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

CONTRACT

ADD CONTRACT ITEM INCLUSIONS

You will be following the process below to add each item to be linked to this contract, where Inclusions apply.

Item Inclusions Frame

- Click on the **Item Inclusions** tab.

The **Item Inclusions** frame will be expanded.

- In the **Item Inclusions** frame, you can add all **.png Inclusions** (items which are included in the .png and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically "included" in the .png and are covered by a set .png fee agreed between the customer and service provider.
- Although they are included, you can have a breakdown of each individual inclusion. This breakdown is achieved by utilising the Link Fee panel within the Item Inclusion panel. For more information, refer to the Link Fee topic.

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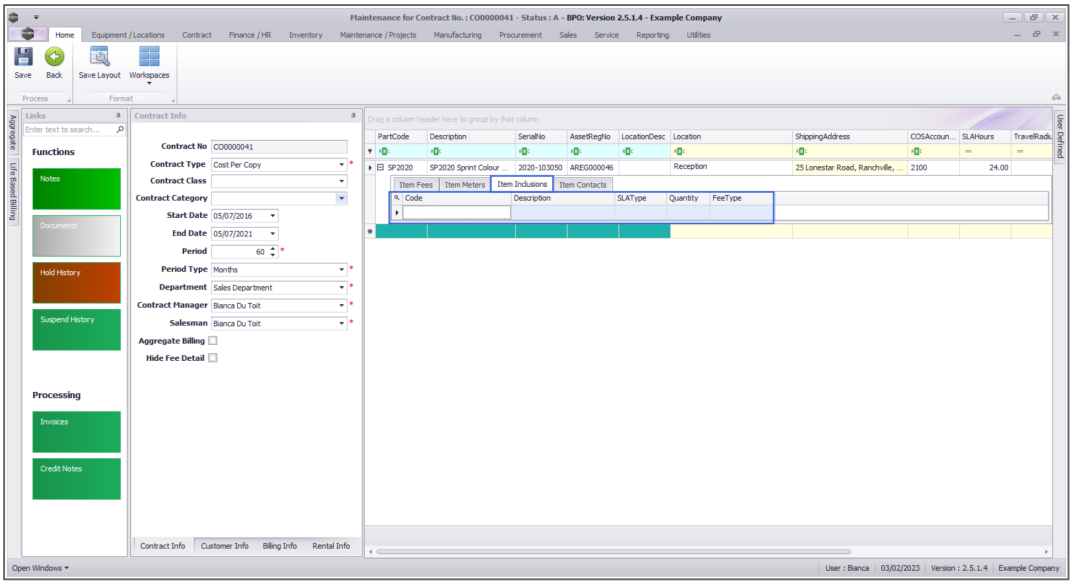

Add Item Inclusions

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- A **Process** menu will pop up with the following options:
    - **Part:**Add Part Inclusion
    - **BOM:**Add Bill Of Materials Inclusion
    - **Craft:**Add Craft Inclusion
    - **Service:**Add Service Inclusion
    - **Link Fee:**Link A Fee To An Inclusion
    - **Delete:**Delete Inclusion

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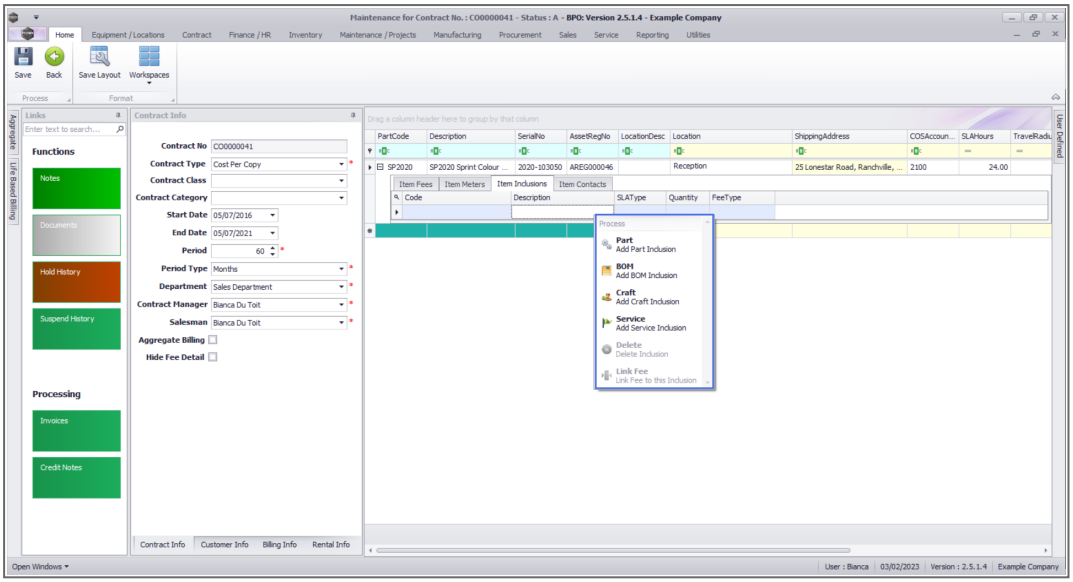
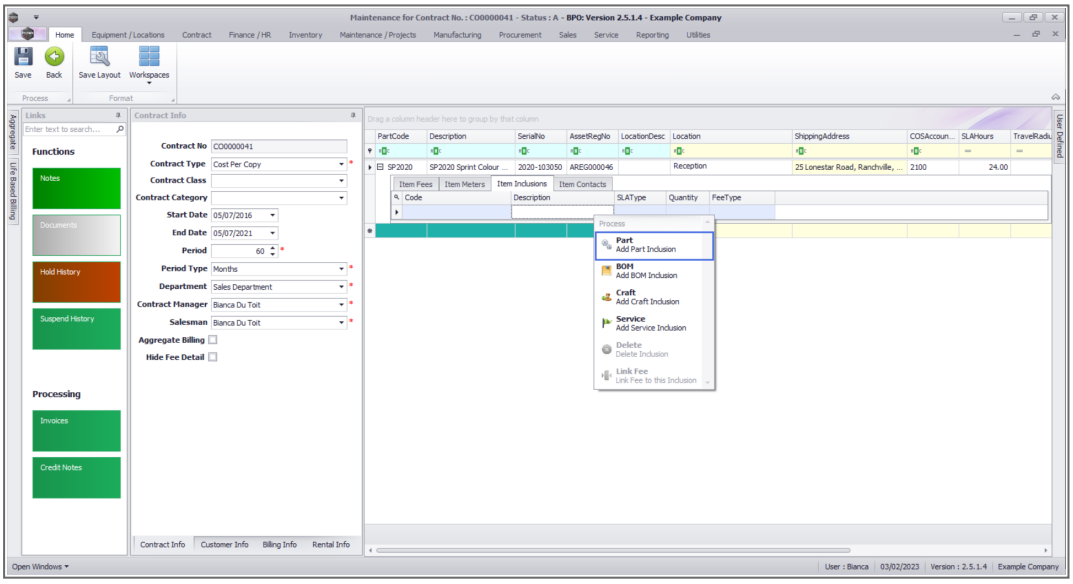


Add Part Inclusion

- Click on **Part** - Add Part Inclusion.



