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

CONTRACTS

CONTRACT CLOSURE APPROVAL

When a contract is closed, the status is changed **End of Contract**, and must either be Approved to fully process the closure, or Declined in order to release from the Closure process.

Various closure actions could occur depending on your company's configuration and type of contract item(s).

Contracts could have one or multiple items linked, such as:

- Locations (no action required for the item)

- Client Assets (no action required, unless the equipment requires Buy Back - Refer to"The Contract Expiry Listing Screen" on page 1)

- Internal Assets (rental equipment that must be returned to store, unless the equipment requires Sell Off)

- Loan Units (internal assets loaned to the client that must be returned to store)

In order for assets to be returned to store, a work order is required against which a return request is raised, that can then actioned by the storeman when the item is physically returned. The work order and return request are created by BPO during the contract closure process.

Your company configuration may be set to raise a contract closure call. This will create a Call with an underlying work order against which the asset can

be returned. The benefit of this process, is that a technician can be assigned to the call to collect the asset from the client premises.

Ribbon Select **Contract > Contracts**
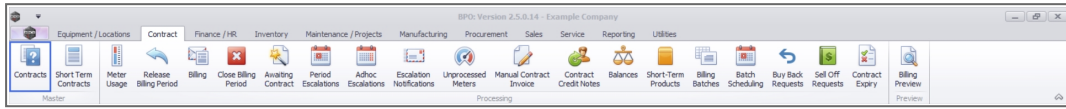
The **Contract Listing** screen will be displayed.

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.

END OF CONTRACT

- Select the **End of Contract** status.

