

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

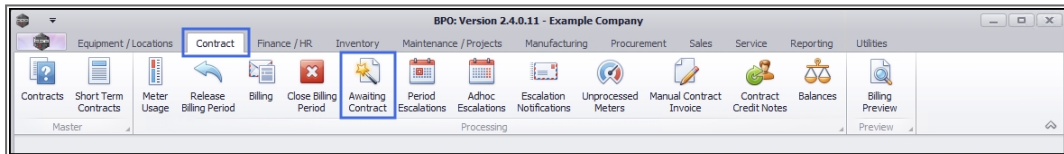
CONTRACT

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.

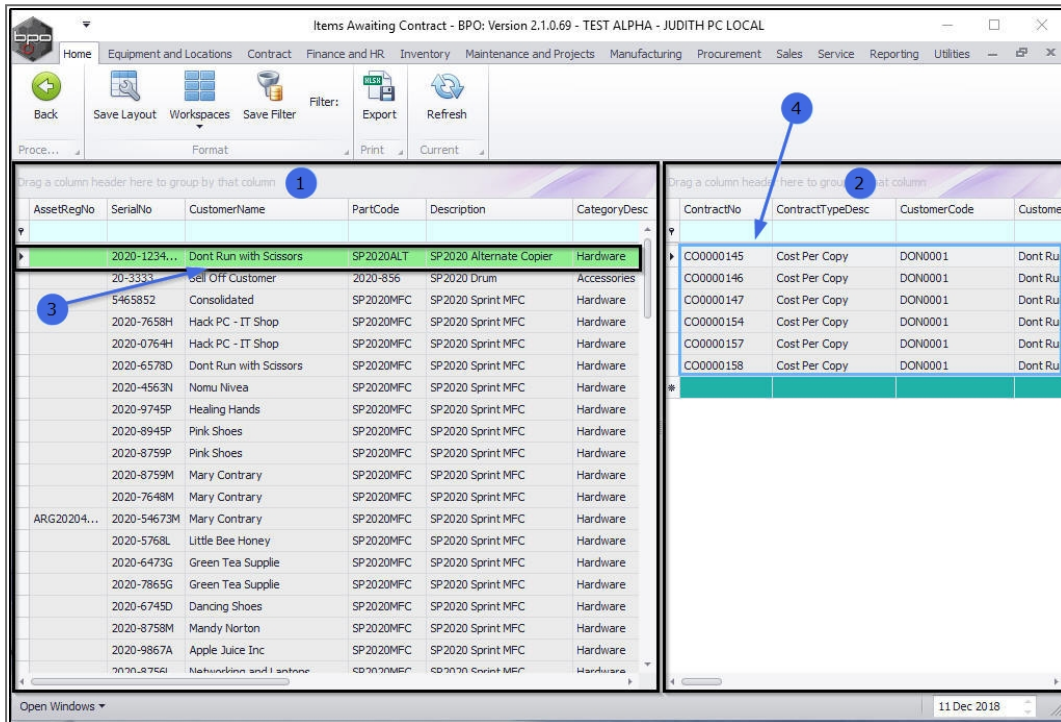
SCREEN OVERVIEW

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

1. **Data grid 1:** displays all the items **waiting** to be allocated to a contract. These items can either be [customer assets](#) or [internal assets](#). 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.

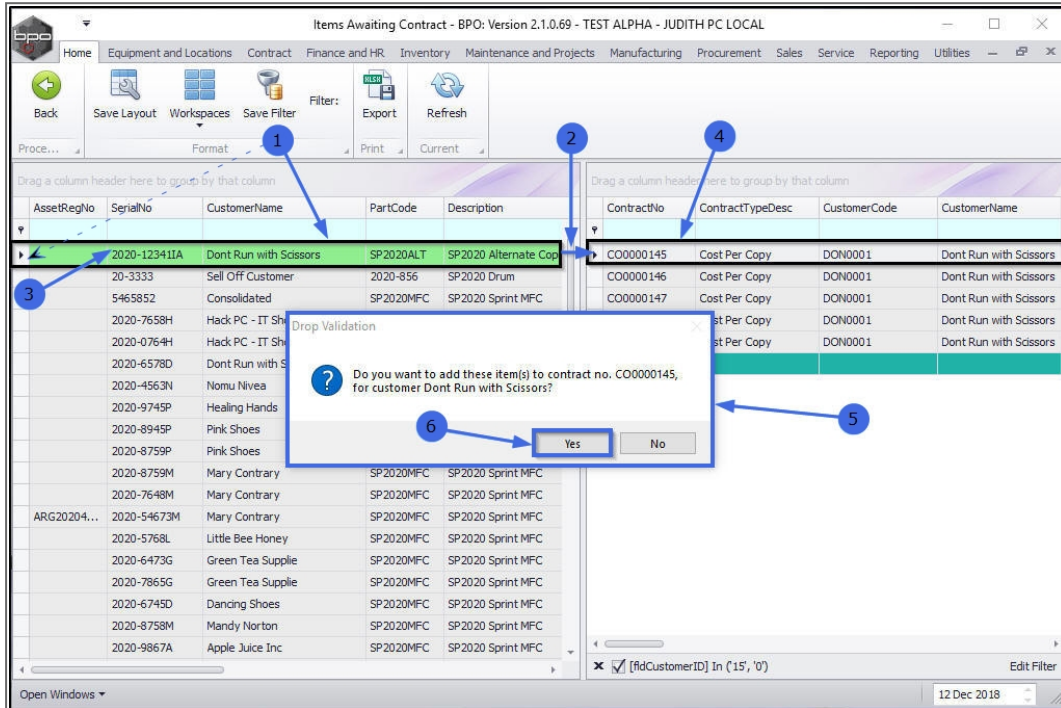
- **Note:** Deleted or Closed contracts will not be displayed in this data grid.



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 row selector column 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**.

