

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

CONTRACT

ADD ITEM INCLUSIONS

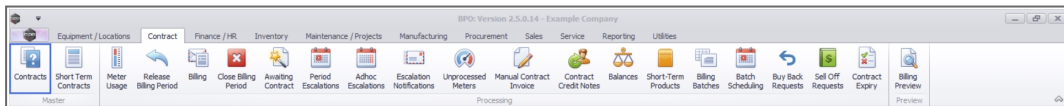
Item Inclusions are items which are included on a contract and should not be billed separately. These items are selected first by category and then by the item within that category.

Examples of Item Inclusion **Category Types** are:

- **Part Inclusion**e.g., toner
- **BOM Inclusion**e.g., machine service BOM
- **Craft Inclusion**e.g., technician
- **Service Inclusion**e.g., call out fee

More than one item inclusion can be added from **each** category type.

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.

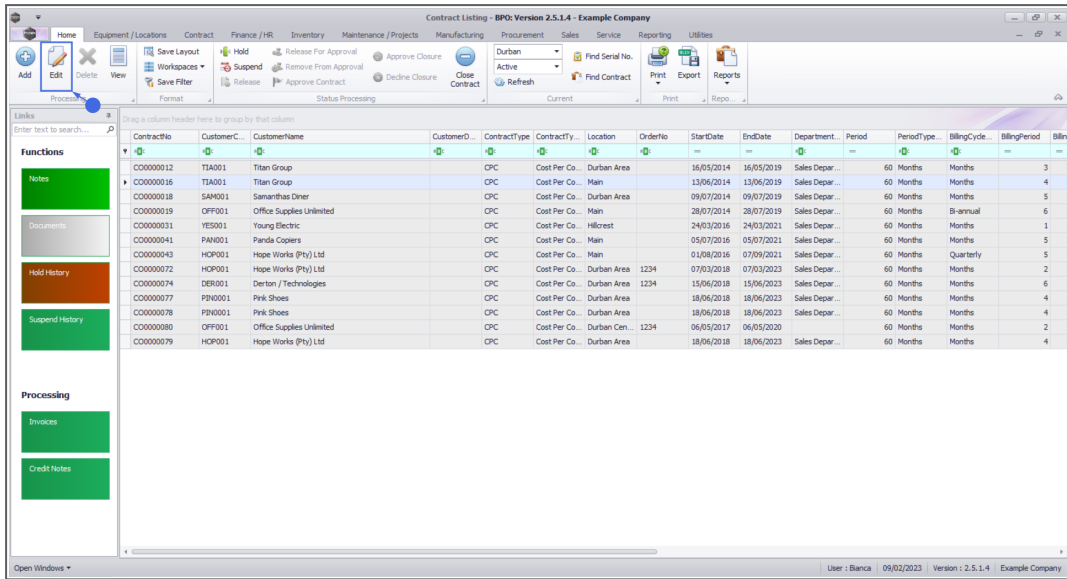
ContractNo	CustomerC	CustomerName	ContractType	ContractYr	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillTo
CO000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60	Months	Months	3	
CO000016	TIA001	Titan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60	Months	Months	4	
CO000018	SAH001	Samarthas Diner	CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60	Months	Months	5	
CO000019	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60	Months	Bi-annual	6	
PC000001	DAH002	Dancing Shoes	PRE	Prepaid Con.	Kloof test		23/03/2016	23/03/2021	Sales Depart...	60	Months	Months	1	
CO000031	YES001	Young Electric	CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Depart...	60	Months	Months	1	
CO000041	PAN001	Panda Copiers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60	Months	Months	5	
CO000042	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		07/09/2016	07/09/2021	Sales Depart...	60	Months	Months	7	
CO000043	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60	Months	Quarterly	5	
CO000052	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60	Months	Months	3	
CO000054	APP001	Apple Juice Inc	CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60	Months	Months	0	
CO000072	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60	Months	Months	2	
CO000073	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60	Months	Months	0	
CO000074	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60	Months	Months	6	
CO000077	PSH001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000078	PSH001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000080	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Durban Cen.	1234	06/05/2017	06/05/2020	Sales Depart...	60	Months	Months	2	
CO000082	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60	Months	Months	7	
CO000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000083	WES001	Westwood Dynamic	CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60	Months	Months	4	

SELECT THE CONTRACT

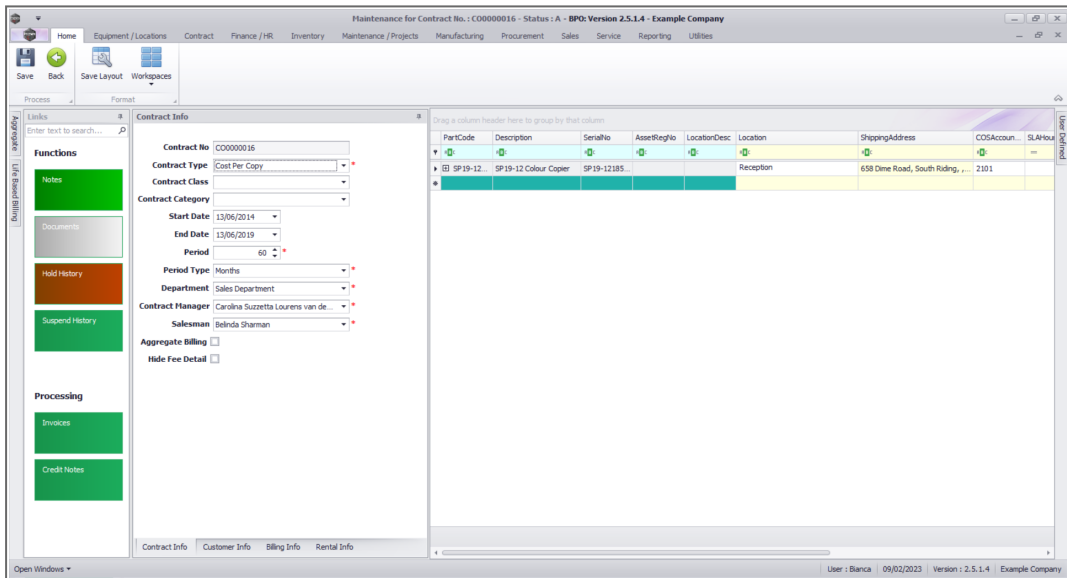
- Select the **row** of the **contract** that you wish to process.

ContractNo	CustomerC	CustomerName	ContractType	ContractYr	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillTo
CO000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60	Months	Months	3	
CO000016	TIA001	Titan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60	Months	Months	4	
CO000018	SAH001	Samarthas Diner	CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60	Months	Months	5	
CO000019	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60	Months	Bi-annual	6	
PC000001	DAH002	Dancing Shoes	PRE	Prepaid Con.	Kloof test		23/03/2016	23/03/2021	Sales Depart...	60	Months	Months	1	
CO000031	YES001	Young Electric	CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Depart...	60	Months	Months	1	
CO000041	PAN001	Panda Copiers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60	Months	Months	5	
CO000042	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		07/09/2016	07/09/2021	Sales Depart...	60	Months	Months	7	
CO000043	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60	Months	Quarterly	5	
CO000052	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60	Months	Months	3	
CO000054	APP001	Apple Juice Inc	CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60	Months	Months	0	
CO000072	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60	Months	Months	2	
CO000073	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60	Months	Months	0	
CO000074	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60	Months	Months	6	
CO000077	PSH001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000078	PSH001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
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CO000082	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60	Months	Months	7	
CO000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000083	WES001	Westwood Dynamic	CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60	Months	Months	4	

- Click on the **Edit** button.

