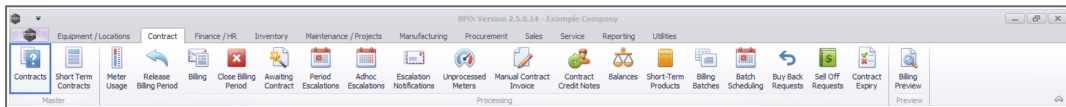


We are currently updating our site; thank you for your patience.

CONTRACT

CONTRACTS – ITEM CONTACT

Ribbon Select **Contract** > **Contracts**



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

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

The screenshot shows the 'Contract Listing' window with a table of contract items. The table has the following columns: ContractNo, CustomerC, CustomerName, CustomerD, ContractType, ContractTy, Location, OrderNo, StarDate, EndDate, Department, Period, PeriodType, BillingCycle, BillingPeriod, and Bill. The first row is highlighted in light blue.

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractTy	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bill
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months	Months	3	
CO000016	TI4001	Titan Group		CPC	Cost Per Co.	Man		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	Months	4	
CO000018	SAM001	Sanambhas Diner		CPC	Cost Per Co.	Man		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	Months	5	
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Man		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual	Months	6	
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000031	YE5001	Young Electric		CPC	Cost Per Co.	Hlorest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Man		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months	Months	5	
CO000042	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Man		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months	Months	7	
CO000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Man		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	Months	5	
CO000052	HCP001	Hope Works (Pty) Ltd		PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months	Months	3	
CO000054	AFP0001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months	Months	0	
CO000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	Months	2	
CO000073	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	Months	Months	0	
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	Months	6	
CO000077	PIK0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000078	PIK0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months	Months	2	
CO000082	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months	Months	7	
CO000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months	Months	8	

- Select the **row** of the **contract** that you wish to process.

The screenshot shows the same 'Contract Listing' window as above, but with the first row (ContractNo: CO000009) highlighted in light blue. A blue arrow points from the 'Edit' button in the top toolbar to the first row of the table.

- Click on the **Edit** button.

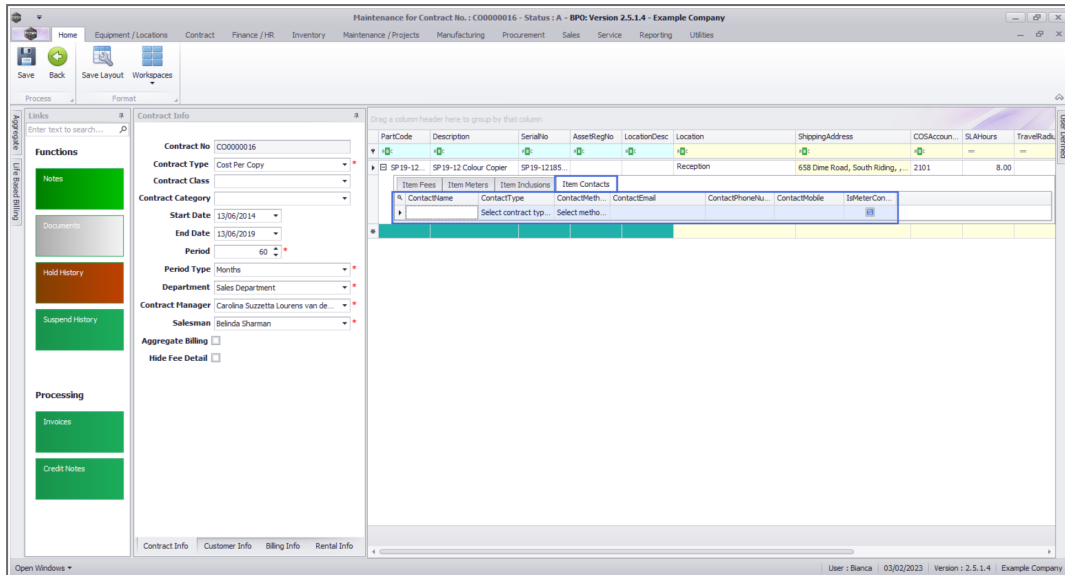
ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StartDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Bill...
CO000012	TTA001	Titan Group		CPC	Cost Per Co.	Durban Area		16/05/2014	16/05/2019	Sales Depart...	60	Months	Months	3	
CO000016	TTA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60	Months	Months	4	
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Durban Area		09/07/2014	09/07/2019	Sales Depart...	60	Months	Months	5	
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60	Months	Bi-annual	6	
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60	Months	Months	1	
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60	Months	Months	5	
CO000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60	Months	Quarterly	5	
CO000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60	Months	Months	2	
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60	Months	Months	6	
CO000077	PSH0001	Perk Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000078	PSH0001	Perk Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60	Months	Months	2	
CO000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	

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

PartCode	Description	SerialNo	AssetRegNo	Location	ShippingAddress	COSAccount	SLA/How
SP19-12...	SP19-12 Colour Copier	SP19-12185...		Reception	658 Dime Road, South Riding, ...	2101	

ITEM CONTACTS

- Ensure you have the contract item selected and then click on the **Item Contacts** tab.
- The **Item Contacts** frame will be **expanded**.

