

# CONTRACT

## RELEASE FROM HOLD

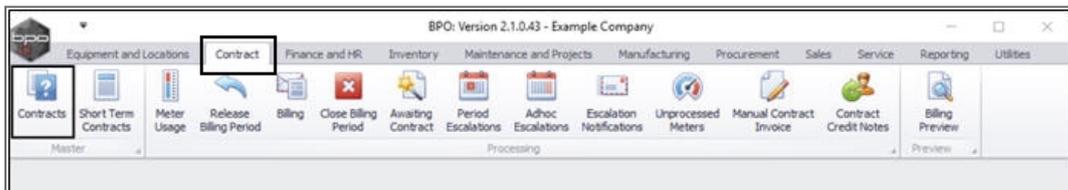
When a contract is placed on **Hold**, the system will prevent call logging, but the customer will still be included in the month end billing.

When the Hold reason has been **resolved**, e.g., payment has been made, then the contract will need to be **released** from Hold and put back into the **Active** status.

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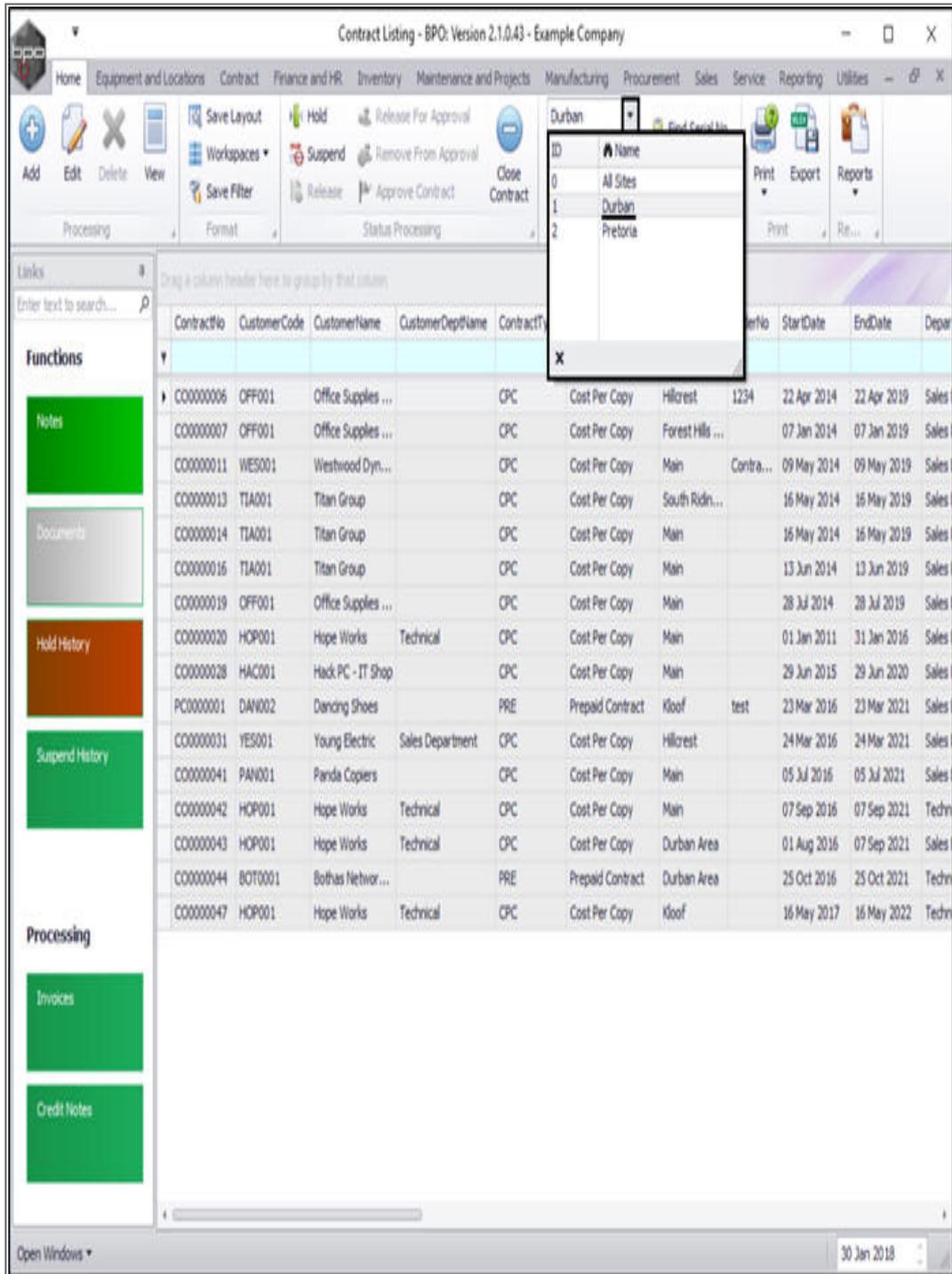
**Ribbon Access:** *Contract > Contracts*

