

CONTRACT

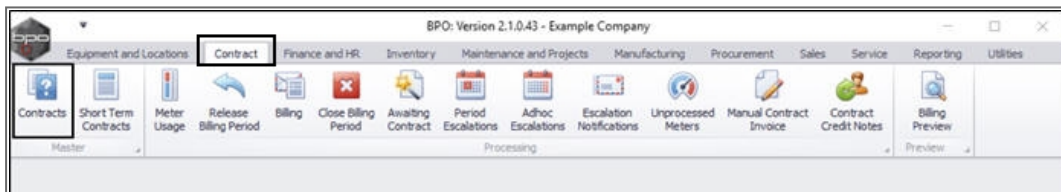
CONTRACTS - DOCUMENTS

It may be necessary to link digital documents to a contract which can then be viewed by all parties with the required security rights.

These documents should be saved in a shared folder on the server (which can be secured with permissions, where required), otherwise the document(s) will not open.

Follow the process to **view**, **add**, or **delete** documents for a contract.

Ribbon Access: *Contract > Contracts*



The **Contract Listing** screen will display.

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

ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	Department
CO0000012	CPC	South Ridi...	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Depart
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Depart
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Depart
CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Depart
CO0000020	CPC	Durban Area	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Depart
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Depart
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Depart
CO0000038	CPC	Durban Area	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Depart
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Depart
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Depart
CO0000044	CPC	Durban Area	BOT0001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Depart
CO0000050	CPC	Durban Area	HOP001	Hope Works	Cost Per Copy		23 May 2017	23 May 2022	Sales Depart
CO0000061	CPC	BPO_RSI	TIA001	Titan Group	Cost Per Copy		23 Nov 2018	23 Nov 2023	Sales Depart
CO0000062	CPC	Durban Area	HOP001	Hope Works	Cost Per Copy	20	14 Dec 2018	14 Dec 2023	Sales Depart

This screen defaults to the **Active** status.

- Select a different **status** from the drop-down, menu if required.

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 Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract

Processing Format Status Processing

Durban Active Find Serial No. Print Export Reports

Status StatusDesc
 N New
 R Released
 A Active
 H Hold
 X Deleted
 C Closed
 P Suspend

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	StarDate	EndDate	DepartmentName
CO000006	OFF001	Office Supplies Unl...		CPC	Cost Per Copy	02 Apr 2014	22 Apr 2019	Sales Departme
CO000007	OFF001	Office Supplies Unl...		CPC	Cost Per Copy Forest Hills Centre	07 Jan 2014	07 Jan 2019	Sales Departme
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy Main ContractOrderNo	09 May 2014	09 May 2019	Sales Departme
CO000013	TIA001	Titan Group		CPC	Cost Per Copy South Riding Centre	16 May 2014	16 May 2019	Sales Departme
CO000014	TIA001	Titan Group		CPC	Cost Per Copy Main	16 May 2014	16 May 2019	Sales Departme
CO000016	TIA001	Titan Group		CPC	Cost Per Copy Main	13 Jun 2014	13 Jun 2019	Sales Departme
CO000019	OFF001	Office Supplies Unl...		CPC	Cost Per Copy Main	28 Jul 2014	28 Jul 2019	Sales Departme
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy Main	01 Jan 2011	31 Jan 2016	Sales Departme
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy Main	29 Jun 2015	29 Jun 2020	Sales Departme
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract Kloof test	23 Mar 2016	23 Mar 2021	Sales Departme
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy Hillcrest	24 Mar 2016	24 Mar 2021	Sales Departme
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy Main	05 Jul 2016	05 Jul 2021	Sales Departme
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy Main	07 Sep 2016	07 Sep 2021	Technical
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy Durban Area	01 Aug 2016	07 Sep 2021	Sales Departme
CO000044	BOT001	Bothas Networking...		PRE	Prepaid Contract Durban Area	25 Oct 2016	25 Oct 2021	Technical
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy Durban Area 1234	10 May 2017	10 May 2022	Sales Departme
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy Kloof	16 May 2017	16 May 2022	Technical

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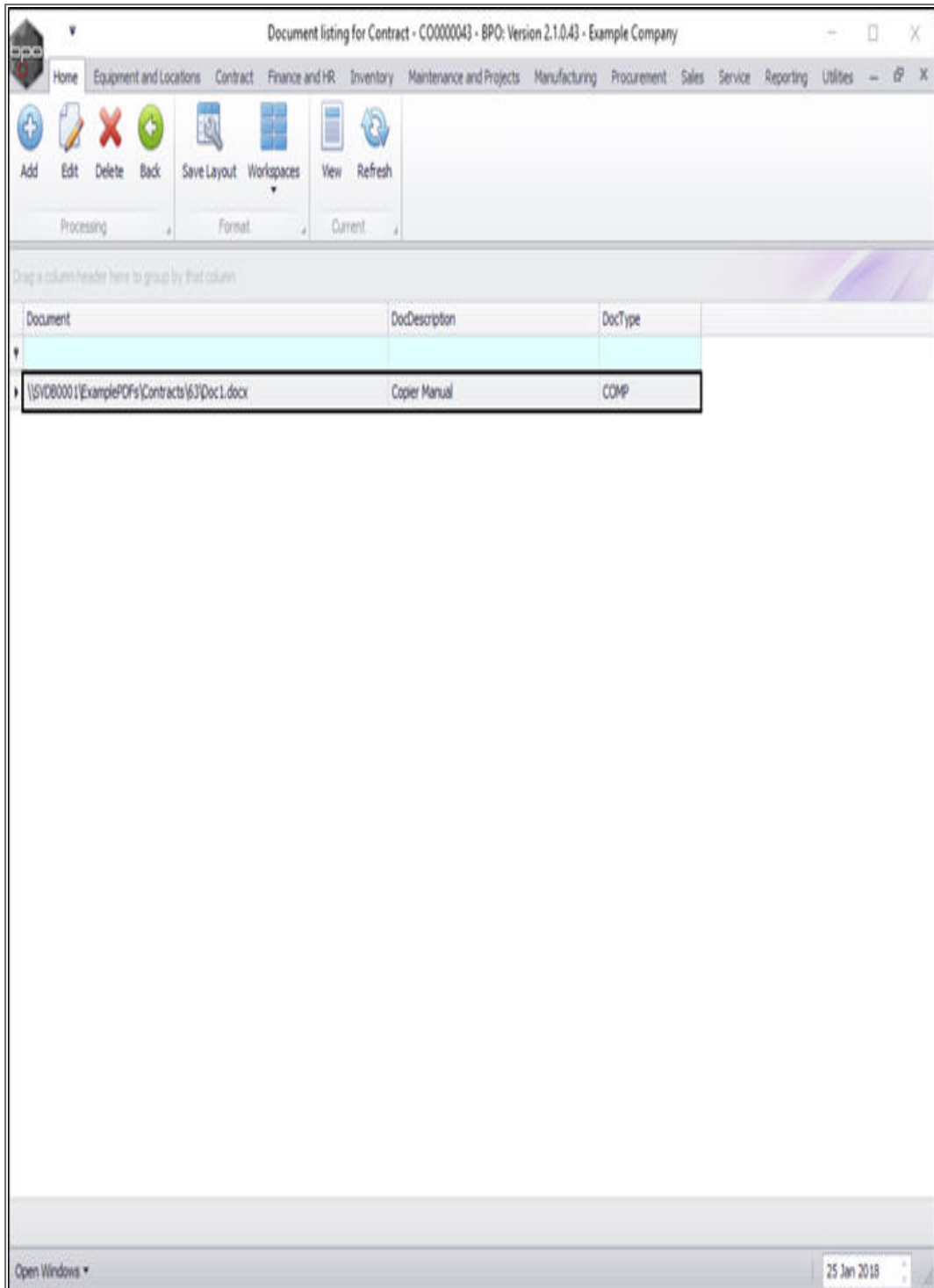
VIEW DOCUMENTS