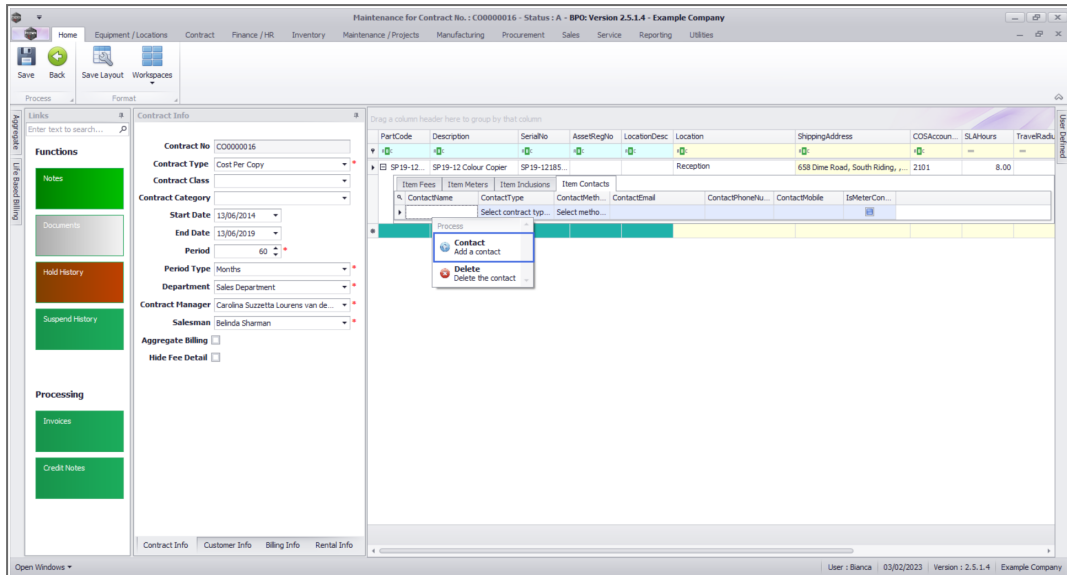


You can add up to 3 types of contacts, depending on your requirements:

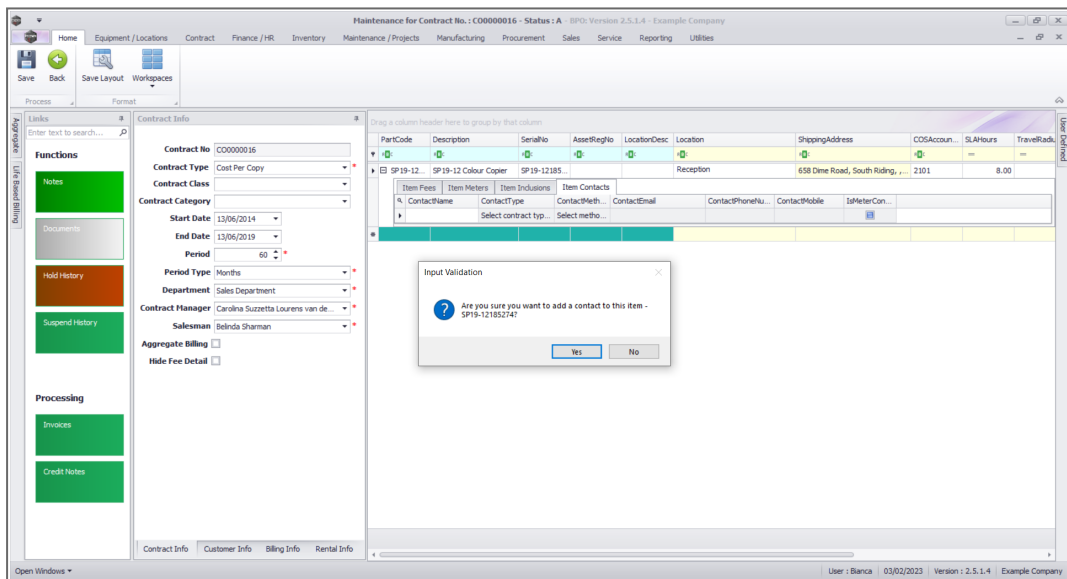
- **Manager Contact:** the client contact who manages the contract or relevant contract item
- **Meter Clicks Contact:** the client contact who will provide meter readings.
- **User Contact:** the client contact who can be called with regards to user queries.

