

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

CONTRACT

EDIT ITEM METER CHARGES

A contract **item meter** can be edited when the contract is in the **Active** state.

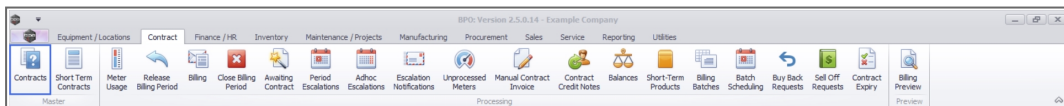
Certain amendments made to the contract **item meter**, will trigger the contract to be moved back to the **Released** state, in order for the contract to be checked and re-**Approved**. An email will then be sent to all users who have the rights to authorise this contract.

These are the changes involved that will trigger the re-approval process:

- If the **Billing Customer** on an Item Fee or Item **Meter** is changed.

Other changes made to the meters to a contract, will **not** trigger the re-approval process.

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.

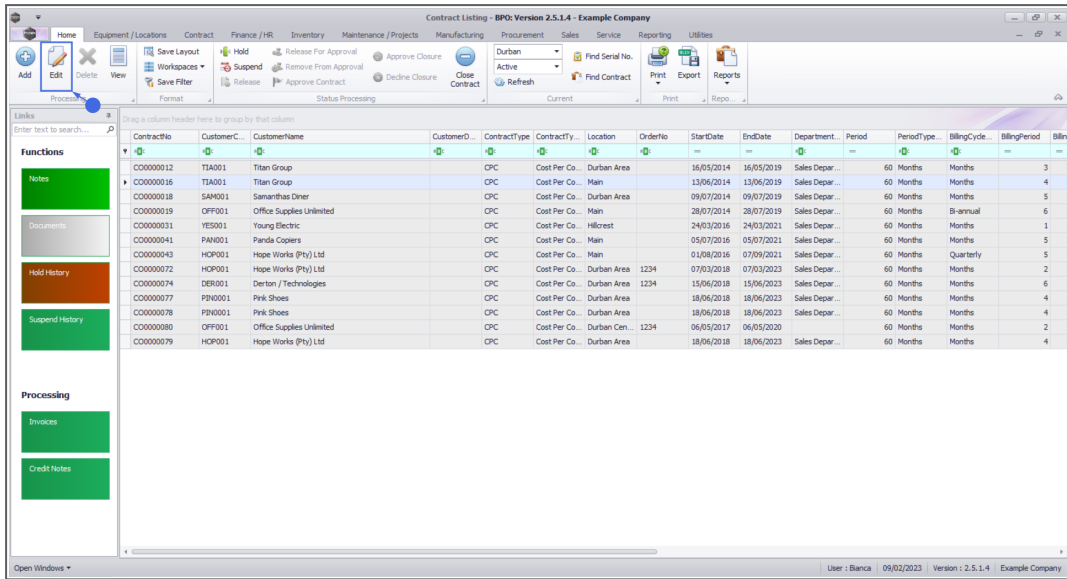
ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractYr	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bills
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months	3		
CO000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	4		
CO000018	SAH001	Samarthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	5		
CO000019	OPF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual	6		
PC000001	DAH002	Dancing Shoes		PRE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	1		
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		
CO000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months	7		
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	5		
CO000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months	3		
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months	0		
CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	2		
CO000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 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	6		
CO000077	PSH001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4		
CO000078	PSH001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	4		
CO000080	OPF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen.	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months	2		
CO000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months	7		
CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 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	4		

