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

SERVICE

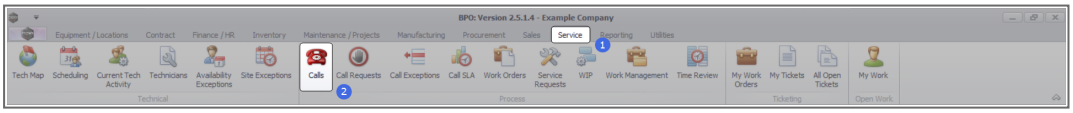
CALLS - FOR CONTRACT

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 Compatibility[1]. 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.

[1] BPO2 v2.5.1.3 or higher

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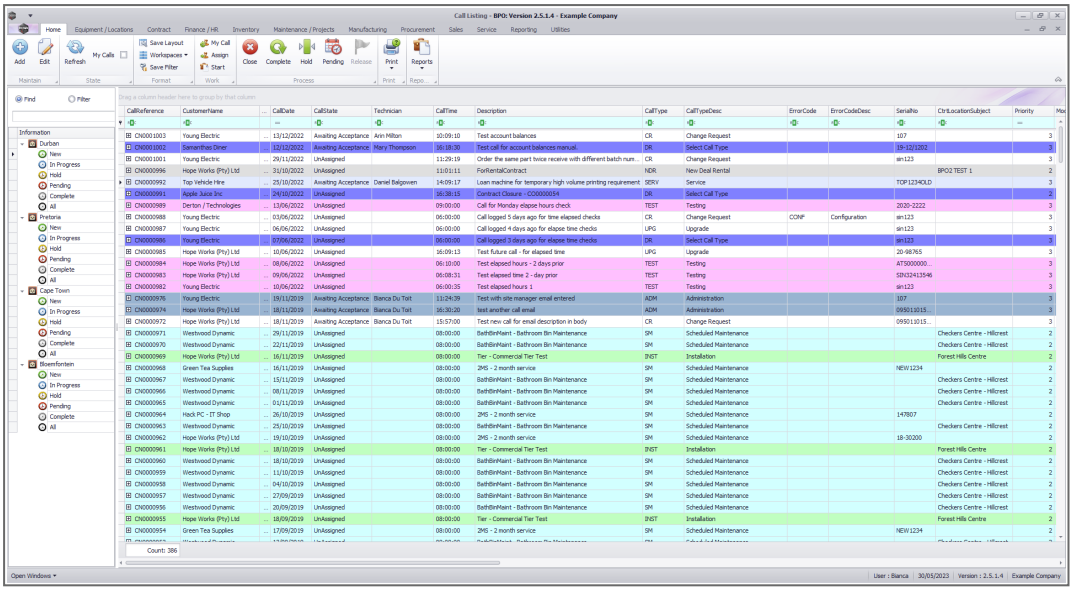
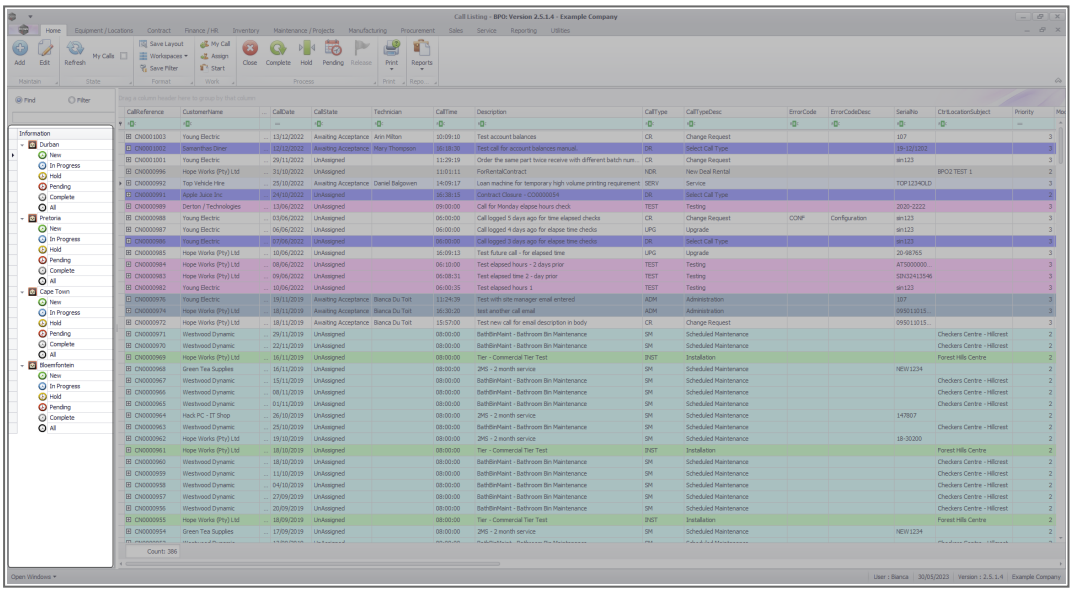


- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.



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

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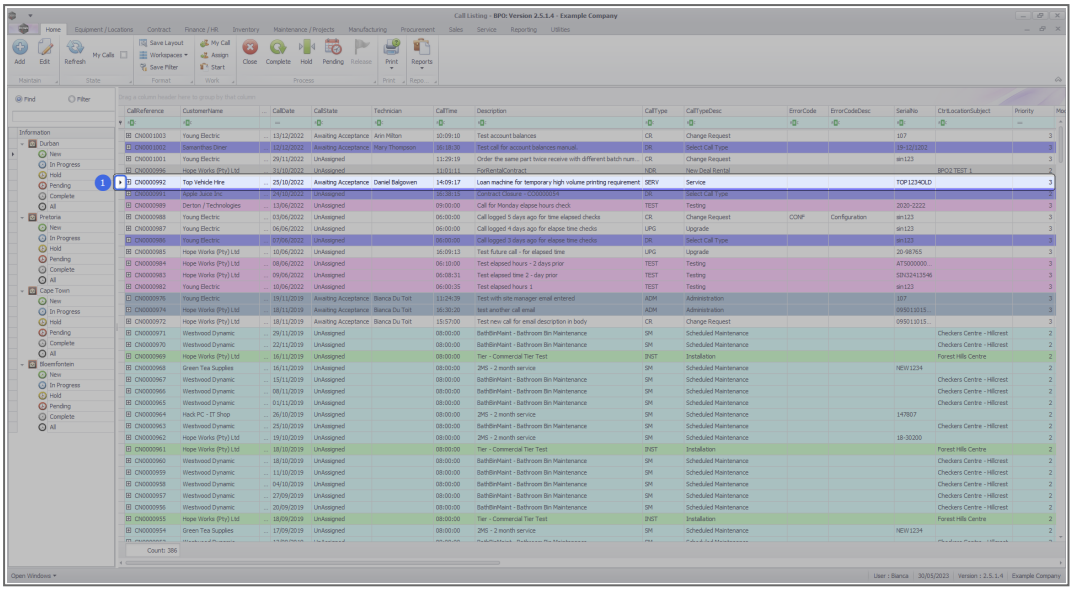
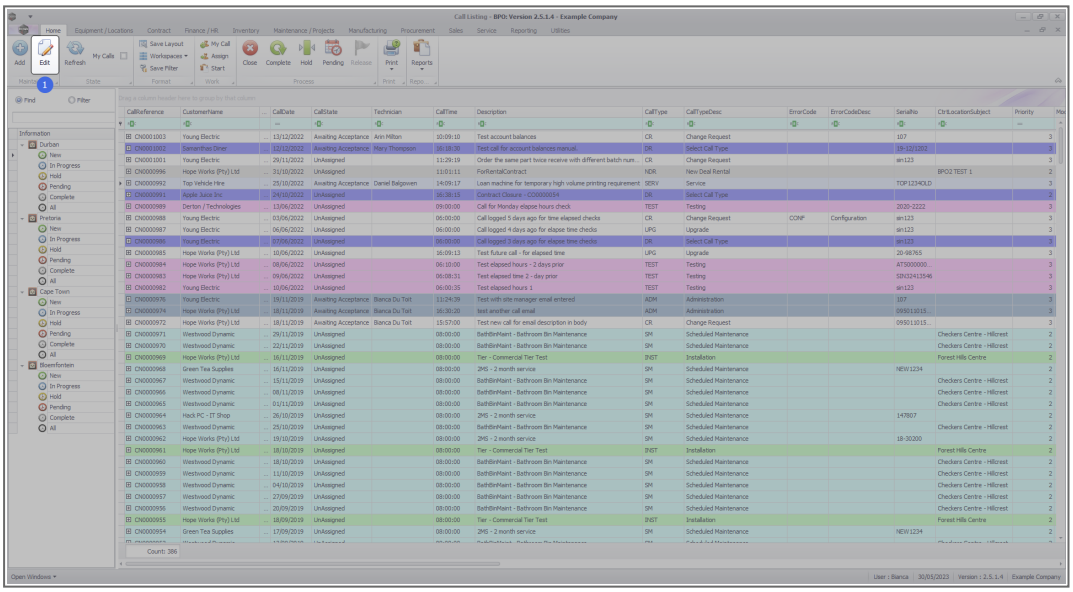