- Select the **row** of the contract where you wish to **view** the linked documents.
- Click on the **Documents** tile.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	En
CO000006	OFF001	Office Supplies Unl...		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014	22
CO000007	OFF001	Office Supplies Unl...		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014	07
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014	09
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014	16
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13
CO000019	OFF001	Office Supplies Unl...		CPC	Cost Per Copy	Main		28 Jul 2014	28
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Koof	test	23 Mar 2016	23
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016	24
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07
CO000044	BOT001	Bothas Networking...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Koof		16 May 2017	16

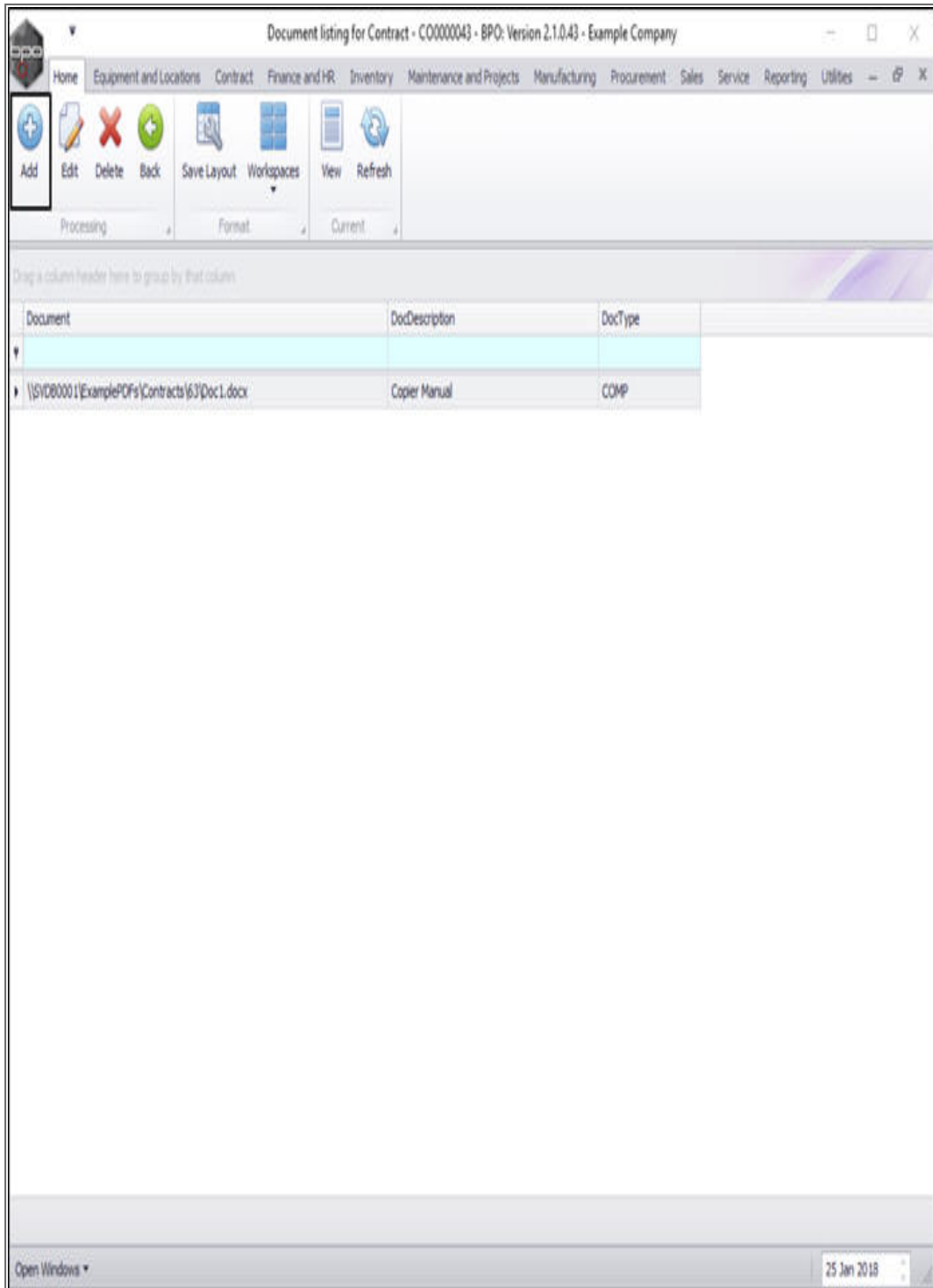
The **Document listing for Contract - []** screen will open.

- Here you can **view** a list of the digital documents currently linked to this contract.



