

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

CONTRACT

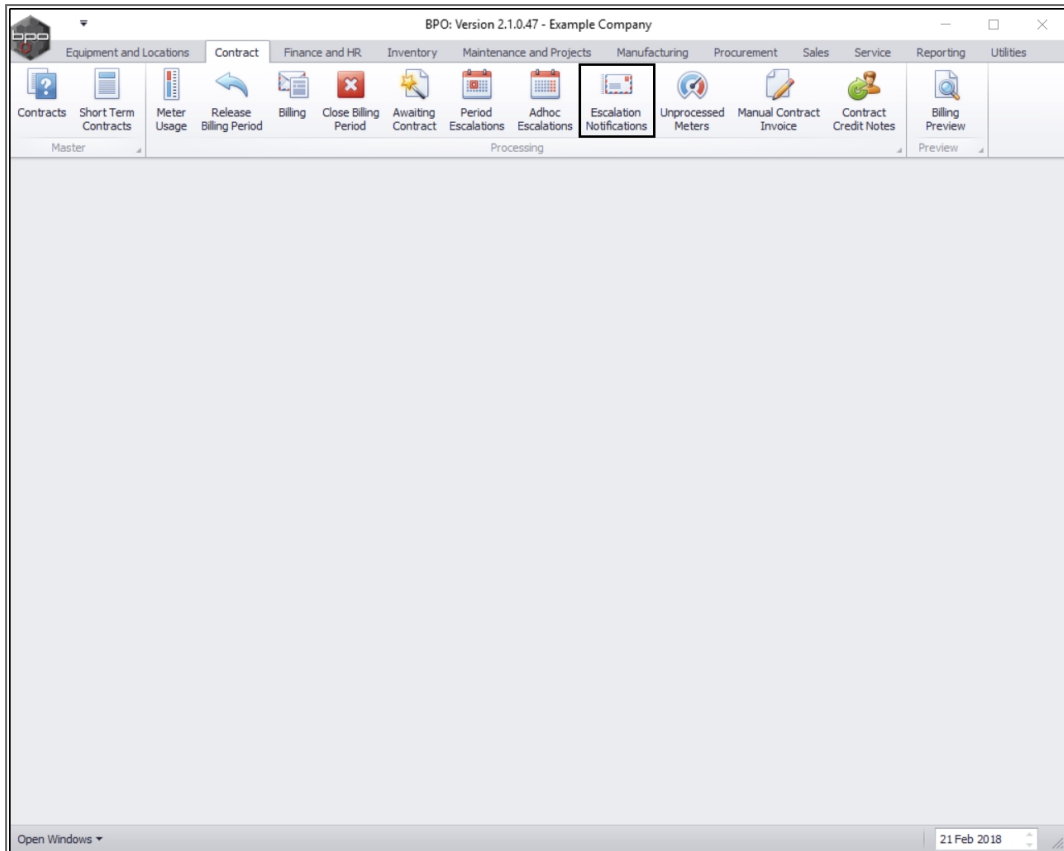
ESCALATION NOTIFICATIONS

The **Escalation Notification Service** must be installed, configured and running for this functionality.

The escalation notification screen lists all contracts due for escalations in **3** months time.

The Notification is sent to the **Customer Invoice Delivery method** contact person, configured on the Customer.

Ribbon Access: Sales > Orders



The **Escalation Notifications for []** screen will be displayed.

NOTIFICATION SCREEN OVERVIEW

This screen will list **all** the contracts that are due to escalate in **3** months time.

