

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

CONTRACTS

SHORT TERM CONTRACTS - CONTRACT CLOSURE

If there is an **equipment item** linked to the contract and there is a requirement to **collect** this item from the customer, <u>Machine return work order</u> process should be completed <u>before</u> closing the contract.

A Short Term Contract Invoice should also be created <u>before</u> a contract is closed. The system will prompt you if one has not been created.

On closing the contract, the system will **auto request the return** and move the items back to the **Internal Asset Warehouse**.

Ribbon Access: Contract > Short Term Contracts



The **Short Term Contract Listing** screen will be displayed.

- Select the **site** that you wish to work in.
- Select the **status** this should be set to **Active**.



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SELECT THE CONTRACT

• Select the **row** of the **contract** that you wish to **close**.

CHECK FOR RETURN ITEMS

• If you would like to check whether there are equipment items linked to this contract which must be returned to store, then first click on **Edit**.

Note: If you do not need to check for any linked items then you can skip the next **2** steps.



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- The Maintenance for Contract No.: [] screen will be displayed.
- Here you can see that there is a serialised equipment item linked to this contract.
- Make a note of the serial number and click on **Back** to return to the **Short Term Contract Listing** screen.



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Once you have followed the Create Machine Return WO process you can now close the contract.

- Select the **row** of the **contract** that you wish to **close**.
- Click on Close.



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CONFIRM CLOSURE

• A **Confirm** message box will pop up asking;

° Are you sure you want to close this contract?

• Click on Yes.



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CREATE INVOICE PROMPT

- If you haven't already created an invoice for this contract then the system will prompt you.
- A **Confirm** message box will pop up asking;
 - No invoice exists for this contract are you sure you want to close it?
- It is advisable at this stage to click on No and follow the <u>Create a</u> <u>Short Term Contract Invoice Process</u>, before attempting to close the contract.

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RECONFIRM CLOSURE

Once the invoice has been created,

- 1. Ensure that the **row** of the contract is still selected and click on **Close**.
- 2. When the **Confirm** message box pops up, select **Yes**.



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• The contract will now be **removed** from the **Short Term Contract Listing** screen where the **status** is set to **Active**.



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VIEW CLOSED CONTRACT

• The contract can now be found in the **Short Term Contract Listing** screen where the **status** is set to **Closed**.



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As explained in the **Introduction**, upon closing the contract, the system will **auto request the return** and move the items back to the **Internal Asset Warehouse**.

VIEW AUTO GENERATED RETURN REQUEST

• To see the result of this process, click on the **Service** tab.



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Ma	aintain		Process		Format	Print	Current						
												//	
													1
Contra	actNo +	ContractTy	pe ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodType
٩													
► STC00	000001	ST	Short Term Contracts	Hillcrest	HOP001	Hope Works	Tech	Technical	test	04 Jul 2018	06 Jul 2018	2	d
STC00	000004	ST	Short Term Contracts	Kloof	OFF001	Office Supplies Un			1478	17 Mar 2016	19 Mar 2016	2	d
STC00	000005	ST	Short Term Contracts	Hillcrest	SAM001	Samanthas Diner			1234	15 Mar 2016	05 Apr 2016	3	w
STC00	000006	ST	Short Term Contracts	Hillcrest	HOP001	Hope Works	Tech	Technical	7896	22 Mar 2016	24 Mar 2016	2	d
STC00	000007	ST	Short Term Contracts	Hillcrest	DER001	Derton Technologies			1235	22 Mar 2016	24 Mar 2016	2	d
STC00	80000	ST	Short Term Contracts	Hillcrest	OFF001	Office Supplies Un			741	22 Mar 2016	01 Apr 2016	10	d
STC00	00009	ST	Short Term Contracts	Bothas Shop	BOT0001	Bothas Networkin			1234	01 Apr 2016	03 Apr 2016	2	d
STC00	000010	ST	Short Term Contracts	Pinetown	TIA001	Titan Group				01 Apr 2016	03 Apr 2016	2	d
STC00	00011	ST	Short Term Contracts	Pinetown	PAN001	Panda Copiers				06 Apr 2016	08 Apr 2016	2	d
STC00	000012	ST	Short Term Contracts	Pinetown	TIN001	Tinas Coffee Shop			OR.7845	12 Apr 2016	14 Apr 2016	2	d
STC00	000014	ST	Short Term Contracts	Kloof	HOP001	Hope Works	Tech	Technical		22 Apr 2016	24 Apr 2016	2	d
STC00	000015	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2	d
STC00	000016	ST	Short Term Contracts	Forest Hills	HOP001	Hope Works	Tech	Technical		22 Apr 2016	24 Apr 2016	2	d
STC00	000017	ST	Short Term Contracts	Pinetown	SAM001	Samanthas Diner				25 Mar 2017	29 Jun 2017	96	d
STC00	000020	ST	Short Term Contracts	BPO2 Test 7	HOP001	Hope Works	Tech	Technical		14 Nov 2016	15 Nov 2016	1	d
STC00	00023	ST	Short Term Contracts	Kloof	HOP001	Hope Works	Tech	Technical	swap out	20 Jul 2017	23 Jul 2017	3	d
STC00	00025	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	test	14 Aug 2017	16 Aug 2017	2	d
STC00	000026	ST	Short Term Contracts	Durban Area	APP0001	Apple Juice Inc	Sales	Sales Department	1234	14 Aug 2017	16 Aug 2017	2	d

