

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

CONTRACT

CONTRACTS - ADD (PRE V2.3.0.0)

In BPO2 you can create either a **service** contract or a **rental** contract.

Service Contract: Machine sold to customer outright or via a fin-

ance house.

• A New Deal Sale must be completed in order to create this contract.

Rental Contract: In-house rental (machine owned by company).

• New Deal Rental must be completed in order to create this contract.

Ribbon Access: Contract > Contracts

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

- Select the **Site** that you wish to work in.
 - In this image **Durban** has been selected.



Contracts - Add (pre v2.3.0.0)

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- By default, this screen will list all the **Active** contracts for the selected site.
 - You do not need to change this status to create/add a new contract.
- Contract Listing BPO: Version 2.1.0.43 Example Company ₽× ns Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities and Loo
 Image: Mold
 Image: Release For Approval
 Image: Durban

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- Click on Add.

• The Add a new Contract screen will be displayed.

CUSTOMER INFO PANEL

• Click on the **Customer Info** tab.



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The Customer Info panel will expand.



- Note: Dock this panel to make it easier to work in.
- **Customer:** Click on the search button and select the customer from the **Select a customer for this contract** pop up screen.
- Address: Click on the search button and select the address from the Select an address for this contract pop up screen.
- Order No: Type in the customer order number if required.
- **Required:** Only select this check box if the client <u>must</u> supply an order number before a technician is sent to site.
- Location: Click on the drop-down arrow and select the contract location from the menu.



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CONTRACT INFO PANEL

• When you have finished editing the customer info details, click on the **Contract Info** tab.



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The Contract Info panel will expand.



- **Contract No:** The contract number is generated by the system (where configured in the Contract Type set up).
- **Contract Type:** Click on the drop-down arrow and select the Contract Type e.g., Prepaid Contract.
- **Start Date:** This will auto populate with the current date but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- End Date: This will auto populate 5 years from the start date but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
- **Period:** Either type in or use the arrow indicators to select the period of the contract (life span of the contract).
- **Period Type:** Select the period type (measure relating to the lifespan), e.g., 60 <u>months</u>.
- **Department:** Click on the drop-down arrow and select the department.
- **Contract Manager:** Click on the drop-down arrow and select the contract manager.
- **Salesman:** Click on the drop-down arrow and select the salesman.
- Aggregate Billing: Click on this check box if the customer will receive aggregate billing.
- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts.
 - Note: If this is an evergreen contract, set your end date to 31/12/2999



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BILLING INFO PANEL

• When you have finished editing the contract info details, click on the **Billing Info** tab.

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The **Billing Info panel** will be expanded.



- Note: Some of these details will auto populate but they can be changed as explained below.
- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g., monthly).
- **Billing Period:** This is the financial period in which billing will first begin. Type in or use the arrow indicators to select the period number (e.g., January = 11).
- **Billing Day:** Type in the day that the customer will be billed (e.g., on the 25th of each billing cycle).

NOTE ON BILLING DAY

- The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the Contract Billing screen. The Billing Day is limited to 31. You can type in the day that the customer will be billed (e.g., on the 25th of each billing cycle) else leave as 0.
- **Escalation Type:** Search for and Select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g., 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
 - Note: If this escalates on the anniversary of the contract, then use the same financial period as the billing period
- **Currency:** The system will auto populate with the currency already set up on the customer but you can click on the drop-down arrow and select an alternative currency if required.



- Note: For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g., type in the Dollar amount if the currency is USD.
- **Exchange:** Type in the exchange rate.
- Tax Rate: Type in the tax rate.



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- When you have finished editing the Billing Info panel, you can hide (dock) the panel to make it easier to work in the Items frame.
- Click on the **docking icon** in the billing panel.



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• The **Customer Info**, **Contract Info** and **Billing Info** panels will now be reduced to **tabs** at the side of the screen.



CONTRACT PARTS FRAME

• Right click anywhere in the row of the Parts frame.

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• A **Process** menu will pop up.

ADD MACHINE ITEM

• Click on Machine - Add New Machine Item.

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- The **Select a new item** pop up screen will appear.
- Click on the **row selector** in front of the **machine** that you wish to



link to this contract.

• Click on Ok.

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- The following columns will auto populate according to your item selection:
 - Part Code
 - **Description**
 - Category Description
 - ° Model No
 - ° Serial No
 - Asset Register No



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LINK LOCATION

- Click in the **Location** text box.
- Type in a **location** for this item.