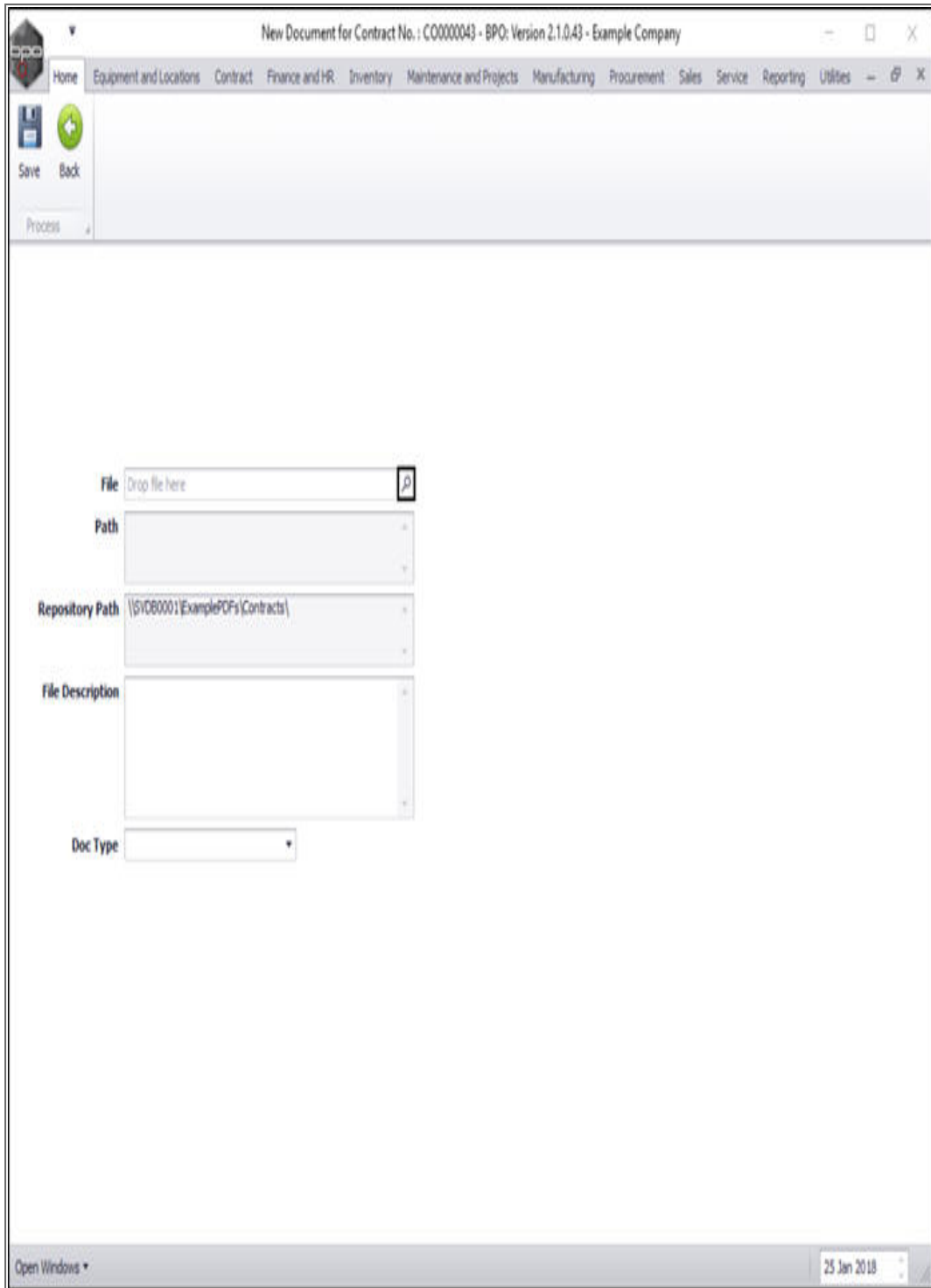
ADD DOCUMENT

- In the *Document Listing for Contract - []* screen, click on **Add**.



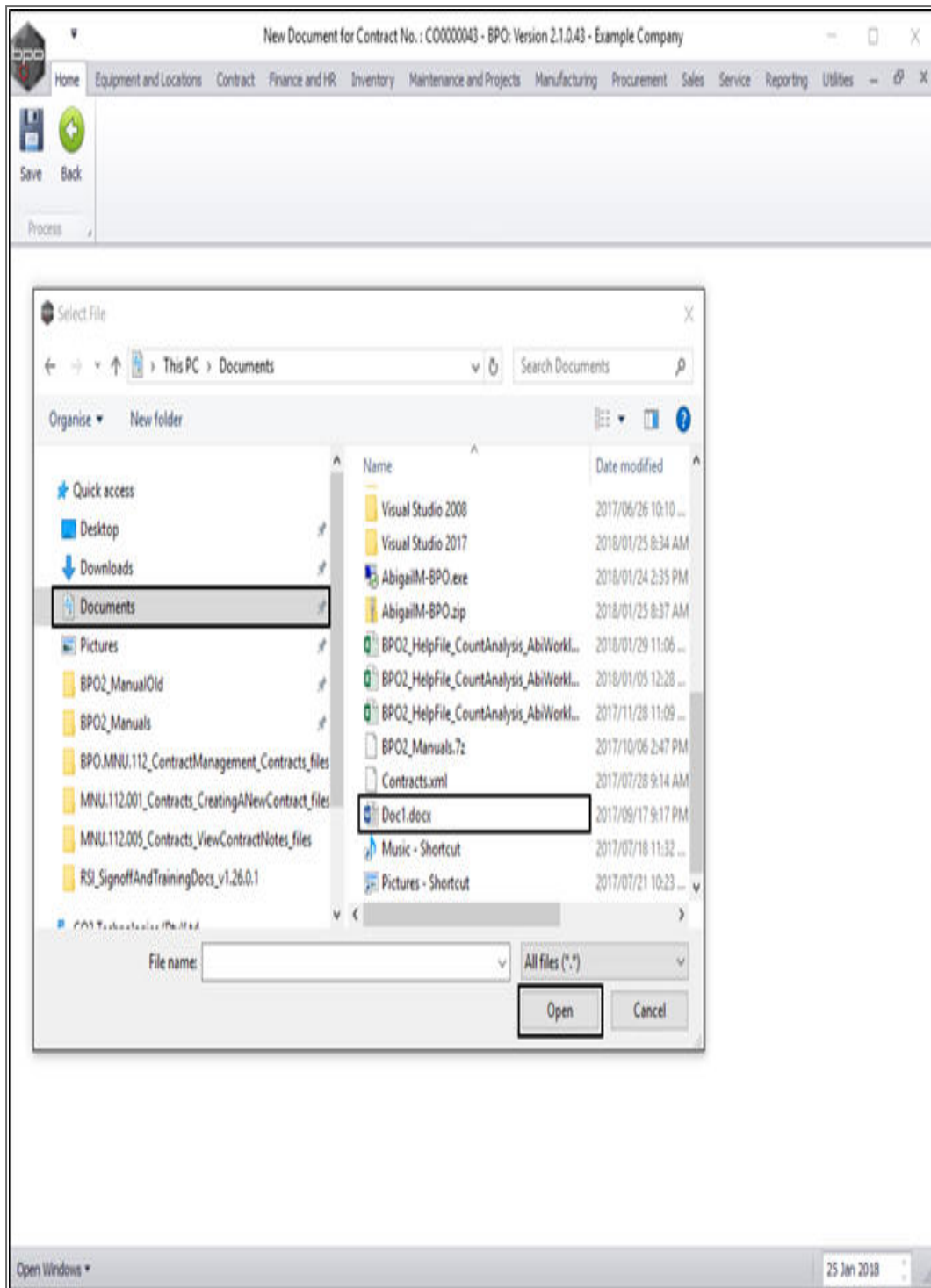
The ***New Document for Contract No. :[]*** screen will open.

- **File:** Click on the **search** button in the file field.

