CONTRACT

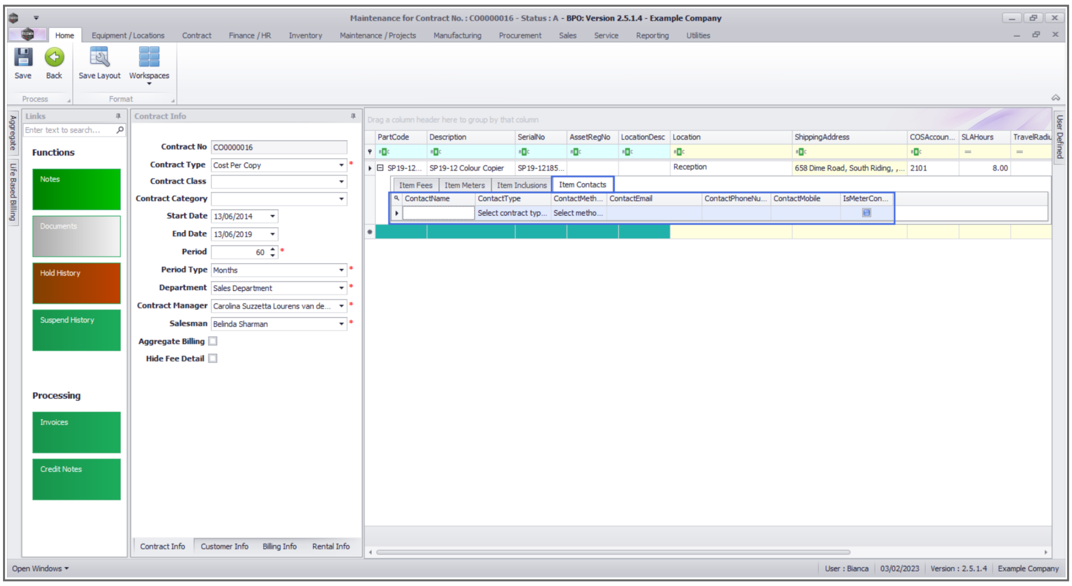
ADD CONTRACT ITEM CONTACTS

You will be following the process below to add each item to be linked to this contract.

This person will be the contact when enquiring about the item and is especially important for items with meter charges.

ITEM CONTACTS

- Ensure you have the contract item selected and then click on the ***Item Contacts*** tab.
- The ***Item Contacts*** frame will be ***expanded***.



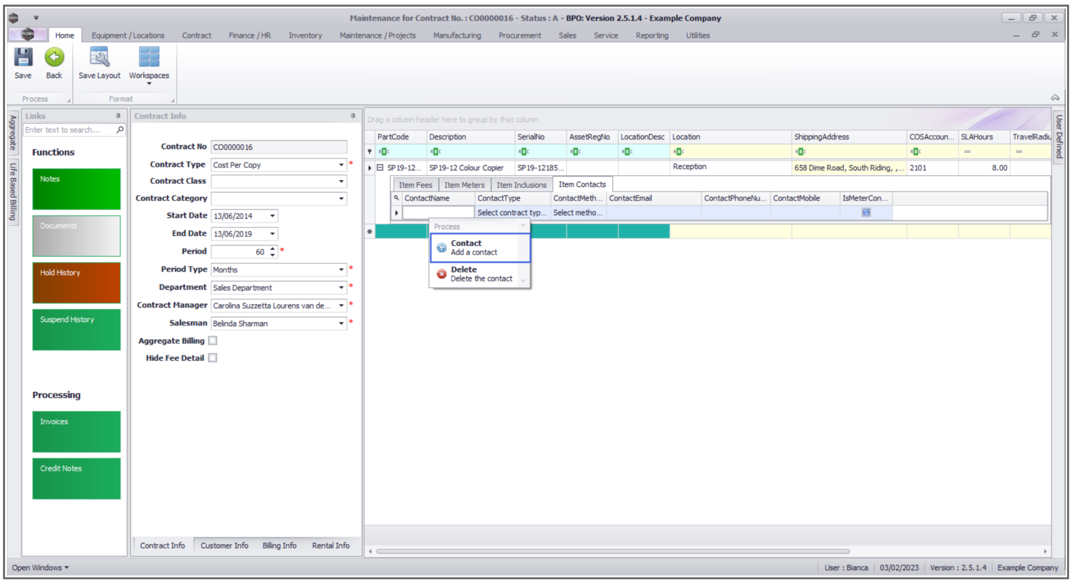
You can add up to 3 types of contacts, depending on your requirements:

- ***Manager Contact:*** the client contact who manages the contract or relevant contract item

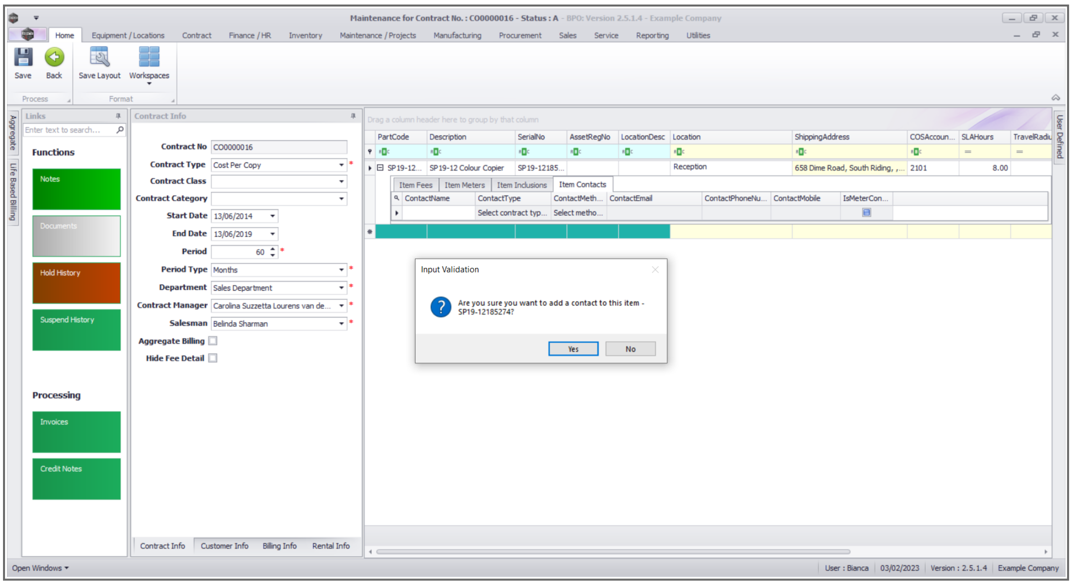
- ***Meter Clicks Contact:*** the client contact who will provide meter readings.
- ***User Contact:*** the client contact who can be called with regards to user queries.

