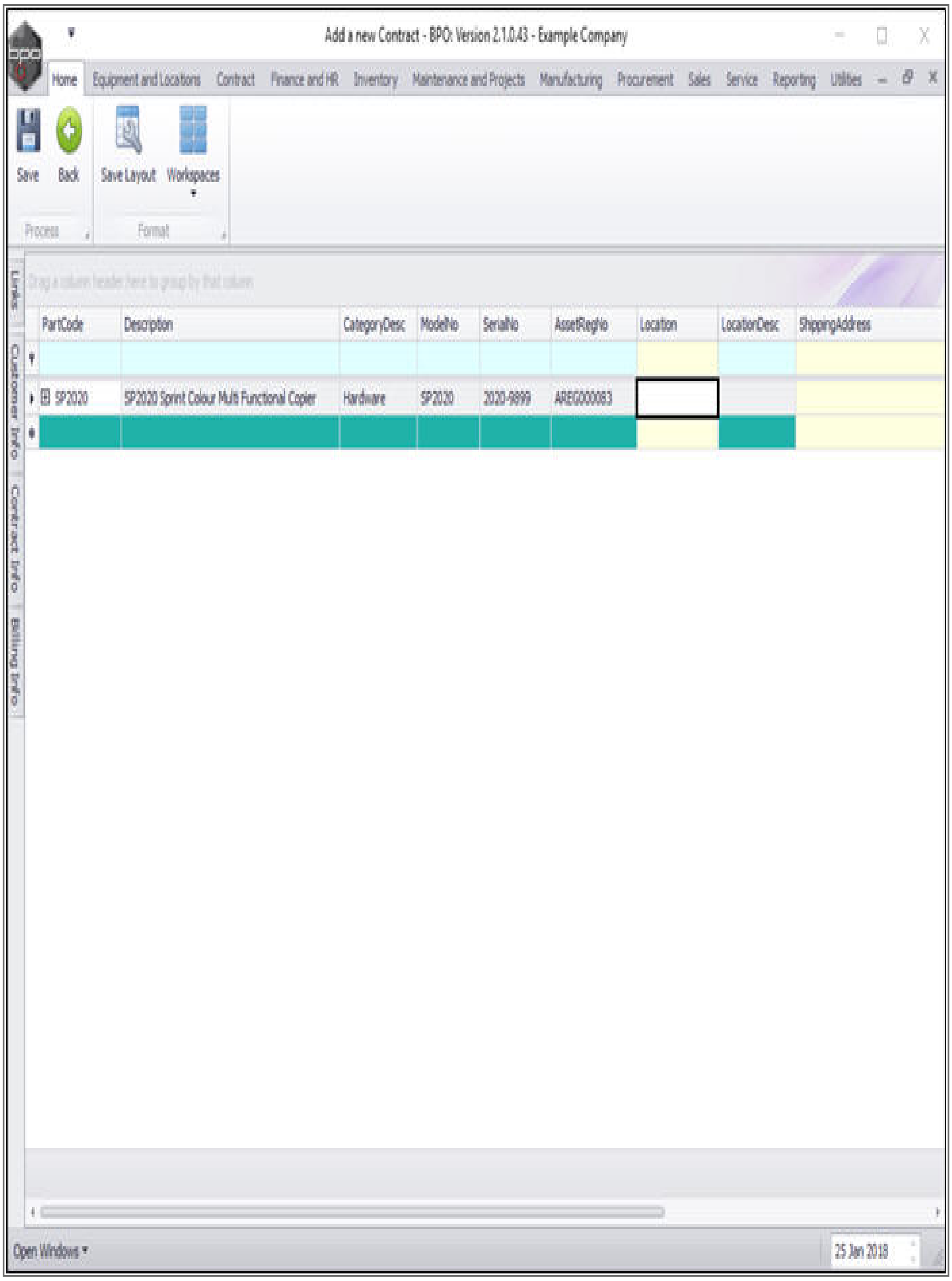
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Open Windows
25 Jan 2018

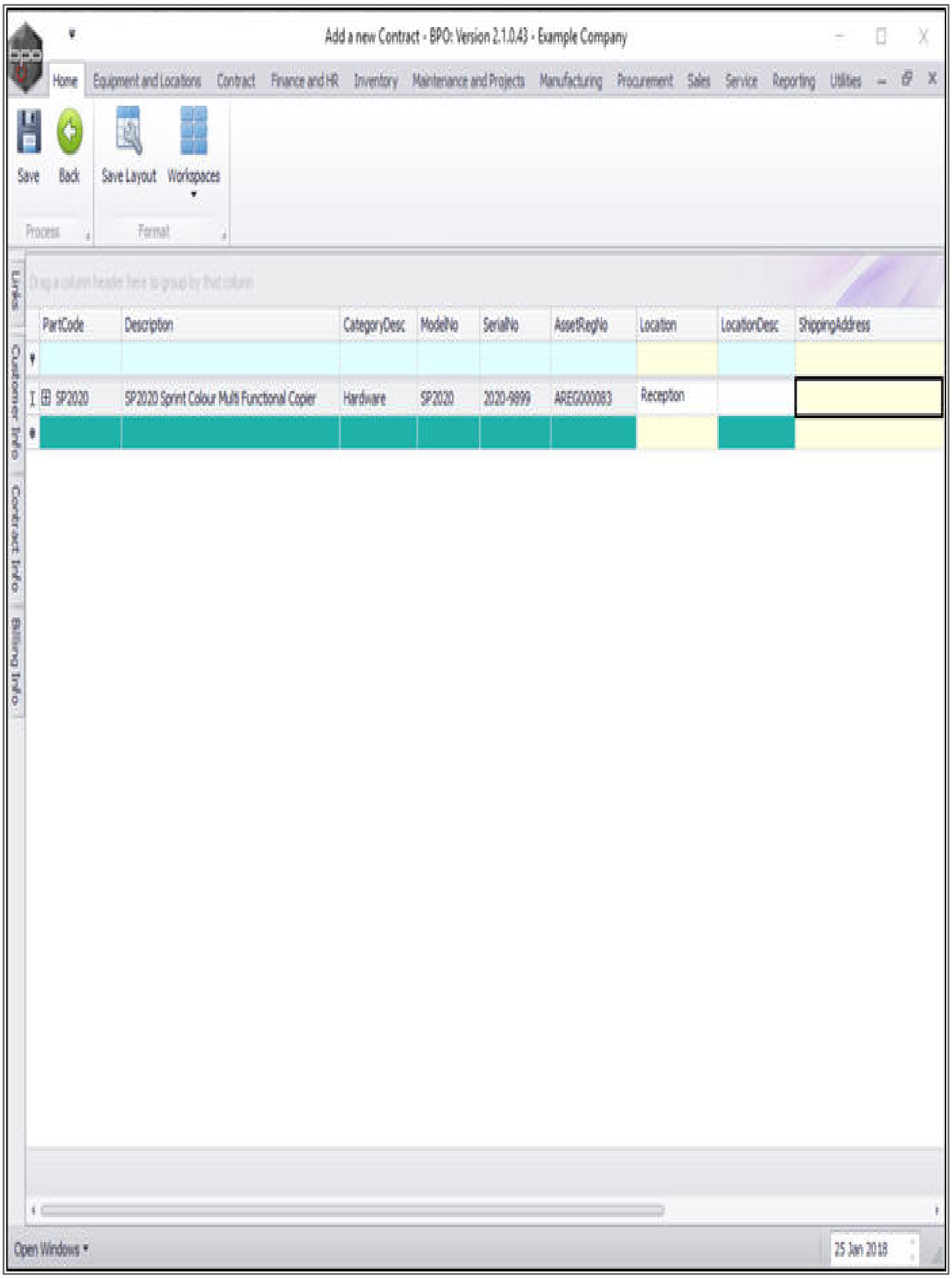
LINK LOCATION

- Click in the ***Location*** text box.
- Type in a ***location*** for this item.

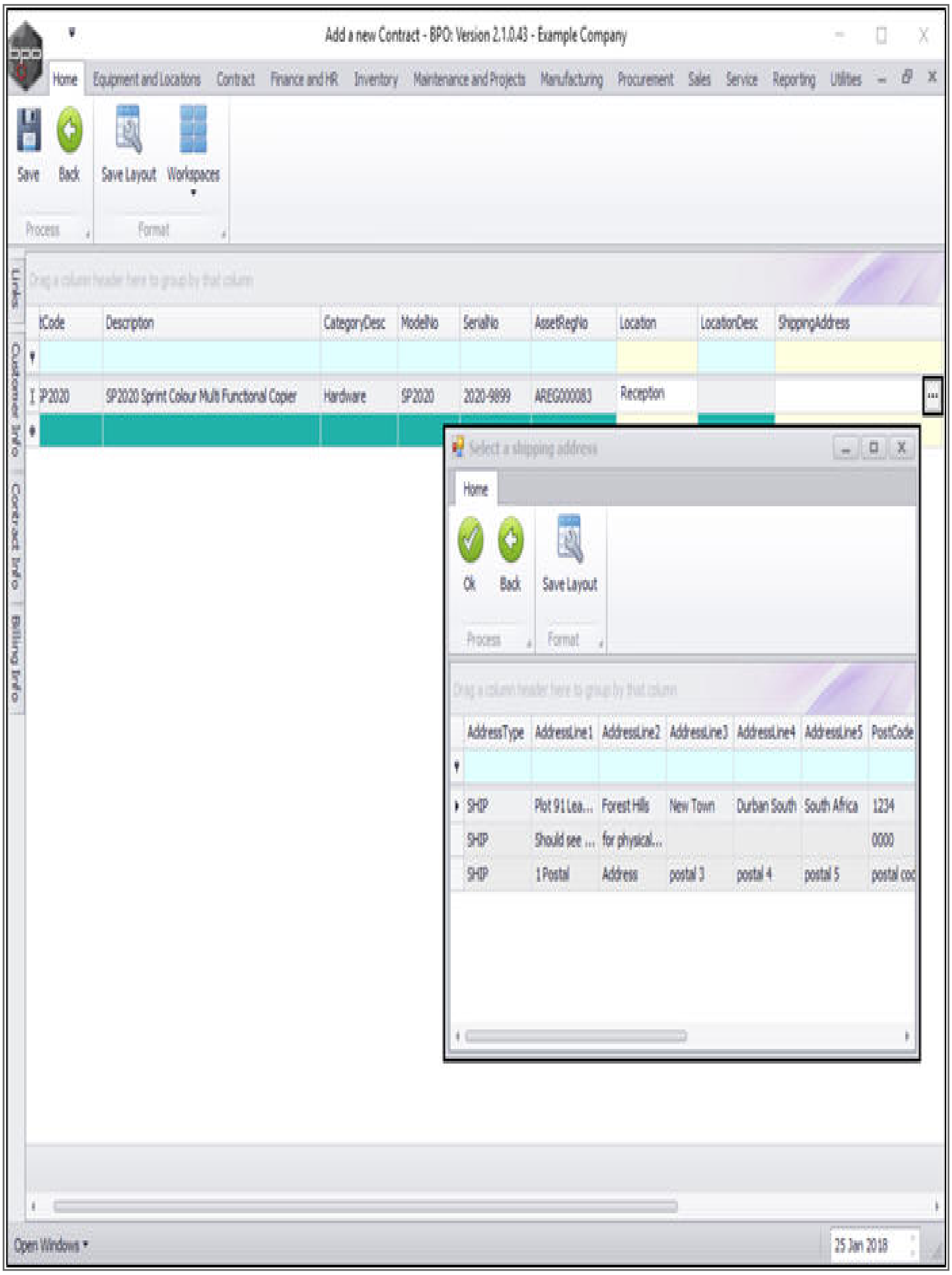


LINK SHIPPING ADDRESS

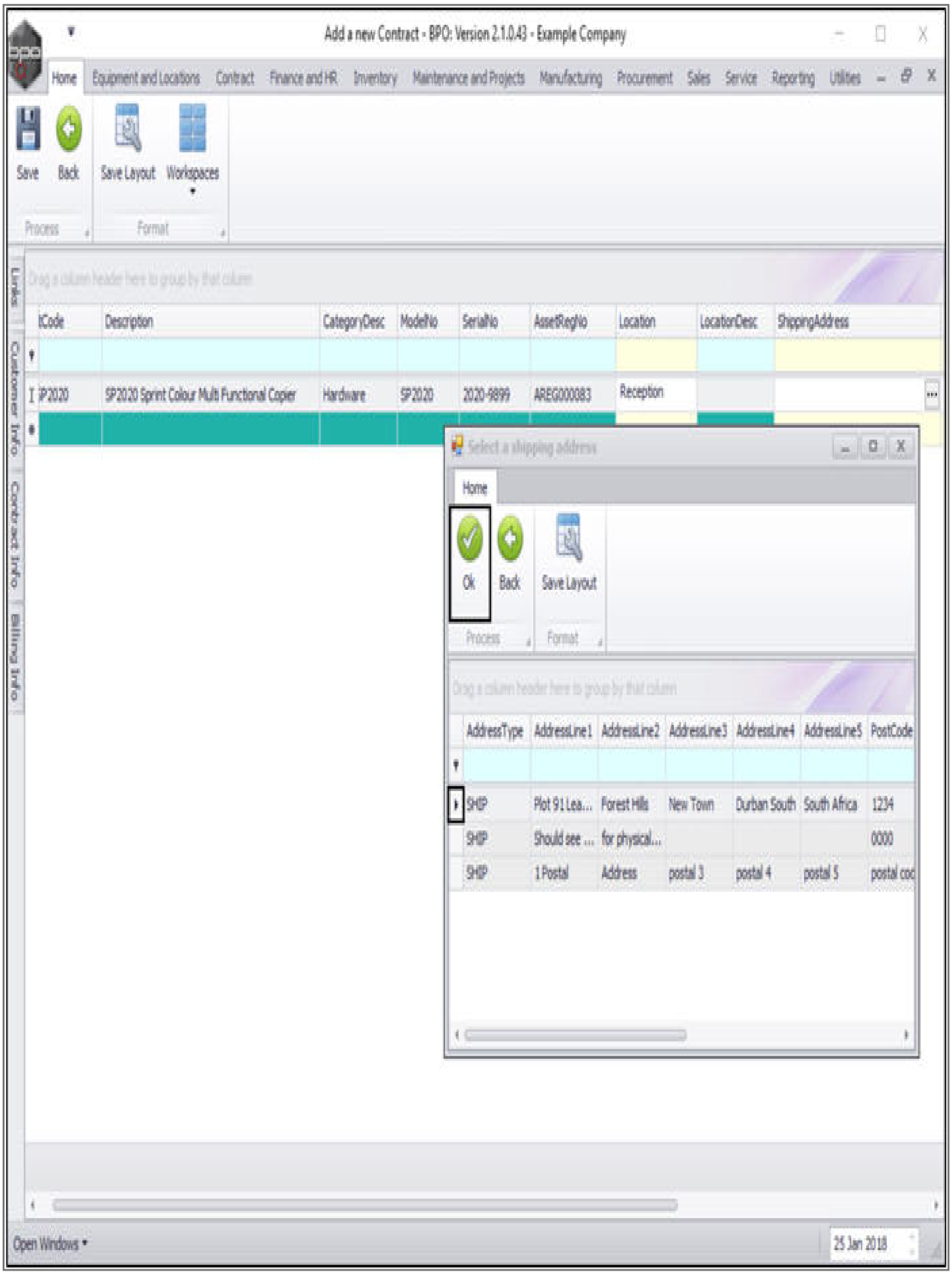
- Click in the ***Shipping Address*** text box.



- An ***ellipsis*** button will be revealed.
- Click on this button to display the ***Select a shipping address*** pop up screen.



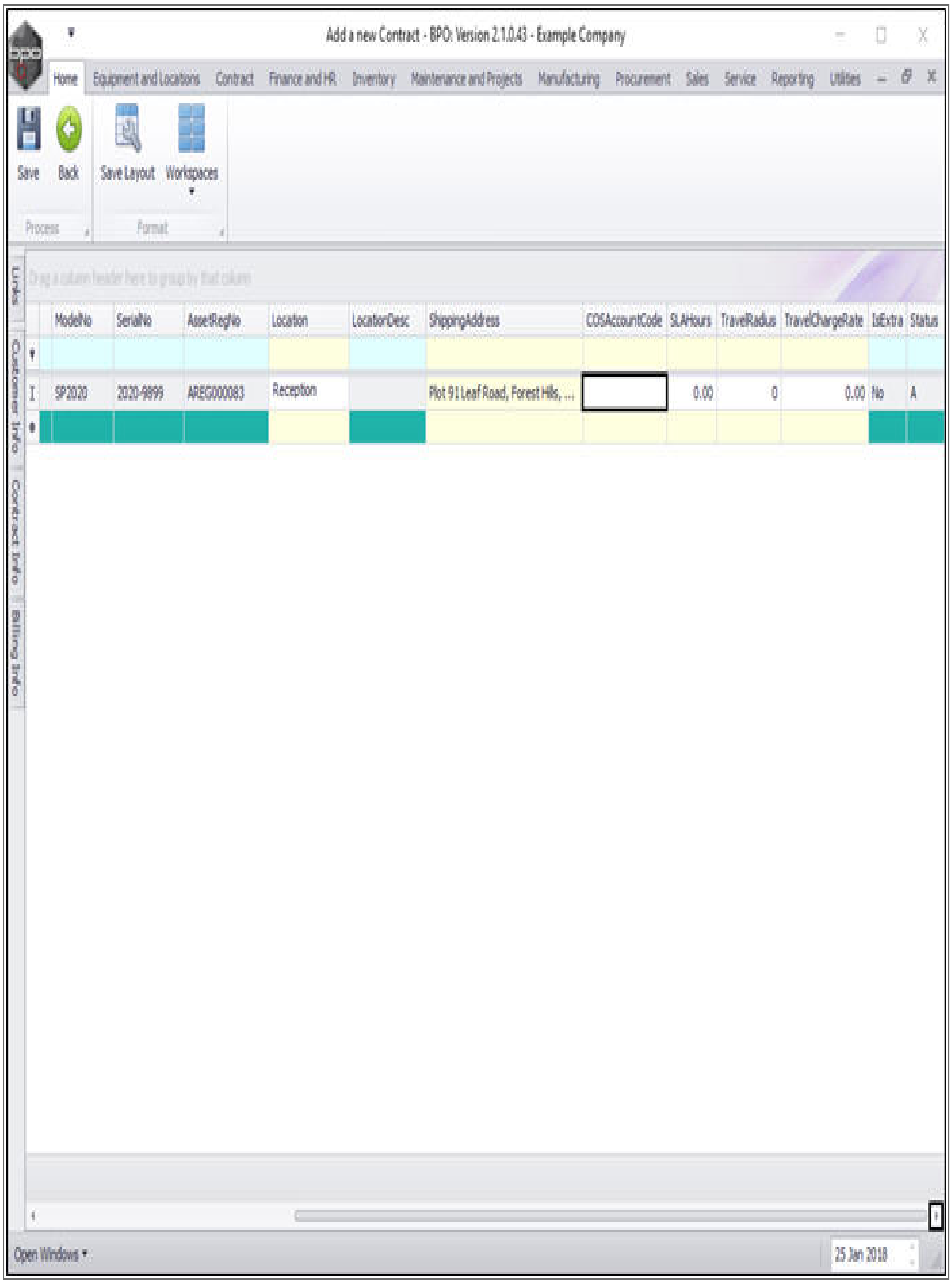
- Click on the ***row selector*** in front of the ***shipping address*** that you wish to ***link*** to this ***item***.
- Click on ***Ok***.



- ***Scroll right*** to view the remaining columns in the Items frame.

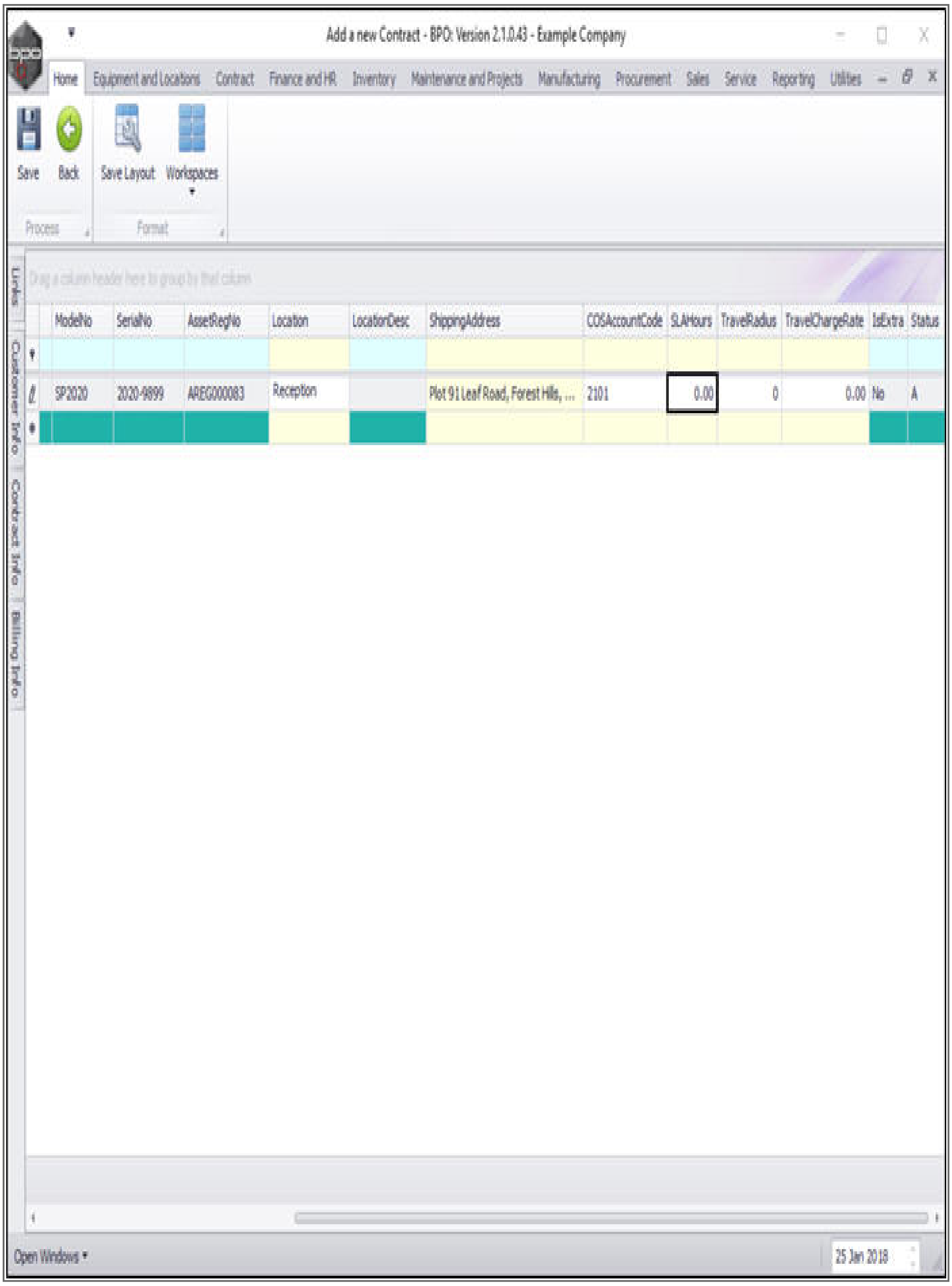
LINK COS ACCOUNT CODE

- Click in the ***COS Account Code*** text box.
- Type in the ***Cost of Sales account code*** to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).



LINK SLA HOURS

- Click in the ***SLA Hours*** text box.
- Type in or use the arrow indicators to select the required call response time (in hours).


Add a new Contract - BPO: Version 2.1.0.43 - Example Company
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Manufacturing
Procurement
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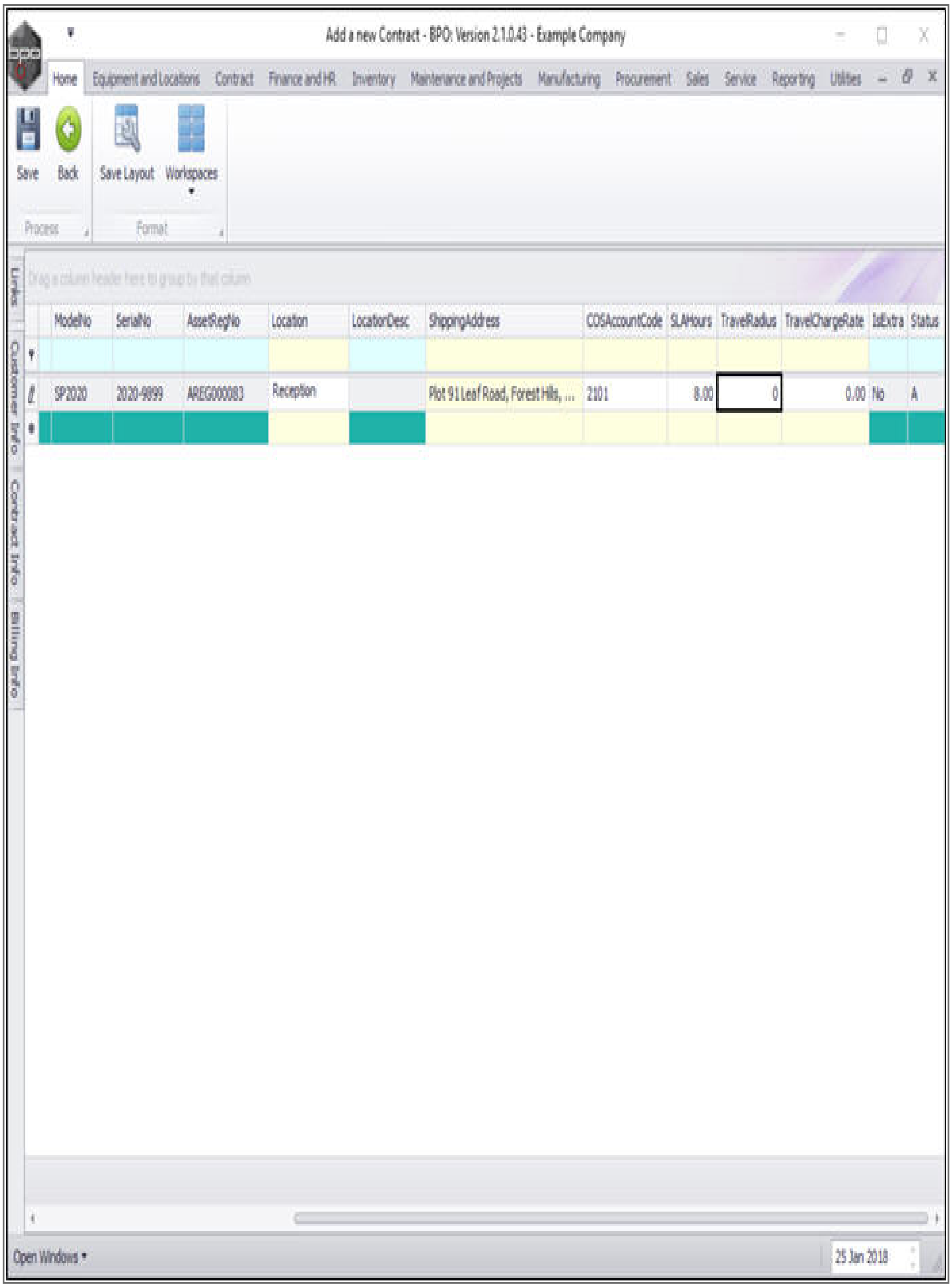
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
COSAccountCode
SLAHours
TravelRadius
TravelChargeRate
IsExtra
Status
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Forest Hills, ...
2101
0.00
0
0.00
No
A
Open Windows
25 Jan 2018

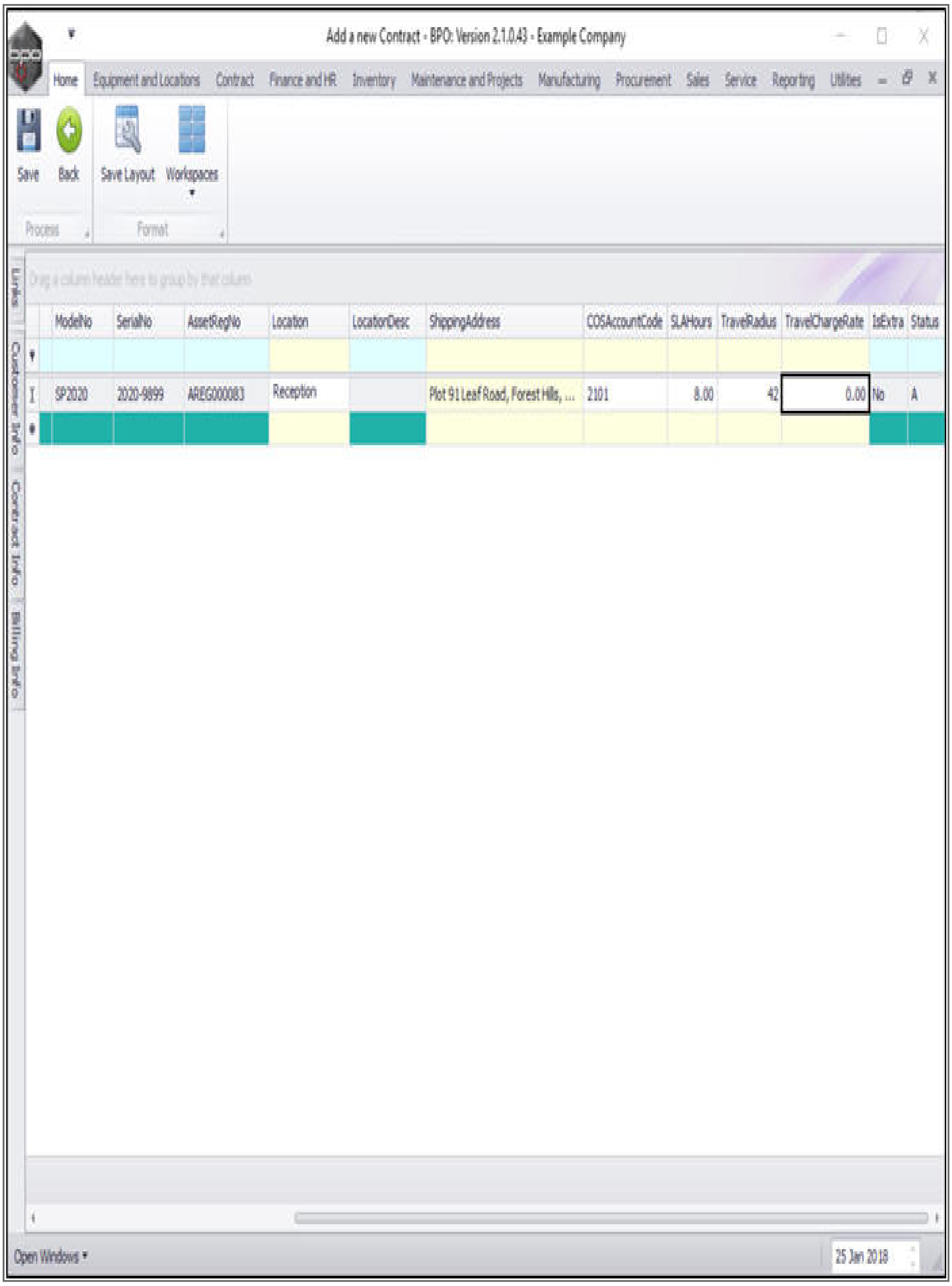
LINK TRAVEL RADIUS

- Click in the ***Travel Radius*** text box.
- Type in or use the arrow indicators to select the distance in km's to and from the client, if this travel is to be billed every time a call is logged. If travel is included, then set this to **0**.
  - **Note**: Travel can always be billed separately, if required.

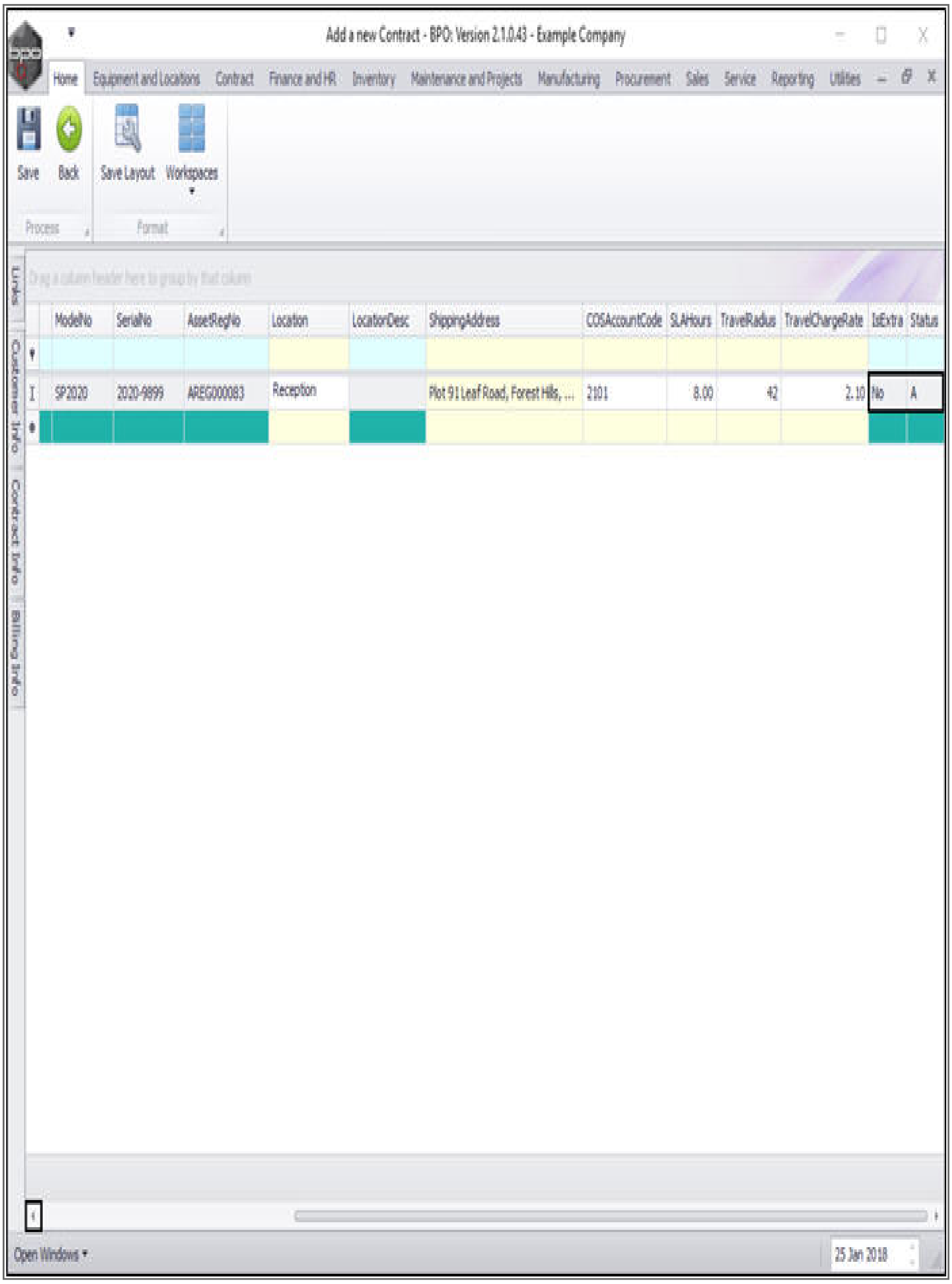


LINK TRAVEL CHARGE

- Click in the ***Travel Charge Rate*** text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g., Rand per kilometre).

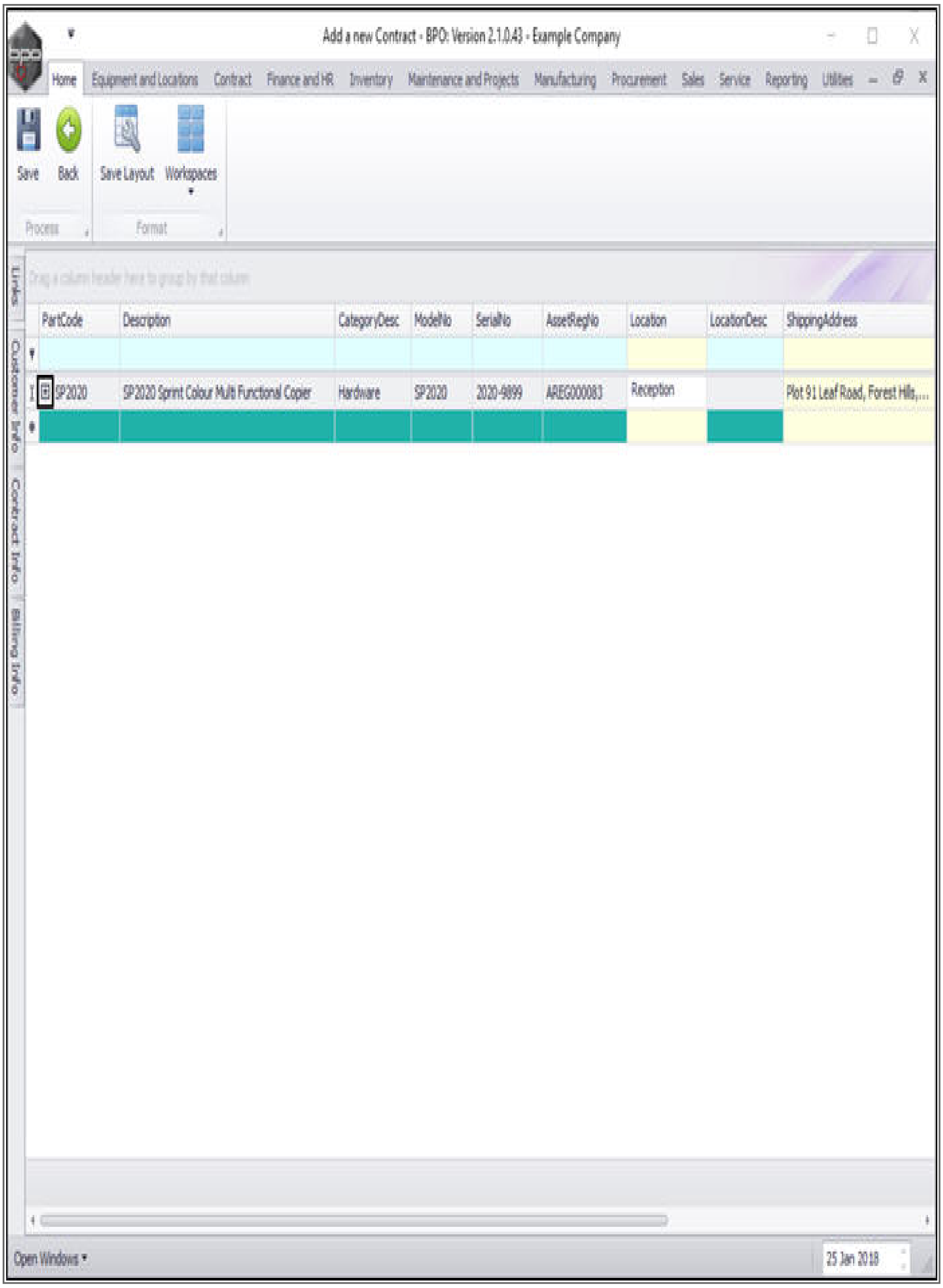


- The ***Is Extra*** and ***Status*** fields are static.
- ***Scroll left***, so that you can view the ***Part Code*** column again.