APPROVE CONTRACT CLOSURE

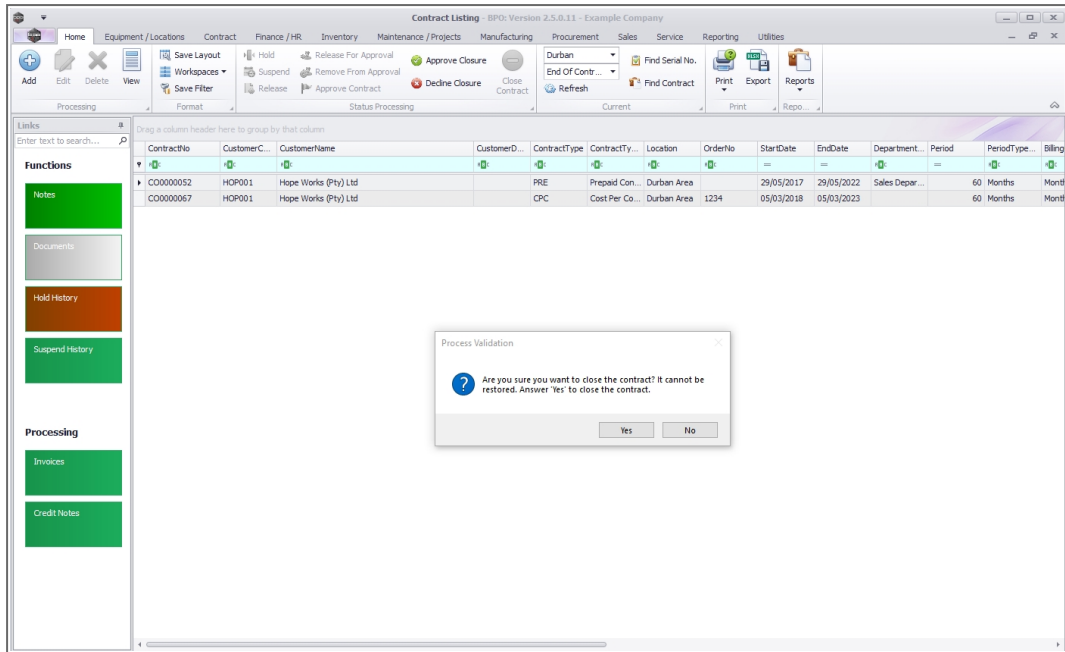- Select the contract.
- Click on the **Approve Closure** button.
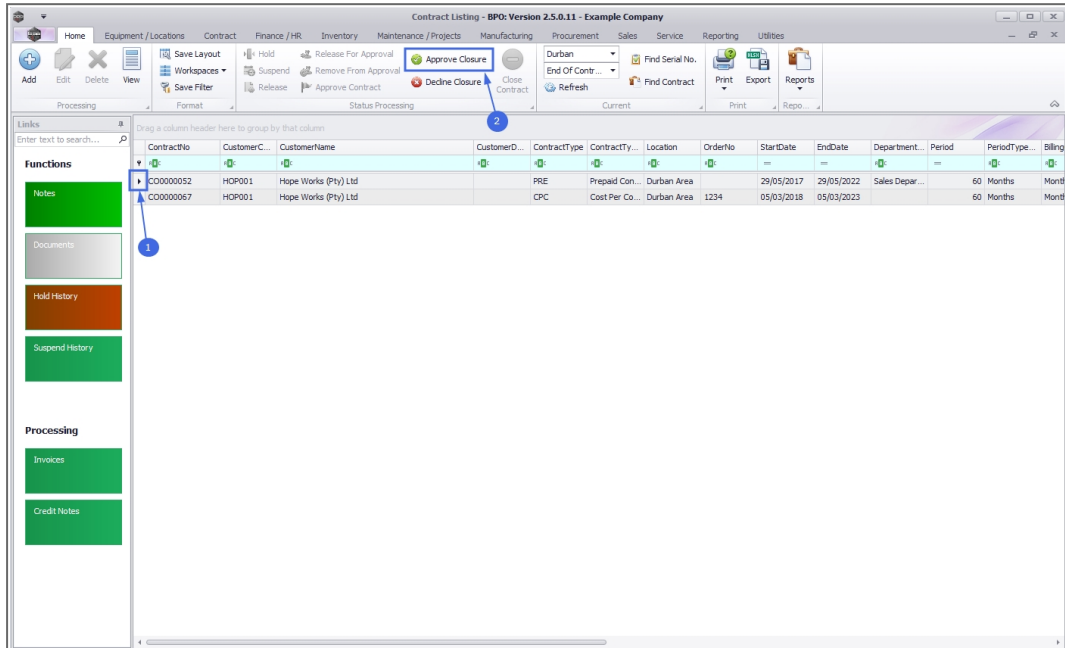
A message box will come up, asking:

Are you sure you want to close the contract? It cannot be restored. Answer 'Yes' to close the Contract.

- Click on the **Yes** button.

Loan Unit on Contract

If a message box will comes up, noting: **Serial No. [serial number] is a loan unit and must be returned on call reference - [call number].** then the contract closure cannot be completed.

You will need to follow this process:

- Decline Contract Closure (this will move the contract to Released status)

- Release Contract for Approval (this will move the contract to Active status)

