

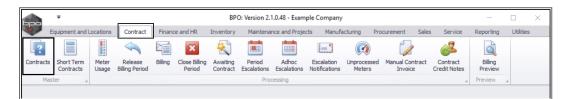
## CONTRACT

# ADD NEW LOCATION CONTRACT (PRE V2.3.0.0)

A <u>Customer Location</u> is required for a Customer Location Contract.

The 'location item' that is being added to the contract is a defined customer location.

Ribbon Access: Contract > Contracts



The *Contract Listing* screen will be displayed.

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



## Add New Location Contract (pre v2.3.0.0)

	Ŧ						Contract	Listing - BPO: V	/ersion 2.1.0.48 - Exam	nple (	Company			-	
	Home 8	Equipmen	nt and	l Loc	ations Contr	ract Finance a	nd HR Inver	ntory Maintena	ance and Projects Ma	nufac	turing Procurem	ient Sales Ser	vice Reportir	ng Utilities	_ & ×
Add	Edit Process	Delete sing	Vier	_	Image: Save Law       Image: Workspace       Image: Save Filt       Format	aces 🔻 🚟 S	elease	Release For Appr Remove From Ap Approve Contrac Itus Processing	close tt Contract	Durba ID 0 1 2	All Sites Durban Pretoria	Tind Serial No	Print Exp		s
Links			ц.							3	Cape Town				
Enter tex	xt to sear	ch	٩		ContractNo	ContractType	Location	CustomerCode	CustomerName				StartDate	EndDate	DepartmentNa
Funct	tions			ę						x					
Note					CO000008	CPC	Forest Hill		Young Electric		Cost Per Copy	abc123		07 May 2019	
Note	e5				CO0000010	CPC	BPO_RSI	HOP001	Hope Works		Cost Per Copy			07 Jan 2016	
					CO0000011	CPC	Main	WES001	Westwood Dynamic		Cost Per Copy	ContractOrderNo			
			5 I		CO0000014	CPC	Main	TIA001	Titan Group		Cost Per Copy				Sales Departme
Doci					CO0000016	CPC	Main	TIA001	Titan Group		Cost Per Copy			13 Jun 2019	Sales Departme
					CO0000018	CPC	Main	SAM001	Samanthas Diner		Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Departme
			- 1		CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimit		Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Departme
Hold	dHistory				CO0000020 CO0000028	CPC CPC	Main Main	HOP001 HAC001	Hope Works Hack PC - IT Shop		Cost Per Copy Cost Per Copy			31 Jan 2016 29 Jun 2020	Sales Departme
					PC0000001	PRE	Kloof	DAN002	Dancing Shoes		Prepaid Contract	test		29 Jun 2020 23 Mar 2021	Sales Departme
					CO0000031	CPC	Durban Area		Young Electric		Cost Per Copy	test			Sales Departme
Susp	pend Histo				CO0000031	CPC	Main	SAM001	Samanthas Diner		Cost Per Copy		23 Jun 2016	23 Jun 2021	
					CO0000041	CPC	Main	PAN001	Panda Copiers		Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Departme
			•		CO0000042	CPC	Main	HOP001	Hope Works		Cost Per Copy			07 Sep 2021	
					CO0000043	CPC	Main	HOP001	Hope Works		Cost Per Copy			07 Sep 2021	
					CO0000044	CPC	Main	BOT0001	Bothas Networking inc		Cost Per Copy		-	25 Oct 2021	
Proce	essing			1	CO000060	CPC	BPO_RSI	HOP001	Hope Works	c	Cost Per Copy		16 Feb 2018	16 Feb 2023	Technical
	pices dit Notes														
				4 0											•
Open Wi	indows 🕶													27 Feb 2	018 🗘 //

- By default, this screen will list all the *Active* contracts for the selected site.
- You do not need to change this status to create a new location contract.



## Add New Location Contract (pre v2.3.0.0)

	Ŧ						Contract	Listing - BPO: \	ersion 2.1.0.48 - Exampl	e Company			_	$\Box$ $\times$
	Home	Equipme	nt an	d Lo	ocations Con	tract Finance a	and HR Inver	ntory Maintena	ance and Projects Manu	facturing Procurem	ent Sales Ser	vice Reporti	ng Utilities	_ & ×
Add	Edit	Delete	Vie	ew	Save L Works Save F Forma	ilter	Suspend 🚜 Release 🏴	Release For App Remove From Ap Approve Contrac atus Processing	proval Close Act	tive 🔻	Find Serial No.	_	port Report	s
Links			ц.		rag a column be	ader here to grou	in by that colu							
			P		ContractNo	ContractType		CustomerCode	CustomerName	ContractTypeDesc	Orderble	StartDate	EndDate	DepartmentN
Funct	tions			ę		contractivpe	LOCAUUT	CustomerCode	Customername	contracti ypebesc	Ordenito	StartDate	LINUDATE	Deparumentus
runci	uons			È	CO000008	CPC	Forest Hill	YES001	Maura Electric	Cost Day Corry	abc123	07.00.001.0	0714 2010	Color Decemb
Note	es			ľ	CO0000010	CPC	BPO RSI	HOP001	Young Electric Hope Works	Cost Per Copy Cost Per Copy	aDC123		07 May 2019 07 Jan 2016	Sales Departr Sales Departr
					CO0000010	CPC	Main	WES001	Westwood Dynamic	Cost Per Copy	ContractOrderNo			Sales Depart
					CO0000011	CPC	Main	TIA001	Titan Group	Cost Per Copy	Contractor denvo		16 May 2019	
Doc	uments				CO0000014	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014		Sales Depart
					CO0000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Depart
					CO0000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimited			28 Jul 2014	28 Jul 2019	Sales Depart
Hold	History				CO000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Departr
noiu	i history				CO000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Departr
					PC0000001	PRE	Kloof	DAN002	Dancing Shoes	Prepaid Contract	test	23 Mar 2016	23 Mar 2021	Sales Depart
0					CO000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Departr
Susp	pend Hist	tory			CO000038	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Departr
					CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Depart
			-		CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
					CO000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Departr
					CO000044	CPC	Main	BOT0001	Bothas Networking inc	Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Departr
Proc	essing				CO000060	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		16 Feb 2018	16 Feb 2023	Technical
Invo	oices dit Notes	•												
				4										
	ndows 🔻												27 Feb 2	A