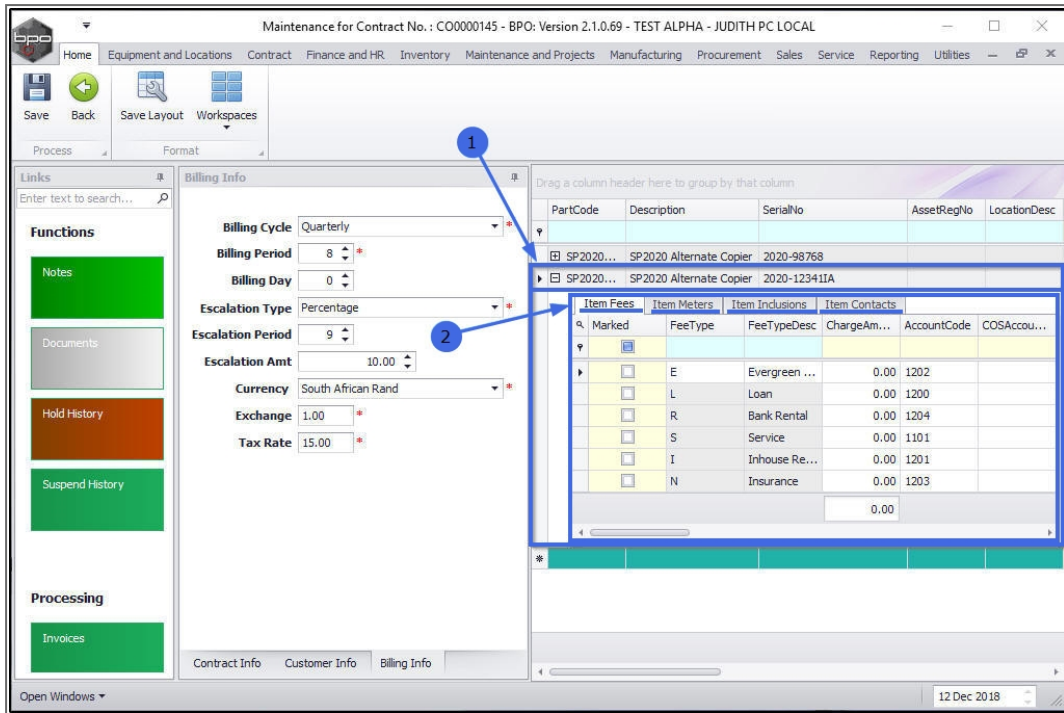
5. As it is 'dropped', a **Drop Validation** message box will pop up asking;
 - **Do you want to add these items(s) to contract no. [], for customer []?**
6. Click on **Yes**.



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

ADD ITEMS DETAILS/FEES

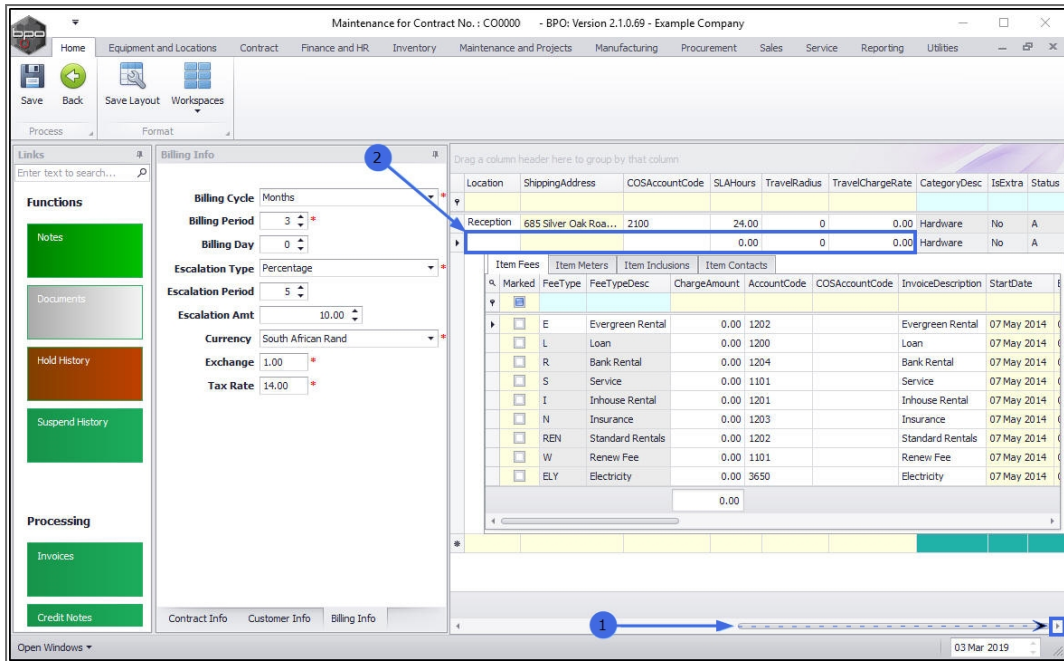
1. The contract item you have added will be listed last in the **Parts** data grid.
2. The **Items** frame sub grids - linked to this part - will be auto expanded and displayed, ready for adding information:
 - **Item Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. **Scroll right** in the row of the contract item to view more information.

2. You can update/edit the following fields:

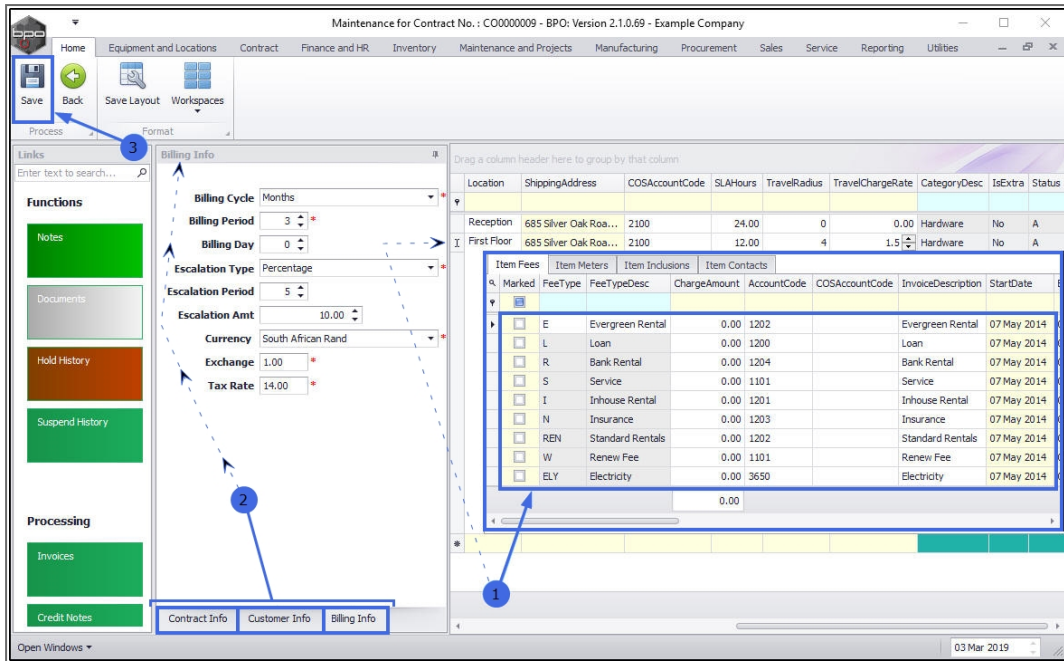
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