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LINK SHIPPING ADDRESS

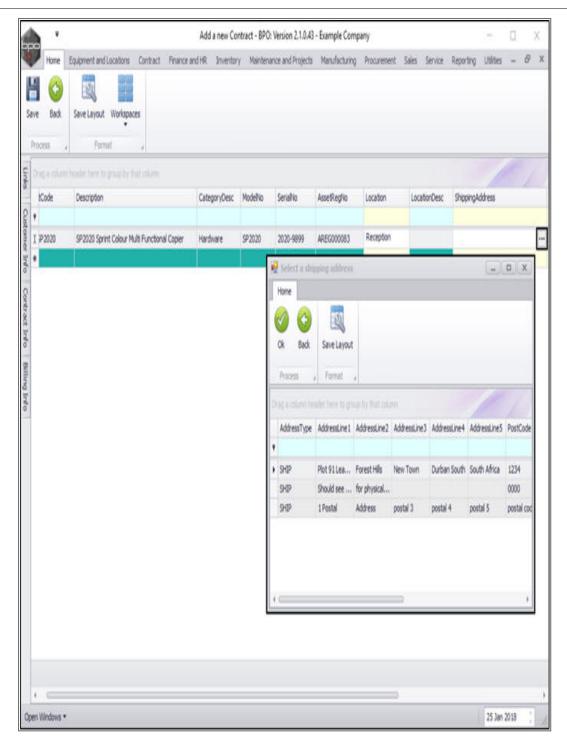
• Click in the Shipping Address text box.



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- An ellipsis button will be revealed.
- Click on this button to display the **Select a shipping address** pop up screen.





- Click on the **row selector** in front of the **shipping address** that you wish to **link** to this **item**.
- Click on Ok.



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• Scroll right to view the remaining columns in the Items frame.



LINK COS ACCOUNT CODE

- Click in the COS Account Code text box.
- Type in the **Cost of Sales account code** to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).



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LINK SLA HOURS

- Click in the SLA Hours text box.
- Type in or use the arrow indicators to select the required call response time (in hours).

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LINK TRAVEL RADIUS

- Click in the Travel Radius text box.
- Type in or use the arrow indicators to select the distance in km's to and from the client, if this travel is to be billed every time a call is logged. If travel is included, then set this to **0**.
 - Note: Travel can always be billed separately, if required.

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LINK TRAVEL CHARGE

- Click in the **Travel Charge Rate** text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g., Rand per kilometre).

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- The Is Extra and Status fields are static.
- Scroll left, so that you can view the Part Code column again.



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ITEMS FRAME

• Click on the **expand** button in the **Part Code** text box.



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- The selected machine's **Item** frame will be expanded.
- Here you can click on 4 different tabs to add or edit:

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- Item Fees: monthly charges
- Item Meters: meter usage charges
- Item Inclusions: items not to bill
- ^o **Item Contacts:** the contact person per machine.

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ITEM FEES FRAME

The Item Fees frame displays Contract Item Fees that have been set up.

Add Item Fee

- Marked: Click on the check box in this column in front of the Fee Type and Fee Description to be charged
 - In this image **N** Insurance has been selected as an example.
- **Charge Amount:** Type in or use the arrow indicators to select the fee amount.
- Account Code: This will auto populate with the account code linked to this fee item.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.
- **Invoice Description:** Type in the description to be used for this fee on the invoice.
- **Start Date and End Date:** These will auto populate according to the contract start date and end date selected in the Contract Info panel. You can click on the drop-down arrow and use the calendar function to select an alternative start and end date if required.
 - Note: Take note that the contract fee will only bill from the <u>start</u> date, and will stop billing at the <u>end</u> date.
- **Period & Period Type:** These fields will auto populate according to the contract start and end date recorded in the Contract Info panel. You can click on the text boxes and either type in or use the drop-down arrows to select an alternative period and period type if required.



- **Billing Cycle:** This will auto populate according to the contract billing cycle recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing cycle if required.
- **Billing Period:** This will auto populate according to the contract billing period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing period if required.
- **Escalation Period:** This will auto populate according to the escalation period recorded in the Billing Info panel. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative escalation period if required.



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Scroll right to view the remaining columns in this frame.

• Escalation Type: This will auto populate according to the escalation type recorded in the Billing Info panel. You can click on the



drop-down arrow in the text box to select an alternative escalation type if required.

• Escalation Amount: This will auto populate according to the escalation amount recorded in the Billing Info panel. You can click on the text box and either type in or use the arrow indicators to select an alternative escalation amount if required.



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• Customer Code:

° Click in the **Customer Code** text box.

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• Customer Code:

- ° An **ellipsis** button will be revealed.
- Click on this button to display the Select a billing customer pop up screen.

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• Customer Code:

- Select the row of the Billing Customer to whom you wish to link this contract.
- ° Click on **Ok**.