## **ADD NEW CONTRACT**

• Click on Add.



### Add New Location Contract (pre v2.3.0.0)

	Ŧ						Contract	Listing - BPO: V	ersion 2.1.0.48 - Exam	nple Company				$\square$ ×
	Home	Equipme	ent an	d Lo	cations Cont	ract Finance a	nd HR Inven	itory Maintena	nce and Projects Ma	anufacturing Procure	ement Sales Ser	vice Reportir	ng Utilities	_ & ×
Add	Edit Proces	Delete	Vie		Save La Worksp	aces 🔻 📅 S	Release	Release For Appr Remove From Ap Approve Contrac tus Processing	proval Close	Durban   Active  Refresh  Curreni	Find Serial No. Find Contract		port Reports	5
Links		sang	ņ		- 1	4			4	Curren		FILIC	A NEIN	4
LINKS			# 0											///
			<u>´</u>		ContractNo	ContractType	Location	CustomerCode	CustomerName	ContractTypeDes	c OrderNo	StartDate	EndDate	DepartmentNa
Func	tions			٩										
				۲	CO000008	CPC	Forest Hill	YES001	Young Electric	Cost Per Copy	abc123	07 May 2014	07 May 2019	Sales Departme
Note	es				CO0000010	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		05 Jan 2011	07 Jan 2016	Sales Departme
					CO000011	CPC	Main	WES001	Westwood Dynamic	Cost Per Copy	ContractOrderNo	09 May 2014	09 May 2019	Sales Departme
			_		CO000014	CPC	Main	TIA001	Titan Group	Cost Per Copy		16 May 2014	16 May 2019	Sales Departme
Doc					CO0000016	CPC	Main	TIA001	Titan Group	Cost Per Copy		13 Jun 2014	13 Jun 2019	Sales Departme
					CO000018	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		09 Jul 2014	09 Jul 2019	Sales Departme
					CO000019	CPC	BPO_TEL	OFF001	Office Supplies Unlimit	ited Cost Per Copy		28 Jul 2014	28 Jul 2019	Sales Departme
Hold	d History				CO000020	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Jan 2011	31 Jan 2016	Sales Departme
					CO000028	CPC	Main	HAC001	Hack PC - IT Shop	Cost Per Copy		29 Jun 2015	29 Jun 2020	Sales Departme
					PC000001	PRE	Kloof	DAN002	Dancing Shoes	Prepaid Contract	test	23 Mar 2016	23 Mar 2021	Sales Departme
Suc	pend Hist	tory			CO000031	CPC	Durban Area	YES001	Young Electric	Cost Per Copy		24 Mar 2016	24 Mar 2021	Sales Departme
503,	penurnisi				CO000038	CPC	Main	SAM001	Samanthas Diner	Cost Per Copy		23 Jun 2016	23 Jun 2021	Sales Departme
					CO0000041	CPC	Main	PAN001	Panda Copiers	Cost Per Copy		05 Jul 2016	05 Jul 2021	Sales Departme
			_		CO0000042	CPC	Main	HOP001	Hope Works	Cost Per Copy		07 Sep 2016	07 Sep 2021	Technical
					CO000043	CPC	Main	HOP001	Hope Works	Cost Per Copy		01 Aug 2016	07 Sep 2021	Sales Departme
					CO0000044	CPC	Main	BOT0001	Bothas Networking inc	nc Cost Per Copy		25 Oct 2016	25 Oct 2021	Sales Departme
Proc	essing				CO000060	CPC	BPO_RSI	HOP001	Hope Works	Cost Per Copy		16 Feb 2018	16 Feb 2023	Technical
	oices dit Notes													
				4	C									+
Open Wi	indows 🔻												27 Feb 2	)18 🗘 //.

- The *Add a new Contract* screen will be displayed.
- If the *Information panels* on the left of the screen are not already open and docked, click on the required tab to bring it to the fore and dock the panel.

#### **ADD CUSTOMER INFO**

• Click on the *Customer Info* tab.



		Ŧ					Add a r	new Contra	ct - BPO	Version 2.	1.0.48 - Examp	le Comp	any				-		$\times$
0	Р	lome E	quipment and	Locations	Contract	Finance a	ind HR I	nventory	Maintena	nce and Pro	ojects Manufa	acturing	Procurement	Sales	Service	Reportin	ng Utilities	- 1	8 X
Sa	ve Process	Back	Save Layout	•															
Links			neader here to		▲ that column												//		
ks	Part	tCode	Description	1			ModelNo	SerialNo	Ass	etRegNo	LocationDesc	Location	Sh	ippingAddi	ess	C	OSAccountCo	de SL/	Hours
Cus	9																		
tome	×																		
Customer Info																			
Contract Info Billing Info																			
ct Infi																			
8																			
illing																			
Info																			
	•																		Þ
Оре	en Wind	dows 🕶															27 Feb 2	2018	÷ 1

The *Customer Info* panel will be expanded.

