

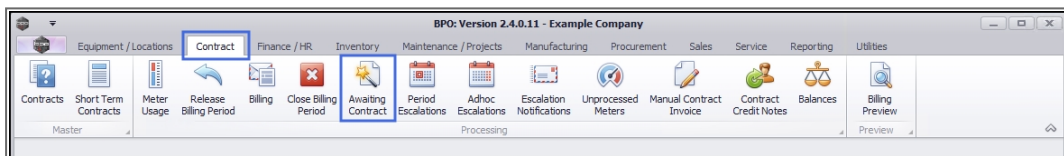
CONTRACT

AWAITING CONTRACT

This screen displays items 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](#))
- A or B-class [customer assets](#).

Ribbon Access: *Contract > Awaiting Contract*



The *Items Awaiting Contract* listing screen will be displayed.

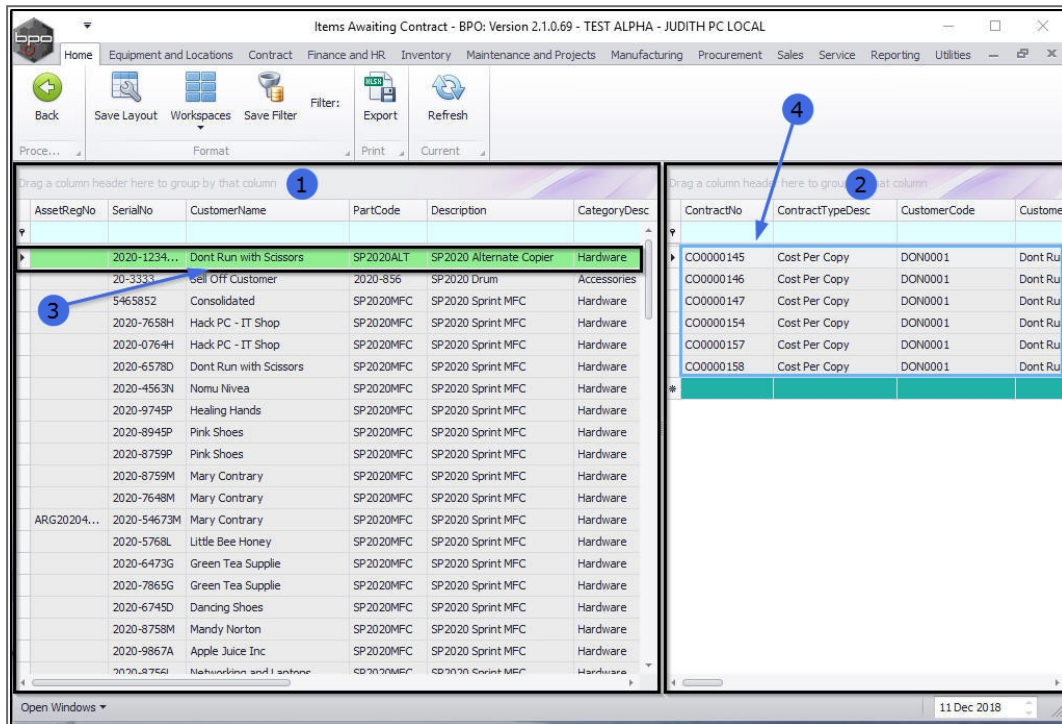
SCREEN OVERVIEW

The screen is divided into **2** data grids.

1. **Data grid 1:** displays all the items **waiting** to be allocated to a contract. These items can either be [customer assets](#) or [internal assets](#). For internal assets to be displayed, a **New Deal Rental** process has to be completed first.
2. **Data grid 2:** displays all the existing contracts for the **customer** linked to the machine serial no. selected in data grid 1.
3. For example in this image, a machine with serial no: **2020-12341IA** linked to customer **Don't Run with Scissors** is selected in data grid 1,

4. Therefore **all** contracts linked to customer **Don't Run with Scissors** are displayed in data grid 2.

- **Note:** **Deleted** or **Closed** contracts will not be displayed in this data grid.

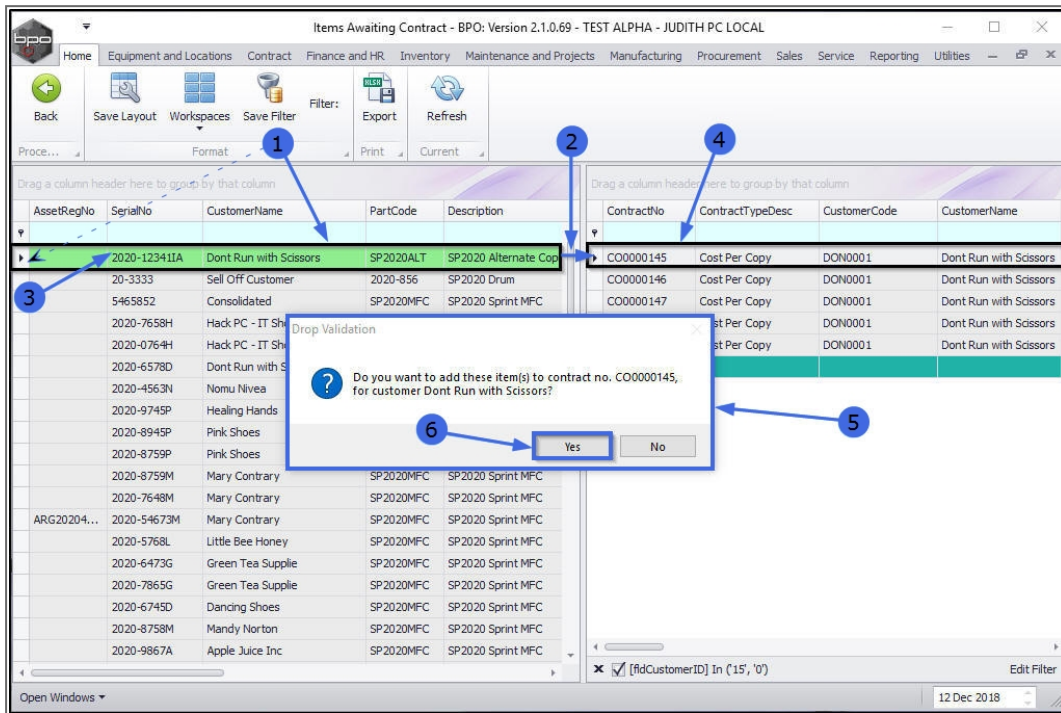


LINK SINGLE ITEM TO EXISTING CONTRACT

1. **Click** and **hold** on the contract item in data grid 1.
 - **Note:** You may need to click and hold from the row selector column in the row.
2. **Drag** the contract item to an existing contract displayed in data grid 2.
3. In this example, serial no. **2020-12341A** has been selected, and will be dragged and dropped onto
4. Contract no. **CO0000145**.
5. As it is 'dropped', a **Drop Validation** message box will pop up asking;

- Do you want to add these item(s) to contract no. [], for customer []?