- Remove the Loan Unit from the contract

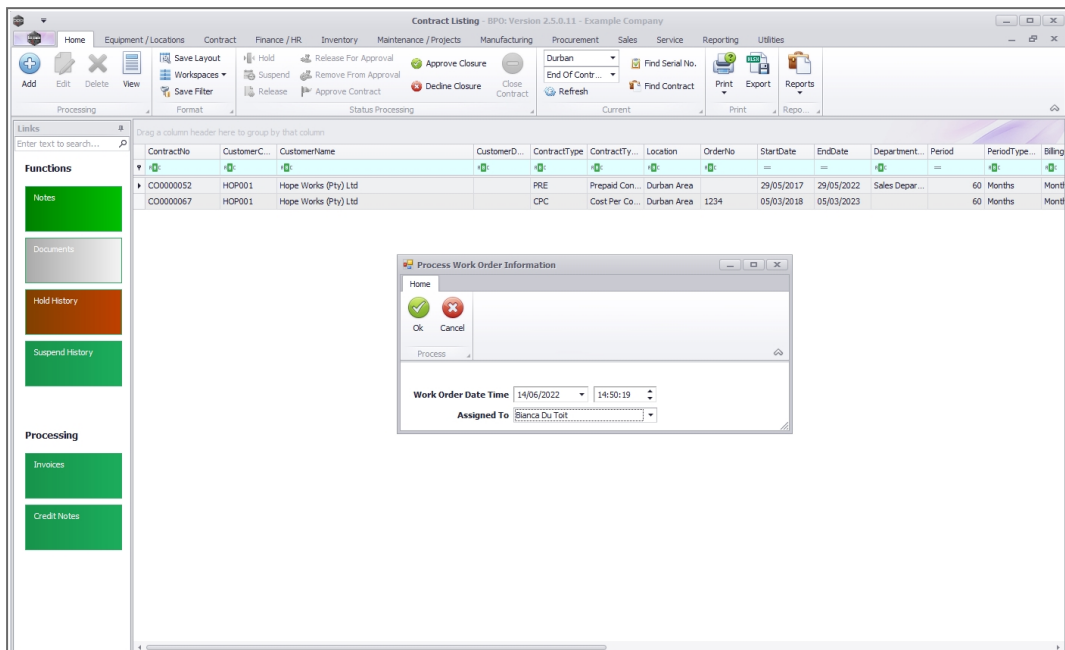- Close Contract

- Return here to Approve Contract Closure
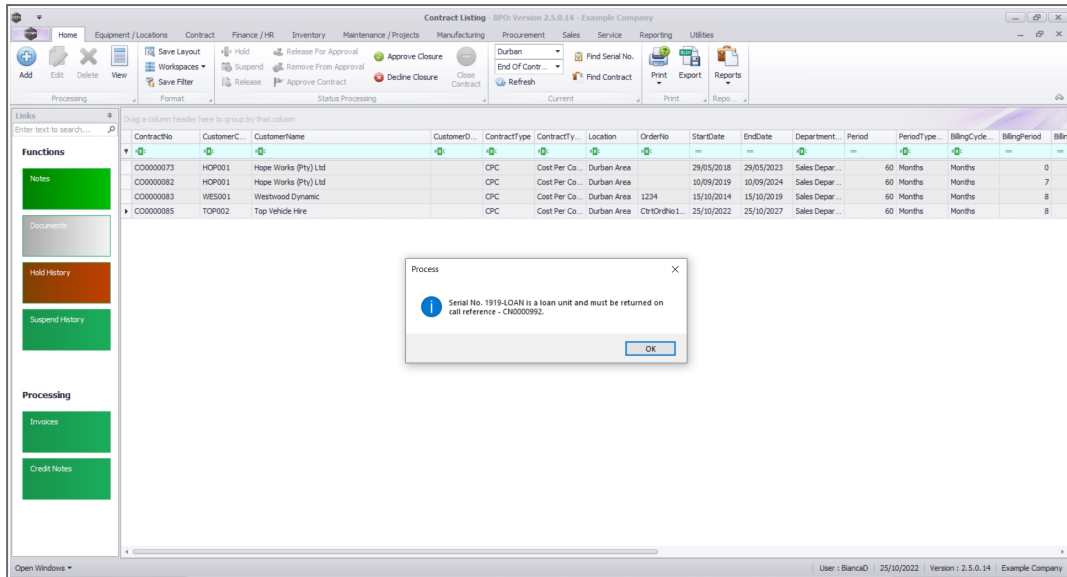
Internal Asset Return via Work Order

If a message box will comes up, noting: **A work order will be created to return the internal assets to the warehouse** then one or more internal assets exist on the contract which must be returned to store.

