

CONTRACT

ADHOC ESCALATIONS

Adhoc escalations can be run at any time of the year, across all or selected contracts, regardless of the contract escalation period / amount.

Ribbon Select *Contract > Period Escalations*



ADHOC ESCALATIONS SCREEN OVERVIEW

The *Adhoc Escalations* screen will be displayed, listing all *Active* contracts. 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.

- The *check boxes* are all *marked* when you first open the Adhoc Escalations screen.
 - This means that *all* the contract types and fees will be affected by any adhoc escalation changes that are made in this screen.

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

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)

You can make individual changes to the *Increase* amount, but when an escalation across multiple charges is required, then apply an escalation percentage across all marked items, as noted next.

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	æ.	I	Inhouse Rental						1	No	C00000077	AMCH	Cost Per Copy	Aggregate Mono meter 0	82.688	4.134	86.82	2 PIN0001	Pink Shoes
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		R S	Bank Rental Service						1	Yes	C00000081	AMTR		Aggregate Meter Min Billing	0.000	0.000	0.00	TIA001	Titan Group
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Marke			ContractTvp	CustomerName	CustomerCod		0.1		1	No	CO0000019	CBTB	Cost Per Copy	BTOB - Mono meter 0	6.655			OFF001	Office Supplies U
	a 2	ContractNo	Contracti yp	 Customerrvame ID: 	CustomerCoo	e Class	Cat		1	No	C00000072	CBTB	Cost Per Copy	BTOB - Mono meter 2500	10.000			HOP001	Hope Works (Pt)
-			Prepaid Contr		TIA001	Class3			1	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.025		5 TIA001	Titan Group
		CO0000012	Rental Contra		TIA001	Class1	-		1	No	C00000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-146.410	-1.610.51	TT4001	Titan Group
		CO0000018		Samanthas Diner	SAM001	Class 1			1	No	CO0000019	FBTB	Cost Per Copy	BTOB - Bank Rental	423.500	42.350		OFF001	Office Supplies
	~	CO0000019	Cost Per Copy	Office Supplies Unlimi	ted OFF001	Class2			1	No	C00000074	FBTB	Cost Per Copy	BTOB - Service	275.000	27,500		DER001	Derton / Techno
	•	CO000022	Cost Per Copy	Samanthas Diner	SAM001				1	No	C00000074	FBTB	Cost Per Copy	BTOB - Insurance	500.000			DER001	Derton / Techno
		CO000031	Cost Per Copy	Young Electric	YES001	Class3	1		1	No	C00000016	FBTB	Rental Contracts	BTOB - Insurance	300.000			0 TIA001	Titan Group
		CO0000043		Hope Works (Pty) Ltd	HOP001				1	No	C00000018	IFEE	Prepaid Contract	Service	1.691.036		1.860.13		Titan Group
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											108 of 108				27,130.29	2,503.68	29,663.19		,
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ESCALATION PERCENTAGE

You can use this process to apply a percentage amount across **all** of the **selected** Contract Types, Fee types and Contract Item Charge lines.

• Click in the *Escalation Period* field and either type in or use the arrow indicators to select the percentage that you wish to escalate by.



Adhoc Escalations

· .	United locations United locations<																		
	Ho	me Equipme	ent / Locations	Contract Finance / HR	Inventory Ma	intenance / P	rojects Manuf	acturing	Pr	ocureme	ent Sales Servi	ce Reporting	Utili	ties					- 8
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Contra	cts to be	escalated									No	CO000079	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HOP001
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Mar	ed	ContractNo	ContractTypeDes	c CustomerName	CustomerCode	Class	Category			\checkmark	No	CO0000019	CBTB	Cost Per Copy	BTOB - Mono meter 0	6.655	0.666	7.321	OFF001
7	2	(D)	100	1 0 :	* D :	100	10:	•		\checkmark	No	CO000072	CBTB	Cost Per Copy	BTOB - Mono meter 2500	10.000	1.000	11.000	HOP001
	~	CO0000012	Prepaid Contract	Titan Group	TIA001	Class3	Category 1			\checkmark	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.025	0.525	TIA001
		CO0000016	Rental Contracts	Titan Group	TIA001	Class1	Category2			\checkmark	No	CO0000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-146.410	-1,610.510	TIA001
						Class 1	Category3			\checkmark	No	CO0000019	FBTB	Cost Per Copy	BTOB - Bank Rental	423.500	42.350	465.850	OFF001
						Class2	Category3			\checkmark	No	CO000074	FBTB	Cost Per Copy	BTOB - Service	275.000	27.500	302.500	DER001
										1	No	CO000074	FBTB	Cost Per Copy	BTOB - Insurance	500.000	50.000	550.000	DER001
-						Class3	Category1			V	No	CO0000016	FBTB	Rental Contracts	BTOB - Insurance	300.000	15.000	315.000	TIA001
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			0.00.0	the second designed	1100001			- ÷				108 of 108				27,130.29	2,503.68	29,663.19	
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• When you have selected the escalation amount, click on the *Apply* button.

