

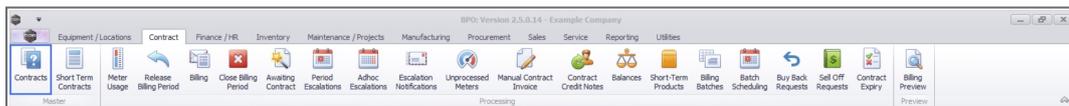
We are currently updating our site; thank you for your patience.

CONTRACT

MINIMUM BILLING AND METER CHARGE SETUP

Minimum billing is an agreed cost between Company and Customer which the company will charge to ensure they can provide for a minimum quality of service and support at all times. Meter charge set up on a contract allows for a specific amount of copies within a set time frame. Monitoring the subsequent meter readings can help keep track of potential over or under usage and adjust the contract accordingly, to better suit the needs of the customer.

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	ContractY	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	TR001	Titan Group		CPC	Cost Per Co.	Man		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	Months	4	
CO000018	SAK001	Samantha 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	B-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	YES001	Young Electric		CPC	Cost Per Co.	Hillcrest		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	APP0001	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	PR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000078	PR0001	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	

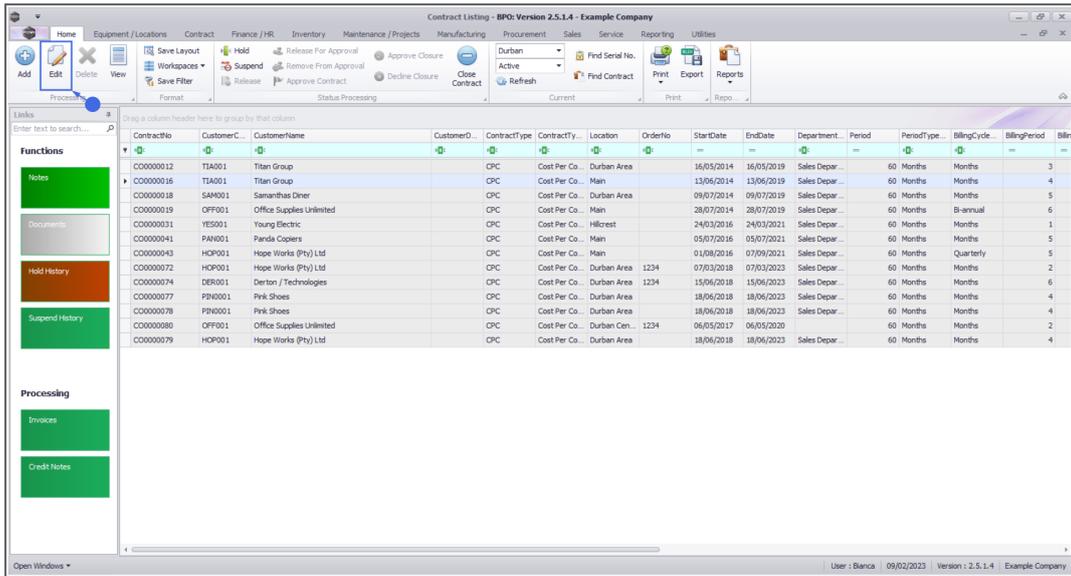
- **Note:** You can **only** set up minimum billing and meter charges when the Contract is in the **Active** state.

SELECT THE CONTRACT

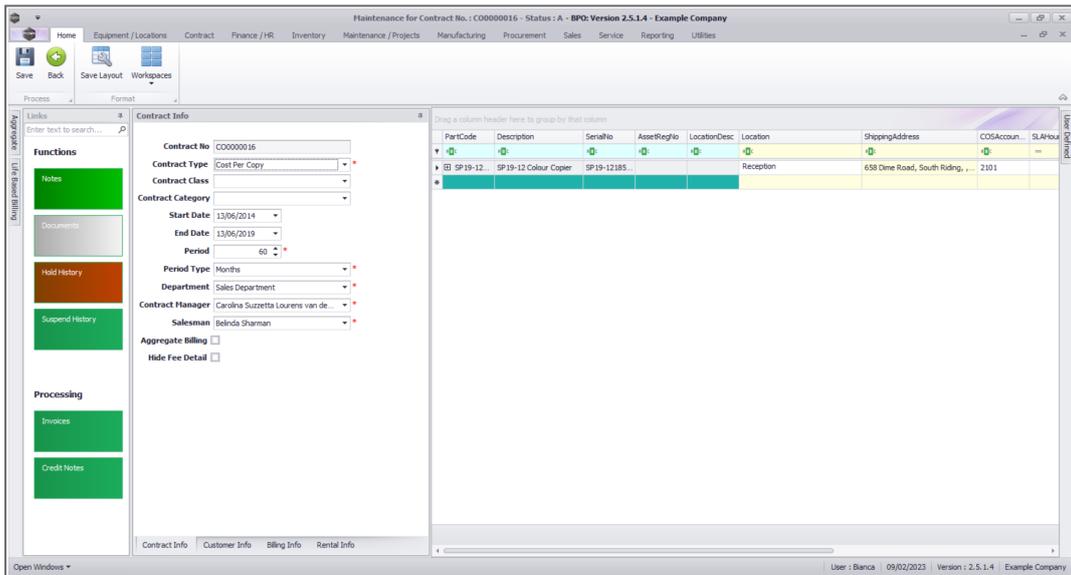
- Select the **row** of the **contract** that you wish to process.

