

CONTRACT

PERIOD ESCALATIONS

Period Escalations are run on a monthly basis during the month end billing run.

Escalation period and amount is determined by the contract item fee / meter setup details.

You will run escalations for the **upcoming** month, at the **end** of the current month.

Ribbon Select Contract > Period Escalations



The *Period Escalation Processing* screen will be displayed.

Upon opening, this processing screen displays a list of contract billing periods with processing and count columns for Fee and Meter charges.

VIEW FEES AND METERS

Fees and Meters will be marked as follows:

- 1. Green Financial Months that have been processed.
- 2. Yellow Available Financial Month yet to process.
- 3. **Red** Unprocessed Financial Months that cannot be processed yet.



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- The No Fee Items column will show you the number of contract item fees that are to be escalated in the relevant billing period.
- The No Meter Items column will show you the number of contract item meters that are to be escalated in the relevant billing period.





FEE PROCESSING

 Double click on the *available* processing period for *Fee Processed* (i.e. the yellow No text box in the *Fee Processed* column).

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The 'Period Escalations' for Fees screen

The *Period Escalations* (for fees) screen will be displayed. This screen is divided into **4** frames:

- 1. Contract Types to be escalated.
- 2. Fee Types to be escalated.
- 3. Contracts to be escalated.
- 4. **Contract Items Charges** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.



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User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

Contract *Class* and *Category*, as <u>defined on the contract</u>, can be useful when filtering for contracts that you need to escalate.

¹ BPO2 v2.5.0.8 or higher. "Add Interest Rate " on page 2



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Mark Items to be Escalated

You can use the *Marked* check boxes to select the *Contract Types*, *Fee Types*, *Contracts* and *Contracts Items* that you wish

to escalate.

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• Each contract item meter charge will be listed individually, as follows:



- Item Fee (IFEE)
- Item Fee Back to Back (FBTB)

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In the Linked Contract Item Charges Listing frame, look at the *Amount*, *Increase* and *New Amount* columns.

- Amount: This is the amount of the fee that is being charged.
- Increase: This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a *Percentage* or a *Flat Amount*).
 - In this image, the amount already set up on the system is a 10% escalation.
- New Amount: This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

Review these amounts to make sure they are correct, individual changes to the *Increase* amount can be made if required.



Period Escalations

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v	W	Renew Fee						1	No	Service	IFEE	CO0000018	Samanthas Diner	512,701	51.270	563.971	Cost Per Copy	SAM001
	I	Inhouse Rental						1	No	Insurance	IFEE	CO000018	Samanthas Diner	356.109	35.611	391.720	Cost Per Copy	SAM001
	N	Insurance						1	No	Insurance	IFEE	CO0000018	Samanthas Diner	356,109	35.611	391.720	Cost Per Copy	SAM001
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SAVE FEE ESCALATIONS

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en Windo	vs 🕶													Lie	er : Bianca	21/02/2023	/ersion : 2.5.1.4 F	xample Company

• Click on *Save*.

1. A *Run Period Escalations* message will pop asking you;

• Are you sure you want to process this escalation?

2. Click on Yes.



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- 1. You will return to the *Period Escalations Processing* screen.
- 2. The *Fee Processed* colour will change from yellow to *green* for the processed period.

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Onen Window													U	1 Marcine - D 5 4 4 5	and Comment



METER PROCESSING

- 1. In the *Period Escalation Processing* screen,
- 2. Double click on the *available* processing period for *Meter Processed*

(i.e. the yellow No text box in the *Meter Processed* column).

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Open Win	idows *													User : Bianca	21/02/2023	Version : 2.5.1.4	Example Com	any

The 'Period Escalations' for Meters screen

The *Period Escalations* (for meters) screen will be displayed. This screen is divided into **4** frames:

- 1. Contract Types to be escalated
- 2. Fee Types to be escalated
- 3. Contracts to be escalated
- 4. **Contract Items** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.



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 You can use the *Marked* check boxes to select the Contract Types, Fee Types, Contracts, Contracts Items that you wish to escalate.

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- Each contract item meter charge will be listed individually, as follows:
 - Item Meter Minimum Billing (IMTR)
 - Item Meter Cost per Copy (MTCH)

Help v2.5.0.14 - Pg 10 - Printed: 25/06/2024



- Item Meter Back to Back Minimum Billing (MBTB)
- Item Meter Back to Back Cost per Copy (CBTB)
- Item Aggregate Meter Minimum Billing (AMTR)
- Item Aggregate Meter Cost per Copy (AMCH)

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In the Linked Contract Item Charges Listing frame, look at the *Amount*, *Increase* and *New Amount* columns.

- Amount: This is the amount of the fee that is being charged.
- **Increase:** This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a *Percentage* or a *Flat Amount*).
 - In this image, the amount already set up on the system is a 10% escalation.
- New Amount: This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

Review these amounts to make sure they are correct, individual changes to the *Increase* amount can be made if required.



