

CONTRACT

CONTRACTS - APPROVE A CONTRACT

A new contract will need to first be **Released** and then **Approved** before it will become **Active**.

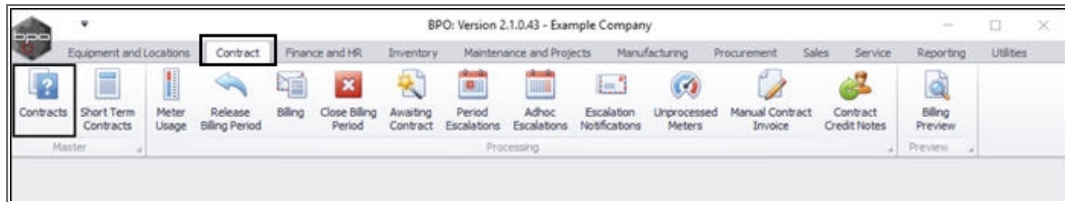
However, after a contract has been **Approved**, it could be moved back to the **Released** status due to contract amendments, so that the changes can be reviewed and then it will need to be **Approved** again.

A notification email will be sent to users who have the rights to authorise contracts.

These are the types of changes that will trigger the contract being *returned* to the **Released** status:

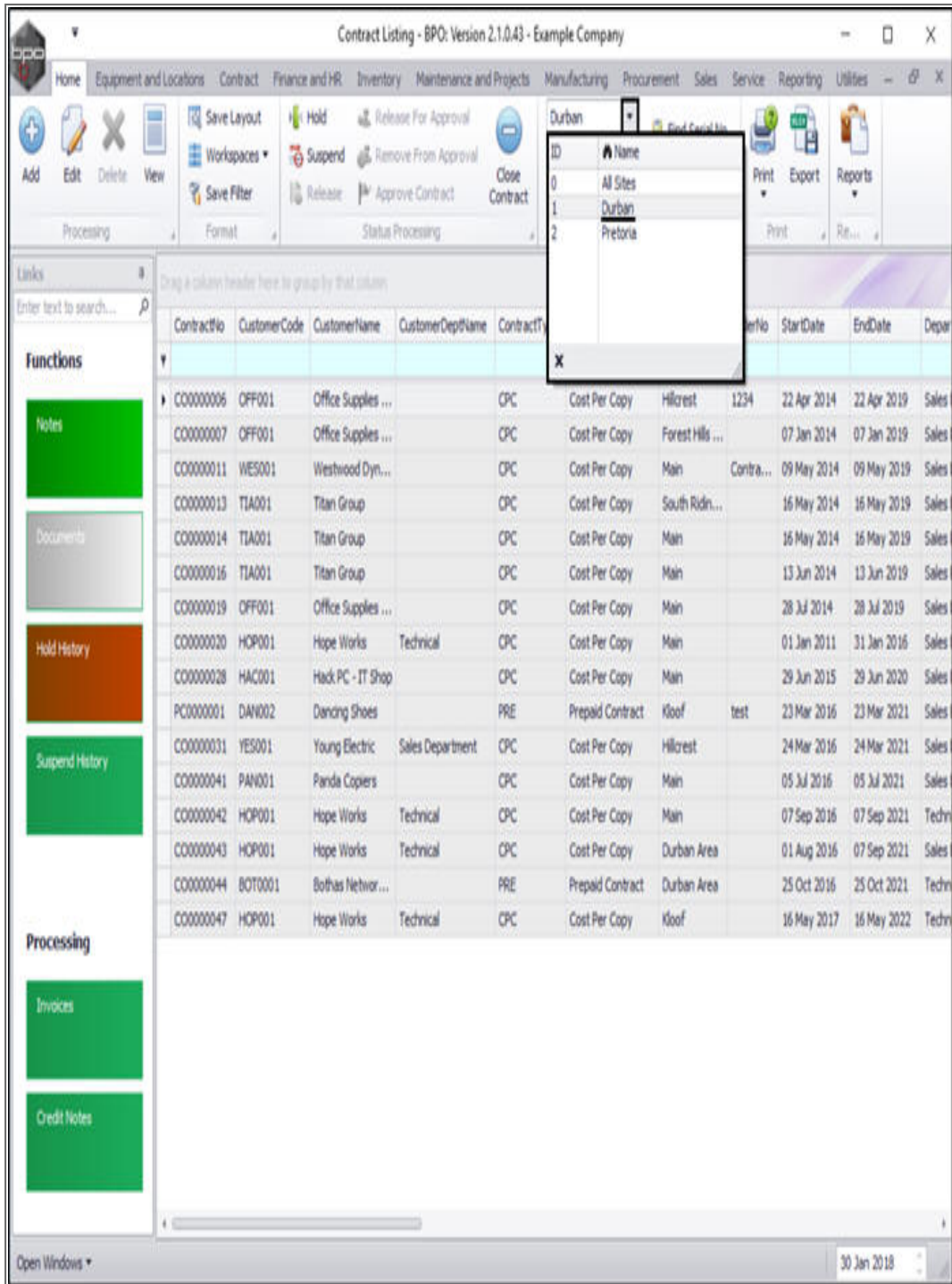
- any changes to the **Contract Type**, the **Customer** or the **Aggregate Billing flag**.
- if any contract **item** is added or removed
- if any contract item **fee** is added or removed.
- any changes to the **Billing Customer** on a fee or meter.
- any changes to the following **Contract Item Fee** details:
 - Amount, Start Date, End Date, Escalation %, Account Code, COS Account Code, Invoice Description, Billing Period, Billing Cycle, Finance Party, and Finance Amount.

