

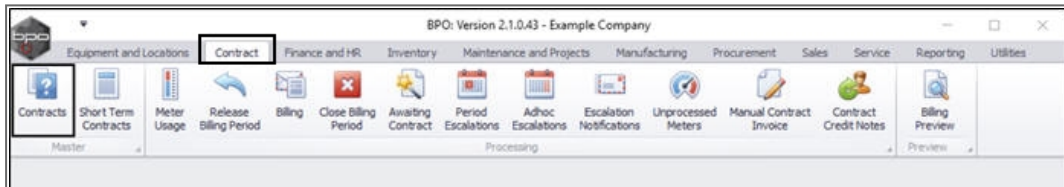
# CONTRACT

## CONTRACTS - RELEASE FOR APPROVAL

Contracts need to be **released** and **approved**, thereby making them **active**. These active contracts will then be included in the month end billing run and calls can be logged against them.

Follow the process below to **release** a Contract for approval.

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



The **Contract Listing** screen will display.

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

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	Cost Per Copy	Location	Contract No	StartDate	EndDate	Department
CO000006	OFF001	Office Supplies ...		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014	22 Apr 2019	Sales
CO000007	OFF001	Office Supplies ...		CPC	Cost Per Copy	Forest Hills ...		07 Jan 2014	07 Jan 2019	Sales
CO000011	WES001	Westwood Dyn...		CPC	Cost Per Copy	Main	Contra...	09 May 2014	09 May 2019	Sales
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014	16 May 2019	Sales
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014	13 Jun 2019	Sales
CO000019	OFF001	Office Supplies ...		CPC	Cost Per Copy	Main		28 Jul 2014	28 Jul 2019	Sales
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011	31 Jan 2016	Sales
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	Sales
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	Sales
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016	24 Mar 2021	Sales
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016	05 Jul 2021	Sales
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016	07 Sep 2021	Techn
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO000044	BOT0001	Bothas Networ...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Techn
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	Techn

- 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 **New** status.

The screenshot shows the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' interface. A dropdown menu is open over the 'Status' column of a table, with 'New' selected. The table contains various contract records with columns for ContractNo, CustomerCode, CustomerName, CustomerDeptName, ContractType, and dates.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractStatus	StartDate	EndDate	Department
CO000006	OFF001	Office Suppl...		CPC	New	22 Apr 2014	22 Apr 2019	Sales
CO000007	OFF001	Office Suppl...		CPC	Released	07 Jan 2014	07 Jan 2019	Sales
CO000011	WES001	Westwood Dyn...		CPC	Active	09 May 2014	09 May 2019	Sales
CO000013	TIA001	Titan Group		CPC	Hold	16 May 2014	16 May 2019	Sales
CO000014	TIA001	Titan Group		CPC	Deleted	16 May 2014	16 May 2019	Sales
CO000016	TIA001	Titan Group		CPC	Closed	13 Jun 2014	13 Jun 2019	Sales
CO000019	OFF001	Office Suppl...		CPC	Suspend	28 Jul 2014	28 Jul 2019	Sales
CO000020	HOP001	Hope Works	Technical	CPC	Active	01 Jan 2011	31 Jan 2016	Sales
CO000028	HAC001	Hack PC - IT Shop		CPC	Active	29 Jun 2015	29 Jun 2020	Sales
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	23 Mar 2016	23 Mar 2021	Sales
CO000031	YES001	Young Electric	Sales Department	CPC	Active	24 Mar 2016	24 Mar 2021	Sales
CO000041	PAN001	Panda Copiers		CPC	Active	05 Jul 2016	05 Jul 2021	Sales
CO000042	HOP001	Hope Works	Technical	CPC	Active	07 Sep 2016	07 Sep 2021	Techn
CO000043	HOP001	Hope Works	Technical	CPC	Active	01 Aug 2016	07 Sep 2021	Sales
CO000044	BOT0001	Bothas Networ...		PRE	Prepaid Contract	25 Oct 2016	25 Oct 2021	Techn
CO000047	HOP001	Hope Works	Technical	CPC	Active	16 May 2017	16 May 2022	Techn

