

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

## CONTRACT

### ESCALATION NOTIFICATIONS

The **Escalation Notification Service** must be installed, configured and running for this functionality.

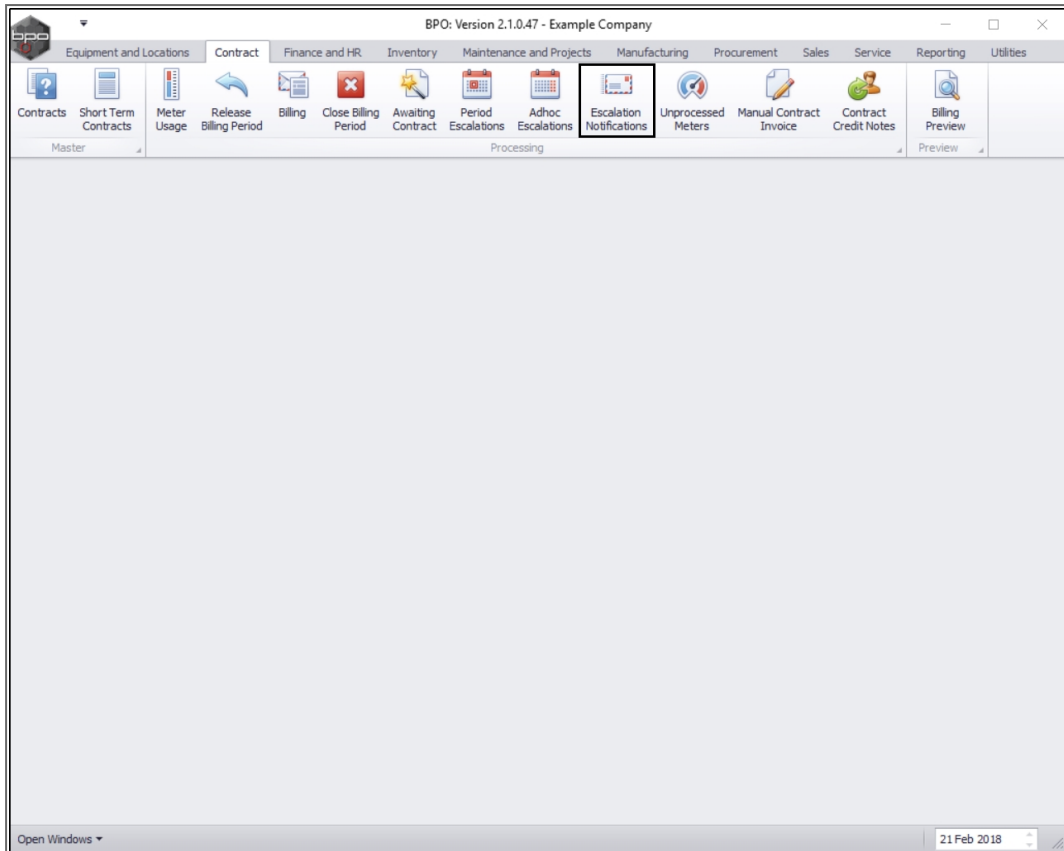
The escalation notification screen lists all contracts due for escalations in **3** months time.

The Notification is sent to the **Customer Invoice Delivery method** contact person, configured on the Customer.

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**Ribbon Access:** Sales > Orders

