

CONTRACTS

CONTRACT CLOSURE APPROVAL

When a contract is closed, the status is changed ***End of Contract***, and must either be Approved to fully process the closure, or Declined in order to release from the Closure process.

Various closure actions could occur depending on your company's configuration and type of contract item(s).

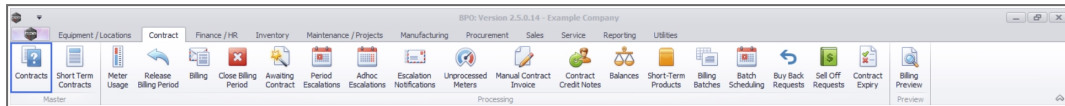
Contracts could have one or multiple items linked, such as:

- Locations (no action required for the item)
- Client Assets (no action required, unless the equipment requires Buy Back - Refer to "[The Contract Expiry Listing Screen](#)" on [page 1](#))
- Internal Assets (rental equipment that must be returned to store, unless the equipment requires Sell Off)
- Loan Units (internal assets loaned to the client that must be returned to store)

In order for assets to be returned to store, a work order is required against which a return request is raised, that can then be actioned by the storeman when the item is physically returned. The work order and return request are created by BPO during the contract closure process.

Your company configuration may be set to raise a **contract closure call**. This will create a Call with an underlying work order against which the asset can be returned. The benefit of this process, is that a technician can be assigned to the call to collect the asset from the client premises.

Ribbon Select **Contract** > **Contracts**



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

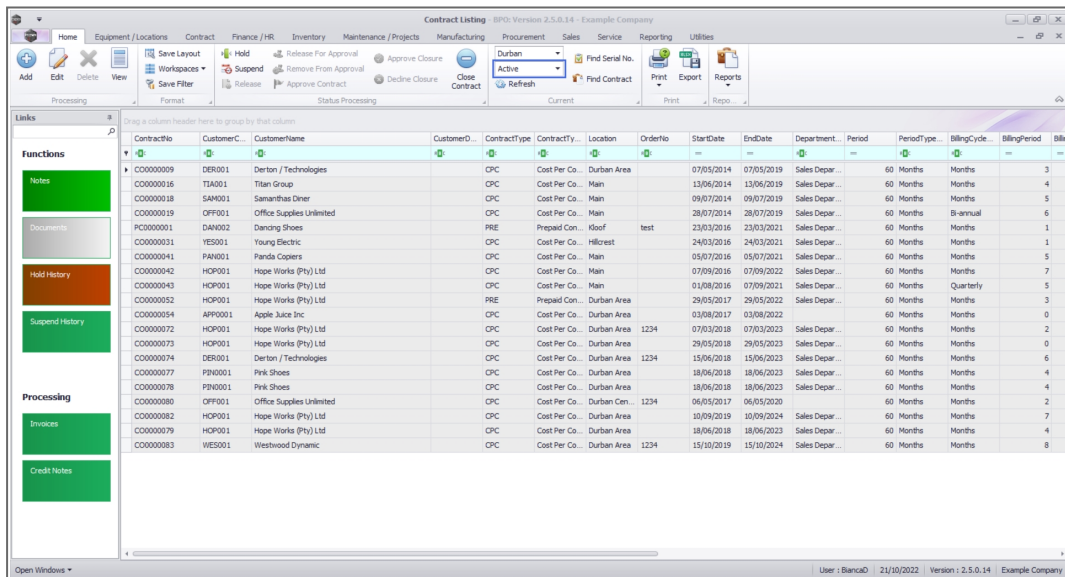
Select the Site

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.

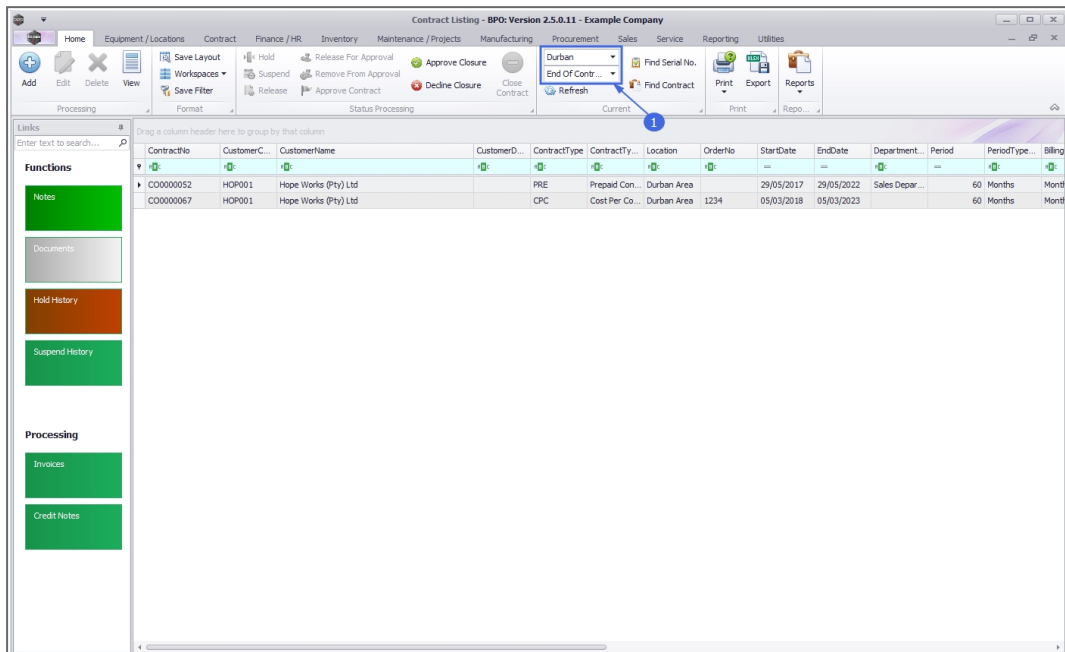
Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.



