

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.



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• 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.

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SELECT CONTRACT

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

RELEASE CONTRACT

• Click on *Release For Approval*.

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• 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*.



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



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VIEW CONTRACT IN RELEASE STATUS

• Select the *Released* status.



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



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