

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

## CONTRACT

### ADD CONTRACT ITEM INCLUSIONS

You will be following the process below to add each item to be linked to this contract, where Inclusions apply.

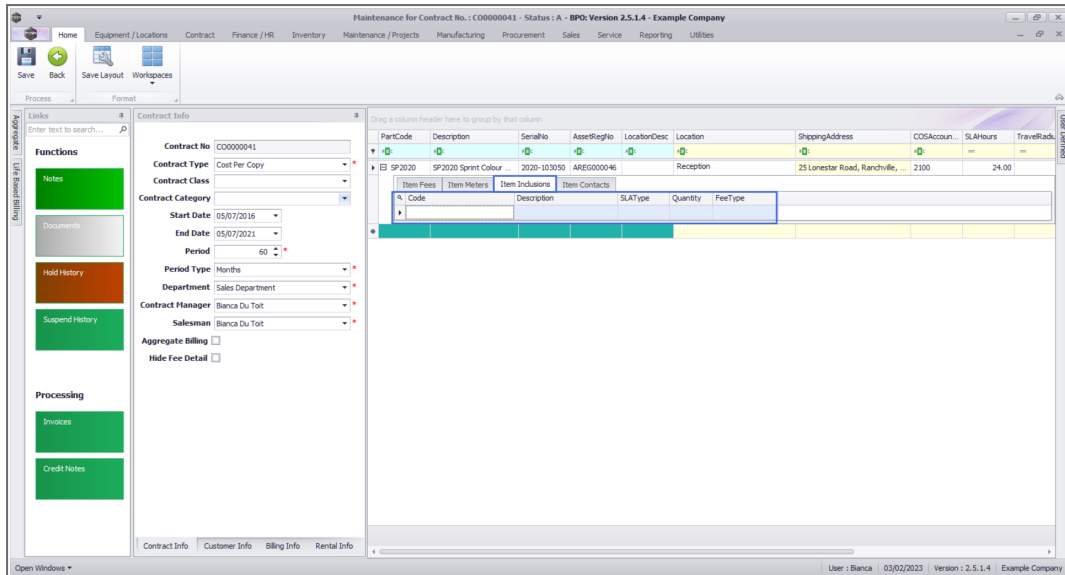
#### Item Inclusions Frame

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- Click on the **Item Inclusions** tab.

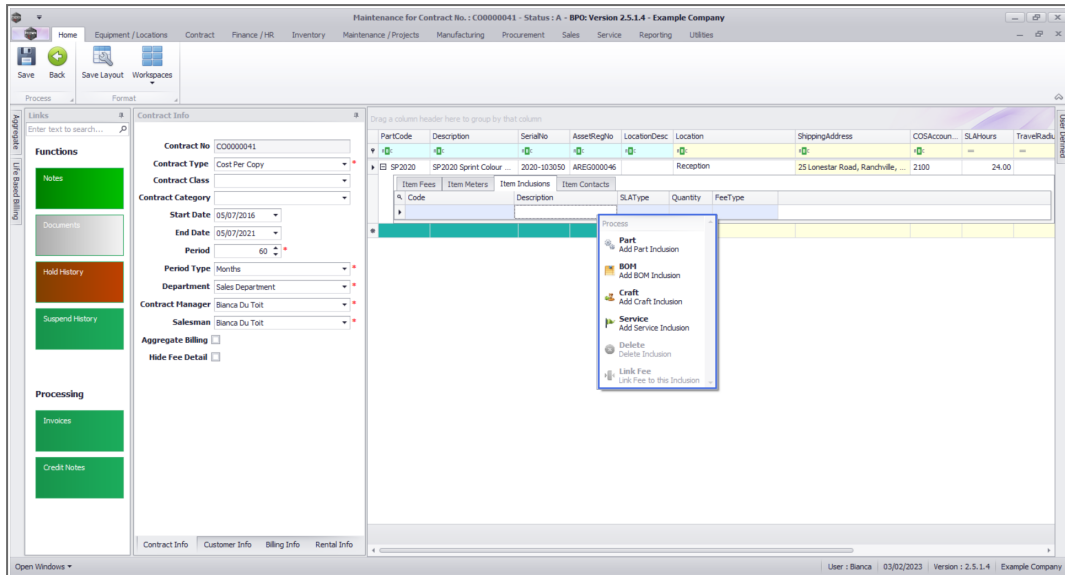
The **Item Inclusions** frame will be expanded.

- In the **Item Inclusions** frame, you can add all **.png Inclusions** (items which are included in the .png and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically “included” in the .png and are covered by a set .png fee agreed between the customer and service provider.
- Although they are included, you can have a breakdown of each individual inclusion. This breakdown is achieved by utilising the **Link Fee** panel within the Item Inclusion panel. For more information, refer to the **Link Fee** topic.



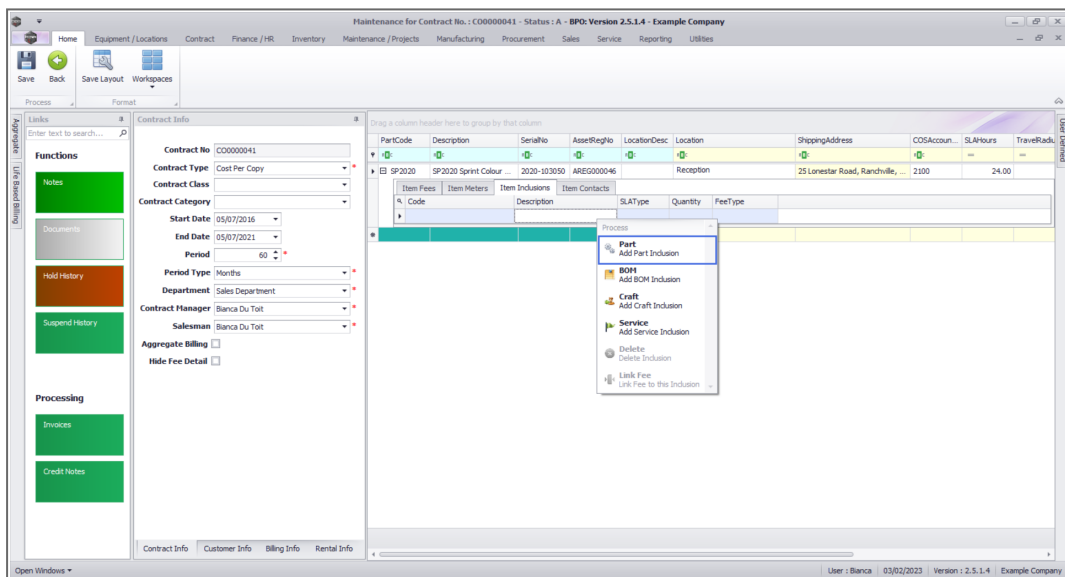
## Add Item Inclusions

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- A **Process** menu will pop up with the following options:
  - **Part:** [Add Part Inclusion](#)
  - **BOM:** [Add Bill Of Materials Inclusion](#)
  - **Craft:** [Add Craft Inclusion](#)
  - **Service:** [Add Service Inclusion](#)
  - **Link Fee:** [Link A Fee To An Inclusion](#)
  - **Delete:** [Delete Inclusion](#)

