

CONTRACT

ADD ITEM INCLUSIONS

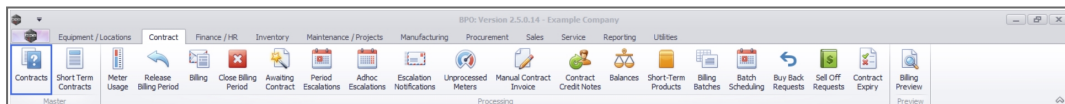
Item Inclusions are items which are included on a contract and should not be billed separately. These items are selected first by category and then by the item within that category.

Examples of Item Inclusion **Category Types** are:

- **Part Inclusion**e.g., toner
- **BOM Inclusion**e.g., machine service BOM
- **Craft Inclusion**e.g., technician
- **Service Inclusion**e.g., call out fee

More than one item inclusion can be added from **each** category type.

Ribbon Select **Contract > Contracts**



The **Contract Listing** screen will be displayed.

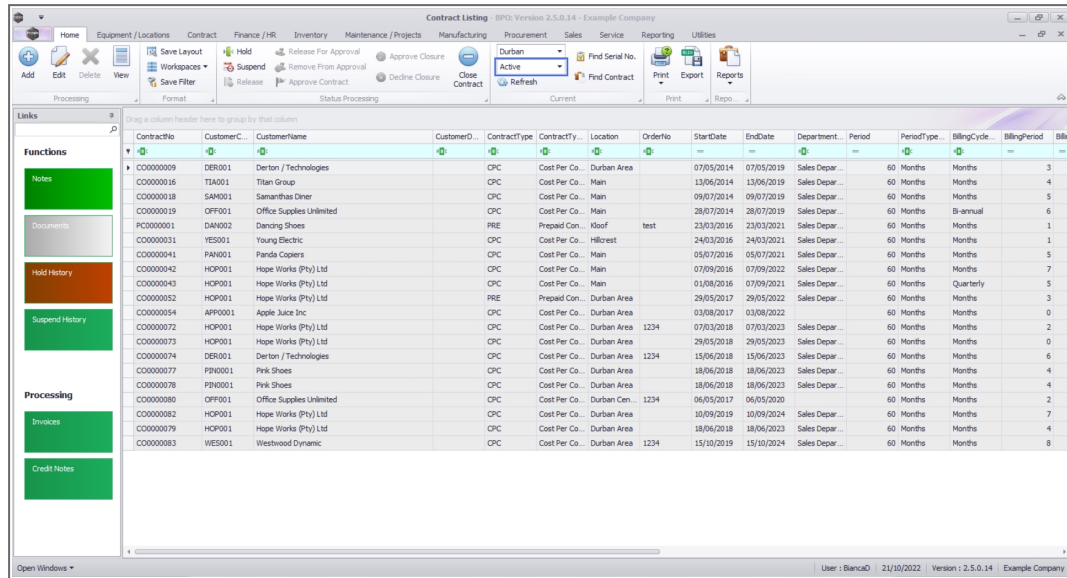
Select the Site

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.

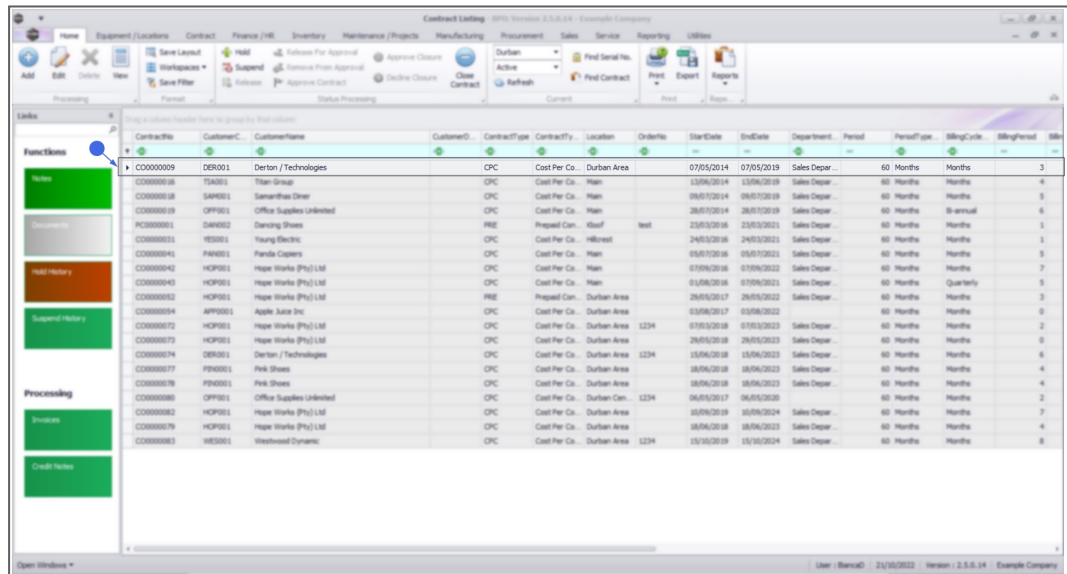
Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.



ContractNo	CustomerC	CustomerName	ContractType	ContractFy	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bill
CO000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60	Months	Months	3	
CO000016	TSR001	Titan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60	Months	Months	4	
CO000018	SAH001	Samanthas Diner	CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60	Months	Months	5	
CO000019	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60	Months	Bi-annual	6	
PC000001	DAN002	Dancing Shoes	PRE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60	Months	Months	1	
CO000031	YES001	Young Electric	CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60	Months	Months	1	
CO000041	PAN001	Panda Copiers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60	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	7	
CO000043	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		01/08/2016	07/09/2022	Sales Depart...	60	Months	Quarterly	5	
CO000052	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60	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	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	2	
CO000073	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60	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	6	
CO000077	PRN001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000078	PRN001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000080	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60	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	7	
CO000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	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	8	

SELECT THE CONTRACT

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



ContractNo	CustomerC	CustomerName	ContractType	ContractFy	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bill
CO000009	DER001	Derton / Technologies	CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60	Months	Months	3	
CO000016	TSR001	Titan Group	CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60	Months	Months	4	
CO000018	SAH001	Samanthas Diner	CPC	Cost Per Co.	Main		09/07/2014	09/07/2019	Sales Depart...	60	Months	Months	5	
CO000019	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60	Months	Bi-annual	6	
PC000001	DAN002	Dancing Shoes	PRE	Prepaid Con.	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60	Months	Months	1	
CO000031	YES001	Young Electric	CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60	Months	Months	1	
CO000041	PAN001	Panda Copiers	CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60	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	7	
CO000043	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Main		01/08/2016	07/09/2022	Sales Depart...	60	Months	Quarterly	5	
CO000052	HOP001	Hope Works (Pty) Ltd	PRE	Prepaid Con.	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60	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	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	2	
CO000073	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60	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	6	
CO000077	PRN001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000078	PRN001	Pink Shoes	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	Months	Months	4	
CO000080	OPF001	Office Supplies Unlimited	CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60	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	7	
CO000079	HOP001	Hope Works (Pty) Ltd	CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60	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	8	

- Click on the **Edit** button.

Contract Listing - BPO: Version 2.5.1.4 - Example Company

Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save Layout

Workspaces

Save Filter

Hold

Suspend

Release

Release For Approval

Remove From Approval

Approve Contract

Approve Closure

Decline Closure

Close Contract

Refresh

Find Serial No.

Find Contract

Print

Export

Reports

Process

Current

Print

Repo.

Links

Enter text to search...

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

Drag a column header here to group by that column

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Bills
CO0000012	TIA001	Titan Group		CPC	Cost Per Co...	Durban Area		16/05/2014	16/05/2019	Sales Depar...	60 Months	Months	Months	3	
CO0000016	TIA001	Titan Group		CPC	Cost Per Co...	Main		13/06/2014	13/06/2019	Sales Depar...	60 Months	Months	Months	4	
CO0000018	SAM001	Samanthas Diner		CPC	Cost Per Co...	Durban Area		09/07/2014	09/07/2019	Sales Depar...	60 Months	Months	Months	5	
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co...	Main		28/07/2014	28/07/2019	Sales Depar...	60 Months	Bi-annual	Months	6	
CO0000031	YES001	Young Electric		CPC	Cost Per Co...	Hilcrest		24/03/2016	24/03/2021	Sales Depar...	60 Months	Months	Months	1	
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co...	Main		05/07/2016	05/07/2021	Sales Depar...	60 Months	Months	Months	5	
CO0000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Main		01/08/2016	07/09/2021	Sales Depar...	60 Months	Quarterly	Months	5	
CO0000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar...	60 Months	Months	Months	2	
CO0000074	DER001	Derton / Technologies		CPC	Cost Per Co...	Durban Area	1234	13/06/2018	13/06/2023	Sales Depar...	60 Months	Months	Months	6	
CO0000077	PSH0001	Perk Shoes		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000078	PSH0001	Perk Shoes		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	
CO0000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co...	Durban Cen...	1234	06/05/2017	06/05/2020		60 Months	Months	Months	2	
CO0000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	Months	4	

Open Windows

User : Bianca09/02/2023Version : 2.5.1.4Example Company

The **Contract Maintenance** screen will be displayed.

