

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

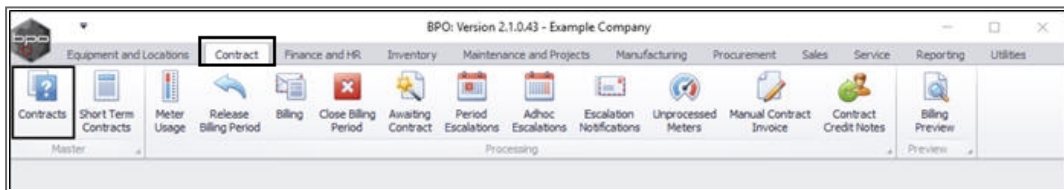
CONTRACT

CONTRACTS – RELEASE FOR APPROVAL

Contracts need to be **released** and **approved**, thereby making them **active**. These active contracts will then be included in the month end billing run and calls can be logged against them.

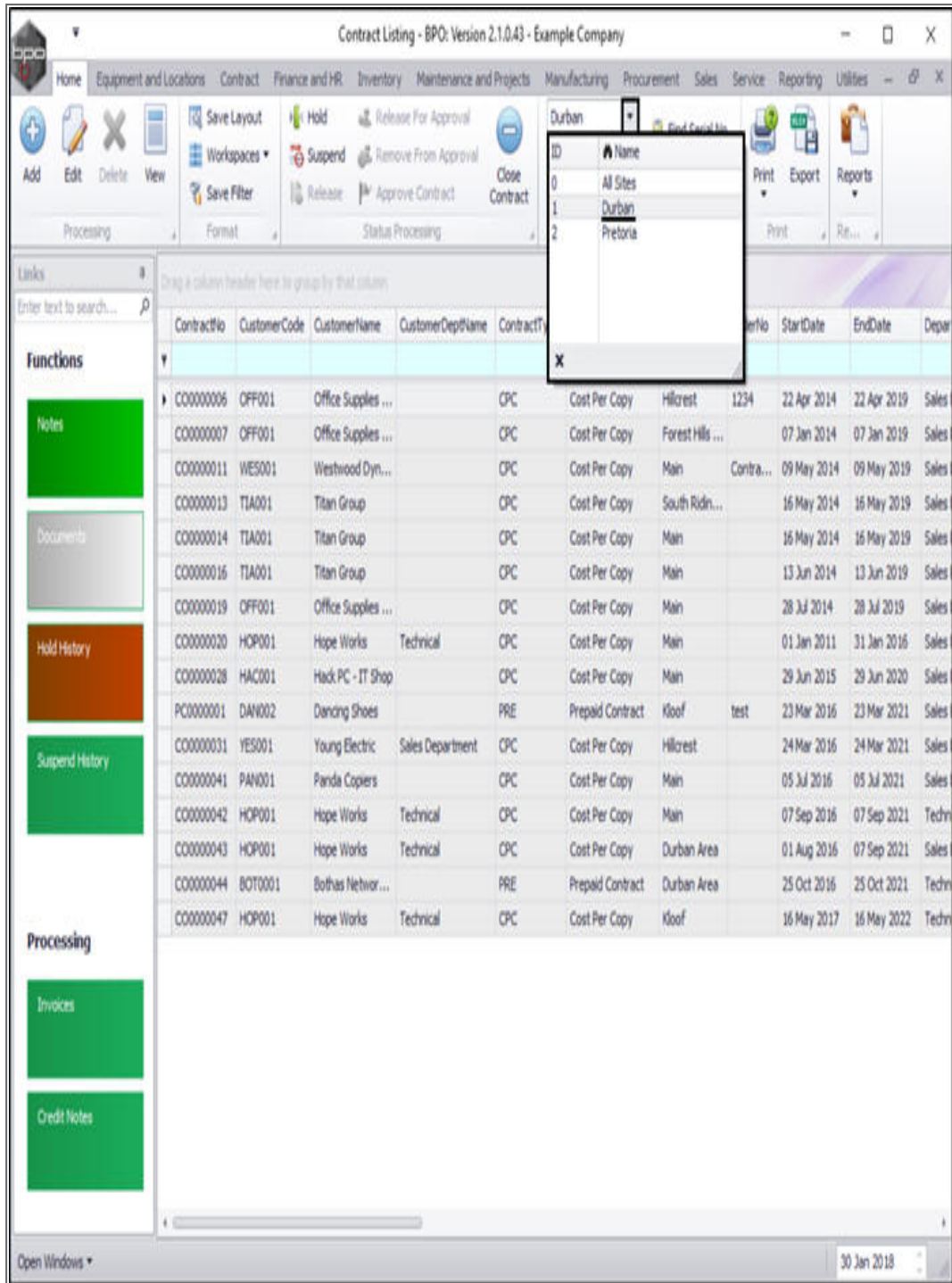
Follow the process below to **release** a Contract for approval.

