

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

## CONTRACT

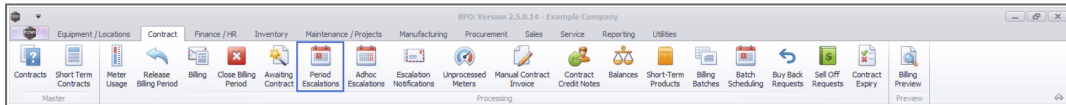
### PERIOD ESCALATIONS

Period Escalations are run on a monthly basis during the month end billing run.

Escalation period and amount is determined by the contract item fee / meter setup details.

You will run escalations for the **upcoming** month, at the **end** of the current month.

#### Ribbon Select **Contract > Period Escalations**



The **Period Escalation Processing** screen will be displayed.

Upon opening, this processing screen displays a list of contract billing periods with processing and count columns for Fee and Meter charges.

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

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

Back Save Layout

Process... Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	No	No	0	0
May	2022	No	No	2	2
June	2022	No	No	2	9
July	2022	No	No	4	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	4	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

Open Windows

User : Blanca 20/02/2023 Version : 2.5.1.4 Example Company

## VIEW FEES AND METERS

Fees and Meters will be marked as follows:

1. **Green** - Financial Months that have been processed.
2. **Yellow** - Available Financial Month yet to process.
3. **Red** - Unprocessed Financial Months that cannot be processed yet.

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

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

Back Save Layout

Process... Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	No	No	0	0
May	2022	No	No	2	2
June	2022	No	No	2	9
July	2022	No	No	4	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	4	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

Open Windows

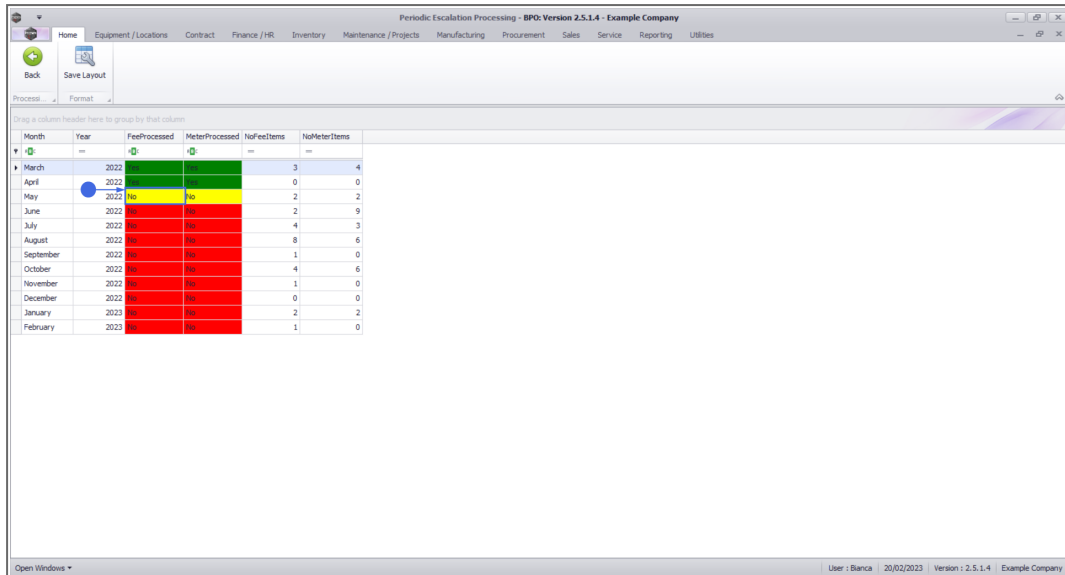
User : Blanca 20/02/2023 Version : 2.5.1.4 Example Company

1. The **No Fee Items** column will show you the number of contract item **fees** that are to be escalated in the relevant billing period.
2. The **No Meter Items** column will show you the number of contract item **meters** that are to be escalated in the relevant billing period.

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022			3	4
April	2022	No		0	0
May	2022			2	2
June	2022			2	9
July	2022			4	3
August	2022			8	6
September	2022			1	0
October	2022			4	6
November	2022			1	0
December	2022			0	0
January	2023			2	2
February	2023			1	0

## FEE PROCESSING

- Double click on the **available** processing period for **Fee Processed** (i.e. the yellow **No** text box in the **Fee Processed** column).