ContractNo	CustomerC	CustomerName	CustomerO	ContractType	ContractTy	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 Depar...	60	Months	Months		3
CO000018	TSAG01	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depar...	60	Months	Months		4
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depar...	60	Months	Months		5
PC000001	DAN002	Dancing Shoes		PRI	Prepaid Con...	Ksoof	test	23/03/2016	23/03/2021	Sales Depar...	60	Months	Months		1
CO000031	YES001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depar...	60	Months	Months		1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depar...	60	Months	Months		5
CO000042	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		07/09/2016	07/09/2021	Sales Depar...	60	Months	Months		7
CO000043	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depar...	60	Months	Quarterly		5
CO000052	HOP001	Hope Works (Pty) Ltd		PRI	Prepaid Con...	Durban Area		29/05/2017	29/05/2022	Sales Depar...	60	Months	Months		3
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co.	Durban Area		03/08/2017	03/08/2022		60	Months	Months		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
CO000073	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		29/05/2018	29/05/2023	Sales Depar...	60	Months	Months		0
CO000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depar...	60	Months	Months		6
CO000077	PHN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months		4
CO000078	PHN001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months		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
CO000082	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		10/09/2019	10/09/2024	Sales Depar...	60	Months	Months		7
CO000079	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60	Months	Months		4
CO000083	WES001	Westwood Dynamic		CPC	Cost Per Co.	Durban Area	1234	15/10/2019	15/10/2024	Sales Depar...	60	Months	Months		8

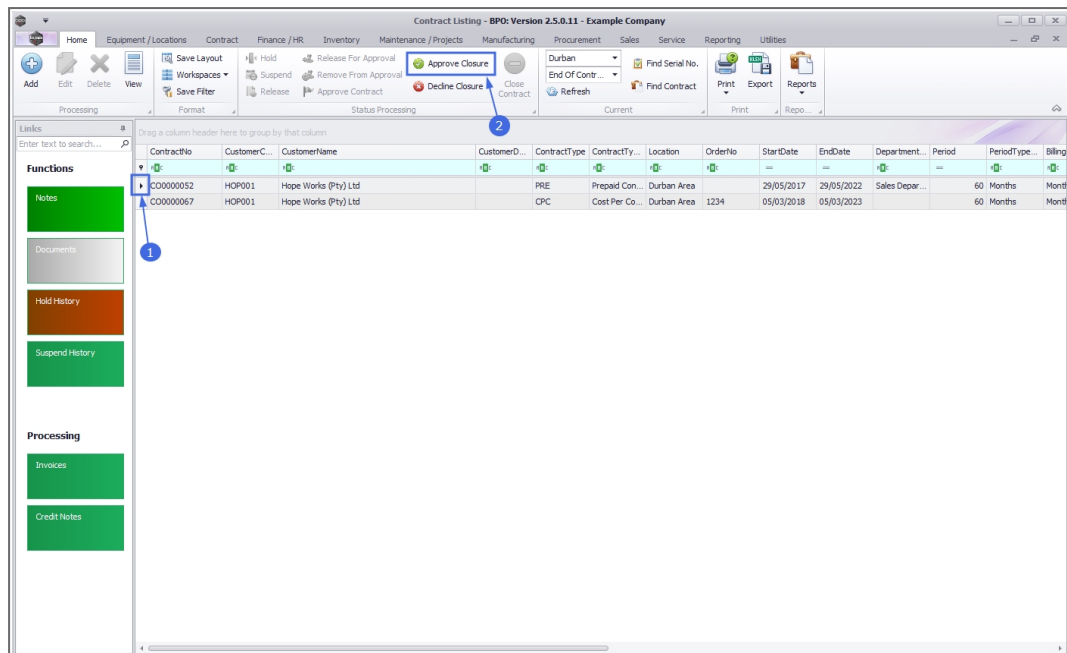
END OF CONTRACT

- Select the **End of Contract** status.



