

# CONTRACT

# **EDIT CONTRACT ITEM**

A contract **item** can be edited when the contract is in the **Active** state.

Certain amendments made to the contract item, will trigger the contract to be moved back to the <u>Released</u> state, in order for the contract to be checked and re-<u>Approved</u>. An email will then be sent to all users who have the rights to authorise this contract.

These are the changes involved that will trigger the re-Approval process:

- If any contract **Item** is <u>added</u> or removed
- If any contract Item Fee is added or removed
- If the **Billing Customer** on an Item Fee or Item Meter is changed.
- If any of the following details are <u>changed</u> on contract **Item Fees**:
  - ° Amount
  - ° Start Date
  - ° End Date
  - Escalation %
  - $^{\circ}$  Account Code
  - COS Account Code
  - ° Invoice Description
  - ° Billing Period
  - Billing Cycle
  - Finance Party
  - Finance Amount

#### 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 *Act-ive* contracts for the selected site.

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	CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co	Main		09/07/2014	09/07/2019	Sales Depar		60 Months	Months	5
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	CO0000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co	Main		01/08/2016	07/09/2021	Sales Depar		60 Months	Quarterly	5
	CO000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con	Durban Area		29/05/2017	29/05/2022	Sales Depar		60 Months	Months	3
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	CO000078	PIN0001	Pink Shoes		CPC	Cost Per Co	Durban Area		18/06/2018	18/06/2023	Sales Depar		60 Months	Months	4
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## **SELECT THE CONTRACT**

• Select the *row* of the *contract* that you wish to process.



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#### Edit Contract Item

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	CO000083	WE5001	Westwood Dynamic		OPC	Cost Per Co	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar		60 Months	Months	

• Click on the *Edit* button.

The *Contract Maintenance* screen will be displayed.

#### **EDIT ITEM DETAILS**

- Here you can make changes to the following contract *item* details:
  - $^{\circ}$  Location
  - ° Shipping Address
  - COS Account Code
  - ° SLA Hours
  - ° Travel Charge
  - ° Is Extra
- To make a change to any of these details, click in the relevant *field* of the selected item.



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#### **EDIT LOCATION**

- In this example, we have clicked in the *Location* field of the second contract item in the list.
  - The original location is *Reception*.



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- Type in the *new* location.
  - $^\circ~$  In this example, Second Floor has been typed in.



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#### EDIT TRAVEL RADIUS

• Note: This should be **0** if travel is <u>included</u> in the contract)



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- In this example, we have clicked in the *Travel Radius* field of the first machine in the list.
  - $^\circ~$  The Travel Radius is currently  ${\bf 0}.$



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- Either *type in* or use the *arrow indicators* to select the updated travel radius for this contract item (in kilometres).
  - In this example, the Travel Radius has been changed to
     42.

## **SAVE ITEM CHANGES**

## **SAVE THE CONTRACT**

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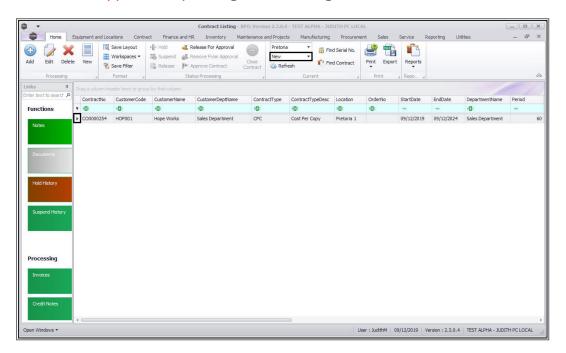
- When you are done, click on *Save*.
- The contract will be *saved* and you will return to the *Contract Listing* screen where the status defaults to *Active*, or will be set



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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.



#### NOTE ON CONTRACT TRIGGERS

Note: If the item detail that was changed, was one of the *triggers* that would move the contract back into the <u>Released</u> status, then you will need to change the



Contract Listing screen status to *Released* to be able to view the updated contract item details.

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