### **SELECT CONTRACT**

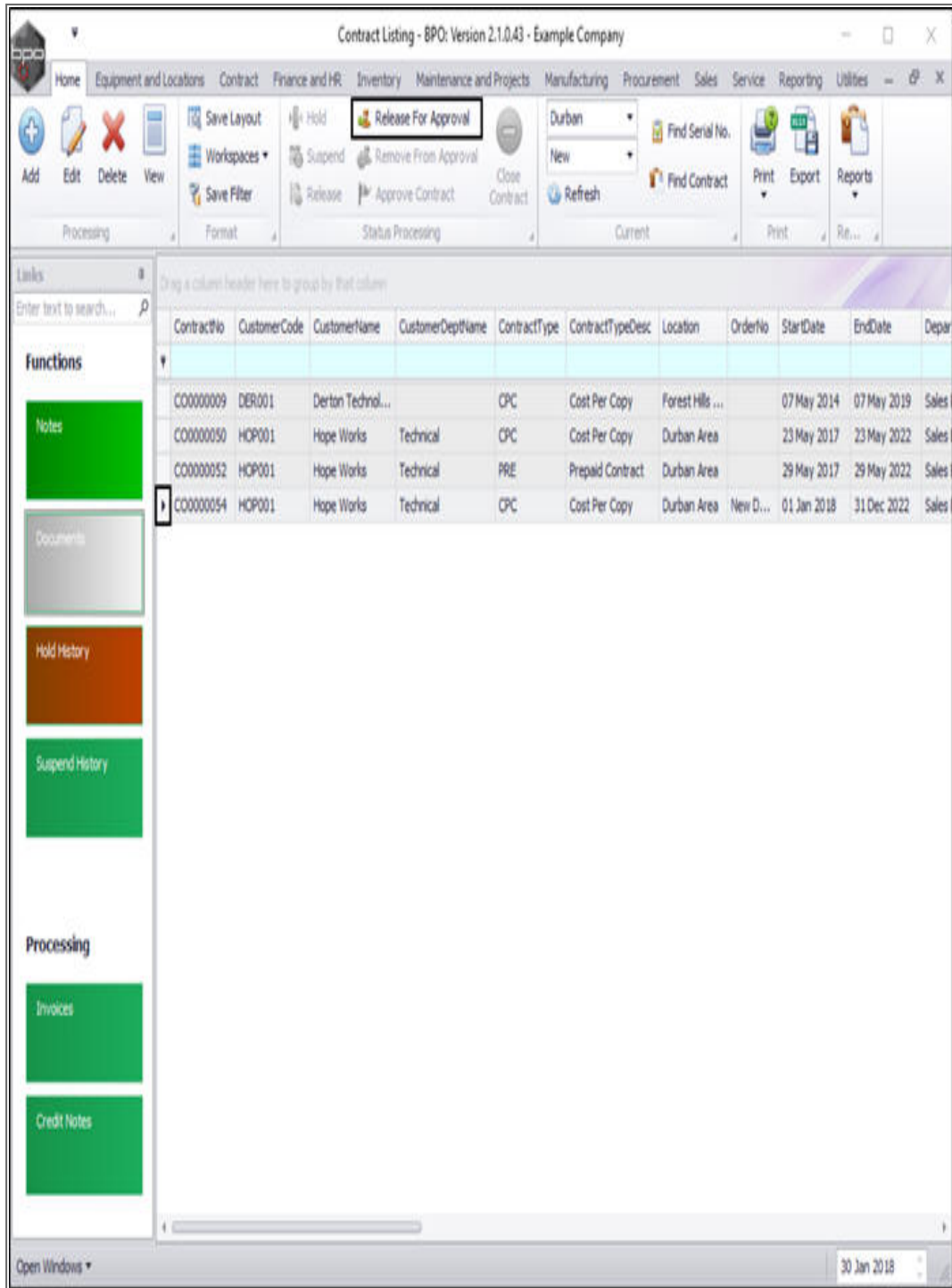
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- Select the *row* of the contract you wish to *release*.