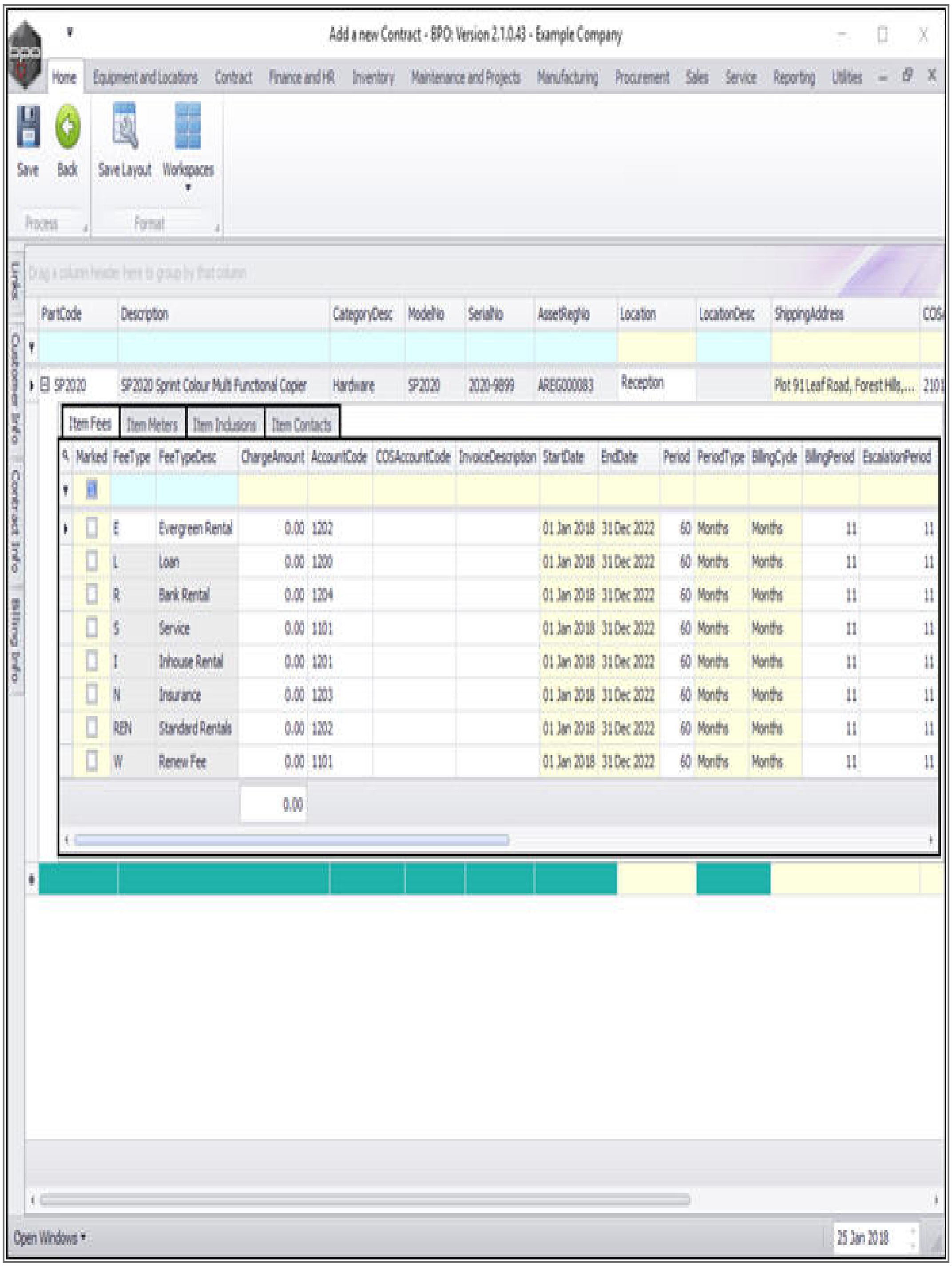
ITEMS FRAME

- Click on the ***expand*** button in the ***Part Code*** text box.



- The selected machine's ***Item*** frame will be expanded.
- Here you can click on 4 different tabs to add or edit:

- **Item Fees:** monthly charges
- **Item Meters:** meter usage charges
- **Item Inclusions:** items not to bill
- **Item Contacts:** the contact person - per machine.



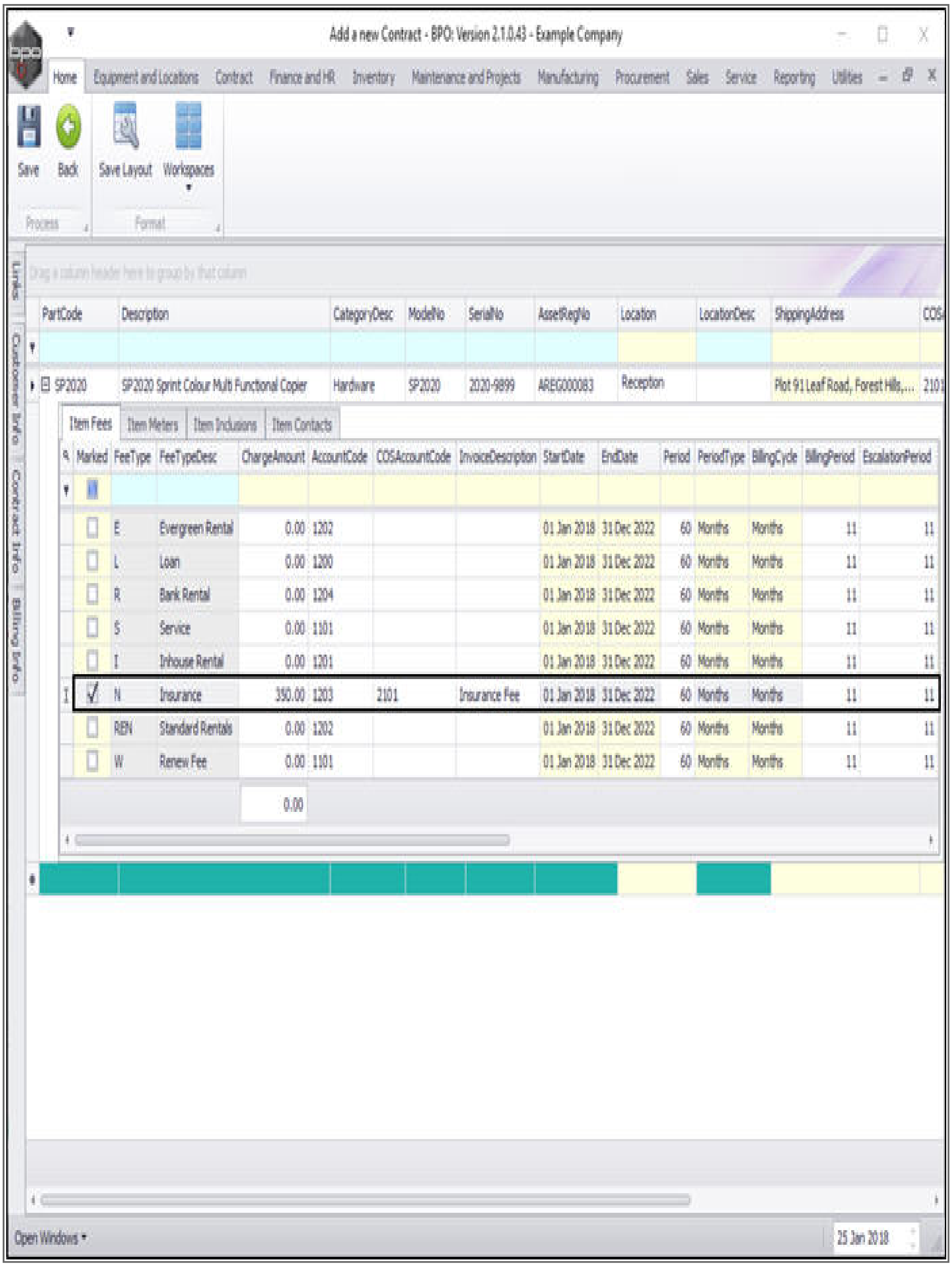
ITEM FEES FRAME

The ***Item Fees*** frame displays ***Contract Item Fees*** that have been set up.

Add Item Fee

- **Marked:** Click on the check box in this column in front of the ***Fee Type*** and ***Fee Description*** to be charged
    - In this image **N** Insurance has been selected as an example.
- **Charge Amount:** Type in or use the arrow indicators to select the fee amount.
- **Account Code:** This will auto populate with the account code linked to this fee item.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.
- **Invoice Description:** Type in the description to be used for this fee on the invoice.
- **Start Date and End Date:** These will auto populate according to the contract start date and end date selected in the Contract Info panel. You can click on the drop-down arrow and use the calendar function to select an alternative start and end date if required.
    - **Note**: Take note that the contract fee will only bill from the start date, and will stop billing at the end date.
- **Period & Period Type:** These fields will auto populate according to the contract start and end date recorded in the Contract Info panel. You can click on the text boxes and either type in or use the drop-down arrows to select an alternative period and period type if required.

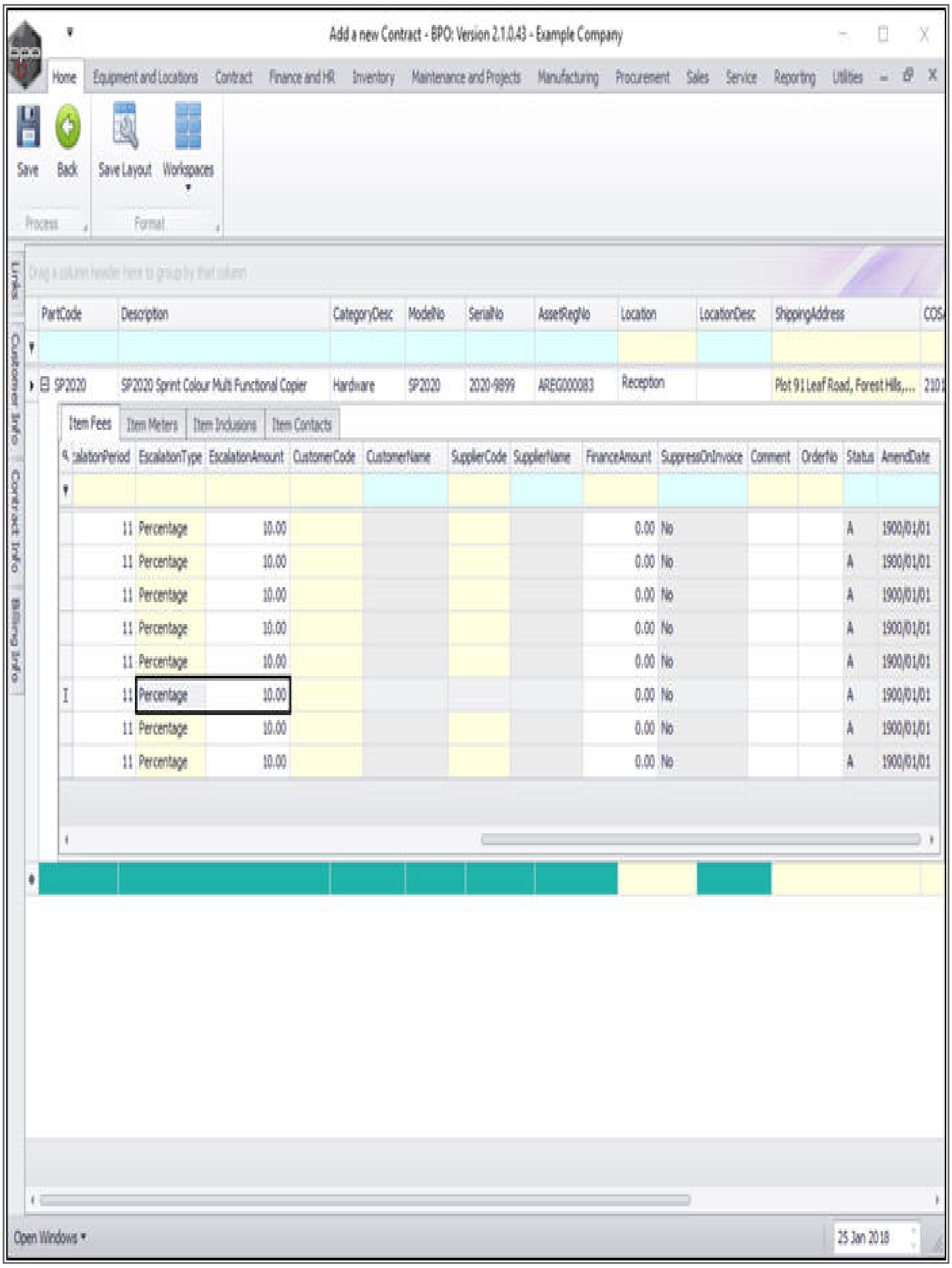
- **Billing Cycle:** This will auto populate according to the contract billing cycle recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing cycle if required.
- **Billing Period:** This will auto populate according to the contract billing period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing period if required.
- **Escalation Period:** This will auto populate according to the escalation period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative escalation period if required.



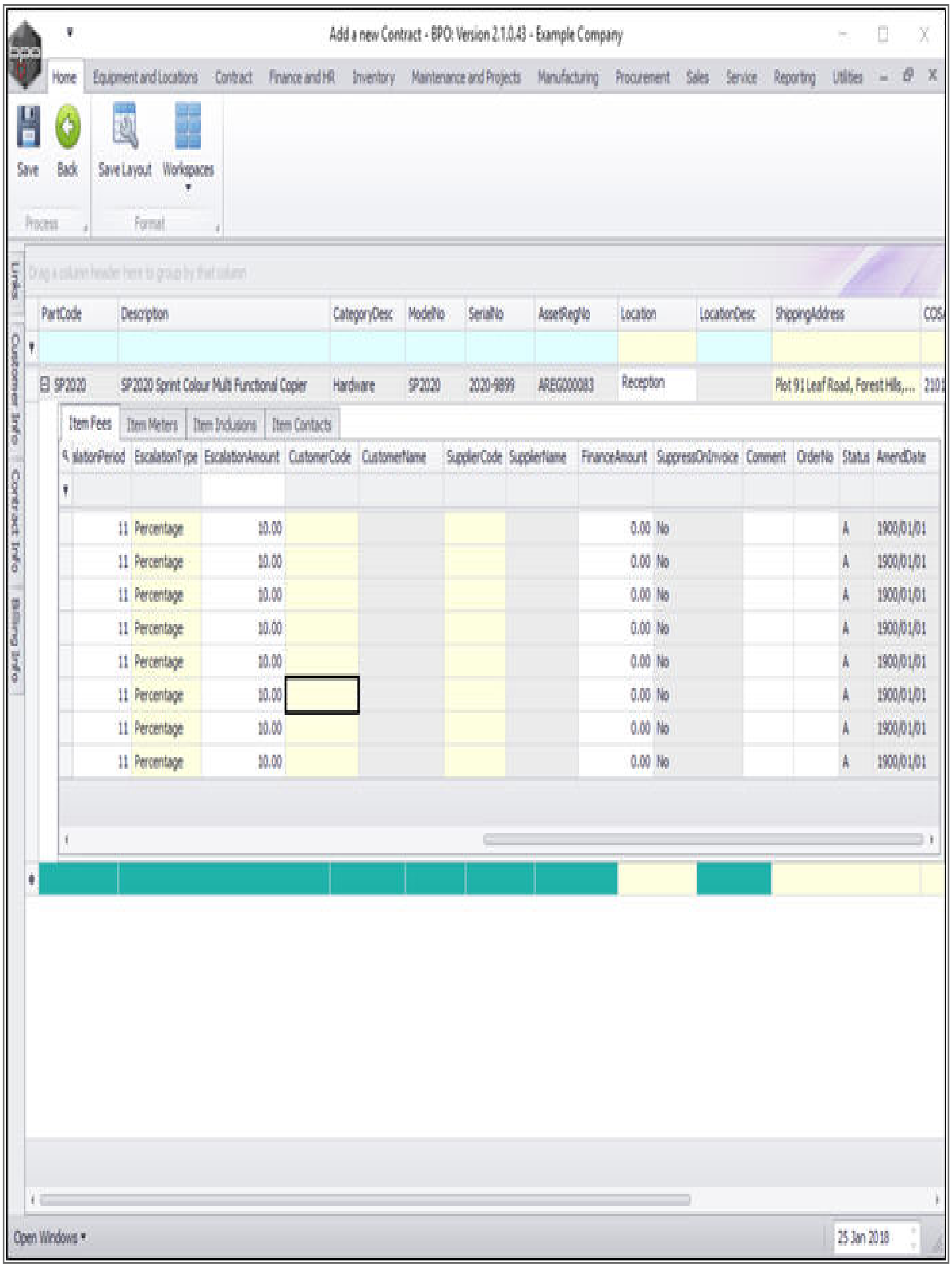
Scroll right to view the remaining columns in this frame.

- **Escalation Type:** This will auto populate according to the escalation type recorded in the Billing Info panel. You can click on the drop-down arrow in the text box to select an alternative escalation type if required.

- **Escalation Amount:** This will auto populate according to the escalation amount recorded in the Billing Info panel. You can click on the text box and either type in or use the arrow indicators to select an alternative escalation amount if required.



- **Customer Code:**
    - Click in the ***Customer Code*** text box.


Add a new Contract - BPO: Version 2.1.0.43 - Example Company
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Maintenance and Projects
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Procurement
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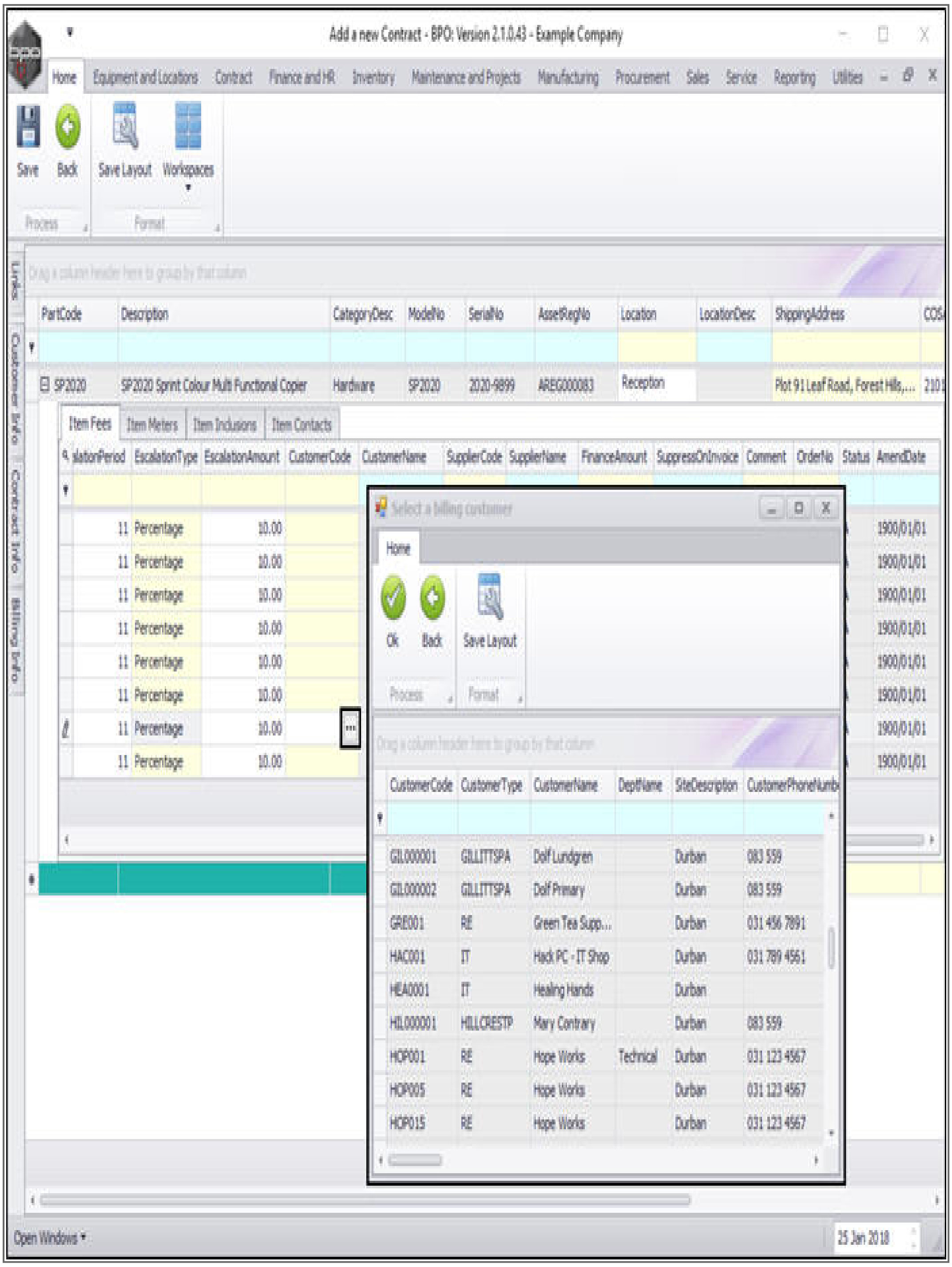
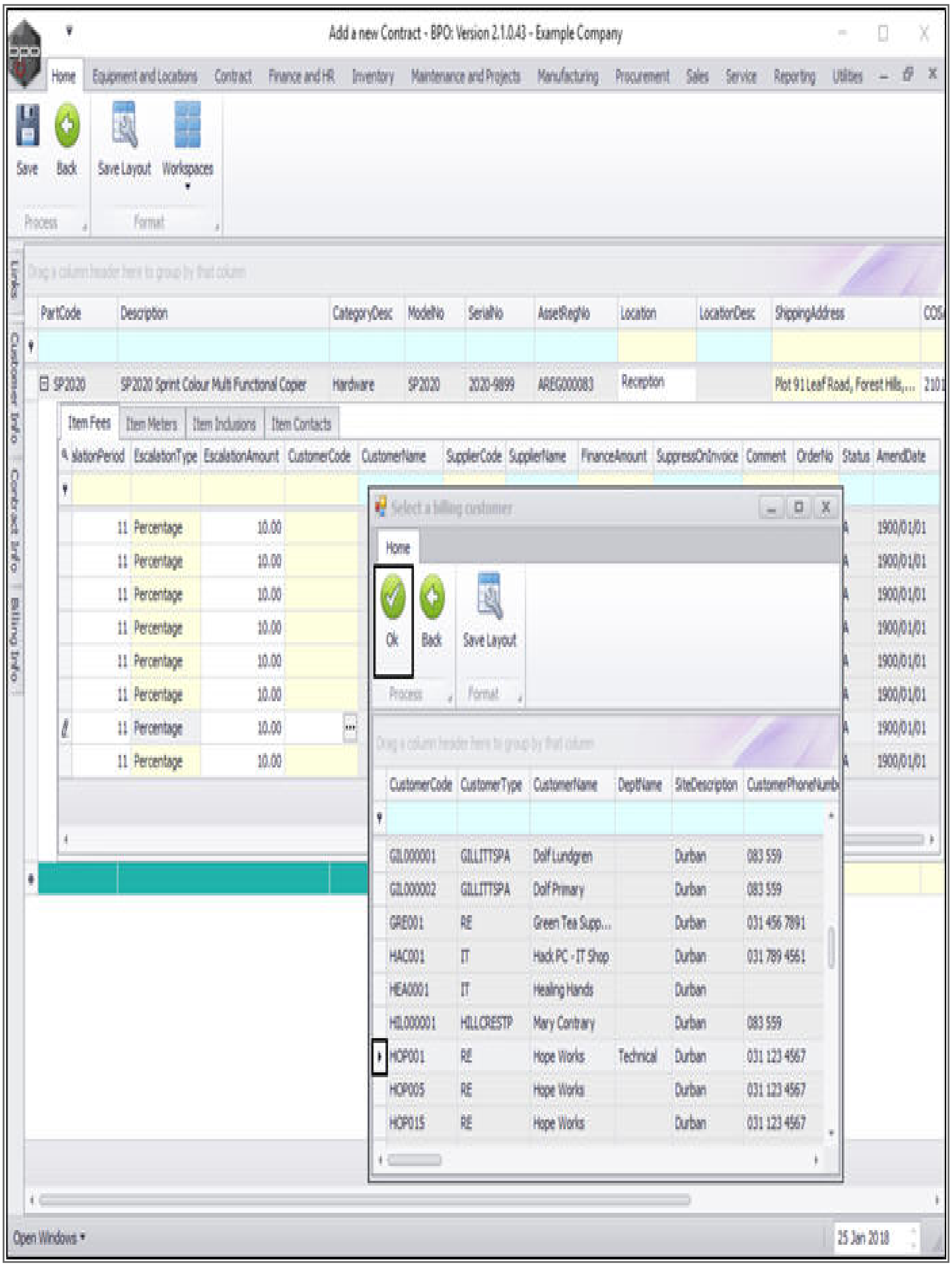
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Forest Hills,...
Item Fees
Item Meters
Item Inclusions
Item Contacts
EscalationType
EscalationAmount
CustomerCode
CustomerName
SupplierCode
SupplierName
FinanceAmount
SuppressOnInvoice
Comment
OrderNo
Status
AmendDate
11
Percentage
10.00
0.00
No
A
1900/01/01
Open Windows
25 Jan 2018

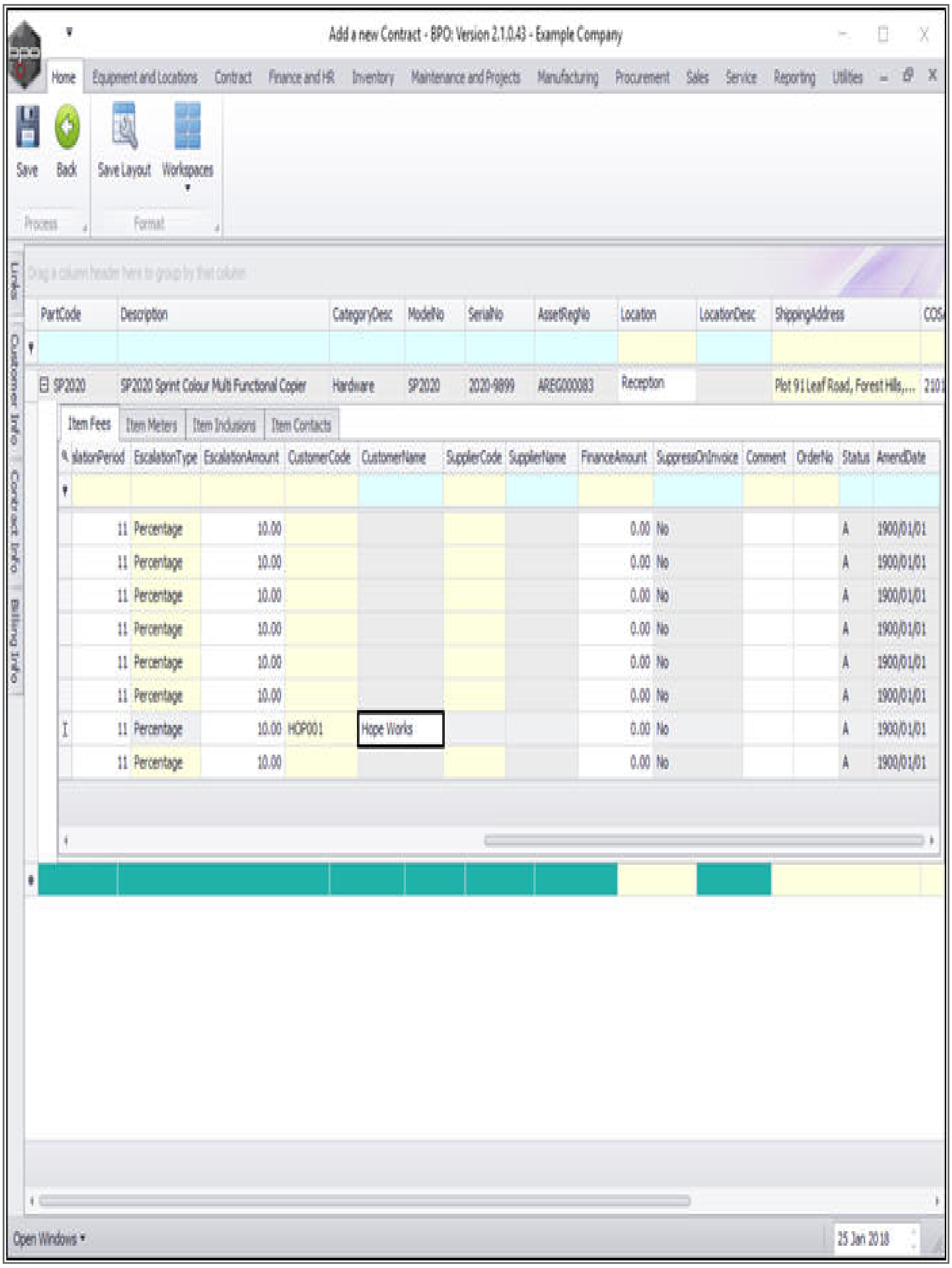
- **Customer Code:**
  - An ***ellipsis*** button will be revealed.
  - Click on this button to display the ***Select a billing customer*** pop up screen.



- **Customer Code:**
  - Select the ***row*** of the ***Billing Customer*** to whom you wish to ***link*** this ***contract***.
  - Click on ***Ok***.

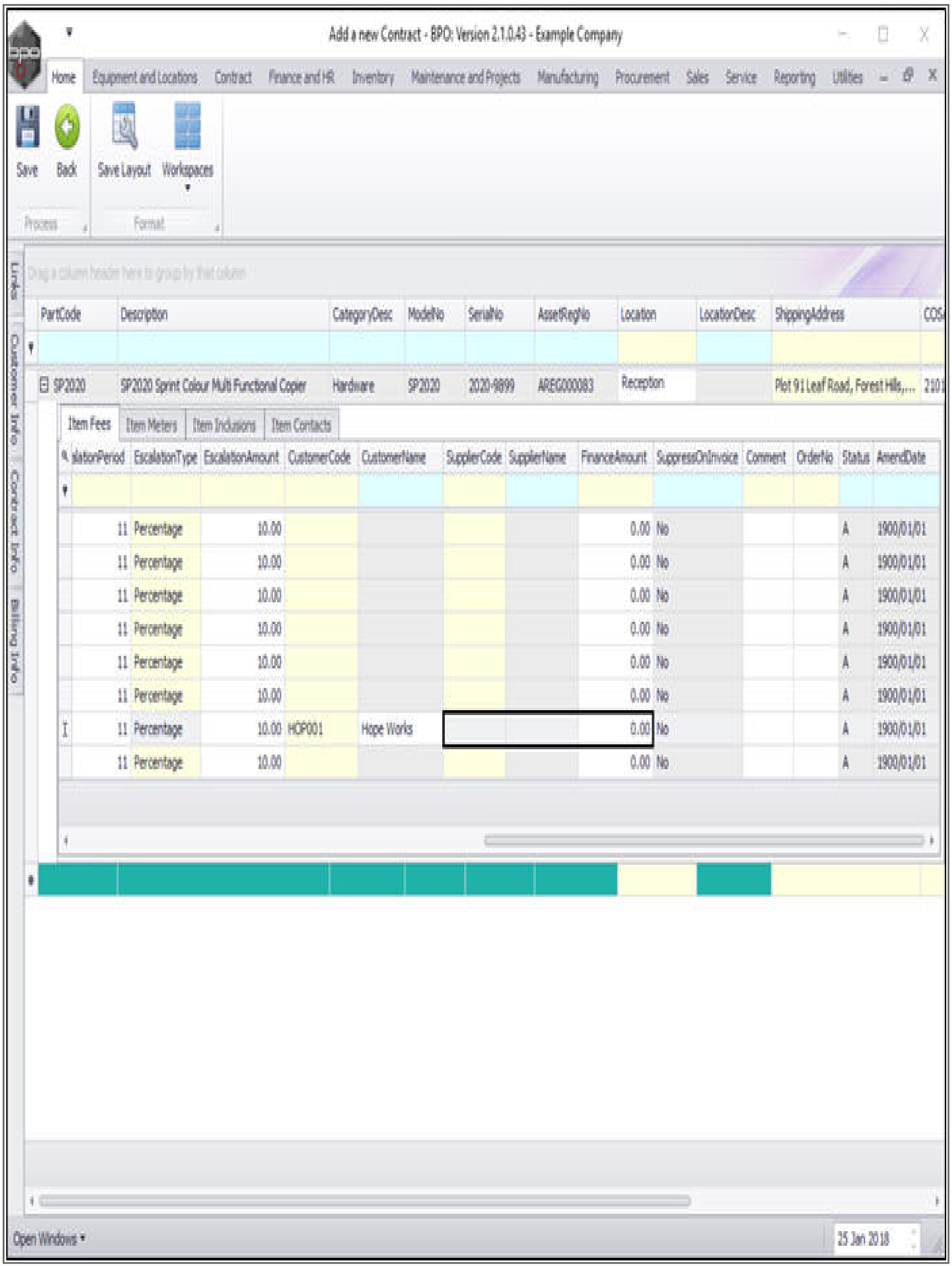


- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.
  - **Note**: If the customer details are left blank, the system will bill the main customer linked to the contract.



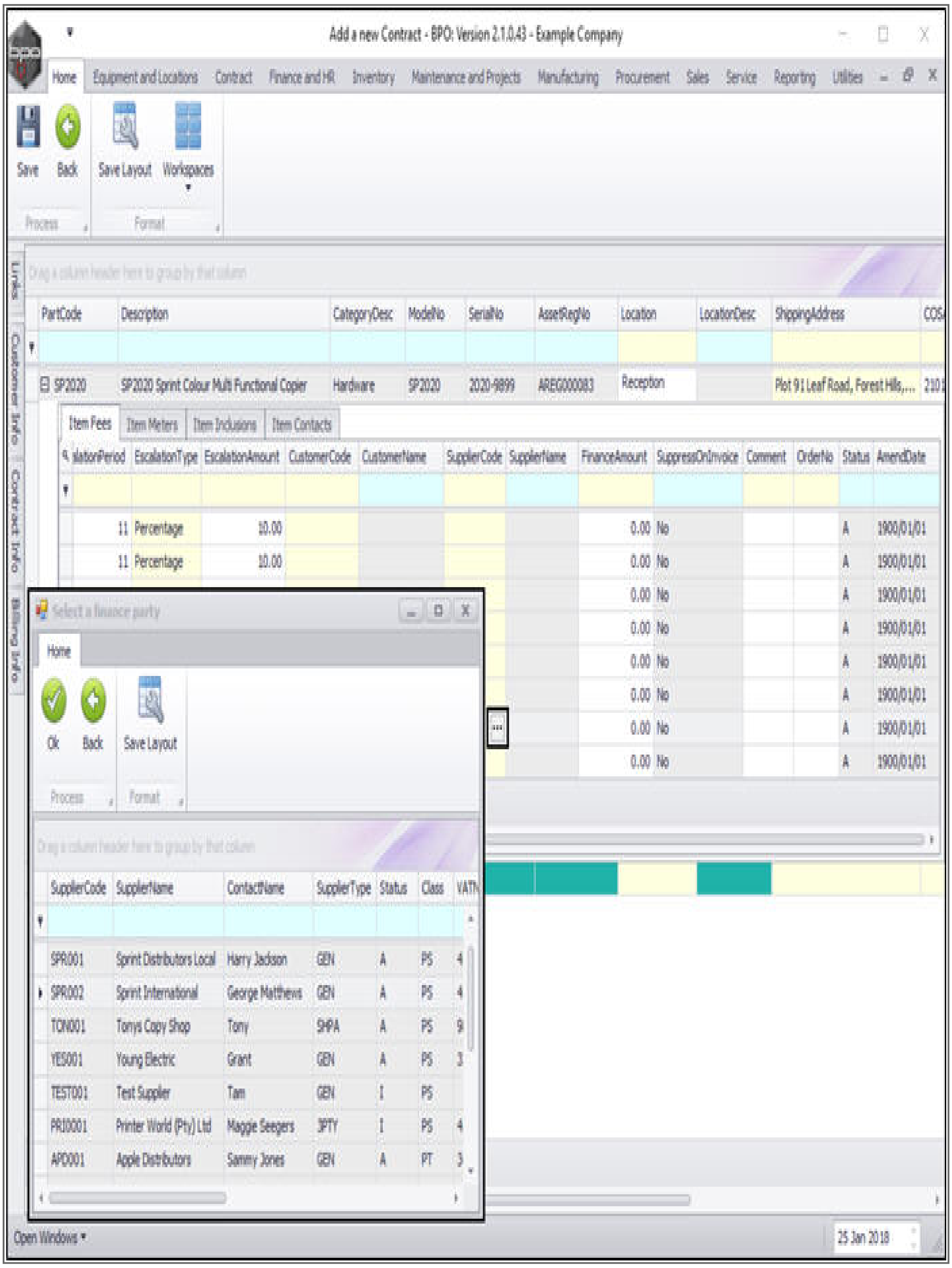
- **Supplier Code / Supplier Name / Finance Amount**
    - Follow the next 5 screen shots only if you wish to link

a supplier for rental back-to-backs (finance house bills company & company bills client).

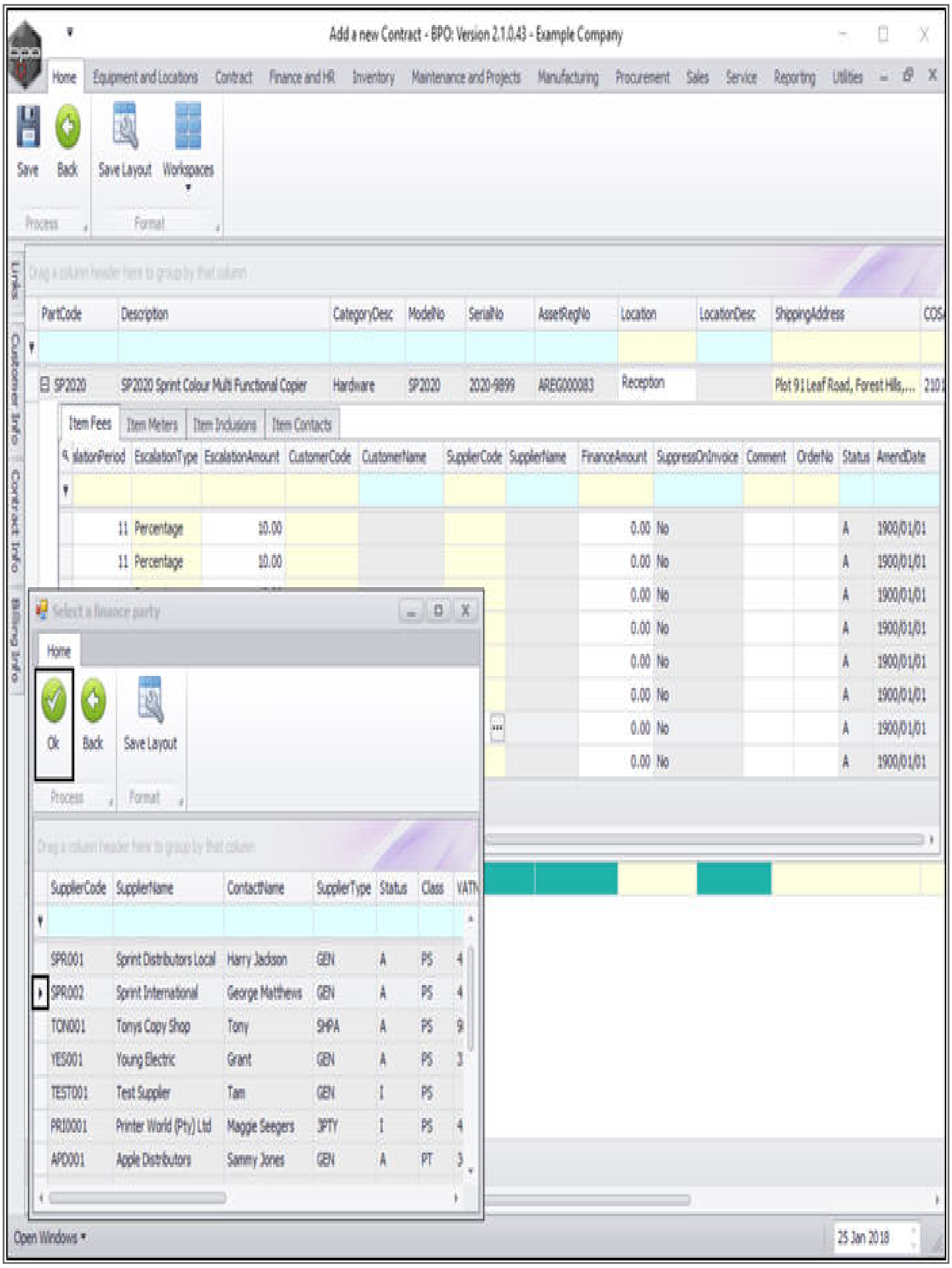


- **Supplier Code:**

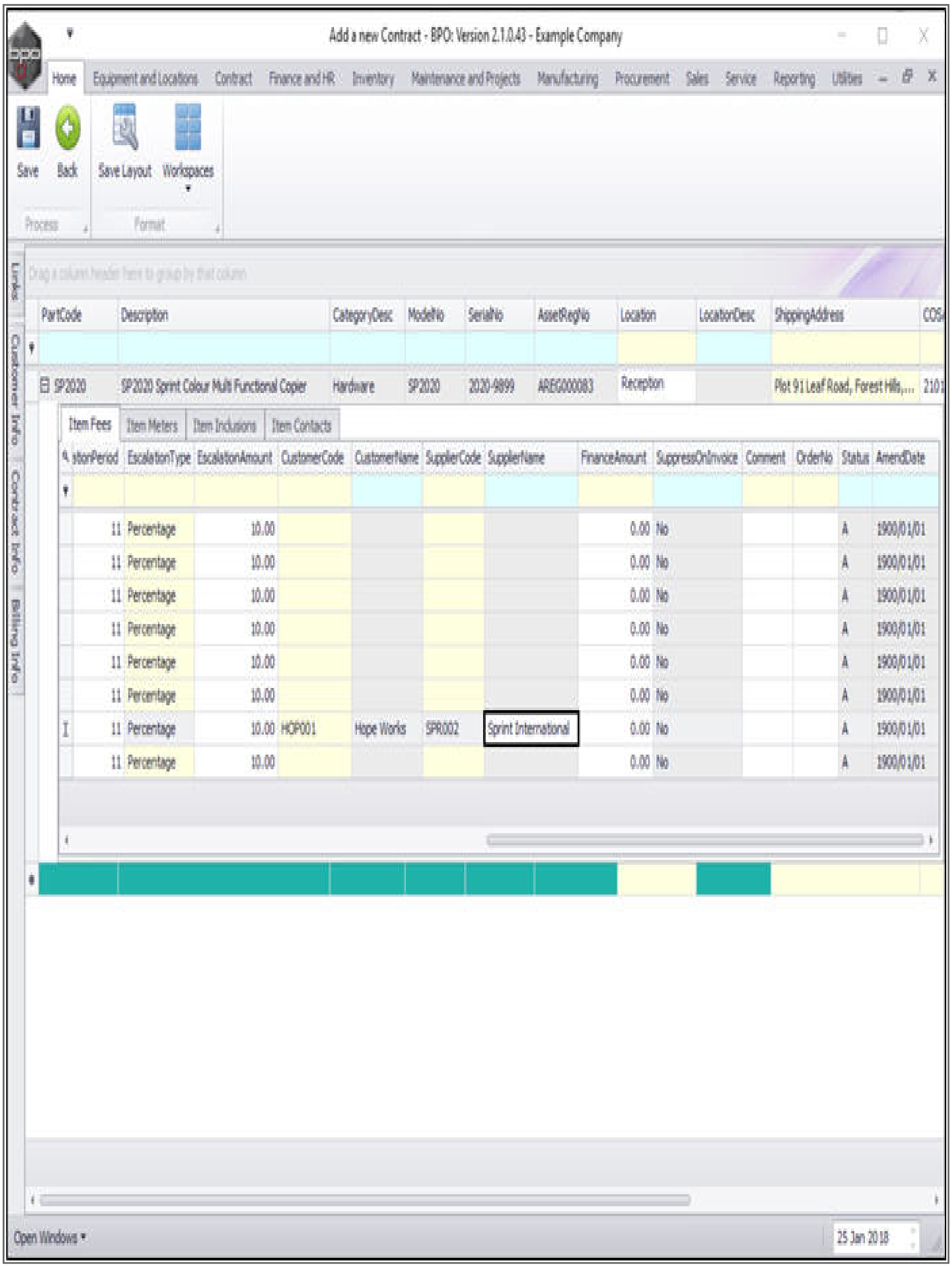
- Click on the ***Supplier Code*** text box to reveal an ***ellipsis*** button.
- Click on this button to display the ***Select a finance party*** pop up screen



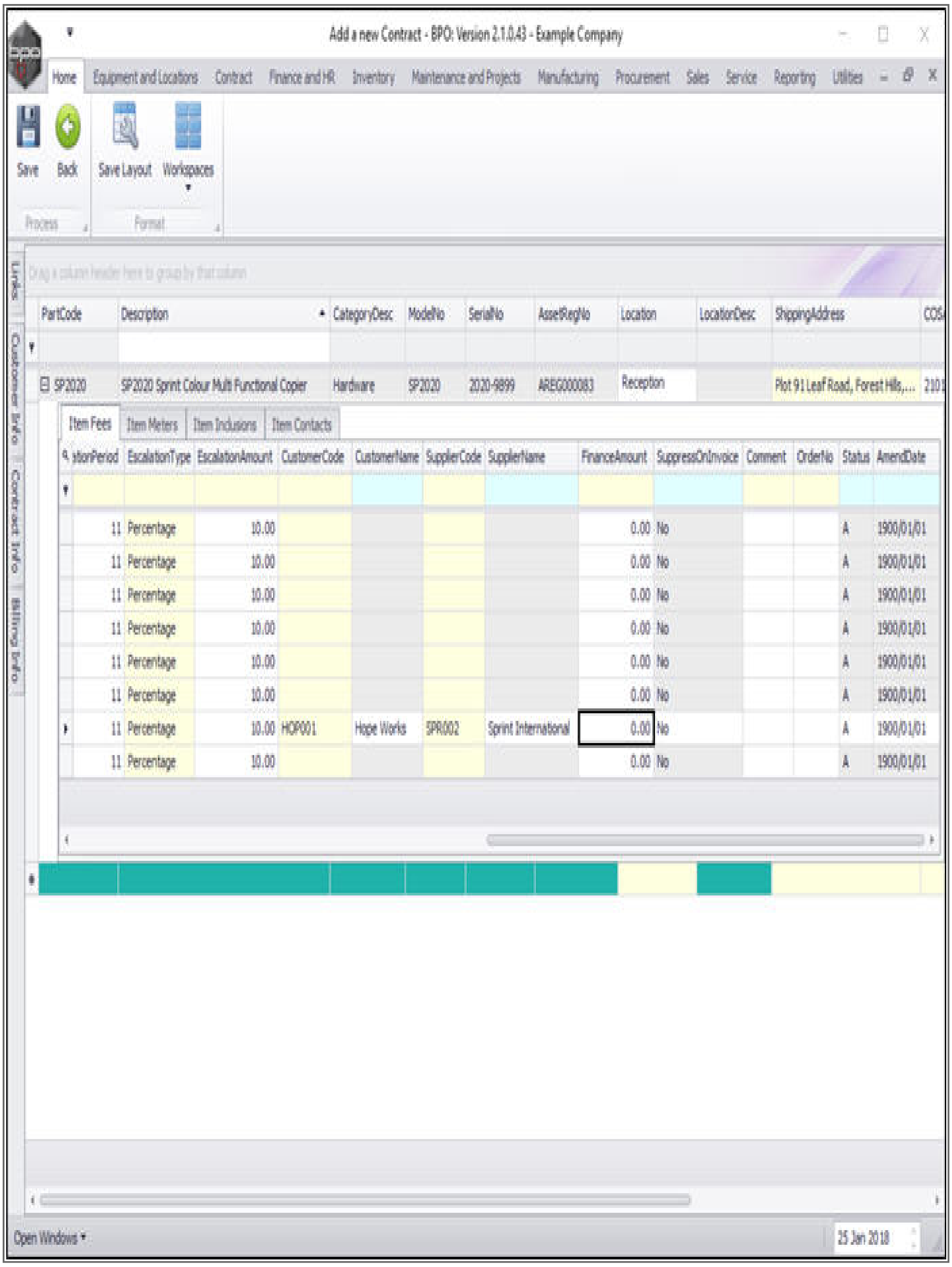
- **Supplier Code:**
    - Select the ***row*** of the ***Supplier*** that you wish to ***link*** to this ***item***.
    - Click on ***Ok***.



