

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

CONTRACT

LINK ADDITIONAL ITEMS

You can link additional contract items and accessories to a contract using the process set out below.

Items can only be linked when a Contract is in the **New** or **Active** status.

Ribbon Select Contract > Contracts



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

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.



| | View 🔏 Save Filte | | ease 🏴 Approve Contract 🚳 Declin | e Closure Close Contract | Active | | Find Contract | • | Export Report | 8 | | | | | | |
|------------------------|-------------------------------|-------------------------|----------------------------------|--|--------------|-------------|-------------------------|--------------|---------------|------------|--------------------------|--------|------------|-------------|--------------|---|
| Processing | Format Drag a column head | er here to group | Status Processing | | 4 | Current | | a Print | a Repo | | | | | | | |
| ş | ContractNo | CustomerC | CustomerName | CustomerD | ContractType | ContractTy | Location | OrderNo | StartDate | EndDate | Department | Period | PeriodType | BillingCyde | BilingPeriod | |
| Functions | * HDC | (D) | -D: | Image: Control of the second se | 1 0 : | (D) | III | 1 0 0 | - | - | •••• | - | (D) | (D) | - | |
| | CC0000009 | DER001 | Derton / Technologies | | CPC | Cost Per Co | Durban Area | | 07/05/2014 | 07/05/2019 | Sales Depar | | 60 Months | Months | | 3 |
| Notes | CO000016 | TIA001 | Titan Group | | CPC | Cost Per Co | Main | | 13/06/2014 | 13/06/2019 | Sales Depar | | 60 Months | Months | | 4 |
| | CC0000018 | SAM001 | Samanthas Diner | | CPC | Cost Per Co | Main | | 09/07/2014 | 09/07/2019 | Sales Depar | | 60 Months | Months | | 5 |
| | CO0000019 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co | Main | | 28/07/2014 | 28/07/2019 | Sales Depar | | 60 Months | Bi-annual | | 6 |
| | PC0000001 | DAN002 | Dancing Shoes | | PRE | Prepaid Con | Kloof | test | 23/03/2016 | 23/03/2021 | Sales Depar | | 60 Months | Months | | 1 |
| | CO000031 | YES001 | Young Electric | | CPC | Cost Per Co | Hilcrest | | 24/03/2016 | 24/03/2021 | Sales Depar | | 60 Months | Months | | 1 |
| | CO0000041 | PAN001 | Panda Copiers | | CPC | Cost Per Co | Main | | 05/07/2016 | 05/07/2021 | Sales Depar | | 60 Months | Months | | 5 |
| Hold History | CO0000042 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Main | | 07/09/2016 | 07/09/2022 | Sales Depar | | 60 Months | Months | | 7 |
| | CO0000043 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Main | | 01/08/2016 | 07/09/2021 | Sales Depar | | 60 Months | Quarterly | | 5 |
| | CO0000052 | HOP001 | Hope Works (Pty) Ltd | | PRE | Prepaid Con | Durban Area | | 29/05/2017 | 29/05/2022 | Sales Depar | | 60 Months | Months | | 3 |
| A second second second | CO000054 | APP0001 | Apple Juice Inc | | CPC | Cost Per Co | Durban Area | | 03/08/2017 | 03/08/2022 | | | 60 Months | Months | | 0 |
| Suspend History | CO0000072 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Durban Area | 1234 | 07/03/2018 | 07/03/2023 | Sales Depar | | 60 Months | Months | | 2 |
| | CO0000073 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Durban Area | | 29/05/2018 | 29/05/2023 | Sales Depar | | 60 Months | Months | | 0 |
| | CO0000074 | DER001 | Derton / Technologies | | CPC | Cost Per Co | Durban Area | 1234 | 15/06/2018 | 15/06/2023 | Sales Depar | | 60 Months | Months | | 6 |
| | CO0000077 | PIN0001 | Pink Shoes | | CPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| | CO0000078 | PIN0001 | Pink Shoes | | CPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| Processing | CO000080 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co | Durban Cen | 1234 | 06/05/2017 | 06/05/2020 | | | 60 Months | Months | | 2 |
| Invoices | CO000082 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Durban Area | | 10/09/2019 | 10/09/2024 | Sales Depar | | 60 Months | Months | | 7 |
| Invoices | CO0000079 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| | CO000083 | WES001 | Westwood Dynamic | | CPC | Cost Per Co | Durban Area | 1234 | 15/10/2019 | 15/10/2024 | Sales Depar | | 60 Months | Months | 1 | 8 |