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							HOP	15	RE	Hope Works		Durban	031 123 454	7 .			
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- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.
 - Note: If the customer details are left blank, the system will bill the main customer linked to the contract.

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Parts	cilarii heade Code	Description			CategoryDesc	ModelN	o SeriaNo	AssetR	egNo Lo	ation	LocationD	lesc 9	ippingAddre	55	- /	3
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		Wagnese Sciencischerbeiter	e EscalationAmount	Apple Scholars (1)		rNane	SupplerCode	SupplerName	FinanceAmo	nt S	ppressOnInvoice	Commen	OrderNo	Status	AmendDo	90
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		11 Percentage	10.0							.00 N					1900/01/	
Ц	4						-		-							

• Supplier Code / Supplier Name / Finance Amount

 $^\circ~$ Follow the next 5 screen shots <u>only</u> if you wish to link



a supplier for rental back-to-backs (finance house bills company & company bills client).

Pa	rtCode	Description			Category	/Desc	ModelNa	o SerialNo	AssetRe	rgNo Locato	n Location	Vesc 5	hippingAddre	55		c
0	\$P2020	SP2020 Sprint	Colour Multi Functiona	Copier	Hardware	e	SP2020	2020-98	99 AREGOO	00083 Recep	ton	P	ot 91 Leaf R	oad, For	est Hils,.	., 2
	Item Fees	Item Meters	Item Indusions 1	tem Contacts												
	9. slationPer	od EscalationT	pe EscalationAmoun	t Customer	Code Cu	ustomer	Name	SupplerCode	SupplerName	FinanceAmount	SuppressOnInvoice	Commen	t OrderNo	Status	Amend	late
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		11 Percentage	10.0	0						0.00				A	1900/0	
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		11 Percentage	10.0	0						0.00	No			A	1900/0	1/01
	4					_		6			U.					2

• Supplier Code:



- Click on the **Supplier Code** text box to reveal an **ellip**-**sis** button.
- Click on this button to display the Select a finance party pop up screen

2	Home Equip	oment and Locations	Contract Finance a	idHR inv	entory	Mainteni	nce an	d Projects	Manufac	turing Pi	ocurer	nent Sales Ser	vice R	porting	Utilities	- 0	
ve		e Layout Workspaces															
0/1) k citalyn heid	e here to gride by that															
P	artCode	Description		Catego	ryDesc	ModelNo	Se	riaNo	AssetRe	gNo I	ocato	n LocationC	esc 5	ippingAddri	55		(
۲																	
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	Item Fees	Item Meters Item	Indusions Item Con	tacts													
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	SPR001	Sprint Distributors Local	Harry Jackson	GEN	A	PS	4										
,	SPR002	Sprint International	George Matthews	GEN	A	PS	4										
	TON001	Tonys Copy Shop	Tony	SIPA	A	PS	9										
	YE5001	Young Electric	Grant	GEN	A	PS	3										
	TEST001	Test Suppler	Tam	GEN	1	PS											
	PR10001	Printer World (Pty) Ltd	Maggie Seegers	3PTY	1	PS	4	_									
	400.000	Apple Distributors	Sammy Jones	GEN	A	PT	3										
-	APD001	Papers share seener a															

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- Supplier Code:
 - Select the **row** of the **Supplier** that you wish to **link** to this **item**.
 - Click on Ok.



9	Home Equi	pment and Locations	Contract Finance	and HR in	ventory	Mainten	iance a	nd Proje	cts Manufa	cturing	Procurer	ient Sa	les i Ser	vice Re	porting	Utilities	- 6	1
e Toces		ve Layout Workspaces Format																
	rtCode	Description		Catego	ryDesc	ModelNo	5	eriaNo	AssetR	egNo	Locato	n	LocationD	esc Sh	opingAddri	155	- /	1
4																		
8	SP2020	SP2020 Sprint Colour	Multi Functional Copies	Hardwa	re	\$P2020	2	020-989	9 AREGO	00083	Recept	on		Pla	t91LeafR	cad, For	est Hils,	•
	Item Fees	and the second s	indicate presidence which is a france of	Stelle Landson and														
		iod EscalationType Es	icalationAmount Cus	tomerCode	Customer	lame	Supple	erCode	SupplerName	Finan	ceAnount	Suppress	OnInvoice	Comment	OrderNo	Status	Amendo	late
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	SupplerCode	SupplerName	ContactName	SupplerTyp	e Status	Class	VAT	N										
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	SPR001	Sprint Distributors Loca	Harry Jadison	GEN	A	PS	4											
,	SPR002	Sprint International	George Matthews	GEN	A	PS	4											
	TON001	Tonys Copy Shop	Tony	SHPA	A	PS	9											
	YE5001	Young Electric	Grant	GEN	A	PS	3											
	TEST001	Test Suppler	Tam	GEN	1	PS												
	PR10001	Printer World (Pty) Ltd	Maggie Seegers	3PTY	1	PS	4											
	APD001	Apple Distributors	Sammy Jones	GEN	A	PT	3.											
							1					_						

• **Supplier Name:** This will auto populate once the supplier code has been selected.