- **Supplier Name:** This will auto populate once the supplier code has been selected.



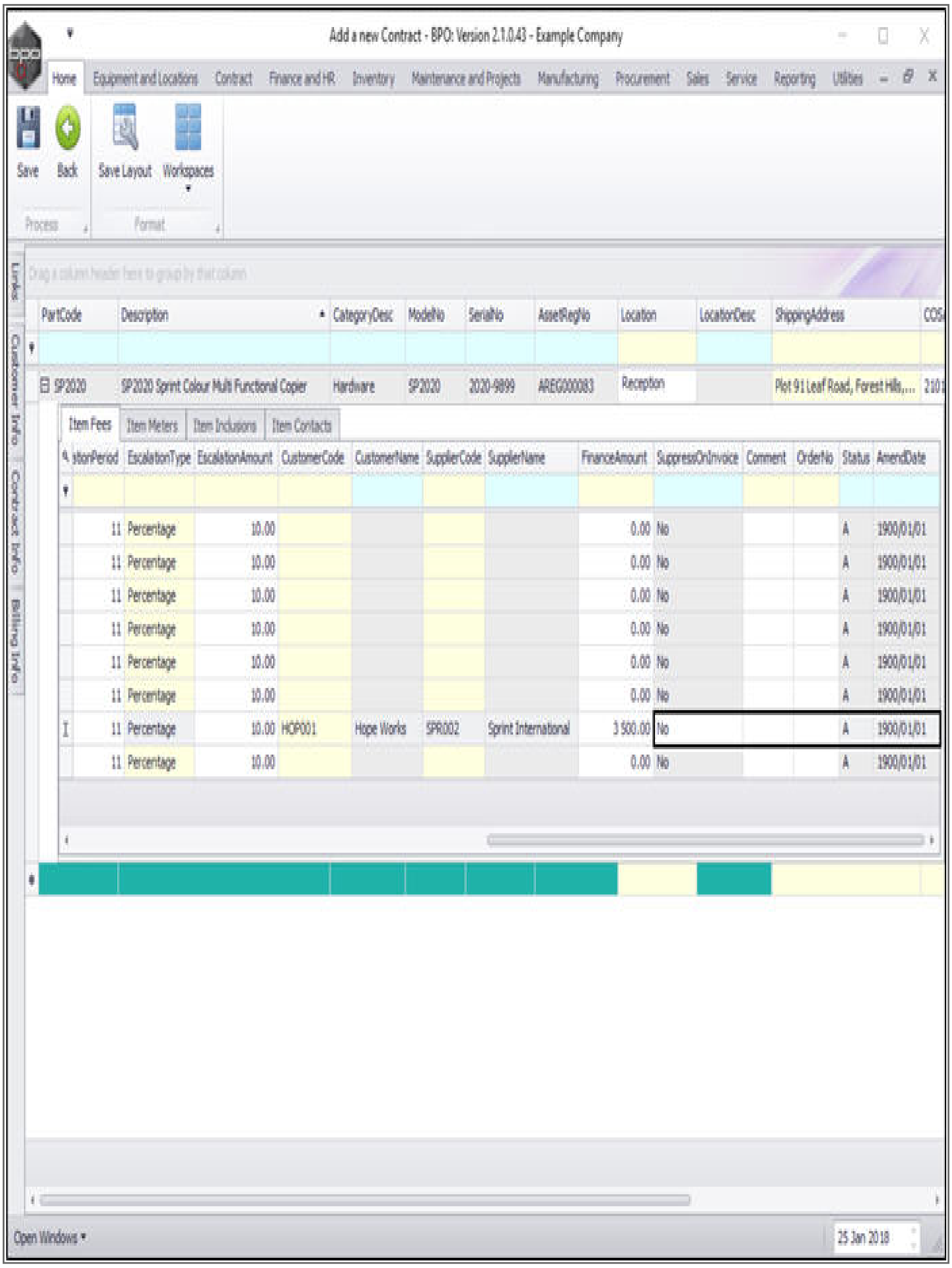
- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



- **Suppress on Invoice:** Select this if you wish to hide the fee on the invoice.

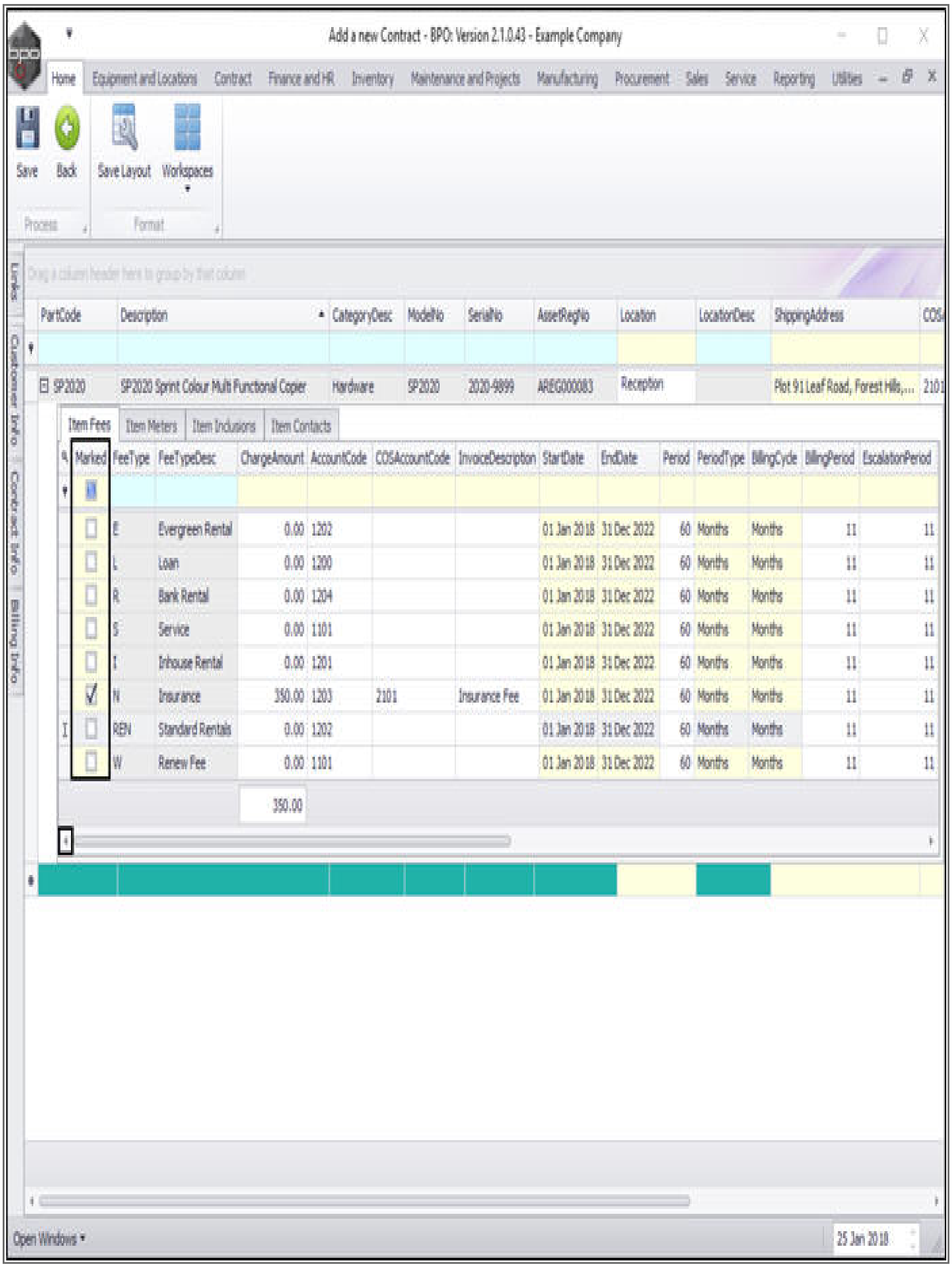
- **Comment:** Click in this text box and type in a comment regarding this contract fee, if required.
- **Order No:** Type in a customer order number relevant to this item, if required.
- **Status:** This field will change from ***I*** (Inactive) to ***A*** (Active) when you have saved the assigned item fee.
- **Amend Date:** This field is static.

The 'Add an Item Fee' process is now complete.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Forest Hills,...
Item Fees
Item Meters
Item Inclusions
Item Contacts
EscalationType
EscalationAmount
CustomerCode
CustomerName
SupplierCode
SupplierName
FinanceAmount
SuppressOnInvoice
Comment
OrderNo
Status
AmendDate
11
Percentage
10.00
0.00
No
A
1900/01/01
HOP001
Hope Works
SPR002
Sprint International
3 500.00
Open Windows
25 Jan 2018

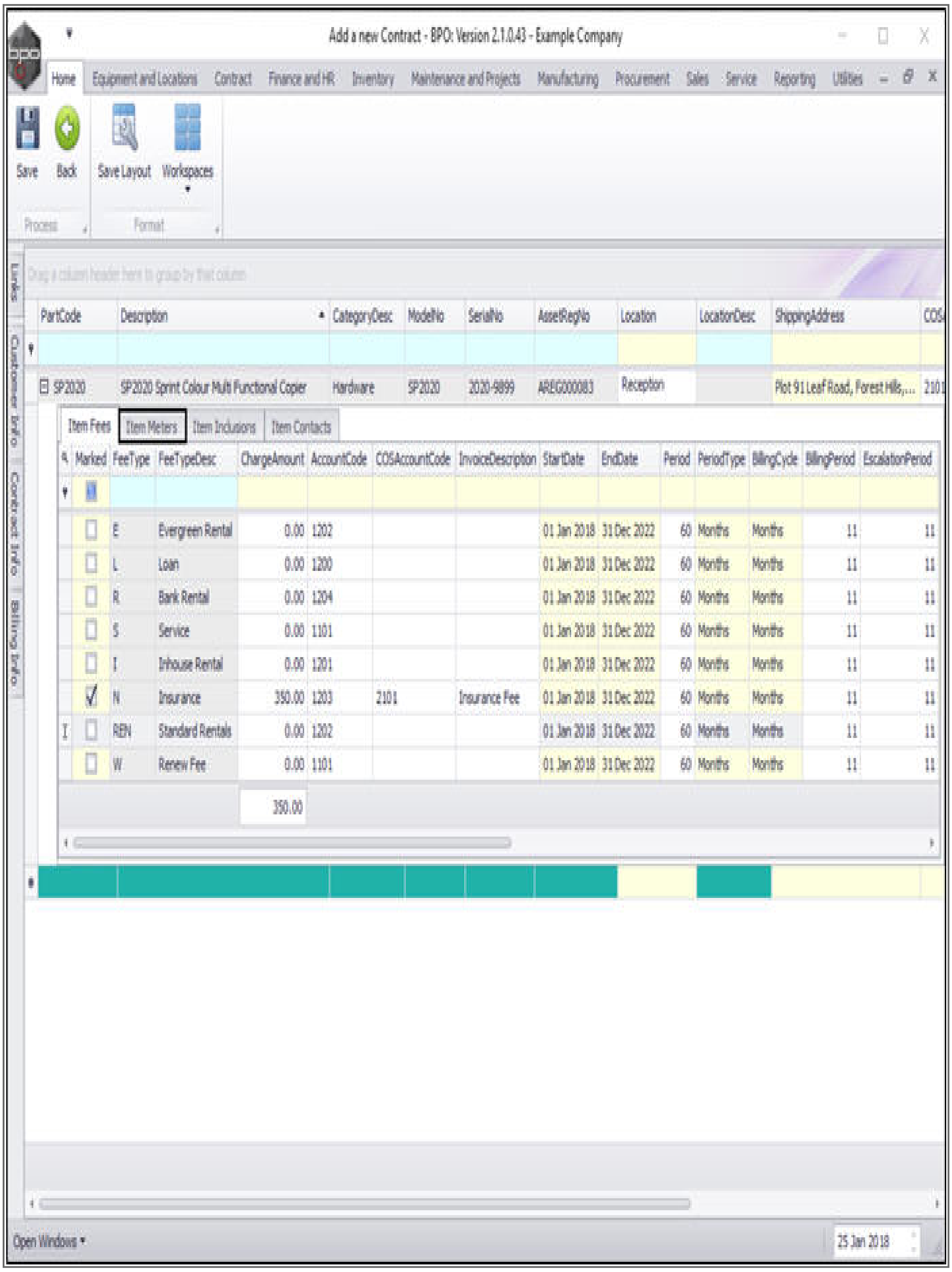
Link Additional Item Fees

- ***Scroll back*** to the ***Marked*** column.
- You can now set up ***additional fees*** for this machine by following the above process, if required, before moving on to the next frame.



ITEM METERS FRAME

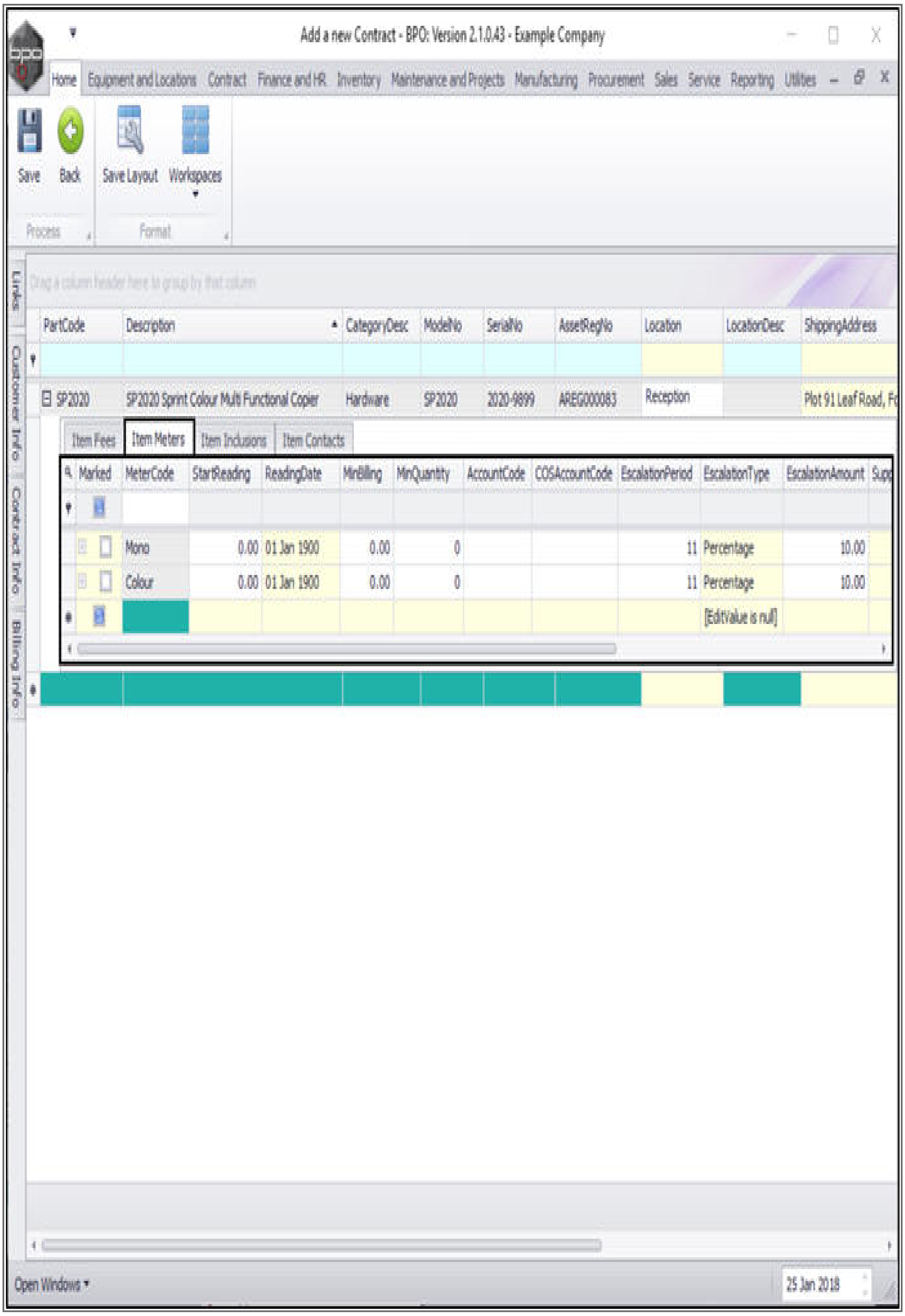
- When you have finished working in the Item Fees frame, click on the ***Item Meters*** tab.



- The Item Meters frame displays all linked meters, minimum billing and meter usage charges.

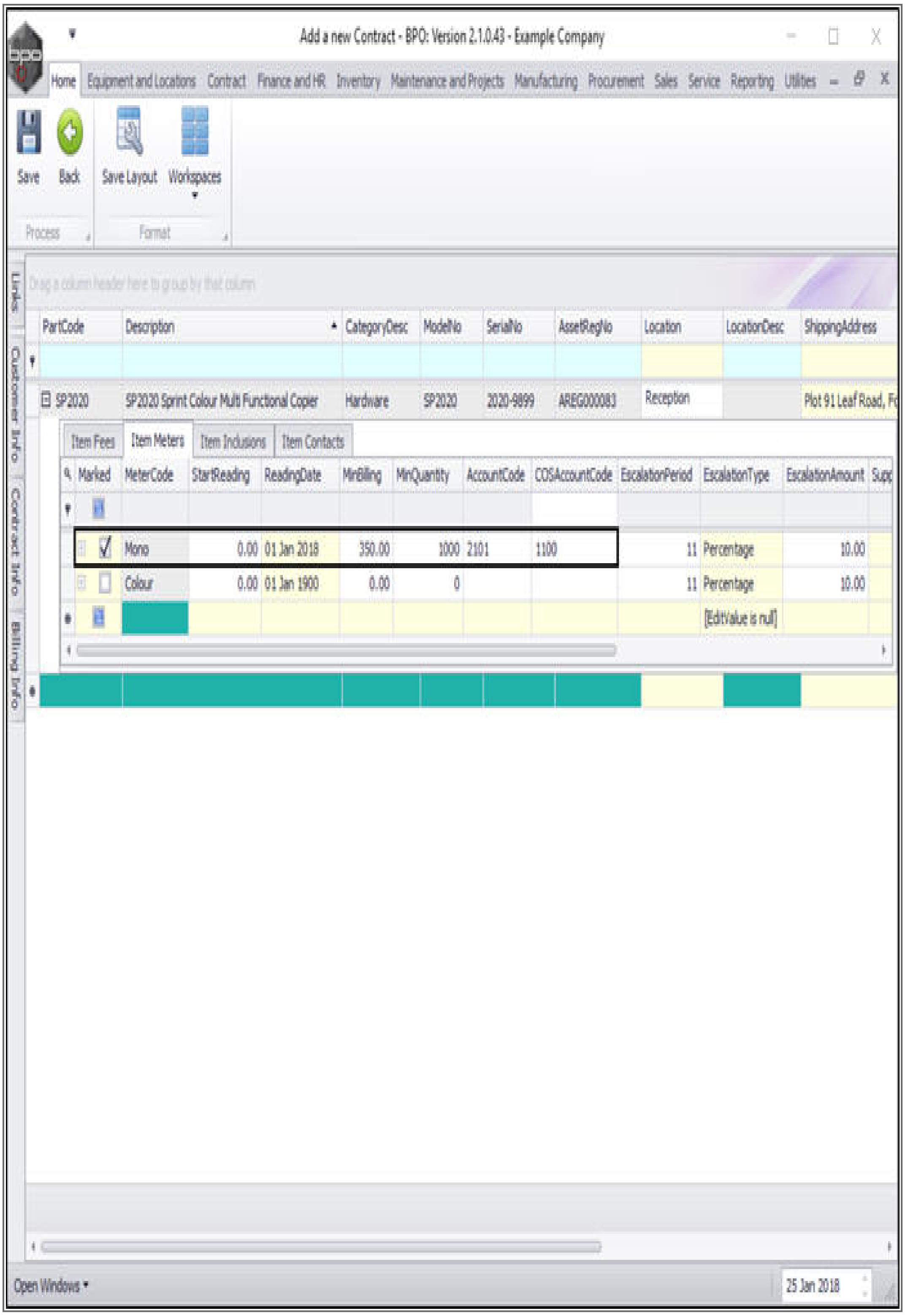
Read this Important Note on Min Billing and Meter Charge Setup

- If you are not going to bill meters - then this is fine. If you are - complete the contract set up (you can link the meters afterwards) then follow these 2 steps:
    - 1. Assign the meter to the machine
    - 2. Add the meter charges to the contract

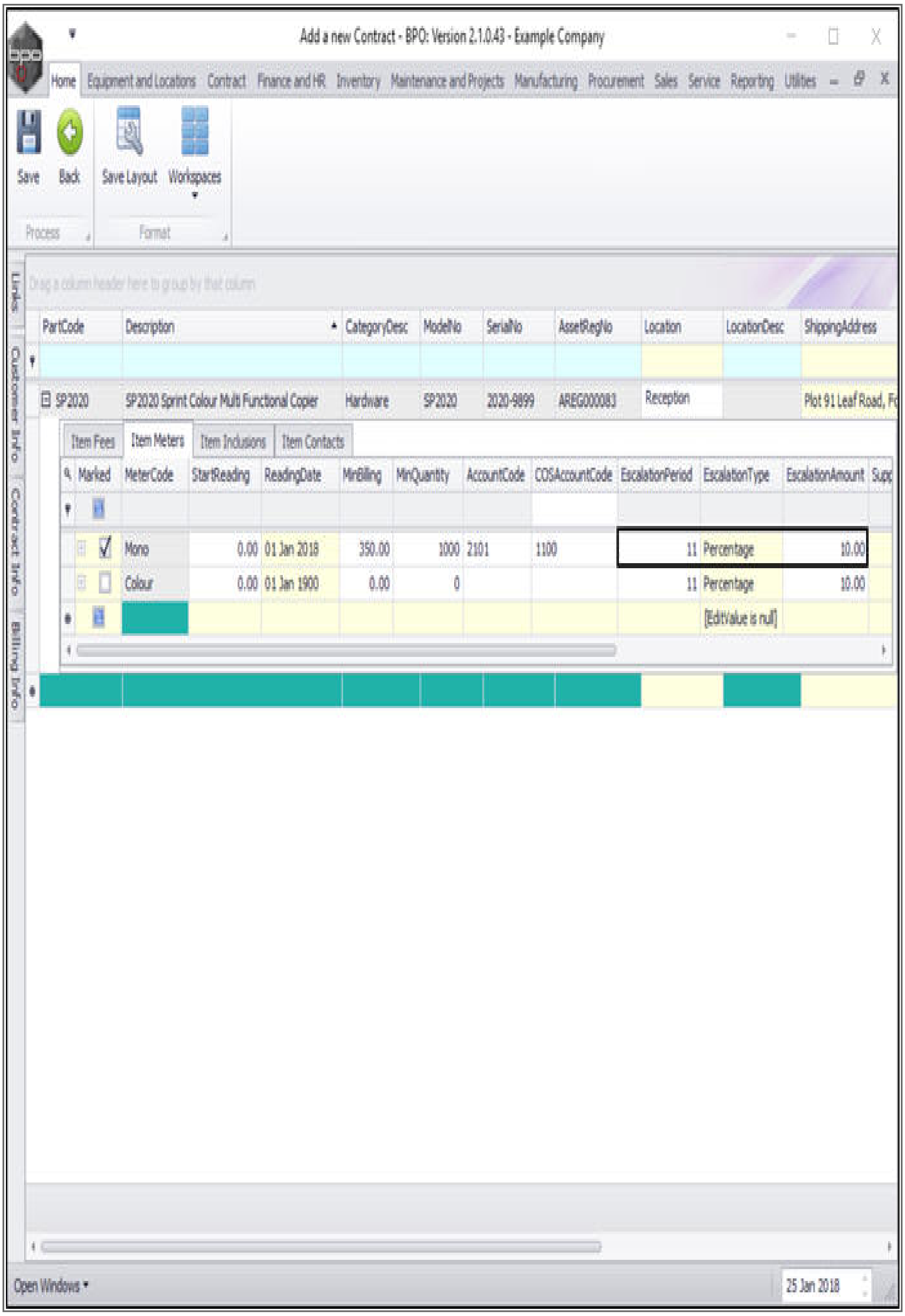


- **Marked:** Click on the check box in front of the name of the first Meter to be billed on this contract.
    - In this image the **Mono** meter has been selected as an example.
- **Start Reading:** Type in the start reading of the meter.

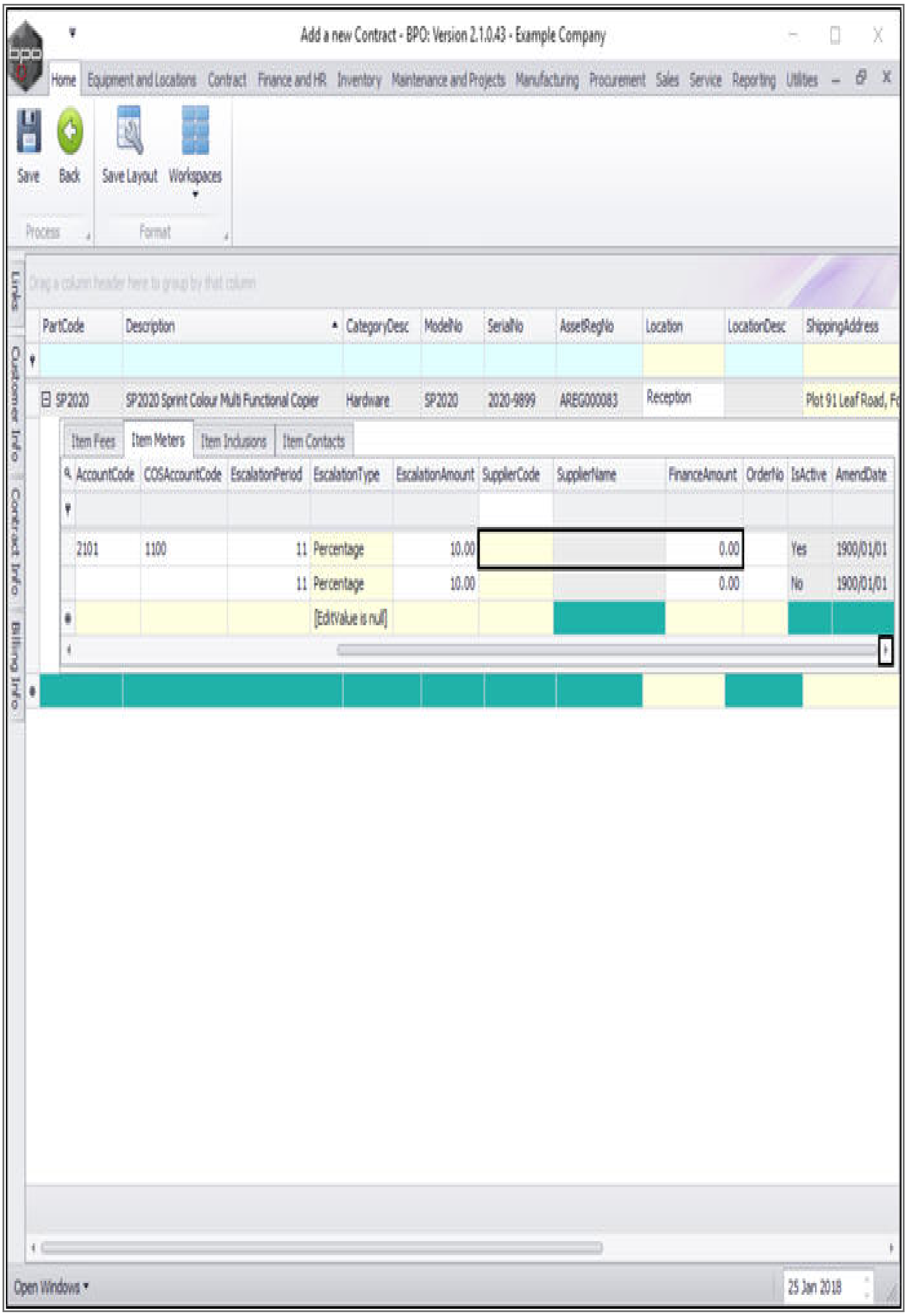
- **Reading Date:** Click in this text box to display the calendar function, use this to select the reading date.
- **Min Billing:** Type in the minimum billing amount (in Rand value).
- **Min Quantity:** Type in the minimum quantity (the copies that are included in the minimum billing amount).
- **Account Code:** Type in the sales account code for these meter charges to post to.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.



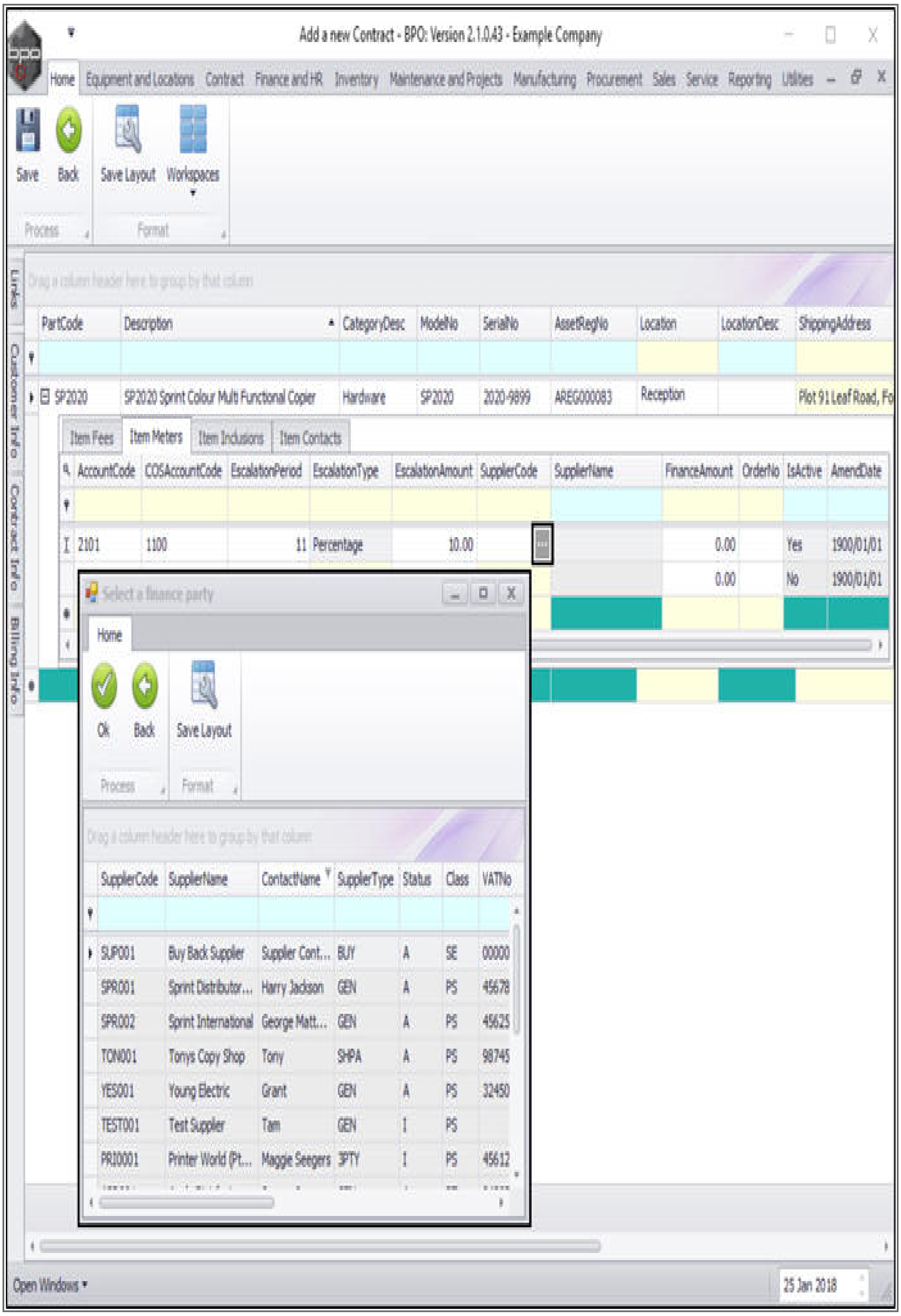
- **Escalation Period, Escalation Type and Escalation Amount:** These will pull through from the main contract details but you can click in the text boxes and amend the details if required.



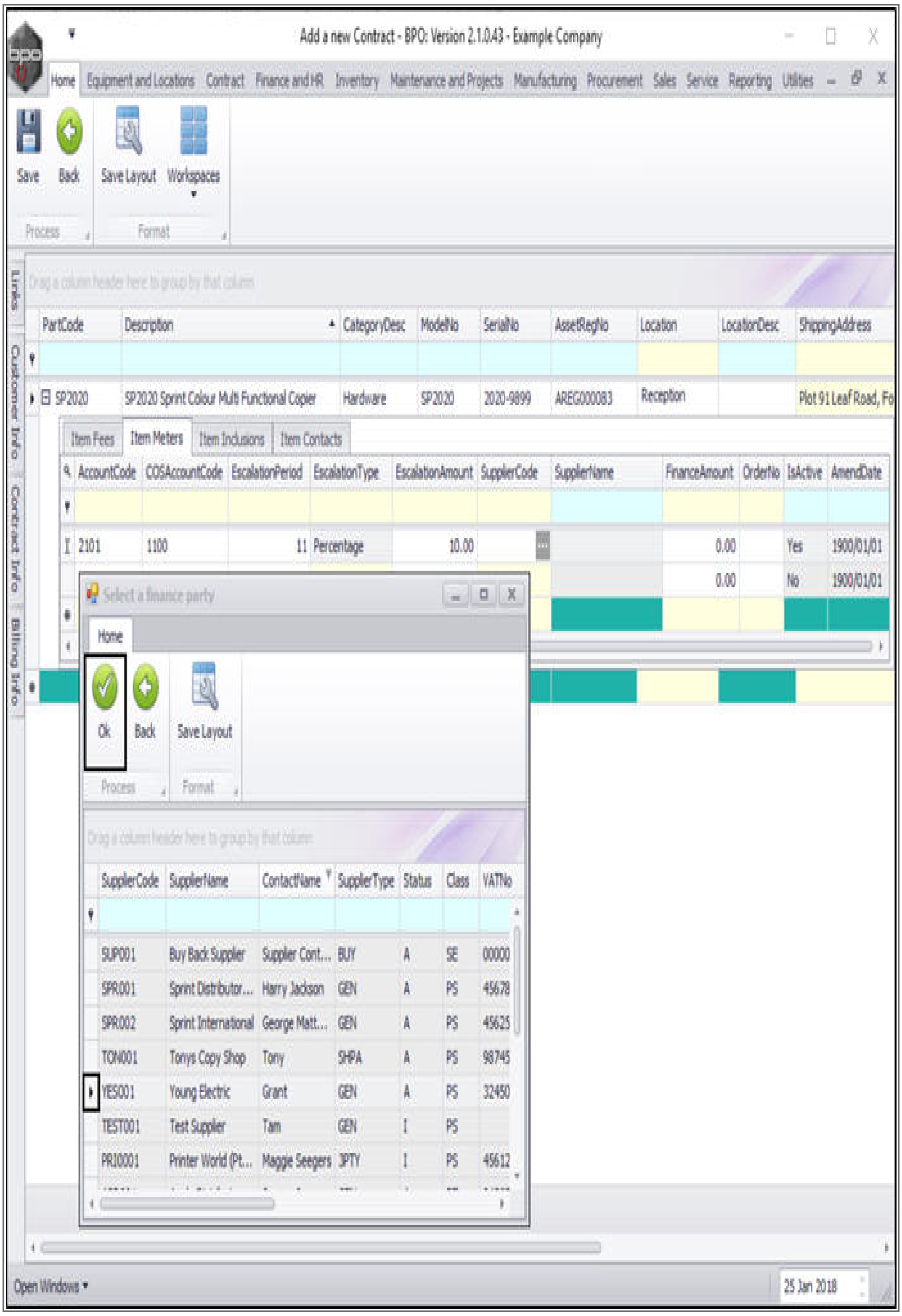
- ***Scroll right*** until you can view the remaining columns in this frame.
    - **Supplier Code, Supplier Name and Finance Amount:** Follow the next 5 screenshots only if you wish to link a supplier here - if a party other than the main customer will be paying for the meter charges (e.g., this company's head office).



