

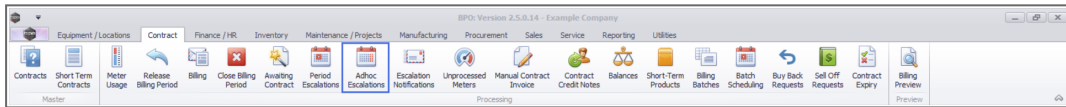
We are currently updating our site; thank you for your patience.

CONTRACT

ADHOC ESCALATIONS

Adhoc escalations can be run at any time of the year, across all or selected contracts, regardless of the contract escalation period / amount.

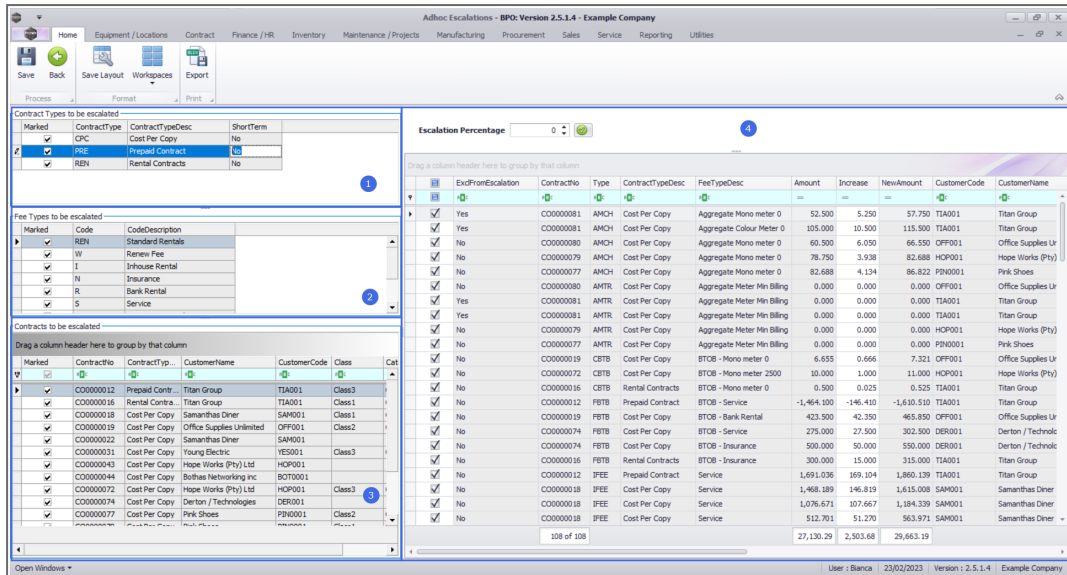
Ribbon Select Contract > Period Escalations



ADHOC ESCALATIONS SCREEN OVERVIEW

The **Adhoc Escalations** screen will be displayed, listing all **Active** contracts. 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 Compatibility¹

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

- The **check boxes** are all **marked** when you first open the Adhoc Escalations screen.
 - This means that **all** the contract types and fees will be affected by any adhoc escalation changes that are made in this screen.

¹ BPO2 v2.5.0.8 or higher. " **Add Interest Rate** " on page 3

The screenshot shows the 'Adhoc Escalations - BPO: Version 2.5.1.4 - Example Company' window. It features a top navigation bar with options like Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with Save, Back, Save Layout, Workspaces, and Export. The main interface is divided into several sections:

- Contract Types to be escalated:** A table with columns 'Marked', 'ContractType', 'ContractTypeDesc', and 'ShortTerm'. Items include CPC (Prepaid Contract), PFE (Prepaid Contract), and REN (Rental Contracts).
- Fee Types to be escalated:** A table with columns 'Marked', 'Code', and 'CodeDescription'. Items include REN (Standard Rentals), W (Renew Fee), I (Inhouse Rental), N (Insurance), R (Bank Rental), and S (Service).
- Contracts to be escalated:** A table with columns 'Marked', 'ContractNo', 'ContractTypeDesc', 'CustomerName', 'CustomerCode', 'Class', and 'Category'. It lists various contracts like CO000012 (Prepaid Contract), CO000016 (Rental Contracts), etc.
- Escalation Percentage:** A control set with a dropdown menu and a green checkmark icon.
- Main Data Table:** A large table with columns: 'EscFromEscalation', 'ContractNo', 'Type', 'ContractTypeDesc', 'FeeTypeDesc', 'Amount', 'Increase', 'NewAmount', and 'CustomerCode'. It displays a list of 108 items with their respective values and escalation status.