- An **Input Validation** message box will pop up asking:
  - **Are you sure you want to add a part inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.

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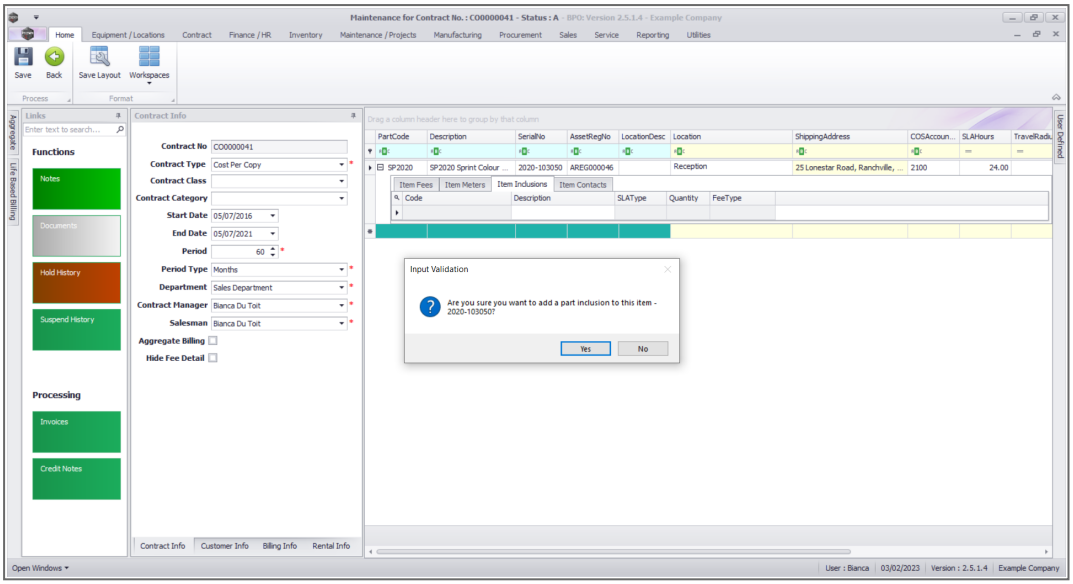
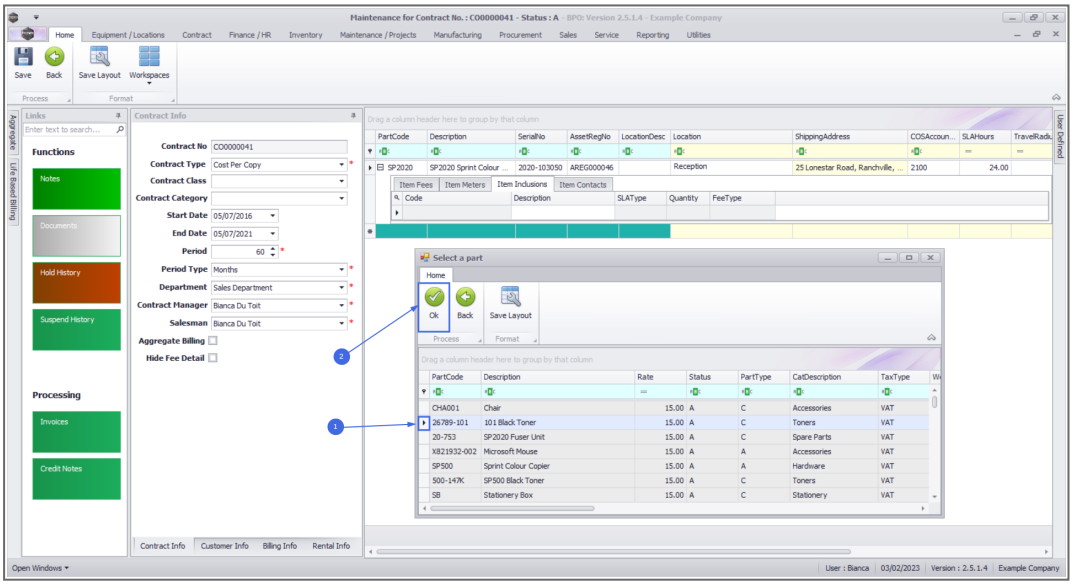


- A **Select a part** screen will pop up.
- Click on the **row selector** in front of the **part** you wish to **add** to this .png as an **inclusion**
- Click on **Ok**.



- The selected part will be **added** to the **Item Inclusion** frame.

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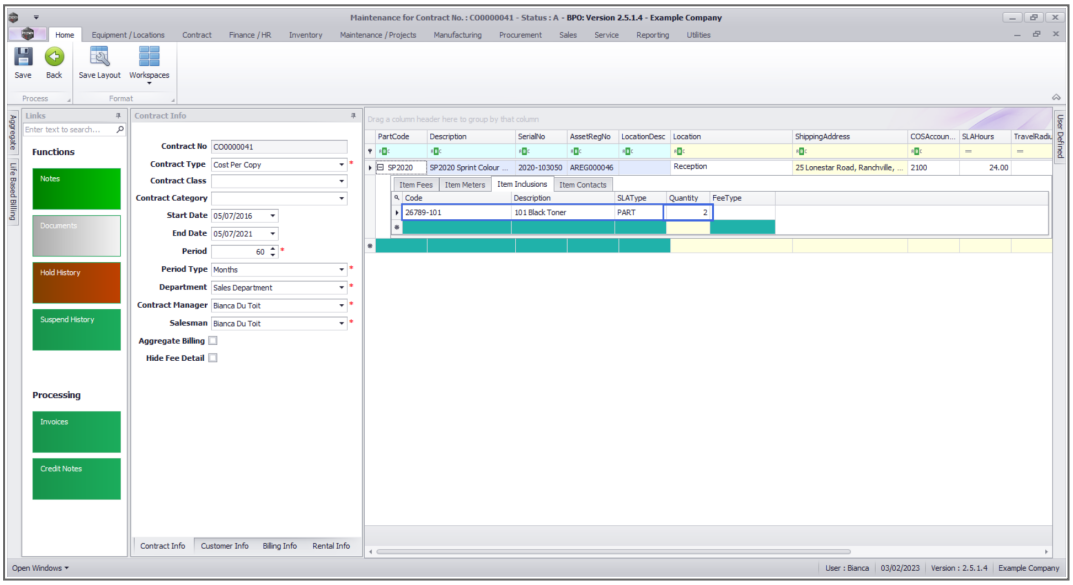
- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected part.
- **Fee Type:** This field will only be populated if you link a fee to the inclusion.



Add Bill of Materials Inclusion

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **BOM** - Add BOM Inclusion.