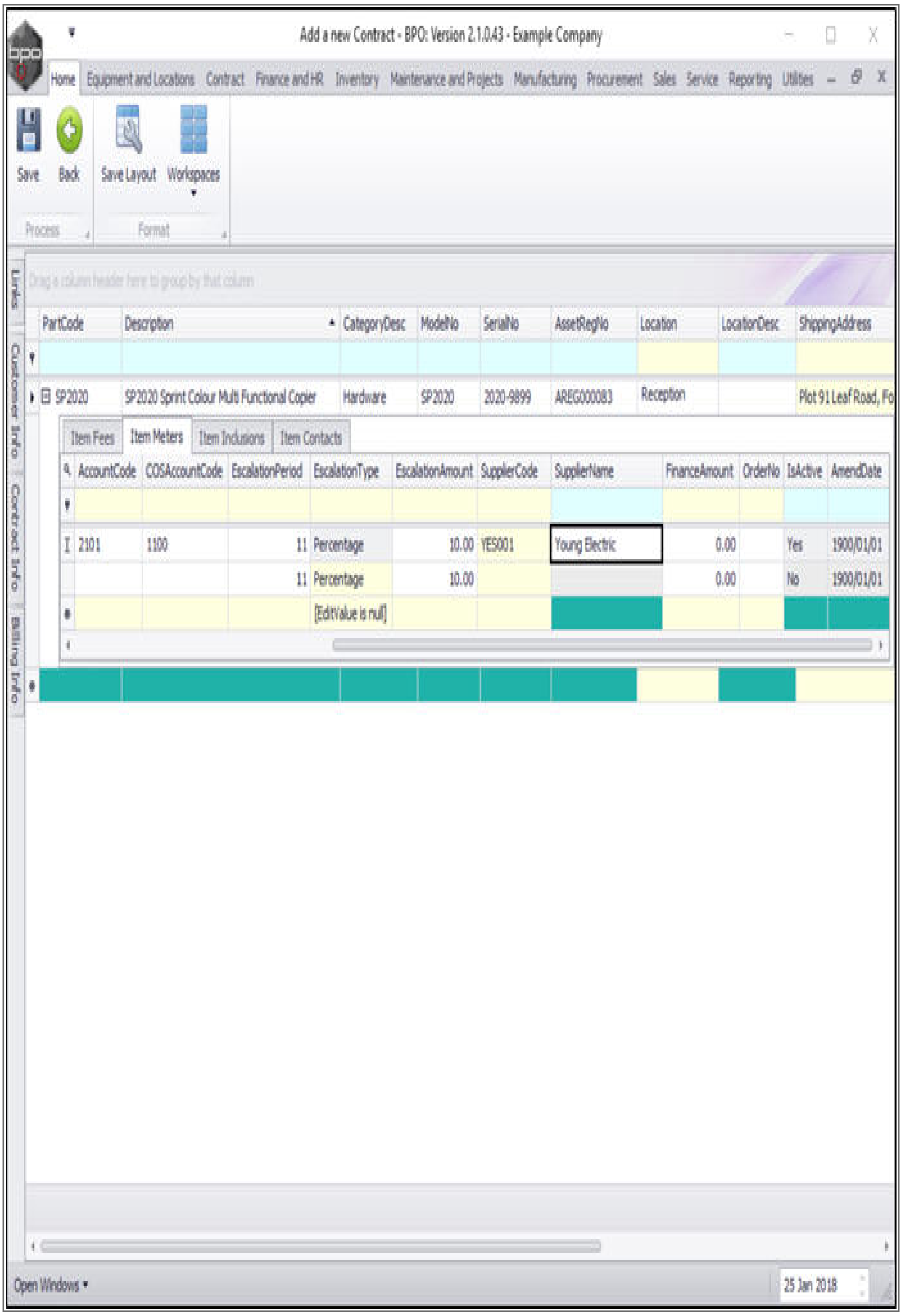
- **Supplier Code:**
    - Click on the ***Supplier Code*** text box to reveal an ***ellipsis*** button.
    - Click on this button to display the ***Select a finance party*** pop up screen.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
AccountCode
COSAccountCode
EscalationPeriod
EscalationType
EscalationAmount
SupplierCode
SupplierName
FinanceAmount
OrderNo
IsActive
AmendDate
2101
1100
11
Percentage
10.00
0.00
Yes
1900/01/01
0.00
No
1900/01/01
Select a finance party
Home
Ok
Back
Save Layout
Process
Format
Drag a column header here to group by that column
SupplierCode
SupplierName
ContactName
SupplierType
Status
Class
VATNo
SUP001
Buy Back Supplier
Supplier Cont...
BUY
A
SE
00000
SPR001
Sprint Distributor...
Harry Jackson
GEN
A
PS
45678
SPR002
Sprint International
George Matt...
GEN
A
PS
45625
TON001
Tonys Copy Shop
Tony
SHPA
A
PS
98745
YES001
Young Electric
Grant
GEN
A
PS
32450
TEST001
Test Supplier
Tam
GEN
I
PS
PRI0001
Printer World (Pt...
Maggie Seegers
3PTY
I
PS
45612
Open Windows
25 Jan 2018

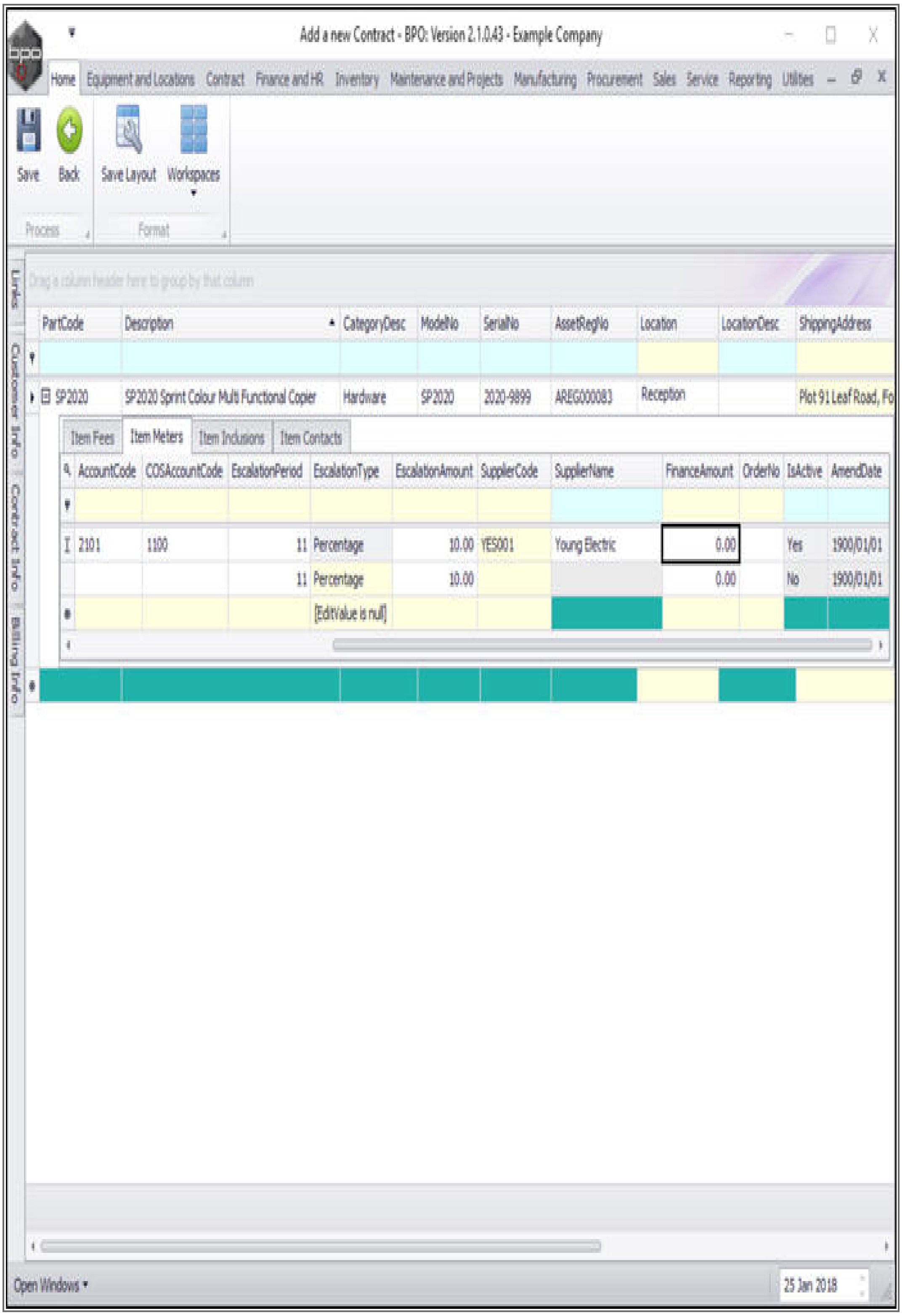
- **Supplier Code:**
    - Click on the ***row selector*** in front of the ***Supplier*** that you wish to ***link*** to this ***item meter***.
    - Click on ***Ok***.



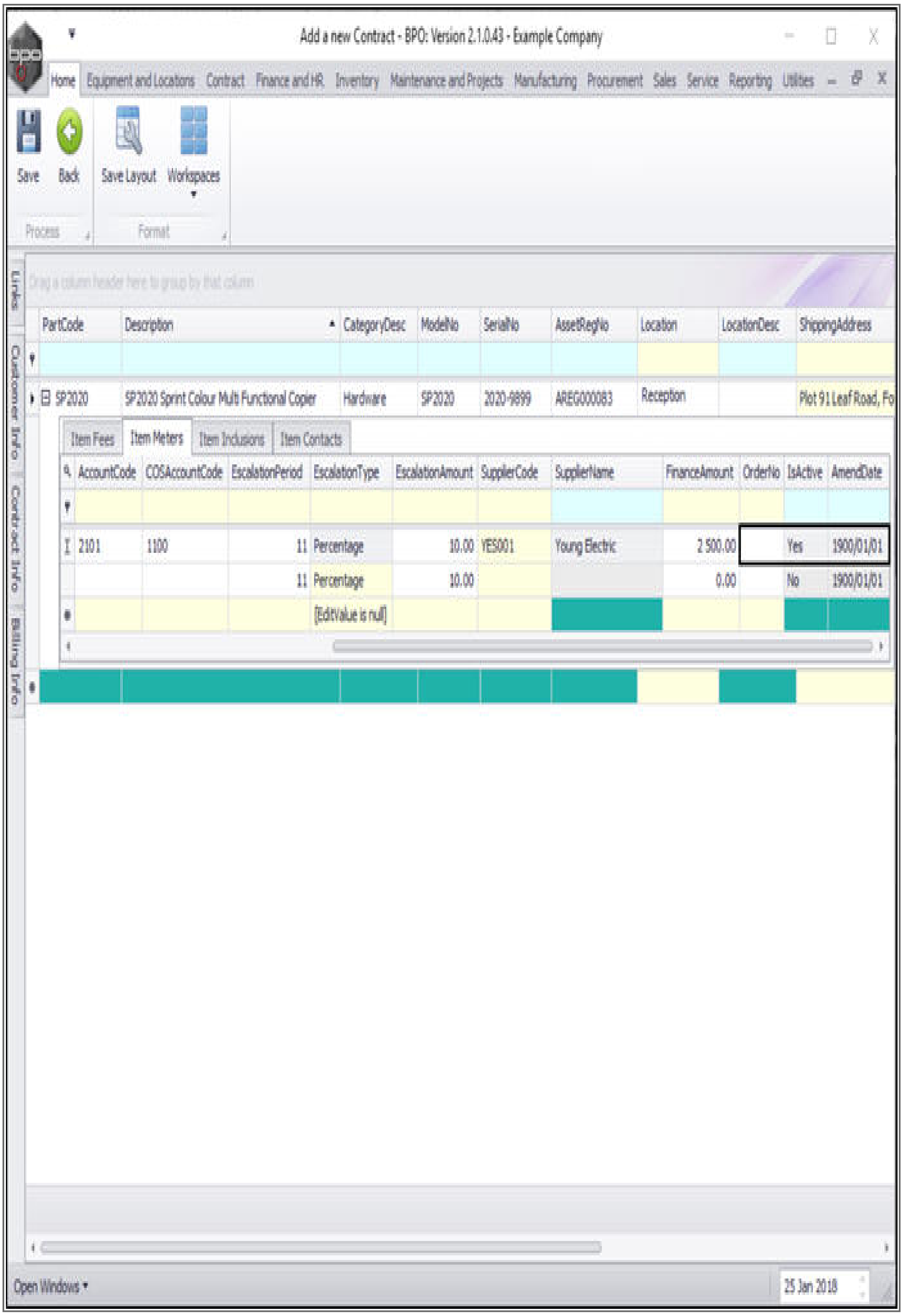
- **Supplier Name:** This will auto populate once the supplier code has been selected.



- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



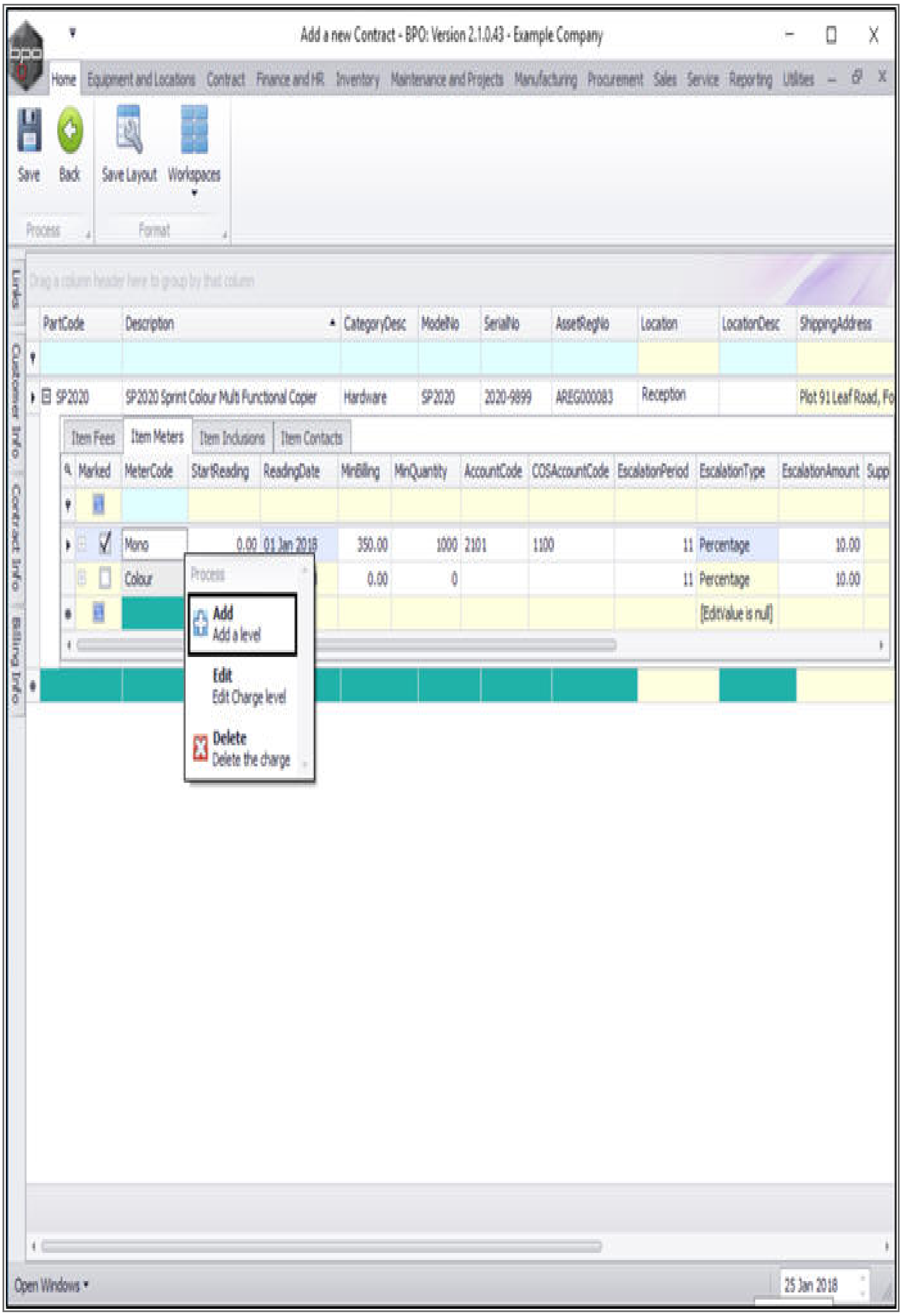
- **Order No:** Type in a customer order number relevant to this item, if required.
- **Is Active:** This field is set to ***Yes*** (Active) once you have clicked on the Marked checkbox.
- **Amend Date:** This field is static.



Add Meter Levels

Read this Important Note on Min Billing and Meter Charge Setup

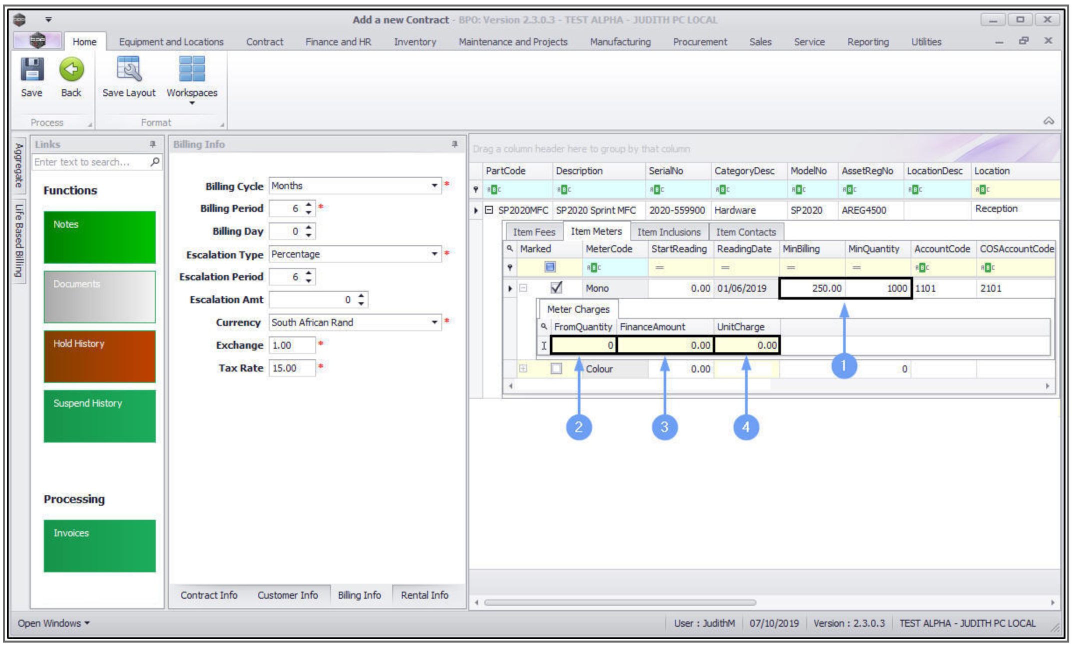
- ***Scroll left*** to return to the ***Marked*** column.
- ***Right click*** in the ***row*** of the ***item*** you wish to ***add*** a ***meter level*** to.
    - In this image the ***Mono*** meter has been selected.
- A ***Process*** menu will pop up.
- Click on ***Add*** - Add a level.



- The ***Meter Charges*** frame will be expanded.

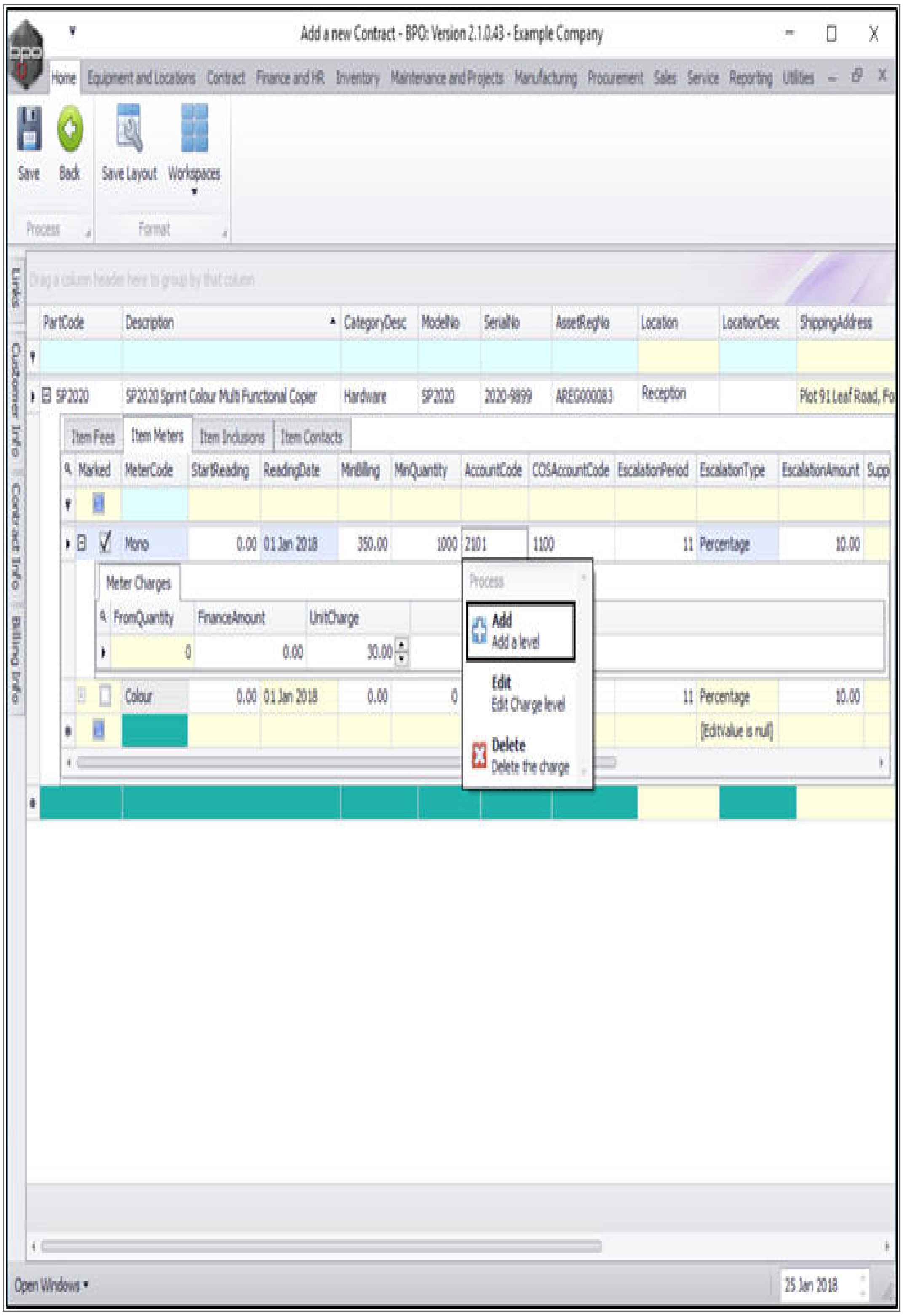
- **Note:** For this mono meter, there is already a minimum billing set up of a R250 charge for the first 1000 copies. BPO calculates the usage charges by first calculating the minimum billing set up. This means the first line in the Meter Charges matrix looks incorrect as the From Quantity is static at 0 but it is actually reading from the minimum billing set up. In this example it will read the meter from 1001.

- **From Quantity:** This is the number from which this charge will be effective.
    - As the first (minimum billing level) is up to and including 1000, this level will start counting from 1001.
- **Finance Amount:** This will only be populated if back-to-back finance is used, and the finance house is financing part of the meter charge.
- **Unit Charge:** Type in the unit charge for the meter (charge per copy when Minimum Quantity is exceeded).



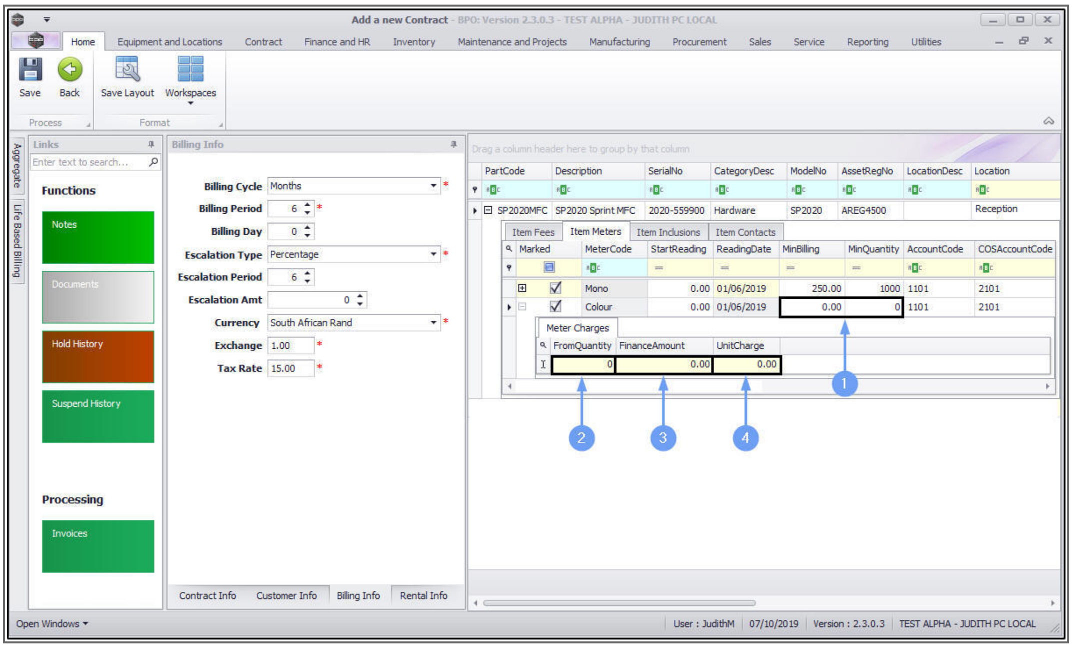
Add Additional Charge Level

- ***Right click*** anywhere in the ***row*** of the ***item*** that you wish to add ***anothermeter level*** to. (You can keep the meter charges matrix open).
- The ***Process*** menu will pop up again.
- Click on ***Add*** - Add a level.

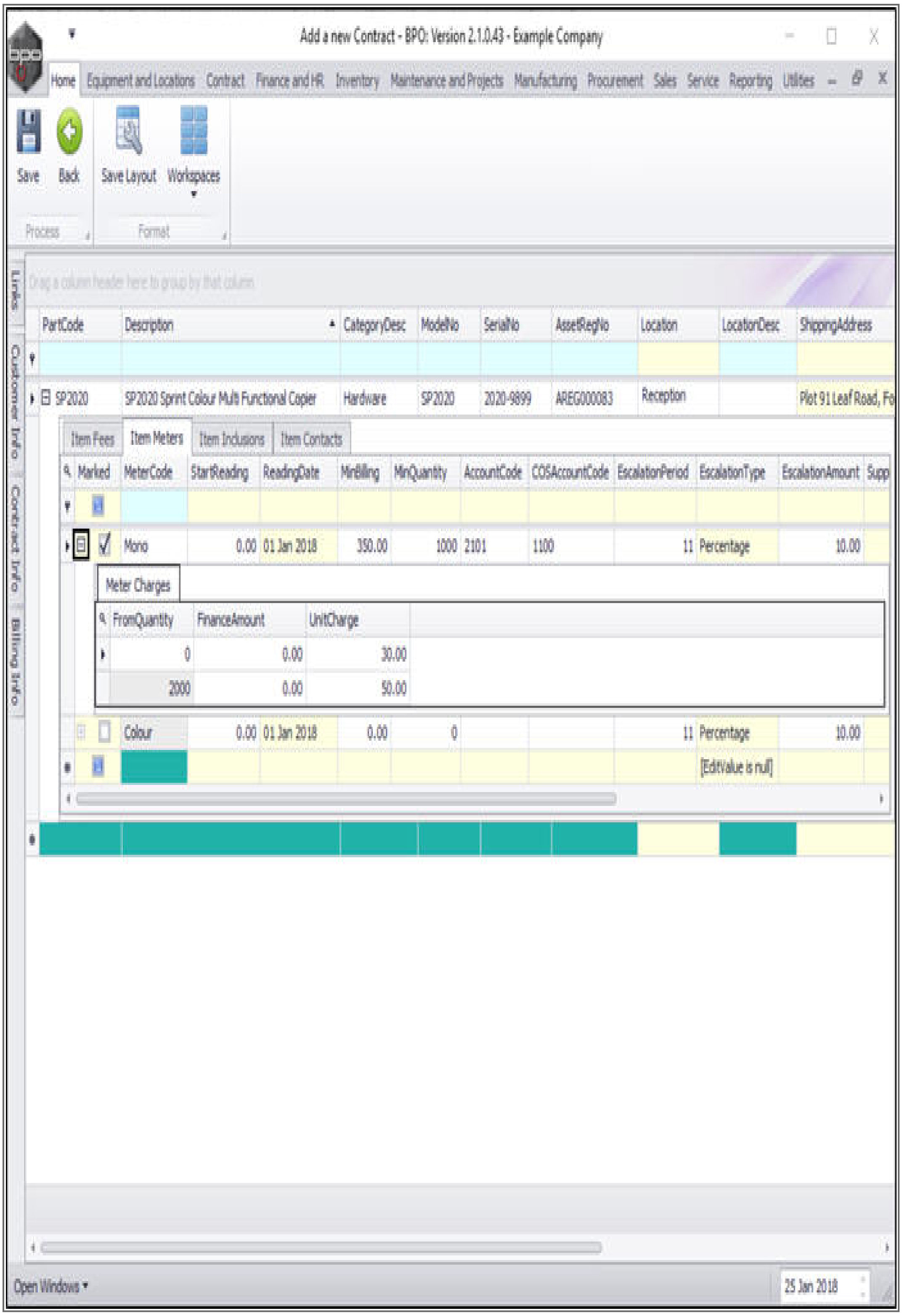


- A ***second level*** has now been added to the Meter Charges matrix.
    - **From Quantity:** Type in or use the arrow indicators to select the number of copies from which this charge will be effective.
    - **Finance Amount:** This will only be populated if back-to-back finance is used, and the finance house is financing part of the meter charge.
    - **Unit Charge:** Type in the unit charge for the meter (charge per copy).

        - Repeat this process to add more meter charges as required.

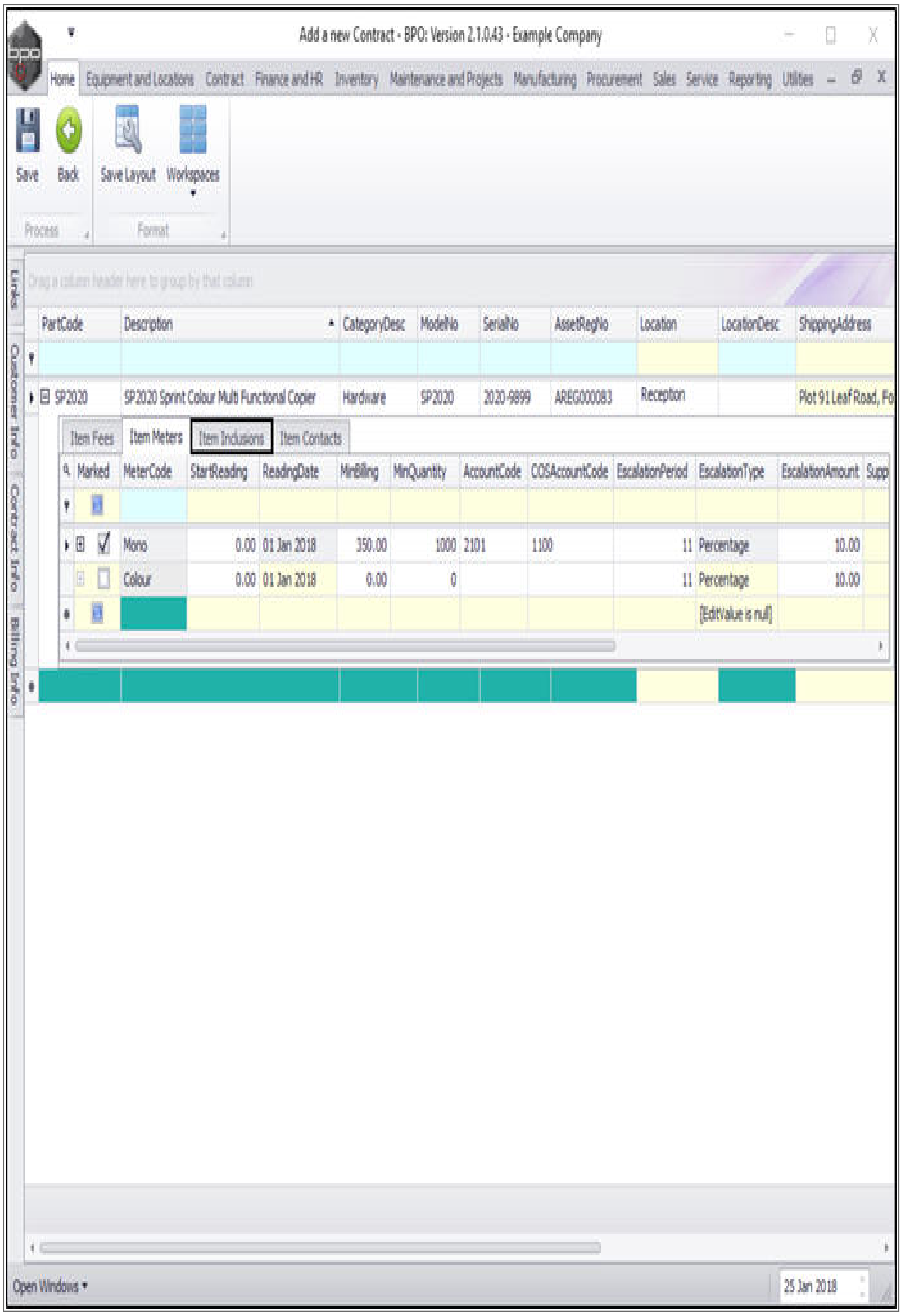


- When you have finished working in the Meter Charges frame, ***close*** the frame.

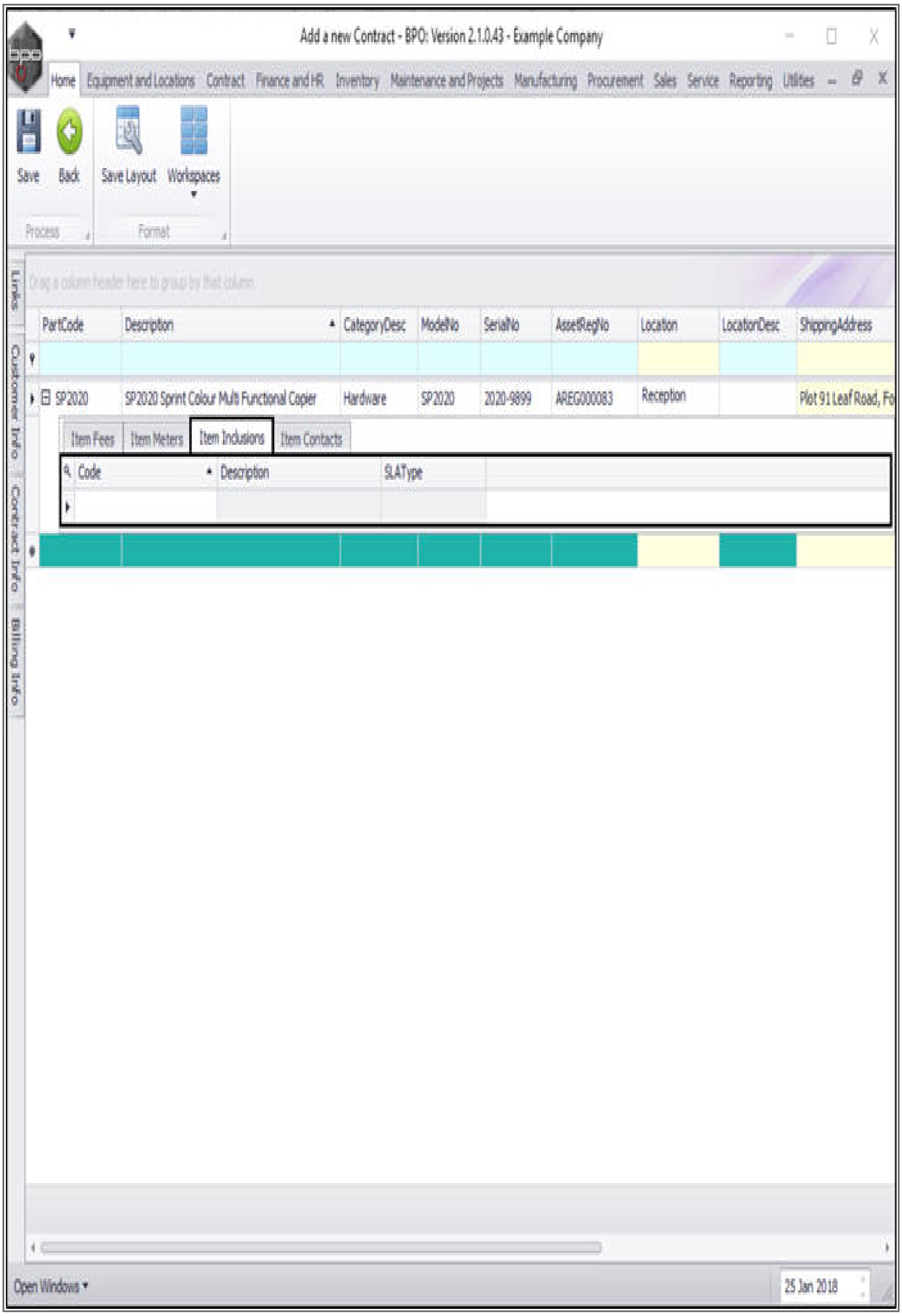

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Marked
MeterCode
StartReading
ReadingDate
MinBilling
MinQuantity
AccountCode
COSAccountCode
EscalationPeriod
EscalationType
EscalationAmount
Mono
0.00
01 Jan 2018
350.00
1000
2101
1100
11
Percentage
10.00
Meter Charges
FromQuantity
FinanceAmount
UnitCharge
0
0.00
30.00
2000
0.00
50.00
Colour
0.00
01 Jan 2018
0.00
0
11
Percentage
10.00
[EditValue is null]
Open Windows
25 Jan 2018

ITEM INCLUSIONS FRAME

- Click on the ***Item Inclusions*** tab.



- The ***Item Inclusions*** frame will be expanded.
    - The Item Inclusions frame lists all ***Contract Inclusions*** (items which are included in the contract and not billed separately).