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

- Select the **Site**.
  - In this example, **Durban** has been selected.



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

- Click on the drop-down **arrow** in the **status** field and select the **Hold** status.

The screenshot shows the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' application. The interface includes a ribbon menu with tabs like 'Home', 'Equipment and Locations', 'Contract', 'Finance and HR', etc. A dropdown menu is open over the 'Status' column of a table, showing options: 'New', 'Released', 'Active', 'Hold', 'Deleted', 'Closed', and 'Suspend'. The 'Hold' option is highlighted. The table below contains contract data with columns for ContractNo, CustomerCode, CustomerName, CustomerDeptName, ContractType, and various dates.

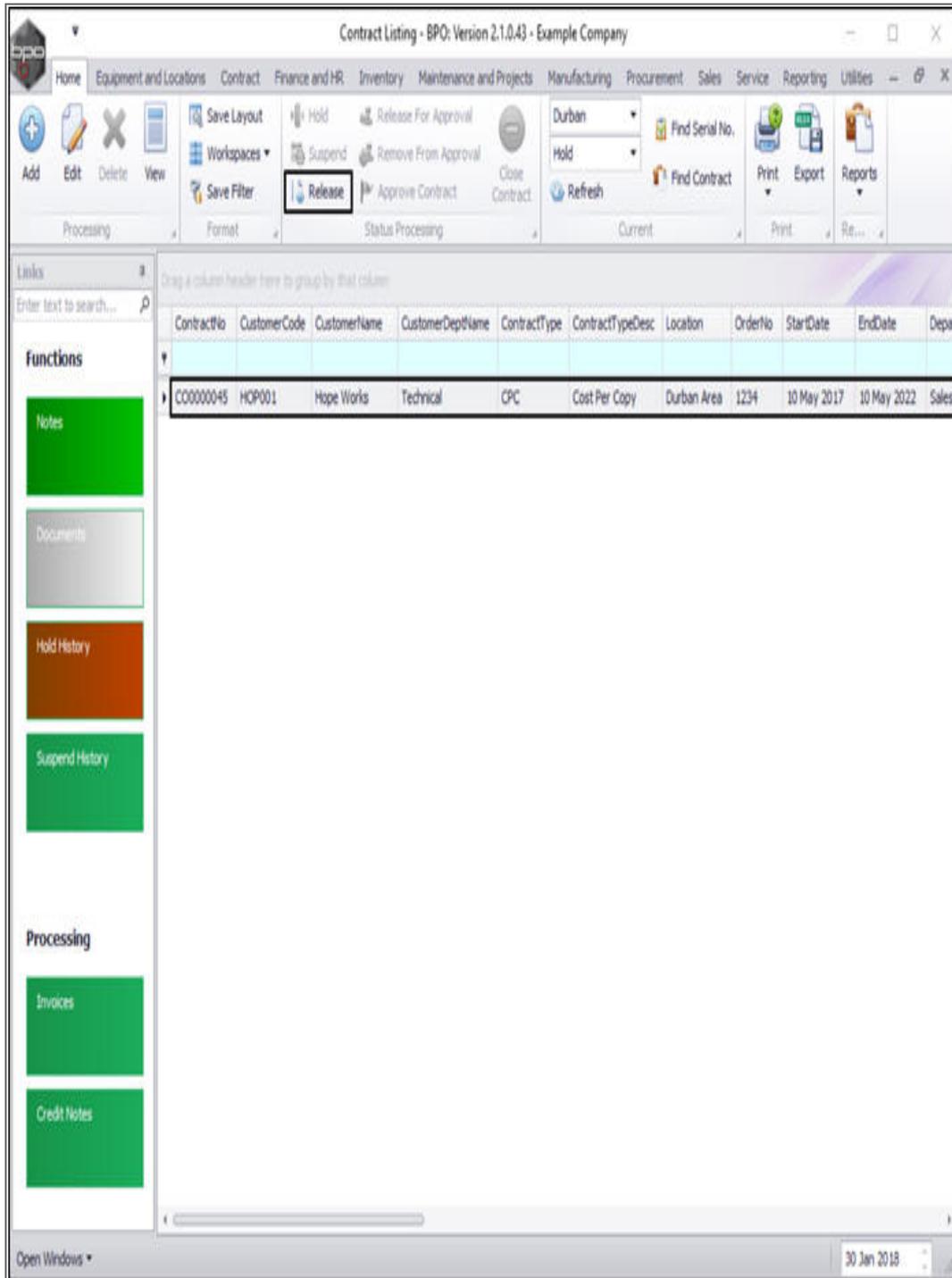
ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractDesc	ContractStatus	ContractNo	StarDate	EndDate	Depart
CO0000006	OFF001	Office Supples ...		CPC				22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supples ...		CPC	Cost Per Copy Forest Hills ...			07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dyn...		CPC	Cost Per Copy Main		Contra...	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy South Ridn...			16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy Main			16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy Main			13 Jun 2014	13 Jun 2019	Sales
CO0000019	OFF001	Office Supples ...		CPC	Cost Per Copy Main			28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy Main			01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy Main			29 Jun 2015	29 Jun 2020	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract Kloof	test		23 Mar 2016	23 Mar 2021	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy Hillcrest			24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy Main			05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy Main			07 Sep 2016	07 Sep 2021	Techn
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy Durban Area			01 Aug 2016	07 Sep 2021	Sales
CO0000044	BOT0001	Bothas Networ...		PRE	Prepaid Contract Durban Area			25 Oct 2016	25 Oct 2021	Techn
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy Kloof			16 May 2017	16 May 2022	Techn

