

CONTRACT

EDIT CONTRACT ITEM

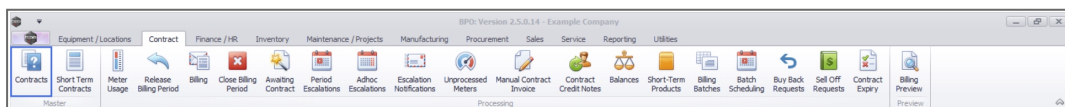
A contract **item** can be edited when the contract is in the **Active** state.

Certain amendments made to the contract item, will trigger the contract to be moved back to the Released state, in order for the contract to be checked and re-Approved. An email will then be sent to all users who have the rights to authorise this contract.

These are the changes involved that will trigger the re-Approval process:

- If any contract **Item** is added or removed
- If any contract **Item Fee** is added or removed
- If the **Billing Customer** on an Item Fee or Item Meter is changed.
- If any of the following details are changed on contract **Item Fees**:
 - Amount
 - Start Date
 - End Date
 - Escalation %
 - Account Code
 - COS Account Code
 - Invoice Description
 - Billing Period
 - Billing Cycle
 - Finance Party
 - Finance Amount

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	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	Bills
CO000009	DER001	Derbon / Technologies	CPC	Durban Area		07/05/2014	07/05/2019	Sales Depart...	60 Months	Months		3	
CO000016	TIA001	Titan Group	CPC	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months		4	
CO000018	SAM001	Sanambas Diner	CPC	Main		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months		5	
CO000019	OFF001	Office Supplies Unlimited	CPC	Main		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual		6	
PC000001	DAN002	Dancing Shoes	PRE	Kloof	test	23/03/2016	23/03/2021	Sales Depart...	60 Months	Months		1	
CO000031	YES001	Young Electric	CPC	Hlorest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months		1	
CO000041	PAN001	Panda Copiers	CPC	Main		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months		5	
CO000042	HCP001	Hope Works (Pty) Ltd	CPC	Main		07/09/2016	07/09/2022	Sales Depart...	60 Months	Months		7	
CO000043	HCP001	Hope Works (Pty) Ltd	CPC	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly		5	
CO000052	HCP001	Hope Works (Pty) Ltd	PRE	Durban Area		29/05/2017	29/05/2022	Sales Depart...	60 Months	Months		3	
CO000054	APP0001	Apple Juice Inc	CPC	Durban Area		03/08/2017	03/08/2022	Sales Depart...	60 Months	Months		0	
CO000072	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area	1234	07/13/2018	07/13/2023	Sales Depart...	60 Months	Months		2	
CO000073	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area		29/05/2018	29/05/2023	Sales Depart...	60 Months	Months		0	
CO000074	DER001	Derbon / Technologies	CPC	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months		6	
CO000077	PRN001	Pink Shoes	CPC	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months		4	
CO000078	PRN001	Pink Shoes	CPC	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months		4	
CO000080	OFF001	Office Supplies Unlimited	CPC	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months		2	
CO000082	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area		10/09/2019	10/09/2024	Sales Depart...	60 Months	Months		7	
CO000079	HCP001	Hope Works (Pty) Ltd	CPC	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months		4	
CO000083	WES001	Westwood Dynamic	CPC	Durban Area	1234	15/10/2019	15/10/2024	Sales Depart...	60 Months	Months		8	