ADD A CONTACT

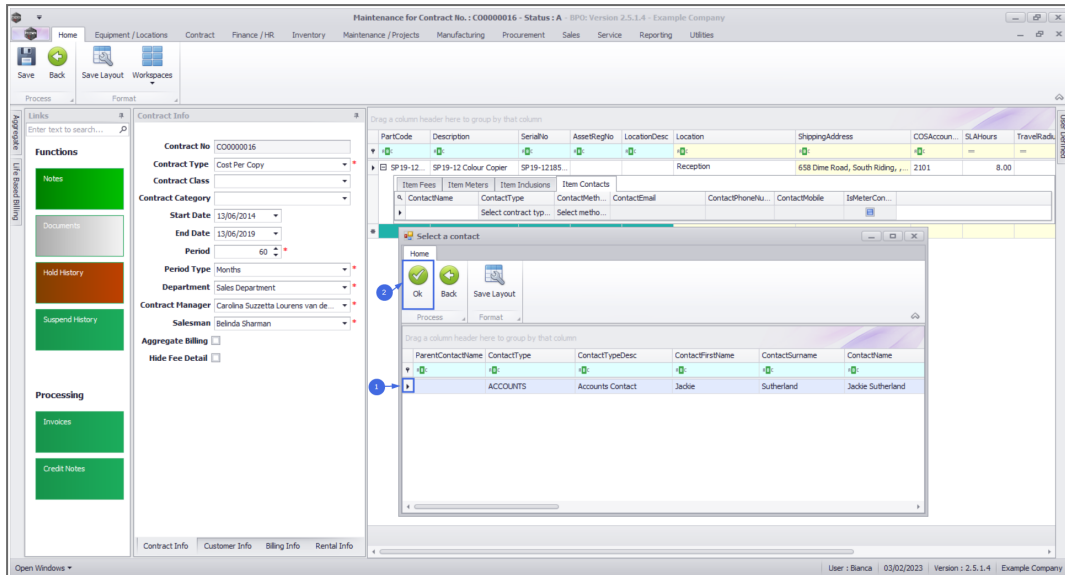
- **Right click** anywhere in the first **row** of the **Item Contacts** frame.
- A **Process** menu will pop up.
- Click on **Contact** - Add a contact.



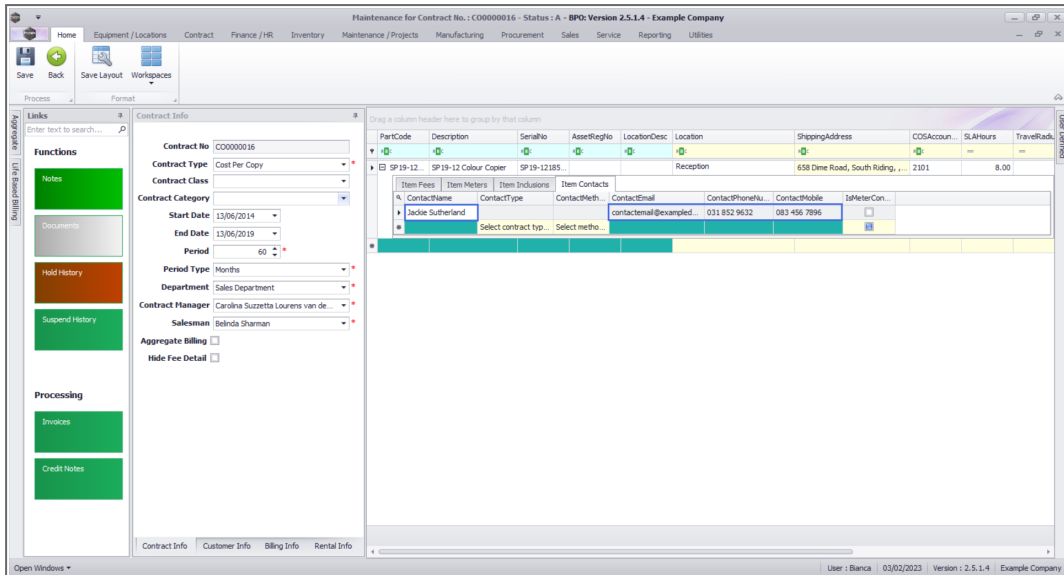
- A **Process Validation** message box will pop up asking:
 - **Are you sure you want to add a contact to this item**
- [Serial Number or Location Description]?
- Click on **Yes**.