	÷						Adhoc E	calations	5 - B	PO: Vers	sion 2.5.1.4 - Example	e Company						-	. 2
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		REN	Standard Rentals					•		\checkmark	No	CO000080	AMCH	Cost Per Copy	Aggregate Mono meter 0	60.500	6.050	66.550	OFF001
		W	Renew Fee							1	No	CO000079	AMCH	Cost Per Copy	Appreciate Mono meter 0	78,750	3.938	82.688	HOP001
		I								1	No	CO000077	AMCH	Cost Per Copy	Appregate Mono meter 0	82,688	4,134	86.822	PIN0001
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						Class1	Category1							and a copy					
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- An *Escalation Processing* message box will pop up asking;
 - The Escalation percentage of [] will be applied to all
 - the selected items. Do you still want to proceed?
- Click on Yes.



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-	H	ome Equipme	ent / Locations Cor	ntract Finance / HR II	nventory M	aintenance / Pro	ojects Manufacturi	ng	Procurent	ient Sales Servio	ce Reporting	Utili	ties					- 8
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7								•	\checkmark	No	CO0000072	CBTB	Cost Per Copy	BTOB - Mono meter 2500	10.000	1.000	11.000	HOP001
Þ	-	C00000012	Prepaid Contract	Titan Group	TTA001	Class3	Category 1		\checkmark	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.025	0.525	TIA001
									×	No	C00000012	FBTB	Prepaid Contract	BTOB - Service	-1.464.100	-146.410	-1.610.510	TIA001
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		CO0000019	Cost Per Copy	Office Supplies Unlimited	OFF001	Class2	Category3			No	00000074	FRTR		RTOR - Service	275.000		302,500	DER001
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			0.10.0	the second description of	1100001						108 of 108				27,130.29	2,503.68	29,663.19	

• Review the *Amount*, *Increase* and *New Amount* columns.

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ee Types to be	escalated							•	1	Yes	CO000081	AMCH	Cost Per Copy	Aggregate Mono meter 0	52.500	7.875	60.375	TIA001
Marked	Code	CodeDescription						1	1	Yes	CO000081	AMCH	Cost Per Copy	Aggregate Colour Meter 0	105.000	15.750	120.750	TIA001
	REN	Standard Rentals					-		1	No	CO000080	AMCH	Cost Per Copy	Aggregate Mono meter 0	60.500	9.075	69.575	OFF001
	W	Renew Fee							1	No	CO0000079	AMCH	Cost Per Copy	Aggregate Mono meter 0	78.750	11.813	90.563	HOPOD
	I	Inhouse Rental							V	No	CO0000077	AMCH	Cost Per Copy	Aggregate Mono meter 0	82.688	12.403	95.091	PIN000
	N	Insurance					_		1	No	CO000080	AMTR	Cost Per Copy	Appregate Meter Min Billing	0.000	0.000	0.000	OFF001
~	R	Bank Rental Service							1	Yes	CO000081	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	TIA001
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	C00000012	Prepaid Contract	Titan Group	TIA001	Class3	Category1			1	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.075	0.575	TIA001
	CO0000016	Rental Contracts	Titan Group	TIA001	Class 1	Category2			1	No	CO0000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-219.615	-1,683.715	TIA001
	CO000018	Cost Per Copy	Samanthas Diner	SAM001	Class 1	Category3	-		V	No	CO0000019	FBTB	Cost Per Copy	BTOB - Bank Rental	423.500	63.525	487.025	OFF001
	CO000019	Cost Per Copy	Office Supplies Unlimited	OFF001	Class2	Category3			1	No	CO0000074	FBTB	Cost Per Copy	BTOB - Service	275.000	41.250	316.250	DER001
	CO000022	Cost Per Copy	Samanthas Diner	SAM001					1	No	CO000074	FBTB	Cost Per Copy	BTOB - Insurance	500.000	75.000	575.000	DER001
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~	C00000044	Cost Per Copy	Hope Works (Pty) Ltd	HOP001	Class3	Category1				No	CO0000018	IFEE	Cost Per Copy	Service	1,468,189			-
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		0.10.0	the second description of	1100001							108 of 108				27,130.29	4,069.54	31,199.84	

• You will see that the **15%** increase has been applied.