SELECT THE CONTRACT

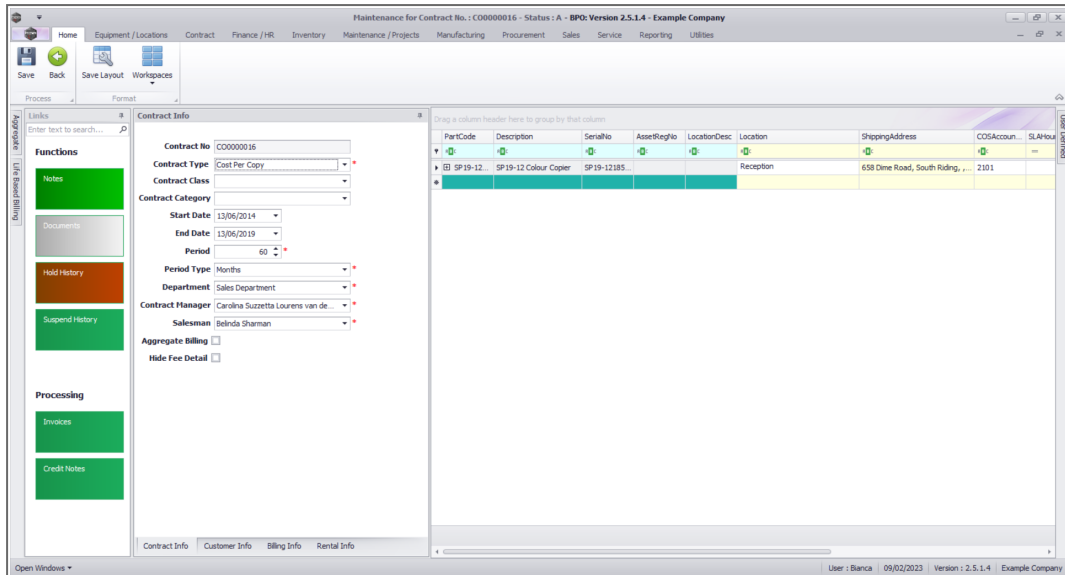
- Select the **row** of the **contract** that you wish to process.

ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractY	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillTo
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area		07/05/2014	07/05/2019	Sales Depar...	60	Months	Months	4	3
CO000008	TSAG01	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depar...	60	Months	Months	4	4
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Durban Area		09/07/2014	09/07/2019	Sales Depar...	60	Months	Months	5	5
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depar...	60	Months	Bi-annual	6	6
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con.	Kaaf	test	23/03/2016	23/03/2021	Sales Depar...	60	Months	Months	1	1
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Depar...	60	Months	Months	1	1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depar...	60	Months	Months	5	5
CO000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2022	Sales Depar...	60	Months	Months	7	7
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	01/08/2021	Sales Depar...	60	Months	Quarterly	5	5
CO000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con.	Durban Area		26/05/2017	26/05/2022	Sales Depar...	60	Months	Months	3	3
CO000054	APP0001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022	Sales Depar...	60	Months	Months	0	0
CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar...	60	Months	Months	2	2
CO000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	26/05/2018	26/05/2023	Sales Depar...	60	Months	Months	0	0
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar...	60	Months	Months	6	6
CO000077	PIR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	4	4
CO000078	PIR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	4	4
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depar...	60	Months	Months	2	2
CO000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	7	7
CO000076	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	4	4
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar...	60	Months	Months	8	8

- Click on the **Edit** button.