Maintenance for Contract No.: CO0000016 - Status: A - BPO: Version 2.5.1.4 - Example Company

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

Save Back Save Layout Workspaces Process Format

Links: Enter text to search...

Functions: Notes, Documents, Hold History, Suspend History, Processing: Invoices, Credit Notes

Contract Info

Contract No: CO0000016

Contract Type: Cost Per Copy

Contract Class: [Dropdown]

Contract Category: [Dropdown]

Start Date: 13/06/2014

End Date: 13/06/2019

Period: 60

Period Type: Months

Department: Sales Department

Contract Manager: Carolina Suzzetta Lourens van de ...

Salesman: Belinda Sharnan

Aggregate Billing: ☐

Hide Fee Detail: ☐

PartCode Description SerialNo AssetRegNo Location ShippingAddress COSAccount SLA/Ref

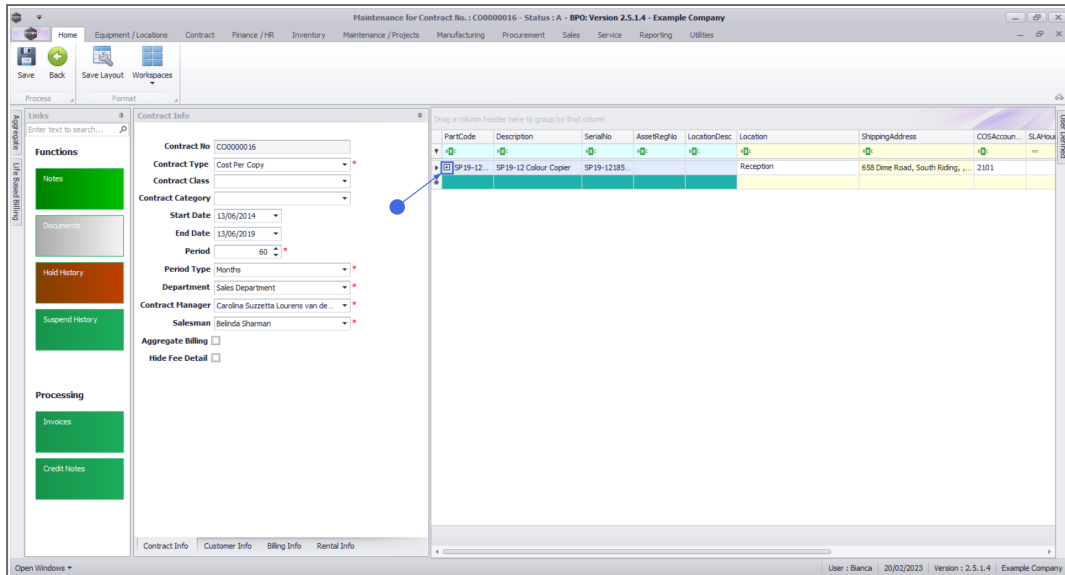
SP 19-12 SP 19-12 Colour Copier SP 19-12 185 Reception 658 Dime Road, South Riding, ... 2101

Contract Info Customer Info Billing Info Rental Info

Open Windows User : Bianca 09/02/2023 Version : 2.5.1.4 Example Company

SELECT THE ITEM

- Click on the row of the contract item you wish to work with.

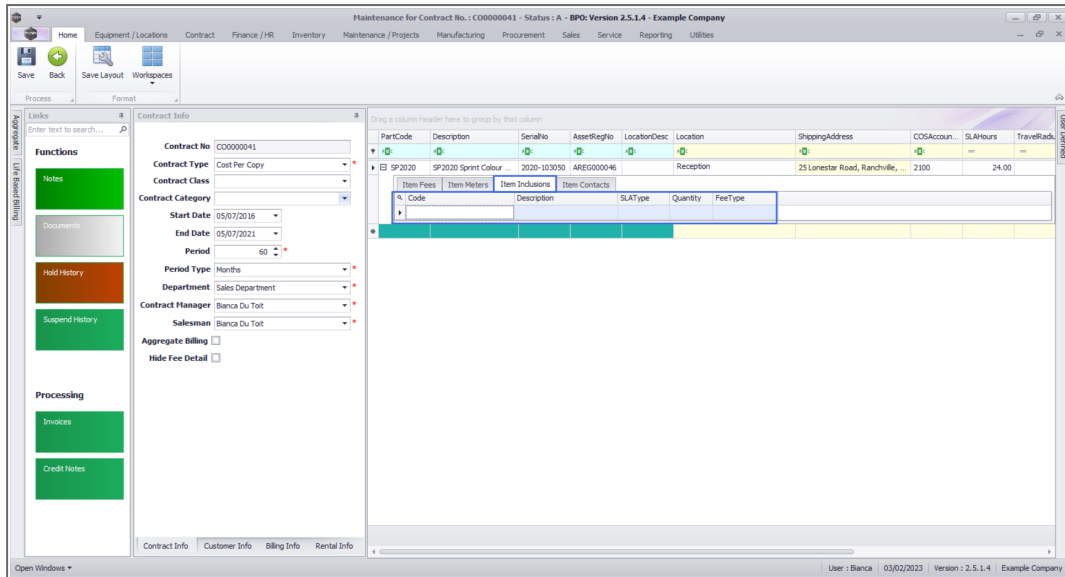


Item Inclusions Frame

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

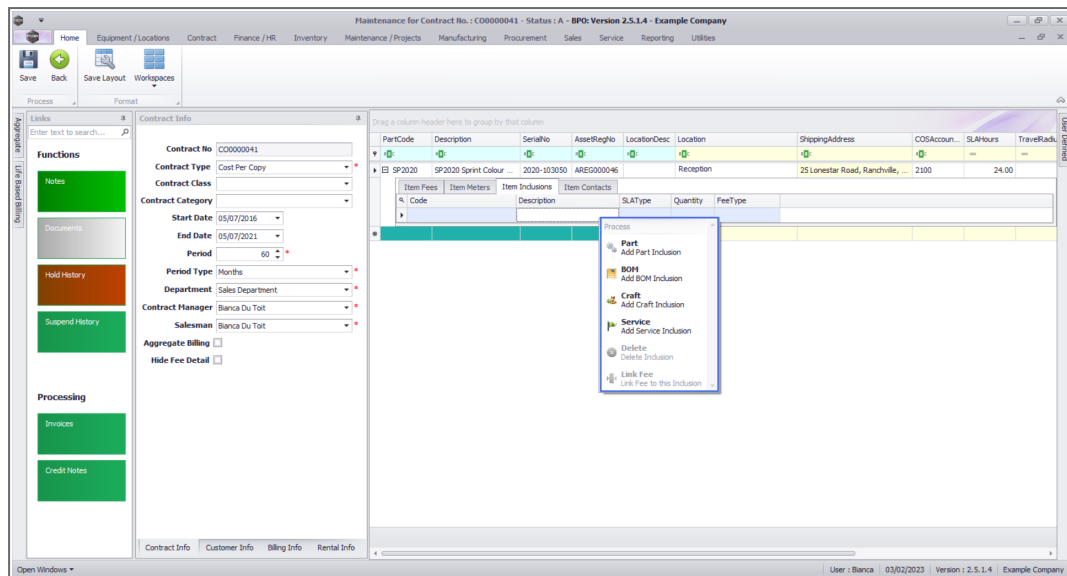
The **Item Inclusions** frame will be expanded.

- In the **Item Inclusions** frame, you can add all **Contract Inclusions** (items which are included in the contract and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically “included” in the contract and are covered by a set contract 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.