APPROVE CONTRACT CLOSURE

- Select the contract.
- Click on the **Approve Closure** button.

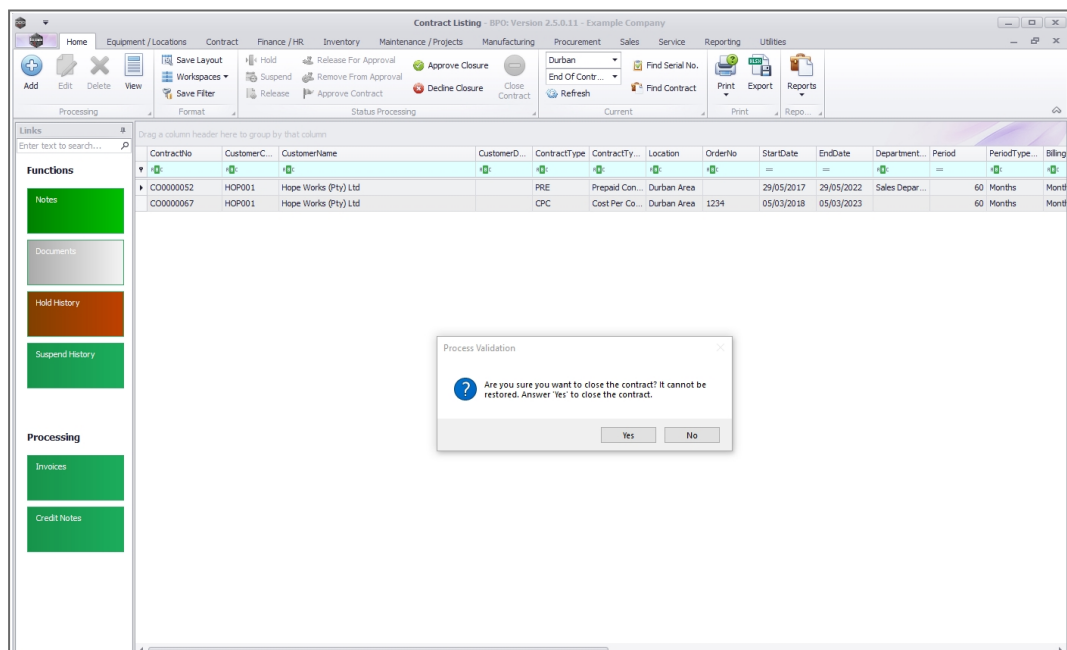


A message box will come up, asking:

Are you sure you want to close the contract? It cannot be restored.

Answer 'Yes' to close the Contract.

- Click on the **Yes** button.

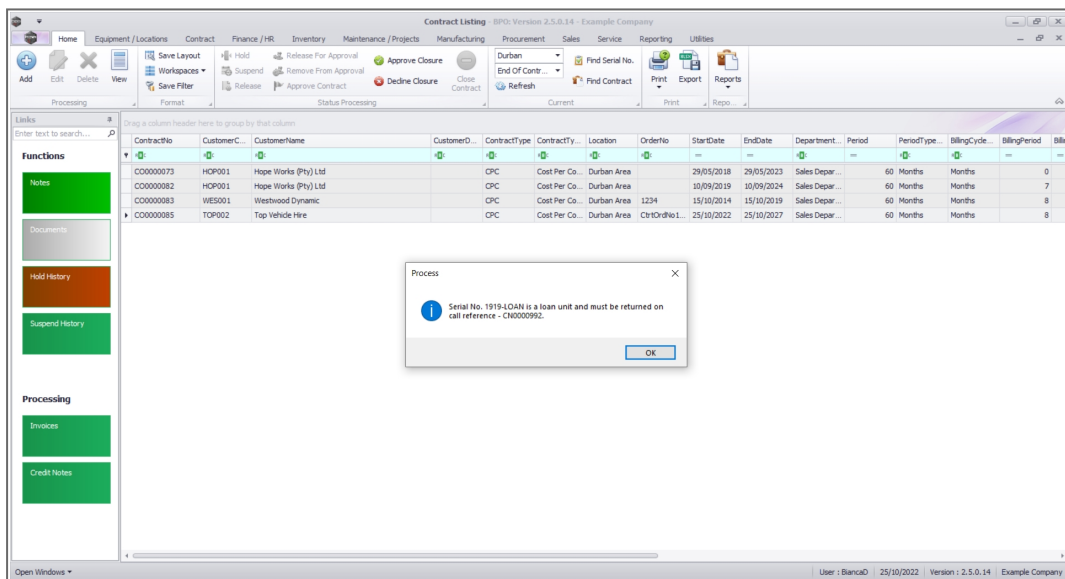


Loan Unit on Contract

If a message box will comes up, noting: ***Serial No. [serial number] is a loan unit and must be returned on call reference - [call number].*** then the contract closure cannot be completed.