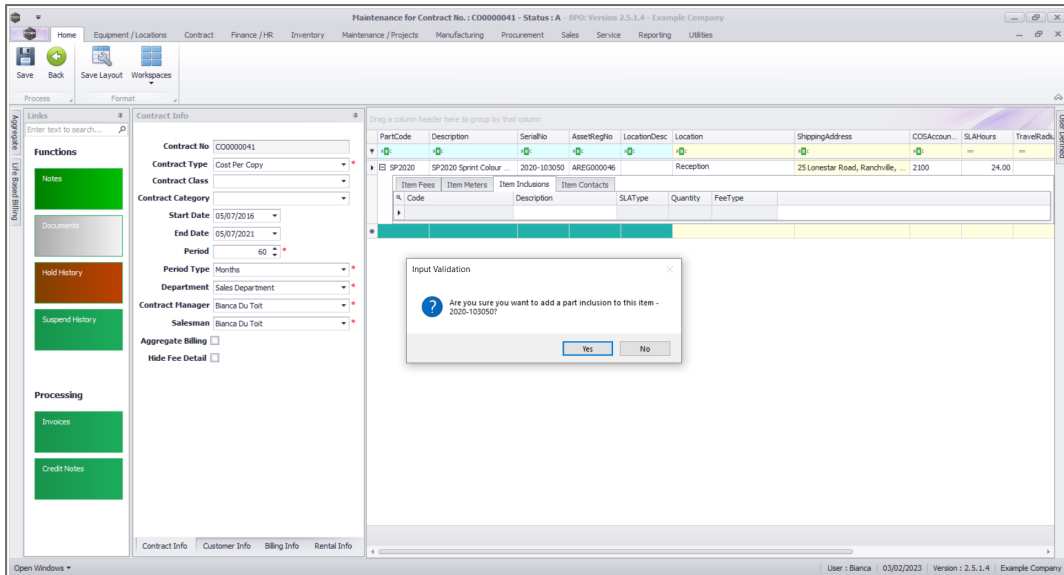


## Add Part Inclusion

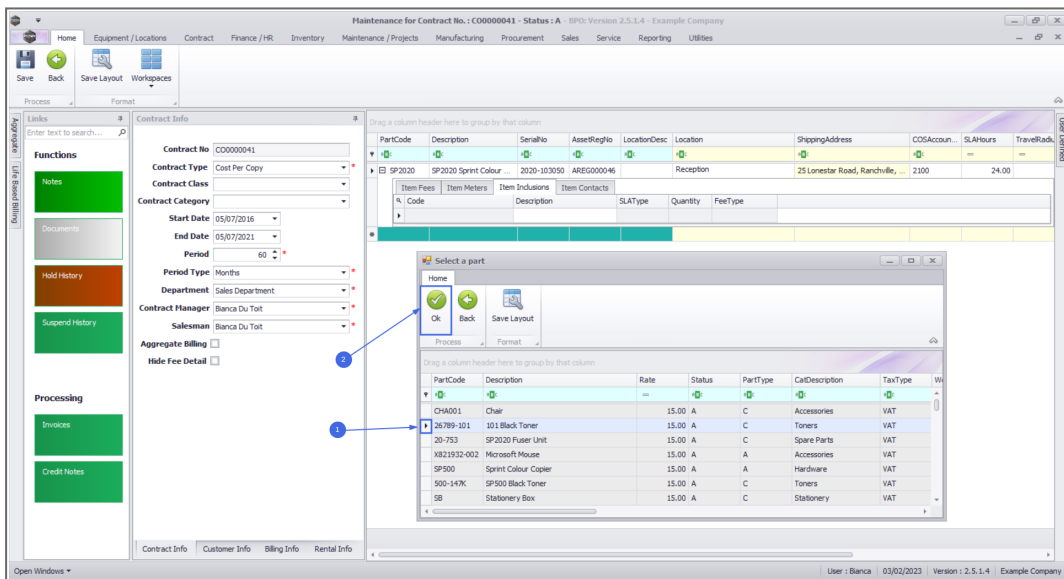
- Click on **Part** - Add Part Inclusion.



- An **Input Validation** message box will pop up asking:
  - Are you sure you want to add a part inclusion to this item - [Serial Number or Location Description]?
- Click on **Yes**.

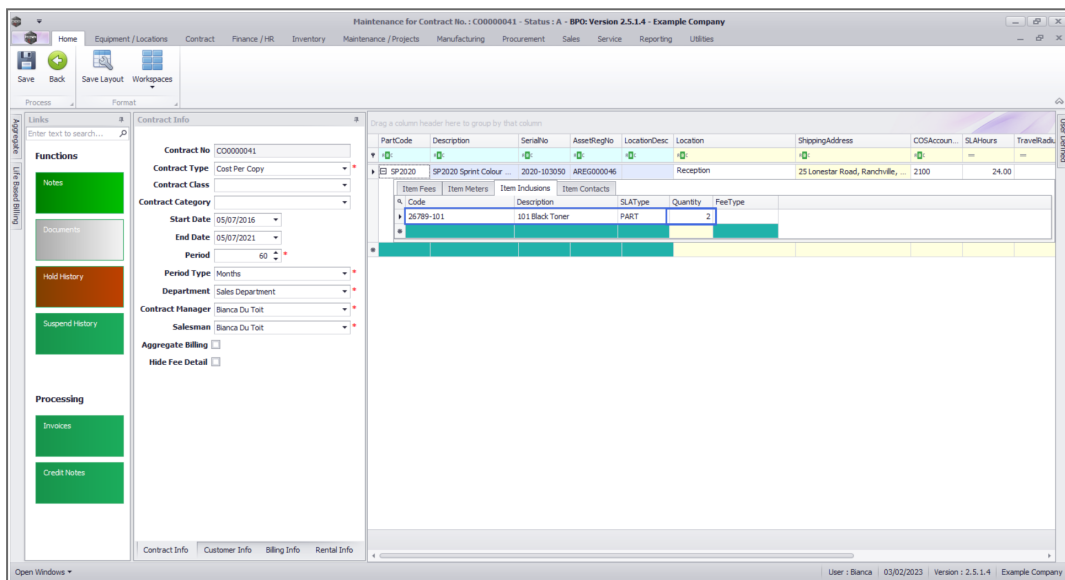


- A **Select a part** screen will pop up.
- Click on the **row selector** in front of the **part** you wish to **add** to this .png as an **inclusion**
- Click on **Ok**.