• Note: *Dock* this panel to make it easier to work in.

Add the Customer information, ensure that all the required fields [\*]are filled in.

- **Customer:** Click on the search button and select the customer from the *Select a customer for this contract* pop up screen.
- Address: Click on the search button and select the address from the *Select an address for this contract* pop up screen.
- Order No: Type in the customer order number, if required.
- **Required:** Only select this check box if the client <u>must</u> supply an order number before a technician is sent on site.



• Location: Click on the drop-down arrow and select the customer location from the menu.

				Ado	d a new Contr	act - BPO: Version 2.1.0.48	- Example Comp	pany				- 0	×
Q	Home Ed	quipment and Location	ns Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	t Sales	Service	Reporting	Utilities —	₽ ×
P		2											
Sav	e Back	Save Layout Work	spaces										
P	ocess 🖌	Format	4										
Links	Customer Inf	0		車									
				* م	PartCode	Description		ModelNo	SerialNo	Asse	tRegNo	LocationDesc	Location
	Custo	ress			Ŷ								
	100			10	*								
				Ψ.									
	Orde	er No											
		ired 🗌											
	Loca	ation		•									
	Customer Info	o Contract Info	Billing Info		4								•
Ope	n Windows 🔻	_										27 Feb 2018	÷ //

#### ADD CONTRACT INFO

• When you have finished editing the customer info details, click on the *Contract Info* tab.



						A	dd a new Cor	tract - BPO: Versi	on 2.1.0.48 -	Example Com	npany			_		$\times$
0	Home	Equipme	ent and Location	ns Contract	Finan	ce and H	R Inventory	Maintenance ar	d Projects	Manufacturing	Procurement	t Sales S	Service Reporting	Utilities	-	₽ ×
			<u>e</u> r													
Sav	Back	Save	Layout Work	spaces												
Pr	ocess		Format	•												
	ustomer	Info	Tornac			ц										
Links							PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDe	sc Location	ShippingAd	decara	/ /
	Cu	stomer	Hope Works			* م	PartCode	Description	Modelivo	Serialivo	AssetRegNo	LocationDe	sc Location	ShippingA	aaress	
	A	ddress	Plot 91 Leaf R Forest Hills New Town Durban South 1234		Q	* *	•									
	0	rder No	Location 100													
		quired														
	Le	ocation	Hillcrest			• *										
	Customer I	Info	Contract Info	Billing Info												
0000				,										27 Feb 2	0.19	+ 
Oper	Windows													27 Feb 2	010	

The *Contract Info panel* will be expanded.

- **Contract No:** The contract number is generated by the system (where configured in the Contract Type setup).
- **Contract Type:** Click on the drop-down arrow and select the contract type e.g., Prepaid Contract.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- End Date: This will auto populate 5 years from the start date but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
- **Period:** Either type in or use the arrow indicators to select the period of the contract (life span of the contract).



- **Period Type:** Select the period type (measure relating to the lifespan), e.g., 60 <u>months</u>.
- **Department:** Click on the drop-down arrow and select the department.
- **Contract Manager:** Click on the drop-down arrow and select the contract manager.
- **Salesman:** Click on the drop-down arrow and select the salesman.
- Aggregate Billing: Click on this check box if the customer will receive aggregate billing.
- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.
  - Note: If this is an Evergreen contract, set your end date to 31/12/2999.

	Ŧ			Ad	d a new Contra	act - BPO: Versior	n 2.1.0.48 -	Example Con	npany				_		$\times$	-
Q	Home Equipm	nent and Location	ns Contract	Finance and HR	Inventory	Maintenance and	Projects	Manufacturing	p Procurement	t Sales	Service	Reporting	Utilities	-	8 x	£
		e Layout Work	spaces													
Links	Contract Info			ņ.												
0.	Contract No	D			PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDe	esc Lo	Location	Shipping/	ddress		
	Contract Type	2		•	•											
	Start Date	e 27 Feb 2018	-													
	End Date	e 27 Feb 2023	•													
	Period	d	0 🗘 *													
	Period Type	e		*												
	Department			*												
	Contract Manager			•												
	Salesman			•												
	Aggregate Billing															
	Hide Fee Detai	il 🗌														
	Customer Infe	Contract Info	Billing Info													
		Contract Into	Billing Into		•						_			_	_	k
Op	en Windows 🔻												27 Feb	2018	÷,	



#### **BILLING INFO**

• When you have finished editing the contract info details, click on the *Billing Info* tab.

					4	Add a	new Contra	act - BPO: Version 2.1.0.4	8 - Example Com	pany				- 0	]	$\times$
9		Equipme	ent and Locations	Contract	Finance and	HR	Inventory	Maintenance and Projects	Manufacturing	Procuremen	t Sales	Service	Reporting	Utilities -	- 8	×
			21													
Sav	e Back	Save	Layout Worksp	aces												
P	ocess 4		Format													
	Contract In	Fo.	Tornac	4	1											
Links	contract in					Dr		header here to group by the					-		/	
	Contra	act No				9	PartCode	Description		ModelNo	SerialNo	Ass	etRegNo	LocationDesc	Loca	tion
	Contract	Туре	Cost Per Copy		•	*										-
	Star	t Date	01 Jan 2018	-												
	End	d Date	31 Dec 2022	-												
		Period	60	÷ •												
	Period	l Type	Months		• *											
			Sales Departme	nt	- *											
	Co	ntract nager	Ben Johnson		- *											
	Sale	esman	Belinda Sharmar	ı	<b>*</b> *											
	Aggregate	Billing														
	Hide Fee	Detail														
	Customer In	fo (	Contract Info	Billing Info												
			conduct mild	Diming 1110		4	C									F
Ope	n Windows 🔻													27 Feb 201	8	

The *Billing Info panel* will be expanded.