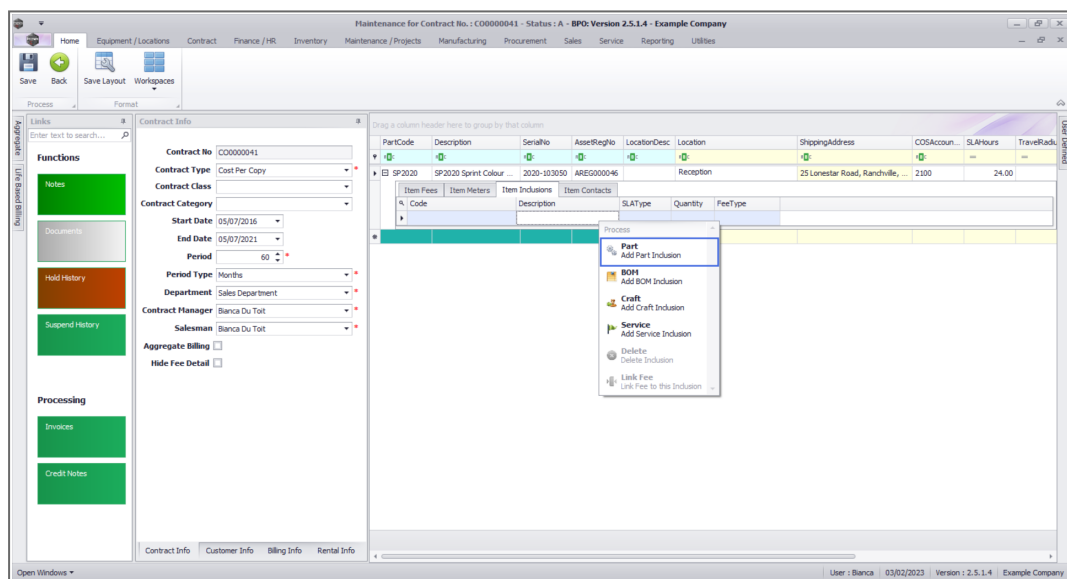
Add Item Inclusions

- **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](#)

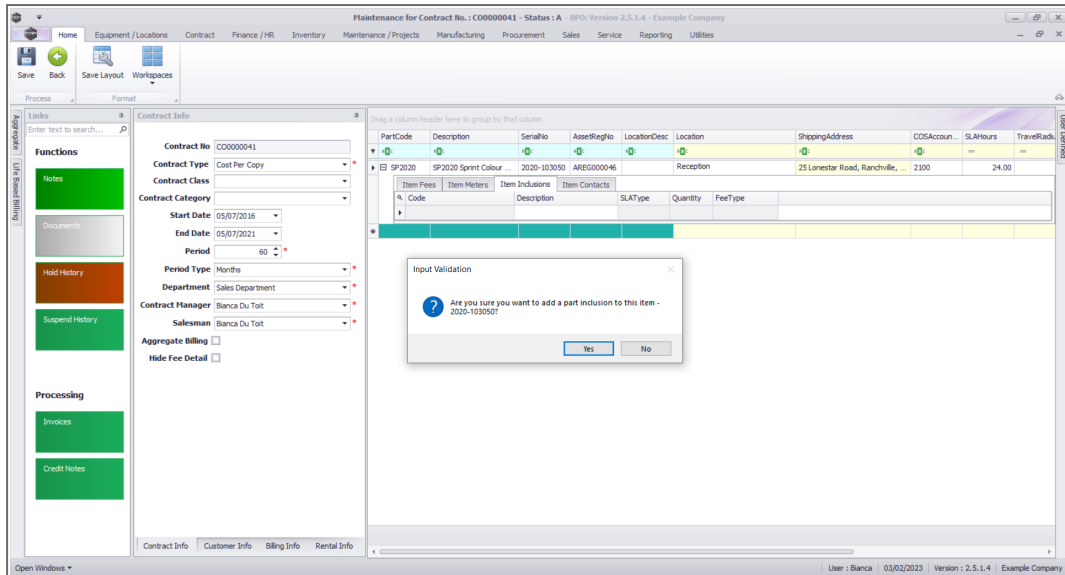


Add Part Inclusion

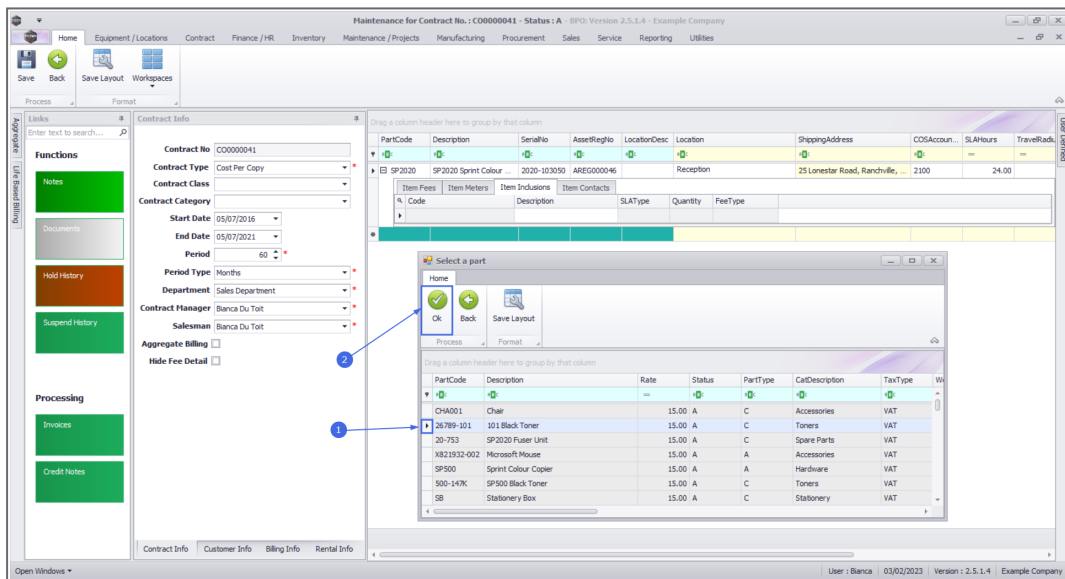
- Click on **Part** - Add Part Inclusion.



- 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**.

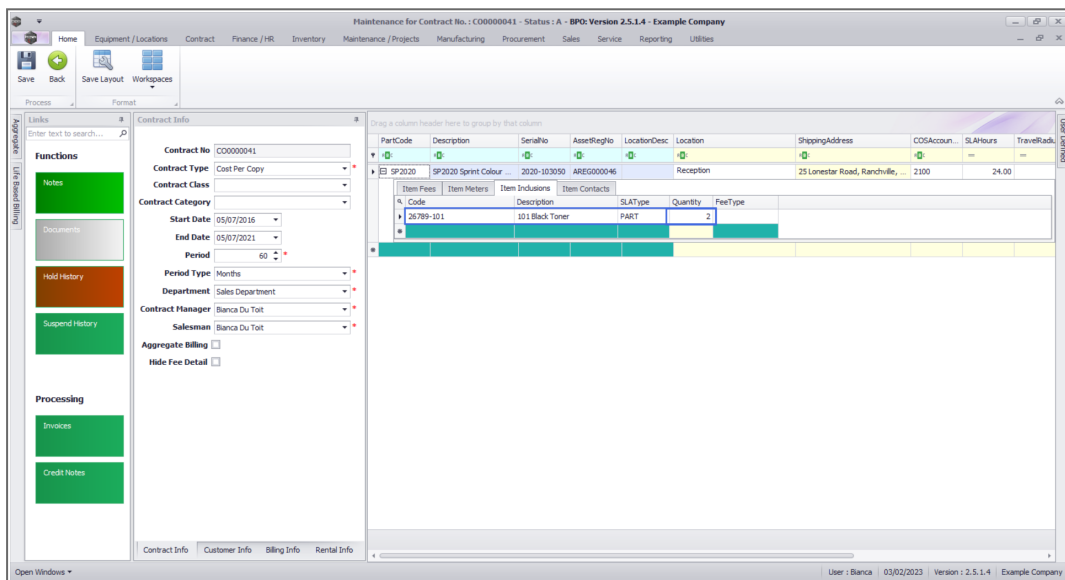


- A **Select a part** screen will pop up.
- Click on the **row selector** in front of the **part** you wish to **add** to this contract as an **inclusion**
- Click on **Ok**.



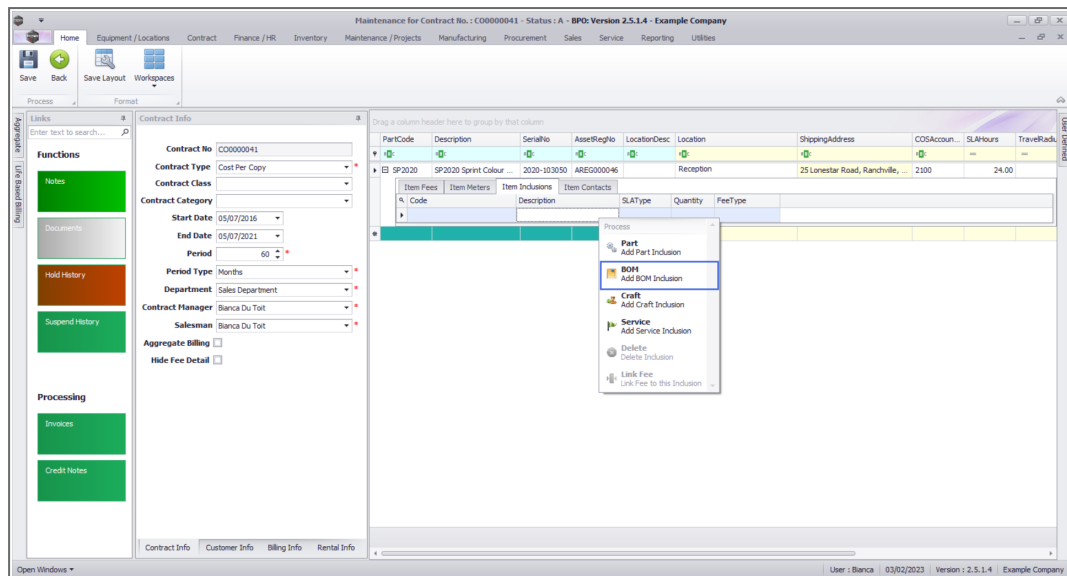
- The selected part will be **added** to the **Item Inclusion** frame.