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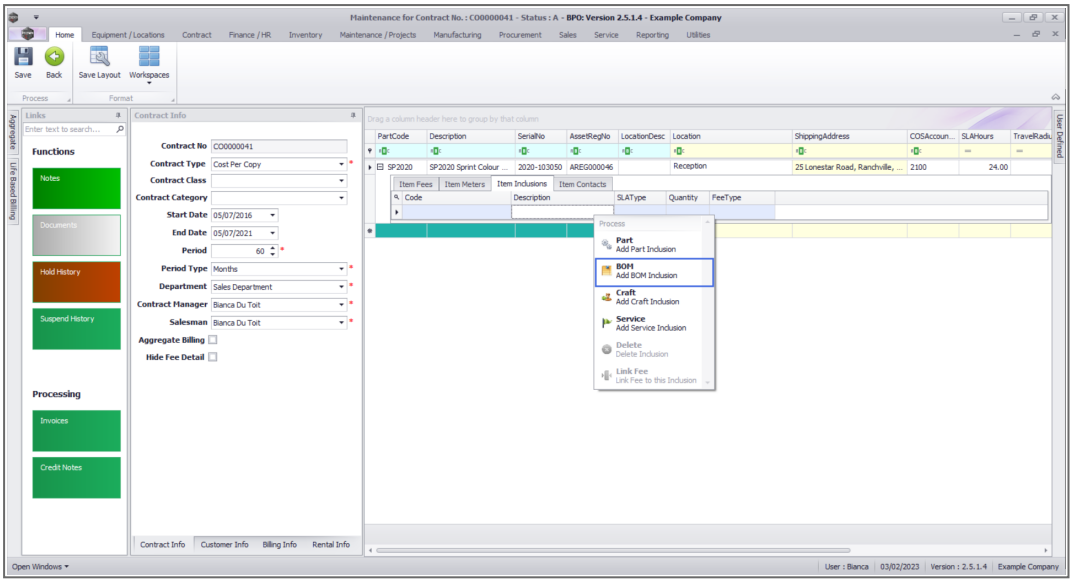
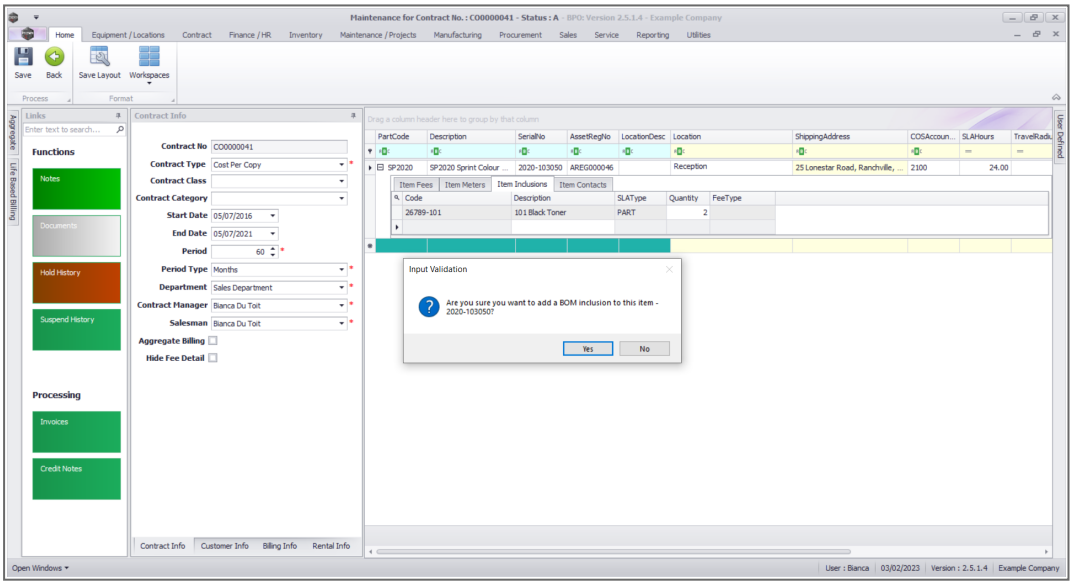


- An **Input Validation** message box will pop up asking:
    - **Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??**
- Click on **Yes**.



- A **Select a bill of material** screen will pop up.
- Click on the **row selector** in front of the **BOM** you wish to **add** to

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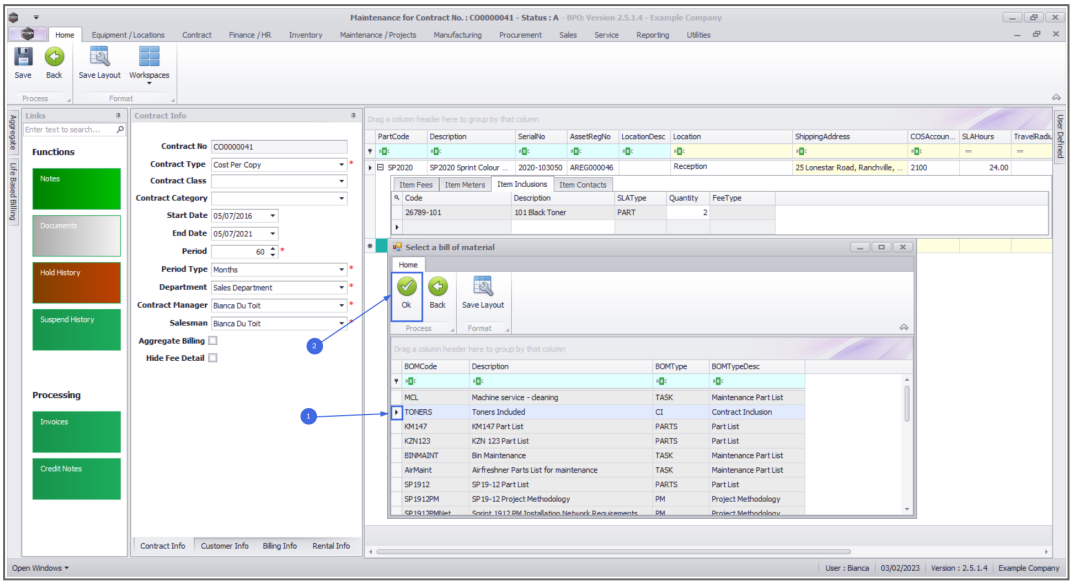
this .png as an **inclusion**.

- Click on **Ok**.



- The selected **BOM** will be added to the **Item Inclusions** frame.
- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected BOM.
- **Fee Type:** This field will only be populated if you link a fee to the inclusion.