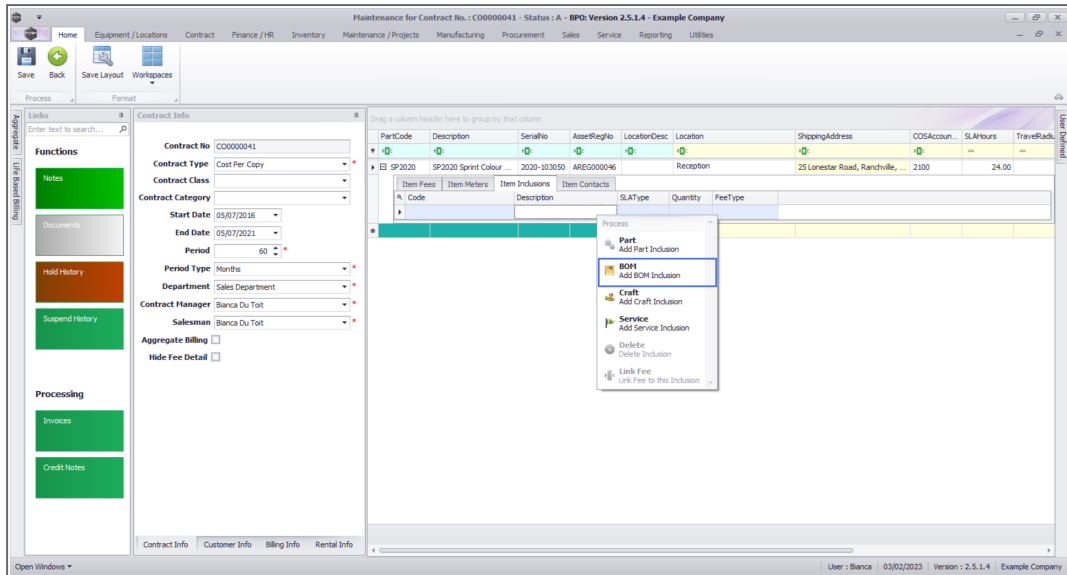
- The selected part will be **added** to the **Item Inclusion** frame.

- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected part.
- **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.

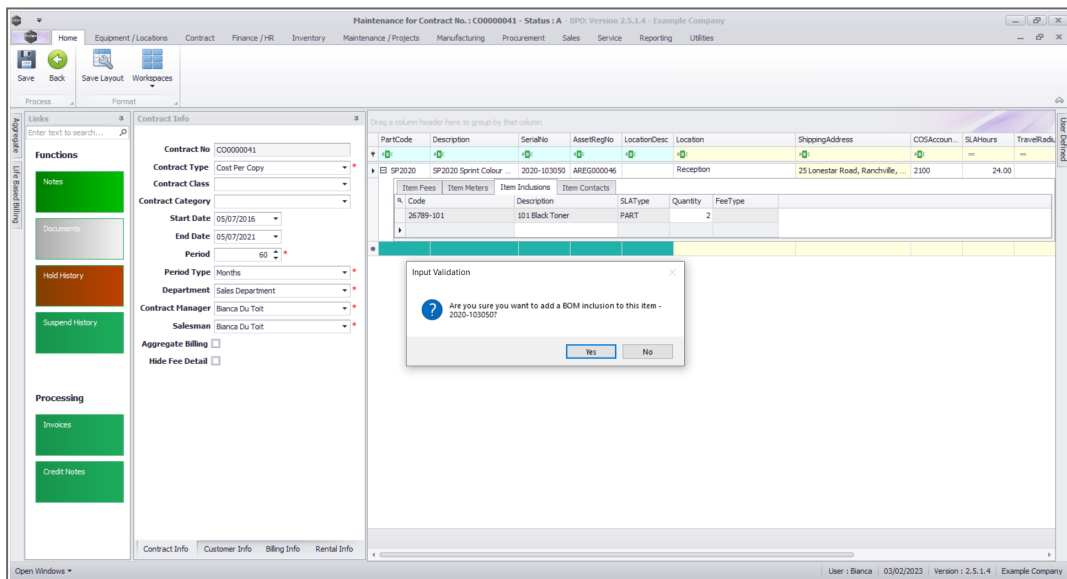


## Add Bill of Materials Inclusion

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **BOM** - Add BOM Inclusion.



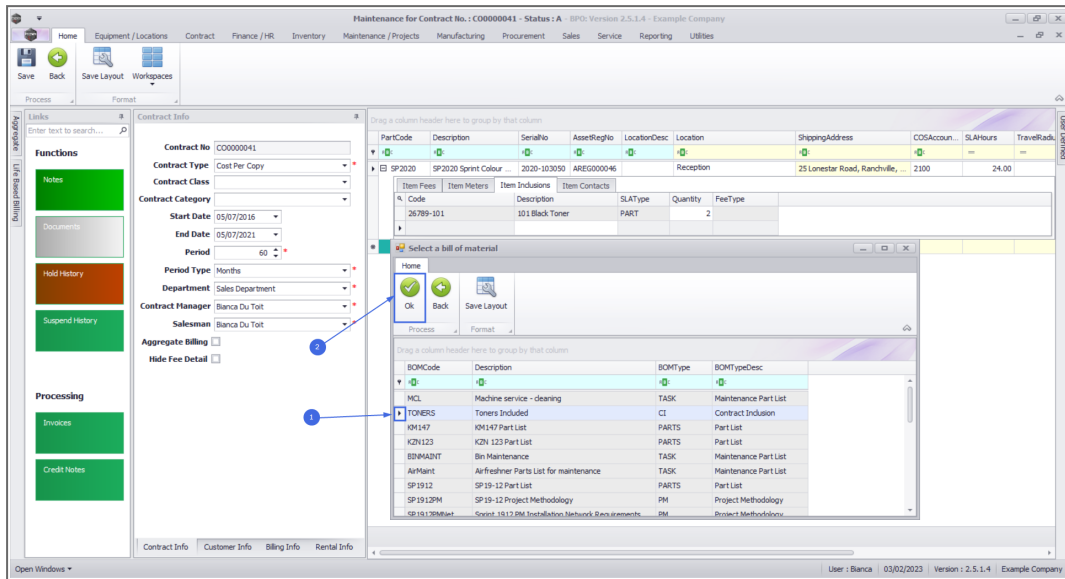
- An **Input Validation** message box will pop up asking:
  - **Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??**
- Click on **Yes**.