ADD A CONTACT

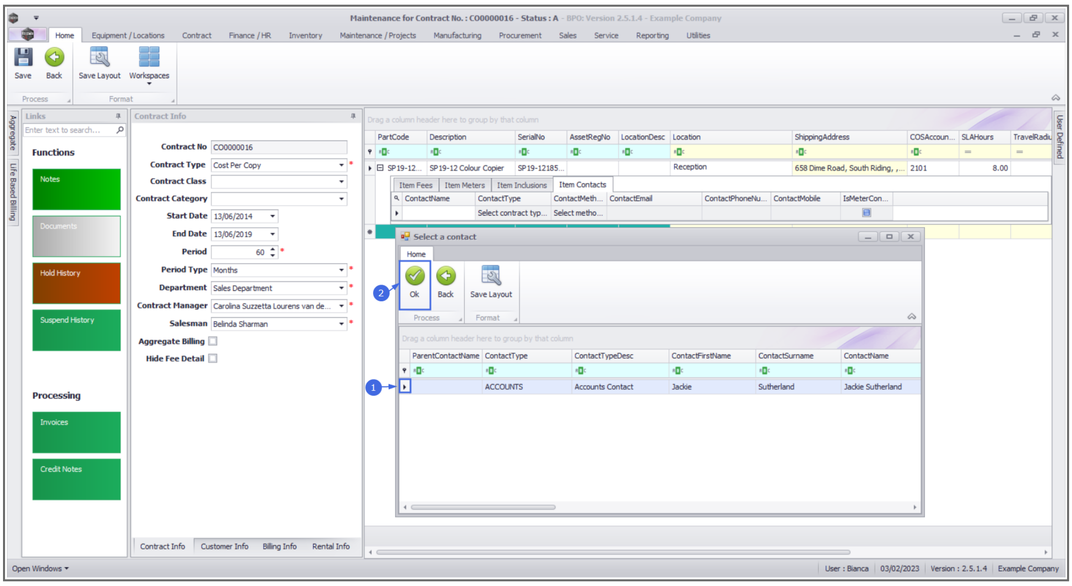
- ***Right click*** anywhere in the first ***row*** of the ***Item Contacts*** frame.
- A ***Process*** menu will pop up.
- Click on ***Contact*** - Add a contact.



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

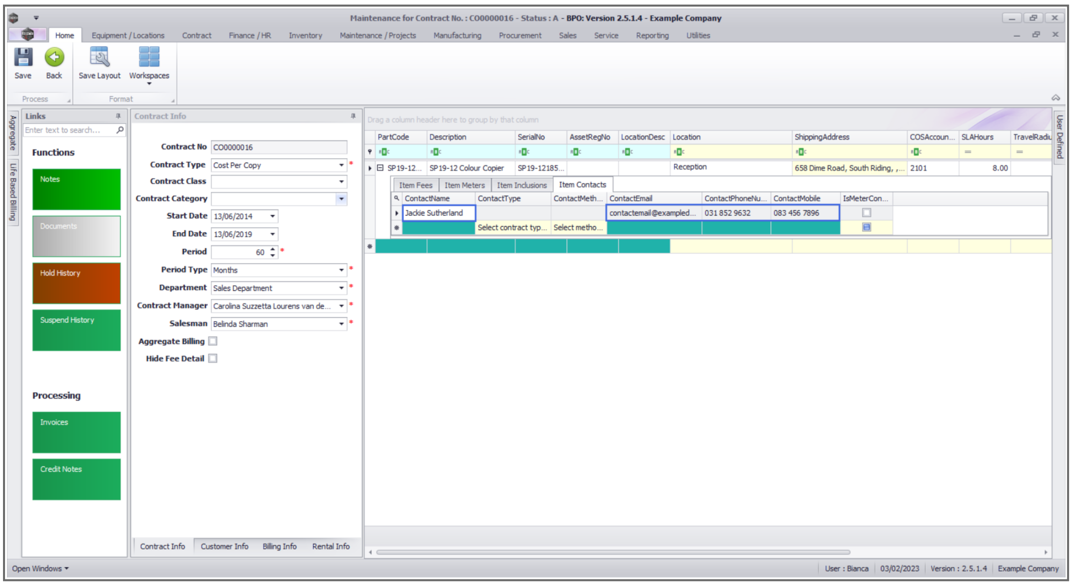


- A **Select a contact** pop up screen will appear.
- Click on the ***row selector*** in front of the ***contact*** you wish to ***add***.
- Click on ***Ok***.