Parts	Code	Description			CategoryDesc	Mod	seitio se	riaNo	AssetRe	gNo	Location	i l	ocationD	esc 9h	ppingAddre	15		
0.0	P2020	(03030 Caused (olour Multi Function	Conias	Hardware	592	020 20	20-9899	AREGOD	0083	Recept	00		Dia	t91LeafR	and East	ut Life	
	Item Fees		Item Indusions		Textwork .	20	uev ev	01-2022	ANDONO	0003	never			PIV	c at rodi v	080,100	os rivojas	
		Second statistics of the	EscalationAmount	and the second states of	and an approximately service of the	Varie	SupplerCode	Supplier	ane	Financi	eAmount	Suppress0	ninvoice	Comment	OrderNo	Status	AmendD	8
	•				Stores and the store													
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	1	1 Percentage	10.00								0.00	No				A	1900/01	K
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	I I	1 Percentage	10.00	HOP001	Hope Wor	İs	SPR002	Sprint Int	ernational		0.00	No				A	1900/01	K
	1	1 Percentage	10.00					1		ĺ	0.00	No				A	1900/01	K
	(<u>(</u>			11							

• **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



Part	Code	Description		•	Cate	egoryDesc	ModelNo	s Se	riaNo	AssetRe	gNo	Locato	1	LocationD	esc Sh	opingAddre	55		
					1271					10.000		Darrest							
ES	president and	1	olour Multi Functions			óware	\$P2020	20	20-9899	AREGOD	0083	Recept	on		Plo	t91LeafR	sad, For	est Hills,	ł.
	Item Fees 9. stonPeriod	Spatial and the space	Item Inclusions	A CONTRACTOR OF A CONTRACTOR O	÷	CustomerNa	me Sup	olerCode	SupplerNa	ne	Finan	eAmount	Suppress	OnInvoice	Comment	OrderNo	Status	AmendD	at
	•											172557/54				an a			
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	1	1 Percentage	10.00									0.00	No				A	1900/01	Ņ
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	1	1 Percentage	10.00									0.00	No				A	1900/01	10
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	1	1 Percentage	10.00									0.00	No				A	1900/01	Ņ
	<u>(</u>								9										

• **Suppress on Invoice:** Select this if you wish to hide the fee on the invoice.



- **Comment:** Click in this text box and type in a comment regarding this contract fee, if required.
- Order No: Type in a customer order number relevant to this item, if required.
- **Status:** This field will change from **I** (Inactive) to **A** (Active) when you have saved the assigned item fee.
- Amend Date: This field is static.

The 'Add an Item Fee' process is now complete.



		100000 B200000			Add a new Con							0.000.000	to ser	000111140	ona Ac	NAME OF T		9
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Parto	lode	Description			CategoryOesc	ModelNo	Ser	aNo	AssetRe	gNo	Locator	1	LocationD	esc 9	ippingAddre	95		
89	2020	SP2020 Sprint C	olour Multi Functiona	I Copier	Hardware	\$2020	20.	10-9899	AREGOO	0083	Recept	on		P	191LeafR	oad, For	est Hils,	
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1	4 stonPeriod	EscalationType	EscalationAmount	CustomerC	ode CustomerN	lame Supp	kerCode	SupplerNa	me	Finance	Inount	SuppressC	ninvoice	Commen	t OrderNo	Status	Amend	Date
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Link Additional Item Fees

- Scroll back to the Marked column.
- You can now set up **additional fees** for this machine by following the above process, if required, before moving on to the next frame.