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

3. Click on **Save**.

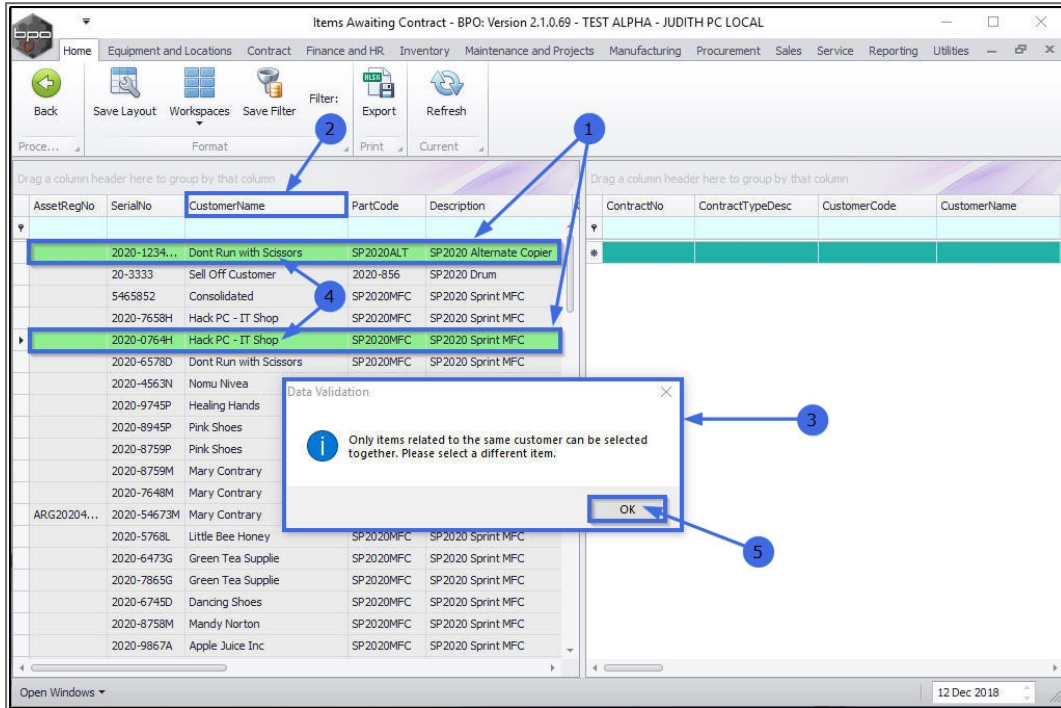


- The linked item will be **saved** to the contract and you will return to the **Items Awaiting Contract** screen.

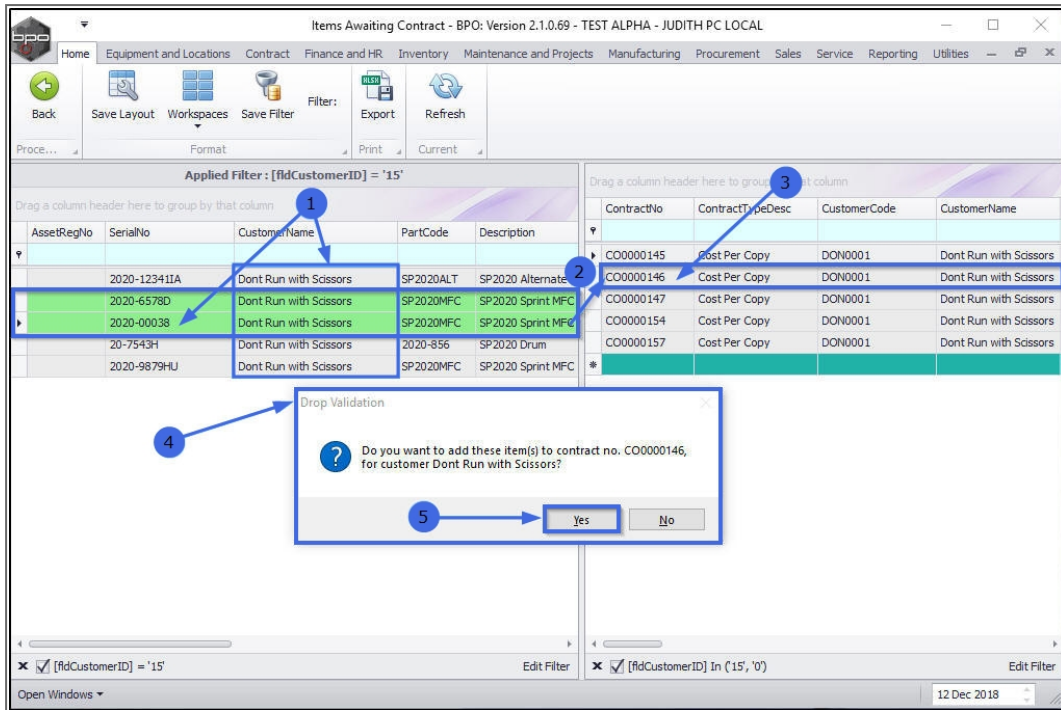
LINK MULTIPLE ITEMS TO EXISTING CONTRACT

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 more than one item 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.
3. If you select items belonging to different 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.



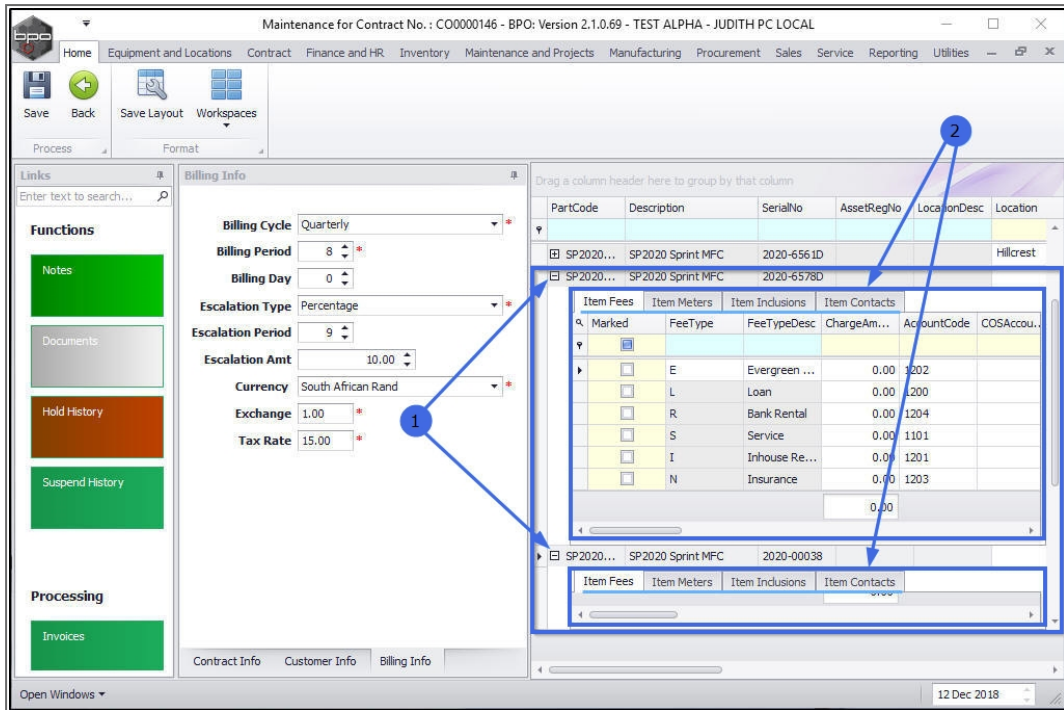
1. Select all the contract items that you wish to link.
2. **Drag** the items to an existing contract in data grid 2.
3. In this image, serial no **2020-00038** and **2020-6578D** have been selected, dragged and dropped on to contract no **CO0000146**.
4. A **Drop Validation** message box will pop up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



