

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

CONTRACT

AWAITING CONTRACT

This screen displays items that have been processed but still need to be linked to a new or existing contract. The items displayed can be:

- A or B-class internal assets issued (New Deal Rental)
- A or B-class serialised stock invoiced and issued (New Deal Sale)
- A or B-class customer assets.

Ribbon Access: Contract > Awaiting Contract



The Items Awaiting Contract listing screen will be displayed.

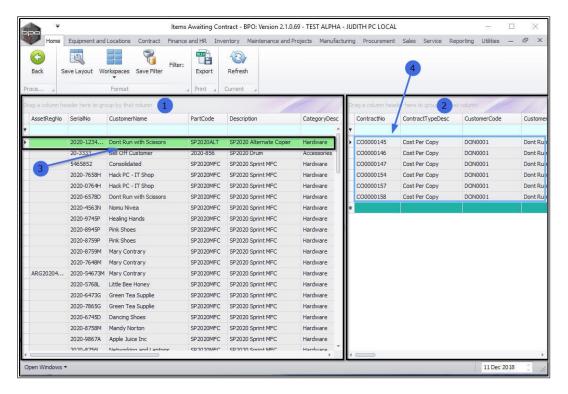
SCREEN OVERVIEW

The screen is divided into **2** data grids.

- Data grid 1: displays all the items waiting to be allocated to a contract. These items can either be <u>customer assets</u> or<u>internal assets</u>. For internal assets to be displayed, a New Deal Rental process has to be completed first.
- 2. Data grid 2: displays all the existing contracts for the customer linked to the machine serial no. selected in data grid 1.



- 3. For example in this image, a machine with serial no: **2020-12341IA** linked to customer **Don't Run with Scissors** is selected in data grid 1,
- 4. Therefore **all** contracts linked to customer **Don't Run with Scissors** are displayed in data grid 2.
 - Note: Deleted or Closed contracts will <u>not</u> be displayed in this data grid.

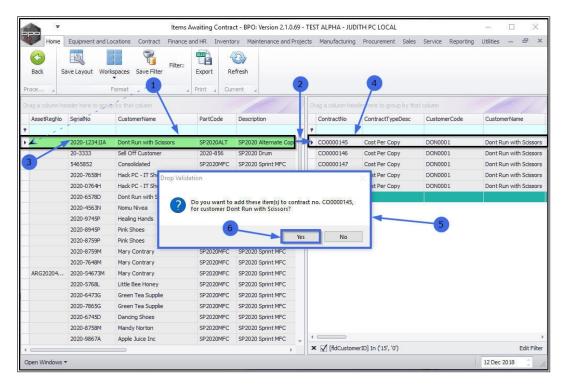


LINK SINGLE ITEM TO EXISTING CONTRACT

- 1. Click and hold on the contract item in data grid 1.
 - Note: You may need to click and hold from the <u>row selector</u> <u>column</u> in the row.
- 2. Drag the contract item to an existing contract displayed in data grid **2**.
- 3. In this example, serial no. **2020-12341IA** has been selected, and will be dragged and dropped onto
- 4. Contract no. CO0000145.



- 5. As it is 'dropped', a **Drop Validation** message box will pop up asking;
 - Do you want to add these items(s) to contract no. [], for customer []?
- 6. Click on Yes.



The Maintenance for Contract No.: [] screen will open.

ADD ITEMS DETAILS/FEES

- 1. The contract item you have added will be listed last in the **Parts** data grid.
- 2. The **Items** frame sub grids linked to this part will be auto expanded and displayed, ready for adding information:
 - Item Fees
 - Item Meters
 - Item Inclusions
 - Items Contacts



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- 1. Scroll right in the row of the contract item to view more information.
- 2. You can update/edit the following fields:
 - Link a Location
 - Link a Shipping Address
 - Link a COS Account Code
 - Link a SLA Hours
 - Link a Travel Radius
 - Link a Travel Charge



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- 1. When you have added the Contract Item and Item Fee information as required,
- 2. You can move across to the Contract Information frames: Contract Info Panel, Customer Info Panel and Billing Info Panel. These can be left as is, unless a particular change has been requested and you are authorised to do so.