## **SELECT CONTRACT**

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The screen will now display all contracts in the selected Site that are sitting in the **Hold** status.

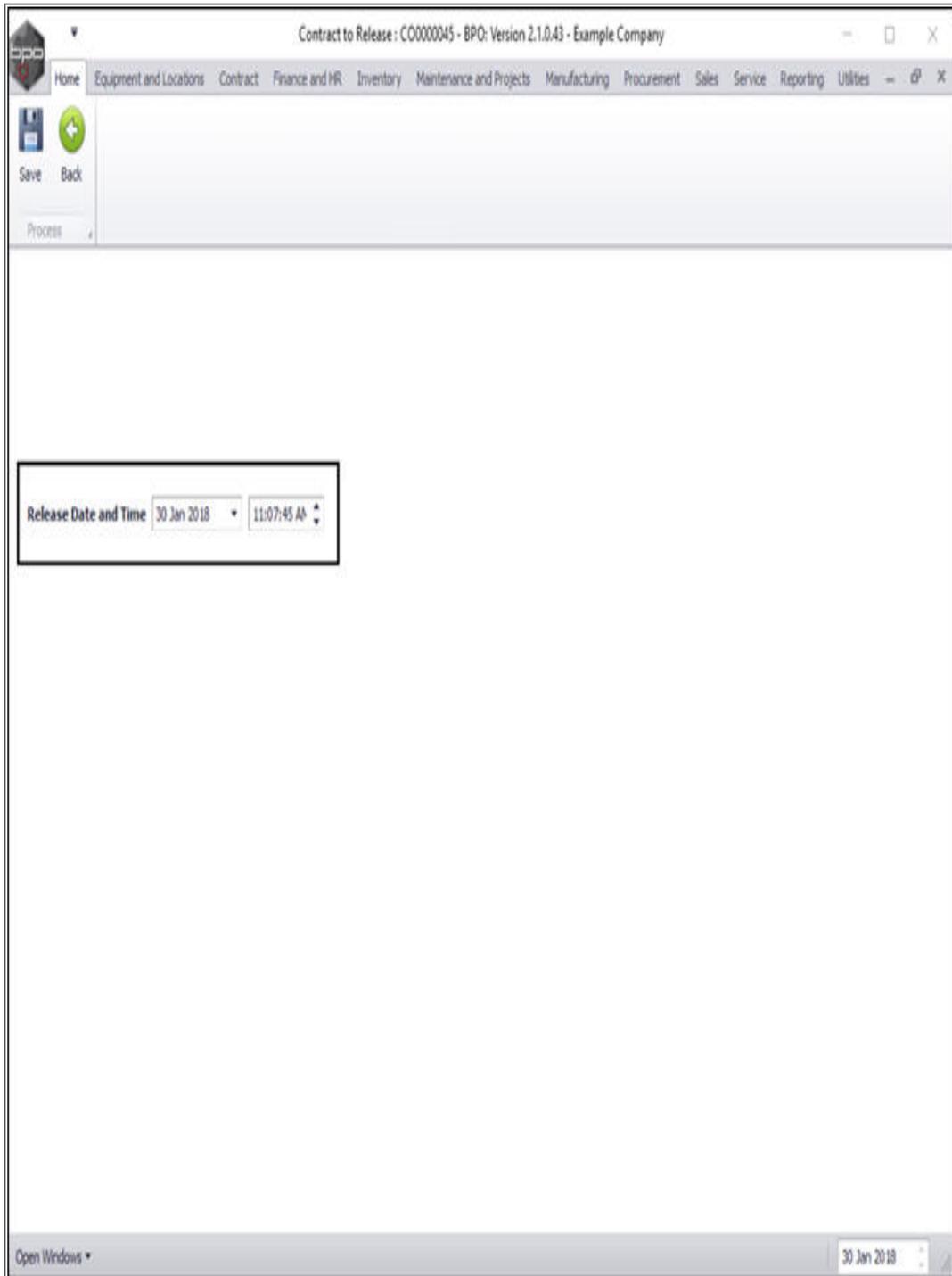