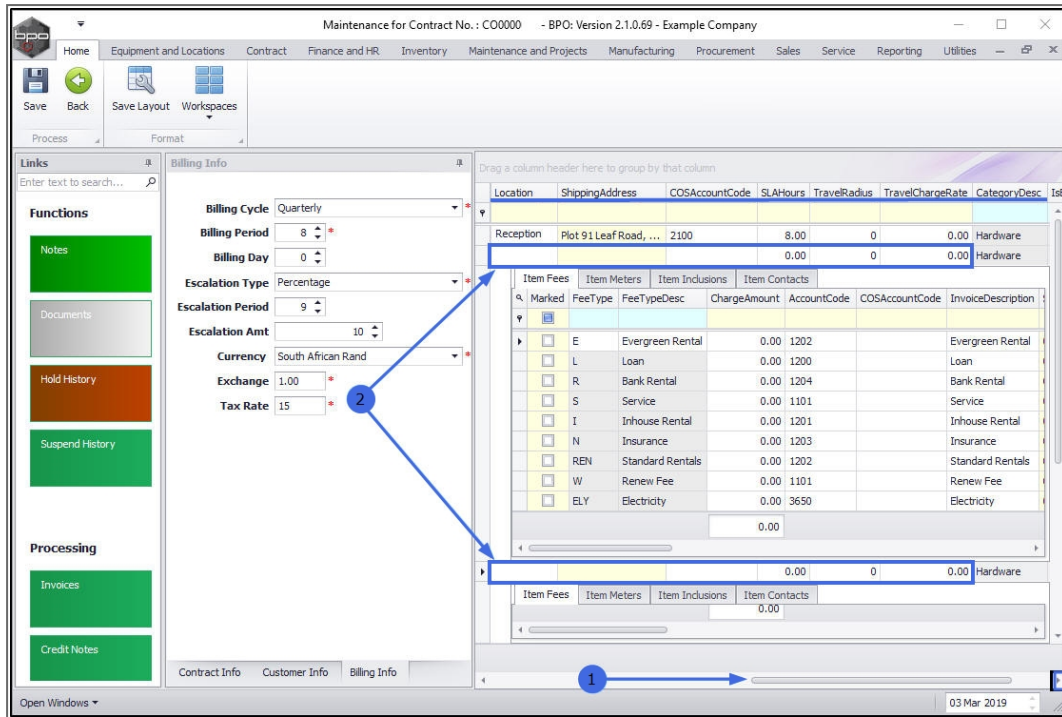
The **Maintenance for Contract No []** screen will be displayed.

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**



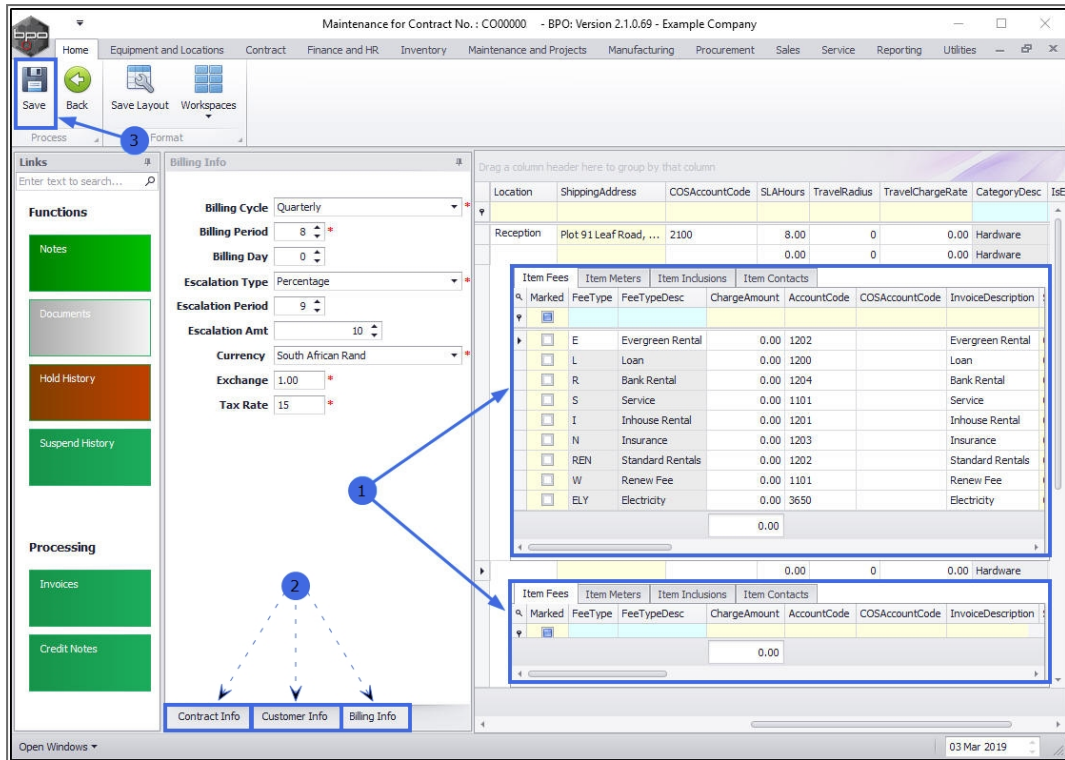
1. Scroll right to view all the contract item information.
2. You can update/edit the following fields:
 - Link a **Location**
 - Link a **Shipping Address**
 - Link a **COS Account Code**
 - Link a **SLA Hours**
 - Link a **Travel Radius**
 - Link a **Travel Charge**



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.

