

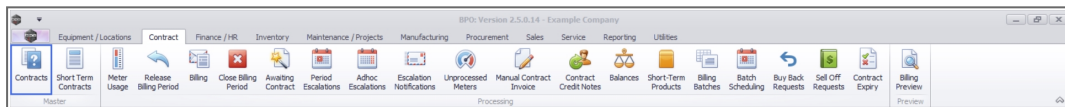
CONTRACT

LINK ADDITIONAL ITEMS

You can link additional contract items and accessories to a contract using the process set out below.

Items can only be linked when a Contract is in the **New** or **Active** status.

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	SAM001	Sanambhas 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.

|

CONTRACT ITEMS FRAME

- **Right click** anywhere in the **row** of the **Contract Items** frame.

|

- A **Process** menu will pop up.
- From this menu, you can:
 - Add a new machine item
 - Add a new location item
 - Delete a contract item

|

ADD NEW MACHINE ITEM

Where you have a serialised item that requires maintenance or service, the item can be linked to the contract.

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

|

- The **Select a new item** pop up screen will appear, listing all customer assets sold to or created against this customer; or rental assets issued to this customer.
- Select the **row** of the **item** 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** if configured on the asset's part code
- **Serial No**
- **Asset Register No** if configured on the asset

Note: The **LocationDesc** column will not be populated as this is a Machine (asset) Contract item and not a Location Contract Item.

▮

ADD NEW LOCATION ITEM

Instead of linking a serialised item, you have the ability to link a location to the contract. This can be used where a room or building requires maintenance or service.

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

▮

- The **Select a new item** pop up screen will appear, listing all [customer locations](#).
- Select the **row** of the **item** that you wish to **link** to this contract.
- Click on **Ok**.

▮

- The following columns will auto populate according to your item selection:
 - **LocationDesc**
 - **Description**
 - **Category Description**
 - **Model No** if configured on the asset's part code

- **Serial No**
- **Asset Register No** if configured on the asset

Note: The **PartCode**, **Description**, **Category Description**, **Model No**, **Serial Number**, and **Asset Register No** columns will not be populated as this is a Location Contract item and not a Machine (asset) Contract Item.

▮

CONTRACT ITEM MAIN DETAILS

Whether you are linking a Machine or Location, the following item details should be configured.

Link Location

This is the location of the contract item, e.g. Reception, used to assist the technician with finding the item on site.

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

▮

Link Shipping Address

This is the physical address where the contract item is.

A new company config flag ([AutoUpdateShippingAddress](#)) is available in BPO2 v2.5.0.8 (or higher) to control automated shipping address updates in BPO2 between contract items and equipment shipping addresses/ functional location shipping address and ensures the shipping address correlates to contract items shipping address. When you update the shipping address on a contract the shipping address will reflect on the asset or functional location. If the user updates the asset or functional location's shipping address, the shipping address will reflect on the contract item.

- 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.
- Select the **row** 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) if applicable.
 - **Note 1:** If this is set up, **SLA** will apply every time a call is logged against the contract / contract item. **SLA** will be calculated based on the shift pattern (customer's trading hours) e.g. if the trading hours are from 8am - 5pm and a call is logged at 4pm, **SLA** will start calculating at 4pm and stop at 5pm and resume the following day at 8am.

- **Note 2:** For **SLA** to work, the **shift** must be set up in **BPO Configurator** and **linked to the customer**.
- **Note 3:** The SLA Monitoring Service must be **installed**, **configured** and running to fully utilise this functionality.

▮

Link Travel Radius and Travel Charge

If you need to ensure travel is charged each time a call is raised for the contract item, set up a **Travel Radius** (distance) and **Travel Charge Rate** (per km). Also see [Travel Radii](#).

- Click in the **Travel Radius** text box.
- Type in or use the arrow indicators to select the distance in km 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.
- 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).
 - **Note:** If you input a non-zero value, each time a call is logged against the contract item and the technician travels outside the specified **Travel Radius**, the **Travel Charge Rate** will be applied. You will not be able to close the call until the travel charges incurred are invoiced.

▮

- The ***Is Extra*** flag is to indicate whether the item is an accessory to the main item on contract.
- The ***Status*** field is static and there to show you the that the item is active.

CONTRACT ITEM ADDITIONAL DETAILS

Whether you are linking a Machine or Location, the following item details should be configured, where applicable.

▮

- Here you can click on four different tabs to add or edit:
 - **Item Fees:** periodic charges e.g. monthly
 - **Item Meters:** meter usage charges
 - **Item Inclusions:** non billable items that are included in the contract
 - **Item Contacts:** the contact person - per machine.

SAVE THE CONTRACT

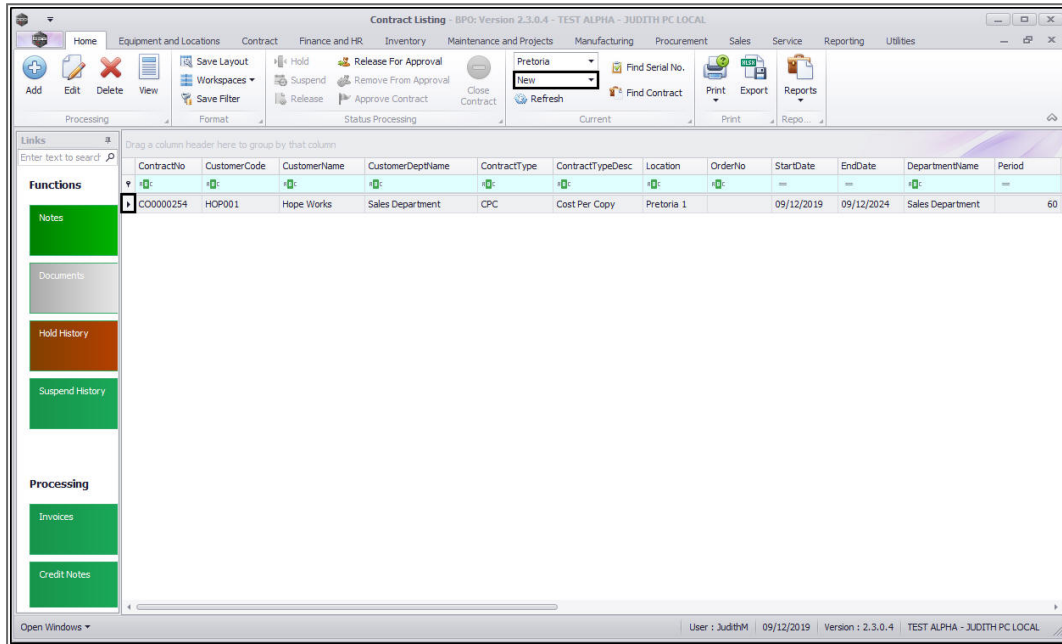
- When you are done, click on ***Save***.

▮

- 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.



MNU.112.019