- If there is **more than one contract** in this listing screen, ensure that the **row** of the contract that you wish to release is selected.
- Click on **Release**.



## ADD RELEASE DETAILS

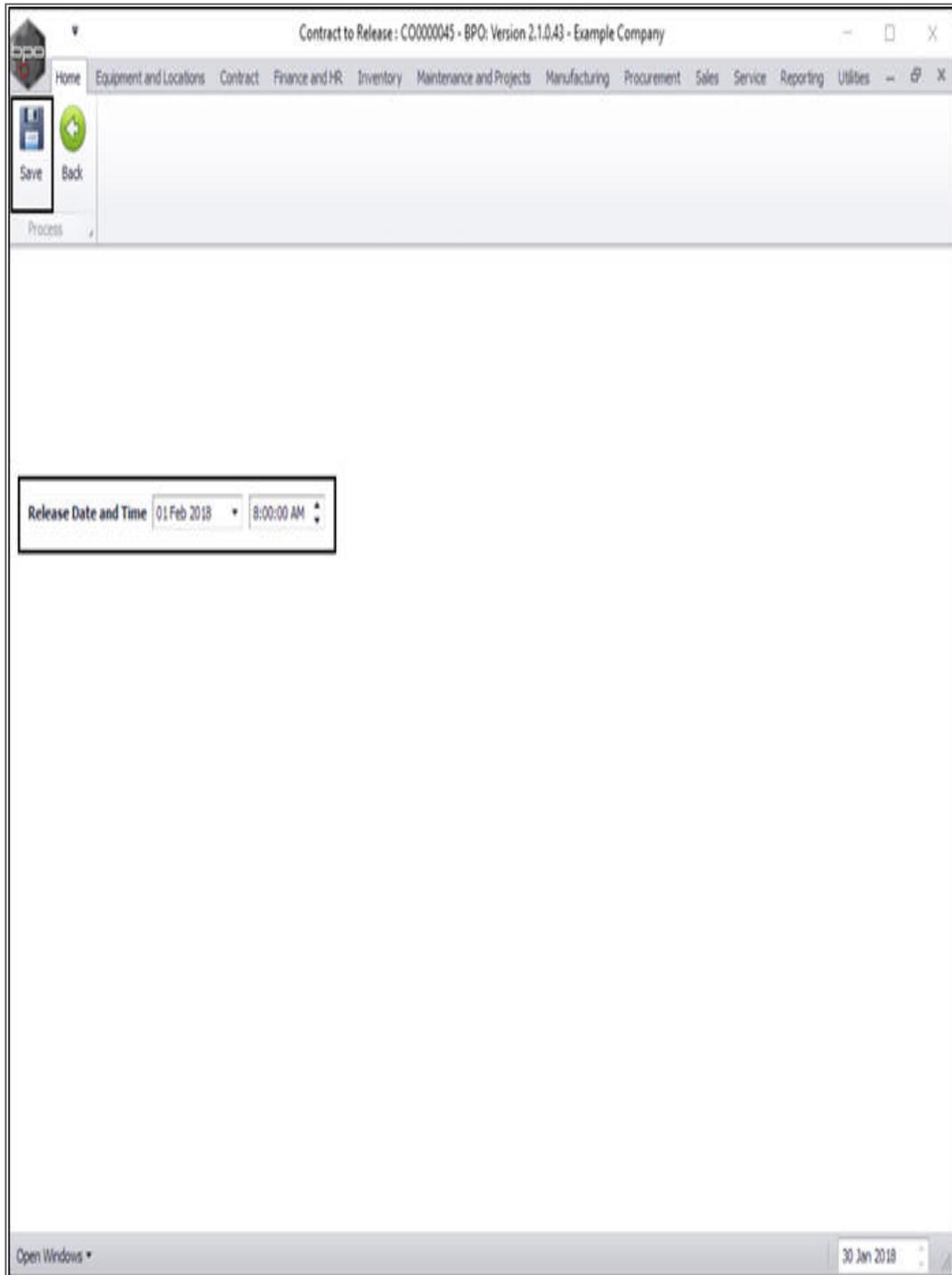
The *Contract to Release: []* screen will be displayed.

