

SERVICE

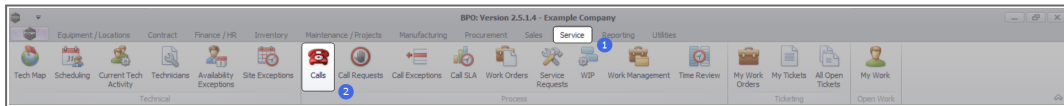
CALLS - FOR CONTRACT

Note that there are changes to the Call Centre screens due to the Call Centre Performance Enhancements rolled out in part of the Extended Call Centre - Version Compatibility¹. The functionality that is available to you may differ depending on the Call Centre mode configured and your user rights. For more information related to this, refer to the [Call Centre Mode](#) notes.

The Items Awaiting Contract for Call screen displays items linked to the selected call 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**)

Ribbon Select *Service* > *Calls*



- The **Call Listing** screen will be displayed.

¹BPO2 v2.5.1.3 or higher

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	02:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Salemtek Driver	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			19-12/202		3
EN0001001	Young Electric	20/11/2022	Unassigned		11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			en123		3
EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Barcode	IGR	New/Def Rental				BPO2 TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SERV	Service				TOP1234OLD	3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	12/06/2022	Unassigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/04/2022	Unassigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/04/2022	Unassigned		05:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	18/04/2022	Unassigned		05:00:00	Test future call - for elapsed time	UPG	Upgrade			20-46765		3
EN0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		05:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		05:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN232415946		3
EN0000982	Young Electric	18/04/2022	Unassigned		05:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	05:30:20	test another call email	ACM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		05:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		05:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000964	Red PC / IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The Calls are listed by **Site** and will display calls for the first Site listed.
- Click on the relevant **Site** for the calls you wish to view.

CallReference	CustomerName	CallDate	CallState	Technician	CallTime	Description	CallType	CallTypeDesc	Error Code	Error Code Desc	SerialNo	ChkLocationSubject	Priority
EN0001003	Young Electric	13/12/2022	Awaiting Acceptance	Ash Hilson	02:09:10	Test account balances	CR	Change Request			107		3
EN0001002	Salemtek Driver	12/12/2022	Awaiting Acceptance	Mary Thompson	06:18:30	Test call for account balances manual.	SR	Select Call Type			19-12/202		3
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EN0000996	Hope Works (Pty) Ltd	24/10/2022	Unassigned		13:11:11	Printer/Barcode	IGR	New/Def Rental				BPO2 TEST 1	3
EN0000992	Top Vehicle Hire	20/10/2022	Awaiting Acceptance	Daniel Belgoven	14:55:17	Loan machine for temporary high volume printing requirement	SERV	Service				TOP1234OLD	3
EN0000991	Asda Java Inc	24/10/2022	Unassigned		05:38:15	Contact Closure - C0000054	SR	Select Call Type					3
EN0000989	Deton / Technologies	13/04/2022	Unassigned		09:00:00	Call for Monday elapse hours check	TEST	Testing			2020-2222		3
EN0000988	Young Electric	12/06/2022	Unassigned		05:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration	en123		3
EN0000987	Young Electric	06/04/2022	Unassigned		05:00:00	Call logged 4 days ago for elapse time checks	UPG	Upgrade			en123		3
EN0000986	Young Electric	07/04/2022	Unassigned		05:00:00	Call logged 5 days ago for elapse time checks	SR	Select Call Type			en123		3
EN0000985	Hope Works (Pty) Ltd	18/04/2022	Unassigned		05:00:00	Test future call - for elapsed time	UPG	Upgrade			20-46765		3
EN0000984	Hope Works (Pty) Ltd	06/04/2022	Unassigned		05:00:00	Test elapsed hours - 2 days prior	TEST	Testing			AT2000000		3
EN0000983	Hope Works (Pty) Ltd	06/04/2022	Unassigned		05:00:00	Test elapsed time 2 - day prior	TEST	Testing			SN232415946		3
EN0000982	Young Electric	18/04/2022	Unassigned		05:00:00	Test elapsed hours 1	TEST	Testing			en123		3
EN0000976	Young Electric	18/11/2019	Awaiting Acceptance	Bianca Du Toit	11:24:28	Test with our message email entered	ACM	Administration			107		3
EN0000974	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	05:30:20	test another call email	ACM	Administration			095010155		3
EN0000972	Hope Works (Pty) Ltd	18/11/2019	Awaiting Acceptance	Bianca Du Toit	15:07:00	Test new call for email description in body	CR	Change Request			095010155		3
EN0000971	Westwood Dynamic	20/11/2019	Unassigned		05:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000970	Westwood Dynamic	22/11/2019	Unassigned		05:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000969	Hope Works (Pty) Ltd	16/11/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000968	Green Tea Supplies	16/11/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
EN0000967	Westwood Dynamic	15/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000966	Westwood Dynamic	08/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000965	Westwood Dynamic	01/11/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000964	Red PC / IT Shop	26/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
EN0000963	Westwood Dynamic	20/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000962	Hope Works (Pty) Ltd	19/10/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30200		2
EN0000961	Hope Works (Pty) Ltd	18/10/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000960	Westwood Dynamic	18/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000959	Westwood Dynamic	11/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000958	Westwood Dynamic	04/10/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000957	Westwood Dynamic	27/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000956	Westwood Dynamic	20/09/2019	Unassigned		08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - H/West	2
EN0000955	Hope Works (Pty) Ltd	18/09/2019	Unassigned		08:00:00	Tier - Commercial Tier Test	INAT	Installation				Forest Hills Centre	2
EN0000954	Green Tea Supplies	17/09/2019	Unassigned		08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

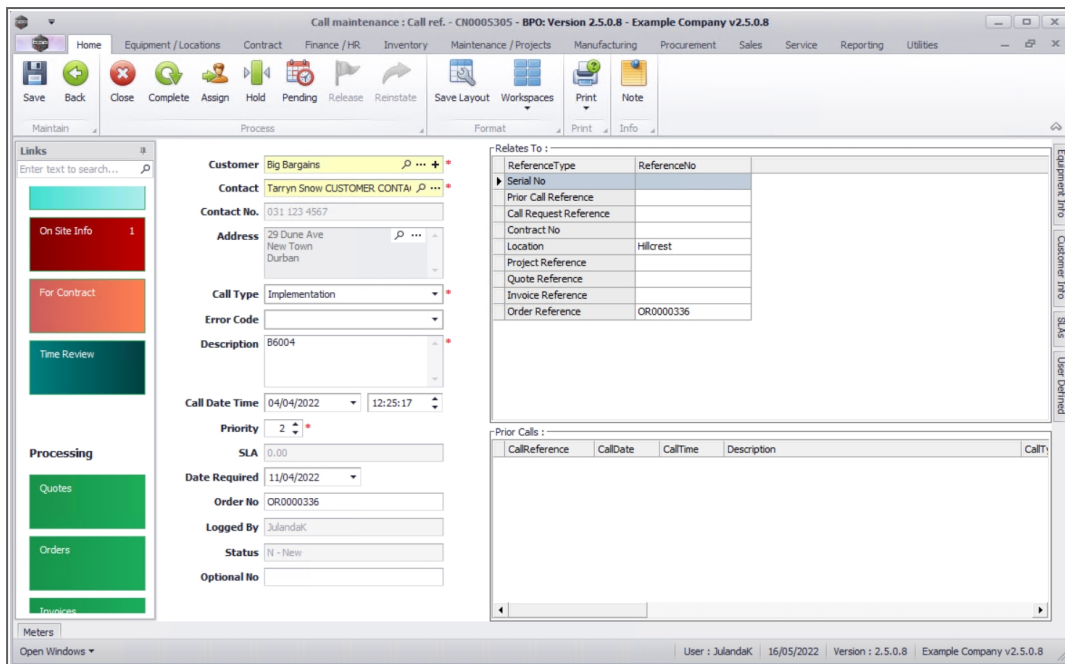
- Select the **Call** you wish to work with.

CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	12/12/2022	20:29:10	Test account balance	CR	Change Request			107		3
BN CH001002	Silverdale Drive	12/12/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			107		3
BN CH001001	Young Electric	20/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000992	Top Vehicle Hire	25/10/2022	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP123456		3
BN CH000991	Apple Juice Inc	24/03/2022	05:36:15	Contact Closure - C0000055	DR	Select Call Type					2
BN CH000989	Derton / Technologies	13/04/2022	09:00:00	Call for Monday escape hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	12/04/2022	06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/04/2022	06:00:00	Call logged 4 days ago for escape time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/04/2022	06:00:00	Call logged 5 days ago for escape time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/04/2022	05:09:13	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Test elapsed time 2 - day prior	TEST	Testing			52021413546		3
BN CH000982	Young Electric	18/04/2022	06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000978	Hope Works (Pty) Ltd	18/11/2019	06:30:28	Test another call email	ADM	Administration			0950191015		3
BN CH000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			0950191015		3
BN CH000971	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000970	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000963	Westwood Dynamic	25/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- Click on the **Edit** button.

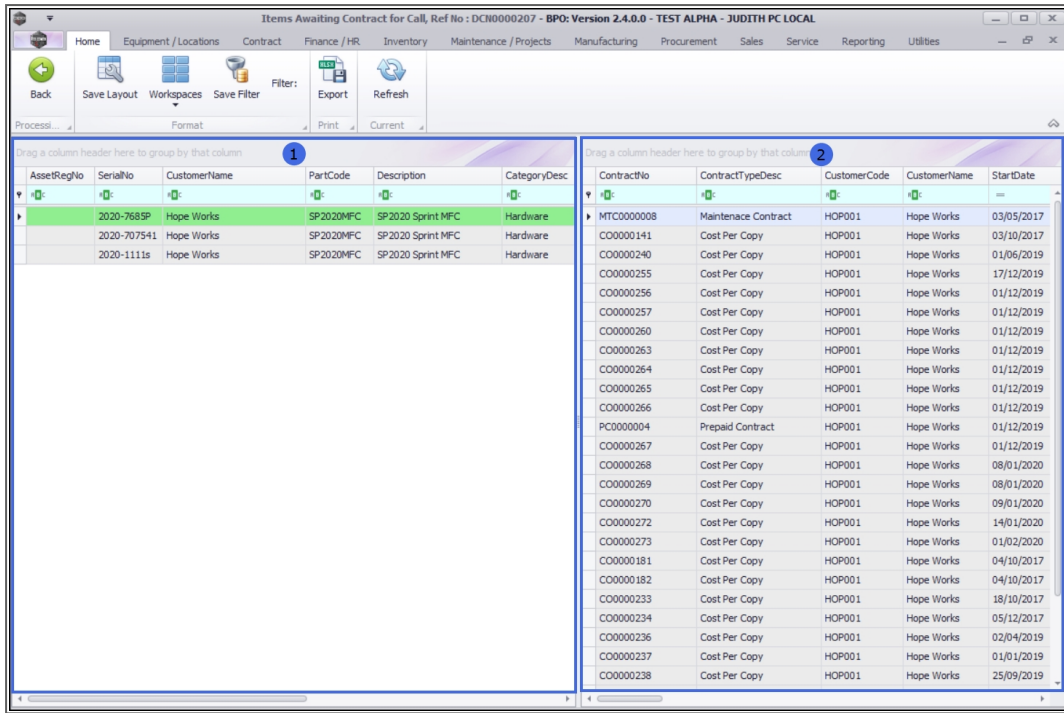
CallReference	CustomerName	CallDate	CallTime	Description	CallType	CallDesc	ErrorCode	ErrorCodeDesc	SerialNo	ChkLocationSubject	Priority
BN CH001003	Young Electric	12/12/2022	20:29:10	Test account balance	CR	Change Request			107		3
BN CH001002	Silverdale Drive	12/12/2022	06:38:20	Test call for account balance manual	DR	Select Call Type			107		3
BN CH001001	Young Electric	20/11/2022	11:29:19	Order the same part twice receive with different batch num.	CR	Change Request			an123		3
BN CH000992	Top Vehicle Hire	25/10/2022	14:58:17	Loan machine for temporary high volume printing requirement	SRV	Service			TOP123456		3
BN CH000991	Apple Juice Inc	24/03/2022	05:36:15	Contact Closure - C0000055	DR	Select Call Type					2
BN CH000989	Derton / Technologies	13/04/2022	09:00:00	Call for Monday escape hours check	TEST	Testing			2020-2222		3
BN CH000988	Young Electric	12/04/2022	06:00:00	Call logged 5 days ago for time elapsed checks	CR	Change Request	CONF	Configuration			3
BN CH000987	Young Electric	06/04/2022	06:00:00	Call logged 4 days ago for escape time checks	LPG	Upgrade			an123		3
BN CH000986	Young Electric	07/04/2022	06:00:00	Call logged 5 days ago for escape time checks	DR	Select Call Type			an123		3
BN CH000985	Hope Works (Pty) Ltd	18/04/2022	05:09:13	Test future call - for elapsed time	LPG	Upgrade			20-86765		3
BN CH000984	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Test elapsed hours - 2 day prior	TEST	Testing			47200000		3
BN CH000983	Hope Works (Pty) Ltd	06/04/2022	06:00:00	Test elapsed time 2 - day prior	TEST	Testing			52021413546		3
BN CH000982	Young Electric	18/04/2022	06:00:00	Test elapsed hours 1	TEST	Testing			an123		3
BN CH000981	Young Electric	18/11/2019	11:24:29	Test with site manager email entered	ADM	Administration			107		3
BN CH000978	Hope Works (Pty) Ltd	18/11/2019	06:30:28	Test another call email	ADM	Administration			0950191015		3
BN CH000972	Hope Works (Pty) Ltd	18/11/2019	15:57:00	Test new call for email description in body	CR	Change Request			0950191015		3
BN CH000971	Westwood Dynamic	29/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000970	Westwood Dynamic	22/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000969	Hope Works (Pty) Ltd	16/11/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000968	Green Tea Supplies	16/11/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2
BN CH000967	Westwood Dynamic	15/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000966	Westwood Dynamic	08/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000965	Westwood Dynamic	02/11/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000964	HOCK PC - IT Shop	26/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			147807		2
BN CH000963	Westwood Dynamic	25/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000962	Hope Works (Pty) Ltd	19/10/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			18-30300		2
BN CH000961	Hope Works (Pty) Ltd	18/10/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000960	Westwood Dynamic	18/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000959	Westwood Dynamic	11/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000958	Westwood Dynamic	04/10/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000957	Westwood Dynamic	27/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000956	Westwood Dynamic	20/09/2019	08:00:00	Subst/Maint - Bathroom Bin Maintenance	SM	Scheduled Maintenance				Checkers Centre - Hilo-test	2
BN CH000955	Hope Works (Pty) Ltd	18/09/2019	08:00:00	Tier - Commercial Tier Test	INST	Installation				Forest Hills Centre	2
BN CH000954	Green Tea Supplies	17/09/2019	08:00:00	2MS - 2 month service	SM	Scheduled Maintenance			NEW1234		2

- The **Call Maintenance** screen will be displayed.
- Click on the **For Contract** tile.