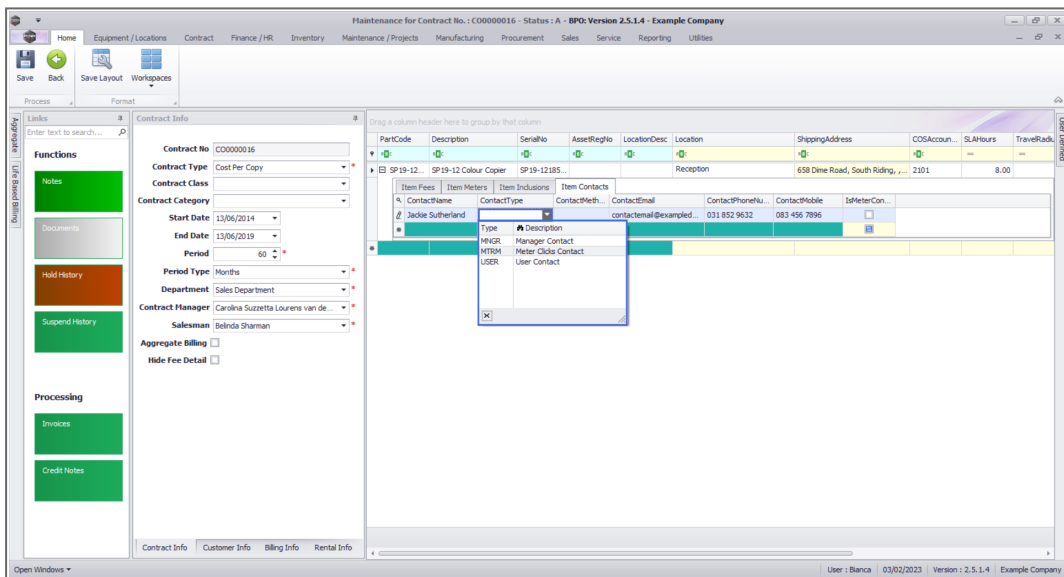
- A **Select a contact** pop up screen will appear.
- Click on the **row selector** in front of the **contact** you wish to **add**.
- Click on **Ok**.



- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address **already set up on the selected contact.**
- **Contact Phone Number:** This will auto populate with the phone number **already set up on the selected contact.**
- **Contact Mobile:** This will auto populate with the mobile number **already set up on the selected contact.**

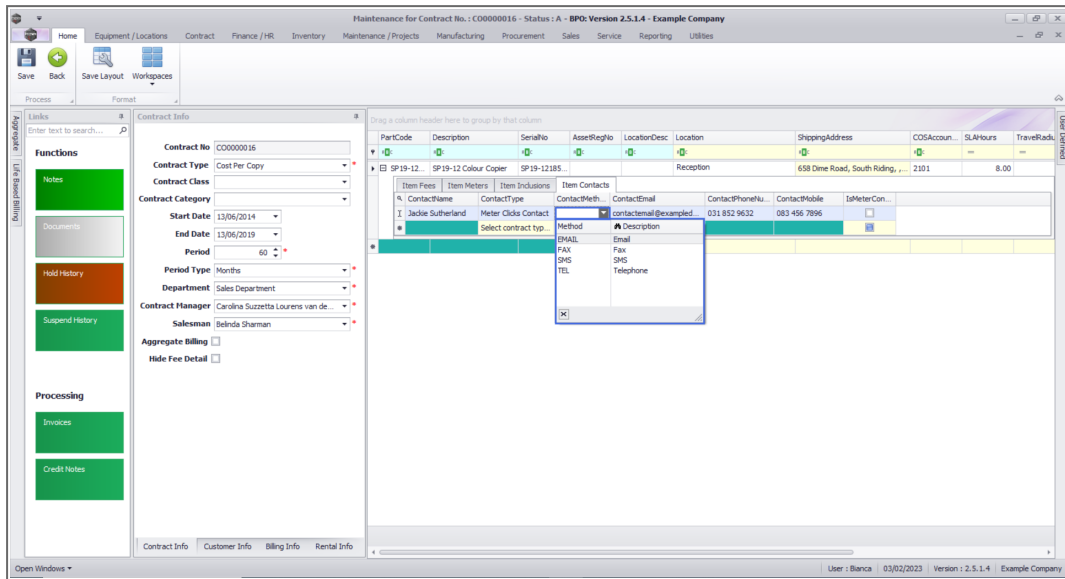


- Click in the **Contact Type** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Type** drop-down **menu**.
- Click on the **contact type** you wish to assign to this Item.