SELECT THE CONTRACT

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

| | * Format | - 1 <u>5</u> m | nase 🏴 Approve Contract 🕥 Decline Status Processing | Contract | Refred | Current | | Print | , Repo | | | | | | |
|---|--------------------|----------------|--|-----------|----------------------------|--------------|-------------|---------|------------|------------|-------------|----------|-------------|--------------|----------------|
| nks 8 P | Drag a column head | | | | | | | | 100.00.00 | | | | | - | |
| Functions | Contractilo | CustomerC | Customerfiame | Customer0 | ContractType | ContractTy | Location | Ordenio | StartDate | EndDate | Department. | Period - | PeriodType. | BillingCycle | BilingPeriod B |
| rumctions I | CO0000009 | DER001 | Derton / Technologies | ~ | CPC | - | Durban Area | * | 07/05/2014 | 07/05/2019 | Sales Depar | | 0 Months | Months | 3 |
| Notes | C00000016 | TIA001 | Titan Group | | OPC | Cost Per Co | | | 13/06/2014 | 13/06/2019 | Sales Depar | | 0 Months | Months | 4 |
| | C00000018 | 5AM001 | Samanthas Diner | | OC | Cost Per Co. | | | 09/07/2014 | 09/07/2019 | Sales Depar | | 0 Months | Norths | |
| | CO0000019 | OFF001 | Office Supplies Unlimited | | OC | Cost Per Co. | | | 28/07/2014 | 28/07/2019 | Sales Depar | | 0 Months | B-arrual | |
| | PC0000001 | DAN002 | Dancing Shoes | | PRE | Prepaid Con | | test | 23/03/2016 | 23/03/2021 | Sales Depar | | 0 Months | Months | 1 |
| | C00000031 | YE5001 | Young Electric | | OPC | Cost Per Co. | | | 24/03/2016 | 24/03/2021 | Sales Depar | | 0 Months | Norths | 1 |
| | C00000041 | PAN001 | Panda Copiers | | OPC | Cost Per Co. | | | 05/07/2016 | 05/07/2021 | Sales Depar | | 0 Months | Honths | 5 |
| Held History | C00000042 | HOP001 | Hope Works (Pty) Ltd | | OPC | Cost Per Co. | Main | | 07/09/2016 | 07/09/2022 | Sales Depar | | 0 Months | Honths | 7 |
| | C00000043 | HOP001 | Hope Works (Pty) Ltd | | OPC | Cost Per Co. | Main | | 01/08/2016 | 07/09/2021 | Sales Depar | | 0 Months | Quarterly | 5 |
| | C00000052 | HOP001 | Hope Works (Pty) Ltd | | PRE | Prepaid Con. | Durban Area | | 29/05/2017 | 29/05/2022 | Sales Depar | | 0 Months | Honths | 3 |
| | C00000054 | APP0001 | Apple Juice Inc | | OPC | Cost Per Co | Durban Area | | 03/08/2017 | 03/08/2022 | | | 0 Months | Honths | 0 |
| Suppord History | C00000072 | HOP001 | Hope Works (Pty) Ltd | | OPC | Cost Per Co. | Durban Area | 1234 | 07/03/2018 | 07/03/2023 | Sales Depar | | 0 Months | Honths | 2 |
| | C00000073 | HOP001 | Hope Works (Pty) Ltd | | OPC | Cost Per Co | Durban Area | | 29/05/2018 | 29/05/2023 | Sales Depar | | 0 Months | Honths | 0 |
| | C00000074 | DER001 | Derton / Technologies | | OPC | Cost Per Co. | Durban Area | 1234 | 15/06/2018 | 15/06/2023 | Sales Depar | | 0 Months | Honths | 6 |
| | CO0000077 | P040001 | Pirk Shoes | | OPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 0 Months | Honths | 4 |
| | CO000078 | P040001 | Pirk Shoes | | OPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 0 Months | Honths | 4 |
| Processing | C00000080 | OFF001 | Office Supplies Unlimited | | OPC | Cost Per Co. | Durban Cen | 1234 | 06/05/2017 | 06/05/2020 | | | 0 Months | Honths | 2 |
| Invites | C00000082 | HOP001 | Hope Works (Pty) Ltd | | OPC | Cost Per Co | Durban Area | | 10/09/2019 | 10/09/2024 | Sales Depar | | 0 Months | Months | 7 |
| room of the second s | C00000079 | HOP001 | Hope Works (Pty) Ltd | | OPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 0 Months | Honths | 4 |
| | C0000083 | WE5001 | Westwood Dynamic | | OPC | Cost Per Co | Durban Area | 1234 | 15/10/2019 | 15/10/2024 | Sales Depar | | 0 Months | Honths | 8 |

• Click on the **Edit** button.