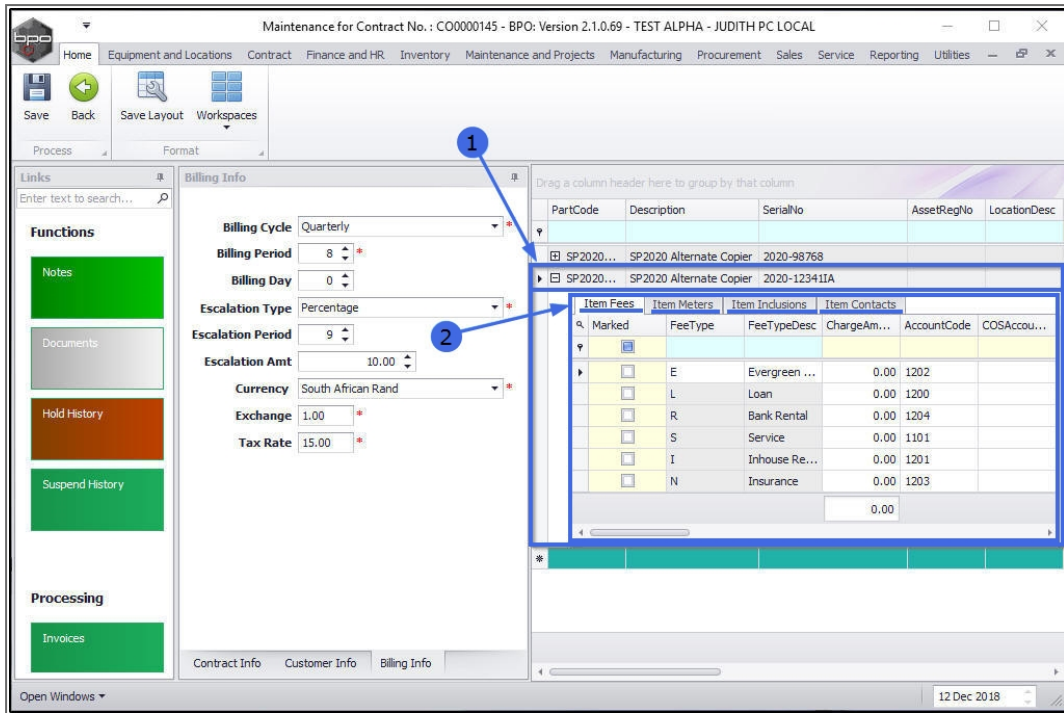
6. Click on **Yes**.



The **Maintenance for Contract No.: []** screen will open.

ADD ITEMS DETAILS/FEES

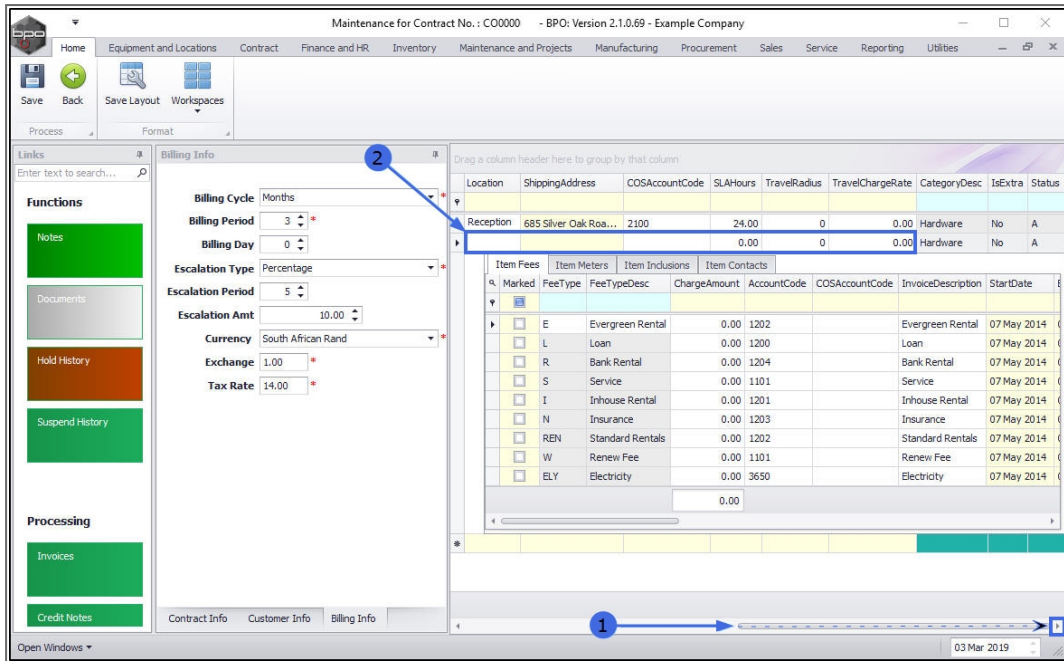
1. The contract item you have added will be listed last in the **Parts** data grid.
2. The **Items** frame sub grids - linked to this part - will be auto expanded and displayed, ready for adding information:
 - Item Fees
 - Item Meters
 - Item Inclusions
 - Items Contacts



1. **Scroll right** in the row of the contract item to view more information.

2. You can update/edit the following fields:

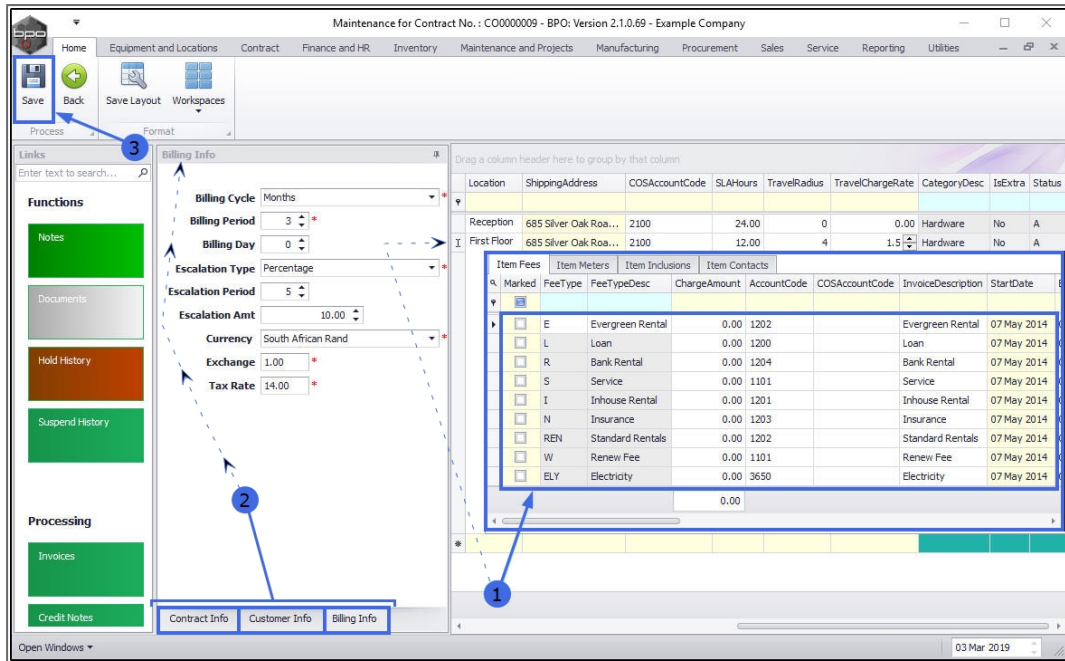
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



1. When you have added the Contract Item and Item Fee information as required,
2. You can move across to the Contract Information frames: **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel**. These can be left as is, unless a particular change has been requested and you are authorised to do so.