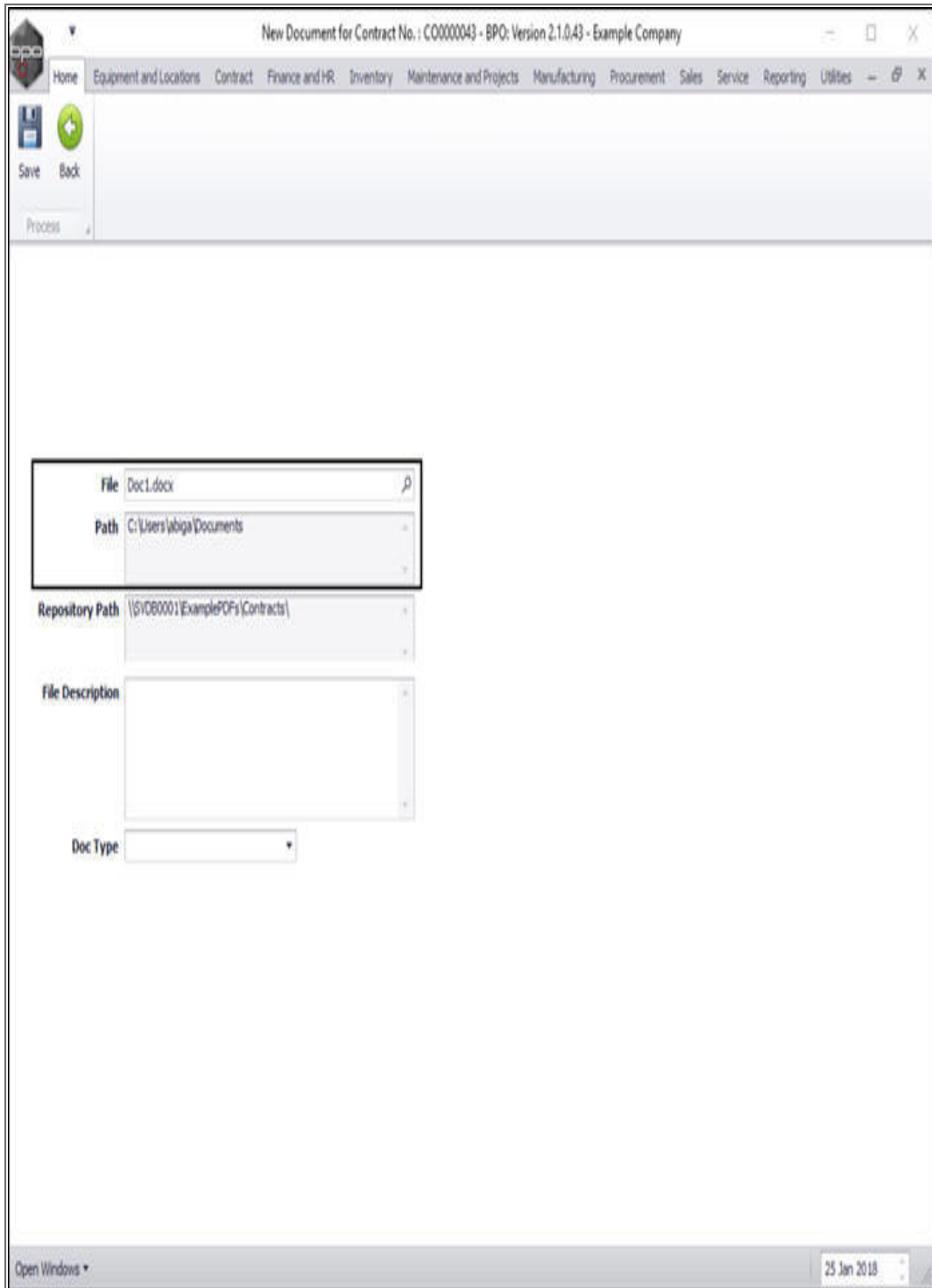


- The **Select File** screen will pop up.
- Find the document in the **shared folder** on the server.

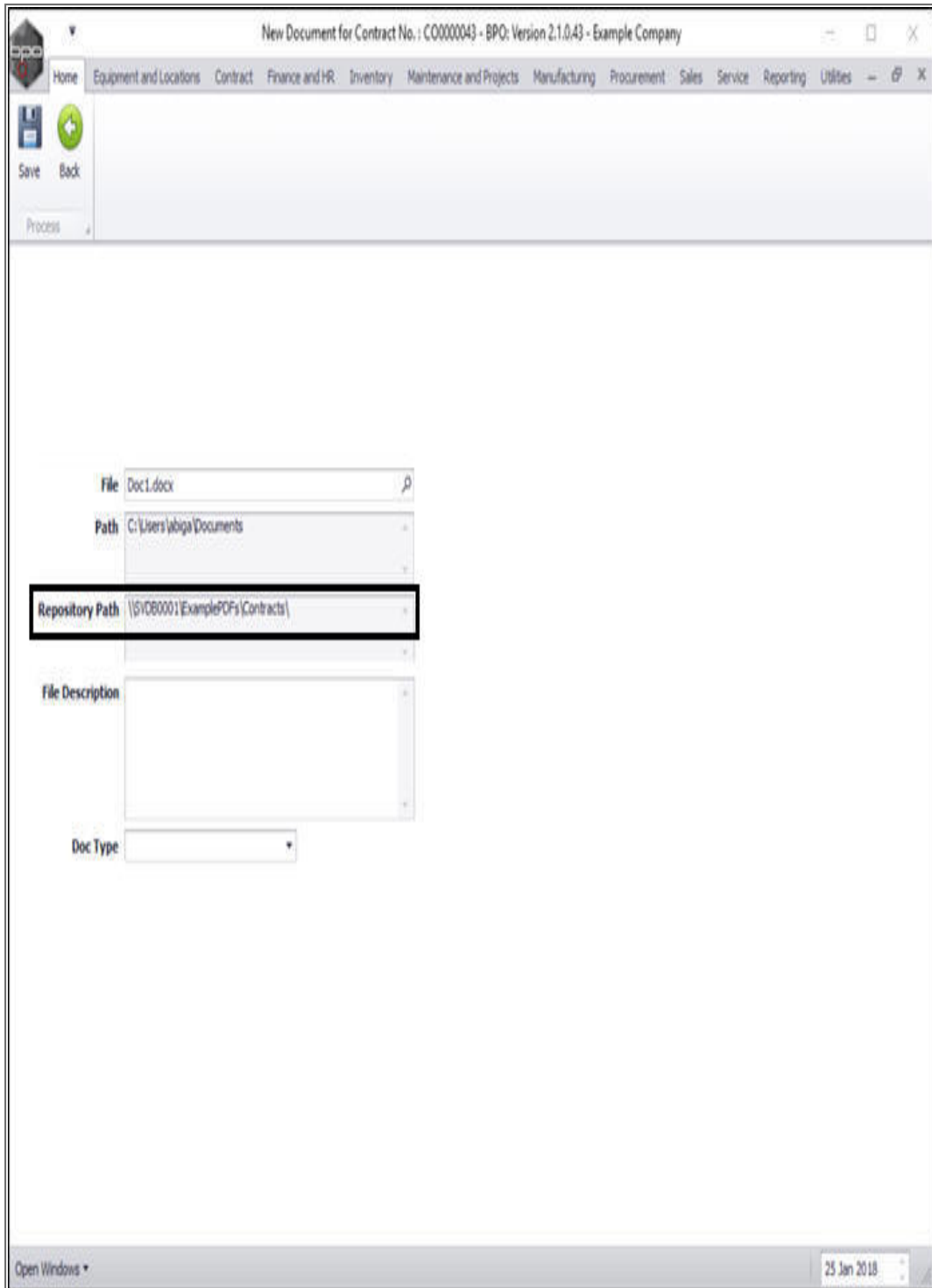
- Click on **Open**.



- The **File** and **Path** fields will now populate with the selected file details.



- The **Repository Path** is auto populated according to the path that has been set up in the **company configuration**.



- **File Description:** Type in a description for the document.