Link Additional Items

| þ. • | | | | Contract Listi | ng - BPO: Vers | ion 2.5.1.4 - E | xample Comp | any | | | | | | | _ 2 | ÐĢ |
|---------------------------------------|--|--------------------|--|-----------------|------------------|-----------------|----------------------------------|-----------|---------------|------------|-------------|------------|------------|------------|--------------|----|
| Home Equipment | t/Locations Cor | itract Finan | ce / HR Inventory Maintenance / Projec | ts Manufacturin | g Procurem | ent Sales | Service | Reporting | Utilities | | | | | | - 6 | 2 |
| dd Edit Delete View | Save Layou Workspaces Save Filter Format | | end 🚜 Remove From Approval | | Durban Active | | Find Serial No. Find Contract | | Export Report | s | | | | | | |
| | rag a column header | A large to group h | | | | | | | al reterm | | | | | | | |
| nter text to search P | ContractNo | CustomerC | CustomerName | CustomerD | ContractType | ContractTy | Location | OrderNo | StartDate | EndDate | Department | Derind | PeriodType | BilingCyde | BilingPeriod | |
| Functions * | | *Dc | | | RO: | IC: | *D: | +D: | - | = | *D: | = | i Dic | *D: | - | - |
| unccons . | C00000012 | TIA001 | Titan Group | - | CPC | | Durban Area | | 16/05/2014 | 16/05/2019 | Sales Depar | | 60 Months | Months | | 3 |
| Notes | CO0000016 | TIA001 | Titan Group | | CPC | Cost Per Co | | | 13/06/2014 | 13/06/2019 | Sales Depar | | 60 Months | Months | | 4 |
| | CO0000018 | SAM001 | Samanthas Diner | | CPC | | Durban Area | | 09/07/2014 | 09/07/2019 | Sales Depar | | 60 Months | Months | | 5 |
| | CO0000019 | OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co | | | 28/07/2014 | 28/07/2019 | Sales Depar | | 60 Months | Bi-annual | | 6 |
| Documents | CO000031 | YES001 | Young Electric | | CPC | Cost Per Co. | | | 24/03/2016 | 24/03/2021 | Sales Depar | | 60 Months | Months | | 1 |
| | CO0000041 | PAN001 | Panda Copiers | | CPC | Cost Per Co | | | 05/07/2016 | 05/07/2021 | Sales Depar | | 60 Months | Months | | 5 |
| | CO000043 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co. | | | 01/08/2016 | 07/09/2021 | Sales Depar | | 60 Months | Quarterly | | 5 |
| Hold History | CO000072 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Durban Area | 1234 | 07/03/2018 | 07/03/2023 | Sales Depar | | 60 Months | Months | | 2 |
| Hold History | CO000074 | DER001 | Derton / Technologies | | CPC | Cost Per Co | Durban Area | 1234 | 15/06/2018 | 15/06/2023 | Sales Depar | | 60 Months | Months | | 6 |
| | CO0000077 | PIN0001 | Pink Shoes | | OPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| | CO0000078 | PIN0001 | Pink Shoes | | CPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| Suspend History | CO000080 | OFF001 | Office Supplies Unlimited | | OPC | Cost Per Co | Durban Cen | 1234 | 06/05/2017 | 06/05/2020 | | | 60 Months | Months | | 2 |
| | CO000079 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | Durban Area | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| Processing Invokes Credit Notes | | | | | | | | | | | | | | | | |
| en Windows 🕶 | I C | | | | | | | | | | | r : Bianca | | | | |

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

| \$ - | | | Maintenance for Co | ntract No. : COOC | 000016 - Status : A | - BPO: Version 2. | 5.1.4 - Exampl | e Company | | | _ |) & x |
|---|------------------------|---------------------------|-------------------------------|-------------------|---------------------|-------------------|----------------|--------------|-----------|--------------------------------|--------------|------------|
| Home Equipmen | t / Locations Contract | Finance / HR Inv | entory Maintenance / Projects | Manufacturing | Procurement | Sales Service | Reporting | Utilities | | | - | . & x |
| Save Back Save Layout | Workspaces | | | | | | | | | | | |
| Process a Form | nat 🦼 | | | | | | | | | | | \diamond |
| Unks # Enter text to search P Functions | | | 8 | | | | | | | | | Use |
| Enter text to search P | 1 | | | PartCode | Description | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccoun | SLAHou & |
| Functions | Contract No | | | Y 400 | -O- | * 0 : | (0) | (D) | a⊡c | (D) | (D) | - 2 |
| Life | Contract Type | Cost Per Copy | · · · | | SP19-12 Colour Cop | er SP19-12185 | | | Reception | 658 Dime Road, South Riding, , | 2101 | |
| B Notes | Contract Class | | • | * | | | | | | | | |
| Life Based Billing | Contract Category | | • | | | | | | | | | |
| Documents | Start Date | 13/06/2014 🔹 | | | | | | | | | | |
| | End Date | | | | | | | | | | | |
| | Period | 60 🗘 * | | | | | | | | | | |
| Hold History | Period Type | Months | * * | | | | | | | | | |
| | Department | Sales Department | • | | | | | | | | | |
| | Contract Manager | Carolina Suzzetta Lourens | van de 🔻 * | | | | | | | | | |
| Suspend History | Salesman | Belinda Sharman | * * | | | | | | | | | |
| | Aggregate Billing | 3 | | | | | | | | | | |
| | Hide Fee Detail | 3 | | | | | | | | | | |
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| | Contract Info Cus | stomer Info Billing Info | Rental Info | | | | | | | | | |
| Open Windows 🕶 | | | | | | | | | User | Bianca 09/02/2023 Version : 2 | .5.1.4 Examp | le Company |

CONTRACT ITEMS FRAME

• Right click anywhere in the row of the Contract Items frame.