### **RELEASE CONTRACT**

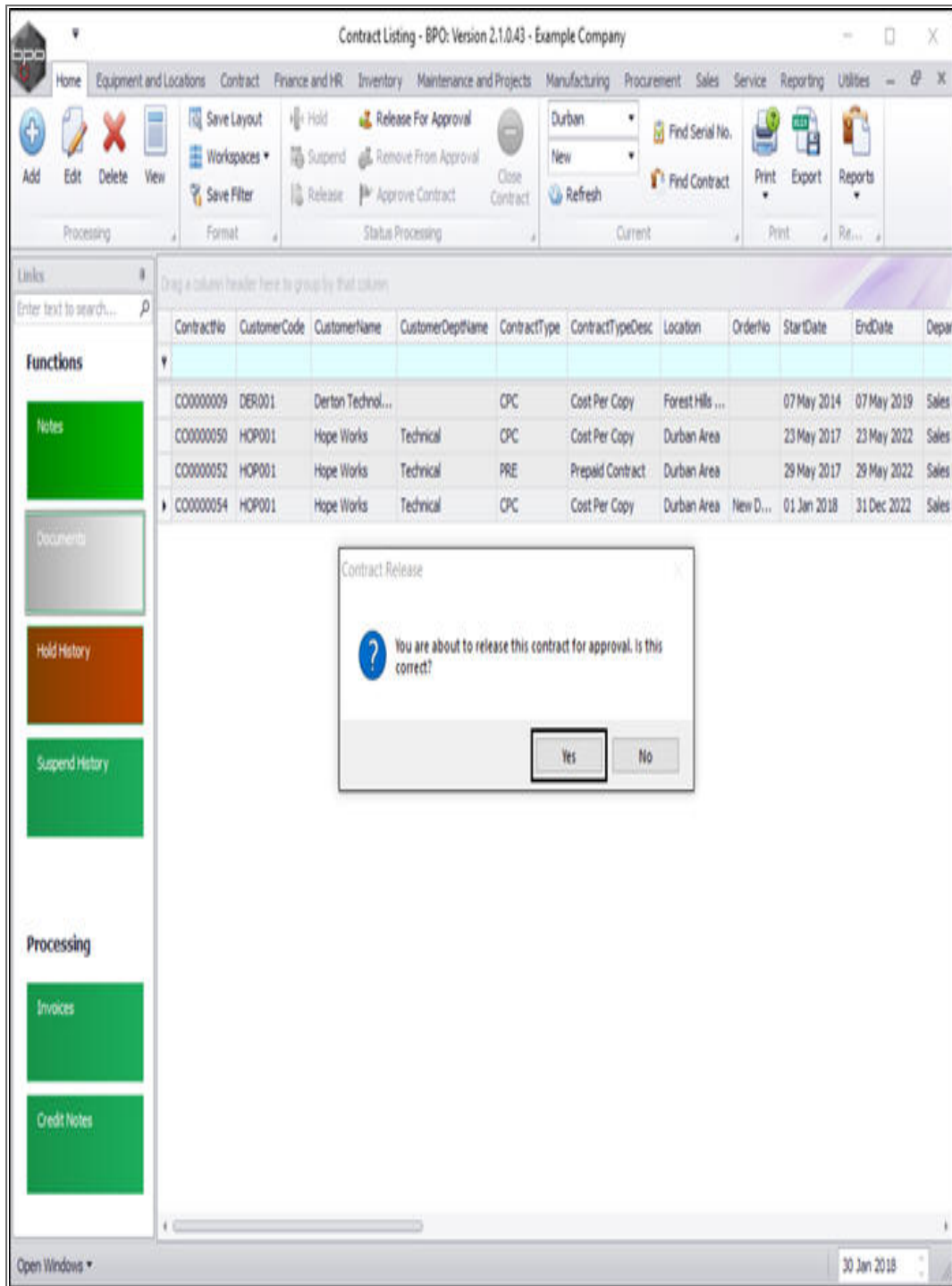
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- Click on *Release For Approval*.