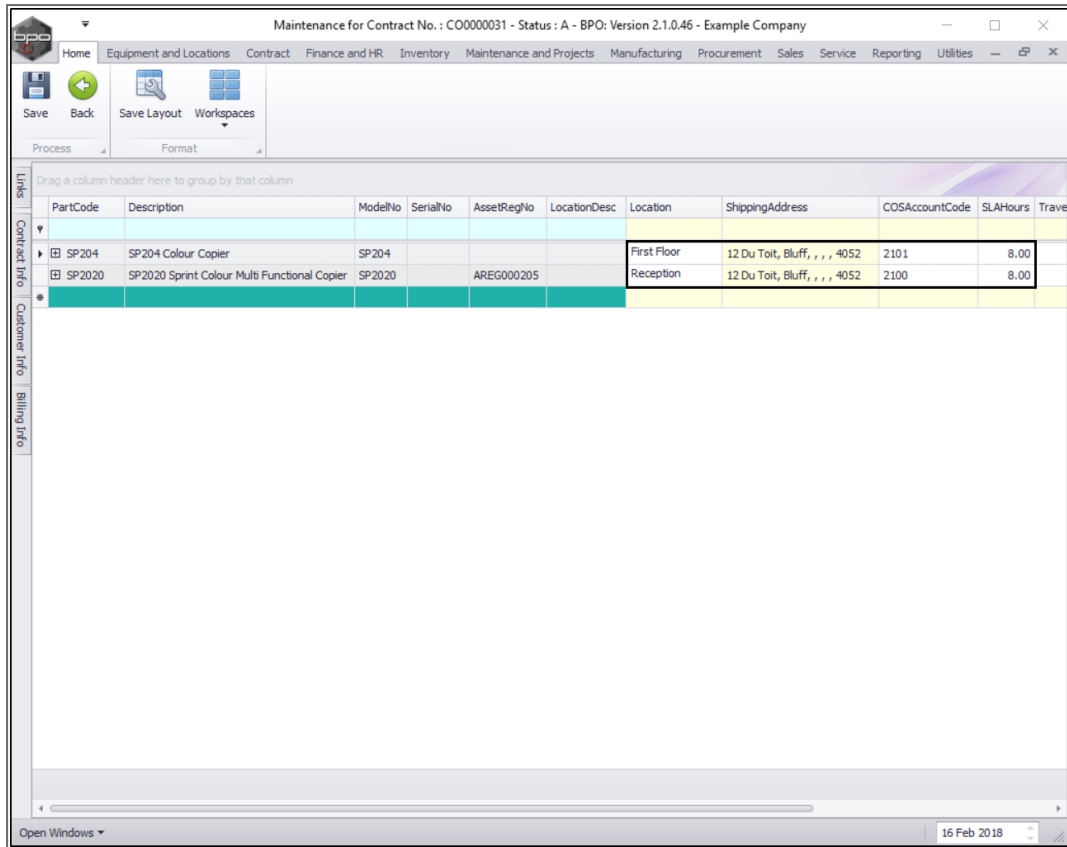
ContractNo	CustomerC	CustomerName	CustomerD	ContractType	ContractY	Location	OrderNo	StarDate	EndDate	Department	Period	PeriodType	BillingCycle	BillingPeriod	BillTo
CO000012	TIA001	Titan Group		CPC	Cost Per Co.	Durban Area		16/05/2014	16/05/2019	Sales Depar...	60	Months	Months	3	3
CO000016	TIA001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depar...	60	Months	Months	4	4
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co.	Durban Area		09/07/2014	09/07/2019	Sales Depar...	60	Months	Months	5	5
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depar...	60	Months	Bi-annual	6	6
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hilcrest		24/03/2016	24/03/2021	Sales Depar...	60	Months	Months	1	1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depar...	60	Months	Months	5	5
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depar...	60	Months	Quarterly	5	5
CO000072	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar...	60	Months	Months	2	2
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar...	60	Months	Months	6	6
CO000077	PIR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	4	4
CO000078	PIR0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	4	4
CO000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depar...	60	Months	Months	2	2
CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months	4	4

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



EDIT ITEM DETAILS

- Here you can make changes to the following contract *item* details:
 - Location
 - Shipping Address
 - COS Account Code
 - SLA Hours
 - Travel Charge
 - Is Extra
- To make a change to any of these details, click in the relevant *field* of the selected item.



EDIT LOCATION

- In this example, we have clicked in the **Location** field of the second contract item in the list.
 - The original location is **Reception**.

Maintenance for Contract No. : CO0000031 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAAccountCode	SLAHours	Travel
SP204	SP204 Colour Copier	SP204				First Floor	12 Du Toit, Bluff, , , , 4052	2101	8.00	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020		AREG000205		Reception	12 Du Toit, Bluff, , , , 4052	2100	8.00	

Links: Contract Info | Customer Info | Billing Info

Open Windows | 16 Feb 2018

- Type in the **new** location.
 - In this example, **Second Floor** has been typed in.

