

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

# CONTRACTS

## **CONTRACTS - HOLD**

A contract is placed on **Hold** due to customer/client reasons. An example of this can be: **non-payment**.

When a contract is placed on hold, the system will prevent call logging, but the customer will still be included in the month end billing.

#### Ribbon Access: Contract > Contracts



- The **Contract Listing** screen will display.
- Select the **Site** that contains the contract you wish to place on Hold.
  - In this example, **Durban** has been selected.



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		C0000028	HAC001	Hack PC - IT Shop		090	Cost Per Copy	Main		29 Jun 20
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		C0000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 20
		C0000044	8070001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 20
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• Upon opening, this screen will default to the **Active** status.

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Note: A contract can only be put on Hold whilst in this status.

• If the screen is open in a **different** status, click on the drop-down **arrow** in this field and select **Active** from the menu.

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			C00000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 20
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#### **SELECT CONTRACT**

- Select the **row** of the contract you wish to place on hold.
- Click on Hold.

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The Contract on Hold: [] screen will open.



#### **ADD HOLD DETAILS**

- **Date**: This will auto populate with the current date.
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
  - Either type in or use the arrow indicators to select an alternative time.
- **Reason**: Type in the reason for putting this contract on hold.
- Est. Release Date: This will auto populate 48 hours after the hold date.
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative release date, if required.
  - Either type in or use the arrow indicators to select an alternative release time, if required.
- **Employee**: Select the name of the employee who has requested to place this contract on hold.



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#### **SAVE HOLD DETAILS**

• When you have finished adding details in this screen, click on **Save**.

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- You will return to the **Contract Listing** screen.
- A **Customer Processing** message box will pop up advising the following:
  - Contract No: [] has been placed on hold.
- Click on Ok.



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			C00000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 201
			C0000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		15 May 201
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### VIEW CONTRACT IN HOLD STATE

- This contract has now been moved from the Active status to the Hold status.
- Select the **Hold** status.

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				CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 20
				CO0000019	OF#001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 3.4 201
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				C0000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 20
				PC0000001	DAV/002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 201
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• You can now view the contract in the Contract Listing screen where the status is set to **Hold**.



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