

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

## CONTRACT

### EDIT ITEM METER CHARGES

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

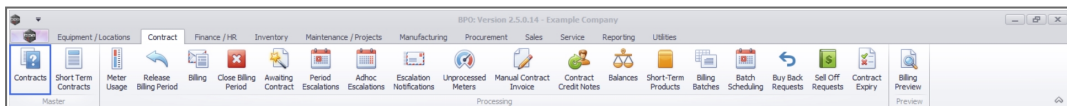
Certain amendments made to the contract **item meter**, will trigger the contract to be moved back to the **Released** state, in order for the contract to be checked and re-**Approved**. An email will then be sent to all users who have the rights to authorise this contract.

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

- If the **Billing Customer** on an Item Fee or Item **Meter** is changed.

Other changes made to the meters to a contract, will **not** trigger the re-approval process.

#### 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.

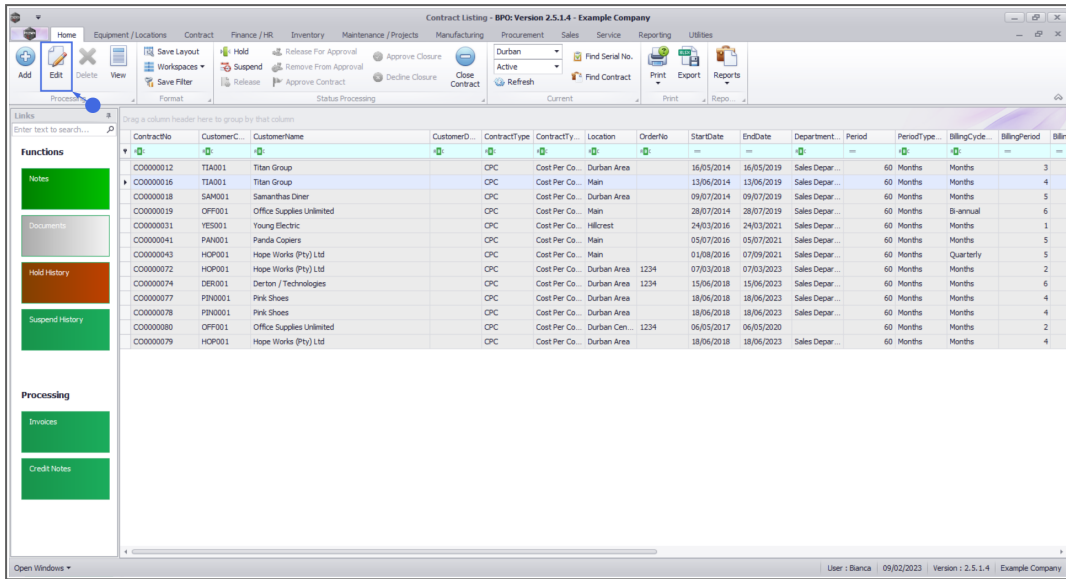
| ContractNo | CustomerC | CustomerName              | ContractType | ContractY    | Location    | OrderNo | StarDate   | EndDate    | Department      | Period | PeriodType | BillingCycle | BillingPeriod | Bill |
|------------|-----------|---------------------------|--------------|--------------|-------------|---------|------------|------------|-----------------|--------|------------|--------------|---------------|------|
| 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       | 8             |      |

## SELECT THE CONTRACT

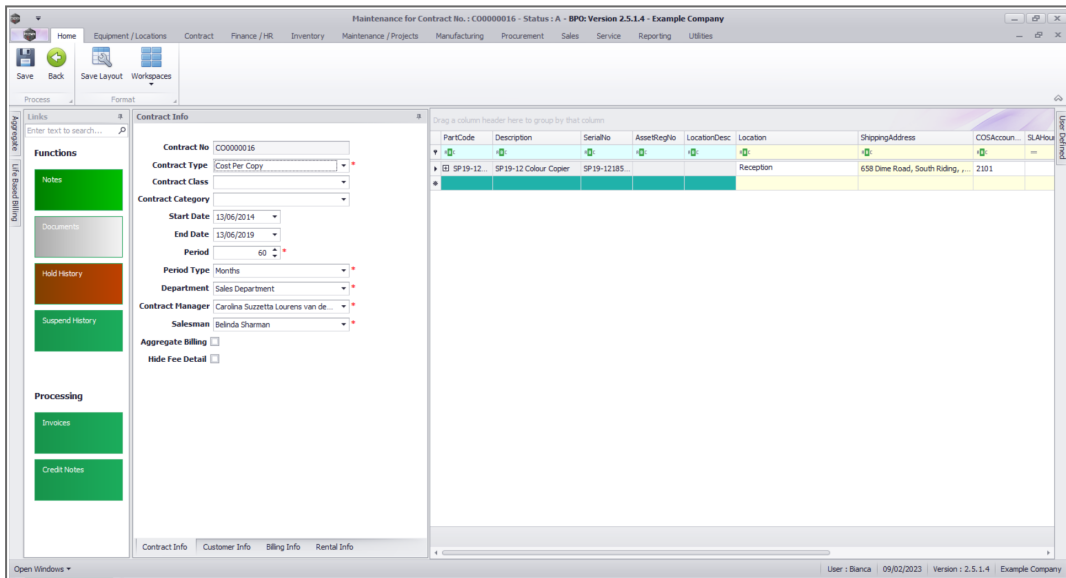
- Select the **row** of the **contract** that you wish to process.