- Click on the **Ok** button.
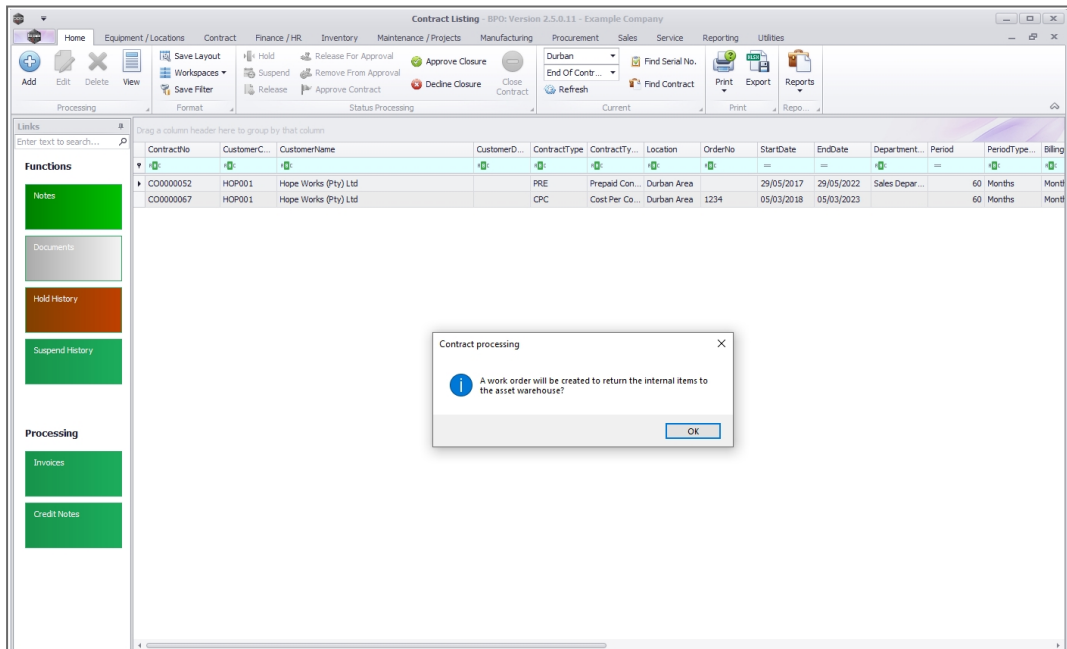
- The Process Work Order Information screen will come up.
- Select the **Work Order Date** and **Assigned To** employee.
- Click on **Ok**.

The storeman will need to action the Return Request that is auto created.

If your company configuration is set to raise a contract closure call, you can assign a Technician to the call to collect the item before the storeman processes the Return Request.

