

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

## CONTRACT

### CONTRACTS - NOTES

**Notes** can be viewed and added to a contract from the following screens:

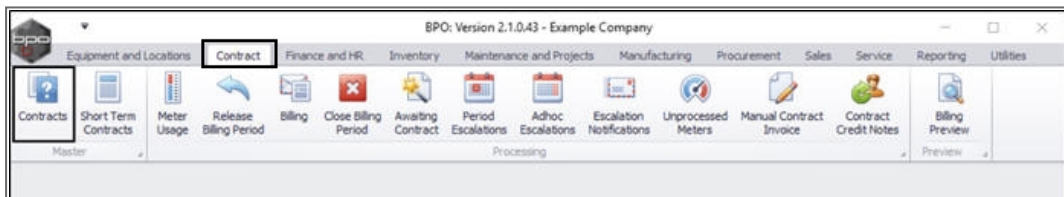
- **Contract Listing**
- **Add New Contract**
- **Contract Maintain**

These Notes cannot be deleted or edited.

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**Ribbon Access:** Contract > Contracts

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The **Contract Listing** screen will display.

- Select the **Site** that you wish to work in.
  - In this example, **Durban** has been selected.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Layout Hold Release For Approval  
Suspend Remove From Approval  
Release Approve Contract Close Contract

Processing Format Status Processing

Links  
Enter text to search...

Functions  
Notes  
Documents  
Hold History  
Suspend History

Processing  
Invoices  
Credit Notes

ContractNo	CustomerCode	CustomerName	CustomerDeptName			OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Hikrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic	CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group	CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO000014	TIA001	Titan Group	CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group	CPC	Cost Per Copy	Main		13 Jun 2014
CO000018	SAM001	Samanthas Diner	CPC	Cost Per Copy	Main		09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited	CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop	CPC	Cost Per Copy	Main		29 Jun 2015
PC000001	DAN002	Dancing Shoes	PRE	Prepaid Contract	floor	test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hikrest	24 Mar 2016
CO000041	PAN001	Panda Copiers	CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Aug 2016
CO000044	BOT001	Bothas Networking inc	PRE	Prepaid Contract	Durban Area		25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	floor	16 May 2017

Open Windows 17 Jan 2018

- By default, this screen will list all the **Active** contracts for the selected site.

- You can click on the **drop-down arrow** in the **Status** field and select an alternative Status if required.

The screenshot displays the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' application. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar contains various action buttons such as Add, Edit, Delete, View, Save Layout, Hold, Release For Approval, Suspend, Remove From Approval, Release, Approve Contract, and Close Contract. A left sidebar lists 'Functions' (Notes, Documents, Hold History, Suspend History) and 'Processing' (Invoices, Credit Notes). The main area shows a table of contract records with columns for ContractNo, CustomerCode, CustomerName, CustomerDeptName, Status, StatusDesc, OrderNo, and StartDate. A dropdown menu is open over the 'Status' column of the first row, showing options: N New, R Released, A Active, H Hold, X Deleted, C Closed, and P Suspend. The 'X Deleted' option is currently selected.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	Status	StatusDesc	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		X	Deleted	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre	07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo 09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre	16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main	16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main	13 Jun 2014
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main	09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main	28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main	29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	floor test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest	24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main	05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main	01 Aug 2016
CO000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area	25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234 10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	floor	16 May 2017

## VIEW NOTES

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- Select the **row** of the contract where you wish to **view** the notes.
- Click on the **Notes** tile.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | View | Save Layout | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports  
 Workspaces | Suspend | Remove From Approval | Active | Find Contract | Refresh | Print | Re...  
 Save Filter | Release | Approve Contract | Close Contract

Processing | Format | Status Processing | Current | Print | Re...

Links  
Enter text to search...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hilcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Copy	Main		09 Jul 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	ifloof	test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hilcrest		24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	ifloof		16 May 2017

Functions  
 Notes  
 Documents  
 Hold History  
 Suspend History

Processing  
 Invoices  
 Credit Notes

Open Windows | 17 Jan 2018

- The **Contract Note Listing For Contract No.:** [ ] screen will open.
- Here you can **view** all the **Notes** and **Comments** that have been linked to this contract.

**Note:** You cannot edit or delete any information in the **Comments** data grid in this screen.

Contract Note Listing for Contract No. : CO0000043 - BPO; Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Back | Save Layout

Processing | Format

Drag a column header here to group by that column

Comment	Date
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.                      The fee Modified is \$                      Located on Machine : 1912-147258                      The charge amount has changed from 606.38 to 636.69                      Start Date : 07 Sep 2016                      End Date : 07 Sep 2021                      Escalation rate : 10.00                      Account code : 1101                      COS Account code : 2101                      Invoice Description : Service                      Billing Period : 7                      Billing Cycle : m                      Finance Party :                      Finance Amount : 0.00                      Billing Customer : HOP001                      This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001.                      The fee Modified is \$                      Located on Machine : 1912-147258                      The charge amount has changed from 577.50 to 606.38                      Start Date : 07 Sep 2016                      End Date : 07 Sep 2021                      Escalation rate : 10.00                      Account code : 1101                      COS Account code : 2101                      Invoice Description : Service                      Billing Period : 7                      Billing Cycle : m                      Finance Party :                      Finance Amount : 0.00                      Billing Customer : HOP001                      This change was made by : Judith Mudzengi</p>	09 Mar 2017

Open Windows | 17 Jan 2018



## ADD NOTE

- Click on **Add**.