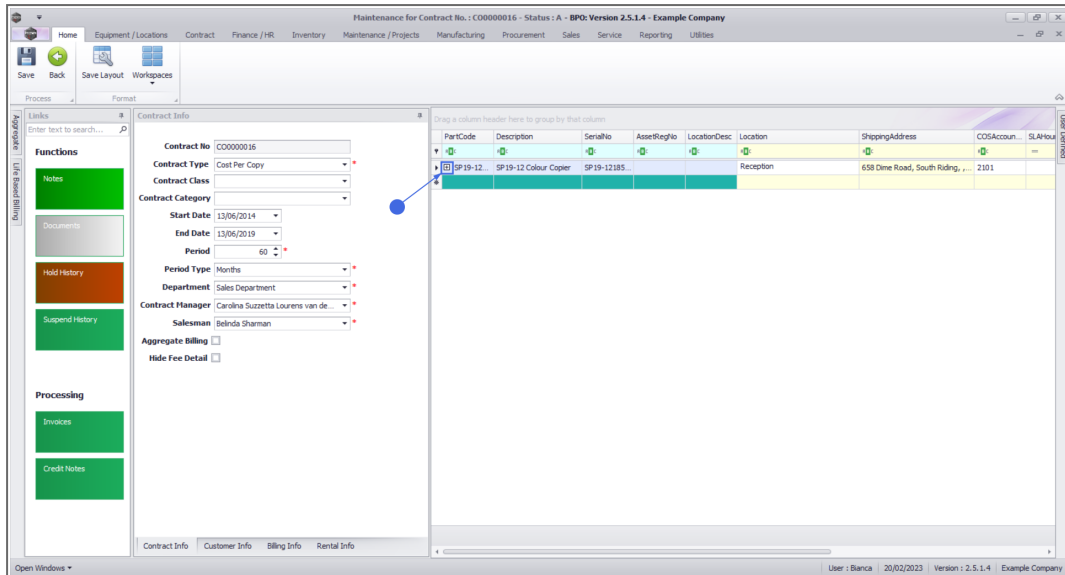


The **Contract Maintenance** screen will be displayed.



SELECT THE ITEM

- Click on the row of the contract item you wish to work with.

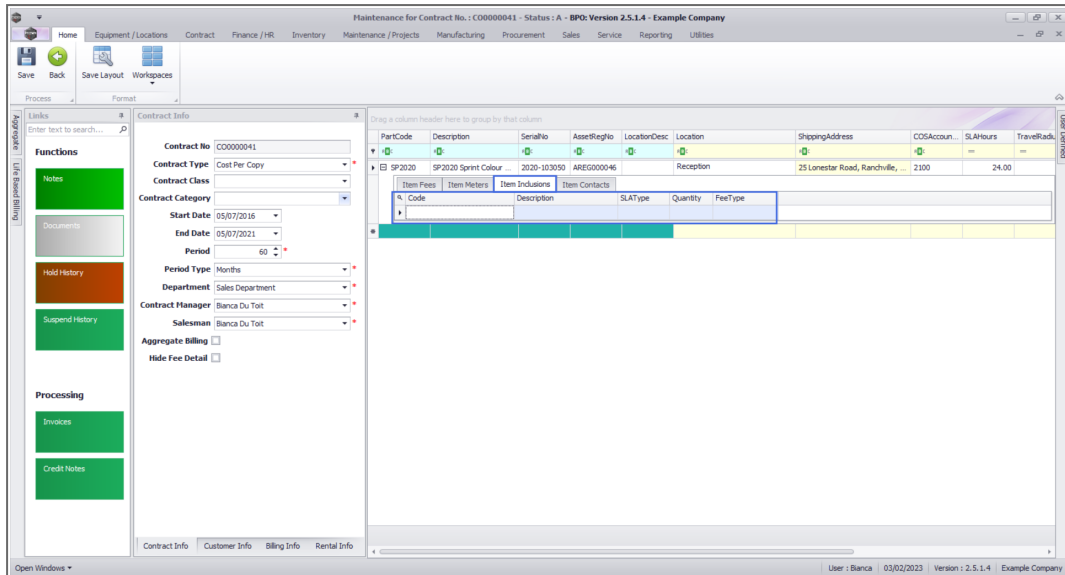


Item Inclusions Frame

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

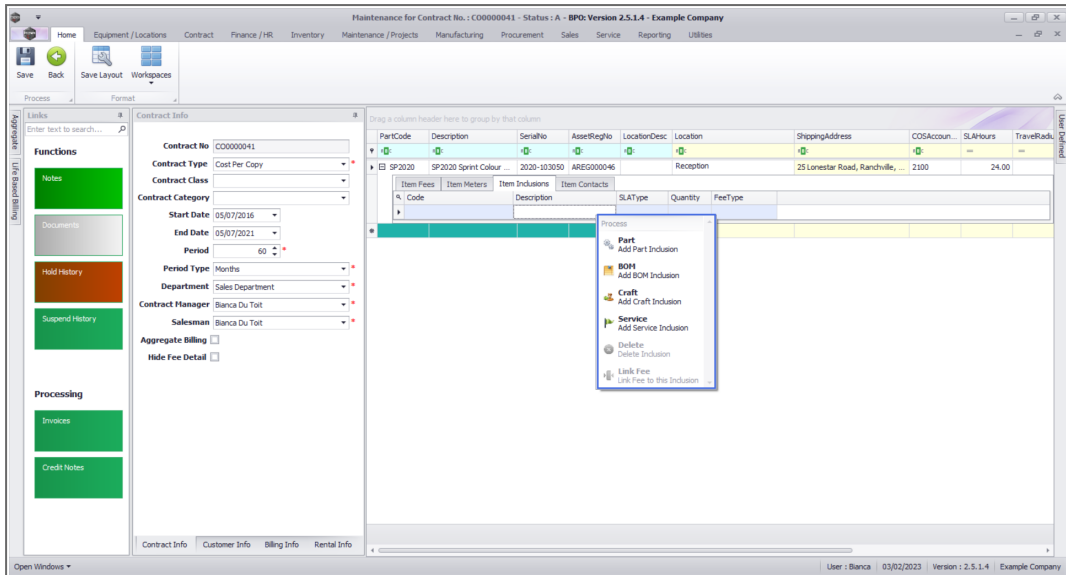
The **Item Inclusions** frame will be expanded.