Closure Confirmation

- A message box will come up, noting: **The contract number** [contract number]**, has been closed.**
- Click on the **Ok** button.
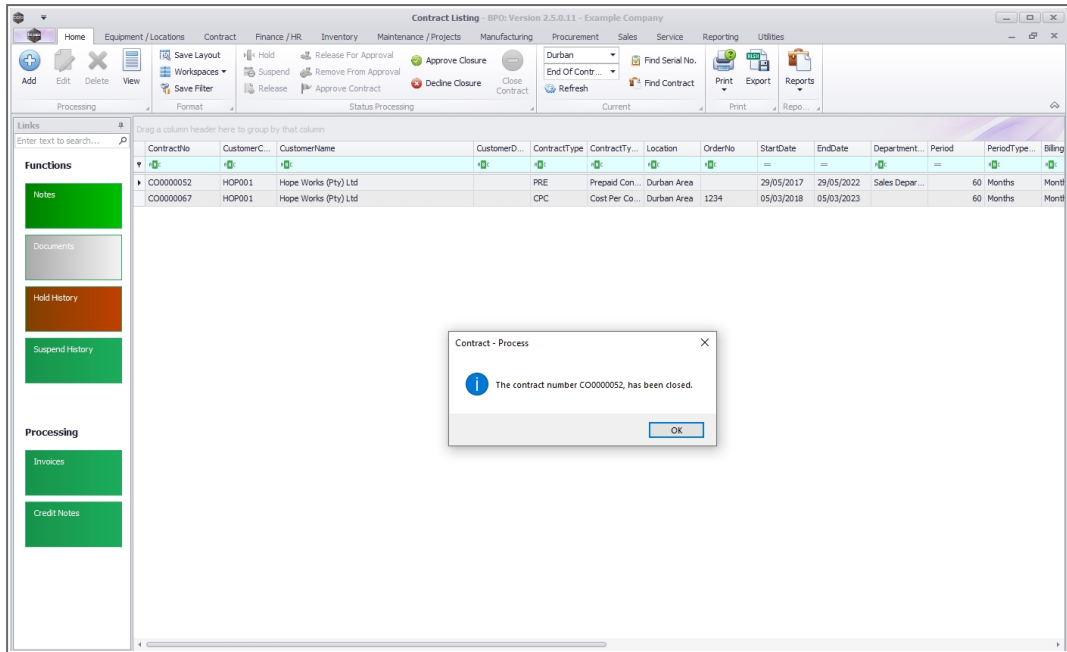
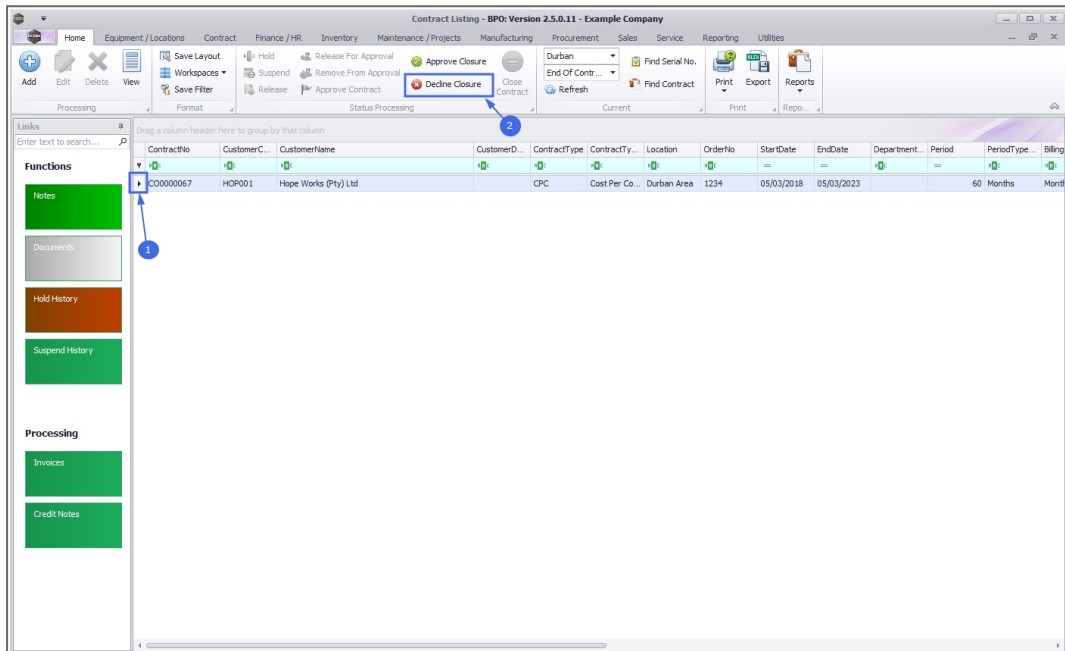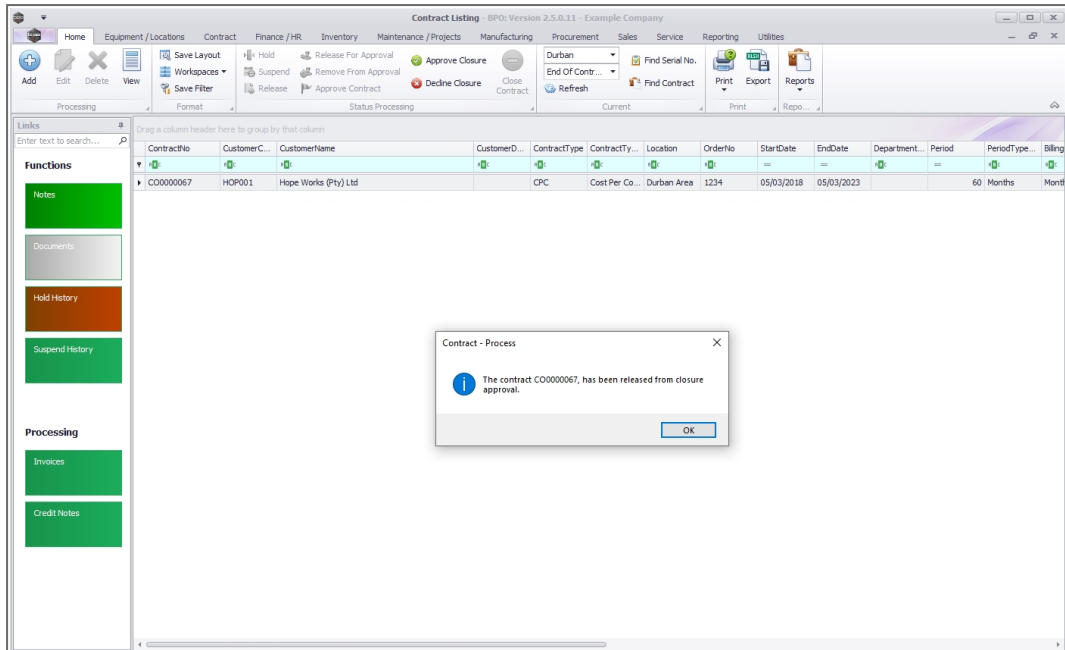- The contract status will changed to **Closed**.
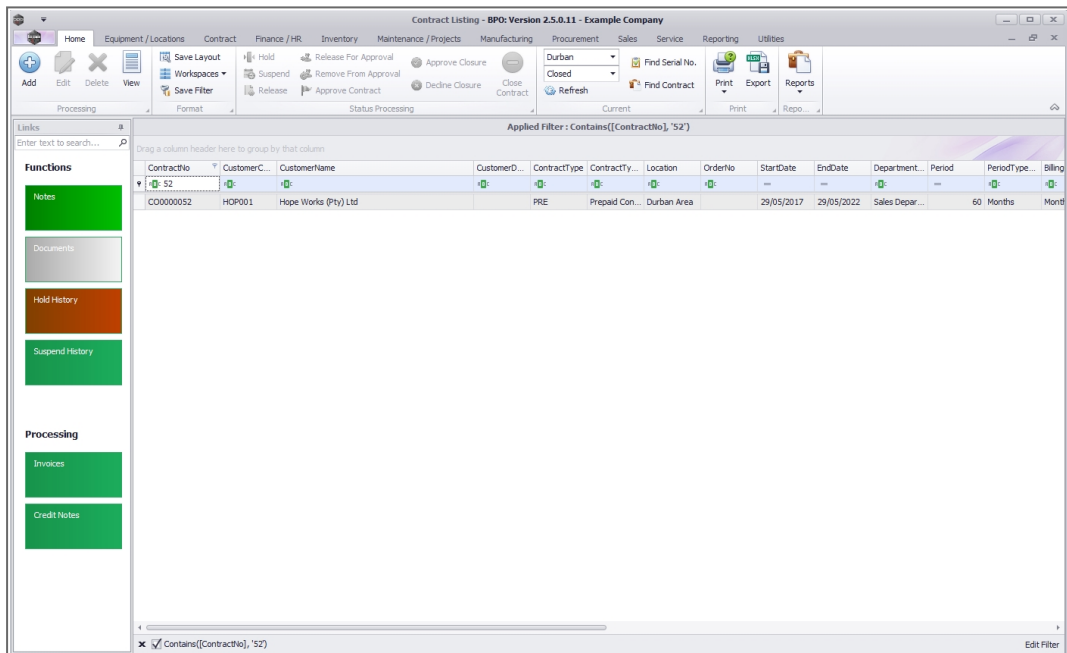
DECLINE CONTRACT CLOSURE