SAVE SINGLE LINKED ITEM

3. Click on **Save**.

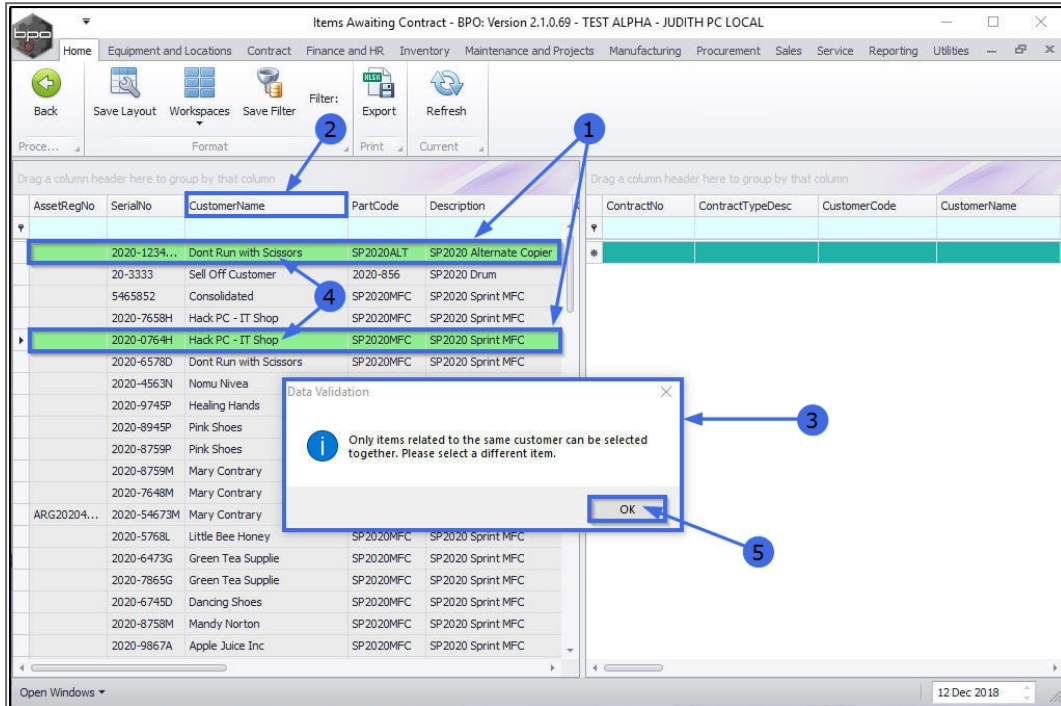


- The linked item will be **saved** to the contract and you will return to the **Items Awaiting Contract** screen.

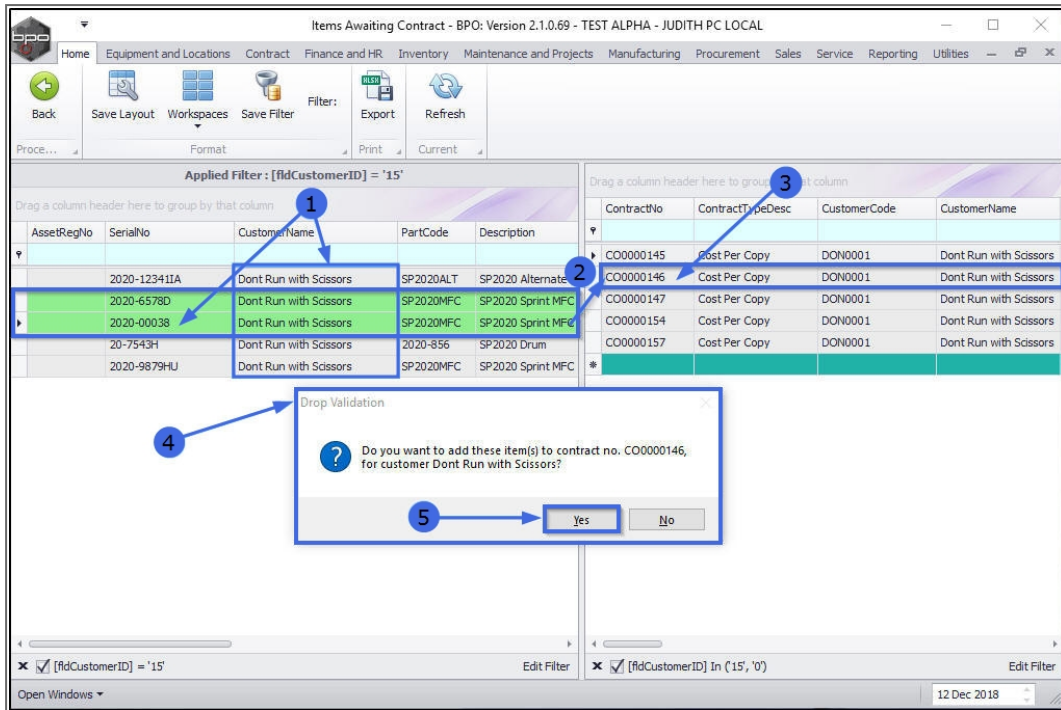
LINK MULTIPLE ITEMS TO EXISTING CONTRACT

1. In the **Items Awaiting Contract** screen, select the multiple items in data grid **1** that you wish to be linked to an existing contract.
 - In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.
2. **Important Note:** The items selected have to belong to the same customer.
3. If you select items belonging to different customers then a **Data Validation** message box will pop up advising you that;
 - **Only items related to the same customer can be selected together. Please select a different item.**

4. In this example an item linked to customer ***Don't Run with Scissors*** and another item linked to customer ***Hack PC - IT Shop*** have been incorrectly selected.
5. Click on ***OK*** to clear the message and restart the selection.



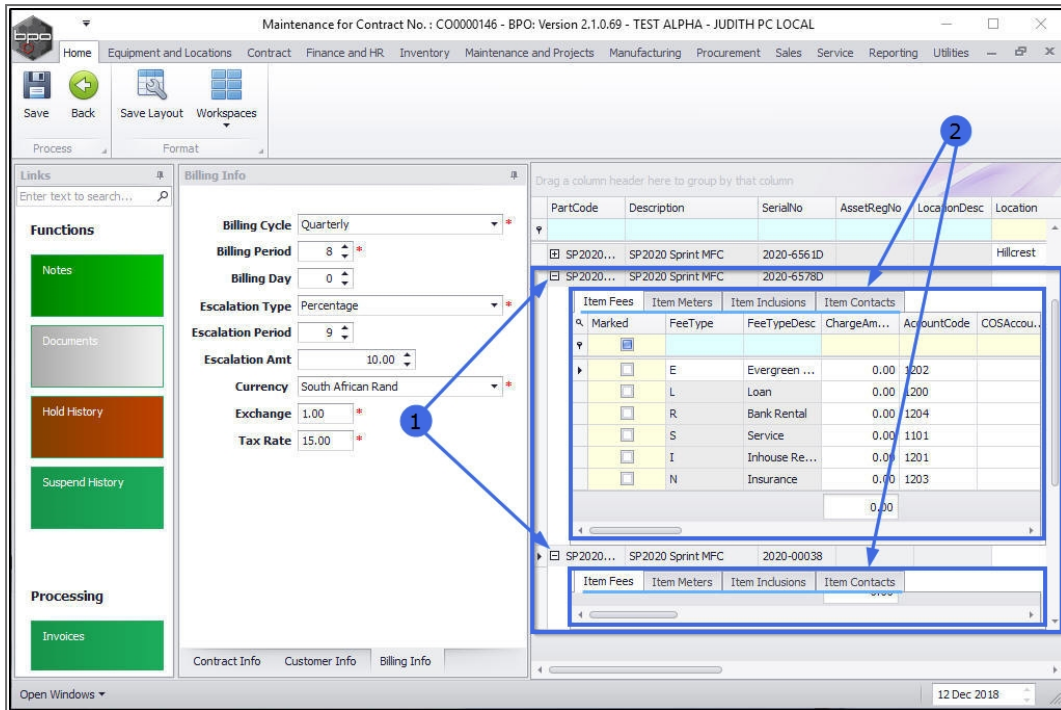
1. Select all the contract items that you wish to link.
2. ***Drag*** the items to an existing contract in data grid 2.
3. In this image, serial no **2020-00038** and **2020-6578D** have been selected, dragged and dropped on to contract no **CO0000146**.
4. A ***Drop Validation*** message box will pop up asking;
 - ***Do you want to add these item(s) to contract no. [] for customer []***
5. Click on ***Yes***.