- The Service ribbon toolbar will be expanded.
- Click on the Work Orders button.



the state of the local division of the local				S	hort Term Cont	ract Listing - BPO: V	ersion 2.1.0.63 - Exar	mple Company			-		\times
0	Home	Equipment and	d Locations Contrac	t Finance an	d HR Invento	ry Maintenance an	d Projects Manufa	cturing Procuremen	t Sales	Service Rep	orting Utiliti	es —	₽ ×
Tech	Map Sche	eduling Current Activ	t Tech Technicians	Availability Exceptions	Calls Work Or	ders Service W Requests	IP Work Manageme	ent My Work My Orders	Tickets All Op Ticke	ben My Wor	rk		
Drag	a columo be	ader here to or	up by that column	4		rioceas		4 1104	ang	a open	*		
Co	ntractNo	ContractType	ContractTypeDesc	Location	CustomerCode	CustomerName	CustomerDeptCode	CustomerDeptName	OrderNo	StartDate	EndDate	Period	PeriodTyp
9													
 ST 	C0000001	ST	Short Term Contracts	Hillcrest	HOP001	Hope Works	Tech	Technical	test	04 Jul 2018	06 Jul 2018	2	d
ST	C0000004	ST	Short Term Contracts	Kloof	OFF001	Office Supplies Un			1478	17 Mar 2016	19 Mar 2016	2	d
ST	C0000005	ST	Short Term Contracts	Hillcrest	SAM001	Samanthas Diner			1234	15 Mar 2016	05 Apr 2016	3	w
ST	C0000006	ST	Short Term Contracts	Hillcrest	HOP001	Hope Works	Tech	Technical	7896	22 Mar 2016	24 Mar 2016	2	d
ST	C0000010	ST	Short Term Contracts	Pinetown	TIA001	Titan Group				01 Apr 2016	03 Apr 2016	2	d
ST	C0000011	ST	Short Term Contracts	Pinetown	PAN001	Panda Copiers				06 Apr 2016	08 Apr 2016	2	d
ST	C0000012	ST	Short Term Contracts	Pinetown	TIN001	Tinas Coffee Shop			OR7845	12 Apr 2016	14 Apr 2016	2	d
ST	C0000014	ST	Short Term Contracts	Kloof	HOP001	Hope Works	Tech	Technical		22 Apr 2016	24 Apr 2016	2	d
ST	C0000015	ST	Short Term Contracts	Derton Centre	DER001	Derton Technologies				22 Apr 2016	24 Apr 2016	2	d
ST	C0000016	ST	Short Term Contracts	Forest Hills	HOP001	Hope Works	Tech	Technical		22 Apr 2016	24 Apr 2016	2	d
ST	C0000017	ST	Short Term Contracts	Pinetown	SAM001	Samanthas Diner				25 Mar 2017	29 Jun 2017	96	d
ST	C0000007	ST	Short Term Contracts	Hillcrest	DER001	Derton Technologies			1235	22 Mar 2016	24 Mar 2016	2	d
ST	C0000008	ST	Short Term Contracts	Hillcrest	OFF001	Office Supplies Un			741	22 Mar 2016	01 Apr 2016	10	d
ST	C0000009	ST	Short Term Contracts	Bothas Shop	BOT0001	Bothas Networkin			1234	01 Apr 2016	03 Apr 2016	2	d
ST	C0000020	ST	Short Term Contracts	BPO2 Test 7	HOP001	Hope Works	Tech	Technical		14 Nov 2016	15 Nov 2016	1	d
ST	C0000023	ST	Short Term Contracts	Kloof	HOP001	Hope Works	Tech	Technical	swap out	20 Jul 2017	23 Jul 2017	3	d
ST	C0000025	ST	Short Term Contracts	Main	HOP001	Hope Works	Tech	Technical	test	14 Aug 2017	16 Aug 2017	2	d
ST	C0000026	ST	Short Term Contracts	Durban Area	APP0001	Apple Juice Inc	Sales	Sales Department	1234	14 Aug 2017	16 Aug 2017	2	d