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.



- 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 **Released** status.

The screenshot shows the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' window. The interface includes a menu bar, a toolbar with various actions like 'Add', 'Edit', 'Delete', 'View', 'Save Layout', 'Hold', 'Release For Approval', 'Suspend', 'Remove From Approval', 'Release', and 'Approve Contract'. A status dropdown menu is open, showing options: New, Released, Active, Hold, Deleted, Closed, and Suspend. The 'Released' option is highlighted. Below the menu is a table of contract records.

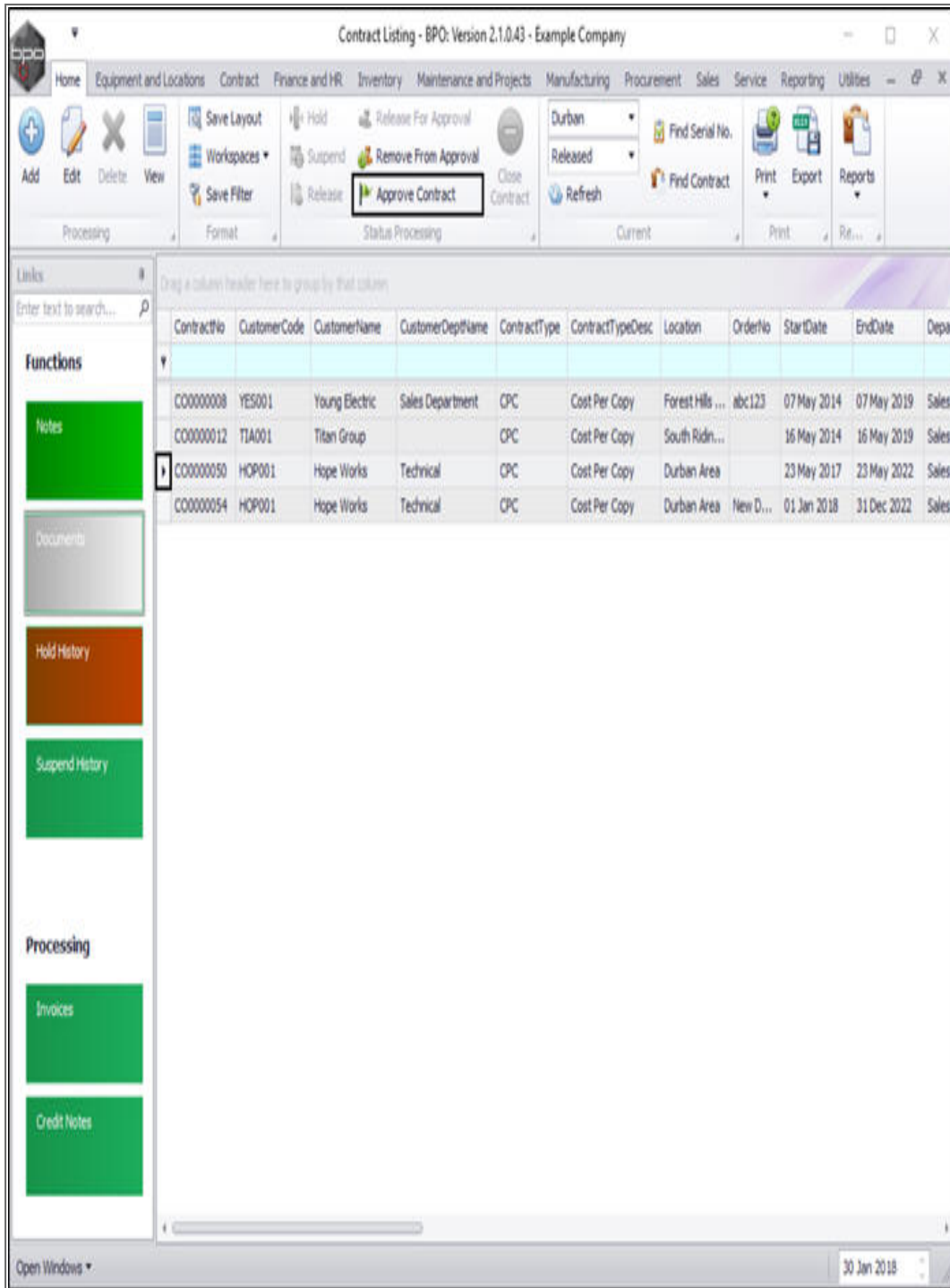
ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractStatus	ContractDesc	ContractNo	StartDate	EndDate	Depart
CO000006	OFF001	Office Suppl...		CPC				22 Apr 2014	22 Apr 2019	Sales
CO000007	OFF001	Office Suppl...		CPC	Cost Per Copy	Forest Hills ...		07 Jan 2014	07 Jan 2019	Sales
CO000011	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 Suppl...		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	Koof	test	23 Mar 2016	23 Mar 2021	Sales
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		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	BOT001	Bothas Networ...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Techn
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Koof		16 May 2017	16 May 2022	Techn

