

# CONTRACT

## SHORT TERM CONTRACT - ADD CONTRACT

In order to create a **Short Term Contract**, you need to ensure that a Short Term <u>Contract Type</u> is configured on the system.

You will also need to configure the standard short term charges for <u>Short</u> <u>Term Products</u>.

Only internal assets can be linked to short term contracts.

The system auto creates the **work order**, the **part request** and auto issues the **internal asset**.

If a deposit is set at contract creation, the system auto creates the **deposit invoice**.

**Ribbon Access:** Contract > Short Term Contracts

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

• Click on *Add*.



#### Short Term Contract - Add Contract

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## **ADD CUSTOMER DETAILS**

• Click on the *search* button in the *Customer Name* field.



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- The *Select a customer for this contract* pop up screen will appear.
- Select the *row* of the *customer* that you wish to *create* a short



term contract for.

• Click on Ok.

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• Click on the *search* button in the *Contact Name* field.



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- The *Select a contact for this Order* pop up screen will appear.
- Select the *row* of the *contact* that you wish to link to this short term contract.
- Click on *Ok*.



### Short Term Contract - Add Contract

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		Mandy Jefferson	METER	Meter User	Jane.	Ahdh.	standard@noemail.coza	031 123 45671	1
			STD	Standard Contact	Kely	Jones		031 123 4567	X
			STD	Standard Contact	larry	king	standard@noemail.coza	031 123 4567	ş
	D	Simon Richardson	ACCOUNTS	Accounts Contact	Mandy	Jefferson	bianca@co3.co.za	031 555 1234	1
			STD	Standard Contact	Mary	Jackson	standard@noemal.coza	031 123 4567	1
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• Click on the *search* button in the *Shipping address* field.



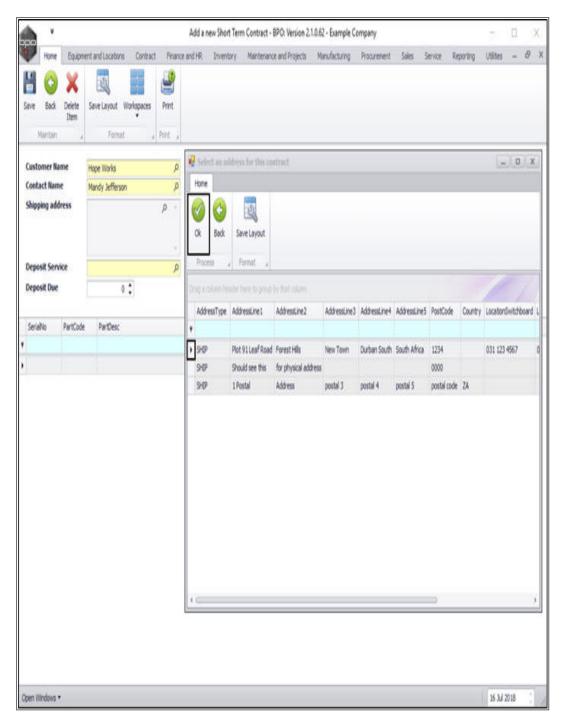
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- The *Select an address for this contract* pop up screen will appear.
- Select the *row* of the *address* that you wish to link to this short



term contract.

• Click on *Ok*.





### **DEPOSIT SERVICE AND DEPOSIT DUE**

If a deposit <u>is</u> required, you need to ensure that it is logged at this point. In this step you will need to search for and select the **Deposit Service** as configured in **Services**.

If a deposit is <u>not</u> to be paid, continue this process at the <u>contract details</u> section.

• Click on the *search* button in the *Deposit Service* field.



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- The *Select the supplied services* pop up screen will appear.
- Select the *row* of the *service* that you wish to link to this short term contract.
- Click on *Ok*.



#### Short Term Contract - Add Contract

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						DEL	Delvery Fee	M	SER	150.00		VAT	1	15.00			
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• In the *Deposit Due* field, either type in or use the arrow indicators to select the amount of deposit due.



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## **CONTRACT DETAILS**

• **Start Date:** Either type in or click on the drop-down and use the calendar function to select the start date for this contract.



- Duration Type: Click on the drop-down arrow and select from the list the duration type for this short term contract (*Hours, Day, Week*).
- **Duration:** Either type in or use the arrow indicators to select the duration amount.
- End Date: This field will auto populate depending on the information entered in the Start Date, Duration Type and Duration fields. You can either type in or click on the drop-down and use the calendar function to select an alternative end date for this contract if required.
- **Salesman:** Click on the drop-down arrow and select from the list the salesman responsible for this short term contract
- Location: Click on the drop-down arrow and select from the list the location for this short term contract
- **Reference:** Type in a reference for this short term contract if required. This may be a customer reference.



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## ADD A NEW PART (ITEM)

When you have finished adding details to the short term contract information frame, move down the screen to the *Parts* frame.



• Click in the *Serial No* field.

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• The *Select an asset to add to this contract* pop up screen will appear.