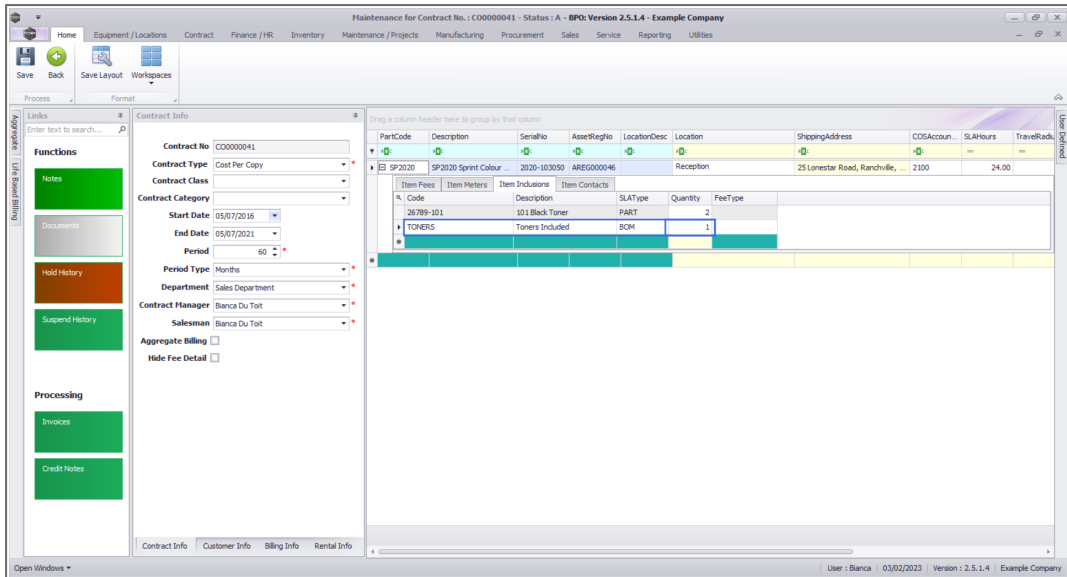
- A **Select a bill of material** screen will pop up.
- Click on the **row selector** in front of the **BOM** you wish to **add** to

this .png as an **inclusion**.

- Click on **Ok**.

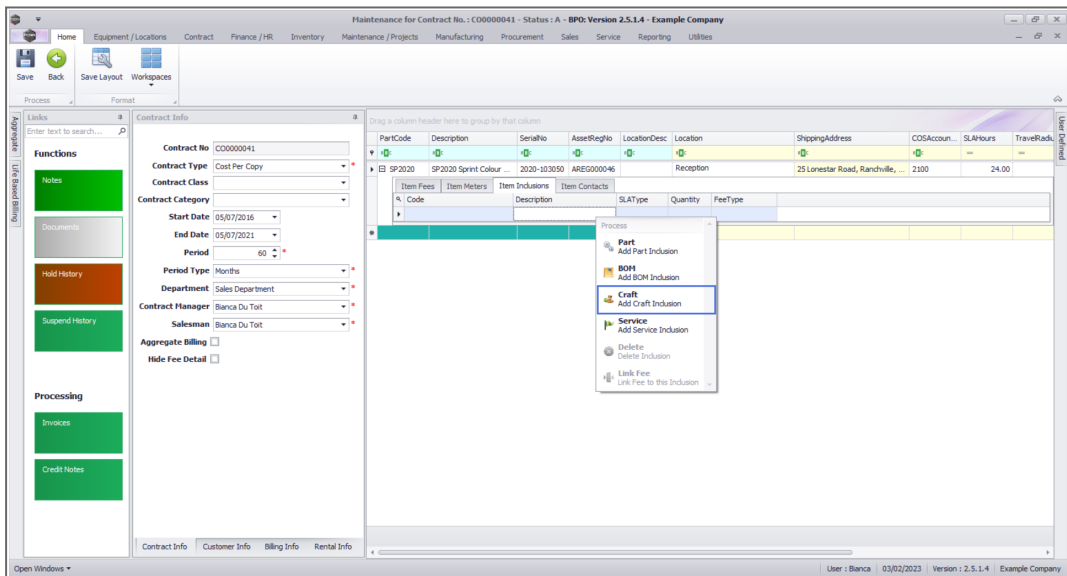


- The selected **BOM** will be added to the **Item Inclusions** frame.
- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected BOM.
- **Fee Type:** This field will only be populated if you **link a fee** to the inclusion.



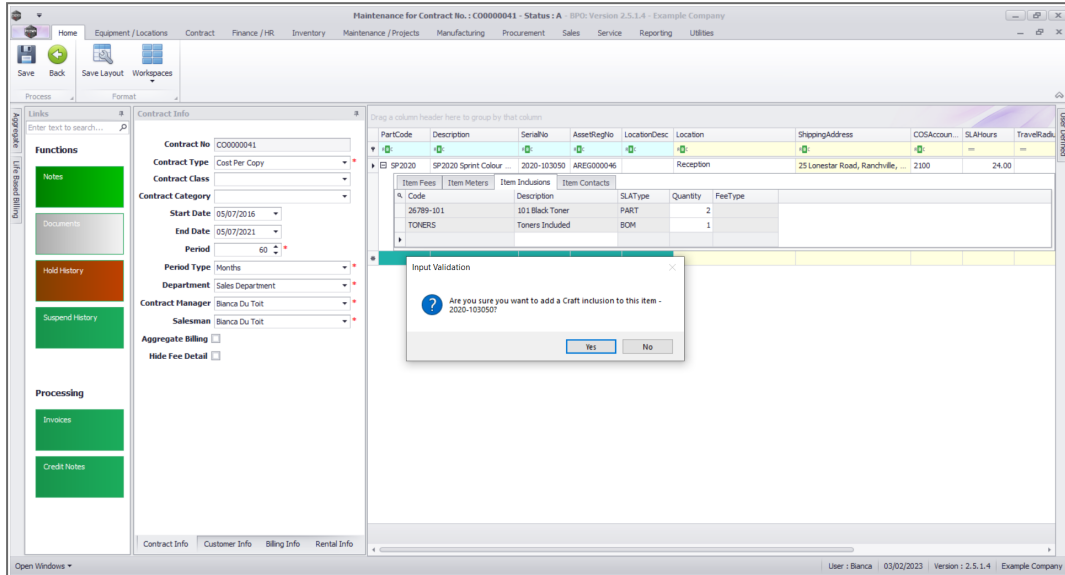
## Add Craft Inclusion

- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** - Add Craft Inclusion.