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractY	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	
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PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con...	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months	1	
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CO000054	APP0001	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	PR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO000078	PR0001	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	

- Click on the **Edit** button.

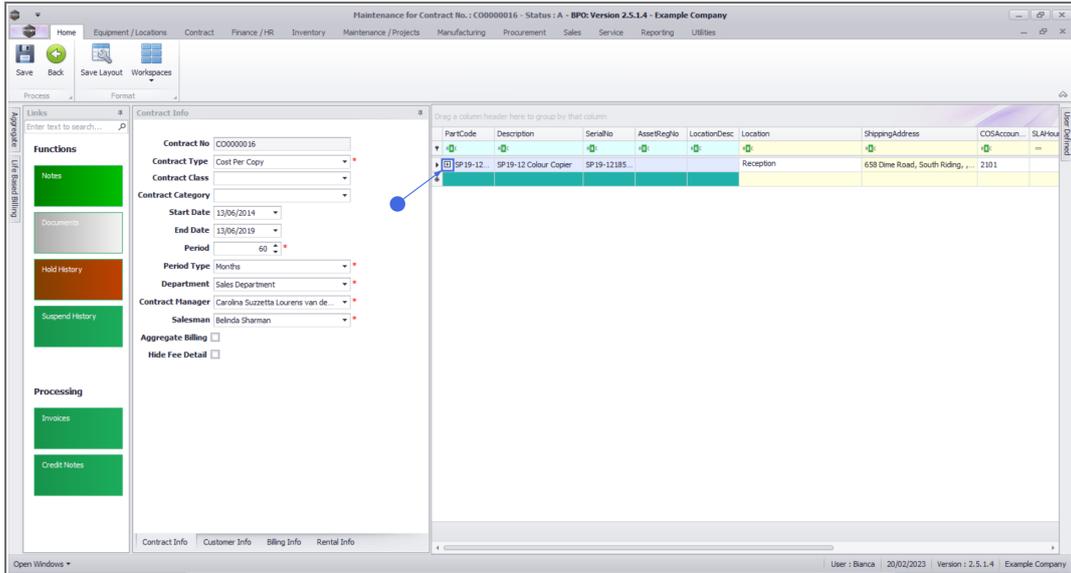


The **Contract Maintenance** screen will be displayed.