| ٩ | | | | | | Maintenan | ce for Contract | No. : CO0000041 - State | us : A - BPO: Ve | rsion 2.5.1.4 | Example Co | npany | | | - 8 | x |
|--------------------|----------|-----------------|---------------------------------|---------------------|-------------------|----------------|-----------------|-------------------------|------------------|---------------|--------------|-----------|-------------------------------|-------------------|--------------|-------|
| | - | Home Equipment | /Locations Contrac | ct Finance / HR | Inventory M | aintenance / P | Projects Manu | facturing Procurement | t Sales | Service Re | porting Uti | ities | | | - 8 | × |
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| | - | ack Save Layout | | | | | | | | | | | | | | |
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| egst. | | | Contract No | 000000044 | | | PartCode | Description | SerialNo | | LocationDesc | | ShippingAddress | COSAccoun | | Tasks |
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| Life E | Not | inc. | Contract Type Contract Class | | • | | E SP2020 | SP2020 Sprint Colour | 2020-103050 | AREG000046 | | Reception | 25 Lonestar Road, Ranchville, | 2100 | 24.00 | - |
| lased | | ~ | | | | | • | | | | | | | | | 1 L |
| Life Based Billing | | | Contract Category | | • | | | | | | | | | | | |
| a | Doc | cuments | | • 05/07/2016 • | | | | | | | | | | | | |
| | | | | 05/07/2021 • | | | | | | | | | | | | |
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| | Hold | d History | Period Type | | • | | | | | | | | | | | |
| | | | | Sales Department | • | | | | | | | | | | | |
| | | | Contract Manager | | • | | | | | | | | | | | |
| | Sug | pend History | | Bianca Du Toit | • | • | | | | | | | | | | |
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| Op | en Windo | ws 🕶 | | | | | | | | | | | User : Bianca 31/01/2023 V | lersion : 2.5.1.4 | Example Comp | pany |

- A Process menu will pop up.
- From this menu, you can:
 - Add a new machine item
 - Add a new location item
 - Delete a contract item

| e Back Save Layout | • | | | | | | | | | | |
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| rocess a Form Links # | Contract Info | Prag a column h | header here to group by the | st column | | | | | | | |
| Enter text to search P | | PartCode | Description | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccoun | SLAHours | |
| Functions | Contract No CO0000041 | ▼ #0: | (D) | 1 0 0 | • 0 : | • D ¢ | 4 0 4 | 1 0 × | (D) | - | |
| Notes | Contract Type Cost Per Copy * | | SP2020 Sprint Colour | 2020-103050 | AREG000046 | | Reception | 25 Lonestar Road, Ranchville, | . 2100 | 24.00 | 0 |
| Notes | Contract Class • | • | Proce | | | | | | | | |
| | Contract Category - | | | | | | | | | | |
| Documents | Start Date 05/07/2016 - | | 0 | Machine Add New Machine | Item | | | | | | |
| | End Date 05/07/2021 - | | 14 | Location Add New Location | | | | | | | |
| | Period 60 🗘 * | | | | Item | | | | | | |
| Hold History | Period Type Months * | | 0 | Delete Delete Item | - | | | | | | |
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| | Department Sales Department • | | | | | | | | | | |
| | Contract Manager Bianca Du Toit • | | | | | | | | | | |
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| Suspend History | Contract Manager Bianca Du Toit | | | | | | | | | | |
| Suspend History | Contract Manager Bianca Du Toit • Salesman Bianca Du Toit • | | | | | | | | | | |
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| Processing | Contract Manager Bianca Du Toit | | | | | | | | | | |



ADD NEW MACHINE ITEM

Where you have a serialised item that requires maintenance or service, the item can be linked to the contract.

• Click on Machine - Add New Machine Item.

| \$ • | | | | | Maintena | ince f | or Contract | No. : CO000004 | 1 - Statu | is : A - BPO: Ve | rsion 2.5.1.4 - | Example Cor | mpany | | | | 8 x |
|---------------------------|-------------|------------------|--------------------|------------------|---------------|---------|--------------|-----------------|-----------|----------------------------------|-----------------|--------------|--------------|-------------------------------|-------------------|----------|---------|
| Home | Equipment | Locations Cont | tract Finance / F | R Inventory | Maintenance / | / Proje | ects Manu | facturing Pro | curement | Sales | Service Rep | orting Util | lties | | | - | 8 × |
| H Co Save Back | Save Layout | Workspaces | | | | | | | | | | | | | | | |
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| Enter text to se | earch P | | | | | | PartCode | Description | | SerialNo | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccoun | SLAHours | Tra 🖁 |
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| Life | | | Cost Per Copy | |] • • | | ⊞ SP2020 | SP2020 Sprint (| Colour | 2020-103050 | AREG000046 | | Reception | 25 Lonestar Road, Ranchville, | 2100 | 24 | |
| B Notes | | Contract Cla | | | • | ۲ | | | | | | | | | | | |
| Life Notes | | Contract Catego | ρrγ | | * | | | | Proces | | ~ | | | | | | |
| Documents | | Start Da | ate 05/07/2016 | • | | | | | G A | tachine dd New Machine | Item 🖛 | | | | | | |
| Dotoments | | End Da | ite 05/07/2021 | - | | | | | pr b | ocation | | | | | | | |
| | | Peri | od 60 | ¢ * | | | | | · ^ | dd New Location | Item | | | | | | |
| Hold Histor | rv | Period Ty | pe Months | | - • | | | | 🔞 🖥 | elete elete Item | | | | | | | |
| | | Departme | ant Sales Departme | int | • • | | | | | | | | | | | | |
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| Suspend H | fistory | Salesm | an Bianca Du Toit | | | | | | | | | | | | | | |
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| | | Contract Info | Customer Info | 081-6 D | 17-6- | | | | | | | | | | | | |
| | | Contract Info | customer Into | Biling Info Rent | tal Info | 4 | | | | | | | | | | | • |
| Open Windows 🕶 | | | | | | | | | | | | | | User : Bianca 31/01/2023 | Version : 2.5.1.4 | Example | Company |