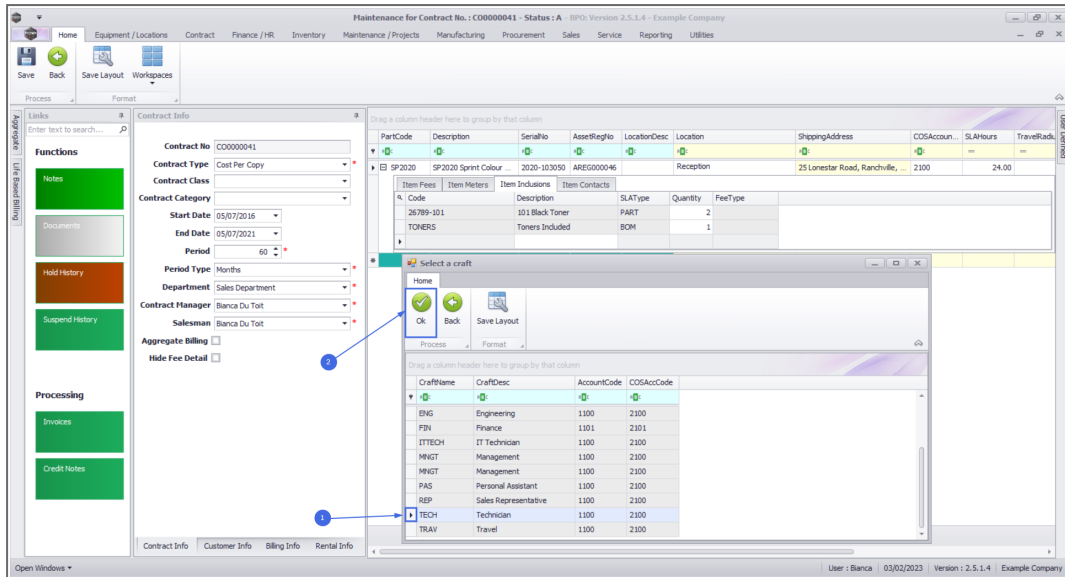




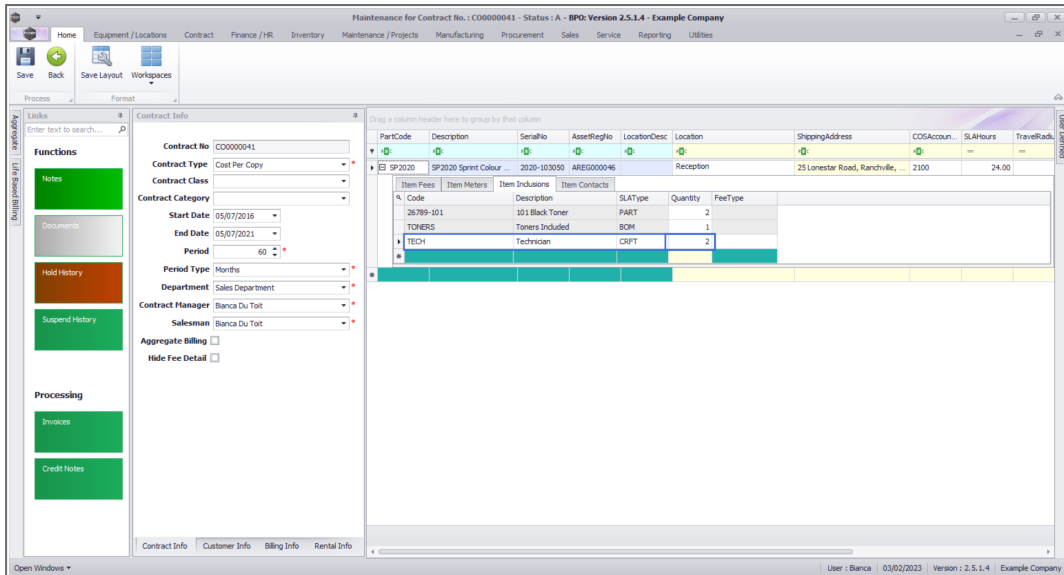
- An **Input Validation** message box will pop up asking:
  - **Are you sure you want to add a Craft inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



- A **Select a craft** screen will pop up.
- Click on the **row selector** in front of the **craft** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.

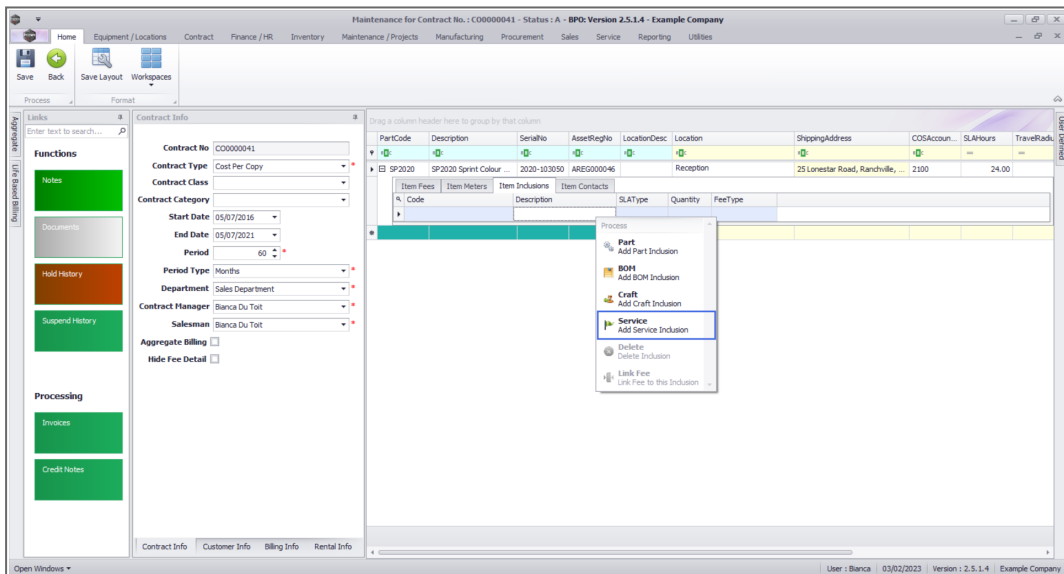


- The selected **Craft** will be added to the **Item Inclusions** frame.
  - **Code:** This field will auto populate with the code of the selected item.
  - **Description:** This field will auto populate with the description of the selected item.
  - **SLA Type:** This field will auto populate with the SLA type of the selected item.
  - **Quantity:** Type in the number of hours included for the selected Craft.
  - **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.