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



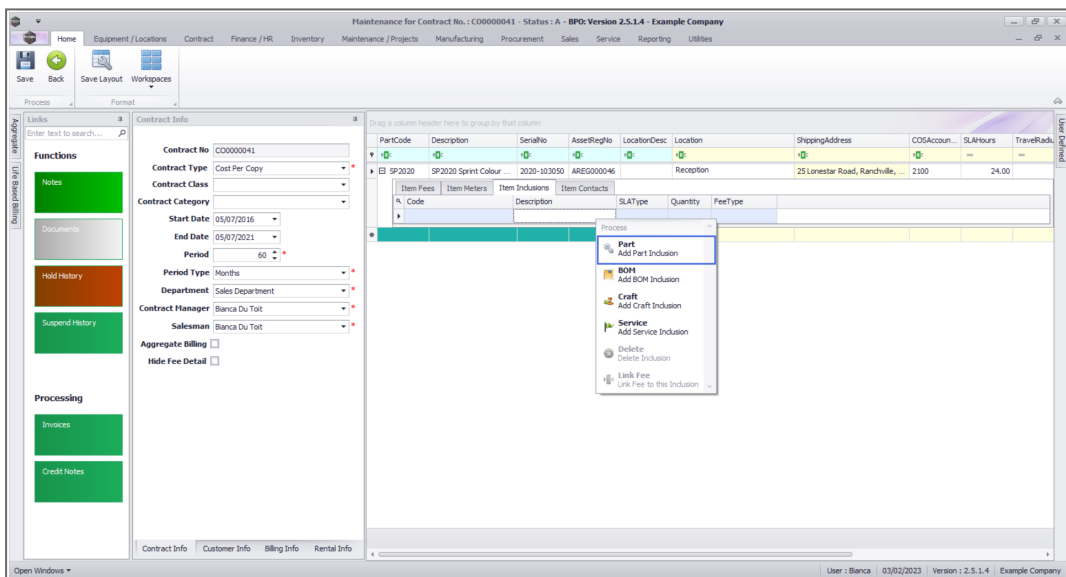
Add Item Inclusions

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

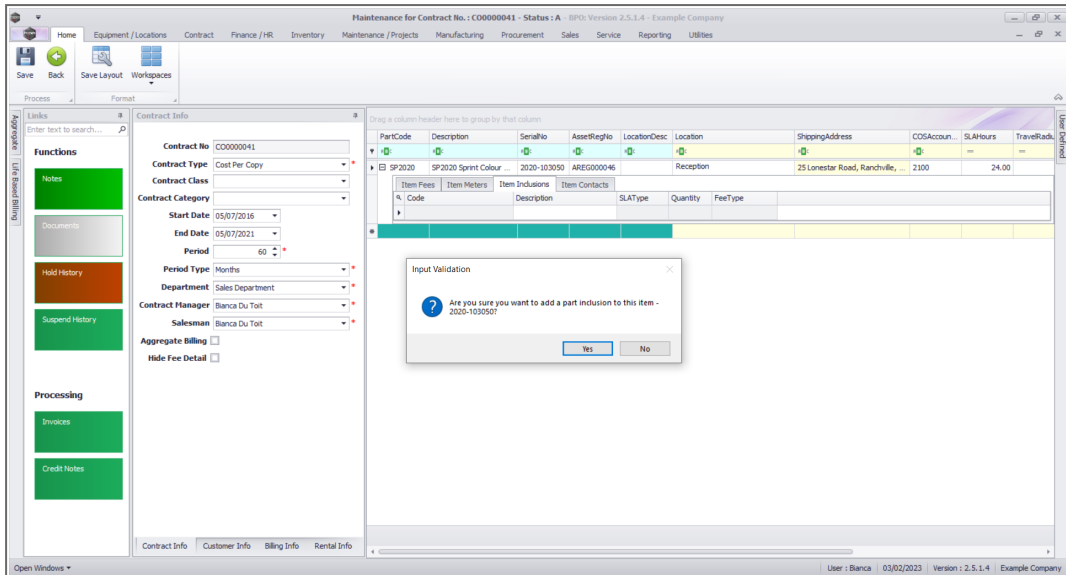


Add Part Inclusion

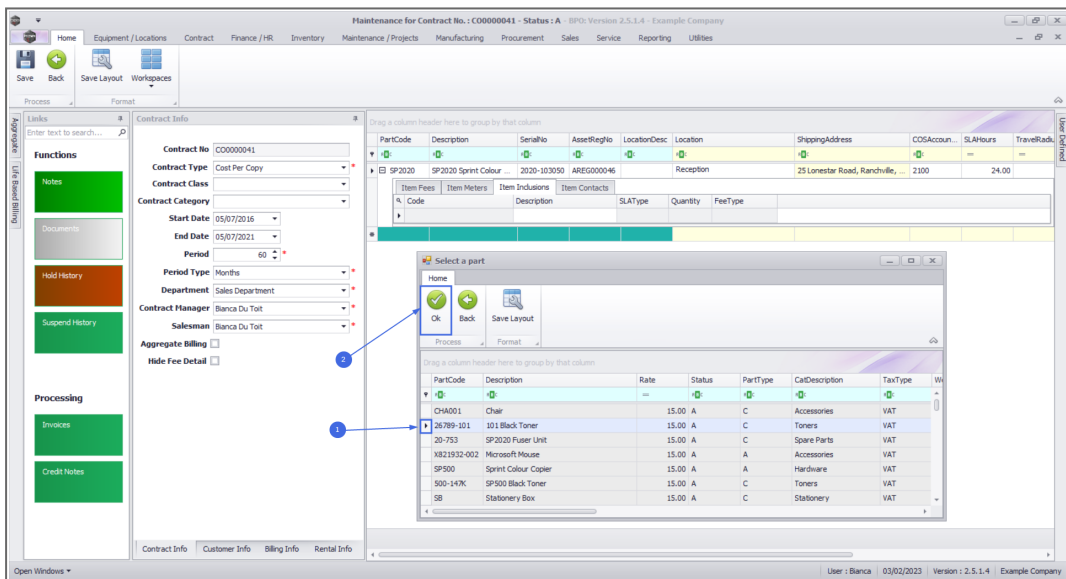
- Click on **Part** - Add Part Inclusion.



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

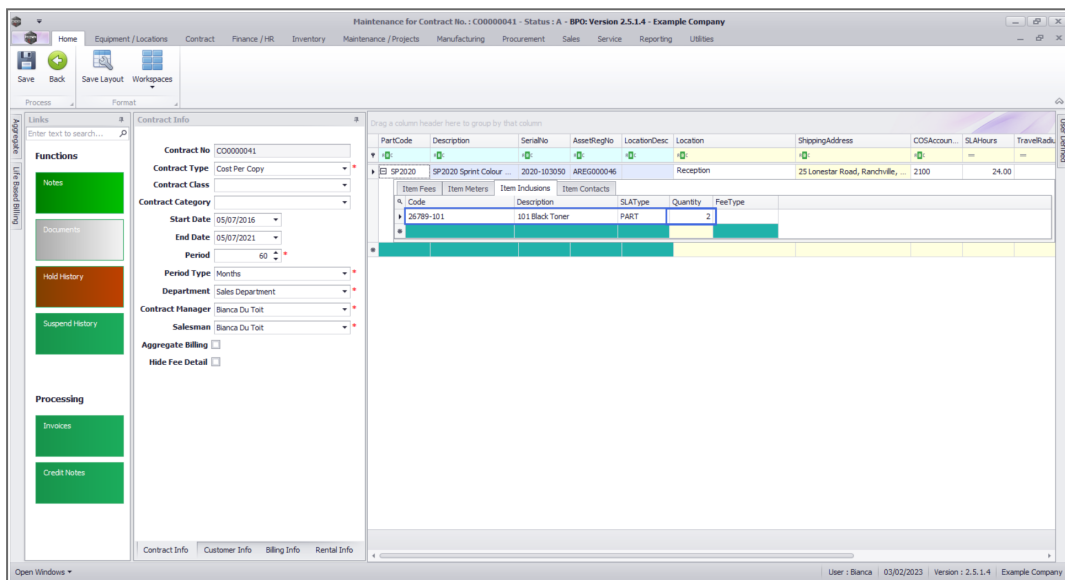


- A **Select a part** screen will pop up.
- Click on the **row selector** in front of the **part** you wish to **add** to this .png as an **inclusion**
- Click on **Ok**.



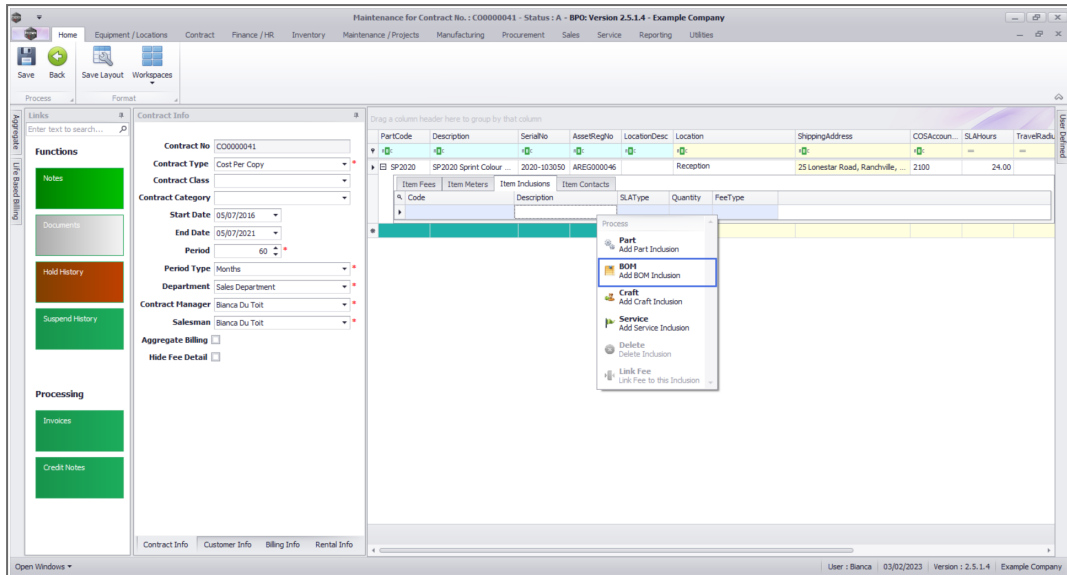
- The selected part will be **added** to the **Item Inclusion** frame.