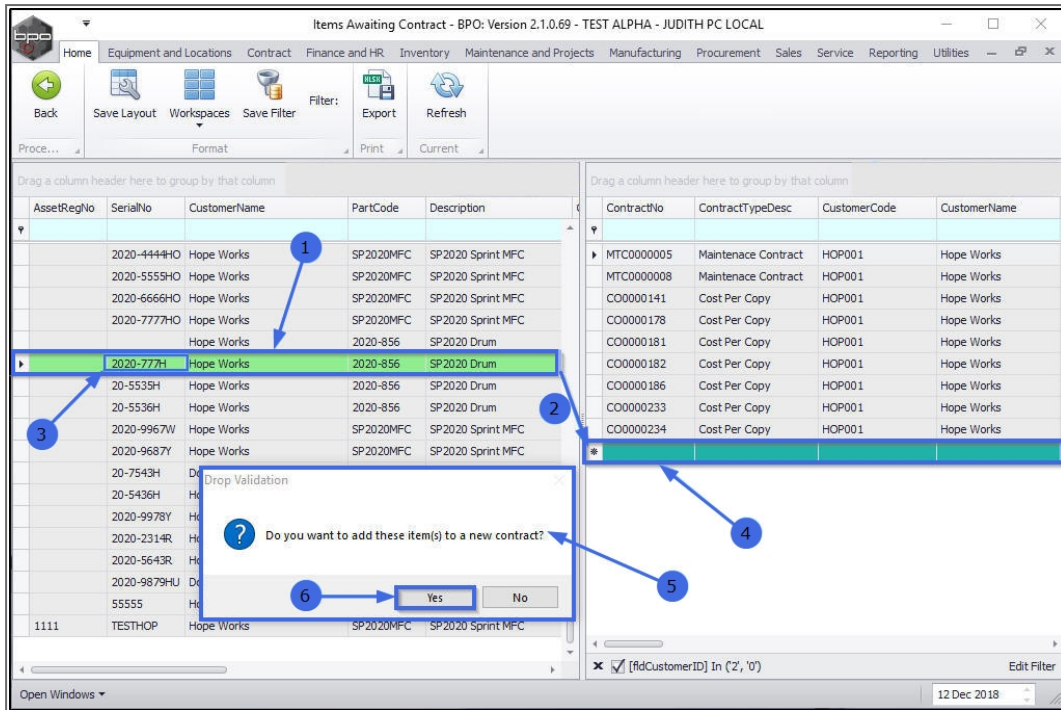
SAVE MULTIPLE LINKED ITEMS

3. Click on **Save**.

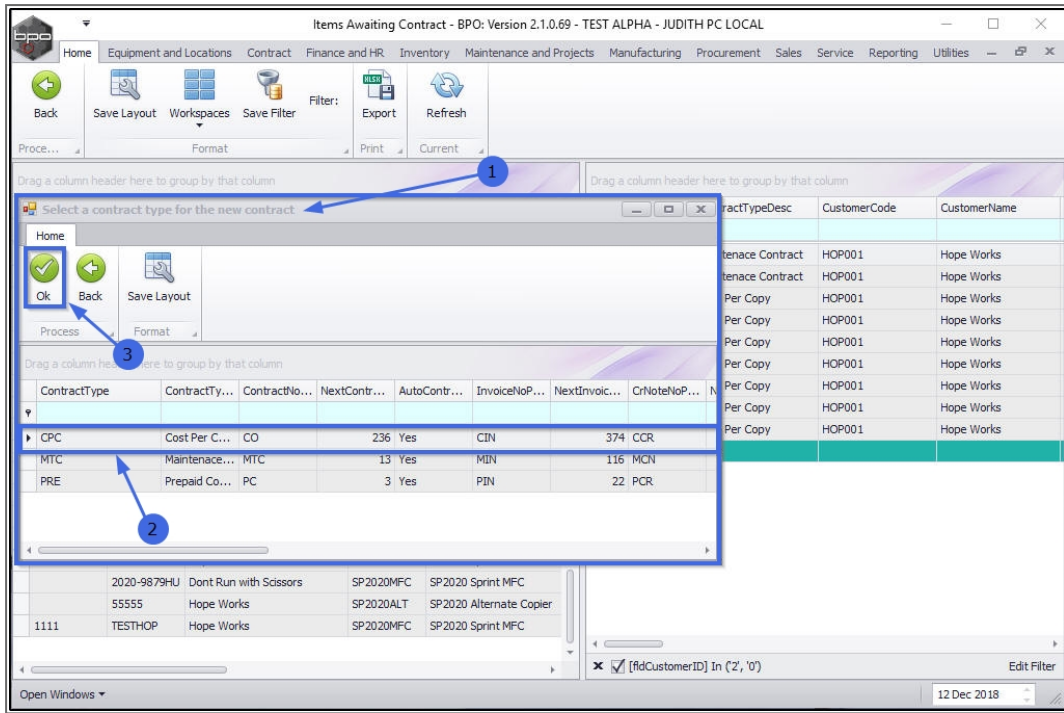


LINK SINGLE ITEM TO A NEW CONTRACT

1. 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**.



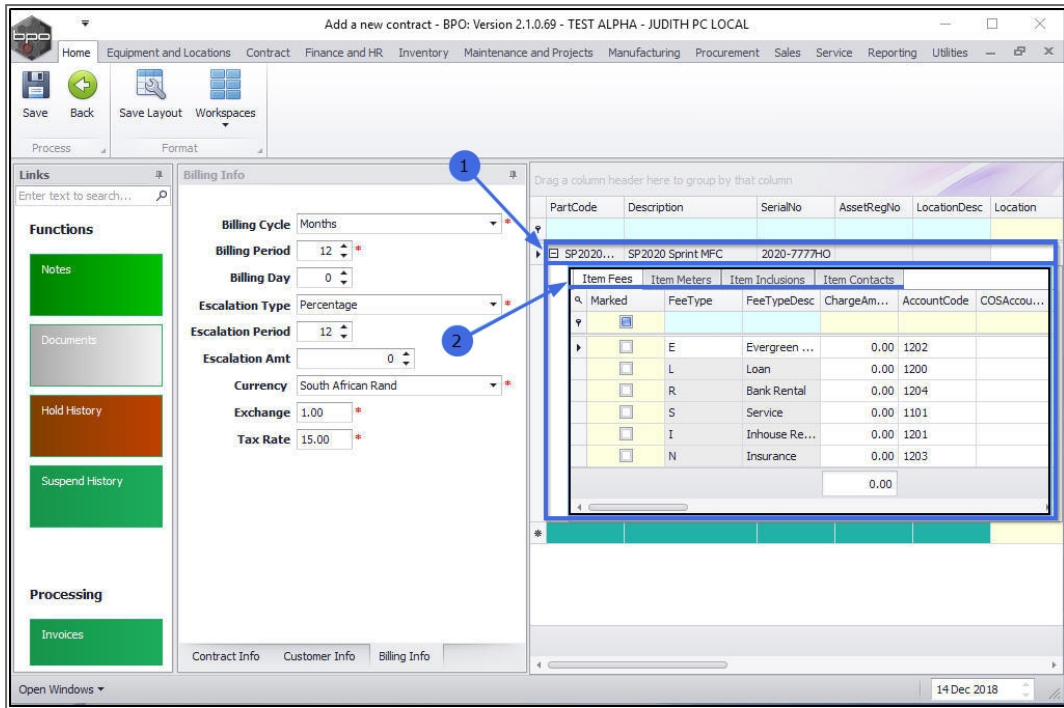
1. The **Select a contract type for the new contract** screen will pop up.
2. **Click anywhere** in the **row of the contract type** you wish to add.
3. Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected



The **Add a new contract** screen will be displayed.