-										Version 2.1.0.43 -							0	X
Ho	omé	Equ	ipment an	d Locations Cont	tact Finance	and HP	t. Inve	ntory	Maintenar	nce and Projects	Manufacturing	Procurem	ent 5	ales Servi	ce Rep	orting Utilitie	5 14	i P
1 (Ģ		21	4														
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Part	Cod	e	Descrip	ton			Category	Oesc	ModelNo	SerialNo	AssetRegNo	Location		LocatorDe	sc Ship	pingAddress		0
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8	P20	20	SP2020	Sprint Colour Multi	Functional Copier	6	Hardware		SP2020	2020-9899	AREG000083	Recepti	m		Plot	91LeafRoad,	Forest H	ls, 2
	1	em Feer	Item I	Meters Item Indu	usions Them Co	ntacts	1											
	٩	Marked	FeeType	FeeTypeDesc	ChargeAnount	Acco	untCode	COSA	ccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BlingCyd	le BilingPeriod	Escalat	onPeriod
	۲	M																
			8	Evergreen Rental	0.00	1202					01 Jan 2018	31 Dec 2022	60	Months	Months	11		1
			k .	Loan	0.00	1200						31 Dec 2022		Months	Months	11		1
		0	R	Bank Rental		1204						31 Dec 2022		Months	Months	11		1
			S	Service		1101						31 Dec 2022		Months	Months	11		11
		N	1. 1.	Inhouse Rental Insurance		1201		2101		Insurance Fee	01 Jan 2018 01 Jan 2018	31 Dec 2022		Months	Months Months	11		11
	Ŧ	N	RÉN	Standard Rentals	350.00	1203		2101		Insurance ree		31 Dec 2022		Months Months	Months	11		11
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	4				350.00													
-	1						_						_	-				-

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ITEM METERS FRAME

• When you have finished working in the Item Fees frame, click on the **Item Meters** tab.

Part			Descrip	grain by the celu			Category	0eer	ModelNo	SeriaNo	AssetRegNo	Location		LocationDe	e Gim	ngAddress		(
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85	5P20	20	5P2020	Sprint Colour Multi I	unctional Copier		Hardware		SP2020	2020-9899	AREGODOOBJ	Recepti	n		Plot 9	1 Leaf Road, I	Forest Hills,	
	R	em Fees	Iten N	Aeters Item Inclu	ions Item Co	ntacts												
	the second		FeeType	FeeTypeDesc	ChargeAmount	Acco	untCode	COSA	ccountCode	InvoiceDescription	StartDate	EndDate	Period	PeriodType	BilingCycle	BilingPeriod	EscalationP	erio
	۲	M																
			E	Evergreen Rental		1202						31 Dec 2022		Months	Months	11		0
		-		Loan	0.00							31 Dec 2022		Months	Months	11		
	-	-	R S	Bank Rental Service	0.00	1204						31 Dec 2022 31 Dec 2022	- 51	Months	Months	11		
		H	э. 1	Inhouse Rental	0.00							31 Dec 2022		Months	Months	11		18
			N	Insurance	350.00			2101		Insurance Fee		31 Dec 2022		Months	Months	11		
	I		REN	Standard Rentals	0.00							31 Dec 2022		Months	Months	11		
	-	-	W	Renew Fee	0.00							31 Dec 2022		Months	Months	11		1
					350.00													
					220.00													
H	-												-	-				-



• The Item Meters frame displays all linked meters, minimum billing and meter usage charges.

Read this Important Note on Min Billing and Meter Charge Setup

- If you are not going to bill meters then this is fine. If you are complete the contract set up (you can link the meters afterwards) then follow these 2 steps:
 - 1. Assign the meter to the machine
 - 2. Add the meter charges to the contract



PartCode Description CategoryOesc ModelNo SeriaNo AssetRegNo SP2020 SP2020 Sprint Colour Multi Functional Copier Hardware SP2020 2020-9899 AREGO00083 Item Frees Item Meters Item Inclusions Item Contacts A Marked MeterCode StarSkeading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es A Marked MeterCode StarSkeading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es Colour 0.00 01 Jan 1900 0.00 0 Colour 0.00 0 C	11	EscalationType Percentage Percentage	ic ShippingAdd Plot 91 Leaf EscalationAmoun
Item Fees Item Inclusions Item Contacts Item Contacts Marked MeterCode StartReading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es Monio 0.00 01 Jan 1900 0.00 0 Item Inclusions Item Inclusions Glow 0.00 01 Jan 1900 0.00 0 Item Inclusions Item Inclusions	Reception icalationPeriod	EscalationType Percentage	Plot 91 Leaf
Item Fees Item Meters Item Inclusions Item Contacts 9. Marked MeterCode StartReading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es 9. Monio 0.00 01 Jan 1900 0.00 0 Item Colour	icalationPeriod	Percentage	
R. Marked MeterCode StartReading ReadingDate MinBilling MinQuantity AccountCode COSAccountCode Es Image: Colour 0.00 01 Jan 1900 0.00 0 Image: Colour <	11	Percentage	EscalationAmoun
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Colour 0.00 01 Jan 1900 0.00 0			
		reitenage	10.0
		[EditValue is null]	