Escalation Notifications for July 2017 - BPO: Version 2.1.0.69 - Example Company

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

Save Save Layout Workspaces 31 Jul 2017 Print Export

Pro... Format State Print

Drag a column header here to group by that column

	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
<input checked="" type="checkbox"/>	C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
<input checked="" type="checkbox"/>	C00000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
<input checked="" type="checkbox"/>	C00000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
<input checked="" type="checkbox"/>	C00000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
<input checked="" type="checkbox"/>	C00000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1		5,00
<input checked="" type="checkbox"/>	C00000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Mar 2015	5,00
<input checked="" type="checkbox"/>	C00000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1		5,00
<input checked="" type="checkbox"/>	C00000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00
<input checked="" type="checkbox"/>	C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00

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SELECT CONTRACTS FOR NOTIFICATION

1. Click on the **check box** in the row of the **contract** where you wish to notify customers of any escalation.
2. Un-tick the check box in the row of the contract where you do not wish to notify the customer of any escalation.
3. You can also tick the **Select All** check box if you wish to notify customers for **all** contracts on the list or **un-tick** this check box if you do not wish to notify any customers.
4. When you have made your selections, click on **Save**.

ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
CO0000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
CO0000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
CO0000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
CO0000019	CPC	Cost Per Copy	OFF001	Office Supplies Unlimited	5	1		5,00
CO0000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1		5,00
CO0000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Mar 2015	5,00
CO0000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1		5,00
CO0000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00
CO0000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00

NOTIFICATION QUEUE

- A **Notification Process** message box will pop up informing you that;
 - The escalation notifications have been saved to the **Notification queue** for processing.
- Click on **OK**.

The screenshot shows the 'Escalation Notifications for July 2017 - BPO: Version 2.1.0.69 - Example Company' window. The main area contains a table with the following data:

	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
<input type="checkbox"/>	C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
<input type="checkbox"/>	C00000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
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<input checked="" type="checkbox"/>	C00000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1		5,00
<input checked="" type="checkbox"/>	C00000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00
<input checked="" type="checkbox"/>	C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3		5,00

A 'Notification Process' dialog box is displayed in the center, containing the following text:

i The escalation notifications have been saved to the notification queue for processing.

OK

The **Escalation Notifications** screen will refresh.

1. **All** the check boxes will be cleared.
2. The **Last Notification** column will be updated to display the date that the notification(s) were sent to the Notification queue.

	ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
	C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
	C00000016	CPC	Cost Per Copy	TIA001	Titan Group	5	1		5,00
	C00000018	CPC	Cost Per Copy	SAM001	Samanthas Diner	5	1	03 Feb 2015	5,00
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	C00000020	CPC	Cost Per Copy	HOP001	Hope Works	5	1	03 Feb 2019	5,00
	C00000022	CPC	Cost Per Copy	SAM001	Samanthas Diner	6	2	03 Feb 2019	5,00
	C00000041	CPC	Cost Per Copy	PAN001	Panda Copiers	5	1	03 Feb 2019	5,00
	C00000042	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00
	C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00

PRINT THE ESCALATION NOTIFICATION LETTER

1. Select the **row** of the **Contract No.** where you wish to view the **Notification letter**.
2. Click on **Print**.

Escalation Notifications for July 2017 - BPO: Version 2.1.0.69 - Example Company

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

Save | Save Layout | Workspaces | 31 Jul 2017 | Print | Export

Pro... | Format | State | Print

Drag a column header here to group by that column

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<input type="checkbox"/>	C00000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
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<input checked="" type="checkbox"/>	C00000043	CPC	Cost Per Copy	HOP001	Hope Works	7	3	03 Feb 2019	5,00