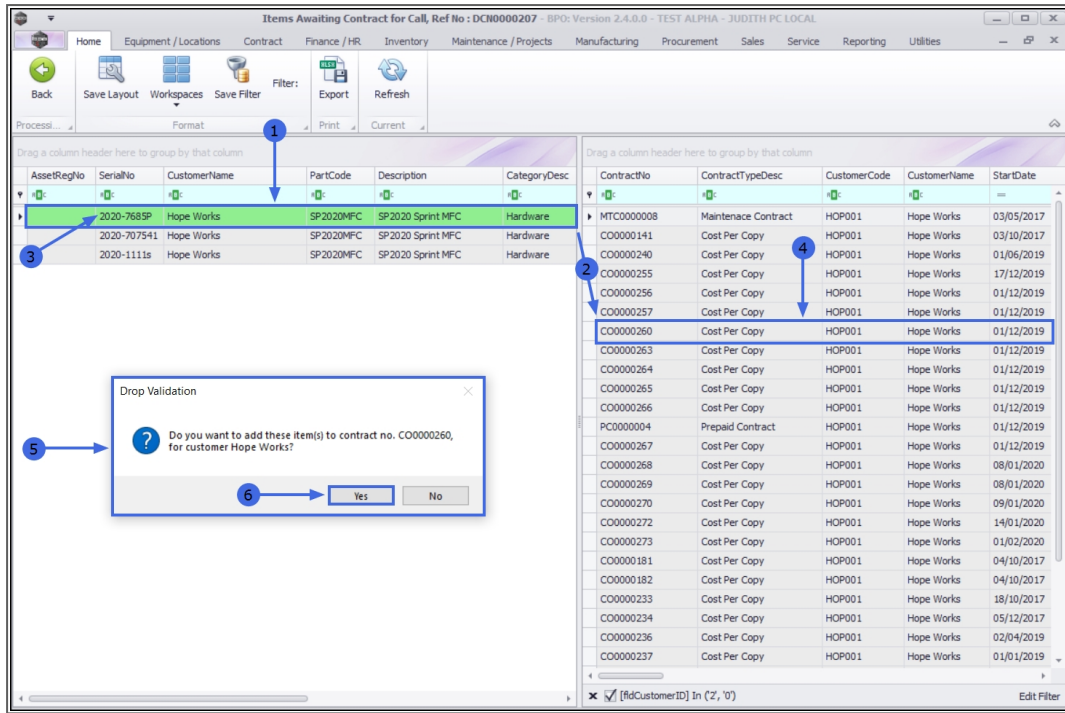
FOR CONTRACT

- The *Items Awaiting Contract for Call []* screen will be displayed.
- The screen is divided into **2** data grids.
 - **Data grid 1:** displays all the items linked to the selected call *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 Rental** process has to be completed first.
 - **Data grid 2:** displays all the existing contracts for the *customer* linked to the call.
 - **Note:** Deleted or *closed* contracts will not be displayed in this data grid.



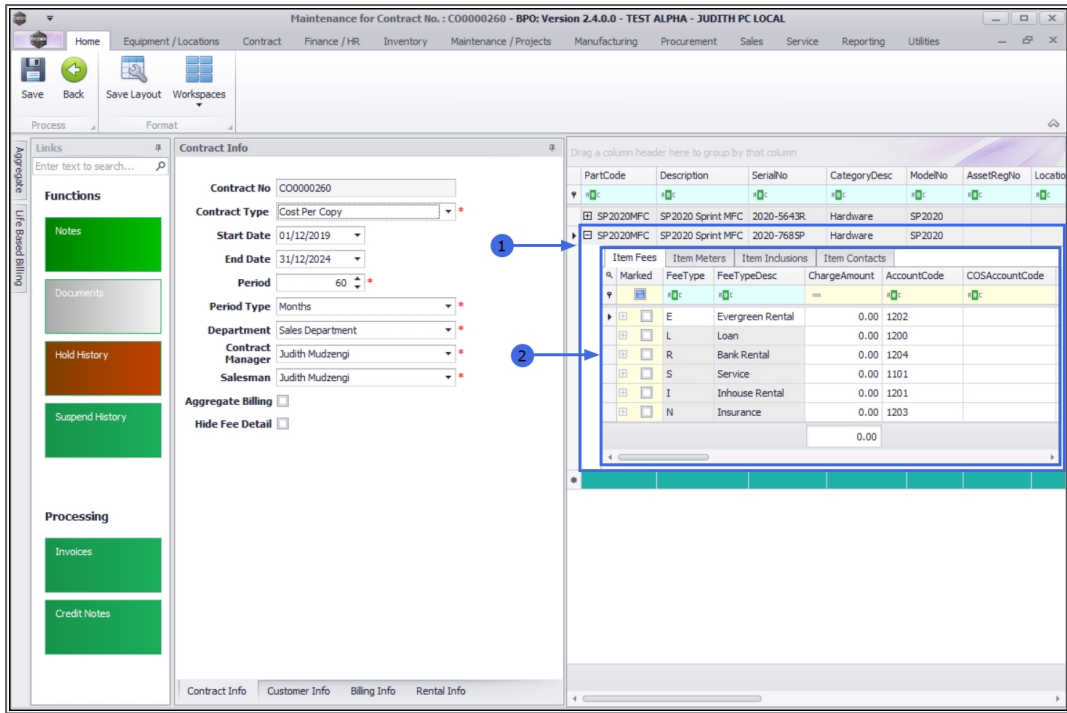
LINK A SINGLE ITEM TO AN EXISTING CONTRACT

- **Click** and **hold** on the contract item in data grid **1**, that you wish to add to an existing contract.
- **Drag** the contract item to an existing contract displayed in data grid **2**.
- In this image, serial no. **2020-7685P** has been selected, and will be dragged and dropped onto
- Contract no. **CO0000260**.
- As it is 'dropped', a **Drop Validation** message box will pop up asking;
 - **Do you want to add these items(s) to contract no. [], for customer []?**
- Click on **Yes**.



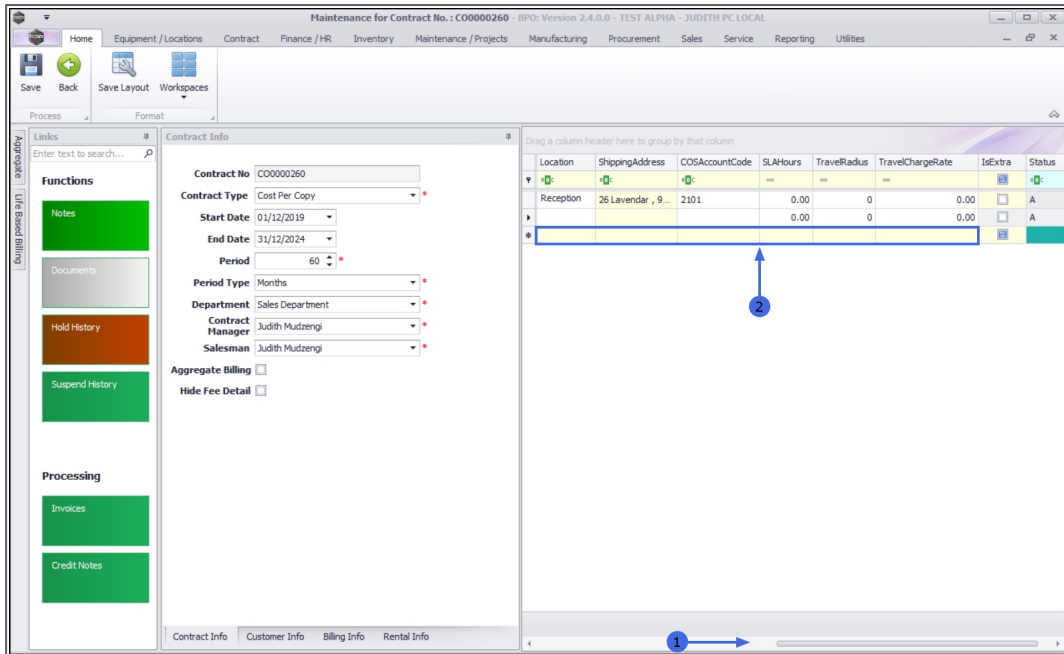
The **Maintenance for Contract No.: []** screen will be displayed.

- The contract item you have added will be listed last in the **Parts** data grid.
- 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**

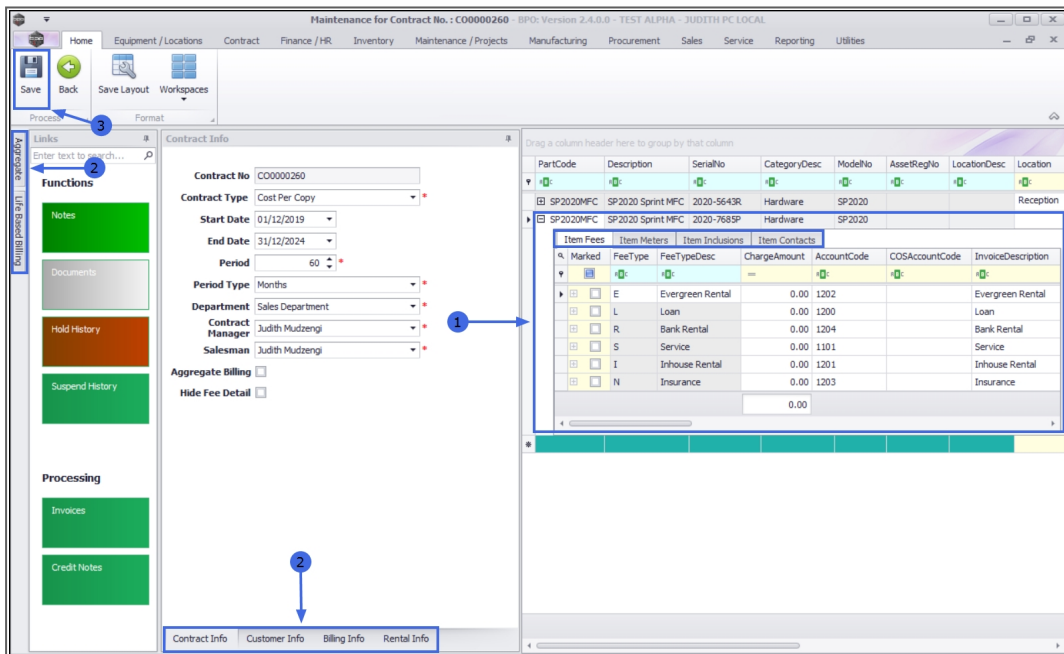


In this screen,

- Scroll right to view all the contract item information.
- 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**