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

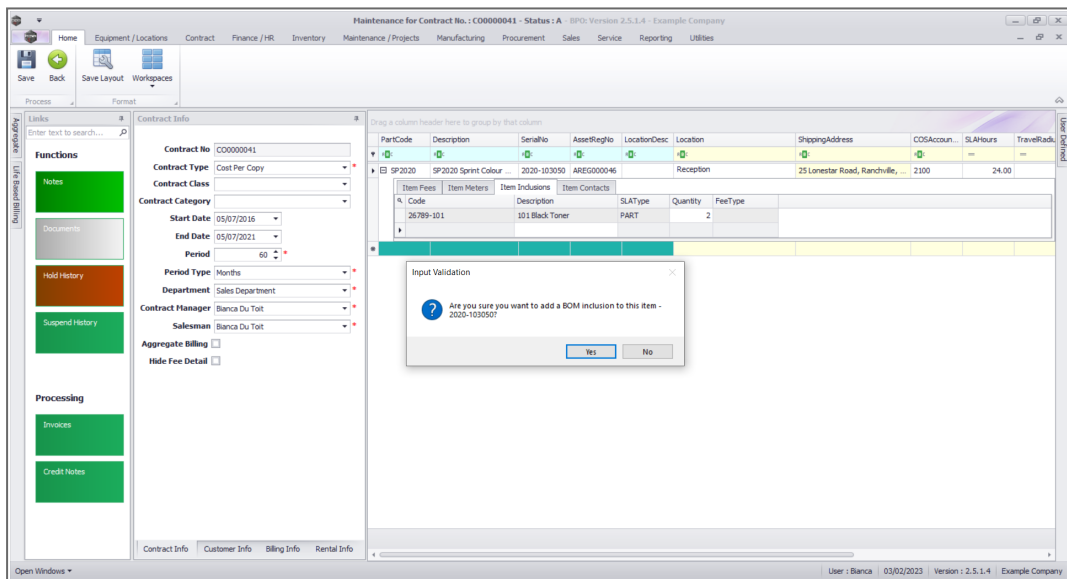


Add Bill of Materials Inclusion

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



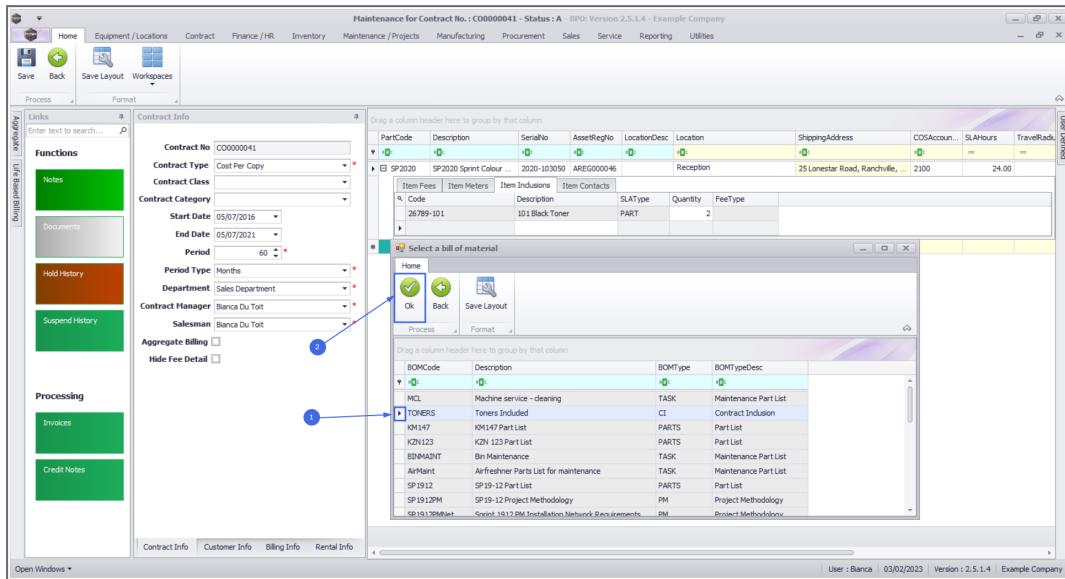
- An **Input Validation** message box will pop up asking:
 - Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??
- Click on **Yes**.



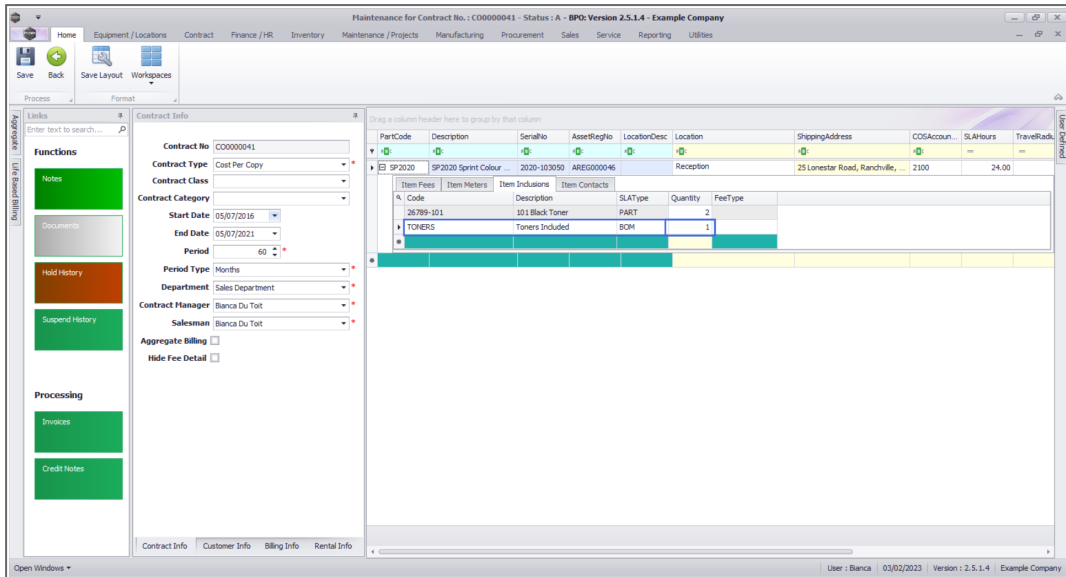
- A **Select a bill of material** screen will pop up.
- Click on the **row selector** in front of the **BOM** you wish to **add** to

this .png as an **inclusion**.

- Click on **Ok**.

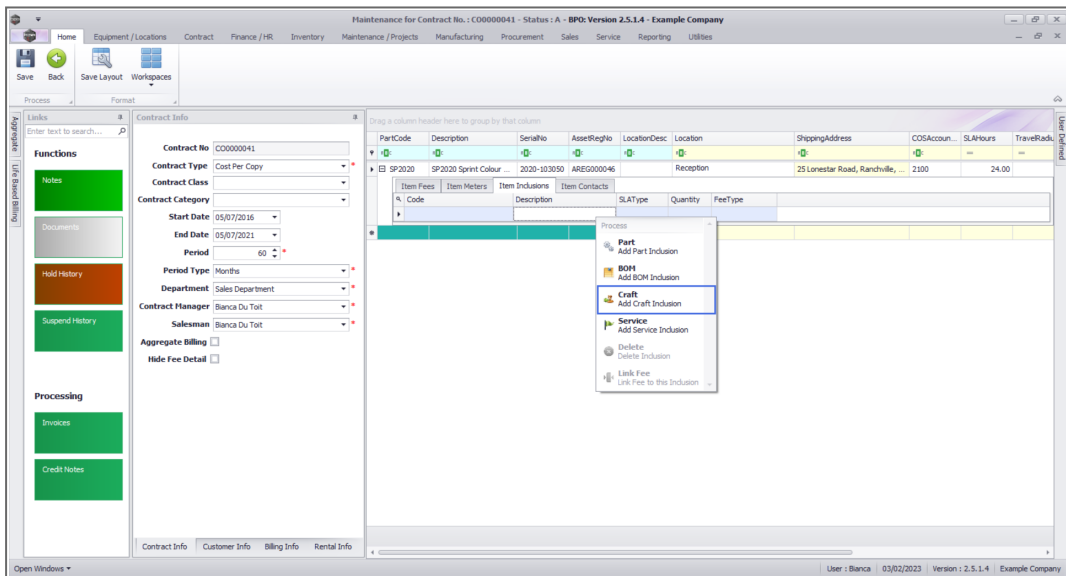


- The selected **BOM** will be added to the **Item Inclusions** frame.
- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type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