Maintenance for Contract No. : CO000031 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Drag a column header here to group by that column

PartCode	Description	ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	Travel
SP204	SP204 Colour Copier	SP204				First Floor	12 Du Toit, Bluff, , , , 4052	2101	8.00	
SP2020	SP2020 Sprint Colour Multi Functional Copier	SP2020		AREG000205		Second Floor	12 Du Toit, Bluff, , , , 4052	2100	8.00	

Contract Info | Customer Info | Billing Info

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EDIT TRAVEL RADIUS

- **Note:** This should be **0** if travel is included in the contract)

Maintenance for Contract No. : CO0000031 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

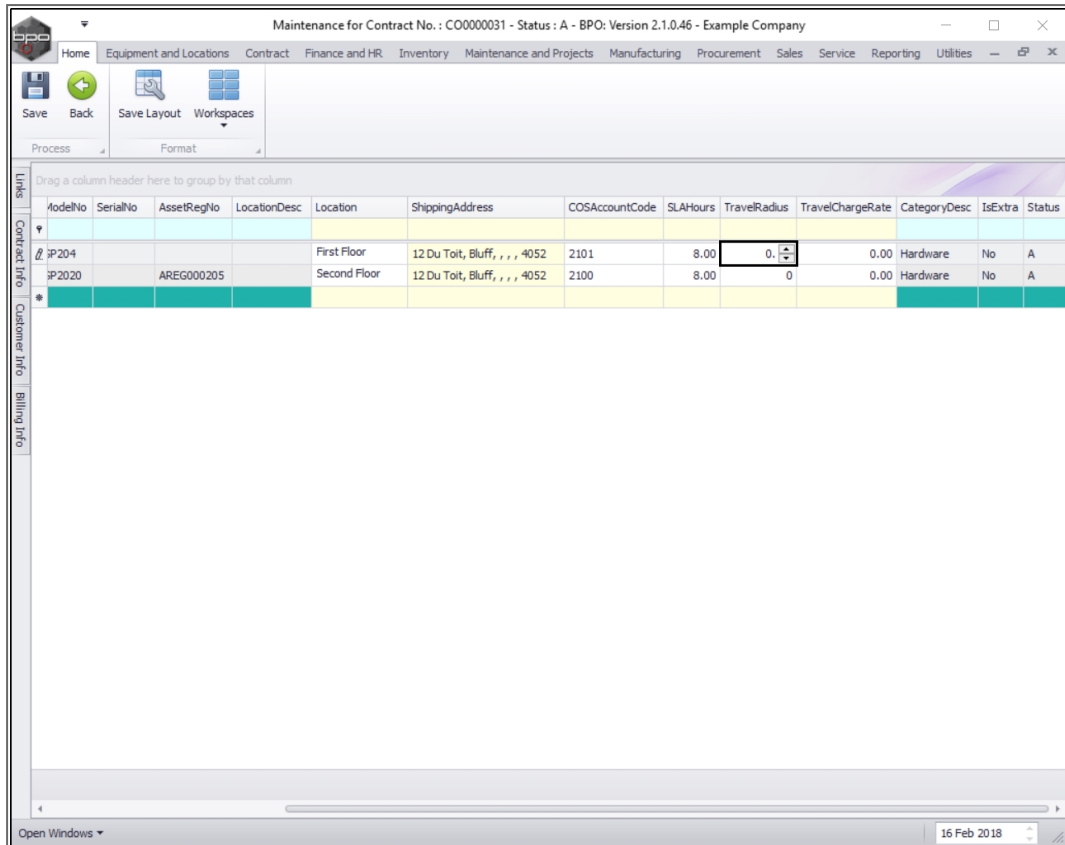
Drag a column header here to group by that column

ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
JP204			First Floor		12 Du Toit, Bluff, , , , 4052	2101	8.00	0	0.00	Hardware	No	A
JP2020		AREG000205	Reception		12 Du Toit, Bluff, , , , 4052	2100	8.00	0	0.00	Hardware	No	A

Links: Contract Info | Customer Info | Billing Info

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- In this example, we have clicked in the **Travel Radius** field of the first machine in the list.
 - The Travel Radius is currently **0**.