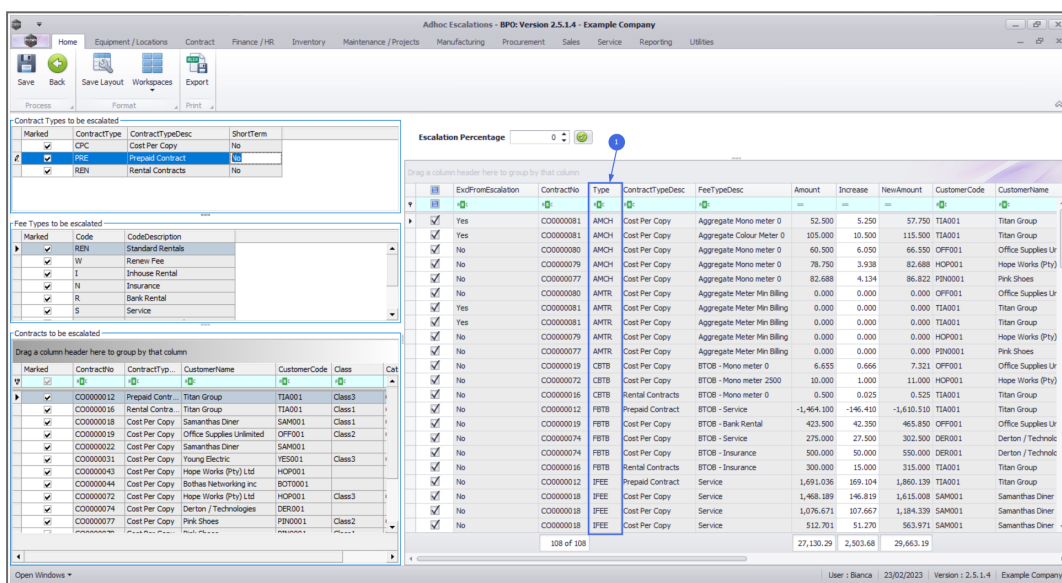
Mark Items to be Escalated

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

This screenshot shows the same software interface as above, but with different filter selections. In the 'Contract Types to be escalated' section, only 'CPC' and 'REN' are marked. In the 'Fee Types to be escalated' section, 'REN', 'W', 'I', 'N', 'R', and 'S' are all marked. The 'Contracts to be escalated' section shows a different set of selected items. The main data table on the right is also updated, showing a list of 108 items with their respective values and escalation status.

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

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



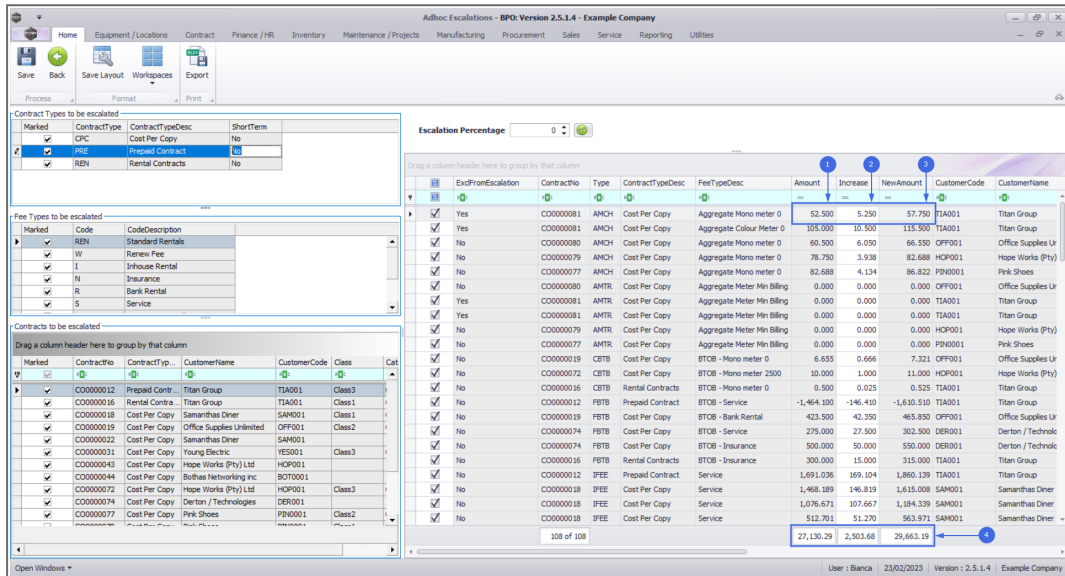
AMOUNT, INCREASE AND NEW AMOUNT COLUMNS

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)

You can make individual changes to the **Increase** amount, but when an escalation across multiple charges is required, then apply an escalation percentage across all marked items, as noted next.



