

We are currently updating our site; thank you for your patience.

CONTRACT

ADD NEW CONTRACT

Version Compatibility¹

A Contract is a legally binding agreement between two or more parties involving the transfer of goods and / or services for a fee payable at times agreed by both parties.

Contracts in BPO give you the ability to manage your customer billing. You can link the following to a contract:

- 1 or more **items** (machines or locations)
- 1 or more **accessories**
- **Various Fee Charges**, e.g. Service / Rental
- **Meter Charges** (linked to machines) - Minimum Billing and Unit Charges
- **Inclusions** (parts, services and / or crafts that are included in the contract package and will not be billed)
- **Meter reading contact persons**
- **Notes** and digital contract **documentation**

Unless the **contract type** has been set to **Exclude from Billing** (which is only valid for **Short Term contracts**), contracts will be made part of the month end billing run, depending on whether:

- Billing Start Dates are correctly set for Fees and / or Meters.
- Meter readings have been captured or set to prior reading - if

¹BPO2 v2.5.0.8 or higher.

meters are billed.

- The contract is not suspended.

Contracts need to be [Released](#) and [Approved](#) in order to be **Active**. An Active contract is available for processing, such as being included in contract billing runs, can have service centre calls raised against it, and so forth.

If certain amendments are made on a contract, it will move back to **Released** status and an email will be sent to all users who have the rights to **authorise** a contract. This will notify them to check and re-approve the amended contract.

The following amendments, to any of the following details, will trigger the contract to be moved back into the **Released** status:

- Contract Type
- Customer
- Aggregate Billing flag
- If any contract **item** is added or removed
- If any contract **item fee** is added or removed
- Change of Billing Customer on a fee or meter

And the following Contract **Item Fee** amendments:

- Amount
- Start Date
- End Date
- Escalation %
- Account Code
- COS Account Code
- Invoice Description
- Billing Period
- Billing Cycle

- Finance Party
- Finance Amount

Note: Zero value fees can be added to contracts with a Finance Amount, in order to process Back to Back transactions where the client is not billed.

To set up a Contract, you will need the following:

- A **Customer**
- A **Location** or **Machine** (asset). The asset can be either a company owned **Internal Asset** (machine for rental), or a **Customer-owned Asset**.
- **Meters** linked to the machine - these are required for meter billing.

In BPO2 you can create various types of and combinations of contracts and billing charges. However, there are certain types contracts that required specific configuration.

STANDARD CONTRACTS

These are contract types that are generally created, and labelled as Service or Rental, but you could have a combination of service, rental and location items with various standard billing charges on these contracts.

Service Contract: Machine sold to customer outright / via finance house.

- A **New Deal Sale** must be completed in order to create this contract.

Rental Contract: In-house rental (machine owned by company).

- A **New Deal Rental** must be completed in order to create this contract.

SPECIALISED CONTRACTS

These are contract types that require specific configuration. You may also have a combination of items on these contracts, but the way these contracts are created and billed will be handled differently.

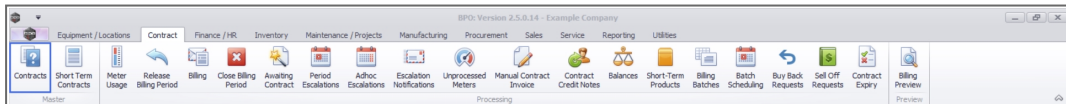
Prepaid Contract:

- This contract type is to be used where a set meter charge was paid ahead of contract creation, and meters are **not** billed until their usage limit / duration is reached. Once the prepaid portion of the contract expires either by duration or usage, aggregate billing set up on the contract commences.

Aggregate Billing Contract:

- Aggregate Billing will group all of the same type of charges that exist across multiple items on the contract into a single charge on the contract invoice. This is used in high volume environments where multiple machines exist on a contract.

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	CustomerD...	ContractType	ContractY...	Location	OrderNo	StartDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Blin
CO000009	DER001	Derton / Technologies		CPC	Cost Per Co...	Durban Area		07/05/2014	07/05/2019	Sales Depar...	60 Months	Months	60 Months	Months	3
CO000016	TIA001	Titan Group		CPC	Cost Per Co...	Main		13/06/2014	13/06/2019	Sales Depar...	60 Months	Months	60 Months	Months	4
CO000018	SAM001	Samanthas Diner		CPC	Cost Per Co...	Main		09/07/2014	09/07/2019	Sales Depar...	60 Months	Months	60 Months	Months	5
CO000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co...	Main		28/07/2014	28/07/2019	Sales Depar...	60 Months	Bi-annual	60 Months	Months	6
PC000001	DAN002	Dancing Shoes		PRE	Prepaid Con...	kloof	test	23/03/2016	23/03/2021	Sales Depar...	60 Months	Months	60 Months	Months	1
CO000031	YES001	Young Electric		CPC	Cost Per Co...	Hillcrest		24/03/2016	24/03/2021	Sales Depar...	60 Months	Months	60 Months	Months	1
CO000041	PAN001	Panda Copiers		CPC	Cost Per Co...	Main		05/07/2016	05/07/2021	Sales Depar...	60 Months	Months	60 Months	Months	5
CO000042	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Main		07/09/2016	07/09/2022	Sales Depar...	60 Months	Months	60 Months	Months	7
CO000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Main		01/08/2016	07/09/2021	Sales Depar...	60 Months	Quarterly	60 Months	Months	5
CO000052	HCP001	Hope Works (Pty) Ltd		PRE	Prepaid Con...	Durban Area		29/05/2017	29/05/2022	Sales Depar...	60 Months	Months	60 Months	Months	3
CO000054	APP001	Apple Juice Inc		CPC	Cost Per Co...	Durban Area		03/08/2017	03/08/2022	Sales Depar...	60 Months	Months	60 Months	Months	0
CO000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area	1234	07/03/2018	07/03/2023	Sales Depar...	60 Months	Months	60 Months	Months	2
CO000073	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		29/05/2018	29/05/2023	Sales Depar...	60 Months	Months	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	60 Months	Months	6
CO000077	PIR0001	Pink Shoes		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	60 Months	Months	4
CO000078	PIR0001	Pink Shoes		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	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	60 Months	Months	2
CO000082	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		10/09/2019	10/09/2024	Sales Depar...	60 Months	Months	60 Months	Months	7
CO000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co...	Durban Area		18/06/2018	18/06/2023	Sales Depar...	60 Months	Months	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	60 Months	Months	8

- Click on the **Add** button.

ContractNo	CustomerC...	CustomerName	CustomerD...	ContractType	ContractTy...	Location	OrderNo	StarDate	EndDate	Department...	Period	PeriodType...	BillingCycle...	BillingPeriod	Bill...
CO0000016	TI4001	Titan Group		CPC	Cost Per Co.	Main		13/06/2014	13/06/2019	Sales Depart...	60 Months	Months	Months	4	
CO0000018	SAM001	Samantha Diner		CPC	Cost Per Co.	Durban Area		09/07/2014	09/07/2019	Sales Depart...	60 Months	Months	Months	5	
CO0000019	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Main		28/07/2014	28/07/2019	Sales Depart...	60 Months	Bi-annual	Months	6	
CO0000031	YES001	Young Electric		CPC	Cost Per Co.	Hillcrest		24/03/2016	24/03/2021	Sales Depart...	60 Months	Months	Months	1	
CO0000041	PAN001	Panda Copiers		CPC	Cost Per Co.	Main		05/07/2016	05/07/2021	Sales Depart...	60 Months	Months	Months	5	
CO0000043	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Main		01/08/2016	07/09/2021	Sales Depart...	60 Months	Quarterly	Months	5	
CO0000072	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area	1234	07/03/2018	07/03/2023	Sales Depart...	60 Months	Months	Months	2	
CO0000074	DER001	Derton / Technologies		CPC	Cost Per Co.	Durban Area	1234	15/06/2018	15/06/2023	Sales Depart...	60 Months	Months	Months	6	
CO0000077	PPH0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO0000078	PPH0001	Pink Shoes		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	
CO0000080	OFF001	Office Supplies Unlimited		CPC	Cost Per Co.	Durban Cen...	1234	06/05/2017	06/05/2020	Sales Depart...	60 Months	Months	Months	2	
CO0000079	HCP001	Hope Works (Pty) Ltd		CPC	Cost Per Co.	Durban Area		18/06/2018	18/06/2023	Sales Depart...	60 Months	Months	Months	4	

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

Contract Info

Contract No:

Contract Type:

Contract Class:

Contract Category:

Start Date: 09/01/2023

End Date: 09/01/2028

Period:

Period Type:

Department: Sales Department

Contract Manager:

Salesman:

Aggregate Billing:

Hide Fee Detail:

PartCode	Description	SerialNo	AssetRegNo	LocatorDesc	Location	ShippingAddress	COSAccount	SLA/Hot

CONTRACT INFO PANEL

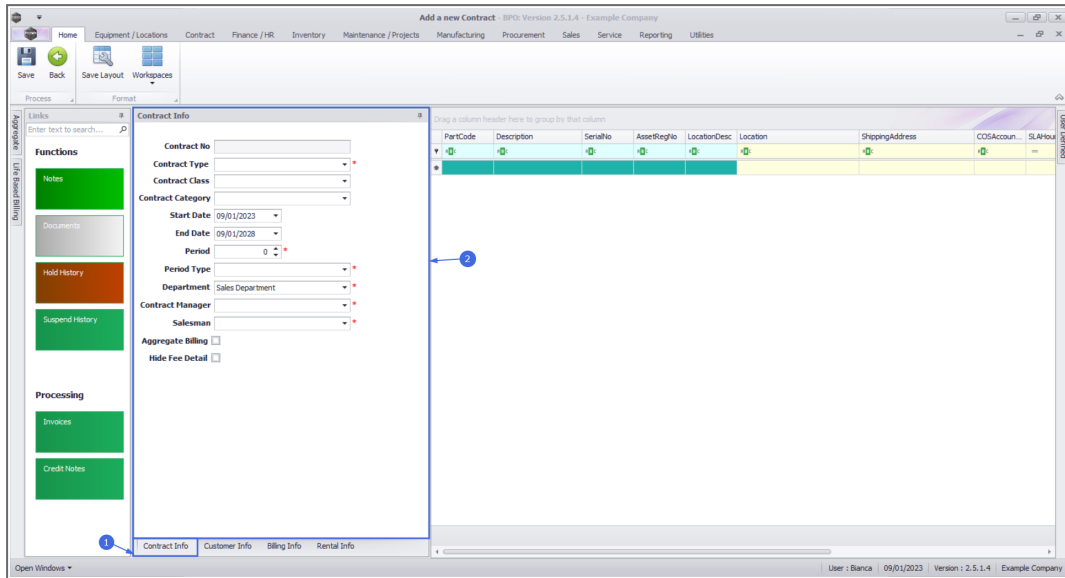
Upon opening this screen, the Info panels are docked, with the **Contract Info** panel at the fore. If not, click on the **Contract Info** tab.

- **Contract No:**
 - If this field is greyed out, then your system is configured to auto generate the contract number upon saving the contract. This is generated by the system (if the **Auto Contract flag** is selected in **BPO Configurator**).
- **Contract Type:** Click on the drop-down arrow and select the **Contract Type**, e.g. **Cost per Copy**.
 - **For Prepaid Contracts:**
 - This is used when creating a Prepaid / Life Based contract.
 - Before you select the Contract Type, you will note that the **Life Based Billing** tab is currently docked on the **left** side of the screen.
 - In the **Contract Type** field, **Prepaid Contract** must be selected from the drop-down menu.
 - After selecting the **Prepaid Contract** option, the **Life Based Billing** tab will move to the bottom of the screen.
- **Contract Class**¹: Click on the drop-down arrow and select the **Contract Class**
- **Contract Category:** Click on the drop-down arrow and select the **Contract Category**

¹A Call Request is logged to form a record of a request from a customer whose account is in arrears, on hold, or whose contract is on hold. No corresponding action will be performed to address the request until the customer or contract is no longer on hold, or the account has been settled.

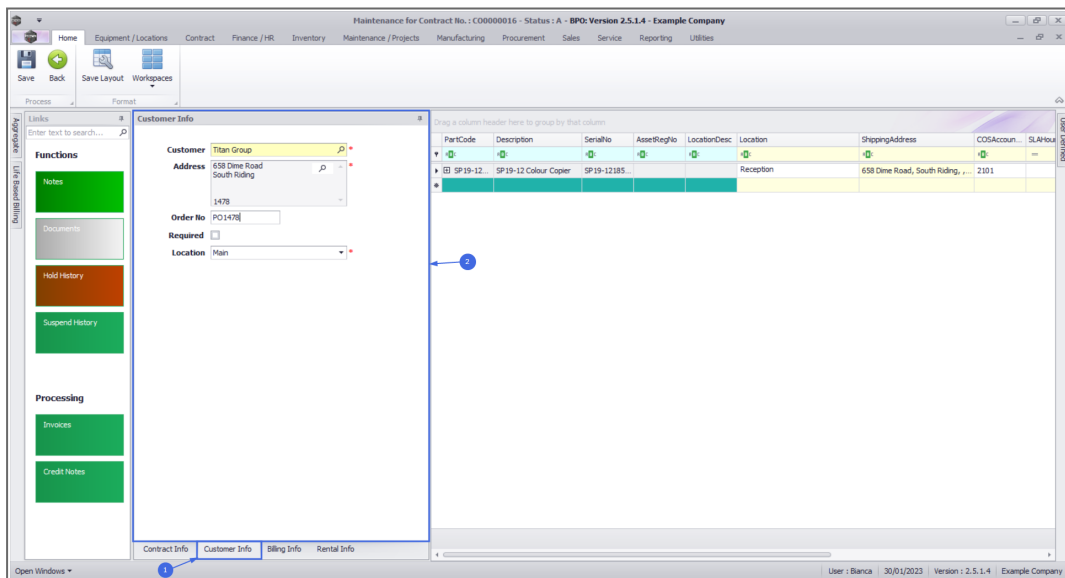
- **Start Date:** This will auto populate with the current date, but you can click on the drop-down arrow and use the calendar function to select an alternative date.
- **End Date:** This will auto populate **5** years from the start date, but you can click on the drop-down arrow and use the calendar function to select an alternative end date if required.
 - **Note:** If this is an evergreen contract, set your end date to 31/12/2999
- **Period:** This will auto populate when the Contract Type is selected but you can either type in or use the arrow indicators to select an alternative period (life span of the contract).
- **Period Type:** This will auto populate when the Contract Type is selected but you can click on the drop-down arrow and select an alternative period type (measure relating to the lifespan), e.g. months.
- **Department:** Click on the drop-down arrow and select the department.
- **Contract Manager:** Click on the drop-down arrow and select the contract manager.
- **Salesman:** Click on the drop-down arrow and select the salesman.
- **Aggregate Billing:** Click on this check box if the customer will receive aggregate billing.
 - **For Aggregate Billing Contracts:**
 - This is used when creating an Aggregate contract or Prepaid / Life Based contract.
 - Note that the **Aggregate** tab is currently docked on the **left** side of the screen.
 - Select the **Aggregate Billing** check box.
 - The **Aggregate** tab will move to the bottom of the screen.

- **Hide Fee Detail:** Select this option if you don't want to show individual contract invoice fee amounts on the customer invoice.



CUSTOMER INFO PANEL

- When you have finished editing the contract info details, click on the **Customer Info** tab.

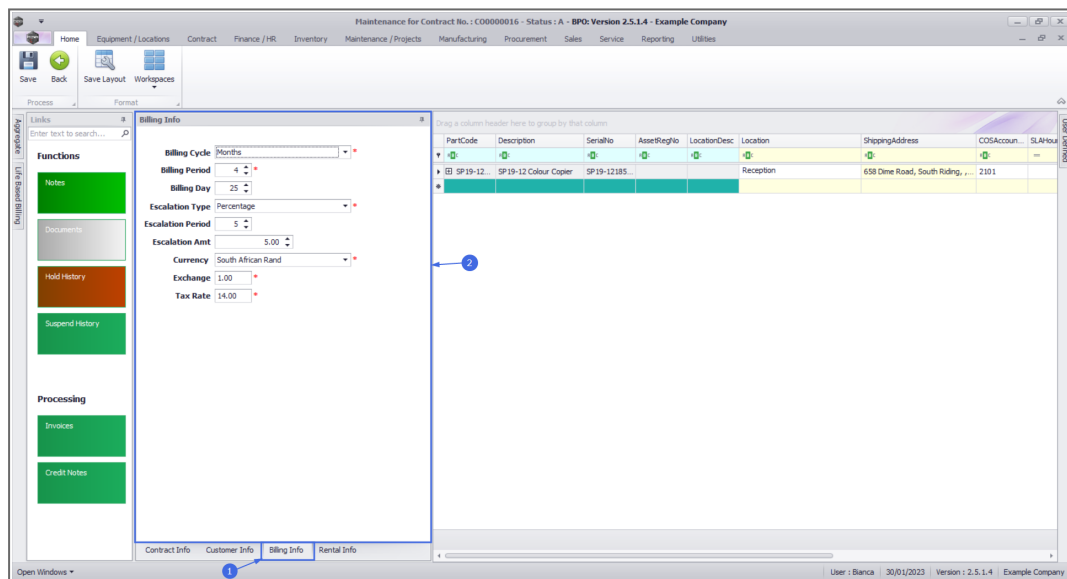


The **Customer Info** panel will move to the fore.

- **Customer:** Click on the search button and select the customer from the **Select a customer for this contract** pop up screen.
- **Address:** This will auto populate when the Customer is selected but you can click on the search button and select an alternative address from the **Select an address for this contract** pop up screen.
- **Order No:** Type in the customer order number if required.
- **Required:** Only select this check box if the client must supply an order number before a technician is sent to site.
- **Location:** Click on the drop-down arrow and select the contract location from the menu.

BILLING INFO PANEL

- When you have finished editing the contract info details, click on the **Billing Info** tab.



The **Billing Info** panel will move to the fore.

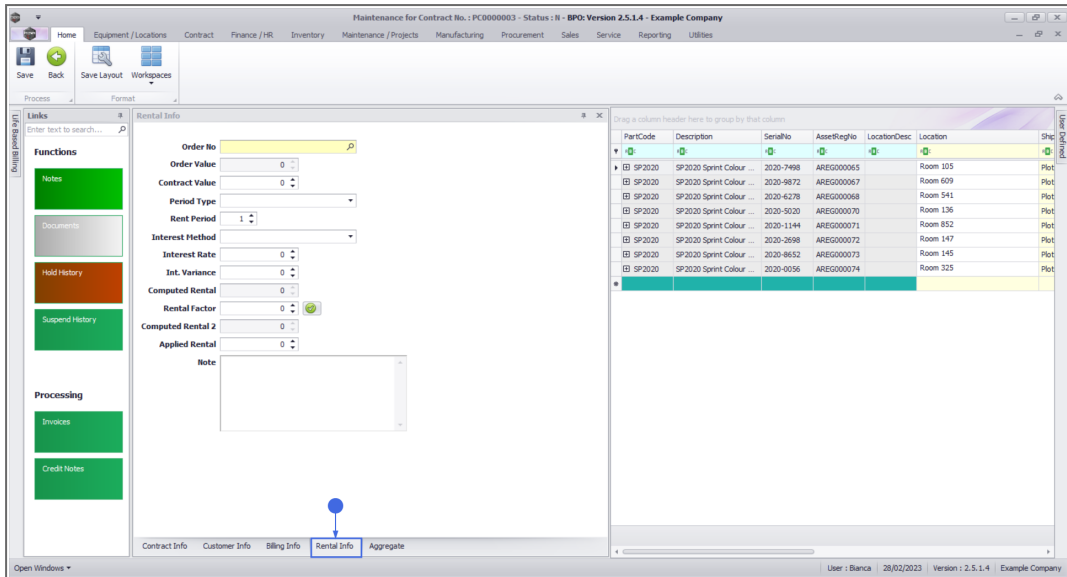
- **Note:** Most of these details will auto populate but they can be changed, as explained below.
- **Billing Cycle:** Click on the drop-down arrow and select the billing cycle (billing frequency, e.g. monthly).
- **Billing Period:** This is the period when the contract will be billed for the first time. Type in or use the arrow indicators to select the period number.
 - **Note:** The Billing Period relates to the **financial period** of the company e.g. if the company's financial year ends on 31 December and a contract is to be billed in February, the Billing Period would be 2.
- **Billing Day:** The Billing Day can be used if you are billing different contracts on different days or can be used as a filter in the **Contract Billing** screen. The Billing Day is limited to 31. Type in the day that the customer will be billed (e.g. on the 25th of each billing cycle) otherwise leave as 0.
- **Escalation Type:** Search for and select an escalation type (usually percentage is used).
- **Escalation Amount:** Type in the escalation amount, depending on the escalation type selected (e.g. 10 if the escalation should be 10%).
- **Escalation Period:** Type in the financial month at which the system should escalate the contract.
 - **Note:** The Escalation Period relates to the **financial period** of the company e.g. if the company's financial year ends on 31 December and a contract is to be escalated in March, the Escalation Period would be 3. If the escalation is on the anniversary of the contract, then use the same financial period as the billing period.