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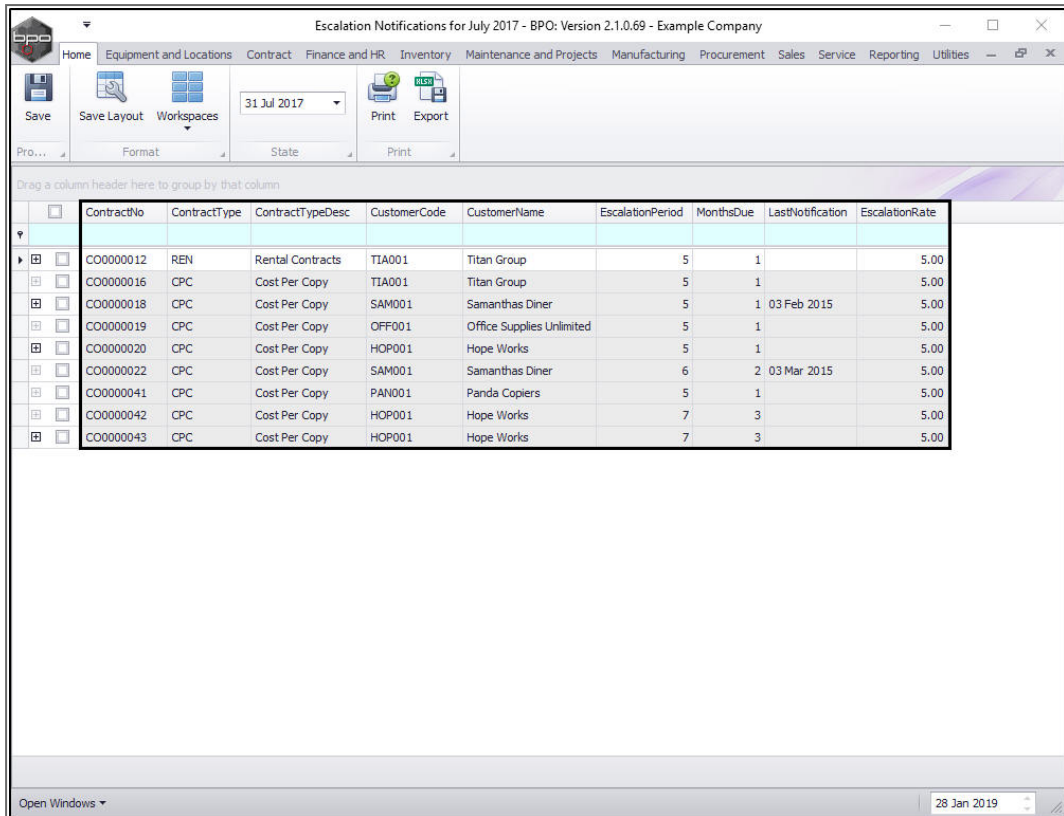


The **Escalation Notifications for [ ]** screen will be displayed.

## **NOTIFICATION SCREEN OVERVIEW**

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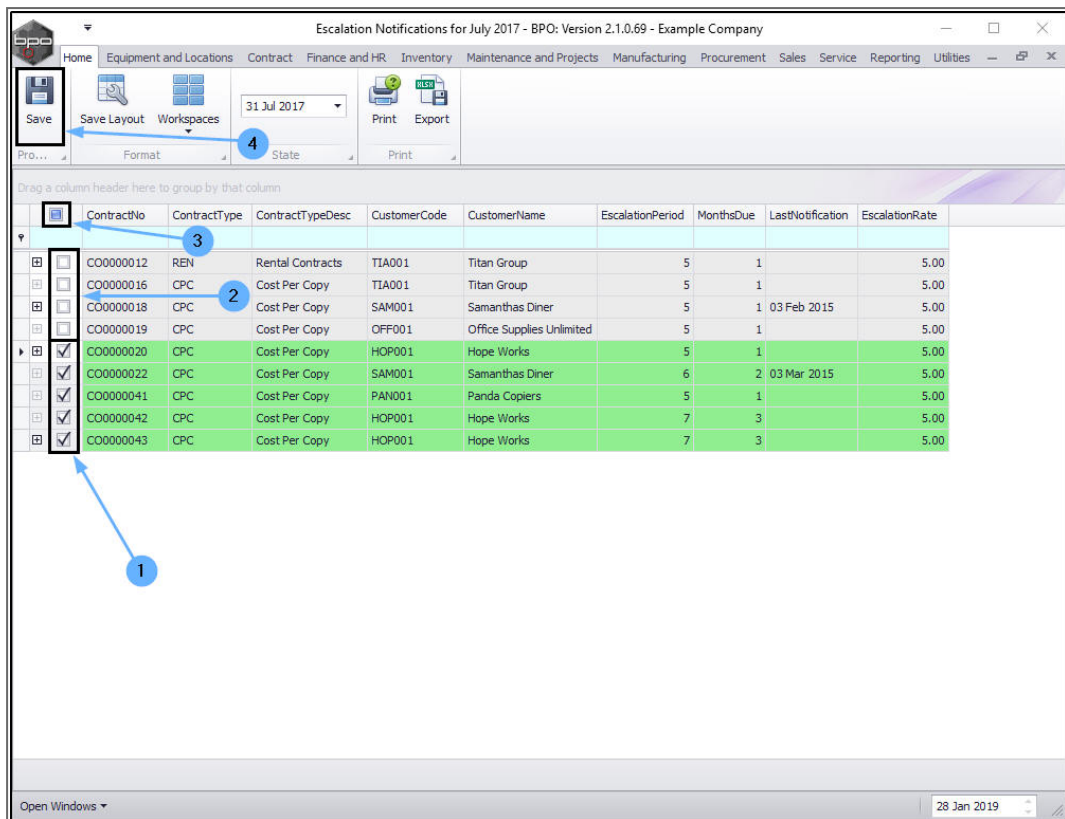
This screen will list **all** the contracts that are due to escalate in **3** months time.