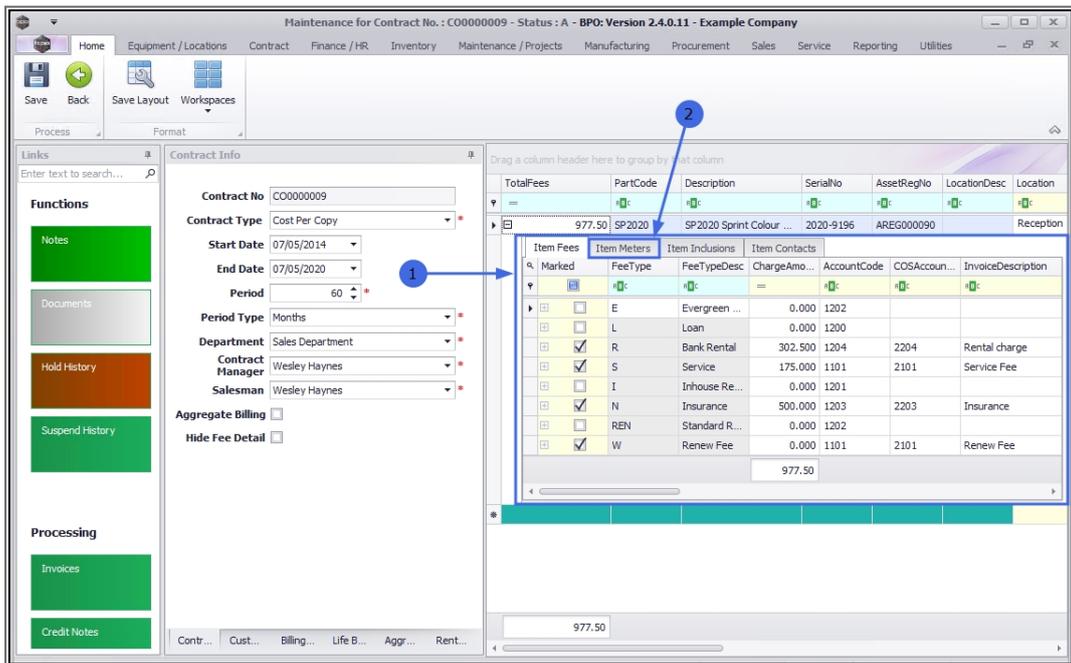
SELECT THE ITEM

- Click on the row of the contract item you wish to work with.



SELECT THE ITEM METER

Click on the **Item Meters** tab.



You can now view the **Item Meters** frame.

VIEW MINIMUM BILLING FIELDS

- Here you can add, edit, and delete minimum billing requirements.

VIEW METER CHARGES

- Click on the **expand** button in the row of an item meter.

The screenshot shows the 'Maintenance for Contract No.: CO0000009 - Status: A - BPO: Version 2.4.0.11 - Example Company' interface. The 'Contract Info' panel on the left shows details for Contract No. CO0000009, Contract Type 'Cost Per Copy', Start Date 07/05/2014, End Date 07/05/2020, Period 60, Period Type 'Months', Department 'Sales Department', Contract Manager 'Wesley Haynes', and Salesman 'Wesley Haynes'. The main data table is titled 'Item Fees' and includes a sub-table for 'Item Meters'. The 'Item Meters' table has columns: Marked, MeterCode, StartReading, ReadingDate, MinBilling, MinQuantity, AccountCode, and COSAccount. The 'Colour' row is expanded, showing a MinBilling of 0.000 and MinQuantity of 0. A blue box highlights the 'Item Meters' section, and a blue arrow points to the 'expand' button in the 'Colour' row. Another blue arrow points to the 'MinBilling' column header.

1. The **Meter Charges** frame will open.
2. Here you can add, edit and delete the required meter charge levels.

When setting up the **From Quantity** in the meter matrix, consider that from quantity **0** to quantity **1** is **1** copy click. Therefore, when setting up a charge level that must bill from (and including) quantity **1001**, the **From Quantity** must be set to **1000**.

Note: If you were to set the **From Quantity** to **1001** this would result in charging from (and including) copy click 1002.

Minimum Billing Setup		Copy Clicks Translated		Notes
Min Qty	Min Billing	From	To	
1000	R250.00	0	1000	
Meter Charge Matrix Setup		Copy Clicks Translated		Notes
From Qty	Unit Charge (cents)	From & Including	To & Including	
0	0	0	1000	Redundant line – this is covered by the min billing
1001	30	1002	2000	Will bill from and including 1002 instead of 1001
2001	35	2002	3000	Will bill from and including 2002 instead of 2001
3001	40	3002	4000	Will bill from and including 3002 instead of 3001
4001	50	4002	onwards	Will bill from and including 4002 instead of 4001

CORRECT METER CHARGE SETUP

Below are **3** different examples for meter charge setup, and the usage calculations, which you can review, to ensure that your meter charges are set up correctly.

1. The first table indicates the meters as set up in BPO, and how this translates to copy clicks.
2. The second table shows the usage charge calculation, based on an example usage for a month.