ESCALATION PERCENTAGE

You can use this process to apply a percentage amount across **all** of the **selected** Contract Types, Fee types and Contract Item Charge lines.

- Click in the **Escalation Period** field and either type in or use the arrow indicators to select the percentage that you wish to escalate by.

Adhoc Escalations - BPO: Version 2.5.1.4 - Example Company

Escalation Percentage: 15

Apply

EscFromEscalation	ContractNo	Type	ContractTypeDesc	FeeTypeDesc	Amount	Increase	NewAmount	CustomerCode
Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Mono meter 0	52.500	5.250	57.750	TIA001
Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Colour Meter 0	105.000	10.500	115.500	TIA001
Yes	CO0000080	AMCH	Cost Per Copy	Aggregate Mono meter 0	60.500	6.050	66.550	OFF001
No	CO0000079	AMCH	Cost Per Copy	Aggregate Mono meter 0	78.750	3.938	82.688	HP0001
No	CO0000077	AMCH	Cost Per Copy	Aggregate Mono meter 0	82.688	4.134	86.822	PN0001
No	CO0000080	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	OFF001
Yes	CO0000081	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	TIA001
Yes	CO0000081	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	TIA001
No	CO0000079	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HP0001
No	CO0000077	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	PN0001
No	CO0000019	CEBT	Cost Per Copy	BT0B - Mono meter 0	6.655	0.666	7.321	OFF001
No	CO0000072	CEBT	Cost Per Copy	BT0B - Mono meter 2500	10.000	1.000	11.000	HP0001
No	CO0000016	CEBT	Rental Contracts	BT0B - Mono meter 0	0.500	0.025	0.525	TIA001
No	CO0000012	FBTB	Prepaid Contract	BT0B - Service	-1,464.100	-146.410	-1,610.510	TIA001
No	CO0000019	FBTB	Cost Per Copy	BT0B - Bank Rental	423.500	42.350	465.850	OFF001
No	CO0000074	FBTB	Cost Per Copy	BT0B - Service	275.000	27.500	302.500	DER001
No	CO0000074	FBTB	Cost Per Copy	BT0B - Insurance	500.000	50.000	550.000	DER001
No	CO0000016	FBTB	Rental Contracts	BT0B - Insurance	300.000	15.000	315.000	TIA001
No	CO0000012	IFEE	Prepaid Contract	Service	1,691.036	169.104	1,860.139	TIA001
No	CO0000018	IFEE	Cost Per Copy	Service	1,468.189	146.819	1,615.008	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	1,076.671	107.667	1,184.339	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	512.701	51.270	563.971	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	512.701	51.270	563.971	SAM001

- When you have selected the escalation amount, click on the **Apply** button.

Adhoc Escalations - BPO: Version 2.5.1.4 - Example Company

Escalation Percentage: 15

Apply

Yes No

- An **Escalation Processing** message box will pop up asking;
 - The Escalation percentage of [15] will be applied to all the selected items. Do you still want to proceed?
- Click on **Yes**.

The screenshot shows the 'Adhoc Escalations' window with an escalation percentage of 15%. A dialog box titled 'Escalation Processing' is displayed, stating: 'The escalation percentage of 15 will be applied to all the selected items. Do you want to proceed?' with 'Yes' and 'No' buttons.

