

# PROJECTS

## PROJECTS – FOR CONTRACT

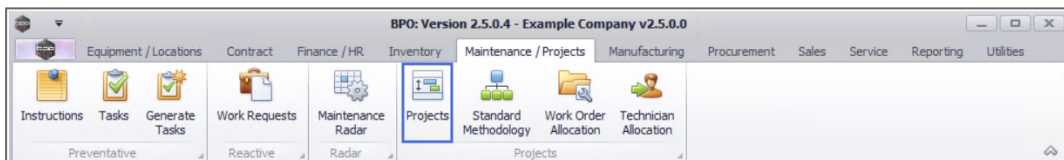
This screen displays items linked to the selected project that have been processed, but still need to be linked to a new or existing contract. The items displayed can be:

- A or B-class **internal assets** issued (**New Deal Rental**)
- A or B-class **serialised stock** invoiced and issued (**New Deal Sale**)

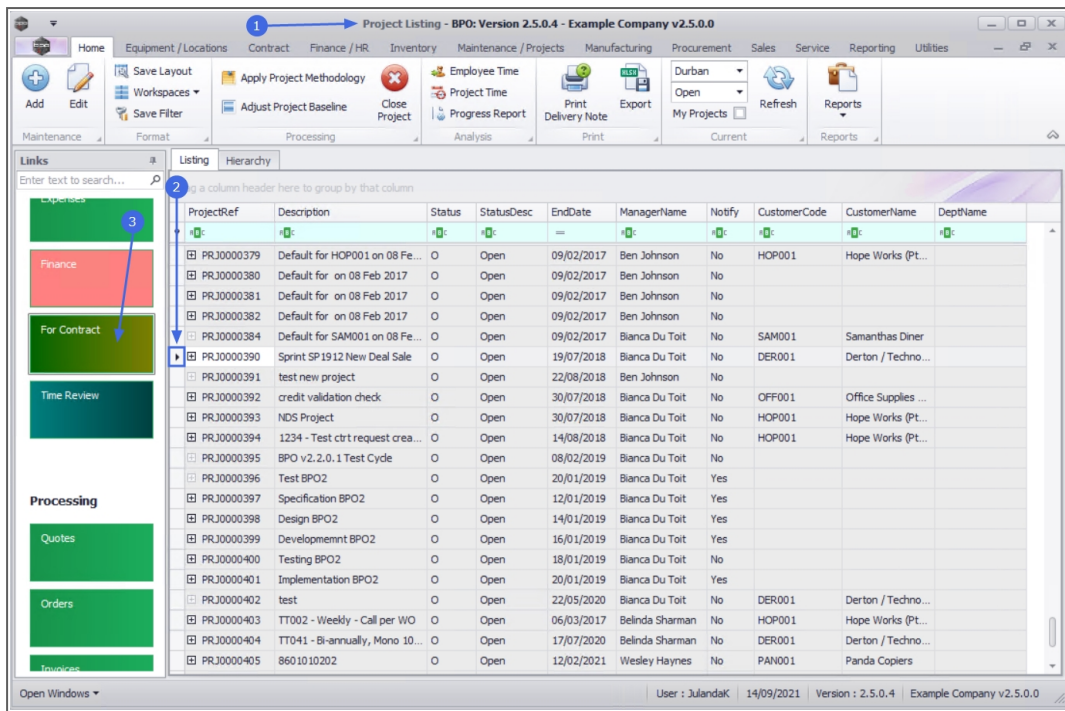
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**Ribbon Access:** *Maintenance / Projects > Projects*