- **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 part.
- **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.

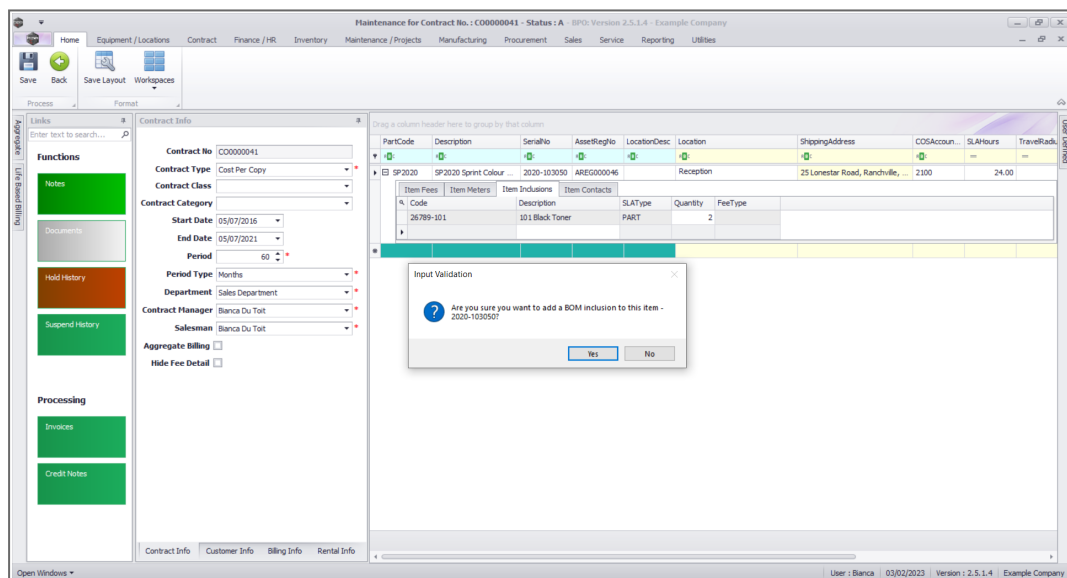


Add Bill of Materials Inclusion

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



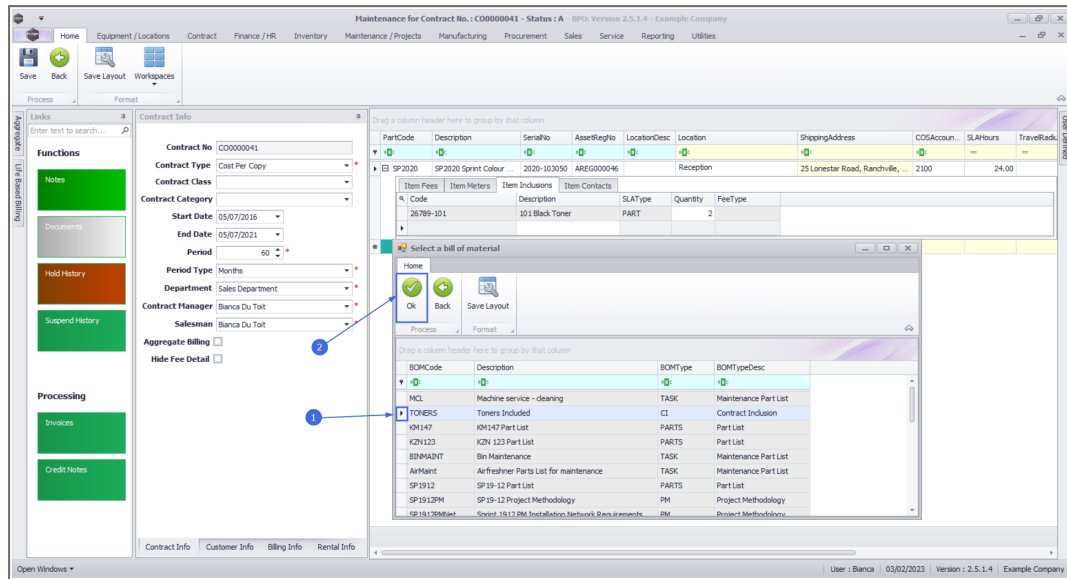
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??**
- Click on **Yes**.



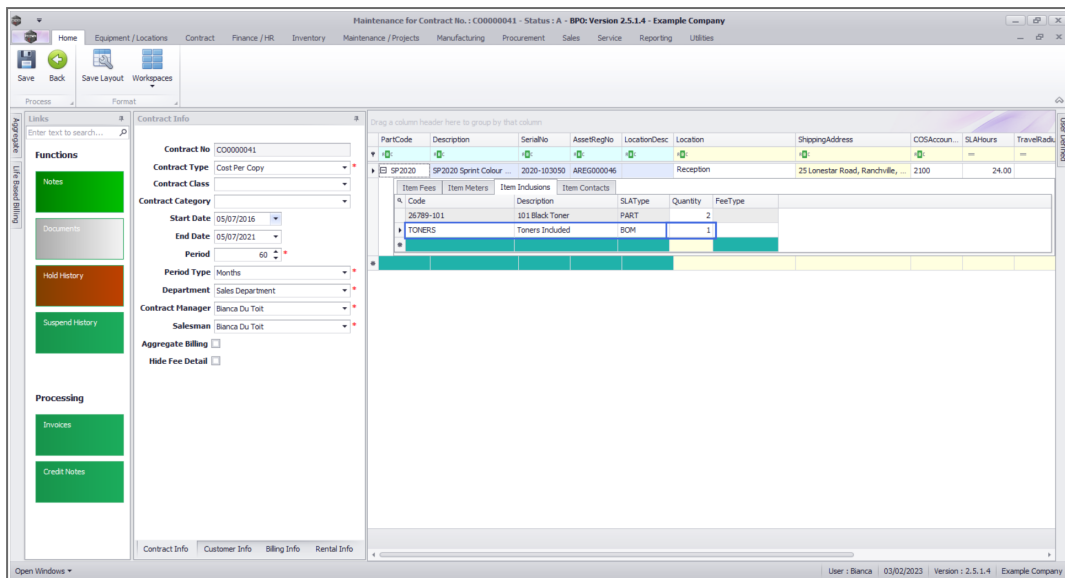
- A **Select a bill of material** screen will pop up.
- Click on the **row selector** in front of the **BOM** you wish to **add** to

this contract as an ***inclusion***.

- Click on **Ok**.

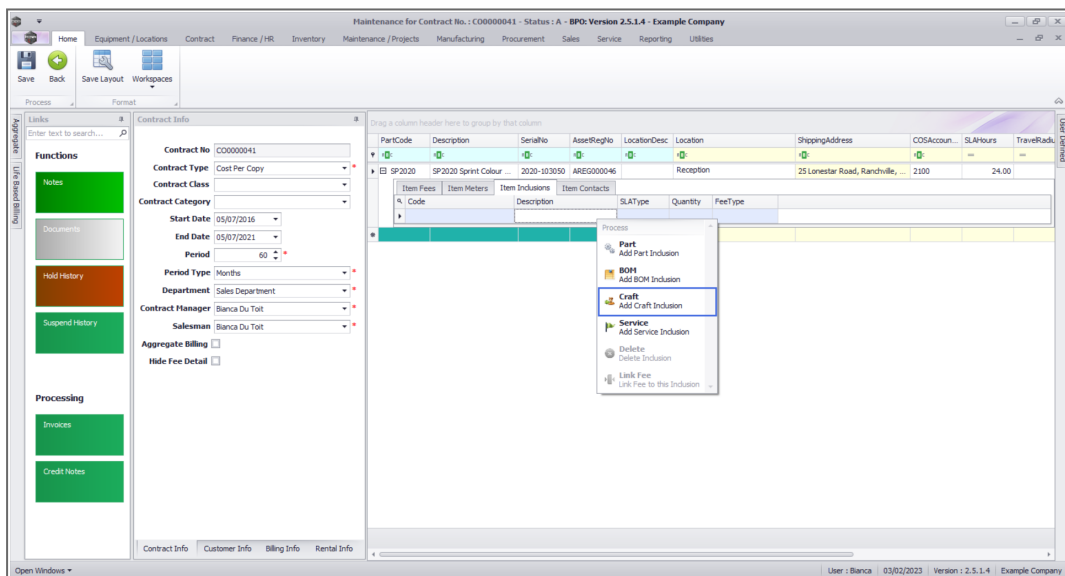


- The selected **BOM** will be added to the **Item Inclusions** frame.
- Code:** This field will auto populate with the code of the selected item.
- Description:** This field will auto populate with the description of the selected item.
- SLA Type:** This field will auto populate with the SLA type of 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.