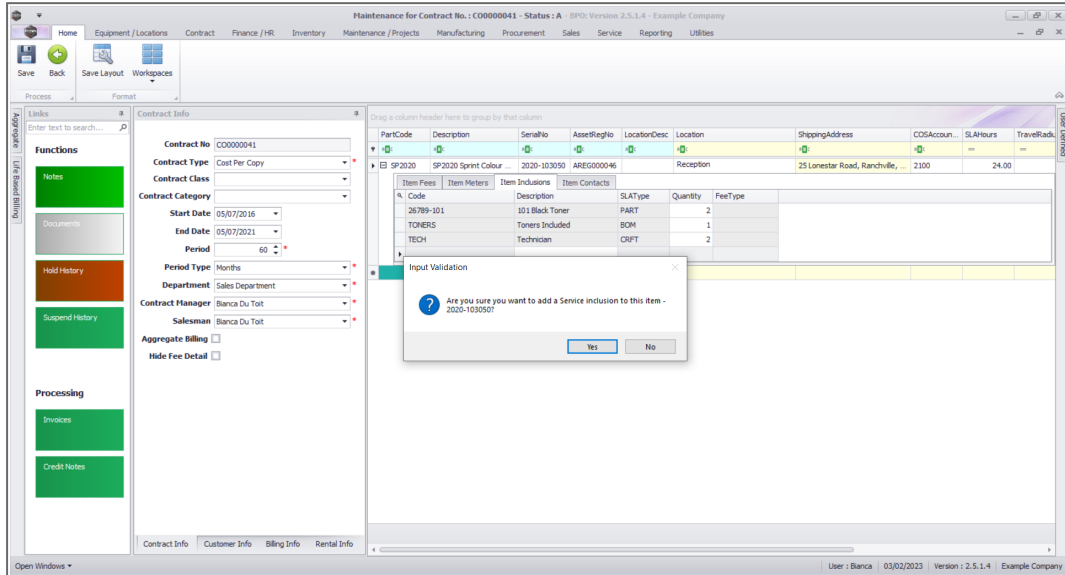


## Add Service Inclusion

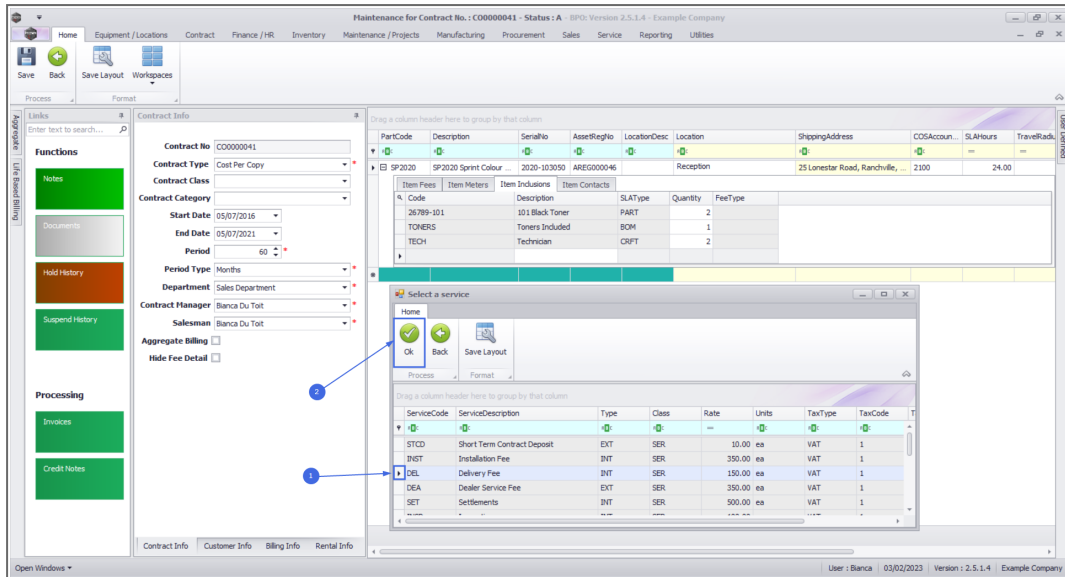
- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **Service - Add Service Inclusion**.



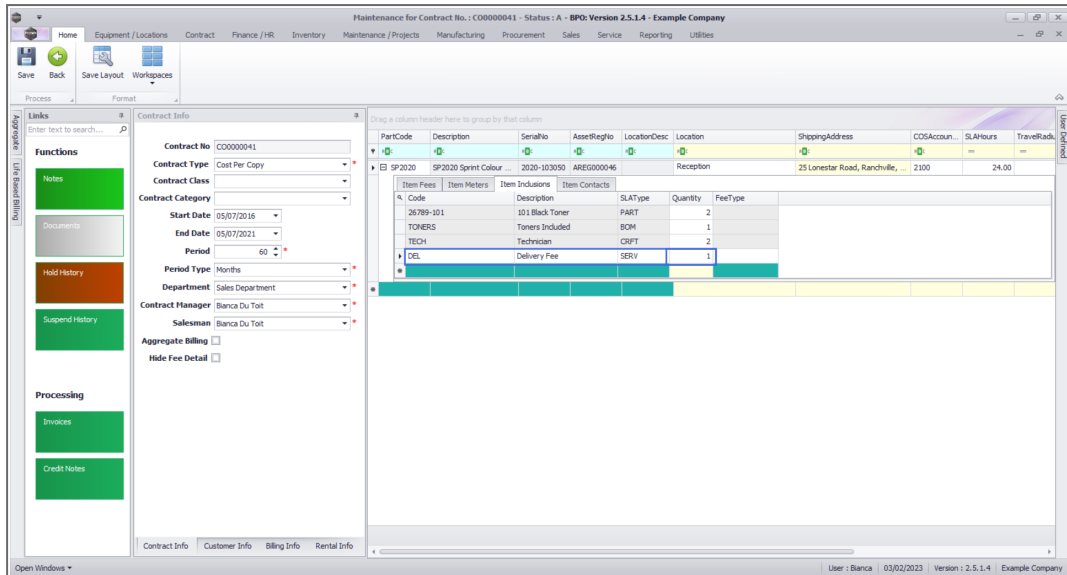
- An **Input Validation** message box will pop up asking:
  - **Are you sure you want to add a Service inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



- A **Select a service** screen will pop up.
- Click on the **row selector** in front of the **service** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.



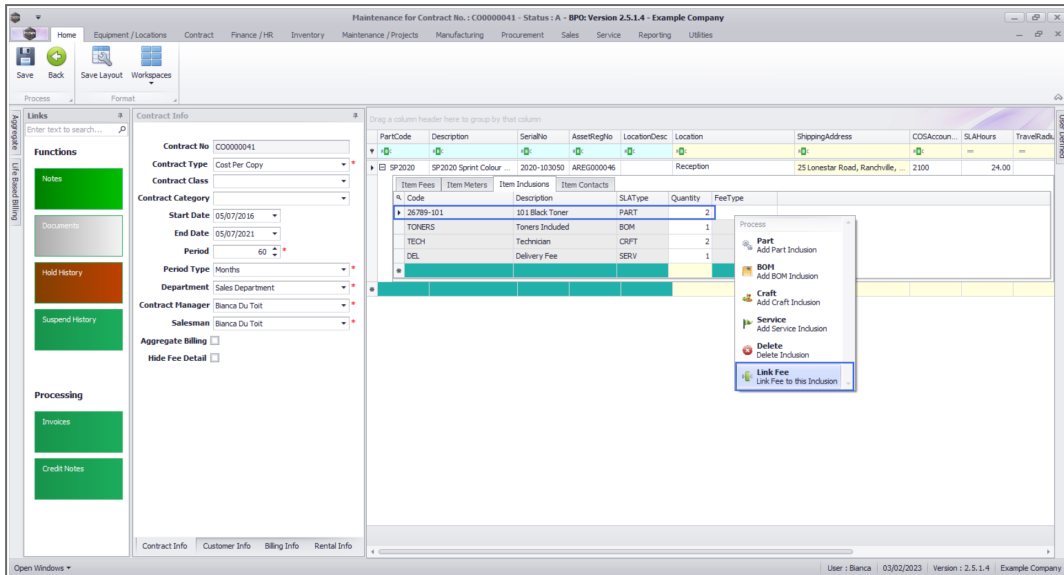
- The selected **Service** will be added to the **Item Inclusions** frame.
  - **Code:** This field will auto populate with the code of the selected item.
  - **Description:** This field will auto populate with the description of the selected item.
  - **SLA Type:** This field will auto populate with the SLA type of the selected item.
  - **Quantity:** Type in the quantity included for the selected Service.
  - **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.