The **Work Order Listing** screen will be displayed.

1. Here you can view the automatically created work order to **return the equipment item** from the contract.

VIEW AUTO-GENERATED ITEM RETURN

2. Click on the **Equipment and Locations** tab.



-	2 Work Order Listing - BPO: Version 2.1.0.63 - Exar	mple Company		- 🗆	\times
Home Equipment and Locations Cont	act Finance and HR Inventory Maintenance and Projects Ma	nufacturing P	rocurement S	ales Service Reporting Utilities -	8 x
	💫 🦾 Save Layout 😰 🔤 Durban	*		1	
	Workspaces - Open	- 1	Find WO	•	
Add Edit Delete View Close Com	olete Reinstate 😽 Save Filter Print Export 🚳 Refre	sh	R	leports	
Maintain Pro	ess Format Print	Current	Re	ports	
Links 0					
Enter text to search P	er here to group by that column				11
WOCode 🔻	Description	PartCode	SerialNo	PartDesc	CallReferen
Functions P	*				â
► WO0001689	Return machine from contract STC0000001 with serial no. test1234	SP2020	test1234	SP2020 Sprint Colour Multi Functional Copier	CN0000
Time 🖽 WO0001687	Return machine from contract STC0000028 with serial no. 1020-10102	SP1020	1020-10102	Copier	CN0000
E WO0001686	Return machine from contract STC0000028 with serial no. 2020-103053	SP2020	2020-103053	SP2020 Sprint Colour Multi Functional Copier	CN0000
E WO0001685	Return machine from contract STC0000029 with serial no. test121212	SP2020	test121212	SP2020 Sprint Colour Multi Functional Copier	CN0000
Services E WO0001684	Return machine from contract STC0000019 with serial no. 2020-102046	SP2020	2020-102046	SP2020 Sprint Colour Multi Functional Copier	CN0000
🗉 WO0001683	Return machine from contract STC0000019 with serial no. 1912-102045	SP19-123456	1912-102045	SP19-12 Colour Copier	CN0000
E WO0001682	Return machine from contract STC0000019 with serial no. 2020-102046	SP2020	2020-102046	SP2020 Sprint Colour Multi Functional Copier	CN0000
Third Party Services U00001681	Return machine from contract STC0000019 with serial no. 1912-102045	SP19-123456	1912-102045	SP19-12 Colour Copier	CN0000
E WO0001680	Return machine from contract STC0000019 with serial no. 2020-102046	SP2020	2020-102046	SP2020 Sprint Colour Multi Functional Copier	CN0000
■ WO0001679	Return machine from contract STC0000019 with serial no. 1912-102045	SP19-123456	1912-102045	SP19-12 Colour Copier	CN0000
Parts	Return machine from contract STC0000028 with serial no. 1020-10102	SP1020	1020-10102	Copier	CN0000
🗉 WO0001672	Copier to be repaired	SP2020	2020-9193	SP2020 Sprint Colour Multi Functional Copier	
WO0001671 WO0001671	Machine faulty, loan unit requested.	SP2020	2020-103056	SP2020 Sprint Colour Multi Functional Copier	CN0000
E WO0001670	Machine repair required, loan unit requested.	SP2020	888888	SP2020 Sprint Colour Multi Functional Copier	
Loans 🕀 W00001669	Rollers need replacing.	1020-478	478-1011	Staple Unit	
WO0001668	SP240 New Deal.				
E WO0001667	Drum requested, machine needs cleaning.	2020-856	2020-2222	Drum	
Swap Outs 🗉 WO0001665	Early Service Request - machine jamming.	SP2020	2020-8081	SP2020 Sprint Colour Multi Functional Copier	
WO0001664 WO0001664	Toner check and clean required	SP2020	2020-103053	SP2020 Sprint Colour Multi Functional Copier	CN0000
WO0001663	Copier to be repaired	SP1919	19-12345	SP1919 Sprint Colour MFC	
Meters E WO0001661	Created for production batch -				
• WO0001660	Created for production batch -				
₩ WO0001658	ndr 10				CN0000 -
Expenses					_
		_			÷
Open Windows 🕶				24 Jul 2018	÷ //