You will need to follow this process:

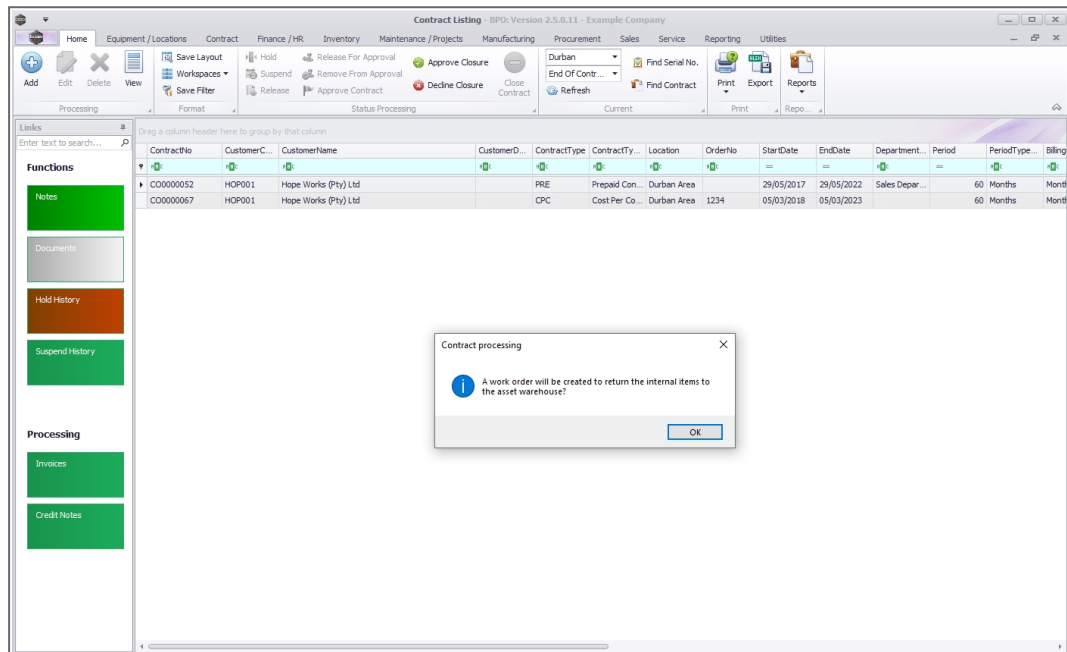
- [Decline Contract Closure](#) (this will move the contract to Released status)
- [Release Contract for Approval](#) (this will move the contract to Active status)
- [Remove the Loan Unit from the contract](#)
- [Close Contract](#)
- Return here to Approve Contract Closure