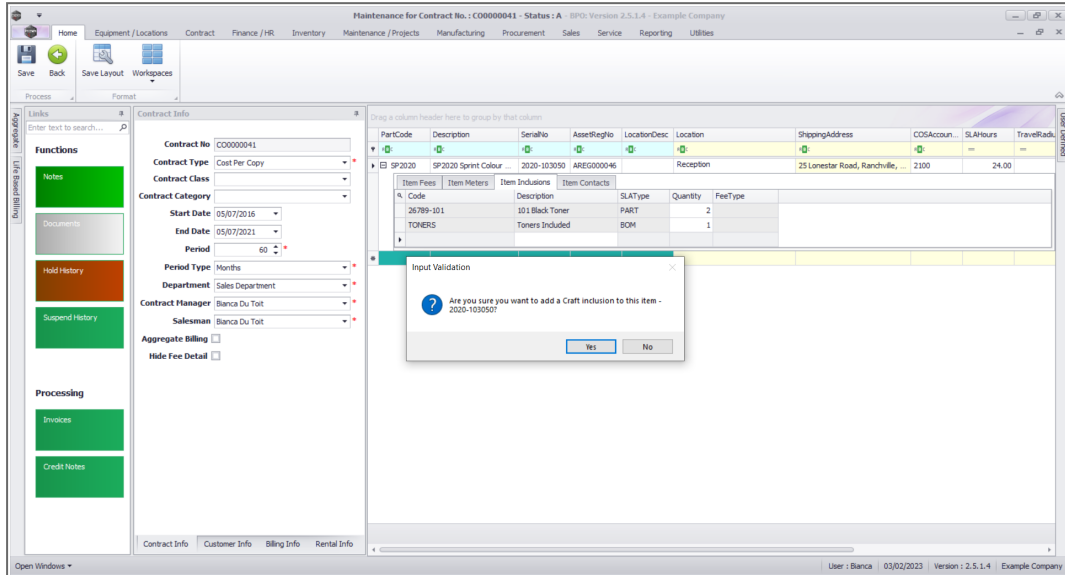


Add Craft Inclusion

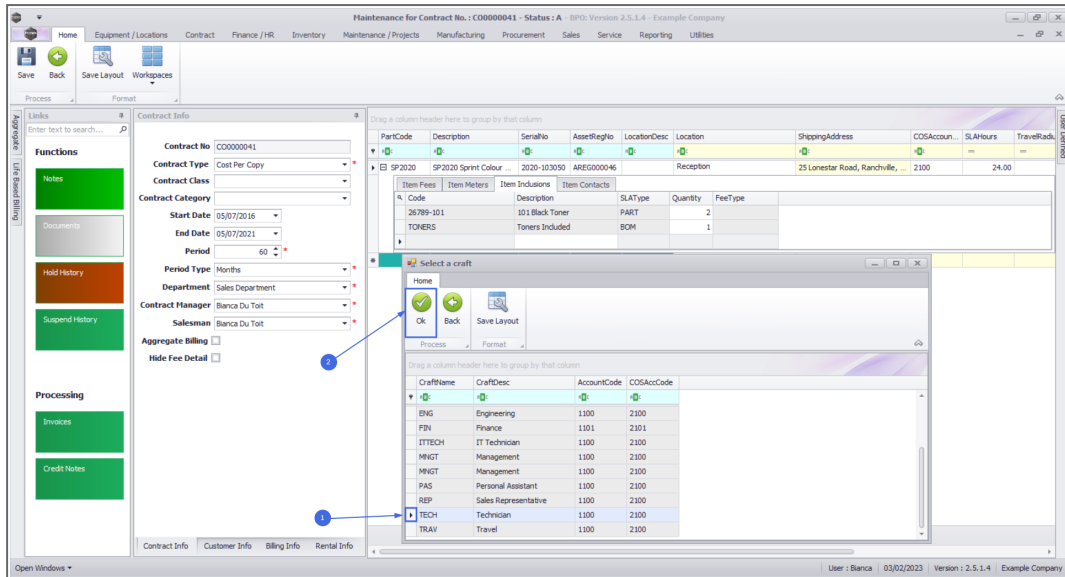
- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** - Add Craft Inclusion.



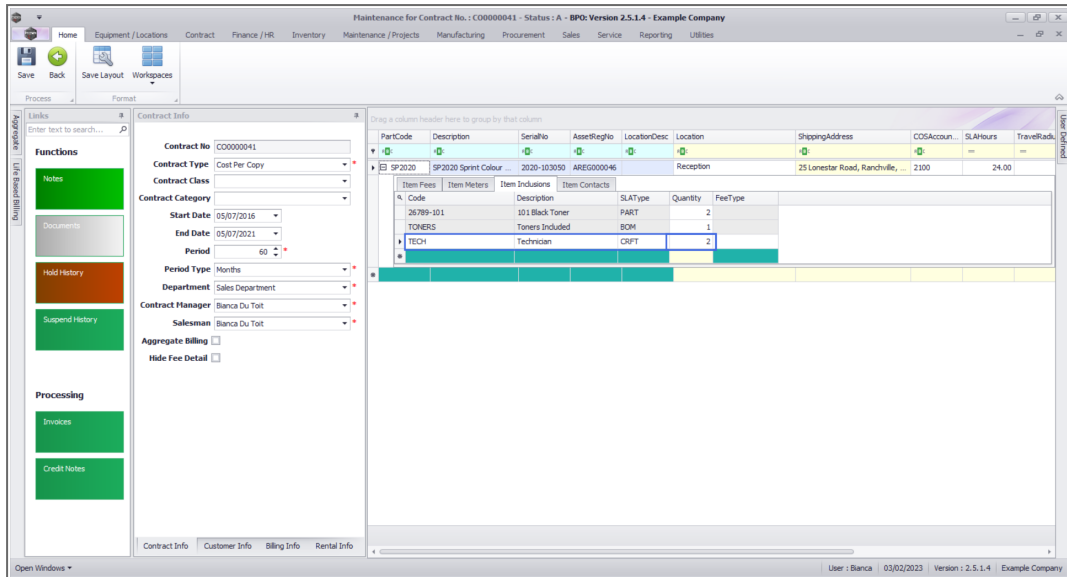
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Craft inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



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

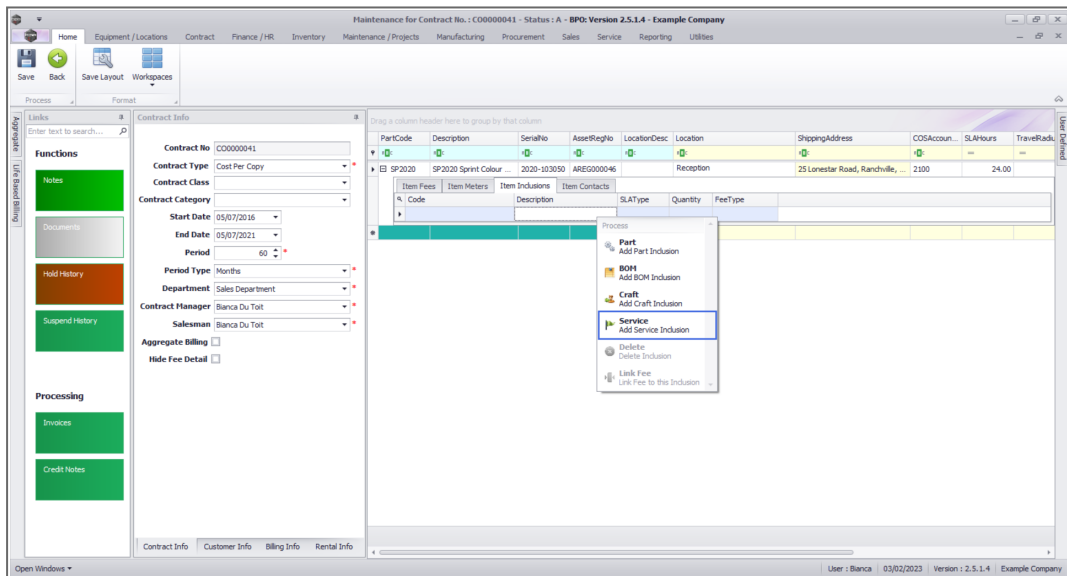


- The selected **Craft** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the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