- **Currency:** The system will auto populate with the currency already set up on the customer, but you can click on the drop-down arrow and select an alternative currency if required.
 - **Note:** For foreign currency contracts, all fee and meters charges must be set up in the currency selected e.g. type in the Dollar amount if the currency is USD.
- **Exchange:** The system will auto populate with the exchange rate set up in the system, but you can type in an alternative exchange rate.
- **Tax Rate:** The system will auto populate with the tax rate set up in the system, but you can type in an alternative tax rate.

RENTAL INFO PANEL

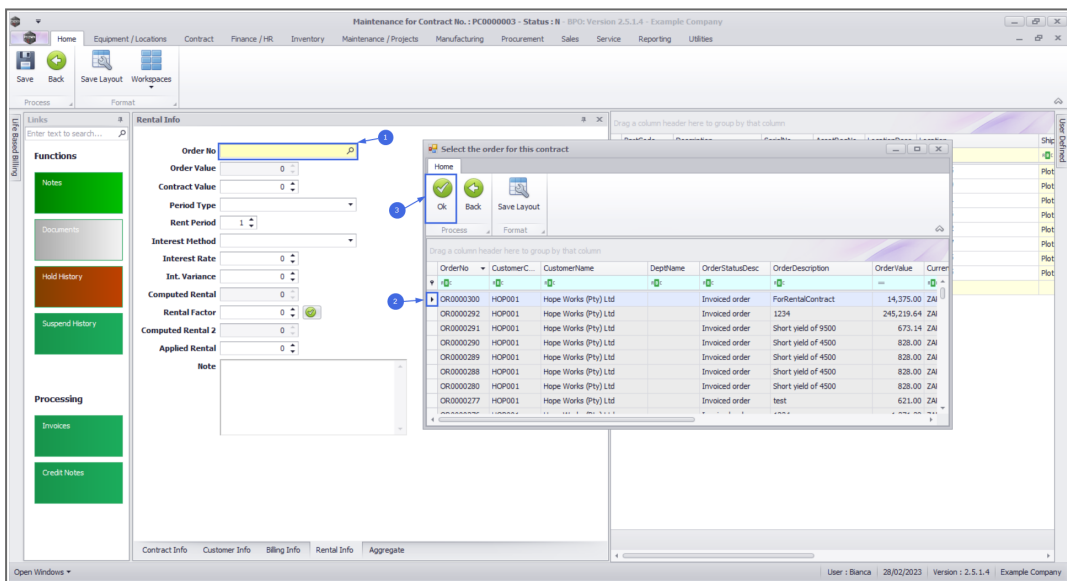
This is used where a [New Deal Rental](#) was processed on the system and is a tool for calculating the rental amount for the deal on the contract, especially where the deal is financed and the correct repayment is claimed from the customer and paid to the finance house.

- Click on the **Rental Info** tab.

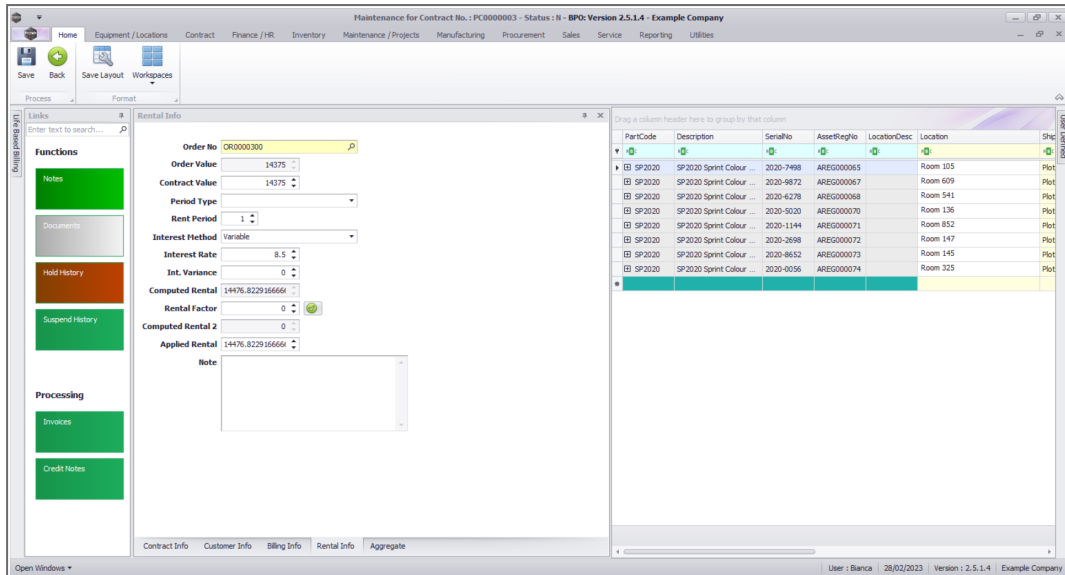


The **Rental Info** panel will move to the fore.

- **Order No:** Search for and select the sales order created for the New Deal Rental.



You will note that the **Order No** and a number of fields auto populate once the Order Number has been selected.

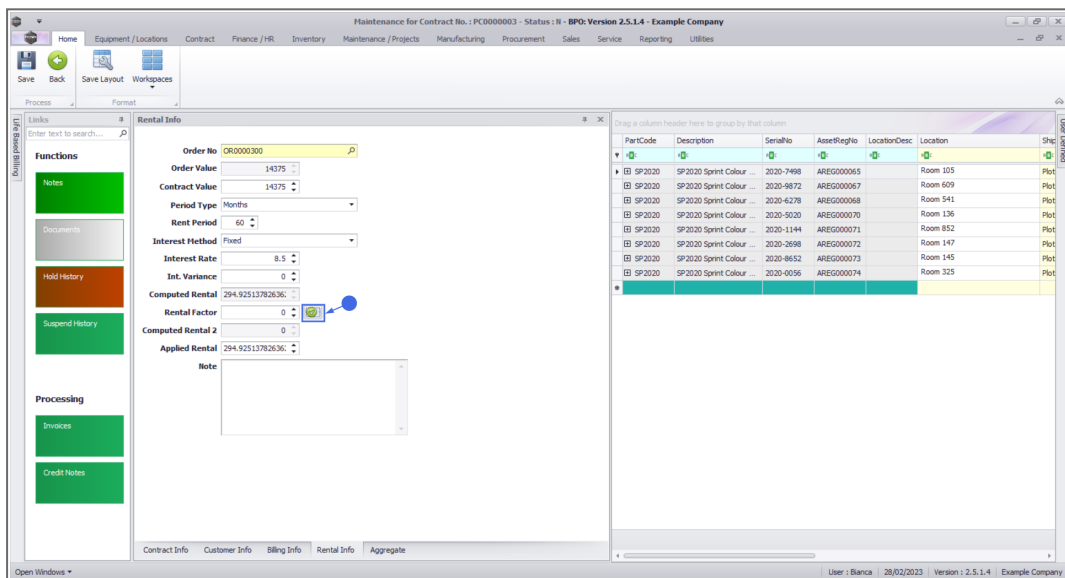


- **Order Value:** Upon selection of the Sales Order Number, this value will populate with the total from the Sales Order (including VAT). This field is read only and cannot be changed.
- **Contract Value:** Upon selection of the Sales Order Number, this value will populate with the total from the Sales Order (including VAT). You can amend this value if the Contract Value differs due to additional costs not logged on the originating Sales Order.
- **Period Type:** Use the drop down list to select the rental period type. This field correlates to **Rent Period**. For example, you might set this field to **Months** where you are noting the number of months for the rental period, e.g. **60 months**.
- **Rent Period:** Type in or use the spin edit to set the number related to the **Period Type** above, e.g. **60** months.
- **Interest Period:** Use the drop down list to select whether the Interest Period is **Fixed** or Variable.
- **Interest Rate:** Upon selection of the Sales Order Number, this value will populate with the rate as configured in [Interest Rates](#). This can be changed by typing into the field or using the spin edit.

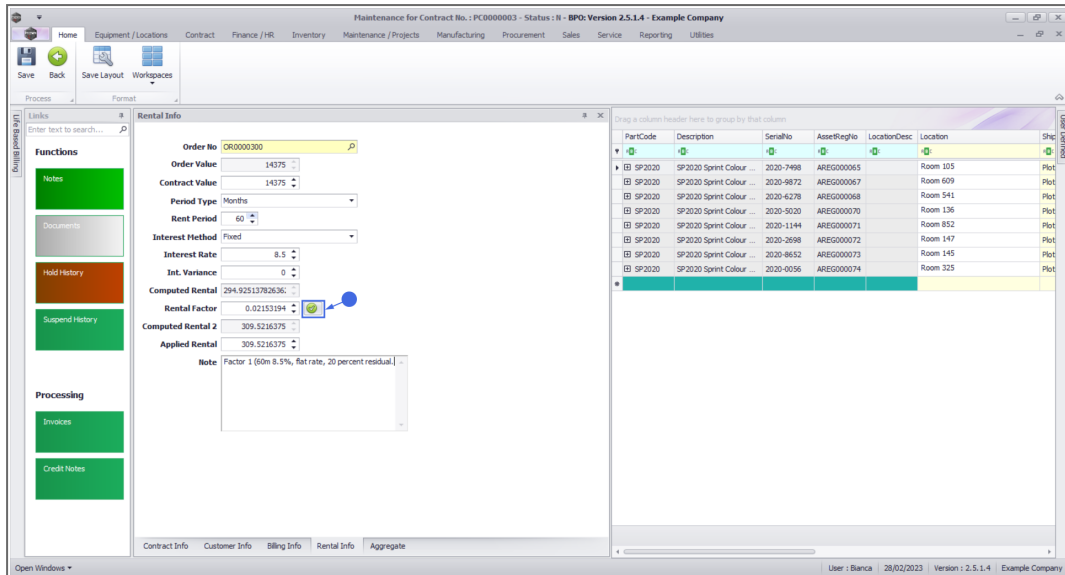
- **Interest Variance:** This variance relates to Variable interest method. Type in or use the spin edit to set this value, if required.
- **Computed Rental:** Upon selection of the Sales Order Number, this value will populate with the total from the Sales Order (including VAT). This field is read only and will only change upon calculation of the rental as noted further down.

At this point, you can calculate the Applied rental.

- Click on the **Recalculate Rentals** button.
- The **Computed Rental** and **Applied Rental** values will repopulate according to the details provided.



- **Rental Factor:** If you will be applying a rental factor, type in or use the spin edit to set the value.
- Click on the **Recalculate Rentals** button.
- The **Applied Rental** value will repopulate according to the details provided.



- **Note:** Type in any notes you have regarding this rental calculation.
- You can now update the rental fee on the relevant item(s) on the contract.

AGGREGATE BILLING PANEL

This is used when creating an Aggregate contract or Prepaid / Life Based contract.

- Note that the **Aggregate** tab is currently docked on the **left** side of the screen.
- Select the **Aggregate Billing** check box.
- The **Aggregate** tab will move to the bottom of the screen.

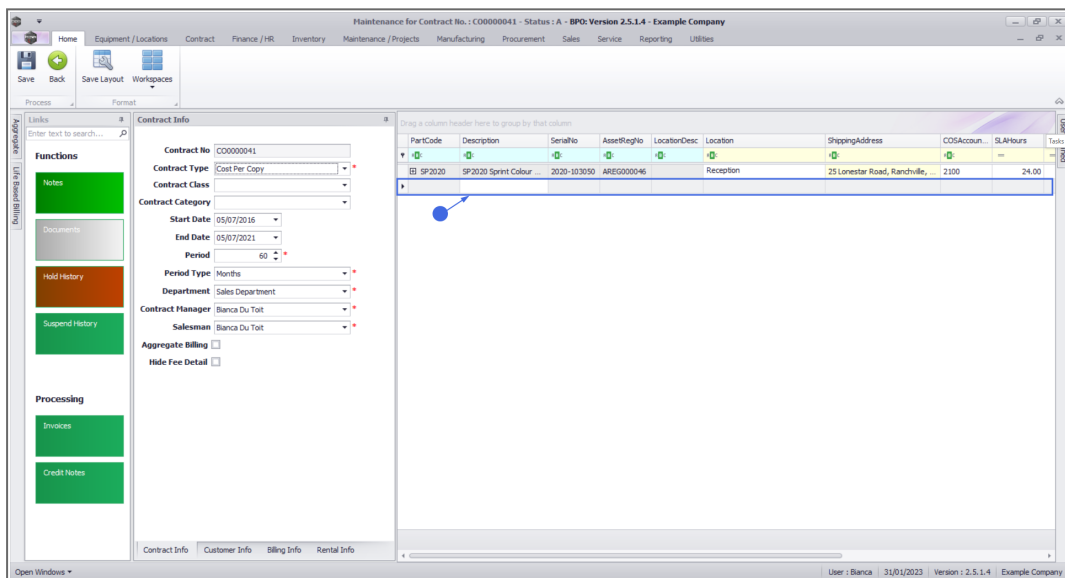
LIFE BASED BILLING PANEL

This is used when creating a Prepaid / Life Based contract.

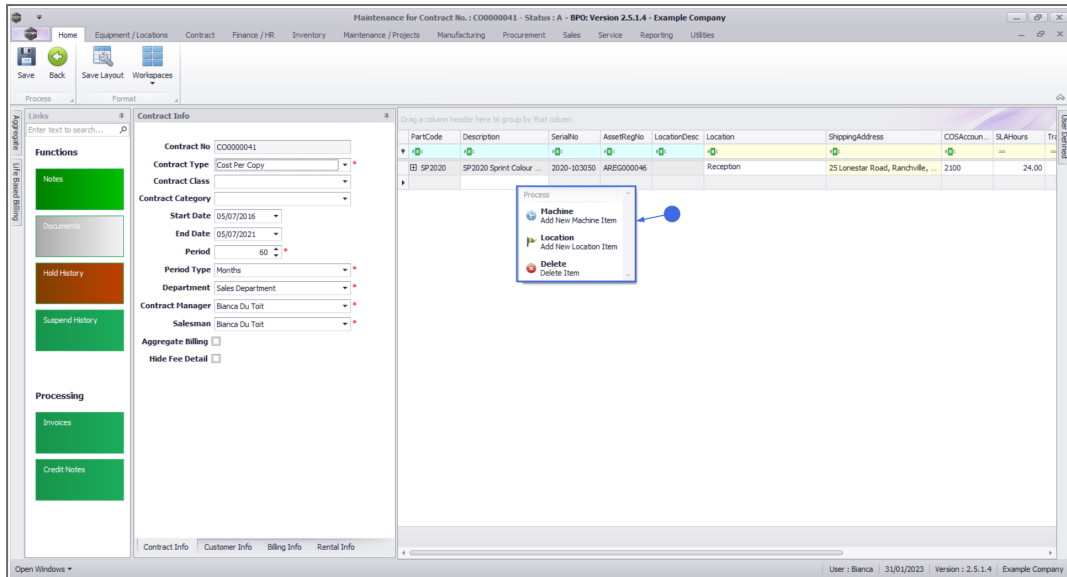
- Before you select the Contract Type, you will note that the **Life Based Billing** tab is currently docked on the **left** side of the screen.
- In the **Contract Type** field, **Prepaid Contract** must be selected from the drop-down menu.
- After selecting the **Prepaid Contract** option, the **Life Based Billing** tab will move to the bottom of the screen.

CONTRACT ITEMS FRAME

- **Right click** anywhere in the **row** of the **Contract Items** frame.



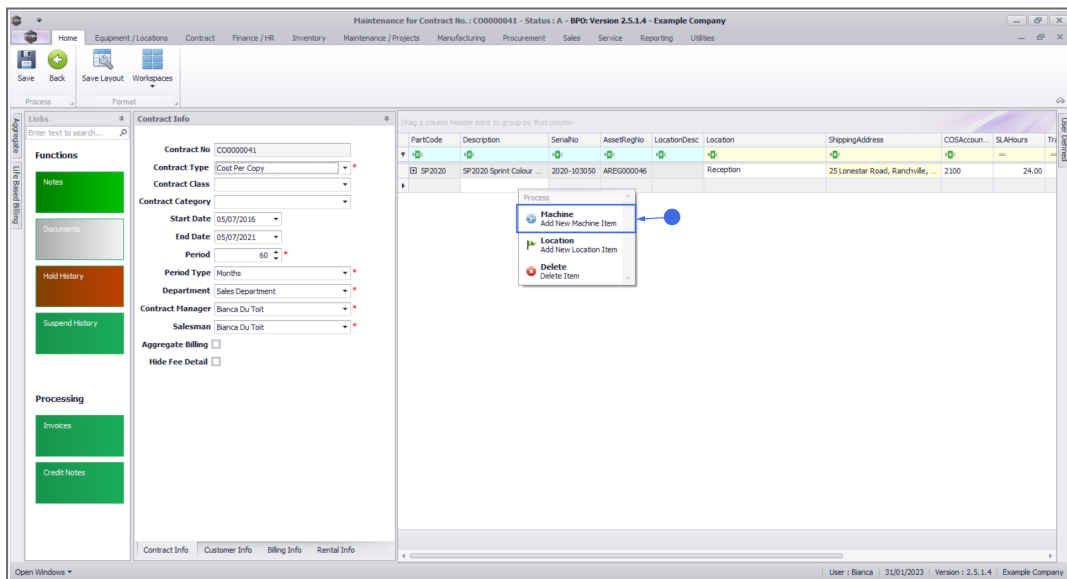
- A **Process** menu will pop up.
- From this menu, you can:
 - Add a new machine item
 - Add a new location item
 - Delete a contract item



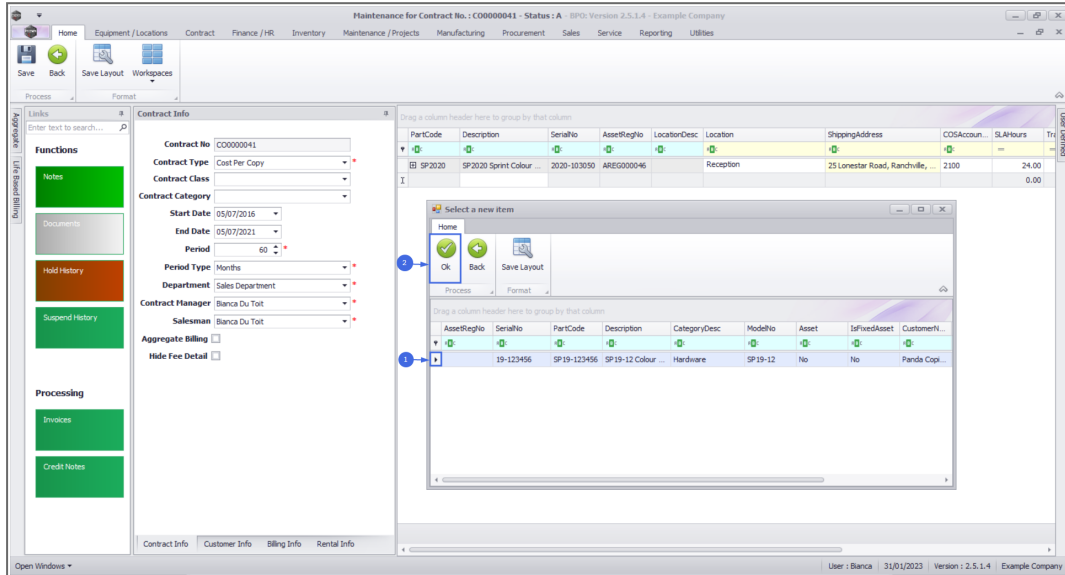
ADD NEW MACHINE ITEM

Where you have a serialised item that requires maintenance or service, the item can be linked to the contract.

- Click on **Machine** - Add New Machine Item.

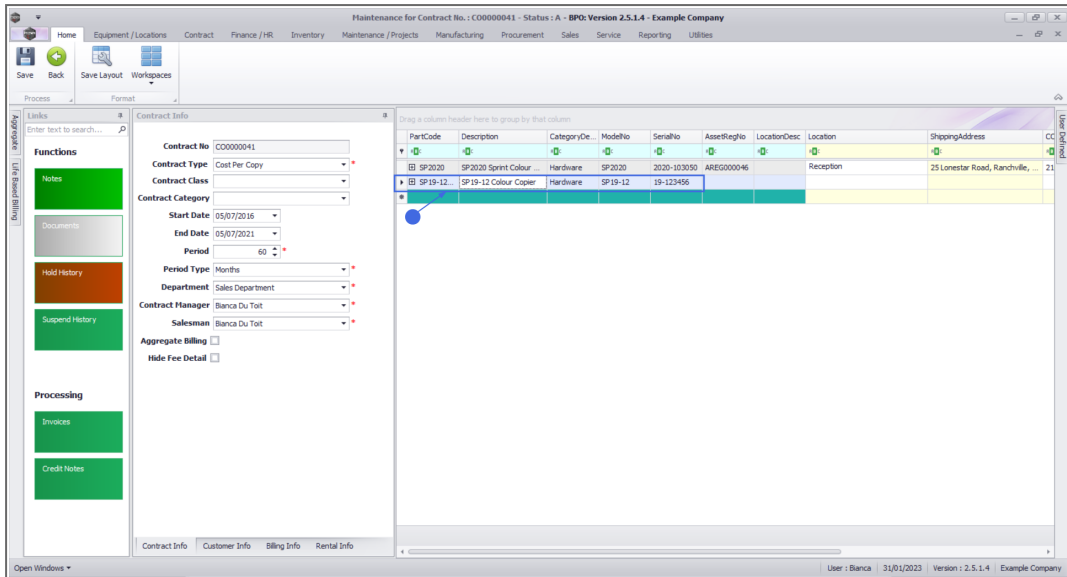


- The **Select a new item** pop up screen will appear, listing all customer assets sold to or created against this customer; or rental assets issued to this customer.
- Select the **row** of the **item** that you wish to **link** to this contract.
- Click on **Ok**.