Escalation	ContractNo	Type	ContractTypeDesc	FeeTypeDesc	Amount	Increase	NewAmount	CustomerCode
Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Mono meter 0	52.500	5.250	57.750	TTA001
Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Colour Meter 0	105.000	10.500	115.500	TTA001
Yes	CO0000080	AMCH	Cost Per Copy	Aggregate Mono meter 0	60.500	6.050	66.550	OFF001
Yes	CO0000076	AMCH	Cost Per Copy	Aggregate Mono meter 0	78.750	3.938	82.688	HP0001
Yes	CO0000076	AMCH	Cost Per Copy	Aggregate Mono meter 0	82.688	4.134	86.822	HP0001
No	CO0000080	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	OFF001
No	CO0000081	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	TTA001
No	CO0000079	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HP0001
No	CO0000077	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HP0001
No	CO0000072	CEBT	Cost Per Copy	BT0B - Mono meter 2500	6.655	0.666	7.321	OFF001
No	CO0000072	CEBT	Cost Per Copy	BT0B - Mono meter 2500	10.000	1.000	11.000	HP0001
No	CO0000016	CEBT	Rental Contracts	BT0B - Mono meter 0	0.500	0.025	0.525	TTA001
No	CO0000012	FBTB	Prepaid Contract	BT0B - Service	-1,464.100	-146.410	-1,610.510	TTA001
No	CO0000019	FBTB	Cost Per Copy	BT0B - Bank Rental	423.500	42.350	465.850	OFF001
No	CO0000074	FBTB	Cost Per Copy	BT0B - Service	275.000	27.500	302.500	DER001
No	CO0000074	FBTB	Cost Per Copy	BT0B - Insurance	500.000	50.000	550.000	DER001
No	CO0000016	FBTB	Rental Contracts	BT0B - Insurance	300.000	15.000	315.000	TTA001
No	CO0000012	IFEE	Prepaid Contract	Service	1,691.036	169.104	1,860.139	TTA001
No	CO0000018	IFEE	Cost Per Copy	Service	1,468.189	146.819	1,615.008	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	1,076.671	107.667	1,184.338	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	512.701	51.270	563.971	SAM001
					27,130.29	2,503.68	29,633.97	

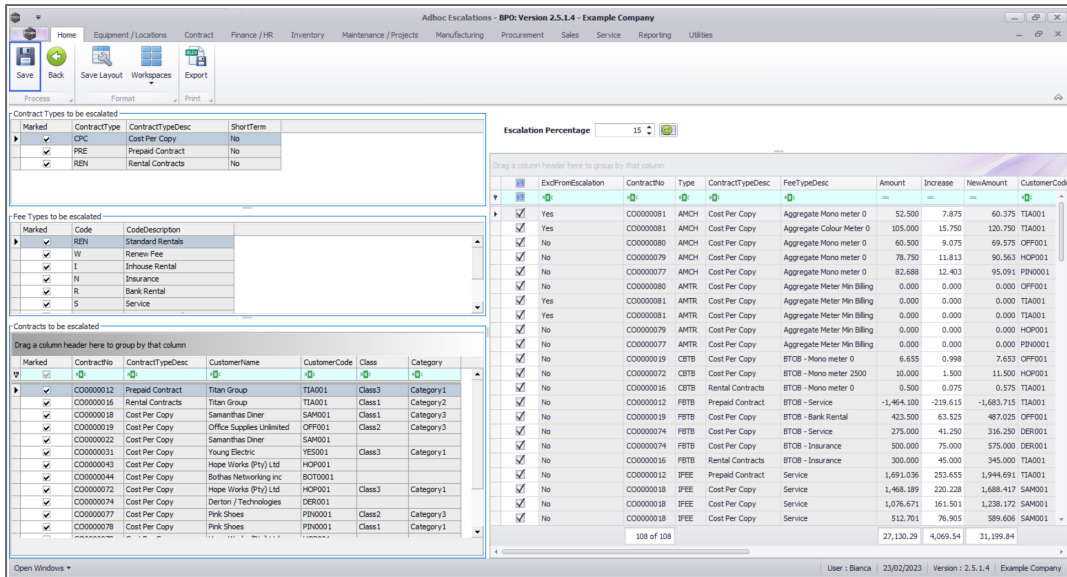
- Review the **Amount**, **Increase** and **New Amount** columns.
- You will see that the **15%** increase has been applied.

The screenshot shows the 'Adhoc Escalations' window with the 'Save' button highlighted. The data table shows updated values for the 'Amount', 'Increase', and 'New Amount' columns, reflecting the 15% escalation rate.