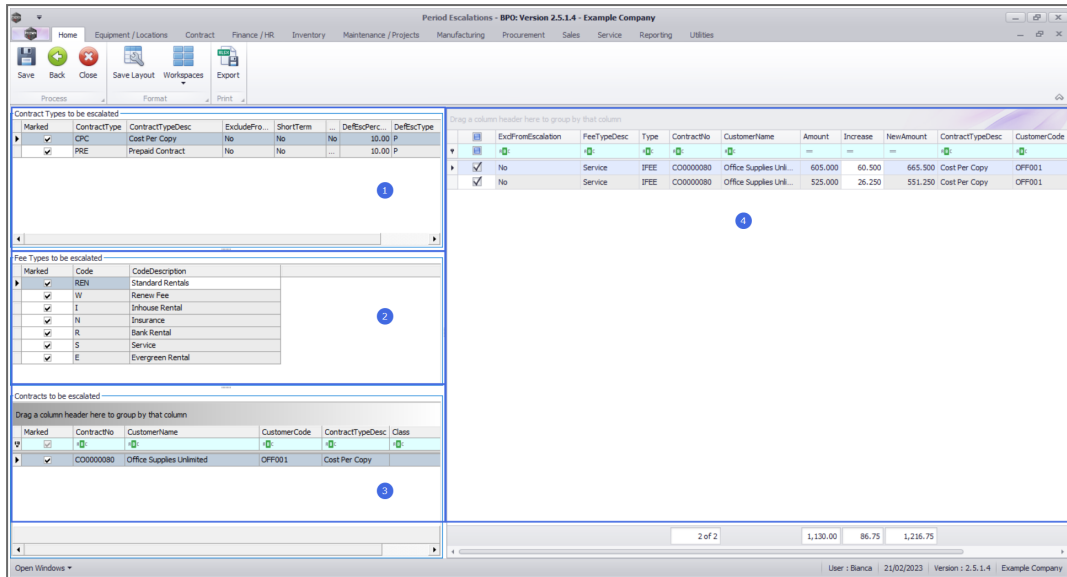


Month	Year	FeeProcessed	MeterProcessed	NoFees/Items	NoMeter/Items
March	2022	Yes	Yes	3	4
April	2022	No	No	0	0
May	2022	No	No	2	2
June	2022	No	No	2	9
July	2022	No	No	4	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	4	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

## The 'Period Escalations' for Fees screen

The **Period Escalations** (for fees) screen will be displayed. This screen is divided into **4** frames:

1. **Contract Types to be escalated.**
2. **Fee Types to be escalated.**
3. **Contracts to be escalated.**
4. **Contract Items Charges** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.



## User Defined Fields

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

### Version Compatibility<sup>1</sup>

Contract **Class** and **Category**, as defined on the contract, can be useful when filtering for contracts that you need to escalate.

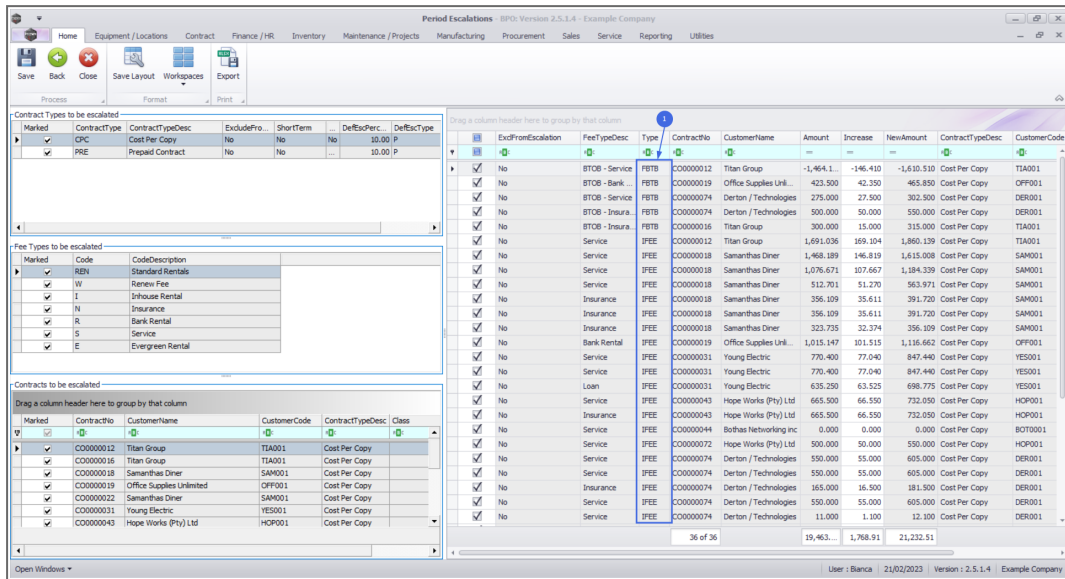
<sup>1</sup> BPO2 v2.5.0.8 or higher. " **Add Interest Rate** " on page 3

## Mark Items to be Escalated

- You can use the **Marked** check boxes to select the **Contract Types**, **Fee Types**, **Contracts** and **Contracts Items** that you wish to escalate.

