

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

SERVICE

CALLS - FOR CONTRACT

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the Call Centre Mode notes.

The Items Awaiting Contract for Call screen displays items linked to the selected call 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)

Ribbon Select Service > Calls



• The Call Listing screen will be displayed.

¹BPO2 v2.5.1.3 or higher



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Durban	E 040001003	Toung beceric	13/12/202	 Analong Acceptance 	Annesion	30:09:10	Test account balances	UR	Change Request			107		-
New New	E 00001002	samanthas Ulner	1414204	2 Alkalong Acceptance	Mary Inompson	16118130	Test call for account balances manual.	DK	Select Call Type			19-12/1202		-
In Progress	H CN0001001	Young Electric	29/11/203	2 UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sm123		
Hold	E CN0000996	Hope Works (Pty) Ltd	31/10/202	2 UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
Pending	▶ EI CN0000992	Top Vehicle Hire	25/10/202	2 Assaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	SURV	Service	_		TOP 12340LD		-
Complete	E CN0000991	Apple Juice Inc	24/10/203	2 UnAssigned		16:38:15	Contract Closure - CO0000054	DR	Select Call Type					
O AI	E CN0000989	Derton / Technologies	13/06/200	2 UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
Pretoria	E CN0000988	Young Electric	03/06/200	2 UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/202	2 UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986 1	Young Electric	07/06/200	2 UnAssigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
O Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/200	2 UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		
O Consiste	E CN0000984	Hope Works (Pty) Ltd	08/06/202	2 UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O al	E CN0000983	Hope Works (Pty) Ltd	09/06/202	2 UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
Crost Town	E CN0000982	Young Electric	10/06/200	2 UnAssigned		06:00:35	Test elapsed hours 1	TEST	Testing			sin123		
O New	E CN0000976	Young Electric	19/11/201	9 Awaiting Acceptance	Bianca Du Tolt	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Process	E CN0000974	Hope Works (Pty) Ltd	18/11/201	Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
() Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/201	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		17
Pending	E (N0000971	Westwood Dynamic	29/11/201	2 UnAssigned		03:00:00	BathBinNaint - Bathroom Bin Maintenance	94	Scheduled Maintenance				Checkers Centre - Hilcrest	
O Complete	FE (N0000920	Westwood Dynamic	22/11/201	Interimed		08-00-00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilmest	
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() Al	EE CN0000963	Westwood Dynamic	25/10/201	9 UnAssigned		05:00:00	SathSinMaint - Bathroom Bin Maintenance	574	Scheduled Maintenance				Checkers Centre - Hilcrest	
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	E CN0000961	Hope Works (Pty) Ltd	18/10/201	9 UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	E CN0000960	Westwood Dynamic	18/10/201	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/201	9 UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/201	9 UnAssigned		03:00:00	SathSinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/201	9 UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000936	Westwood Dynamic	20/09/201	9 UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/201	UnAssigned		08:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies	17/09/201	9 UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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	Count: 386													

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.



• Select the **Call** you wish to work with.



						Call L	Listing - BPO: Version 2.5.1.4 - Example Company							
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formation	E CN0001003	Young Electric	13/12/2022	Amaiting Acceptance	Arin Milton	10:09:10	Test account balances	CR	Change Request			107		
Durban	CN0001002	Samanthas Diner		Awaiting Acceptance	Mary Thompson	16:18:30	Test call for account balances manual.	DR	Select Call Type			19-12/1202		
O New	E CN0001001	Young Bectric	29/11/2022	UnAssigned		11:29:19	Order the same part twice receive with different batch num	CR	Change Request			sin123		
0 unit og ess	E CN0000995	Hope Works (Pty) Ltd	31/10/2022	UnAssigned		11:01:11	ForRentalContract	NDR	New Deal Rental				BPO2 TEST 1	
O Pendon 1	E CN0000992	Top Vehicle Hire	25/10/2022	Awaiting Acceptance	Daniel Balgowen	14:09:17	Loan machine for temporary high volume printing requirement	SERV	Service			TOP 12340LD		
O Complete	E CN0000991							DR						
O AI	⊞ CN0000989	Derton / Technologies	13/06/2022	UnAssigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		
D Pretoria	E CN0000988	Young Bectric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	sin123		
New	E CN0000987	Young Electric	06/06/2022	UnAssigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			sin123		
In Progress	CN0000986					05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
() Hold	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	LIPG	Upgrade			20-98765		
O Pending	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
O complete	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:08:31	Test elapsed time 2 - day prior	TEST	Testing			5IN32413546		
Coop Town	E CN0000982	Young Bectric	10/06/2022	UnAssigned		05:00:35	Test elapsed hours 1	TEST	Testing			sin123		
O New	CN0000976	Young Electric	19/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration			107		
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095011015		
() Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
O Al		Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
5 tioemfontein	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	574	Scheduled Maintenance			NEW 1234		
O New	E CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
In Progress	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hilcrest	
O Develope	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	54	Scheduled Maintenance			147807		
() Al	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		03:00:00	SathSinMaint - Bathroom Bin Maintenance	574	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
	E CN0000961	Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DAST.	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	BathSinNaint - Bathroom Bin Maintenance	54	Scheduled Meintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd		UnAssigned		08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
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• Click on the **Edit** button.