- **Release Date and Time:** This will auto populate with the current date and time.
  - **Date:** Either type in or click on the drop-down arrow and use the calendar function to select an alternative release date.
  - **Time:** Either type in or use the arrow indicators to select an alternative release time.



## SAVE RELEASE DETAILS

- When you have selected your date and time, click on **Save**.



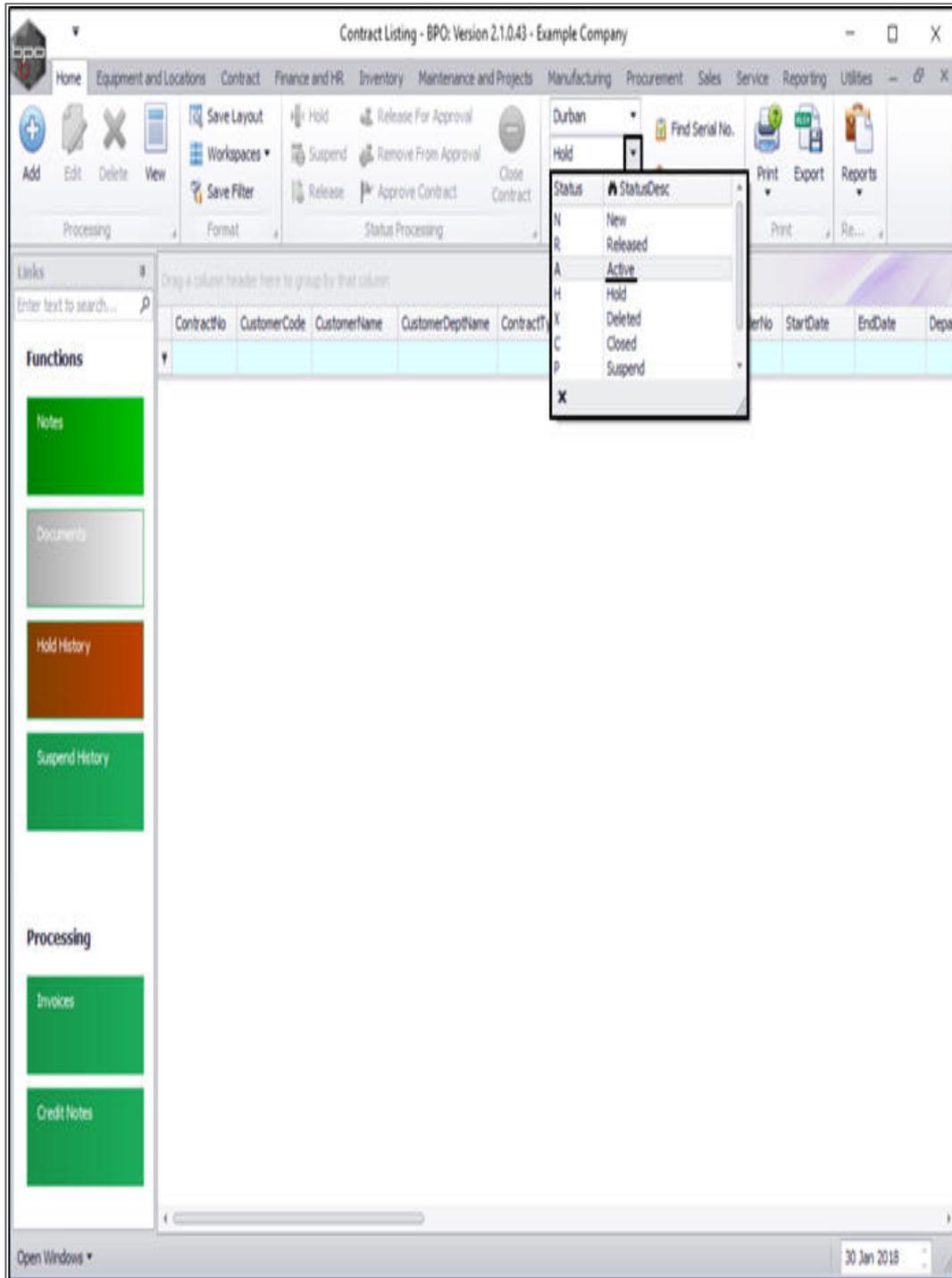
The contract will be **removed** from the Contract Listing screen where the status is set to **Hold**.