Some of these details will auto populate but they can be changed as explained below:

- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- **Billing Period:** This is the financial period in which billing will first begin. Type in or use the arrow indicators to select the period number (e.g., January = 11).



- **Billing Day:** Type in the day that the customer will be billed (e.g., on the 25th of each billing cycle).
  - The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the Contract Billing screen. The Billing Day is limited to 31. You can type in the day that the customer will be billed (e.g., on the 25th of each billing cycle) else leave as 0.
- **Escalation Type:** Search for and Select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g., 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
  - Note: If this escalates on the anniversary of the contract, then use the same financial period as the billing period.
- **Currency:** The system will auto populate with the currency already set up on the customer but you can click on the drop-down arrow and select an alternative currency if required.
  - Note: For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g., type in the dollar amount if the currency is USD.
- **Exchange:** Type in the exchange rate.
- **Tax Rate:** Type in the tax rate.



	•	-			Ad	d a new Cont	act - BPO: Version 2.1.0.48	- Example Com	pany				- 0		×
9	Home	e Equip	ment and Locatio	ns Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	t Sales	Service	Reporting	Utilities –	8	×
	we Bac		ve Layout Work	spaces											
	Billing In	nfo			ġ.										
Links	Ri	illing Cyc			*	PartCode	Description		ModelNo	SerialNo	Asse	etRegNo	LocationDesc	Locatio	n
		ling Perio				<b>Υ</b>									
		- Billing Da				*									
	Escala	ation Typ	pe		-										
		tion Perio	•												
		lation An		.0000 ‡											
		Currenc	·		•										
			te 14.00 *												
	Custom	er Info	Contract Info	Billing Info		۰ C									÷
Ор	en Window	vs 🕶											27 Feb 201	3	11.

- When you have finished editing the Billing Info panel, you can hide (dock) the panel to make it easier to work in the *Items* frame.
- Click on the *docking icon* in the billing panel.



	h			Add	d a new Contr	act - BPO: Version 2.1.0.48	- Example Comp	pany				- 0	]	×
	Home Equipmer	nt and Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	: Sales	Service	Reporting	Utilities -	. 8	х
Sar	ve Back Save L	ayout Workspac	ies A											
Links	Billing Info			ф.										
	nillian Carda	Maatha		• *	PartCode	Description		ModelNo	SerialNo	Asse	tRegNo	LocationDesc	Locatio	n
	Billing Cycle Billing Period	12 🔹 *		• • •	9									
	Billing Period Billing Day	25 🗘			•									
	Escalation Type			• •										
	Escalation Period	12 🗘												
	Escalation Amt	10.000	0 🗘											
	Currency	South African Ran	nd	• *										
	Exchange	1.00 *												
	Tax Rate	14.00 *												
	Customer Info C	ontract Info Bi	lling Info		4									
Оре	en Windows 🔻				,							27 Feb 2018	в 🔅	1.

• The *Customer Info*, *Contract Info* and *Billing Info* panels will now be reduced to *tabs* at the side of the screen.