If the contract was closed in error, or further processing is required before the contract should be closed, then Decline the Closure.
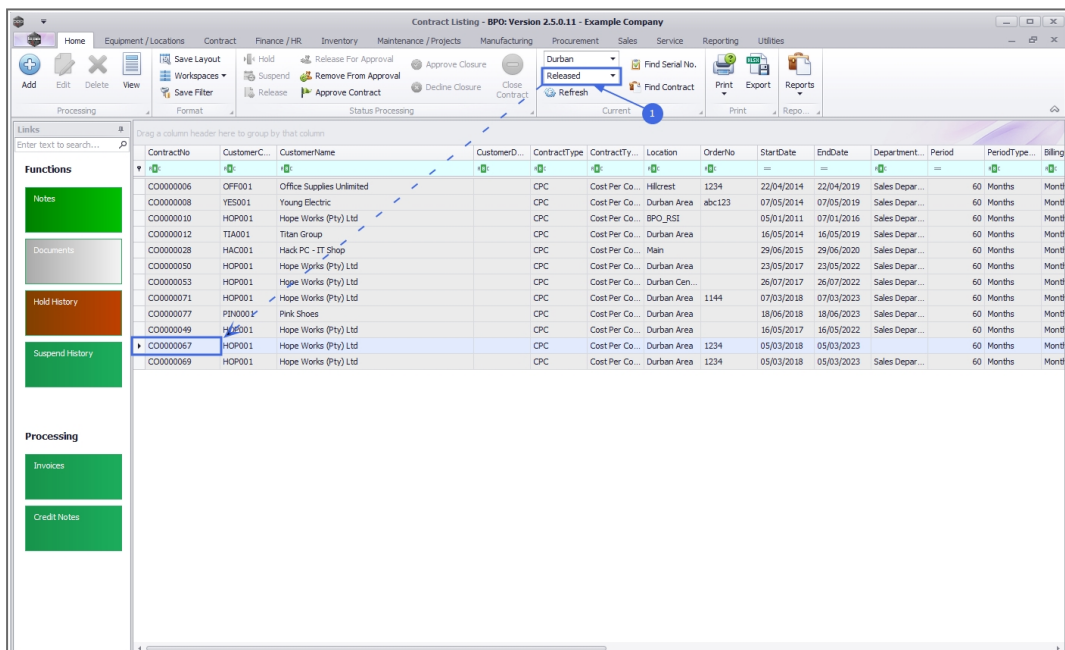
- Select the contract.
- Click on the **Decline Closure** button.