- The Select a new item pop up screen will appear, listing all <u>cus</u>tomer assets sold to or created against this customer; or <u>rental</u> <u>assets issued</u> to this customer.
- Select the **row** of the **item** that you wish to **link** to this contract.
- Click on **Ok**.



| 🗢 👻 Home Equipment | nt / Locations Contract Finance / HR Inventory ! | | | : CO0000041 - Statu uring Procurement | | | | | | | | | 8 X 8 X |
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- The following columns will auto populate according to your item selection:
 - Part Code
 - Description
 - Category Description
 - Model No if configured on the asset's part code
 - Serial No
 - Asset Register No if configured on the asset

Note: The **LocationDesc** column will not be populated as this is a Machine (asset) Contract item and not a Location Contract Item.



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| Open | Windows 🕶 | | | | | | | | | | | | | User : Bianca | 31/01/2023 Version : 2.5.1.4 Example 0 | Company |

ADD NEW LOCATION ITEM

Instead of linking a serialised item, you have the ability to link a location to the contract. This can be used where a room or building requires maintenance or service.

- 🗘 🔹 Home Equip Save Back Save Layout Workspace PartCode Des ♥ (0: (0: E SP2020 SP2 Functions Contract No Contract Type Cost Per Copy Contract Class Machine Add New Machine Item Start Date 05/07/2016 End Date 05/07/2021 . P Add New Location Item 60 🛟 Period Delete Delete Item Period Type Months •• ent Sales D ct Manager Bianca Du Toit Salesman Bianca Du Toit Aggregate Billing 🗌 Hide Fee Detail 🛄 Contract Info Customer Info Biling Info Rental Info User : Bianca 31/01/2023 Version : 2.5.1.4 Example
- Click on Location Add New Location Item.



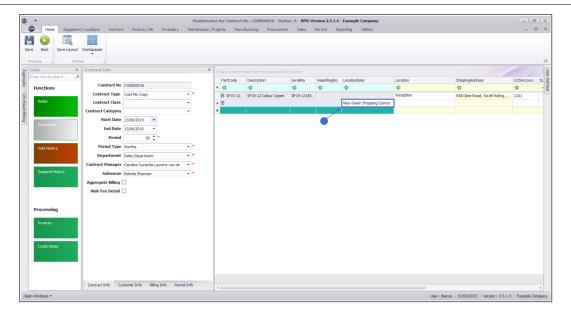
- The **Select a new item** pop up screen will appear, listing all <u>cus</u>tomer locations.
- Select the **row** of the **item** that you wish to **link** to this contract.
- Click on **Ok**.

| 🔿 👻 Mainten | ince for Con | ntract N | No.:CO0000016 - Statu | s:A - BPO: V | ersion 2.5.1.4 | - Example Co | npany | | | | | | P X |
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| | | So | uth Riding Centre - First Flo | or MB | | DEDEDE | DEDE | DE | No | Yes | Yes | | |
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| Open Windows * | | | | | | | | | User : Bia | inca 01/02/202 | 23 Version : 2.5.1 | .4 Example O | ompany |

- The following columns will auto populate according to your item selection:
 - LocationDesc
 - Description
 - Category Description
 - Model No if configured on the asset's part code
 - Serial No
 - Asset Register No if configured on the asset

Note: The PartCode, Description, Category Description, Model No, Serial Number, and Asset Register No columns will not be populated as this is a Location Contract item and not a Machine (asset) Contract Item.





CONTRACT ITEM MAIN DETAILS

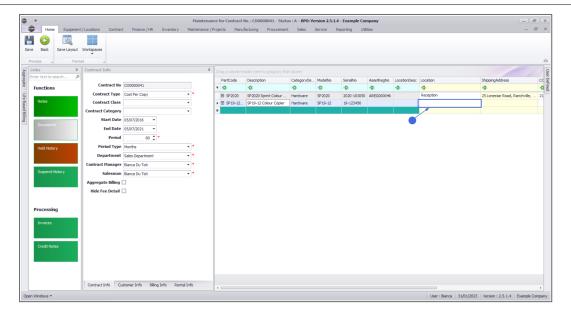
Whether you are linking a Machine or Location, the following item details should be configured.

