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

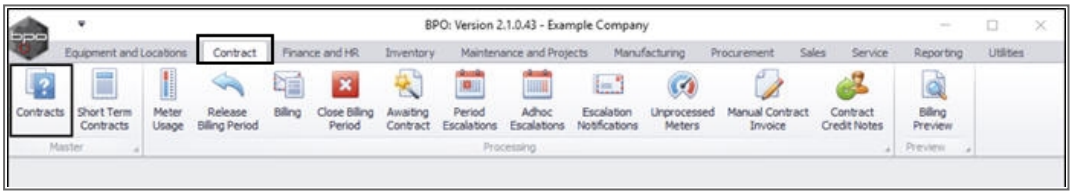
CONTRACT

CONTRACTS – RELEASE FOR APPROVAL

Contracts need to be **released** and **approved**, thereby making them **active**. These active contracts will then be included in the month end billing run and calls can be logged against them.

Follow the process below to **release** a Contract for approval.

Ribbon Access: Contract > Contracts



The **Contract Listing** screen will display.

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

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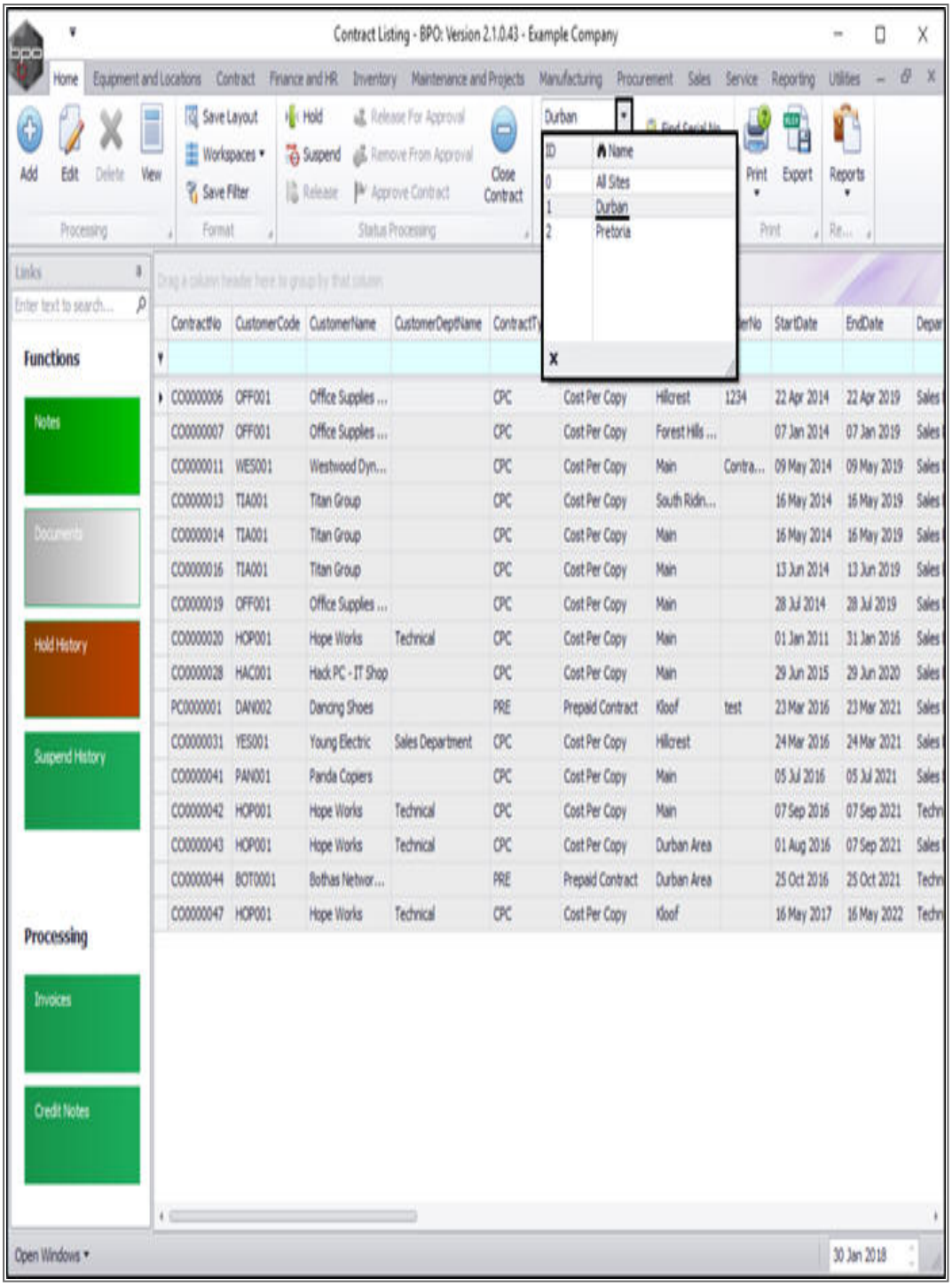

- Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.

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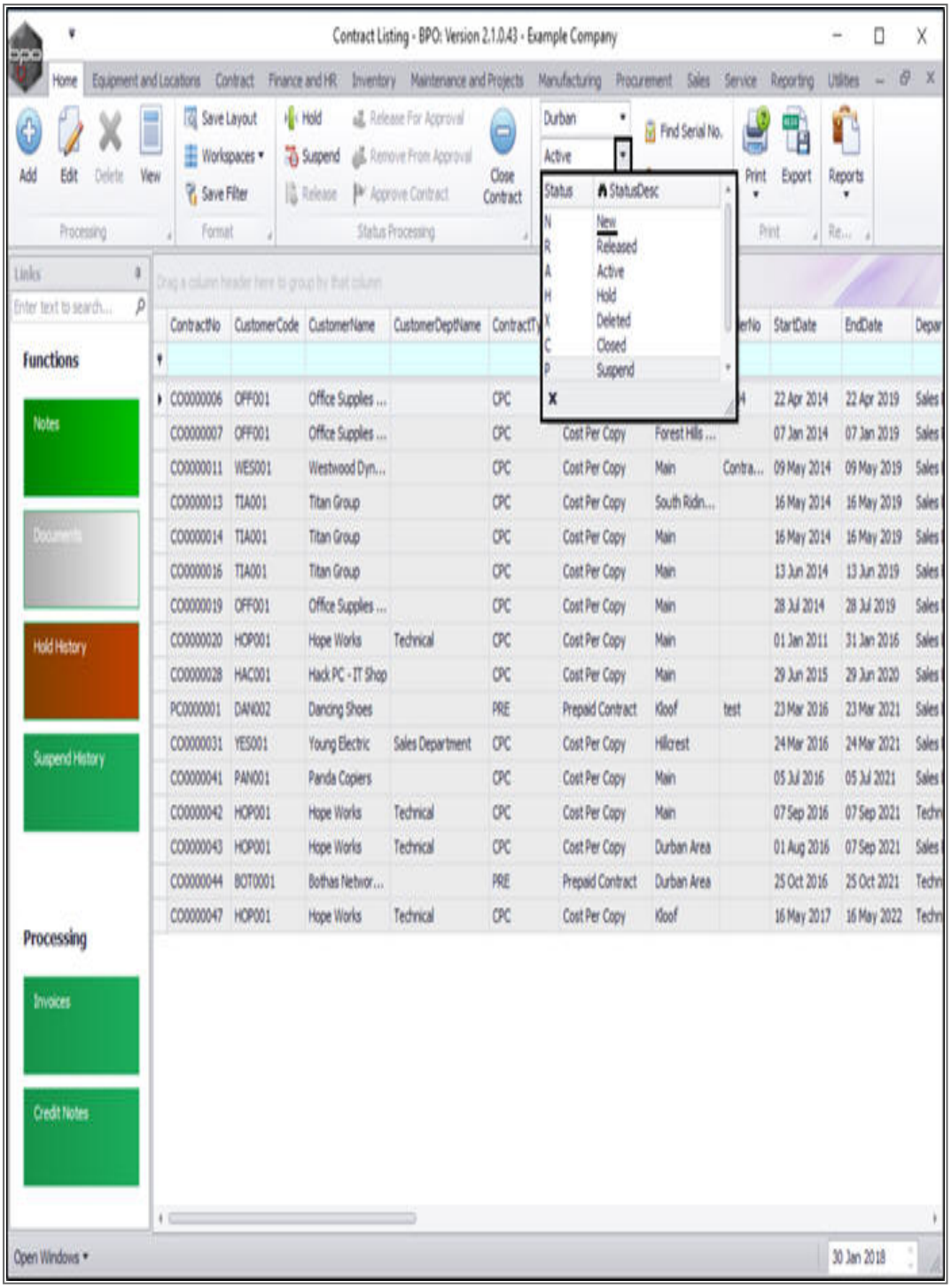
- Click on the **drop-down arrow** in the **Status** field and select the **New** status.



