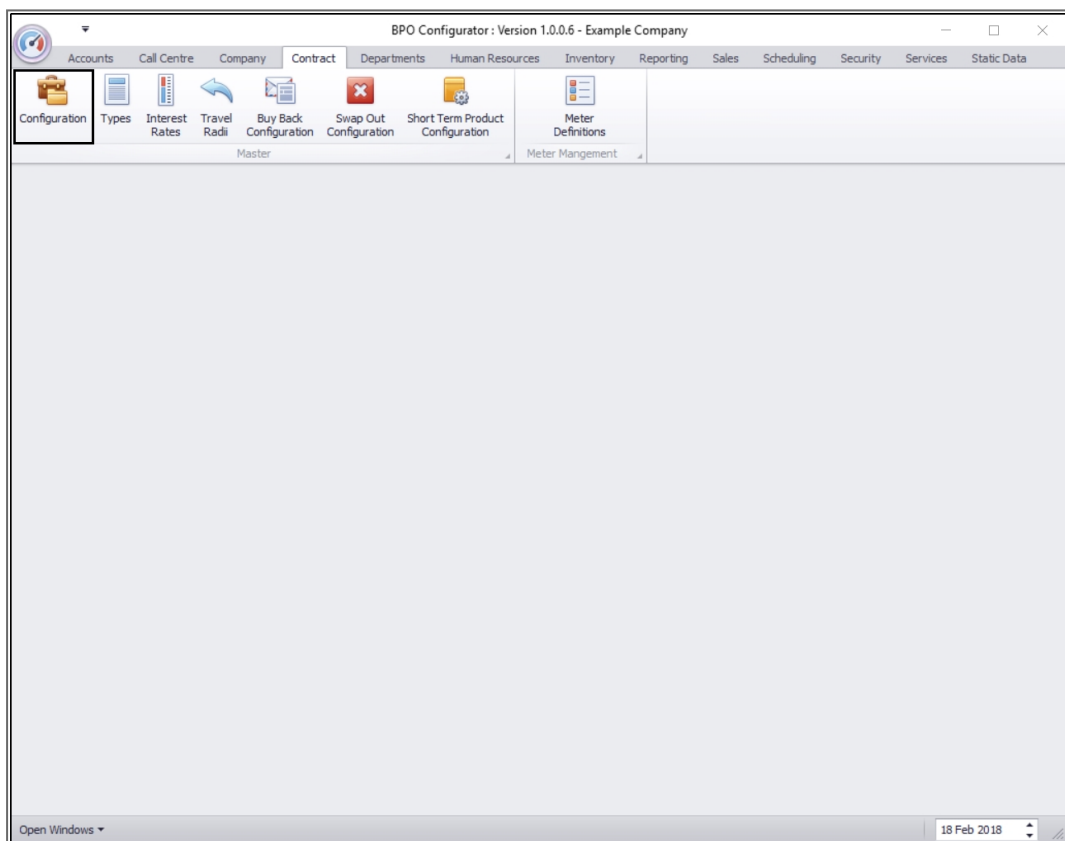


CONTRACT CONFIGURATION

The contract configuration must be set up in order to set up **contract types**. Once contract types have been set up, then contracts can be loaded onto the system.

A unique Meter Reading Request email message template can be configured: Subject, Email Contact, Meter Detail and Email Salutation.

Ribbon Access: *Configurator > Contract > Configuration*



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

- **Billing Method:** Ensure that this is set to **MINMAX**
- **Capture Method:** Ensure that this is set to **BATCH**
- **Auto Bill:** This option is flagged by default.
 - This means that the Billing Batch and the Contract Invoices will be created at the same time during Contract Billing (refer to **Processing: Billing**)
 - Unchecking this flag means that the user will need to run the Billing and then at a later time, create the Invoices from the Billing Batch (refer to **Processing: Billing (Auto Bill flag un-ticked)**).

Example: This scenario may occur when a company has a substantial number of invoices to be created. Instead of slowing down the system and running them at the same time as the Billing Batch, the invoices can be created after hours when the system is freed up.

- **Meter Reading Request Email** configuration:
 - For this configuration, ensure that you use the Parameters as defined in the default setup, so that the correct information pulls through from the database.
 - Update the Subject, Email Content, Meter Detail and Email Salutation as required
 - Click on **Save**.

The screenshot displays the 'Contract Configuration - BPO Configurator' application window. The title bar indicates the version is 1.0.0.6 for 'Example Company'. The main menu includes Home, Accounts, Call Centre, Company, Contract, Departments, Human Resources, Inventory, Reporting, Sales, Scheduling, Security, Services, and Static Data. A toolbar at the top left contains 'Save', 'Back', 'Workspaces', and 'Refresh' buttons. Below the toolbar, the 'Details' section shows 'Billing Method' set to 'Min/Max Method' and 'Capture Method' set to 'Batch Method'. The 'Auto Bill' checkbox is checked. The 'Meter Reading Request Configuration' section is divided into two columns: 'Subject' and 'Email Content' on the left, and 'Meter Detail' and 'Email Salutation' on the right. The 'Subject' field contains 'Meter Usage for @SerialNo test'. The 'Email Content' field contains a template message: 'Dear @ContactName Please supply the meter readings for the following device for the month of @MonthName. Model No. : @ModelNo Serial no. : @SerialNo Location : @Location Address : @AddressLine1, @AddressLine2, @AddressLine3, @AddressLine4 Readings are required for: test'. The 'Meter Detail' field contains 'Meter : @MeterDesc test'. The 'Email Salutation' field contains 'Your assistance is greatly appreciated. @CompanyName test'. The bottom status bar shows 'Open Windows' and the date '18 Feb 2018'.

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