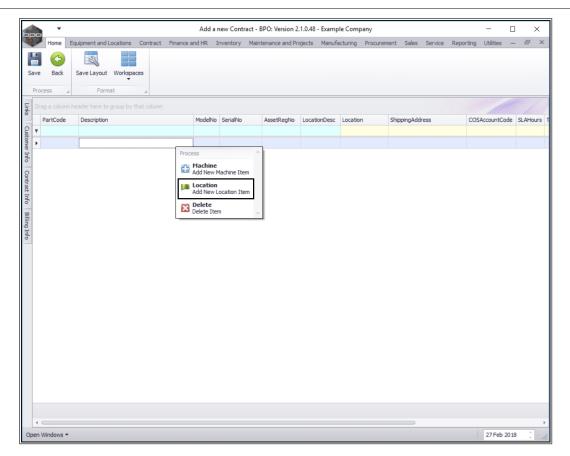


Norm         Egyptiment and Locations         Contract         Finance and HR         Inventory         Maintenance and Projects         Manufacturing         Procurement         Sales         Service         Reporting         Ublics         -         IP         X           Service         Base         Service         Barrier         Base         Service         Reporting         Ublics         -         IP         X           Very law calume         Format         Service         Barrier         Service         Barrier         Service         Service         Barrier         Service			Ŧ					Add a r	new Contra	ict - BPO: Ve	ersion 2.1.	).48 - Examp	le Compa	any				-		$\times$
Serve Back       Serve Layout Workspaces         Process       Format         Top as column header here is group by that column         PartCode       Description         ModelNo       SerialNo         AsserRagNo       LocationDesc       Location         SerialNo       AsserRagNo       LocationDesc       SerialNo         Image: SerialNo       ModelNo       SerialNo       AsserRagNo       LocationDesc       Location         SerialNo       SerialNo       AsserRagNo       LocationDesc       Location       ShippingAddress       COSAccountCode       Submit AsserRagNo         Owner Horizon       Image: SerialNo       AsserRagNo       LocationDesc       Location       ShippingAddress       COSAccountCode       Submit AsserRagNo         Owner Horizon       Image: SerialNo       AsserRagNo       LocationDesc       Location       SerialNo       Serianno       Serianno       Se	9		Home	Equipment and			Finance a	nd HR 🛛 I	nventory	Maintenance	e and Proje	cts Manufa	acturing	Procuremen	t Sales	Service	Reporti	ng Utilities	-	8 x
Process         Format           Image: column header here is group by that column         PartCode         Description         ModelNo         AsserRegNo         LocationDesc         Location         ShippingAddress         COSAccountCode         S.A.Hours           Image: column header here is group by that column         Image: column header here         Image: column header here         COSAccountCode         S.A.Hours	ľ		$\bigcirc$	2																
Orong a colume header here to group by that column           PartCode         Description         ModeNo         AsserRegNo         Location         ShippingAddress         COSAccountCode         SLAHours	Sa	ave	Back	Save Layout	t Workspa	aces														
PartCode       Description       ModeNo       SeriaNo       AsserRagNo       LocationDesc       Location       ShippingAddress       COSAccountCode       SLAHours         Image: Superscription       Image: Superscripion       Image: Superscrininternational super		Proce	ess "	For	mat	4														
PartCode       Description       ModeNo       SeriaNo       AsserRagNo       LocationDesc       Location       ShippingAddress       COSAccountCode       SLAHours         Image: Superscription       Image: Superscripion       Image: Superscrininternational super	Link																			
			artCode	Description	n			ModelNo	SerialNo	Asset	RegNo L	ocationDesc	Location	Sł	nippingAdd	ress	0	OSAccountCo	de SL	AHours
	Custo	-																		
	mer Ir	•																		
	fo																			
	Contra																			
	act Infi																			
	o B																			
	lling I																			
	nfo																			
	00		indows -															27 Feb 3	2018	-

## **ADD LOCATION**

- *Right click* anywhere in the *row* of the *Parts* frame.
- A *Process* menu will pop up.
- Click on *Location* Add New Location Item.





- The *Select an item location* pop up screen will appear.
- Select the *row* of the *item location description* that you wish to *add*.
- Click on Ok.



	Ŧ				Add a	new Cont	ract - B	PO: Version 2	2.1.0.48 - Examp	le Company				— [		×
V	Home	Equipment and Locations	Contra	act Finance a	ind HR	Inventory	Maint	enance and Pr	rojects Manufa	cturing Procu	rement Sales	Service	Reportir	ng Utilities	- 8	х
E Save	<b>Back</b>	Save Layout Worksp														
Proc	ess ,	Format	4													
Links																
	PartCode	Description			ModelNo	SerialNo		AssetRegNo	LocationDesc	Location	ShippingAddr	ess	C	OSAccountCode	SLAHo	urs
Cus 🕈																
I I															0	0.00
L     Customer Info     Contract Info     Billing Info																
2				Select an it	em locat	tion						x				
Cont				Home												
ract						20										
Info				Ok Back	-	Layout										
				OK DOCK	Jave	Layout										
lling				Process	Form	nat 🦼										
Info												/				
									WOAttachmer	nt GenTasks	WONotification	1.0-				
			•	FuncLocDescr	ption	Category	Class	Type	WOAttachmen	GenTasks	WONotification	ISCO				
			The second secon													
				First Floor		DEDEDE	DEDE		No	Yes	Yes	P				
				First Floor		DEDEDE	DEDE		No	Yes	Yes	1				
			Ľ	Forest Hills Ce Hope Farmers		DEDEDE	DEDE		Yes	Yes	Yes	f I				
				Jolly Farm Cer		DEDEDE	DEDE		No	Yes	Yes	P. O				
				Kloof Corner N		LCBUCS	LCBU		No	Yes	Yes	P				
				Kloof Corner M			LCBU		No	Yes	Yes	- N				
				Lilies Quarter			DEDE		No	Yes	Yes					
				NewHopeMall		DEDEDE	DEDE		No	No	No	N				
				NON CLIENT E			LCAR		No	No	No	N				
				Pine Willows C		DEDEDE	DEDE		No	Yes	Yes	N -				
			4									<b>F</b>				
4 0																)
Open V	Windows 🔻													27 Feb 20	18 🗘	

• The selected item location description will now populate the *Location Description* text box.



	<b>.</b>				A	dd a new	Contract - BPO: V	ersion 2.1.0.48	- Example Comp	any			- 🗆	$\times$
	Home	Equipment and Lo	ocations (	Contract	Finance and H	IR Inver	ntory Maintenanc	e and Projects	Manufacturing	Procurement	Sales Service	Reporting	Utilities —	₽ X
Save	Back	Save Layout	•	S										
Links														
8	PartCode	Description	ModelNo	SerialNo	AssetR	RegNo L	ocationDesc	Location	ShippingAddr	ess	COSAccountCod	E SLAHours	TravelRadius	TravelCh
Cust 9														
► *						F	orest Hills Centre					0.00	0	)
	 Windows ▼												27 Feb 2018	

- Click in the *Location* text box.
- Type in a *location* for this item.