Ribbon Access: Contract > Contracts



The **Contract Listing** screen will display.

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



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

- Click on the **drop-down arrow** in the **Status** field and select the **New** status.

The screenshot shows the 'Contract Listing - BPO: Version 2.1.0.43 - Example Company' interface. A dropdown menu is open over the 'Status' column of a table, showing options: New, Released, Active, Hold, Deleted, Closed, and Suspend. The 'New' option is highlighted. The table contains contract records with columns for ContractNo, CustomerCode, CustomerName, CustomerDeptName, ContractType, and various dates.

| ContractNo | CustomerCode | CustomerName | CustomerDeptName | ContractType | ContractStatus | ContractDesc | ContractNo | StartDate | EndDate | Depart |
|------------|--------------|-------------------|------------------|--------------|------------------|------------------|------------|-------------|-------------|--------|
| CO000006 | OFF001 | Office Suppl... | | CPC | | | | 22 Apr 2014 | 22 Apr 2019 | Sales |
| CO000007 | OFF001 | Office Suppl... | | CPC | Cost Per Copy | Forest Hills ... | | 07 Jan 2014 | 07 Jan 2019 | Sales |
| CO000011 | WES001 | Westwood Dyn... | | CPC | Cost Per Copy | Main | Contra... | 09 May 2014 | 09 May 2019 | Sales |
| CO000013 | TIA001 | Titan Group | | CPC | Cost Per Copy | South Ridn... | | 16 May 2014 | 16 May 2019 | Sales |
| CO000014 | TIA001 | Titan Group | | CPC | Cost Per Copy | Main | | 16 May 2014 | 16 May 2019 | Sales |
| CO000016 | TIA001 | Titan Group | | CPC | Cost Per Copy | Main | | 13 Jun 2014 | 13 Jun 2019 | Sales |
| CO000019 | OFF001 | Office Suppl... | | CPC | Cost Per Copy | Main | | 28 Jul 2014 | 28 Jul 2019 | Sales |
| CO000020 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Main | | 01 Jan 2011 | 31 Jan 2016 | Sales |
| CO000028 | HAC001 | Hack PC - IT Shop | | CPC | Cost Per Copy | Main | | 29 Jun 2015 | 29 Jun 2020 | Sales |
| PC000001 | DAN002 | Dancing Shoes | | PRE | Prepaid Contract | Koof | test | 23 Mar 2016 | 23 Mar 2021 | Sales |
| CO000031 | YES001 | Young Electric | Sales Department | CPC | Cost Per Copy | Hillcrest | | 24 Mar 2016 | 24 Mar 2021 | Sales |
| CO000041 | PAN001 | Panda Copiers | | CPC | Cost Per Copy | Main | | 05 Jul 2016 | 05 Jul 2021 | Sales |
| CO000042 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Main | | 07 Sep 2016 | 07 Sep 2021 | Techn |
| CO000043 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Durban Area | | 01 Aug 2016 | 07 Sep 2021 | Sales |
| CO000044 | BOT001 | Bothas Networ... | | PRE | Prepaid Contract | Durban Area | | 25 Oct 2016 | 25 Oct 2021 | Techn |
| CO000047 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Koof | | 16 May 2017 | 16 May 2022 | Techn |

SELECT CONTRACT

- Select the **row** of the contract you wish to **release**.

RELEASE CONTRACT

- Click on **Release For Approval**.