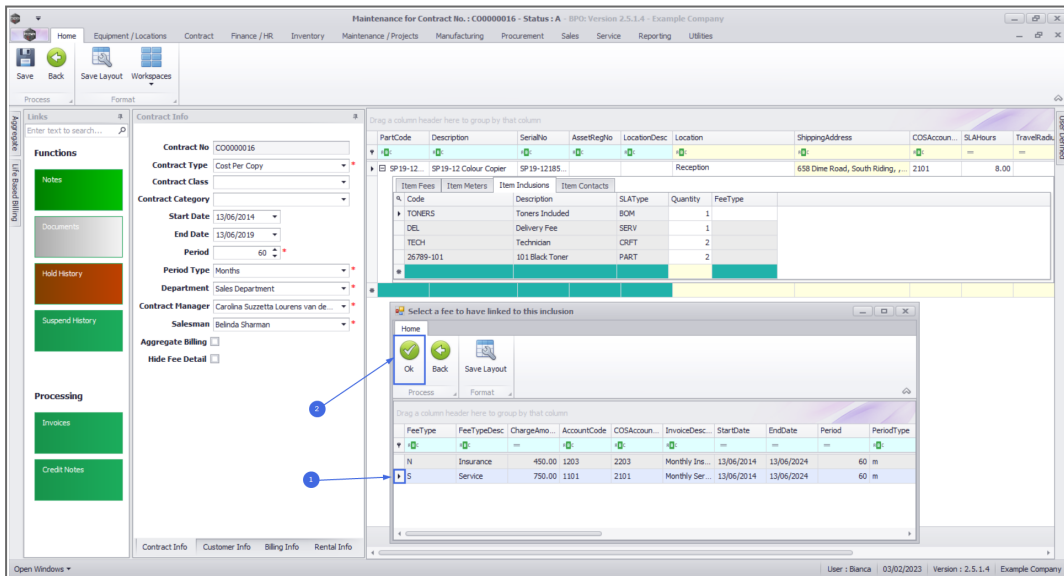
- **Note:** You can add more than one of each type of item inclusion to the .png.

## Link a Fee to an Inclusion

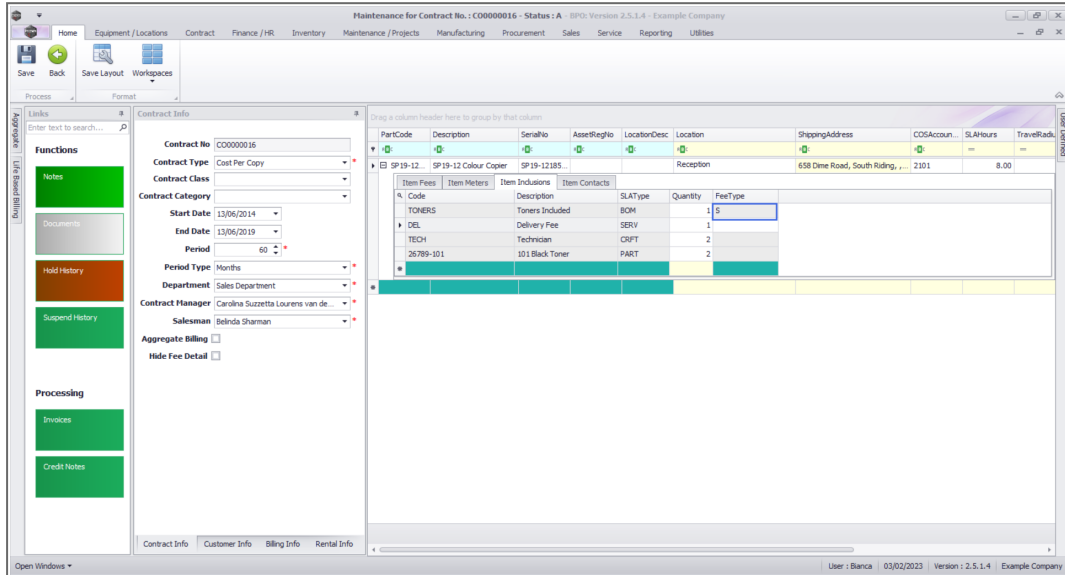
- **Right click** in the **row** of the **item inclusion** that you wish to **link a fee** to.
  - In this image **IT Technician** has been selected.
- The **Process** menu will pop up.
- Click on **Link Fee** - Link Fee to this Inclusion.



- A **The Fee Lookup List** screen will pop up.
- Click on the **row selector** in front of the **fee** you wish to **add** to this inclusion.
- Click on **Ok**.
- **Note:** Only the fees that you selected in the **Item Fees Frame** will be displayed in this screen, and the fee can only be linked to one inclusion.



- The **The Fee Type** field will be populated with the selected fee type.
- In this image, **S** - Service was selected, since the selected inclusion is covered by the Service Fee, in this example.

