

# CONTRACT

## EDIT ITEM FEES

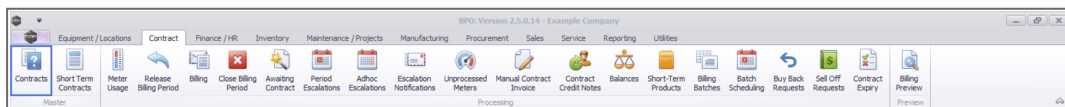
A contract **item fee** can be edited when the contract is in the **Active** state.

Certain amendments made to the contract **item fees**, will trigger the contract to be moved back to the **Released** state, in order for the contract to be checked and re-**Approved**. 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 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 changed on contract **Item Fees**:
  - Amount
  - Start Date
  - End Date
  - Escalation %
  - 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 here, 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	ContractType	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bills
CO000009	DER001	Derbon / Technologies	CPC	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months			3
CO000016	TIA001	Titan Group	CPC	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months			4
CO000018	SAN001	Sananthes Diner	CPC	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months			5
CO000019	OFF001	Office Supplies Unlimited	CPC	Main		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual			6
PC000001	DAN002	Dancing Shoes	PRE	Moof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months			1
CO000031	YES001	Young Electric	CPC	Hilcrest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months			1
CO000041	PAN001	Panda Copiers	CPC	Main		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months			5
CO000042	HCP001	Hope Works (Pty) Ltd	CPC	Main		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months			7
CO000043	HCP001	Hope Works (Pty) Ltd	CPC	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly			5
CO000052	HCP001	Hope Works (Pty) Ltd	PRE	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months			3
CO000054	APP0001	Apple Juice Inc	CPC	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months			0
CO000072	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area	1234	07/13/2018	07/03/2023	Sales Depart...	60 Months	Months			2
CO000073	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	Months			0
CO000074	DER001	Derbon / Technologies	CPC	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months			6
CO000077	PRN001	Pink Shoes	CPC	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months			4
CO000078	PRN001	Pink Shoes	CPC	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months			4
CO000080	OFF001	Office Supplies Unlimited	CPC	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months			2
CO000082	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months			7
CO000079	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months			4
CO000083	WES001	Westwood Dynamic	CPC	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months			8

## SELECT THE CONTRACT

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

ContractNo	CustomerC	CustomerName	ContractType	ContractTy	Location	OrderNo	StarDate	EndDate	Sales Depar	Period	BillingCycle	BillingPeriod	Bill
CO000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depar	60 Months	Months		3
CO000008	TSN001	Tsan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depar	60 Months	Months		4
CO000008	SAH001	Samantha Diner	CPC	Cost Per Co.	Main		06/07/2014	06/07/2019	Sales Depar	60 Months	Months		5
CO000008	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		26/07/2014	26/07/2019	Sales Depar	60 Months	Bi-annual		6
PC000001	DAR002	Dancing Shoes	PRE	Prepaid Con.	Kaarf	test	23/03/2016	23/03/2021	Sales Depar	60 Months	Months		1
CO000001	YES001	Young Electric	CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Depar	60 Months	Months		1
CO000004	PAH001	Panda Copiers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depar	60 Months	Months		5
CO000002	HCP001	Hape Works (Pty) Ltd	CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depar	60 Months	Months		7
CO000002	HCP001	Hape Works (Pty) Ltd	CPC	Cost Per Co.	Main		11/08/2016	07/09/2021	Sales Depar	60 Months	Quarterly		5
CO000002	HCP001	Hape Works (Pty) Ltd	PRE	Prepaid Con.	Durban Area		26/05/2017	26/05/2022	Sales Depar	60 Months	Months		3
CO000004	APP0001	Apple Juice Inc	CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depar	60 Months	Months		0
CO000002	HCP001	Hape Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar	60 Months	Months		2
CO000003	HCP001	Hape Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area	1234	26/05/2018	26/05/2023	Sales Depar	60 Months	Months		0
CO000004	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar	60 Months	Months		6
CO000007	PNH001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar	60 Months	Months		4
CO000008	PNH001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar	60 Months	Months		4
CO000008	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Durban Cen.	1234	06/05/2017	06/05/2020	Sales Depar	60 Months	Months		2
CO000002	HCP001	Hape Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		16/06/2019	16/06/2024	Sales Depar	60 Months	Months		7
CO000007	HCP001	Hape Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar	60 Months	Months		4
CO000003	WES001	Woodward Dynamic	CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar	60 Months	Months		8

- Click on the **Edit** button.