- You can input relevant data for the **Part Item frames**.
- Leave the **Contract Info Panel, Customer Info Panel and Billing Info Panel** as is.
- Click on **Save**.



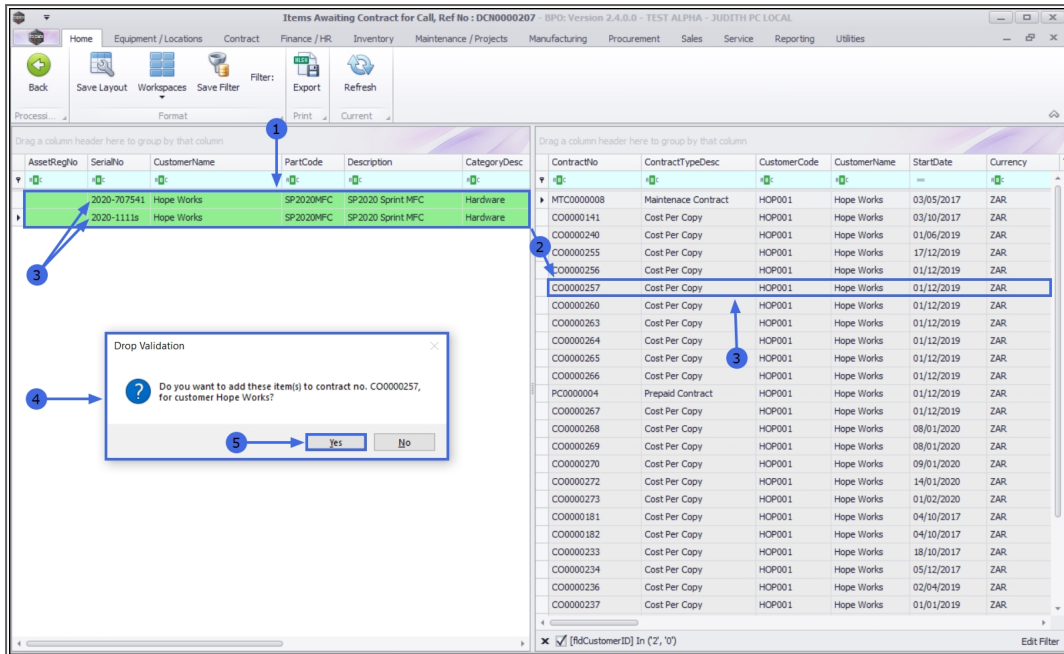
- The item will be linked to the **existing** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract for Call** listing screen.

LINK MULTIPLE ITEMS TO AN EXISTING CONTRACT

- In the **Items Awaiting Contract for Call** screen, select the multiple items in data grid **1** that you wish to be linked to an existing contract.

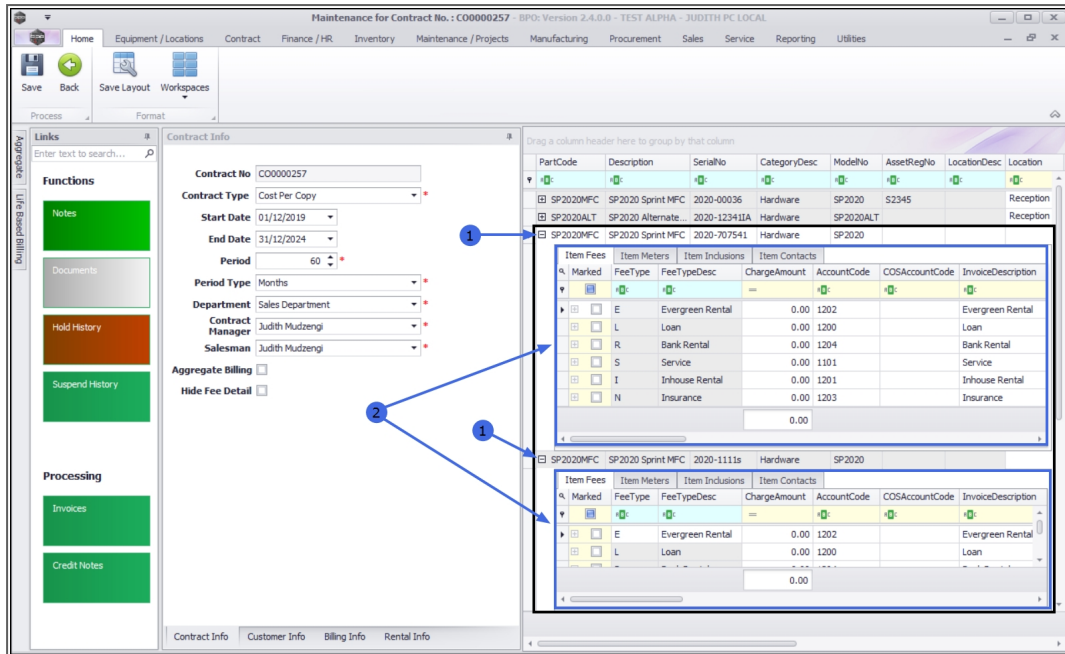
In order to be able to select more than one item on this data grid, press and hold **Ctrl** on the keyboard as you use your **mouse** to click on each item.

- **Drag** the items to an existing contract in data grid 2.
- In this image, serial no **2020-707541** and **2020-1111s** have been selected, dragged and dropped on to contract no **CO0000257**.
- A **Drop Validation** message box will pop up asking;
 - **Do you want to add these items(s) to contract no. [] for customer []?**
- Click on **Yes**.



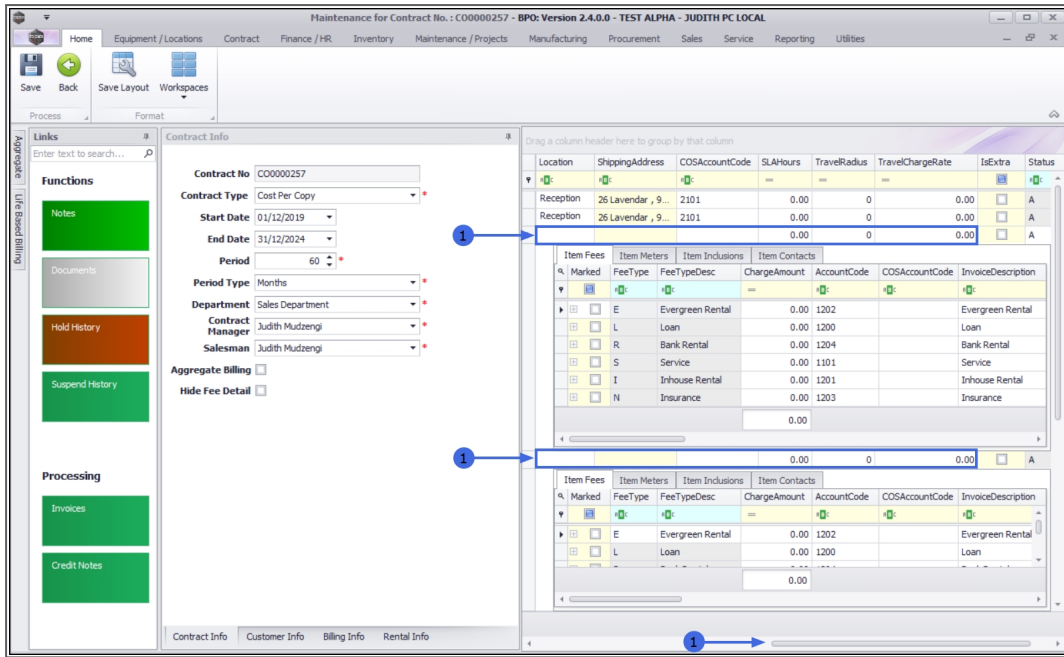
The **Maintenance for Contract No []** screen will be displayed.