SELECT THE CONTRACT

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

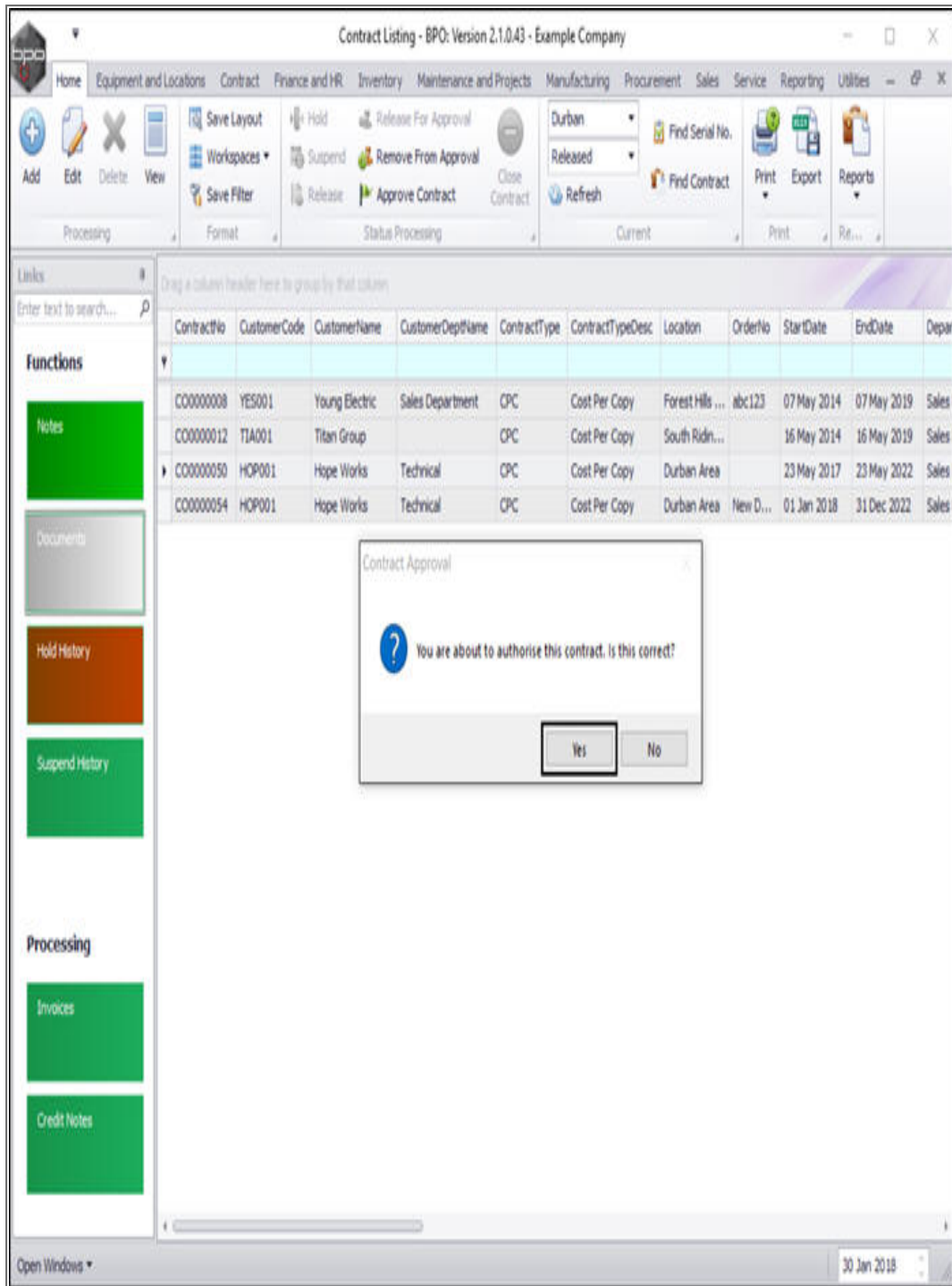
APPROVE CONTRACT

- Click on *Approve Contract*.