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Hold	E CN0000996	Hope Works (PTy) Ltd		UnAssigned			Forkentakontract	NDK	New Dear Kental				BPO2 TEST 1	
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Complete	ES-EN0000991	Hoped bace and	24/10/2022	UNAssigned		10:38:15	Constant Colore - CCCCCCCS4	LR	select call type					
AI	E CN0000989	Denton / Technologies	13/06/2022	Unassigned		00100100	Call for Monday eapse hours check	TEST	resong			2020-2222		
retoria	E CN0000988	Young Bectric	03/06/2022	UnAssigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONP	Configuration	sin123		
In Deserves	E CN0000987	Toung Bectric	06/06/2022	UnAssigned		06:00:00	Call logged 4 days ago for elapse tine checks	UPG	Upgrade			sin123		
Land	E CN0000986	Young Bectric	07/06/2022	Unilosigned		05:00:00	Call logged 3 days ago for elapse time checks	DR	Select Call Type			sin123		
Pendina	E CN0000985	Hope Works (Pty) Ltd	10/06/2022	UnAssigned		16:09:13	Test future call - for elapsed time	UPG	Upgrade			20-98765		
Complete	E CN0000984	Hope Works (Pty) Ltd	08/06/2022	UnAssigned		05:10:00	Test elapsed hours - 2 days prior	TEST	Testing			AT5000000		
AL	E CN0000983	Hope Works (Pty) Ltd	09/06/2022	UnAssigned		05:03:31	Test elapsed time 2 - day prior	TEST	Testing			SIN32413546		
ape Town	E CN0000982					05:00:35	Test elapsed hours 1					sin123		
New	■ CN0000976			Awaiting Acceptance	Bianca Du Toit	11:24:39	Test with site manager email entered	ADM	Administration					
In Progress	E CN0000974	Hope Works (Pty) Ltd	18/11/2019	Amaiting Acceptance	Bianca Du Toit	16:30:20	test another call email	ADM	Administration			095010015		
Hold	E CN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:57:00	Test new call for email description in body	CR	Change Request			095011015		
Pending	E CN0000971	Westwood Dynamic	29/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	54	Scheduled Maintenance				Checkers Centre - Hildrest	
Complete	EE CN0000970	Westwood Dynamic	22/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
A		Hope Works (Pty) Ltd	16/11/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
New	E CN0000968	Green Tea Supplies	16/11/2019	UnAssigned		03:00:00	2MS - 2 month service	514	Scheduled Maintenance			NEW 1234		
In Program	⊞ CN0000967	Westwood Dynamic	15/11/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
Hold	E CN0000966	Westwood Dynamic	08/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hildrest	
Pending	EE CN0000965	Westwood Dynamic	01/11/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hillcrest	
Complete	E CN0000964	Hack PC - IT Shop	26/10/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		
AI	E CN0000963	Westwood Dynamic	25/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	\$24	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000962	Hope Works (Pty) Ltd	19/10/2019	UnAssigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		
		Hope Works (Pty) Ltd	18/10/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	
	EE CN0000960	Westwood Dynamic	18/10/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	⊞ CN0000959	Westwood Dynamic	11/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000958	Westwood Dynamic	04/10/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	514	Scheduled Maintenance				Checkers Centre - Hilcrest	
	E CN0000957	Westwood Dynamic	27/09/2019	UnAssigned		08:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000956	Westwood Dynamic	20/09/2019	UnAssigned		03:00:00	BathBinMaint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hildrest	
	E CN0000955	Hope Works (Pty) Ltd	18/09/2019	UnAssigned		03:00:00	Tier - Commercial Tier Test	DIST	Installation				Forest Hills Centre	
	E CN0000954	Green Tea Supplies	17/09/2019	UnAssigned		03:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW 1234		
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- The Call Maintenance screen will be displayed.
- Click on the For Contract tile.