SELECT THE CONTRACT

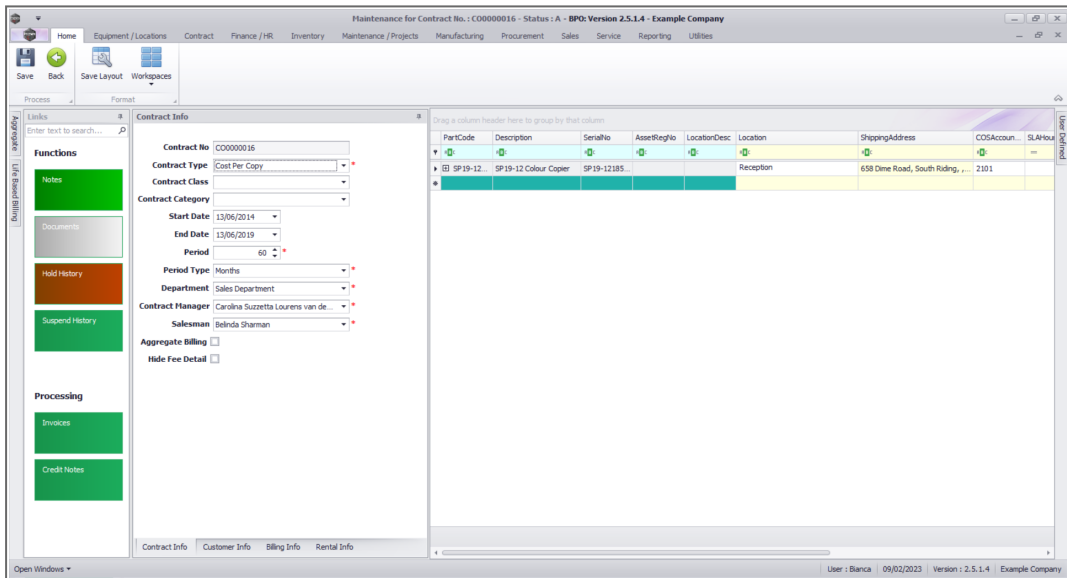
- Select the **row** of the **contract** that you wish to process.

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractYr	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bills
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CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months	4		

- Click on the **Edit** button.



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



SELECT THE ITEM

- Click on the **expand** button in the **row** of the **item** where you wish to edit the **Meter charge**.

Maintenance for Contract No. : CO000043 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Links

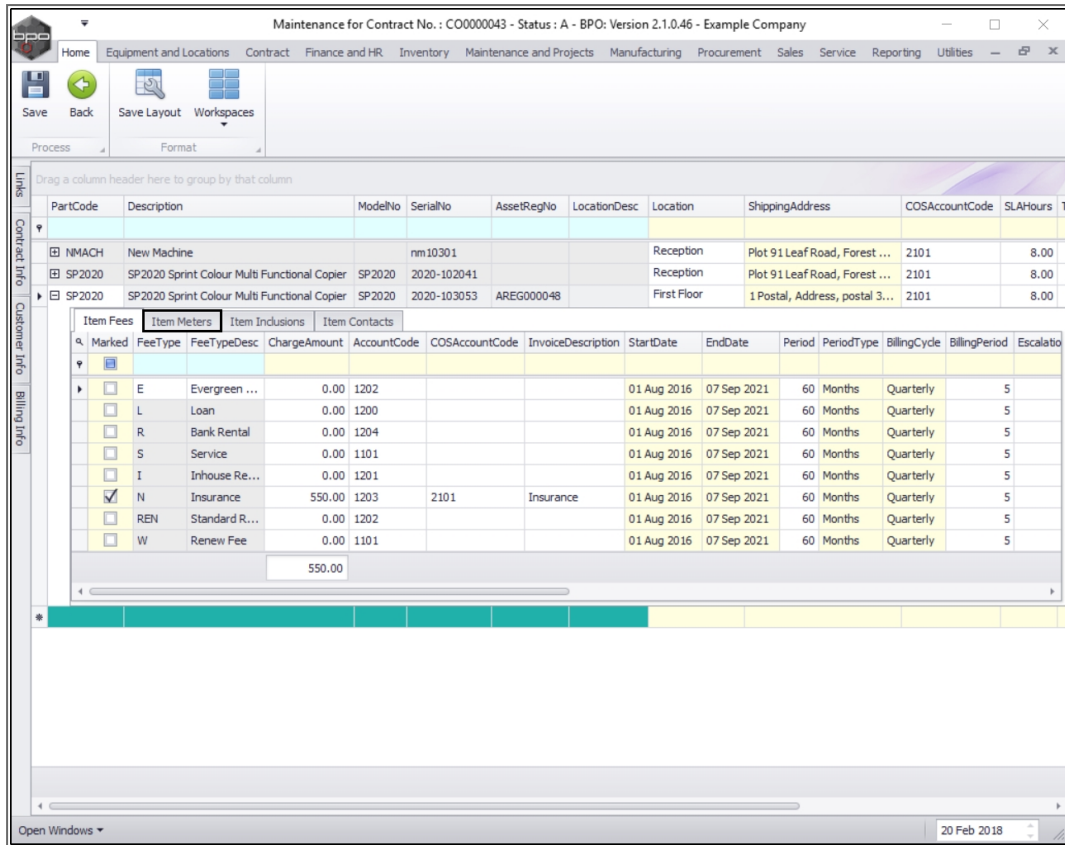
Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	T
NMACH	New Machine		nm10301			Reception	Plot 91 Leaf Road, Forest ...	2101	8.00	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041			Reception	Plot 91 Leaf Road, Forest ...	2101	8.00	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-103053	AREG000048		First Floor	1 Postal, Address, postal 3...	2101	8.00	

