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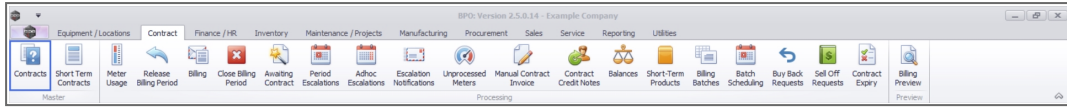
CONTRACT

EDIT CONTRACT ITEM

A contract **item** can be edited when the contract is in the **Active** state.

Certain amendments made to the contract item, will trigger the contract to be moved back to the Released state, in order for the contract to be checked and re-Approved. An email will then be sent to all users who have the rights to authorise this contract.

These are the changes involved that will trigger the re-Approval process:

- If any contract **Item** is added or removed
- If any contract **Item Fee** is added or removed
- If the **Billing Customer** on an Item Fee or Item Meter is changed.
- If any of the following details are changed on contract **Item Fees**:
  - Amount
  - Start Date
  - End Date
  - Escalation %
  - Account Code
  - COS Account Code
  - Invoice Description
  - Billing Period
  - Billing Cycle
  - Finance Party
  - Finance Amount

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.

SELECT THE CONTRACT

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

- Click on the **Edit** button.

The **Contract Maintenance** screen will be displayed.
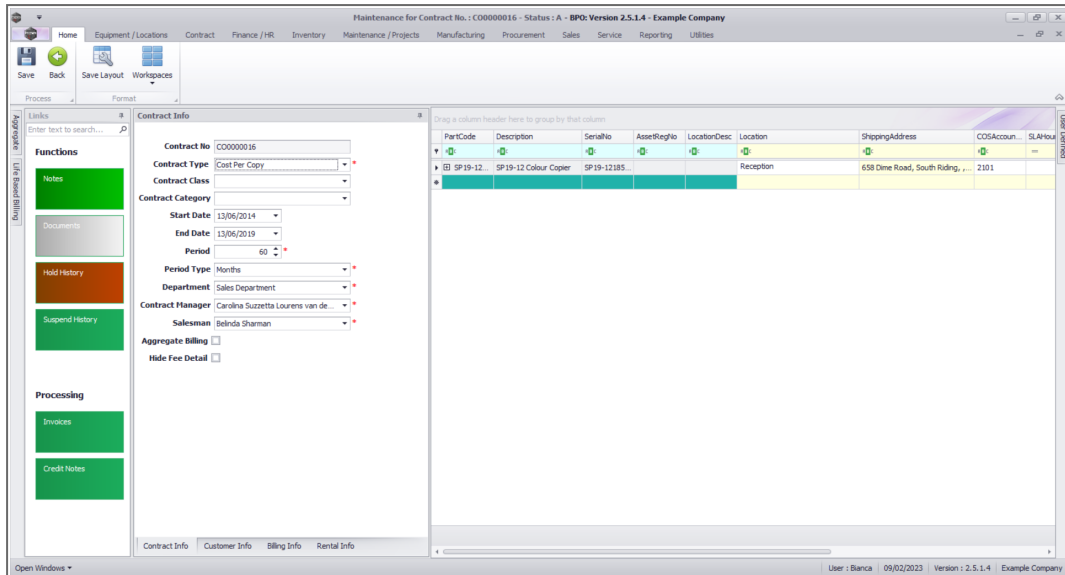
EDIT ITEM DETAILS

- Here you can make changes to the following contract **item** details:

  - Location
  - Shipping Address
  - COS Account Code
  - SLA Hours
  - Travel Charge
  - Is Extra

- To make a change to any of these details, click in the relevant **field** of the selected item.

EDIT LOCATION

- In this example, we have clicked in the **Location** field of the second contract item in the list.
  - The original location is **Reception**.

- Type in the **new** location.
  - In this example, **Second Floor** has been typed in.

EDIT TRAVEL RADIUS

- **Note:** This should be **0** if travel is <u>included</u> in the contract)

- In this example, we have clicked in the **Travel Radius** field of the first machine in the list.
  - The Travel Radius is currently **0**.

- Either **type in** or use the **arrow indicators** to select the updated travel radius for this contract item (in kilometres).
  - In this example, the Travel Radius has been changed to **42**.