ADD ITEM DETAILS/FEES

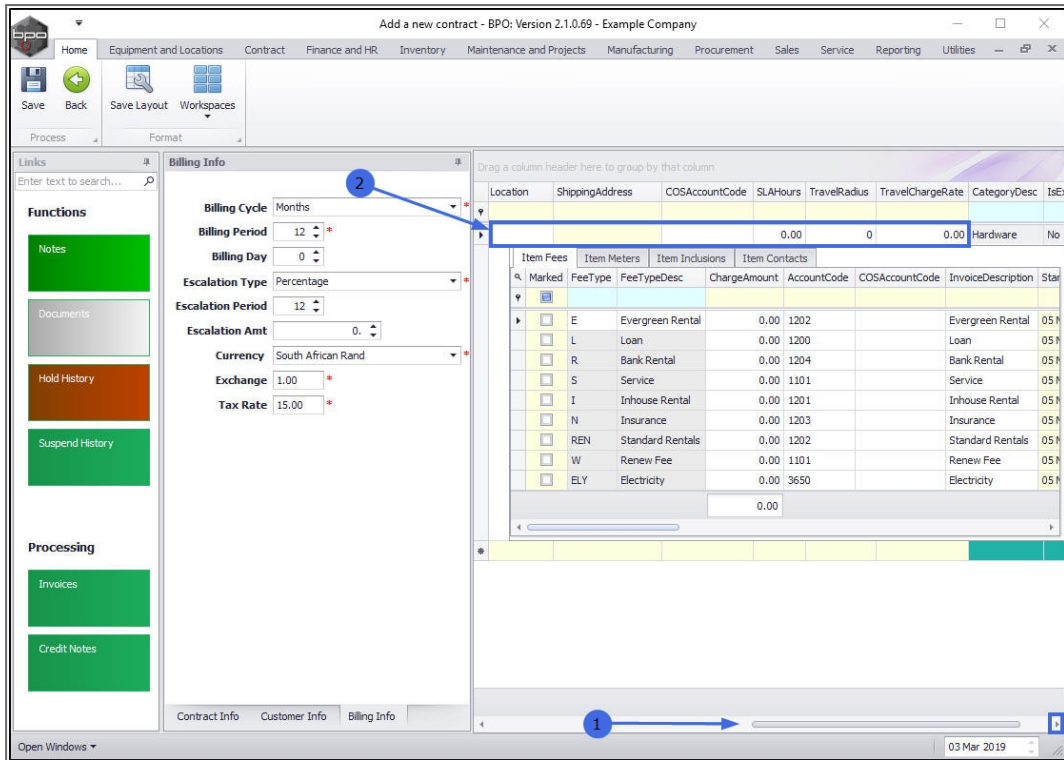
1. The item you are adding to the new **contract** will be listed in the **Parts** data grid.
2. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract item information.

2. You can update/edit the following fields:

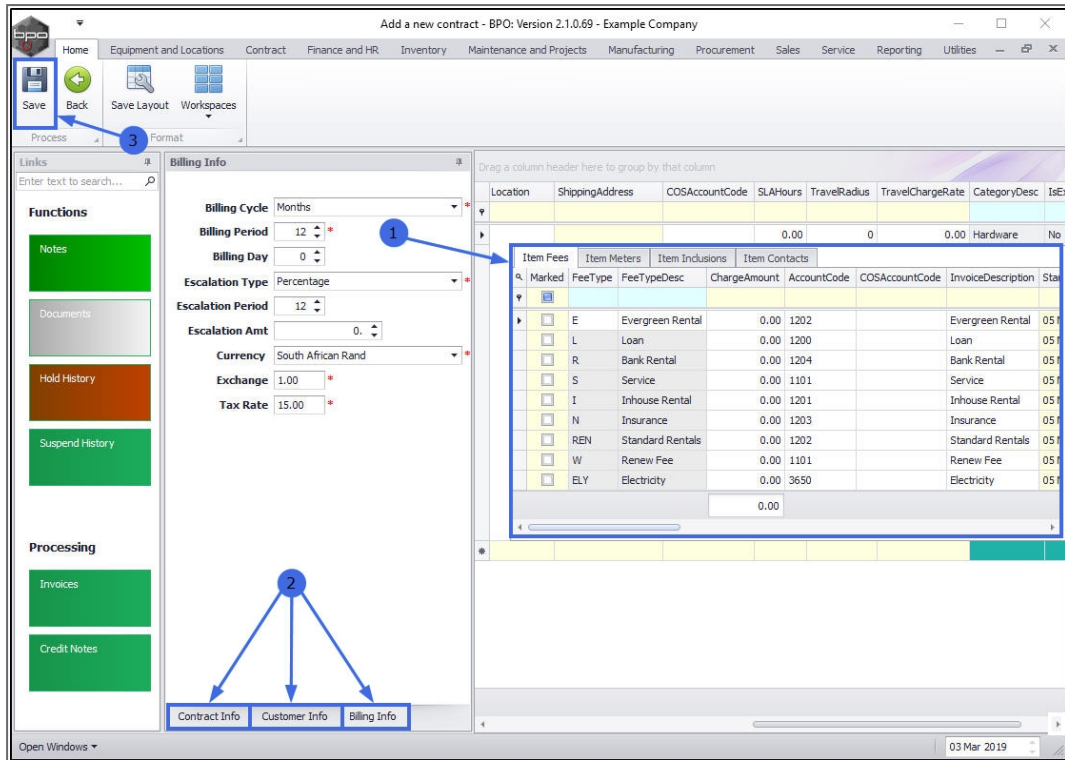
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



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

1. Click on **Save**.



- 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.

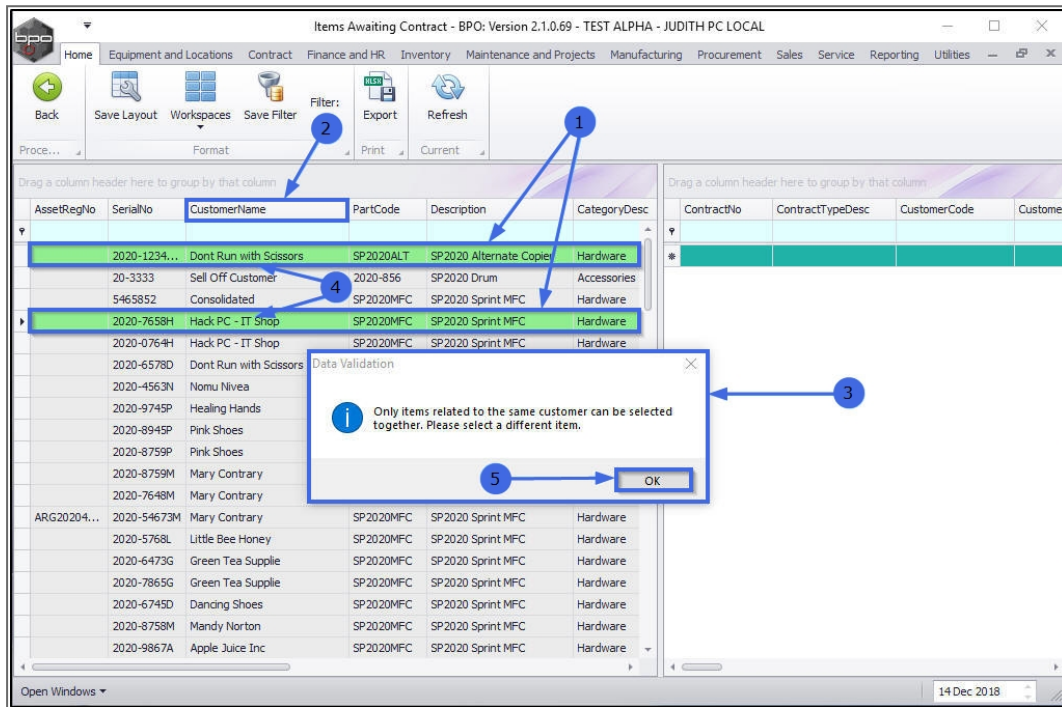
LINK MULTIPLE ITEMS TO A NEW CONTRACT

1. 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 more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