- Click on the **Edit** button.



- The **Call Maintenance** screen will be displayed.
- Click on the **For Contract** tile.

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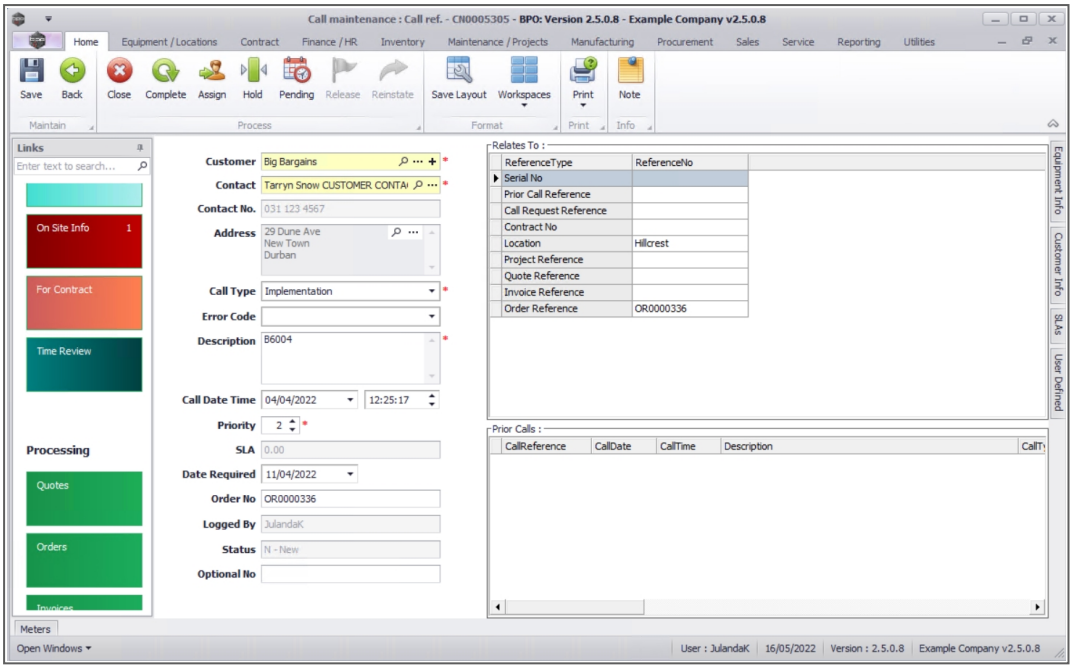

FOR CONTRACT

- 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.

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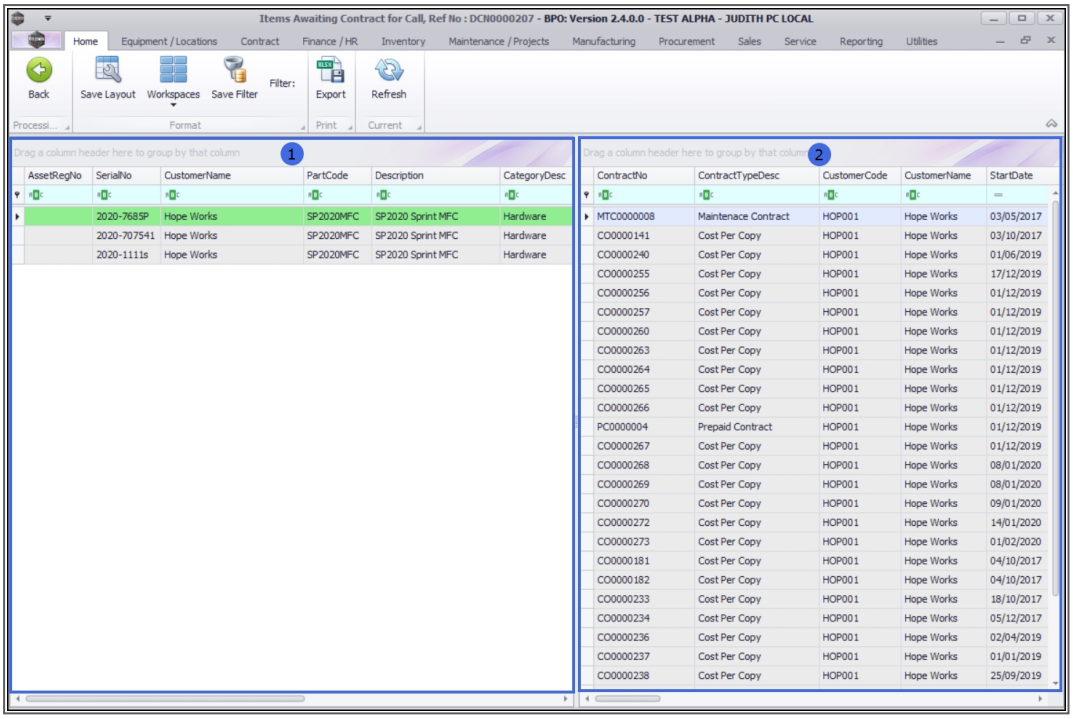

LINK A SINGLE ITEM TO AN EXISTING CONTRACT

- **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**.

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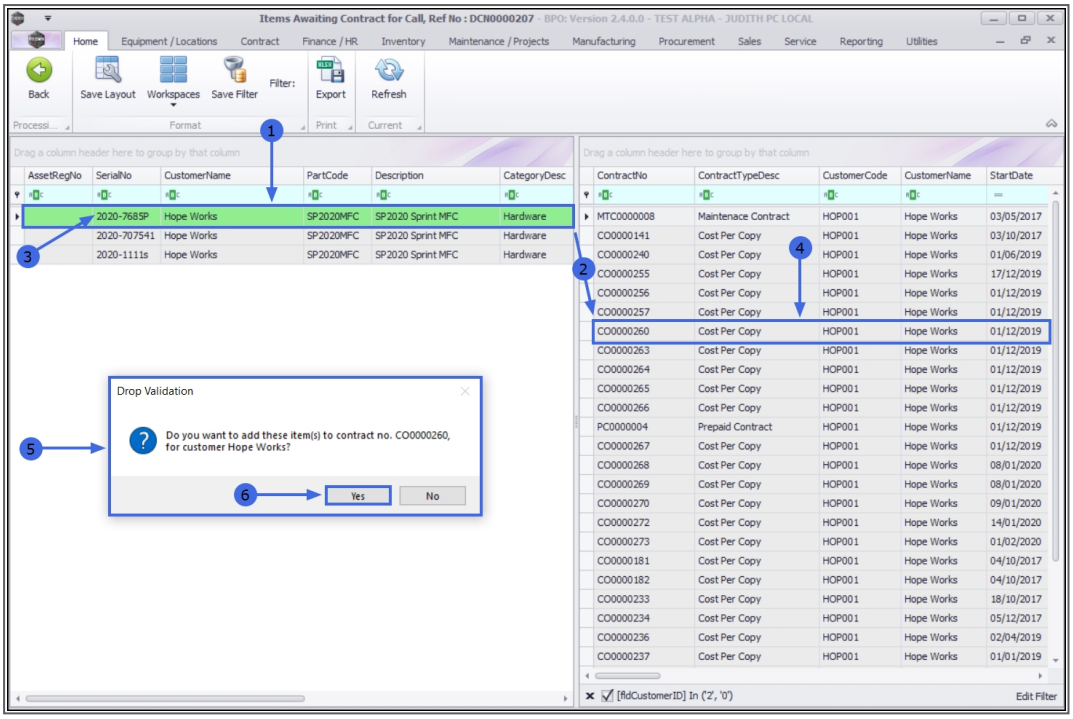

The**Maintenance for Contract No.: [ ]** screen will be displayed.

