

# CONTRACT

## CONTRACTS - NOTES

Notes can be viewed and added to a contract from the following screens:

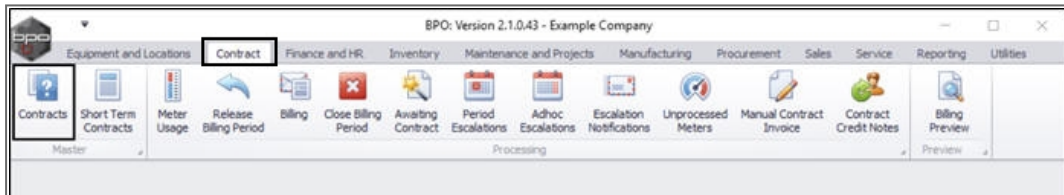
- **Contract Listing**
- **Add New Contract**
- **Contract Maintain**

These Notes cannot be deleted or edited.

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**Ribbon Access:** *Contract* > *Contracts*

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The ***Contract Listing*** screen will display.

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

ContractNo	CustomerCode	CustomerName	CustomerDeptName	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited	CPC	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited	CPC		07 Jan 2014
CO000011	WES001	Westwood Dynamic	CPC	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group	CPC		16 May 2014
CO000014	TIA001	Titan Group	CPC		16 May 2014
CO000016	TIA001	Titan Group	CPC		13 Jun 2014
CO000018	SAM001	Samanthas Diner	CPC		09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited	CPC		28 Jul 2014
CO000020	HOP001	Hope Works	Technical		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop	CPC		29 Jun 2015
PC000001	DAN002	Dancing Shoes	PRE	floor test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department		24 Mar 2016
CO000041	PAN001	Panda Copiers	CPC		05 Jul 2016
CO000042	HOP001	Hope Works	Technical		07 Sep 2016
CO000043	HOP001	Hope Works	Technical		01 Aug 2016
CO000044	BOT001	Bothas Networking inc	PRE	Durban Area	25 Oct 2016
CO000045	HOP001	Hope Works	Technical	Durban Area	10 May 2017
CO000047	HOP001	Hope Works	Technical	floor	16 May 2017

- By default, this screen will list all the **Active** contracts for the selected site.

- You can click on the **drop-down arrow** in the **Status** field and select an **alternative Status** if required.

The screenshot displays the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' application. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar contains various action buttons such as Add, Edit, Delete, View, Save Layout, Hold, Release For Approval, Suspend, Remove From Approval, Release, Approve Contract, and Close Contract. A 'Status' dropdown menu is open, showing options: N (New), R (Released), A (Active), H (Hold), X (Deleted), C (Closed), and P (Suspend). The main area is a table with columns: ContractNo, CustomerCode, CustomerName, CustomerDeptName, Status, StatusDesc, OrderNo, and StartDate. The table lists various contracts with their respective details.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	Status	StatusDesc	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited				1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre	07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo 09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre	16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main	16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main	13 Jun 2014
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main	09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main	28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main	29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	floor test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest	24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main	05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Aug 2016
CO000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area	25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234 10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	floor	16 May 2017

## VIEW NOTES

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- Select the **row** of the contract where you wish to **view** the notes.
- Click on the **Notes** tile.

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 | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports  
 Workspaces | Suspend | Remove From Approval | Active | Find Contract  
 Save Filter | Release | Approve Contract | Refresh

Processing | Format | Status Processing | Current | Print | Re...

Links  
Enter text to search...

Functions  
**Notes**  
 Documents  
 Hold History  
 Suspend History

Processing  
 Invoices  
 Credit Notes

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main		09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	ifloof	test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	ifloof		16 May 2017

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- The ***Contract Note Listing For Contract No.: []*** screen will open.
- Here you can **view** all the **Notes** and **Comments** that have been linked to this contract.