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SELECT CONTRACT

- Select the **row** of the contract you wish to **release**.

RELEASE CONTRACT

- Click on **Release For Approval**.

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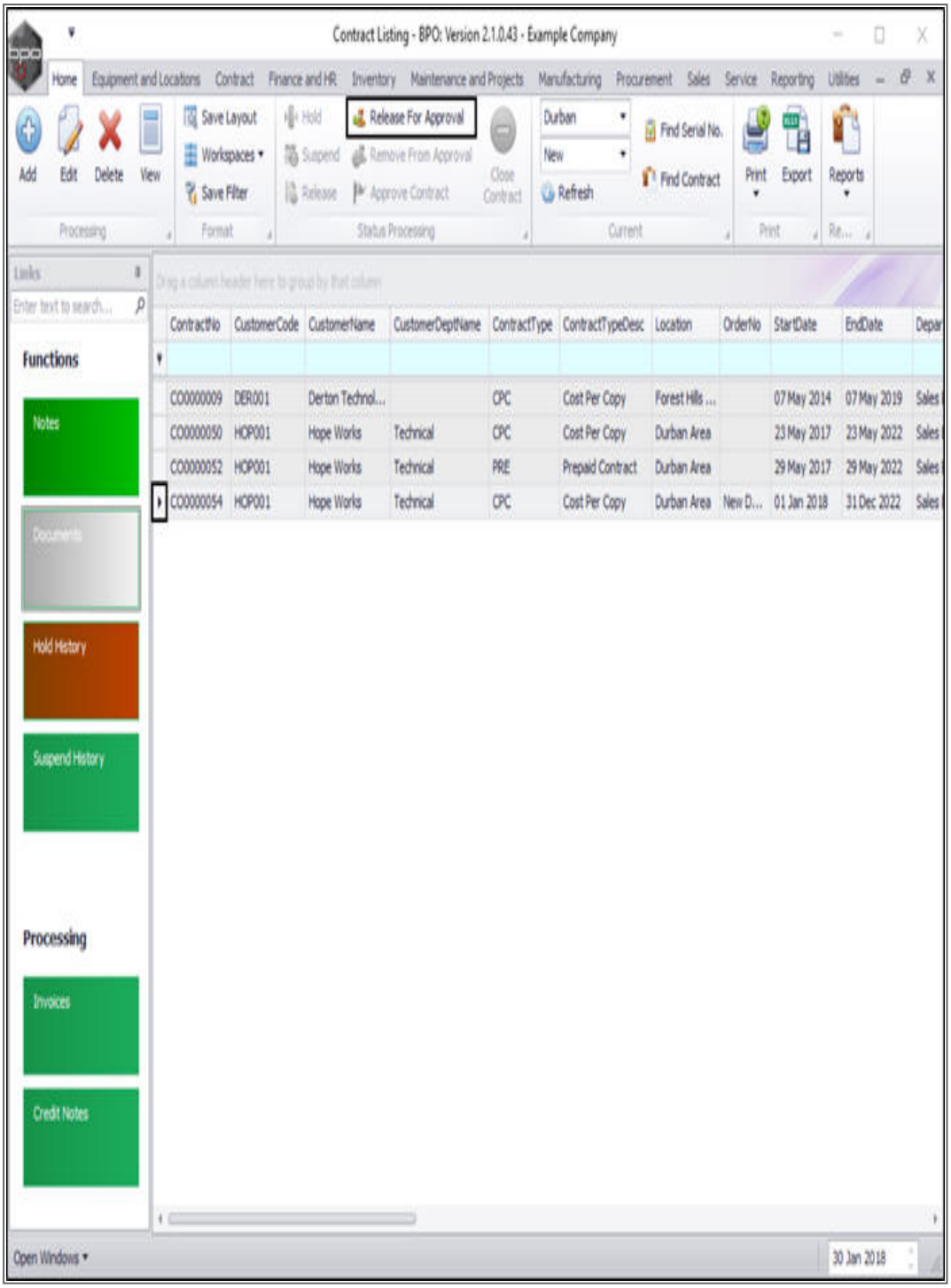