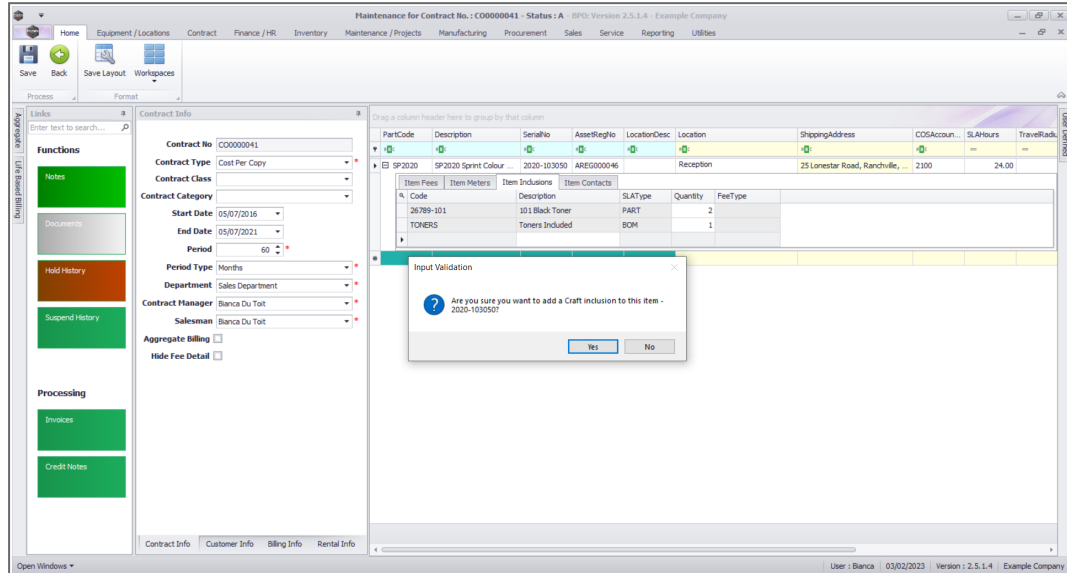


Add Craft Inclusion

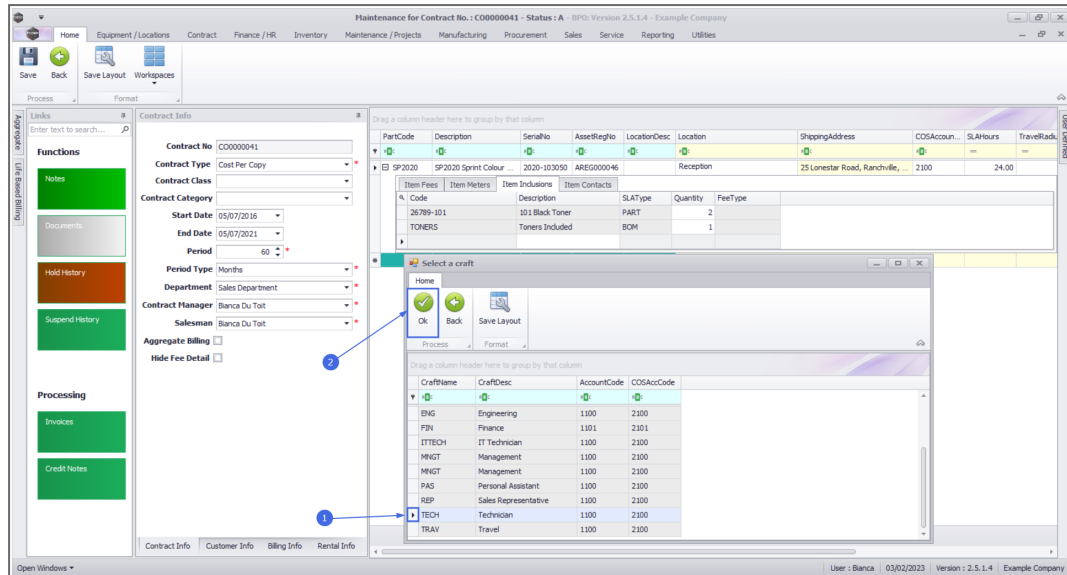
- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** - Add Craft Inclusion.



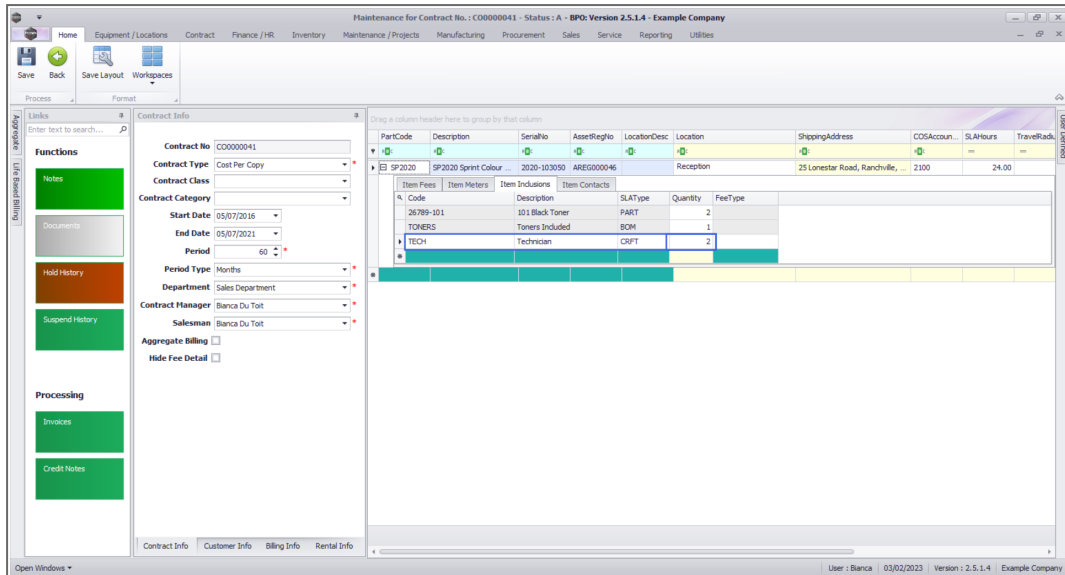
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Craft inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



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



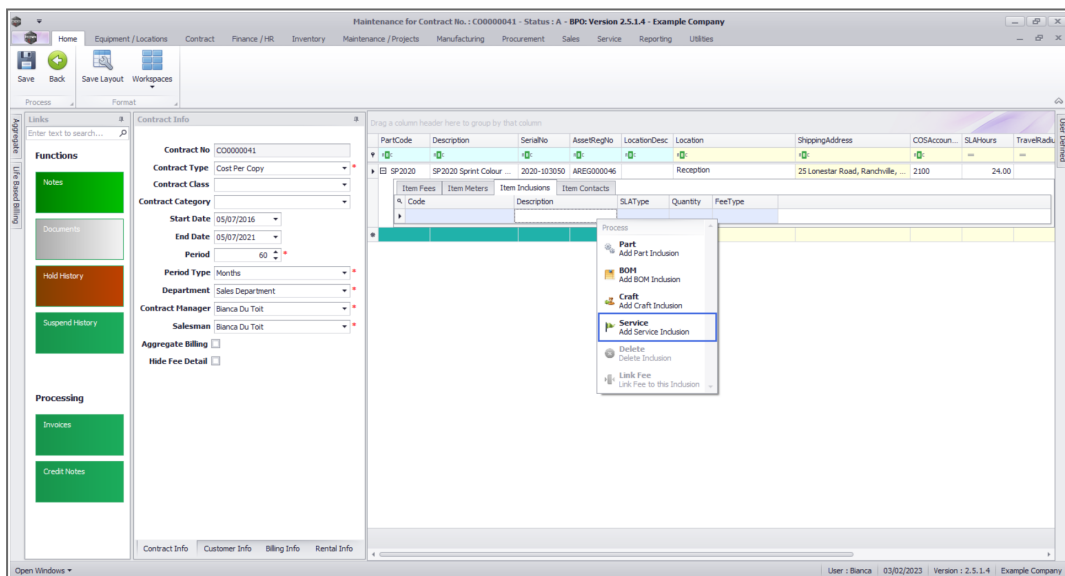
- The selected **Craft** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the 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.



The screenshot shows the 'Maintenance for Contract No.: C00000041 - Status: A - BPO: Version 2.5.1.4 - Example Company' window. The 'Contract Info' frame on the left contains fields for Contract No., Contract Type, Contract Class, Contract Category, Start Date, End Date, Period, Period Type, Department, Contract Manager, Salesman, Aggregate Billing, and Hide Fee Detail. The 'Item Inclusions' frame on the right displays a table with columns: PartCode, Description, SerialNo, AssetRegNo, LocationDesc, Location, ShippingAddress, COSAccount, SLAHours, and TravelRadius. Below this, there is a table for Item Fees with columns: Item Fees, Item Meters, Item Inclusions, Item Contacts, SLAType, Quantity, and FeeType. The table shows two rows: one for '26789-101' (101 Black Toner) and one for 'TECH' (Technician).