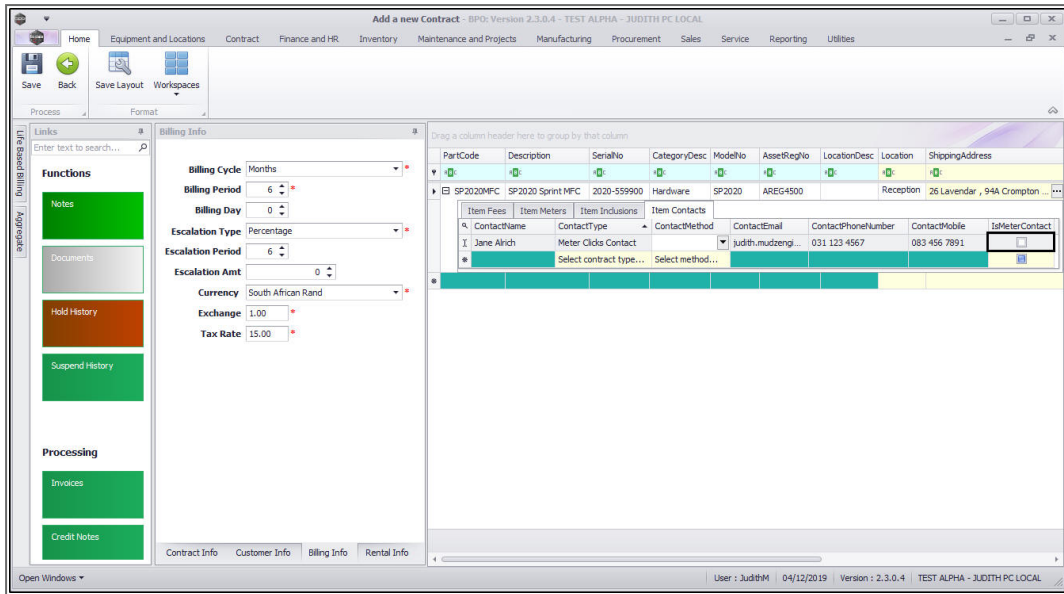


- Click in the **Contact Method** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Method** drop-down **menu**.

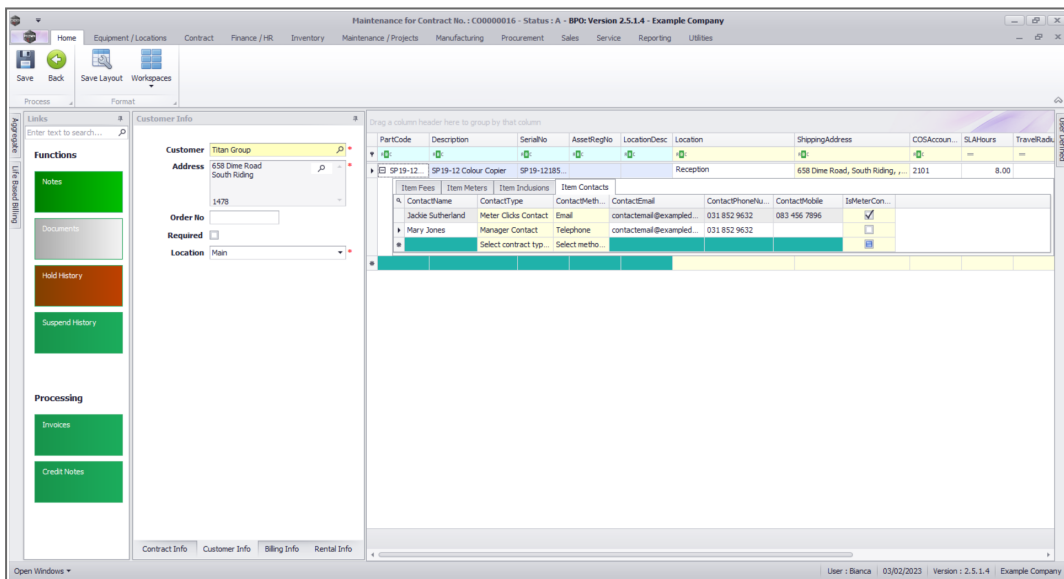
- Click on the **preferred contact method** you wish to use.
 - In this image **Email** has been selected.