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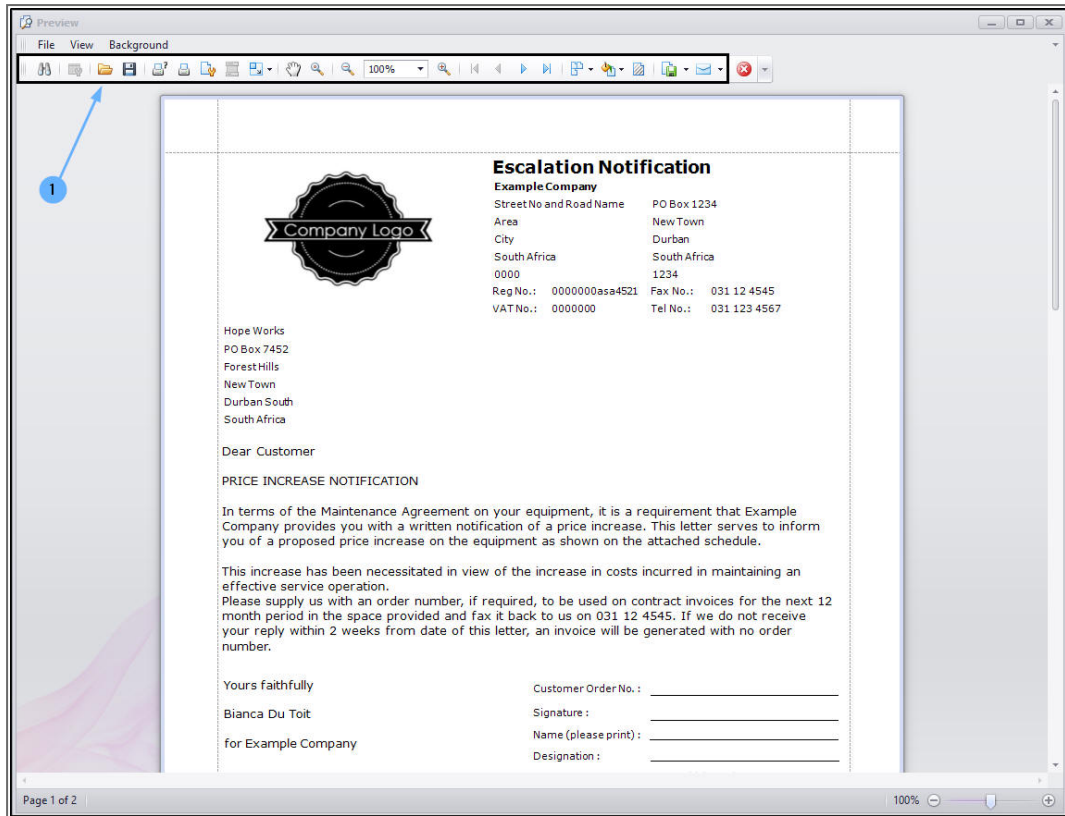
- A **Report Generation** message box will pop up asking;
 - Do you want to view the escalation notification of []?
- Click on **Yes**.

ContractNo	ContractType	ContractTypeDesc	CustomerCode	CustomerName	EscalationPeriod	MonthsDue	LastNotification	EscalationRate
CO0000012	REN	Rental Contracts	TIA001	Titan Group	5	1		5,00
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ESCALATION NOTIFICATION LETTER (PAGE 1 EXAMPLE)

The **Report Preview** screen will be displayed.

1. From here you can **View**, **Print**, **Export** or **Email** the Escalation Notification.



ESCALATION NOTIFICATION LETTER (PAGE 2 EXAMPLE)

2. In this second page, you can view the **Charge Description**, as well as the **Old Charge** amount and the **New Charge** amount.
3. **Close** the screen when you are done.

Escalation Notification
Example Company
 Street No and Road Name PO Box 1234
 Area New Town
 City Durban
 South Africa South Africa
 0000 1234
 Reg No.: 0000000asa4521 Fax No.: 031 12 4545
 VAT No.: 0000000 Tel No.: 031 123 4567

Hope Works
 PO Box 7452
 Forest Hills
 New Town
 Durban South
 South Africa

ATTACHMENT TO PRICE INCREASE NOTIFICATION - EQUIPMENT LISTING
All rates quoted exclude VAT

Contract No.: CO0000043
Effective Month: 7
Account No.: HOP001

Model No.: ZN122
Serial No.: 12-98765
Tag No.: AREG000061
Location: Reception

Contact: Mandy Jefferson
Contact No.: 031 255 1234
Customer: Hope Works
Address: Plot 91 Leaf Road
 Forest Hills
 New Town
 Durban South

Charge Description	Old Charge	Rate %	New Charge
Fees	250.00	5.00	262.50

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