- 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

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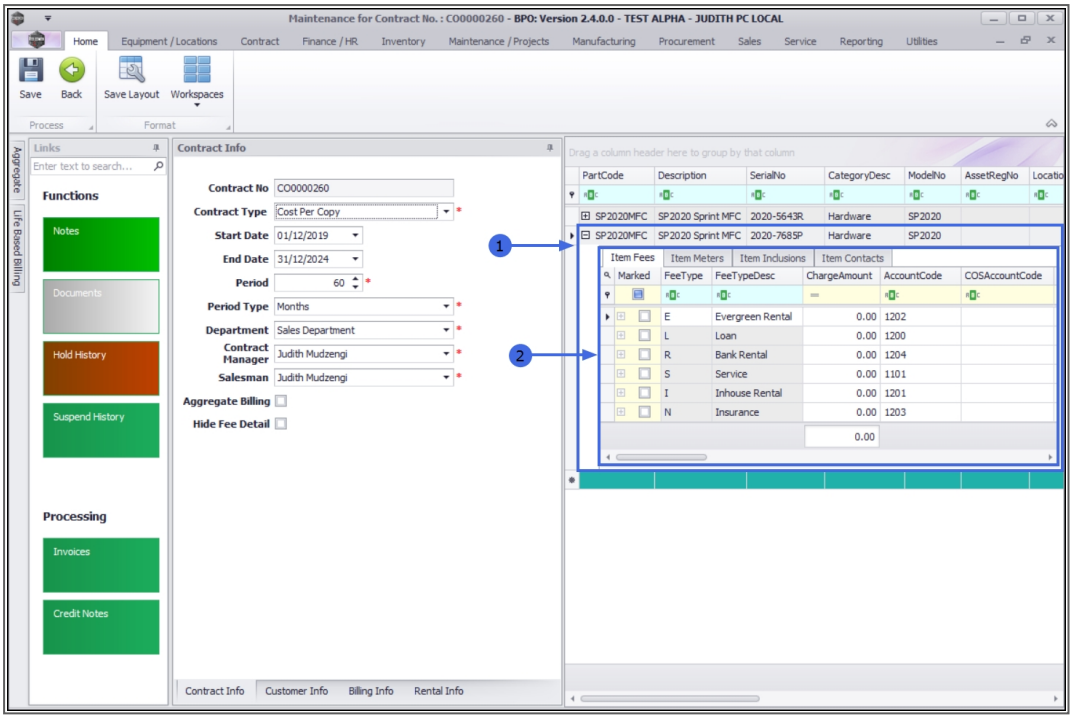

In this screen,

- 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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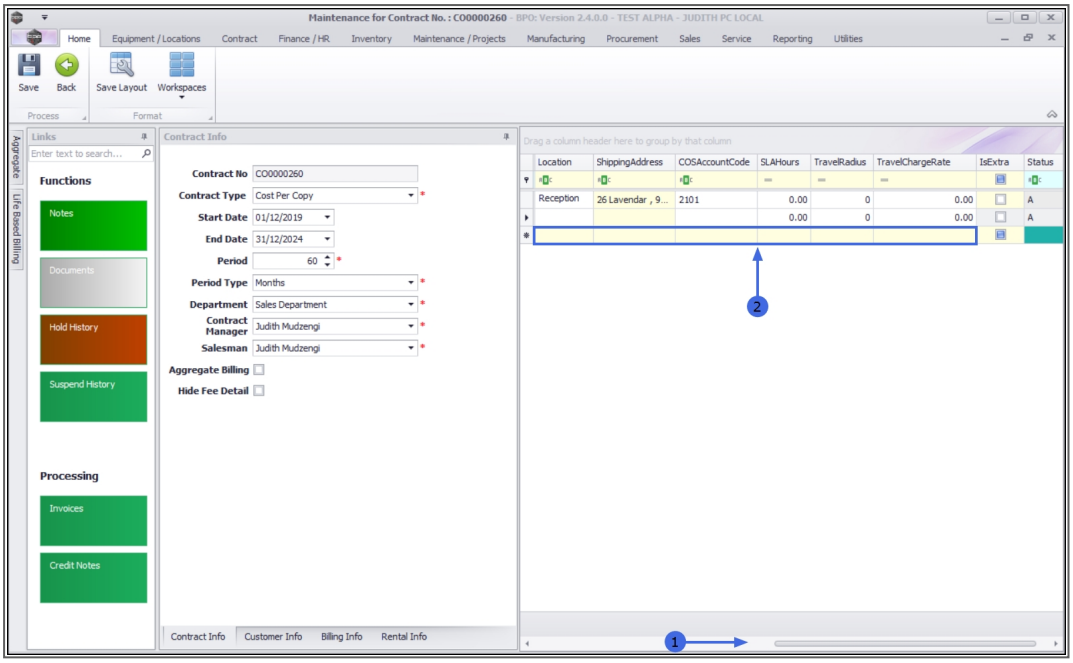
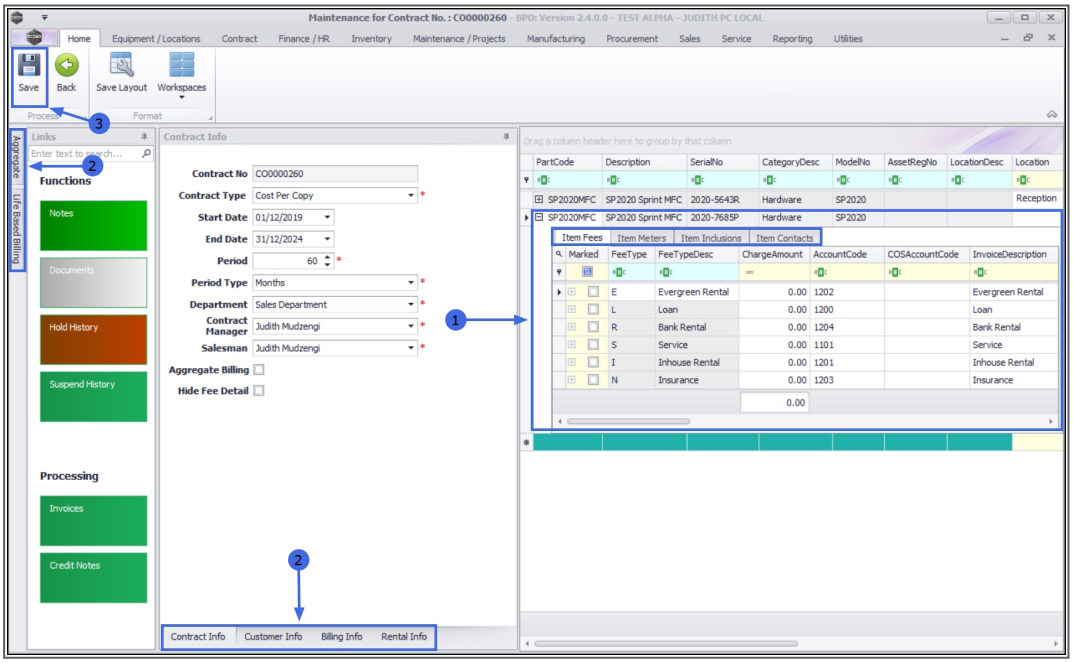


- You can input relevant data for the Part Item frames.
- Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.
- Click on **Save**.