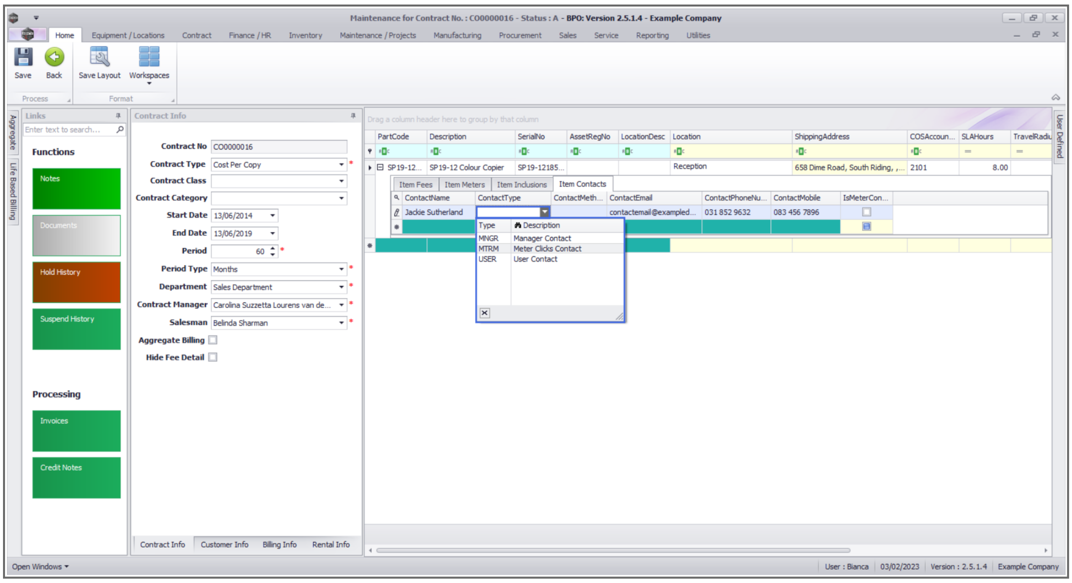


- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address already set up on the selected contact.

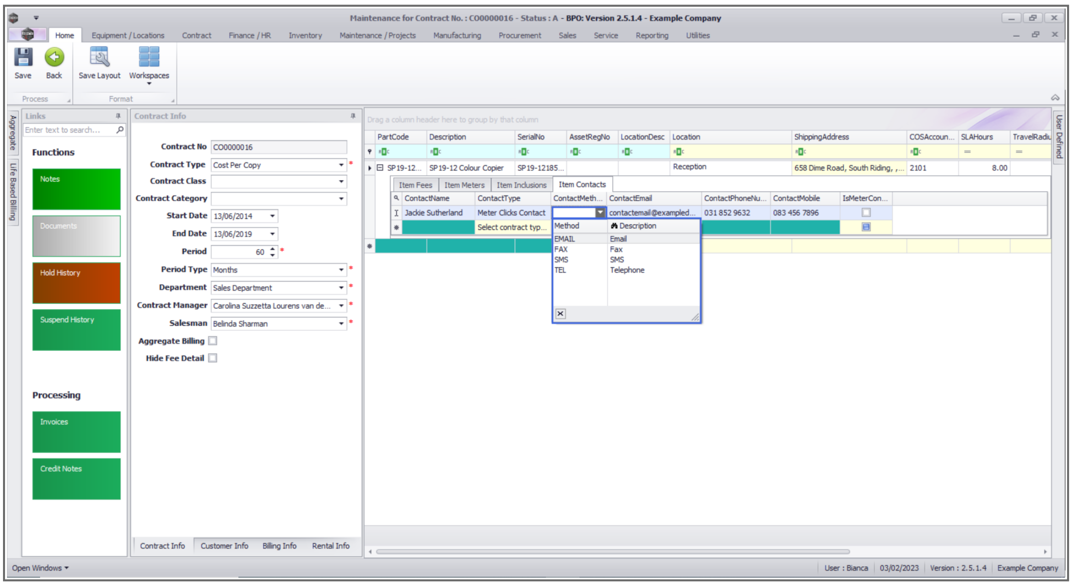
- **Contact Phone Number:** This will auto populate with the phone number already set up on the selected contact.
- **Contact Mobile:** This will auto populate with the mobile number already set up on the selected contact.