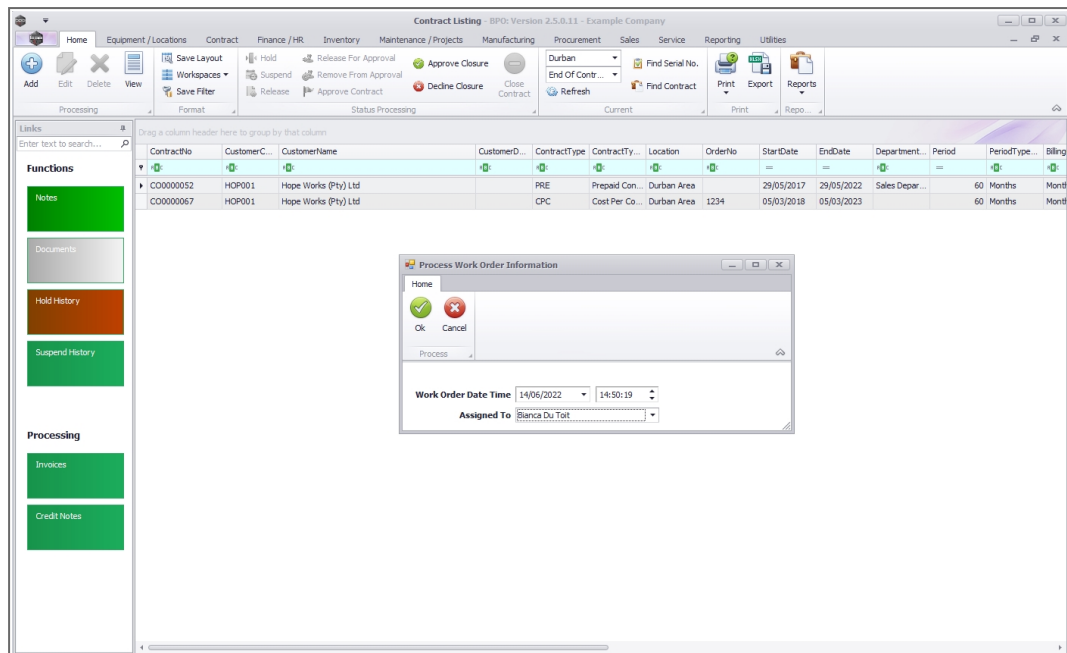
Internal Asset Return via Work Order

If a message box will come up, noting: ***A work order will be created to return the internal assets to the warehouse*** then one or more internal assets exist on the contract which must be returned to store.

- Click on the **Ok** button.



- The Process Work Order Information screen will come up.
- Select the **Work Order Date** and **Assigned To** employee.
- Click on **Ok**.

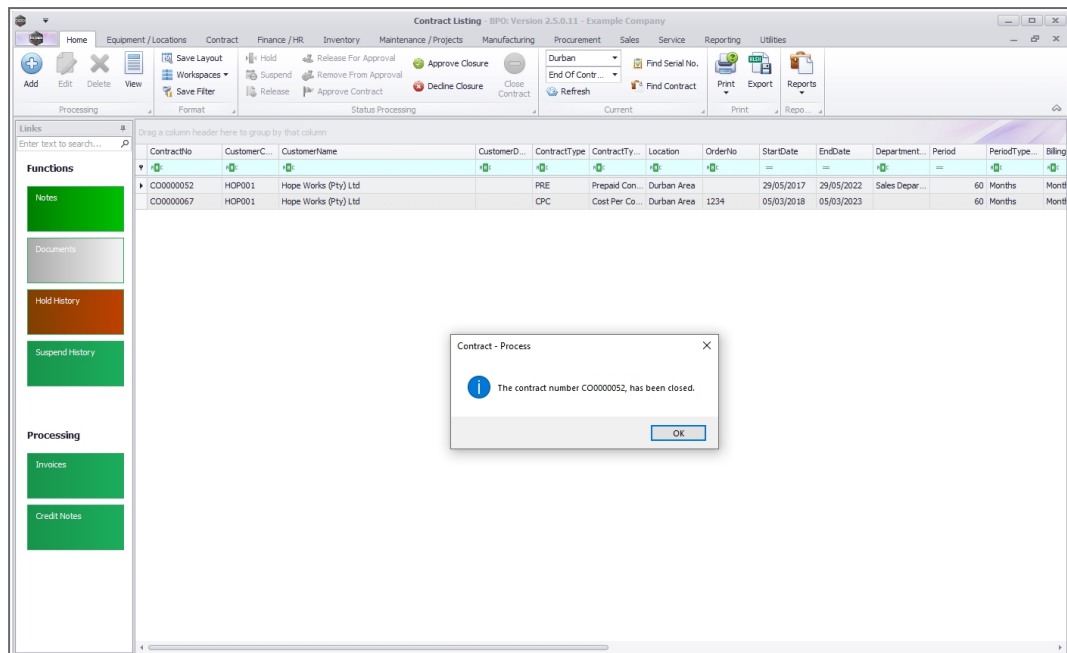


The storeman will need to action the [Return Request](#) that is auto created.

If your company configuration is set to raise a **contract closure call**, you can [assign a Technician to the call](#) to collect the item before the storeman processes the [Return Request](#).