- **Is Meter Contact:** Select this check box for the main meter contact - this is important where meter charges have been linked to the contract item, as this contact will display in the Meter Capture screens (Unprocessed Meters and Meter Usage) and will be used when sending Meter Reading Email Requests.

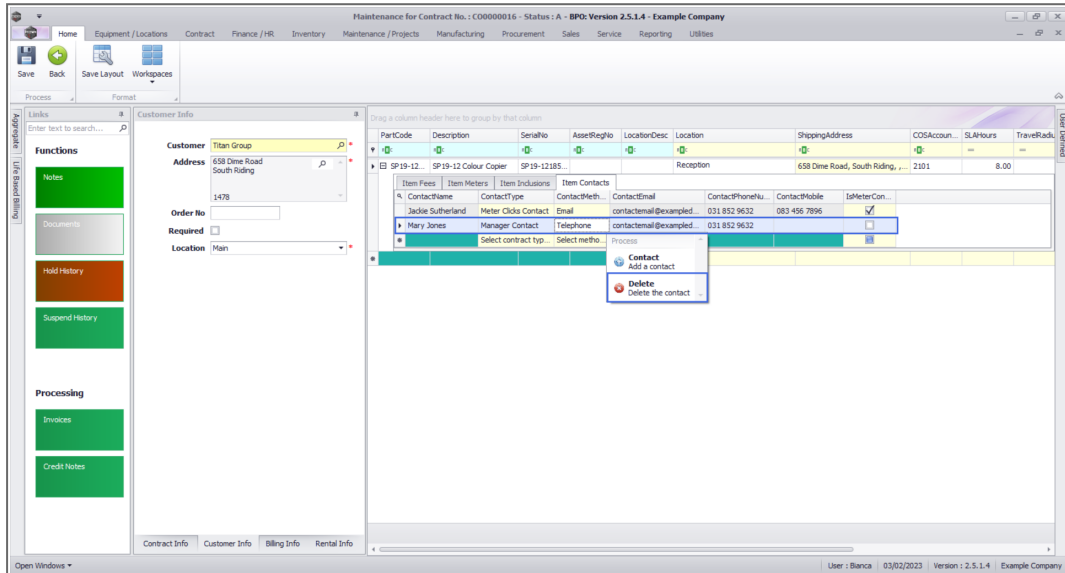


- You can add further contacts to this frame by **right clicking** anywhere in a **row** of the **Item Contacts** frame and following the same process as above.
 - In this image a **second contact** has been added.