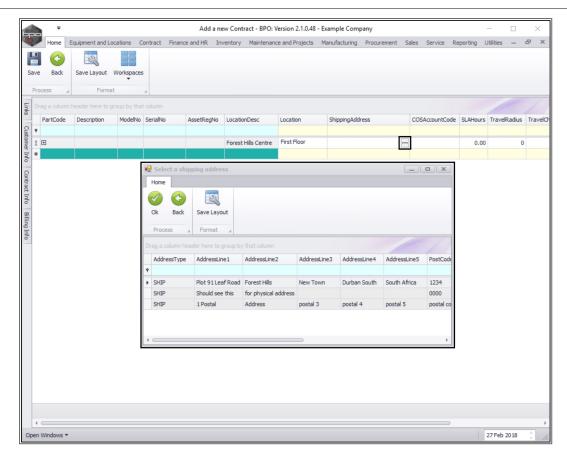


Pore         Experiment and Locations         Contract         France and HR         Immetry         Maintenance and Projects         Maintenance         Maintenance and Projects         Maintenance         Maintenance and Projects         Maintenance         Maintenance and Projects         Maintenance and Projects         Maintenance and Projects         Maintenance         Maintenance and Projects         Maintenance         Maintenance and Projects         Maintenance         Ma		- <b>-</b>				Д	Add a new	Contract - BPO:	Version 2.1.0.48	- Example Com	any			- 0	$\times$
Save Back         Save Lagout Workswees           Forces         Format             Dag a column header here to group by that column           WertSode         Description         ModelNo         SaveRing/No         LocationDesc         Location         ShippingAddress         COSAccountCode         LAHours         TraveRadus         TraveR           WertSode         Description         ModelNo         SaveRing/No         LocationDesc         Location         ShippingAddress         COSAccountCode         LAHours         TraveRadus         TraveR           WertSode         Description         ModelNo         SaveRing/No         LocationDesc         Location         ShippingAddress         COSAccountCode         LAHours         TraveRadus         TraveR           WertSode         Description         ModelNo         SaveRing/No         LocationDesc         Location         ShippingAddress         COSAccountCode         LAHours         TraveRadus         TraveR           WertSode         Description         ModelNo         SaveRing/No         LocationDesc         Location         ShippingAddress         COSAccount Code         LAHours         TraveR		Home	Equipment and Lo	cations (	Contract	Finance and H	HR Inve	ntory Maintenan	ce and Projects	Manufacturing	Procurement	Sales Service	Reporting	Utilities —	₽ X
		Back	Save Layout	Workspace	S										
	Links Dra														
	-	PartCode	Description	ModelNo	SerialNo	Asset	RegNo L	ocationDesc	Location	ShippingAdd	ress	COSAccountCod	SLAHours	TravelRadius	TravelC
	₽ Custo														
	mer I	Ŧ					F	Forest Hills Centre	First Floor	Ç.			0.00	) (	)

#### **SHIPPING ADDRESS**

- Click in the *Shipping Address* text box.
- An *ellipsis* button will be revealed.
- Click on this button to display the *Select a shipping address* pop up screen.





- Select the *row* of the *shipping address* that you wish to *link* to this *location item*.
- Click on Ok.



	Ŧ				Add a ne	w Contract - B	PO: Version	2.1.0.48 - Exa	ample Company				- 0	$\times$
0	Home	Equipment and Lo	cations C	ontract Fina	ance and HR In	ventory Maint	enance and l	Projects Ma	nufacturing Pro	ocurement Sa	ales Service	Reporting	Utilities —	₽ X
		21												
Save	Back	Save Layout	Workspaces											
Proc	2290	Format	•											
		header here to g		column										
5	PartCode	Description	ModelNo		AssetRegNo	LocationDesc	Locat	ion	ShippingAddress		COSAccountCod	le SLAHours	TravelRadius	TravelO
e e														
in I	÷					Forest Hills Cer	ntre First I	Floor				0.00	) (	5
r Info														
0				🖳 Select a	shipping addre	55					_ <b>D X</b>			
ontra				Home										
d Inf					5									
•					ack Save Layo	ut								
illin														
1 Info				Process	⊿ Format									
				AddressT	ype AddressLin	e1 Addres	sLine2	AddressLine	3 AddressLine	4 AddressLi	ine5 PostCode			
				9										
				SHIP		fRoad Forest		New Town	Durban Sou	th South Afr				
				SHIP	Should see 1 Postal	this for phy Addres	sical address	postal 3	postal 4	postal 5	0000 postal co			
				JILF	1 POStal	Addres	3	postaro	postal 4	postar 5	postarco			
				4				_			÷.			
4 (														,
Open \	Windows 🔻												27 Feb 2018	÷.

• *Scroll right* to view the remaining columns in the Items frame.

