

# CONTRACTS

## REMOVE ITEM FEES

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

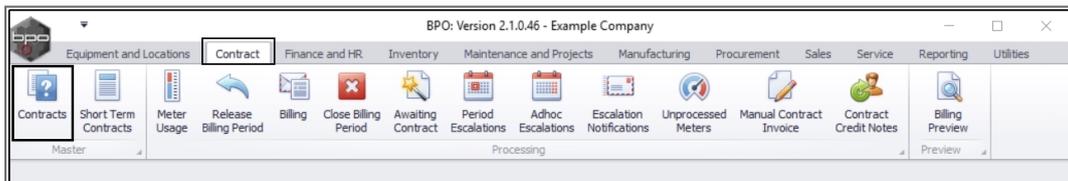
Certain amendments made to the contract **item fees**, will trigger the contract to be moved back to the **Released** state, in order for the contract to be checked and re-**Approved**. An email will then be sent to all users who have the rights to authorise this contract.

**Removing** an Item Fee will trigger the re-approval process.

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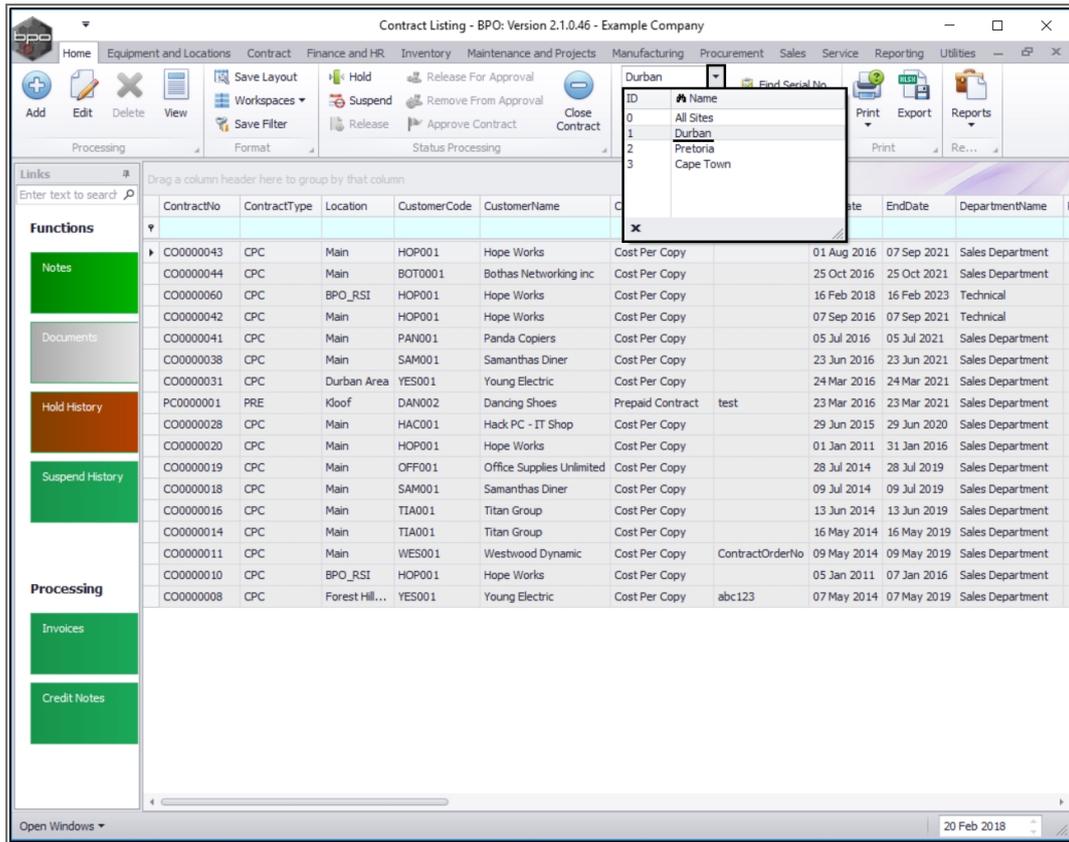
**Ribbon Access:** *Contract > Contracts*

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

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



- Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.
  - **Note:** You can **only** remove an item fee when the Contract is in the **Active** state.

Contract Listing - 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 Layout | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports  
 Workspaces | Suspend | Remove From Approval | Active | Find Contract | Refresh | Print | Re...