- **Marked:** Click on the check box in front of the name of the first Meter to be billed on this contract.
 - In this image the **Mono** meter has been selected as an example.
- **Start Reading:** Type in the start reading of the meter.
- **Reading Date:** Click in this text box to display the calendar function, use this to select the reading date.
- **Min Billing:** Type in the minimum billing amount (in Rand value).
- **Min Quantity:** Type in the minimum quantity (the copies that are included in the minimum billing amount).
- Account Code: Type in the sales account code for these meter charges to post to.
- **COS Account Code:** Type in the cost of sale account code where this fee should be posted to.



	ack Save	ع Layout Work	kspaces	inance and HR 1	nventory (Kantenance and	d Projects Mar	nufacturing Procur	ement Sales Se	ervice Reporting	Utites – đ	9 X
hocess Drag a co		Format / here to group	 A) By that colored 									
PartC	ode	Description			CategoryD	esc ModelNo	SeriaNo	AssetRegNo	Location	LocationDesc	: ShippingAdd	ress
892	2020	SP2020 Swint	Colour Multi Fund	rtional Conjer	Hardware	592020	2020-989	9 AREG000083	Reception		Plot 91 Leaf	Road
- G	Item Fees	Item Meters	Item Inclusion	and a street	1000		2020 707	-			100.010001	-week
		MeterCode	StartReading	ReadingDate	MnBilling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmoun	t Su
1	_	Mono	0.00	01 Jan 2018	350.00	1000	2101	1100		Percentage	10.0	0
	8	Colour		01 Jan 1900	0.00	0	2101	1100		Percentage	10.0	
	H									[EditValue is null]		



• Escalation Period, Escalation Type and Escalation Amount: These will pull through from the main contract details but you can click in the text boxes and amend the details if required.

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			hapaces								1
PartC	.ode	Description			CategoryD	lesc ModelNo	SerialNo	AssetRegNo	Location	LocationDesc	: ShippingAddres
89	2020	SP2020 Sprint	Colour Multi Func	tional Copier	Hardware	5P2020	2020-9899	AREGO00083	Reception		Plot 91 Leaf Ros
1 G	Item Fees	Item Meters	Item Inclusion	800.000 (C. 4.	10000000		2546.000	A (40554) 444			
0	9 Marked	MeterCode	StartReading	ReadingDate	Mn8iling	MinQuantity	AccountCode	COSAccountCode	EscalationPeriod	EscalationType	EscalationAmount
	•								-		
		Mono Colour		01 Jan 2018 01 Jan 1900	350.00		2101	1100		Percentage Percentage	10.00
	• •	colour	0.00	01 380 1900	0.00	0			**	(EditValue is null)	10.00



- **Scroll right** until you can view the remaining columns in this frame.
 - Supplier Code, Supplier Name and Finance Amount: Follow the next 5 screenshots <u>only</u> if you wish to link a supplier here - if a party other than the main customer will be paying for the meter charges (e.g., this company's head office).



Parto	Code	Description				•	CategoryD	Desc ModelNo	SeriaNo	AssetRegNo	Loca	stion Li	cationDesc	Shippi	ngAddres
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- Supplier Code:
 - Click on the **Supplier Code** text box to reveal an **ellipsis** button.
 - Click on this button to display the Select a finance party pop up screen.



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- Supplier Code:
 - Click on the row selector in front of the Supplier that you wish to link to this item meter.
 - Click on **Ok**.

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• **Supplier Name:** This will auto populate once the supplier code has been selected.

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• Finance Amount: Click in this text box and either type in or use the arrow indicators to select the finance amount.

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- **Order No:** Type in a customer order number relevant to this item, if required.
- Is Active: This field is set to Yes (Active) once you have clicked on the Marked checkbox.
- Amend Date: This field is static.



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Add Meter Levels

Read this Important Note on Min Billing and Meter Charge Setup

- Scroll left to return to the Marked column.
- **Right click** in the **row** of the **item** you wish to **add** a **meter level** to.
 - In this image the **Mono** meter has been selected.
- A **Process** menu will pop up.
- Click on **Add** Add a level.



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• The Meter Charges frame will be expanded.



- Note: For this mono meter, there is already a minimum billing set up of a R250 charge for the first 1000 copies. BPO calculates the usage charges by first calculating the minimum billing set up. This means the first line in the Meter Charges matrix looks incorrect as the From Quantity is static at 0 but it is actually reading from the minimum billing set up. In this example it will read the meter from 1001.
- From Quantity: This is the number from which this charge will be effective.
 - As the first (minimum billing level) is up to and including 1000, this level will start counting from 1001.
- **Finance Amount:** This will only be populated if backto-back finance is used, and the finance house is financing part of the meter charge.
- Unit Charge: Type in the unit charge for the meter (charge per copy when Minimum Quantity is exceeded).