The **Contract Maintenance** screen will be displayed.

## SELECT THE ITEM

- Click on the **expand** button in the **row** of the **item** where you wish to edit the **item fee**.

Maintenance for Contract No.: CO000019 - Status: A - BPO: Version 2.1.0.46 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspaces

Process | Format

Links: Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	T
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-10204			Reception	674 Nightwish Ave, Forest ...	2100	8.00	
	Stone Castle Shopping Centre				Stone Castl...	Stone Castle	674 Nightwish Ave, Forest ...	2100	8.00	

Contract Info | Customer Info | Billing Info

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- The **Items** data grid will be expanded.
- The **Item Fees** frame usually opens first by default, if not, click on the **Item Fees** tab.

Maintenance for Contract No. : CO000019 - Status : A - BPO: Version 2.1.0.46 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

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## SELECT THE ITEM FEE

- Select the **field** in the **row** of the specific **Item Fee** that you wish to change.
  - In this example, **Charge Amount** in the row of the **Bank Rental Fee** has been selected.

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours
SP 2020	SP 2020 Sprint Colour Multi Functional Copier	SP 2020	2020-10204		Reception		674 Nightwish Ave, Forest ...	2100	8.00

Item Fees	Item Meters	Item Inclusions	Item Contacts
Marked	FeeType	FeeTypeDesc	ChargeAmount
<input type="checkbox"/>	E	Evergreen ...	0.00
<input type="checkbox"/>	L	Loan	0.00
<input checked="" type="checkbox"/>	R	Bank Rental	800.00
<input type="checkbox"/>	S	Service	0.00
<input type="checkbox"/>	I	Inhouse Re...	0.00
<input type="checkbox"/>	N	Insurance	0.00
<input type="checkbox"/>	REN	Standard R...	0.00
<input type="checkbox"/>	W	Renew Fee	0.00
			800.00

## EDIT ITEM FEE

- *Type in* or use the *arrow indicators* to make the changes as required.
  - In this example, the Item Fee has been *increased* to **R950**.

## SAVE ITEM FEE CHANGES

## SAVE THE CONTRACT

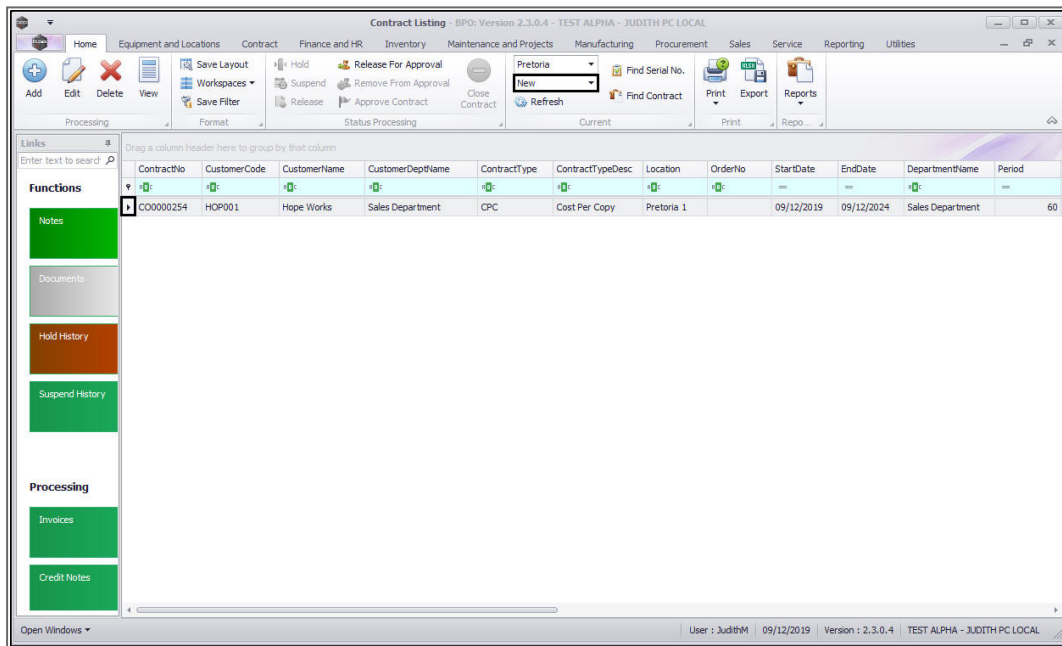
- When you are done, click on **Save**.

□

- 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.112.038