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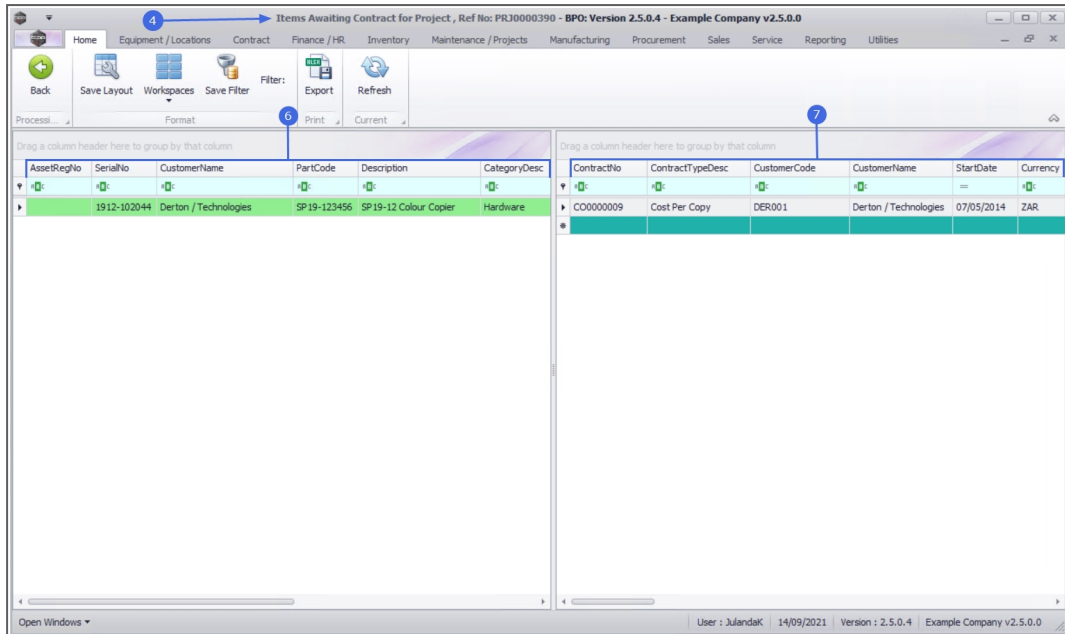
1. The **Project Listing** screen will be displayed.
2. Click on the **row** of the project that has item(s) waiting to be linked.
3. Click on the **For Contract** tile.



4. The **Items Awaiting Contract for Project , Ref No: [project ref number]** screen will be displayed.
5. This screen is divided into **2** data grids:
6. **Data grid 1:** displays all the items linked to the selected project **waiting** to be allocated to a contract. These items can either be **client** assets or **internal** assets. For internal assets to be displayed, a **New Deal Project** process has to be completed first.
7. **Data grid 2:** displays all the existing contracts for the **customer** linked to the project.



*Deleted or Closed* contracts will not display on this screen.