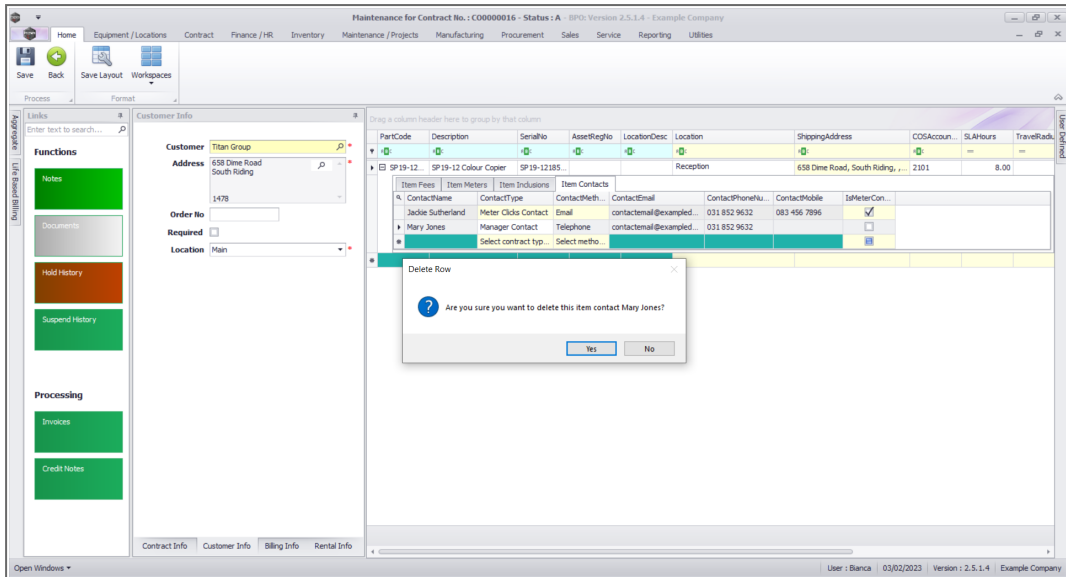


DELETE A CONTACT

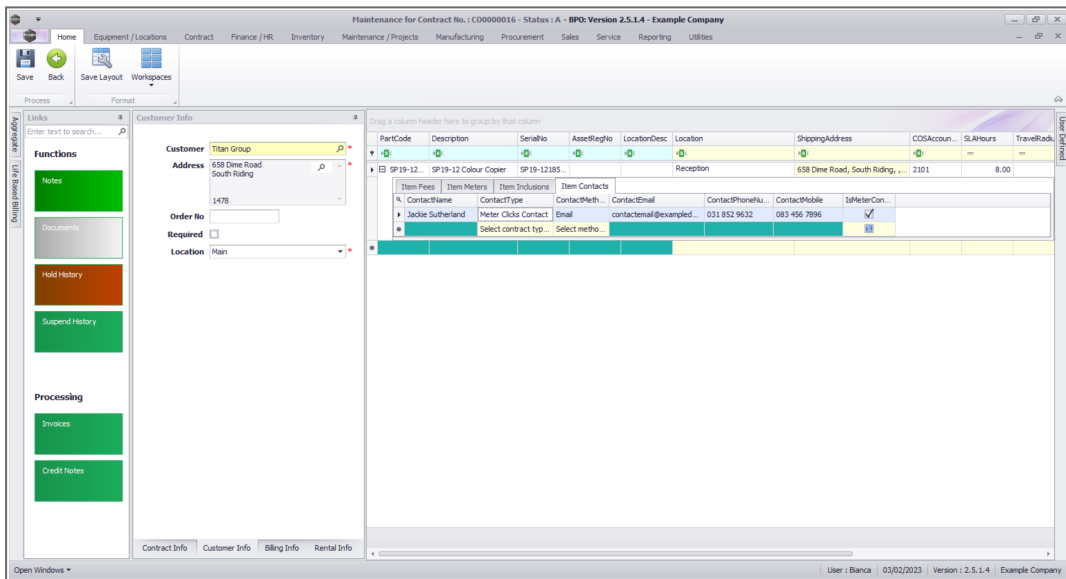
- You can also **delete** a contact if required.
- **Right click** in the **row** of the **contact** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** - Delete the contact.



- A **Delete Row** message box will pop up asking:
 - **Are you sure you want to delete this item contact [Serial Number or Location Description]?**
- Click on **Yes**.

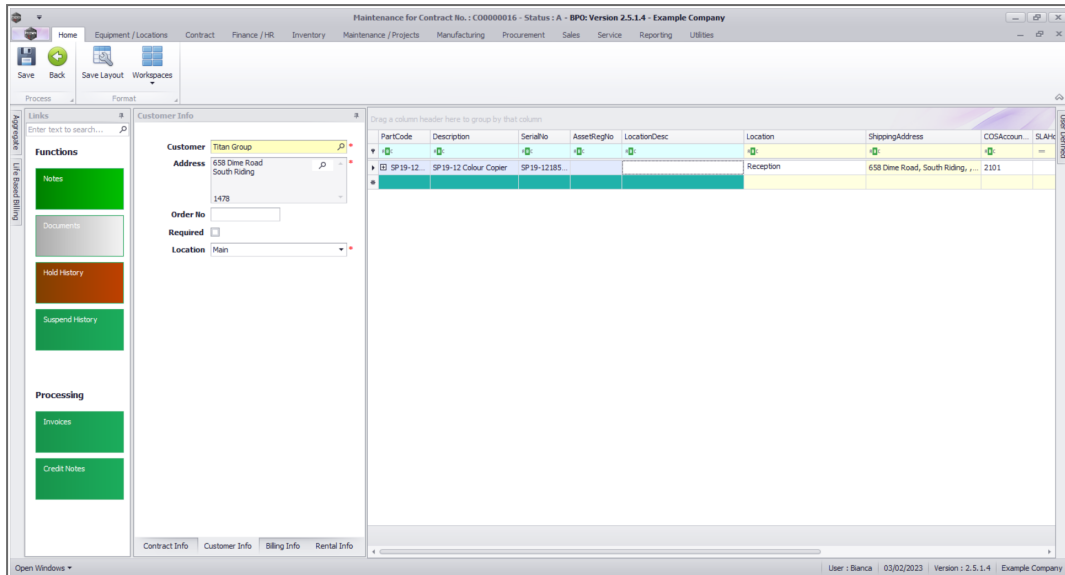


- The contact has now been **deleted** from the **Items Contacts** frame.