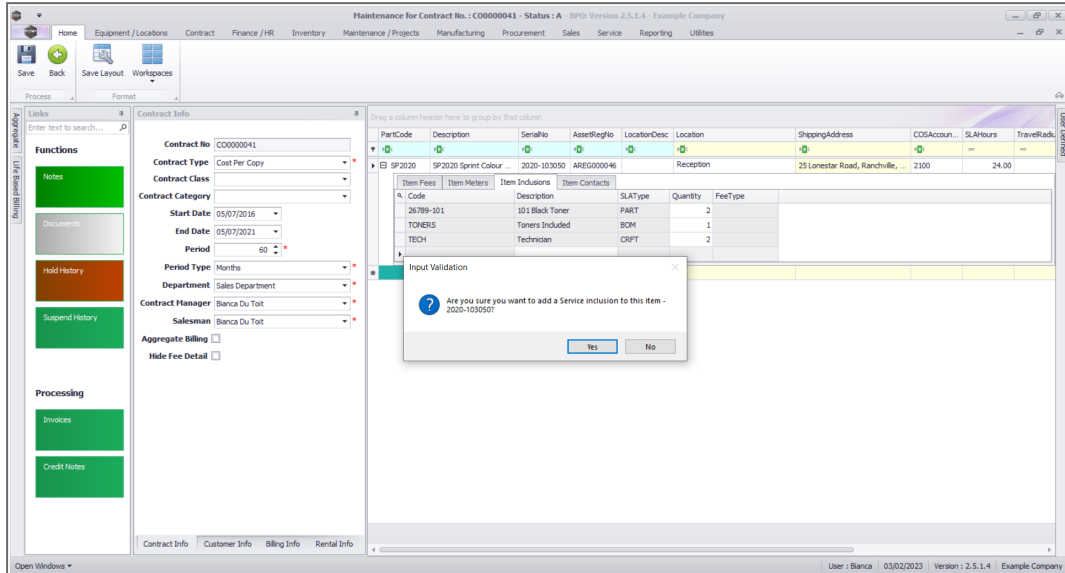
Add Service Inclusion

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

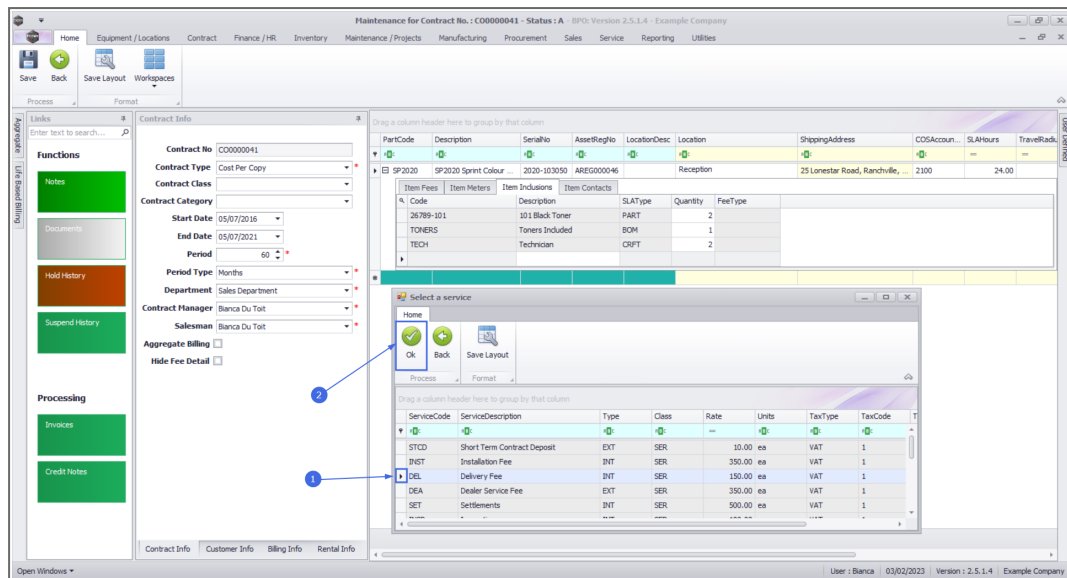


The screenshot shows the same 'Maintenance for Contract No.: C00000041 - Status: A - BPO: Version 2.5.1.4 - Example Company' window. The 'Process' menu is open over the 'Item Inclusions' frame, showing options: Part (Add Part Inclusion), BOM (Add BOM Inclusion), Craft (Add Craft Inclusion), Service (Add Service Inclusion), Delete (Delete Inclusion), and Link Fee (Link Fee to this Inclusion). The 'Service' option is highlighted.

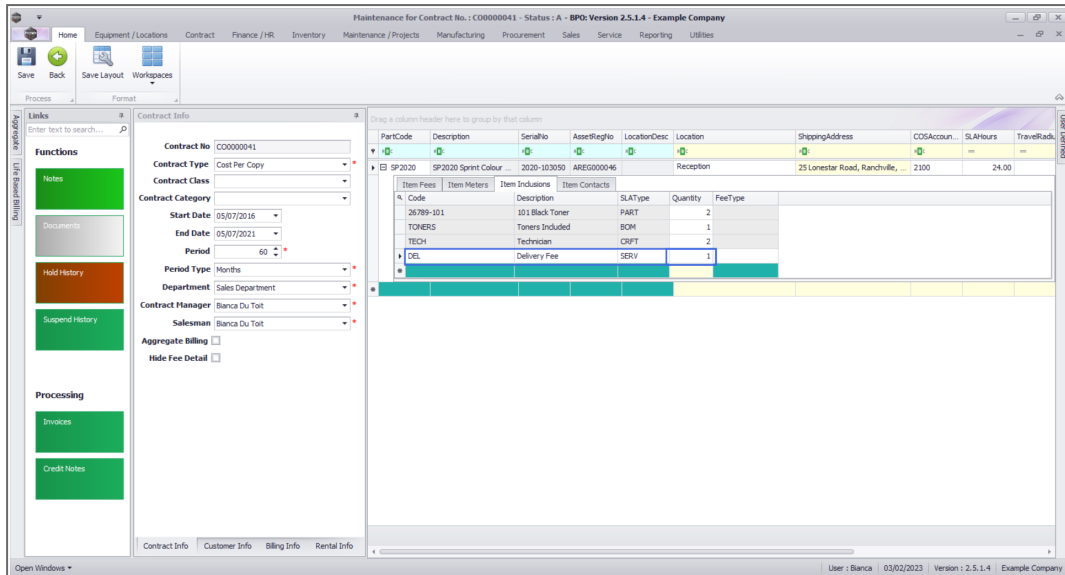
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Service inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



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



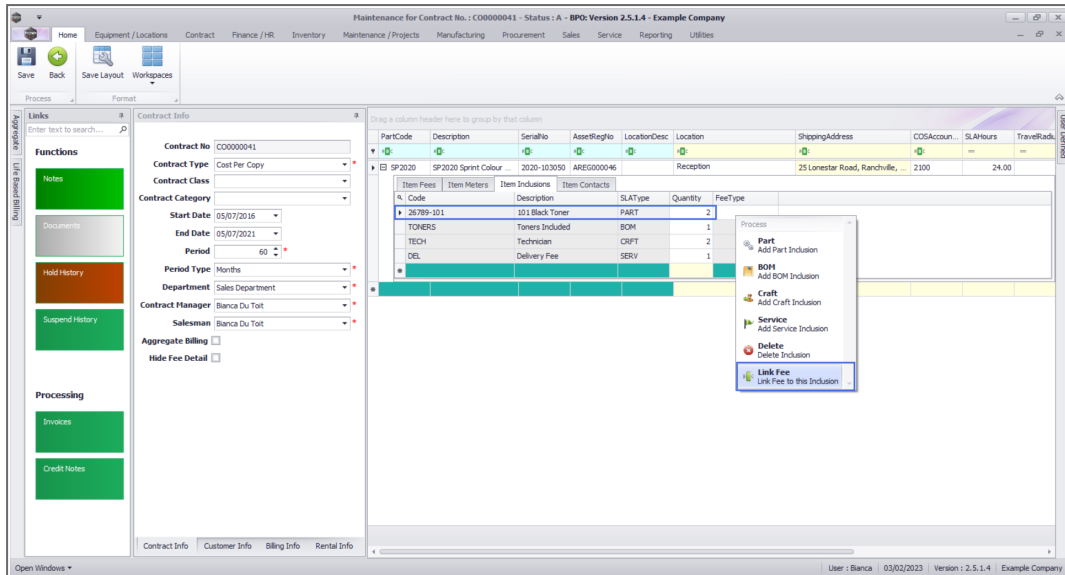
- The selected **Service** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the 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.