New Document 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

Save Back

Process

File: Doc1.docx

Path: C:\Users\jbiga\Documents

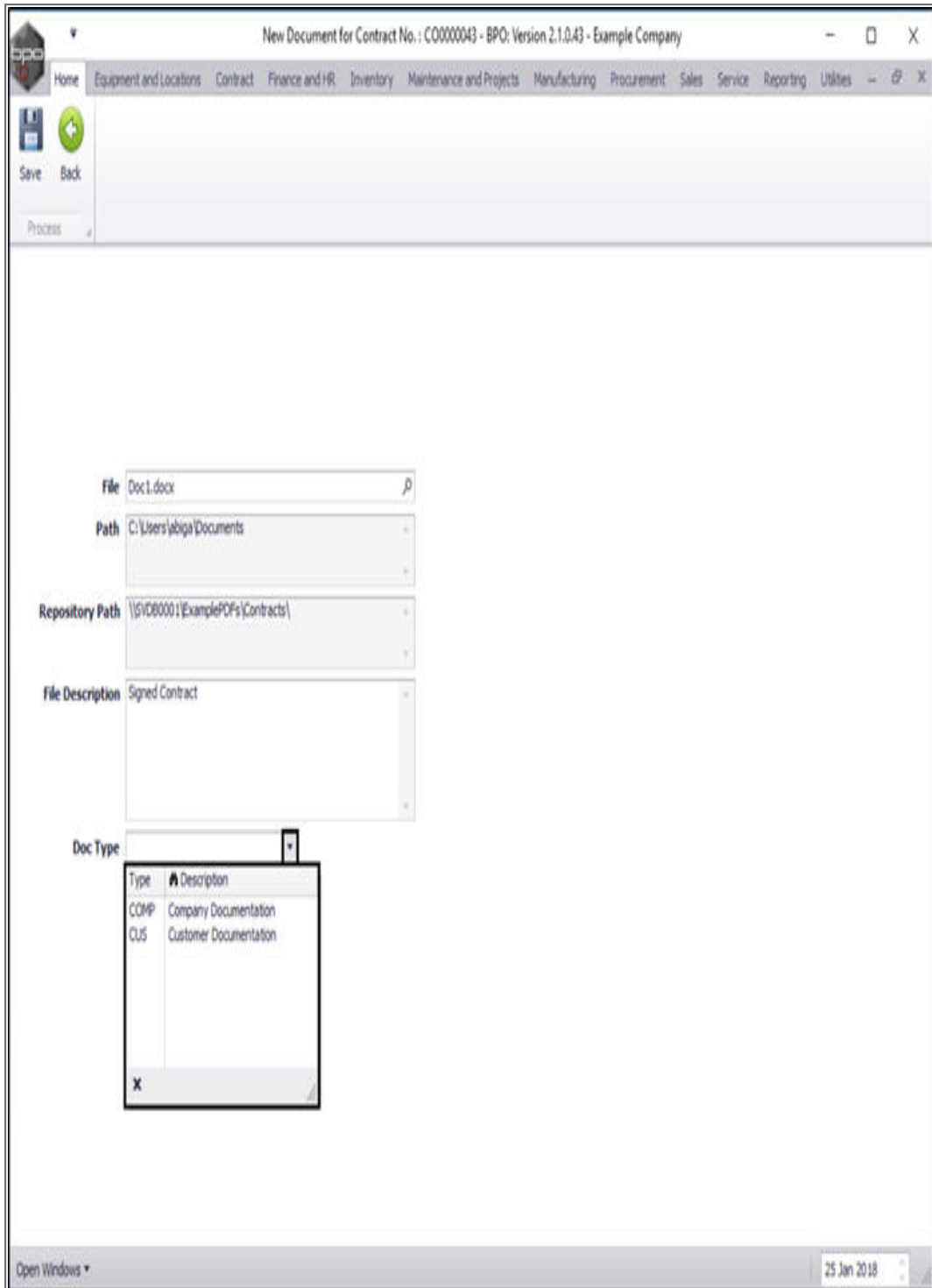
Repository Path: \\SIV080001\ExamplePDFs\Contracts

File Description: Signed Contract

Doc Type: [Dropdown]

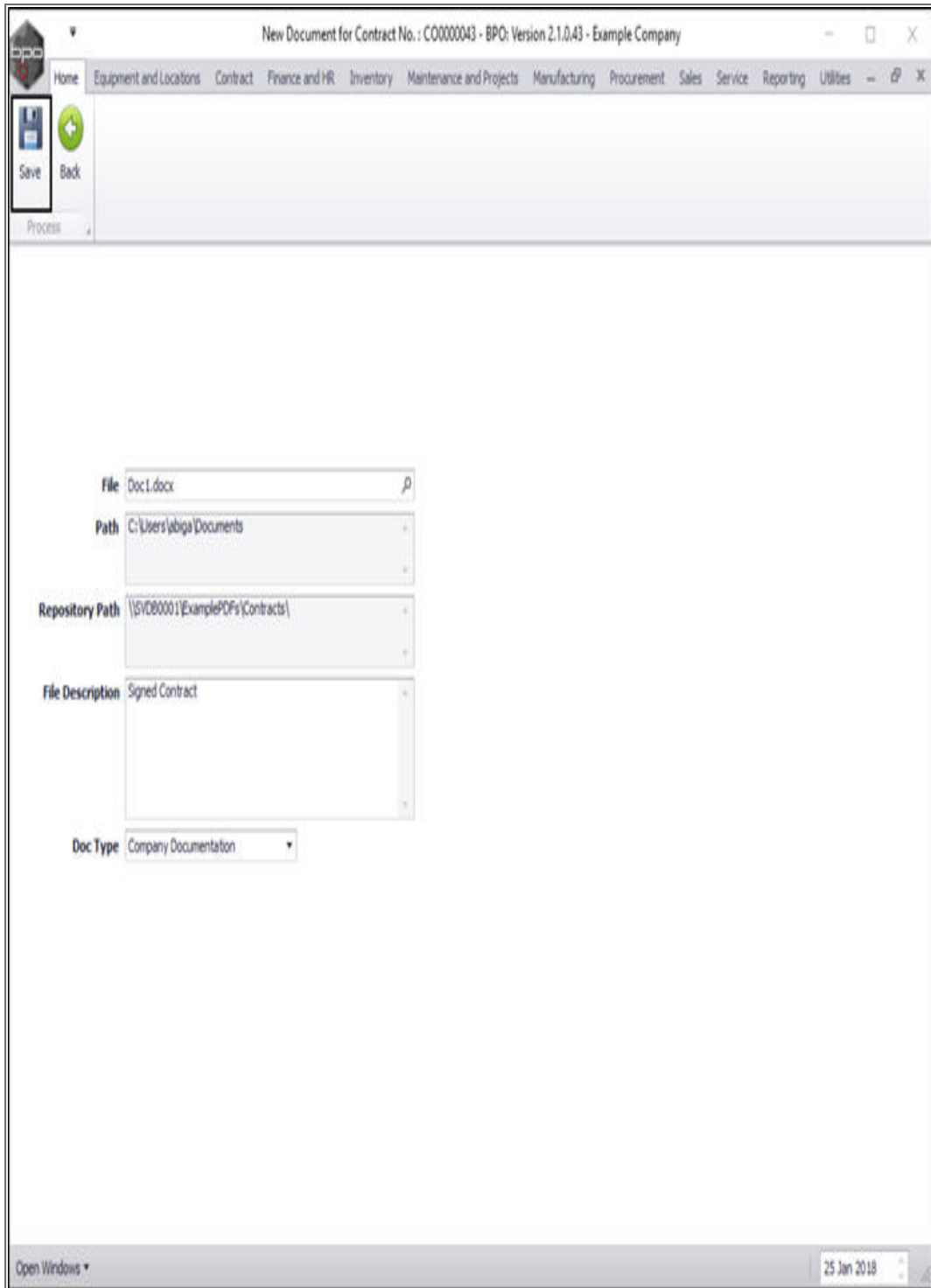
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- **Type:** Click on the drop-down arrow and select the document type from the menu.