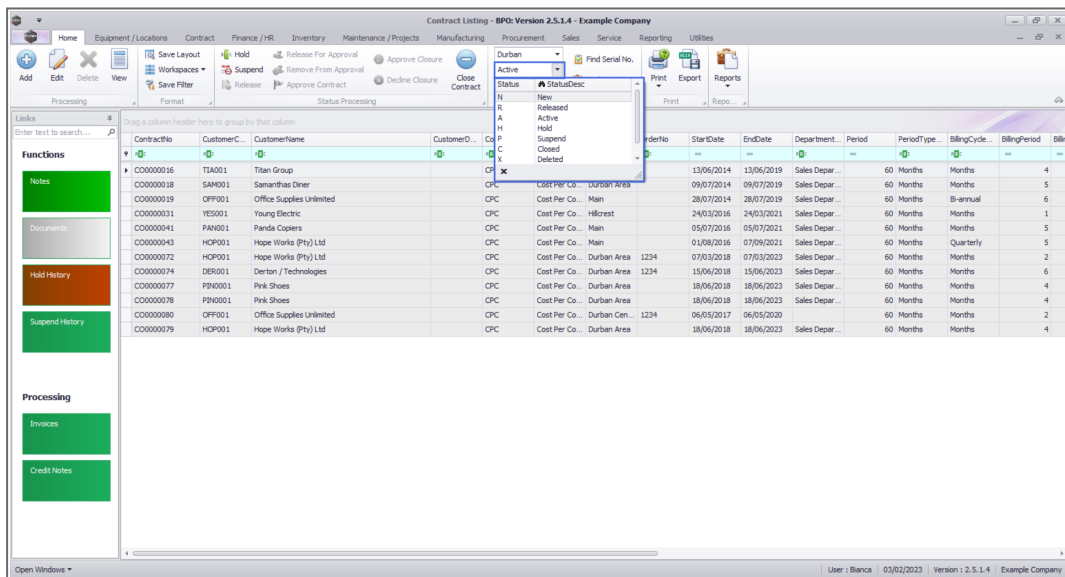


SAVE THE CONTRACT

- When you are done, click on **Save**.

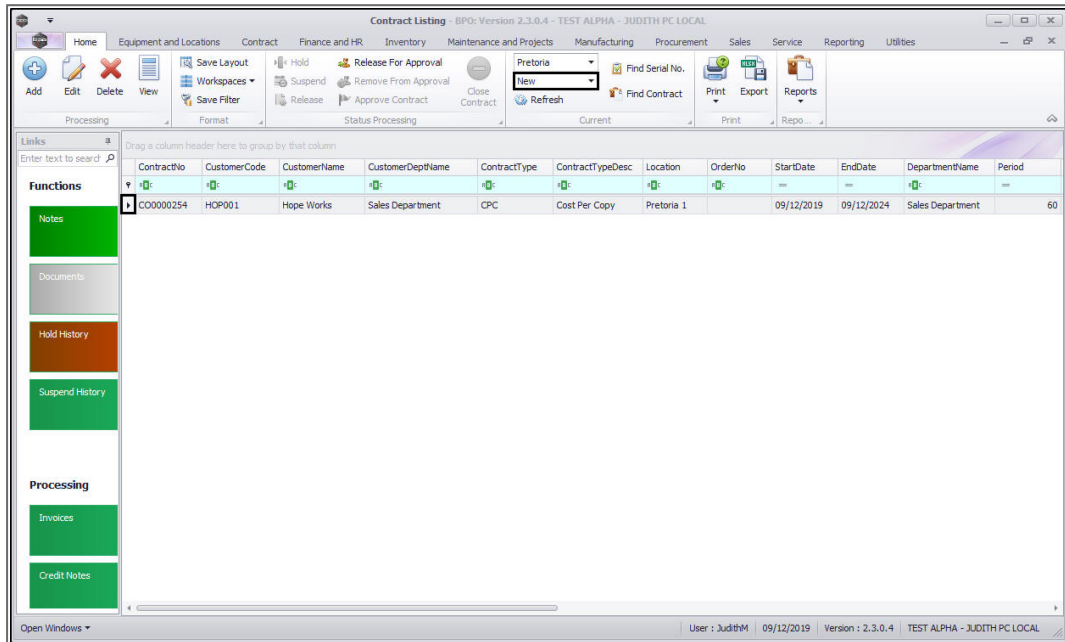


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **New** contracts can be found within the **New** contract status listing screen.

- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- **Edited** contracts may either remain in **Active** status or move to **Released** status in order for changes to be reviewed before **Approval** depending on the change made.



MNU.112.003