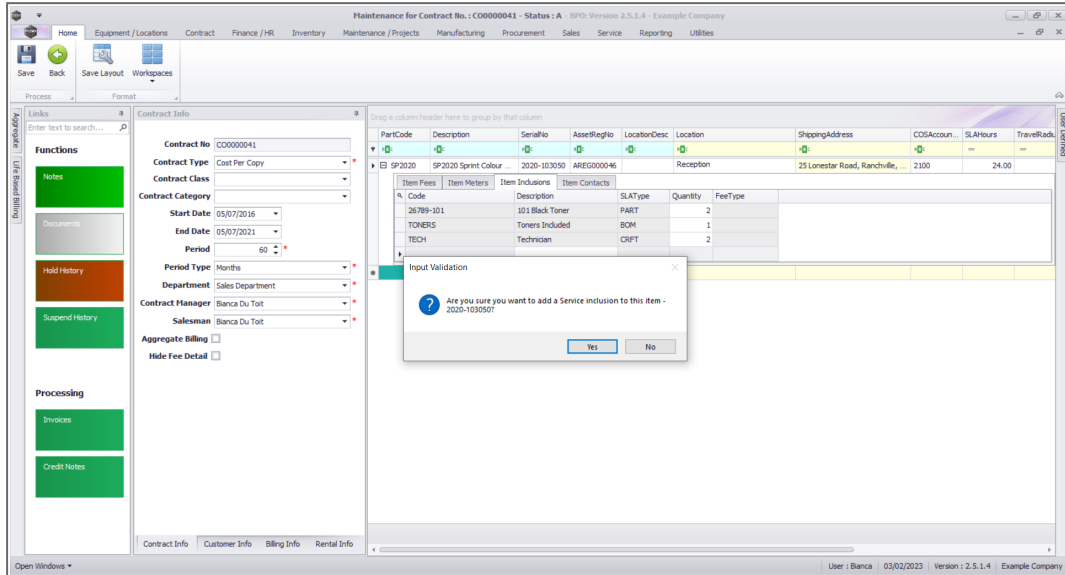


Add Service Inclusion

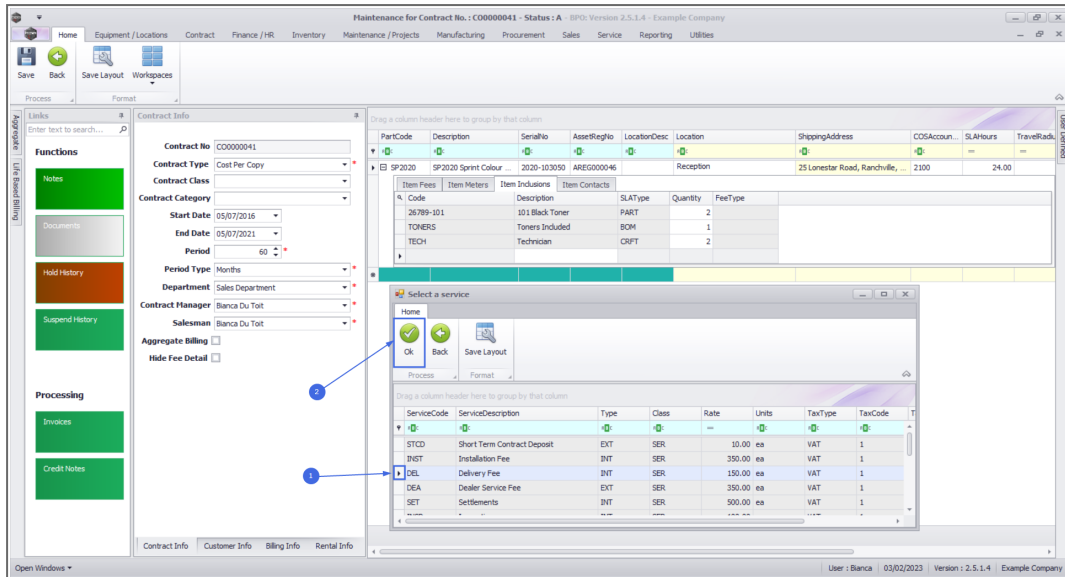
- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **Service** - Add Service Inclusion.



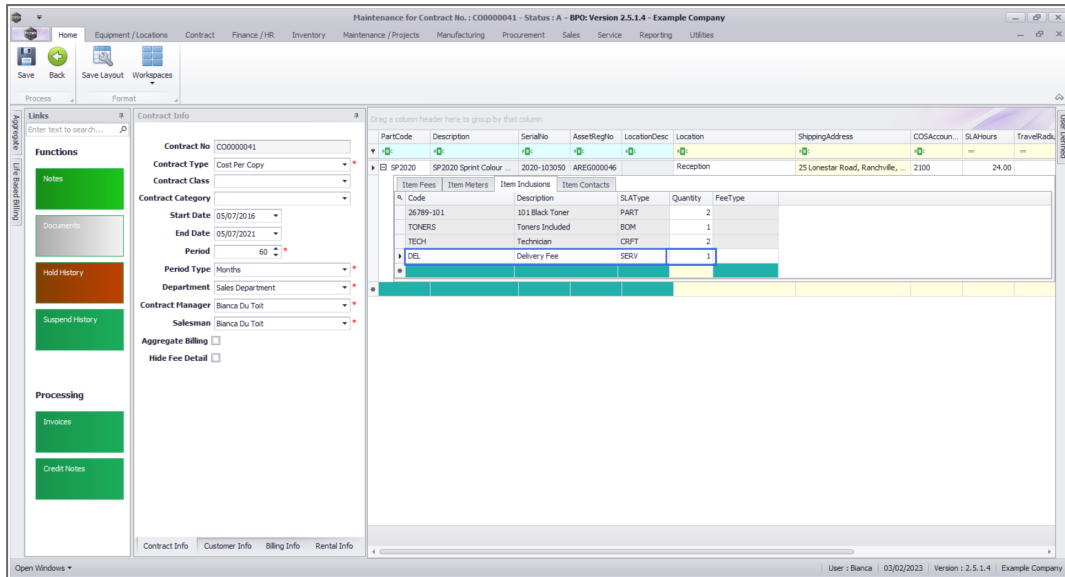
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Service inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



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



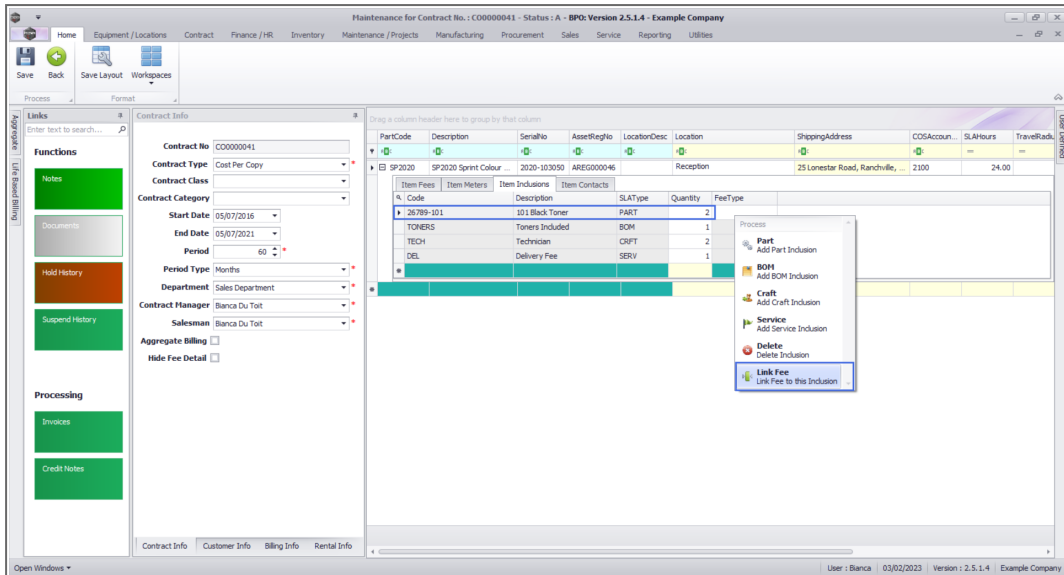
- The selected **Service** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the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