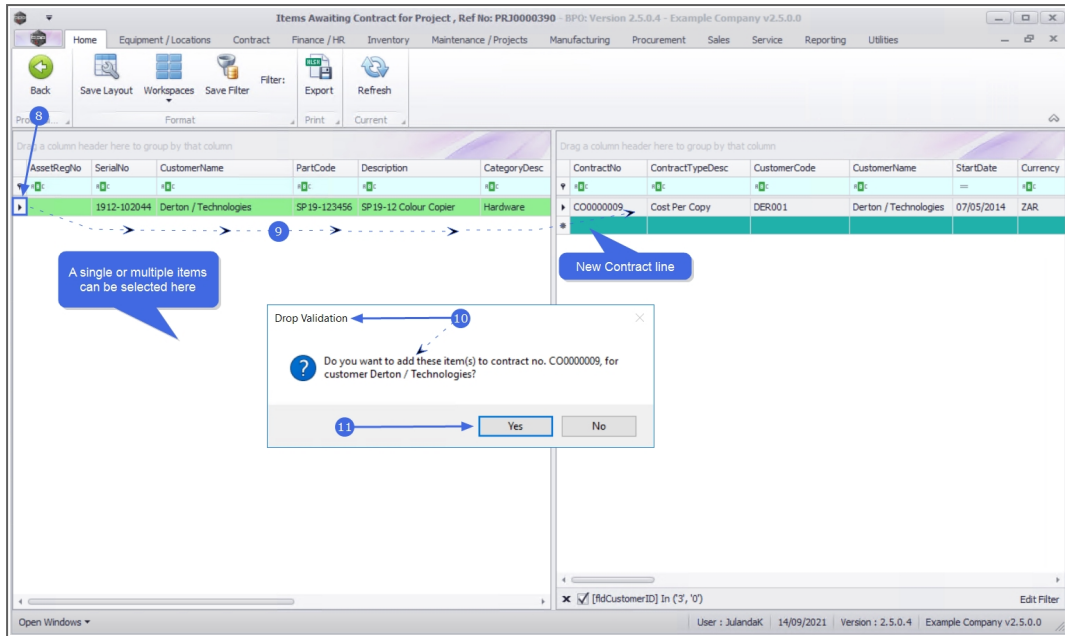


## LINK ITEM(S) TO CONTRACT

8. "Select Multiple Item Lines - Block" on page 4 or a single item in data grid **1**, that you wish to add to a contract.
9. Click on the line separator of the selected item(s), **hold** and **drag** the contract item to an existing or **new contract**<sup>1</sup>, in data grid **2**.
10. As it is 'dropped', the **Drop Validation** message will display requesting;
  - **Do you want to add these items(s) to contract no. [contract number], for customer [Customer Name]?**
11. Click on **Yes**.

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<sup>1</sup>A new contract line is the blank row in data grid 2 that contains an [\*] in the row selector column



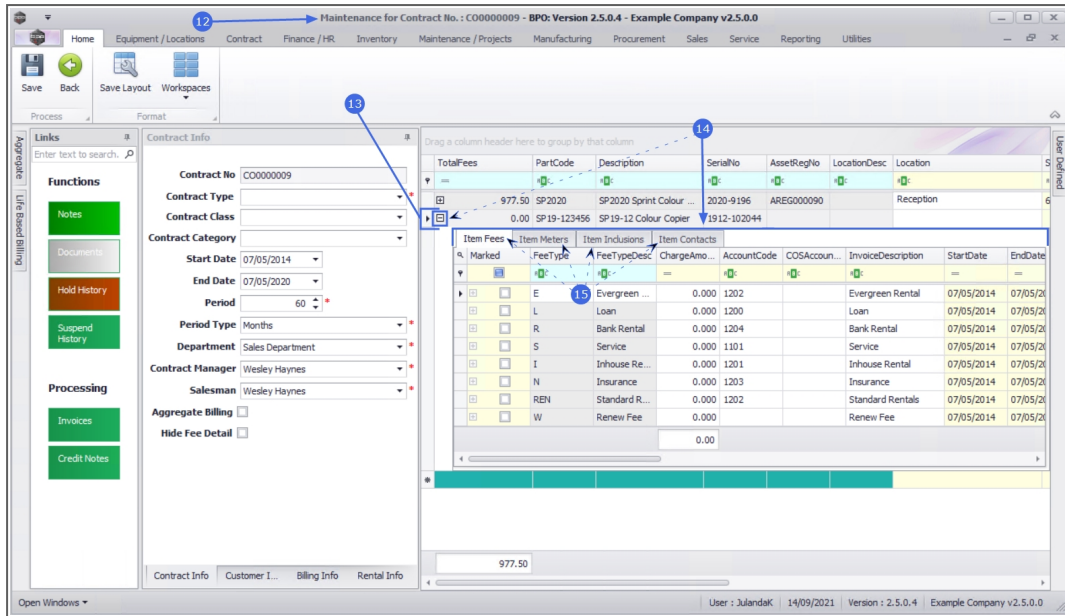
12. The **Maintenance for Contract No.** screen will be displayed.
13. The contract item you have added will be listed last in the **Parts** data grid.

## PART ITEMS FRAME

14. The **Items** frame for the part with sub grids will expand, for adding information to:
  - Item Fees
  - Item Meters
  - Item Inclusions
  - Item Contacts
15. Complete the **Part Item** frames as required.



For a detailed handling of this topic refer to [Add a New Contract](#)



16. The **scroll bar** at the bottom indicates that further information is available. Scroll right to view all the contract item information.

