

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

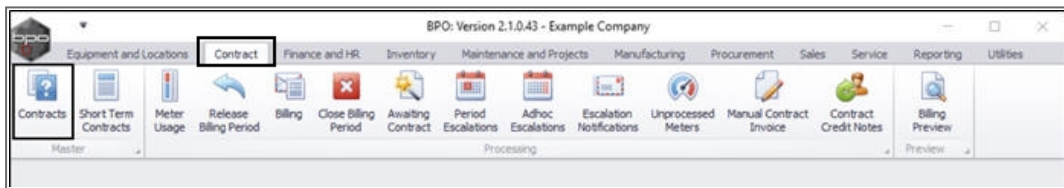
CONTRACTS

CONTRACTS – HOLD

A contract is placed on **Hold** due to customer/client reasons. An example of this can be: **non-payment**.

When a contract is placed on hold, the system will prevent call logging, but the customer will still be included in the month end billing.

Ribbon Access: Contract > Contracts



- The **Contract Listing** screen will display.
- Select the **Site** that contains the contract you wish to place on Hold.
 - In this example, **Durban** has been selected.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractStatus	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Koof	test	23 Mar 2016
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000044	BOT001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Koof		16 May 2017

- Upon opening, this screen will default to the **Active** status.

Note: A contract can only be put on Hold whilst in this status.

- If the screen is open in a **different** status, click on the drop-down **arrow** in this field and select **Active** from the menu.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

Add | Edit | Delete | View | Save Layout | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports
 Workspaces | Suspend | Remove From Approval | Active | Find Contract
 Save Filter | Release | Approve Contract | Refresh

Processing | Format | Status Processing | Current | Print | Re...

Links
Enter text to search...

Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Riding Centre		16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016
CO000044	BOT0001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016

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SELECT CONTRACT

- Select the **row** of the contract you wish to place on hold.
- Click on **Hold**.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

Hold Release For Approval Suspend Remove From Approval Release Approve Contract Close Contract

Durban Active Refresh Find Serial No. Find Contract Print Export Reports

Processing Format Status Processing Current Print Re...

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
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CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group		CPC	Cost Per Copy	Main		13 Jun 2014
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Main		28 Jul 2014
CO000020	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop		CPC	Cost Per Copy	Main		29 Jun 2015
CO000031	YES001	Young Electric	Sales Department	CPC	Cost Per Copy	Hillcrest		24 Mar 2016
CO000041	PAN001	Panda Copiers		CPC	Cost Per Copy	Main		05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
CO000043	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area		01 Aug 2016
CO000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Contract	Kloof	test	23 Mar 2016
CO000044	BOT0001	Bothas Networking Inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016

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The **Contract on Hold: []** screen will open.

ADD HOLD DETAILS

- **Date:** This will auto populate with the current date.
 - Either type in or click on the drop-down arrow and use the calendar function to select an alternative date.
 - Either type in or use the arrow indicators to select an alternative time.
- **Reason:** Type in the reason for putting this contract on hold.
- **Est. Release Date:** This will auto populate 48 hours after the hold date.
 - Either type in or click on the drop-down arrow and use the calendar function to select an alternative release date, if required.
 - Either type in or use the arrow indicators to select an alternative release time, if required.
- **Employee:** Select the name of the employee who has requested to place this contract on hold.