Contract Info | Customer Info | Billing Info

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- The **Items** data grid will expand.
- Click on the **Item Meters** tab.



- The **Item Meters** frame will be displayed.

SELECT THE METER

- If there is more than one meter, identify which meter you wish to make changes to, and ensure that you edit the fields in the row of that meter.

[Read this Important Note on Min Billing and Meter Charge Setup](#)

- Type in or use the arrow indicators to make the changes to the **Min Billing** field and **Min Qty** field for minimum billing charges, as required.

Maintenance for Contract No. : CO000043 - Status : A - BPO: Version 2.1.0.46 - Example Company

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Save | Back | Save Layout | Workspaces

Process | Format

Drag a column header here to group by that column

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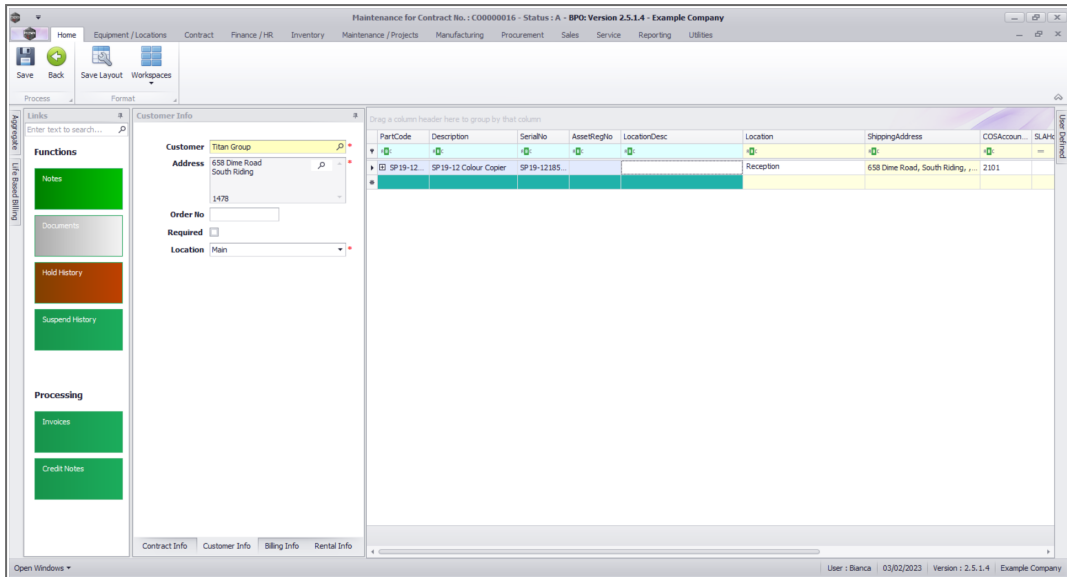
Item Fees	Item Meters	Item Inclusions	Item Contacts	Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccou...	EscalationP...	EscalationT...	EscalationA...	SupplierCode	Supplier
				<input type="checkbox"/>												
	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Mono	0.00	13 Apr 2017	250.00	1000	1101	2101	5	Percentage	10.00		
	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	Colour	0.00	13 Apr 2017	380.00	1000	1101	2101	5	Percentage	10.00		
				<input type="checkbox"/>									Select esc t...			