Processing | Format | Status Processing | Current

Links  
 Enter text to search

Functions  
 Notes  
 Documents  
 Hold History  
 Suspend History  
 Processing  
 Invoices  
 Credit Notes

ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentName
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Department
CO0000044	CPC	Main	BOT001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Department
CO0000060	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		16 Feb 2018	16 Feb 2023	Technical
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Department
CO0000038	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Department
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Department
PC0000001	PRE	Kloof	DAN002	Dancing Shoes	Prepaid Contract	test	23 Mar 2016	23 Mar 2021	Sales Department
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Department
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Department
CO0000019	CPC	Main	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Department
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Department
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Department
CO0000014	CPC	Main	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Department
CO0000011	CPC	Main	WES001	Westwood Dynamic	Cost Per Copy	ContractOrderNo	09 May 2014	09 May 2019	Sales Department
CO0000010	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		05 Jan 2011	07 Jan 2016	Sales Department
CO0000008	CPC	Forest Hill...	YES001	Young Electric	Cost Per Copy	abc123	07 May 2014	07 May 2019	Sales Department

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## SELECT THE CONTRACT

- Select the **row** of the **contract** where you wish to **remove** an **Item Fee**.
- Click on **Edit**.

Contract Listing - 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

Processing | Add | Edit | Delete | View | Save Layout | Workspaces | Save Filter | Format | Hold | Suspend | Release | Release For Approval | Remove From Approval | Approve Contract | Status Processing | Durban | Active | Find Serial No. | Find Contract | Refresh | Print | Export | Reports

Links: Enter text to search

Functions: Notes, Documents, Hold History, Suspend History, Processing: Invoices, Credit Notes

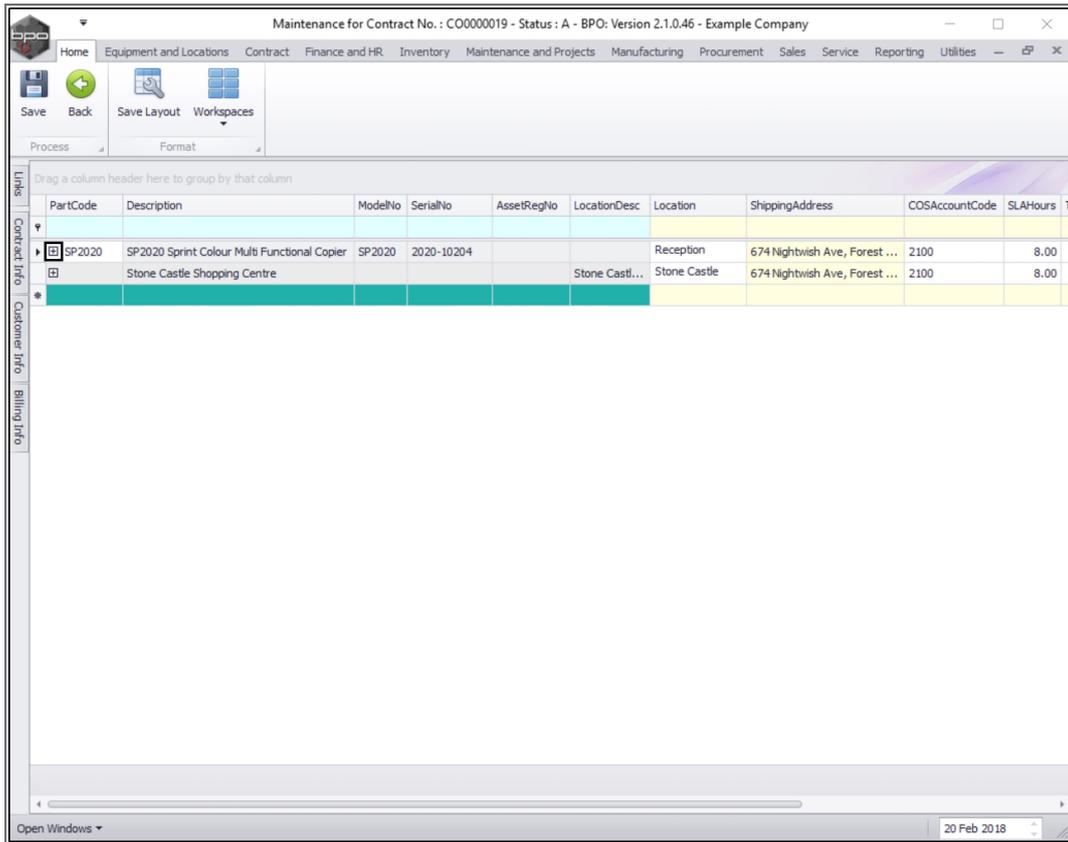
ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDesc	OrderNo	StartDate	EndDate	DepartmentName
CO0000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Department
CO0000044	CPC	Main	BOT001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Department
CO0000060	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		16 Feb 2018	16 Feb 2023	Technical
CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Department
CO0000038	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Department
CO0000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Department
PC0000001	PRE	Kloof	DAN002	Dancing Shoes	Prepaid Contract	test	23 Mar 2016	23 Mar 2021	Sales Department
CO0000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Department
CO0000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Department
CO0000019	CPC	Main	OFF001	Office Supplies Unlimited	Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Department
CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Department
CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Department
CO0000014	CPC	Main	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Department
CO0000011	CPC	Main	WES001	Westwood Dynamic	Cost Per Copy	ContractOrderNo	09 May 2014	09 May 2019	Sales Department
CO0000010	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		05 Jan 2011	07 Jan 2016	Sales Department
CO0000008	CPC	Forest Hill...	YES001	Young Electric	Cost Per Copy	abc123	07 May 2014	07 May 2019	Sales Department