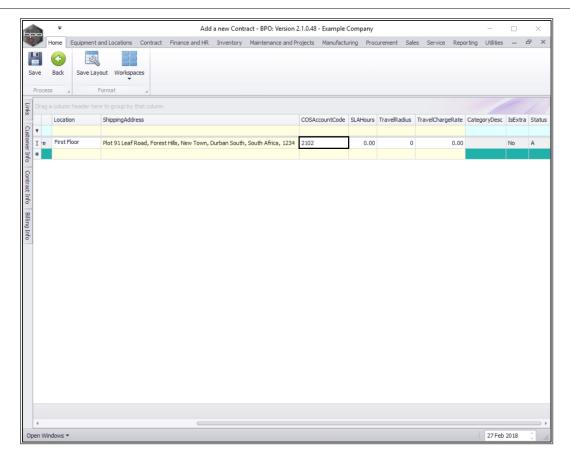


Image: Control of Contro			Ŧ				Ad	d a new C	ontract - BPO: \	/ersion 2.1.0.48	- Example Com	bany				_		$\times$
See Bod:       See Layout Workpace         Process       Pormat         Part Code       Description         Modelito       SerialNo         AssetRegNo       Location/Desc         Location       ShippingAddress       COSAcco         Bid       Forest Hills Centre       Pirst Floor         Rel 191 Leaf Read, Forest Hills, New Town, Durban South, South Africa, 1224       South Africa, 1224	0		Home	Equipment and Lo	cations C	Contract	Finance and HR	Invent	ory Maintenan	ce and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8 x
Drag a calume header here to group by that calum         PartCode         Description         ModeNo         SeriaNo         AssetRegNo         Location/Desc         Location         ShippingAddress         COSAcco           Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume header here to group by that calum         Image: Colume here         Image	Sar	ve	$\mathbf{}$	~		s												
Drag a colume header here to group by that column         AssetRegilo         Location/Desc         Location         ShippingAddress         COSAcco           Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column         Image: Column header here to group by that column here         Image: Column header here to group by that column here         Image: Column header here to group by that column here         Image:		Proces		Format	•													
	inks						AccotDo		rationDoor	Location	Chinoing & dd							COSAco
	2		I LCOUE	Description	MODEINO	Sendivo	ASSEURO	Egino Loi	LauonDesc	LOCAUUT	зпррпулии	C55						COSACC
	Iston							Ea	ract Hills Cantra	First Floor	Plot 01 Leaf	Dood Ecrect Hi	le New T	own Durk	an Couth Co	uth Africa	1224	
	ler Ir							10	rest mills centre		FIOU STLEAM	Rodu, Foreschi	IS, NEW I	own, Duru	an souur, su	uuranica	1254	
Open Windows * 27 Feb 2018 27 Feb 2018																		

## COS ACCOUNT CODE

- Click in the COS Account Code text box.
- Type in the *Cost of Sales account code* to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).

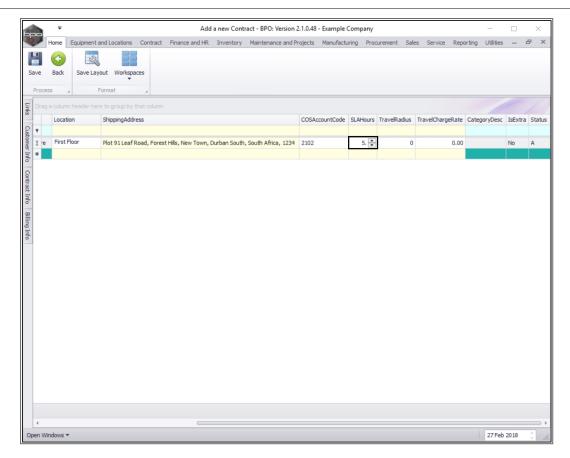




#### **SLA HOURS**

- Click in the *SLA Hours* text box.
- Type in or use the arrow indicators to select the required Call response time (in hours).

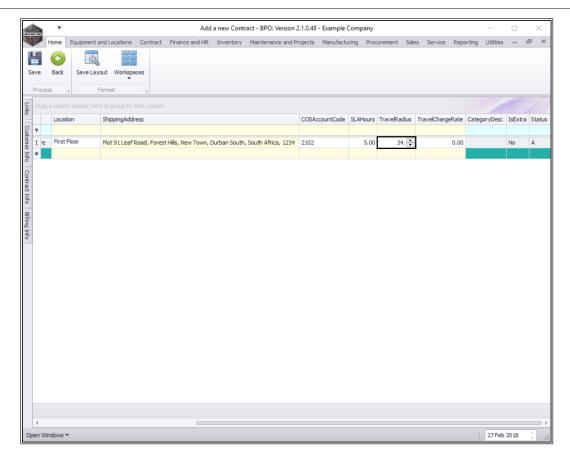




#### **TRAVEL RADIUS**

- Click in the *Travel Radius* text box.
- Type in or use the arrow indicators to select the distance (in kilometres) to and from the client, if this travel is to be billed every time a Call is logged. If travel is included, then set this to **O**.
  - Note: Travel can always be billed separately, if required.

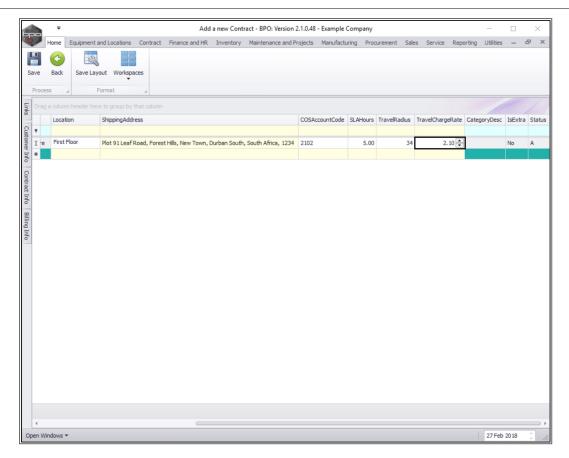




#### **TRAVEL CHARGE**

- Click in the *Travel Charge Rate* text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g., Rands per kilometre).



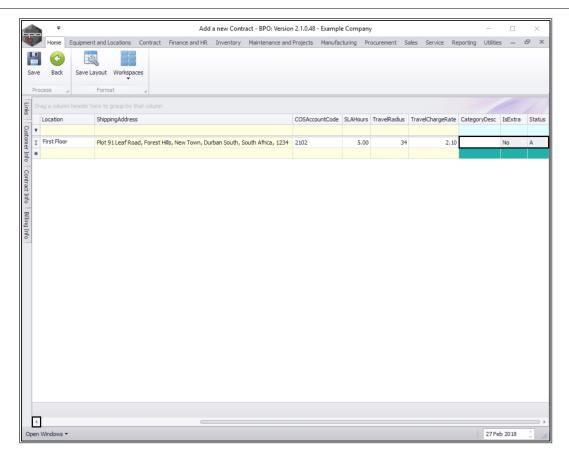


• The *Category Description*, *Is Extra* and *Status* fields are static.