SAVE ITEM CHANGES

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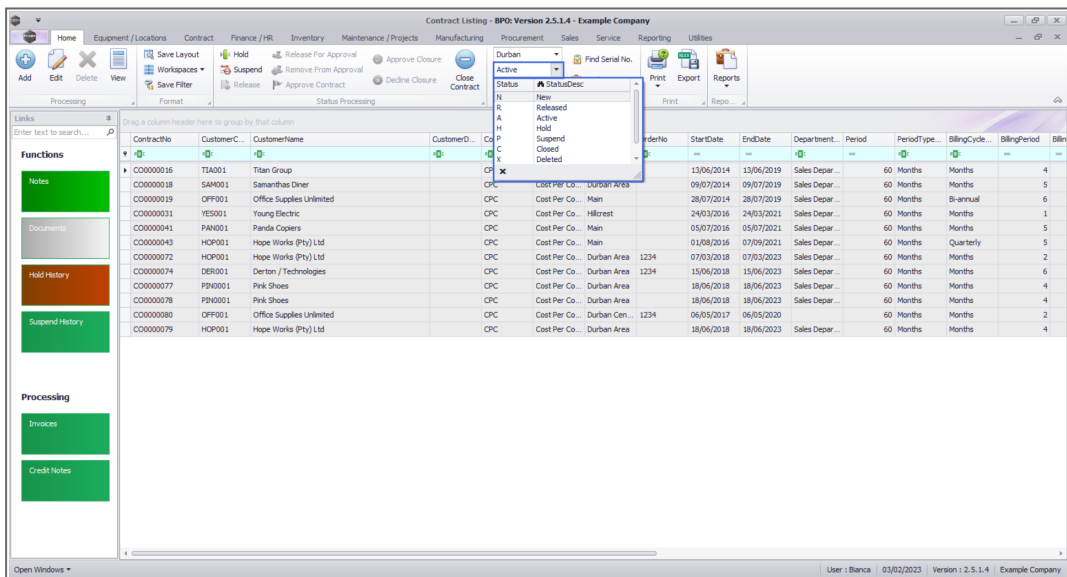
- When you are done, click on **Save**.
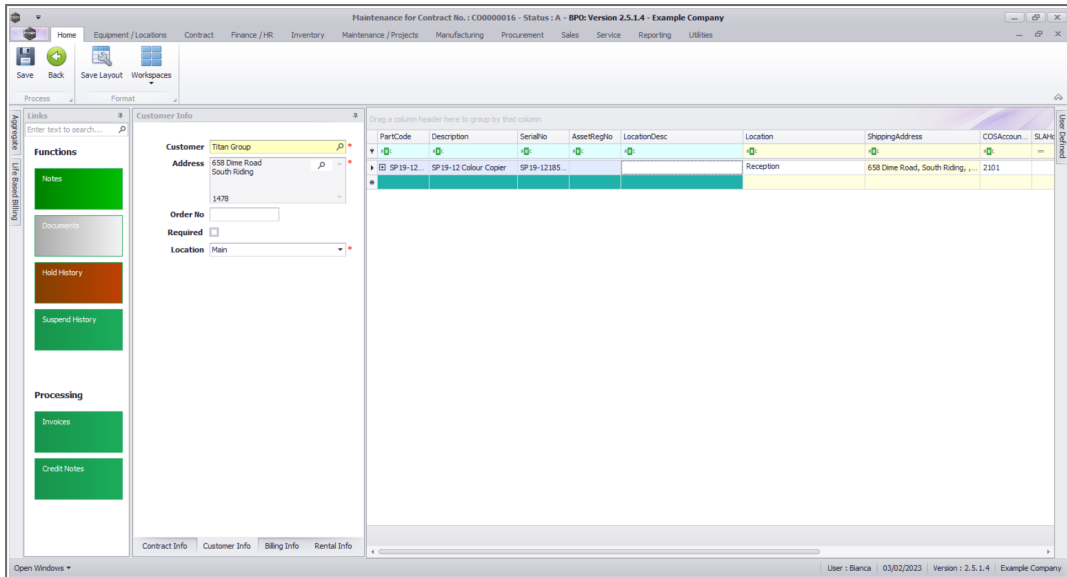
- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.

- **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.
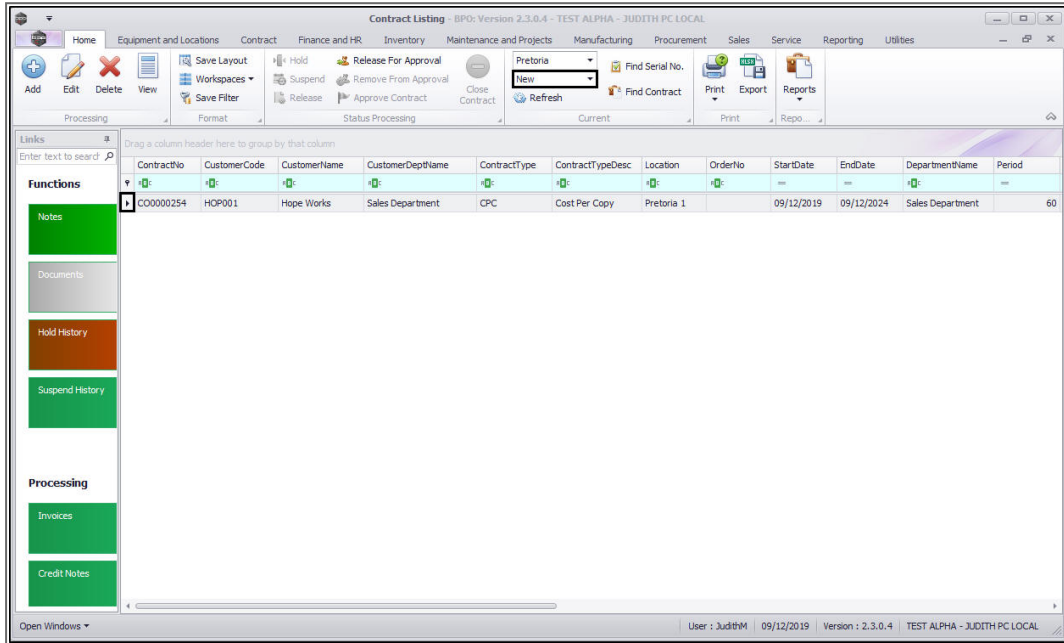
NOTE ON CONTRACT TRIGGERS

- Note: If the item detail that was changed, was one of the triggers that would move the contract back into the Released status, then you will need to change the Contract Listing screen status to Released to be able to view the updated contract item details.

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