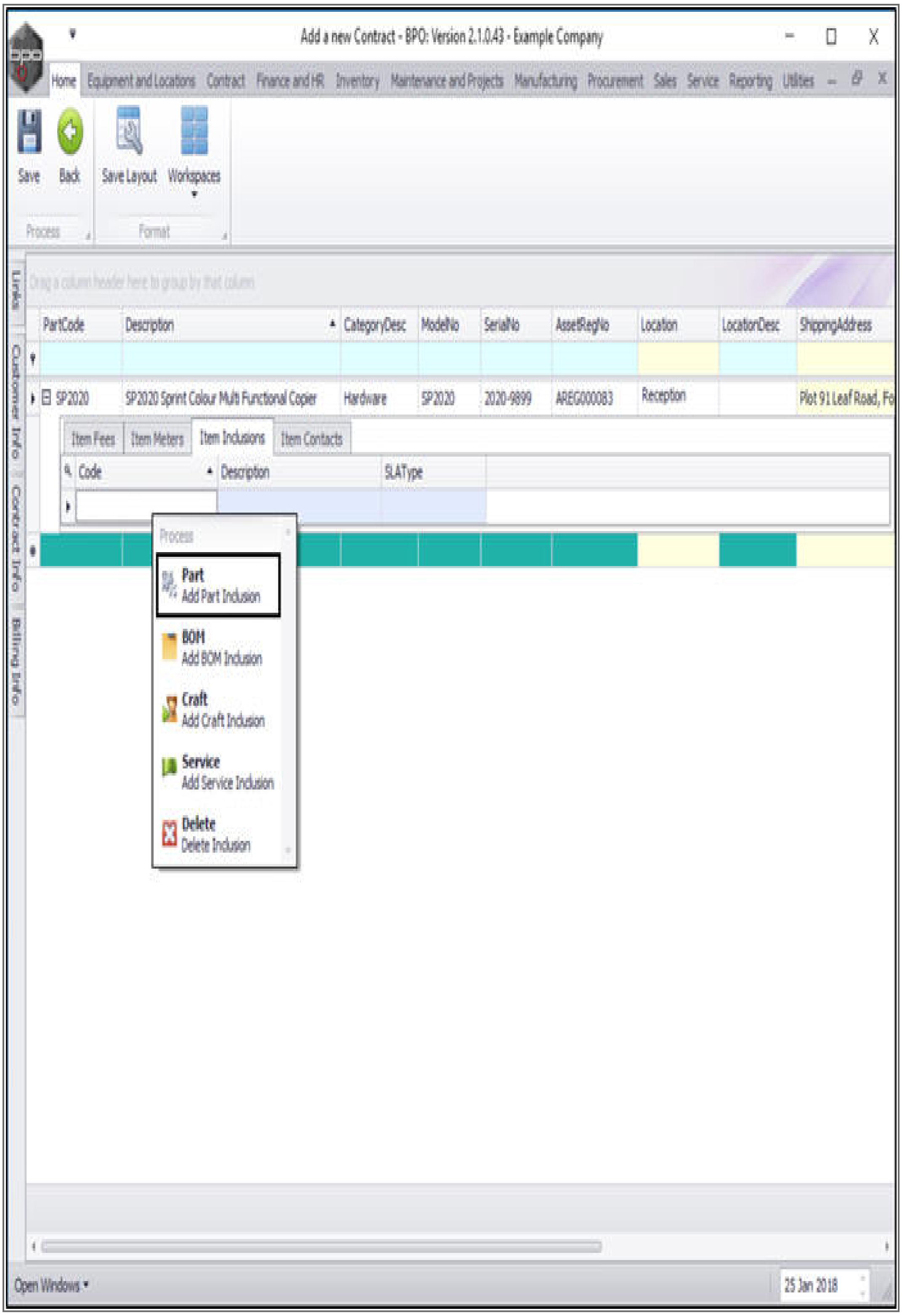

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
Open Windows
25 Jan 2018

Add Item Inclusions

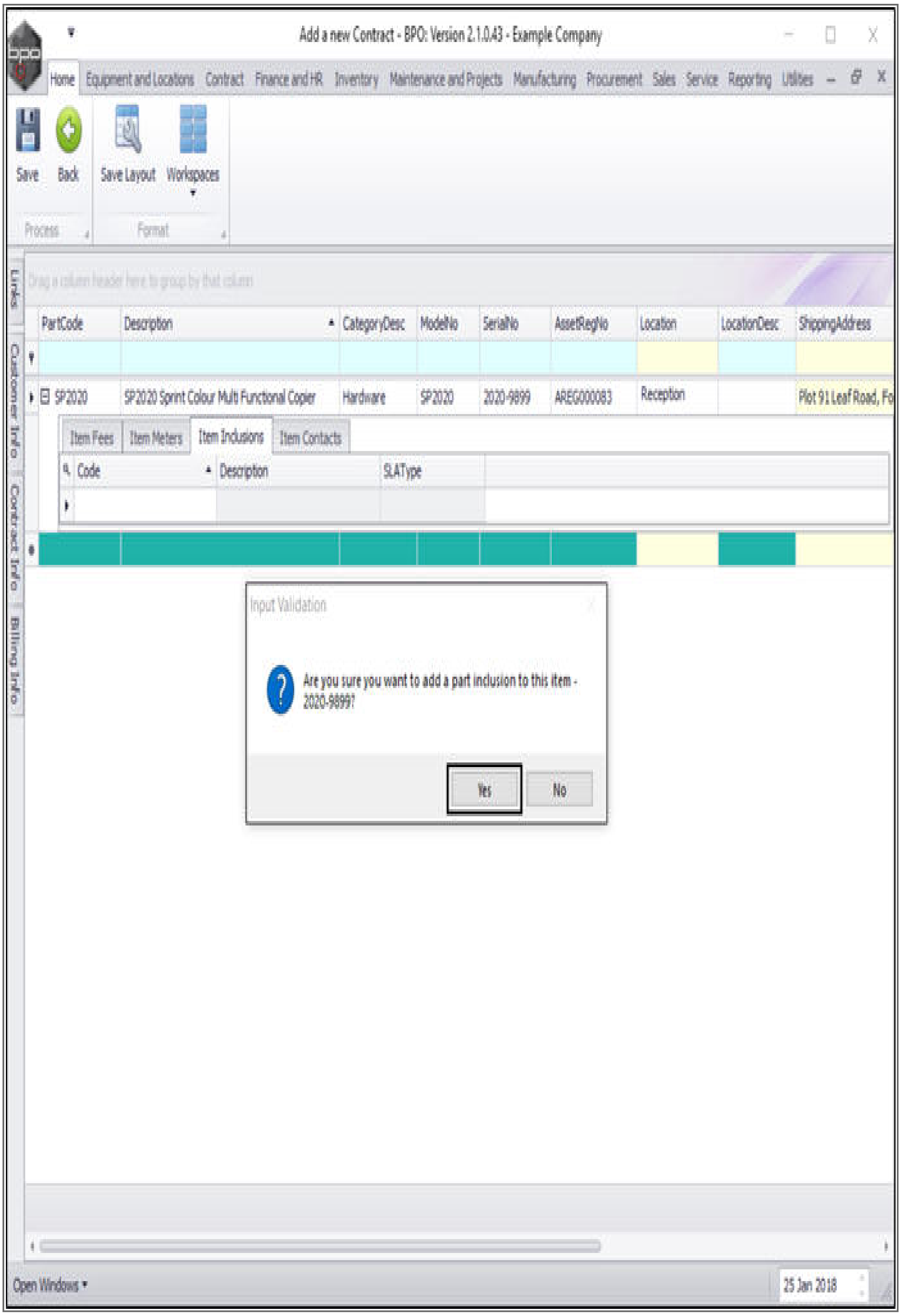
- ***Right click*** anywhere in a ***row*** of the ***Item Inclusions*** frame.
- A ***Process*** menu will pop up with the following options:
    - **Part:** Add Part Inclusion
    - **BOM:** Add BOM Inclusion
    - **Craft:** Add Craft Inclusion
    - **Service:** Add Service Inclusion
    - **Delete:** Delete Inclusion

Add Part Inclusion

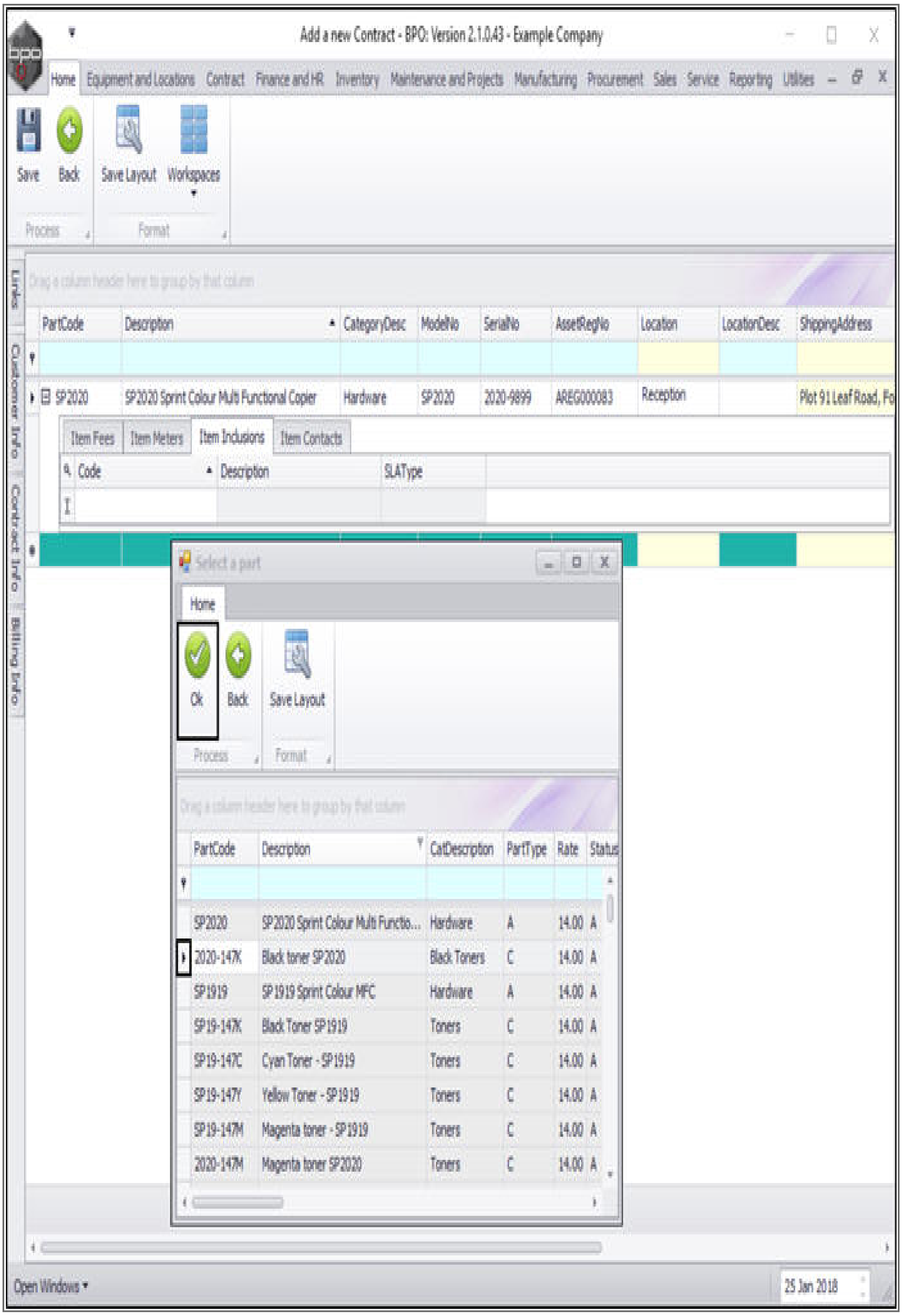
- Click on ***Part*** - Add Part Inclusion (individual part issued to a call that will not be billed).


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
2020-9899
AREG000083
Reception
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
SLAType
Part
Add Part Inclusion
BOM
Add BOM Inclusion
Craft
Add Craft Inclusion
Service
Add Service Inclusion
Delete
Delete Inclusion
Open Windows
25 Jan 2018

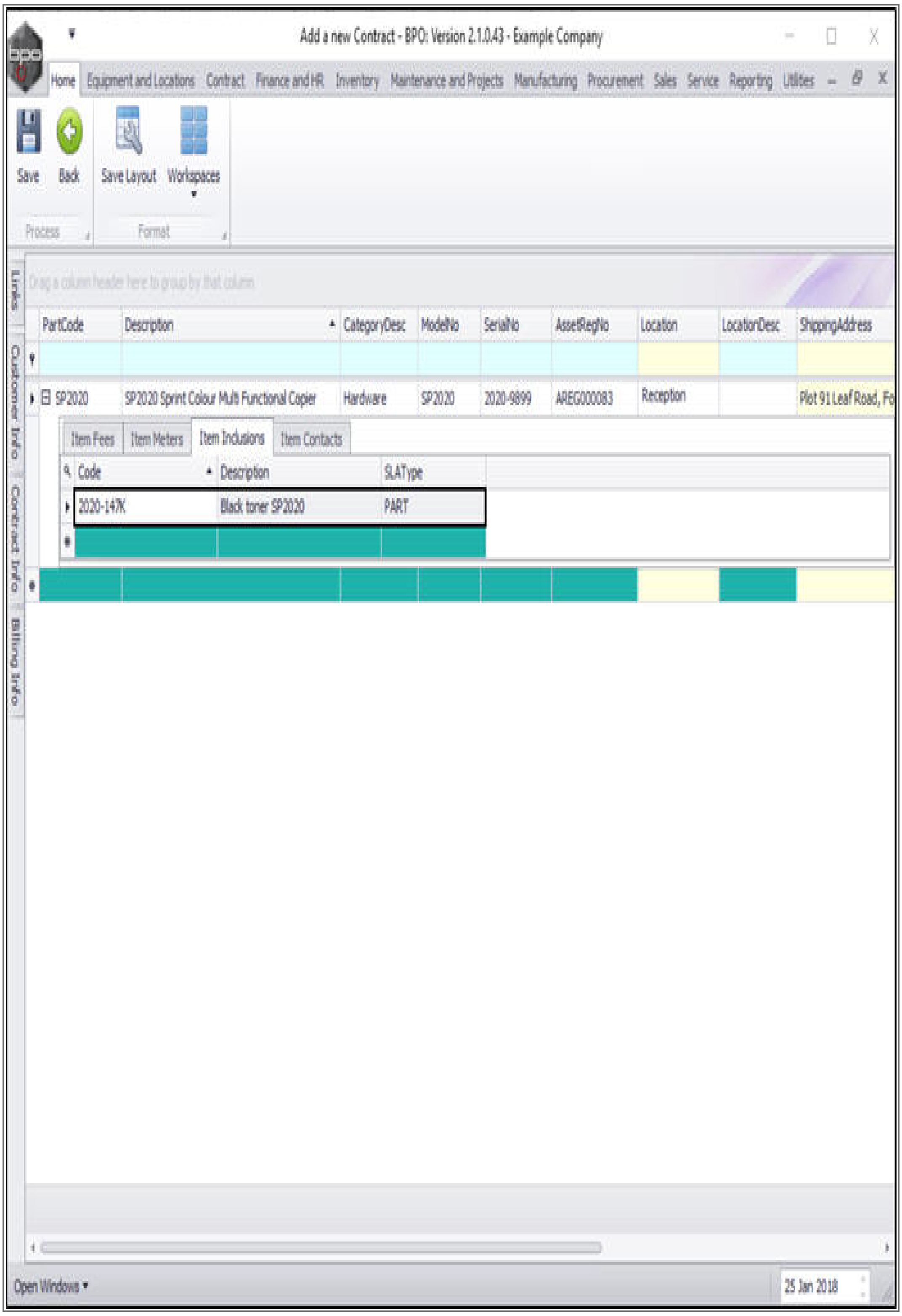
- An ***Input Validation*** message box will pop up asking;
    - ***Are you sure you want to add a part inclusion to this item - [ ]?***
- Click on ***Yes***.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
Input Validation
Are you sure you want to add a part inclusion to this item - 2020-9899?
Yes
No
Open Windows
25 Jan 2018

- A ***Select a part*** screen will pop up.
- Click on the ***row selector*** in front of the ***part*** you wish to ***add*** to this contract as an ***inclusion***.
- Click on ***Ok***.



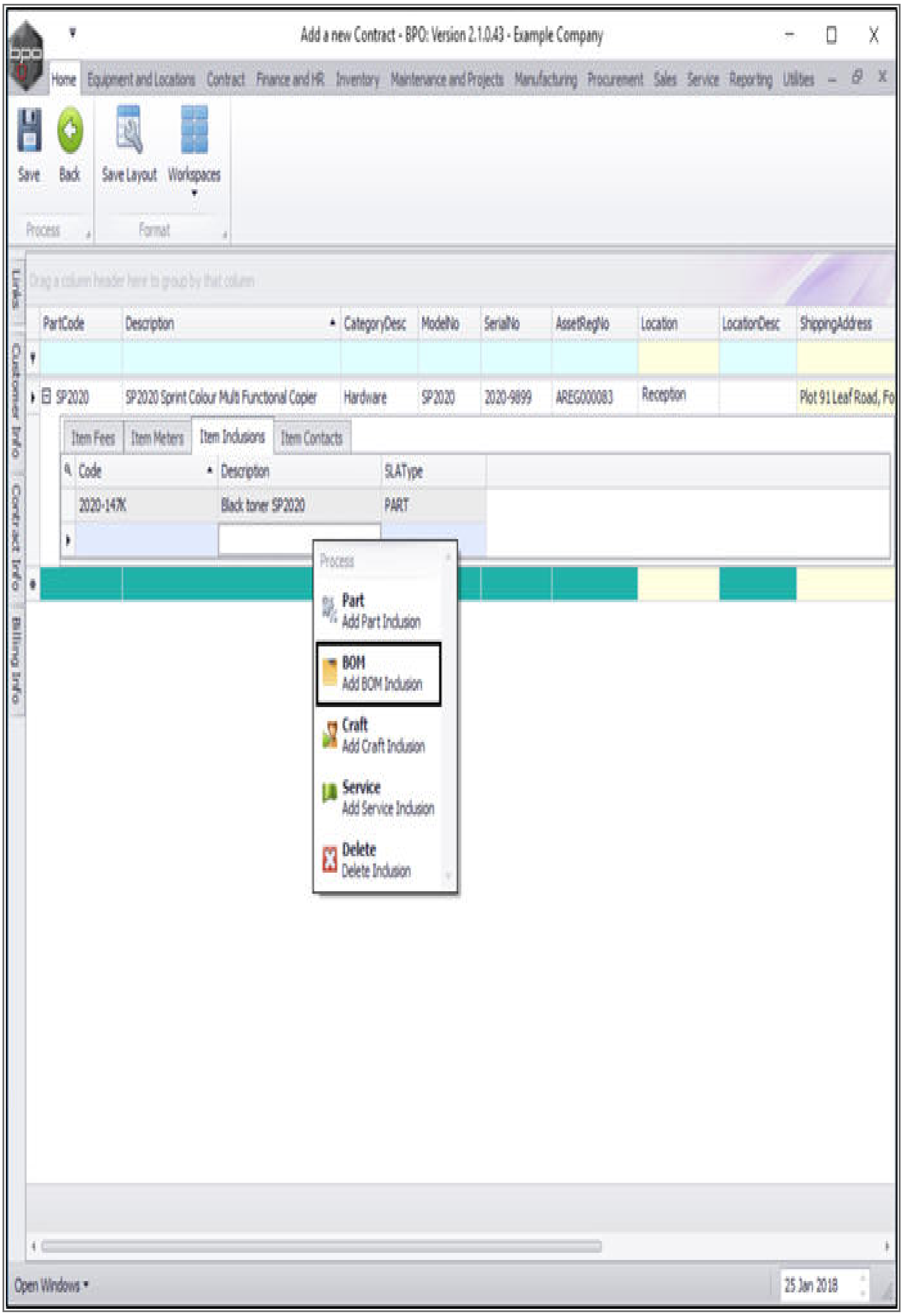
- The selected part will be ***added*** to the ***Item Inclusion*** frame.



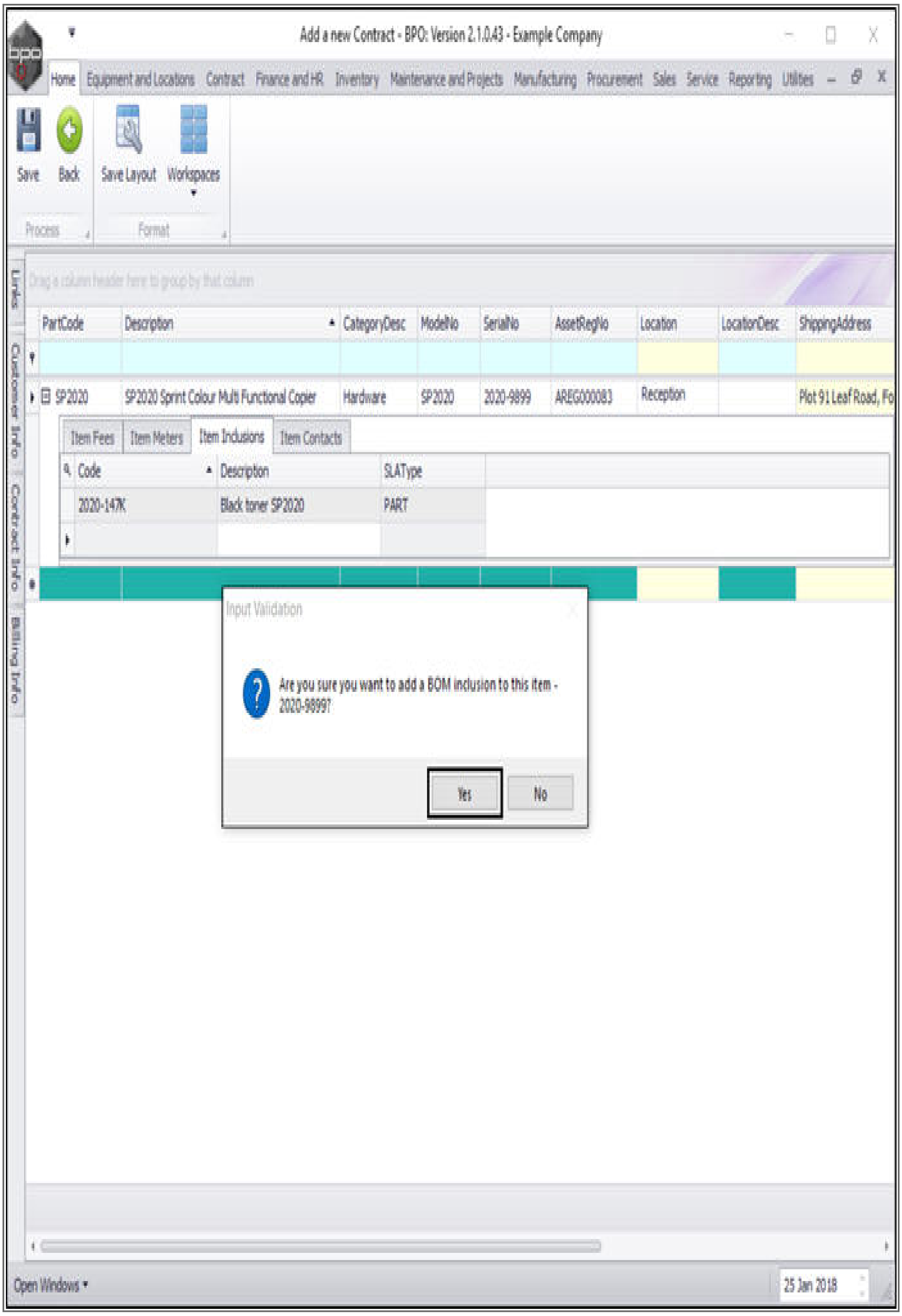
Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
Open Windows
25 Jan 2018

Add BOM Inclusion

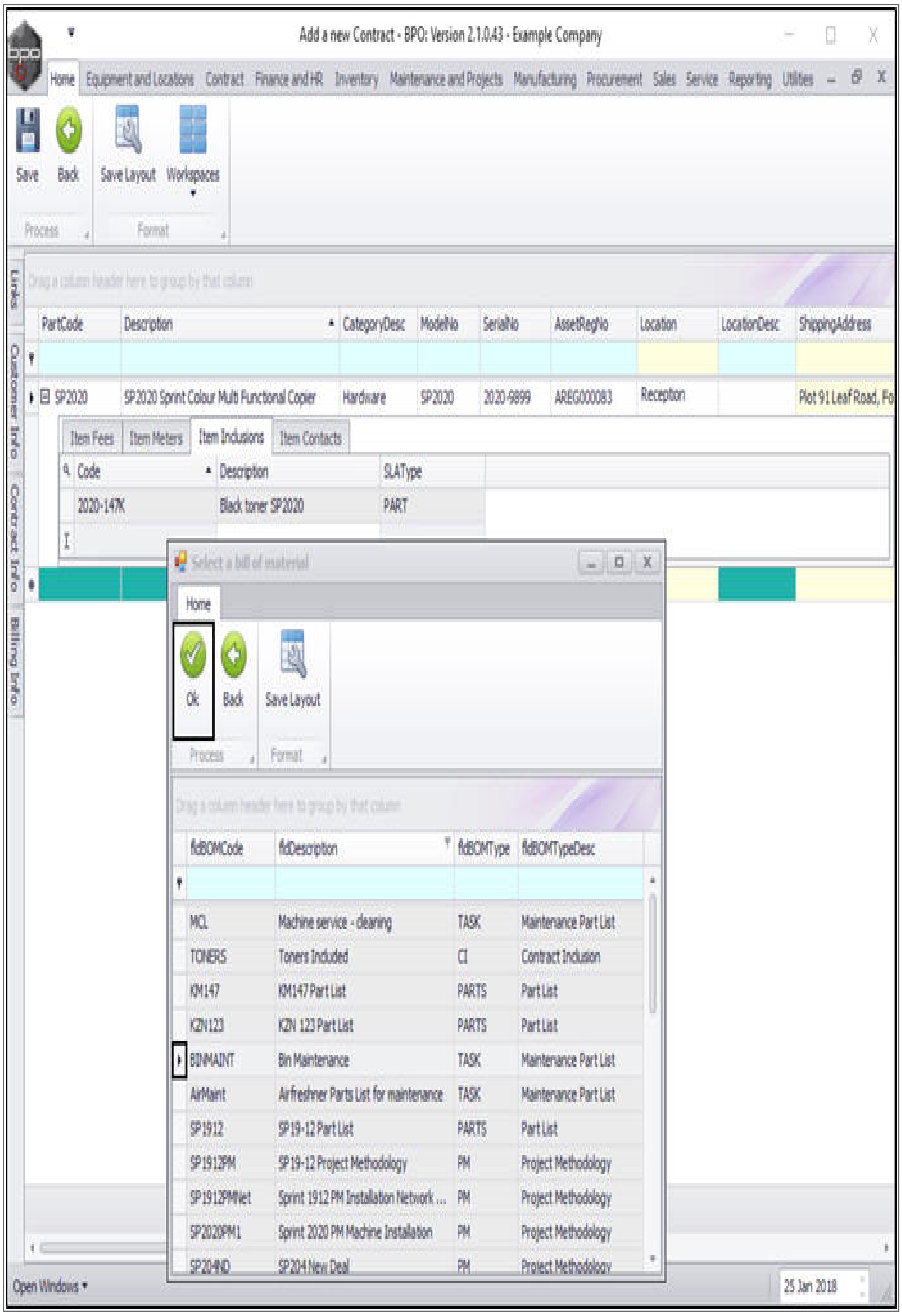
- ***Right click*** anywhere in a ***row*** of the ***Item Inclusions*** frame.
- The ***Process*** menu will pop up.
- Click on ***BOM*** - Add BOM Inclusion (contract inclusion parts issued to a call that will not be billed).



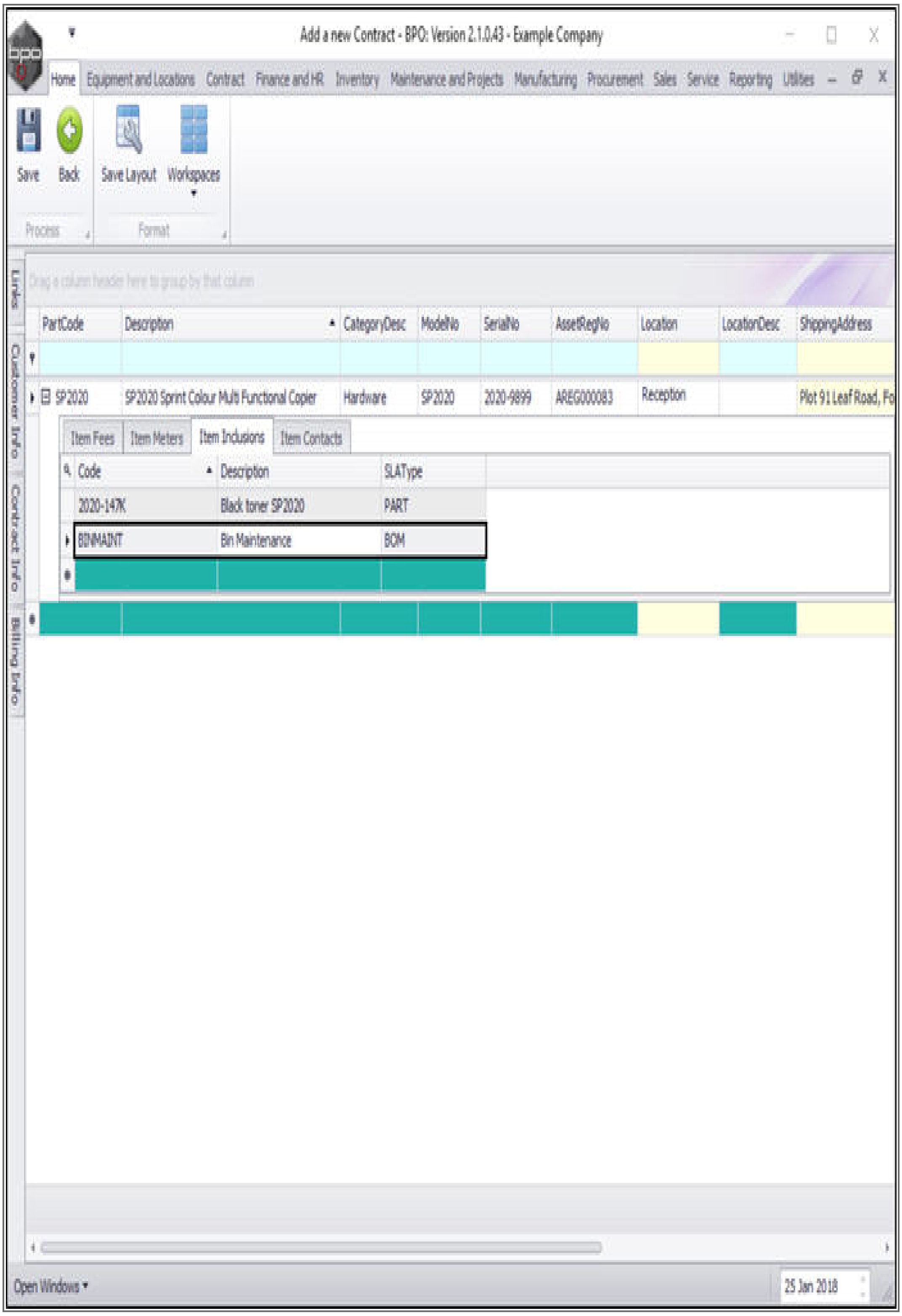
- An ***Input Validation*** message box will pop up asking;
    - ***Are you sure you want to add a BOM inclusion to this item - [ ]?***
- Click on ***Yes***.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links Customer Info Contract Info Billing Info
Drag a column header here to group by that column
PartCode Description CategoryDesc ModelNo SerialNo AssetRegNo Location LocationDesc ShippingAddress
SP2020 SP2020 Sprint Colour Multi Functional Copier Hardware SP2020 2020-9899 AREG000083 Reception Plot 91 Leaf Road, Fo
Item Fees Item Meters Item Inclusions Item Contacts
Code Description SLAType
2020-147K Black toner SP2020 PART
Input Validation
Are you sure you want to add a BOM inclusion to this item - 2020-9899?
Yes No
Open Windows
25 Jan 2018

- A ***Select a bill of material*** screen will pop up.
- Click on the ***row selector*** in front of the ***BOM*** you wish to ***add*** to this contract as an ***inclusion***.
- Click on ***Ok***.

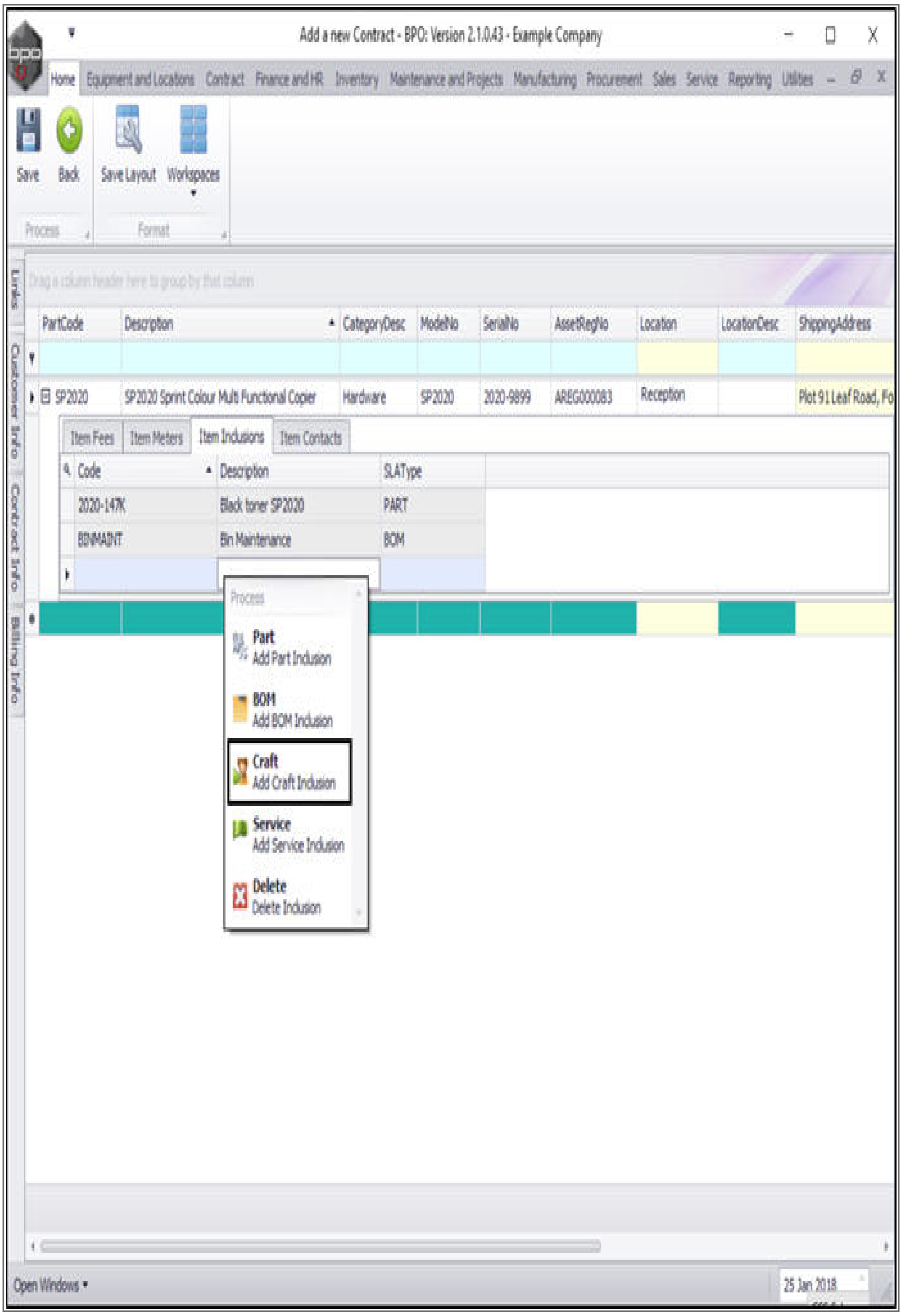


- The selected BOM will be added to the Item Inclusions frame.

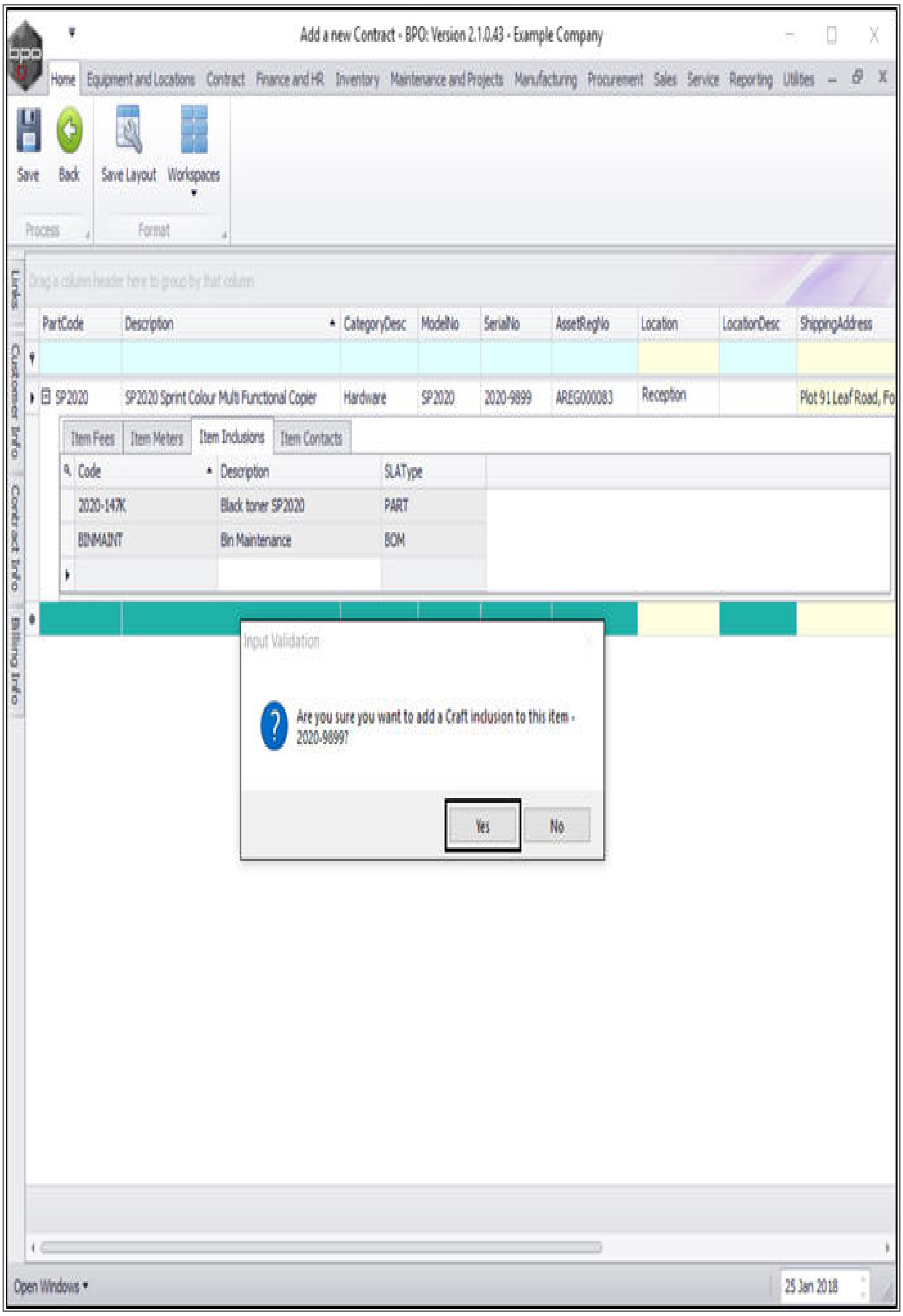

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
Open Windows
25 Jan 2018

Add Craft Inclusion

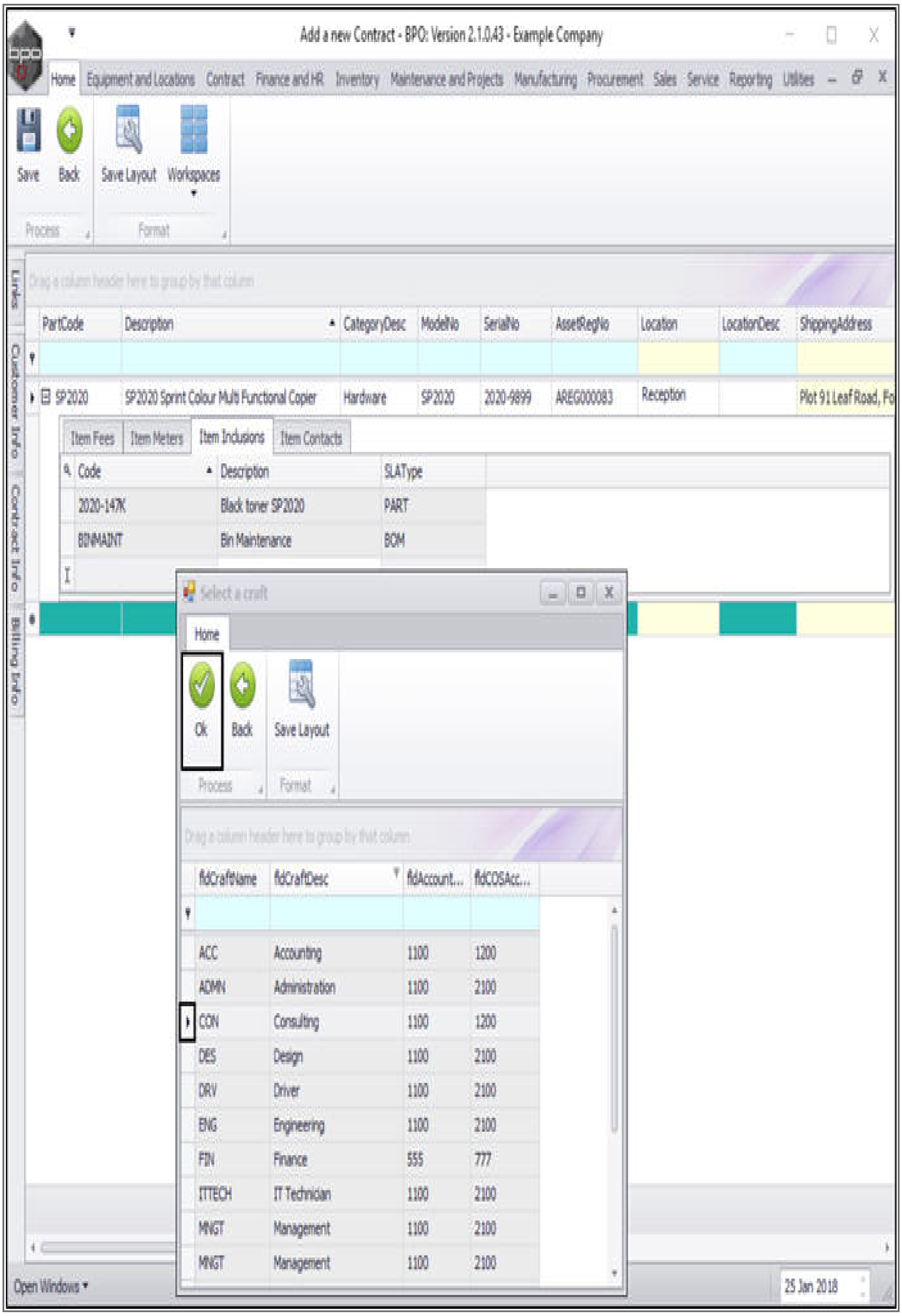
- ***Right click*** anywhere in a row of the Item Inclusions frame.
- The ***Process*** menu will pop up.
- Click on ***Craft*** - Add Craft Inclusion (time logged on a call that will not be billed).