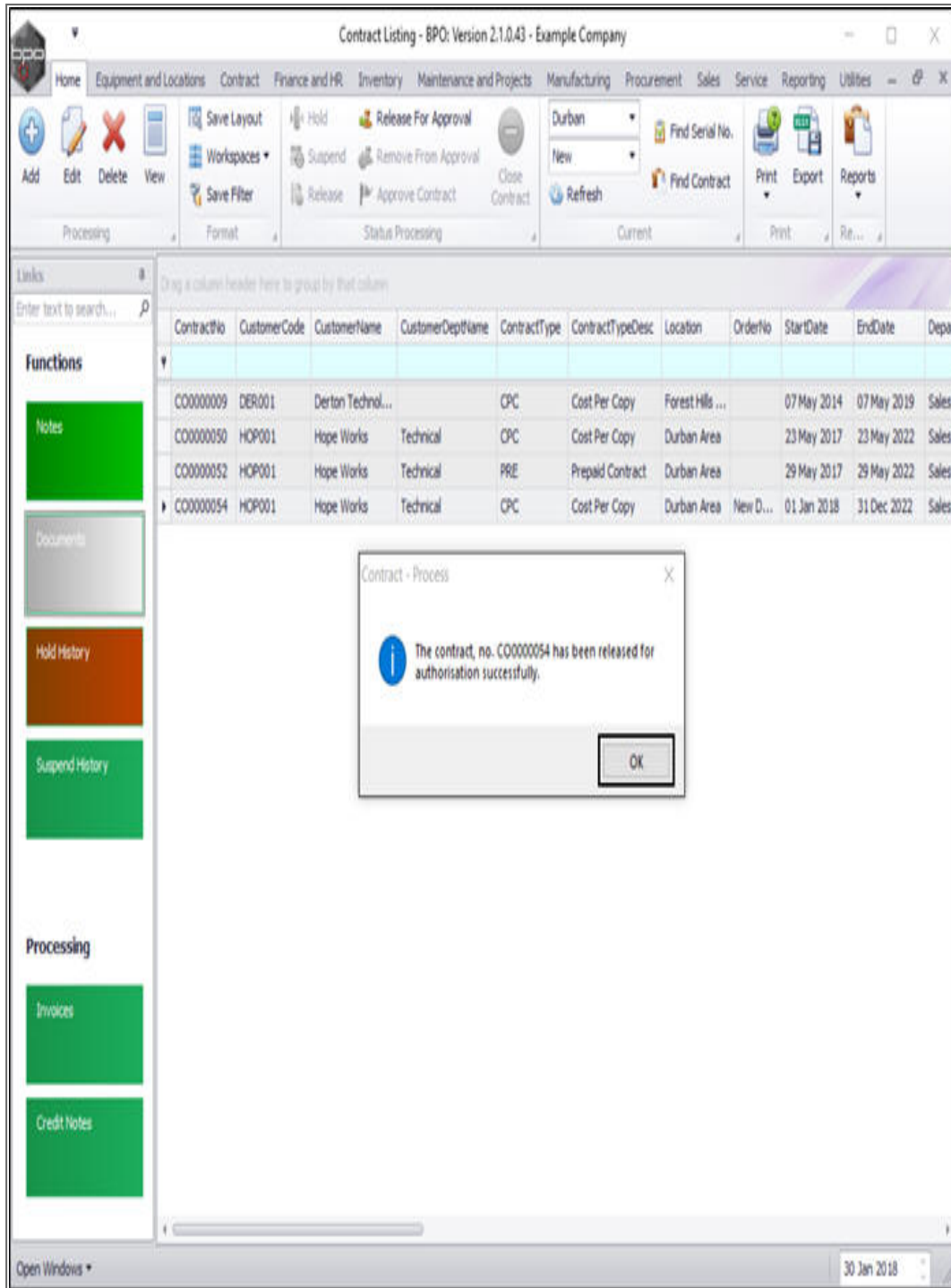
- A **Contract Release** message box will pop up with the following prompt:

- *You are about to release the contract for approval, is this correct?*
- Click on **Yes**.



- A **Contract - Process** message box will pop up advising the following:
  - *The contract, no. [] has been released for authorisation successfully.*
- Click on **Ok**.