- A **Contract Release** message box will pop up with the following prompt:

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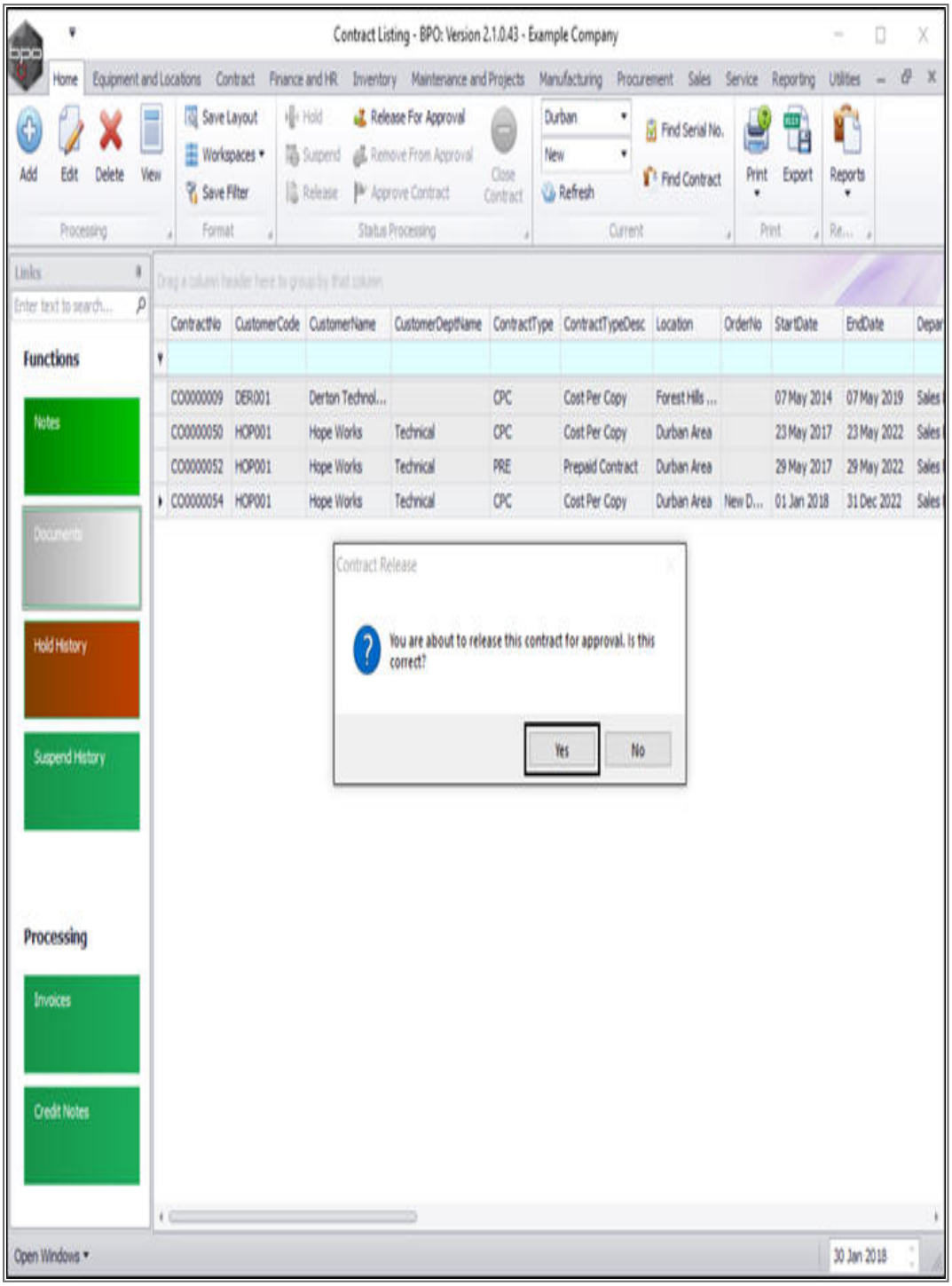
- You are about to release the contract for approval, is this correct?