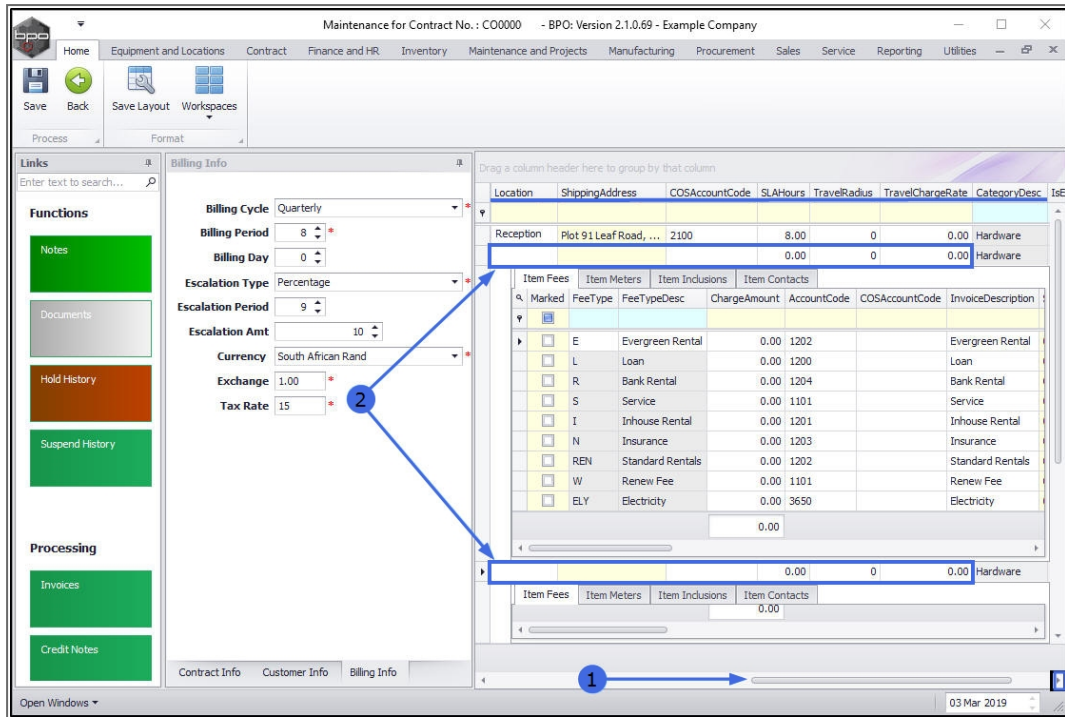
The *Maintenance for Contract No []* screen will be displayed.

ADD ITEM DETAILS/FEES

1. The items you are adding to the contract will be listed last in the **Parts** data grid.
2. The **Items sub grids** linked to these parts will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



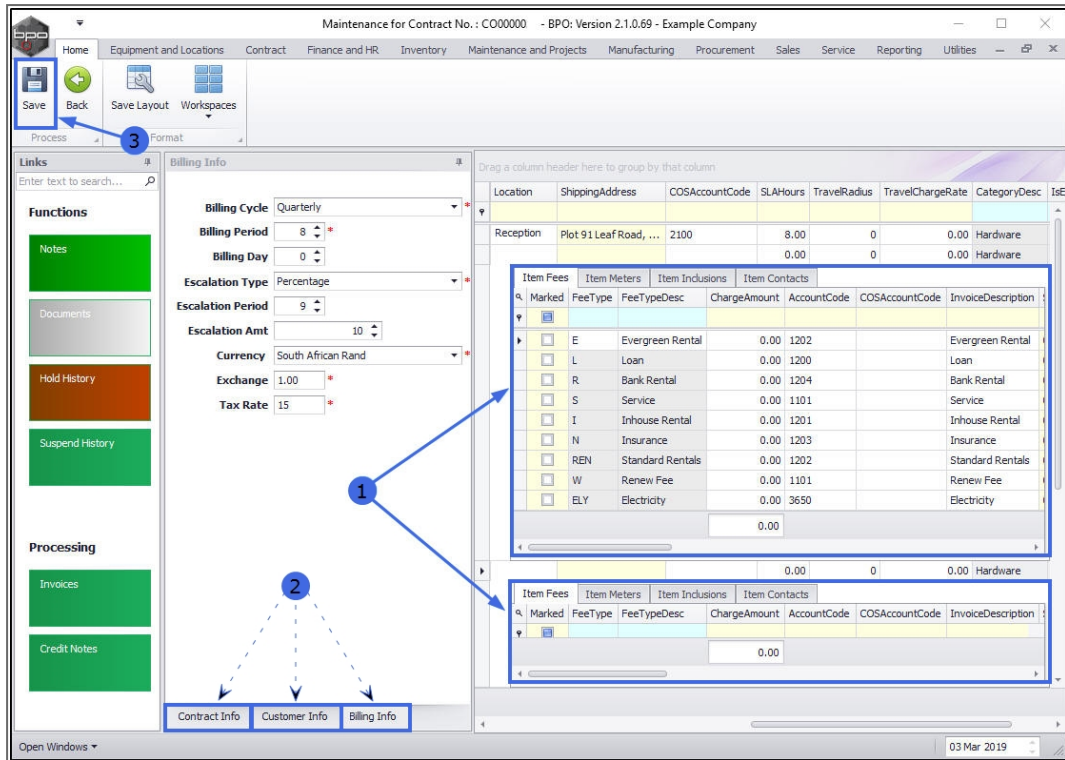
1. Scroll right to view all the contract item information.
2. You can update/edit the following fields:
 - Link a **Location**
 - Link a **Shipping Address**
 - Link a **COS Account Code**
 - Link a **SLA Hours**
 - Link a **Travel Radius**
 - Link a **Travel Charge**



1. You can input relevant data for the **Parts (Equipment Item) frame**.
2. Leave the **Contract Info Panel, Customer Info Panel and Billing Info Panel** as is.