SAVE SINGLE LINKED ITEM



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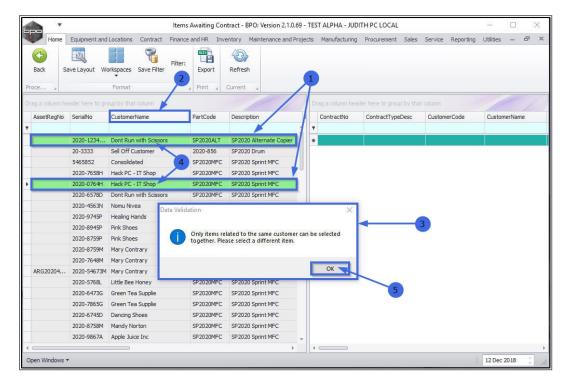
• The linked item will be **saved** to the contract and you will return to the **Items Awaiting Contract** screen.

LINK MULTIPLE ITEMS TO EXISTING CONTRACT

- 1. In the **Items Awaiting Contract** screen, select the multiple items in data grid **1** that you wish to be linked to an existing contract.
 - In order to be able to select <u>more than one item</u> on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.
- 2. **Important Note:** The items selected have to belong to the <u>same</u> customer.
- If you select items belonging to <u>different</u> customers then a Data Validation message box will pop up advising you that;
 - Only items related to the same customer can be selected together. Please select a different item.



- 4. In this example an item linked to customer **Don't Run with Scissors** and another item linked to customer **Hack PC IT Shop** have been incorrectly selected.
- 5. Click on **OK** to clear the message and restart the selection.



- 1. Select all the contract items that you wish to link.
- 2. Drag the items to an existing contract in data grid 2.
- 3. In this image, serial no **2020-00038** and **2020-6578D** have been selected, dragged and dropped on to contract no **CO0000146**.
- 4. A Drop Validation message box will pop up asking;
 - Do you want to add these items(s) to contract no. [] for customer []
- 5. Click on Yes.



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The Maintenance for Contract No [] screen will be displayed.

ADD ITEM DETAILS/FEES

- 1. The items you are adding to the contract will be listed last in the **Parts** data grid.
- 2. The **Items sub grids** linked to these parts will be auto expanded and displayed ready for adding information:
 - Items Fees
 - Item Meters
 - Item Inclusions
 - Items Contacts



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- 1. Scroll right to view all the contract item information.
- 2. You can update/edit the following fields:
 - Link a Location
 - Link a Shipping Address
 - Link a COS Account Code
 - Link a SLA Hours
 - Link a Travel Radius
 - Link a Travel Charge



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- 1. You can input relevant data for the Parts (Equipment Item) frame.
- 2. Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.

SAVE MULTIPLE LINKED ITEMS



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LINK SINGLE ITEM TO A NEW CONTRACT

- In the Items Awaiting Contract screen, click on the single item in data grid 1 that you wish to add to a new contract
- 2. Drag the item to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
- 3. In this example, serial no **2020-777H** has been selected, dragged and dropped to
- 4. the final **blank row** in data grid **2**.
- 5. A Drop Validation message box will pop up asking;
 - Do you want to add these items(s) to a new contract?
- 6. Click on Yes.



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- 1. The Select a contract type for the new contract screen will pop up.
- 2. Click anywhere in the row of the contract type you wish to add.
- 3. Click on OK.
 - In this image, CPC Cost Per Copy has been selected



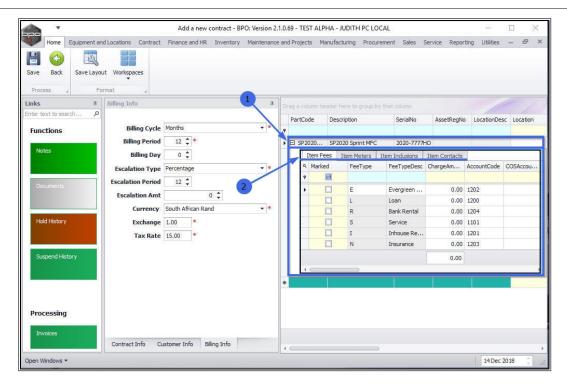
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The Add a new contract screen will be displayed.