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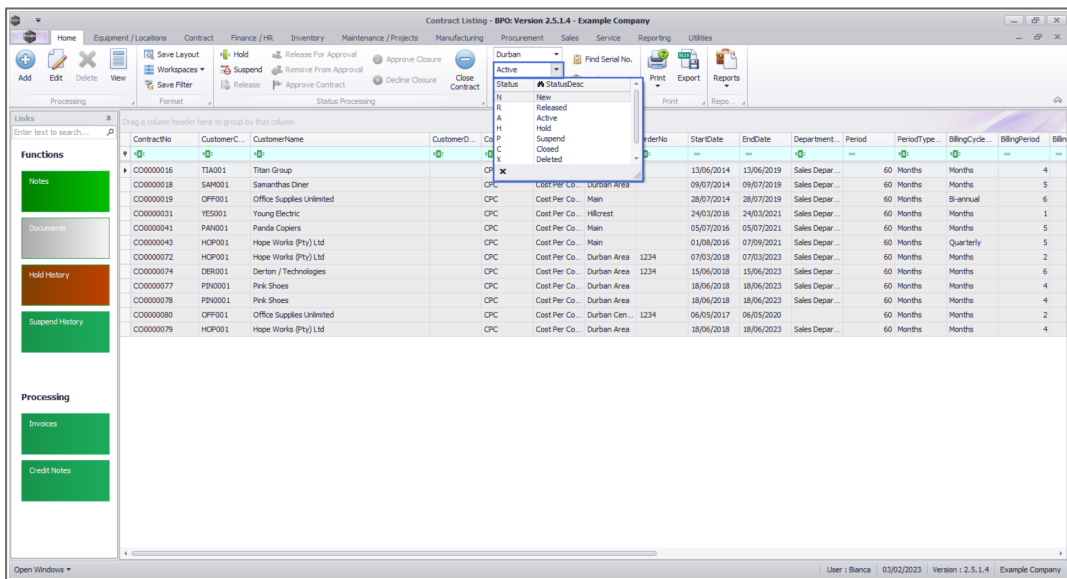
SAVE METER CHARGE CHANGES

SAVE THE CONTRACT

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

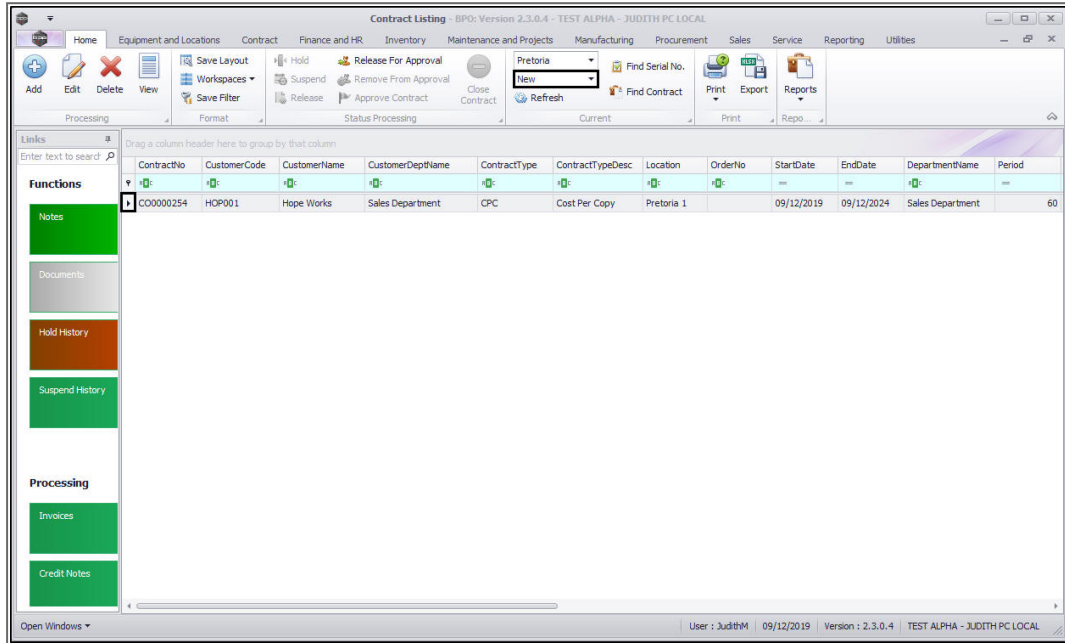


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **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.



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