Link Location

This is the location of the contract item, e.g. Reception, used to assist the technician with finding the item on site.

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





Link Shipping Address

This is the physical address where the contract item is.

A new company config flag (<u>AutoUpdateShippingAddress</u>) is available in BPO2 v2.5.0.8 (or higher) / Nucleus Service to control automated shipping address updates in the system between contract items and equipment shipping addresses/ functional location shipping address and ensures the shipping address correlates to contract items shipping address. When you update the shipping address on a contract the shipping address will reflect on the asset or functional location. If the user updates the asset or functional location's shipping address, the shipping address will reflect on the contract item.

- Click in the Shipping Address text box.
- An ellipsis button will be revealed.
- Click on this button to display the **Select a shipping address** pop up screen.
- Select the **row**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) if applicable.
 - Note 1: If this is set up, SLA will apply every time a call is logged against the contract / contract item. SLA will be calculated based on the shift pattern (customer's trading hours) e.g. if the trading hours are from 8am -5pm and a call is logged at 4pm, SLA will start calculating at 4pm and stop at 5pm and resume the following day at 8am.
 - Note 2: For SLA to work, the shift must be set up in BPO Configurator and linked to the customer.
 - Note 3: The SLA Monitoring Service must be <u>installed</u>, <u>configured</u> and running to fully utilise this functionality.

| End Date 05/07/2021 | • | | | io LocationDes | c Location 48: Reception | | ShippingAddress -Q -25 Lonestar Road, Ranchville, 25 Lonestar Road, Ranchville, | COSAccourt. •©: 2100 2100 9 9 9 9 9 9 9 9 9 9 9 9 9 | SLAHours | - 0 0 | | | Status •O: A A |
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Link Travel Radius and Travel Charge

If you need to ensure travel is charged each time a call is raised for the contract item, set up a **Travel Radius** (distance) and **Travel Charge Rate** (per km). Also see **Travel Radii**.

- Click in the Travel Radius text box.
- Type in or use the arrow indicators to select the distance in km 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.
- 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).
 - Note: If you input a non-zero value, each time a call is logged against the contract item and the technician travels outside the specified Travel Radius, the Travel Charge Rate will be applied. You will not be able to close the call until the travel charges incurred are invoiced.



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| | | ncuon | 5 | | Contract Ty | pe Cost Pe | Сору | • • | | AREG000046 | - W - | Reception | | 25 Lonestar Road, Ranchville, | 2100 | 24.0 | | 0.0 | | A | 8 |
| fe Ba | | | | | Contract Cl | ass | | • | | • | | | | 25 Lonestar Road, Ranchville, | | 24.0 | | | _ | A | |
| Life Based Billing | | | | | Contract Categ | ory | | - | | • | | | | | | | 1 | | 8 | | |
| Illing | | | | | Start D | ate 05/07/2 | 016 🔻 | | | | | | | | | | | | | | |
| | 1 | | | | End D | ate 05/07/2 | 021 - | | _ | | | | | | | | | | | | |
| | 1. | | | | Per | riod | 60 🗘 * | | _ | | | | | | | | | | | | |
| | 1.1 | Hold Hist: | ory | | Period T | ype Months | | - * | _ | | | | | | | | | | | | |
| | | | | | Departm | ent Sales D | partment | • • | _ | | | | | | | | | | | | |
| | 1.5 | | | | Contract Mana | ger Bianca (| lu Toit | - * | _ | | | | | | | | | | | | |
| | | | | | Salesn | man Bianca (| lu Toit | - * | _ | | | | | | | | | | | | |
| | | | | | Aggregate Bill | ing 🗌 | | | _ | | | | | | | | | | | | |
| | 17 | | | | Hide Fee Det | tail 🗌 | | | _ | | | | | | | | | | | | |
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| | PI | ocessi | ng | | | | | | _ | | | | | | | | | | | | |
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| | 1. | | | | | | | | _ | | | | | | | | | | | | |
| | 1.1 | Credit No | ites | | | | | | _ | | | | | | | | | | | | |
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| | 12 | | | _ | | | | | _ | | | | | | | | | | | | |
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| | | | | | | | 1 | | _ | | | | | | | | | | | | |
| | | | | | Contract Info | Customer In | fo Biling Info | Rental Info | | 4 | | | | | | | | | | | • |
| 0 | pen Wi | ndows 🕶 | | | | | | | | | | | | | | Use | r:Bianca 31, | 01/2023 Ven | sion: 2.5.1.4 | Example Comp | any |

- The **Is Extra** flag is to indicate whether the item is an accessory to the main item on contract.
- The **Status** field is static and there to show you the that the item is active.