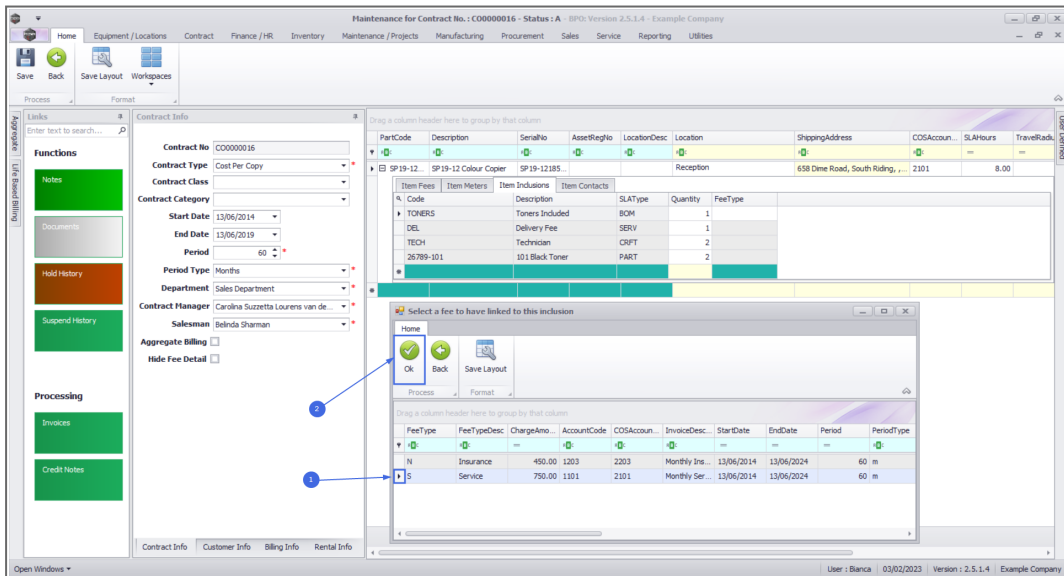
- **Note:** You can add more than one of each type of item inclusion to the .png.

Link a Fee to an Inclusion

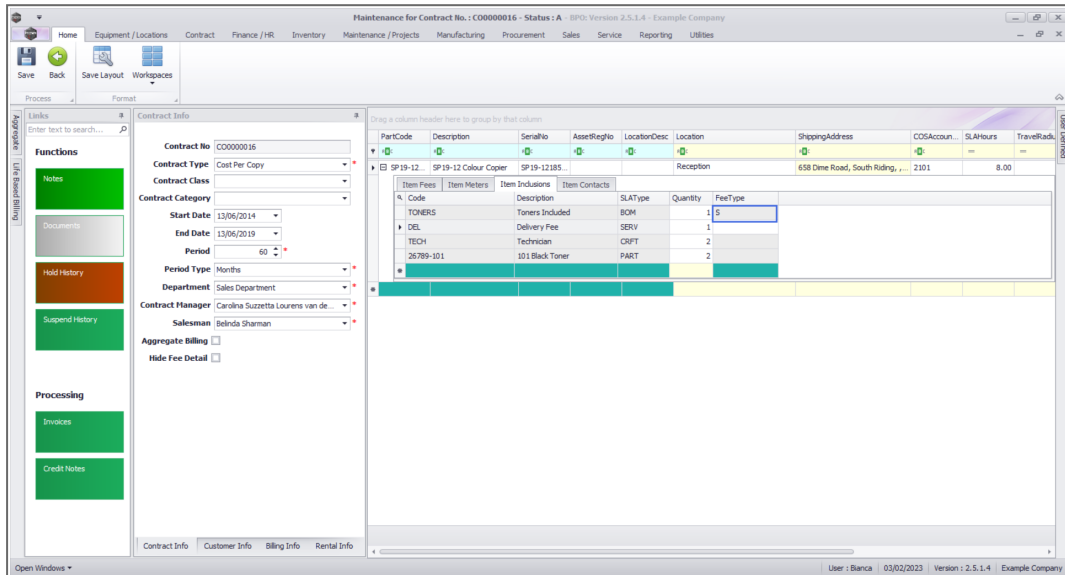
- **Right click** in the **row** of the **item inclusion** that you wish to **link a fee** to.
 - In this image **IT Technician** has been selected.
- The **Process** menu will pop up.
- Click on **Link Fee** - Link Fee to this Inclusion.



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



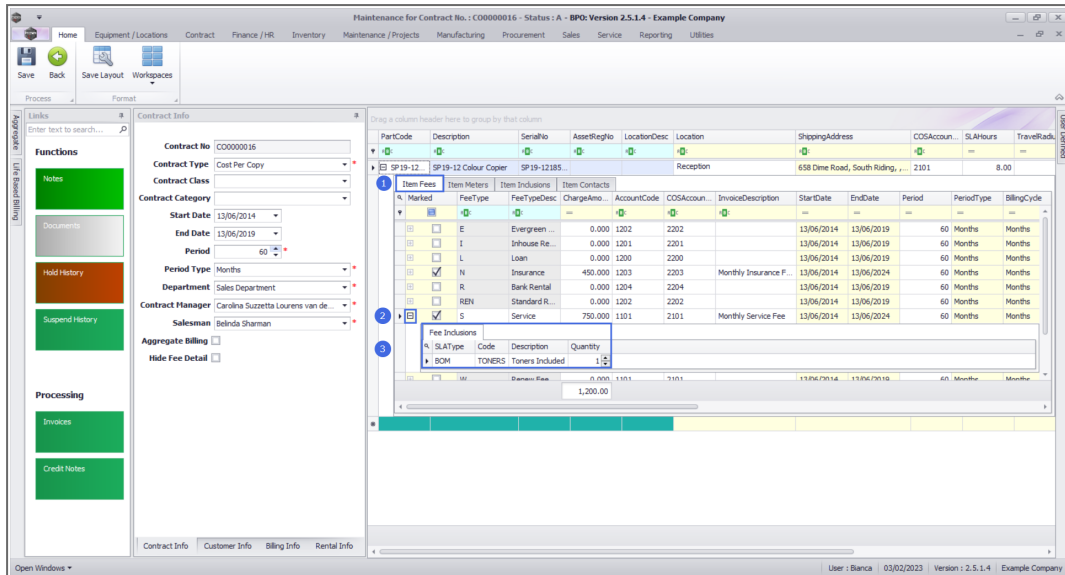
- The **The Fee Type** field will be populated with the selected fee type.
- In this image, **S** - Service was selected, since the selected inclusion is covered by the Service Fee, in this example.



View the linked Inclusion on the Fee Detail

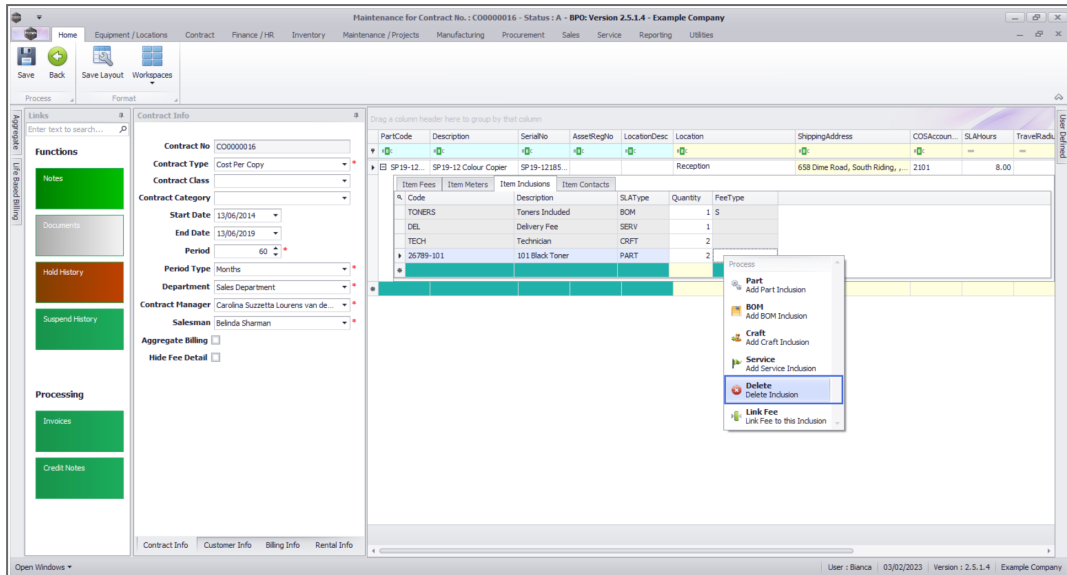
Note: that for this step you will need to save the .png first and then come back to view the Fee's linked Inclusion.