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Add Additional Charge Level

- Right click anywhere in the row of the item that you wish to add anothermeter level to. (You can keep the meter charges matrix open).
- The **Process** menu will pop up again.
- Click on **Add** Add a level.



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- A **second level** has now been added to the Meter Charges matrix.
 - From Quantity: Type in or use the arrow indicators to select the number of copies from which this charge will be effective.
 - **Finance Amount:** This will only be populated if backto-back finance is used, and the finance house is financing part of the meter charge.
 - Unit Charge: Type in the unit charge for the meter (charge per copy).
 - Repeat this process to add more meter charges as required.

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• When you have finished working in the Meter Charges frame, **close** the frame.



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ITEM INCLUSIONS FRAME

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

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- The **Item Inclusions** frame will be expanded.
 - The Item Inclusions frame lists all **Contract Inclusions** (items which are included in the contract and not billed separately).



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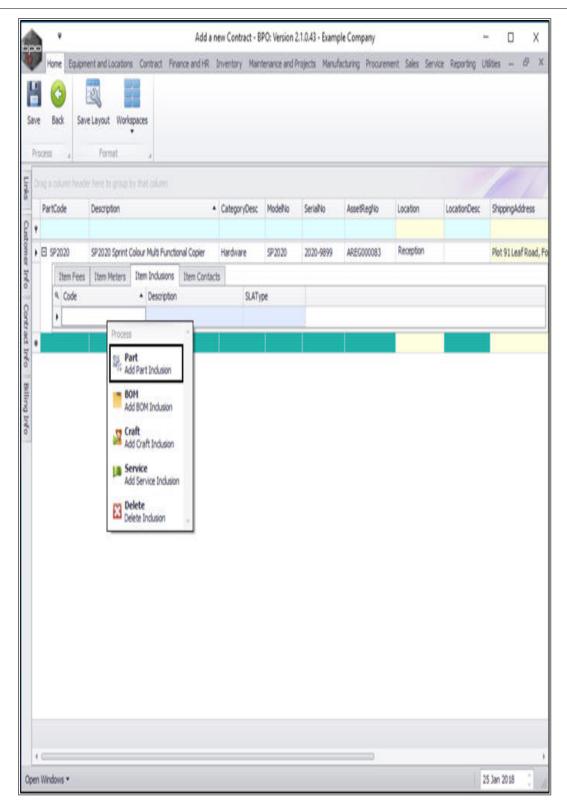
Add Item Inclusions

- **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 BOM Inclusion
 - Craft: Add Craft Inclusion
 - Service: Add Service Inclusion
 - Delete: Delete Inclusion

Add Part Inclusion

• Click on **Part** - Add Part Inclusion (individual part issued to a call that will not be billed).







- An Input Validation message box will pop up asking;
 - Are you sure you want to add a part inclusion to this
 - item []?
- Click on Yes.



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



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



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Add BOM Inclusion

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **BOM** Add BOM Inclusion (contract inclusion parts issued to a call that will <u>not</u> be billed).

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- An Input Validation message box will pop up asking;
 - Are you sure you want to add a BOM inclusion to
 - this item []?
- Click on Yes.



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- 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 contract as an **inclusion**.
- Click on **Ok**.



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• The selected BOM will be added to the Item Inclusions frame.



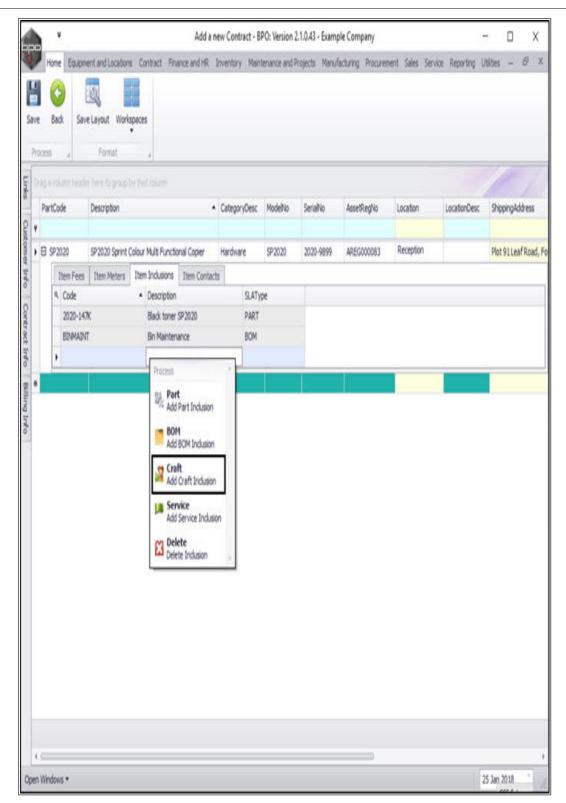
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Add Craft Inclusion

- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** Add Craft Inclusion (time logged on a call that will not be billed).