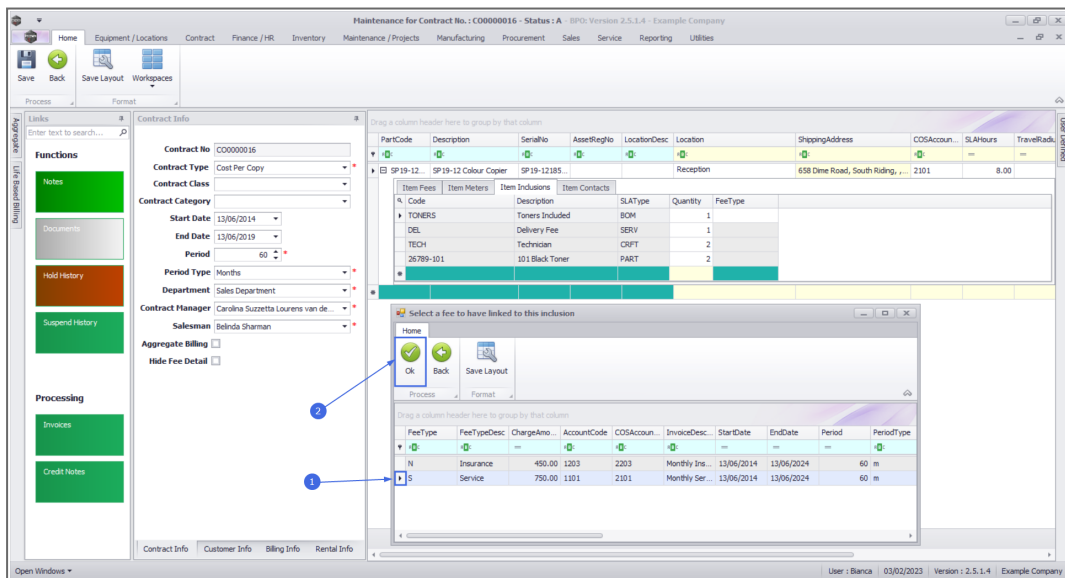
- **Note:** You can add more than one of each type of item inclusion to the contract.

Link a Fee to an Inclusion

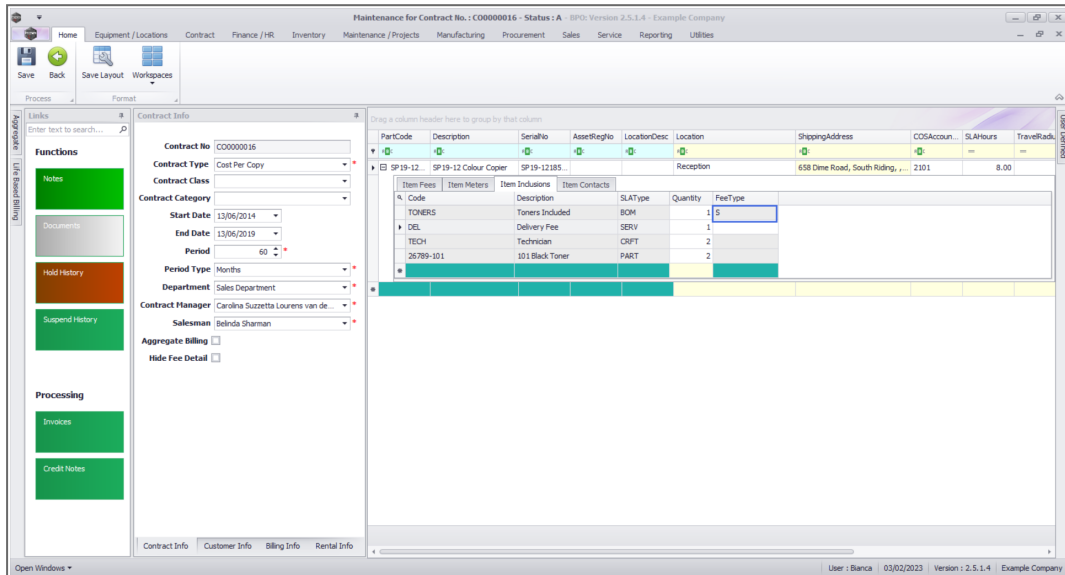
- **Right click** in the **row** of the **item inclusion** that you wish to **link a fee** to.
 - In this image **IT Technician** has been selected.
- The **Process** menu will pop up.
- Click on **Link Fee** - Link Fee to this Inclusion.



- 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.



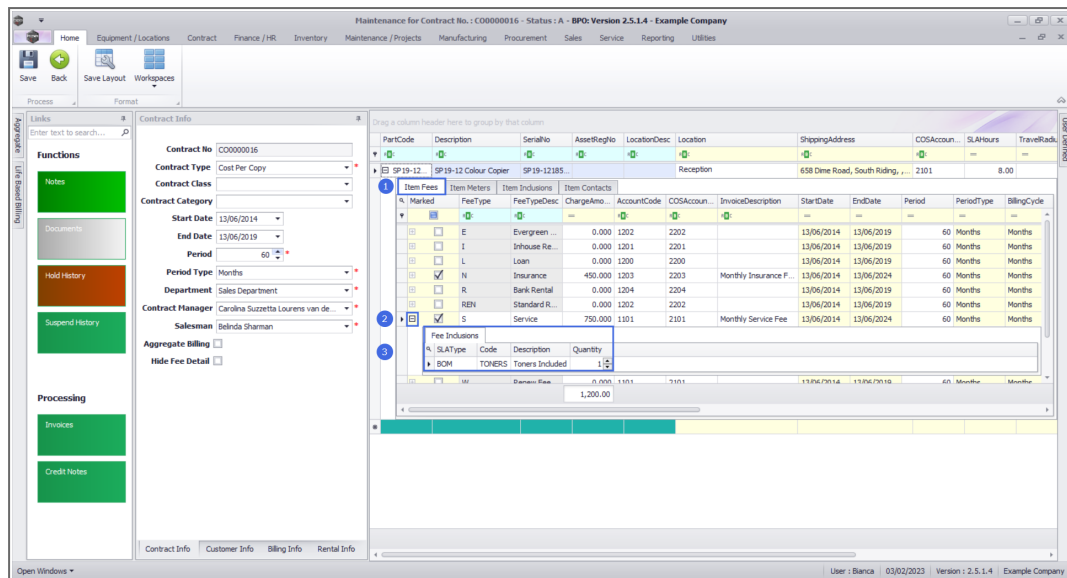
- The **The Fee Type** field will be populated with the selected fee type.
- In this image, **S** - Service was selected, since the selected inclusion is covered by the Service Fee, in this example.



View the linked Inclusion on the Fee Detail

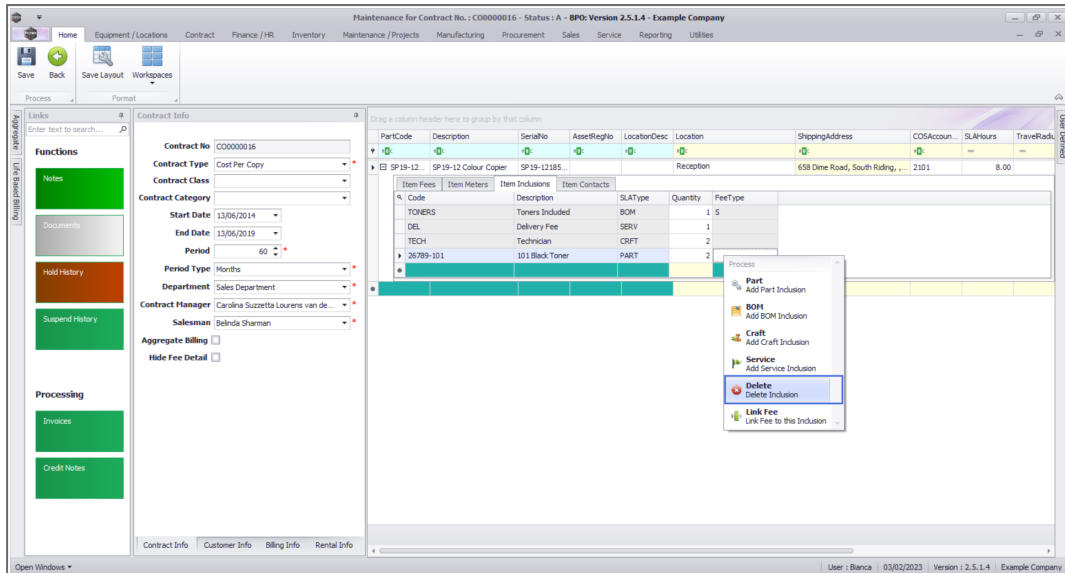
Note: that for this step you will need to save the contract first and then come back to view the Fee's linked Inclusion.

- 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.