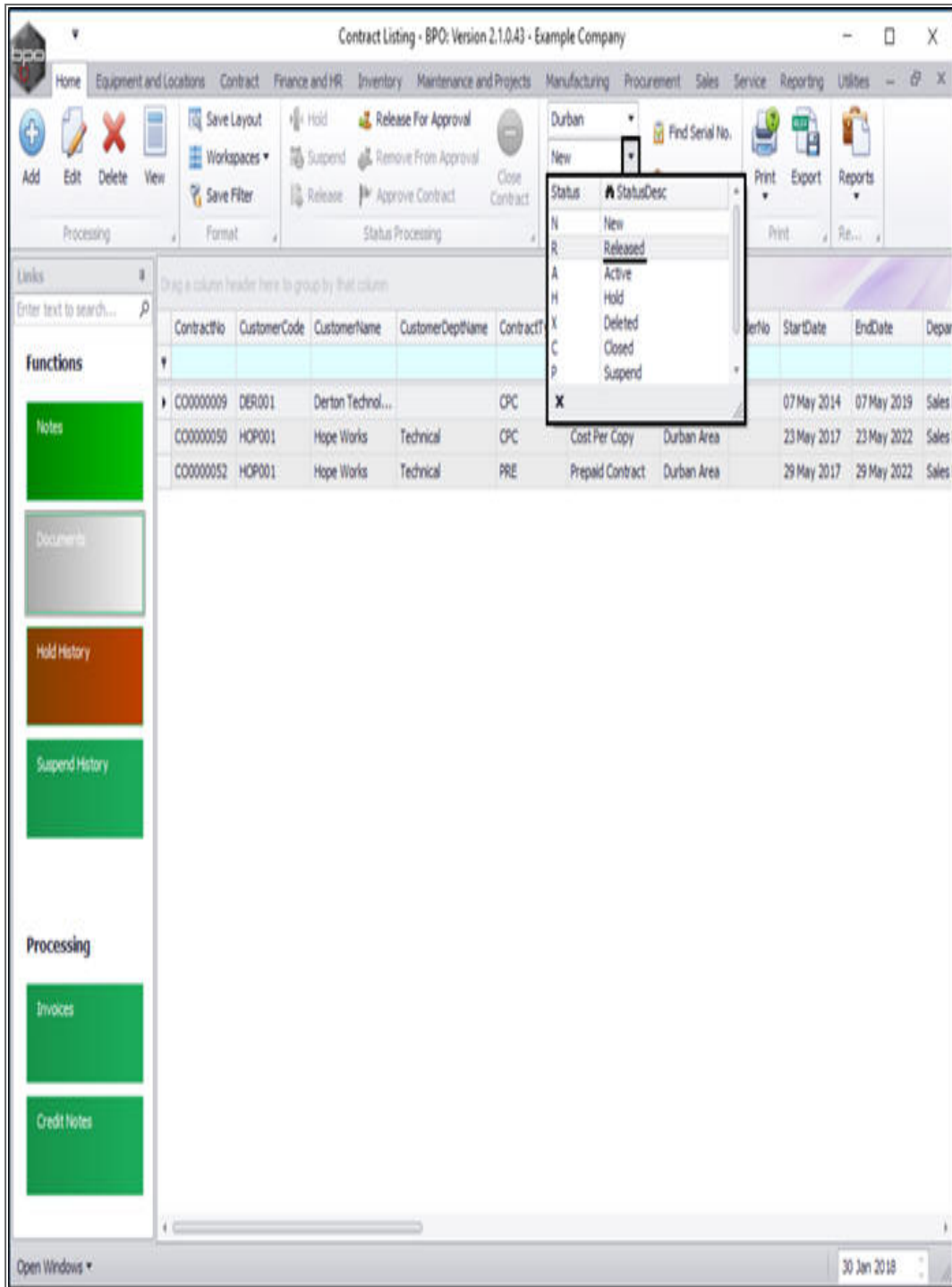
- The contract will now be **removed** from the Contract Listing screen where the status is set to **New**.



ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Depar
CO000009	DER001	Derton Technol...		CPC	Cost Per Copy	Forest Hills ...		07 May 2014	07 May 2019	Sales
CO000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales
CO000052	HOP001	Hope Works	Technical	PRE	Prepaid Contract	Durban Area		29 May 2017	29 May 2022	Sales

## VIEW CONTRACT IN RELEASE STATUS

- Select the **Released** status.



- You can now find the contract in the **Contract Listing** screen where the status is set to **Released**.

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 | Released | Find Contract | Print | Export | Reports  
 Save Filter | Release | Approve Contract | Close Contract | Refresh

Processing | Format | Status Processing | Current | Print | Pr...

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	Depar
CO000008	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Forest Hills ...	abc123	07 May 2014	07 May 2019	Sales
CO000010	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Jolly Farm ...		05 Jan 2011	07 Jan 2016	Sales
CO000012	TIA001	Titan Group		CPC	Cost Per Copy	South Ridn...		16 May 2014	16 May 2019	Sales
CO000054	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	New D...	01 Jan 2018	31 Dec 2022	Sales

**Functions**  
 Notes  
 Documents  
 Hold History  
 Suspend History

**Processing**  
 Invoices  
 Credit Notes

Open Windows | 30 Jan 2018

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