- The Equipment and Locations ribbon toolbar will be expanded.
- Click on the **Assets** button.



👞 🔻 Work Order Listing - BPO: Version 2.1.0.63 - Example Company — 🗆									
Home Equipment a	nd Locations Cont	ract Finance and HR Inventory Maintenance and Projects Ma	nufacturing P	rocurement	Sales Service Reporting Utilities —	ъх			
Assets Deprediation	tional tions								
tiples a									
Einks #						11			
	WOCode 🔻	Description	PartCode	SerialNo	PartDesc	CallReferer			
Functions	9								
	🗉 WO0001689	Return machine from contract STC0000001 with serial no. test1234	SP2020	test1234	SP2020 Sprint Colour Multi Functional Copier	CN0000			
Time	₩O0001687	Return machine from contract STC0000028 with serial no. 1020-10102	SP1020	1020-10102	Copier	CN0000			
	1 WO0001686	Return machine from contract STC0000028 with serial no. 2020-103053	SP2020	2020-103053	SP2020 Sprint Colour Multi Functional Copier	CN0000			
	🖭 WO0001685	Return machine from contract STC0000029 with serial no. test121212	SP2020	test121212	SP2020 Sprint Colour Multi Functional Copier	CN0000			
Services	⊞ WO0001684	Return machine from contract STC0000019 with serial no. 2020-102046	SP2020	2020-102046	SP2020 Sprint Colour Multi Functional Copier	CN0000			
	· WO0001683	Return machine from contract STC0000019 with serial no. 1912-102045	SP19-123456	1912-102045	SP 19-12 Colour Copier	CN0000			
	E WO0001682	Return machine from contract STC0000019 with serial no. 2020-102046	SP2020	2020-102046	SP2020 Sprint Colour Multi Functional Copier	CN0000			
Third Party Services	· WO0001681	Return machine from contract STC0000019 with serial no. 1912-102045	SP19-123456	1912-102045	SP19-12 Colour Copier	CN0000			
		Return machine from contract STC0000019 with serial no. 2020-102046	SP2020	2020-102046	SP2020 Sprint Colour Multi Functional Copier	CN0000			
	E WO0001679	Return machine from contract STC0000019 with serial no. 1912-102045	SP19-123456	1912-102045	SP19-12 Colour Copier	CN0000			
Parts	WO0001678	Return machine from contract STC0000028 with serial no. 1020-10102	SP1020	1020-10102	Copier	CN0000			
	E WO0001672	Copier to be repaired	SP2020	2020-9193	SP2020 Sprint Colour Multi Functional Copier				
	WO0001671	Machine faulty, loan unit requested.	SP2020	2020-103056	SP2020 Sprint Colour Multi Functional Copier	CN0000			
19000000	🗉 WO0001670	Machine repair required, loan unit requested.	SP2020	888888	SP2020 Sprint Colour Multi Functional Copier				
Loans		Rollers need replacing.	1020-478	478-1011	Staple Unit				
	⊞ WO0001668	SP240 New Deal.							
	🗉 WO0001667	Drum requested, machine needs cleaning.	2020-856	2020-2222	Drum				
Swap Outs	E WO0001665	Early Service Request - machine jamming.	SP2020	2020-8081	SP2020 Sprint Colour Multi Functional Copier				
	₩O0001664	Toner check and clean required	SP2020	2020-103053	SP2020 Sprint Colour Multi Functional Copier	CN0000			
	E WO0001663	Copier to be repaired	SP1919	19-12345	SP 1919 Sprint Colour MFC				
Meters	III WO0001661	Created for production batch -							
	E WO0001660	Created for production batch -							
	🗉 WO0001658	ndr 10				CN0000 -			
Expenses	4 🤇		_		24 Jul 2018	+			
open millions .					24 Jul 2010				