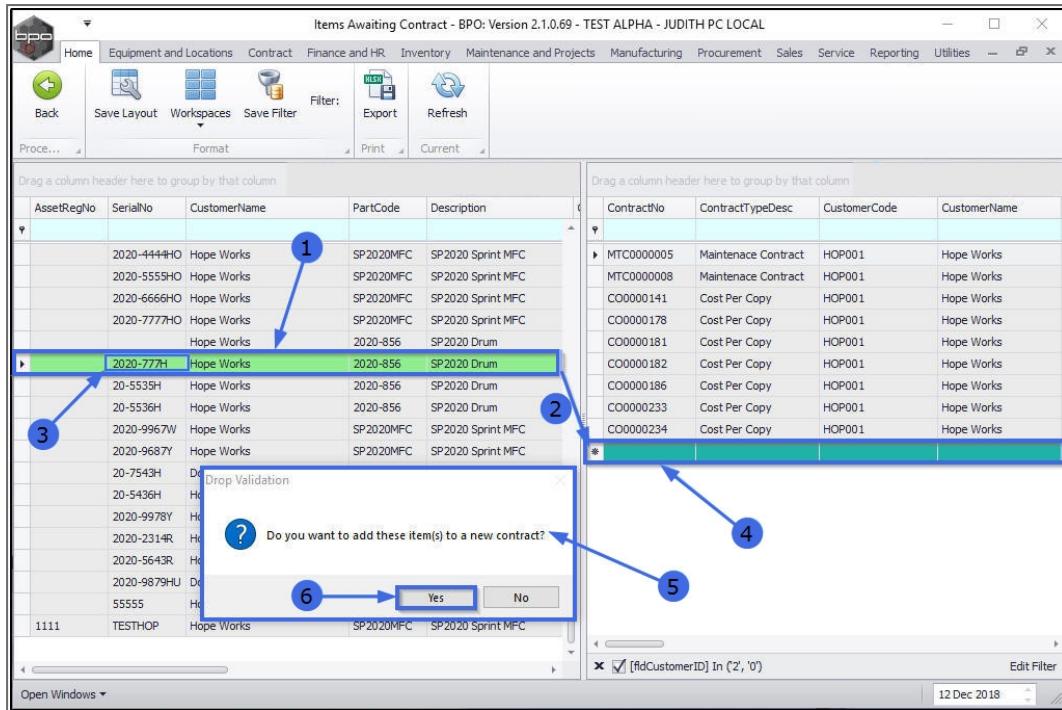
SAVE MULTIPLE LINKED ITEMS

3. Click on **Save**.

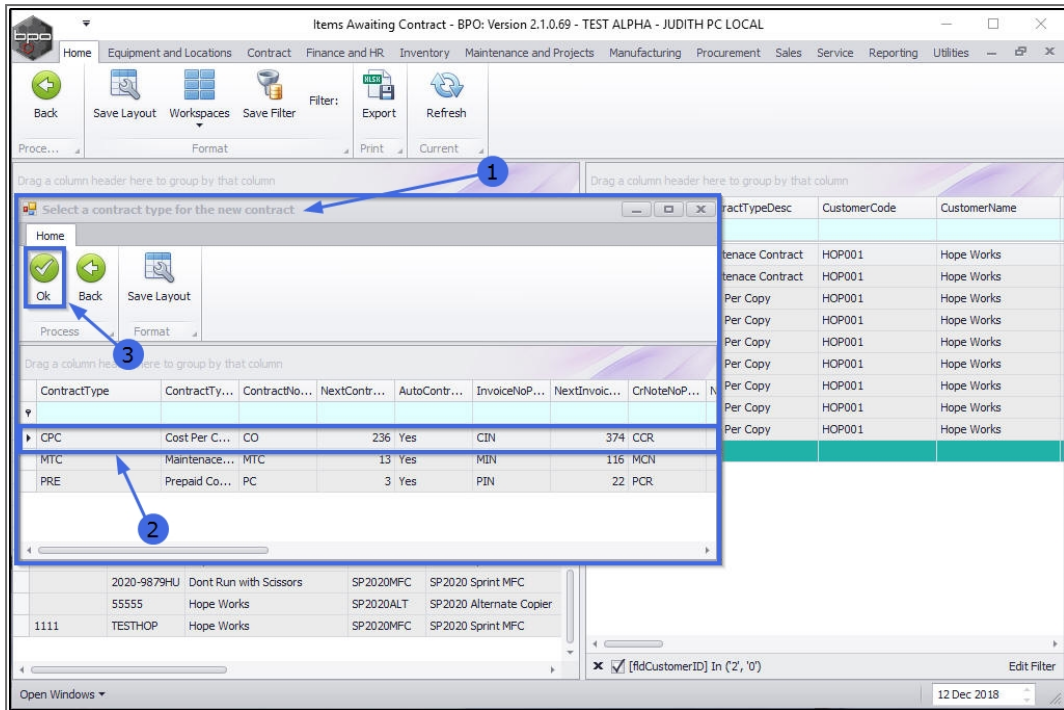


LINK SINGLE ITEM TO A NEW CONTRACT

1. In the *Items Awaiting Contract* screen, click on the single item in data grid **1** that you wish to add to a *new* contract
2. Drag the item to the last, blank row in data grid **2**. This row contains an asterisk in the row selector column.
3. In this example, serial no **2020-777H** has been selected, dragged and dropped to
4. the final *blank row* in data grid **2**.
5. A **Drop Validation** message box will pop up asking;
 - *Do you want to add these item(s) to a new contract?*
6. Click on **Yes**.



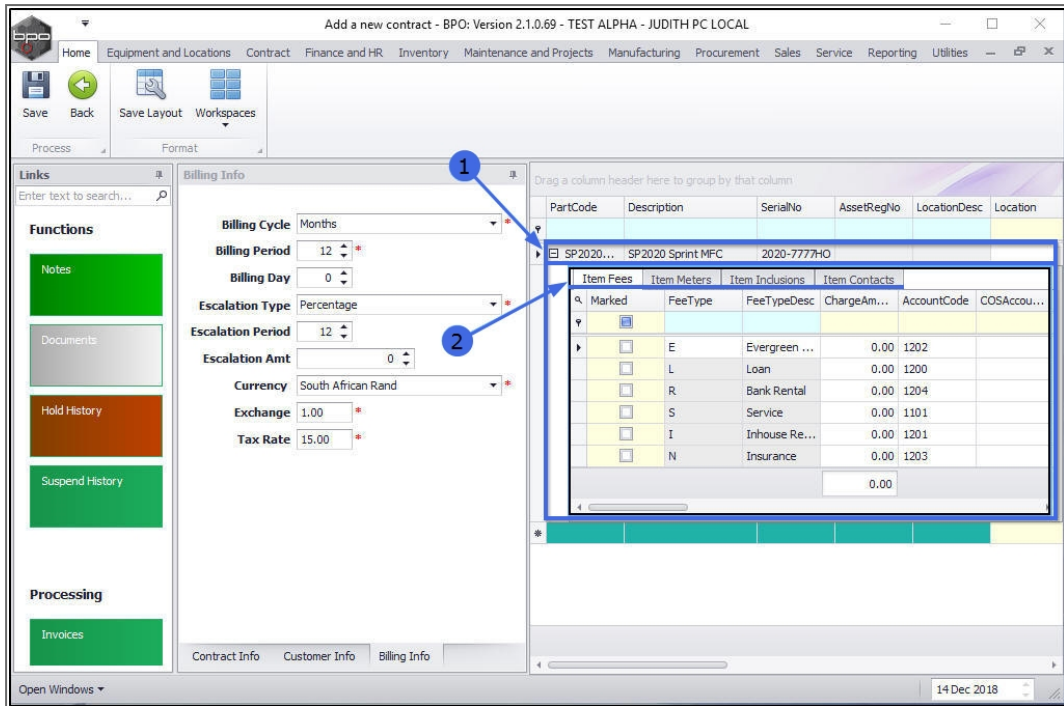
1. The **Select a contract type for the new contract** screen will pop up.
2. **Click anywhere** in the **row** of the **contract type** you wish to add.
3. Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected



The **Add a new contract** screen will be displayed.