Maintenance for Contract No. : CO000031 - Status : A - BPO: Version 2.1.0.46 - Example Company

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

Save | Back | Save Layout | Workspaces

Process | Format

Drag a column header here to group by that column

ModelNo	SerialNo	AssetRegNo	LocationDesc	Location	ShippingAddress	COSAccountCode	SLAHours	TravelRadius	TravelChargeRate	CategoryDesc	IsExtra	Status
P204			First Floor		12 Du Toit, Bluff, , , , 4052	2101	8.00	0.	0.00	Hardware	No	A
P2020		AREG000205	Second Floor		12 Du Toit, Bluff, , , , 4052	2100	8.00	0	0.00	Hardware	No	A

Links: Contract Info | Customer Info | Billing Info

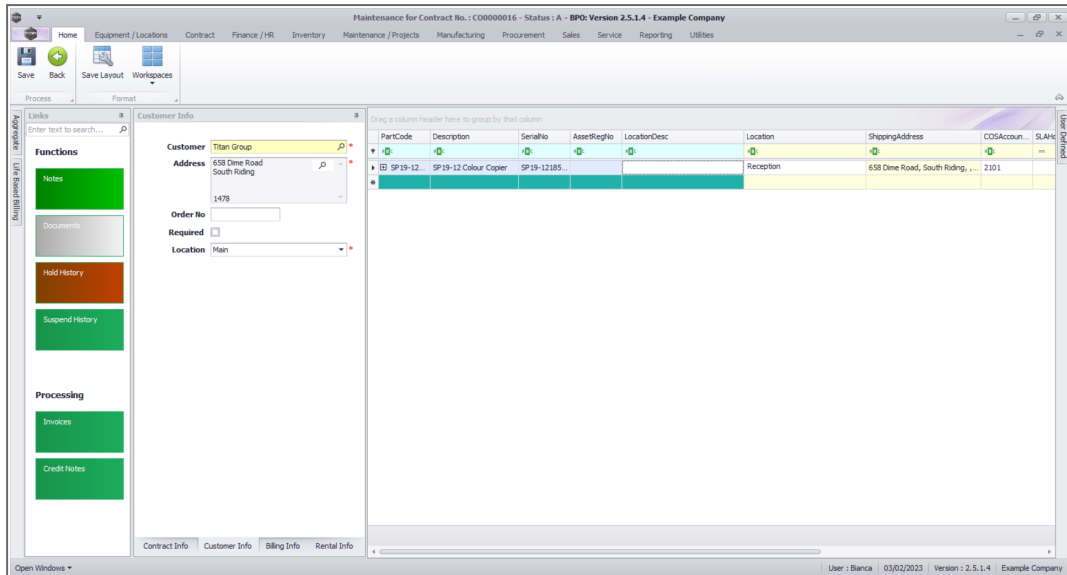
Open Windows | 16 Feb 2018

- Either **type in** or use the **arrow indicators** to select the updated travel radius for this contract item (in kilometres).
 - In this example, the Travel Radius has been changed to **42**.