| ContractNo | CustomerC | CustomerName              | ContractType | ContractY    | Location    | OrderNo | StarDate   | EndDate    | Department      | Period | PeriodType | BillingCycle | BillingPeriod | Bill |
|------------|-----------|---------------------------|--------------|--------------|-------------|---------|------------|------------|-----------------|--------|------------|--------------|---------------|------|
| 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             |      |
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| 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       | 8             |      |

- Click on the **Edit** button.



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



## SELECT THE ITEM

- Click on the **expand** button in the **row** of the **item** where you wish to edit the **Meter charge**.

Maintenance for Contract No. : CO000043 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

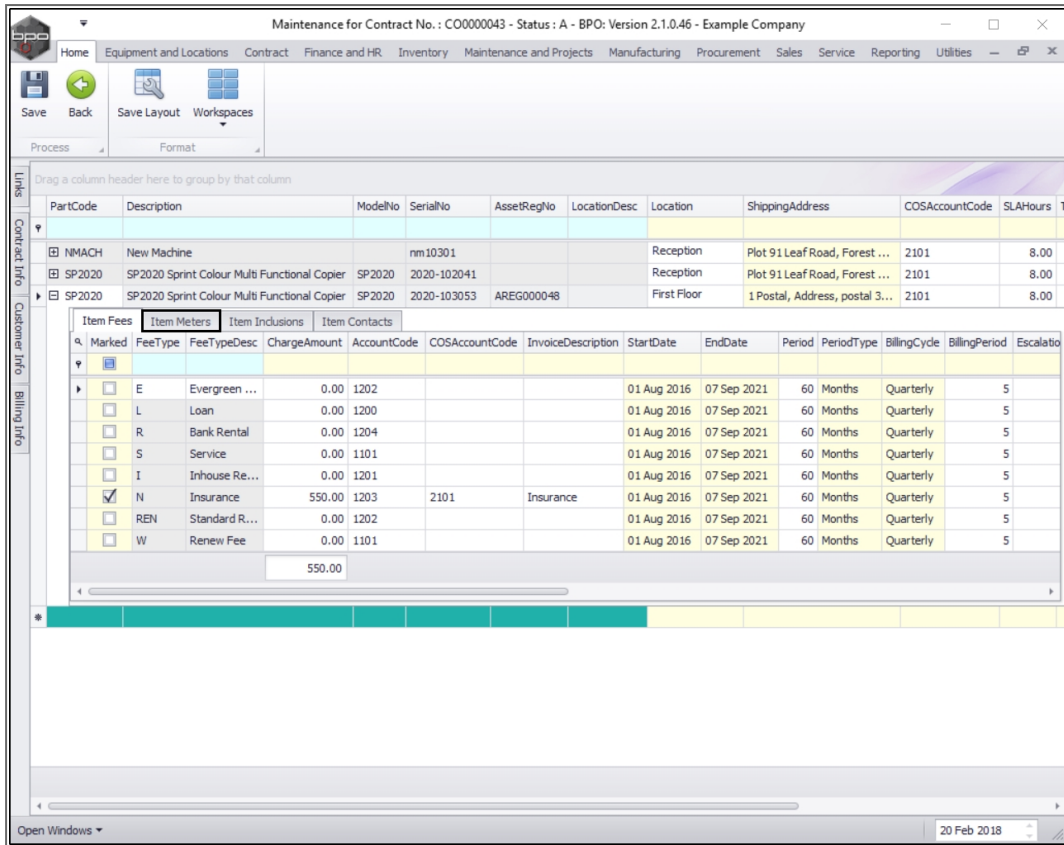
Drag a column header here to group by that column

| PartCode | Description                                  | ModelNo | SerialNo    | AssetRegNo | LocationDesc | Location    | ShippingAddress                | COSAccountCode | SLAHours | T |
|----------|--|---------|-------------|------------|--------------|-------------|--------------------------------|----------------|----------|---|
| NMACH    | New Machine                                  |         | nm10301     |            |              | Reception   | Plot 91 Leaf Road, Forest ...  | 2101           | 8.00     |   |
| SP2020   | SP2020 Sprint Colour Multi Functional Copier | SP2020  | 2020-102041 |            |              | Reception   | Plot 91 Leaf Road, Forest ...  | 2101           | 8.00     |   |
| SP2020   | SP2020 Sprint Colour Multi Functional Copier | SP2020  | 2020-103053 | AREG000048 |              | First Floor | 1 Postal, Address, postal 3... | 2101           | 8.00     |   |

Links: Contract Info | Customer Info | Billing Info

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- The **Items** data grid will expand.
- Click on the **Item Meters** tab.