ADD ITEM DETAILS/FEES

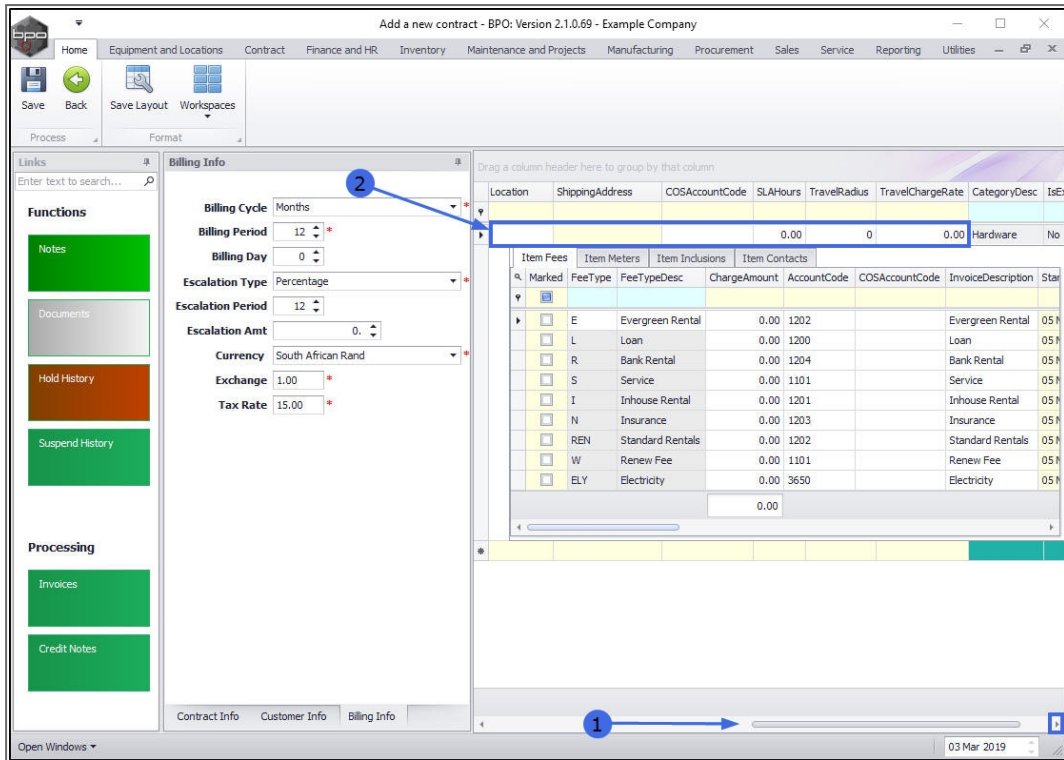
1. The item you are adding to the new **contract** will be listed in the **Parts** data grid.
2. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract item information.

2. You can update/edit the following fields:

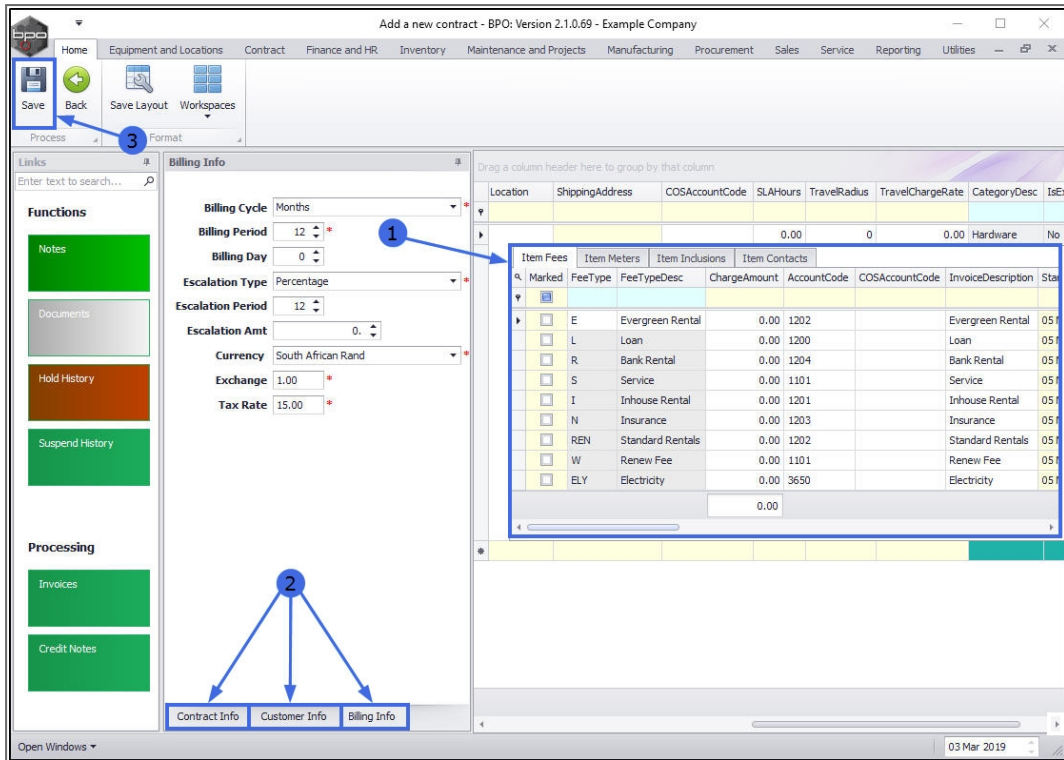
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



1. You can input relevant data for the **Part Item frame**.
2. Add the **new** contract details to the; **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** panels.

SAVE LINKED ITEM

1. Click on **Save**.



- The item will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

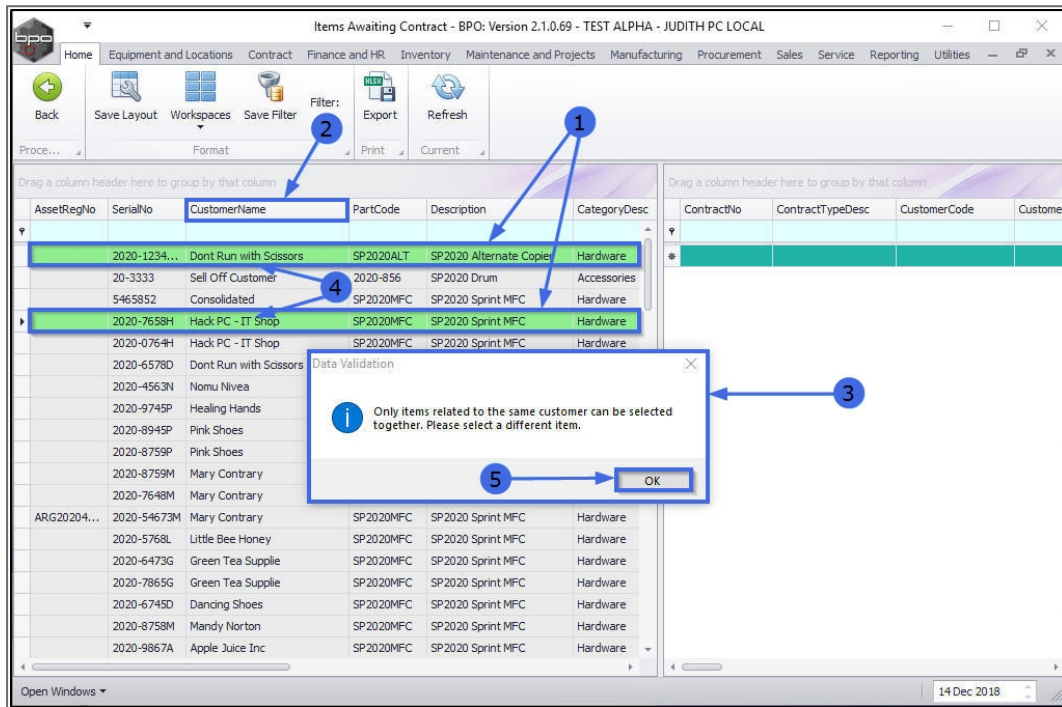
LINK MULTIPLE ITEMS TO A NEW CONTRACT

1. In the **Items Awaiting Contract** screen, select the multiple items in data grid **1** that you wish to link to a **new** contract.