Closure Confirmation

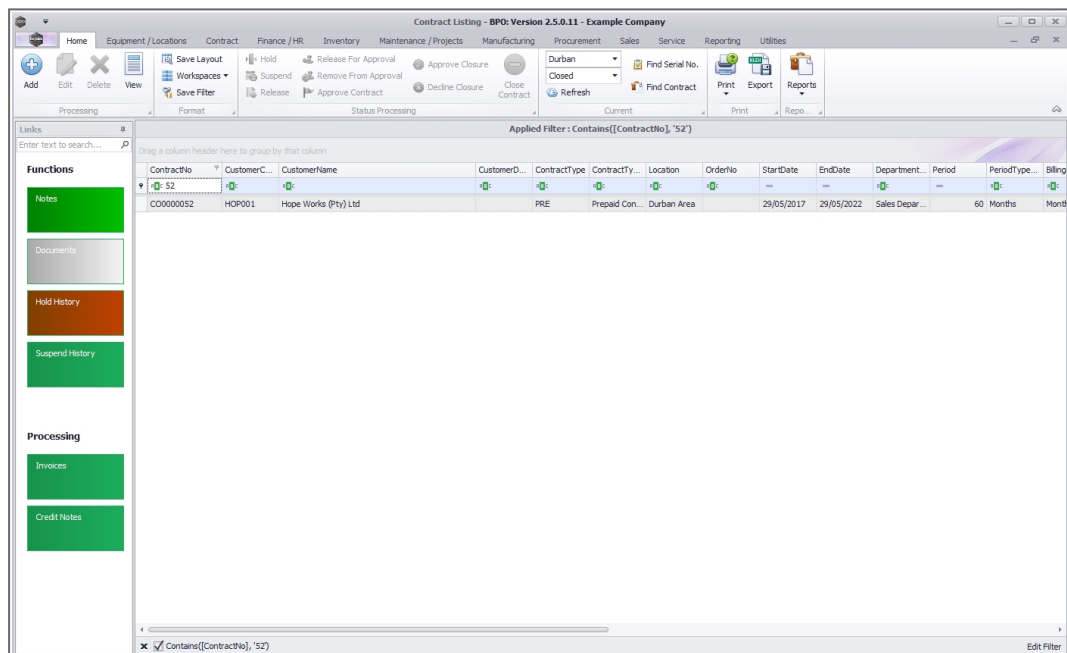
- A message box will come up, noting: ***The contract number [contract number], has been closed.***
- Click on the **Ok** button.



The screenshot shows the 'Contract Listing' application window. A modal dialog titled 'Contract - Process' is displayed in the center, containing the message: 'The contract number CO0000052, has been closed.' with an 'OK' button.

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTY...	Location	OrderNo	StartDate	EndDate	Department...	Period	PeriodType...	Billing
CO0000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Durban Area	1234	29/05/2017	29/05/2022	Sales Deper...	60	Months	Mont
CO0000067	HOP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		05/03/2018	05/03/2023		60	Months	Mont

- The contract status will be changed to **Closed**.



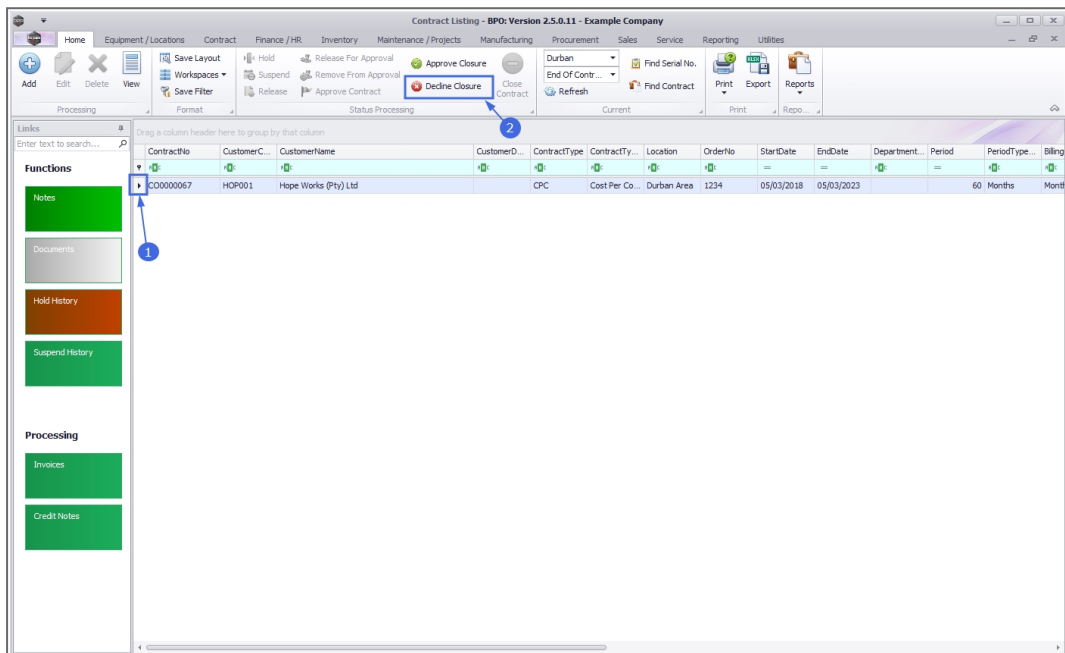
The screenshot shows the 'Contract Listing' application window after the contract closure. The contract 'CO0000052' now has a status of 'Closed' in the 'ContractType' column. The 'Applied Filter' is set to 'Contains([ContractNo], '52')'.