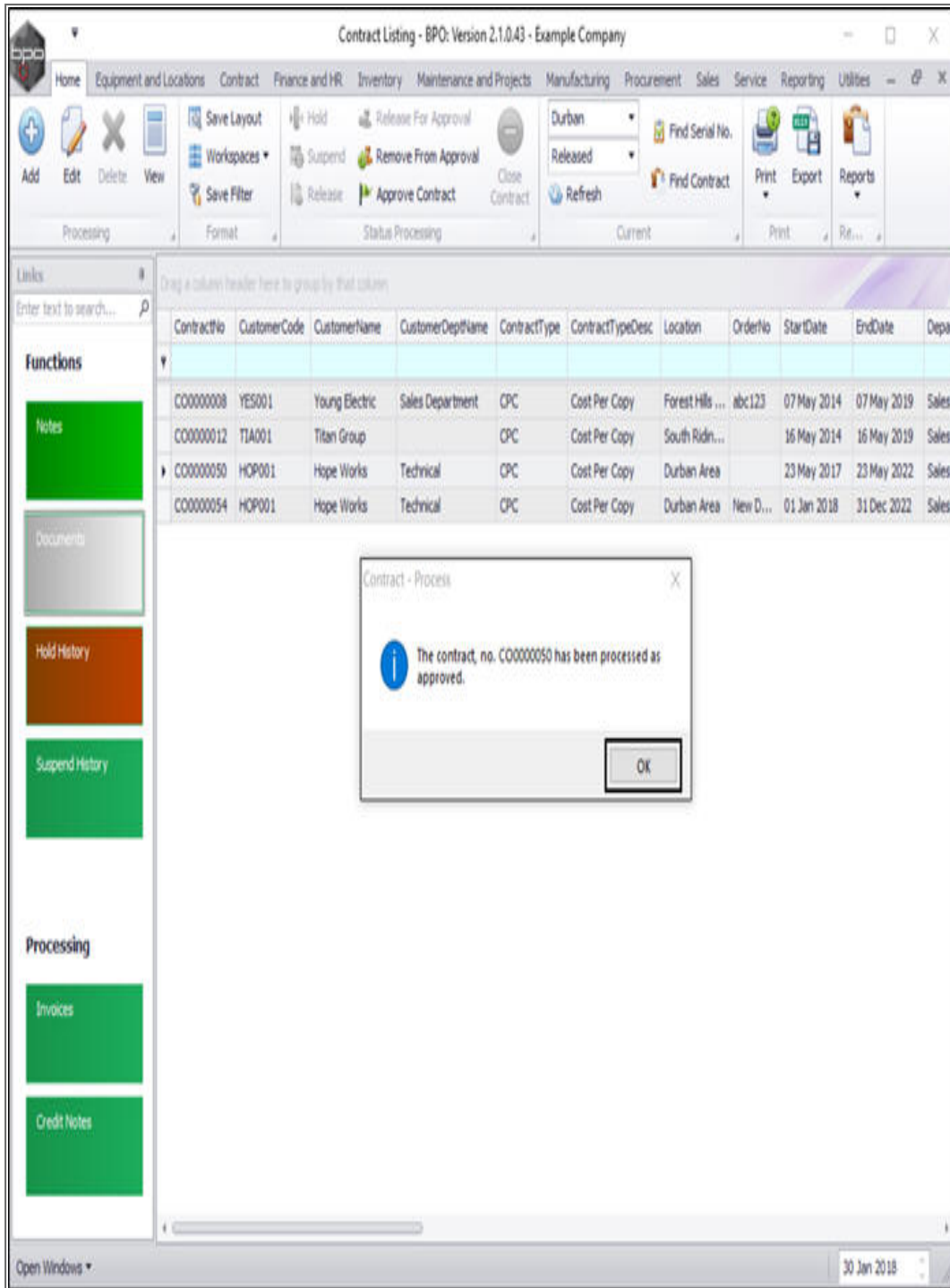


- A **Contract Approval** message box will pop up with the following prompt:

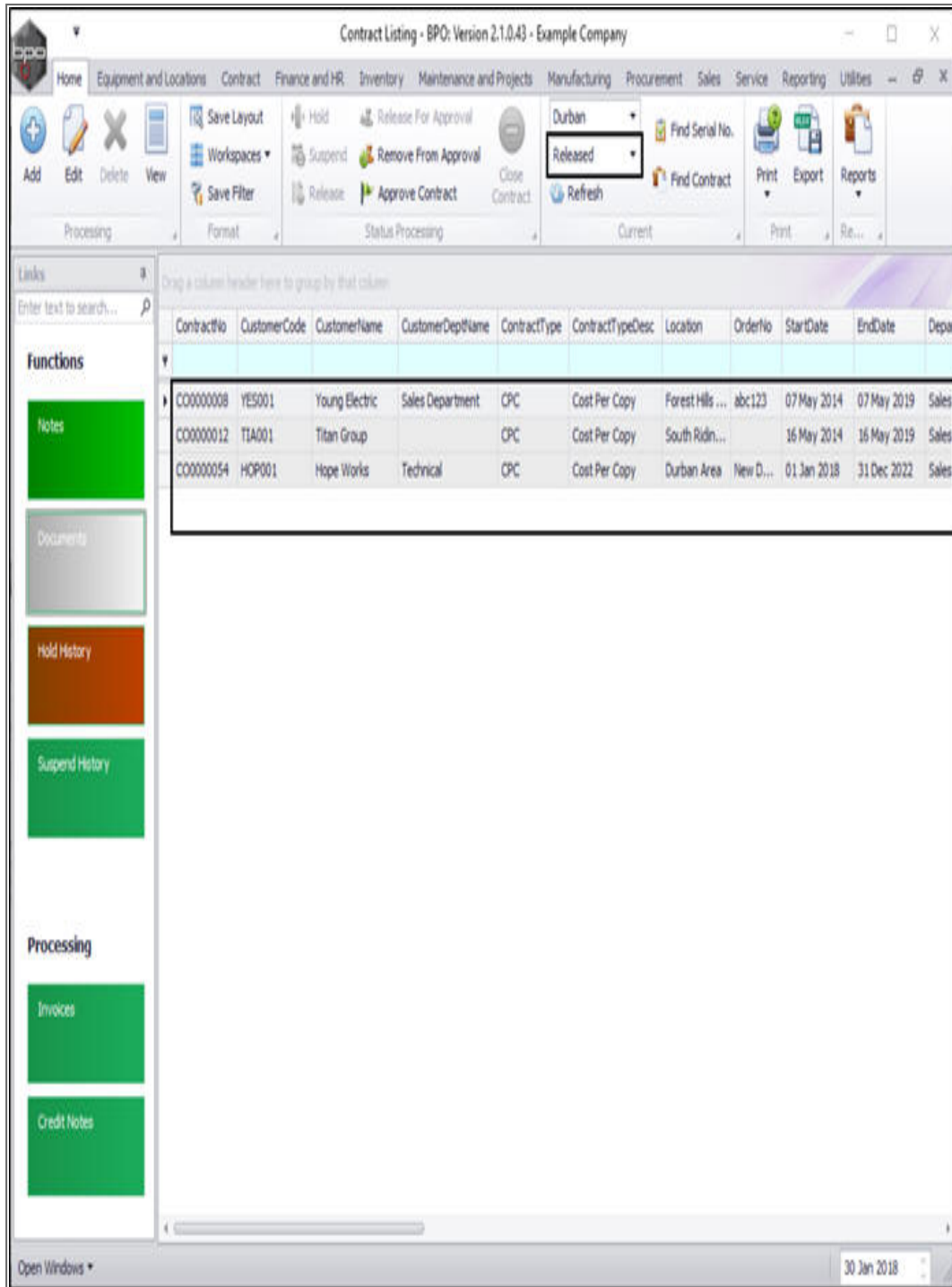
- *You are about to authorise this contract. Is that correct?*
- Click on **Yes**.



- A **Contract - Process** message box will pop up advising the following:
 - *The contract, no. [] has been processed as approved.*
- Click on **OK**.