- Each contract item meter charge will be listed individually, as follows:

- Item Fee (IFEE)
- Item Fee Back to Back (FBTB)



In the Linked Contract Item Charges Listing frame, look at the **Amount**, **Increase** and **New Amount** columns.

- **Amount:** This is the amount of the fee that is being charged.
- **Increase:** This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a **Percentage** or a **Flat Amount**).
  - In this image, the amount already set up on the system is a 10% escalation.
- **New Amount:** This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

Review these amounts to make sure they are correct, individual changes to the **Increase** amount can be made if required.

## SAVE FEE ESCALATIONS

- Click on **Save**.

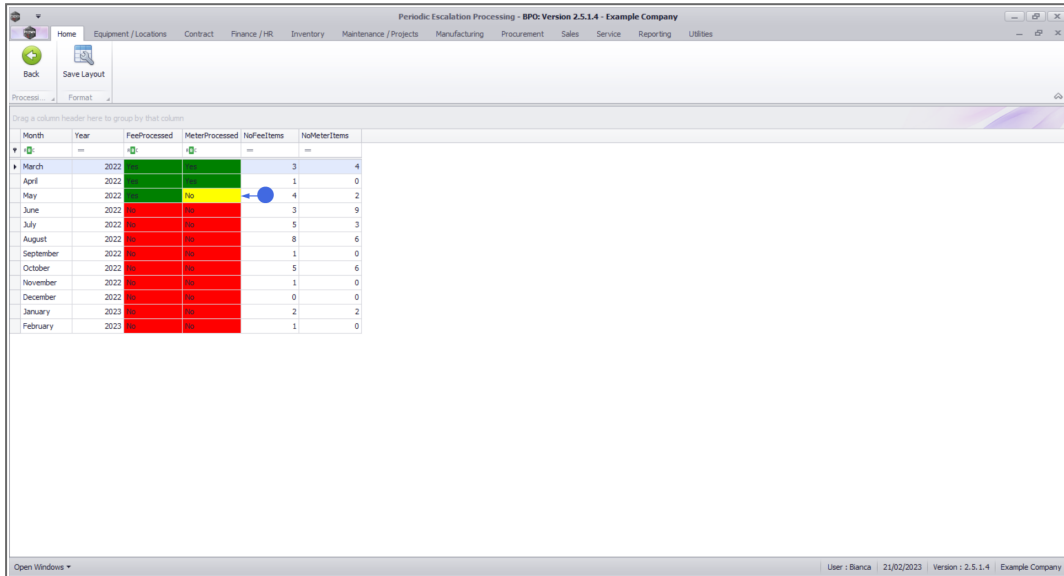
1. A **Run Period Escalations** message will pop asking you;
  - Are you sure you want to process this escalation?
2. Click on **Yes**.



1. You will return to the **Period Escalations Processing** screen.
2. The **Fee Processed** colour will change from yellow to **green** for the processed period.

## METER PROCESSING

1. In the **Period Escalation Processing** screen,
2. Double click on the **available** processing period for **Meter Processed** (i.e. the yellow **No** text box in the **Meter Processed** column).



Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	No	4	2
June	2022	No	No	3	9
July	2022	No	No	5	3
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	5	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	2
February	2023	No	No	1	0

## The 'Period Escalations' for Meters screen

The **Period Escalations** (for meters) screen will be displayed. This screen is divided into **4** frames:

1. **Contract Types to be escalated**
2. **Fee Types to be escalated**
3. **Contracts to be escalated**
4. **Contract Items** frame: where contract items that meet the requirements selected in frames **1**, **2** and **3** are displayed.

The screenshot displays the 'Period Escalations' software interface. It features a top navigation bar with tabs for Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the navigation bar are buttons for Save, Back, Close, Save Layout, Workspaces, and Export. The main area is divided into several sections:

- Contract Types to be escalated:** A table with columns: Marked, ContractType, ContractTypeDesc, ExcludeFro, ShortTerm, DeEscPerc, DeEscType. The 'Marked' column has a checked box for the 'CPC' row.
- Fee Types to be escalated:** A table with columns: Marked, Code, CodeDescription. The 'UNITCHARGE' row is checked.
- Contracts to be escalated:** A table with columns: Marked, ContractNo, CustomerName, CustomerCode, ContractTypeDesc, Class. The 'CO000016' row is checked.
- Main Data Table:** A large table with columns: ExclFromEscalation, FeeTypeDesc, Type, ContractNo, CustomerName, Amount, Increase, NewAmount, ContractTypeDesc, CustomerCode. It lists various contract items with their respective details.