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
Process
Part
Add Part Inclusion
BOM
Add BOM Inclusion
Craft
Add Craft Inclusion
Service
Add Service Inclusion
Delete
Delete Inclusion
Open Windows
25 Jan 2018

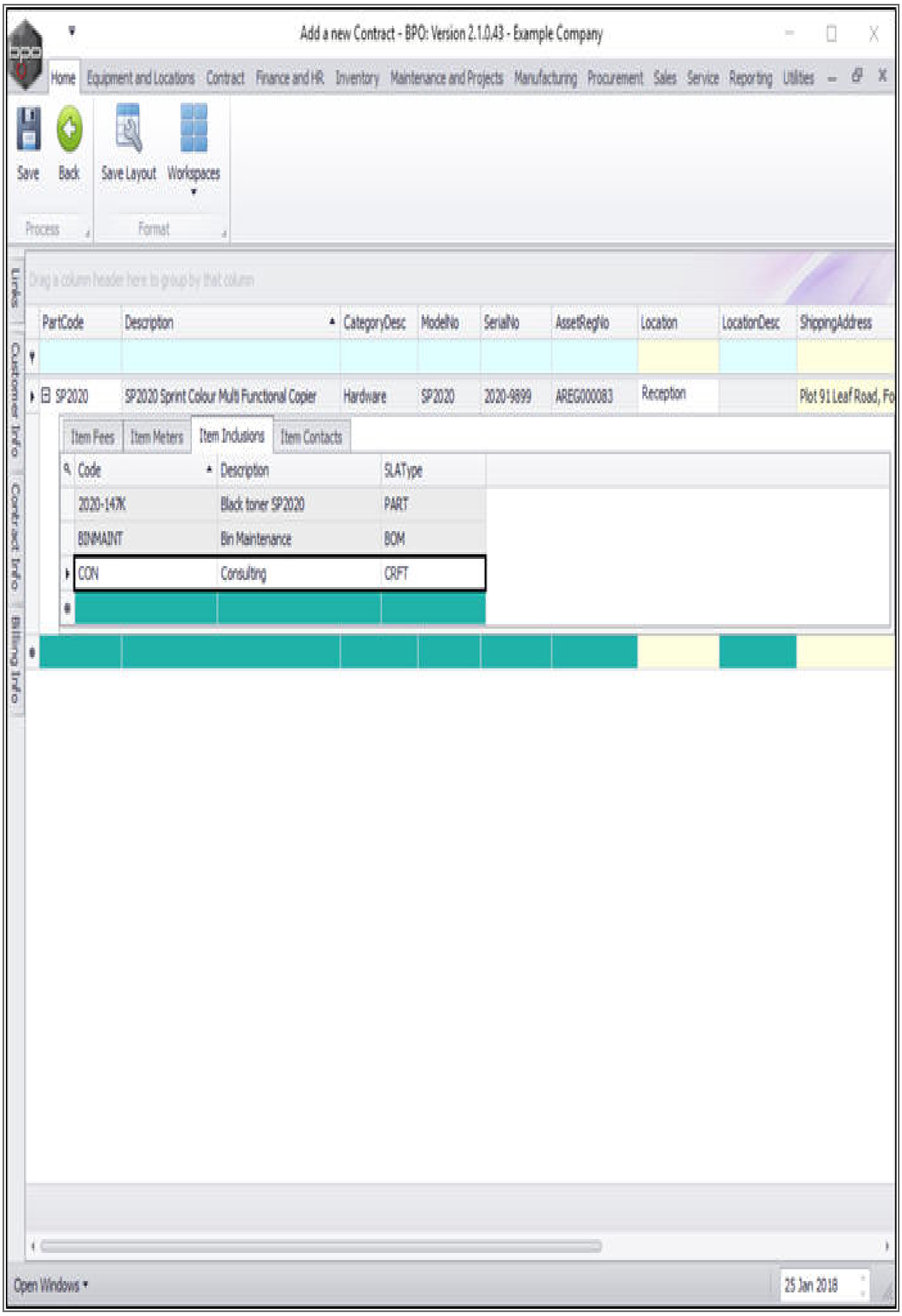
- An ***Input Validation*** message box will pop up asking;
    - ***Are you sure you want to add a Craft inclusion to this item - [ ]?***
- Click on ***Yes***.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
Input Validation
Are you sure you want to add a Craft inclusion to this item - 2020-9899?
Yes
No
Open Windows
25 Jan 2018

- A ***Select a craft*** screen will pop up.
- Click on the ***row selector*** in front of the ***craft*** you wish to ***add*** to this contract as an ***inclusion***.
- Click on ***Ok***.

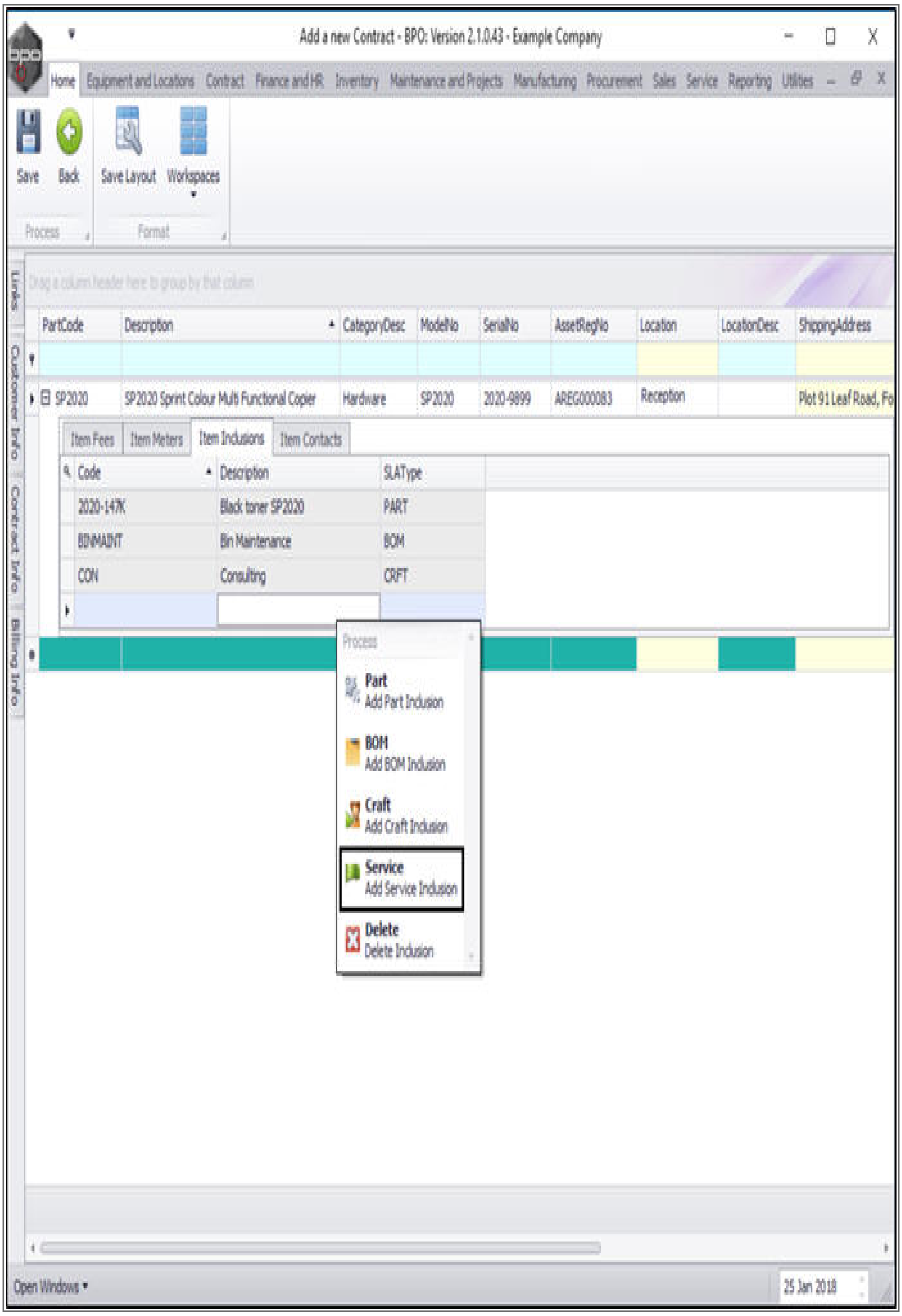


- The selected Craft will be added to the Item Inclusions frame.

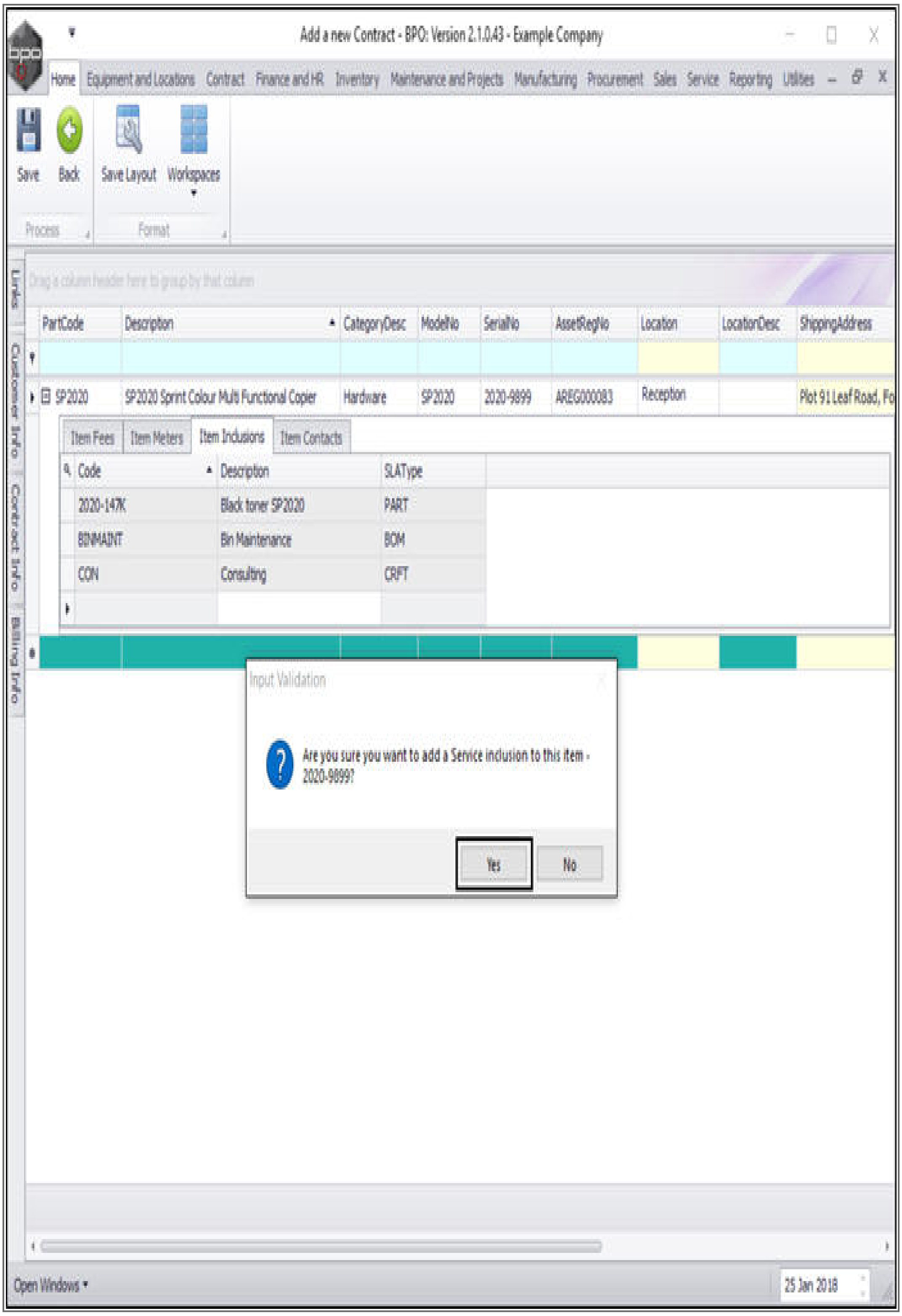

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
CON
Consulting
CRFT
Open Windows
25 Jan 2018

Add Service Inclusion

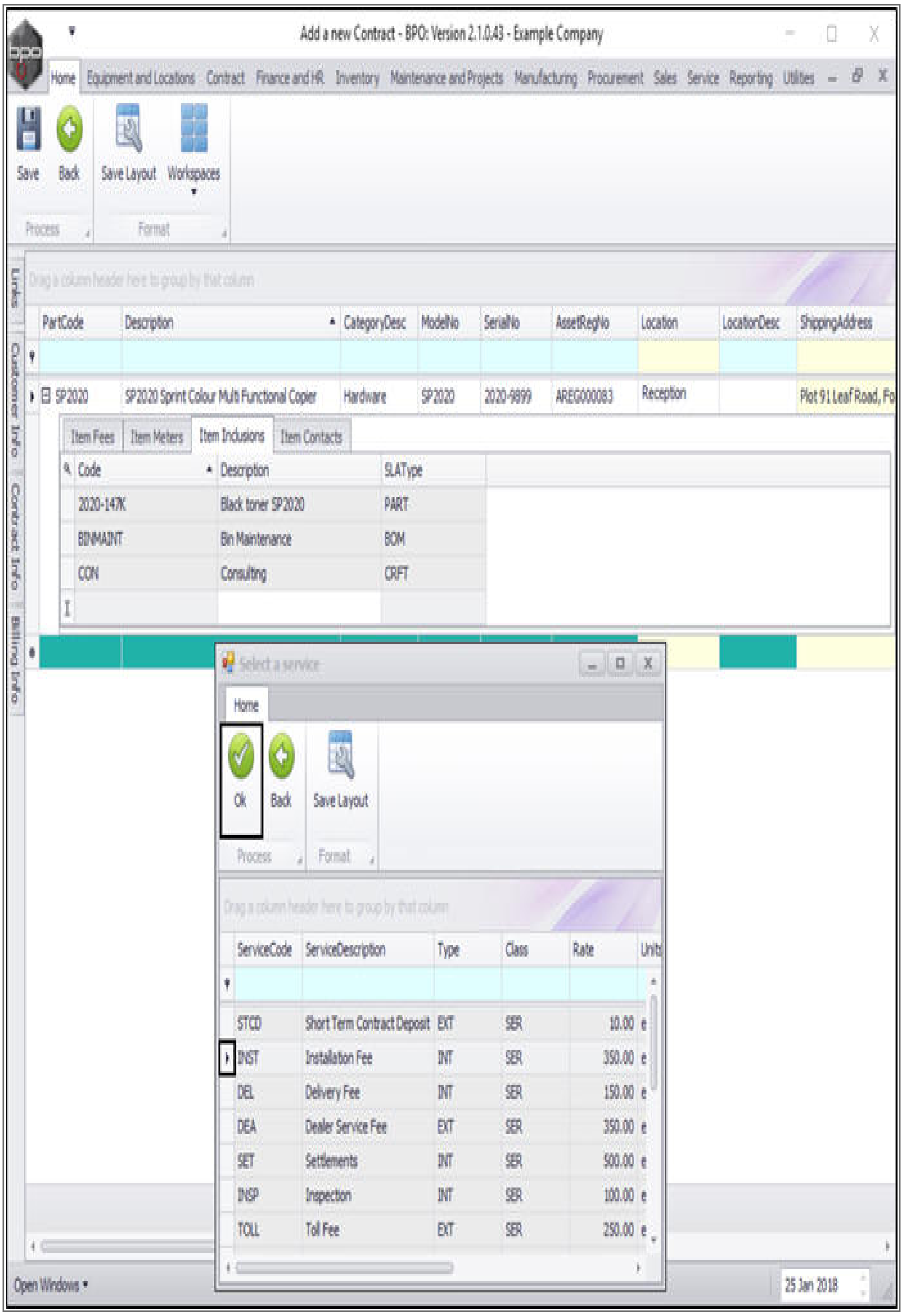
- ***Right click*** anywhere in a ***row*** of the ***Item Inclusions*** frame.
- The ***Process*** menu will pop up.
- Click on ***Service*** - Add Service Inclusion (services logged on a call that will not be billed).


Add a new Contract - BPO: Version 2.1.0.43 - 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 CategoryDesc ModelNo SerialNo AssetRegNo Location LocationDesc ShippingAddress
SP2020 SP2020 Sprint Colour Multi Functional Copier Hardware SP2020 2020-9899 AREG000083 Reception Plot 91 Leaf Road, Fo
Item Fees Item Meters Item Inclusions Item Contacts
Code Description SLAType
2020-147K Black toner SP2020 PART
BINMAINT Bin Maintenance BOM
CON Consulting CRFT
Process
Part
Add Part Inclusion
BOM
Add BOM Inclusion
Craft
Add Craft Inclusion
Service
Add Service Inclusion
Delete
Delete Inclusion
Open Windows
25 Jan 2018

- An ***Input Validation*** message box will pop up asking;
    - ***Are you sure you want to add a Service inclusion to this item - [ ]?***
- Click on ***Yes***.

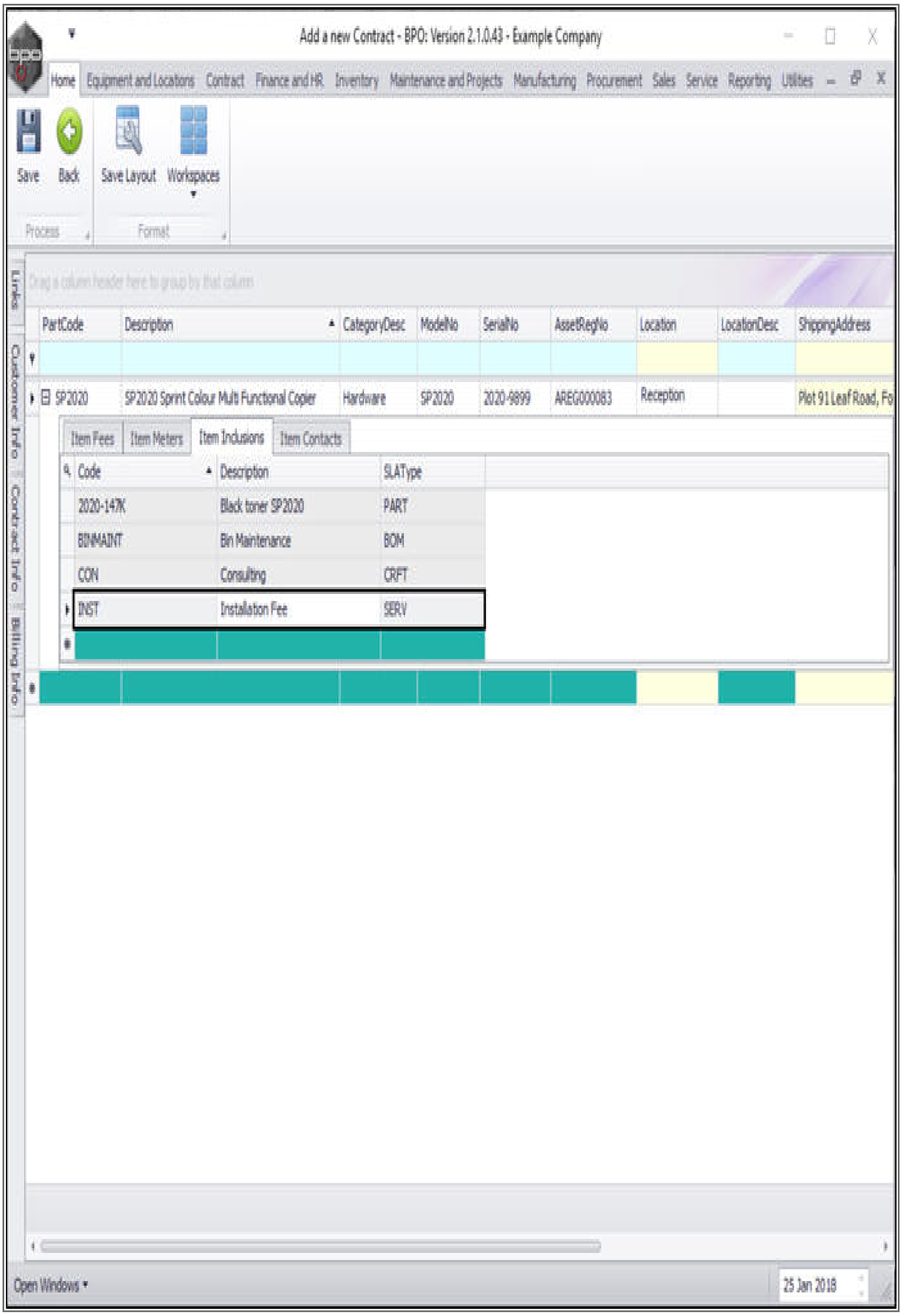

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
CON
Consulting
CRFT
Input Validation
Are you sure you want to add a Service inclusion to this item - 2020-9899?
Yes
No
Open Windows
25 Jan 2018

- A ***Select a service*** screen will pop up.
- Click on the ***row selector*** in front of the ***service*** you wish to ***add*** to this contract as an ***inclusion***.
- Click on ***Ok***.



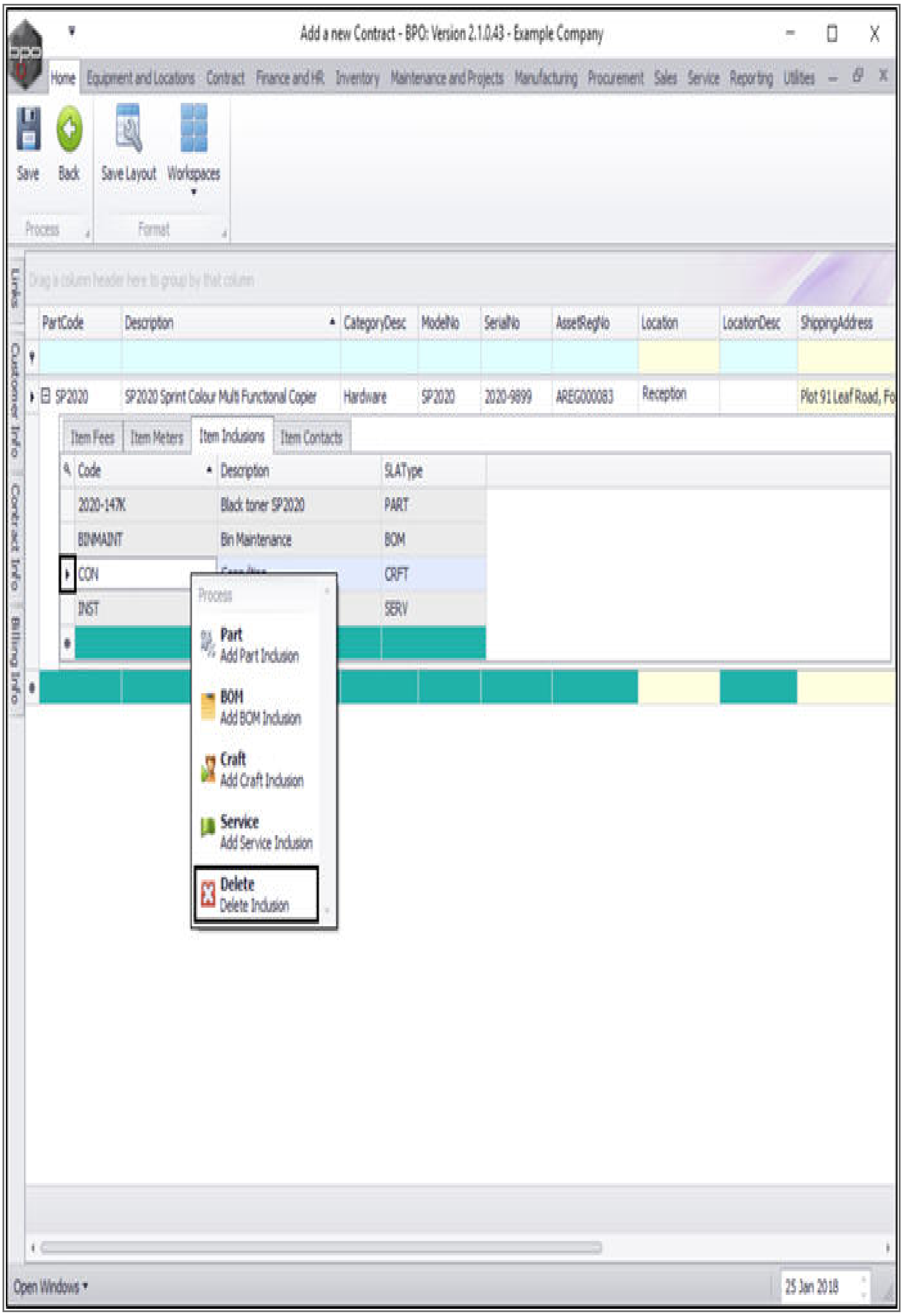
- The selected Service will be added to the Item Inclusions frame.

- **Note:** You can add more than one of each type of item inclusion to the contract.

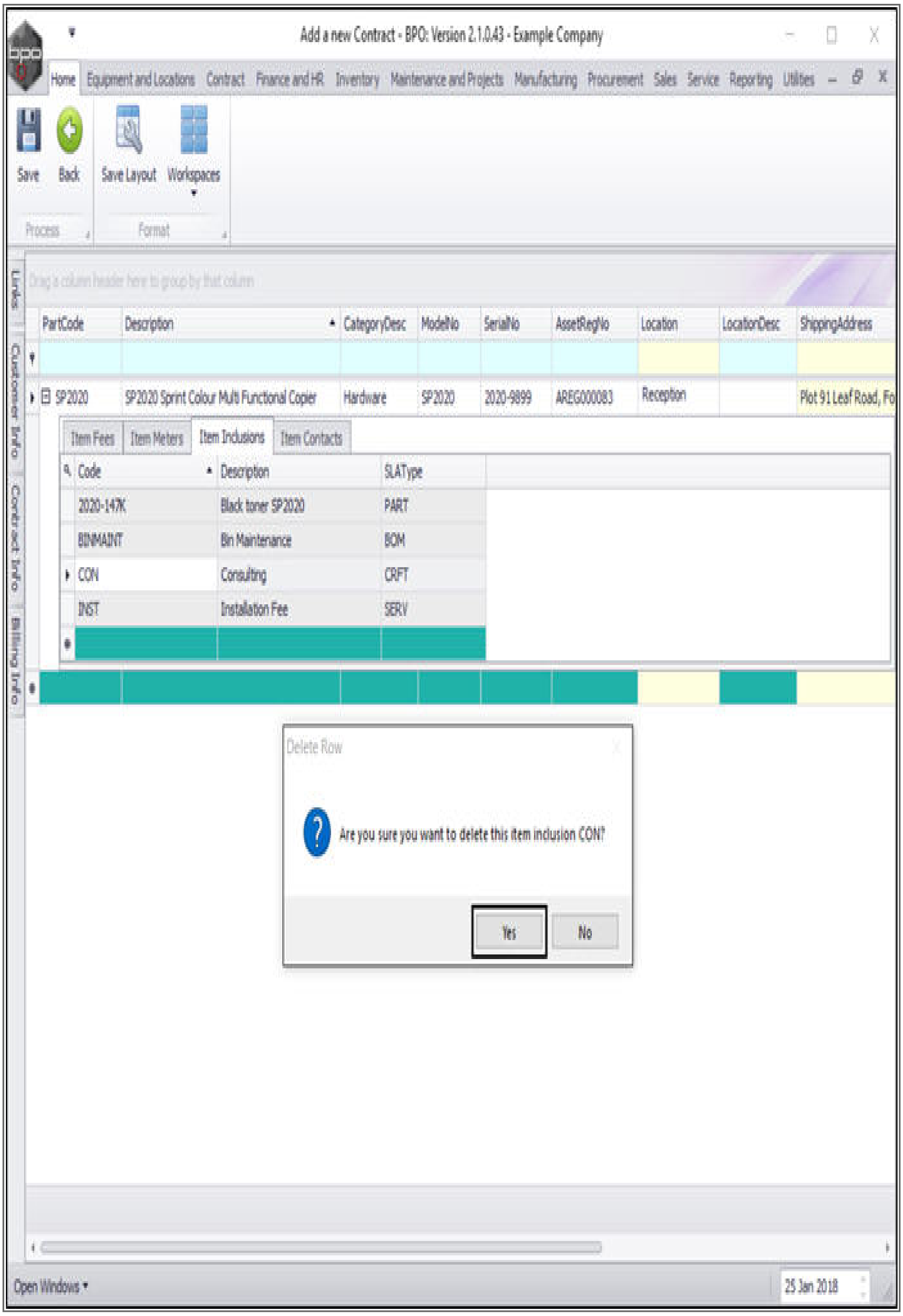


Delete Inclusion

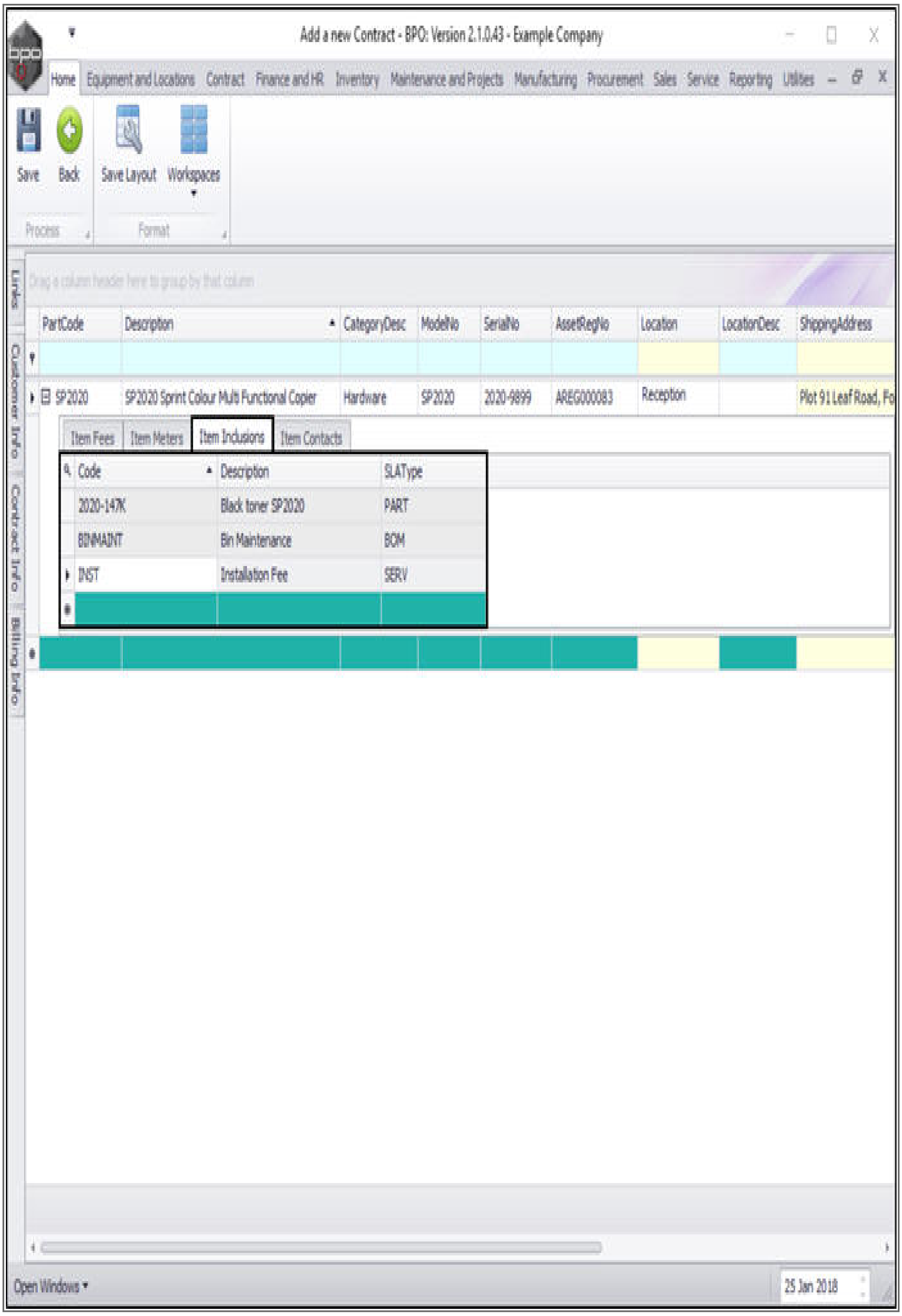
- The final option in the ***Item Inclusions Process*** menu is ***Delete*** Inclusion.
- ***Right click*** in the ***row*** of the ***item inclusion*** that you wish to ***delete*** from the contract.
    - In this image ***CON*** - Consulting has been selected.
- The ***Process*** menu will pop up.
- Click on ***Delete*** - Delete Inclusion.


Add a new Contract - BPO: Version 2.1.0.43 - 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
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
CON
CRFT
INST
SERV
Part
Add Part Inclusion
BOM
Add BOM Inclusion
Craft
Add Craft Inclusion
Service
Add Service Inclusion
Delete
Delete Inclusion
Open Windows
25 Jan 2018

- An ***Input Validation*** message box will pop up asking;
  - ***Are you sure you want to delete this item inclusion - [ ]?***
- Click on ***Yes***.

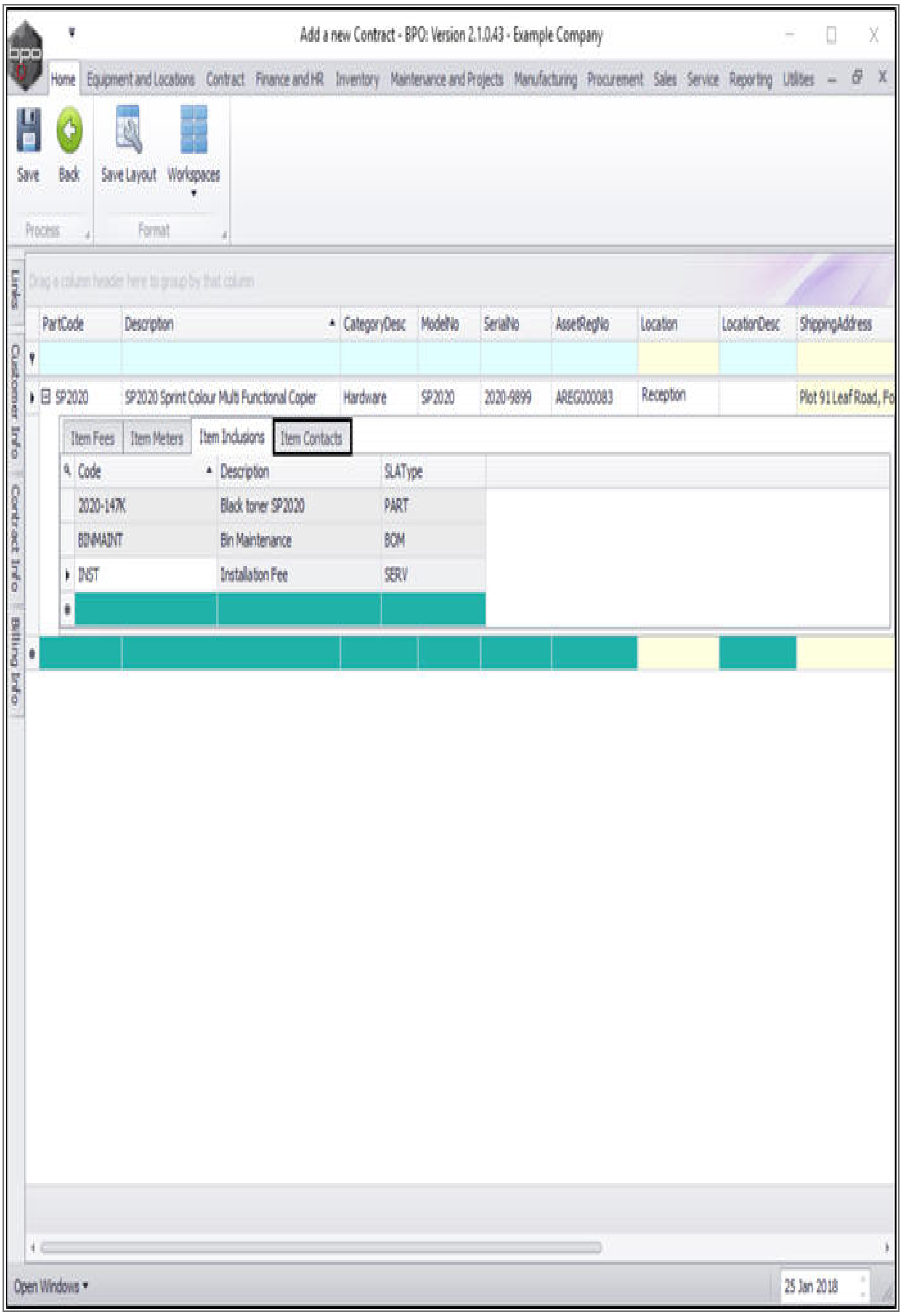

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
CON
Consulting
CRFT
INST
Installation Fee
SERV
Links
Customer Info
Contract Info
Billing Info
Delete Row
Are you sure you want to delete this item inclusion CON?
Yes
No
Open Windows
25 Jan 2018

- The selected item will now be ***removed*** from the ***Item Inclusions*** frame.

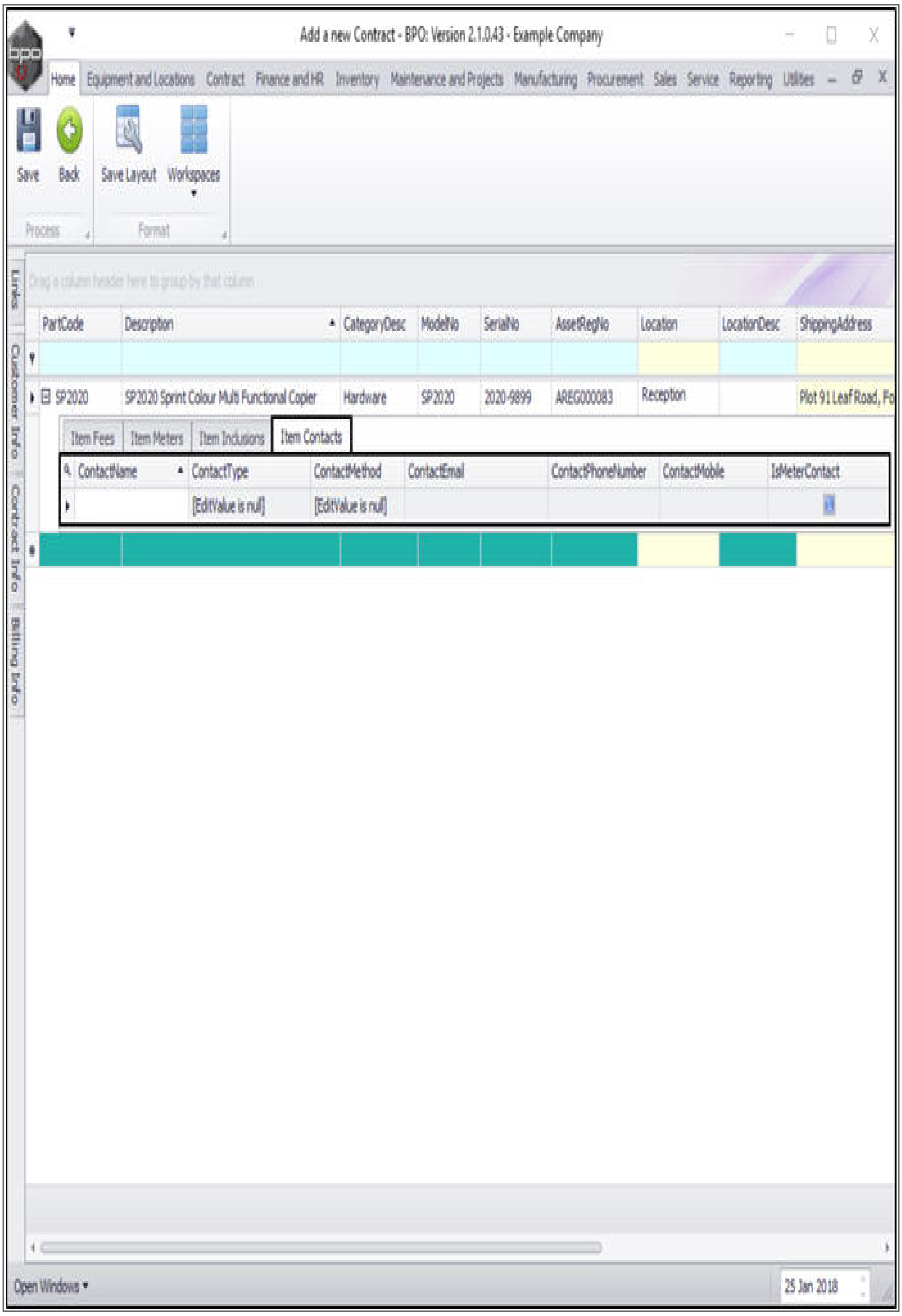

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
Code
Description
SLAType
2020-147K
Black toner SP2020
PART
BINMAINT
Bin Maintenance
BOM
INST
Installation Fee
SERV
Open Windows
25 Jan 2018

ITEM CONTACTS

- When you have finished working in the Items Inclusions frame, click on the ***Item Contacts*** tab.