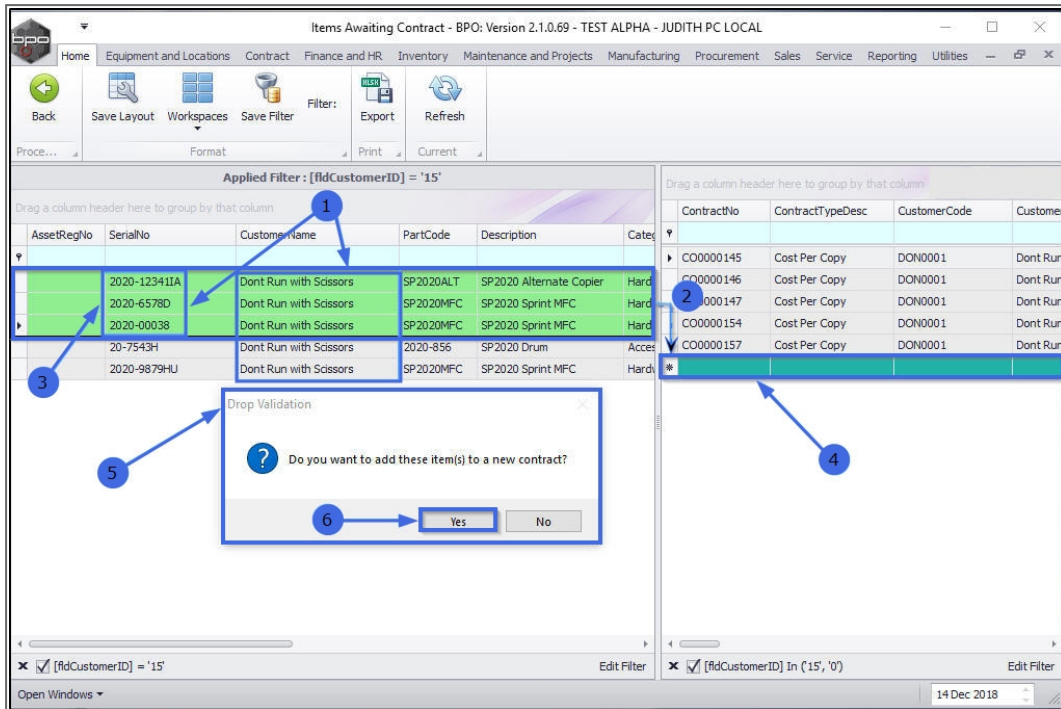
2. **Important Note:** The items selected have to belong to the **same** customer.
3. If you select items belonging to different customers then a **Data Validation** message box will pop up advising you that;

- 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.
 - Click on **OK** to clear the message and restart the selection.

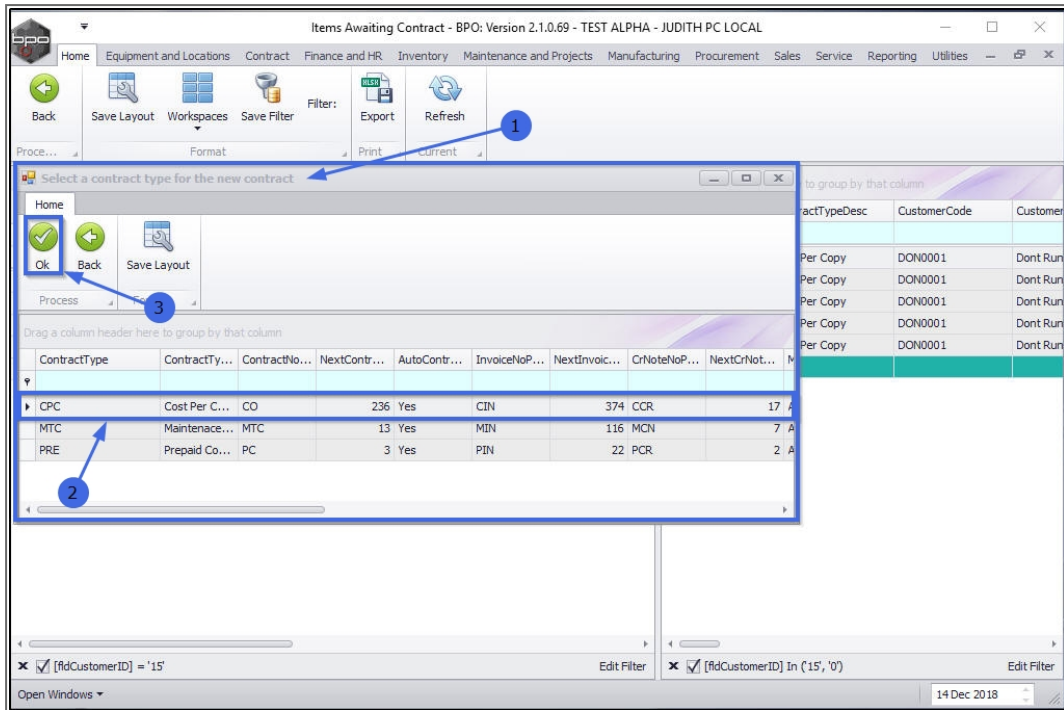


- As you select the second item line linked to the same customer, the system will auto filter the item lines in data grid **1**, to display only the items linked to that customer.
- Drag** the items to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
- In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