- A message box will come up, noting: **The contract number [contract number], has been release from closure approval.**
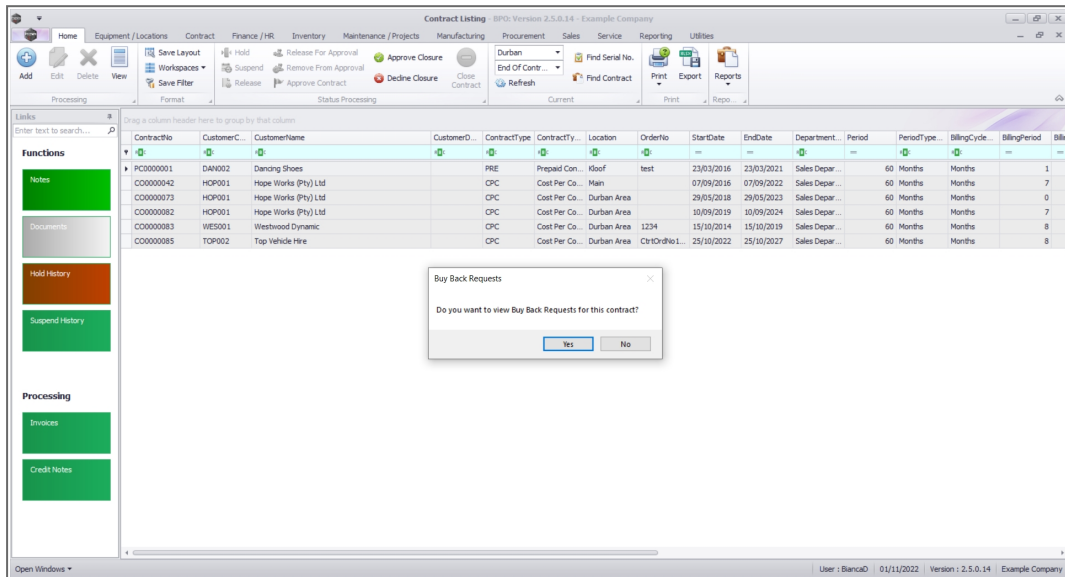- Click on the **Ok** button.