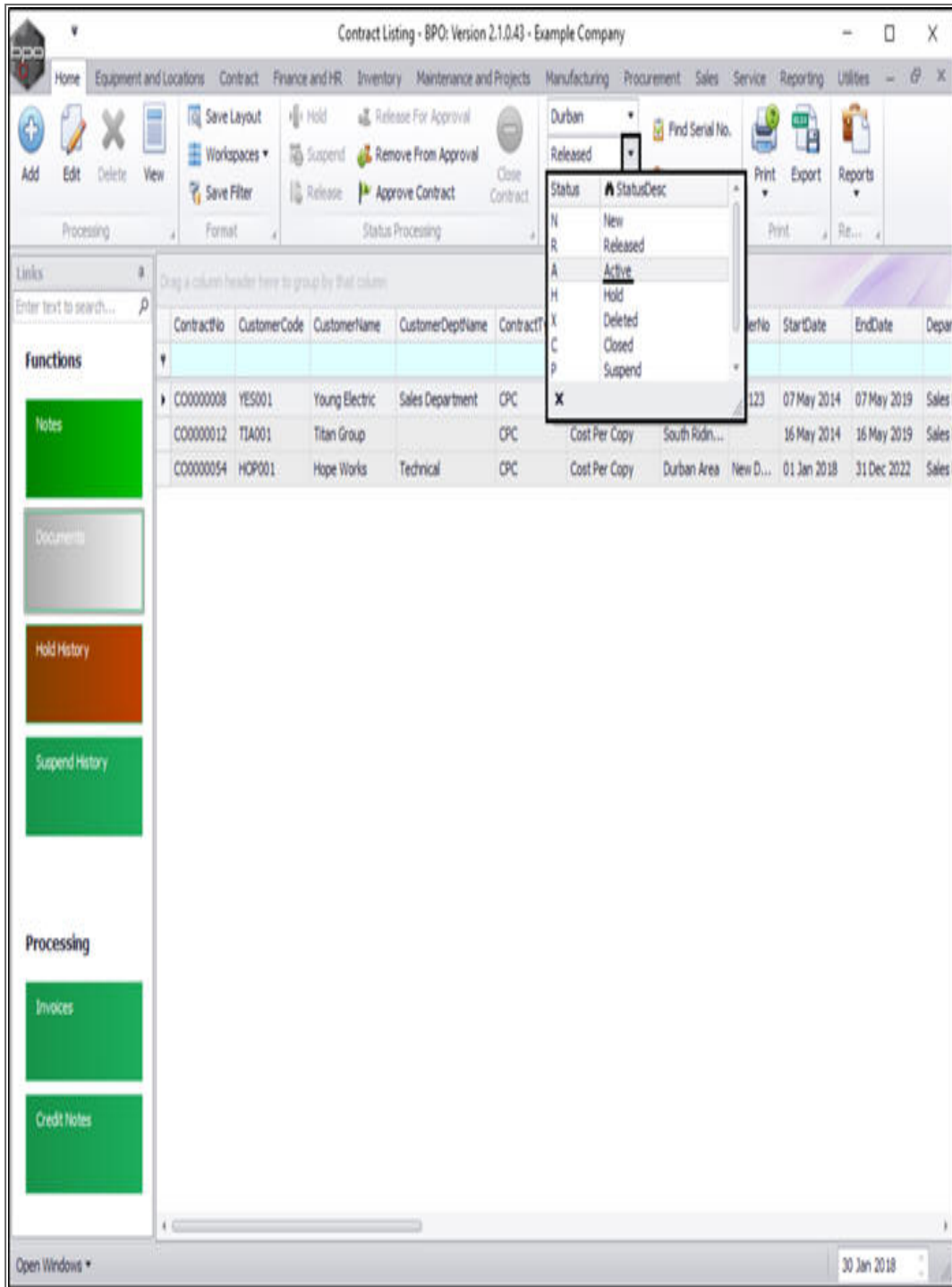


- The contract will be removed from the **Contract Listing** screen where the **status** is set to **Released**.



VIEW APPROVED CONTRACT IN ACTIVE STATUS

- Select the **Active** status.



- The contract can now be found 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

Add | Edit | Delete | View | Save Layout | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports
 Workspaces | Suspend | Remove From Approval | Active | Find Contract | Refresh | Print | Re...
 Save Filter | 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	Depar
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
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CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015	29 Jun 2020	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
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CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016	07 Sep 2021	Sales
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017	16 May 2022	Techn
CO000050	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		23 May 2017	23 May 2022	Sales
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016	23 Mar 2021	Sales
CO000044	BOT0001	Bothas Networ...		PRE	Prepaid Contract	Durban Area		25 Oct 2016	25 Oct 2021	Techn

Open Windows | 30 Jan 2018

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