6. Click on **Yes**.



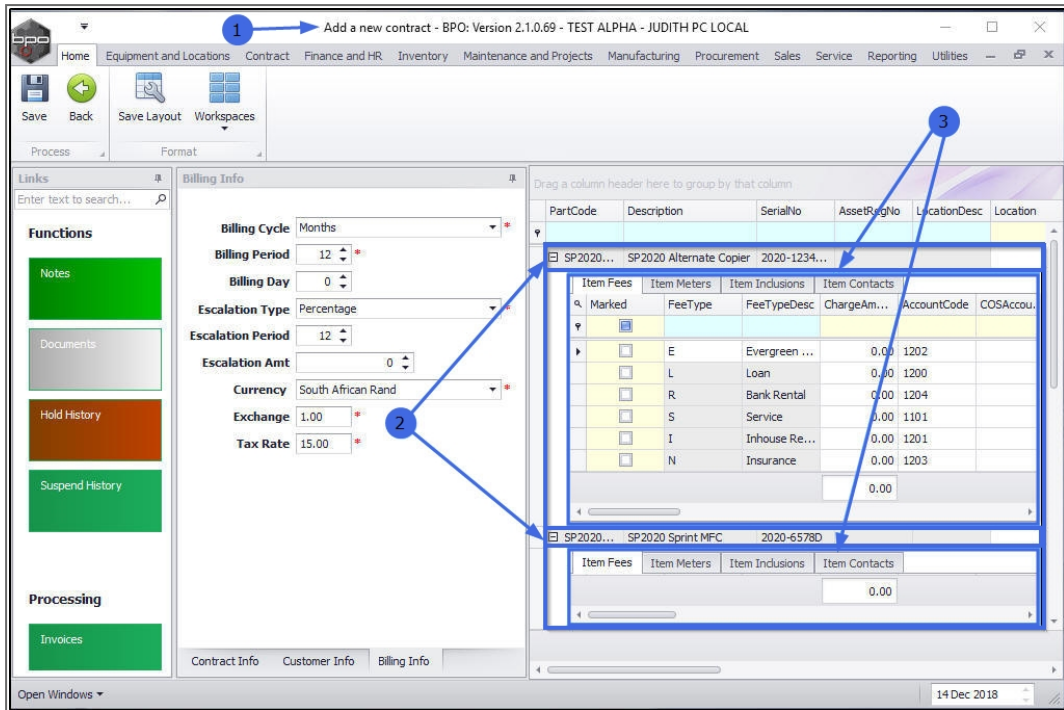
1. The **Select a contract type for the new contract** screen will pop up.
2. **Click anywhere** in the **row** of the **contract type** you wish to add.
3. Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected.



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

ADD ITEM DETAILS/FEES

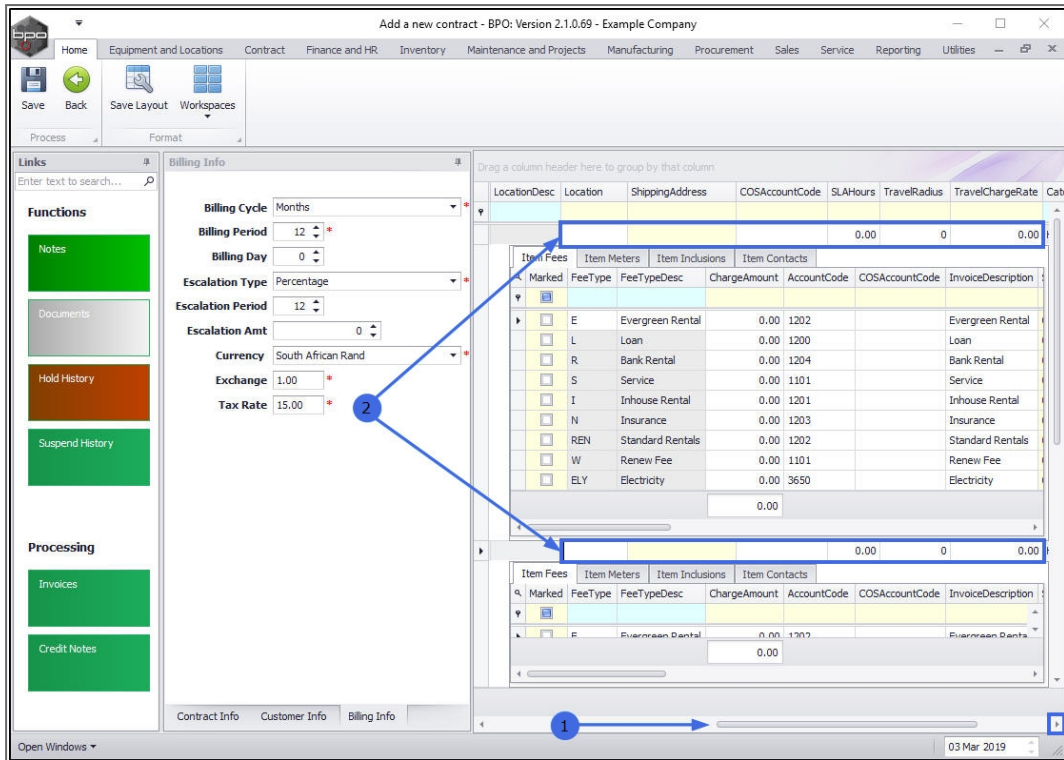
1. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract items information.

2. You can update/edit the following fields:

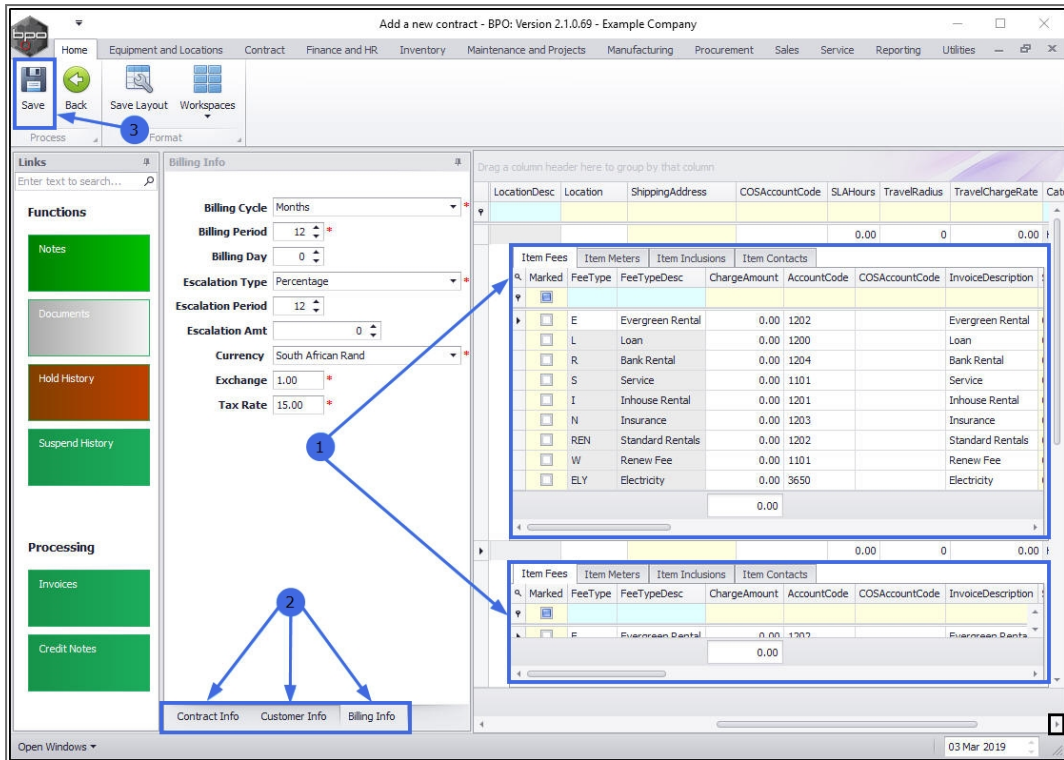
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



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

1. Click on **Save**.



- 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.

MNU.112.045