- An Input Validation message box will pop up asking;
 - Are you sure you want to add a Craft inclusion to
 - this item []?
- Click on Yes.



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



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• The selected Craft will be added to the Item Inclusions frame.



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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 (services logged on a call that will not be billed).

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- An Input Validation message box will pop up asking;
 - Are you sure you want to add a Service inclusion to
 - this item []?
- Click on Yes.



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



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• The selected Service will be added to the Item Inclusions frame.



• Note: You can add <u>more than one</u> of each type of item inclusion to the contract.



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Delete Inclusion

- The final 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 contract.
 - In this image **CON** Consulting has been selected.
- The **Process** menu will pop up.
- Click on **Delete** Delete Inclusion.



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- An Input Validation message box will pop up asking;
 - Are you sure you want to delete this item inclusion -

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• Click on Yes.

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



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ITEM CONTACTS

• When you have finished working in the Items Inclusions frame, click on the **Item Contacts** tab.



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• The Item Contacts frame will be **expanded**.



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Add a Contact

- **Right click** anywhere in the first **row** of the **Item Contacts** frame.
- A Process menu will pop up.
- Click on **Contact** Add a contact.

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- A Process Validation message box will pop up asking;
 - Are you sure you want to add a contact to this item

-[]?

• Click on Yes.

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- A Select a contact pop up screen will appear.
- Click on the **row selector** in front of the **contact** you wish to **add**.
- Click on Ok.

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- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address already set up on the selected contact.
- **Contact Phone Number:** This will auto populate with the phone number already set up on the selected contact.
- **Contact Mobile:** This will auto populate with the mobile number already set up on the selected contact.

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- Click in the **Contact Type** text box to reveal a drop-down arrow.
- Click on this arrow to display a **Contact Type** drop-down **menu**.
- Click on the **contact type** you wish to assign to this Item.
 - In this image **User Contact** has been selected.

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- Click in the **Contact Method** text box to reveal a drop-down arrow.
- Click on this arrow to display a Contact Method drop-down menu.
- Click on the **preferred contact method** you wish to use.
 - In this image **Email** has been selected.



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• Is Meter Contact: Click on this check box to see the contact in the relevant month end billing run meter capture screens and reports.

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- You can add further contacts to this frame by **right clicking** anywhere in a **row** of the **Item Contacts** frame and following the same process as above.
 - In this image a **second contact** has been added.

Help v2024.5.0.7/1.0 - Pg 142 - Printed: 04/07/2024



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Delete a Contact

- You can also **delete** a contact if required.
- **Right click** in the **row** of the **contact** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** Delete the contact.

Help v2024.5.0.7/1.0 - Pg 144 - Printed: 04/07/2024



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- A **Delete Row** message box will pop up asking;
 - Are you sure you want to delete this item contact

[]?

• Click on Yes.

Help v2024.5.0.7/1.0 - Pg 146 - Printed: 04/07/2024



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• The contact has now been **deleted** from the Items Contacts frame.



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• When you have finished working in the machine Item Frames, click on the **hide** button in the part code text box.

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ADD NEW LOCATION ITEM

- **Right click** in anywhere in a **row** of the **Parts** frame.
- A **Process** menu will pop up.
- Select Location Add New Location Item.

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4					Add a r	new Contract - B	PO: Version	2.1.0.43 - Exam	ple Company					Х
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- A Select an item location pop up screen will appear.
- Click on the **row selector** in front of the **item location** you wish to **add**.
- Click on Ok.



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- The selected item location will now populate the Location Description text box.
- Follow the same processes as above to **add information** to this location row as required.
 - Note: In the Items Frame, there will be no option to add Item Meters as this is a <u>Location</u> Contract not a Machine Contract.



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• You can continue to add contract machine items or contract location items as required, however additional items can also be added later.

SAVE THE CONTRACT

• When you are finished, click on **Save**.

Help v2024.5.0.7/1.0 - Pg 158 - Printed: 04/07/2024

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- The new contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**.
- Click on the drop-down arrow in the status field and select the **New** status.



Contracts - Add (pre v2.3.0.0)

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• The new contract can be found within the **New** contract status listing screen.

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RELEASE AND APPROVE A CONTRACT

• From here the contract will need to be **Released** and then **Approved** before it becomes active.



Contracts - Add (pre v2.3.0.0)

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