The Machine List for [] screen will be displayed.

- 1. Ensure that you have selected the relevant **site** and **status** linked to the equipment item that you are tracking.
- 2. Use the **filter row** and type in the serial number of the equipment item (that you noted in step **3**).



	Ŧ					Mach	ine List for Dur	ban - BPO: Versio	n 2.1.0.63	- Example Cor	npany				- 🗆	\times
0	Home	Equipment	and Locatio	ns Contra	act Finan	ce and HR	Inventory	Maintenance and P	rojects I	Manufacturing	Procurement	Sales S	ervice Repo	rting	Utilities —	日)
Add	Edit	Delete	View Sa	ve Layout	Workspaces	Save Filter	Durban	• Refres	h Reval	ue Convert	Buy Back Pr	nt Export	Reports			
	Mainten	ance			Format	/		urrent	-	Process		Print	Reports			
to ba		idi ide			I UTINGE	0	4	Annene	2	Process		FILLS	a Reports	4	17	
inter te	ext to sea	rch P	Drag a co													
		/	Descri	otion			PartCode	SerialNo 🕨	ModelNo	AssetRegNo	CustomerNa	DeptName	StartDate	Status	CategoryDesc	IsFixe
Fund	ctions		۴													
			SP202	D Sprint Colo	ur Multi Funi	ctional Copier	SP2020	20-12345	SP2020	123	Hope Works	Technical	27 Jan 2015	A	Hardware	No
wo	0 History		SP1919 Sprint Colour MFC SP1919 Sprint Colour MFC		SP1919	19-12345 19-90201	1919 1919		Derton Tech		07 Apr 2014 09 Apr 2014	A A	Hardware Hardware	No No		
					SP1919				Office Suppli							
			K147 Kyocera Colour Copier		1458-96523	K147-123456789	K147		Office Suppli		06 May 2014	A	Kyocera Mul	No		
Pro	Project History		Kruger	ZN Fax Mad	hine		KZN-122TFB	sin 12345568	ZN122		Young Electric	Sales De	06 May 2014	A	Hardware	No
			K147 Kyocera Colour Copier		1458-96523	sin123	K147		Young Electric	Sales De	06 May 2014	A	Kyocera Mul	. No		
			K147 H	yocera Color	ur Copier		1458-96523	14-9652365	K147		Westwood		07 May 2014	A	Kyocera Mul	No
Meters	SP202	D Sprint Colo	ur Multi Fun	ctional Copier	SP2020	abc147c	SP2020		Derton Tech		07 May 2014	A	Hardware	No		
			K1471	yocera Color	ur Copier		1458-96523	SIN32413546	K147		Hope Works	Technical	19 Jul 2017	A	Kyocera Mul	No
			SP19-	12 Colour Cop	pier		SP19-123456	SP19-12185274	SP19-12		Titan Group		13 Jun 2014	A	Hardware	No
100			SP19-	12 Colour Cop	pier		SP19-123456	19-12/1201	SP19-12		Titan Group		17 Jun 2014	A	Hardware	No
nis	tory		SP 19-	12 Colour Cop	pier		SP19-123456	19-12/1202	SP19-12		Samanthas		17 Jun 2014	A	Hardware	No
			SP19-	12 Colour Cop	pier		SP19-123456	1912-102031	SP19-12		Samanthas		02 Jul 2014	A	Hardware	No
			SP 19-	12 Colour Cop	pier		SP19-123456	1912-102032	SP19-12		Bothas Net		02 Jul 2014	A	Hardware	No
BO	м		SP202	O Sprint Colo	ur Multi Funi	ctional Copier	SP2020	2020-102047	SP2020		Dancing Shoes		21 Jun 2017	A	Hardware	No
			SP 19-	12 Colour Cop	pier		SP19-123456	1912-102034	SP19-12		Danny Stor		02 Jul 2014	A	Hardware	No
			SP19-	12 Colour Cop	pier		SP19-123456	1912-102035	SP19-12		Office Suppli		02 Jul 2014	A	Hardware	No
Wa	arranties	1	SP19-	12 Colour Cop	pier		SP19-123456	1912-102036	SP19-12		Westwood		02 Jul 2014	A	Hardware	No
			SP202	D Sprint Colo	ur Multi Funi	ctional Copier	SP2020	2020-10201	SP2020		Titan Group		02 Jul 2014	A	Hardware	No
			SP202	D Sprint Colo	ur Multi Fun	ctional Copier	SP2020	2020-10202	SP2020		Office Suppli		02 Jul 2014	A	Hardware	No
Notes		SP202	0 Sprint Colo	ur Multi Fun	ctional Copier	SP2020	2020-10203	SP2020		Westwood		02 Jul 2014	A	Hardware	No	
			SP202	O Sprint Colo	ur Multi Funi	ctional Copier	SP2020	2020-10204	SP2020		Office Suppli		02 Jul 2014	A	Hardware	No
			SP202	0 Sprint Colo	ur Multi Fun	ctional Copier	SP2020	2020-10205	SP2020		Bothas Net		02 Jul 2014	A	Hardware	No
De	amente		SP202	0 Sprint Colo	ur Multi Fun	ctional Copier	SP2020	2020-102049	SP2020		Big Bargains		03 Jul 2014	A	Hardware	No
000	coments															