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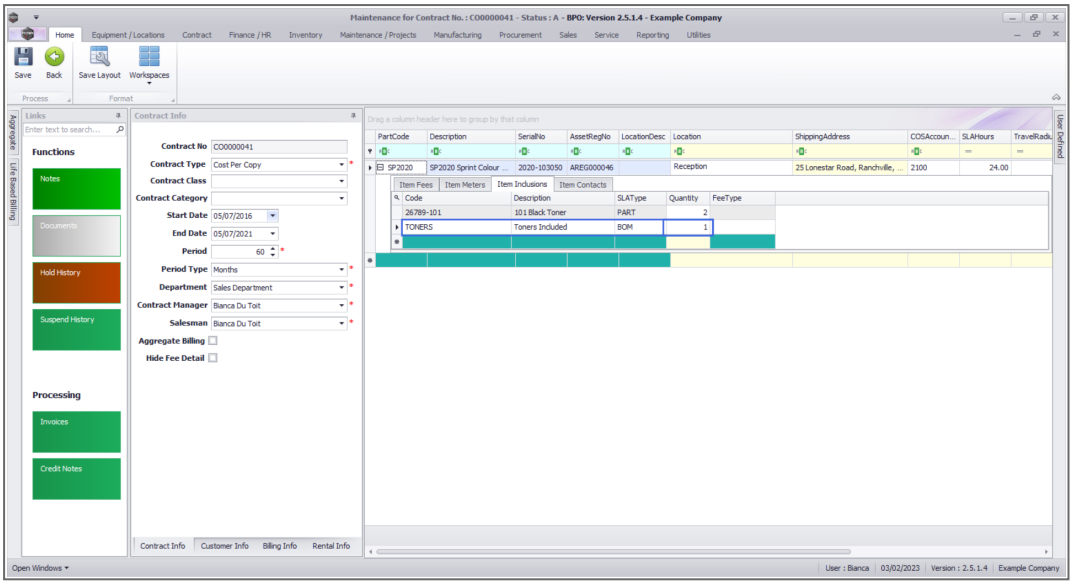
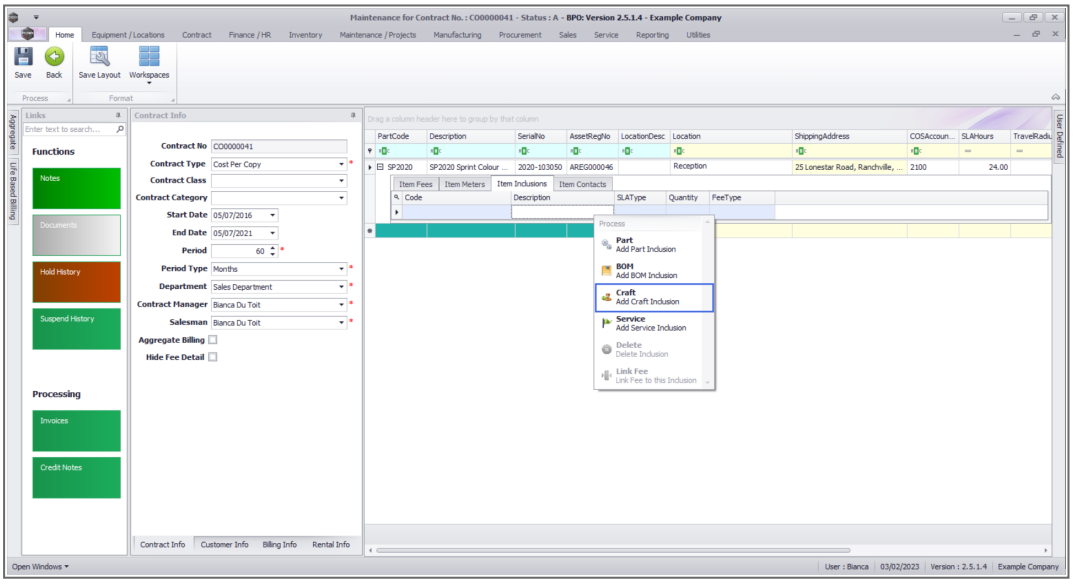


Add Craft Inclusion

- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** - Add Craft Inclusion.



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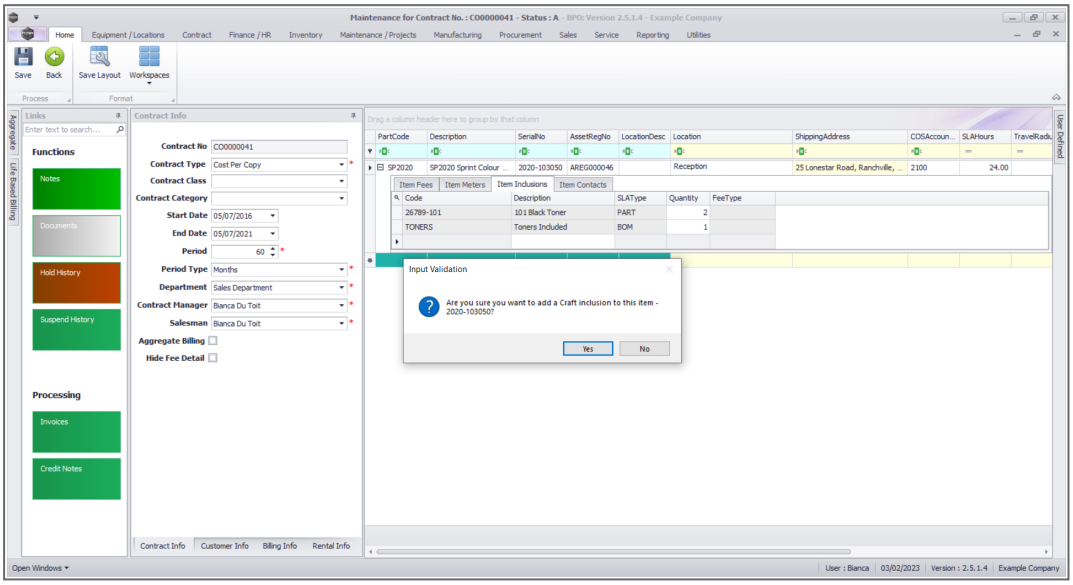
- An **Input Validation** message box will pop up asking:
    - **Are you sure you want to add a Craft inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



- A **Select a craft** screen will pop up.
- Click on the **row selector** in front of the **craft** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.

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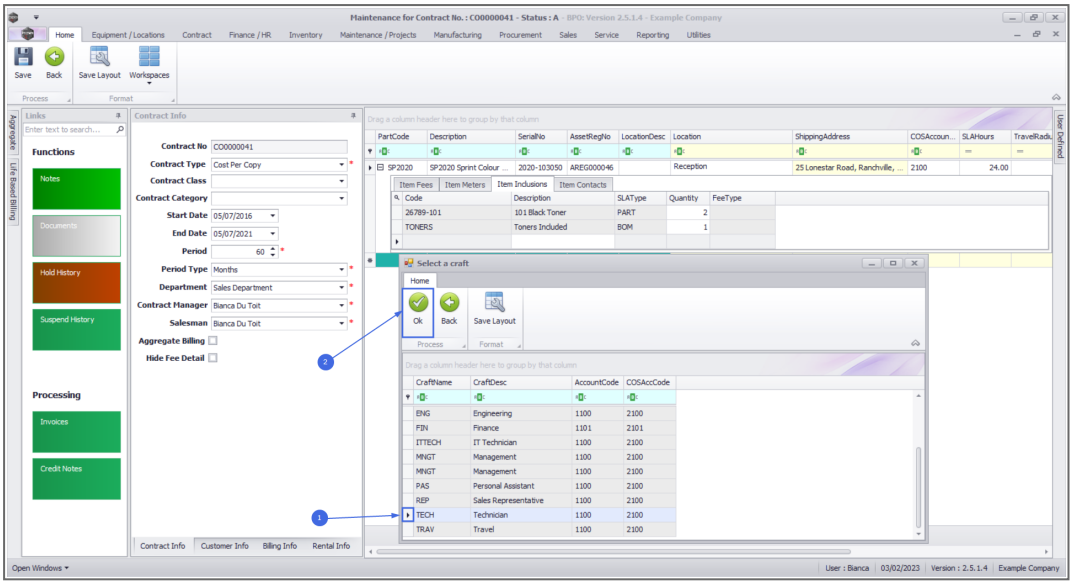