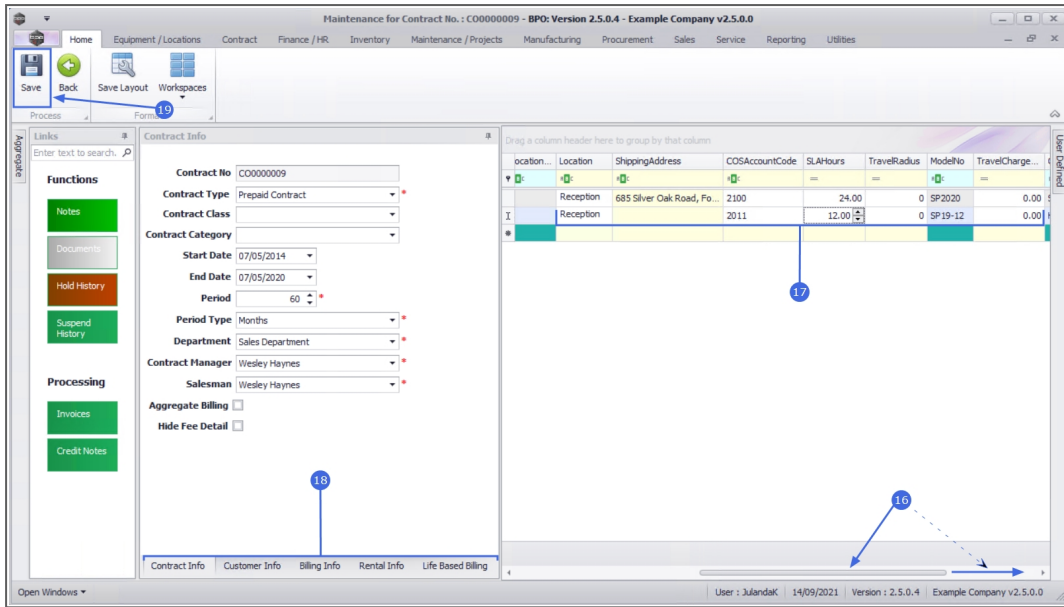
17. You can link or edit the:

- **Location**
- **Shipping Address**
- **COS Account Code**
- **SLA Hours**
- **Travel Radius**
- **Travel Charge**

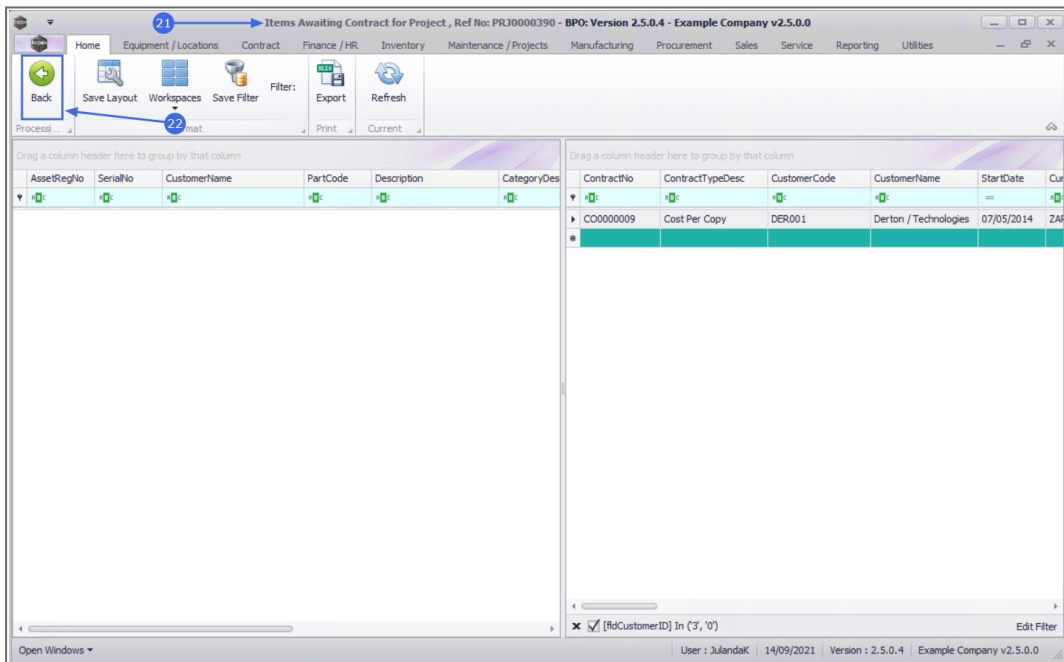
18. Complete the **Contract Info**, **Customer Info** and **Billing Info** and **Rental Info** and **Life Based Billing** info.

## SAVE ITEM FOR CONTRACT

19. Click on **Save**.



20. The item will be linked to the **existing** contract and the contract details will be **saved**.
21. You will return to the **Items Awaiting Contract for Project** listing screen.
22. Click on **Back** to return to the Project Listing screen.





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