- The items you are adding to the contract will be listed last in the **Parts** data grid.
- 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**

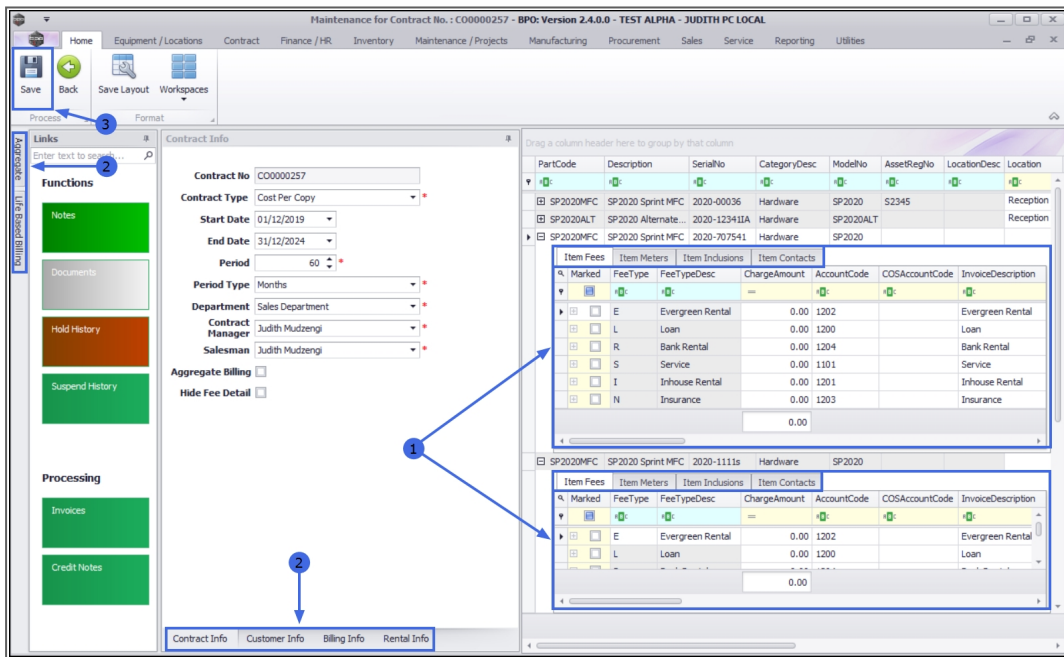


In this screen,

- Scroll right to view all the contract item information.
- 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**



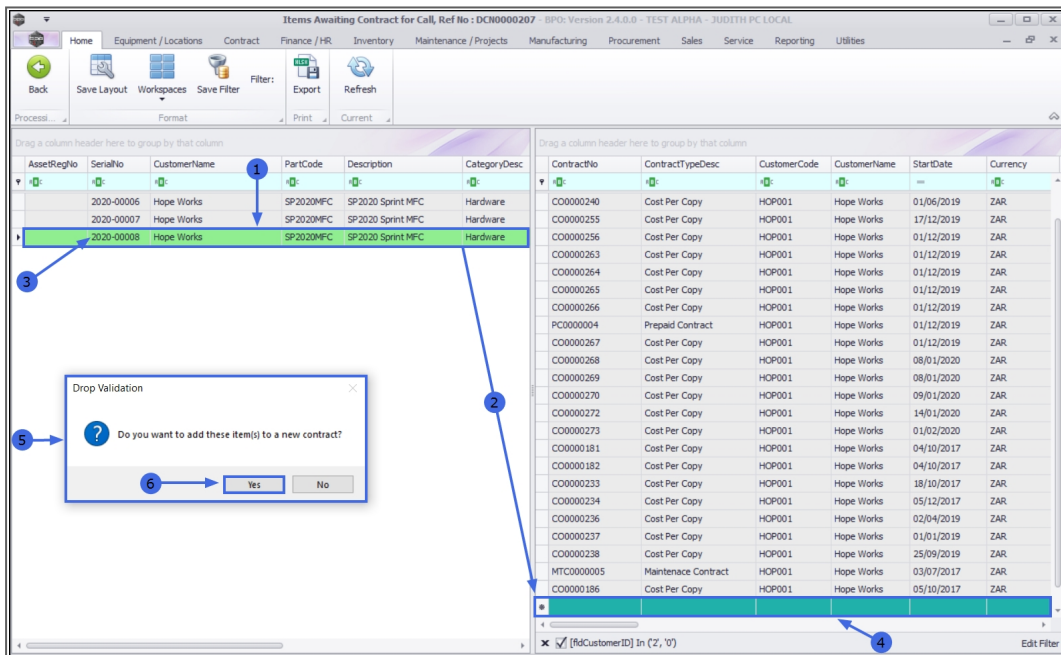
- You can input relevant data for the **Parts (Equipment Item) frame**.
- Leave the **Contract Info Panel, Customer Info Panel and Billing Info Panel** as is.
- Click on **Save**.



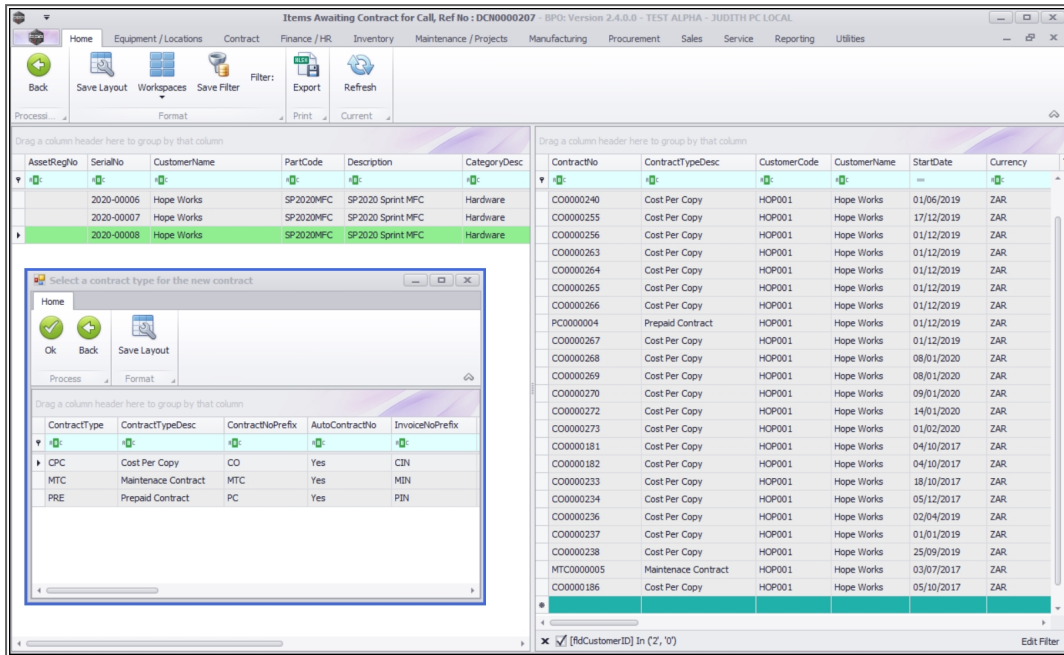
- The items will be linked to the **existing** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