- The system will search for and find the item.
- 1. Here you can see that the item has been **returned** to the **Asset Ware-house**.

VIEW WORK ORDER HISTORY

2. Click on the **WO History** tile.



	Ŧ					Machir	ne List for Du	urban - BPC	D: Versior	n 2.1.0.63	- Example Cor	mpany			-		<
0	Home	Equipme	nt and L	ocations Cont	tract Financ	ce and HR	Inventory	Maintenan	ce and Pro	ojects I	Manufacturing	Procurement	Sales Se	rvice Repo	rting Utilities	- 8	х
4		×		2			Durban	•	2	1			9	1			
Add	Edit	Delete	View	Save Layout	Workspaces	Save Filter	All	•	Refresh	n Reval	ue Convert	Buy Back P	int Export	Reports			
	Mainter	ance			Format			Current			Process		Print	Reports			
Links		ion rue		4	Turner		4	Annlie	ed Filter	· Contain	s([SerialNo]	'test1234')	F1016 4	Reports	4		
Enter t	ext to sea	rch	ρ						Cu I neci	- concom	o([ocidano])						-
Fun	ctions			Description			PartCode	SerialNo	Ŷ	ModelNo	AccetRechio	CategoryDeer	TeEivadAccat	ParentTune	OuctomerName	DeptName	
	cuons		-	Description			Faitcode	test1234		Hodeirio	Asservegno	CategoryDeac	13i IACUASSCU	Foreitcrype	Castomerivanie	Depuvanie	: 5
W				SP2020 Sprint Co	lour Multi Func	tional Copier	SP2020	test1234		SP2020	AREG000038	Hardware	Yes	WHSE			1
		*											R.	1			
	oject Histo													/			
	ojeccimoto			2									\	/			
Me	eters																
PUS	story																
вс	M																
W	arranties																
No	otes																
-																	
Do	cuments		x	Contains([Se	rialNo], 'test12	2341) 🔻										Edit Fi	iter ,
Open V	Vindows -														24 Jul 20	18 0	1

The Work Orders for [] screen will be displayed.

 Here you can see that the item was linked to a short term contract work order (WO0001690) and is now linked to a return machine work order (WO0001699).





RETURN TO THE CONTRACT LISTING SCREEN

- 1. Click on the drop-down arrow in the Open Windows tab.
- 2. Select from the list, the **Short Term Contract Listing** window where this process was started.





MNU.158.006

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