CONTRACT ITEM ADDITIONAL DETAILS

Whether you are linking a Machine or Location, the following item details should be configured, where applicable.



| Home Equipment / L Back Save Layout W Format Inks # inter text to search P | | Finance / HR Inventory M | Maintenance / Pr | ojects | Man | utacturir | g Procurem | nt sales | Service F | (eporting) | | | | | | | P |
|--|-------------------|------------------------------------|------------------|--------|-----------|--------------|------------------|-------------------------|--------------|--------------|-----------------|--------------------|--------------------------|--------------------------|-----------------|--------------|-------|
| nks 7 | • | | | | | | | | | | o di oco | | | | | | |
| inks a | Zontract Info | | | | | | | | | | | | | | | | |
| | Contract Info | | | | | | | | | | | | | | | | |
| nter text to search P | | | 4 | | | | | | | | | | | | | | |
| | | | . [| Par | tCode | Desc | iption | SerialNo | AssetRegNo | LocationDe | sc | Location | | ShippingAddr | 555 | COSAccou | m |
| Functions | Contract No | | | ۲ (D | | ۲ ۵ ۲ | | (D) | 4 0 4 | * 0 ¢ | | 1 0 : | | 1 0 1 | | 4 0 4 | |
| Notes | Contract Type | | | • 🗄 | SP 19-12. | | -12 Colour Copie | SP19-1218 | | | | Reception | | 658 Dime Roa | d, South Riding | , 2101 | |
| | Contract Class | • | | | | | tem Meters It | | | | | | | | | | |
| 1 (1) (1) (1) (1) (1) (1) (1) (1) (1) (1 | Contract Category | | | | 9. Mar | | FeeType | | ChargeAmo | | | InvoiceDescription | StartDate | EndDate | Period | PeriodType | Billi |
| Documents | Start Date | 13/06/2014 🔻 | | | Υ | | -O: | 1 0 : | - | -O: | * 0 : | 0 | - | - | - | - | - |
| | End Date | | | | | | E | Evergreen Inhouse Re | 0.000 | | | | 13/06/2014 13/06/2014 | 13/06/2019 13/06/2019 | | Months | Mor |
| | Period | 60 🌲 * | | | | H | L | Loan | 0.000 | | | | 13/06/2014 | 13/06/2019 | | Months | Mo |
| Hold History | Period Type | Months • | • | | | | N | Insurance | 0.000 | | | | 13/06/2014 | 13/06/2019 | | Months | Mo |
| | Department | Sales Department | • | | E | | R | Bank Rental | 0.000 | 1204 | | | 13/06/2014 | 13/06/2019 | 60 | Months | Mo |
| | Contract Manager | Carolina Suzzetta Lourens van de • | • | | | | REN | Standard R | 0.000 | 1202 | | | 13/06/2014 | 13/06/2019 | 60 | Months | Mo |
| Suspend History | | | | | | | S | Service | 0.000 | | | | 13/06/2014 | 13/06/2019 | 60 | Months | Mor |
| | Aggregate Billing | | · · · · | | | | W | Renew Fee | 0.000 | 1101 | | | 13/06/2014 | 13/06/2019 | 60 | Months | Mor |
| | Hide Fee Detail | | | | | | | | 0.00 | | | | | | | | |
| | nde ree Detail | 4 | | | • | | | | | | - | | | | | | Þ |
| | | | | Ħ | | | | | | New Green | Shopping Centre | 2 | | | | | |
| Processing | | | | • | | | | | | | | | | | | | |

- Here you can click on four different tabs to add or edit:
 - Item Fees: periodic charges e.g. monthly
 - Item Meters: meter usage charges
 - Item Inclusions: non billable items that are included in the contract
 - Item Contacts: the contact person per machine.

SAVE THE CONTRACT

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

Help v2024.5.0.7/1.0 - Pg 15 - Printed: 04/07/2024



|) v | | | | faintenance for | r Contract No. : CO00000 | 16 - Status : A - B | BPO: Version | 2.5.1.4 - Example Comp | bany | | _ | 8 |
|--|-------------------|-------------------------------|-----------------|--------------------|--------------------------|---------------------|--------------|------------------------|--------------|--------------------------------|------------------------|------|
| Home Equipment / L | ocations Contract | Finance / HR | Inventory Mai | ntenance / Project | ts Manufacturing P | ocurement Sale | es Service | e Reporting Utilitie | 5 | | - | Ð |
| ave Back Save Layout W | lorkspaces | | | | | | | | | | | |
| Process a Format | | | | | | | | | | | | _ |
| Links # C Enter text to search P | Customer Info | | | Drag a column | | | | | | | | |
| | | | | PartCode | | | AssetRegNo | LocationDesc | Location | ShippingAddress | COSAccoun | SLAH |
| Functions | Customer 1 | | • م | ▼ (0): | (D) | - | (D) | 4 0 4 | 4 0 : | 4 0 4 | ID | - |
| | | 558 Dime Road South Riding | , р ^ • | ▶ | 2 SP 19-12 Colour Copier | SP19-12185 | | | Reception | 658 Dime Road, South Riding, , | . 2101 | |
| Notes | | | | • | | | | | | | | |
| | | 1478 | | | | | | | | | | |
| Documents | Order No | | | | | | | | | | | |
| Cocomenta | Required | | | | | | | | | | | |
| | Location 1 | Main | * * | | | | | | | | | |
| Hold History | | | | | | | | | | | | |
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| Suspend History | | | | | | | | | | | | |
| Suspend History Processing | | | | | | | | | | | | |
| Suspend History Processing Invoices | | | | | | | | | | | | |
| Support Helitary Processing Invokes Credit Notes | Contract Info Cut | stoner Info Billing In | nfo Rental Info | | | | | | | | | |