**Note:** You cannot edit or delete any information in the **Comments** data grid in this screen.

Contract Note Listing for Contract No. : CO0000043 - 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 | Back | Save Layout

Processing | Format

Drag a column header here to group by that column

Comment	Date
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.            The fee Modified is 5            Located on Machine : 1912-147258            The charge amount has changed from 606.38 to 636.69            Start Date : 07 Sep 2016            End Date : 07 Sep 2021            Escalation rate : 10.00            Account code : 1101            COS Account code : 2101            Invoice Description : Service            Billing Period : 7            Billing Cycle : m            Finance Party :            Finance Amount : 0.00            Billing Customer : HOP001            This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.            The fee Modified is 5            Located on Machine : 1912-147258            The charge amount has changed from 577.50 to 606.38            Start Date : 07 Sep 2016            End Date : 07 Sep 2021            Escalation rate : 10.00            Account code : 1101            COS Account code : 2101            Invoice Description : Service            Billing Period : 7            Billing Cycle : m            Finance Party :            Finance Amount : 0.00            Billing Customer : HOP001            This change was made by : Judith Mudzengi</p>	09 Mar 2017

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## ADD NOTE

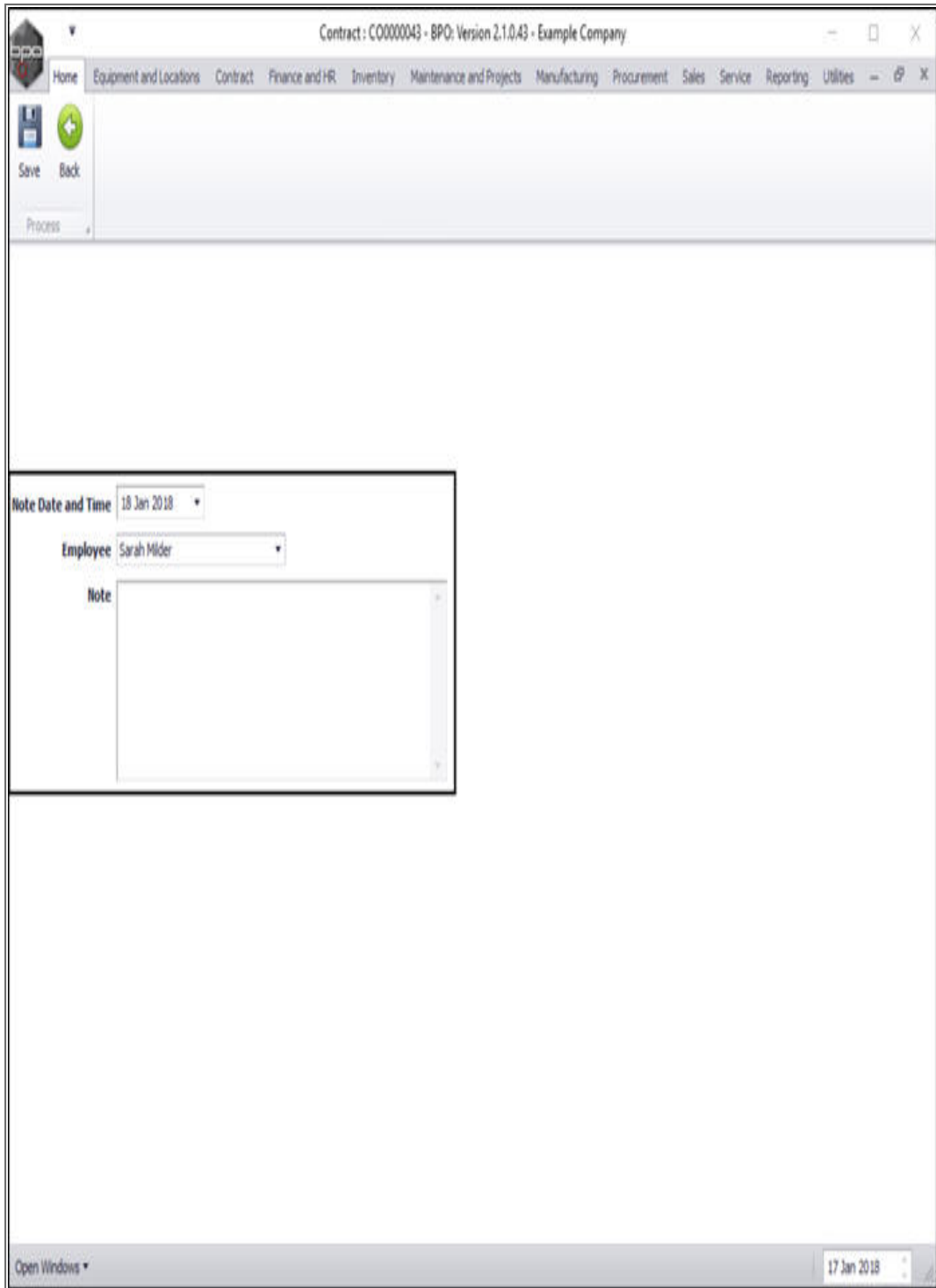
- Click on **Add**.