LINK A SINGLE ITEM TO A NEW CONTRACT

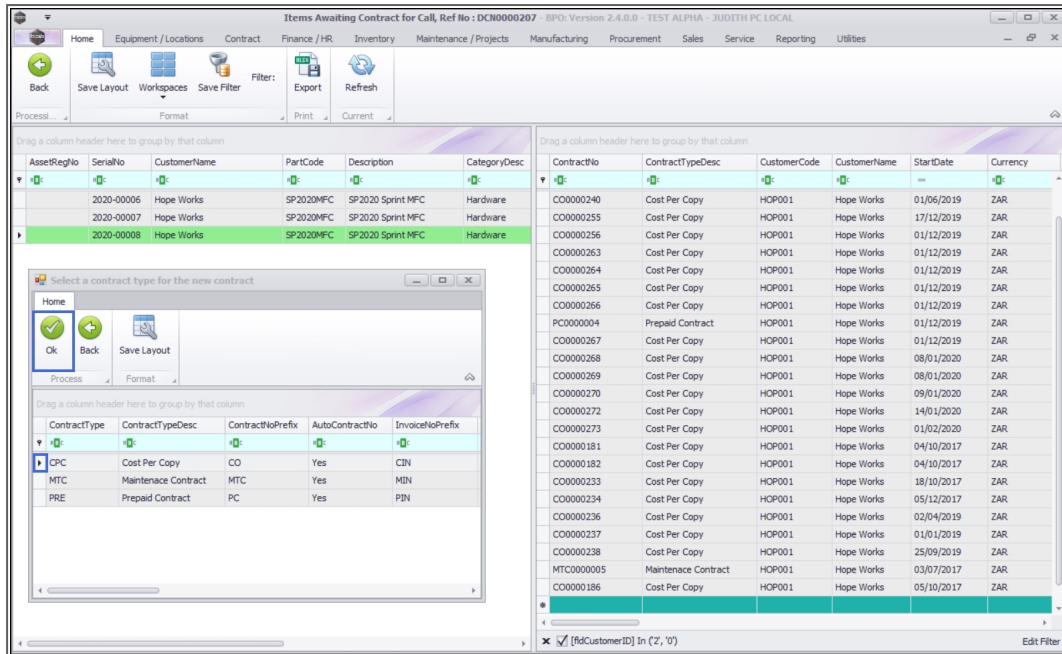
- In the **Items Awaiting Contract for Call** screen, click on the single item that you wish to add to a **new** contract.
- Drag the item to the last, blank row in data grid 2. This row contains an **asterisk** in the row selector column.
- In this example, serial no **2020-00008** has been selected, dragged and dropped to
- the final **blank row** in data grid 2.
- A **Drop Validation** message box will pop up asking;
 - **Do you want to add these item(s) to a new contract?**
- Click on **Yes**.



- The **Select a contract type for the new contract** screen will pop up.

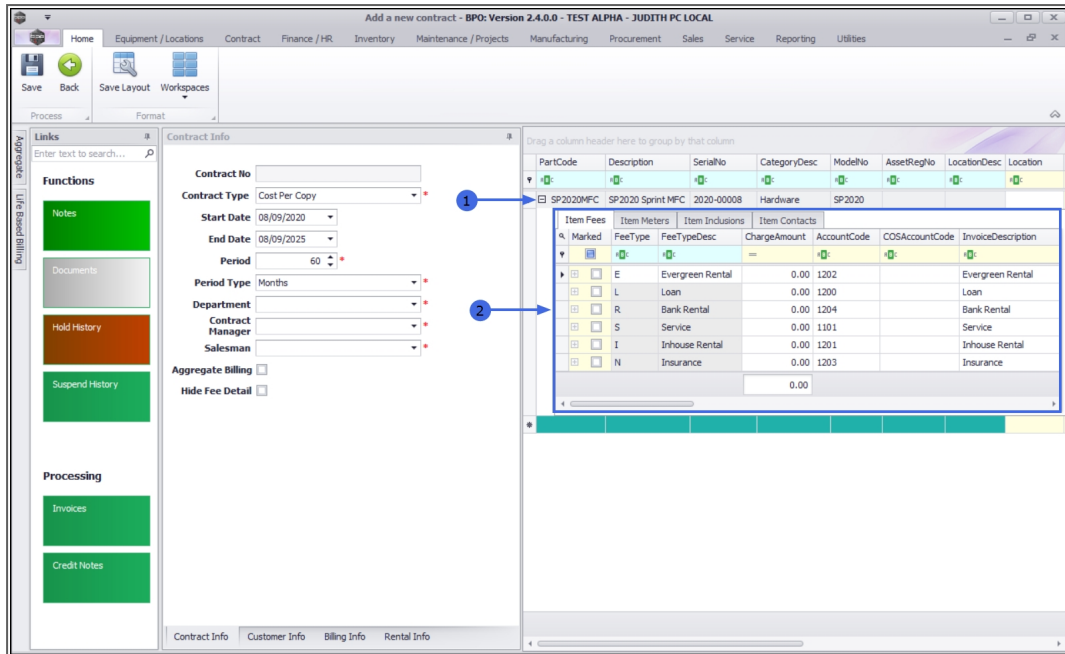


- **Click anywhere** in the **row** of the **contract type** you wish to add.
- Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected.



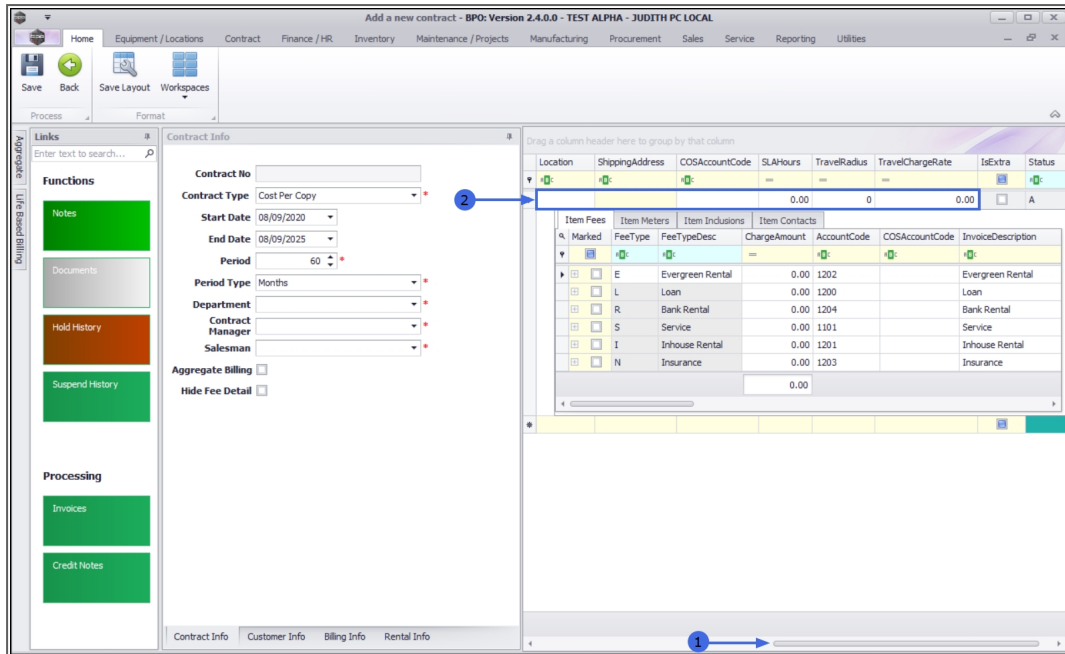
The **Add a new contract** screen will be displayed.