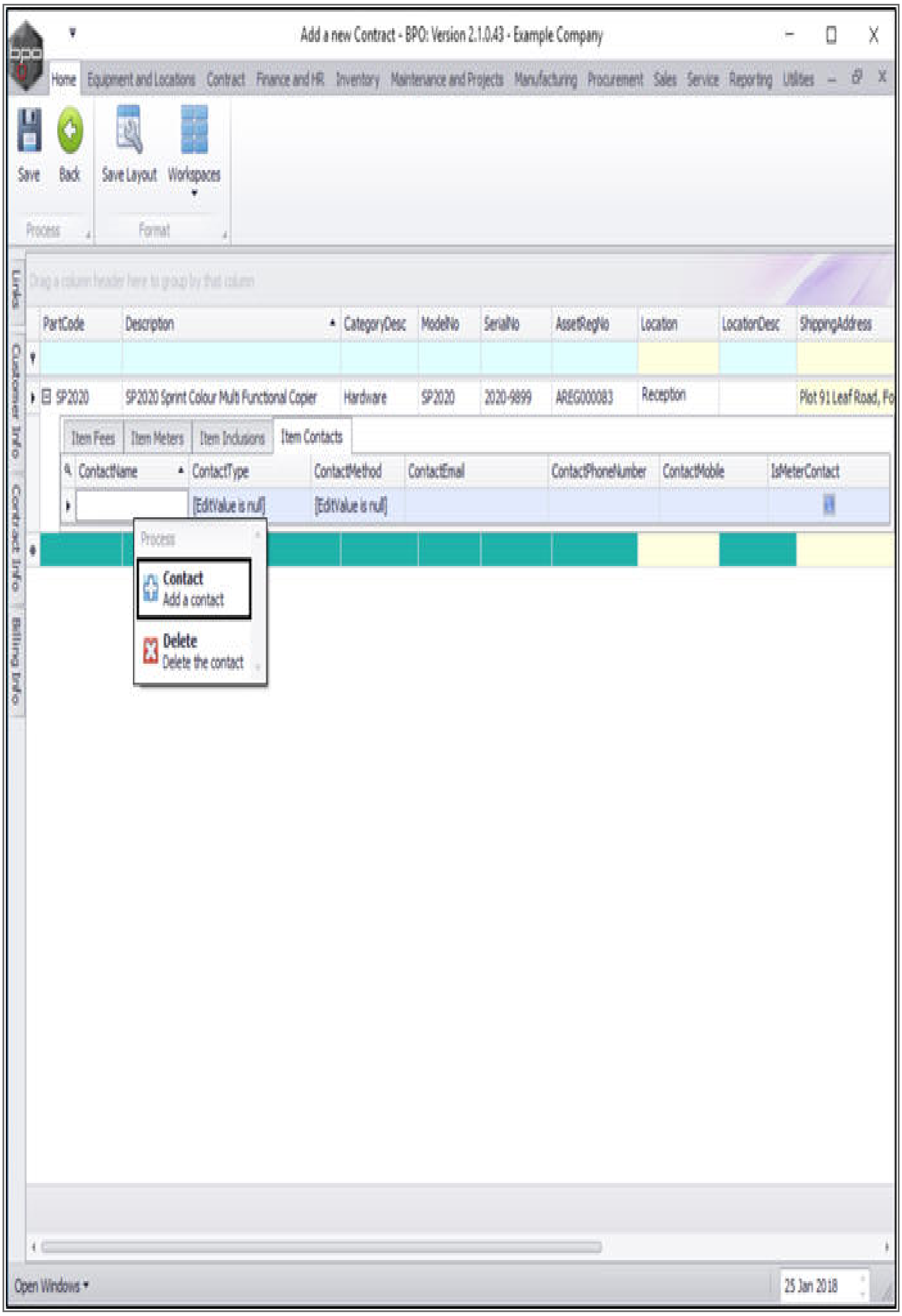


- The Item Contacts frame will be ***expanded***.

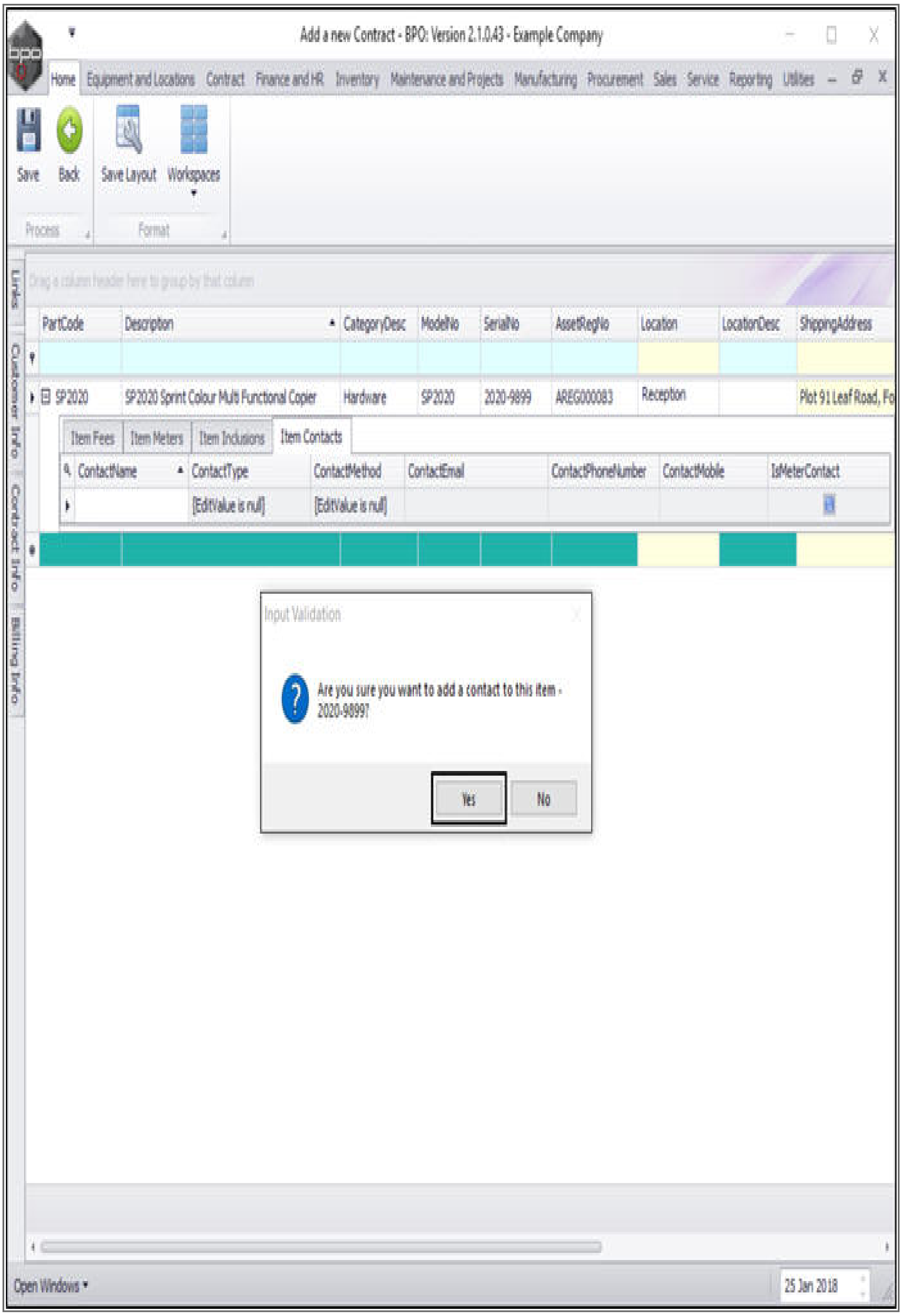

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
[EditValue is null]
[EditValue is null]
Open Windows
25 Jan 2018

Add a Contact

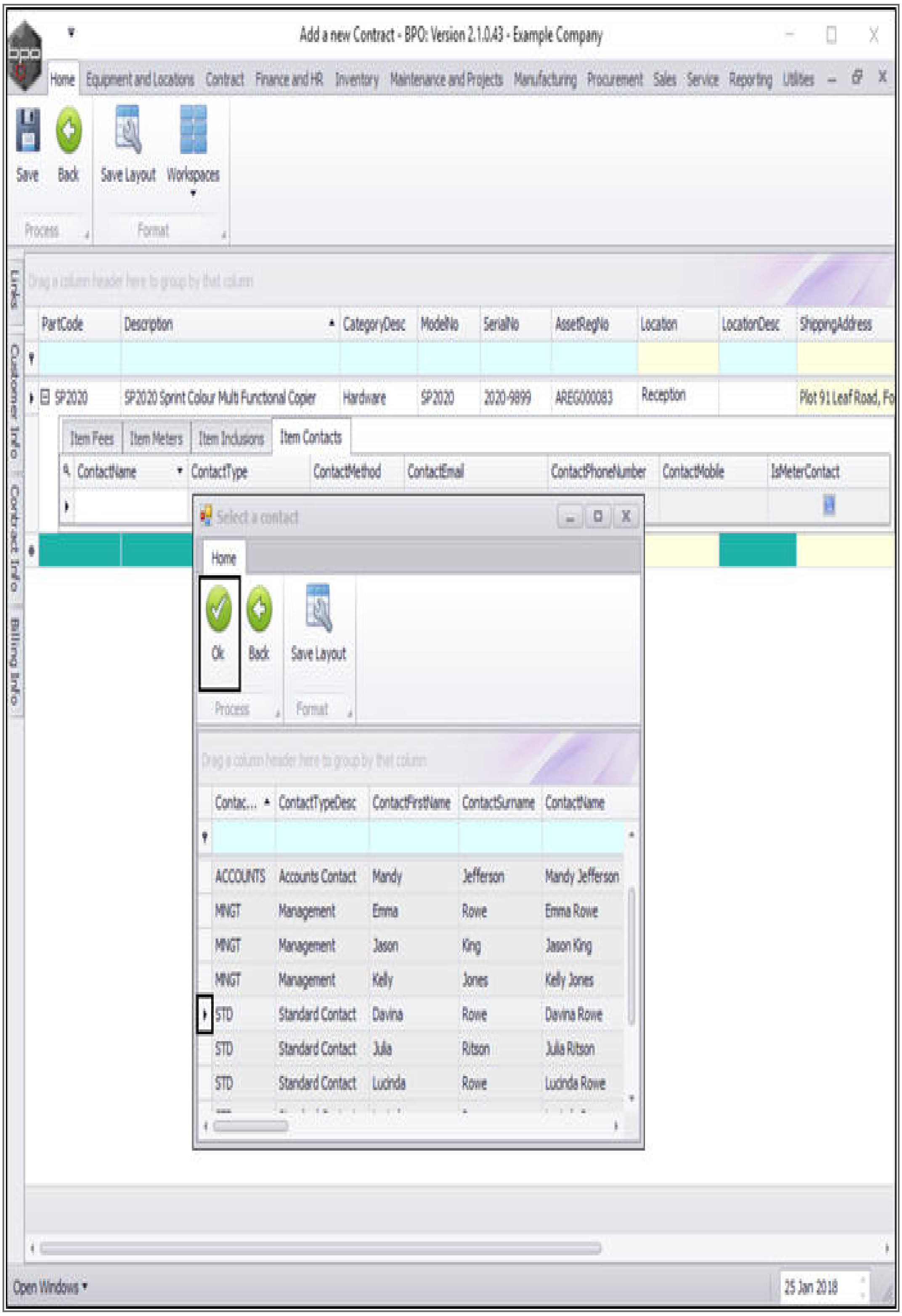
- ***Right click*** anywhere in the first ***row*** of the ***Item Contacts*** frame.
- A ***Process*** menu will pop up.
- Click on ***Contact*** - Add a contact.



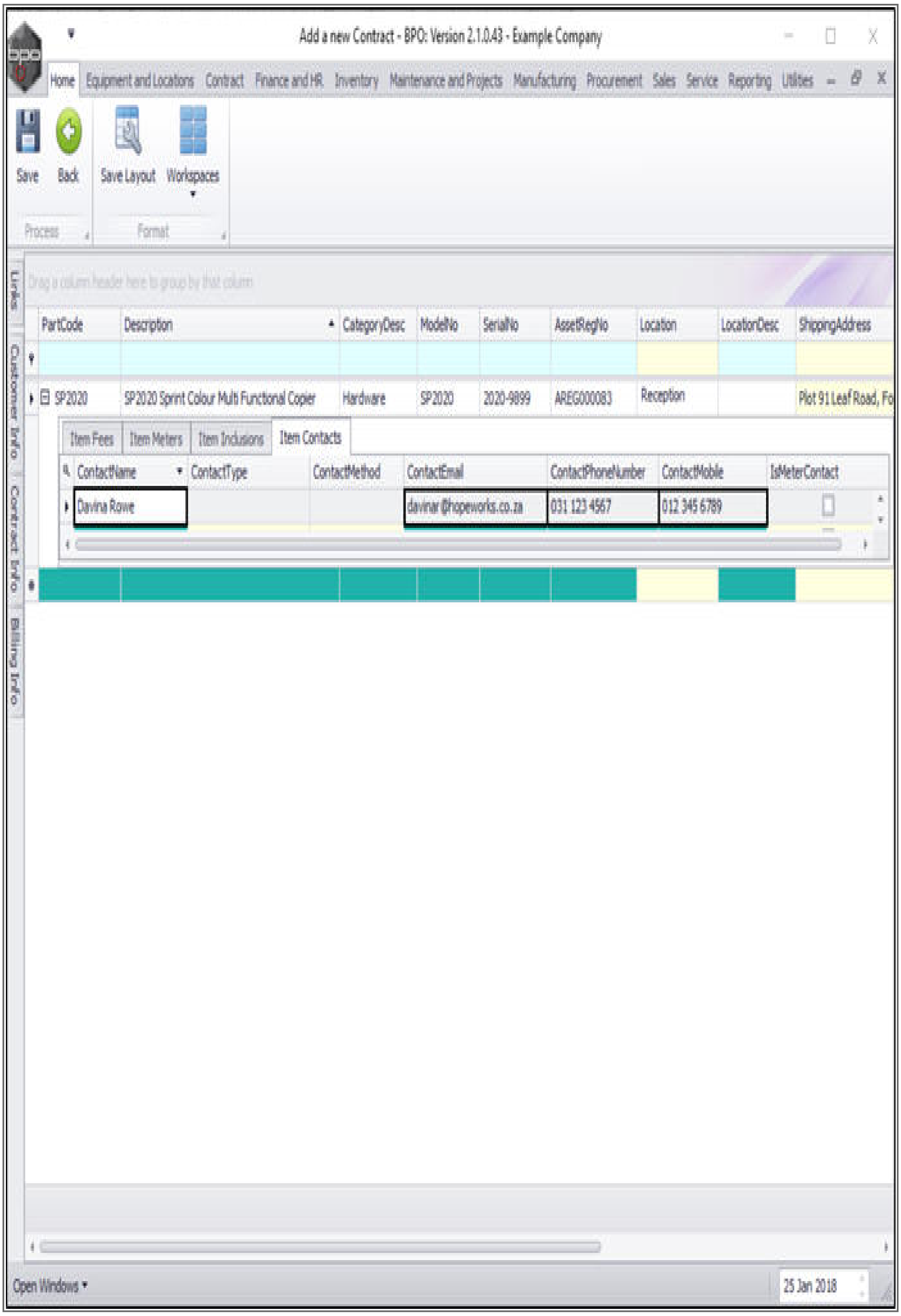
- A **Process Validation** message box will pop up asking;
    - ***Are you sure you want to add a contact to this item - [ ]?***
- Click on ***Yes***.


Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Input Validation
Are you sure you want to add a contact to this item - 2020-9899?
Yes
No

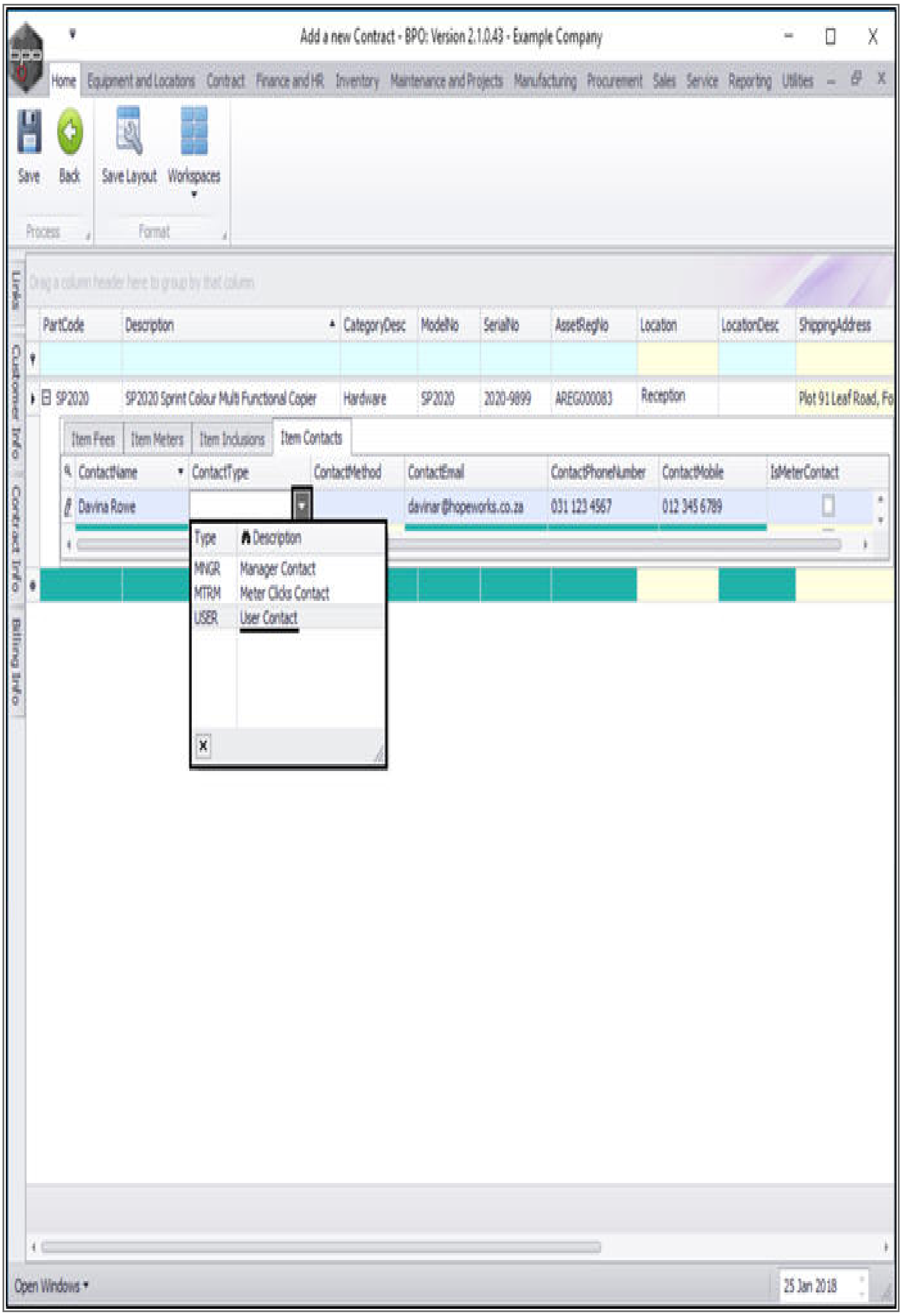
- A **Select a contact** pop up screen will appear.
- Click on the ***row selector*** in front of the ***contact*** you wish to ***add***.
- Click on ***Ok***.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Select a contact
Home
Ok
Back
Save Layout
Process
Format
Drag a column header here to group by that column
Contac...
ContactTypeDesc
ContactFirstName
ContactSurname
ContactName
ACCOUNTS
Accounts Contact
Mandy
Jefferson
Mandy Jefferson
MNGT
Management
Emma
Rowe
Emma Rowe
MNGT
Management
Jason
King
Jason King
MNGT
Management
Kelly
Jones
Kelly Jones
STD
Standard Contact
Davina
Rowe
Davina Rowe
STD
Standard Contact
Julia
Ritson
Julia Ritson
STD
Standard Contact
Lucinda
Rowe
Lucinda Rowe
Open Windows
25 Jan 2018

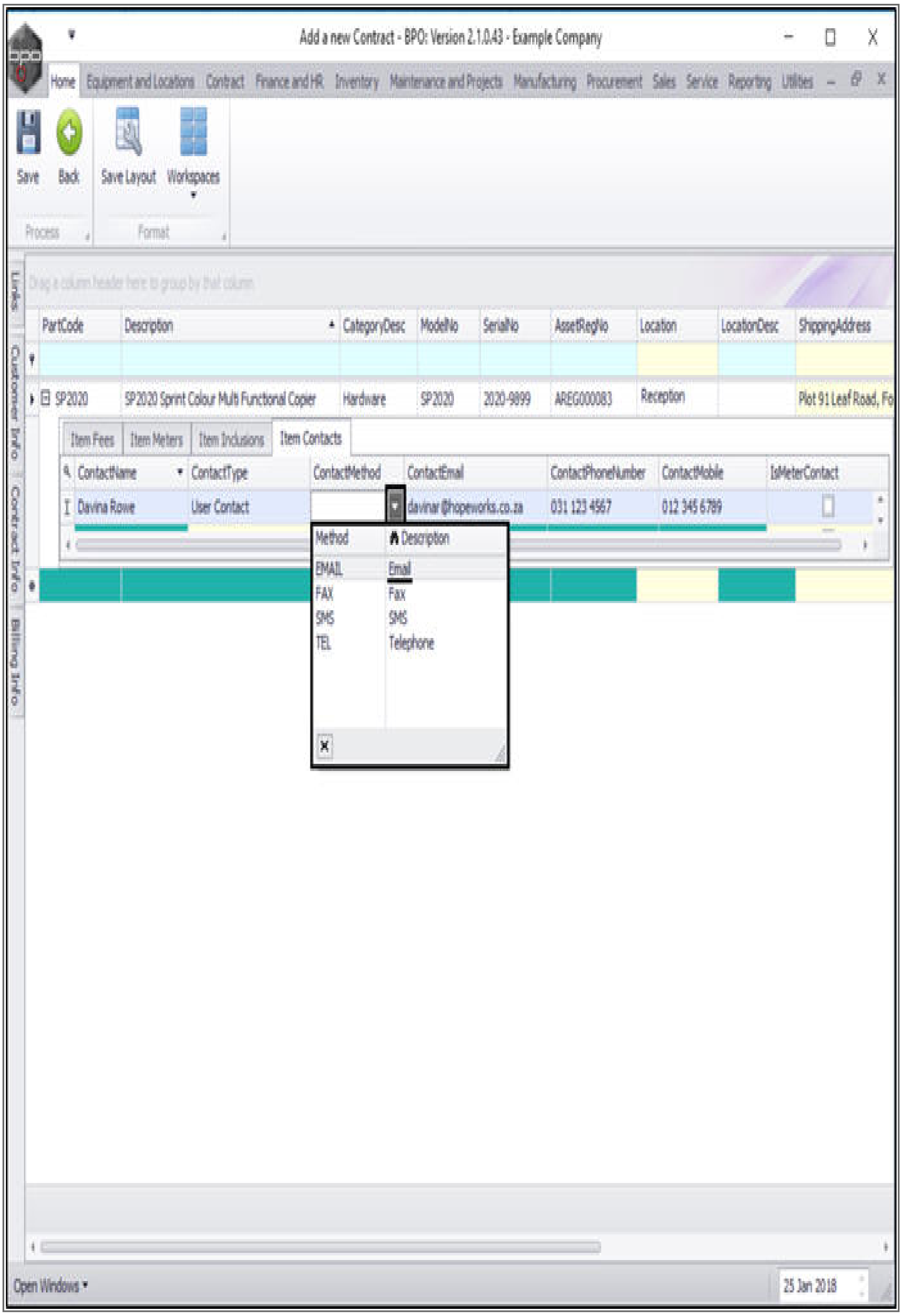
- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address already set up on the selected contact.
- **Contact Phone Number:** This will auto populate with the phone number already set up on the selected contact.
- **Contact Mobile:** This will auto populate with the mobile number already set up on the selected contact.



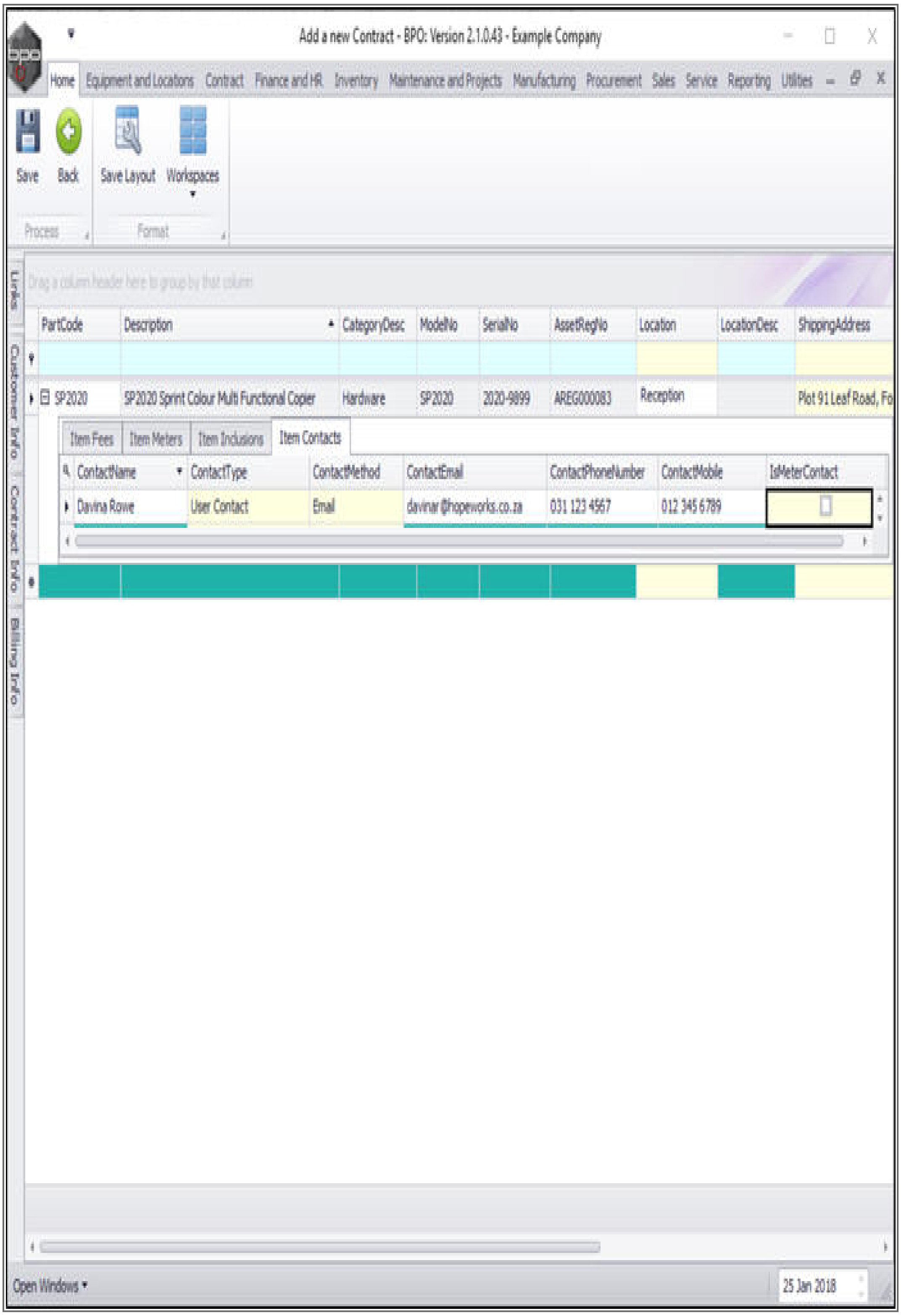
- Click in the ***Contact Type*** text box to reveal a drop-down arrow.
- Click on this arrow to display a ***Contact Type*** drop-down ***menu***.
- Click on the ***contact type*** you wish to assign to this Item.
    - In this image ***User Contact*** has been selected.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Davina Rowe
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Type
Description
MNGR
Manager Contact
MTRM
Meter Clicks Contact
USER
User Contact
Open Windows
25 Jan 2018

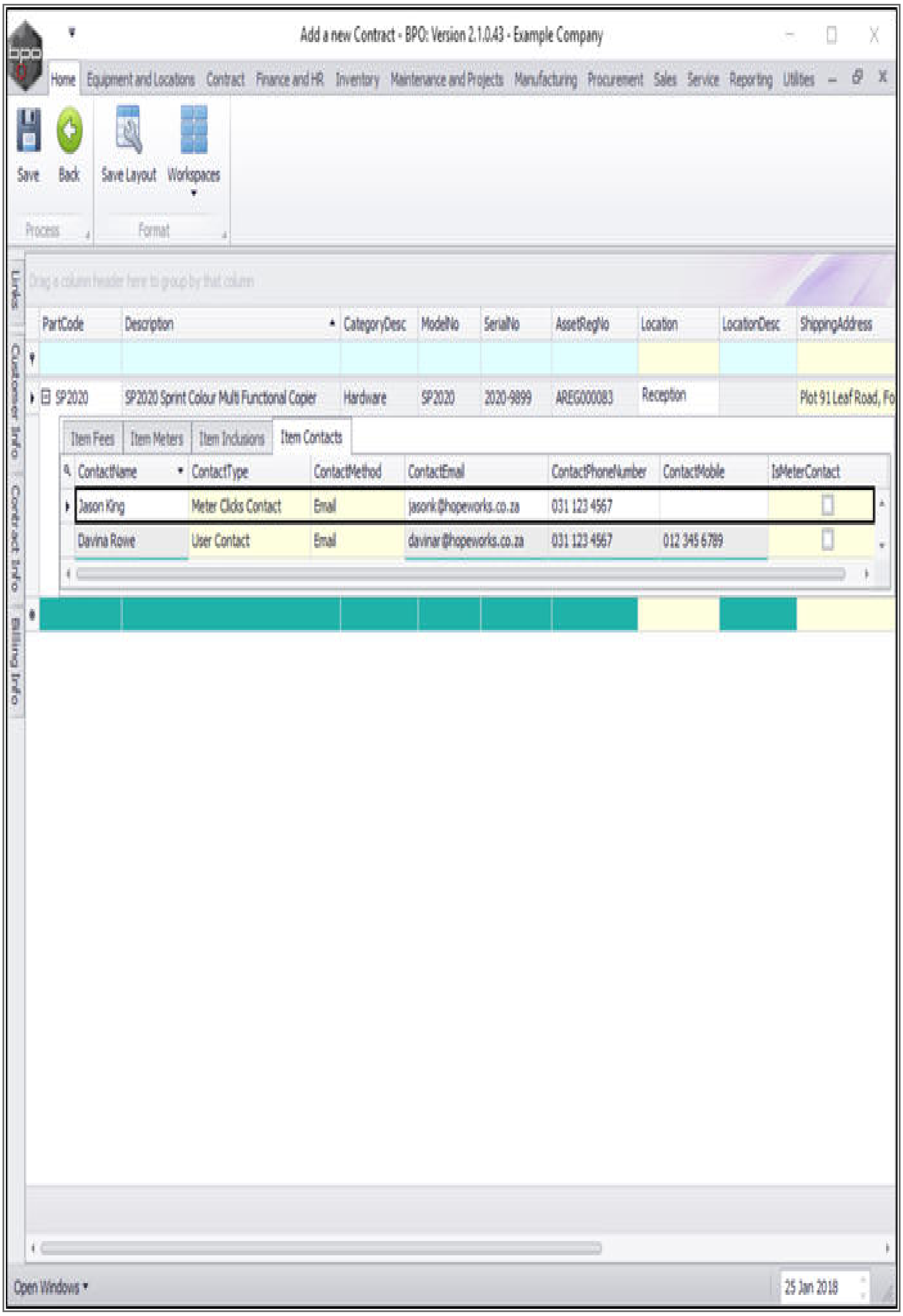
- Click in the ***Contact Method*** text box to reveal a drop-down arrow.
- Click on this arrow to display a ***Contact Method*** drop-down ***menu***.
- Click on the ***preferred contact method*** you wish to use.
  - In this image ***Email*** has been selected.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Davina Rowe
User Contact
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Method
Description
EMAIL
Email
FAX
Fax
SMS
SMS
TEL
Telephone
Open Windows
25 Jan 2018

- **Is Meter Contact:** Click on this check box to see the contact in the relevant ***month end billing run meter*** capture screens and reports.

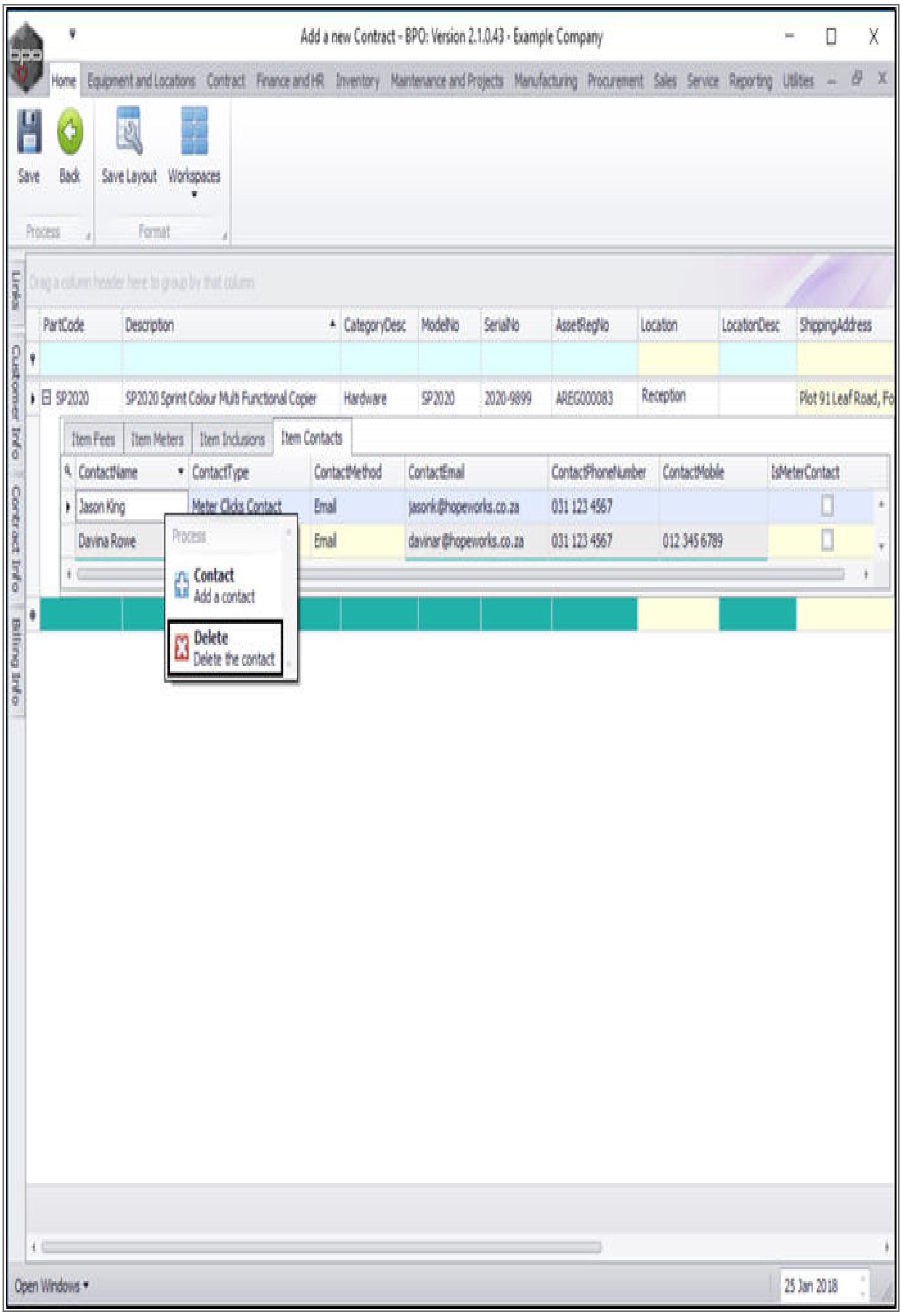

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Davina Rowe
User Contact
Email
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Open Windows
25 Jan 2018

- You can add further contacts to this frame by ***right clicking*** anywhere in a ***row*** of the ***Item Contacts*** frame and following the same process as above.
    - In this image a ***second contact*** has been added.