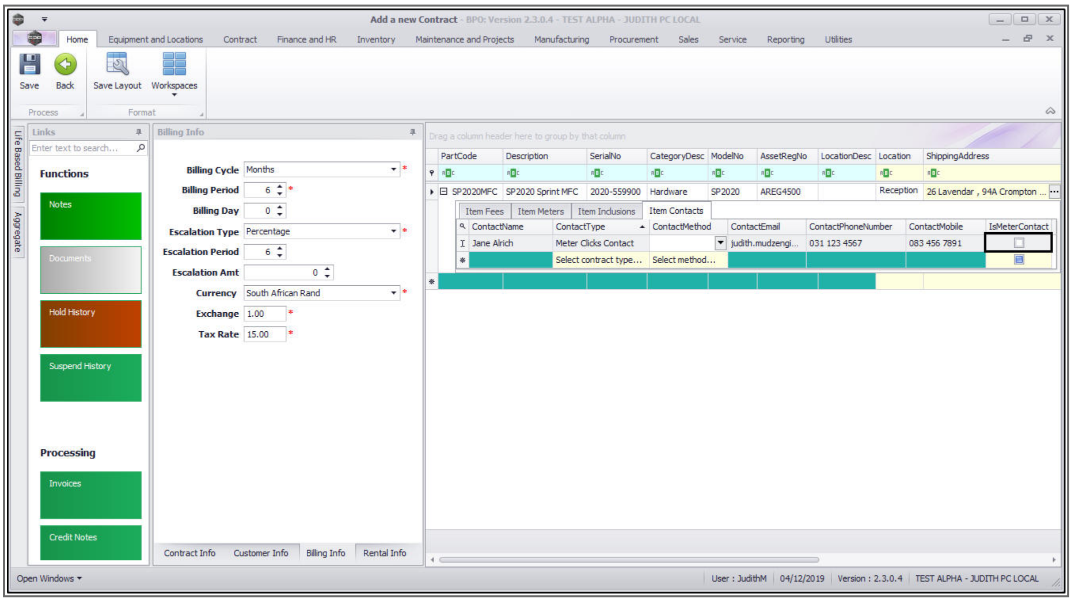
- Click in the ***Contact Type*** text box to reveal a ***drop-down arrow***.
- Click on this arrow to display a ***Contact Type*** drop-down ***menu***.
- Click on the ***contact type*** you wish to assign to this Item.



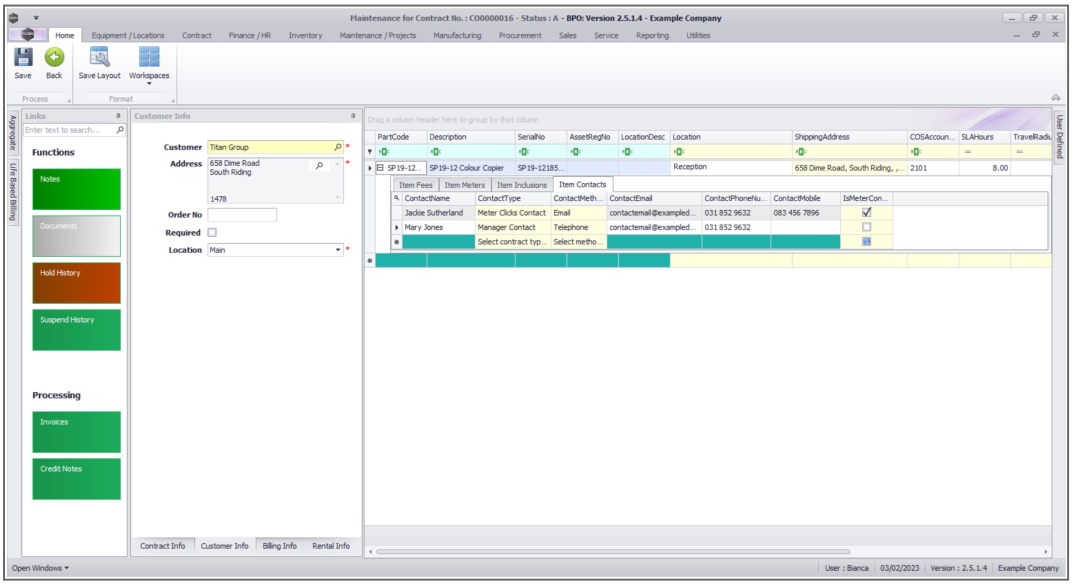
- Click in the ***Contact Method*** text box to reveal a ***drop-down arrow***.
- Click on this arrow to display a ***Contact Method*** drop-down ***menu***.
- Click on the ***preferred contact method*** you wish to use.
  - In this image ***Email*** has been selected.



