

CONTRACT

CLOSE CONTRACT

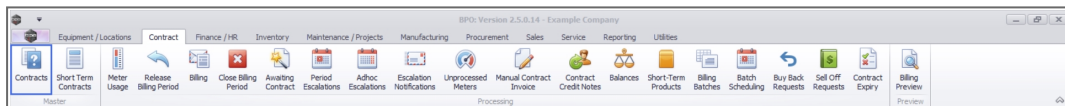
When a contract comes to an end, the contract must be closed and approved.



Refer to "[The Contract Expiry Listing Screen](#)" on [page 1](#) for more information relating to efficiently managing contract closure for contracts that are about to expire.

SELECT THE CONTRACT TO CLOSE

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.

Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save Layout

Workspaces

Save Filter

Format

Hold

Suspend

Release

Release For Approval

Remove From Approval

Approve Contract

Approve Closure

Decline Closure

Close Contract

Processing

Status Processing

Links

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Contract Listing

BPO: Version 2.5.0.14 - Example Company

Durban

Active

Refresh

Find Serial No.

Find Contract

Print

Export

Reports

Current

Print

Repo...

Drag a column header here to group by that column

ContractNo	CustomerC	CustomerName	CustomerO	ContractType	ContractTy	Location	OrderNo	StartDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bills
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months	Months		3
CO000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	Months		4
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	Months		5
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60 Months	Months	Bi-annual		6
PC000001	DAN002	Dancing Shoes		PBE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months	Months		1
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hlorest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months		1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months	Months		5
CO000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months	Months		7
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Months	Quarterly		5
CO000052	HOP001	Hope Works (Pty) Ltd		PBE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months	Months		3
CO000054	APP0001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months	Months		0
CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	Months		2
CO000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	Months	Months		0
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	Months		6
CO000077	PR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months		4
CO000078	PR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months		4
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2020	06/05/2020	Sales Depart...	60 Months	Months	Months		2
CO000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months	Months		7
CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months		4
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months	Months		8

Open Windows

User : BiancaD | 21/10/2022 | Version : 2.5.0.14 | Example Company

- Select the **row** of the **contract** that you wish to process.

Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

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CLOSE CONTRACT

Click on **Close Contract**.

My Close Contract button is greyed out:

- The contract must be in status **Active**.
- You must have the **security rights** to use this feature.

ContractNo	CustomerC	CustomerName	ContractType	ContractFY	Location	OrderNo	StartDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillTo
CO000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart.	60	Months	Monthly	3	
CO000008	TS001	Titan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart.	60	Months	Monthly	4	
CO000008	SAP001	Samarthas Diner	CPC	Cost Per Co.	Main		06/07/2014	06/07/2019	Sales Depart.	60	Months	Monthly	5	
CO000009	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart.	60	Months	Bi-annual	6	
PC000001	DA002	Dancing Shoes	RSE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart.	60	Months	Monthly	1	
CO000001	YEO001	Young Electric	CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart.	60	Months	Monthly	1	
CO000004	PA001	Panda Capers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart.	60	Months	Monthly	5	
CO000004	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		07/06/2016	07/06/2021	Sales Depart.	60	Months	Monthly	7	
CO000004	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		01/06/2016	07/06/2021	Sales Depart.	60	Months	Quarterly	5	
CO000002	HOP001	Hope Works (Pty) Ltd	RSE	Prepaid Con.	Durban Area		26/05/2017	26/05/2022	Sales Depart.	60	Months	Monthly	3	
CO000004	APP0001	Apple Juice Inc	CPC	Cost Per Co.	Durban Area		03/06/2017	03/06/2022	Sales Depart.	60	Months	Monthly	0	
CO000002	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart.	60	Months	Monthly	2	
CO000003	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		26/05/2018	26/05/2023	Sales Depart.	60	Months	Monthly	0	
CO000004	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart.	60	Months	Monthly	6	
CO000007	PP0001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart.	60	Months	Monthly	4	
CO000007	PP0001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart.	60	Months	Monthly	4	
CO000006	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Durban Area	1234	06/05/2017	06/05/2022	Sales Depart.	60	Months	Monthly	2	
CO000006	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2024	Sales Depart.	60	Months	Monthly	7	
CO000007	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart.	60	Months	Monthly	4	
CO000003	WES001	Westwood Dynamic	CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart.	60	Months	Monthly	8	

The **Closure Comments** dialogue screen will open.