- Click on **Yes**.



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- A **Contract - Process** message box will pop up advising the following:
    - The contract, no. [] has been released for authorisation successfully.
- Click on **Ok**.

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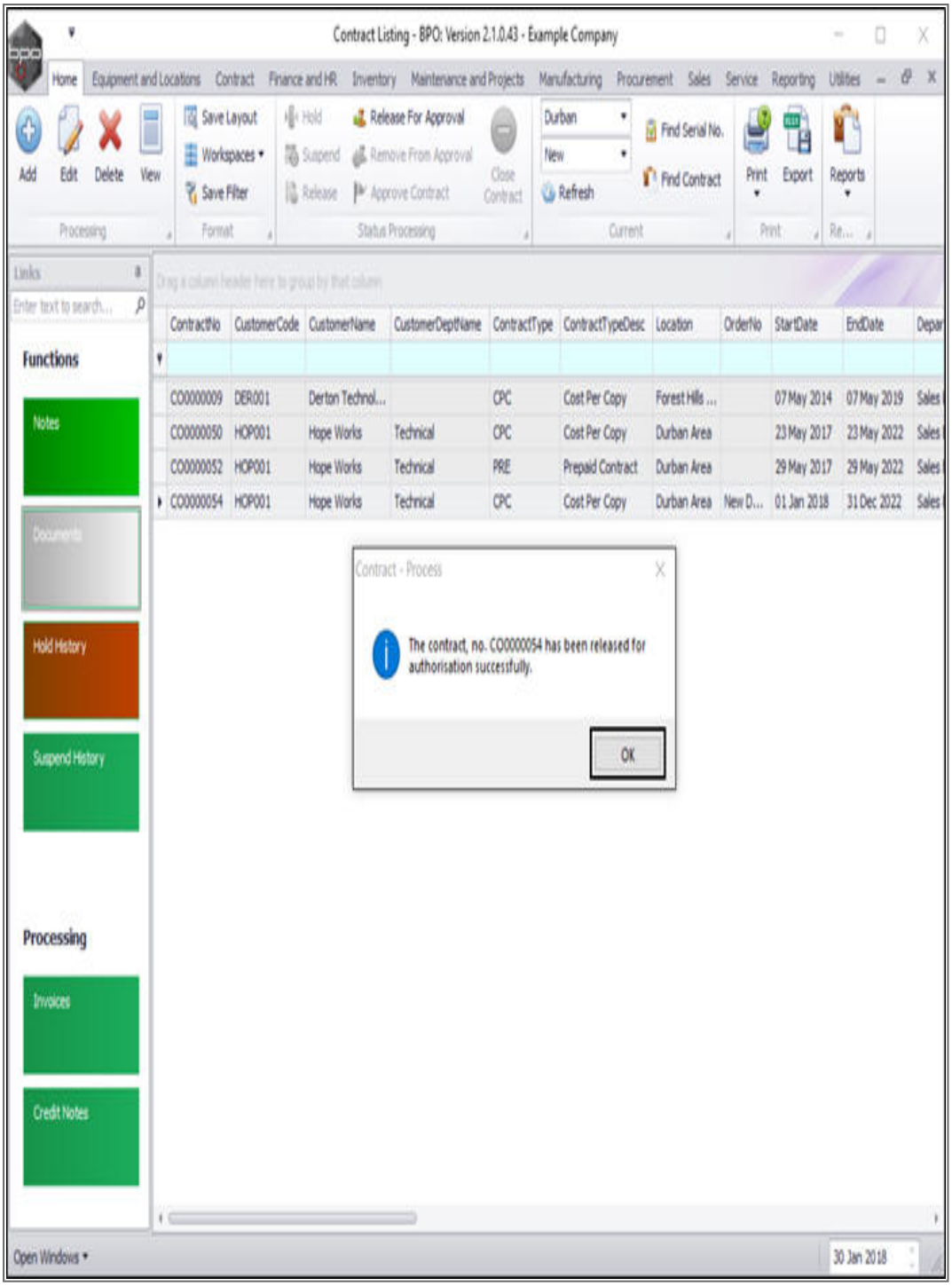

- The contract will now be **removed** from the Contract Listing screen where the status is set to **New**.