Period Escalations

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Save Meter Escalations

• Click on *Save*.

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1. A *Run Period Escalations* message will pop asking you;

• Are you sure you want to process this escalation?

2. Click on Yes.



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- The *Meter Processed* colour will change from *yellow* to *green* for the processed period.
- Period Escalation processing for the upcoming month will now be complete.
- Click on **Back** to exit this screen.

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IMPORTANT NOTES

CLOSING OFF AN ESCALATION WITHOUT ESCALATING CONTRACTS

• In the *Period Escalation* screen, click on *Close* if you want to close off a fee/meter escalation *without* escalating your contracts.

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								M	No	Service	IFEE	00000077	Pink Shoes	605.000	60.500	665.500	Cost Per Copy	PIN0001
								V	No	Service	IFEE	CO0000078	Pink Shoes	242.000	24.200	266.200	Cost Per Copy	PIN0001
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- 1. An *Escalation Processing* message will pop up asking you;
 - Are you sure you want to close the period and not perform the escalations? This action will uncheck all the items.
- 2. Click on Yes.



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								V	No	Aggregate Me	AMTR	CO000079	Hope Works (Pty) Ltd	0.000	0.000	0.000	Cost Per Copy	HOP001
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4						•		×	No	Meter Min Billing	IMTR	CO0000018	Samanthas Diner	0.000	0.000	0.000	Cost Per Copy	SAM001
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												0000018	Samanthas Diner	234,910	23,491	258.401	Cost Per Copy	SAM001
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1. All the contract items to be escalated will be **un**checked.

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Save Unescalated Contracts

1. Click on *Save*.



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						No	Appregate Me	AMTR	CO000077	Pink Shoes	0.000	0.000	0.000	Cost Per Copy	PIN0001
4						No	Meter Min Billing	IMTR	CO0000018	Samanthas Diner	0.000	0.000	0.000	Cost Per Copy	SAM001
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1. A *Run Period Escalations* message will pop up asking you;

° Are you sure you want to process this escalation?

2. Click on Yes.

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- 1. An *Input validation* message will pop up asking you;
 - No contract items are selected. Are you sure you want to close this escalation period with no escalations applied?
- 2. Click on Yes.



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									-	No	Appregate Me	AMTR	CO0000079	Hope Works (Ptv) Ltd	0.000	0.000	0.000	Cost Per Copy	HOP001
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							- 7	this	escalati	on period with no esca	lations applied?	to close	000079	Hope Works (Pty) Ltd	0.000	0.000	0.000	Cost Per Copy	HOP001
													000018	Samanthas Diner	234.910	23.491	258.401	Cost Per Copy	SAM001
													000018	Samanthas Diner	264.274	26.427	290.701	Cost Per Copy	SAM001
										I	Yes	No	000018	Samanthas Diner	14.682	1.468	16.150	Cost Per Copy	SAM001
										No	Mono meter 5	MTCH	CO0000018	Samanthas Diner	18.597	1.860	20.457	Cost Per Copy	SAM001
Contracts to be en	escalated									No	Colour Meter 0	MTCH	CO000077	Pink Shoes	70.000	7.000	77.000	Cost Per Copy	PIN0001
and a column be	eader here to or	roup by that column								No	Mono meter 0	MTCH	CO000078	Pink Shoes	42.350	4.235	46.585	Cost Per Copy	PIN0001
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- 1. You will return to the *Periodic Escalation Processing* screen.
- The *Fee/Meter Processed* colour will change to *green* for the processed period.
 - In this image, the *Fee processed* changed colour to *green*.

â v						Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company	- 8 ×						
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May		2022 Yes	No		4								
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August		2022 10	Pio No		8								
October		2022 10	No		5								
November		2022 10	No		1								
December		2022 No	No		0								
January		2023 No	No		2								
February		2023 No	No		1								
Open Window	NS Y					User : Bianca 21/02/2023 Version	: 2.5.1.4 Example Company						

NO FEES OR METERS TO PROCESS

If the period you are processing has **no** fees and or meter to process;



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April	2022	Yes	Yes		1	0									
May	2022	Yes	Yes		4	3									
June	2022	Yes	Yes	~	3	9									
August	2022	no tio	THO INC		8	6									
Sentember	2022	No	No		1	0									
October	2022	No	No		5	6									
November	2022	No	No		1	0									
December	2022	No	No		0	0									
January	2023	No	No		2	1									
February	2023	No	No		5	5									
Open Windows	×												User : Bianca 21/02,	2023 Version : 2.5.1.4	Example Company

- 1. an *Escalation Processing* message box will pop up asking;
 - No items exist to be escalated. Do you wish to close this escalation period type?
- 2. Click on Yes.

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 July 	203	12 No	No		0	10									
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