- **Is Meter Contact:** Select this check box for the main meter contact - this is important where meter charges have been linked to the contract item, as this contact will display in the Meter Capture screens (Unprocessed Meters and Meter Usage) and will be used when sending Meter Reading Email Requests.

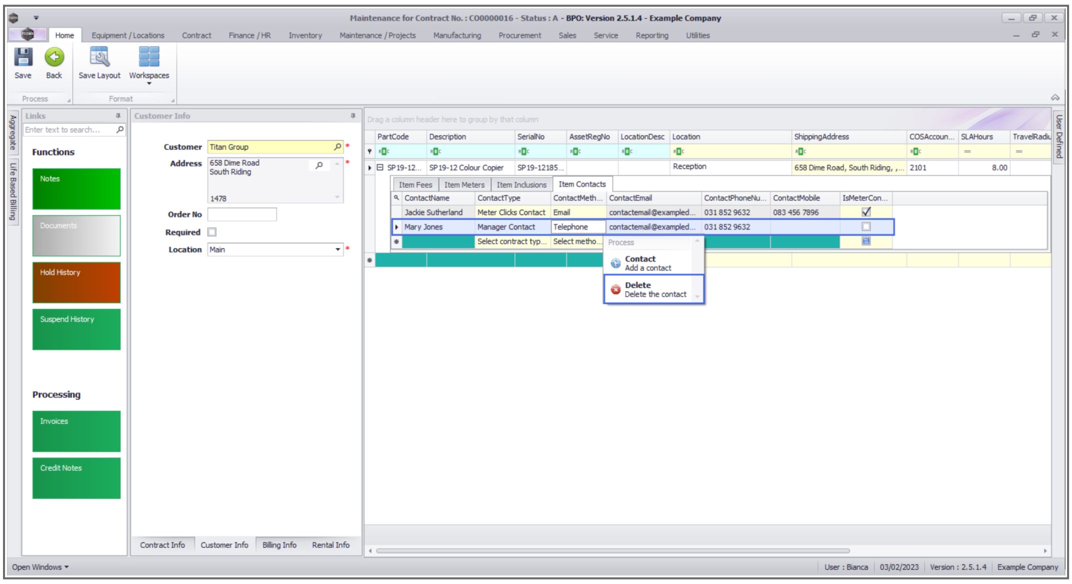


- You can add further contacts to this frame by ***right clicking*** anywhere in a ***row*** of the ***Item Contacts*** frame and following the same process as above.
  - In this image a ***second contact*** has been added.