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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 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.
- **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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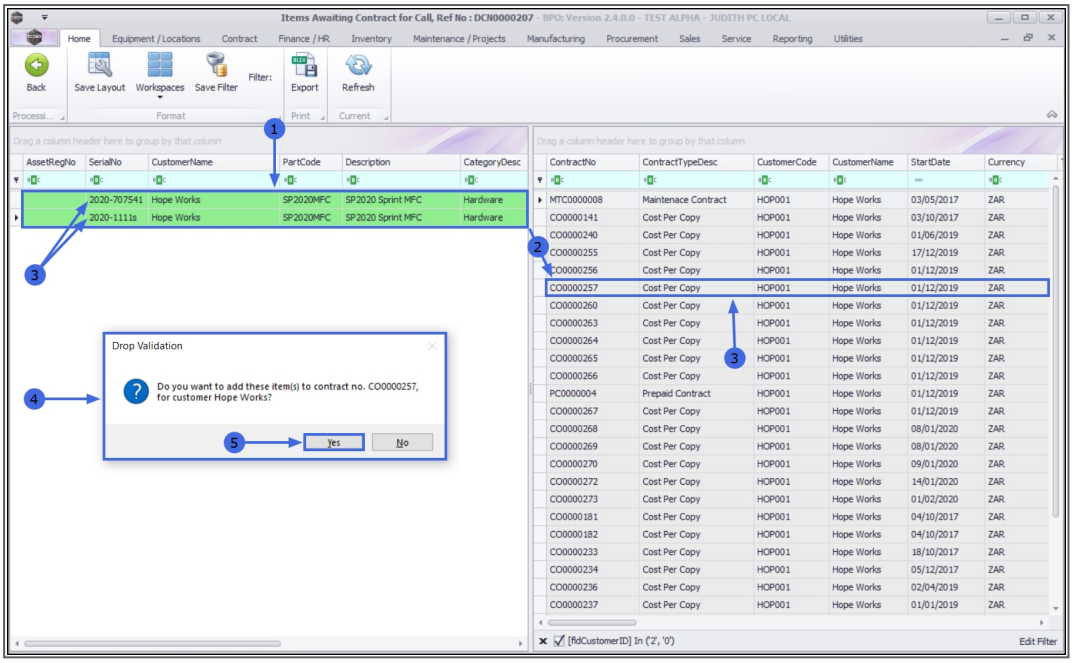

The **Maintenance for Contract No [ ]** screen will be displayed.

- 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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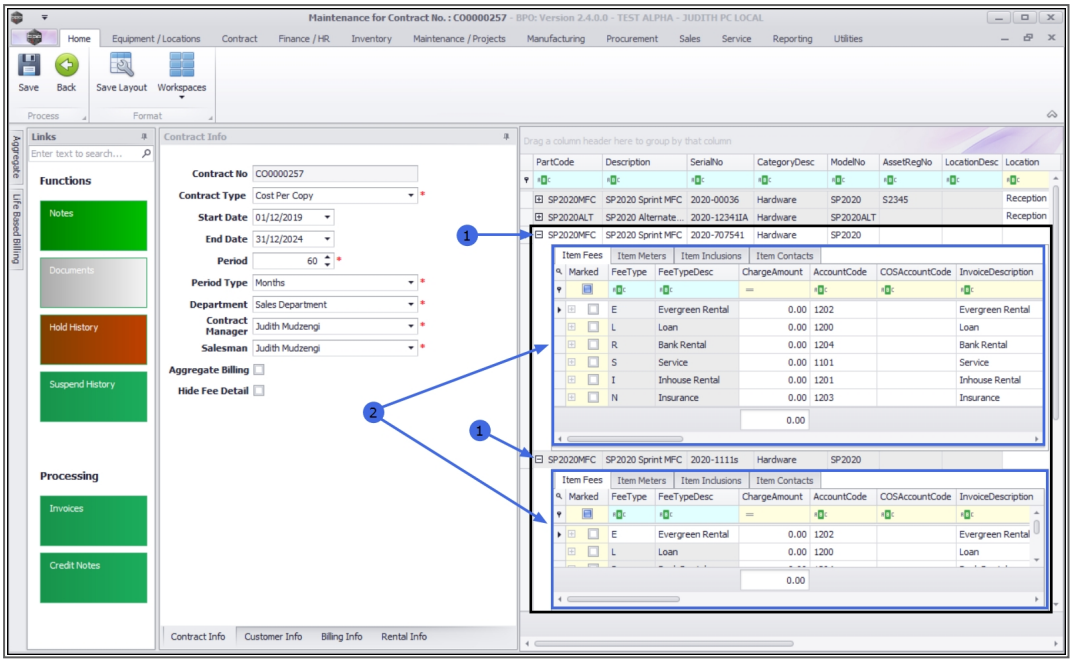

In this screen,

- 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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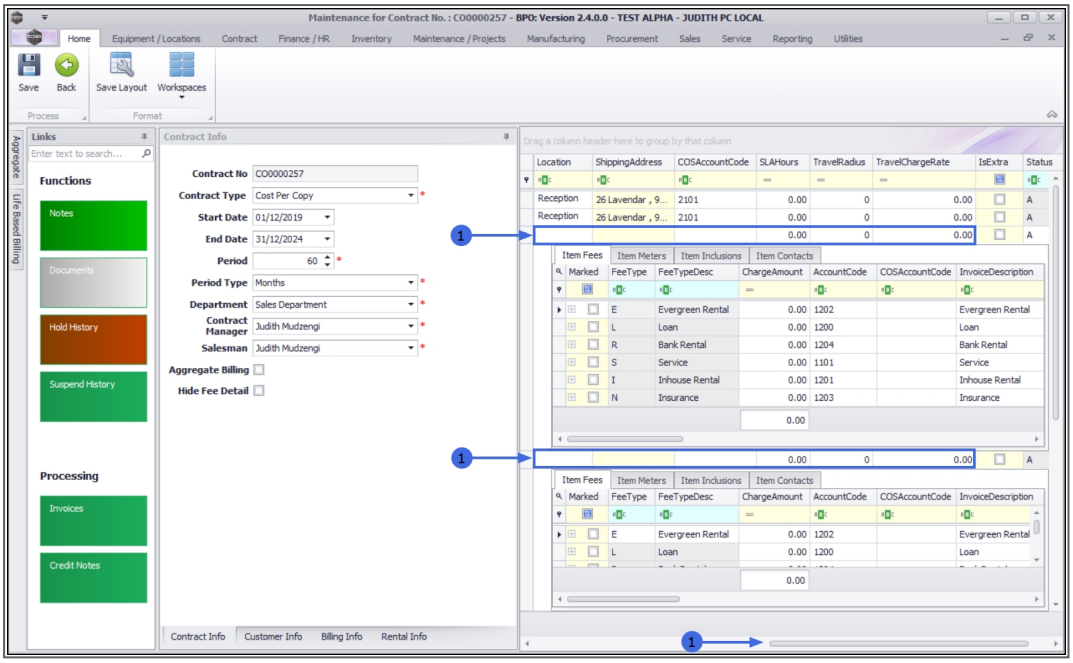
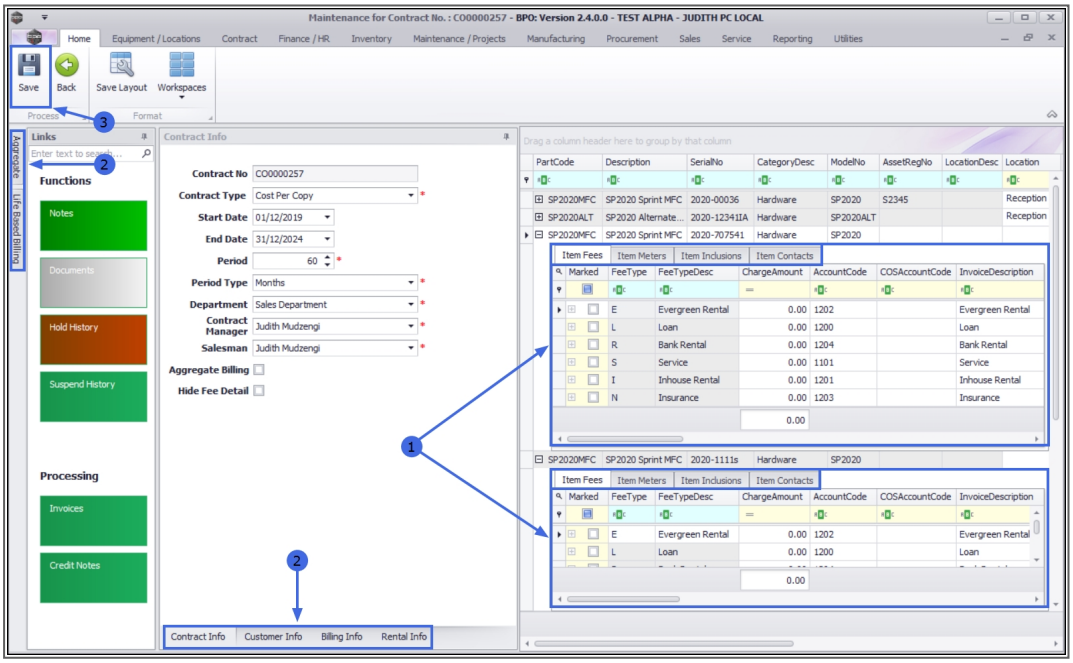