SAVE ADHOC ESCALATIONS

- When you have finished making the adhoc escalation rate changes, click on *Save*.
- Note that only *marked* items will be escalated.



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4		Home Equips	ent / Locations C	ontract Finance / HR I	nventory Mai	intenance / P	rojects Manuf	acturing	Procu	urement	Sales Servio	ce Reporting	Utili	ties					- 8
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M	rked	Code	CodeDescription Standard Rentals							V Te		C0000081	AMCH	Cost Per Copy Cost Per Copy	Aggregate Colour Meter 0 Aggregate Mono meter 0	60.500	9.075		OFF001
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		N	Insurance							V No		CO0000077	AMCH		Aggregate Mono meter 0	82.688	12.403		PIN0001
F		R	Bank Rental							V No		CO000080	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000		OFF001
		s	Service					-		V Ye		CO000081	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000		TIA001
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м	rked	ContractNo	ContractTypeDesc	CustomerName	CustomerCode	Class	Category		5	V No	0	CO0000019	CBTB	Cost Per Copy	BTOB - Mono meter 0	6.655	0.998	7.653	OFF001
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		CO0000012	Prepaid Contract	Titan Group	TIA001	Class3	Category1		5	V No	0	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.075	0.575	TIA001
Г		CO0000016	Rental Contracts	Titan Group	TIA001	Class 1	Category2		5	V No	0	CO0000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-219.615	-1,683.715	TIA001
F		CO0000018	Cost Per Copy	Samanthas Diner	SAM001	Class1	Category3	1	5	V No	D	CO0000019	FBTB	Cost Per Copy	BTOB - Bank Rental	423.500	63.525	487.025	OFF001
Г		CO0000019	Cost Per Copy	Office Supplies Unlimited	OFF001	Class2	Category3	1	1		n	CO0000074	FETE	Cost Per Copy	BTOB - Service	275.000	41.250	316.250	DER001
		CO000022	Cost Per Copy	Samanthas Diner	SAM001					V No		CO0000074	FBTB	Cost Per Copy	BTOB - Insurance	500.000	75.000		DER001
L		CO000031	Cost Per Copy	Young Electric	YES001	Class3	Category1			V No		CO0000016	FBTB	Rental Contracts	BTOB - Insurance	300.000	45.000		TIA001
-		CO0000043	Cost Per Copy	Hope Works (Pty) Ltd	HOP001		_			V No		C00000018	IFEE	Prepaid Contract	Service	1,691.036	253.655		
-	2	CO0000044	Cost Per Copy	Bothas Networking inc	BOT0001	ch	0.1	-		V No							253.655		
H	~	CO0000072 CO0000074	Cost Per Copy Cost Per Copy	Hope Works (Pty) Ltd Derton / Technologies	HOP001 DER001	Class3	Category1	-				CO0000018	IFEE	Cost Per Copy	Service	1,468.189			
H	- ×	C00000074	Cost Per Copy	Pink Shoes	PIN0001	Class2	Category3			V No		CO0000018	IFEE	Cost Per Copy	Service	1,076.671	161.501	1,238.172	
H	~	CO0000078	Cost Per Copy	Pink Shoes	PIN0001	Class1	Category3 Category1		6	V No	0	CO0000018	IFEE	Cost Per Copy	Service	512.701	76.905	589.606	SAM001
-	-		0.10.0		100001			•				108 of 108				27,130.29	4,069.54	31,199.84	

- A *Run Adhoc Escalations* message box will pop up asking;
 - Are you sure you want to escalate the selected items?
- Click on Yes.