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTY...	Location	OrderNo	StartDate	EndDate	Department...	Period	PeriodType...	Billing
CO0000052	HOP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Durban Area		29/05/2017	29/05/2022	Sales Deper...	60	Months	Mont

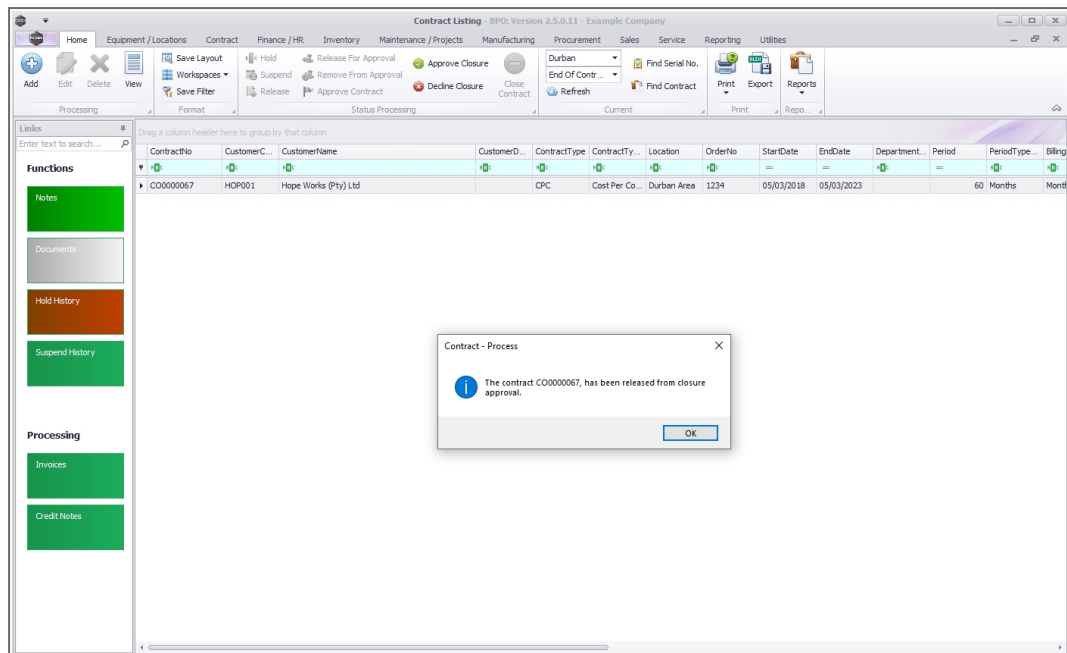
DECLINE CONTRACT CLOSURE

If the contract was closed in error, or further processing is required before the contract should be closed, then Decline the Closure.

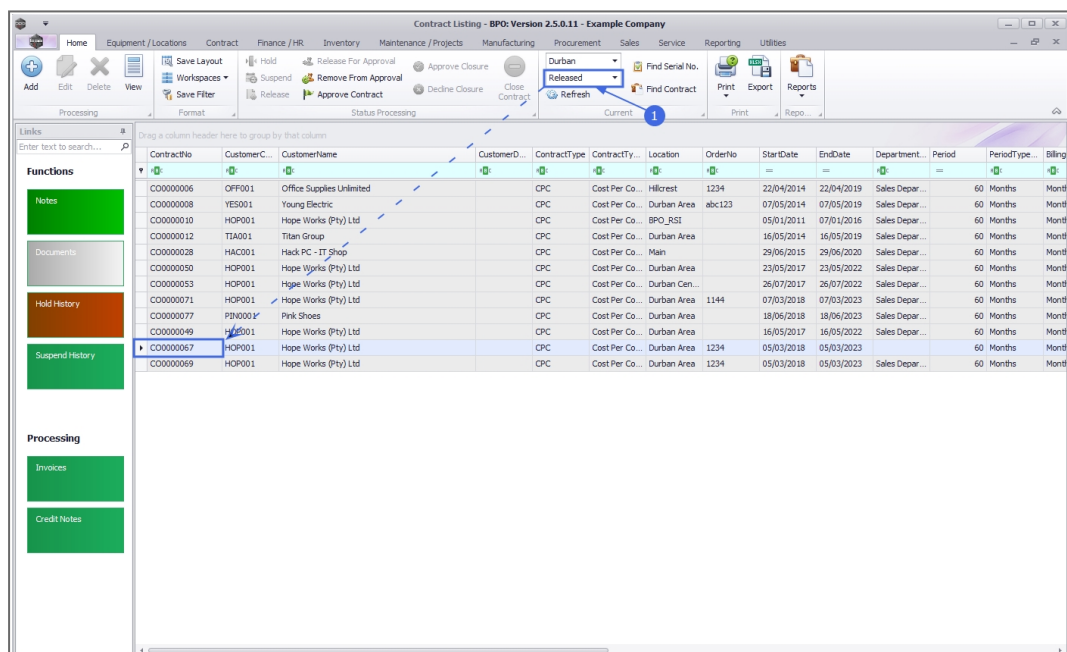
- Select the contract.
- Click on the ***Decline Closure*** button.