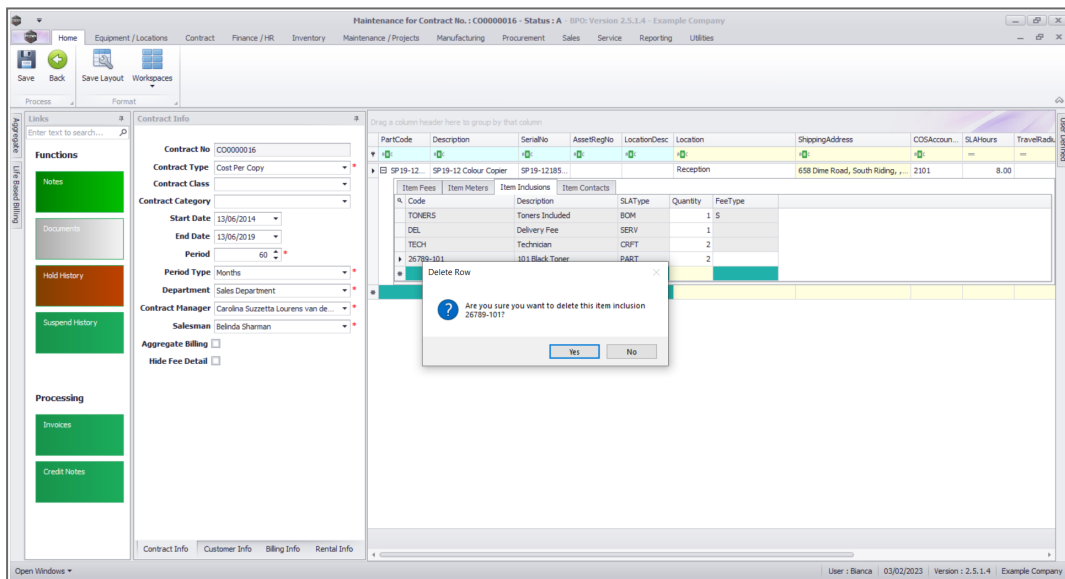


Delete Inclusion

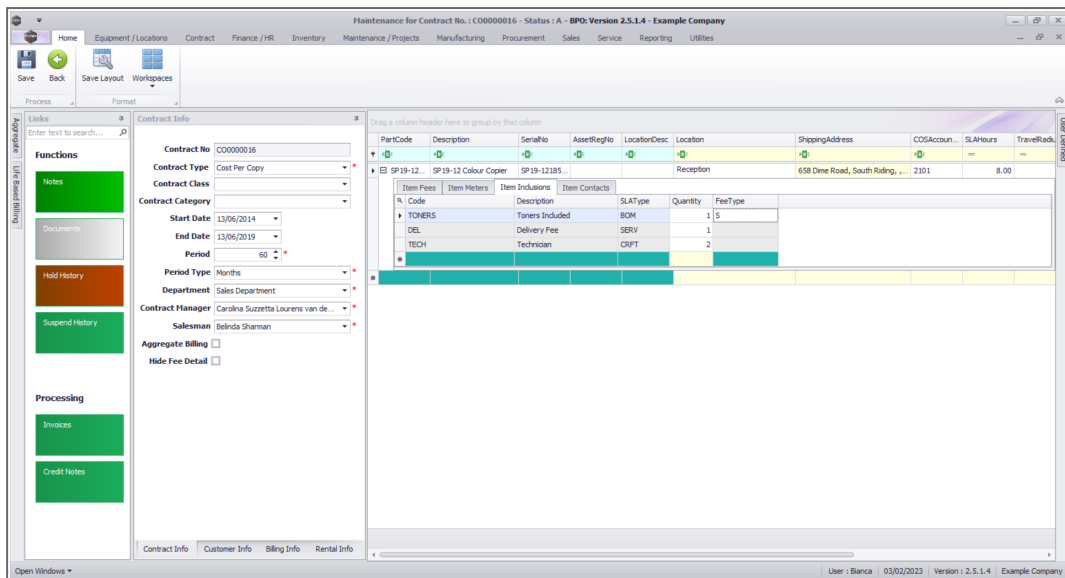
- Another option in the **Item Inclusions Process** menu is **Delete** Inclusion.
- **Right click** in the **row** of the **item inclusion** that you wish to **delete** from the contract.
 - In this image **INST** - Installation Fee has been selected.
- The **Process** menu will pop up.
- Click on **Delete**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



- 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**.



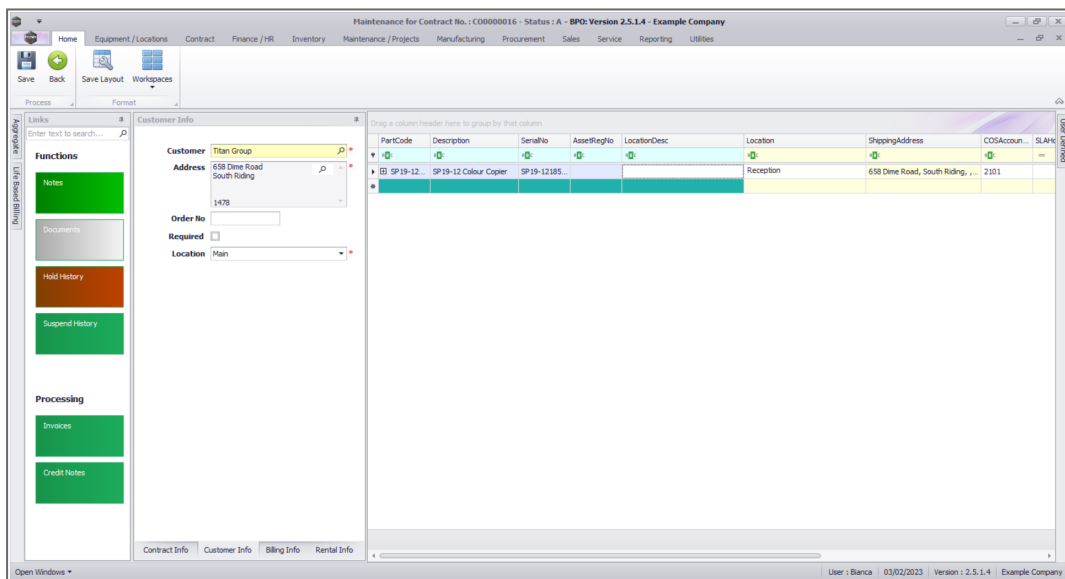
- The selected item will now be **removed** from the **Item Inclusions** frame.



SAVE ITEM INCLUSIONS

SAVE THE CONTRACT

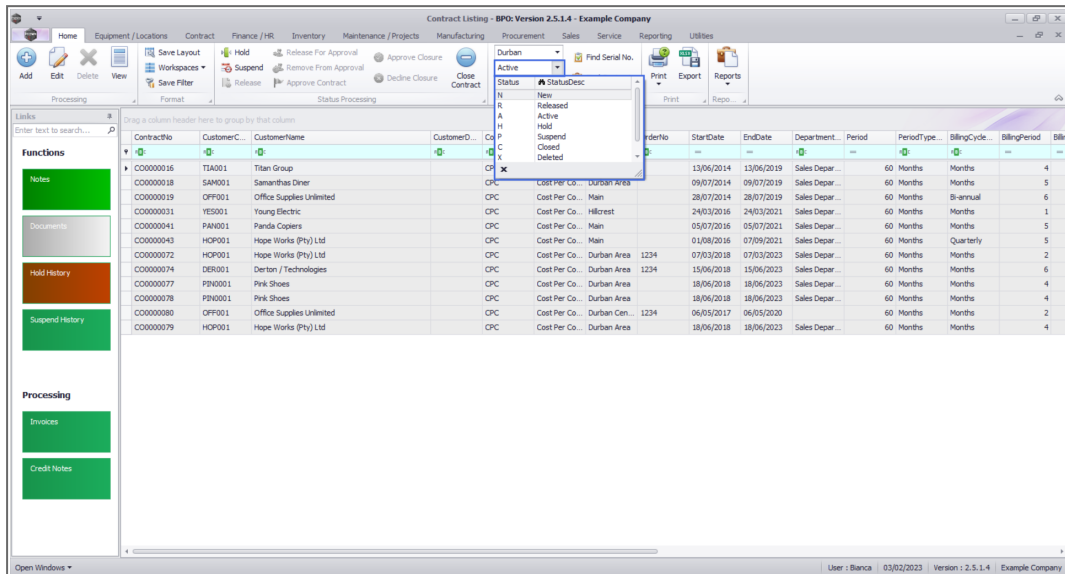
- When you are done, click on **Save**.



- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set

to the Status you last selected.

- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **New** contracts can be found within the **New** contract status listing screen.
- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- **Edited** contracts may either remain in **Active** status or move to **Released** status in order for changes to be reviewed before **Approval** depending on the change made.

Contract Listing - BPO: Version 2.3.0.4 - TEST ALPHA - JUDITH PC LOCAL

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

Add Edit Delete View Save Layout Workspaces Save Filter Processing Format Status Processing

Hold Release For Approval Release Suspend Remove From Approval Approve Contract Close Contract

Pretoria New Find Serial No. Find Contract Refresh Print Export Reports

Links Enter text to search

Functions

Notes

Documents

Hold History

Suspend History

Processing

Invoices

Credit Notes

ContractNo	CustomerCode	CustomerName	CustomerDeptName	ContractType	ContractTypeDesc	Location	OrderNo	StartDate	EndDate	DepartmentName	Period
CO0000254	HOP001	Hope Works	Sales Department	CPC	Cost Per Copy	Pretoria 1		09/12/2019	09/12/2024	Sales Department	60

Open Windows User: JudithM 09/12/2019 Version: 2.3.0.4 TEST ALPHA - JUDITH PC LOCAL

MNU.112.027