- Type in the **reason** for closing the contract.
- Click on **Save**

Closure Comments

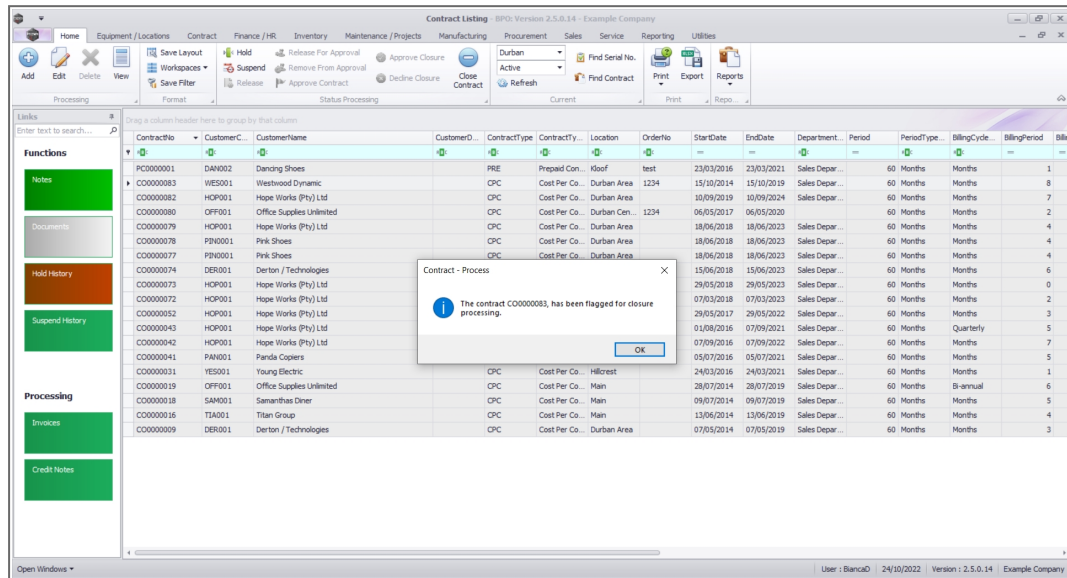
Contract has come to the end of its term. This contract will not be extended. Client will be signing a new contract.

Home Save Back

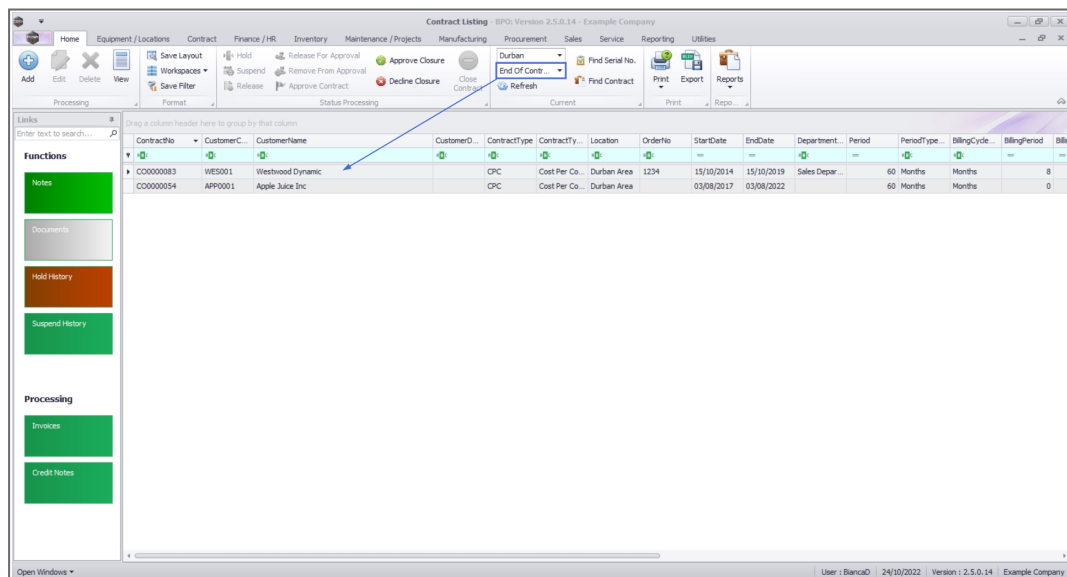
A **Contract - Process** message box will display, informing you that:

The contract [contract number, has been flagged for closure processing.

- Click on **Ok**.



- The contract status will be set to **End of Contract** and can be found via the End of Contract status filter on the Contract Listing screen.



Refer to "Approve Contract Closure" on page 3 to complete the closure process.

BPO2.CTRT.MNGT.0001