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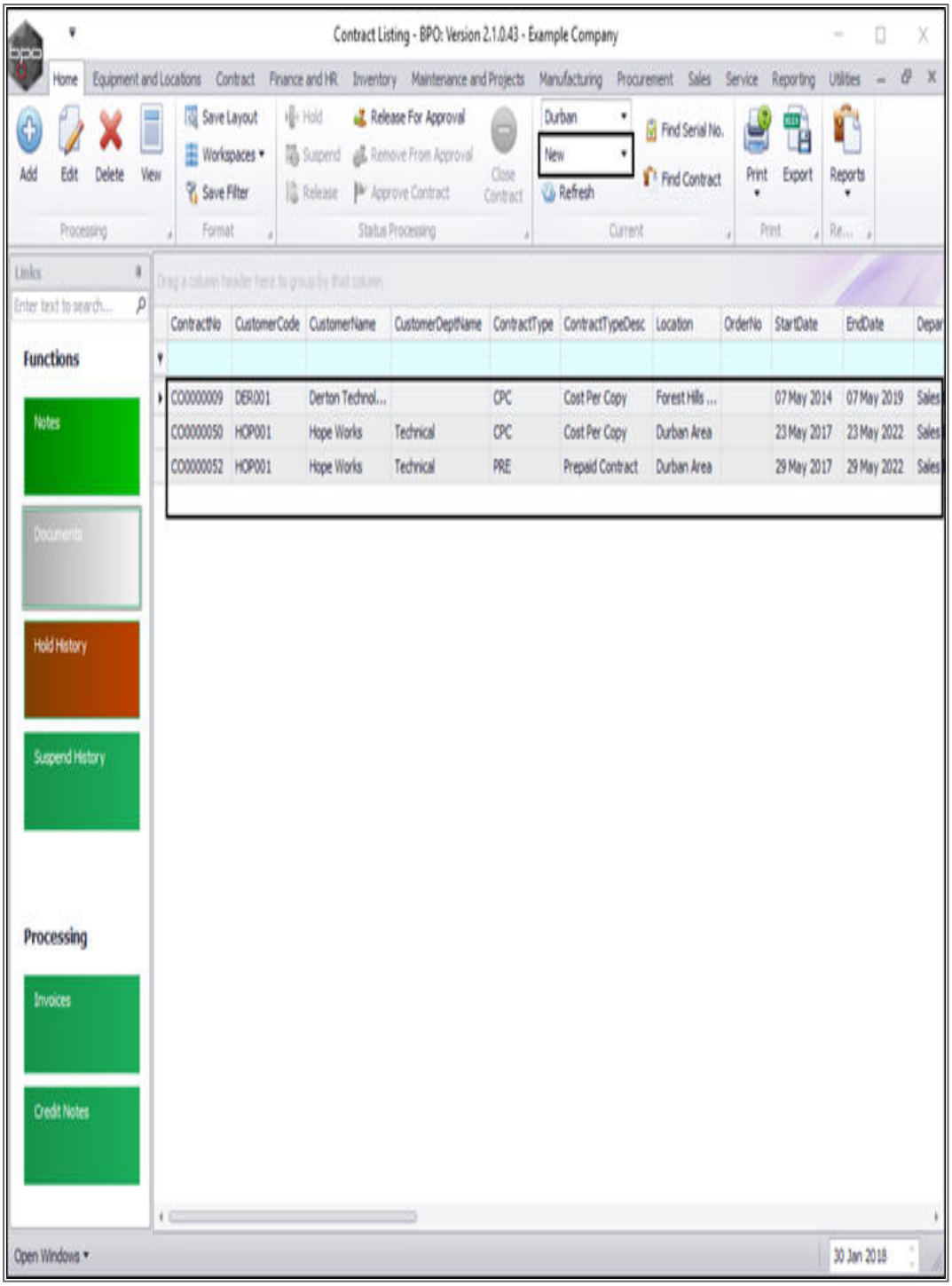

VIEW CONTRACT IN RELEASE STATUS

- Select the **Released** status.