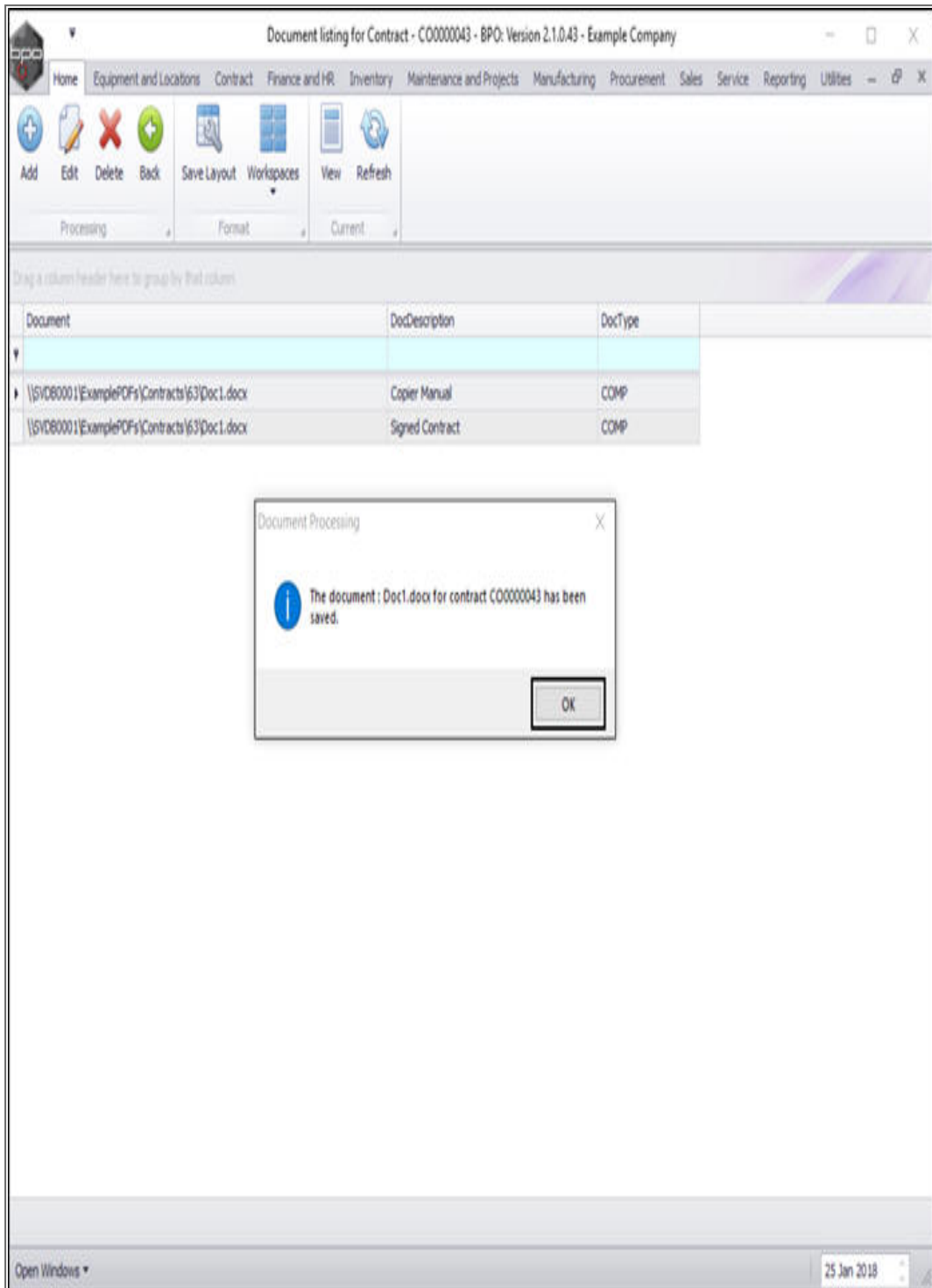
SAVE DOCUMENT

- When you have finished adding the details to this screen, click on **Save**.



- A **Document Processing** message box will pop up advising the following:

- *This document: [] for contract [] has been saved.*
- Click on **OK**.



VIEW ADDED DOCUMENT

- You can now see the selected document has been added to the *Document listing for Contract - []* screen.

Document listing for Contract - CO000043 - 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 Back Save Layout Workspaces View Refresh

Processing Format Current

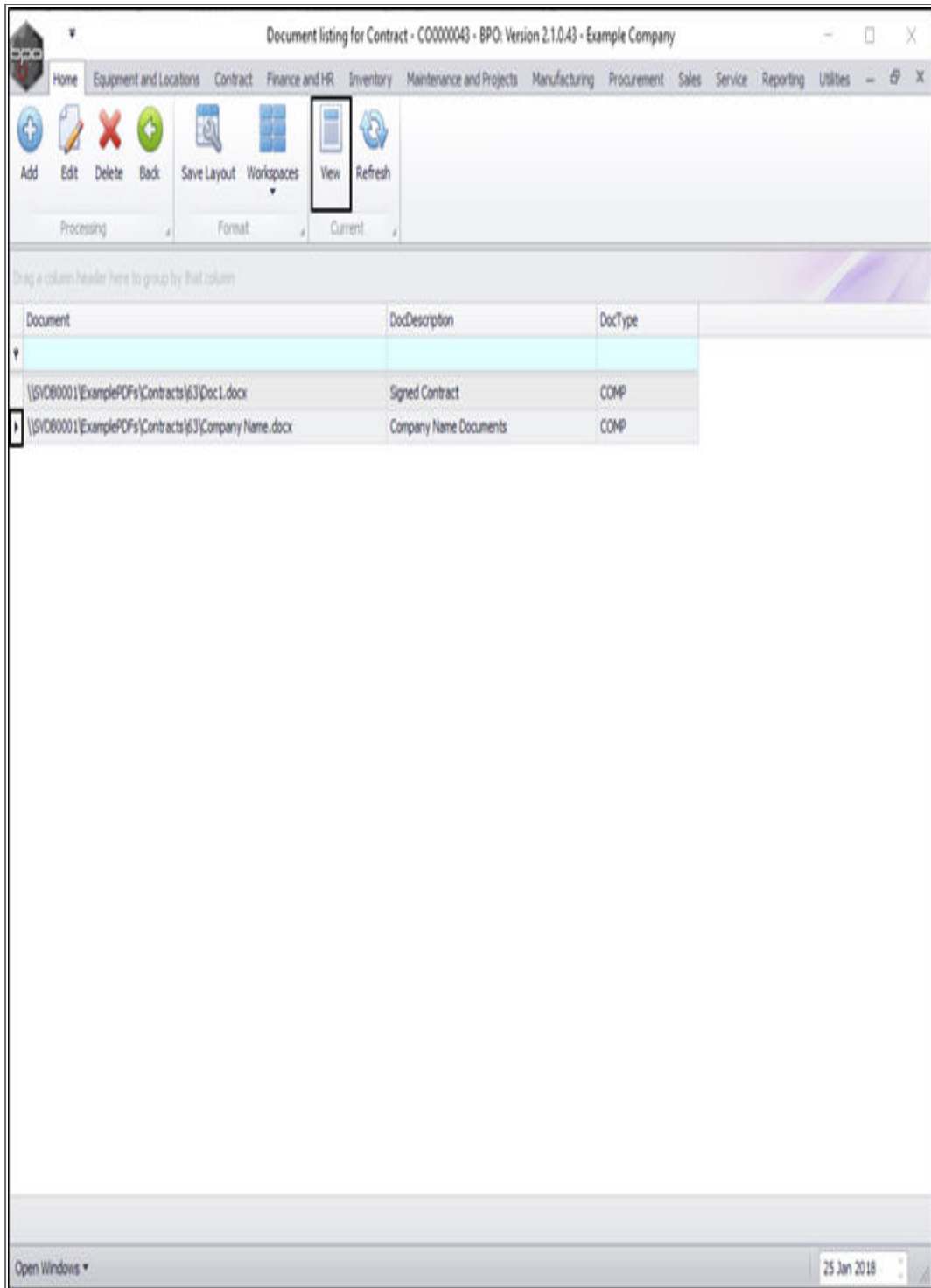
Drag a column header here to group by that column

Document	DocDescription	DocType
\\SVD80001\ExamplePDFs\Contracts\63\Doc1.docx	Copier Manual	COMP
\\SVD80001\ExamplePDFs\Contracts\63\Doc1.docx	Signed Contract	COMP