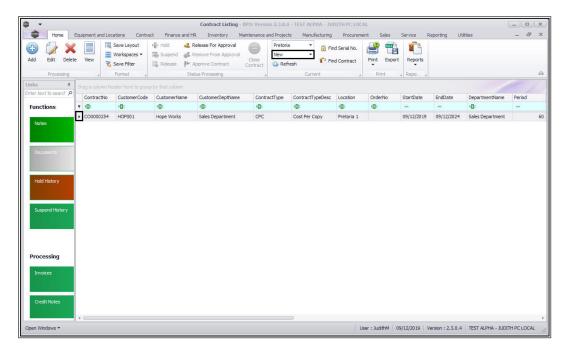
- The contract will be saved and you will return to the Contract Listing screen where the status defaults to Active, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.

| ≱ | | | | Contract Listi | ng - BPO: Ve | rsion 2.5.1.4 - E | xample Comp | any | | | | | | | - 8 | X |
|------------------------|-------------------------------|------------------|---|----------------|---------------------------------|----------------------------|-----------------|-----------|-----------------------|-----------------------|----------------------------|--------|------------|---------------------|---------------|---|
| Home Equipme | ent / Locations Co | ntract Finar | nce / HR Inventory Maintenance / Projects | s Manufacturin | g Procure | ement Sales | Service | Reporting | Utilities | | | | | | - 6 | 2 |
| Add Edit Delete Vie | Workspace | s 🔹 😽 Sus | pend 🚜 Remove From Approval | | Durban Active Status N | A StatusDesc | Find Serial No. | | Export Report | s | | | | | | 6 |
| inks # | - | | | | R | Released Active | | | a nepo | 4 | | | | | /// | |
| Enter text to search P | Drag a column heade | | | | Ĥ | Hold | | | | | | | | | | |
| Functions | ContractNo | CustomerC | CustomerName | CustomerD | Co P C | Suspend Closed | | rderNo | StartDate | EndDate | Department | Period | PeriodType | BilingCycle | BillingPeriod | B |
| runcuons | CO0000016 | TIA001 | Titan Group | 100 | X | Deleted | | r | 13/06/2014 | 13/06/2019 | Sales Depar | | 60 Months | Months | | 4 |
| Notes | | | Samanthas Diner | | CP X | | | <u>//</u> | | | | | 60 Months | Months | | 5 |
| | CO0000018 CO0000019 | SAM001 OFF001 | Office Supplies Unlimited | | CPC | Cost Per Co Cost Per Co | | | 09/07/2014 28/07/2014 | 09/07/2019 28/07/2019 | Sales Depar Sales Depar | | 60 Months | Months Bi-annual | | 5 |
| | CO0000019 | YES001 | Young Electric | | CPC | Cost Per Co | | | 24/03/2014 | 28/07/2019 | Sales Depar | | 60 Months | Months | | 0 |
| Documents | C00000031 | PAN001 | Panda Copiers | | CPC | Cost Per Co | | | 05/07/2016 | 24/03/2021 | Sales Depar | | 60 Months | Months | | 1 |
| Coccilians. | C00000041 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | | | 01/08/2016 | 05/07/2021 | Sales Depar | | 60 Months | Ouarterly | | 5 |
| | C00000072 | HOP001 | Hope Works (Pty) Ltd | | CPC | | Durban Area | 1724 | 07/03/2018 | 07/03/2023 | Sales Depar | | 60 Months | Months | | 2 |
| | C00000074 | DER001 | Derton / Technologies | | CPC | | Durban Area | | 15/06/2018 | 15/06/2023 | Sales Depar | | 60 Months | Months | | 6 |
| Hold History | C00000077 | PIN0001 | Pink Shoes | | CPC | Cost Per Co | | 12.51 | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| | C00000078 | PIN0001 | Pink Shoes | | CPC | Cost Per Co | | | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| | CO0000080 | OFF001 | Office Supplies Unlimited | | CPC | | Durban Cen | 1224 | 06/05/2018 | 16/06/2023 | Sales Depar | | 60 Months | Months | | 2 |
| Suspend History | CO0000079 | HOP001 | Hope Works (Pty) Ltd | | CPC | Cost Per Co | | 1634 | 18/06/2018 | 18/06/2023 | Sales Depar | | 60 Months | Months | | 4 |
| | | | | | | | | | | | | | | | | |
| Processing | | | | | | | | | | | | | | | | |
| Credit Notes | | | | | | | | | | | | | | | | |
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• **New** contracts can be found within the **New** contract status listing screen.



- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- Edited contracts may either remain in Active status or move to Released status in order for changes to be reviewed before Approval depending on the change made.



MNU.112.019