- The following columns will auto populate according to your item selection:
 - **Part Code**
 - **Description**
 - **Category Description**
 - **Model No** if configured on the asset's part code
 - **Serial No**
 - **Asset Register No** if configured on the asset

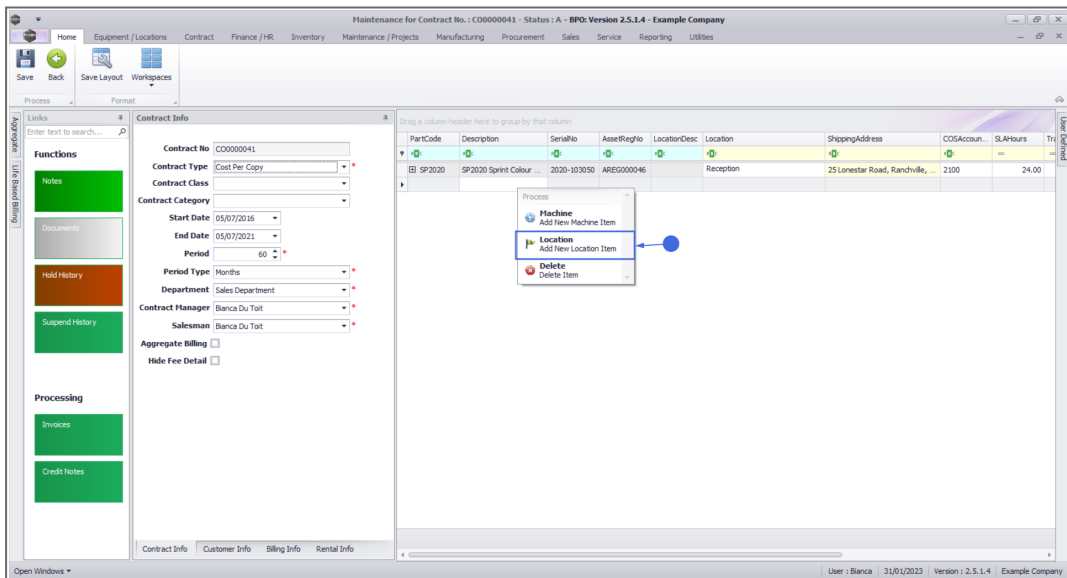
Note: The **LocationDesc** column will not be populated as this is a Machine (asset) Contract item and not a Location Contract Item.



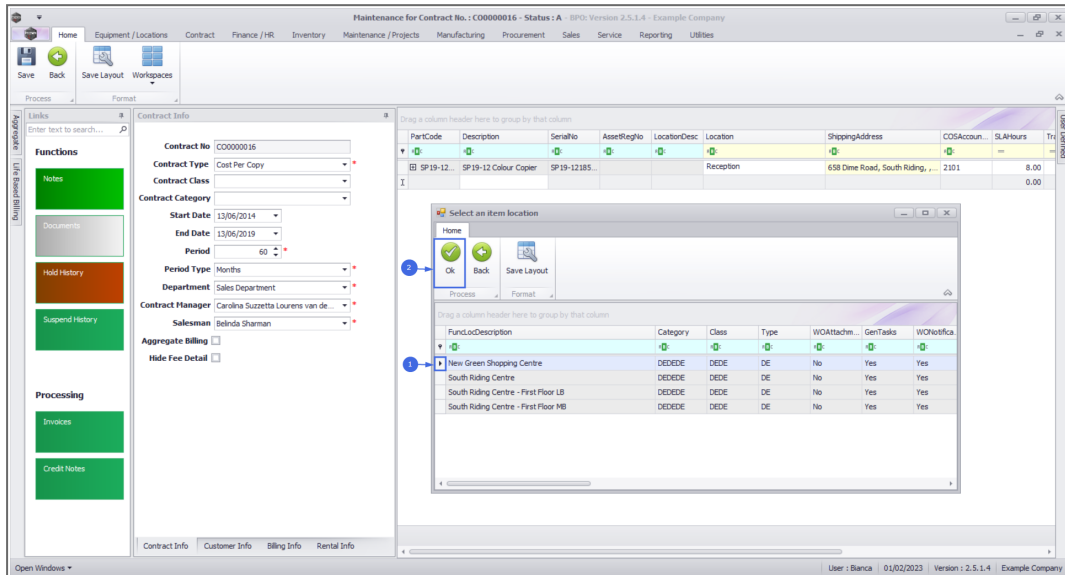
ADD NEW LOCATION ITEM

Instead of linking a serialised item, you have the ability to link a location to the contract. This can be used where a room or building requires maintenance or service.

- Click on **Location** - Add New Location Item.

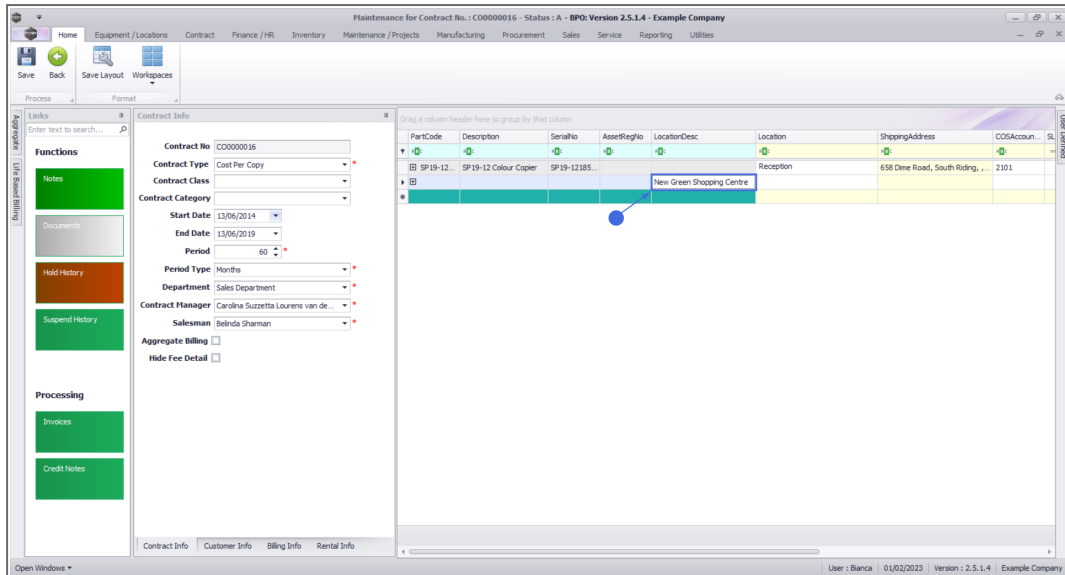


- The **Select a new item** pop up screen will appear, listing all customer locations.
- Select the **row** of the **item** that you wish to **link** to this contract.
- Click on **Ok**.



- The following columns will auto populate according to your item selection:
 - **LocationDesc**
 - **Description**
 - **Category Description**
 - **Model No** if configured on the asset's part code
 - **Serial No**
 - **Asset Register No** if configured on the asset

Note: The **PartCode**, **Description**, **Category Description**, **Model No**, **Serial Number**, and **Asset Register No** columns will not be populated as this is a Location Contract item and not a Machine (asset) Contract Item.



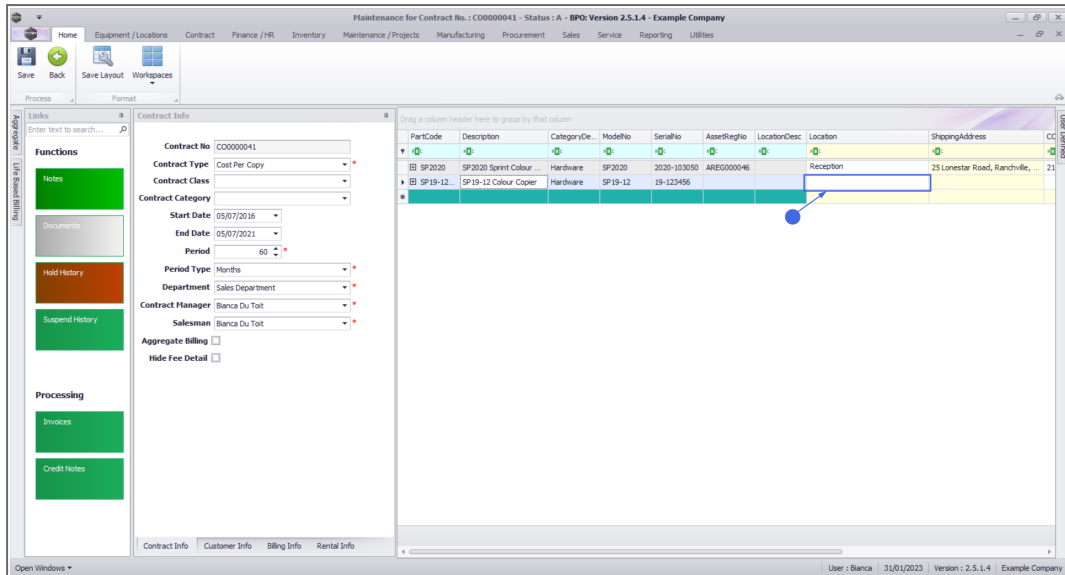
CONTRACT ITEM MAIN DETAILS

Whether you are linking a Machine or Location, the following item details should be configured.

Link Location

This is the location of the contract item, e.g. Reception, used to assist the technician with finding the item on site.

- Click in the **Location** text box.
- Type in a **Location** for this item.

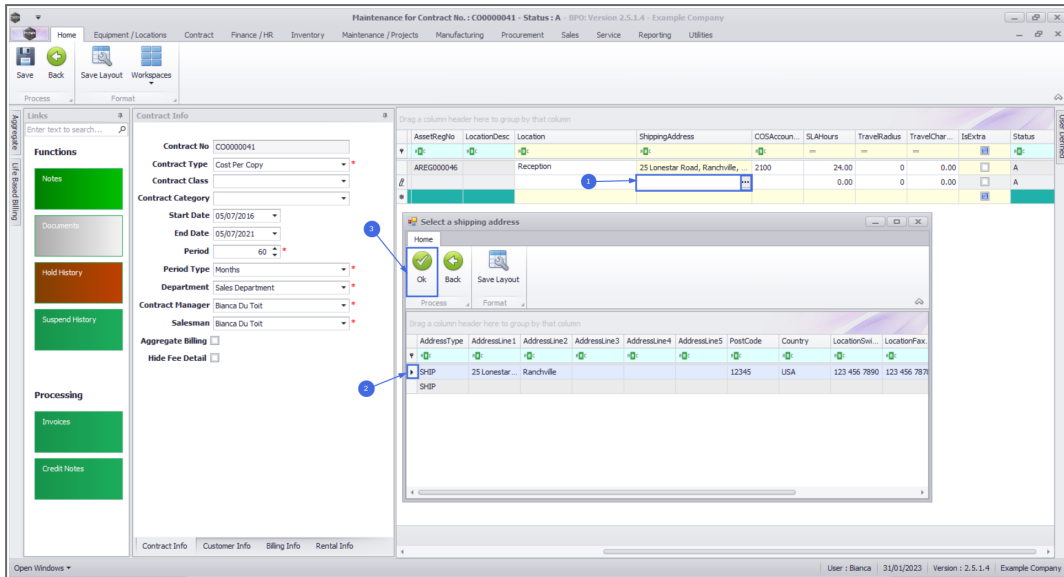


Link Shipping Address

This is the physical address where the contract item is.

A new company config flag ([AutoUpdateShippingAddress](#)) is available in BPO2 v2.5.0.8 (or higher) / Nucleus Service to control automated shipping address updates in the system between contract items and equipment shipping addresses/ functional location shipping address and ensures the shipping address correlates to contract items shipping address. When you update the shipping address on a contract the shipping address will reflect on the asset or functional location. If the user updates the asset or functional location's shipping address, the shipping address will reflect on the contract item.

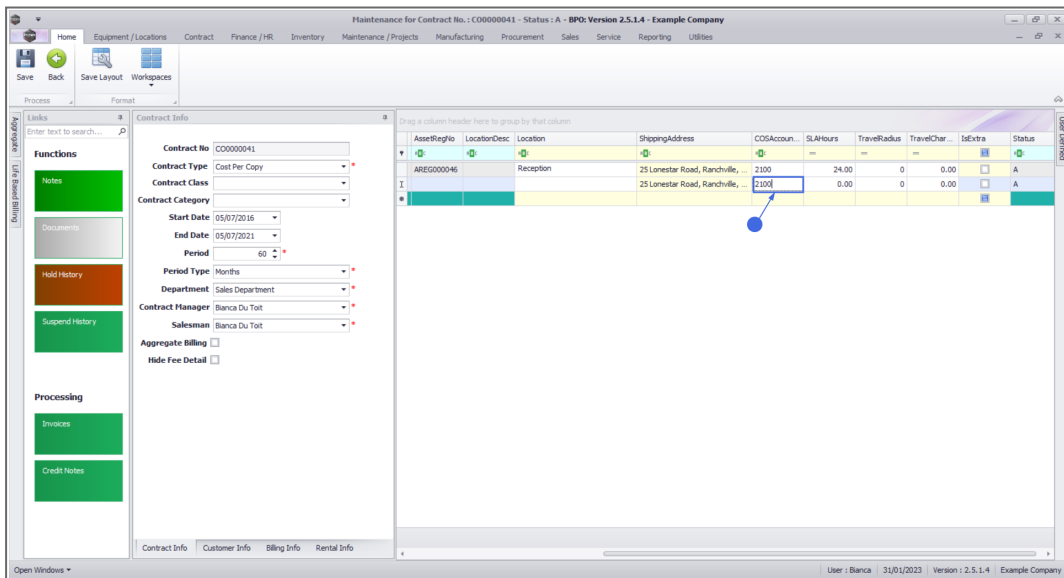
- Click in the **Shipping Address** text box.
- An **ellipsis** button will be revealed.
- Click on this button to display the **Select a shipping address** pop up screen.
- Select the **row** of the **shipping address** that you wish to **link** to this item.
- Click on **Ok**.



- Scroll right to view the remaining columns in the **Items** frame.

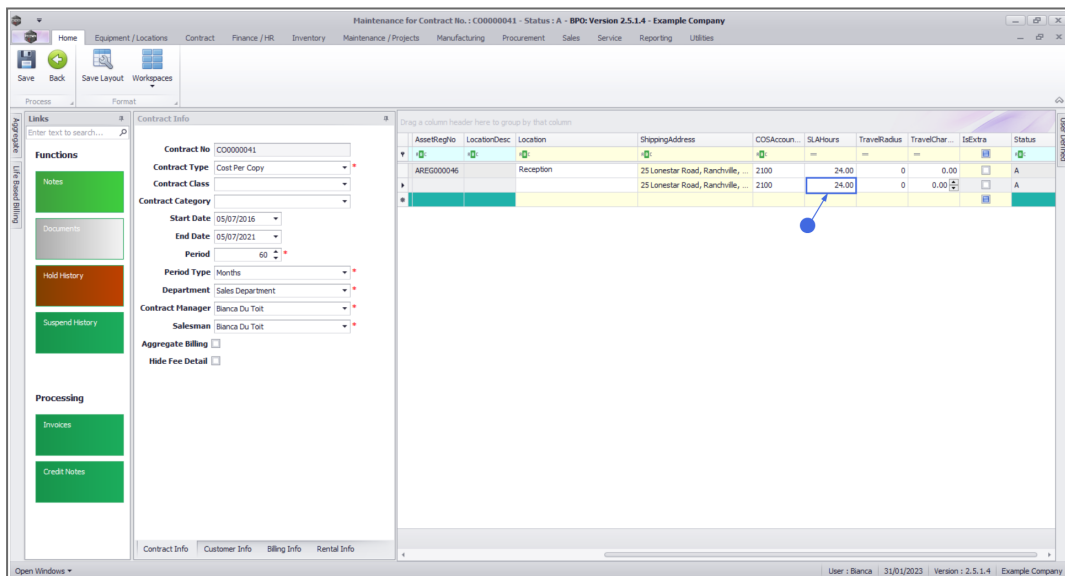
Link COS Account Code

- Click in the **COS Account Code** text box.
- Type in the **Cost of Sales account code** to be used for WIP (Work In Progress) transaction postings (non-billable toner and spare parts issued as contract included items).



Link SLA Hours

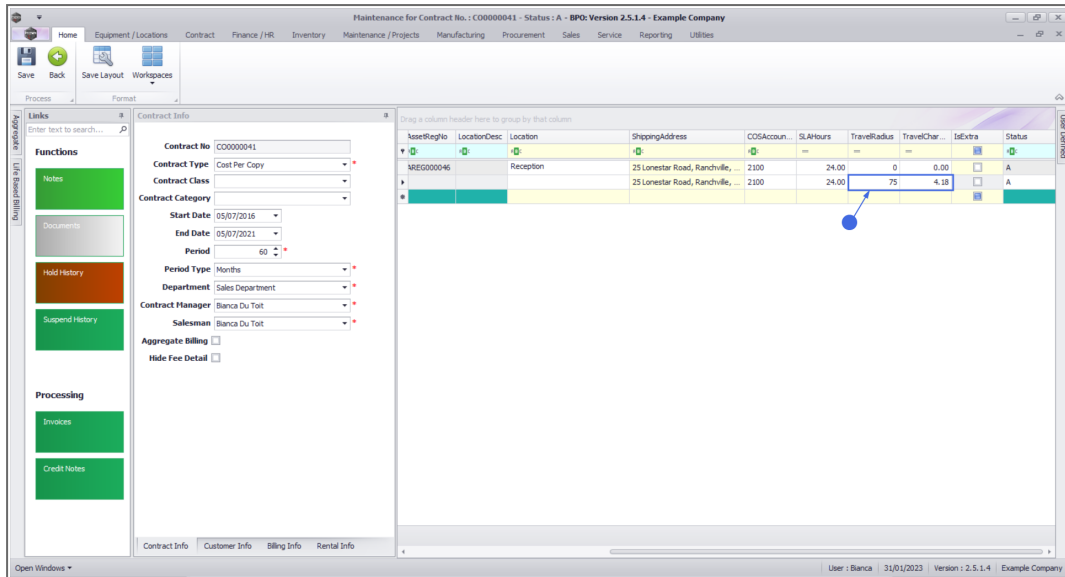
- Click in the **SLA Hours** text box.
- Type in or use the arrow indicators to select the required call response time (in hours) if applicable.
 - **Note 1:** If this is set up, **SLA** will apply every time a call is logged against the contract / contract item. **SLA** will be calculated based on the shift pattern (customer's trading hours) e.g. if the trading hours are from 8am - 5pm and a call is logged at 4pm, **SLA** will start calculating at 4pm and stop at 5pm and resume the following day at 8am.
 - **Note 2:** For **SLA** to work, the **shift** must be set up in **BPO Configurator** and **linked to the customer**.
 - **Note 3:** The SLA Monitoring Service must be **installed, configured** and running to fully utilise this functionality.



Link Travel Radius and Travel Charge

If you need to ensure travel is charged each time a call is raised for the contract item, set up a **Travel Radius** (distance) and **Travel Charge Rate** (per km). Also see [Travel Radii](#).