- You can use the **Marked** check boxes to select the **Contract Types, Fee Types, Contracts, Contracts Items** that you wish to escalate.

This screenshot shows a more detailed view of the 'Period Escalations' software interface. The 'Marked' checkbox in the 'Contract Types to be escalated' section is checked. The main data table is expanded to show individual contract items, including their contract numbers, customer names, and amounts. The 'CO000016' item is highlighted, showing its details.

- Each contract item meter charge will be listed individually, as follows:
  - **Item Meter Minimum Billing (IMTR)**
  - **Item Meter Cost per Copy (MTCH)**

- Item Meter Back to Back Minimum Billing (MBTB)
- Item Meter Back to Back Cost per Copy (CBTB)
- Item Aggregate Meter Minimum Billing (AMTR)
- Item Aggregate Meter Cost per Copy (AMCH)

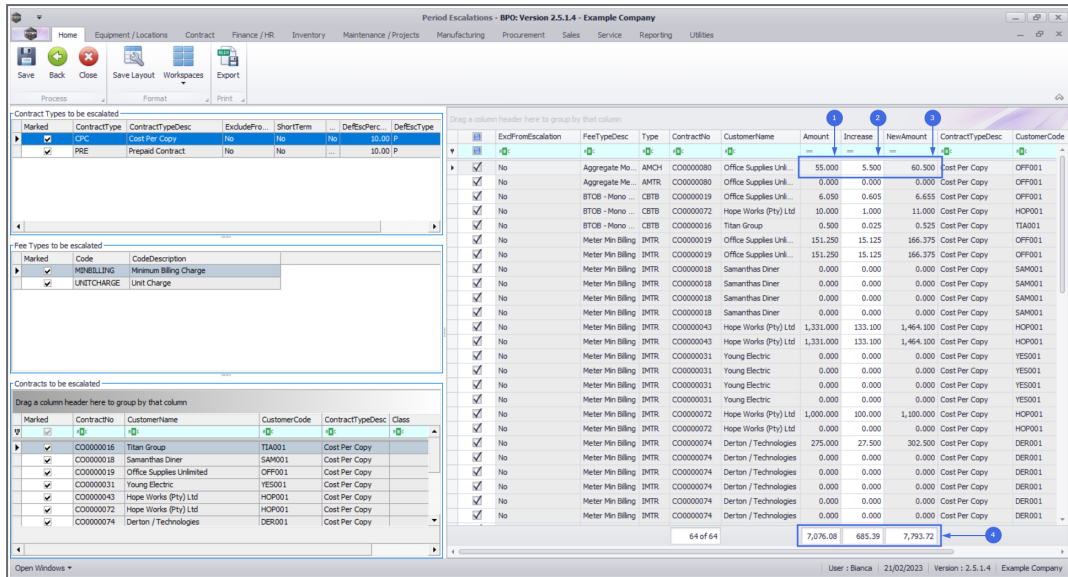
The screenshot shows the 'Period Escalations' window in the software. The main table displays a list of contract items with the following columns: ExclFromEscalation, FeeTypeDesc, Type, ContractNo, CustomerName, Amount, Increase, NewAmount, ContractTypeDesc, and CustomerCode. A blue circle highlights the 'Amount' column header. Below the main table, there are three smaller tables: 'Contract Types to be escalated', 'Fee Types to be escalated', and 'Contracts to be escalated'.