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

Save Layout Hold Release For Approval Durban Find Serial No. Find Contract Print Export Reports

Add Edit Delete View Workspaces Save Filter Suspend Remove From Approval Close 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 | EndDate | Depart |
|------------|--------------|-------------------|------------------|--------------|------------------|------------------|----------|-------------|-------------|--------|
| CO0000009 | DER001 | Derton Technol... | | CPC | Cost Per Copy | Forest Hills ... | | 07 May 2014 | 07 May 2019 | Sales |
| CO0000050 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Durban Area | | 23 May 2017 | 23 May 2022 | Sales |
| CO0000052 | HOP001 | Hope Works | Technical | PRE | Prepaid Contract | Durban Area | | 29 May 2017 | 29 May 2022 | Sales |
| CO0000054 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Durban Area | New D... | 01 Jan 2018 | 31 Dec 2022 | Sales |

Functions

Notes

Documents

Hold History

Suspend History

Processing

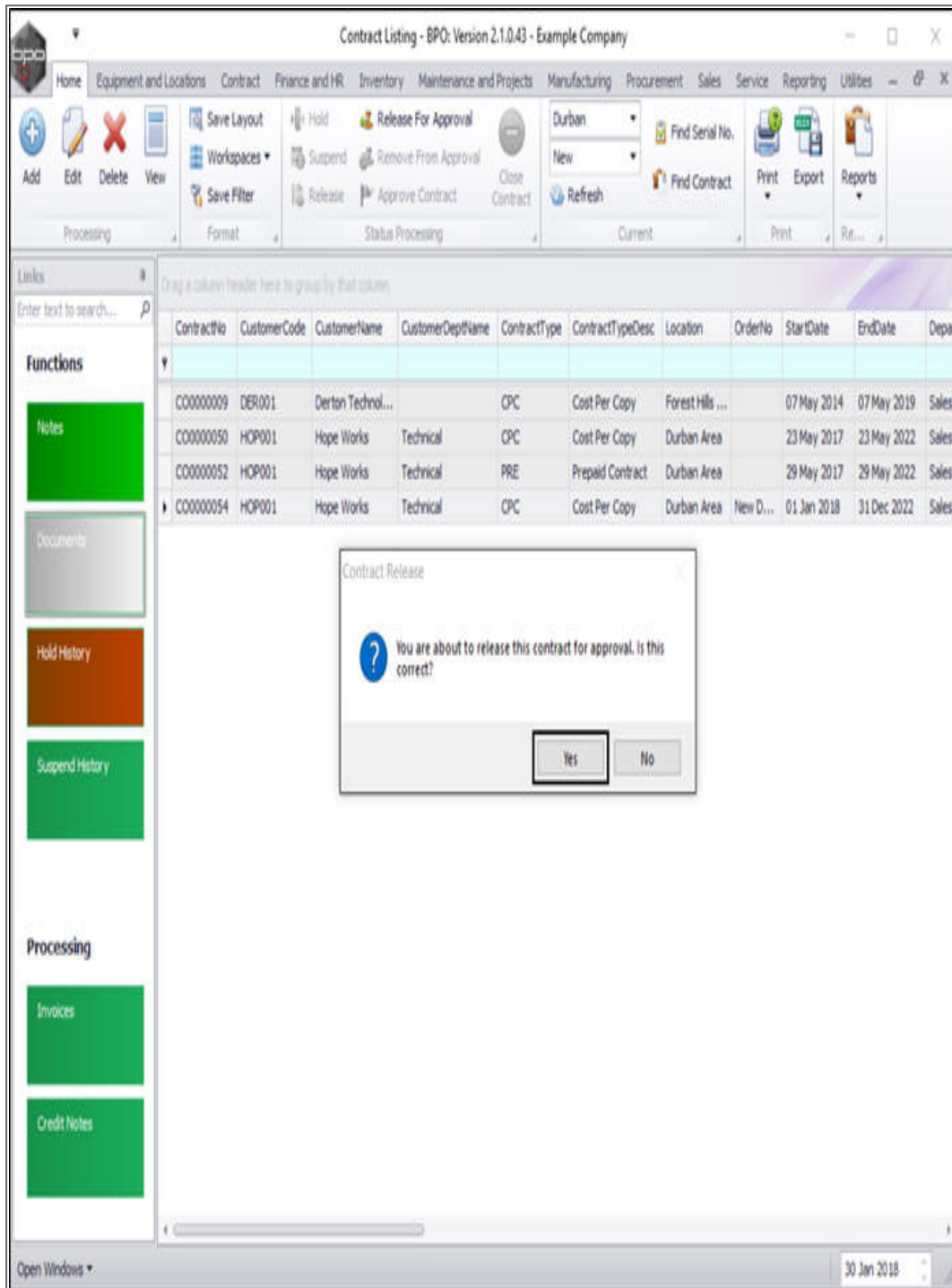
Invoices

Credit Notes

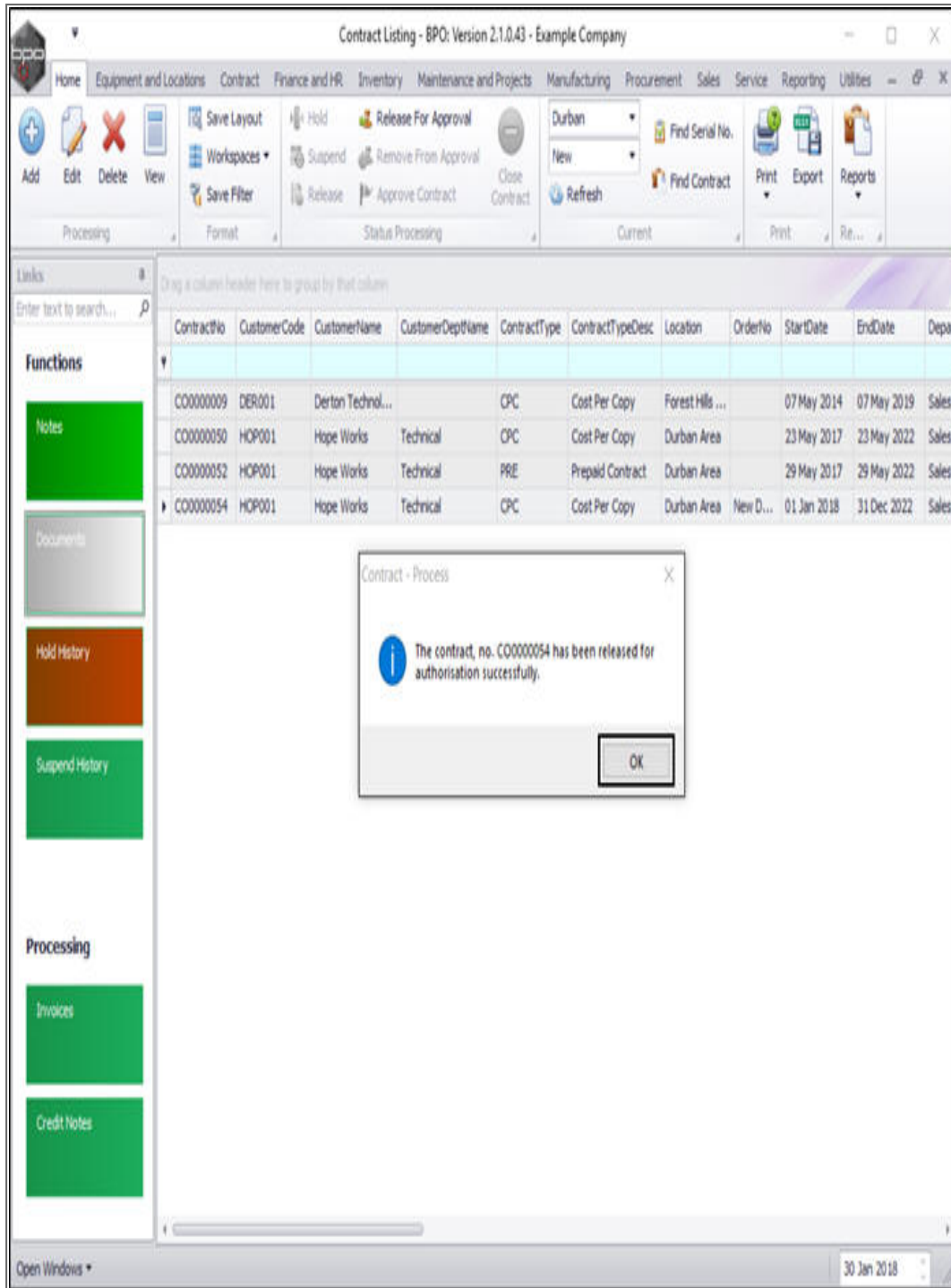
Open Windows 30 Jan 2018

- A **Contract Release** message box will pop up with the following prompt:

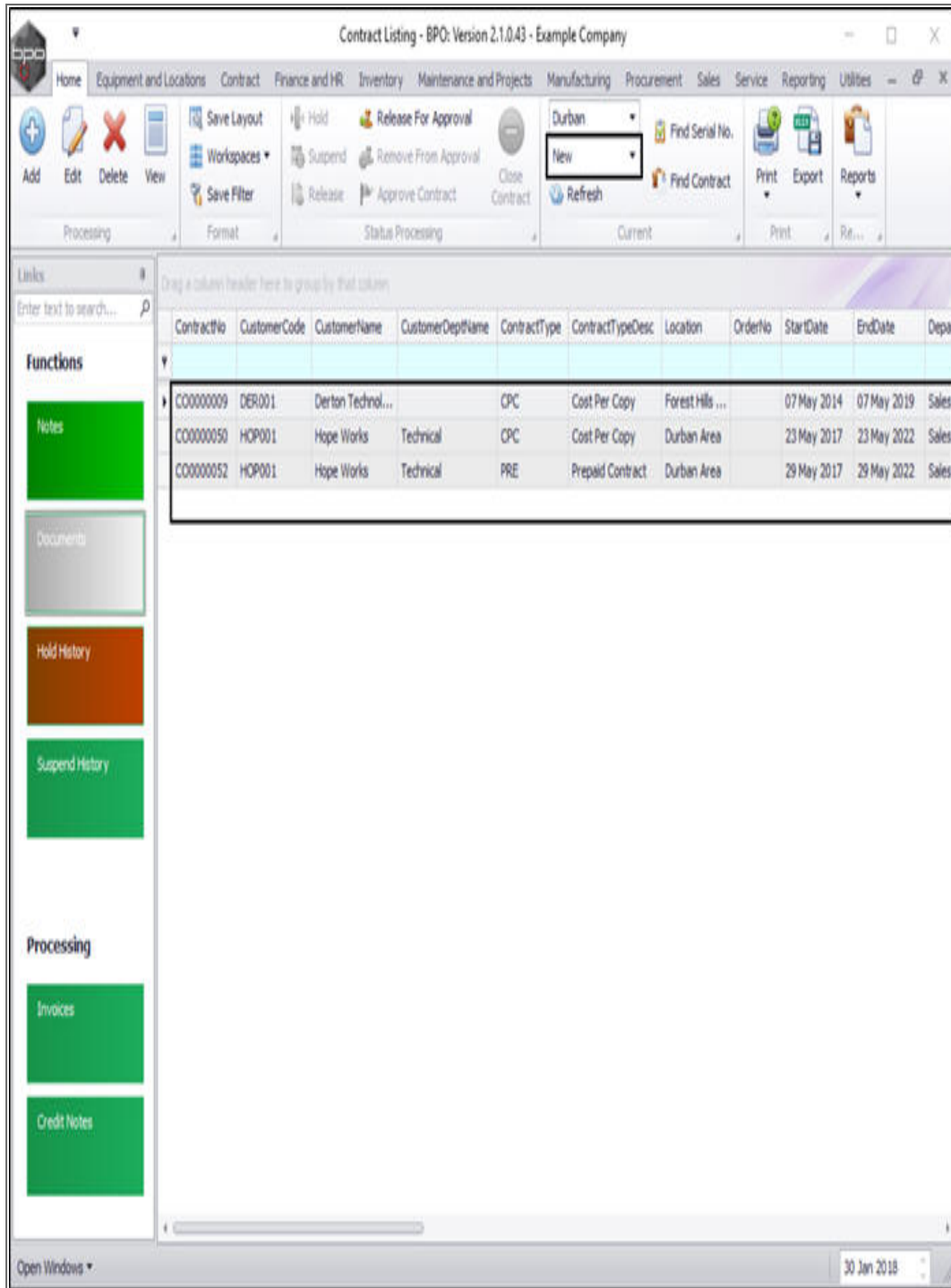
- You are about to release the contract for approval, is this correct?
- Click on **Yes**.



- A **Contract - Process** message box will pop up advising the following:
 - The contract, no. [] has been released for authorisation successfully.
- Click on **Ok**.