	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
<input checked="" type="checkbox"/>	CO0000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
<input checked="" type="checkbox"/>	CO0000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
<input checked="" type="checkbox"/>	CO0000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
<input checked="" type="checkbox"/>	CO0000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
<input checked="" type="checkbox"/>	CO0000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1		5,00
<input checked="" type="checkbox"/>	CO0000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Mar 2015	5,00
<input checked="" type="checkbox"/>	CO0000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1		5,00
<input checked="" type="checkbox"/>	CO0000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00
<input checked="" type="checkbox"/>	CO0000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00

## SELECT CONTRACTS FOR NOTIFICATION

1. Click on the **check box** in the row of the **contract** where you wish to notify customers of any escalation.
2. Un-tick the check box in the row of the contract where you do not wish to notify the customer of any escalation.
3. You can also tick the **Select All** check box if you wish to notify customers for **all** contracts on the list or **un-tick** this check box if you do not wish to notify any customers.
4. When you have made your selections, click on **Save**.



## NOTIFICATION QUEUE

- A **Notification Process** message box will pop up informing you that;
  - The escalation notifications have been saved to the **Notification queue** for processing.
- Click on **OK**.

The screenshot shows the 'Escalation Notifications for July 2017 - BPO: Version 2.1.0.69 - Example Company' window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with Save, Save Layout, Workspaces, a date selector (31 Jul 2017), and Print/Export buttons. The main area contains a table with the following columns: ContractNo, ContractType, ContractTypeDesc, CustomerCode, CustomerName, EscalationPeriod, MonthsDue, LastNotification, and EscalationRate. The table lists several contracts, with some rows highlighted in green. A 'Notification Process' dialog box is open in the foreground, displaying an information icon and the message: 'The escalation notifications have been saved to the notification queue for processing.' with an 'OK' button.

ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
C00000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
C00000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
C00000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
C00000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1		5,00
C00000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Mar 2015	5,00
C00000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1		5,00
C00000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00
C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00

The **Escalation Notifications** screen will refresh.

1. **All** the check boxes will be cleared.
2. The **Last Notification** column will be updated to display the date that the notification(s) were sent to the Notification queue.

	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
<input type="checkbox"/>	C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	C00000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	C00000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
<input type="checkbox"/>	C00000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
<input type="checkbox"/>	C00000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1	03 Feb 2019	5,00
<input type="checkbox"/>	C00000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Feb 2019	5,00
<input type="checkbox"/>	C00000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1	03 Feb 2019	5,00
<input type="checkbox"/>	C00000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00
<input type="checkbox"/>	C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00

## PRINT THE ESCALATION NOTIFICATION LETTER

1. Select the **row** of the **Contract No.** where you wish to view the **Notification letter**.
2. Click on **Print**.

Escalation Notifications for July 2017 - BPO: Version 2.1.0.69 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Save Layout | Workspaces | 31 Jul 2017 | Print | Export

Pro... | Format | State | Print

Drag a column header here to group by that column

	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
<input type="checkbox"/>	C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	C00000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	C00000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
<input type="checkbox"/>	C00000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
<input type="checkbox"/>	C00000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1	03 Feb 2019	5,00
<input type="checkbox"/>	C00000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Feb 2019	5,00
<input type="checkbox"/>	C00000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1	03 Feb 2019	5,00
<input type="checkbox"/>	C00000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00
<input checked="" type="checkbox"/>	C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00

Open Windows | 28 Jan 2019

- A **Report Generation** message box will pop up asking;
  - Do you want to view the escalation notification of [ ]?
- Click on **Yes**.