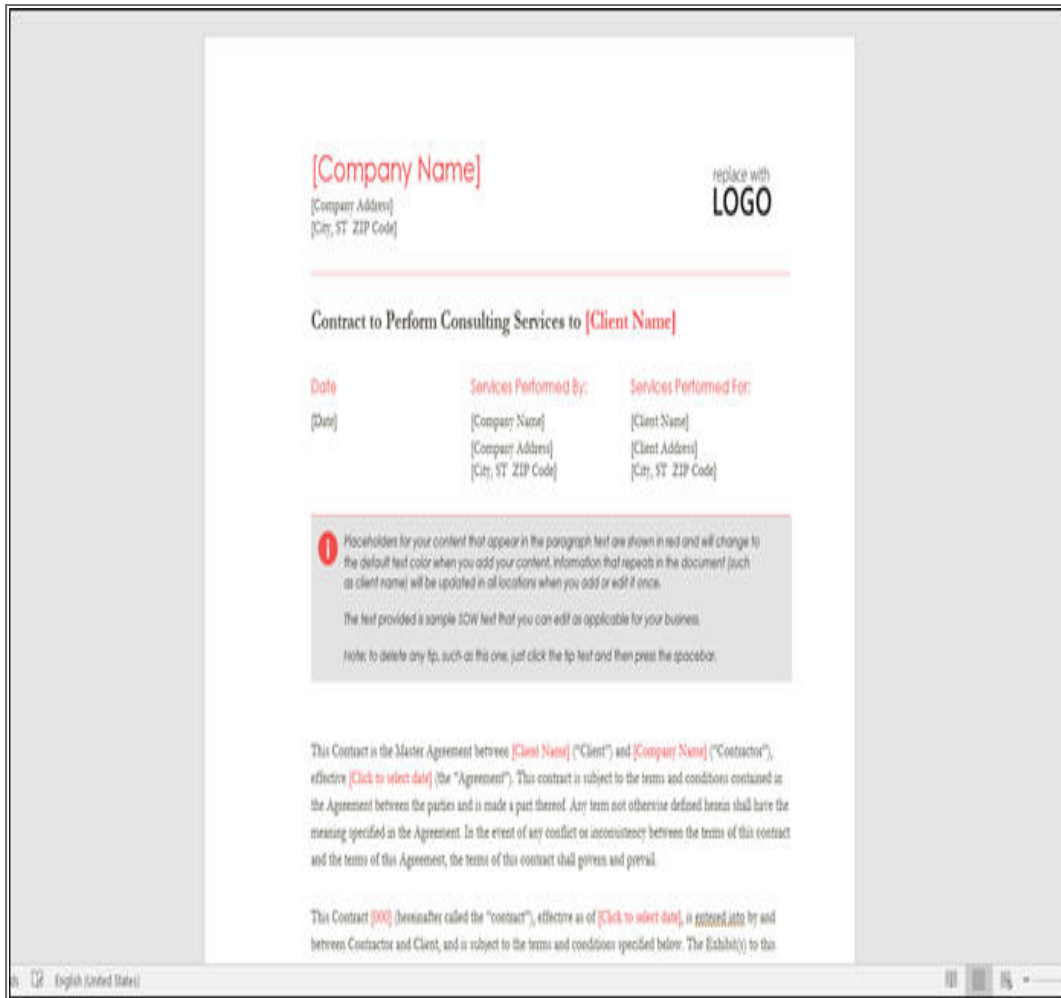
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OPEN DOCUMENT

- To **open** and **view** any digital document in the Document listing screen, select the **row** of the document you wish to open.
- Click on **View**.



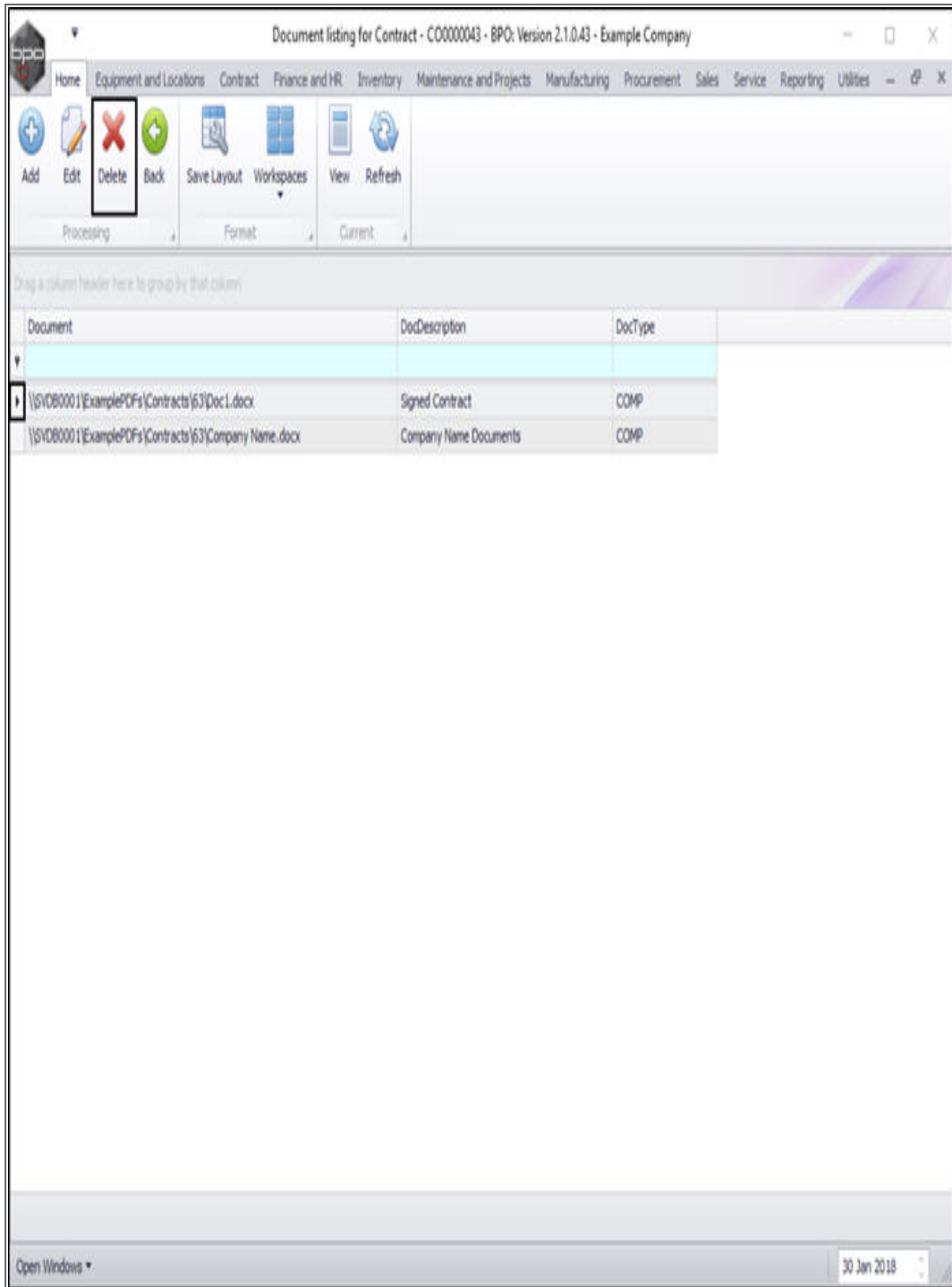
- The selected document will open in your screen.
- **Close** the document screen when you have finished viewing it.



You will return to the **Document listing for Contract - []** screen.

