

CONTRACT

ADD CONTRACT ITEM INCLUSIONS

You will be following the process below to add each item to be linked to this contract, where Inclusions apply.

Item Inclusions Frame

- Click on the *Item Inclusions* tab.

The *Item Inclusions* frame will be expanded.

- In the *Item Inclusions* frame, you can add all *Contract Inclusions* (items which are included in the contract and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically “included” in the contract and are covered by a set contract fee agreed between the customer and service provider.
- Although they are included, you can have a breakdown of each individual inclusion. This breakdown is achieved by utilising the [Link Fee](#) panel within the Item Inclusion panel. For more information, refer to the [Link Fee](#) topic.

▮

Add Item Inclusions

- *Right click* anywhere in a *row* of the *Item Inclusions* frame.
- A *Process* menu will pop up with the following options:
 - **Part:**[Add Part Inclusion](#)
 - **BOM:**[Add Bill Of Materials Inclusion](#)

- **Craft:**[Add Craft Inclusion](#)
- **Service:**[Add Service Inclusion](#)
- **Link Fee:**[Link A Fee To An Inclusion](#)
- **Delete:**[Delete Inclusion](#)

▮

Add Part Inclusion

- Click on **Part** - Add Part Inclusion.

▮

- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a part inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.

▮

- A **Select a part** screen will pop up.
- Click on the **row selector** in front of the **part** you wish to **add** to this contract as an **inclusion**
- Click on **Ok**.

▮

- The selected part will be **added** to the **Item Inclusion** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the SLA type of the selected item.

- **Quantity:** Type in the quantity included for the selected part.
- **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.

▮

Add Bill of Materials Inclusion

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **BOM** - Add BOM Inclusion.

▮

- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??**
- Click on **Yes**.

▮

- A **Select a bill of material** screen will pop up.
- Click on the **row selector** in front of the **BOM** you wish to **add** to this contract as an **inclusion**.
- Click on **Ok**.

▮

- The selected **BOM** will be added to the **Item Inclusions** frame.
- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.

- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected BOM.
- **Fee Type:** This field will only be populated if you **link a fee** to the inclusion.

▮

Add Craft Inclusion

- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** - Add Craft Inclusion.

▮

- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Craft inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.

▮

- A **Select a craft** screen will pop up.
- Click on the **row selector** in front of the **craft** you wish to **add** to this contract as an **inclusion**.
- Click on **Ok**.

▮

- The selected **Craft** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.

- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the number of hours included for the selected Craft.
- **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.

▮

Add Service Inclusion

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **Service** - Add Service Inclusion.

▮

- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Service inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.

▮

- A **Select a service** screen will pop up.
- Click on the **row selector** in front of the **service** you wish to **add** to this contract as an **inclusion**.
- Click on **Ok**.

▮

- The selected **Service** will be added to the **Item Inclusions** frame.

- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected Service.
- **Fee Type:** This field will only be populated if you **link a fee** to the inclusion.



- **Note:** You can add more than one of each type of item inclusion to the contract.

Link a Fee to an Inclusion

- **Right click** in the **row** of the **item inclusion** that you wish to **link a fee** to.
 - In this image **IT Technician** has been selected.
- The **Process** menu will pop up.
- Click on **Link Fee** - Link Fee to this Inclusion.



- A **The Fee Lookup List** screen will pop up.
- Click on the **row selector** in front of the **fee** you wish to **add** to this **inclusion**.
- Click on **Ok**.
 - **Note:** Only the fees that you selected in the **Item Fees Frame** will be displayed in this

screen, and the fee can only be linked to one inclusion.

▮

- The **The Fee Type** field will be populated with the selected fee type.
 - In this image, **S** - Service was selected, since the selected inclusion is covered by the Service Fee, in this example.

▮

View the linked Inclusion on the Fee Detail

Note: that for this step you will need to save the contract first and then come back to view the Fee's linked Inclusion.

- Click on the **Item Fees** frame.
- Click on the **Expand** button on the fee you linked to an inclusion.
- The **Fee Inclusions** frame will be displayed.
- You can now view the details of the inclusion.
- You can change the **Quantity** of the inclusion in this frame if required.

▮

Delete Inclusion

- Another option in the **Item Inclusions Process** menu is **Delete Inclusion**.
- **Right click** in the **row** of the **item inclusion** that you wish to **delete** from the contract.
 - In this image **INST** - Installation Fee has been selected.

- The **Process** menu will pop up.
- Click on **Delete** - Delete Inclusion.

↓

- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to delete this item inclusion - [Serial Number or Location Description]?**
- Click on **Yes**.

↓

- The selected item will now be **removed** from the **Item Inclusions** frame.

↓

Next: Link Contract Item [Contacts](#)

NUCL.CTRT.004.008