- A ***Contract Processing*** message box will pop up informing you that;
  - ***Contract No: [] has been released.***
- Click on ***OK***.

The screenshot shows the CO3 BPO software interface. The title bar reads "Contract Listing - BPO: Version 2.1.0.43 - Example Company". The ribbon menu includes tabs for Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The ribbon contains various action buttons such as Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Hold, Release, Suspend, Remove From Approval, Release For Approval, Approve Contract, Close Contract, Refresh, Find Serial No., Find Contract, Print, Export, and Reports. A table with columns ContractNo, CustomerCode, CustomerName, CustomerDeptName, ContractType, ContractTypeDesc, Location, OrderNo, StartDate, EndDate, and Depart is visible. A "Contract Processing" dialog box is open in the center, displaying an information icon and the text "Contract No : C00000045 has been released." with an "OK" button. The left sidebar has sections for Functions (Notes, Documents, Hold History, Suspend History) and Processing (Invoices, Credit Notes). The bottom status bar shows "Open Windows" and the date "30 Jan 2018".

## VIEW RELEASED CONTRACT IN ACTIVE STATE

- Select the **Active** status.



- You can now view the **released** contract in the Contract Listing screen where the status is set to **Active**.

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

Save Layout Hold Release For Approval Durban Find Serial No. Find Contract Print Export Reports

Suspend Remove From Approval Active Refresh

Release Approve Contract Close Contract

Processing Format Status Processing Current Print Re...

Links

Enter text to search...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Depart
CO0000006	OFF001	Office Supples ...		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014	22 Apr 2019	Sales
CO0000007	OFF001	Office Supples ...		CPC	Cost Per Copy	Forest Hills ...		07 Jan 2014	07 Jan 2019	Sales
CO0000011	WES001	Westwood Dyn...		CPC	Cost Per Copy	Main	Contra...	09 May 2014	09 May 2019	Sales
CO0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO0000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	Sales
CO0000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	Sales
CO0000019	OFF001	Office Supples ...		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	Sales
CO0000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	Sales
CO0000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	Sales
PC0000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	Sales
CO0000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016	24 Mar 2021	Sales
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	Sales
CO0000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	Techn
CO0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO0000044	BOT0001	Bothas Networ...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Techn
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales
CO0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	Techn

Open Windows 30 Jan 2018

MNU.112.017