Contract on Hold : CO0000045 - BPO: Version 2.1.0.43 - Example Company

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

Save Back

Process

Date 30 Jan 2018 9:21:12 AM

Reason

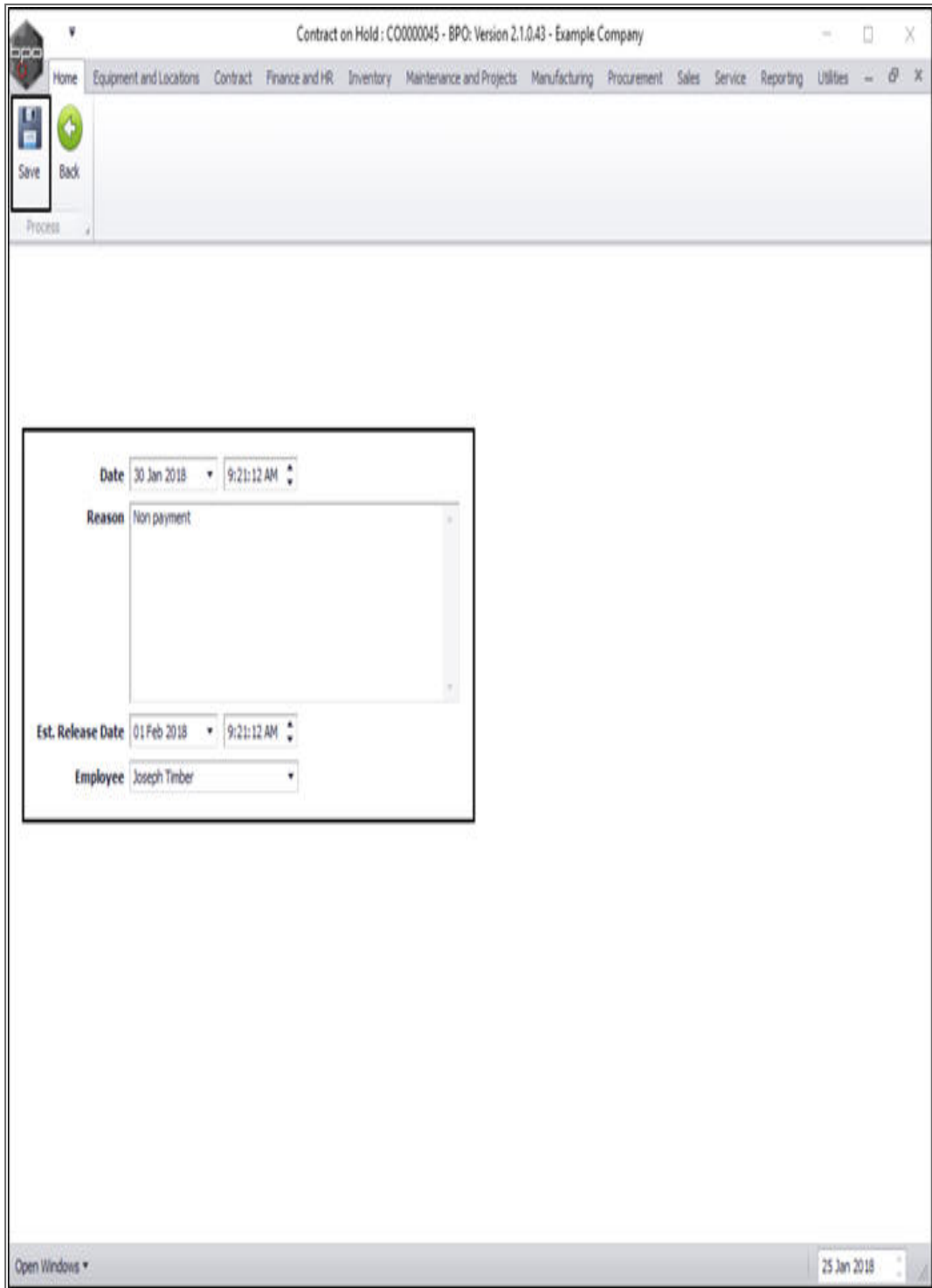
Est. Release Date 01 Feb 2018 9:21:12 AM

Employee Sarah Milder

Open Windows 25 Jan 2018

SAVE HOLD DETAILS

- When you have finished adding details in this screen, click on **Save**.



The screenshot shows a web application window titled "Contract on Hold : CO0000045 - BPO: Version 2.1.0.43 - Example Company". The interface includes a top navigation bar with menu items: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar is a toolbar with "Save" and "Back" buttons, and a "Process" dropdown menu. The main content area features a form with the following fields:

- Date:** 30 Jan 2018 (dropdown), 9:21:12 AM (time dropdown)
- Reason:** Non payment (text input)
- Est. Release Date:** 01 Feb 2018 (dropdown), 9:21:12 AM (time dropdown)
- Employee:** Joseph Timber (dropdown)

At the bottom of the window, there is an "Open Windows" dropdown menu on the left and a system clock showing "25 Jan 2018" on the right.

- You will return to the **Contract Listing** screen.
- A **Customer Processing** message box will pop up advising the following:
 - Contract No: [] has been placed on hold.
- Click on **Ok**.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

Add | Edit | Delete | View | Save Layout | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports
 Workspaces | Suspend | Remove From Approval | Active | Find Contract
 Save Filter | Release | Approve Contract | Close Contract | Refresh

Processing | Format | Status Processing | Current | Print | Re...

Links
Enter text to search...

Functions

- Notes
- Documents
- Hold History
- Suspend History

Processing

- Invoices
- Credit Notes

Open Windows | 25 Jan 2018

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate
CO000006	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Hillcrest	1234	22 Apr 2014
CO000007	OFF001	Office Supplies Unlimited		CPC	Cost Per Copy	Forest Hills Centre		07 Jan 2014
CO000011	WES001	Westwood Dynamic		CPC	Cost Per Copy	Main	ContractOrderNo	09 May 2014
CO000013	TIA001	Titan Group		CPC	Cost Per Copy	South Ridng Centre		16 May 2014
CO000014	TIA001	Titan Group		CPC	Cost Per Copy	Main		16 May 2014
CO000016	TIA001	Titan Group						13 Jun 2014
CO000019	OFF001	Office Supplies Unlimited						28 Jul 2014
CO000020	HOP001	Hope Works						01 Jan 2011
CO000028	HAC001	Hack PC - IT Shop						29 Jun 2015
PC000001	DAN002	Dancing Shoes					test	23 Mar 2016
CO000031	YES001	Young Electric						24 Mar 2016
CO000041	PAN001	Panda Copiers						05 Jul 2016
CO000042	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Main		07 Sep 2016
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CO000044	BOT001	Bothas Networking inc		PRE	Prepaid Contract	Durban Area		25 Oct 2016
CO000047	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Kloof		16 May 2017