## **ADD ITEMS**

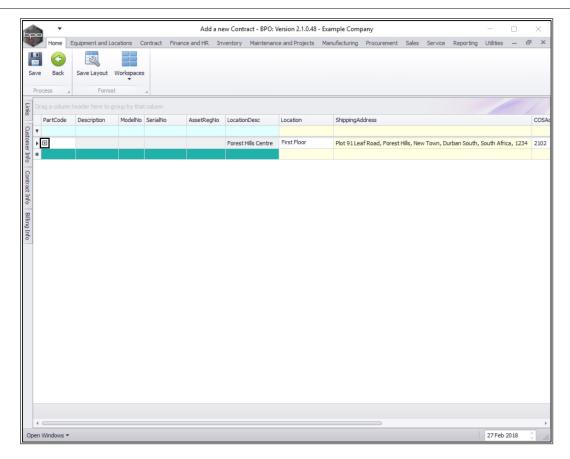
• Scroll left, so that you can view the Part Code column again.





• Click on the *expand* button in the *Part Code* text box.





- The selected location *Item* frame will be expanded.
- In this frame are **4** different tabs:
  - Item Fees: monthly charges
  - Item Meters: meter usage charges
  - Item Inclusions: items not to bill
  - Item Contacts: the contact person per location item



	me	Equip	ment and I	Locations Co	ntract Finance		w Contract - BPO: V entory Maintenanc				Sales	Service R	eporting U	Itilities —	8
	•		2J												
/e B	Back	Sav	ve Layout	Workspaces											
rocess			Form	at 🦼											
Parto	Code	De	scription	ModelNo	SerialNo /	AssetRegNo	LocationDesc	Location	ShippingAdd	fress					0
7															
• =							Forest Hills Centre	First Floor	Plot 91 Leaf	Road, Forest H	ills, New	Town, Durba	an South, Sou	uth Africa, 12	34 2
	Ite	m Fees	Item M	leters Item I	inclusions Item	Contacts									
ĽĎ	Q N	larked					COSAccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BillingCycle	BillingPeriod	Esca
	9														
	•		E	Evergreen	0.00	1202			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			L	Loan	0.00	1200			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			R	Bank Rental	0.00	1204			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			S	Service	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			I	Inhouse Re	0.00	1201			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			N	Insurance		1203			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
			REN	Standard R		1202			01 Jan 2018	31 Dec 2022		Months	Months	12	
			W	Renew Fee	0.00	1101			01 Jan 2018	31 Dec 2022	60	Months	Months	12	
					0.00										
1.6	4 ⊂														

Note: In the Items Frame, you will <u>not</u> be able to add *Item Meters* as this is a <u>Location</u> Contract not a Machine Contract and you cannot link meters to a location.



	Ŧ				Add	a new Cont	ract - BPO: V	ersion 2.1.0.48 - Exa	ample Compa	ny			- 🗆	$\times$
	Home	Equipment and Lo		Contract F	Finance and HR	Inventory	Maintenance	e and Projects Ma	nufacturing f	Procurement S	Sales Service	Reporting	Utilities —	₽ X
		2												
Save	Back	Save Layout	Workspace	25										
Pror	cess	Forma	at											
등 Dra		nn header here to g												
15	PartCode			o SerialNo	AssetRegN	No Locatio	onDesc	Location	ShippingAddr	ress				COSAc
<b>♀</b>														
omer I						_	Hills Centre	First Floor	Plot 91 Leaf	Road, Forest Hill	s, New Town, D	urban South, S	outh Africa, 12	.34 2102
Links Customer Info Contract Info Billing Info		em Fees Item Me Narked Mete	_	m Inclusions StartReading		_	MinQuant	tity AccountCode	COSAccou	EscalationP	EscalationT	EscalationA	. SupplierCode	2 Supplier
Contr	۴		$\checkmark$											
act In	•	•									Select esc t			
б в *														
Silling														
Info														
4.0	Windows •												27 Feb 2018	<b>۰</b>

- To add Location Item Fees, Location Item Inclusions and Location Item Contacts, click on the following link and follow the processes as set out in the Contracts - Create A New Contract manual.
- You can continue to add contract location items as required, however additional items can also be added later.

## **SAVE LOCATION CONTRACT**

When you are finished, click on *Save*.



		Ŧ				Add	l a new Contra	act - BP	O: Version 2.1.0.48	- Example Comp	any				-		$\times$
9	н	lome	Equipment and Lo	cations C	ontract	Finance and HR	Inventory	Mainte	enance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ X
		$\bigcirc$	2														
Sa	ve	Back	Save Layout	Workspaces													
1	Process	s "	Format														
Link																	/
S		tCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc		Location	ShippingAddress						C	OSAccount
Custon	۲ ► ±						Forest Hills Ce	otro	First Floor	Plot 91 Leaf Roa	d Ecrest Hills	New Tow	n Durban	South South	Africa 17	24 2	102
	*						Forest mills Ce	aue		FIOT 91 LEar Roa	u, Porest Hills,	New IOW	n, Durban	30001, 30001	anca, 12	77 21	1012 1
0																	
ontrac																	
t Info																	
B																	
ing In																	
6																	
	<b>ا</b>																Þ
Ор	en Wine	dows 🕶													27 Feb 2	018	÷ //.

- The new contract can be found within the *New* contract status.
- From here the contract will need to be **Released** and **Approved** before it becomes active.

MNU.112.041