- The selected **Craft** will be added to the **Item Inclusions** frame.
    - **Code:** This field will auto populate with the code of the selected item.
    - **Description:** This field will auto populate with the description of the selected item.
    - **SLA Type:** This field will auto populate with the SLA type of the selected item.
    - **Quantity:** Type in the number of hours included for the selected Craft.
    - **Fee Type:** This field will only be populated if you link a fee to the inclusion.

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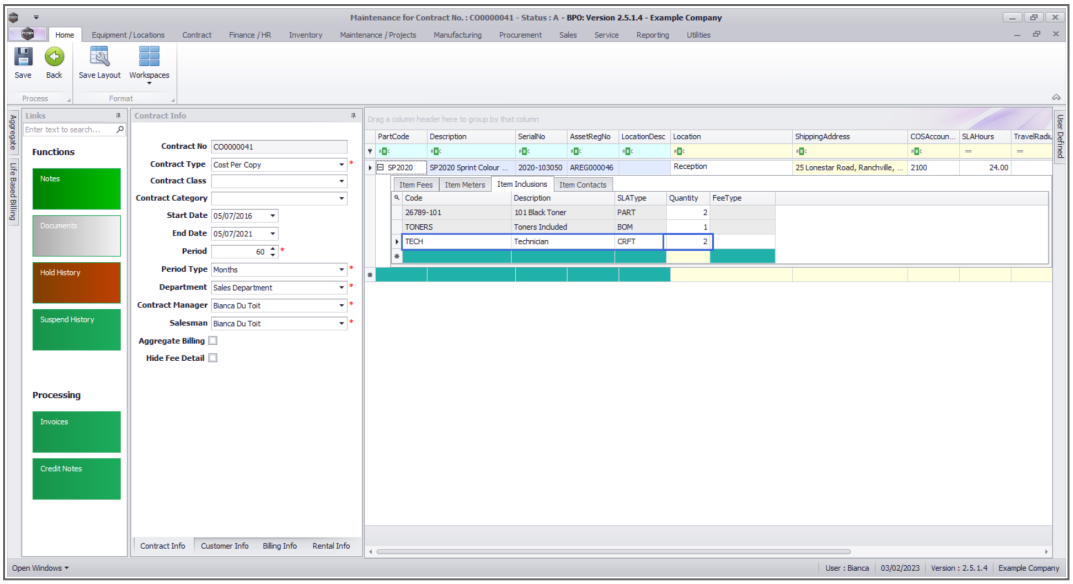
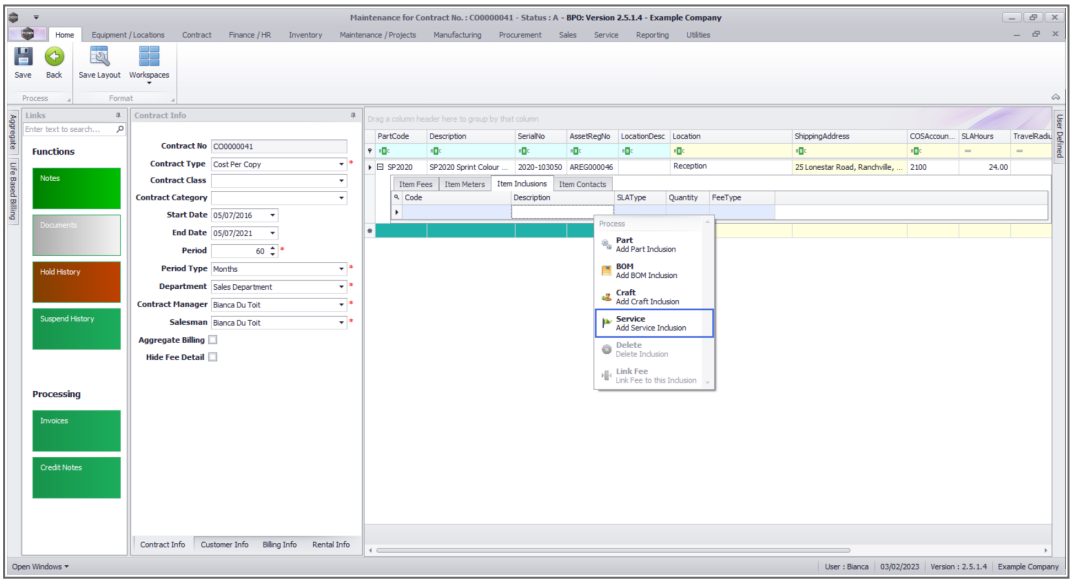


Add Service Inclusion

- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **Service** - Add Service Inclusion.



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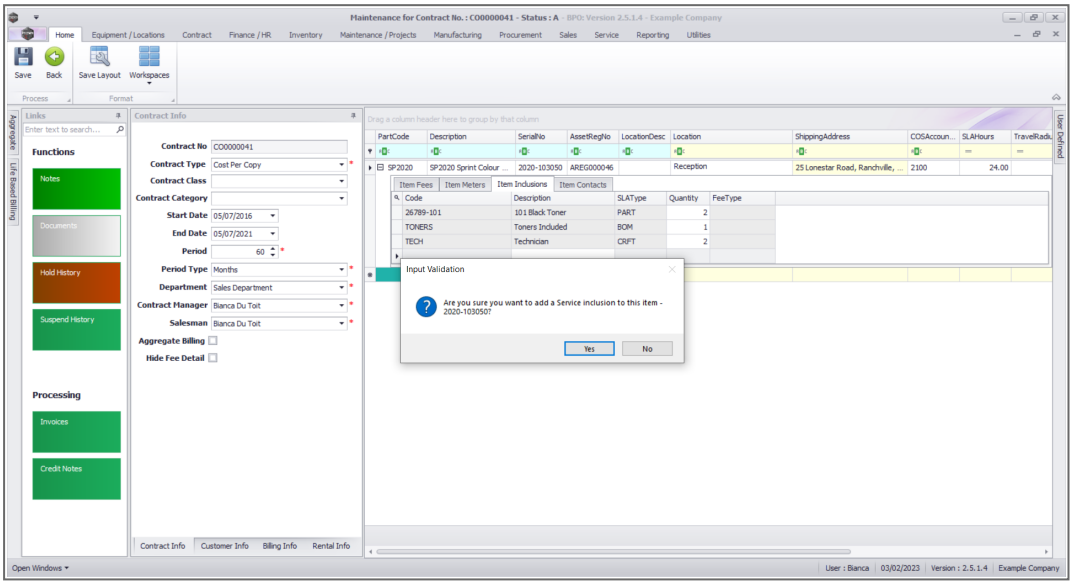
- An **Input Validation** message box will pop up asking:
    - **Are you sure you want to add a Service inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



- A **Select a service** screen will pop up.
- Click on the **row selector** in front of the **service** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.