- The contract status will changed to **Released**. The contract will need to be <u>Approved</u> before it is **Active** again.
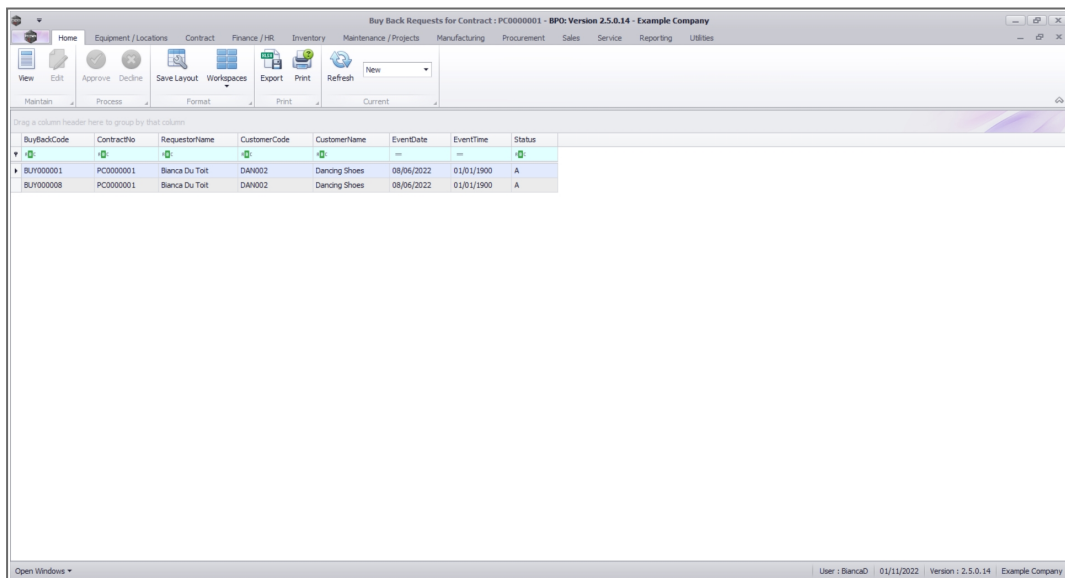
If any Buy Back Requests were created via Contract Expiry that have not yet been approved, you will be asked if you would like to view those requests: **Do you want to view Buy Back Requests for this contract?**

- Click on the **Yes** button.

- The **Buy Back Request Listing** screen will open displaying the relevant requests for this contract. <u>Approve</u> or <u>Decline</u> as required.

Related Topics

- Close Contract
- Contract Expiry

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