ExclFromEscalation	FeeTypeDesc	Type	ContractNo	CustomerName	Amount	Increase	NewAmount	ContractTypeDesc	CustomerCode
<input checked="" type="checkbox"/>	Aggregate Mo. AMCH		CO000080	Office Supplies Unl...	55.000	5.500	60.500	Cost Per Copy	OFF001
<input checked="" type="checkbox"/>	Aggregate Me. AMTR		CO000080	Office Supplies Unl...	0.000	0.000	0.000	Cost Per Copy	OFF001
<input checked="" type="checkbox"/>	BT08 - Mono. CBTB		CO000019	Office Supplies Unl...	6.050	0.605	6.655	Cost Per Copy	OFF001
<input checked="" type="checkbox"/>	BT08 - Mono. CBTB		CO000072	Hope Works (Pty) Ltd	10.000	1.000	11.000	Cost Per Copy	HOP001
<input checked="" type="checkbox"/>	BT08 - Mono. CBTB		CO000016	Titan Group	0.500	0.025	0.525	Cost Per Copy	TIAD01
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000019	Office Supplies Unl...	151.250	15.125	166.375	Cost Per Copy	OFF001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000019	Office Supplies Unl...	151.250	15.125	166.375	Cost Per Copy	OFF001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000018	Samanthas Diner	0.000	0.000	0.000	Cost Per Copy	SAM001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000018	Samanthas Diner	0.000	0.000	0.000	Cost Per Copy	SAM001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000018	Samanthas Diner	0.000	0.000	0.000	Cost Per Copy	SAM001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000018	Samanthas Diner	0.000	0.000	0.000	Cost Per Copy	SAM001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000043	Hope Works (Pty) Ltd	1,331.000	133.100	1,464.100	Cost Per Copy	HOP001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000043	Hope Works (Pty) Ltd	1,331.000	133.100	1,464.100	Cost Per Copy	HOP001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000031	Young Electric	0.000	0.000	0.000	Cost Per Copy	YES001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000031	Young Electric	0.000	0.000	0.000	Cost Per Copy	YES001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000031	Young Electric	0.000	0.000	0.000	Cost Per Copy	YES001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000031	Young Electric	0.000	0.000	0.000	Cost Per Copy	YES001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000072	Hope Works (Pty) Ltd	1,000.000	100.000	1,100.000	Cost Per Copy	HOP001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000072	Hope Works (Pty) Ltd	0.000	0.000	0.000	Cost Per Copy	HOP001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000074	Derton / Technologies	275.000	27.500	302.500	Cost Per Copy	DER001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000074	Derton / Technologies	0.000	0.000	0.000	Cost Per Copy	DER001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000074	Derton / Technologies	0.000	0.000	0.000	Cost Per Copy	DER001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000074	Derton / Technologies	0.000	0.000	0.000	Cost Per Copy	DER001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000074	Derton / Technologies	0.000	0.000	0.000	Cost Per Copy	DER001
<input checked="" type="checkbox"/>	Meter Min Billing DMTR		CO000074	Derton / Technologies	0.000	0.000	0.000	Cost Per Copy	DER001
					64 of 64	7,076.08	685.39	7,761.47	

In the Linked Contract Item Charges Listing frame, look at the **Amount**, **Increase** and **New Amount** columns.

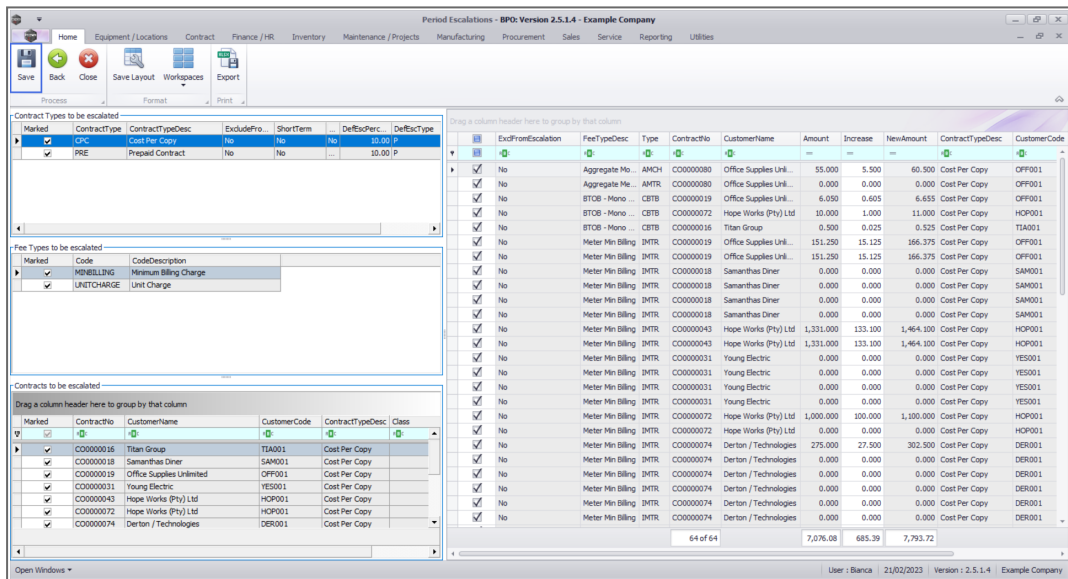
- **Amount:** This is the amount of the fee that is being charged.
- **Increase:** This is the amount by which this fee will increase when the periodic escalation set on the contract is applied. (This can either be a **Percentage** or a **Flat Amount**).
  - In this image, the amount already set up on the system is a 10% escalation.
- **New Amount:** This is the new amount of the fee once the increase has been added. (Amount + Increase = New Amount)

Review these amounts to make sure they are correct, individual changes to the **Increase** amount can be made if required.