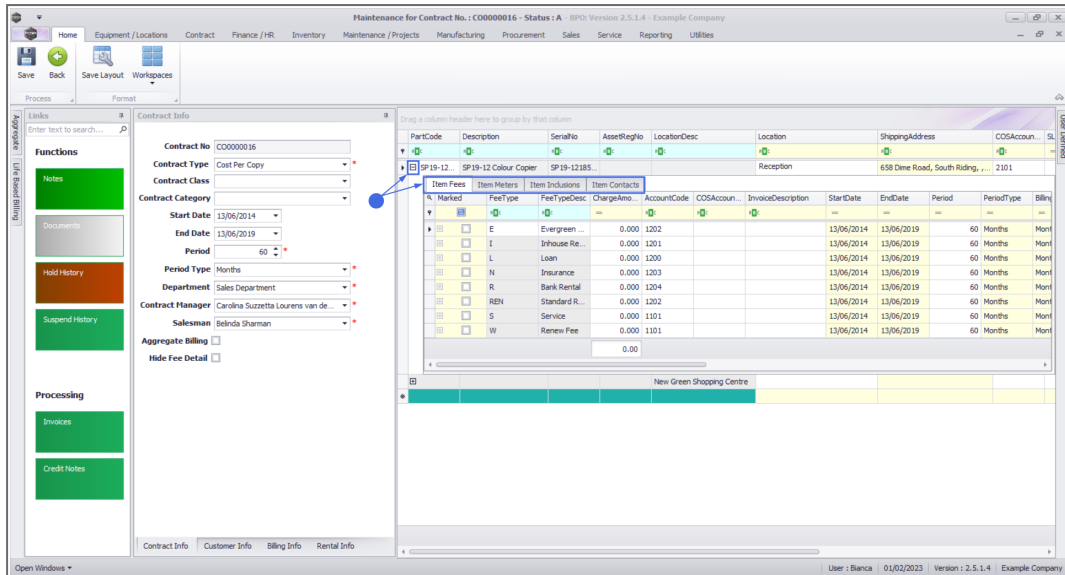
- Click in the **Travel Radius** text box.
- Type in or use the arrow indicators to select the distance in km to and from the client, if this travel is to be billed every time a call is logged. If travel is included, then set this to **0**.
 - **Note:** Travel can always be billed separately, if required.
- Click in the **Travel Charge Rate** text box.
- Type in or use the arrow indicators to select the travel charge rate (e.g. Rand per kilometre).
 - **Note:** If you input a non-zero value, each time a call is logged against the contract item and the technician travels outside the specified **Travel Radius**, the **Travel Charge Rate** will be applied. You will not be able to close the call until the travel charges incurred are invoiced.



- The **Is Extra** flag is to indicate whether the item is an accessory to the main item on contract.
- The **Status** field is static and there to show you the that the item is active.

CONTRACT ITEM ADDITIONAL DETAILS

Whether you are linking a Machine or Location, the following item details should be configured, where applicable.



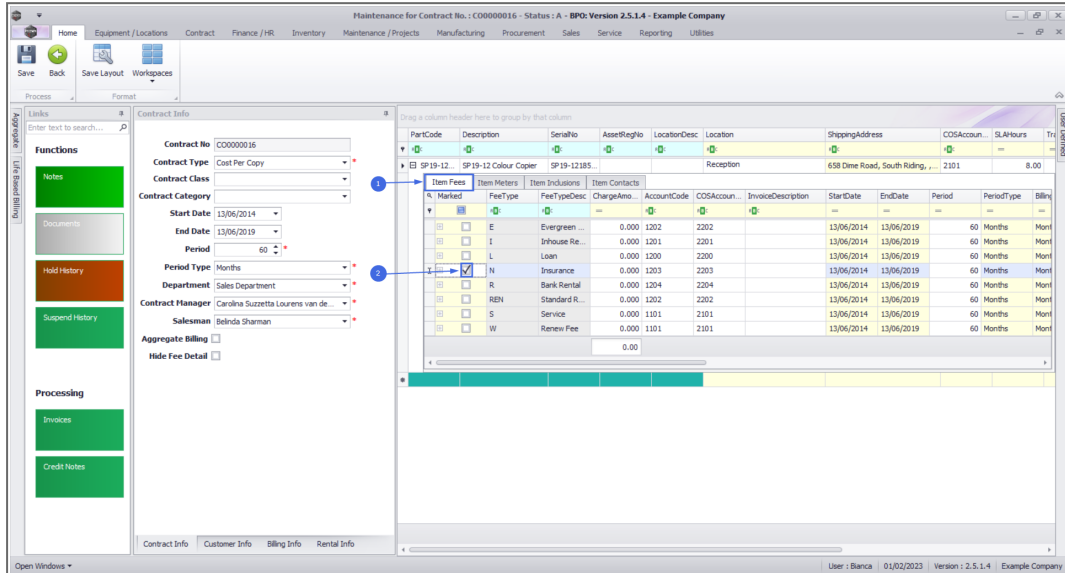
- Here you can click on four different tabs to add or edit:
 - **Item Fees:** periodic charges e.g. monthly
 - **Item Meters:** meter usage charges
 - **Item Inclusions:** non billable items that are included in the contract
 - **Item Contacts:** the contact person - per machine.

Item Fees

- The **Item Fees** frame displays **Contract Item Fees** that can be linked or are linked to a contract item. **Note** that the fee types available for selection are dependant on the fees configured for the selected **Contract type**.
- Linked Item Fees will be included on the Contract invoice during Contract billing, where within the period defined.

Add Item Fee

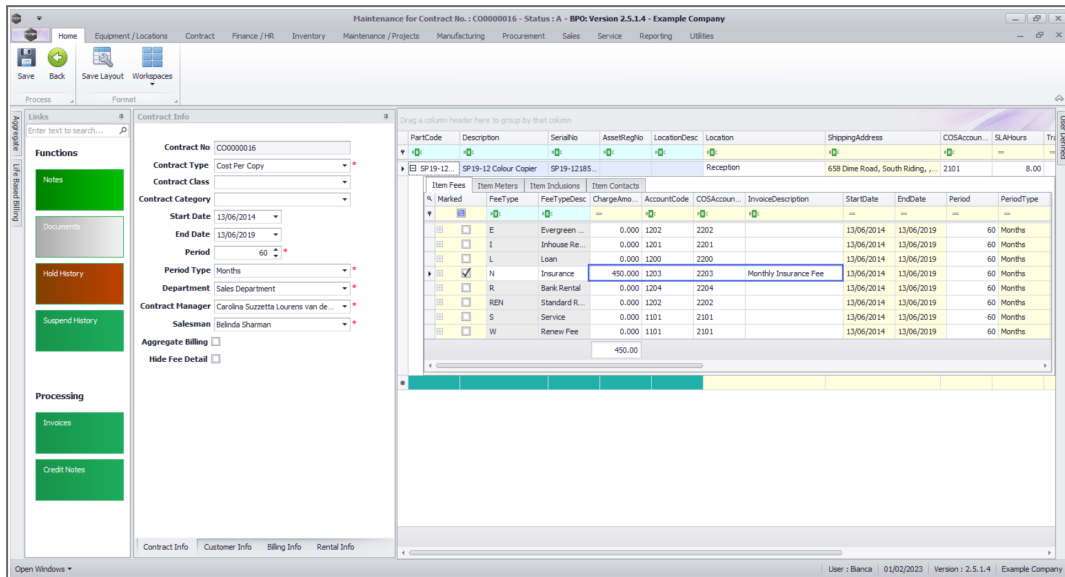
- **Marked:** Click on the check box in front of the Item **Fee Type** to be charged on the contract item.



Billing Details

- **Charge Amount:** Type in or use the arrow indicators to select the fee amount to be charged.
- **Account Code:** This will auto populate with the Sales GL Account code set on the fee as **configured** for the contract type. This code can be changed if required, but ensure a valid general ledger code is used.
- **COS Account Code:** This will auto populate with the Sales GL Account code set on the fee as **configured** for the contract type. This code can be changed if required, but ensure a valid general ledger code is used.

- **Invoice Description:** Type in the description to be used for this fee on the invoice. The description will reflect on the contract invoice.

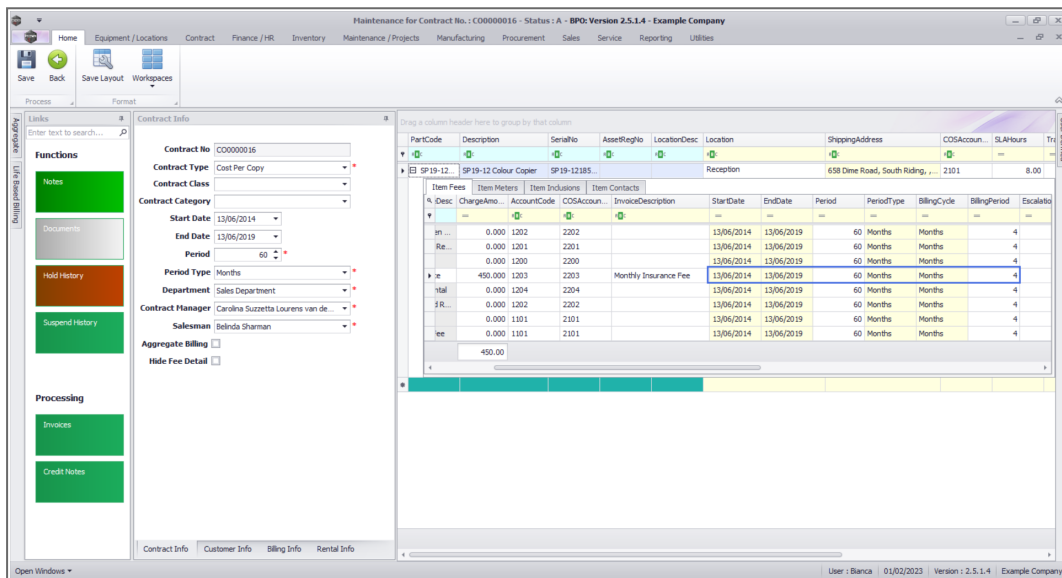


- **Scroll right** to view the remaining columns in this frame.

Billing Period Details

- **Start Date and End Date:** These will auto populate according to the contract start date and end date selected in the **Contract Info panel**. You can click on the drop-down arrow and use the calendar function to select an alternative start and end date if required.
- **Note:** Take note that the contract fee will only bill from the start date, and will stop billing at the end date.
- **Period & Period Type:** These fields will auto populate according to the contract start and end date recorded in the **Contract Info panel**. You can click on the text boxes and either type in or use the drop-down arrows to select an alternative period and period type if required.

- **Billing Cycle:** This will auto populate according to the contract billing cycle recorded in the **Billing Info panel**. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing cycle if required.
- **Billing Period:** This will auto populate according to the contract billing period recorded in the **Billing Info panel**. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative billing period if required.



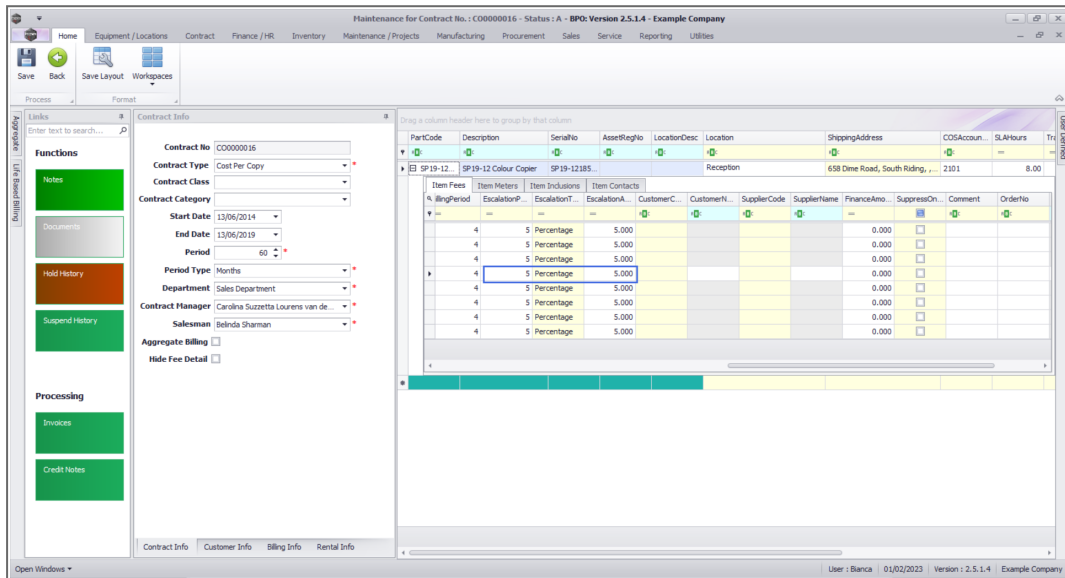
- **Scroll right** to view the remaining columns in this frame.

Escalation Details

- **Escalation Period:** This will auto populate according to the escalation period recorded in the **Billing Info panel**. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative escalation period if required.
- **Escalation Type:** This will auto populate according to the escalation type recorded in the **Billing Info panel**. You can click on the

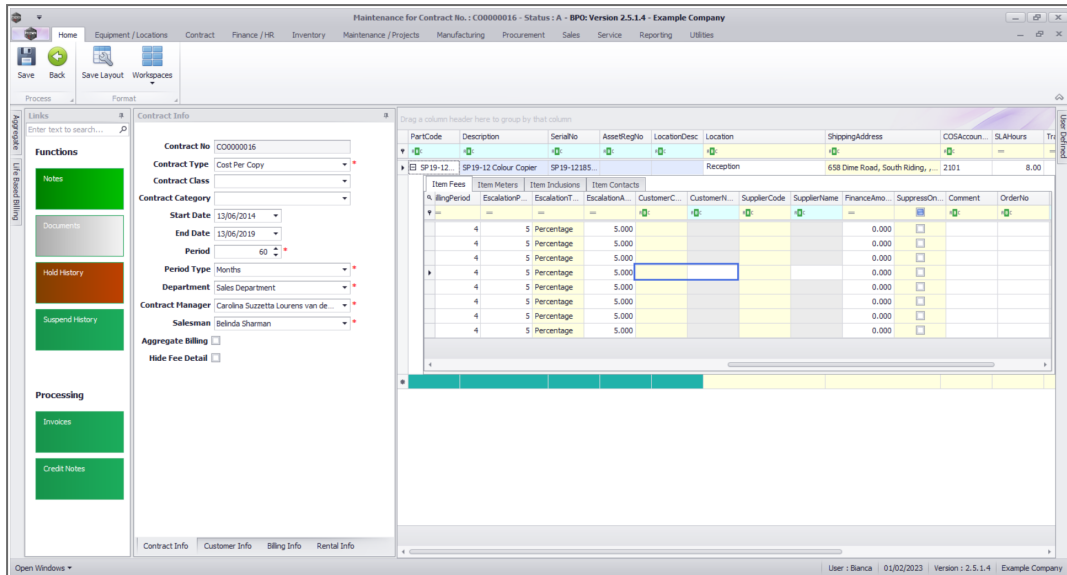
drop-down arrow in the text box to select an alternative escalation type if required.

- **Escalation Amount:** This will auto populate according to the escalation amount recorded in the **Billing Info panel**. You can click on the text box and either type in or use the arrow indicators to select an alternative escalation amount if required.

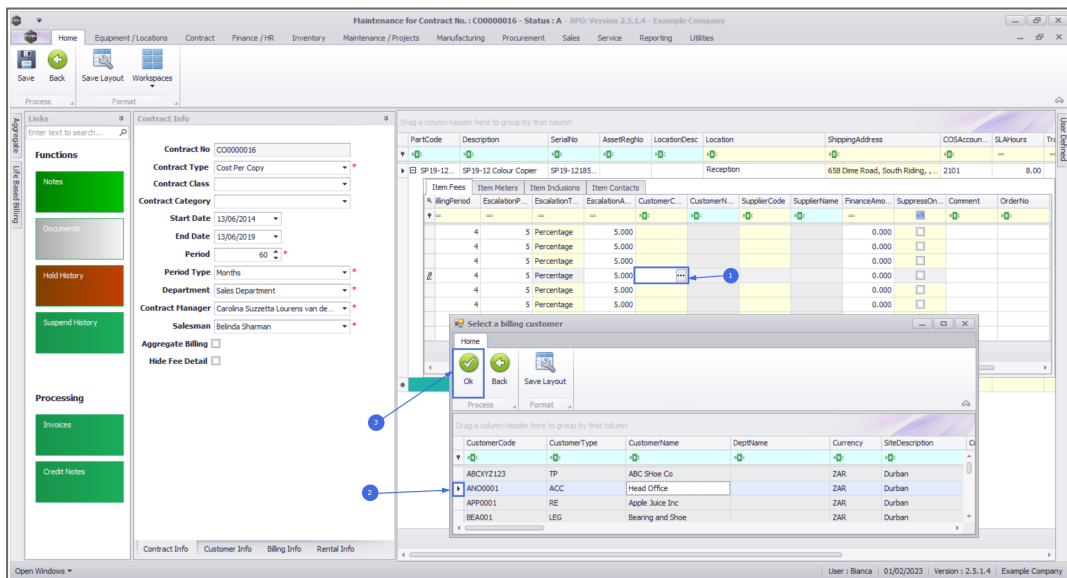


Billing Customer

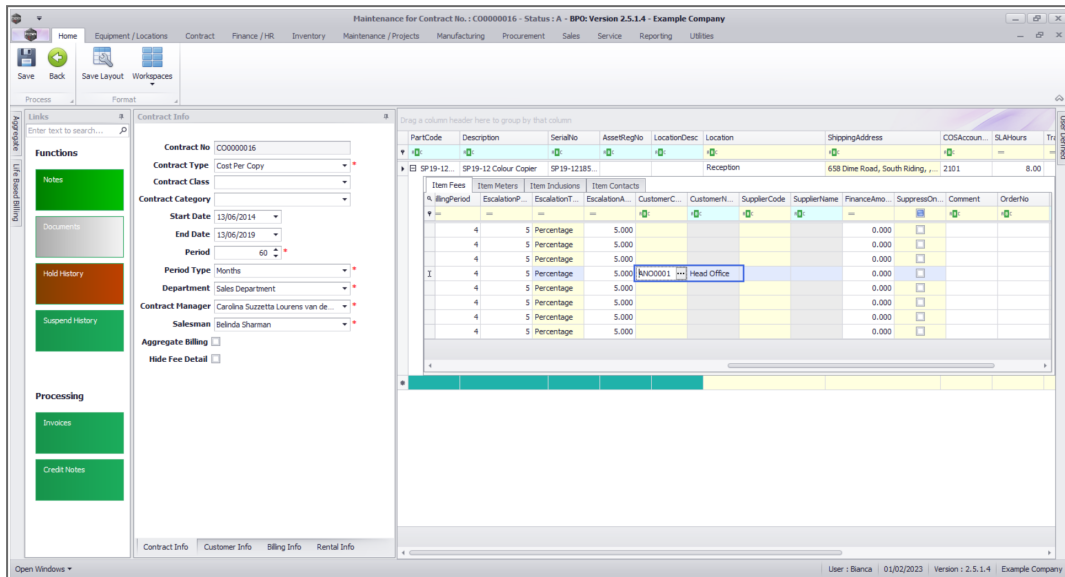
- Only populate these 2 fields if another party (a separate billing customer) is going to pay the **Item Fees** on behalf of the customer.
- If these fields are left blank, **BPO** will bill the customer linked to the contract.
 - **Note 1:** **BPO** only supports different billing customers on an aggregate contract from **BPO v2.3.0.4**.
 - **Note 2:** Follow the next 2 steps only if you wish to link another customer as the billing customer.



- Click in the **Customer Code** text box.
- An **Ellipsis** button will be revealed.
- Click on this button to display the **Select a billing customer** pop up screen.
- Click on the **row selector** in front of the **Billing customer** that you wish to **link** to this **contract**
- Click on **Ok**.

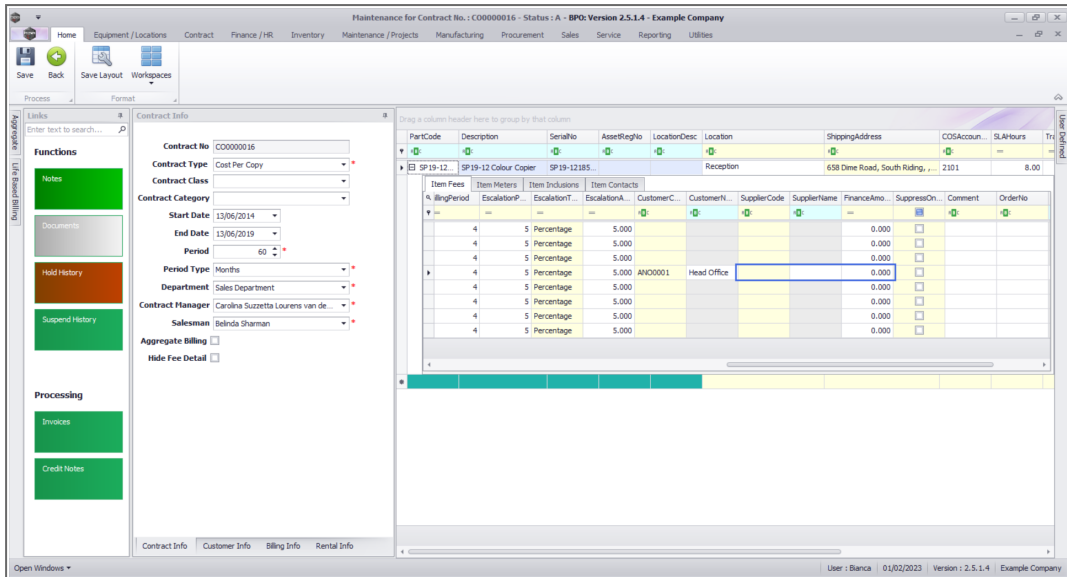


- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.