- You can input relevant data for the Parts (Equipment Item) frame.
- Leave the Contract Info Panel, Customer Info Panel and Billing Info Panel as is.
- Click on **Save**.



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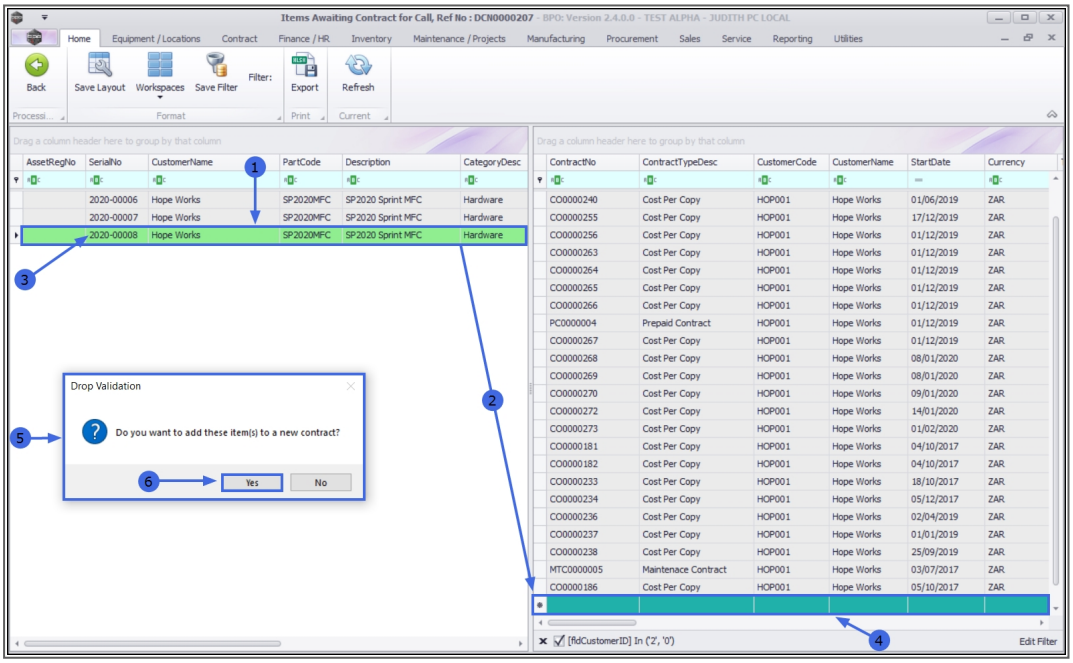
- The items will be linked to the **existing** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

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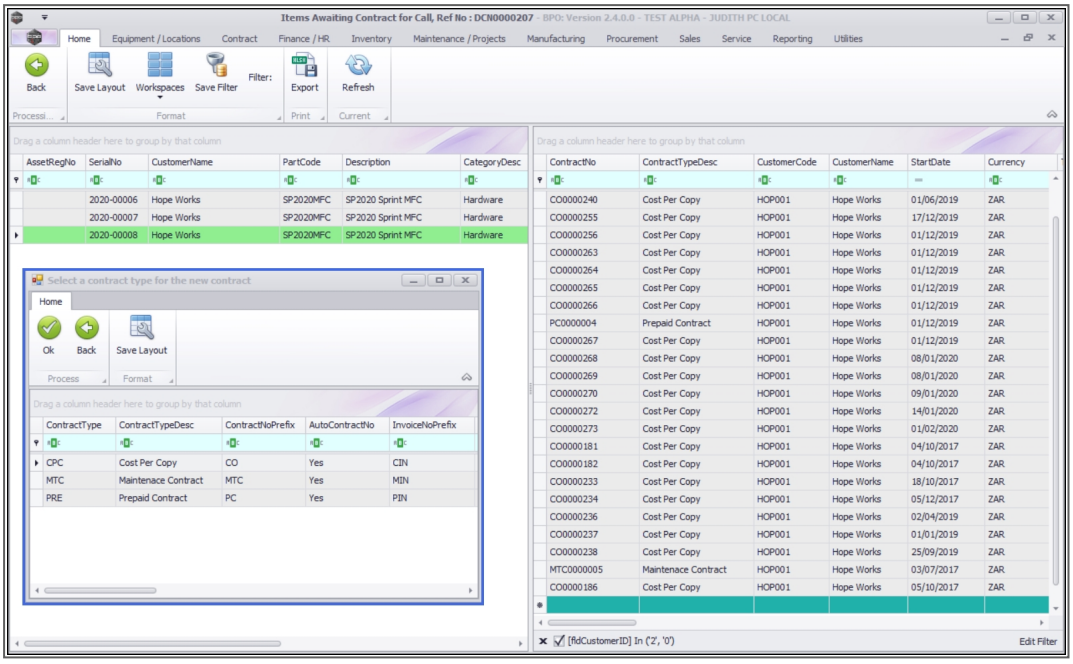
- The **Select a contract type for the new contract** screen will pop up.