• Click on the *row selector* in front of the *asset* that you wish to link to this short term contract.

**Note**: As explained in the introduction, only **internal assets** can be linked to a short term contract. In this image you can see in the *Warehouse Name* and *Bin Name* columns, that the system has only displayed the parts available in the *Assets Warehouse* and the *Internal Assets* bin.

• Click on *Ok*.



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	lo1234	AREG000169	SP2020	SP 2020 Sprint Colour Multi Functional Copier	SP2020	Assets Warehouse	Internal Assets	1	0.0	0 A		
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	2020-9867LU	AREG000262	SP 1818	Sprint copier		Assets Warehouse	Internal Assets	1	0.0	A 0		
	SIN13512345		1458-96523	K147 Kyocera Colour Copier	K147	Assets Warehouse	Internal Assets	1	0.0	A G		
	1912-102030		SP19-123456	SP 19-12 Colour Copier	\$919-12	Assets Warehouse	Internal Assets	1	0.0	A C		
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	121212	AREG000031	\$9500	Sprint Colour Copier		Assets Warehouse	Internal Assets	1	0.0	A 0		

- The selected part details will now populate the *Serial No*, *Part Code*, *Parts Description*, *Model No* and *Status* fields.
- A new row will be created for another part to be added to this



frame if required.

• Click on the *expand* icon in the row of the added part.

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• The Item Fees and Item Meters frames will be expanded



#### **ITEM FEES**

- This columns in this frame will populate with the *default charge* (s) from the *product configuration*.
  - **Marked:** Click on this check box if you wish to link this item fee.



Image: Several state       Image: Several state       Image: Several state       Image: Several state         Maintain       More Works       Print       Print       Image: Several state         ustomer Name       More Works       Print       2018/07/16       •	Image: Source Name Item       Image: Source Name Item       Print         Austure Item       Print       Print         Austure Item Print       Print       Print         Austure Item       Print Print Contract/Deposit       Print         Austure Item Print       Print Print Colour Multi Functional Coper       Spozit         Austure Item Printers       Print Print Colour Multi Functional Coper       Spozit	and the second second			Add a new Short Ter	m Contract - BP	O: Version 2.1.0.6	2 - Example	Company				5		
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#### **ITEM METERS**

• Click on the *Item Meters* tab.



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The *Item Meters* frame will be expanded.



- 1. You will note that the *Is Active* column initially states 'No'.
- 2. Click on the *Marked* check box(es) in front of the *meters*(s) you wish to link to this short term contract.

<b>*</b>		Add a	new Short Term	Contract - BPI	0: Version 2.1.0.	62 - Examp	ple Company	y.				5	۵	2	K
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- In this image you can see that the *Marked* check boxes are now *ticked* and the *Is Active* fields now display 'Yes'.
- 2. Now go to the *Reading Date* fields and either type in or click on the drop-down arrow and use the calendar function to select the date. (This reading should be taken on the date the contract starts so that the contract invoice will be correct).



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Click in the *Start Reading* fields and either type in or use the directional arrows to select the correct meter reading amount. (This reading <u>must</u> be recorded - so that the contract invoice will be correct).



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• Click in the *Charge Rate* fields and either type in or use the directional arrows to select an alternative charge rate if required.



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## LINK ADDITIONAL ITEMS

 If you wish to add additional items to this contract, click in the Serial No field in the new row of the Parts frame.



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 An *ellipsis* button will be revealed. Follow the <u>Add a New Part</u> (<u>ltem</u>) steps to complete this process.



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## SAVE SHORT TERM CONTRACT

• When you have finished adding the details and linking the parts to the short term contract, click on *Save*.



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- The contract will be *saved* and you will return to the *Short Term Contract Listing* screen.
- Here you can view the new contract information.



#### Short Term Contract - Add Contract

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STCO	000020	ST .	Short Te	m Contracts	BPO2 Test 7	H0P001	Hope Wor	ks	Tech	Ted	hnical			14 Nov 2016	15 Nov 2016	1	đ	Days
STCO	000021	ST	Short Te	m Contracts	Main	APP0001	Apple Juic	e Inc	Sales	Sale	ns Departm	ent.	1234	08 Jun 2017	08 Jun 2017	2	h	Hour
STCO	000022	ST	ShortTe	m Contracts	BPO_RSI	ABCXYZ123	ABC Shoe	Co					fdg	26 Jun 2017	03 34 2017	1	w	Week
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stco	000027	গ	Short Te	rm Contracts	Durban Area	HOP001	Hope Wor	ka	Tech	Ted	hnical		HW STC 001	15 3.6 2018	30 34 2018	2	W	Week

• If you updated the Deposit Charge details, a <u>Sales Deposit</u> <u>Invoice</u> will be automatically created, which you can <u>print</u>.

**Related Topics** 



- Edit Short Term Contract
- Short Term Contract Invoice
- <u>Reprint Short Term Contract Invoice</u>
- <u>Create Machine Return Work Order</u>
- <u>Close Short Term Contract</u>
- Contract and Return Report

MNU.158.002