In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

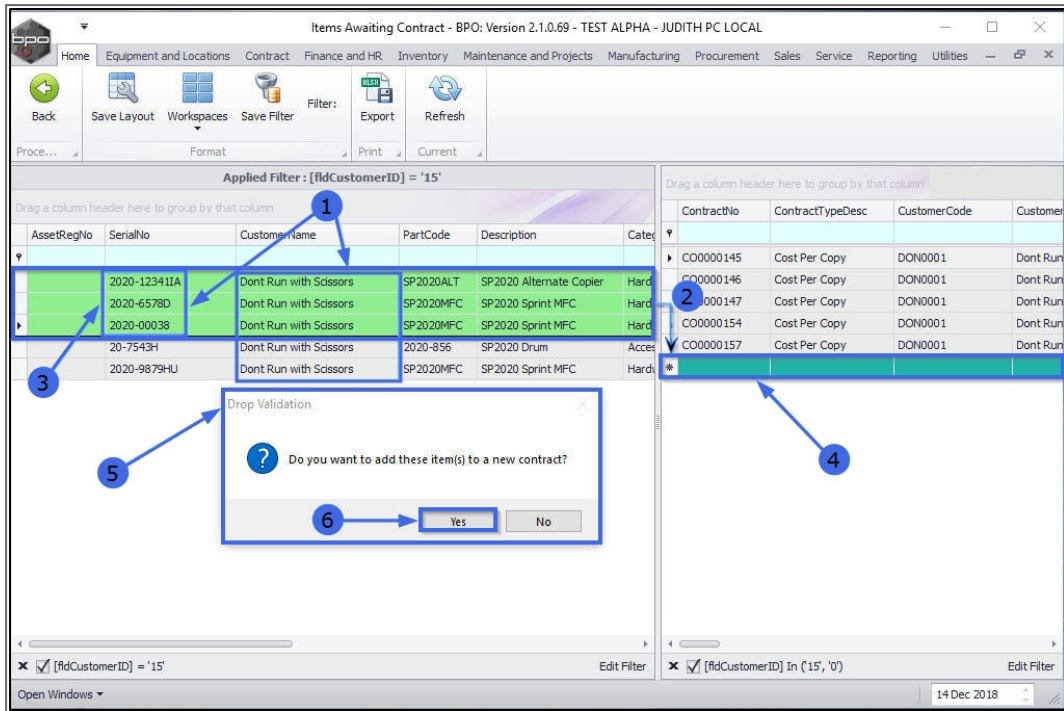
2. **Important Note:** The items selected have to belong to the **same** customer.
3. If you select items belonging to different customers then a **Data Validation** message box will pop up advising you that;

- **Only items related to the same customer can be selected together. Please select a different item.**
4. In this example an item linked to customer **Don't Run with Scissors** and another item linked to customer **Hack PC - IT Shop** have been incorrectly selected.
 5. Click on **OK** to clear the message and restart the selection.

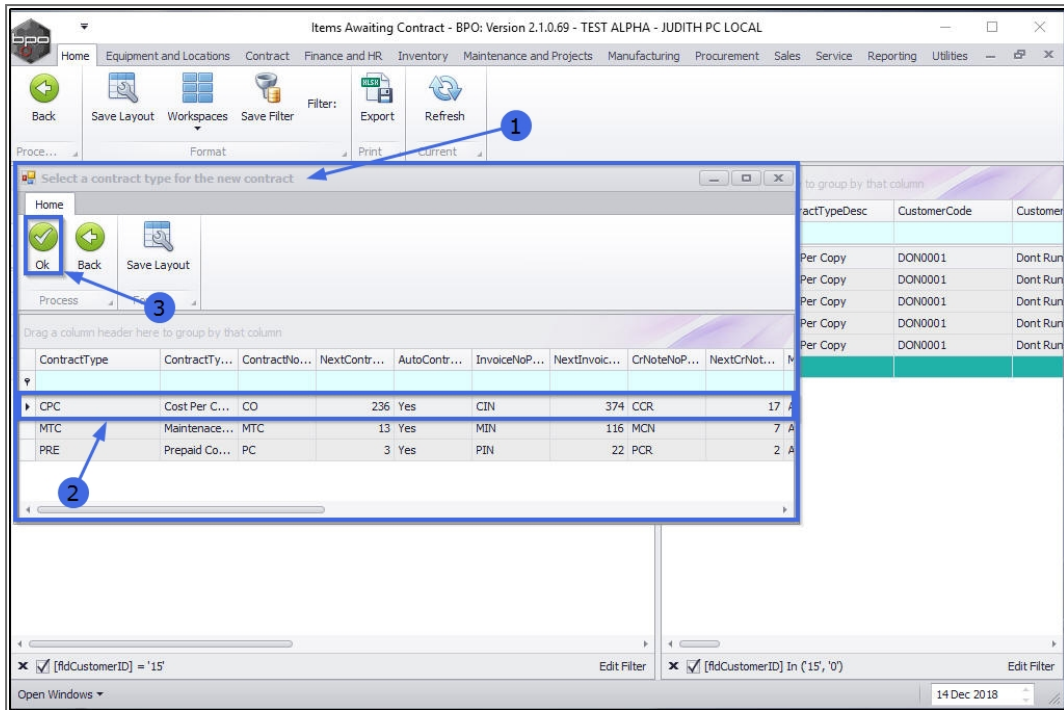


1. As you select the second item line linked to the same customer, the system will auto filter the item lines in data grid **1**, to display only the items linked to that customer.
2. **Drag** the items to the last, blank row in data grid 2. This row contains an asterisk in the row selector column.
3. In this image, serial no's **2020-12341IA**, **2020-6578D** and **2020-00038** have been selected, dragged and dropped on to
4. the final **blank row** in data grid **2**.
5. A **Drop Validation** message box will pop up asking;
 - **Do you want to add these item(s) to a new contract?**

6. Click on **Yes**.



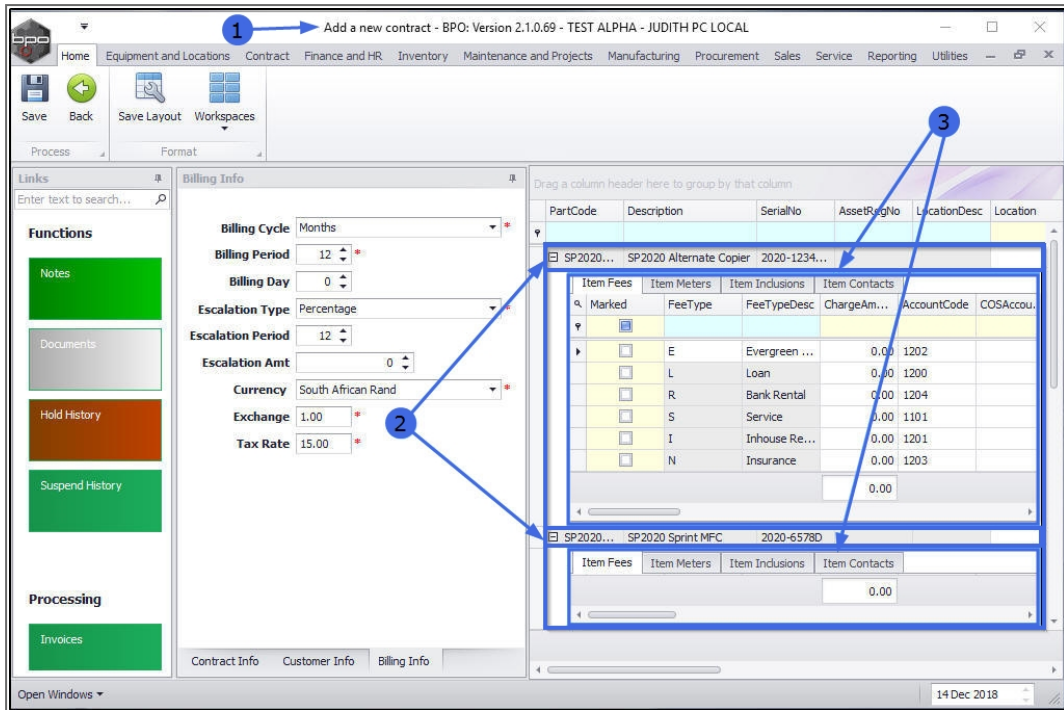
1. The **Select a contract type for the new contract** screen will pop up.
2. **Click anywhere** in the **row** of the **contract type** you wish to add.
3. Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected.