- The item you are adding to the new **contract** will be listed in the **Parts** data grid.
- 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**

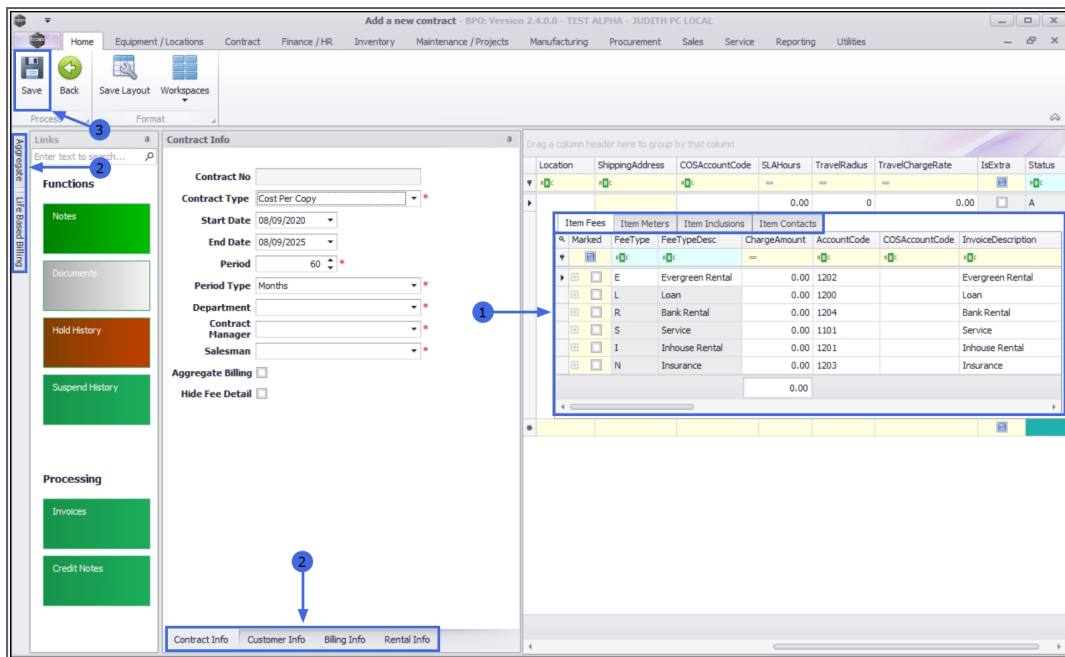


In this screen,

- Scroll right to view all the contract item information.
- 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**



- You can input relevant data for the **Part Item frame**.
- Add the relevant contract details to the; **Contract Info Panel, Customer Info Panel, Billing Info Panel**, (Rental, **Aggregate** and **Life Based Billing**, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- Click on **Save**.

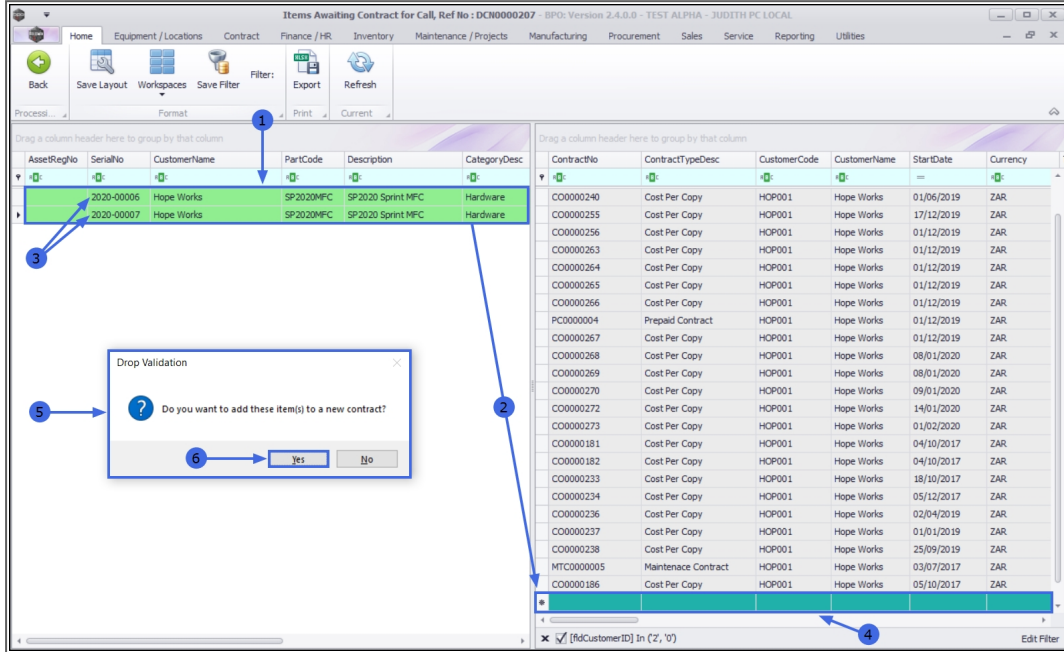


- The item will be linked to the **new** contract and the contract details will be **saved**.
- You will return to the **Items Awaiting Contract** listing screen.

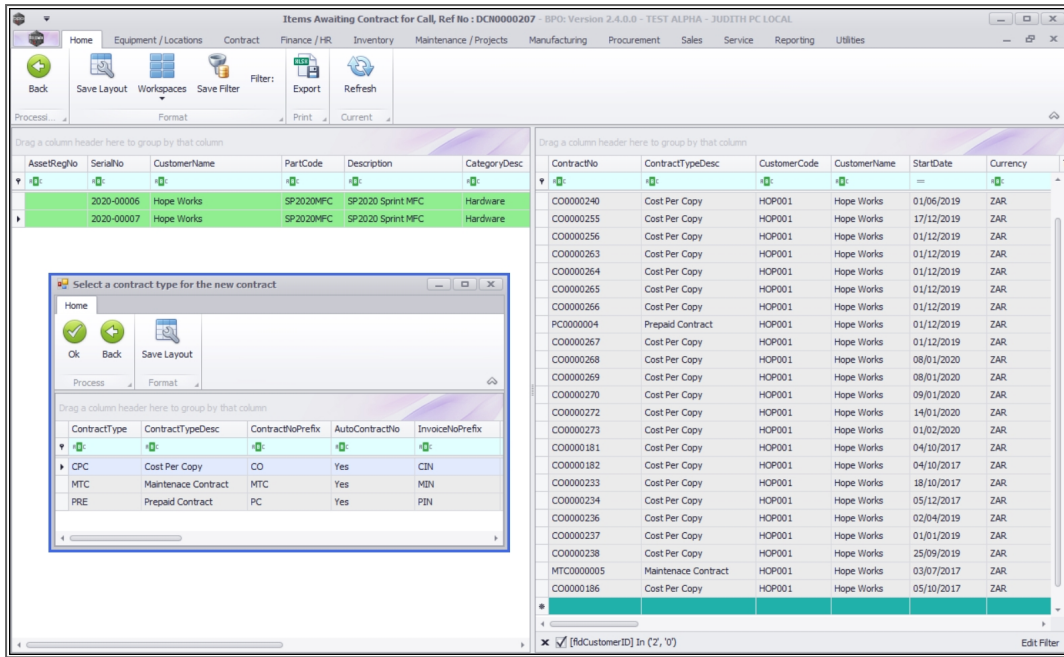
LINK MULTIPLE ITEMS TO A NEW CONTRACT

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. **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 **2020-00006** and **2020-00007** have been selected, dragged and dropped on to
4. the final **blank row** in data grid **2**.

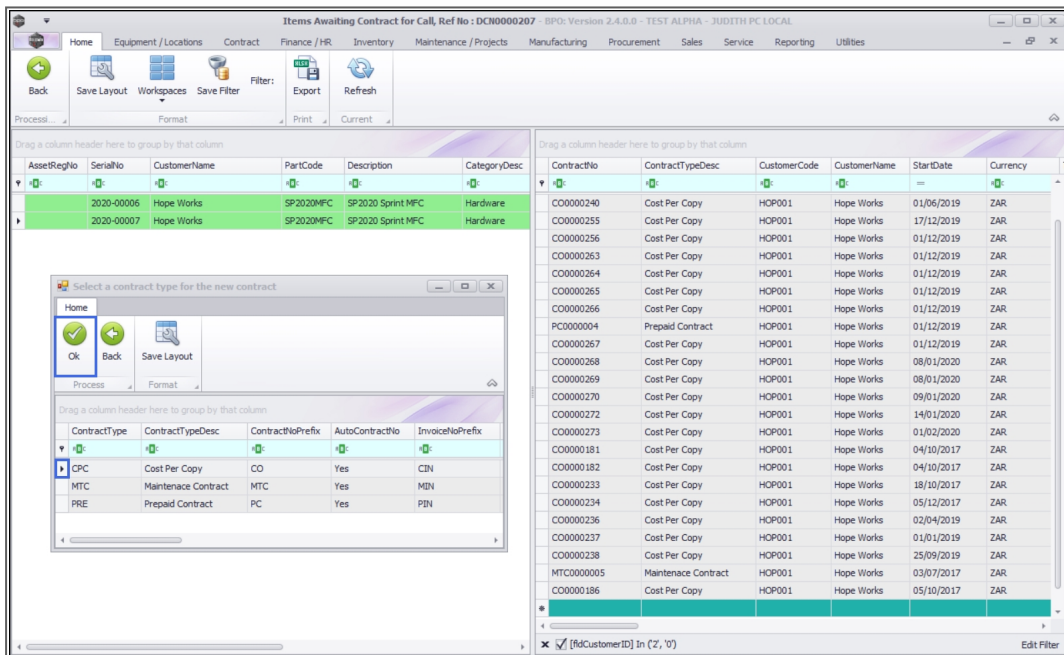
5. A **Drop Validation** message box will pop up asking;
 - **Do you want to add these items(s) to a new contract?**
6. Click on **Yes**.