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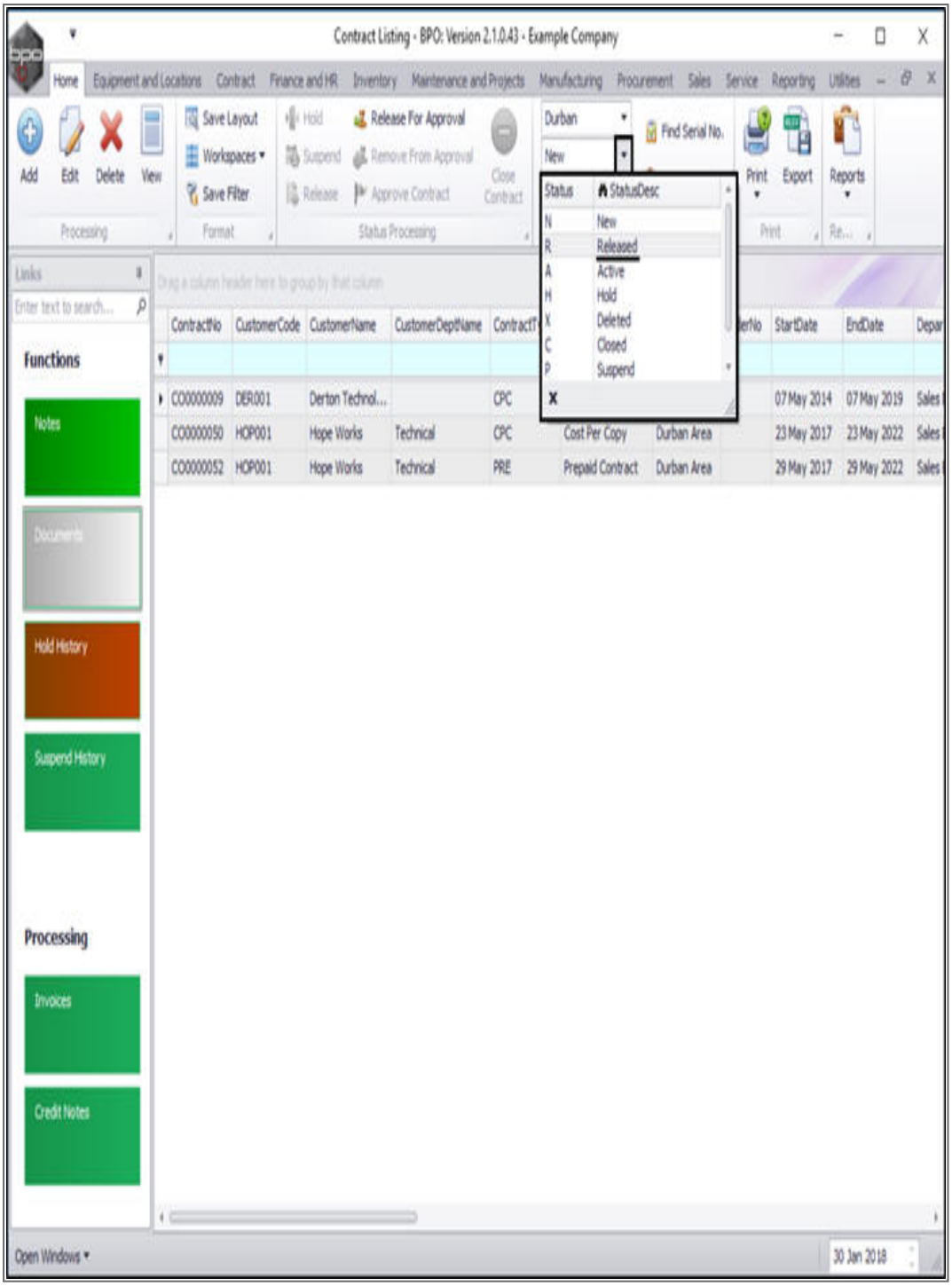

- You can now find the contract in the **Contract Listing** screen where the status is set to **Released**.