1. The **Add a new contract** screen will be displayed.
2. The items that you are adding to the **new** contract will be listed in the **Parts** data grid.

ADD ITEM DETAILS/FEES

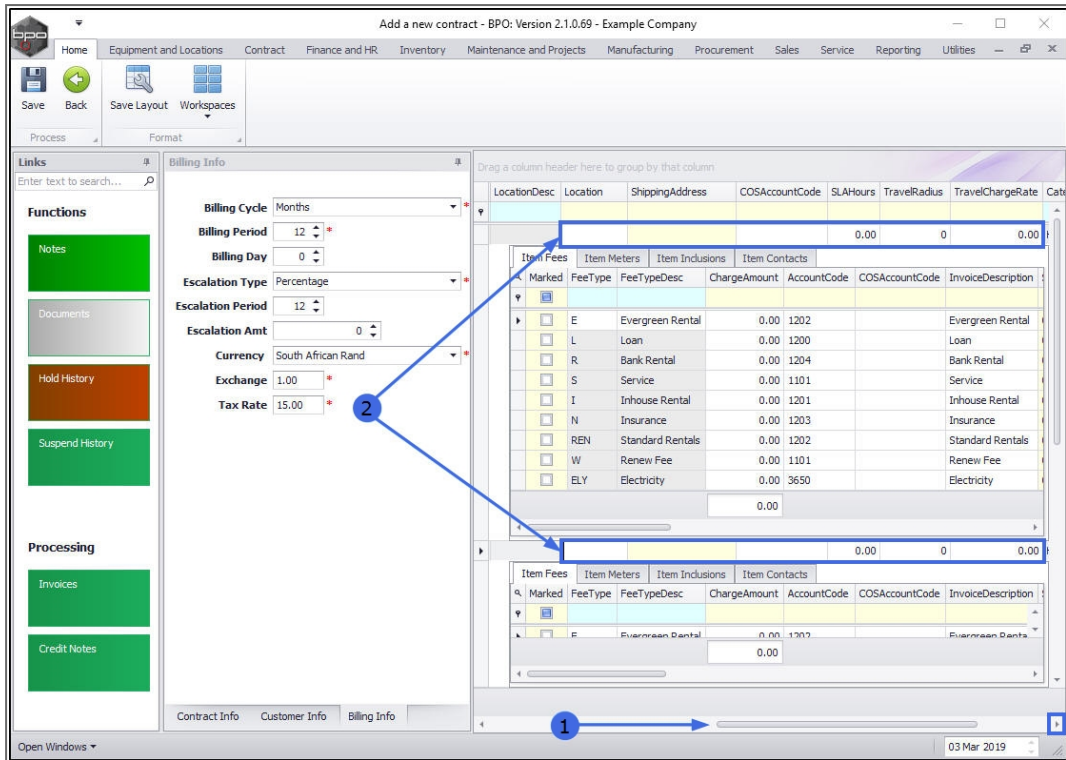
1. The **Items sub grids** linked to this part will be auto expanded and displayed ready for adding information:
 - **Items Fees**
 - **Item Meters**
 - **Item Inclusions**
 - **Items Contacts**



1. Scroll right to view all the contract items information.

2. You can update/edit the following fields:

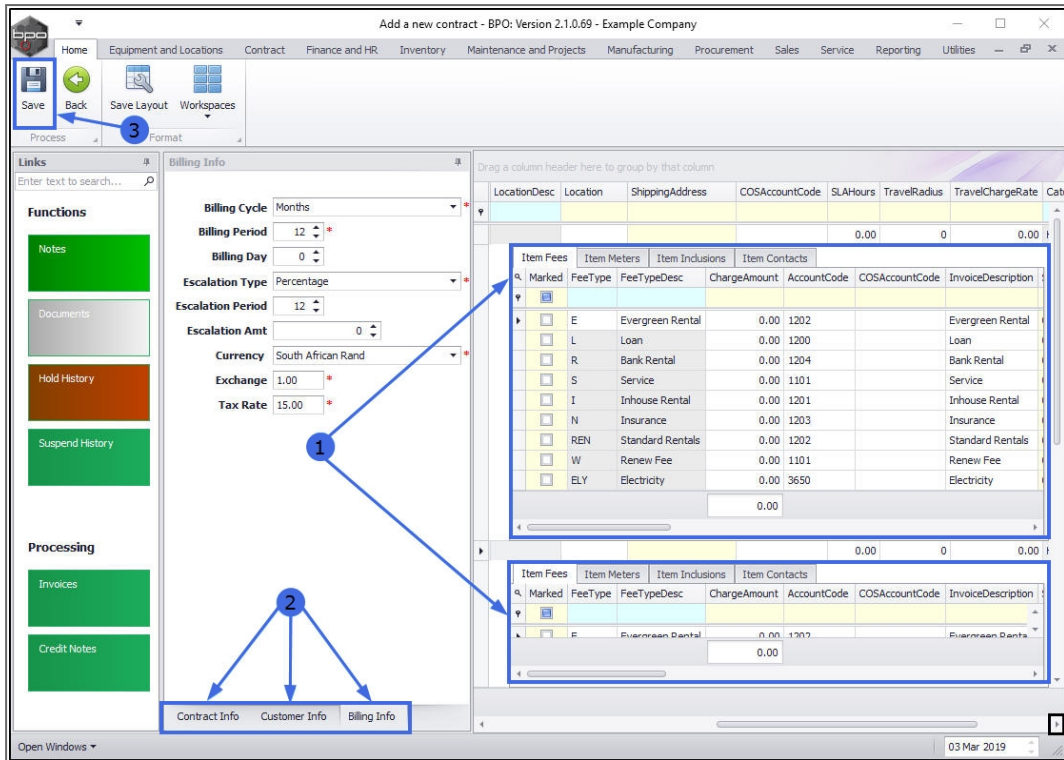
- Link a **Location**
- Link a **Shipping Address**
- Link a **COS Account Code**
- Link a **SLA Hours**
- Link a **Travel Radius**
- Link a **Travel Charge**



1. You can input relevant data for the **Parts Item frames**.
2. Add the **new** contract details to the; **Contract Info Panel**, **Customer Info Panel** and **Billing Info Panel** panels.

SAVE MULTIPLE LINKED ITEMS

1. Click on **Save**.



- The items will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

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