

CONTRACT

CONTRACTS - EDIT

Contracts give you the ability to effectively manage your customer billing.

Contracts can only be edited when in the **New** or **Active** states.

If certain amendments are done on an Active contract, it will move back to **Released** state, to be checked and *re-approved*.

An email will be sent to all users who have the rights to authorise (i.e. [Release](#) and [Approve](#)) a contract.

The types of changes that would trigger the contract to be placed back into the **Released** state include:

- Change Contract Type
- Change Customer
- Aggregate Billing flag
- If any contract item is added
- If any contract item is removed
- If any contract item fee is added
- If any contract item fee is removed
- Change of Billing Customer on a fee
- Change of Billing Customer on a meter

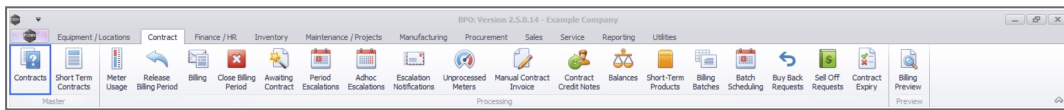
And if the following types of changes are made to the Contract Item Fees:

- Amount
- Start Date
- End Date
- Escalation %
- Account Code

- COS Account Code
- Invoice Description
- Billing Period
- Billing Cycle
- Finance Party
- Finance Amount

Note: As you can only edit a contract in the *Active* or *New* status - the contract you wish to edit will either be in this state or the New State.

Ribbon Select *Contract* > *Contracts*



The *Contract Listing* screen will be displayed.

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

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

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractTy	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bill
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months	Months	3	
CO000016	TI001	Titan Group		CPC	Cost Per Co.	Man		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	Months	4	
CO000018	SAN001	Sanambas Diner		CPC	Cost Per Co.	Man		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	Months	5	
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Man		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual	Months	6	
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con.	Kloof test		23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hlorest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Man		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months	Months	5	
CO000042	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Man		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months	Months	7	
CO000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Man		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	Months	5	
CO000052	HCP001	Hope Works (Pty) Ltd		PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months	Months	3	
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months	Months	0	
CO000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	Months	2	
CO000073	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	Months	Months	0	
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	Months	6	
CO000077	PIK001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000078	PIK001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months	Months	2	
CO000082	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months	Months	7	
CO000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months	Months	8	

SELECT THE CONTRACT

- Select the **row** of the **contract** that you wish to process.

- Click on the **Edit** button.

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



EDIT CONTRACT DETAILS

- The **Maintenance for Contract No. : [] - Status: []** screen will open.
- Edit the details, as required.
- Expand the **Information tabs** on the left-hand side of the screen, if those frames contain details that need to be changed.
- Expand the **Items data grids**, if there are details there, which need to be changed.

SAVE CHANGES

SAVE THE CONTRACT

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

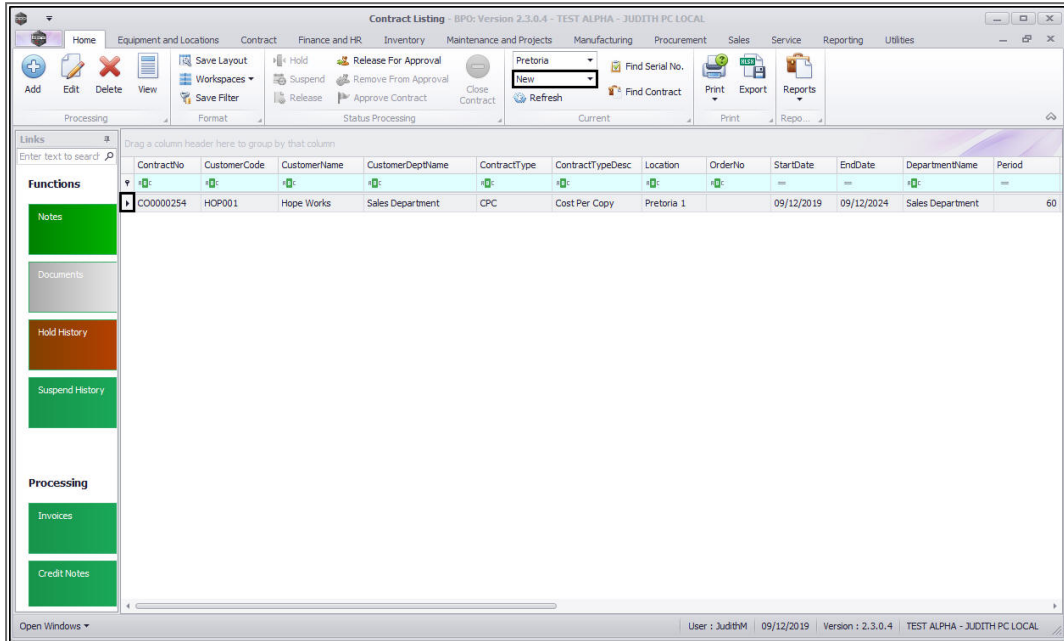


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **New** contracts can be found within the **New** contract status listing screen.
- From here, the contract will need to be **Released** and then **Approved** before it becomes active.

- **Edited** contracts may either remain in **Active** status or move to **Released** status in order for changes to be reviewed before **Approval** depending on the change made.



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