ADD ITEM DETAILS/FEES

- 1. The item you are adding to the new **contract** will be listed in the **Parts** data grid.
- 2. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - Items Fees
 - Item Meters
 - Item Inclusions
 - Items Contacts





- 1. Scroll right to view all the contract item information.
- 2. You can update/edit the following fields:
 - Link a Location
 - Link a Shipping Address
 - Link a COS Account Code
 - Link a SLA Hours
 - Link a Travel Radius
 - Link a Travel Charge



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- 1. You can input relevant data for the Part Item frame.
- 2. Add the **new** contract details to the; Contract Info Panel, Customer Info Panel and Billing Info Panel panels.

SAVE LINKED ITEM



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- The item will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the Items Awaiting Contract listing screen.

LINK MULTIPLE ITEMS TO A NEW CONTRACT

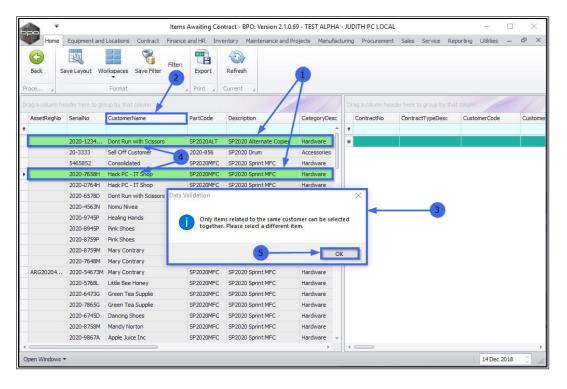
 In the Items Awaiting Contract screen, select the multiple items in data grid 1 that you wish to link to a new contract.

> In order to be able to select <u>more than one item</u> on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

- 2. **Important Note:** The items selected have to belong to the **same** customer.
- If you select items belonging to <u>different</u> customers then a Data Validation message box will pop up advising you that;



- Only items related to the same customer can be selected together. Please select a different item.
- In this example an item linked to customer Don't Run with Scissors and another item linked to customer Hack PC - IT Shop have been incorrectly selected.
- 5. Click on **OK** to clear the message and restart the selection.



- As you select the second item line linked to the <u>same</u> customer, the system will auto filter the item lines in data grid 1, to display <u>only</u> the items linked to that customer.
- 2. **Drag** the items to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
- 3. In this image, serial no's **2020-12341IA**, **2020-6578D** and **2020-00038** have been selected, dragged and dropped on to
- 4. the final **blank row** in data grid **2**.
- 5. A Drop Validation message box will pop up asking;
 - Do you want to add these items(s) to a new contract?



6. Click on Yes.

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- 1. The Select a contract type for the new contract screen will pop up.
- 2. Click anywhere in the row of the contract type you wish to add.
- 3. Click on OK.
 - ° In this image, **CPC** Cost Per Copy has been selected.



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- 1. The Add a new contract screen will be displayed.
- The items that you are adding to the **new** contract will be listed in the Parts data grid.

ADD ITEM DETAILS/FEES

- 1. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - Items Fees
 - Item Meters
 - Item Inclusions
 - Items Contacts



Awaiting Contract

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- 1. Scroll right to view all the contract items information.
- 2. You can update/edit the following fields:
 - Link a Location
 - Link a Shipping Address
 - Link a COS Account Code
 - Link a SLA Hours
 - Link a Travel Radius
 - Link a Travel Charge



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- 1. You can input relevant data for the Parts Item frames.
- 2. Add the **new** contract details to the; Contract Info Panel, Customer Info Panel and Billing Info Panel panels.

SAVE MULTIPLE LINKED ITEMS



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- The items will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the Items Awaiting Contract listing screen.

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