3. The third image is how the above table information will look in BPO2.

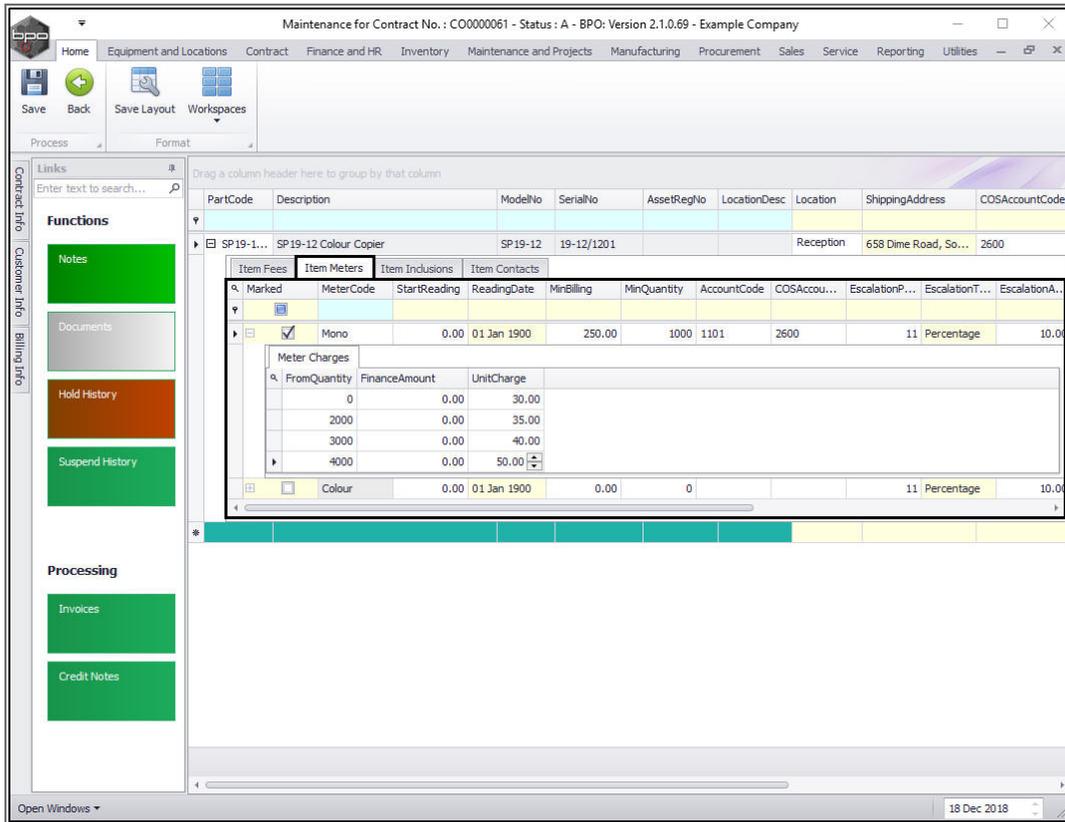
Example 1.1: Meter Charge Setup with Minimum Billing

Minimum Billing Setup		Copy Clicks Translated as	
Min Qty	Min Billing	From	To
1000	R250.00	0	1000
Meter Charge Matrix Setup		Copy Clicks Translated as	
From Qty	Unit Charge (cents)	From & Including	To & Including
0	30	1001	2000
2000	35	2001	3000
3000	40	3001	4000
4000	50	4001	onwards

Example 1.2: Meter Billing Calculation Example, e.g., Usage = 4500

From Copy	To Copy	Unit Charge	Usage	Charge
0	1000	Min Bill	1000	R250.00
1000	2000	R0.30	1000	R300.00
2000	3000	R0.35	1000	R350.00
3000	4000	R0.40	1000	R400.00
4000	4500	R0.50	500	R250.00
Total Charge (excl VAT):				R1550.00

Example 1.3: how the above table information will look in BPO2.



Example 2.1: Meter Charge Setup with Free Minimum Billing

Minimum Billing Setup		Copy Clicks Translated as	
Min Qty	Min Billing	From	To
1000	0	0	1000
Meter Charge Matrix Setup		Copy Clicks Translated as	
From Qty	Unit Charge (cents)	From & Including	To & Including
0	5	1001	5000
5000	12	5001	onwards

Example 2.2: Meter Billing Calculation Example, e.g., Usage = 5200

From Copy	To Copy	Unit Charge	Usage	Charge
0	1000	Min Bill	1000	R0.00
1000	5000	R0.05	4000	R200.00
5000	5200	R0.12	200	R24.00
Total Charge (excl VAT):				R224.00

Total Charge (excl VAT): R70.00

Example 3.3: how the above table information will look in BPO2.

The screenshot displays the BPO2 software interface for 'Maintenance for Contract No.: CO000061 - Status: A - BPO: Version 2.1.0.69 - Example Company'. The main data table is as follows:

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode
SP 19-1...	SP 19-12 Colour Copier	SP 19-12	19-12/1201		Reception	658 Dime Road, So...	2600	

The 'Item Meters' sub-table is expanded for the 'Mono' item:

Marked	MeterCode	StartReading	ReadingDate	MinBilling	MinQuantity	AccountCode	COSAccou...	EscalationP...	EscalationT...	EscalationA...
<input checked="" type="checkbox"/>	Mono	0.00	01 Jan 1900	0.00	0	1101	2600	11	Percentage	10.00

The 'Meter Charges' sub-table for the 'Mono' item is also expanded:

FromQuantity	FinanceAmount	UnitCharge
0	0.00	4.00
1000	0.00	10.00

The 'Colour' item is also listed in the main table:

<input type="checkbox"/>	Colour	0.00	01 Jan 1900	0.00	0			11	Percentage	10.00
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