	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
<input type="checkbox"/>	CO0000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	CO0000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	CO0000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
<input type="checkbox"/>	CO0000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
<input type="checkbox"/>	CO0000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1	03 Feb 2019	5,00
<input type="checkbox"/>	CO0000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Feb 2019	5,00
<input type="checkbox"/>	CO0000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1	03 Feb 2019	5,00
<input type="checkbox"/>	CO0000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00
<input checked="" type="checkbox"/>	CO0000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00

Report Generation

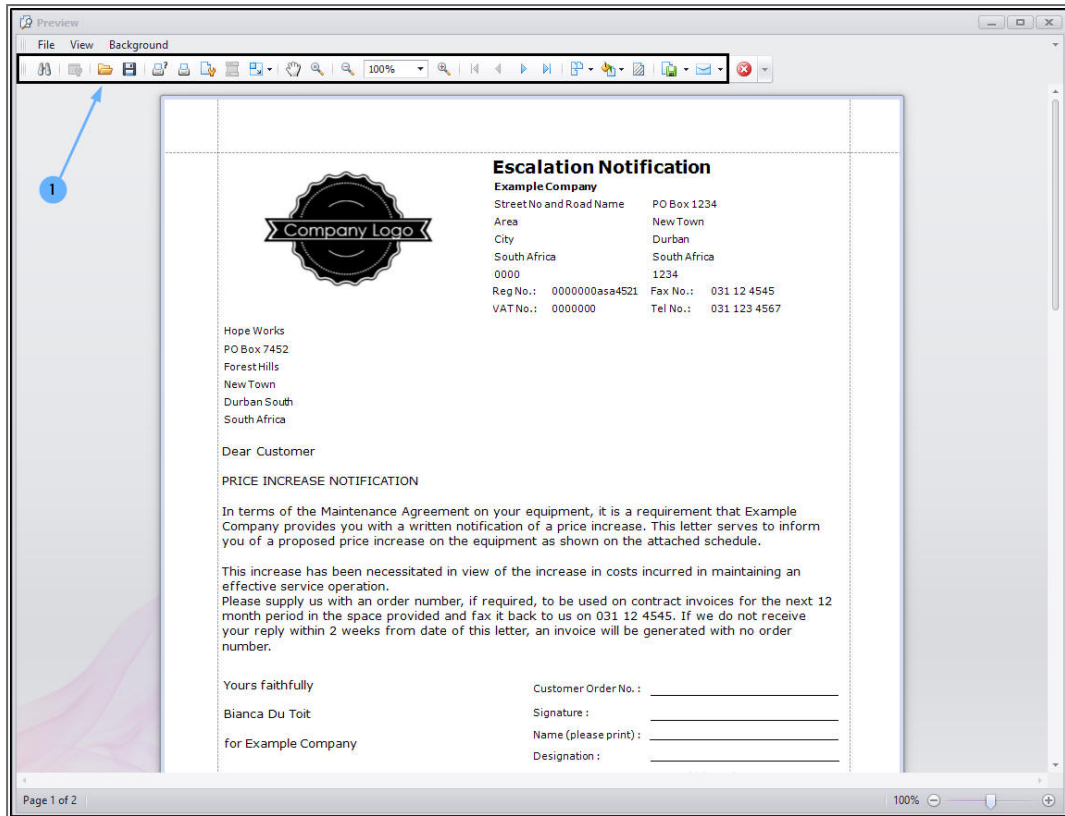
Do you want to view the escalation notification of CO0000043?

## ESCALATION NOTIFICATION LETTER (PAGE 1 EXAMPLE)

The **Report Preview** screen will be displayed.

1. From here you can **View, Print, Export** or **Email** the Escalation Notification.





## ESCALATION NOTIFICATION LETTER (PAGE 2 EXAMPLE)

2. In this second page, you can view the **Charge Description**, as well as the **Old Charge** amount and the **New Charge** amount.
3. **Close** the screen when you are done.

**Escalation Notification**  
**Example Company**

Street No and Road Name: PO Box 1234  
Area: New Town  
City: Durban  
South Africa: South Africa  
0000: 1234  
Reg No.: 0000000asa4521 Fax No.: 031 12 4545  
VAT No.: 0000000 Tel No.: 031 123 4567

Hope Works  
PO Box 7452  
Forest Hills  
New Town  
Durban South  
South Africa

**ATTACHMENT TO PRICE INCREASE NOTIFICATION - EQUIPMENT LISTING**  
*All rates quoted exclude VAT*

**Contract No.:** CO0000043  
**Effective Month:** 7  
**Account No.:** HOP001

**Model No.:** ZN122  
**Serial No.:** 12-98765  
**Tag No.:** AREG000061  
**Location:** Reception

**Contact:** Mandy Jefferson  
**Contact No.:** 031 255 1234  
**Customer:** Hope Works  
**Address:** Plot 91 Leaf Road  
Forest Hills  
New Town  
Durban South

Charge Description	Old Charge	Rate %	New Charge
Fees	250.00	5.00	262.50

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