- **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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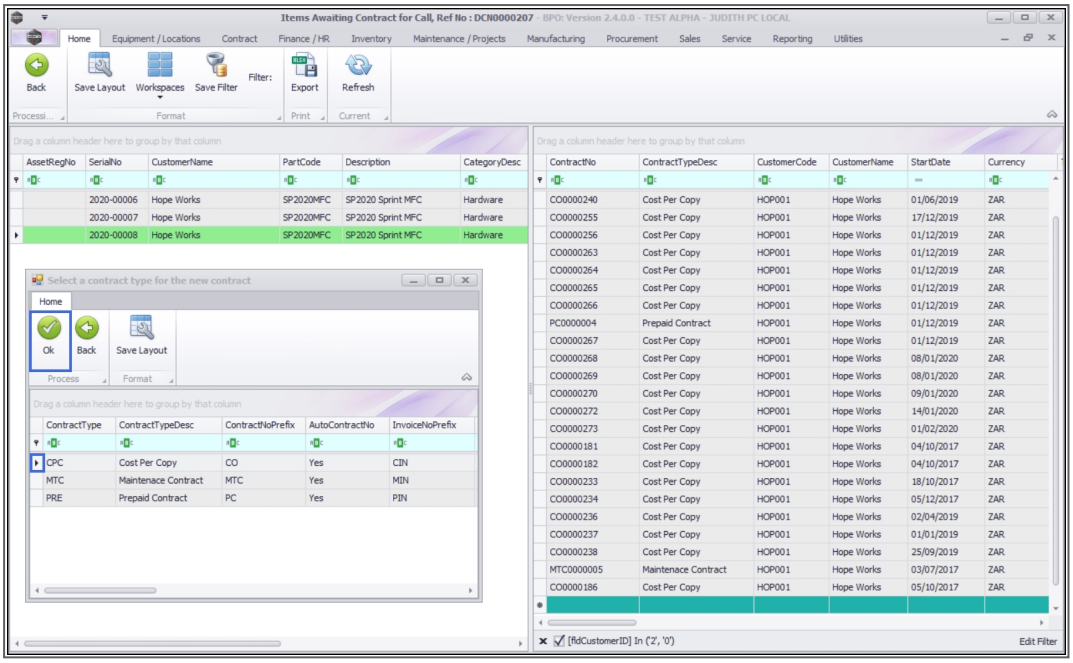

The **Add a new contract** screen will be displayed.

- 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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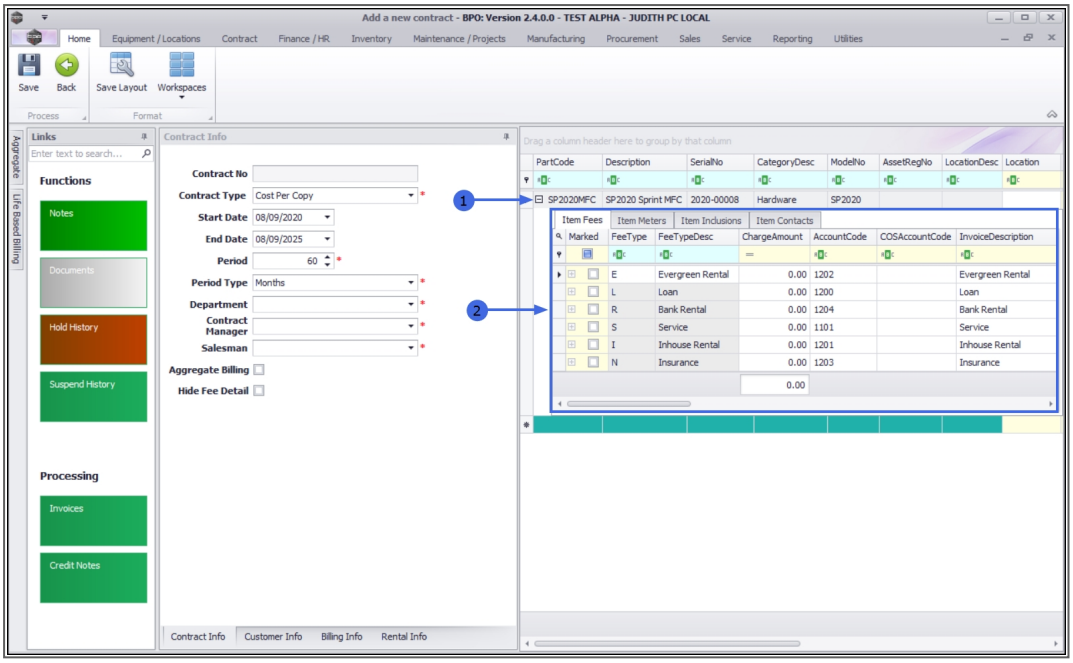

In this screen,

- 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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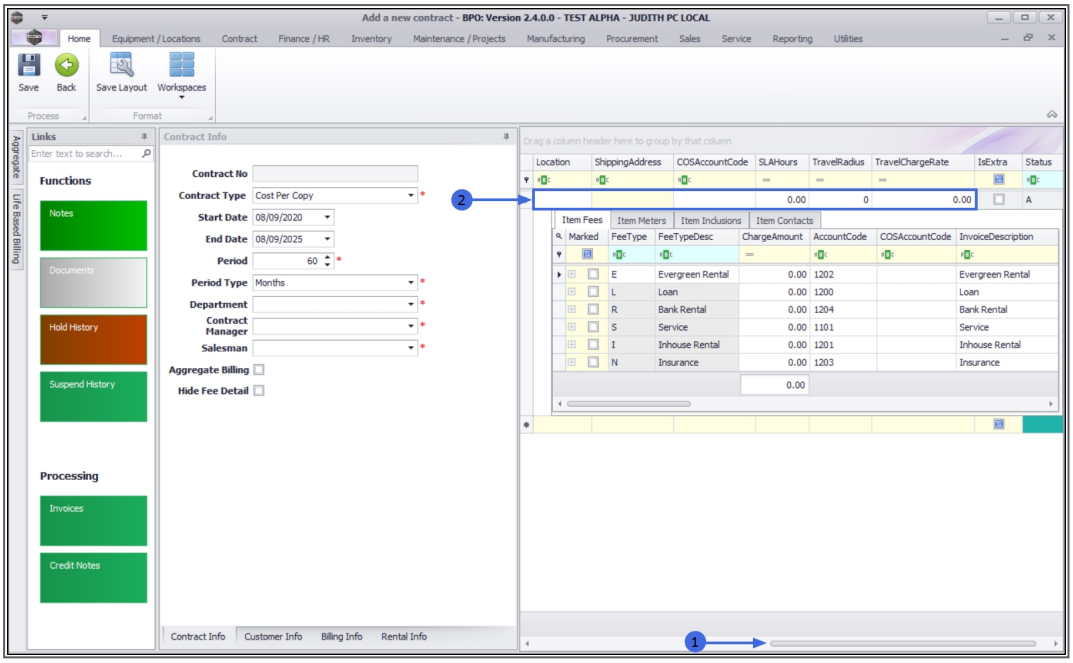

- You can input relevant data for the Part Item frame.
- Add the relevant contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel, (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- Click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

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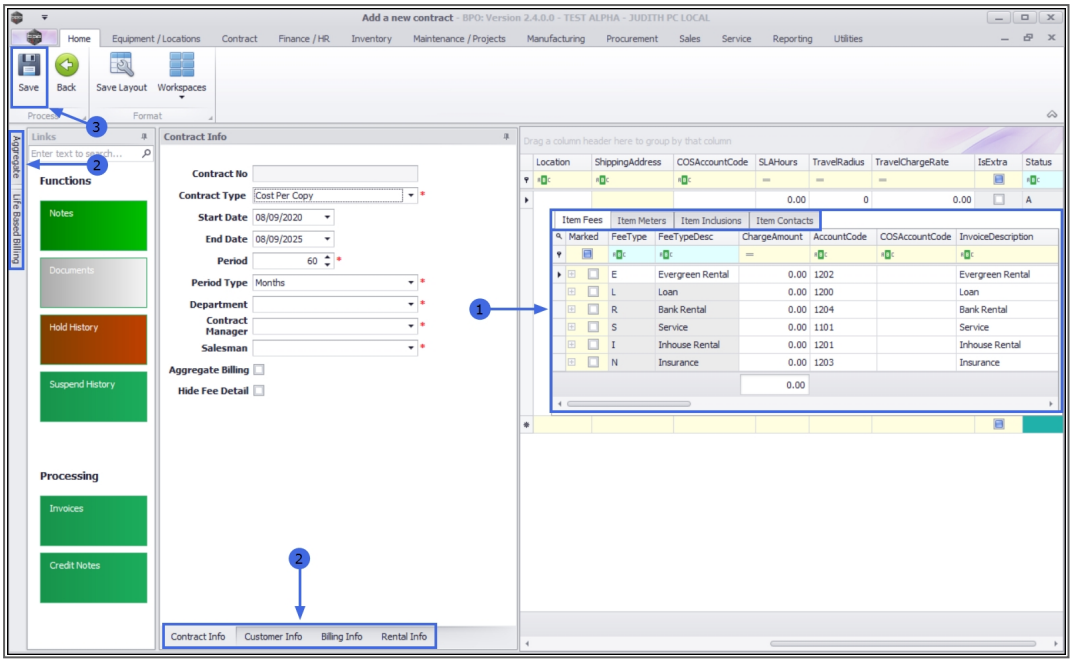

- The item will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

LINK MULTIPLE ITEMS TO A NEW CONTRACT

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. **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**.