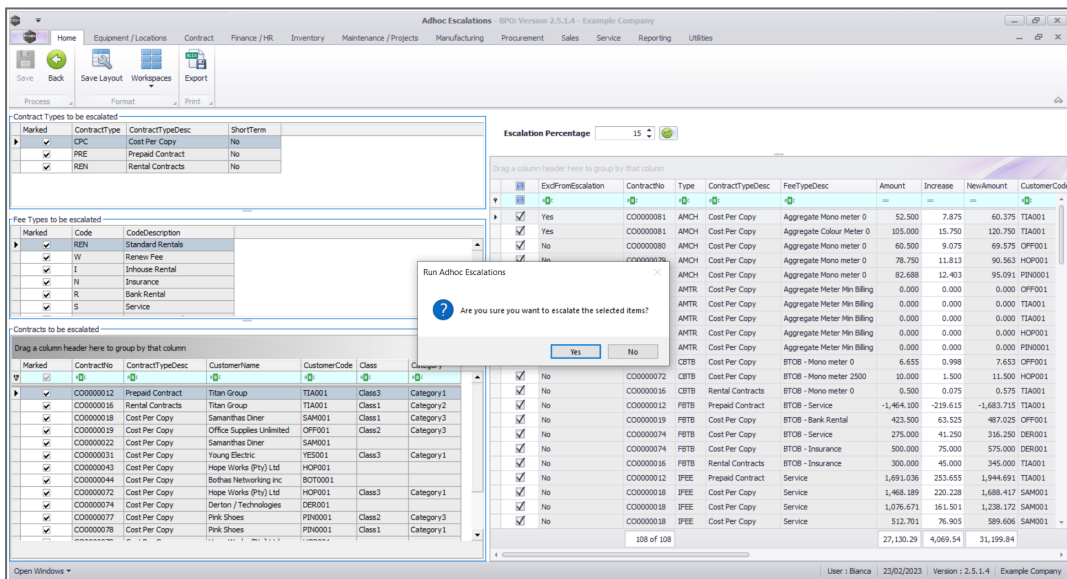
Escalation	ContractNo	Type	ContractTypeDesc	FeeTypeDesc	Amount	Increase	NewAmount	CustomerCode
Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Mono meter 0	52.500	7.875	60.375	TTA001
Yes	CO0000081	AMCH	Cost Per Copy	Aggregate Colour Meter 0	105.000	15.750	120.750	TTA001
Yes	CO0000080	AMCH	Cost Per Copy	Aggregate Mono meter 0	60.500	9.075	69.575	OFF001
Yes	CO0000079	AMCH	Cost Per Copy	Aggregate Mono meter 0	78.750	11.813	90.563	HP0001
Yes	CO0000077	AMCH	Cost Per Copy	Aggregate Mono meter 0	82.688	12.403	95.091	HP0001
No	CO0000080	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	OFF001
No	CO0000081	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	TTA001
No	CO0000079	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HP0001
No	CO0000077	AMTR	Cost Per Copy	Aggregate Meter Min Billing	0.000	0.000	0.000	HP0001
No	CO0000019	CEBT	Cost Per Copy	BT0B - Mono meter 0	6.655	0.998	7.653	OFF001
No	CO0000072	CEBT	Cost Per Copy	BT0B - Mono meter 2500	10.000	1.500	11.500	HP0001
No	CO0000016	CEBT	Rental Contracts	BT0B - Mono meter 0	0.500	0.075	0.575	TTA001
No	CO0000012	FBTB	Prepaid Contract	BT0B - Service	-1,464.100	-219.615	-1,683.715	TTA001
No	CO0000019	FBTB	Cost Per Copy	BT0B - Bank Rental	423.500	63.525	487.025	OFF001
No	CO0000074	FBTB	Cost Per Copy	BT0B - Service	275.000	41.250	316.250	DER001
No	CO0000074	FBTB	Cost Per Copy	BT0B - Insurance	500.000	75.000	575.000	DER001
No	CO0000016	FBTB	Rental Contracts	BT0B - Insurance	300.000	45.000	345.000	TTA001
No	CO0000012	IFEE	Prepaid Contract	Service	1,691.036	253.655	1,944.691	TTA001
No	CO0000018	IFEE	Cost Per Copy	Service	1,468.189	220.228	1,688.417	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	1,076.671	161.501	1,238.172	SAM001
No	CO0000018	IFEE	Cost Per Copy	Service	512.701	76.905	589.606	SAM001
					27,130.29	4,069.54	31,199.84	

SAVE ADHOC ESCALATIONS

- When you have finished making the adhoc escalation rate changes, click on **Save**.
- Note that only **marked** items will be escalated.



- A Run Adhoc Escalations message box will pop up asking;
 - Are you sure you want to escalate the selected items?
- Click on **Yes**.



- The selected escalations will be **saved** and the screen will close.

MNU.115.001