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

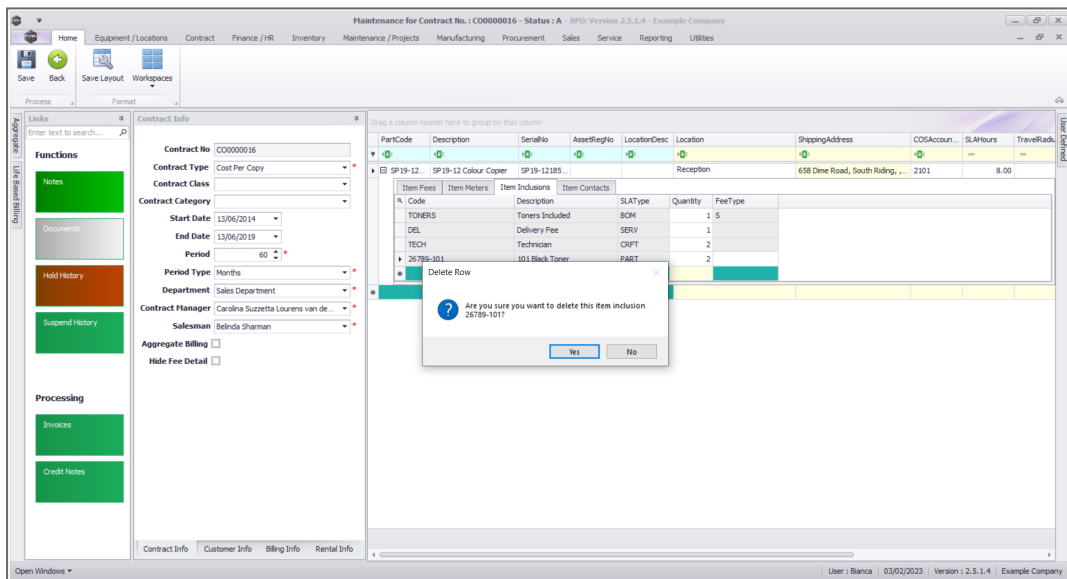


Delete Inclusion

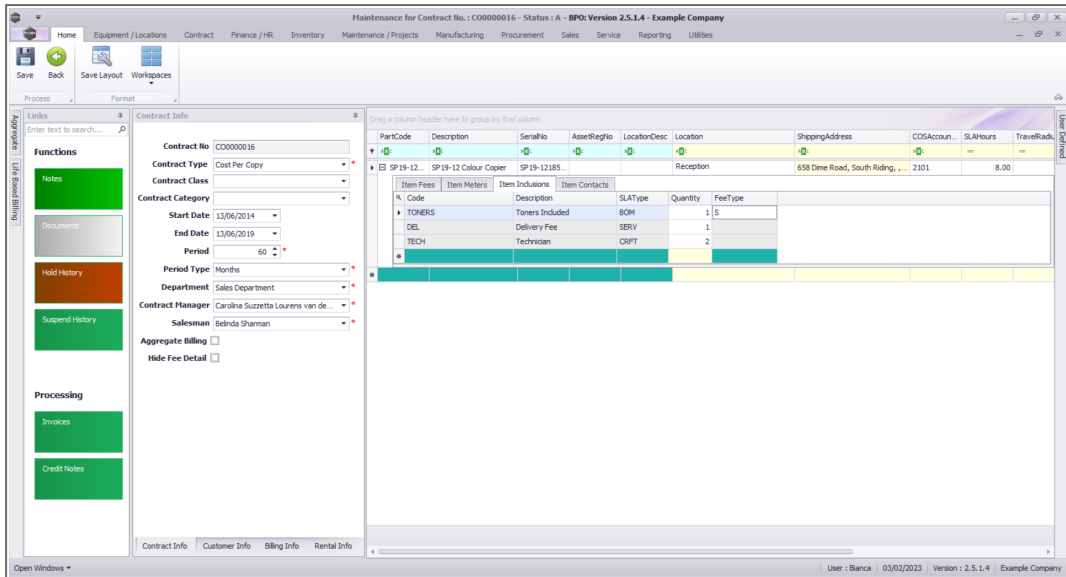
- Another option in the **Item Inclusions Process** menu is **Delete Inclusion**.
- **Right click** in the **row** of the **item inclusion** that you wish to **delete** from the .png.
 - In this image **INST** - Installation Fee has been selected.
- The **Process** menu will pop up.
- Click on **Delete**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



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



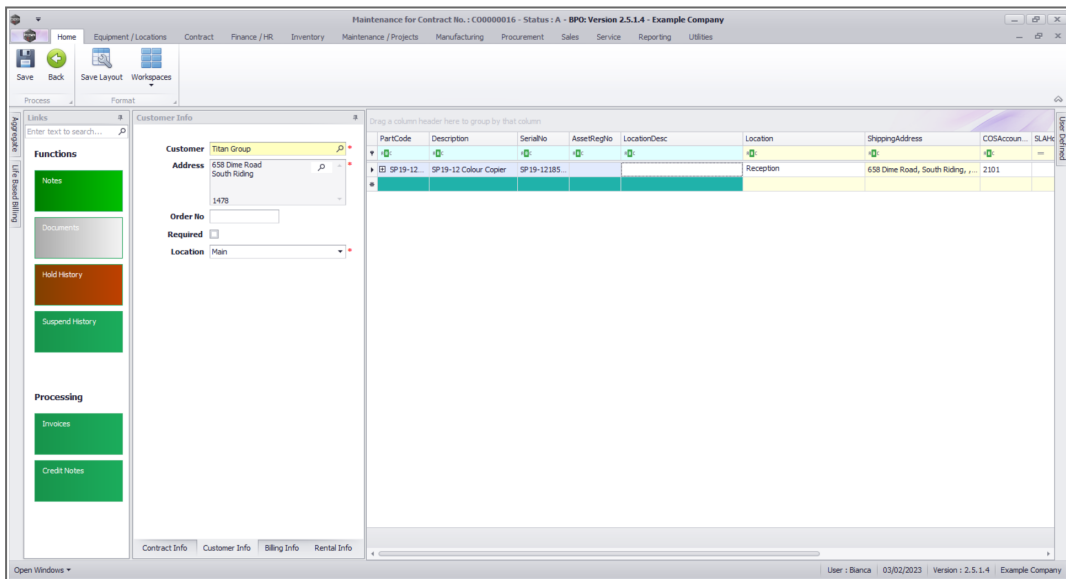
- The selected item will now be **removed** from the **Item Inclusions** frame.



SAVE ITEM INCLUSIONS

SAVE THE CONTRACT

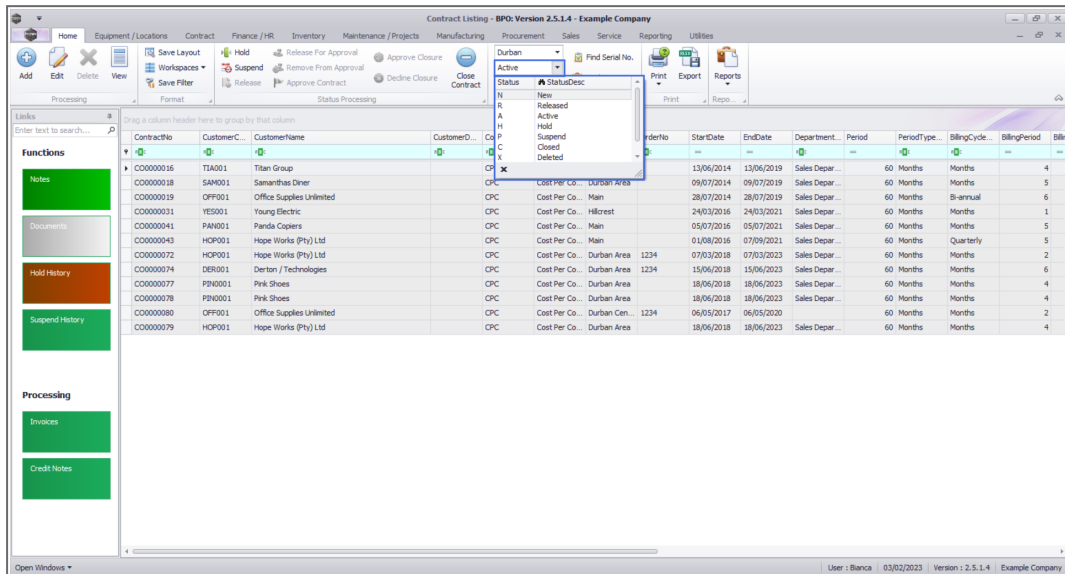
- When you are done, click on **Save**.



- 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.



- **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.

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	DepartmentName	Period
C00000254	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Pretoria 1		09/12/2019	09/12/2024	Sales Department	60

MNU.112.027