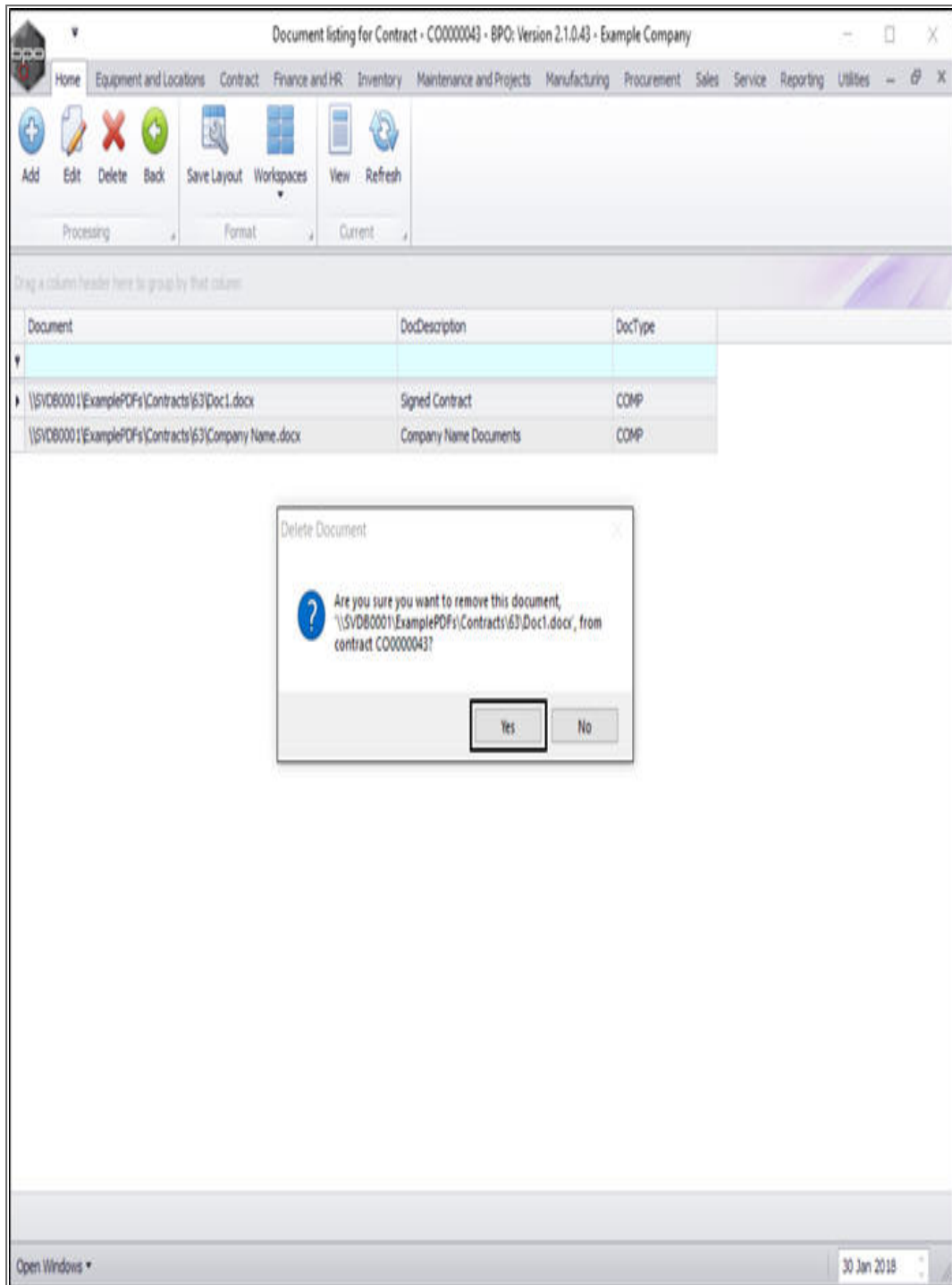
DELETE DOCUMENT

- In the **Document Listing for Contact - []** screen, select the **row** of the document you wish to remove from the list.
- Click on **Delete**.

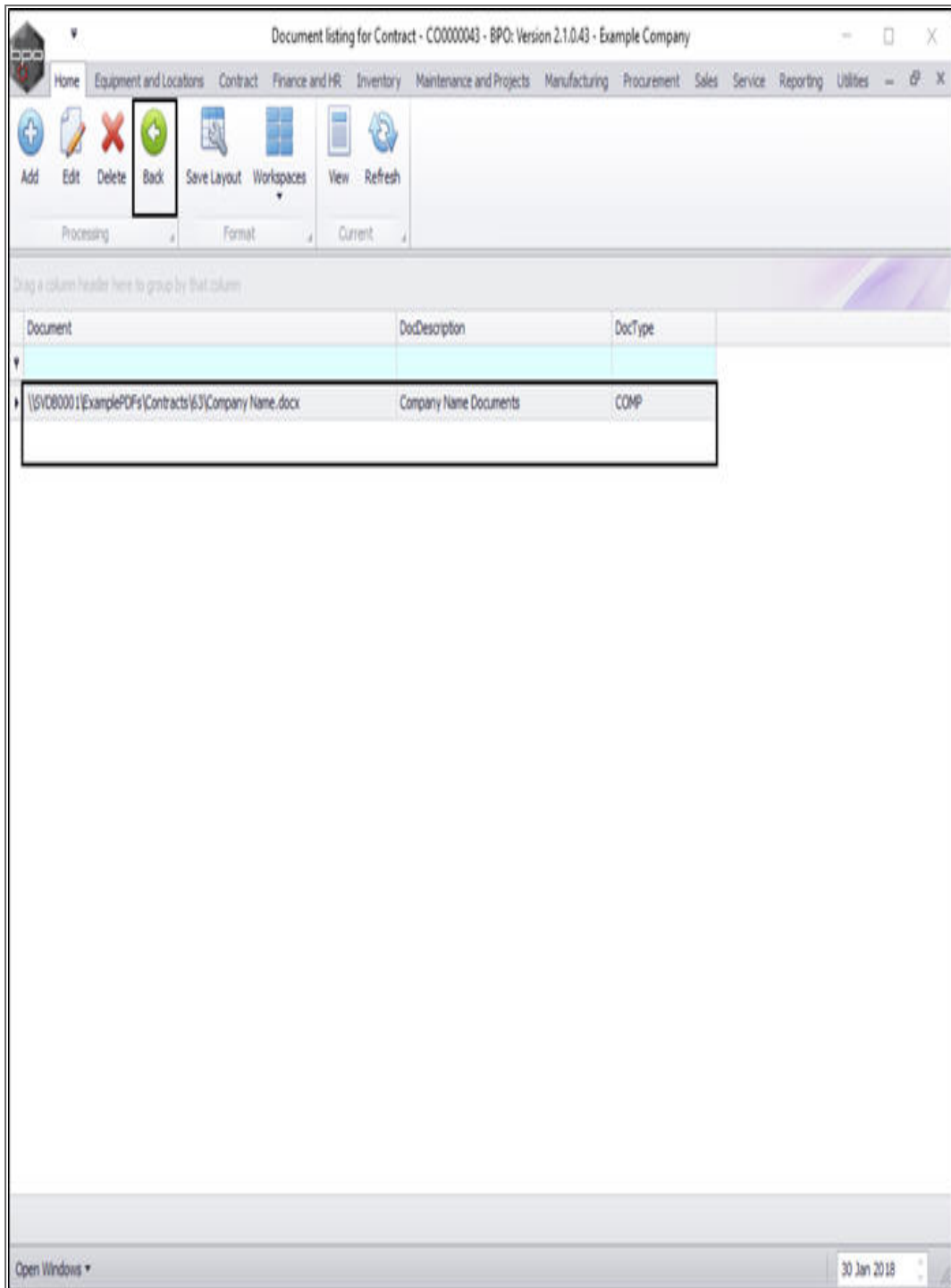


- A **Delete Document** message box will pop up with the following prompt:

- Are you sure you want to remove this document [] from contract []?
- Click on **Yes**.



- The selected document will be removed from this screen.
- Click on **Back** to return to the **Contract Listing** screen.



MNU.112.006