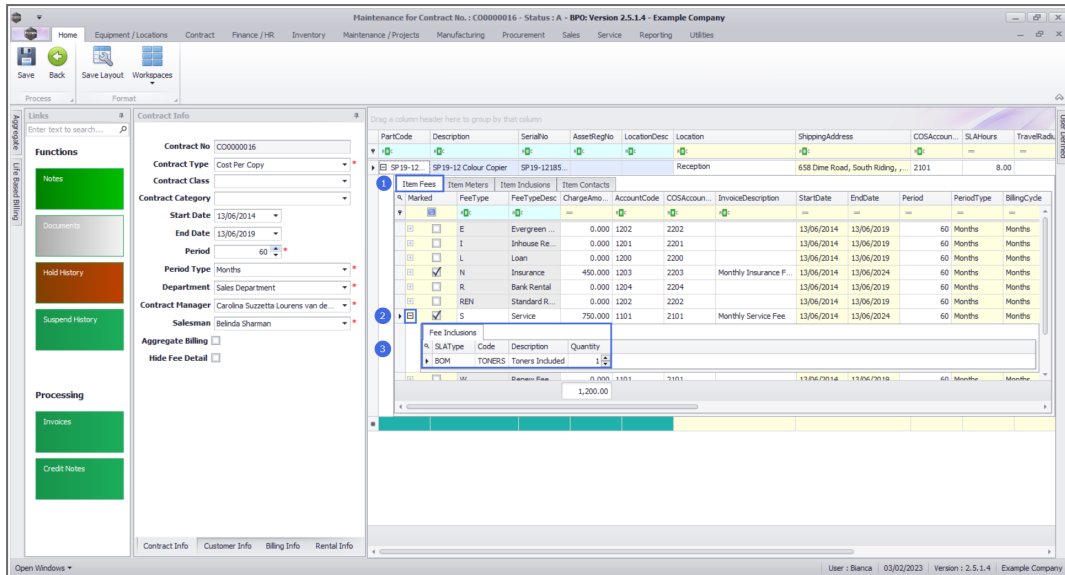


## View the linked Inclusion on the Fee Detail

**Note:** that for this step you will need to save the .png first and then come back to view the Fee's linked Inclusion.

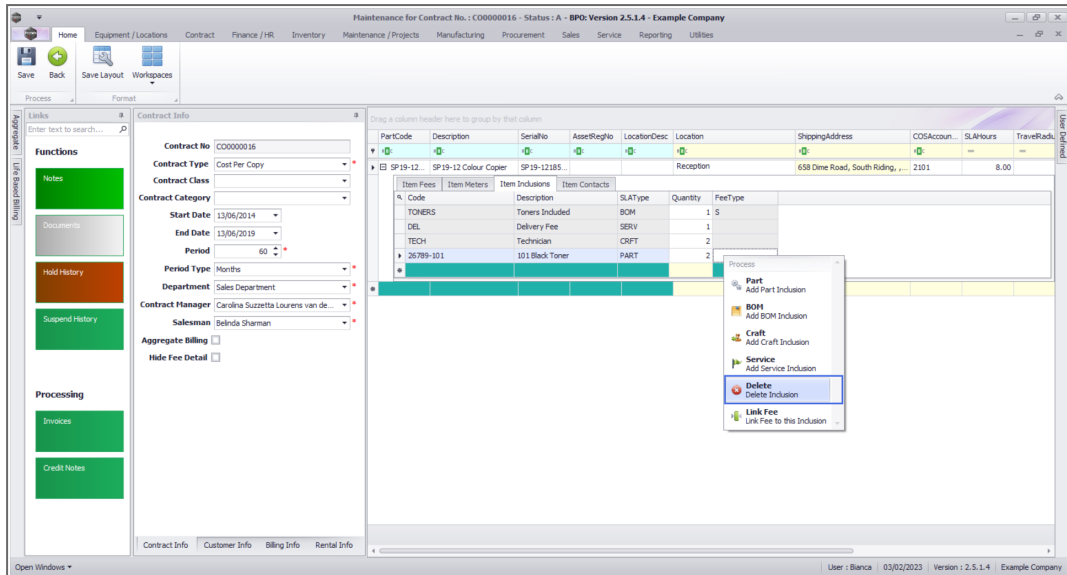
- Click on the **Item Fees** frame.
- Click on the **Expand** button on the fee you linked to an inclusion.
- The **Fee Inclusions** frame will be displayed.
- You can now view the details of the inclusion.
- You can change the **Quantity** of the inclusion in this frame if required.



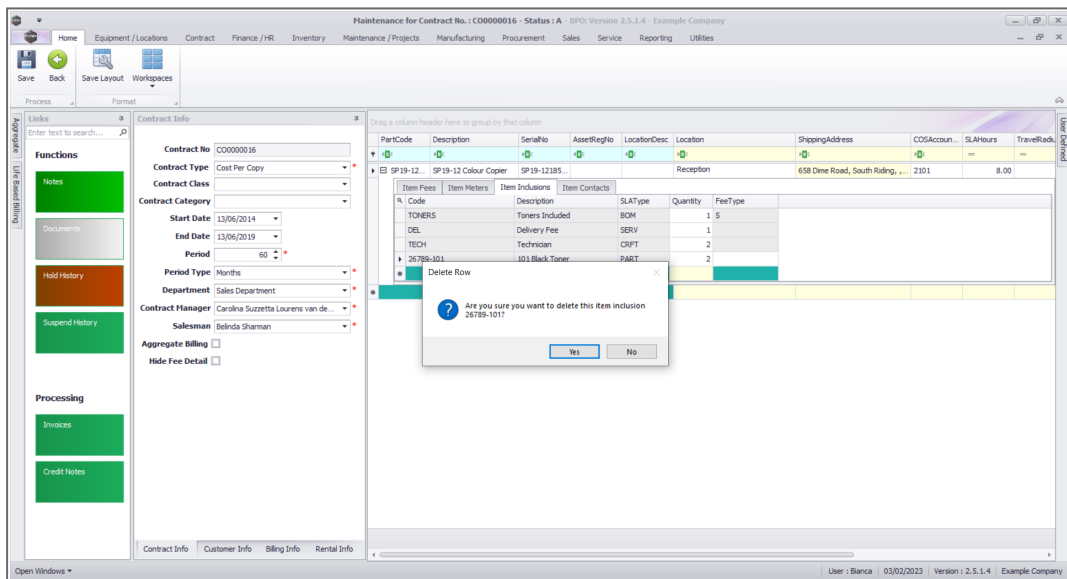


## Delete Inclusion

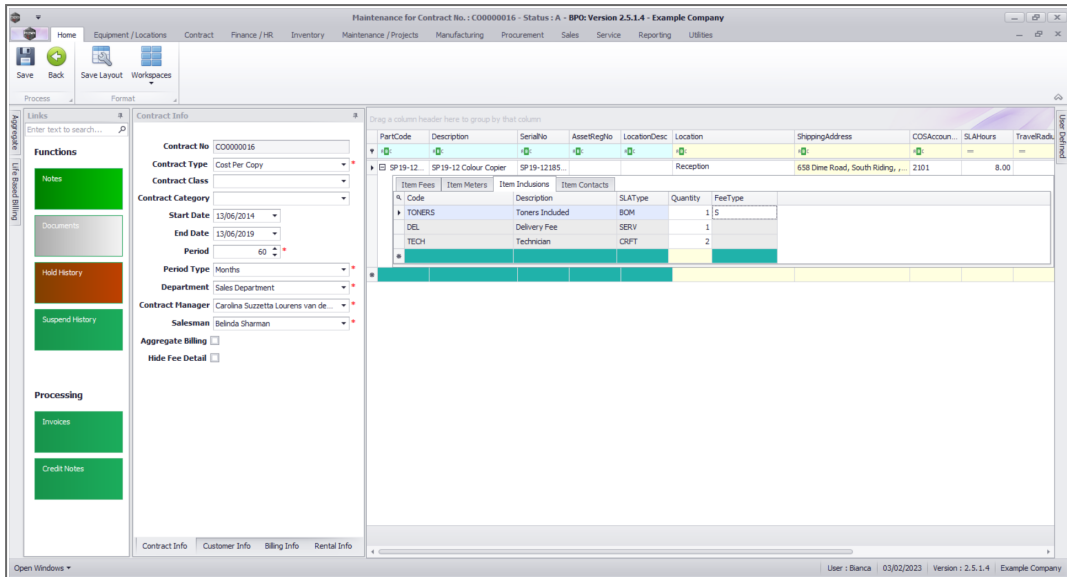
- Another option in the **Item Inclusions Process** menu is **Delete Inclusion**.
- **Right click** in the **row** of the **item inclusion** that you wish to **delete** from the .png.
  - In this image **INST** - Installation Fee has been selected.
- The **Process** menu will pop up.
- Click on **Delete** - Delete Inclusion.



- An **Input Validation** message box will pop up asking:
  - **Are you sure you want to delete this item inclusion - [Serial Number or Location Description]?**
- Click on **Yes**.



- The selected item will now be **removed** from the **Item Inclusions** frame.



Next: Link Contract Item [Contacts](#)

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