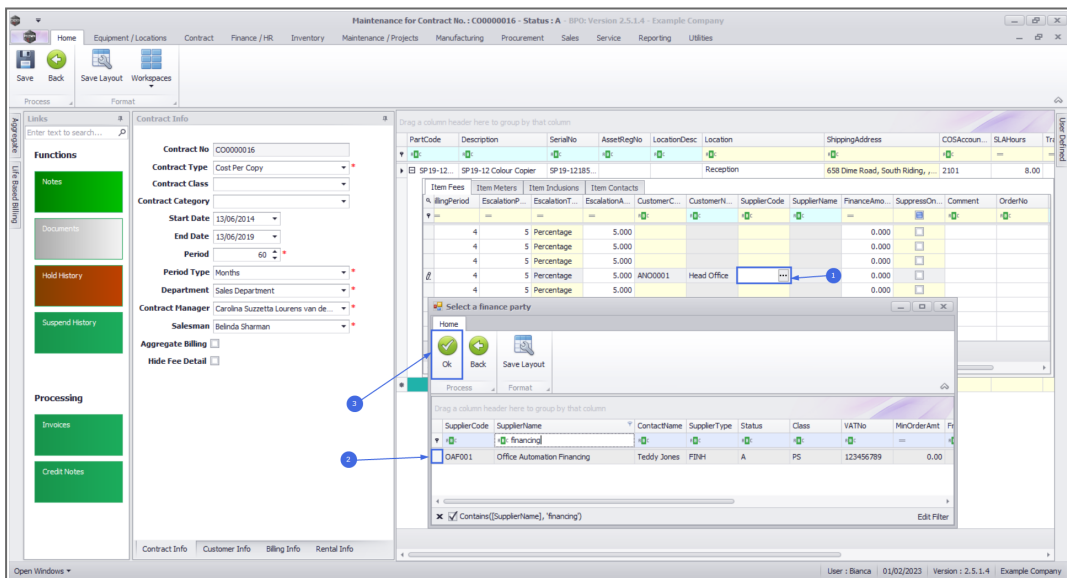


Back to Back / Finance Details

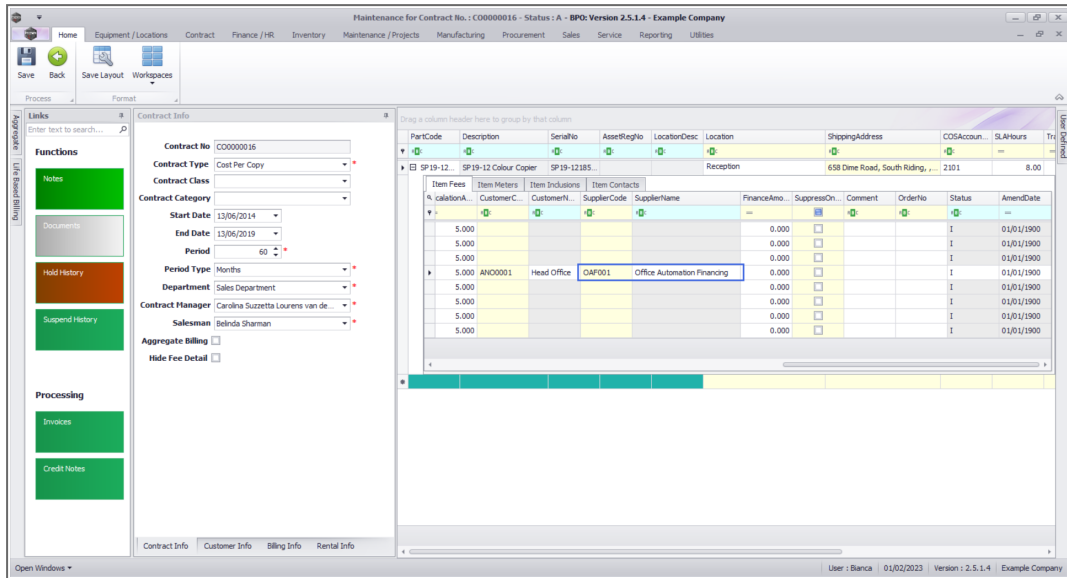
- These fields should only be populated if there is a **Back to Back Deal** with a third party who is set up on **BPO** as a **Supplier**.
- Follow the next 2 images only if you wish to link a supplier for rental back-to-backs (finance house bills company & company bills client).



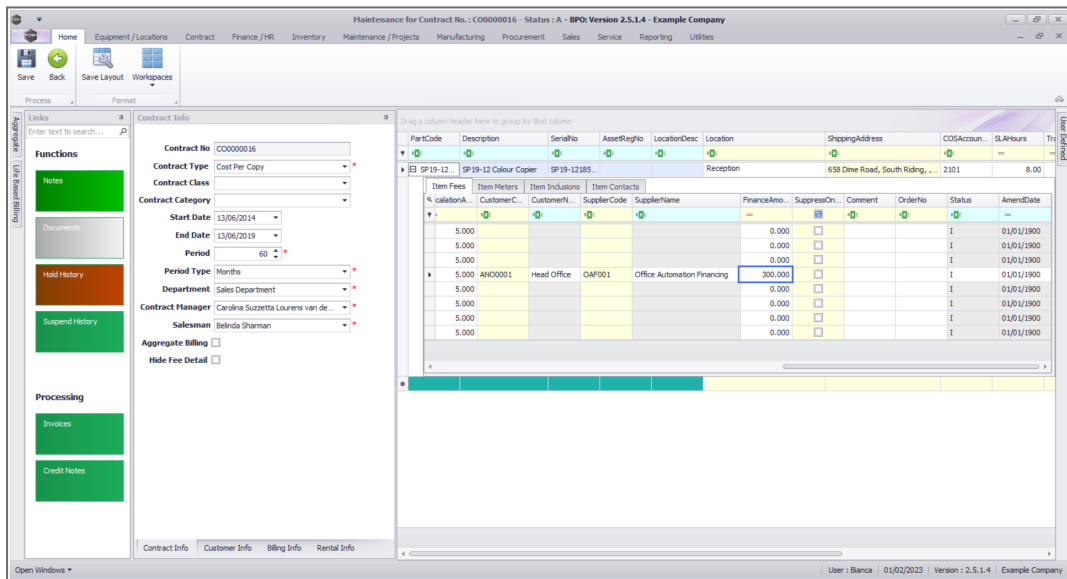
- Click on the **Supplier Code** text box to reveal an **Ellipsis** button.
- Click on this button to display the **Select a finance party** pop up screen.
- Click on the **row selector** in front of the **Supplier** that you wish to **link** to this item.
- Click on **Ok**.



- **Supplier Name:** This will auto populate once the supplier code has been selected.

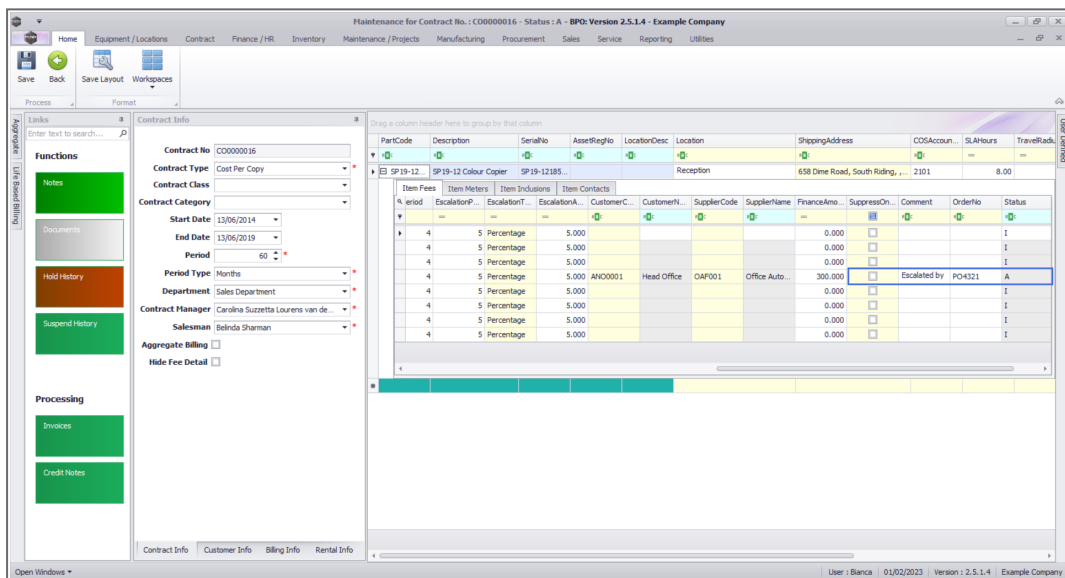


- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



Additional Details

- **Suppress on Invoice:** Only select this if you wish to hide the item fee information on the invoice.
- **Comment:** Click in this text box and type in a comment regarding this contract fee, if required.
- **Order No:** Type in a customer order number relevant to this item, if required. This will be displayed on the contract invoice.
- **Status:** This field will be set to **A** (Active) once the fee has been saved, and is static.
- **Amend Date:** This shows the date the item was last modified and the field is static.
- The 'Add an Item Fee' process is now complete.

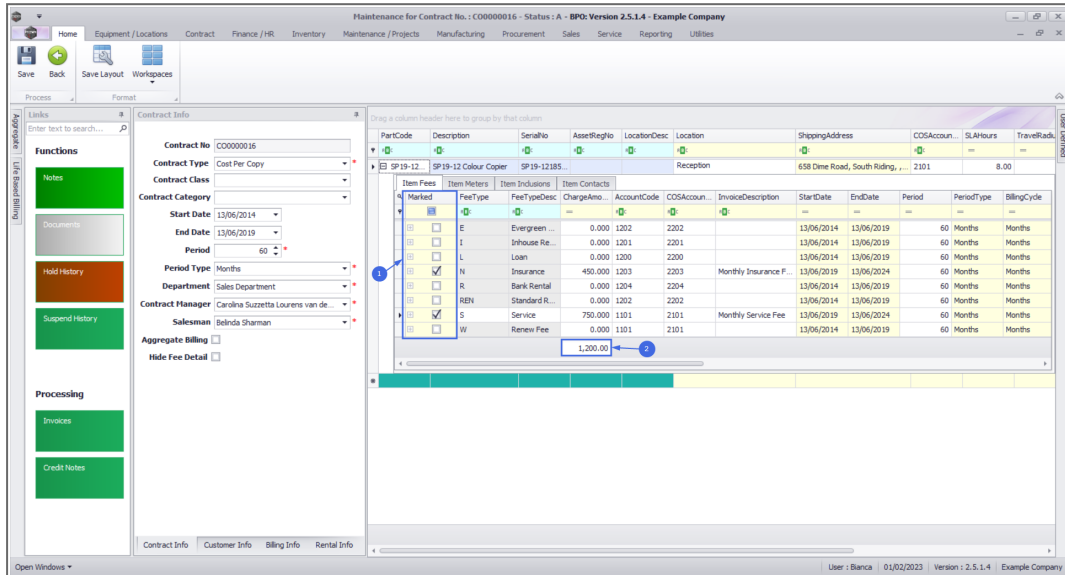


Additional Item Fees

1. Scroll back to the **Marked** column.

- You can now set up **additional fees** by following the **above process**, if required, before moving on to the next frame.

2. This shows the total amount of all **Item Fees** charged on the contract item.



Item Meters

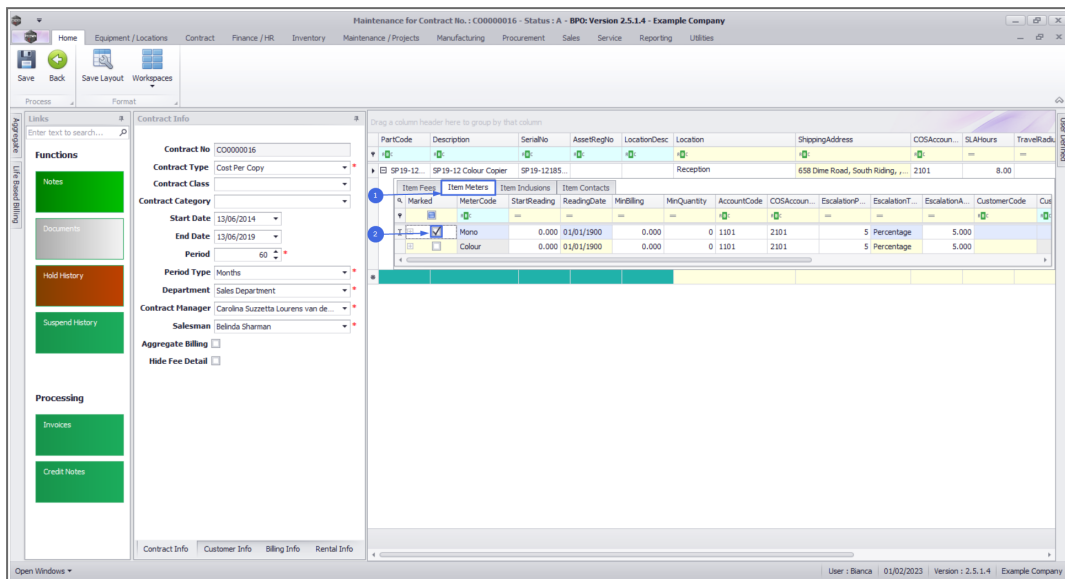
Meters charges can only be configured on Machine Items (assets).

The meter types available for selection are dependant on the meters configured for the selected **contract type**, and where the relevant **meters are linked to the selected asset**.

Helpful Hint:

To avoid linking meter definitions to items every time you want to add items on a contract, **link meters to the part codes** of the items. This way, when new items are received / adjusted into stores, they will already have meters linked to them. This will not apply to items that are already in stores prior to this step.

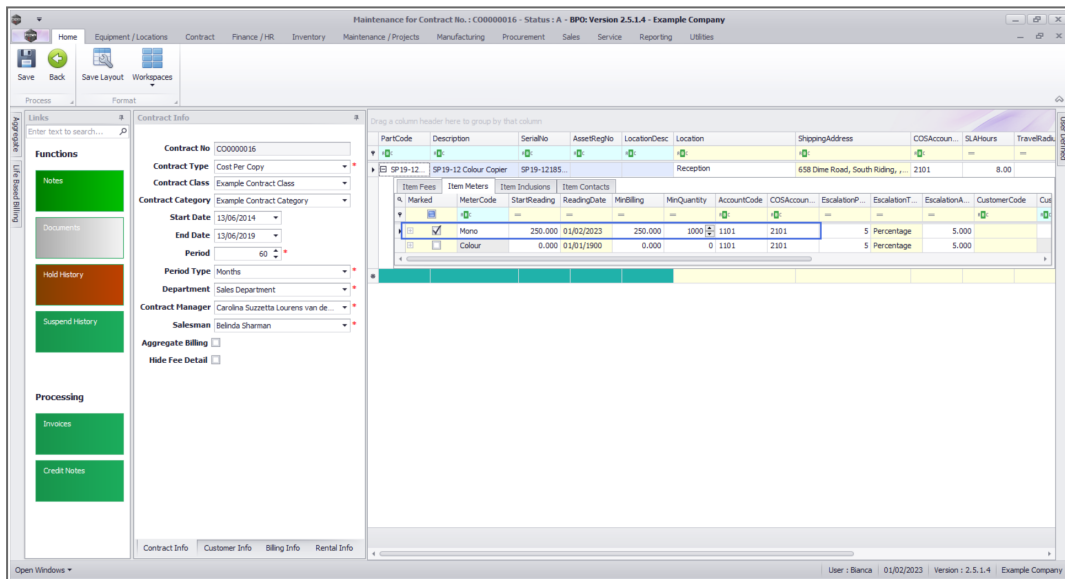
- Click on the **Item Meters** tab.
- **Marked:** Click on the check box in front of the name of the Meter to be billed on this contract.



Meter Header and Minimum Billing Details

- **Start Reading:** Type in the start reading of the meter. This will be the reading taken from the contract item at the point of installation
- **Reading Date:** Click in this text box to display the calendar function, use this to select the reading date that corresponds to the Start Reading.
- **Min Billing:** Type in the minimum billing amount (in Rand value).
 - Minimum billing is a fixed charge; charged on copies up to and including the Minimum Quantity. For example, a minimum billing fee of R250 for a minimum quantity of 1000 copies means R250 will be charged for any number of copies made from the first copy up to and including 1000.

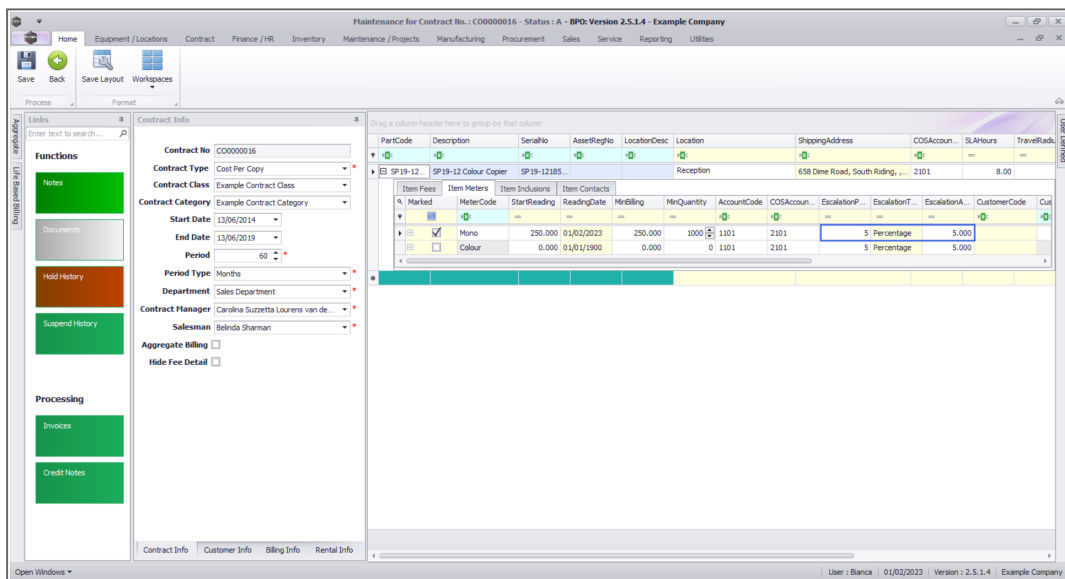
- If no minimum billing should be applied, leave the MinBilling and MinQuantity fields as 0.
- For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#)
- **Min Quantity:** Type in the minimum quantity (the copies that are included in the minimum billing amount).
- **Account Code:** This will auto populate with the Sales GL Account code set on the meter as [configured](#) for the contract type. This code can be changed if required, but ensure a valid general ledger code is used.
- **COS Account Code:** This will auto populate with the Sales GL Account code set on the meter as [configured](#) for the contract type. This code can be changed if required, but ensure a valid general ledger code is used.



- **Scroll right** to view the remaining columns in this frame.

Escalation Details

- **Escalation Period:** This will auto populate according to the escalation period recorded in the **Billing Info panel**. You can click on the text boxes and either type in or use the drop-down arrow to select an alternative escalation period if required.
- **Escalation Type:** This will auto populate according to the escalation type recorded in the **Billing Info panel**. You can click on the drop-down arrow in the text box to select an alternative escalation type if required.
- **Escalation Amount:** This will auto populate according to the escalation amount recorded in the **Billing Info panel**. You can click on the text box and either type in or use the arrow indicators to select an alternative escalation amount if required.