Þ •						Adhoc Esca	ations -	BPO: Ver	sion 2.5.1.4 - Exampl	le Company						-	- 2
😂 Ho	ome Equipme	ent / Locations Con	tract Finance / HR I	nventory Ma	intenance / Proj	jects Manufact	uring	Procurent	ent Sales Serv	rice Reporting	Utili	ities					- 8
8	2		A														
Save Back	Save Layou	it Workspaces Exp	ort														
Process	Fo	rmat / Prin	E.,														
ontract Types	to be escalated																
Marked	ContractType	ContractTypeDesc	ShortTerm					Eccalat	ion Percentage	15 🗘 🥑							
•	CPC	Cost Per Copy	No					Escalat	on Percentage	13 🕈 🔘							
	PRE	Prepaid Contract	No				_										
	REN	Rental Contracts	No				D										
									ExdFromEscalation	ContractNo	Type	ContractTypeDesc	FeeTypeDesc	Amount	Increase	NewAmount	Customer
							9	8	×D:	10:	(0)	10:	-O:	-	-	-	<d:< td=""></d:<>
			10.01					1	Yes	CO000081	AMCH	Cost Per Copy	Aggregate Mono meter 0	52.500	7.875	60.375	TIA001
ee Types to be Marked	Code	CodeDescription						×.	Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Colour Meter 0	105.000			TIA001
Markeu	REN	Standard Rentals						1	No	C00000080	AMCH		Aggregate Mono meter 0	60.500			OFF001
	W	Renew Fee					_		No	000000079	AMCH	Cost Per Copy	Aggregate Mono meter 0	78,750			HOP001
	I	Inhouse Rental				Run Adhoc	iscalatio	~		×							
	N	Insurance				Null Plantoc				^	AMCH	Cost Per Copy	Aggregate Mono meter 0	82.688			PIN0001
	R	Bank Rental									AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000			OFF001
	S	Service				2 A	e you su	e you wa	nt to escalate the sele	cted items?	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000			TIA001
Contracts to be			10.01								AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000			TIA001
Jontracts to be	escalated					-					AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HOP001
Drag a column l	header here to g	roup by that column							Yes	No	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	PIN0001
Marked	ContractNo	ContractTypeDesc	CustomerName	CustomerCode	Class	Congress					CBTB	Cost Per Copy	BTOB - Mono meter 0	6.655	0.998	7.653	OFF001
7 🖌	1 0 0	* D ¢	8 0 0	* 0 4	A C C	* 0 :	•	\checkmark	No	CO000072	CBTB	Cost Per Copy	BTOB - Mono meter 2500	10.000	1.500	11.500	HOP001
	CO0000012	Prepaid Contract	Titan Group	TIA001	Class3	Category 1		\checkmark	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.075	0.575	TIA001
	CO0000016	Rental Contracts	Titan Group	TIA001	Class1	Category2		\checkmark	No	CO0000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-219.615	-1,683.715	TIA001
	CO0000018	Cost Per Copy	Samanthas Diner	SAM001	Class1	Category3		\checkmark	No	CO0000019	FBTB	Cost Per Copy	BTOB - Bank Rental	423.500	63.525	487.025	OFF001
	CO0000019	Cost Per Copy	Office Supplies Unlimited	OFF001	Class2	Category3		×	No	CO0000074	FBTB	Cost Per Copy	BTOB - Service	275.000	41.250	316.250	DER001
	CO0000022 CO0000031	Cost Per Copy	Samanthas Diner	SAM001 YES001	Class3	Colorest		\checkmark	No	CO000074	FBTB	Cost Per Copy	BTOB - Insurance	500.000	75.000	575.000	DER001
~	C00000031 C00000043	Cost Per Copy Cost Per Copy	Young Electric Hope Works (Pty) Ltd	HOP001	Class3	Category1		V	No	CO0000016	FBTB	Rental Contracts	BTOB - Insurance	300.000	45.000	345.000	TIA001
	C00000044	Cost Per Copy	Bothas Networking inc	BOT0001				1	No	C00000012	IFEE	Prepaid Contract	Service	1.691.036	253.655	1,944.691	TIA001
	C00000072	Cost Per Copy	Hope Works (Pty) Ltd	HOP001	Class3	Category1		1	No	CO0000018	IFEE	Cost Per Copy	Service	1,468.189	220.228	1.688.417	SAM001
		Cost Per Copy	Derton / Technologies	DER001				1	No	CO0000018	IFEE	Cost Per Copy	Service	1.076.671			
	CO000074			PIN0001	Class2	Category3		V	Ne	CO0000018	IFEE	Cost Per Copy	Service	512.701			SAM001
~	CO0000074 CO0000077	Cost Per Copy	Pink Shoes														
2 2 2	CO0000077 CO0000078	Cost Per Copy	Pink Shoes	PIN0001	Class1	Category1	-										
3 3 3 3	CO000077				Class1	Category1	•			108 of 108				27,130.29	4,069.54	31, 199.84	

• The selected escalations will be *saved* and the screen will close.

MNU.115.001