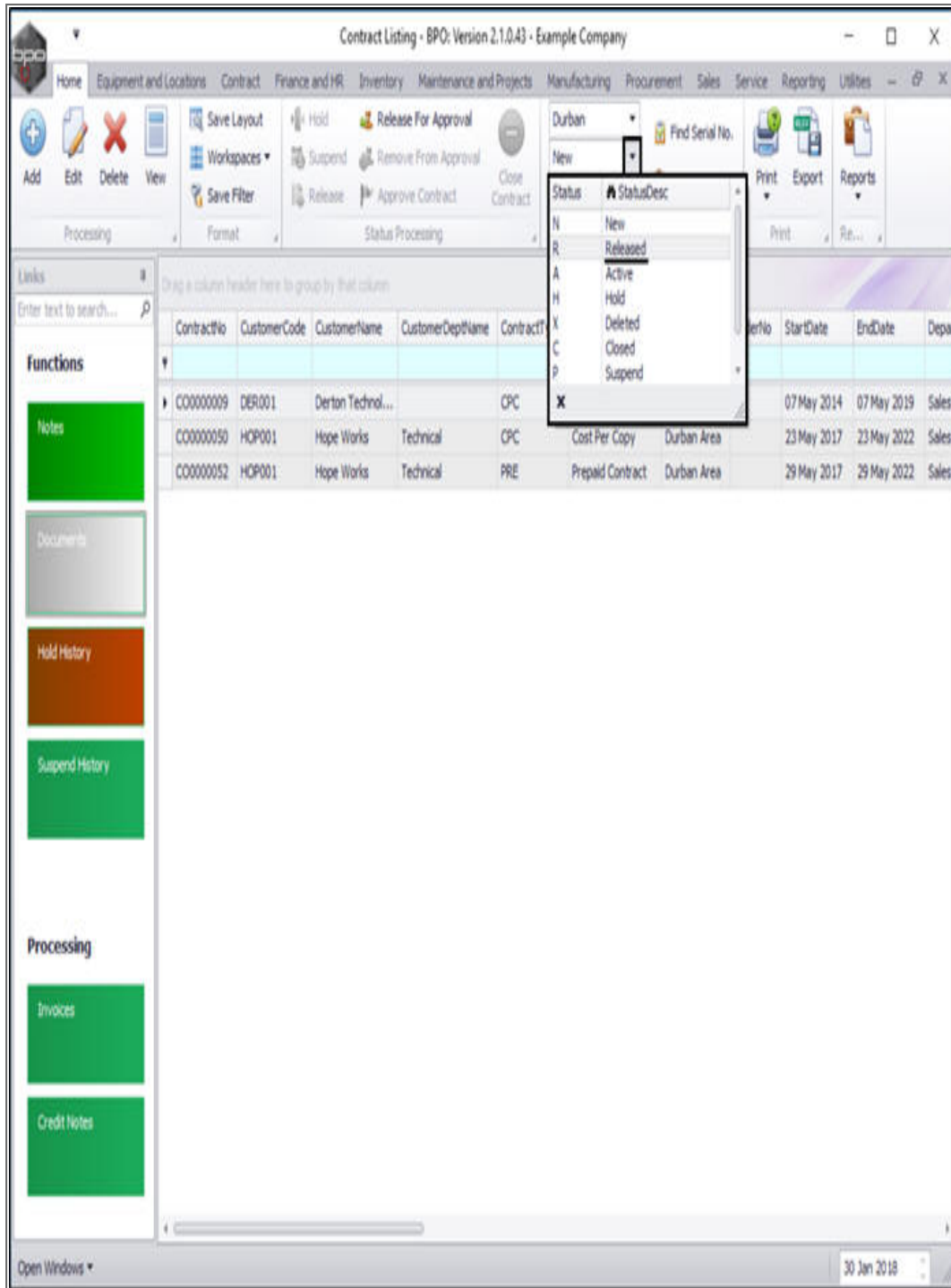


- The contract will now be **removed** from the Contract Listing screen where the status is set to **New**.



VIEW CONTRACT IN RELEASE STATUS

- Select the **Released** status.



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

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 | Released | Find Contract | Print | Export | Reports
 Save Filter | Release | Approve Contract | Close Contract | Refresh

Processing | Format | Status Processing | Current | Print | Pr...

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 | Depar |
|------------|--------------|----------------|------------------|--------------|------------------|------------------|----------|-------------|-------------|-------|
| CO000008 | YES001 | Young Electric | Sales Department | CPC | Cost Per Copy | Forest Hills ... | abc123 | 07 May 2014 | 07 May 2019 | Sales |
| CO000010 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Jolly Farm ... | | 05 Jan 2011 | 07 Jan 2016 | Sales |
| CO000012 | TIA001 | Titan Group | | CPC | Cost Per Copy | South Ridn... | | 16 May 2014 | 16 May 2019 | Sales |
| CO000054 | HOP001 | Hope Works | Technical | CPC | Cost Per Copy | Durban Area | New D... | 01 Jan 2018 | 31 Dec 2022 | Sales |

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 Documents
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 Invoices
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Open Windows | 30 Jan 2018

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