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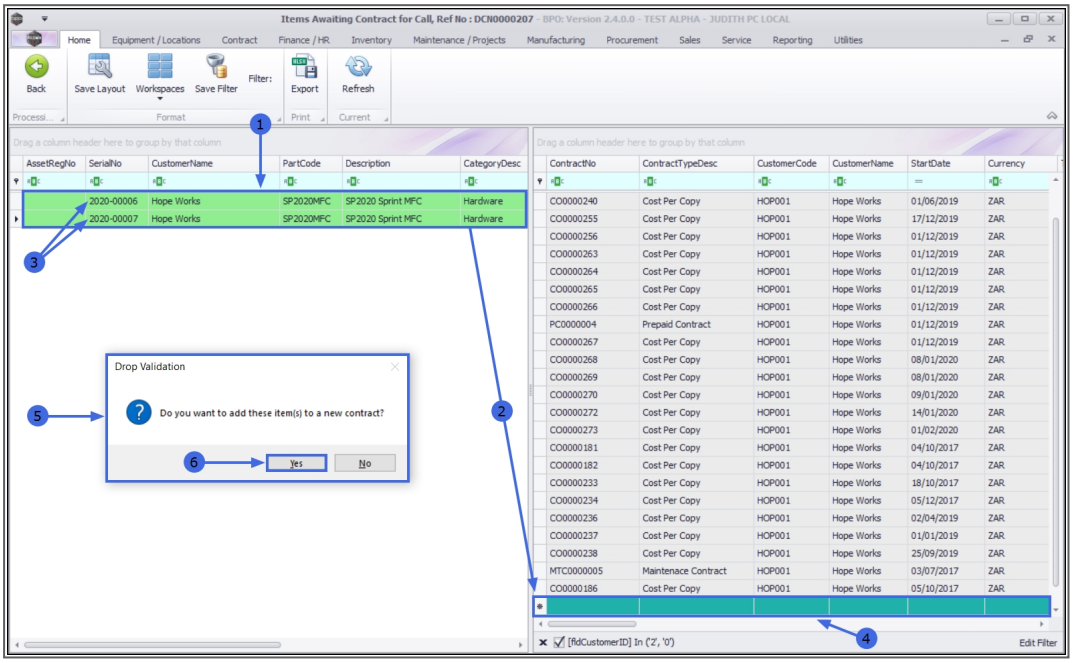
5. A **Drop Validation** message box will pop up asking;
    - **Do you want to add these items(s) to a new contract?**
6. Click on **Yes**.



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

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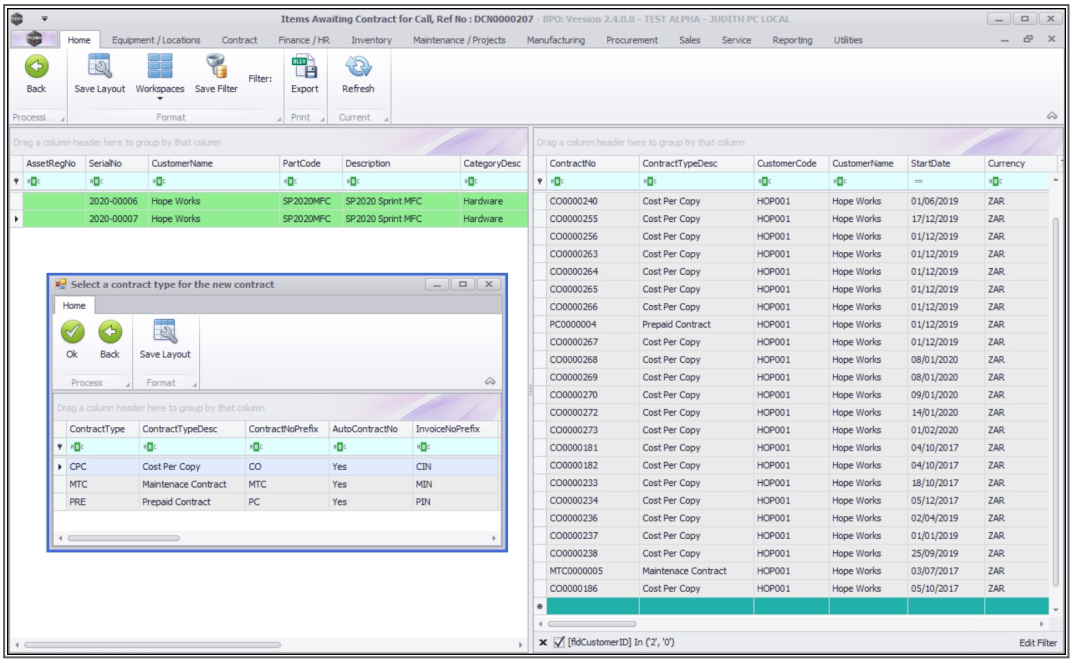
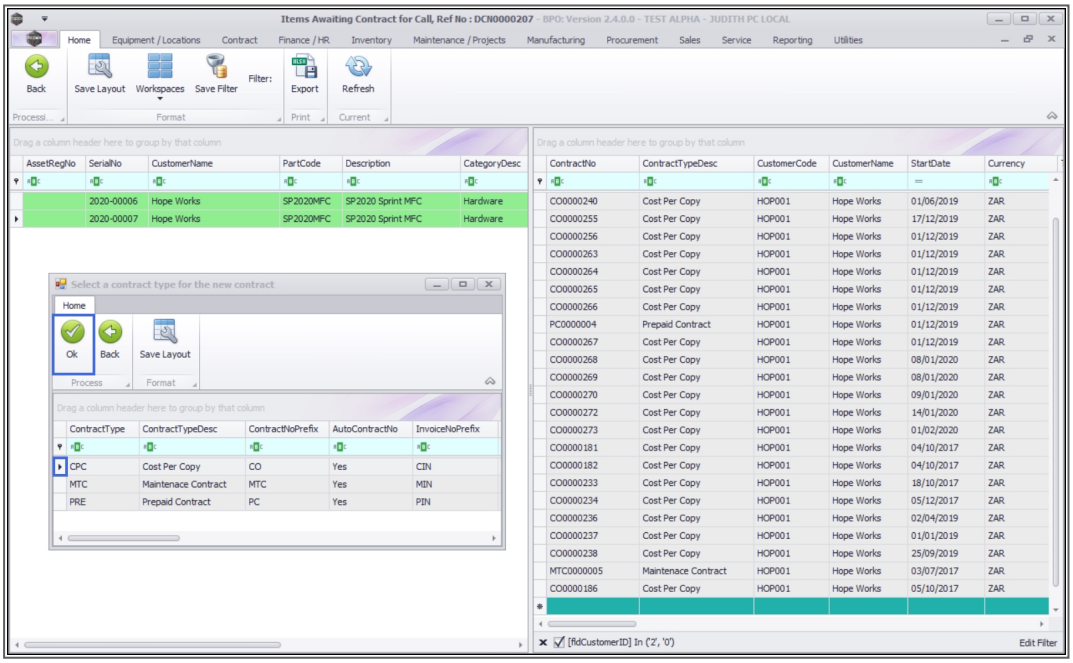


- **Click anywhere** in the **row** of the **contract type** you wish to add.
- Click on **OK**.
    - In this image, **CPC** - Cost Per Copy has been selected.