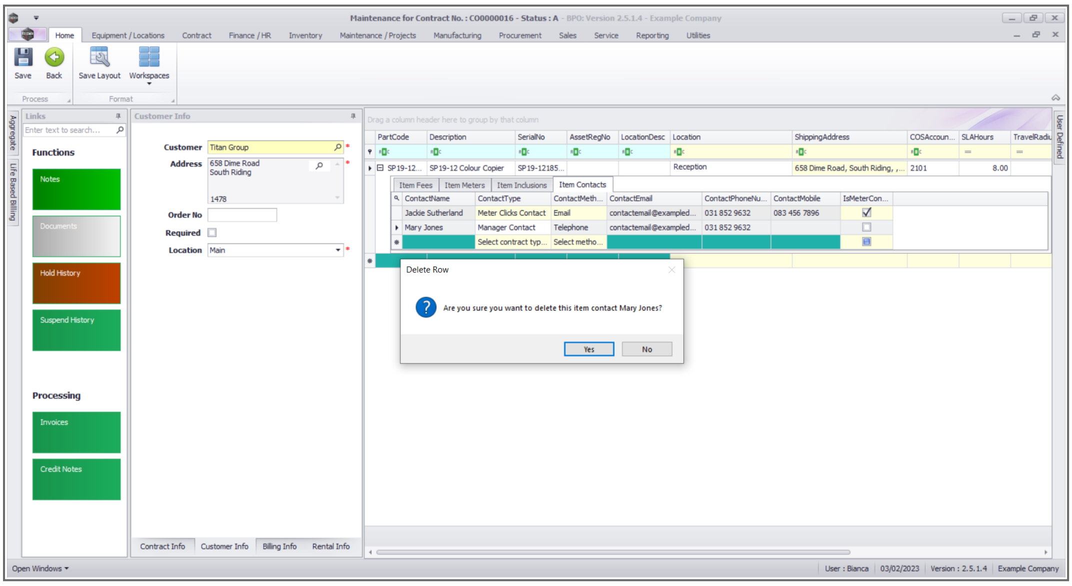


DELETE A CONTACT

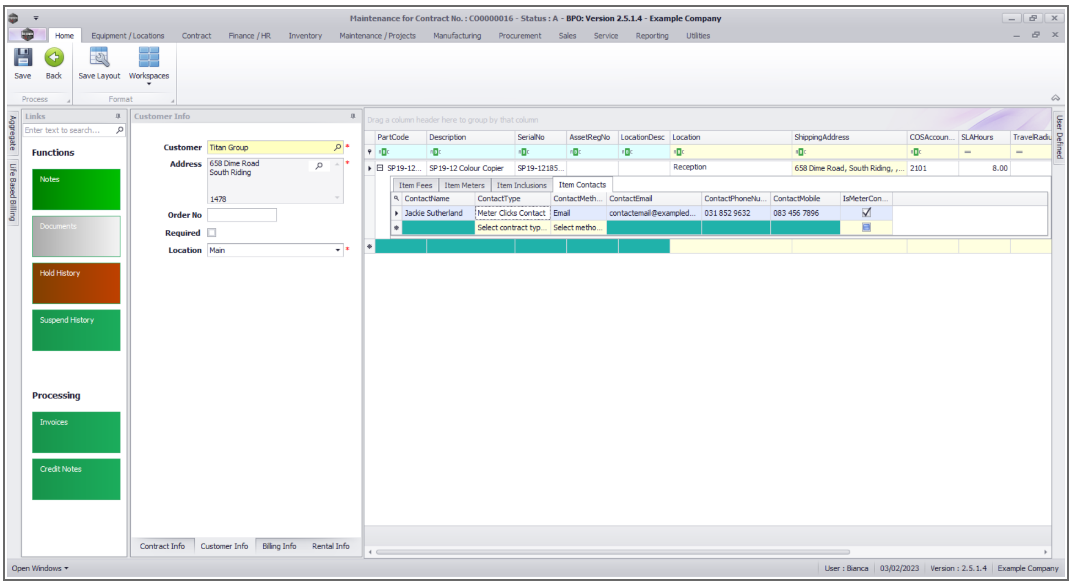
- You can also ***delete*** a contact if required.
- ***Right click*** in the ***row*** of the ***contact*** you wish to ***delete***.
- The ***Process*** menu will pop up.
- Click on ***Delete*** - Delete the contact.



- A ***Delete Row*** message box will pop up asking:
    - ***Are you sure you want to delete this item contact [Serial Number or Location Description]?***
- Click on ***Yes***.



- The contact has now been ***deleted*** from the ***Items Contacts*** frame.



Next: Save the Contract

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