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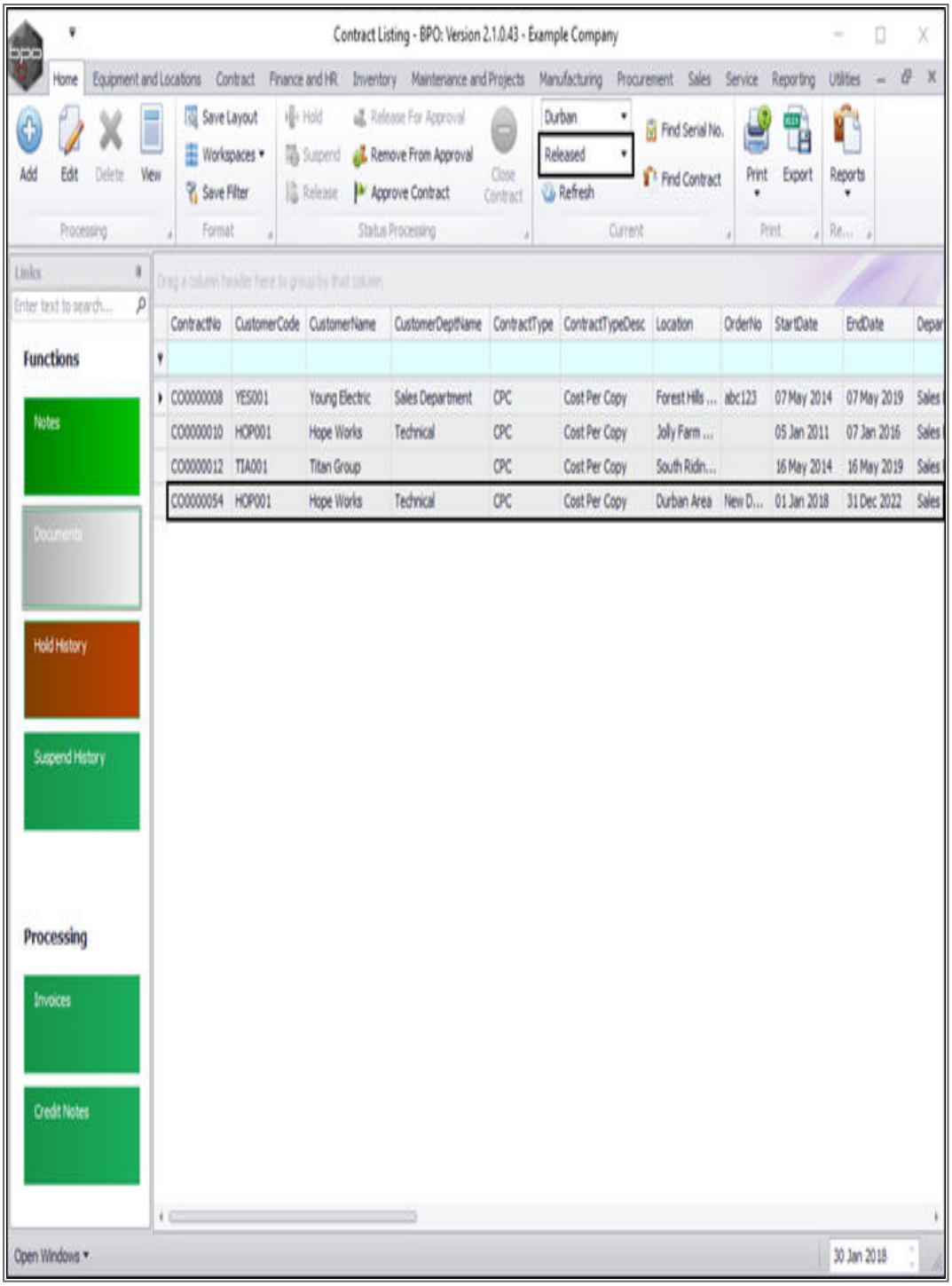

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