- The **Select a contract type for the new contract** screen will pop up.

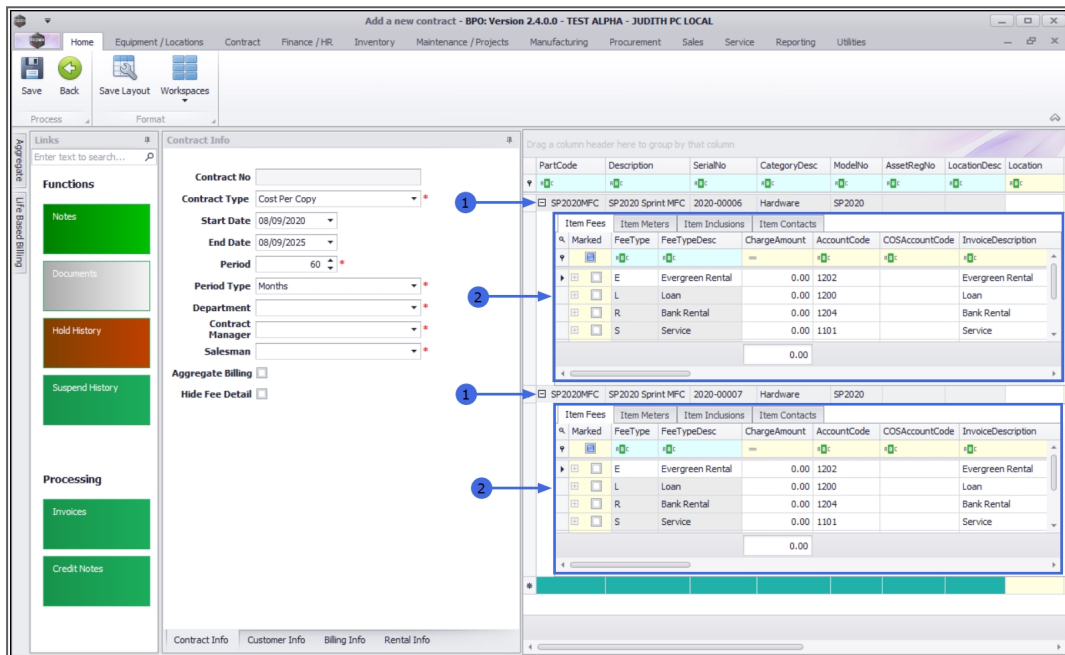


- **Click anywhere** in the **row** of the **contract type** you wish to add.
- Click on **OK**.
 - In this image, **CPC** - Cost Per Copy has been selected.



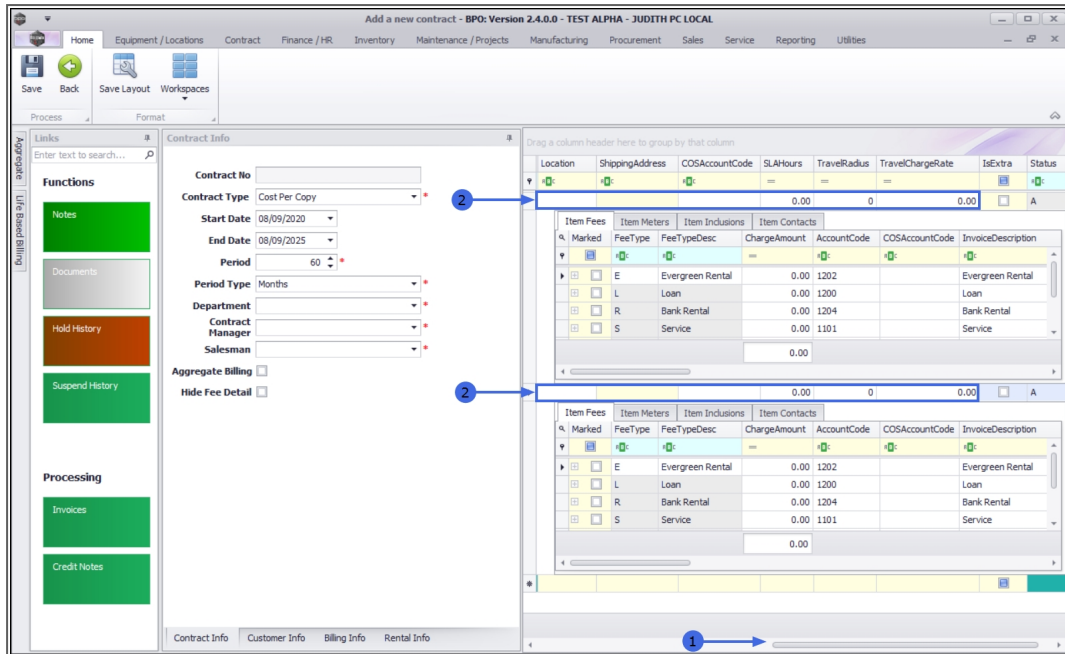
The **Add a new contract** screen will be displayed.

- The items that you are adding to the **new** contract will be listed in the **Parts** data grid.
- 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**

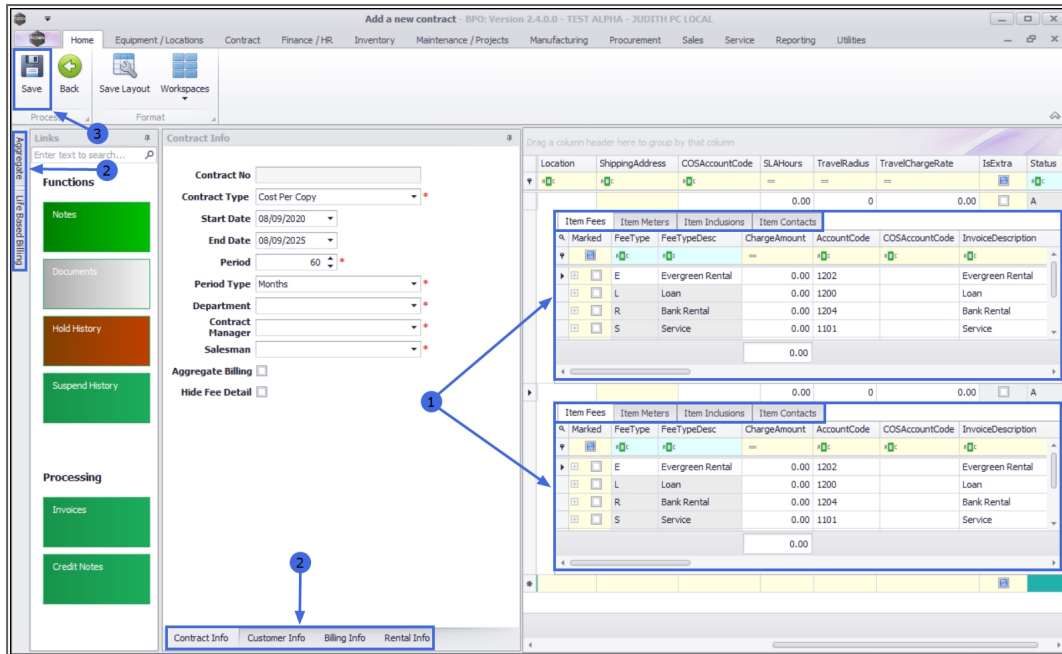


In this screen,

- Scroll right to view all the contract items information.
- 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**



- You can input relevant data for the **Parts Item frames**.
- Add the **new** contract details to the; **Contract Info Panel**, **Customer Info Panel**, **Billing Info Panel** (Rental, **Aggregate** and **Life Based Billing**, if applicable) panels. Some of the fields will be auto-populated but you can change them.
- 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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