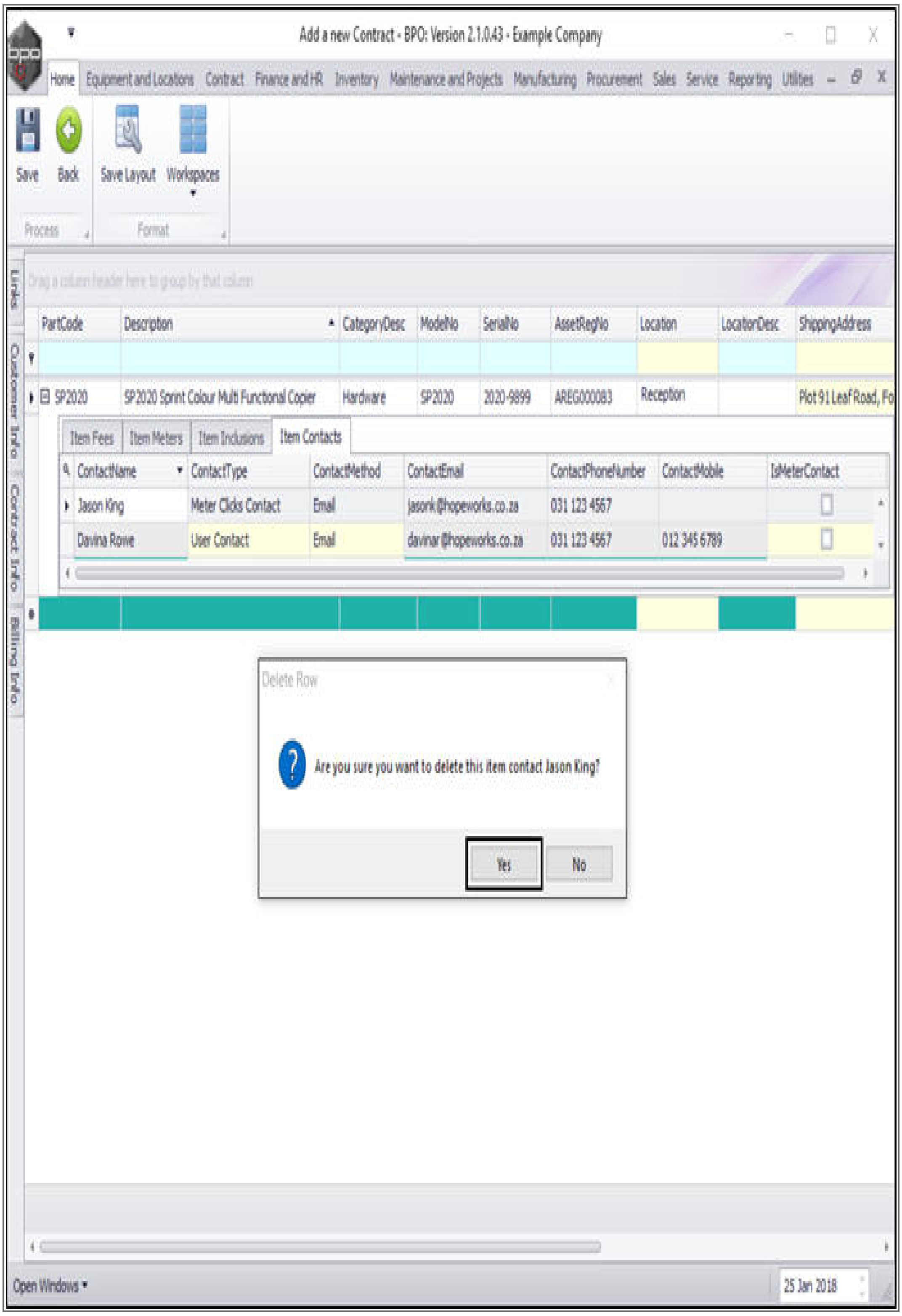

Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Jason King
Meter Clicks Contact
Email
jasonk@hopeworks.co.za
031 123 4567
Davina Rowe
User Contact
Email
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Open Windows
25 Jan 2018

Delete a Contact

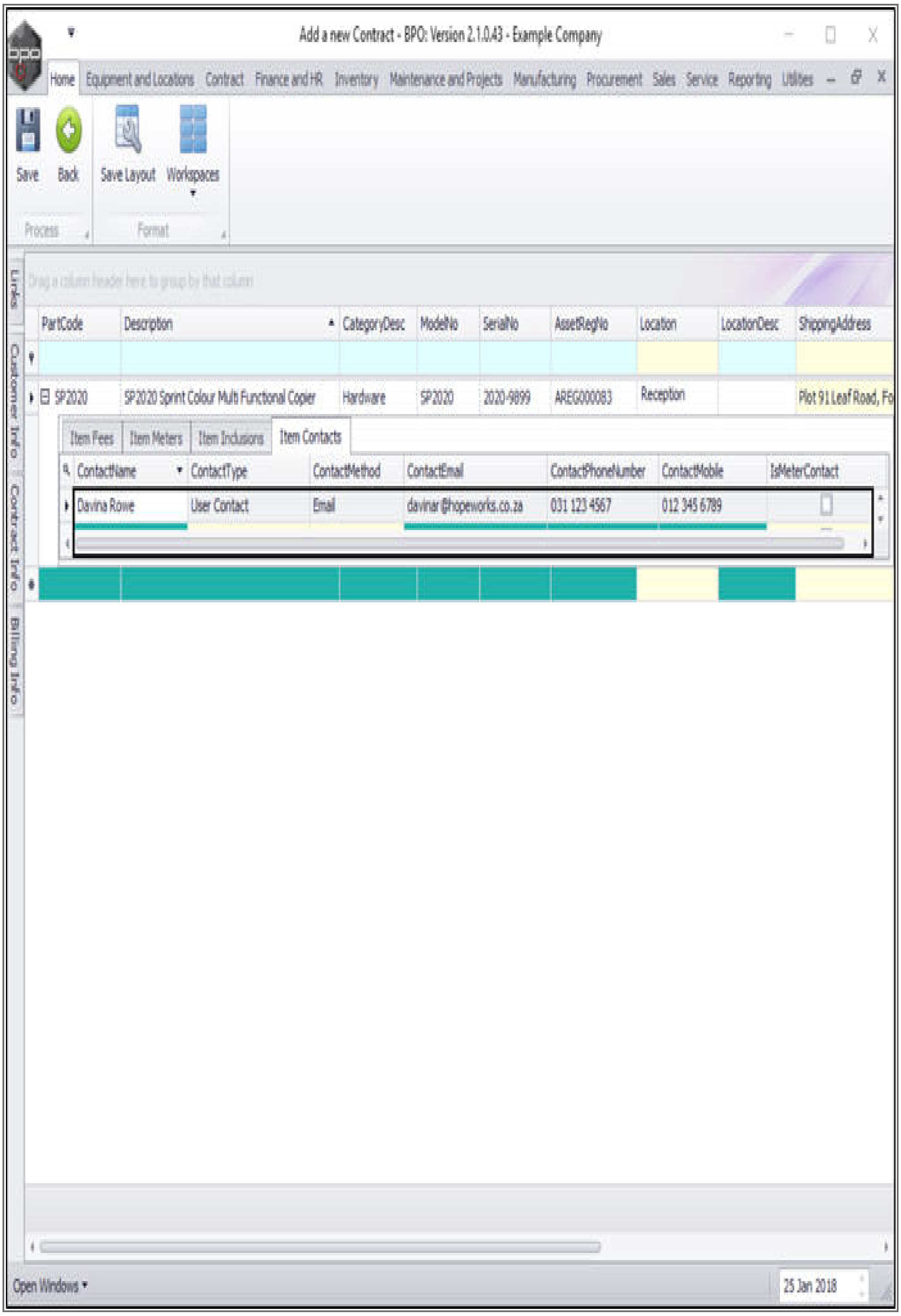
- You can also ***delete*** a contact if required.
- ***Right click*** in the ***row*** of the ***contact*** you wish to ***delete***.
- The ***Process*** menu will pop up.
- Click on ***Delete*** - Delete the contact.


Add a new Contract - BPO: Version 2.1.0.43 - 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
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Jason King
Meter Clicks Contact
Email
jasonk@hopeworks.co.za
031 123 4567
Davina Rowe
Email
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Process
Contact
Add a contact
Delete
Delete the contact
Links
Customer Info
Contract Info
Billing Info
Open Windows
25 Jan 2018

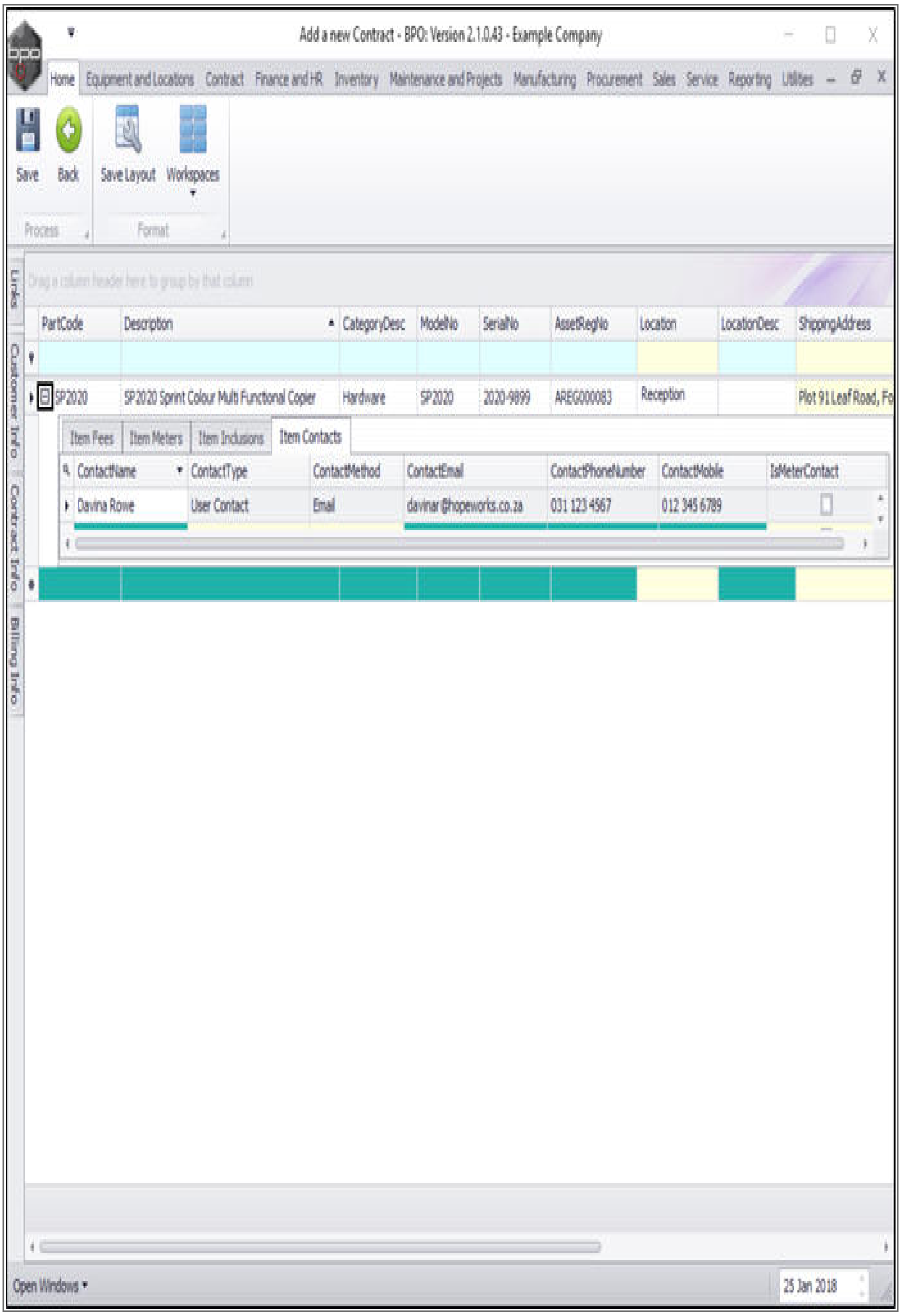
- A ***Delete Row*** message box will pop up asking;
    - ***Are you sure you want to delete this item contact [ ]?***
- Click on ***Yes***.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Jason King
Meter Clicks Contact
Email
jasonk@hopeworks.co.za
031 123 4567
Davina Rowe
User Contact
Email
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Delete Row
Are you sure you want to delete this item contact Jason King?
Yes
No
Open Windows
25 Jan 2018

- The contact has now been ***deleted*** from the Items Contacts frame.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
2020-9899
AREG000083
Reception
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Davina Rowe
User Contact
Email
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Open Windows
25 Jan 2018

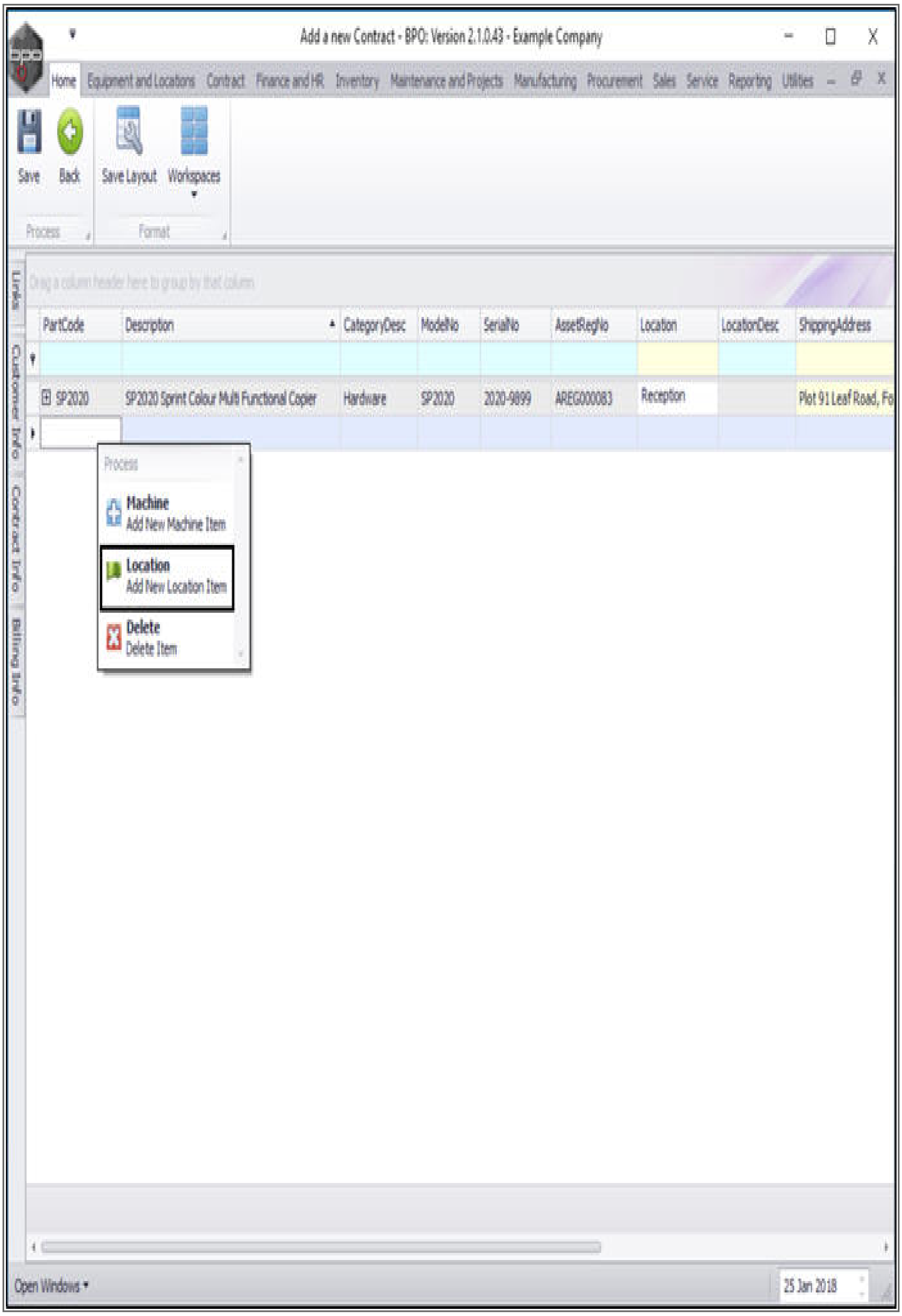
- When you have finished working in the machine Item Frames, click on the ***hide*** button in the part code text box.



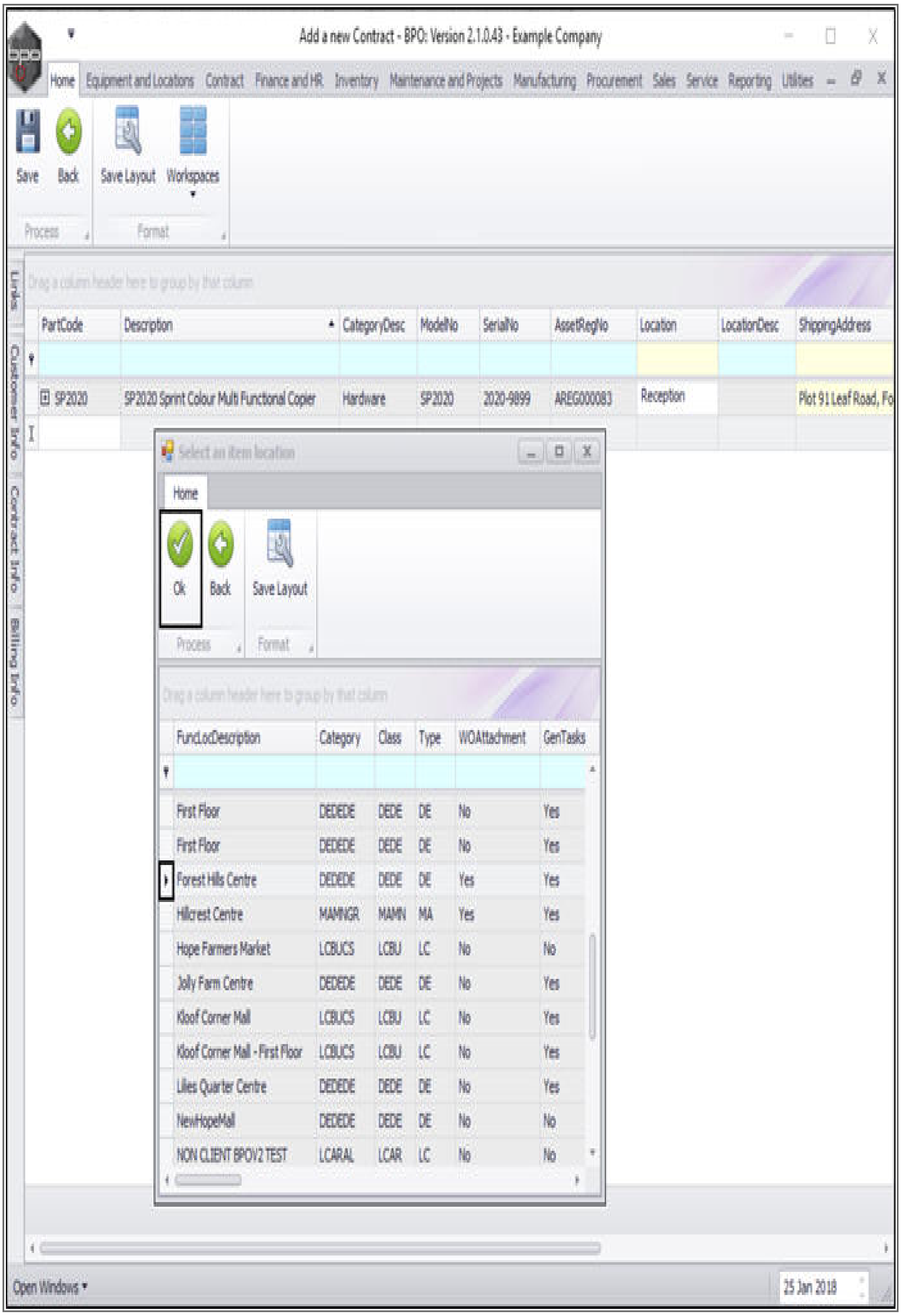
Add a new Contract - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Workspaces
Process
Format
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Item Fees
Item Meters
Item Inclusions
Item Contacts
ContactName
ContactType
ContactMethod
ContactEmail
ContactPhoneNumber
ContactMobile
IsMeterContact
Davina Rowe
User Contact
Email
davinar@hopeworks.co.za
031 123 4567
012 345 6789
Open Windows
25 Jan 2018

ADD NEW LOCATION ITEM

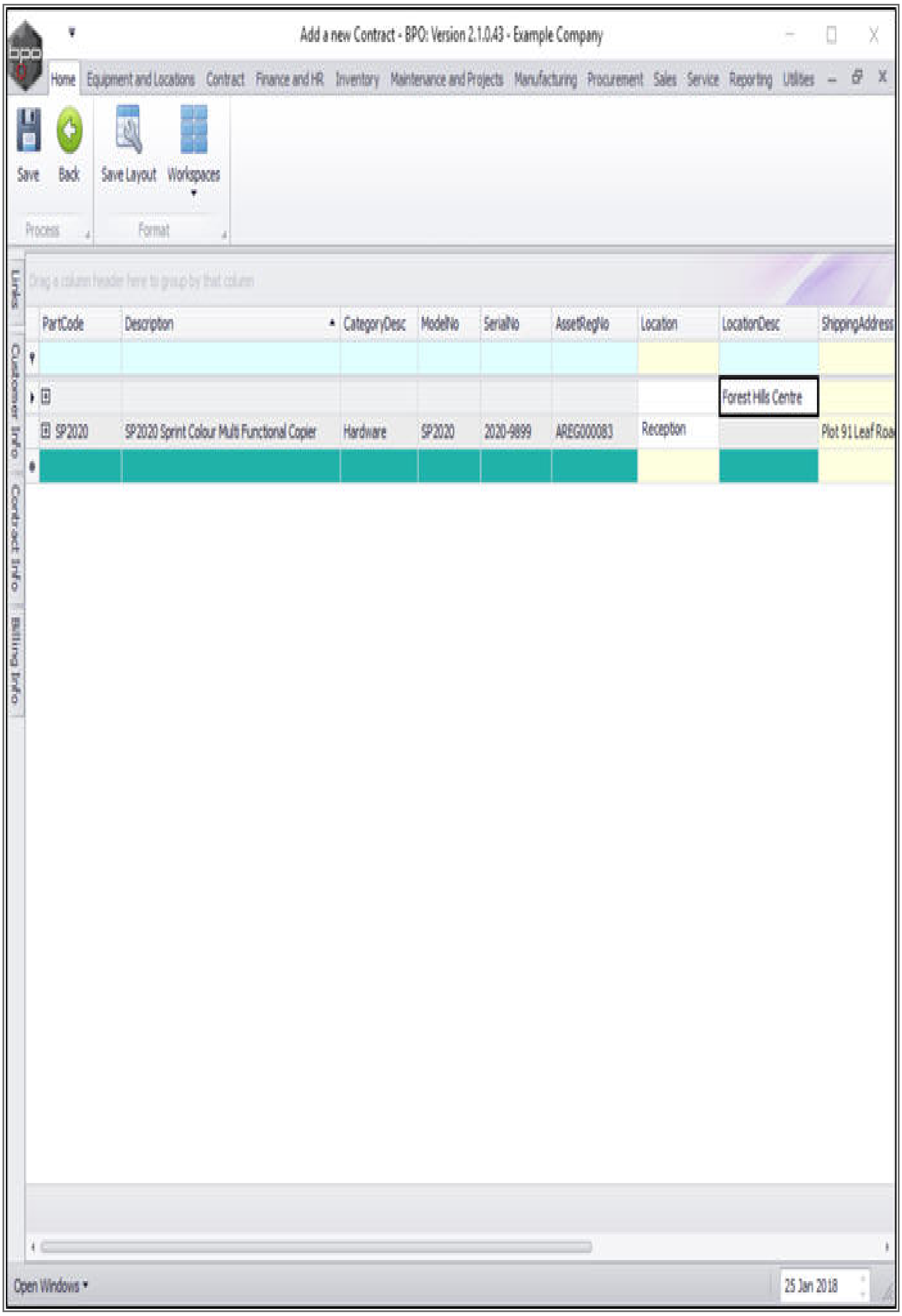
- ***Right click*** in anywhere in a ***row*** of the ***Parts*** frame.
- A ***Process*** menu will pop up.
- Select ***Location*** - Add New Location Item.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Plot 91 Leaf Road, Fo
Process
Machine
Add New Machine Item
Location
Add New Location Item
Delete
Delete Item
Open Windows
25 Jan 2018

- A ***Select an item location*** pop up screen will appear.
- Click on the ***row selector*** in front of the ***item location*** you wish to ***add***.
- Click on ***Ok***.


Add a new Contract - BPO: Version 2.1.0.43 - 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 CategoryDesc ModelNo SerialNo AssetRegNo Location LocationDesc ShippingAddress
SP2020 SP2020 Sprint Colour Multi Functional Copier Hardware SP2020 2020-9899 AREG000083 Reception Plot 91 Leaf Road, Fo
Select an item location
Ok Back Save Layout
FuncLocDescription Category Class Type WOAttachment GenTasks
First Floor DEDEDE DEDE DE No Yes
First Floor DEDEDE DEDE DE No Yes
Forest Hills Centre DEDEDE DEDE DE Yes Yes
Hillcrest Centre MAMNGR MAMN MA Yes Yes
Hope Farmers Market LCBUCS LCBU LC No No
Jolly Farm Centre DEDEDE DEDE DE No Yes
Kloof Corner Mall LCBUCS LCBU LC No Yes
Kloof Corner Mall - First Floor LCBUCS LCBU LC No Yes
Lilies Quarter Centre DEDEDE DEDE DE No Yes
NewHopeMall DEDEDE DEDE DE No No
NON CLIENT BPOV2 TEST LCARAL LCAR LC No No
Links Customer Info Contract Info Billing Info
Open Windows
25 Jan 2018

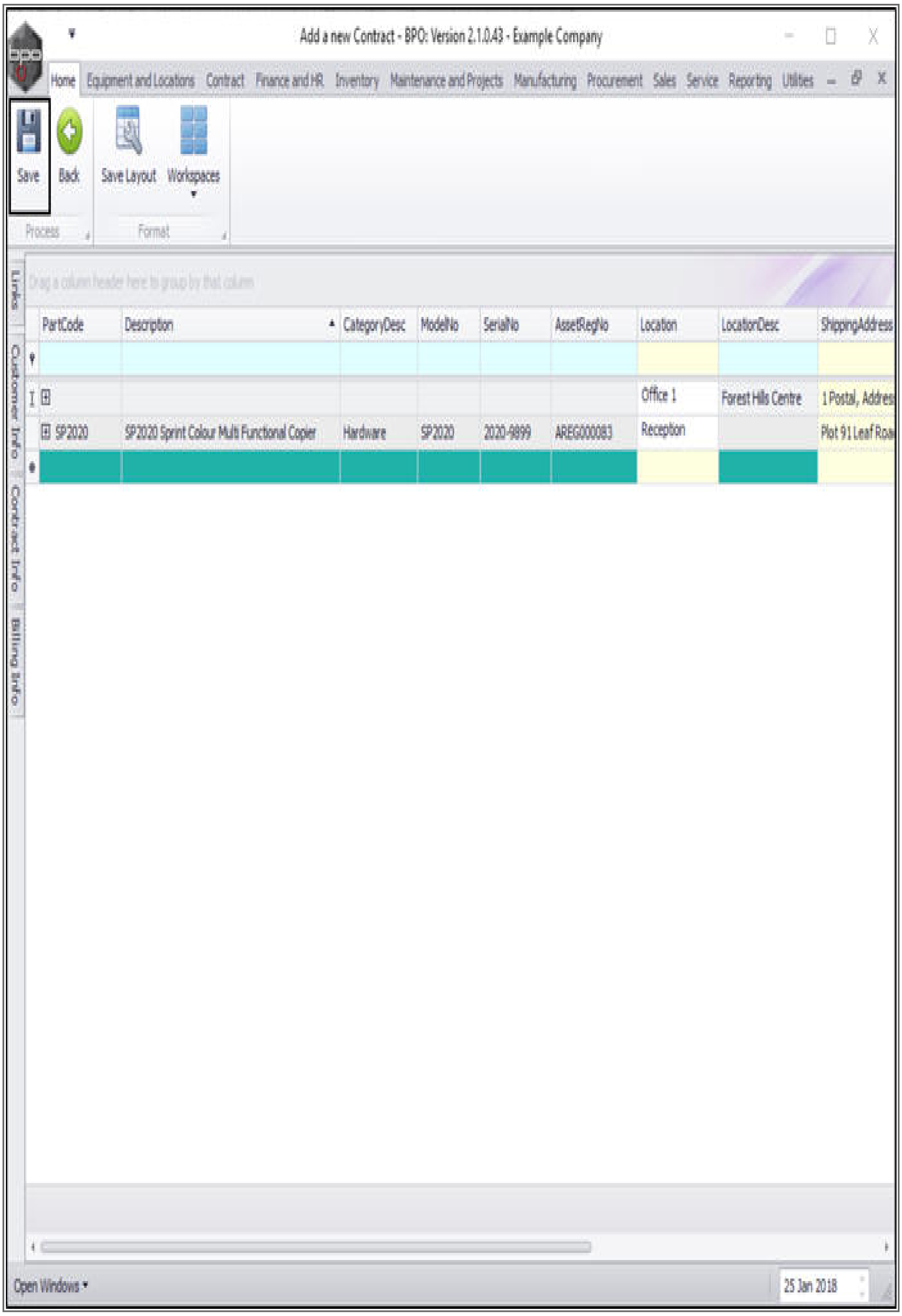
- The selected item location will now populate the ***Location Description*** text box.
- Follow the same processes as above to ***add information*** to this location row as required.
    - **Note**: In the Items Frame, there will be no option to add Item Meters as this is a Location Contract not a Machine Contract.



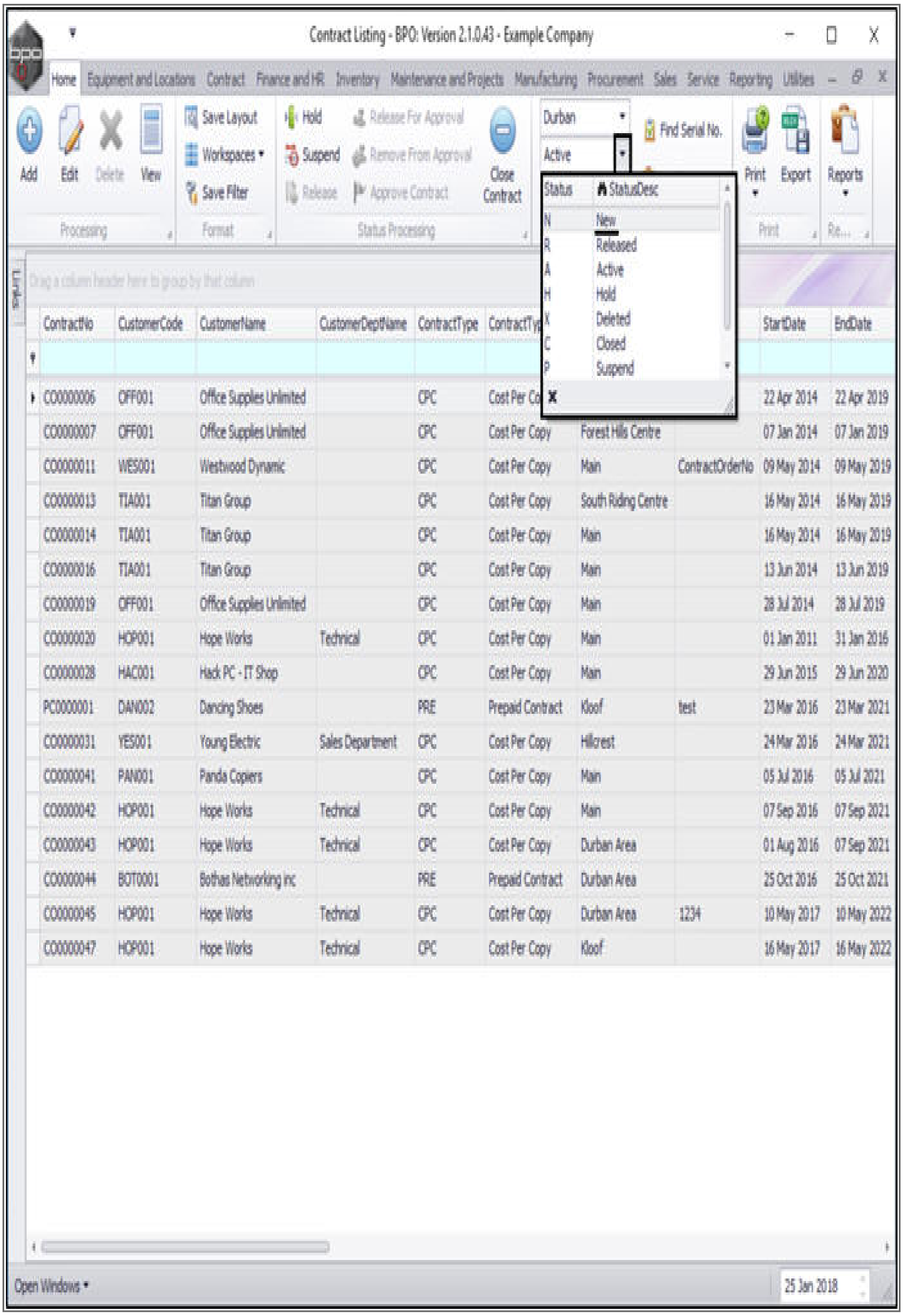
- You can continue to add contract machine items or contract location items as required, however additional items can also be added later.

SAVE THE CONTRACT

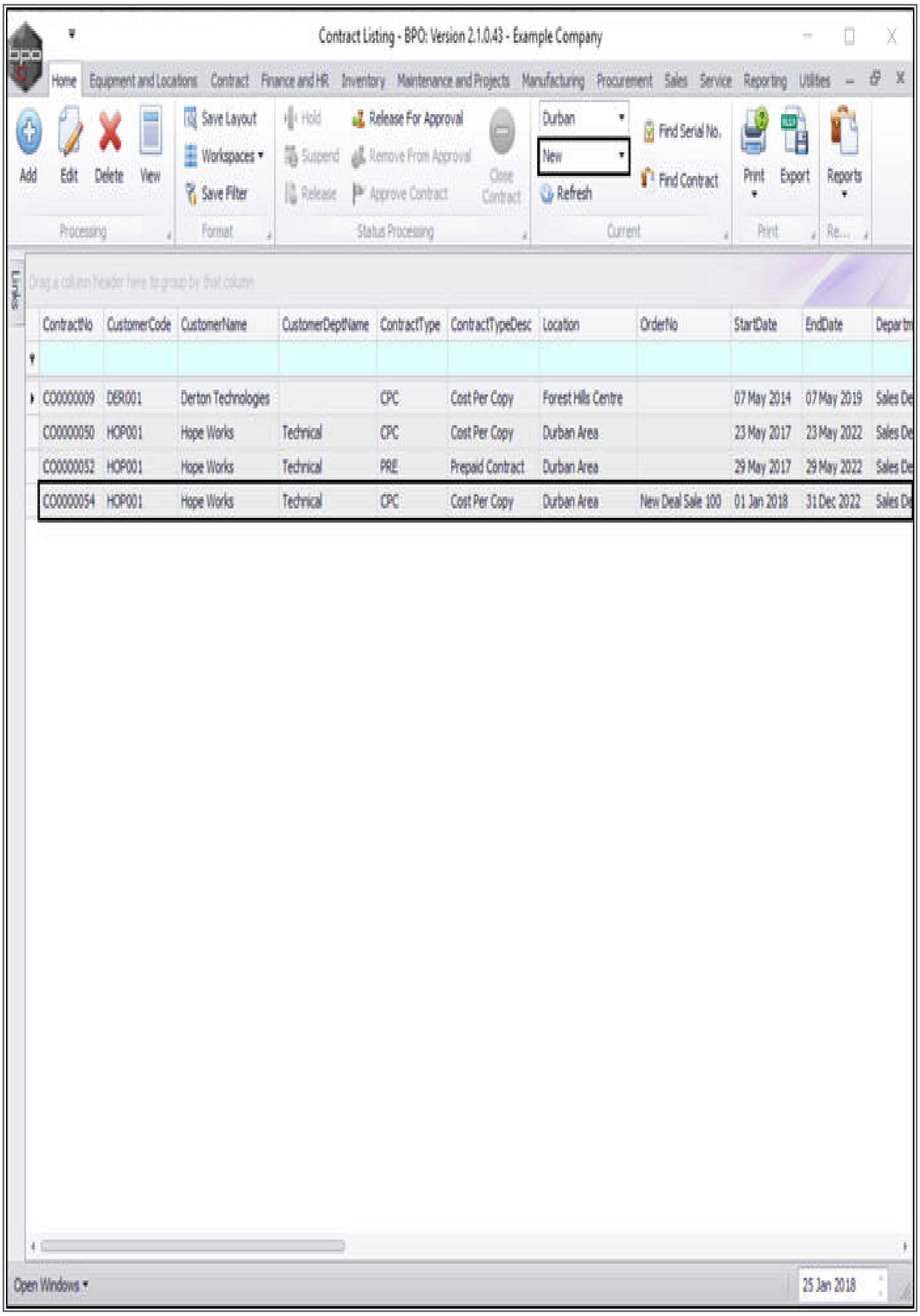
- When you are finished, click on ***Save***.


Add a new Contract - BPO: Version 2.1.0.43 - 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
Links
Customer Info
Contract Info
Billing Info
Drag a column header here to group by that column
PartCode
Description
CategoryDesc
ModelNo
SerialNo
AssetRegNo
Location
LocationDesc
ShippingAddress
Office 1
Forest Hills Centre
SP2020
SP2020 Sprint Colour Multi Functional Copier
Hardware
SP2020
2020-9899
AREG000083
Reception
Open Windows
25 Jan 2018

- The new contract will be ***saved*** and you will return to the ***Contract Listing*** screen where the status defaults to ***Active***.
- Click on the drop-down arrow in the status field and select the ***New*** status.

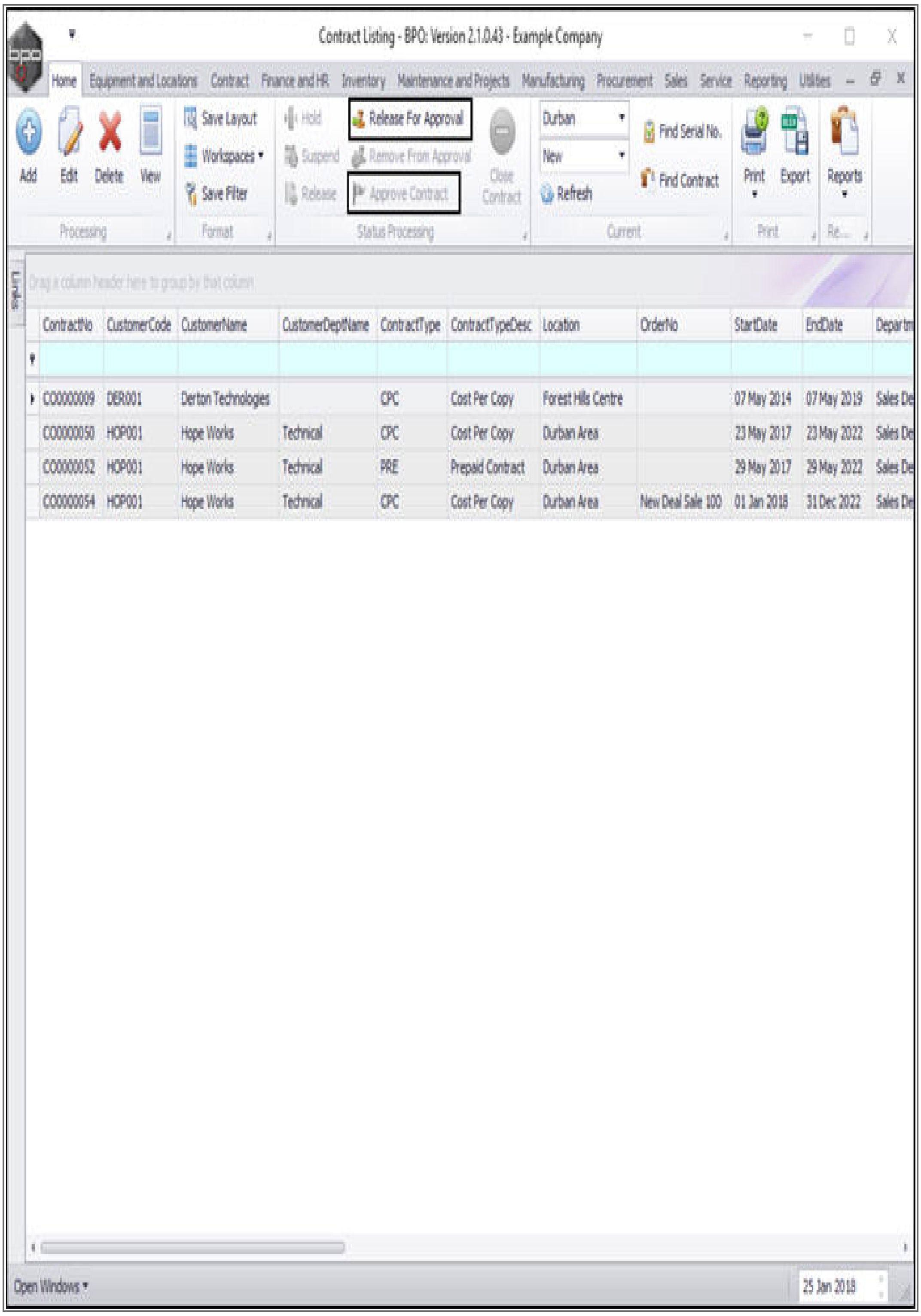

Contract Listing - BPO: Version 2.1.0.43 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Add
Edit
Delete
View
Processing
Save Layout
Workspaces
Save Filter
Format
Hold
Suspend
Release
Release For Approval
Remove From Approval
Approve Contract
Status Processing
Close Contract
Durban
Active
Find Serial No.
Print
Export
Reports
Status
StatusDesc
N New
R Released
A Active
H Hold
X Deleted
C Closed
P Suspend
Drag a column header here to group by that column
ContractNo
CustomerCode
CustomerName
CustomerDeptName
ContractType
StartDate
EndDate
C0000006 OFF001 Office Supplies Unlimited CPC Cost Per Co 22 Apr 2014 22 Apr 2019
C0000007 OFF001 Office Supplies Unlimited CPC Cost Per Copy Forest Hills Centre 07 Jan 2014 07 Jan 2019
C0000011 WES001 Westwood Dynamic CPC Cost Per Copy Main ContractOrderNo 09 May 2014 09 May 2019
C0000013 TIA001 Titan Group CPC Cost Per Copy South Riding Centre 16 May 2014 16 May 2019
C0000014 TIA001 Titan Group CPC Cost Per Copy Main 16 May 2014 16 May 2019
C0000016 TIA001 Titan Group CPC Cost Per Copy Main 13 Jun 2014 13 Jun 2019
C0000019 OFF001 Office Supplies Unlimited CPC Cost Per Copy Main 28 Jul 2014 28 Jul 2019
C0000020 HOP001 Hope Works Technical CPC Cost Per Copy Main 01 Jan 2011 31 Jan 2016
C0000028 HAC001 Hack PC - IT Shop CPC Cost Per Copy Main 29 Jun 2015 29 Jun 2020
PC000001 DAN002 Dancing Shoes PRE Prepaid Contract Kloof test 23 Mar 2016 23 Mar 2021
C0000031 YES001 Young Electric Sales Department CPC Cost Per Copy Hillcrest 24 Mar 2016 24 Mar 2021
C0000041 PAN001 Panda Copiers CPC Cost Per Copy Main 05 Jul 2016 05 Jul 2021
C0000042 HOP001 Hope Works Technical CPC Cost Per Copy Main 07 Sep 2016 07 Sep 2021
C0000043 HOP001 Hope Works Technical CPC Cost Per Copy Durban Area 01 Aug 2016 07 Sep 2021
C0000044 BOT0001 Bothas Networking inc PRE Prepaid Contract Durban Area 25 Oct 2016 25 Oct 2021
C0000045 HOP001 Hope Works Technical CPC Cost Per Copy Durban Area 1234 10 May 2017 10 May 2022
C0000047 HOP001 Hope Works Technical CPC Cost Per Copy Kloof 16 May 2017 16 May 2022
Open Windows
25 Jan 2018

- The new contract can be found within the ***New*** contract status listing screen.



RELEASE AND APPROVE A CONTRACT

- From here the contract will need to be Released and then Approved before it becomes active.



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