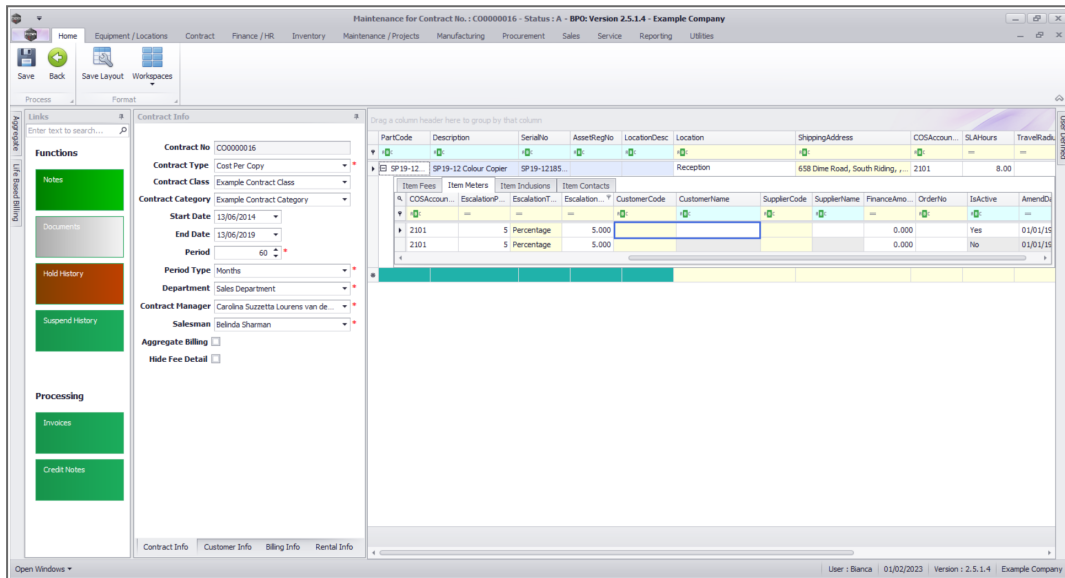


Billing Customer

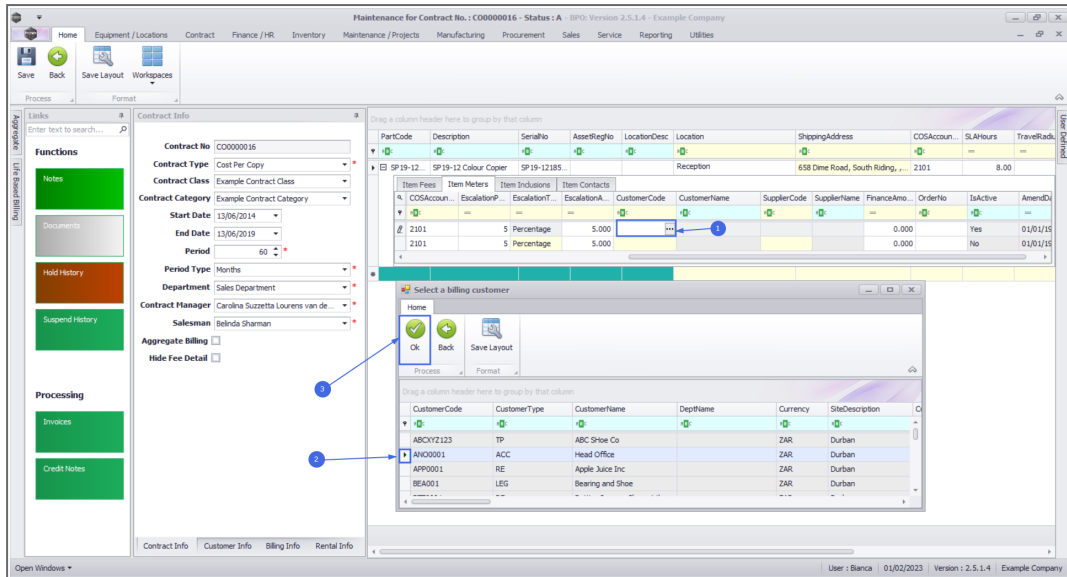
- Only populate these 2 fields if another party (a separate billing customer) is going to pay the **Item Fees** on behalf of the

customer.

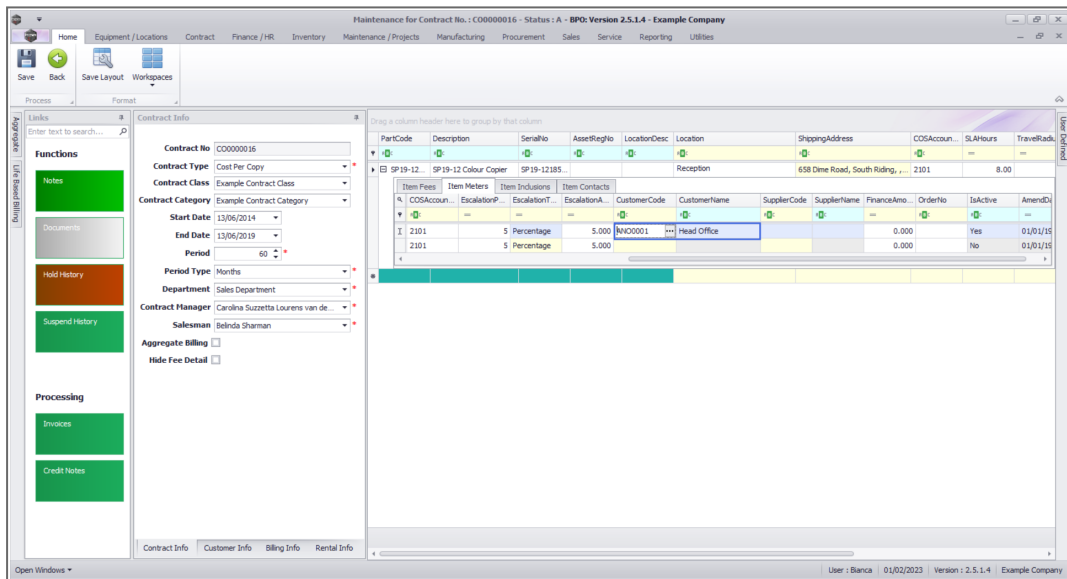
- If these fields are left blank, **BPO** will bill the customer linked to the contract.
 - **Note 1: BPO** only supports different billing customers on an aggregate contract from **BPO v2.3.0.4**.
 - **Note 2:** Follow the next 2 steps only if you wish to link another customer as the billing customer.



- Click in the **Customer Code** text box.
- An **Ellipsis** button will be revealed.
- Click on this button to display the **Select a billing customer** pop up screen.
- Click on the **row selector** in front of the **Billing customer** that you wish to **link** to this **contract**
- Click on **Ok**.

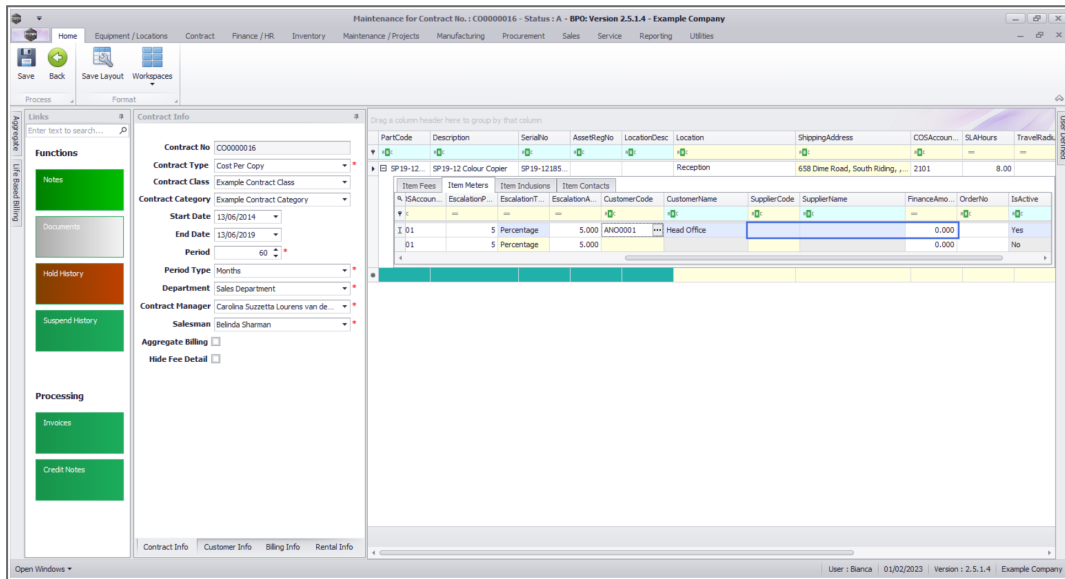


- **Customer Name:** Once you have selected the customer code, the customer name will auto populate with the customer name linked to that code on the system.

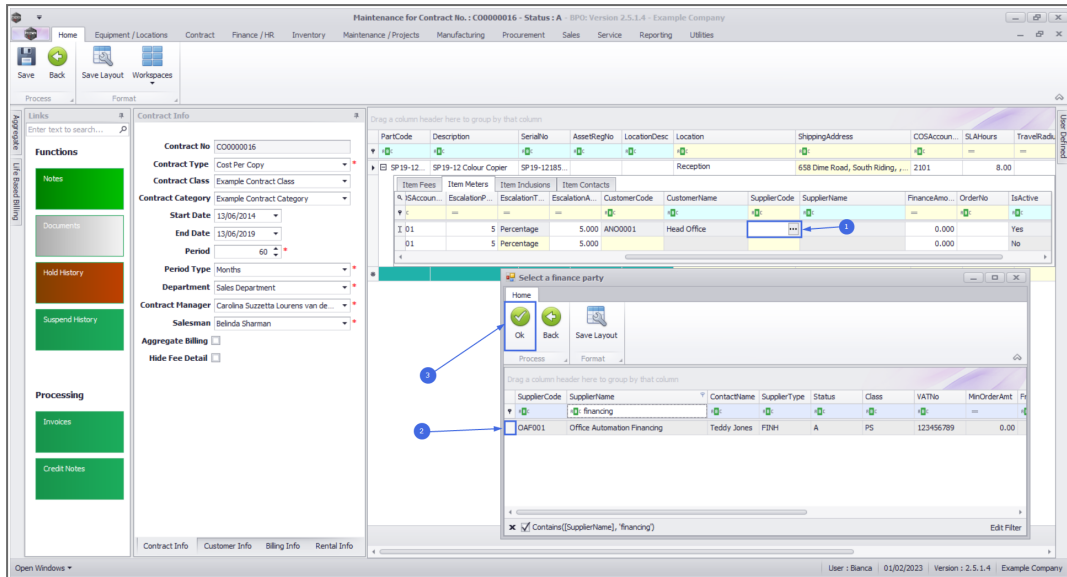


Back to Back / Finance Details

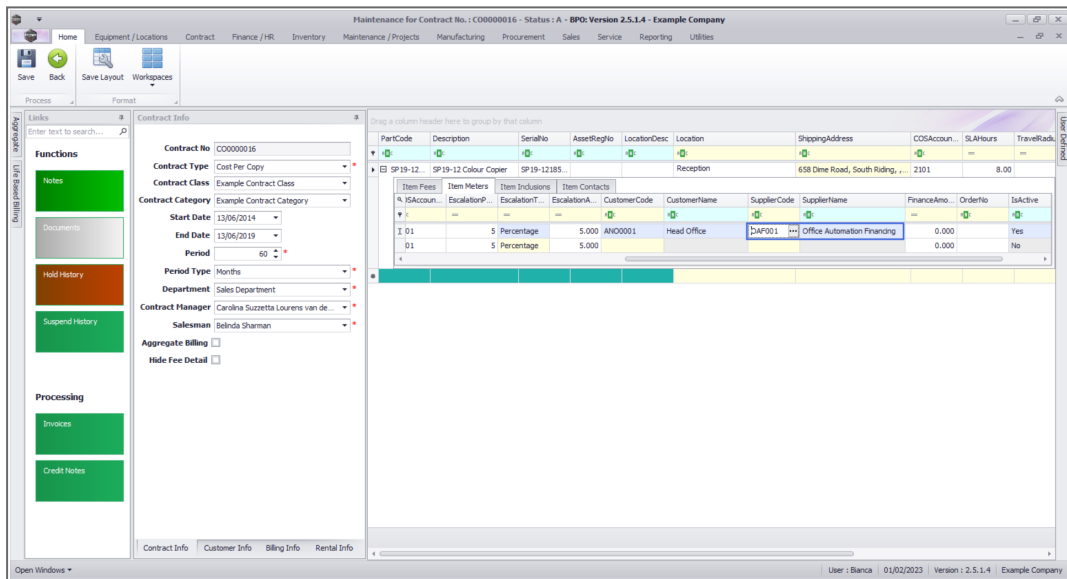
- These fields should only be populated if there is a **Back to Back Deal** with a third party who is set up on **BPO** as a **Supplier**.
- Follow the next 2 images only if you wish to link a supplier for rental back-to-backs (finance house bills company & company bills client).



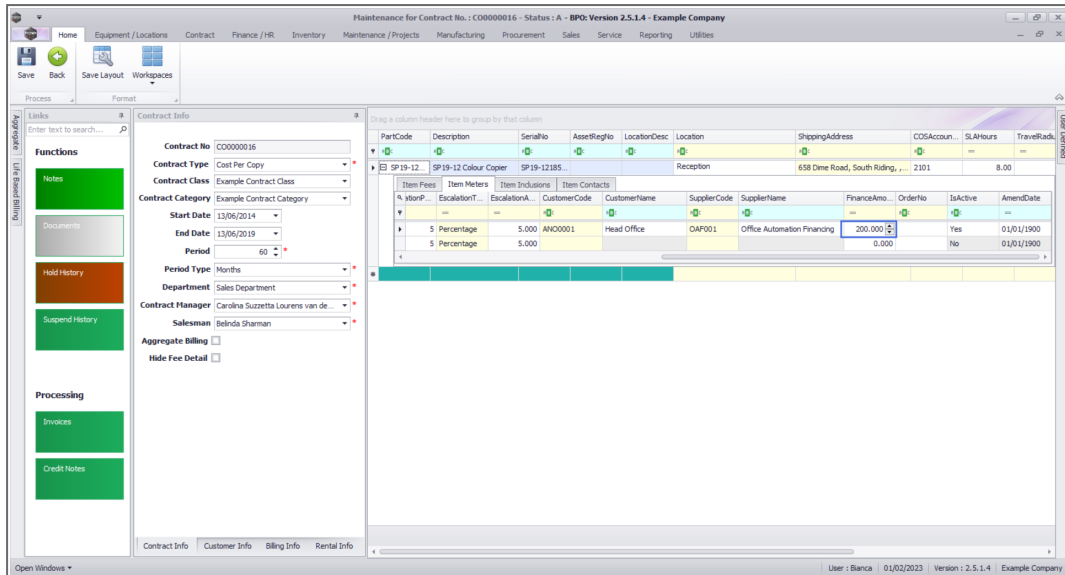
- Click on the **Supplier Code** text box to reveal an **Ellipsis** button.
- Click on this button to display the **Select a finance party** pop up screen.
- Click on the **row selector** in front of the **Supplier** that you wish to **link** to this **item**.
- Click on **Ok**.



- **Supplier Name:** This will auto populate once the supplier code has been selected.

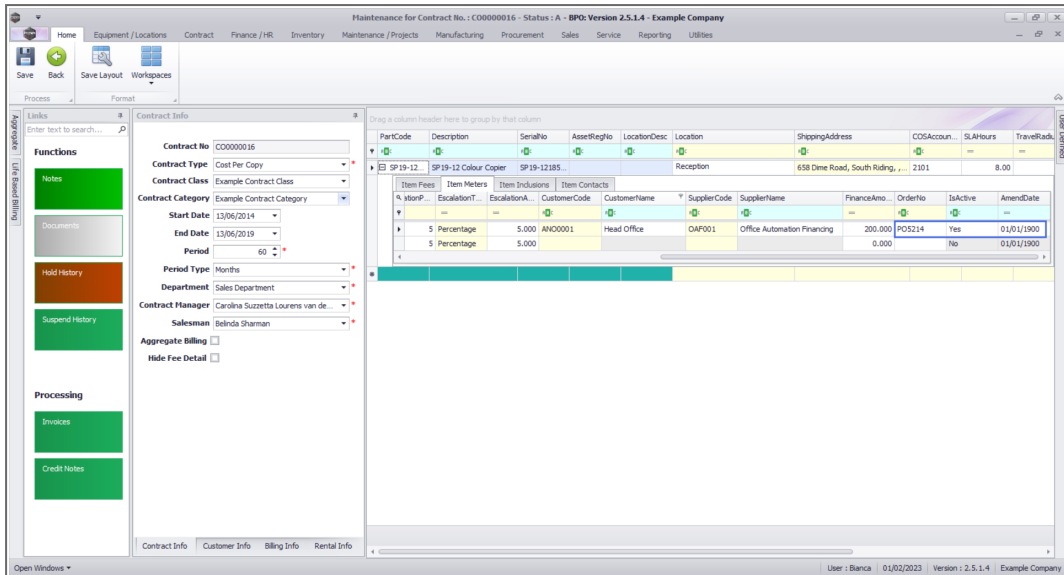


- **Finance Amount:** Click in this text box and either type in or use the arrow indicators to select the finance amount.



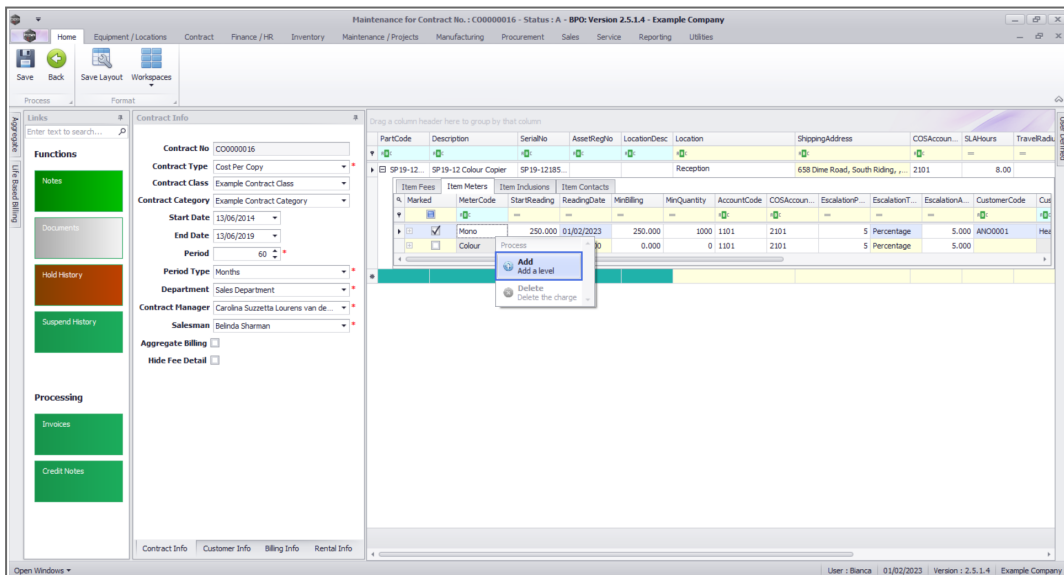
Additional Details

- **Order No:** Type in a customer order number relevant to this item, if required. This will be displayed on the contract invoice.
- **Status:** This field will be set to **A** (Active) once the fee has been saved, and is static.
- **Amend Date:** This shows the date the item was last modified and the field is static.



Add Meter Levels

- **Scroll left** to return to the **Marked** column.
- **Right click** in the **row** of the 'active' item you wish to **add a meter level** to.
 - In this image the **Mono** meter has been selected.
- A **Process** menu will pop up.
- Click on **Add** - Add a level.

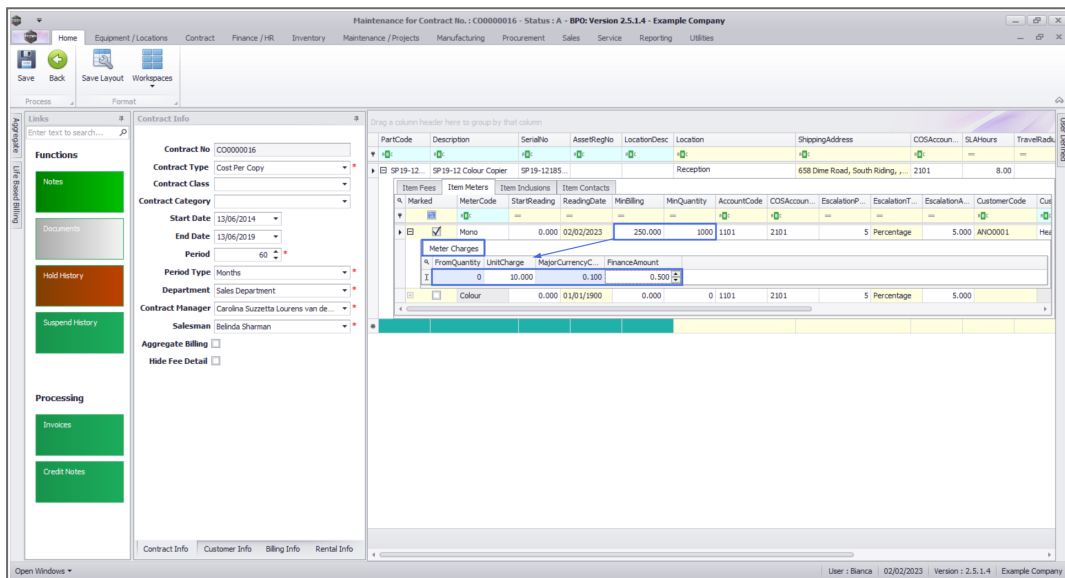


Add Meter Levels – For A Meter with Minimum Billing

- The **Meter Charges** frame will be expanded.
 1. In this image, the mono meter has a minimum billing set up of a R250 charge for the first 1000 copies (**Minimum Quantity**). **BPO** calculates the usage charges by first calculating the minimum billing set up. In this example, it means in **BPO**, a fixed charge of R250 will be applied for any number of mono copies made on this contract item the first copy up to and including 1 000 thereafter a unit charge per copy will be applied i.e from 1001.
 2. **From Quantity:** This is the number from which the unit charge will be effective.
 - The first row in the **Meter Charges** matrix, is static at 0. This means if there is minimum billing set up on the meter, the **first** row looks incorrect as the **From Quantity** field is static at 0.
 - If there is minimum billing set up on the meter, **BPO** does not read the **From Quantity** in the first row as 0 (although it displays as 0) but starts counting from (**Minimum Quantity + 1**). In this case, since (minimum billing level) is up to and including 1000, **BPO** will start counting from 1001.
 - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).
 3. **Major Currency Charge:** (only viewable for [standard meter](#) set up) Once the Unit Charge has been input as

cents, the Major Currency Charge will automatically round the value to two decimal places.