- The **Item Meters** frame will be displayed.

## SELECT THE METER

- If there is more than one meter, identify which meter you wish to make changes to, and ensure that you edit the fields in the row of that meter.

[Read this Important Note on Min Billing and Meter Charge Setup](#)

- Type in or use the arrow indicators to make the changes to the **Min Billing** field and **Min Qty** field for minimum billing charges, as required.

Maintenance for Contract No. : CO000043 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Drag a column header here to group by that column

| PartCode | Description                                  | ModelNo | SerialNo    | AssetRegNo | LocationDesc | Location    | ShippingAddress                | COSAccountCode | SLAHours | T |
|----------|--|---------|-------------|------------|--------------|-------------|--------------------------------|----------------|----------|---|
| NMACH    | New Machine                                  |         | nm10301     |            |              | Reception   | Plot 91 Leaf Road, Forest ...  | 2101           | 8.00     |   |
| SP2020   | SP2020 Sprint Colour Multi Functional Copier | SP2020  | 2020-102041 |            |              | Reception   | Plot 91 Leaf Road, Forest ...  | 2101           | 8.00     |   |
| SP2020   | SP2020 Sprint Colour Multi Functional Copier | SP2020  | 2020-103053 | AREG000048 |              | First Floor | 1 Postal, Address, postal 3... | 2101           | 8.00     |   |

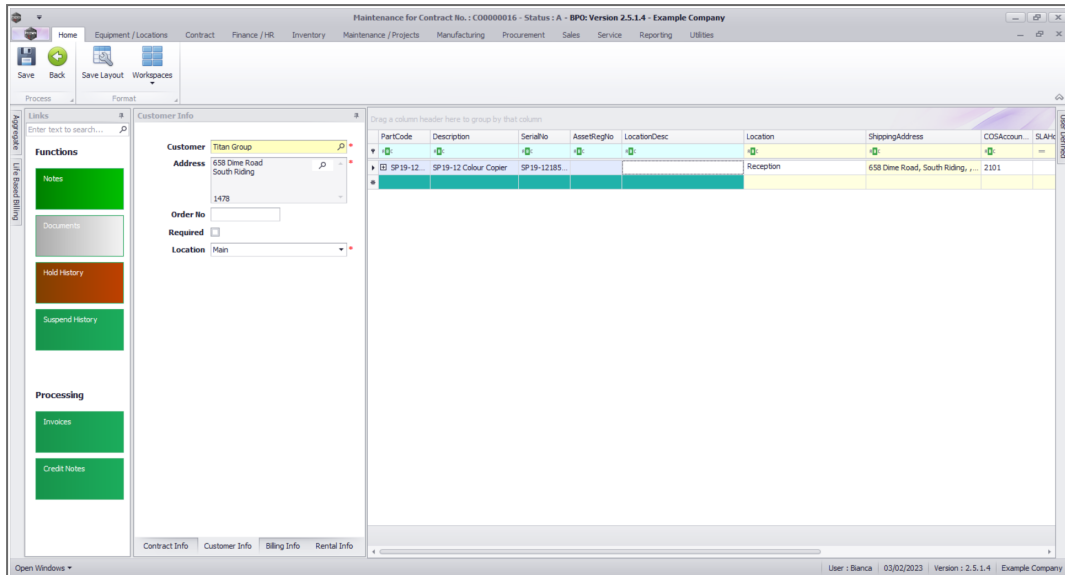
| Item Fees                           | Item Meters | Item Inclusions | Item Contacts |            |             |             |             |                |                 |                |              |          |
|-------------------------------------|-------------|-----------------|---------------|------------|-------------|-------------|-------------|----------------|-----------------|----------------|--------------|----------|
| Marked                              | MeterCode   | StartReading    | ReadingDate   | MinBilling | MinQuantity | AccountCode | COSAccou... | EscalationP... | EscalationT...  | EscalationA... | SupplierCode | Supplier |
| <input checked="" type="checkbox"/> | Mono        | 0.00            | 13 Apr 2017   | 250.00     | 1000        | 1101        | 2101        | 5              | Percentage      | 10.00          |              |          |
| <input checked="" type="checkbox"/> | Colour      | 0.00            | 13 Apr 2017   | 380.00     | 1000        | 1101        | 2101        | 5              | Percentage      | 10.00          |              |          |
|                                     |             |                 |               |            |             |             |             |                | Select esc t... |                |              |          |