## Save Meter Escalations

- Click on **Save**.



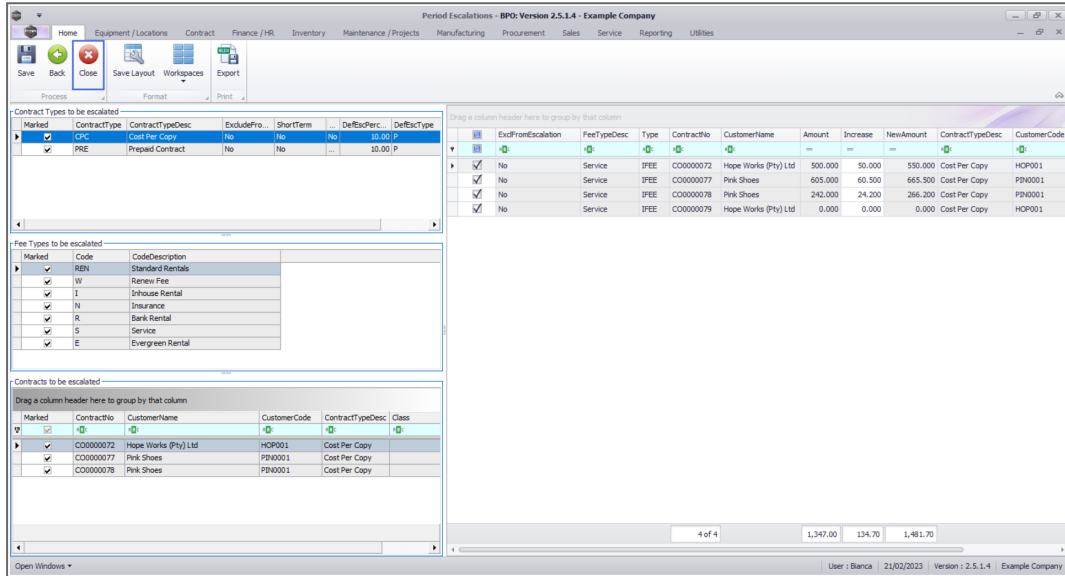
1. A Run Period Escalations message will pop asking you;
  - Are you sure you want to process this escalation?
2. Click on **Yes**.

- The **Meter Processed** colour will change from **yellow** to **green** for the processed period.
- Period Escalation processing for the upcoming month will now be complete.
- Click on **Back** to exit this screen.

## IMPORTANT NOTES

### CLOSING OFF AN ESCALATION WITHOUT ESCALATING CONTRACTS

- In the **Period Escalation** screen, click on **Close** if you want to close off a fee/meter escalation **without** escalating your contracts.



1. An **Escalation Processing** message will pop up asking you;
  - **Are you sure you want to close the period and not perform the escalations? This action will uncheck all the items.**
2. Click on **Yes**.

The screenshot shows the 'Period Escalations' window with a list of contract items. A dialog box is open, asking for confirmation to close the period and uncheck all items. The main table has columns for 'Marked', 'ContractType', 'ContractTypeDesc', 'ExcludeFromEscalation', 'ShortTerm', 'DeEscPer...', and 'DeEscType'. The 'Escalation Processing' column contains checkboxes for each row.

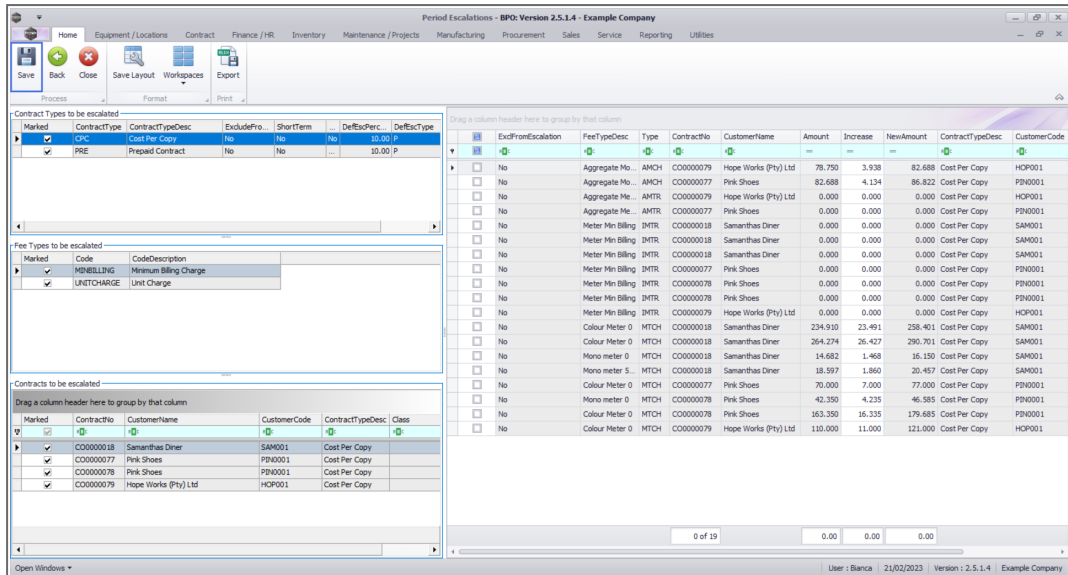
1. All the contract items to be escalated will be **unchecked**.