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

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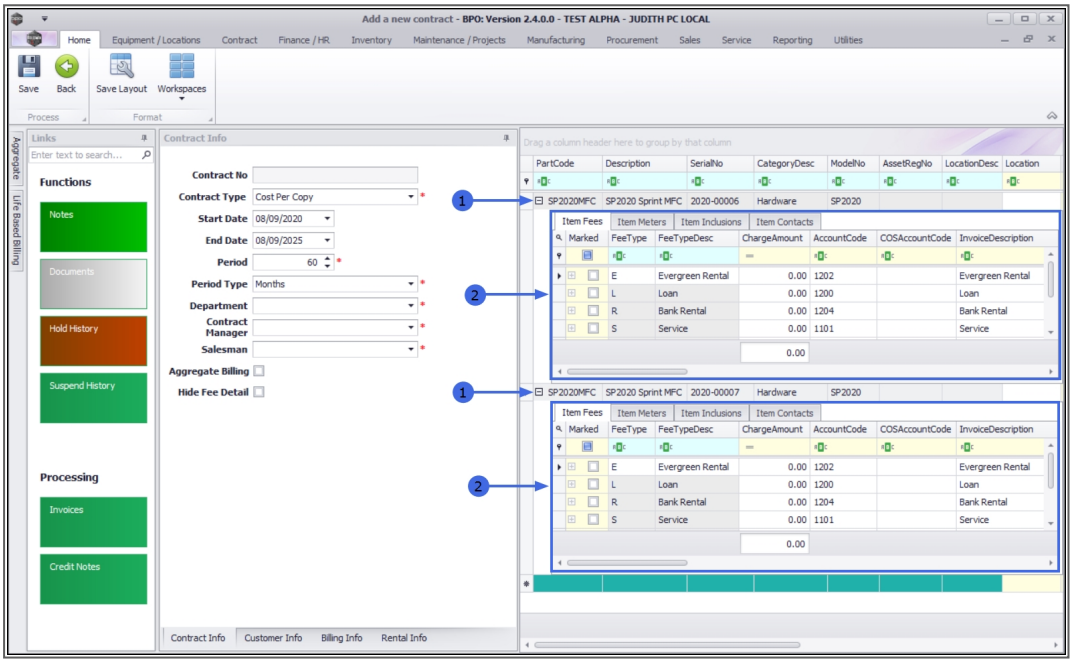
- The items that you are adding to the **new** contract will be listed in the **Parts** data grid.
- The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
    - Items Fees
    - Item Meters
    - Item Inclusions
    - Items Contacts



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

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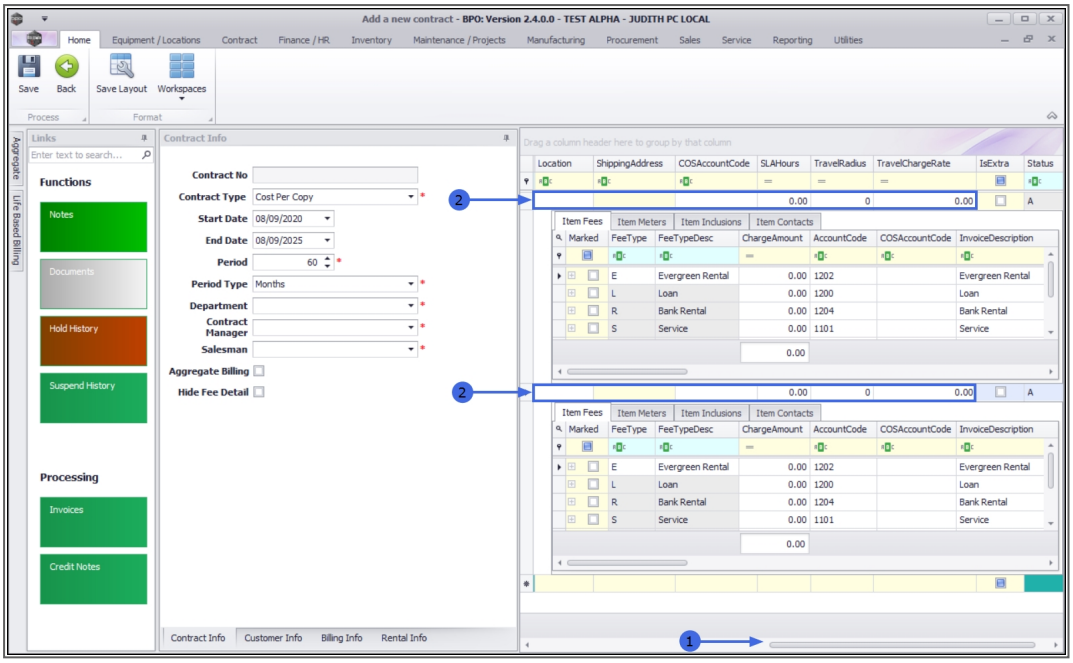

- You can input relevant data for the Parts Item frames.
- Add the **new** contract details to the; Contract Info Panel, Customer Info Panel, Billing Info Panel (Rental, Aggregate and Life Based Billing, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- Click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

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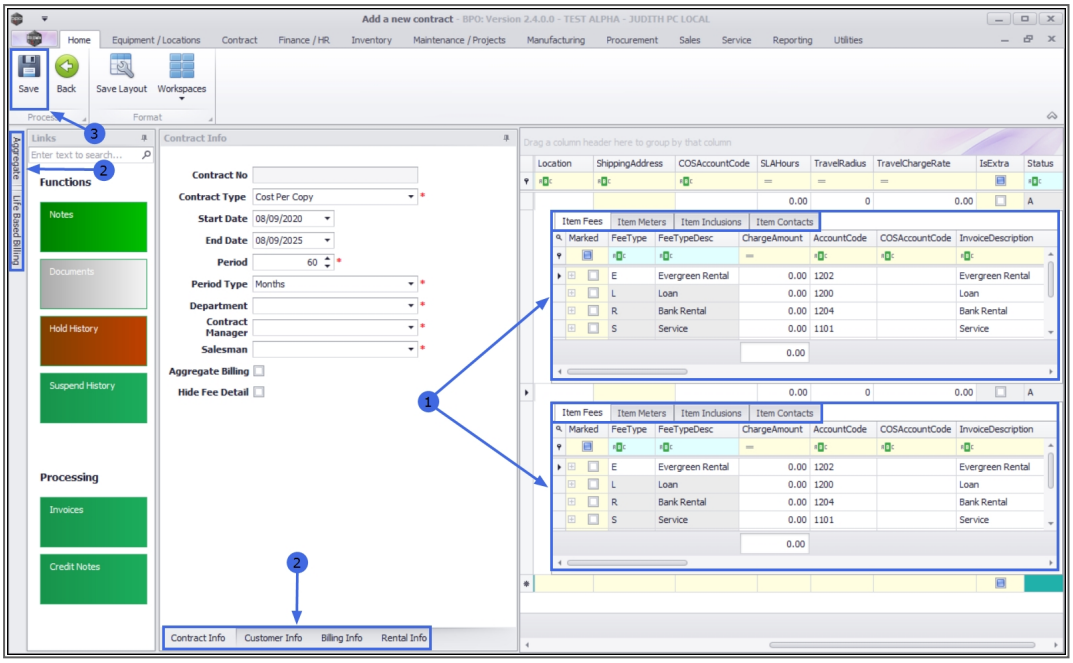

- The items will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

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