

We are currently updating our site; thank you for your patience.

SALES

CUSTOMERS - CONTRACTS

The **Contracts for Customer** screen lists all the Contract information linked to a specific Customer and is a <u>view only</u> screen. The Contract Number and Contract Type as well as the Currency, Start Date and End Date can be viewed here.

Ribbon Access: Sales > Customers



- 1. The **Customer Listing** screen will be displayed.
- 2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
- 3. Select the **Status** for the customer.
 - The example has Active **Durban** selected.
- 4. Select the **row** of the **Customer** you wish to view the Contract information for.
- 5. Click on the **Contracts** tile.



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6. The **Contracts for Customer - [**customer code**]** screen will be displayed.

You can only view the contracts linked to this customer in this screen.

- 7. The current contract **Fees** and **Info** frames containing contract fee history are pinned to the **Contracts for Customer** screen, for your convenience.
 - Unpin to hide the Fees and/or Info frames.



Contracts for Customer - TIA001 - BPO: Version 2.4.0.11 - Example Company	
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Open Windows ▼ User : JulandaK 15/01/2021 Ver:	sion : 2.4.0.11 Example Company

- Although you cannot edit the details in this screen, you can use the Save Layout button to keep your changes, for example, <u>any data grid</u> <u>changes</u> or pinning / unpinning frames.
- 9. Click on **Back** to return to the Customer Listing Screen.



Customers - Contracts

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