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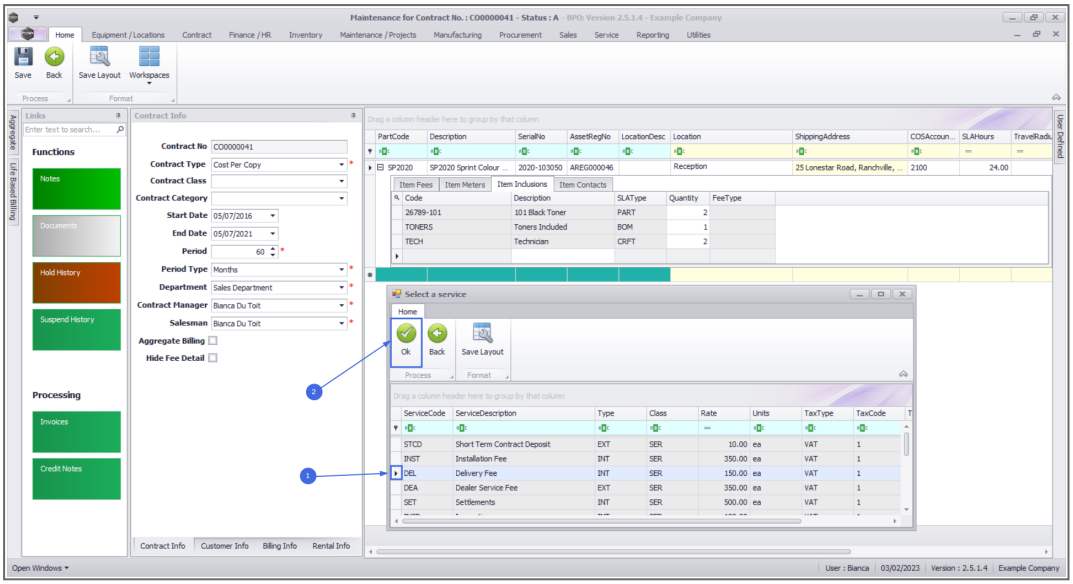

- The selected **Service** will be added to the **Item Inclusions** frame.
    - **Code:** This field will auto populate with the code of the selected item.
    - **Description:** This field will auto populate with the description of the selected item.
    - **SLA Type:** This field will auto populate with the SLA type of the selected item.
    - **Quantity:** Type in the quantity included for the selected Service.
    - **Fee Type:** This field will only be populated if you link a fee to the inclusion.

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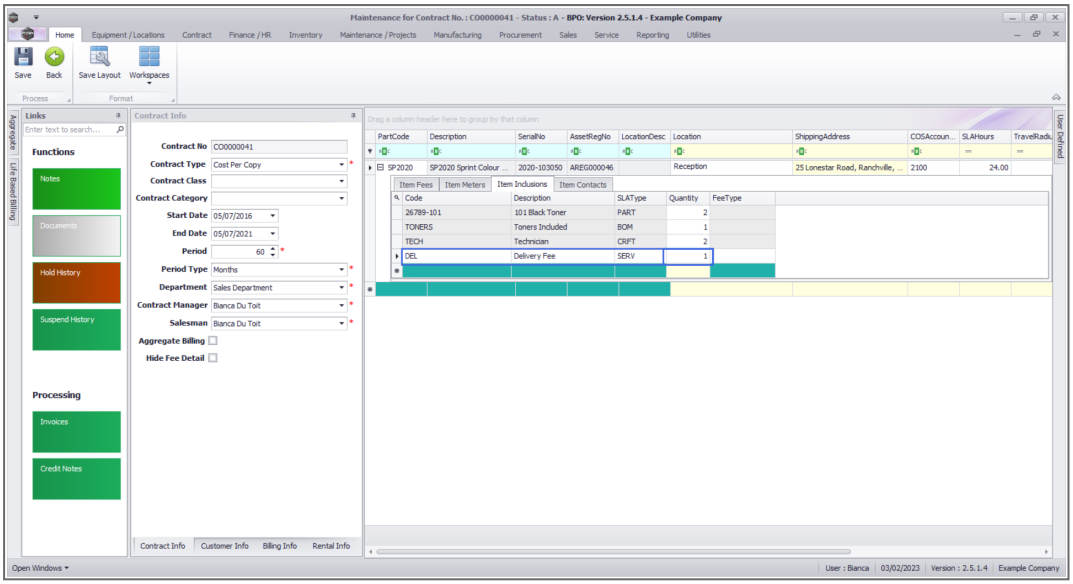

- **Note:** You can add more than one of each type of item inclusion to the .png.

Link a Fee to an Inclusion

- **Right click** in the **row** of the **item inclusion** that you wish to **link a fee** to.
    - In this image **IT Technician** has been selected.
- The **Process** menu will pop up.
- Click on **Link Fee** - Link Fee to this Inclusion.