- A message box will come up, noting: ***The contract number [contract number], has been release from closure approval.***
- Click on the ***Ok*** button.

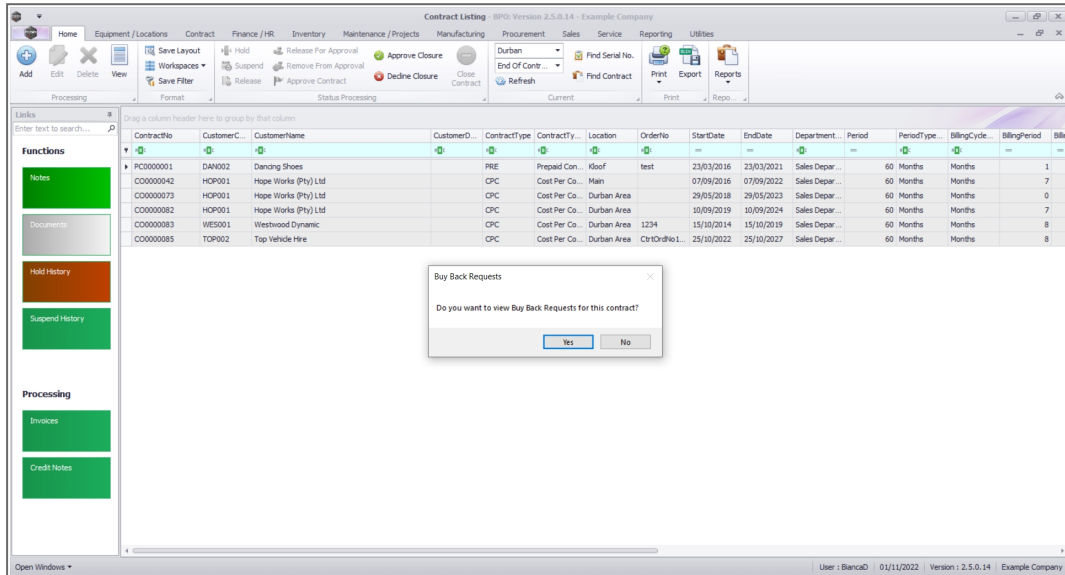


- The contract status will be changed to **Released**. The contract will need to be **Approved** before it is **Active** again.

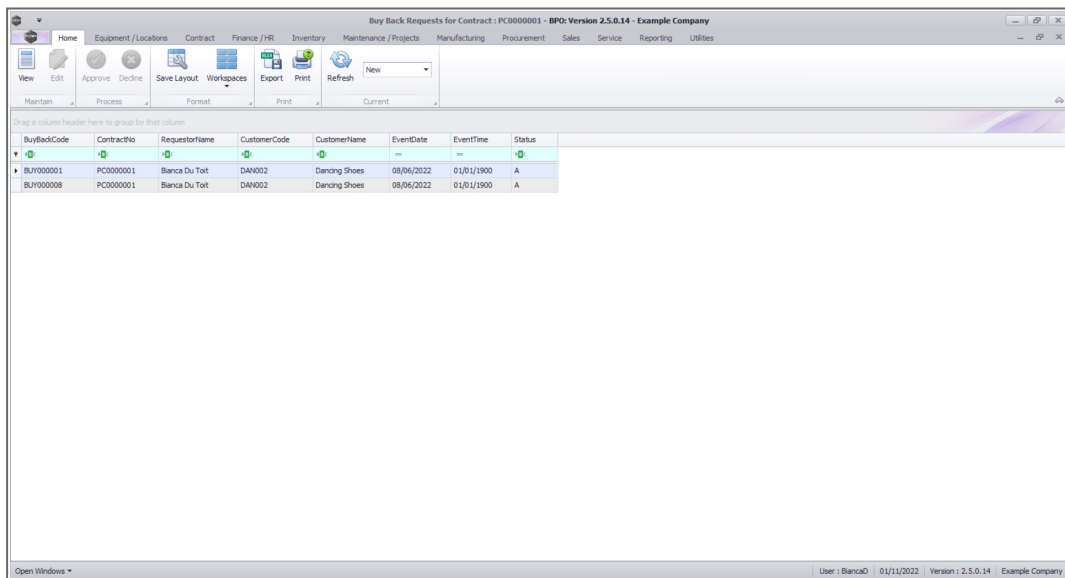


If any Buy Back Requests were created via Contract Expiry that have not yet been approved, you will be asked if you would like to view those requests: ***Do you want to view Buy Back Requests for this contract?***

- Click on the **Yes** button.



- The **Buy Back Request Listing** screen will open displaying the relevant requests for this contract. **Approve** or **Decline** as required.



Related Topics

- [Close Contract](#)
- [Contract Expiry](#)

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