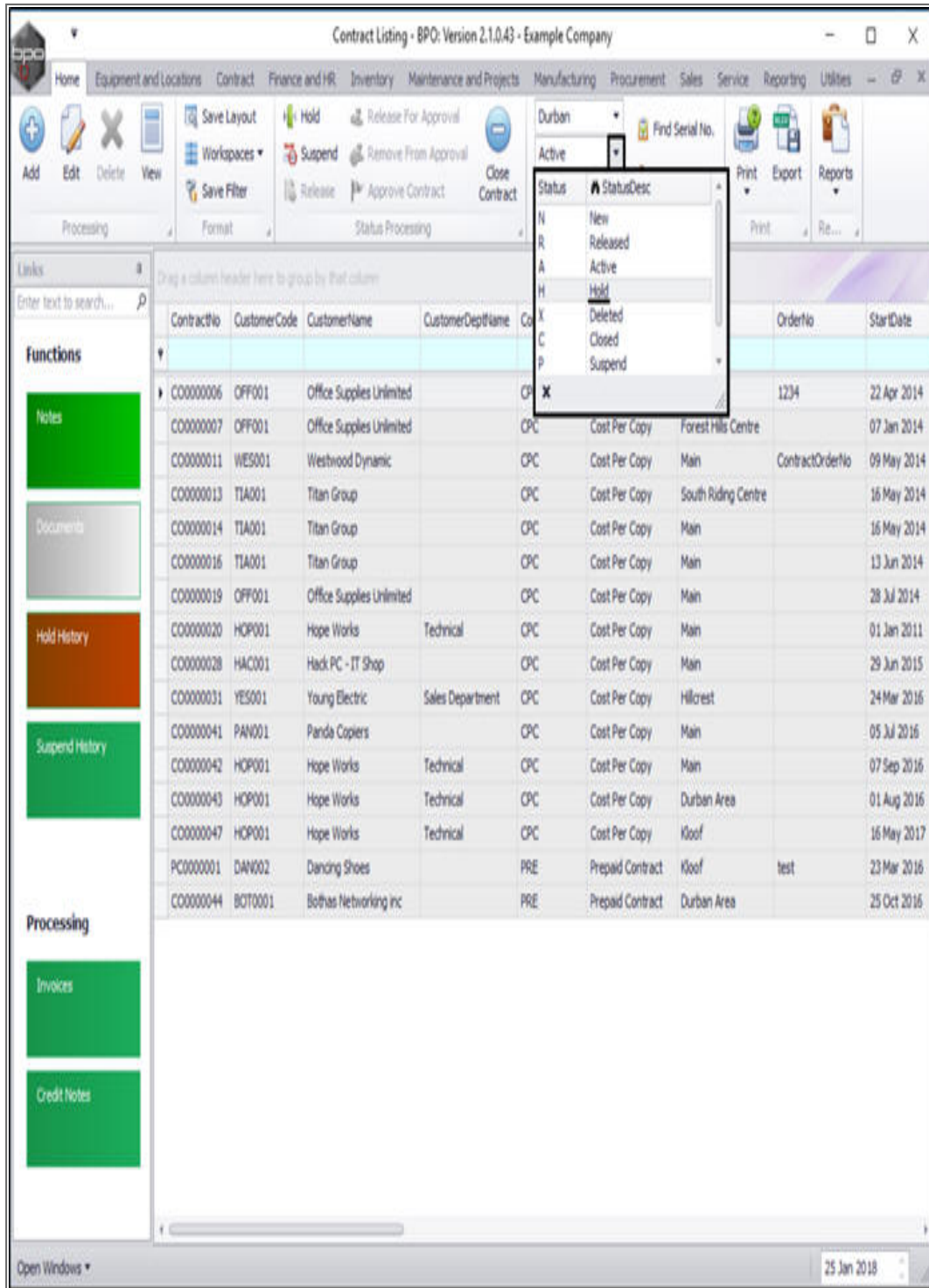
Customer Processing

Contract No : CO000045 has been placed on hold.

OK

VIEW CONTRACT IN HOLD STATE

- This contract has now been **moved** from the **Active** status to the **Hold** status.
- Select the **Hold** status.



- You can now view the contract in the Contract Listing screen where the status is set to **Hold**.

Contract Listing - BPO: Version 2.1.0.43 - Example Company

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

Add | Edit | Delete | View | Save Layout | Hold | Release For Approval | Durban | Find Serial No. | Print | Export | Reports
 Workspaces | Suspend | Remove From Approval | Hold | Find Contract | Refresh | Print | Re...
 Save Filter | Release | Approve Contract | Close Contract

Processing | Format | Status Processing | Current | Print | Re...

Links
 Enter text to search...
 Drag a column header here to group by that column

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	Depart
CO0000045	HOP001	Hope Works	Technical	CPC	Cost Per Copy	Durban Area	1234	10 May 2017	10 May 2022	Sales

Functions
 Notes
 Documents
 Hold History
 Suspend History

Processing
 Invoices
 Credit Notes

Open Windows | 25 Jan 2018

MNU.112.015