4. **Unit Charge:** Type in the unit charge for the meter (charge per copy) - this needs to be input as the cents value.
5. **Finance Amount:** This should only be populated if there is a Back to Back Deal with a third party who is set up in **BPO** as **Supplier**.



Add Meter Levels – For A Meter with No Minimum Billing

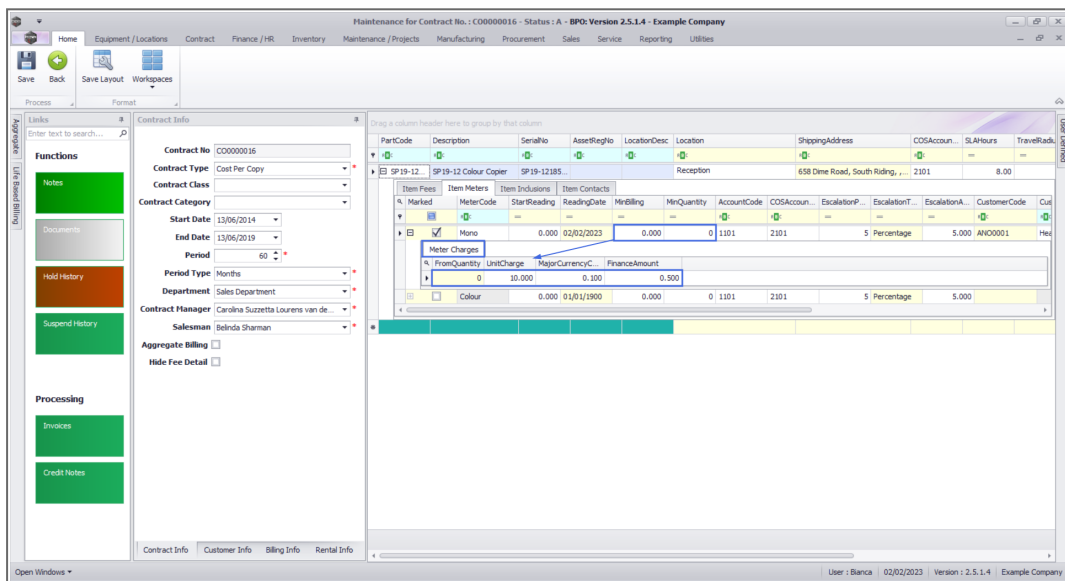
- The **Meter Charges** frame will be expanded.
 - **Note:** The **Colour** meter will be used as an example.
 1. There is no minimum billing set up on this meter. This means the usage calculation will only be based on what's set up in the Meter Charges matrix.
 2. **From Quantity:** This is the number from which the unit charge will be effective.

- The first row in the Meter Charges matrix, is static at 0.
 - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).
3. **Finance Amount:** This should only be populated if there is a Back to Back Deal with a third party who is set up in **BPO** as a **Supplier**.
 4. **Major Currency Charge:** Once the Unit Charge has been input as cents, the Major Currency Charge will automatically round the value to two decimal places.
 5. **Unit Charge:** Type in or use the arrow indicators to select the unit charge for this additional meter (charge per copy) - this needs to be input as the cents value. This charge will usually increase with each new level.

Add Meter Levels – For A Meter with No Minimum Billing

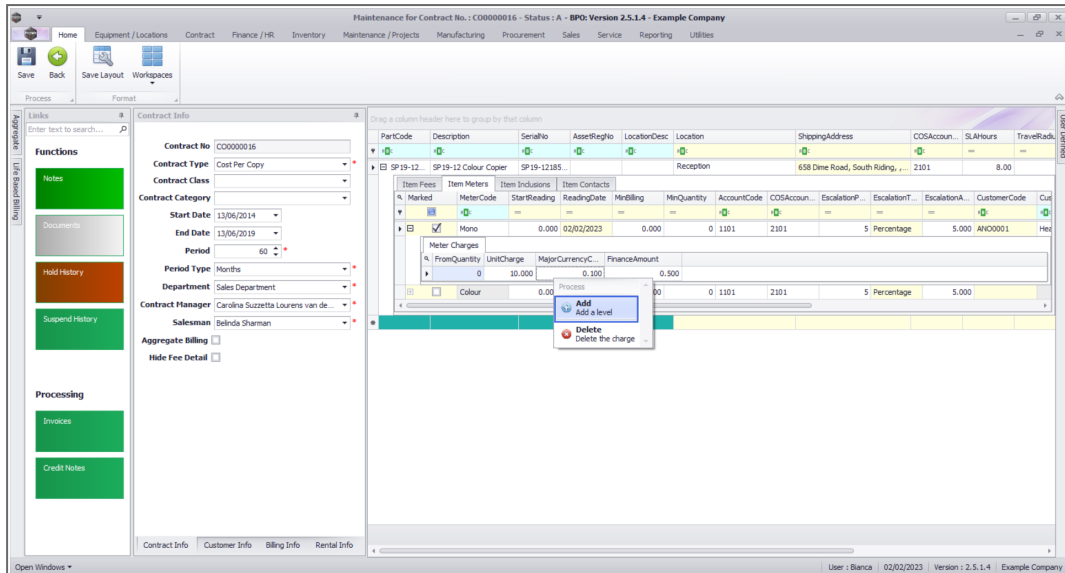
- The **Meter Charges** frame will be expanded.
 - **Note:** The **Colour** meter will be used as an example.
- 1. There is no minimum billing set up on this meter. This means the usage calculation will only be based on what's set up in the Meter Charges matrix.
- 2. **From Quantity:** This is the number from which the unit charge will be effective.
 - The first row in the Meter Charges matrix, is static at 0.
 - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).

3. **Finance Amount:** This should only be populated if there is a Back to Back Deal with a third party who is set up in **BPO** as a **Supplier**.
4. **Major Currency Charge:** Once the Unit Charge has been input as cents, the Major Currency Charge will automatically round the value to two decimal places.
5. **Unit Charge:** Type in or use the arrow indicators to select the unit charge for this additional meter (charge per copy) - this needs to be input as the cents value. This charge will usually increase with each new level.

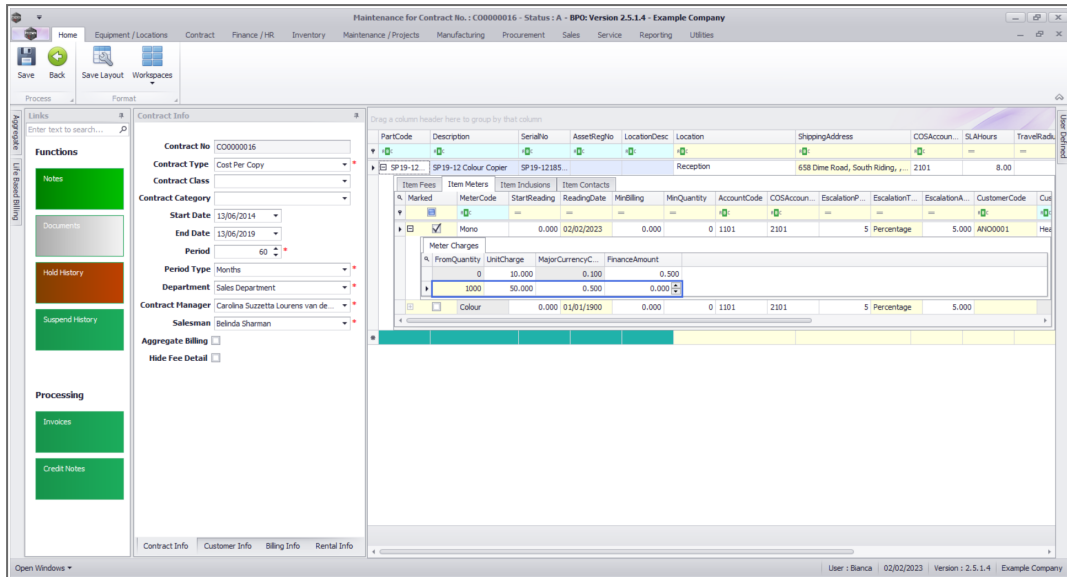


Add an Additional Charge Level

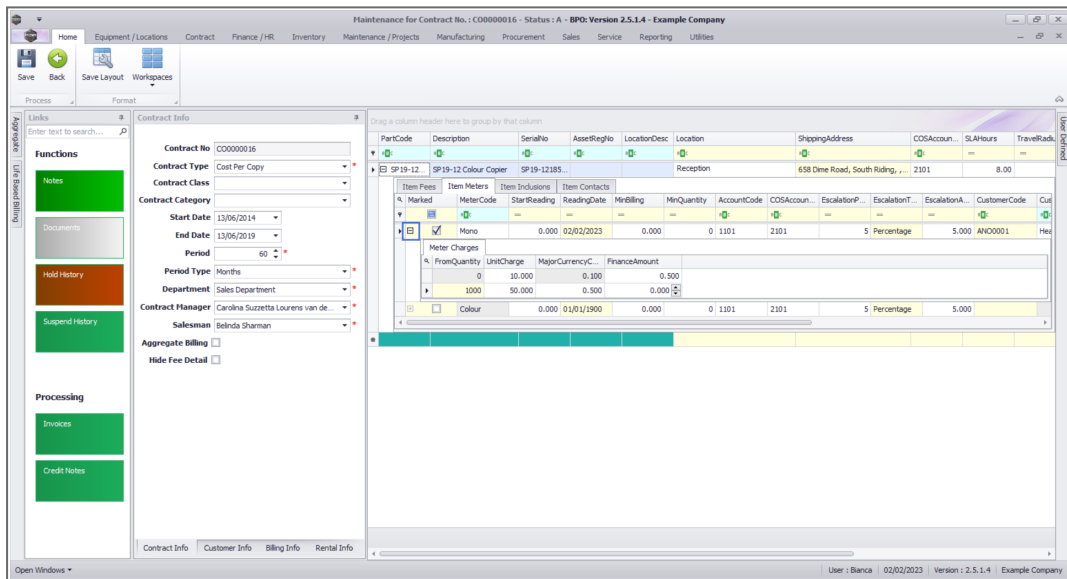
- **Right click** anywhere in the **row** of the **item** that you wish to add **another meter level** to. (You can do this whilst the meter charges matrix is open or closed).
- The **Process** menu will pop up again.
- Click on **Add** - Add a level.



- A **second level** has now been added to the **Meter Charges** matrix.
 - **From Quantity:** Type in or use the arrow indicators to select the number of copies from which this charge will be effective.
 - For a more detailed explanation, read this [important note on Minimum Billing and Meter Charge Setup](#).
 - **Finance Amount:** This should only be populated if there is a Back to Back Deal with a third party who is set up in **BPO** as a **Supplier**.
 - **Unit Charge:** Type in or use the arrow indicators to select the unit charge for this additional meter (charge per copy). This charge will usually increase with each new level.
 - Repeat this process to add more meter charges as required.



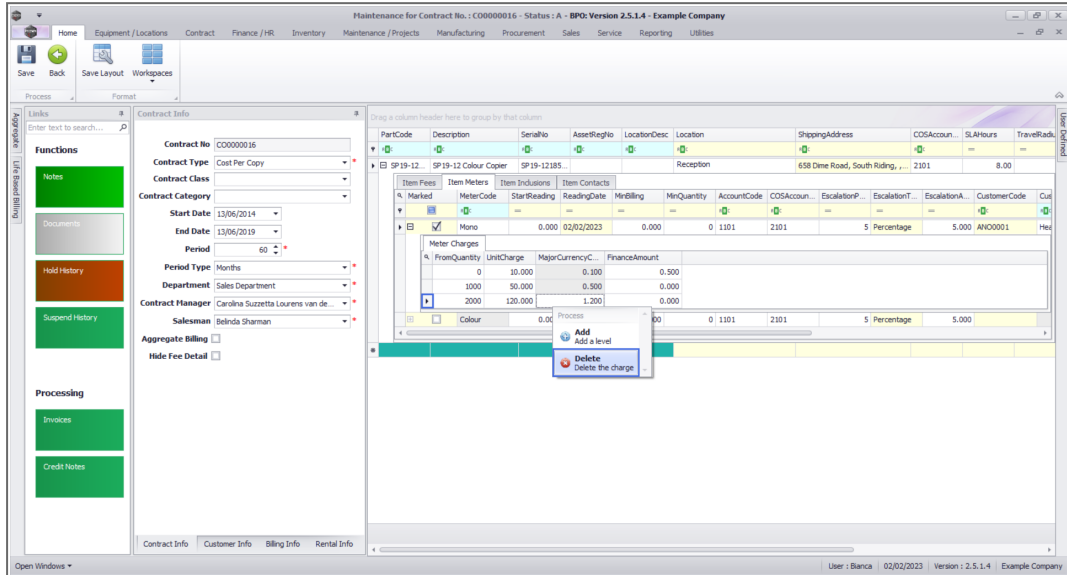
- When you have finished working in the **Meter Charge Levels**, click on the **Hide** button to **close** the sub grid.



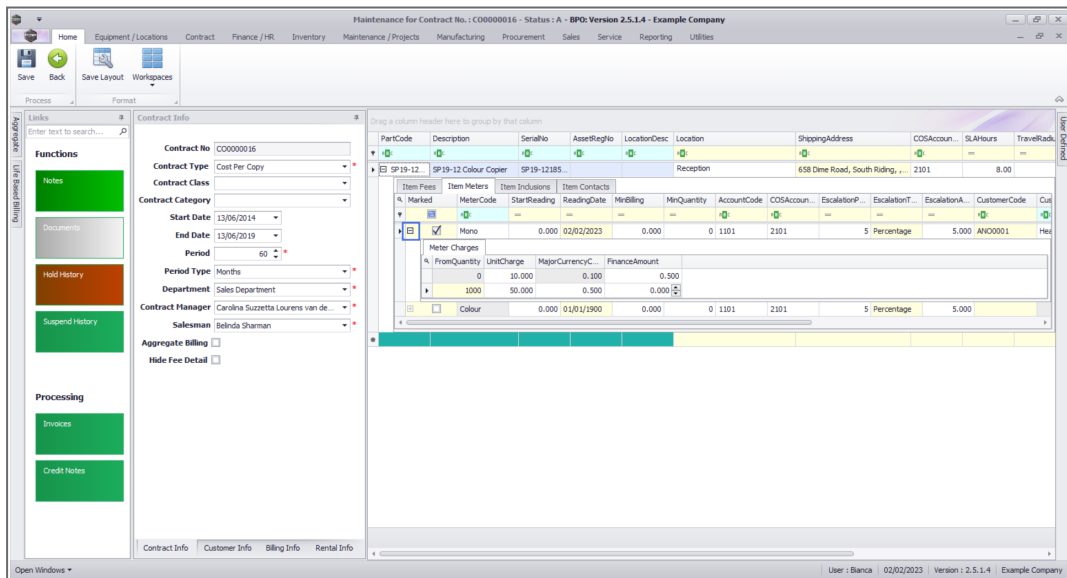
Delete A Meter Level

- The final option in the **Add Meter Level Process** menu is **Delete the Charge**.

- **Right click** in the **row** of the **meter level** that you wish to **delete** from the meter.
- The **Process** menu will pop up.
- Click on **Delete** - Delete the Charge.



- The selected meter level will now be **removed** from the **Meter Charges** matrix.
- Click on the **Hide** button to close the **Meter Charges** matrix.

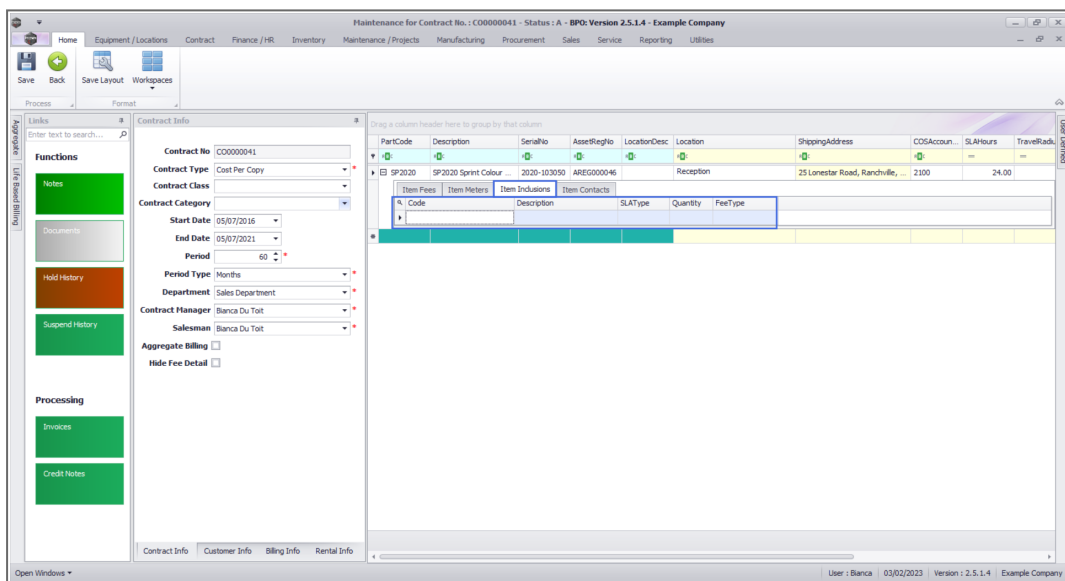


Item Inclusions Frame

- Click on the **Item Inclusions** tab.

The **Item Inclusions** frame will be expanded.

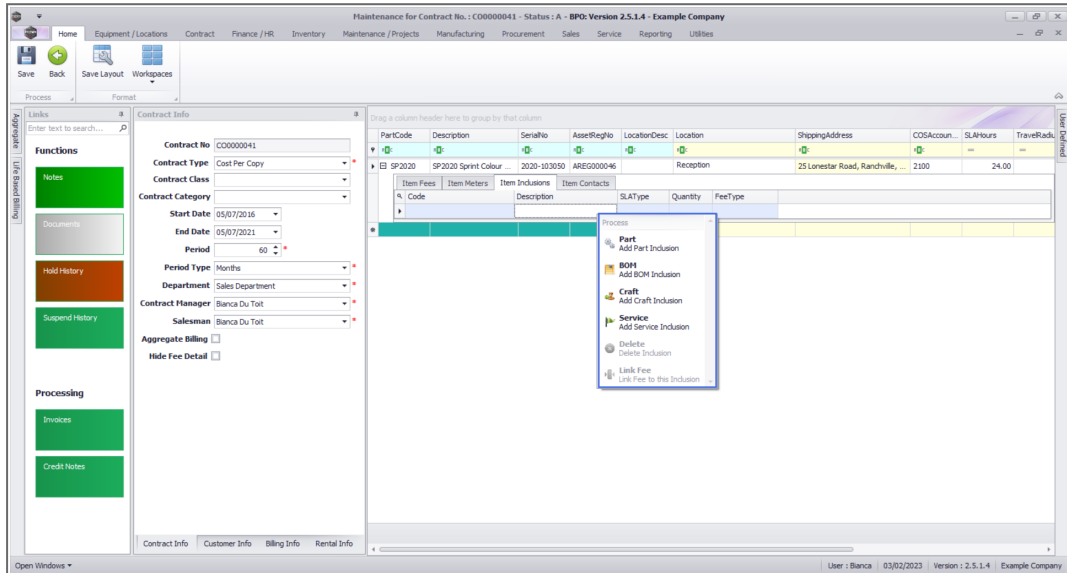
- In the **Item Inclusions** frame, you can add all **.png Inclusions** (items which are included in the .png and not billed separately).
- These are tasks, items, actions, services, etc. that are specifically “included” in the .png and are covered by a set .png fee agreed between the customer and service provider.
- Although they are included, you can have a breakdown of each individual inclusion. This breakdown is achieved by utilising the **Link Fee** panel within the Item Inclusion panel. For more information, refer to the **Link Fee** topic.