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open millions *										1: 1960	and RUCIN 1	515512022			

FOR CONTRACT

- The Items Awaiting Contract for Call [] screen will be displayed.
- The screen is divided into **2** data grids.
 - Data grid 1: displays all the items linked to the selected call waiting to be allocated to a contract. These items can either be client assets or internal assets. For internal assets to be displayed, a New Deal Rental process has to be completed first.
 - Data grid 2: displays all the existing contracts for the customer linked to the call.
 - Note:Deleted or closed contracts will not be displayed in this data grid.



• •		Items A	waiting Contr	act for Call, Ref No : DCN	0000207 - BPO:	Ver	sion 2.4.0.0 - TES	T ALPHA - JUD	ITH PC LOCAL	L		
Hon	ne Equipme	nt / Locations Contract	Finance / HR	Inventory Maintena	nce / Projects	Mar	ufacturing Pro	curement S	ales Servio	e Reporting	Utilities	- 8
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							CO0000260	Cost Per C	ору	HOP001	Hope Works	01/12/2019
							CO0000263	Cost Per C	ору	HOP001	Hope Works	01/12/2019
							CO0000264	Cost Per C	ору	HOP001	Hope Works	01/12/2019
							CO000265	Cost Per C	ору	HOP001	Hope Works	01/12/2019
							CO0000266	Cost Per C	ору	HOP001	Hope Works	01/12/201
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LINK A SINGLE ITEM TO AN EXISTING CONTRACT

- **Click** and **hold** on the contract item in data grid **1**, that you wish to add to an existing contract.
- **Drag** the contract item to an existing contract displayed in data grid **2**.
- In this image, serial no. **2020-7685P** has been selected, and will be dragged and dropped onto
- Contract no. CO0000260.
- 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 []?
- Click on Yes.



💭 🔻		Items A	waiting Contr	act for Call, Ref No : DCI	10000207 - BPO:	Versi	ion 2.4.0.0 - TE	EST ALPHA -	JUDITH PC LO	CAL		_		×
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The Maintenance for Contract No.: [] screen will be displayed.

- The contract item you have added will be listed last in the **Parts** data grid.
- 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

Help v2024.5.0.7/1.0 - Pg 6 - Printed: 21/08/2024



٢	Ŧ			Maintenance for	Contract No. : C	00000260 - BPO: Vers	ion 2.4.	0.0 - 1	TEST A	Alpha - Ju	DITH P	C LOCAL				
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In this screen,

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



٢	Ŧ			Mainte	nance for Contract No. : CO0000260	- BPO: Version 2	.4.0.0 - TEST ALPHA	A - JUDITH PC LOC	AL				
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- You can input relevant data for the Part Item frames.
- Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.
- Click on Save.

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

LINK MULTIPLE ITEMS TO AN EXISTING CONTRACT

 In the Items Awaiting Contract for Call 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.

- **Drag** the items to an existing contract in data grid 2.
- In this image, serial no **2020-707541** and **2020-1111s** have been selected, dragged and dropped on to contract no **CO0000257**.
- A Drop Validation message box will pop up asking;
 - Do you want to add these items(s) to contract no. []
 for customer []?
- Click on Yes.



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

- The items you are adding to the contract will be listed last in the **Parts** data grid.
- 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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In this screen,

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



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





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

LINK A SINGLE ITEM TO A NEW CONTRACT

- In the **Items Awaiting Contract for Call** screen, click on the single item that you wish to add to a **new** contract.
- Drag the item to the last, blank row in data grid 2. This row contains an **asterisk** in the row selector column.
- In this example, serial no **2020-00008** has been selected, dragged and dropped to
- the final **blank row** in data grid **2**.
- A Drop Validation message box will pop up asking;
 - Do you want to add these items(s) to a new contract?
- Click on Yes.

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• The **Select a contract type for the new contract** screen will pop up.

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- Click anywhere in the row of the contract type you wish to add.
- 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.

- The item you are adding to the new **contract** will be listed in the **Parts** data grid.
- 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



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In this screen,

- Scroll right to view all the contract item information.
- 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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- You can input relevant data for the Part Item frame.
- Add the relevant contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel, (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be autopopulated but you can change them.
- Click on Save.



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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. **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 **2020-00006** and **2020-00007** 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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• The Select a contract type for the new contract screen will pop up.



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- Click anywhere in the row of the contract type you wish to add.
- 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.



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

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In this screen,

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

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



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- You can input relevant data for the Parts Item frames.
- Add the new contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be autopopulated but you can change them.
- Click on Save.



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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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