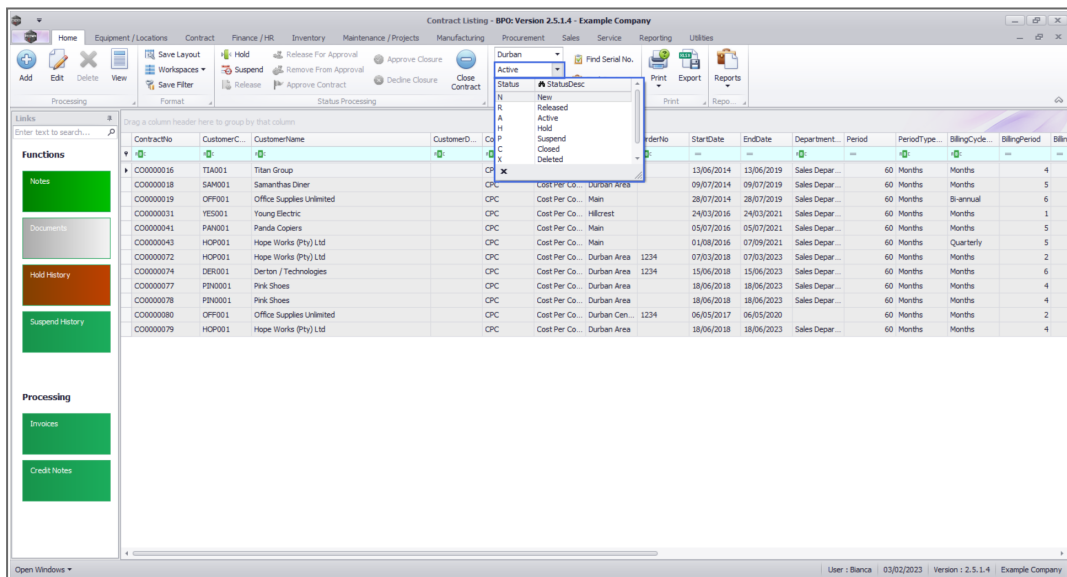
SAVE ITEM CHANGES

SAVE THE CONTRACT

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

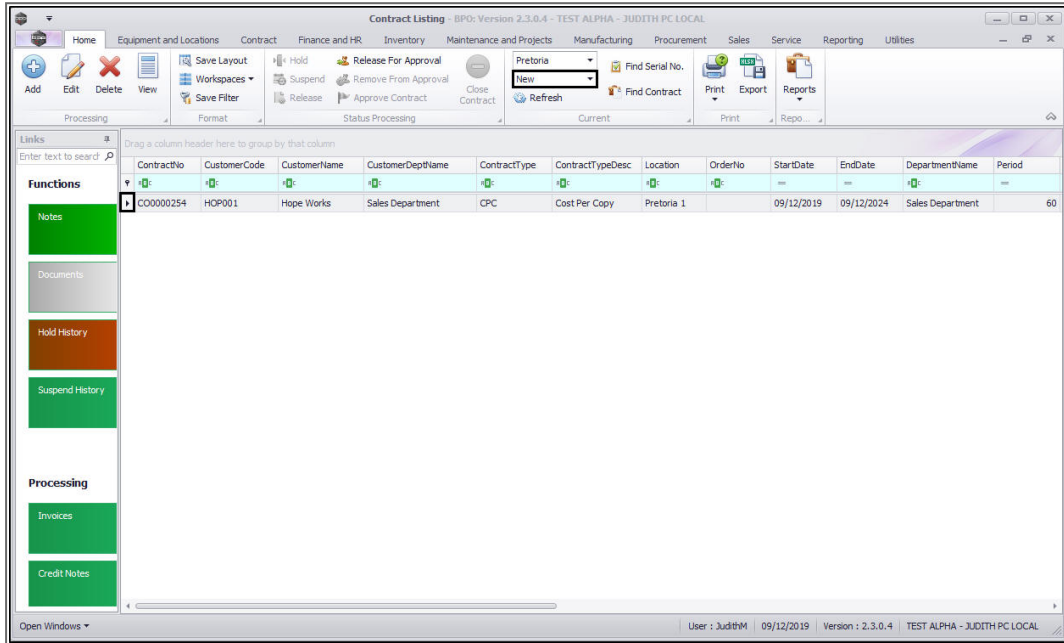


- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.



- **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.



NOTE ON CONTRACT TRIGGERS

- **Note:** If the item detail that was changed, was one of the **triggers** that would move the contract back into the **Released** status, then you will need to change the Contract Listing screen status to **Released** to be able to view the updated contract item details.

MNU.112.034