Comment	Date
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001.                      The fee Modified is 5                      Located on Machine : 1912-147258                      The charge amount has changed from 606.38 to 636.69                      Start Date : 07 Sep 2016                      End Date : 07 Sep 2021                      Escalation rate : 10.00                      Account code : 1101                      COS Account code : 2101                      Invoice Description : Service                      Billing Period : 7                      Billing Cycle : m                      Finance Party :                      Finance Amount : 0.00                      Billing Customer : HCP001                      This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001.                      The fee Modified is 5                      Located on Machine : 1912-147258                      The charge amount has changed from 577.50 to 606.38                      Start Date : 07 Sep 2016                      End Date : 07 Sep 2021                      Escalation rate : 10.00                      Account code : 1101                      COS Account code : 2101                      Invoice Description : Service                      Billing Period : 7                      Billing Cycle : m                      Finance Party :                      Finance Amount : 0.00                      Billing Customer : HCP001                      This change was made by : Judith Mudzengi</p>	09 Mar 2017



The **Contract: []** screen will open. You can view the following details:

- **Note Date and Time:** This will auto populate with the current date.
  - You can either type in, or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Employee:** This will auto populate with the person currently logged on to the system.
  - You can click on the drop-down arrow and select an alternative person, if required.
- **Note:** Type in details relevant to this contract.