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- The **Maintenance for Contract No.: [] - Status: []** 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**.



- The *Items* data grid will be expanded.

## SELECT THE ITEM FEE

- 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

Save Back Save Layout Workspaces

Process Format

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

Item Fees Item Meters Item Inclusions Item Contacts

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Escalatio
<input type="checkbox"/>	E	Evergreen ...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	L	Loan	0.00	1200			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input checked="" type="checkbox"/>	R	Bank Rental	800.00	1204			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	S	Service	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	I	Inhouse Re...	0.00	1201			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	N	Insurance	0.00	1203			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	REN	Standard R...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	W	Renew Fee	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
			800.00										

Stone Castle Shopping Centre Stone Castl... Stone Castle 674 Nightwish Ave, Forest ... 2100 8.00

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## REMOVE THE ITEM FEE

- **Un-tick** the **Marked** check box of the Item Fee that you wish to **remove** from billing.
  - In this image, **Bank Rental** has been selected.

The screenshot shows the 'Item Fees' table in the CO3 software. The table has the following columns: Marked, FeeType, FeeTypeDesc, ChargeAmount, AccountCode, COSAccountCode, InvoiceDescription, StartDate, EndDate, Period, PeriodType, BillingCycle, BillingPeriod, and Escalato. The 'Marked' column contains a checked checkbox for the 'Bank Rental' fee (AccountCode 1204, ChargeAmount 800.00). Other fees listed include Evergreen, Loan, Service, Inhouse Re..., Insurance, Standard R..., and Renew Fee.

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Escalato
<input type="checkbox"/>	E	Evergreen ...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	L	Loan	0.00	1200			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input checked="" type="checkbox"/>	R	Bank Rental	800.00	1204			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	S	Service	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	I	Inhouse Re...	0.00	1201			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	N	Insurance	0.00	1203			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	REN	Standard R...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	W	Renew Fee	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6

- The **Marked** check box will now be **blank**.

## SAVE ITEM FEE REMOVAL

- Click on **Save**.

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

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

Item Fees | Item Meters | Item Inclusions | Item Contacts

Marked	FeeType	FeeTypeDesc	ChargeAmount	AccountCode	COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Escalatio
<input type="checkbox"/>	E	Evergreen ...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	L	Loan	0.00	1200			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input checked="" type="checkbox"/>	R	Bank Rental	800.00	1204			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	S	Service	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	I	Inhouse Re...	0.00	1201			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	N	Insurance	0.00	1203			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	REN	Standard R...	0.00	1202			28 Jul 2014	28 Jul 2019	60	Months	Months		6
<input type="checkbox"/>	W	Renew Fee	0.00	1101			28 Jul 2014	28 Jul 2019	60	Months	Months		6
			800.00										

Contract	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	T
*	Stone Castle Shopping Centre				Stone Castl...	Stone Castle	674 Nightwish Ave, Forest ...	2100		8.00

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- The **Item Fee** will be **removed** and you will return to the **Contract Listing** screen.
- The Contract will have been moved into the **Released** status, ready for **re-Approval**.

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