Open Windows | 20 Feb 2018

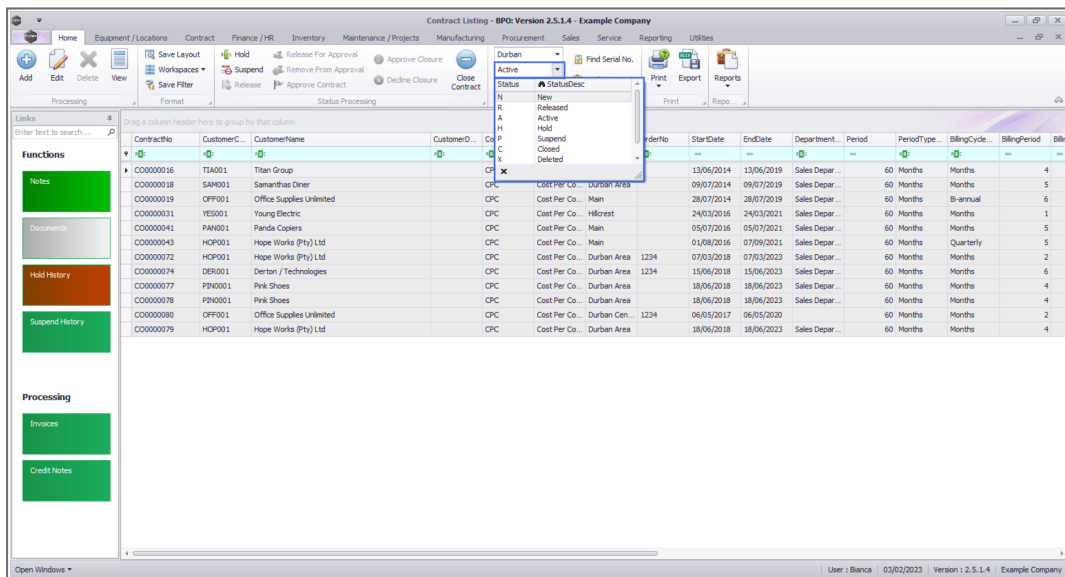
## SAVE METER CHARGE CHANGES

## SAVE THE CONTRACT

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

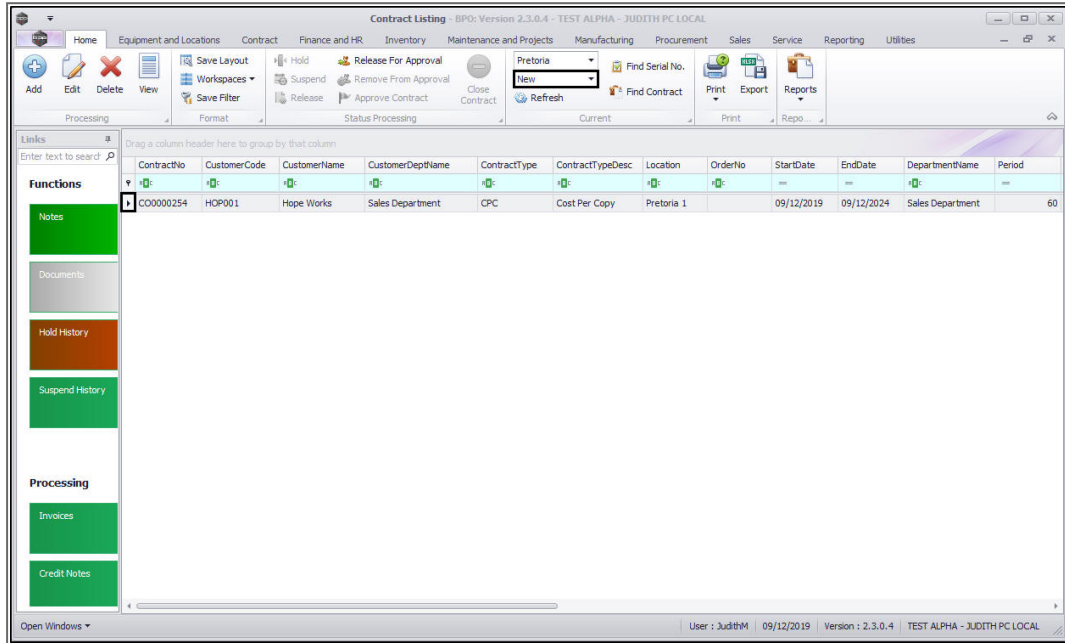


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **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.



MNU.112.036