The screenshot shows a software window titled "Contract Note Listing for Contract No. : CO0000043 - BPO; Version 2.1.0.43 - Example Company". The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar on the left contains buttons for Add, Back, and Save Layout. The main area displays a table with two columns: "Comment" and "Date".

Comment	Date
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001.                      The fee Modified is 5                      Located on Machine : 1912-147258                      The charge amount has changed from 606.38 to 636.69                      Start Date : 07 Sep 2016                      End Date : 07 Sep 2021                      Escalation rate : 10.00                      Account code : 1101                      COS Account code : 2101                      Invoice Description : Service                      Billing Period : 7                      Billing Cycle : m                      Finance Party :                      Finance Amount : 0.00                      Billing Customer : HCP001                      This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001.                      The fee Modified is 5                      Located on Machine : 1912-147258                      The charge amount has changed from 577.50 to 606.38                      Start Date : 07 Sep 2016                      End Date : 07 Sep 2021                      Escalation rate : 10.00                      Account code : 1101                      COS Account code : 2101                      Invoice Description : Service                      Billing Period : 7                      Billing Cycle : m                      Finance Party :                      Finance Amount : 0.00                      Billing Customer : HCP001                      This change was made by : Judith Mudzengi</p>	09 Mar 2017

The bottom of the window shows "Open Windows" and a date of "17 Jan 2018".



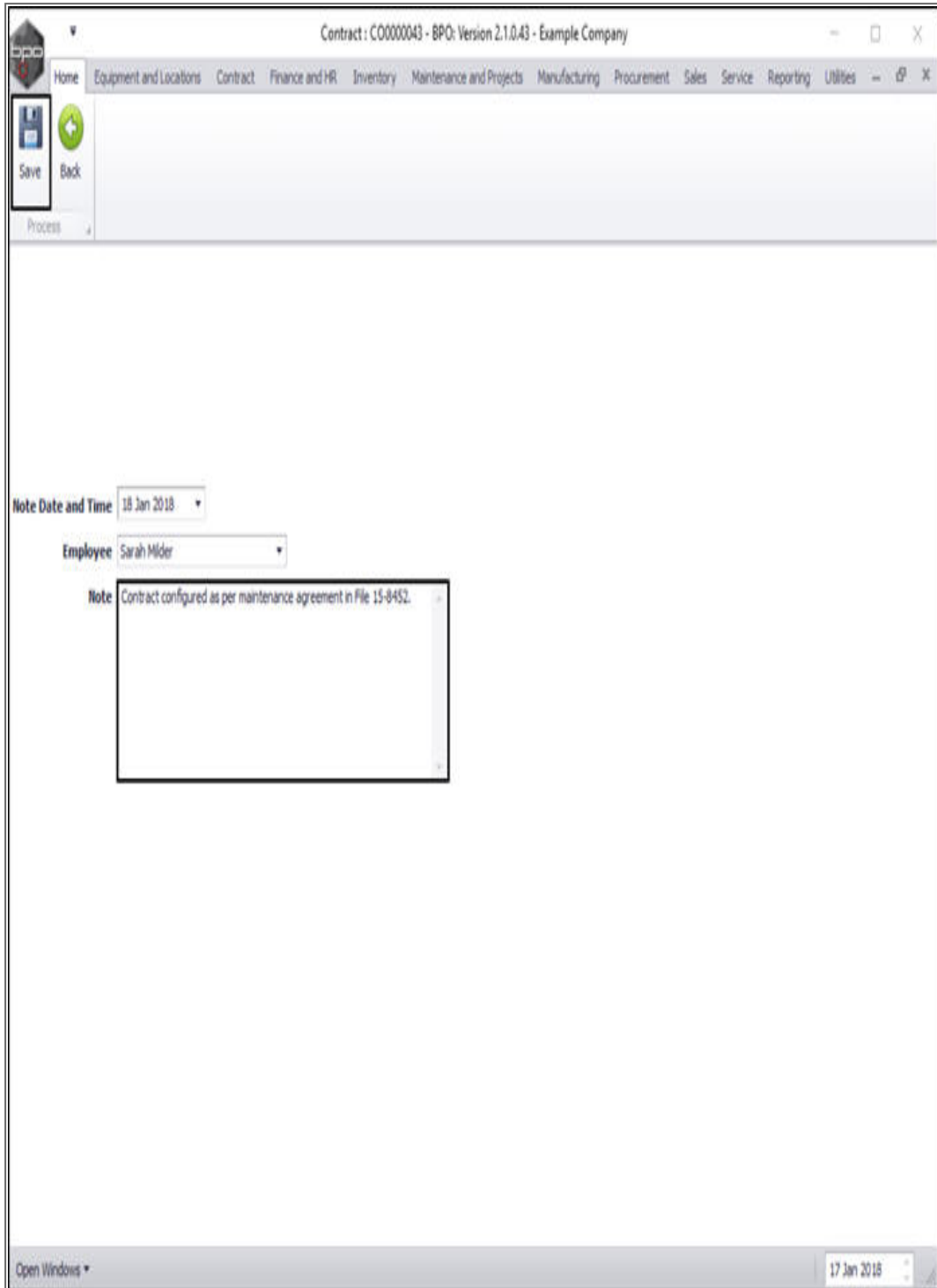
The **Contract: []** screen will open. You can view the following details:

- **Note Date and Time:** This will auto populate with the current date.
  - You can either type in, or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Employee:** This will auto populate with the person currently logged on to the system.
  - You can click on the drop-down arrow and select an alternative person, if required.
- **Note:** Type in details relevant to this contract.

The screenshot shows a web application window titled "Contract : CO0000043 - BPO: Version 2.1.0.43 - Example Company". The top navigation bar includes "Home", "Equipment and Locations", "Contract", "Finance and HR", "Inventory", "Maintenance and Projects", "Manufacturing", "Procurement", "Sales", "Service", "Reporting", and "Utilities". On the left, there are "Save" and "Back" buttons, and a "Process" dropdown menu. The main content area is mostly blank, with a highlighted form for adding a note. This form includes a "Note Date and Time" dropdown set to "18 Jan 2018", an "Employee" dropdown set to "Sarah Milder", and a large text area labeled "Note". At the bottom left, there is an "Open Windows" dropdown, and at the bottom right, a date indicator shows "17 Jan 2018".

## SAVE NOTE

- When you have finished adding your note, click on **Save**.



The screenshot shows a software window titled "Contract : C00000043 - BPO: Version 2.1.0.43 - Example Company". The window has a menu bar with options: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utilities. Below the menu bar is a toolbar with "Save" and "Back" buttons. The main area contains a "Process" dropdown menu. Below this, there are two dropdown menus: "Note Date and Time" set to "18 Jan 2018" and "Employee" set to "Sarah Milder". A text area labeled "Note" contains the text "Contract configured as per maintenance agreement in File 15-8452." The bottom of the window shows "Open Windows" on the left and a date "17 Jan 2018" on the right.

- You will return to the **Contract Note Listing for Contract No.:** screen.
- A **Contract Processing** message box will pop up advising the following:
  - Note has been added to Contract No: [].
- Click on **OK**.

Contract Note Listing for Contract No. : CO0000043 - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Back | Save Layout

Processing | Format

Drag a column header here to group by that column

Comment	Date
Contract configured as per maintenance agreement in File 15-0452.	18 Jan 2018
A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 606.38 to 636.69 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HOP001 This change was made by : Judith Mudzengi	09 Mar 2017
A contract item fee has been Modified on Contract No. CO0000043, for customer HOP001. The fee Modified is 5 Located on Machine : 1912-147258 The charge amount has changed from 577.50 to 606.38 Start Date : 07 Sep 2016 End Date : 07 Sep 2021 Escalation rate : 10.00 Account code : 1101 COS Account code : 2101 Invoice Description : Service Billing Period : 7 Billing Cycle : m Finance Party : Finance Amount : 0.00 Billing Customer : HOP001 This change was made by : Judith Mudzengi	09 Mar 2017

Contract Processing

**i** Note has been added to Contract No : CO0000043.

OK

Open Windows | 17 Jan 2018

## VIEW ADDED NOTE

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- You can now view the newly added note.
- Click on **Back** to return to the **Contract Listing** screen.

Contract Note Listing for Contract No. : CO0000043 - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add
Back
Save Layout

Processing | Format

Drag a column header here to group by that column

Comment	Date
Contract configured as per maintenance agreement in File 15-8452.	18 Jan 2018
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001.            The fee Modified is 5            Located on Machine : 1912-147258            The charge amount has changed from 606.38 to 636.69            Start Date : 07 Sep 2016            End Date : 07 Sep 2021            Escalation rate : 10.00            Account code : 1101            COS Account code : 2101            Invoice Description : Service            Billing Period : 7            Billing Cycle : m            Finance Party :            Finance Amount : 0.00            Billing Customer : HCP001            This change was made by : Judith Mudzengi</p>	09 Mar 2017
<p>A contract item fee has been Modified on Contract No. CO0000043, for customer HCP001.            The fee Modified is 5            Located on Machine : 1912-147258            The charge amount has changed from 577.50 to 606.38            Start Date : 07 Sep 2016            End Date : 07 Sep 2021            Escalation rate : 10.00            Account code : 1101            COS Account code : 2101            Invoice Description : Service            Billing Period : 7            Billing Cycle : m            Finance Party :            Finance Amount : 0.00            Billing Customer : HCP001            This change was made by : Judith Mudzengi</p>	09 Mar 2017

Open Windows | 17 Jan 2018

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