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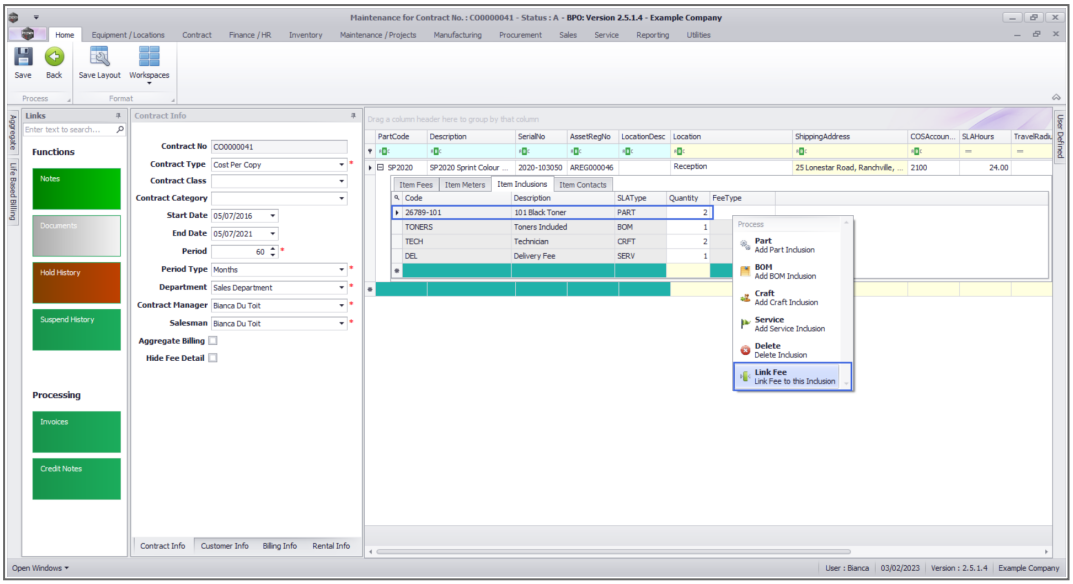
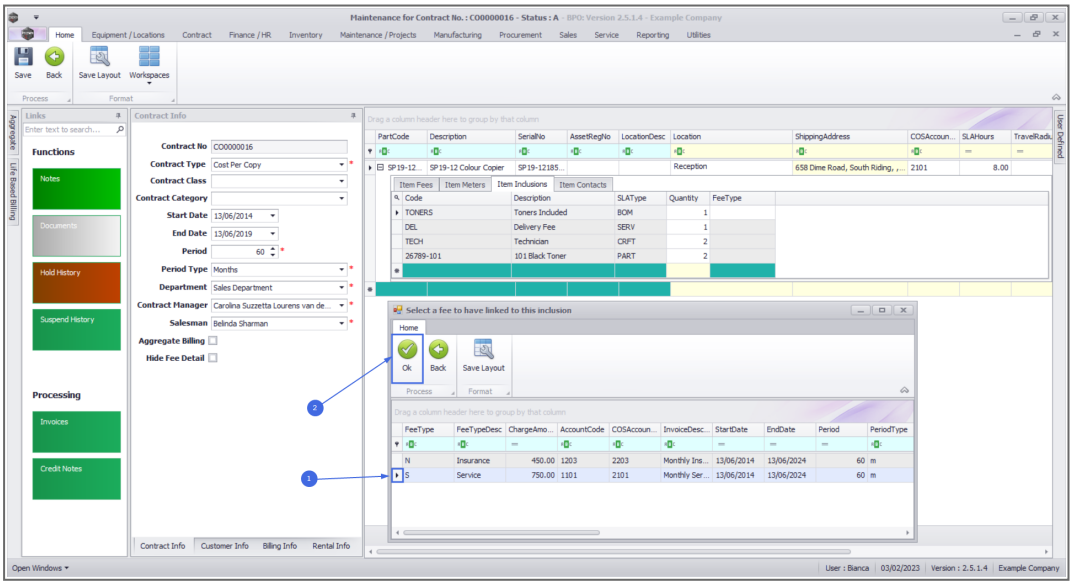


- A **The Fee Lookup List** screen will pop up.
- Click on the **row selector** in front of the **fee** you wish to **add** to this **inclusion**.
- Click on **Ok**.
    - **Note:**Only the fees that you selected in the Item Fees Frame will be displayed in this screen, and the fee can only be linked to one inclusion.



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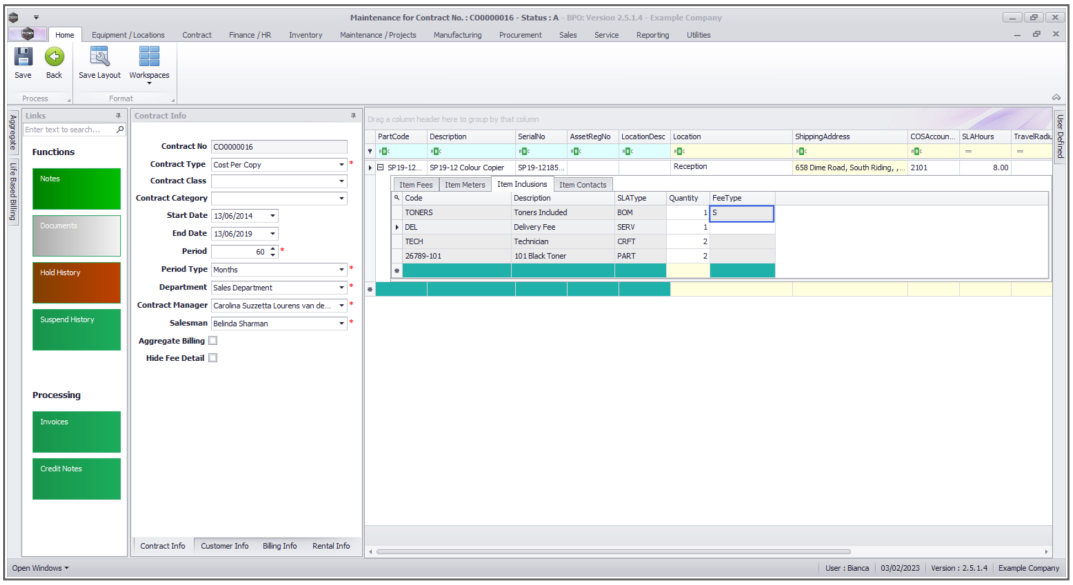
- The **The Fee Type** field will be populated with the selected fee type.
    - In this image, **S** - Service was selected, since the selected inclusion is covered by the Service Fee, in this example.



View the linked Inclusion on the Fee Detail

Note: that for this step you will need to save the .png first and then come back to view the Fee's linked Inclusion.

- Click on the **Item Fees** frame.
- Click on the **Expand** button on the fee you linked to an inclusion.
- The **Fee Inclusions** frame will be displayed.
- You can now view the details of the inclusion.
- You can change the **Quantity** of the inclusion in this frame if required.

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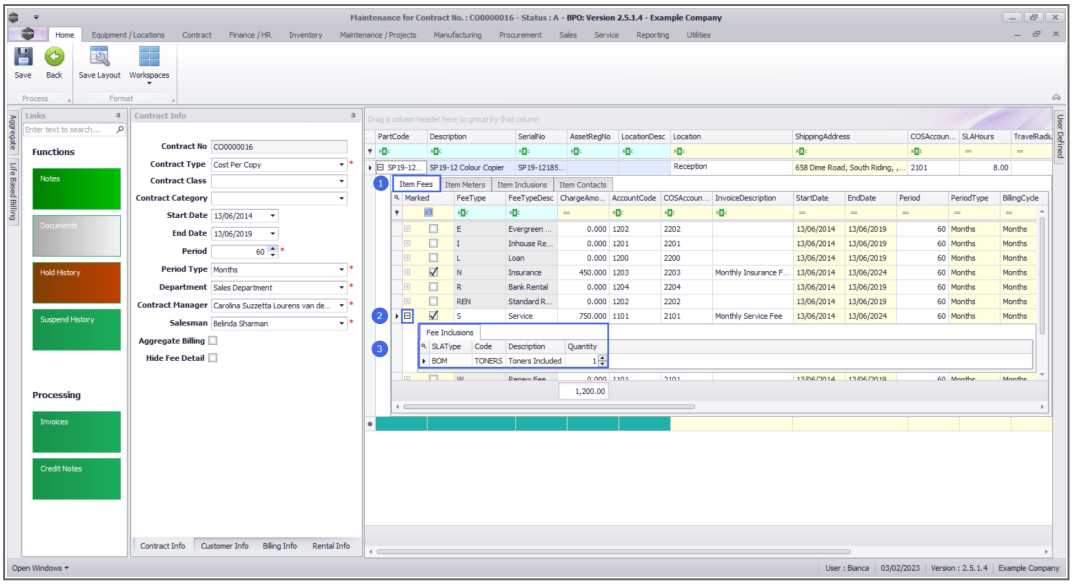

Delete Inclusion

- Another option in the **Item Inclusions Process** menu is **Delete** Inclusion.
- **Right click** in the **row** of the **item inclusion** that you wish to **delete** from the .png.
    - In this image **INST** - Installation Fee has been selected.
- The **Process** menu will pop up.
- Click on **Delete** - Delete Inclusion.