This screenshot shows the same software interface after the 'Save' action. The 'Escalation Processing' column now shows unchecked checkboxes for all contract items, indicating that no items are currently selected for escalation.

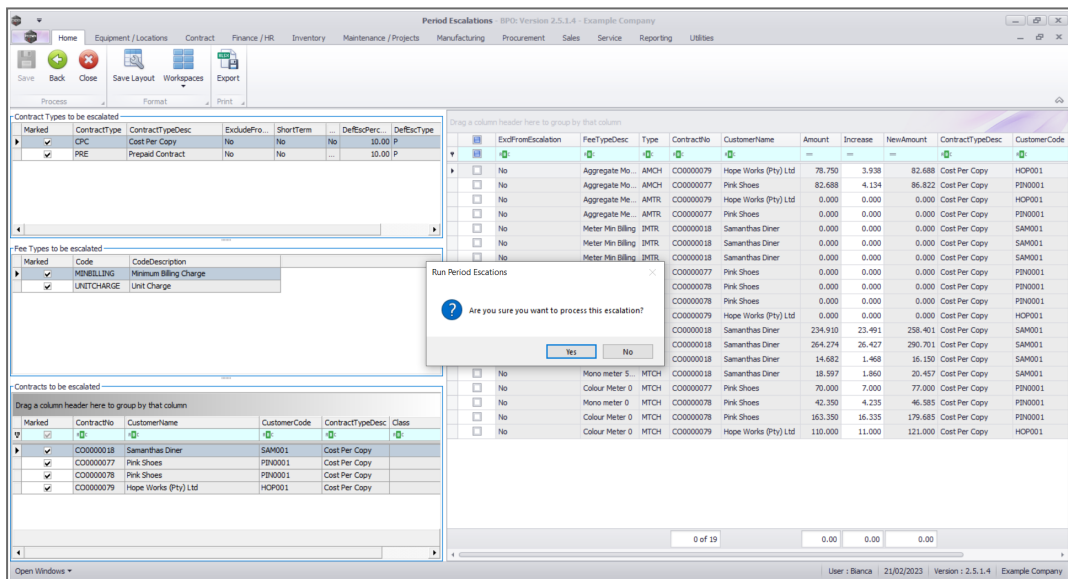
## Save Unescalated Contracts

1. Click on **Save**.

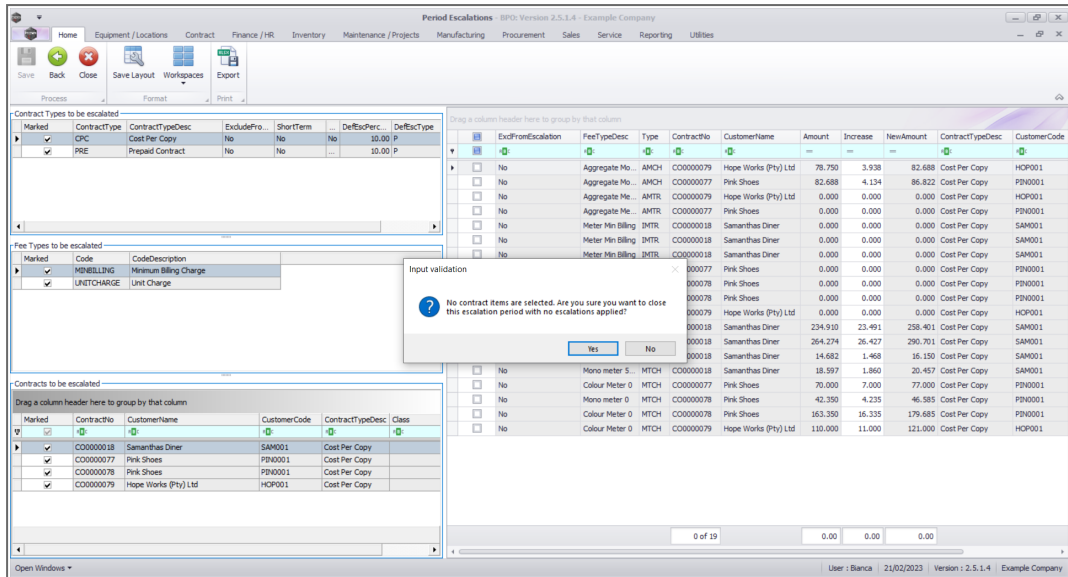




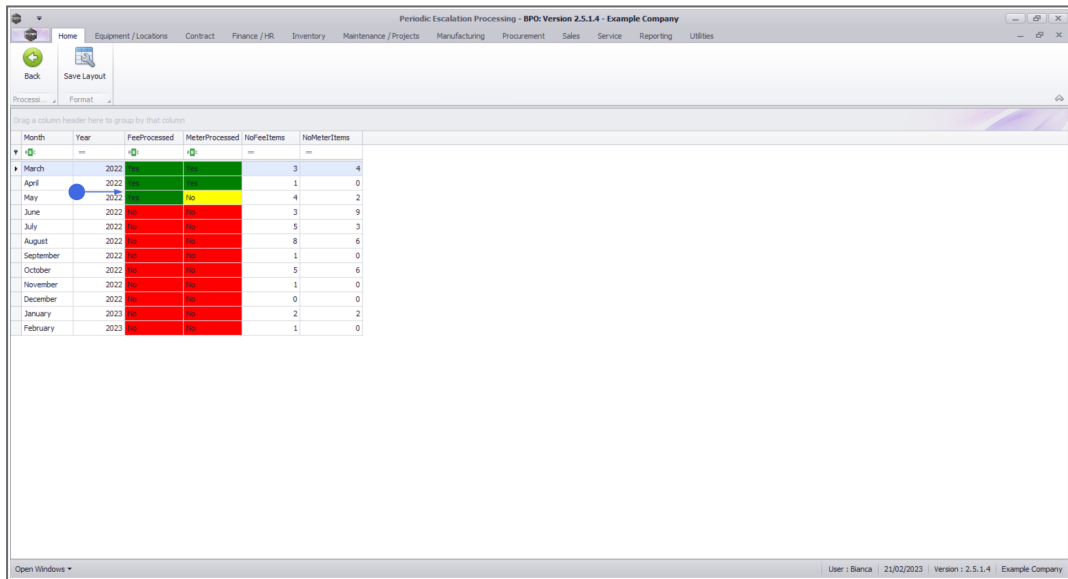
1. A **Run Period Escalations** message will pop up asking you;
  - **Are you sure you want to process this escalation?**
2. Click on **Yes**.



1. An **Input validation** message will pop up asking you;
  - **No contract items are selected. Are you sure you want to close this escalation period with no escalations applied?**
2. Click on **Yes**.



1. You will return to the **Periodic Escalation Processing** screen.
2. The **Fee/Meter Processed** colour will change to **green** for the processed period.
  - In this image, the **Fee processed** changed colour to **green**.



## NO FEES OR METERS TO PROCESS

If the period you are processing has **no** fees and or meter to process;

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

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

Back | Save Layout

Process | Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	Yes	4	3
June	2022	Yes	Yes	3	9
July	2022	No	No	0	10
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	5	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	1
February	2023	No	No	5	5

User : Bianca | 21/02/2023 | Version : 2.5.1.4 | Example Company

1. an **Escalation Processing** message box will pop up asking;
  - **No items exist to be escalated. Do you wish to close this escalation period type?**
2. Click on **Yes**.

Periodic Escalation Processing - BPO: Version 2.5.1.4 - Example Company

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

Back | Save Layout

Process | Format

Drag a column header here to group by that column

Month	Year	FeeProcessed	MeterProcessed	NoFeeItems	NoMeterItems
March	2022	Yes	Yes	3	4
April	2022	Yes	Yes	1	0
May	2022	Yes	Yes	4	3
June	2022	Yes	Yes	3	9
July	2022	No	No	0	10
August	2022	No	No	8	6
September	2022	No	No	1	0
October	2022	No	No	5	6
November	2022	No	No	1	0
December	2022	No	No	0	0
January	2023	No	No	2	1
February	2023	No	No	5	5

Escalation Processing

ⓘ No items exist to be escalated. Do you wish to close this escalation period type?

Yes No

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