Contract: CO0000043 - 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

Process

Note Date and Time 18 Jan 2018

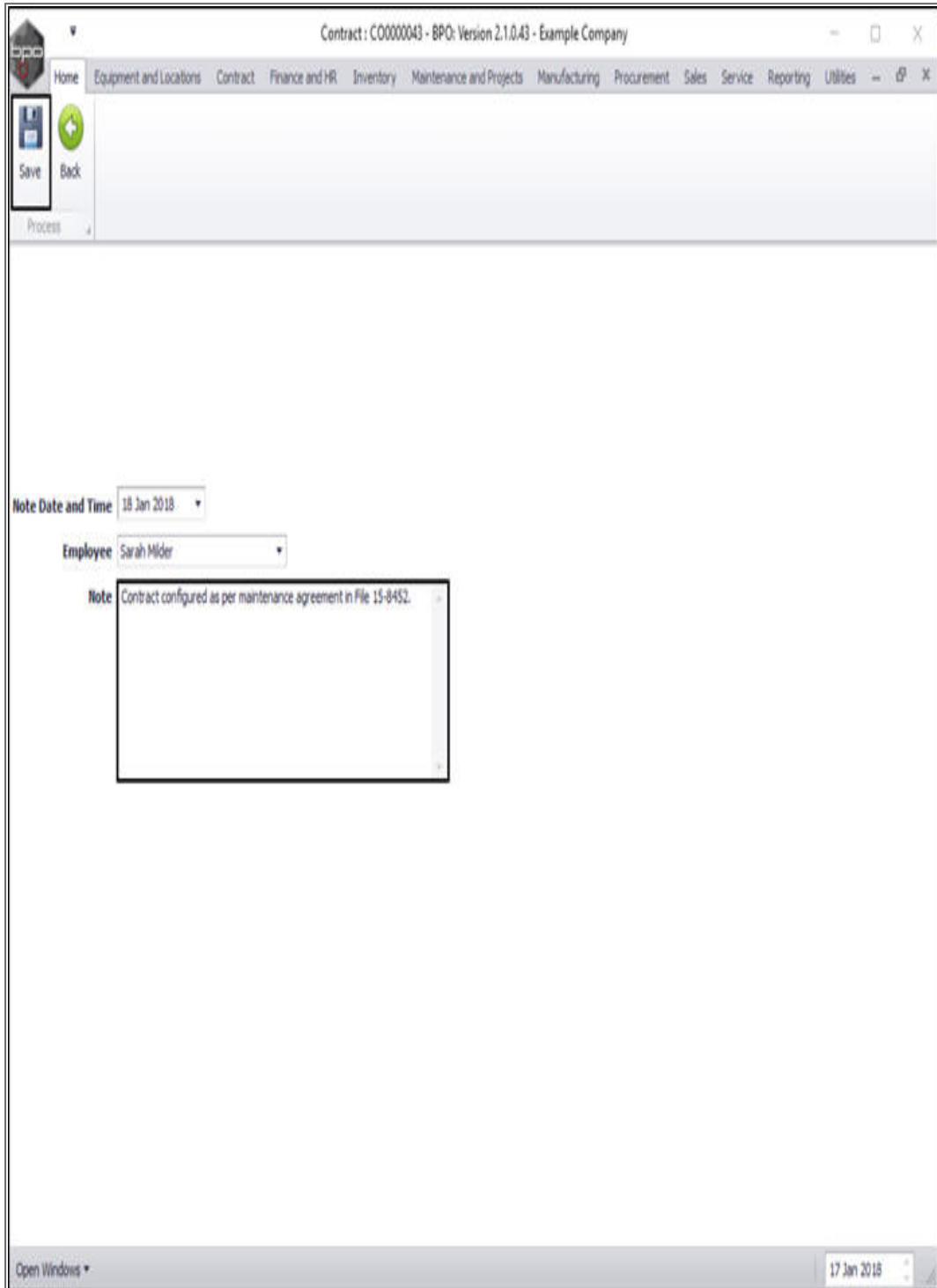
Employee Sarah Milder

Note

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## SAVE NOTE

- When you have finished adding your note, click on **Save**.



- You will return to the ***Contract Note Listing for Contract No.:*** screen.
- A ***Contract Processing*** message box will pop up advising the following:
  - *Note has been added to Contract No: []*.
- Click on ***OK***.

Contract Note Listing for Contract No. : CO0000043 - 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 | Back | Save Layout

Processing | Format

Drag a column header here to group by that column

Comment	Date
Contract configured as per maintenance agreement in File 15-0452.	18 Jan 2018
A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 606.38 to 636.69 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HOP001 This change was made by : Judith Mudzengi	09 Mar 2017
A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 577.50 to 606.38 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HOP001 This change was made by : Judith Mudzengi	09 Mar 2017

Contract Processing

Note has been added to Contract No : CO0000043.

OK

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## VIEW ADDED NOTE

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- You can now view the newly added note.
- Click on **Back** to return to the **Contract Listing** screen.

Contract Note Listing for Contract No. : CO0000043 - 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 | Back | Save Layout

Processing | Format

Drag a column header here to group by that column

Comment	Date
Contract configured as per maintenance agreement in File 15-8452.	18 Jan 2018
A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 606.38 to 636.69 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HCP001 This change was made by : Judith Mudzengi	09 Mar 2017
A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 577.50 to 606.38 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HCP001 This change was made by : Judith Mudzengi	09 Mar 2017

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