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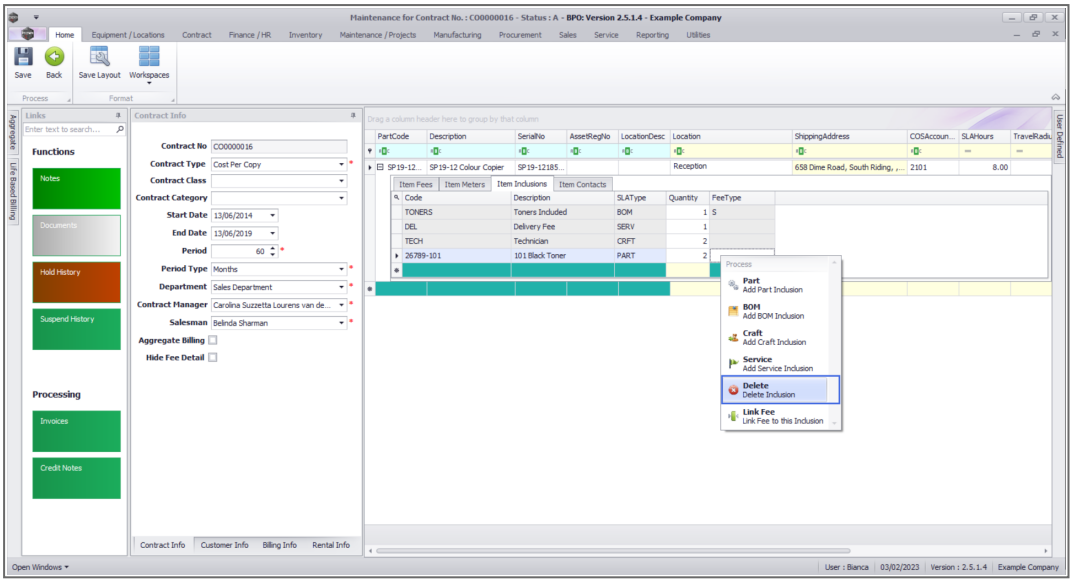
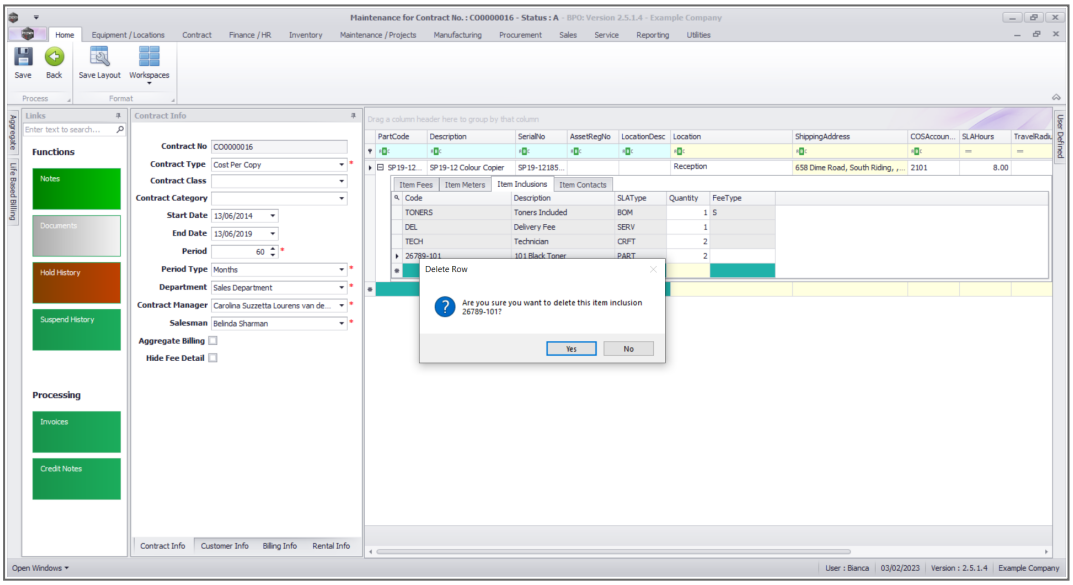


- An **Input Validation** message box will pop up asking:
    - **Are you sure you want to delete this item inclusion - [Serial Number or Location Description]?**
- Click on **Yes**.



- The selected item will now be **removed** from the **Item Inclusions** frame.

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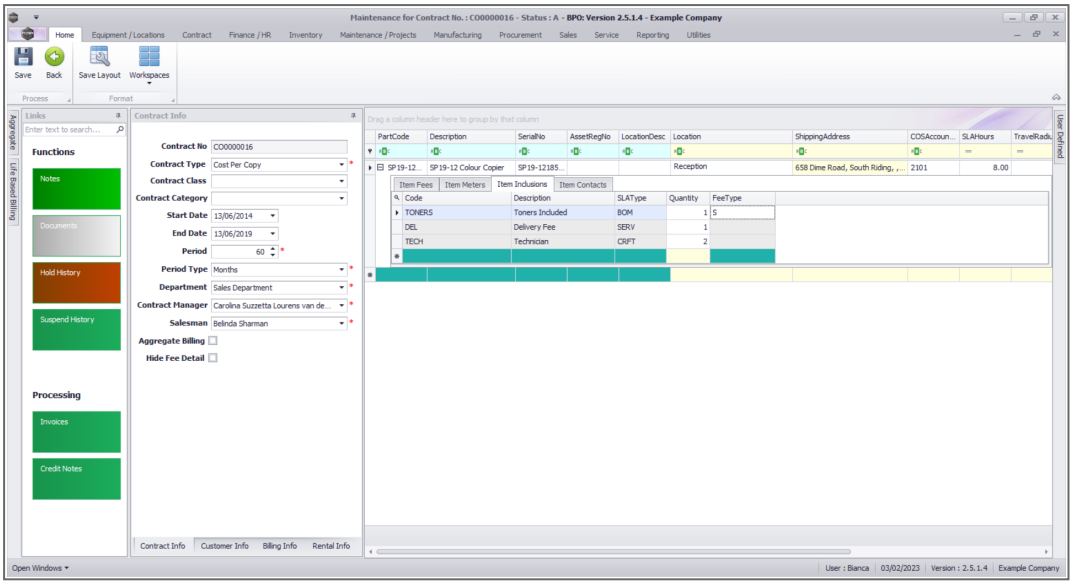

Next: Link Contract Item Contacts

NUCL.CTRT.004.008

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