

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

CONTRACT

ADHOC ESCALATIONS

Adhoc escalations can be run at any time of the year, across all or selected contracts, regardless of the contract escalation period / amount.

Ribbon Select Contract > Period Escalations

Prov. Version 2.5.8.14 - Example Company

 Prov. Version 2.5

ADHOC ESCALATIONS SCREEN OVERVIEW

The **Adhoc Escalations** screen will be displayed, listing all **Active** contracts. This screen is divided into **4** frames:

- 1. Contract Types to be escalated.
- 2. Fee Types to be escalated.
- 3. Contracts to be escalated.
- 4. **Contract Items Charges** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.

Help v2024.5.0.7/1.0 - Pg 1 - Printed: 21/08/2024



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User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

Contract **Class** and **Category**, as <u>defined on the contract</u>, can be useful when filtering for contracts that you need to escalate.

- The **check boxes** are all **marked** when you first open the Adhoc Escalations screen.
 - This means that all the contract types and fees will be affected by any adhoc escalation changes that are made in this screen.

¹ BPO2 v2.5.0.8 or higher. " Add Interest Rate " on page 3



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Mark Items to be Escalated

• You can use the **Marked** check boxes to select the **Contract**

Types, **Fee Types**, **Contracts** and **Contracts Items** that you wish to escalate.

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• Each contract item meter charge will be listed individually, as follows:



- Item Fee (IFEE)
- Item Fee Back to Back (FBTB)
- Each contract item meter charge will be listed individually, as follows:
 - Item Meter Minimum Billing (IMTR)
 - Item Meter Cost per Copy (MTCH)
 - Item Meter Back to Back Minimum Billing (MBTB)
 - Item Meter Back to Back Cost per Copy (CBTB)
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AMOUNT, INCREASE AND NEW AMOUNT COLUMNS

In the Linked Contract Item Charges Listing frame, look at the **Amount**, **Increase** and **New Amount** columns.

- Amount: This is the amount of the fee that is being charged.
- Increase: This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a Percentage or a Flat Amount).



- In this image, the amount already set up on the system is a 10% escalation.
- New Amount: This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

You can make individual changes to the **Increase** amount, but when an escalation across multiple charges is required, then apply an escalation percentage across all marked items, as noted next.

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•	CO0000043	Cost Per Copy	Hope Works (Pty))Ltd H	HOP001				1	No	00000015	TOTO	Rental Contracts	Since - propriance	300.000	15.000	315.000	714001	Then Group
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											108 of 108				27,130.29	2,503.68	29,663.19		
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ESCALATION PERCENTAGE

You can use this process to apply a percentage amount across **all** of the **selected** Contract Types, Fee types and Contract Item Charge lines.

• Click in the **Escalation Period** field and either type in or use the arrow indicators to select the percentage that you wish to escalate by.



Adhoc Escalations

ф т .						Adhoc Esc	alations	- BP	0: Vers	ion 2.5.1.4 - Example	Company						G	- 8 X
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•	REN	Standard Rentals					•		\checkmark	No	CO000080	AMCH	Cost Per Copy	Aggregate Mono meter 0	60.500	6.050	66.550	OFF001
	W	Renew Fee							\checkmark	No	CO000079	AMCH	Cost Per Copy	Aggregate Mono meter 0	78.750	3.938	82.688	3 HOP001
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-	CO000031	Cost Per Copy	Young Electric	YES001	Class3	Category1			\checkmark	No	CO000074	FBTB	Cost Per Copy	BTOB - Insurance	500.000	50.000	550.000	DER001
	CO0000043	Cost Per Copy	Hope Works (Pty) Ltd	HOP001		2-11-			\checkmark	No	CO0000016	FBTB	Rental Contracts	BTOB - Insurance	300.000	15.000	315.000	TIA001
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• When you have selected the escalation amount, click on the **Apply** button.

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Þ	•	CO0000012	Prepaid Contract	Titan Group	TIA001	Class3	Category 1			\checkmark	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.025	0.525	TIA001
	•	CO0000016	Rental Contracts	Titan Group	TIA001	Class1	Category2			\checkmark	No	CO0000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-146.410	-1,610.510	TIA001
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	×	C00000019	Cost Per Copy	Office Supplies Unlimited	CHHO01	Class2	Category3			\checkmark	No	CO000074	FBTB	Cost Per Copy	BTOB - Service	275.000	27.500	302.500	DER001
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	×	C00000043	Cost Per Copy	Hope Works (Ptv) Ltd	HOP001	Class 3	Cavegory1			\checkmark	No	CO0000016	FBTB	Rental Contracts	BTOB - Insurance	300.000	15.000	315.000	TIA001
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- An Escalation Processing message box will pop up asking;
 - The Escalation percentage of [] will be applied to all the selected items. Do you still want to proceed?
- Click on Yes.



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• Review the Amount, Increase and New Amount columns.

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✓ C00000072 Cost Per Copy Hope Works (Pr), thd HOP001 Class3 ✓ C00000074 Cost Per Copy Derton / Technologies DER001 Class3 ✓ C00000077 Cost Per Copy Perk Shees PIN0001 Class3 ✓ C00000077 Cost Per Copy Perk Shees PIN0001 Class1 ✓ C00000078 Cost Per Copy Perk Shees PIN0001 Class1		N	No	CO0000012	IFEE	Prepaid Contract	Service	1,691.036	253.655	1,944.691	TIA001
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	Category 1			108 of 108				27,130.29	4,069.54	31,199.84	

• You will see that the **15%** increase has been applied.

SAVE ADHOC ESCALATIONS

- When you have finished making the adhoc escalation rate changes, click on **Save**.
- Note that only **marked** items will be escalated.



) v						Adhoc Esc	alations	- BPO	0: Version	n 2.5.1.4 - Examp	le Company						-	- @ ×
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	CO0000012	Prepaid Contract	Titan Group	TIA001	Class3	Category 1			V N	No	CO0000016	CBTB	Rental Contracts	BTOB - Mono meter 0	0.500	0.075	0.575	5 TIA001
	CO0000016	Rental Contracts	Titan Group	TIA001	Class1	Category2			V N	No	CO0000012	FBTB	Prepaid Contract	BTOB - Service	-1,464.100	-219.615	-1,683.715	5 TIA001
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and the dama														Liner - Ranza	22/02/2023	Viercien I	2 5 4 4 Even	mala Comozoi

- A Run Adhoc Escalations message box will pop up asking;
 - Are you sure you want to escalate the selected items?
- Click on Yes.

Ŧ						Adhoc Ese	alations -	BPO: Ve	rsion 2.5.1.4 - Example	Company						-	. 2
😨 Ho	ome Equipme	nt / Locations Con	tract Finance / HR I	nventory Mai	ntenance / Pr	ojects Manufi	scturing	Procure	nent Sales Servi	ce Reporting	Utili	ties					- 8
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	CO0000018	Cost Per Copy	Samanthas Diner	SAM001	Class1	Category3		\checkmark	No	CO0000019	FBTB	Cost Per Copy	BTOB - Bank Rental	423.500	63.525	487.025	OFF001
	CO0000019	Cost Per Copy	Office Supplies Unlimited	OFF001	Class2	Category3		\checkmark	No	CO000074	FBTB	Cost Per Copy	BTOB - Service	275.000	41.250	316.250	DER001
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	00000000	0.00.0	1	100000						108 of 108				27,130.29	4,069.54	31,199.84	

• The selected escalations will be **saved** and the screen will close.

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