Add Item Inclusions

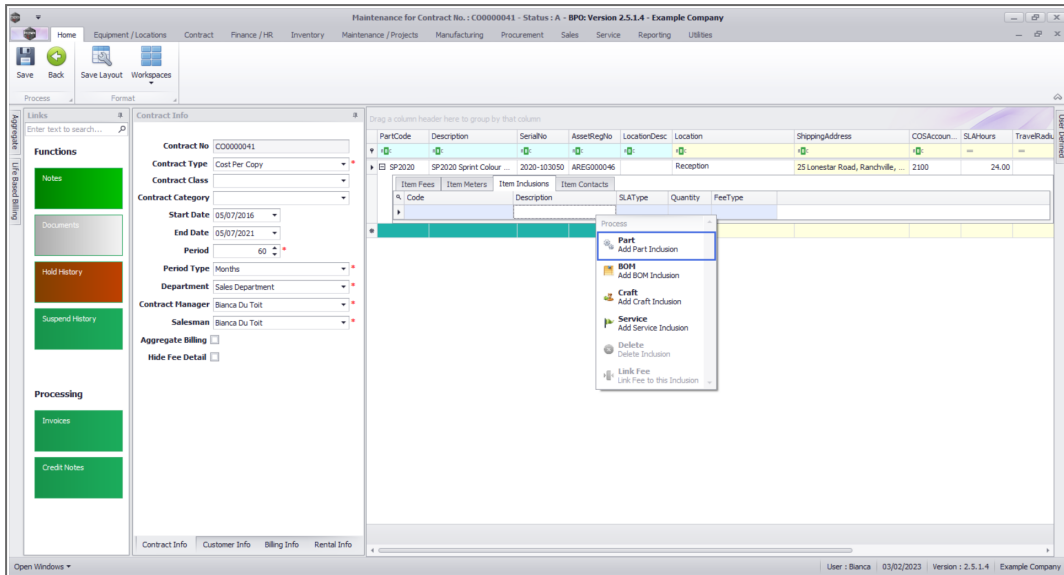
- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- A **Process** menu will pop up with the following options:

- **Part:**[Add Part Inclusion](#)
- **BOM:**[Add Bill Of Materials Inclusion](#)
- **Craft:**[Add Craft Inclusion](#)
- **Service:**[Add Service Inclusion](#)
- **Link Fee:**[Link A Fee To An Inclusion](#)
- **Delete:**[Delete Inclusion](#)

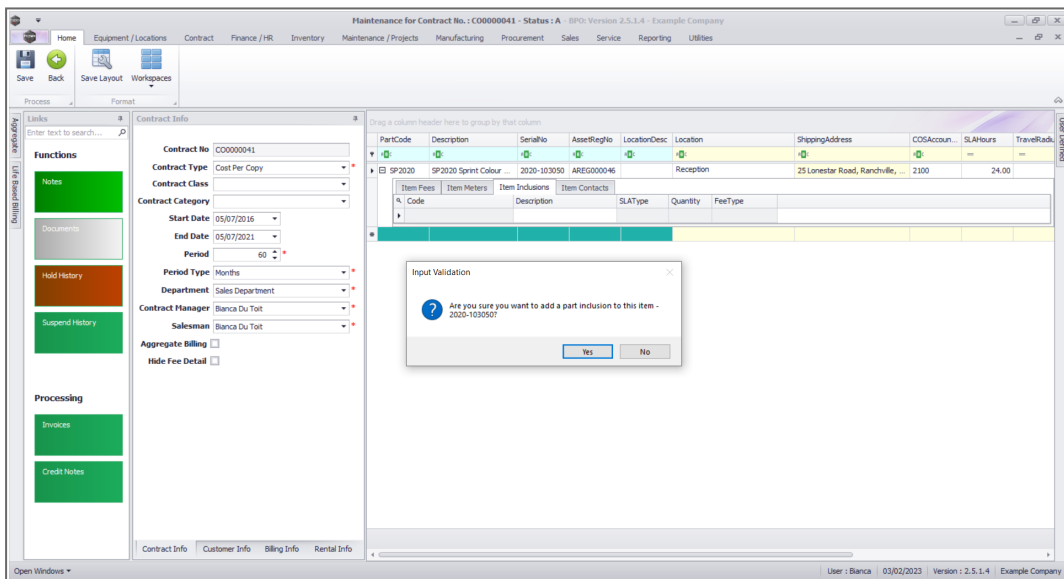


Add Part Inclusion

- Click on **Part** - Add Part Inclusion.



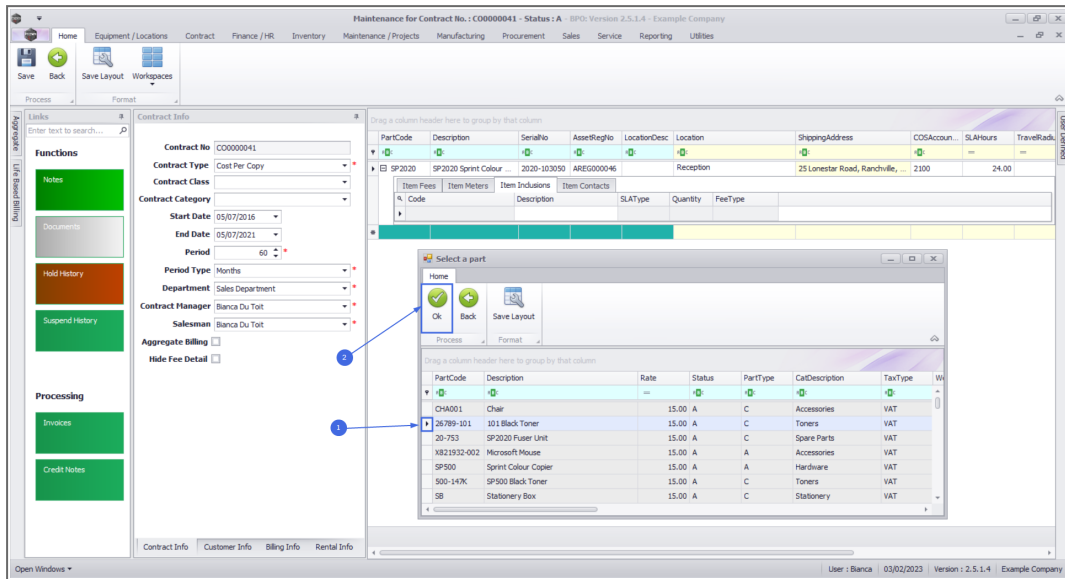
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a part inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



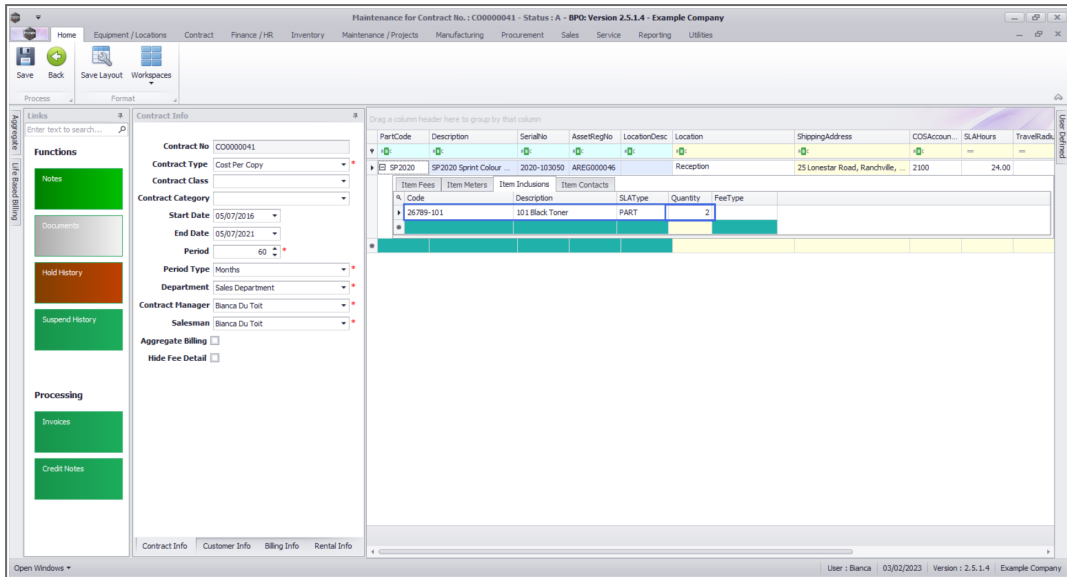
- A **Select a part** screen will pop up.
- Click on the **row selector** in front of the **part** you wish to **add** to

this .png as an **inclusion**

- Click on **Ok**.

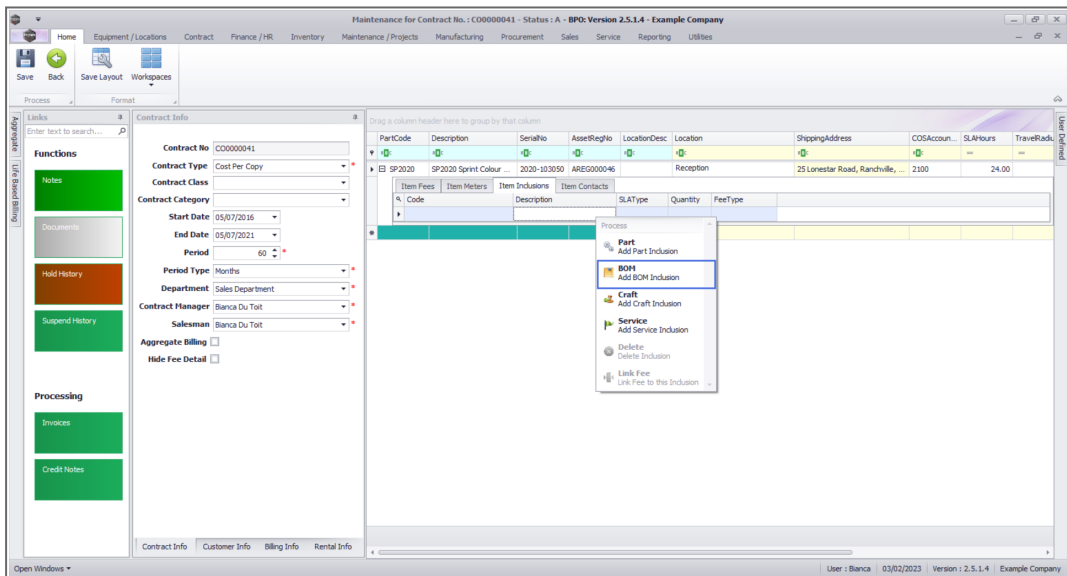


- The selected part will be **added** to the **Item Inclusion** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the SLA type of the selected item.
 - **Quantity:** Type in the quantity included for the selected part.
 - **Fee Type:** This field will only be populated if you **link a fee** to the inclusion.

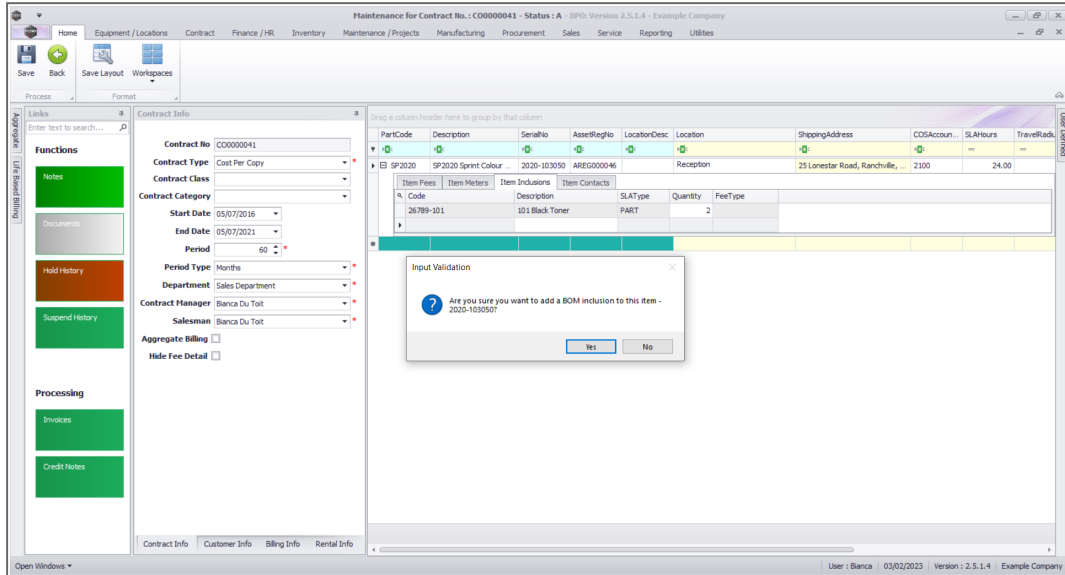


Add Bill of Materials Inclusion

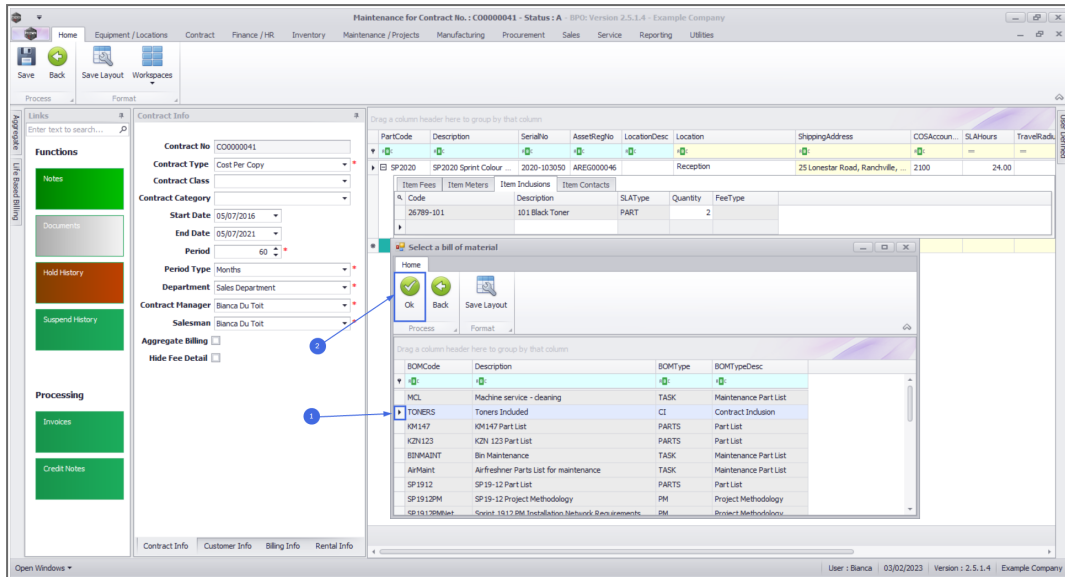
- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **BOM** - Add BOM Inclusion.



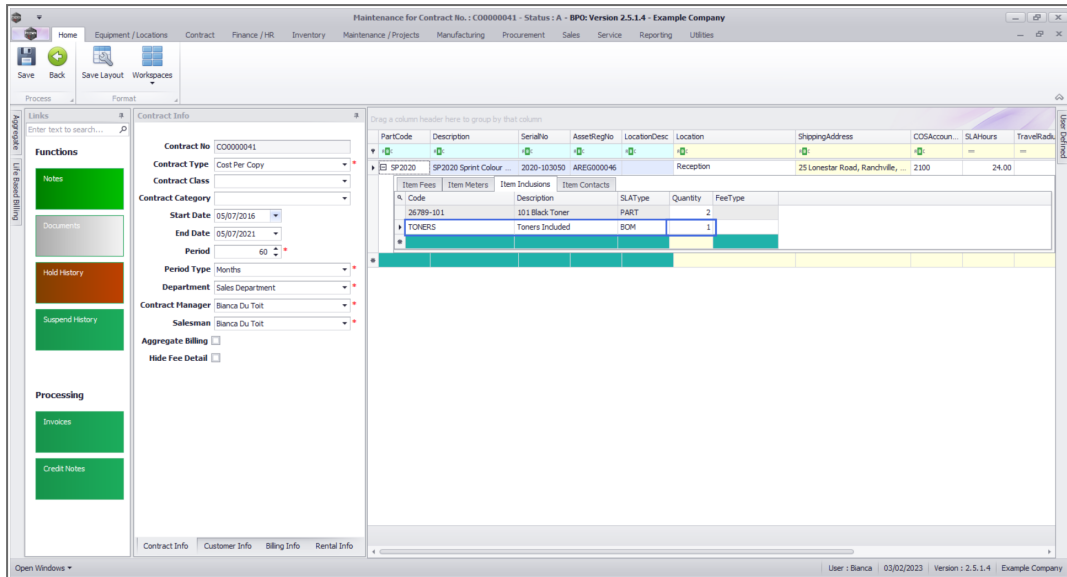
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a BOM inclusion to this item - [Serial Number or Location Description]??**
- Click on **Yes**.



- A **Select a bill of material** screen will pop up.
- Click on the **row selector** in front of the **BOM** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.

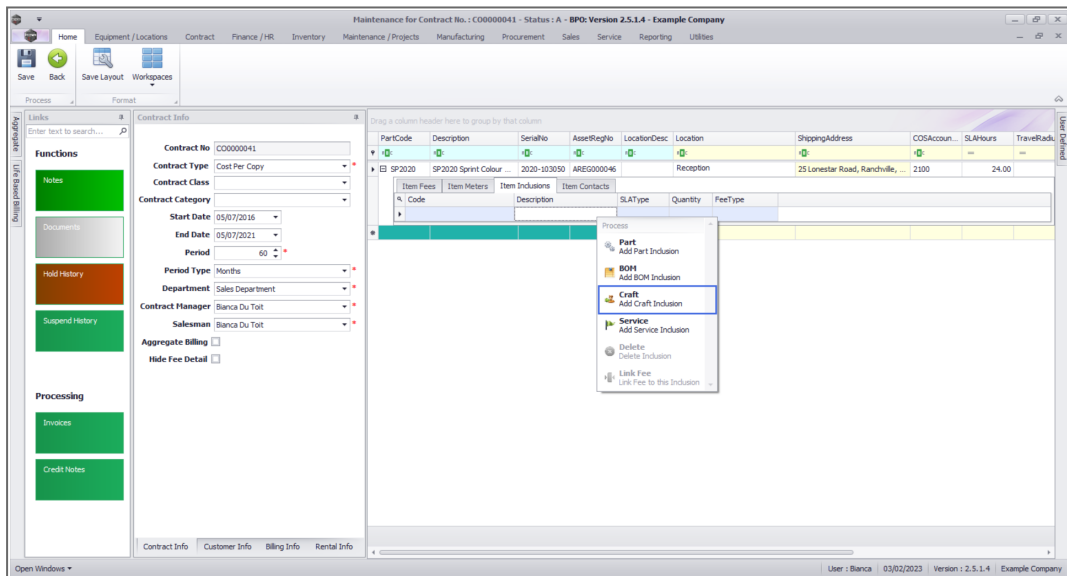


- The selected **BOM** will be added to the **Item Inclusions** frame.
- **Code:** This field will auto populate with the code of the selected item.
- **Description:** This field will auto populate with the description of the selected item.
- **SLA Type:** This field will auto populate with the SLA type of the selected item.
- **Quantity:** Type in the quantity included for the selected BOM.
- **Fee Type:** This field will only be populated if you **link a fee** to the inclusion.

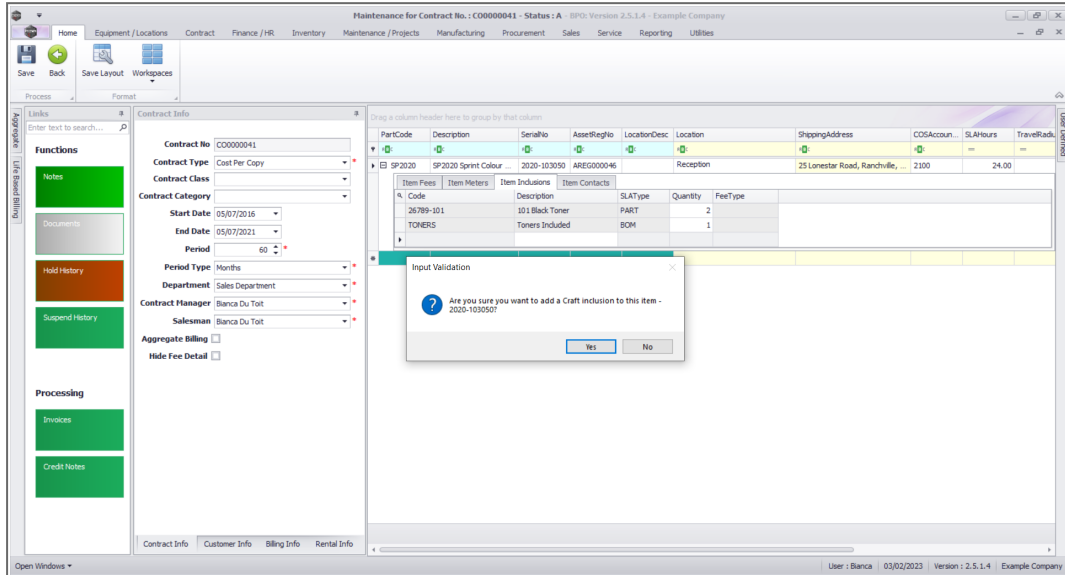


Add Craft Inclusion

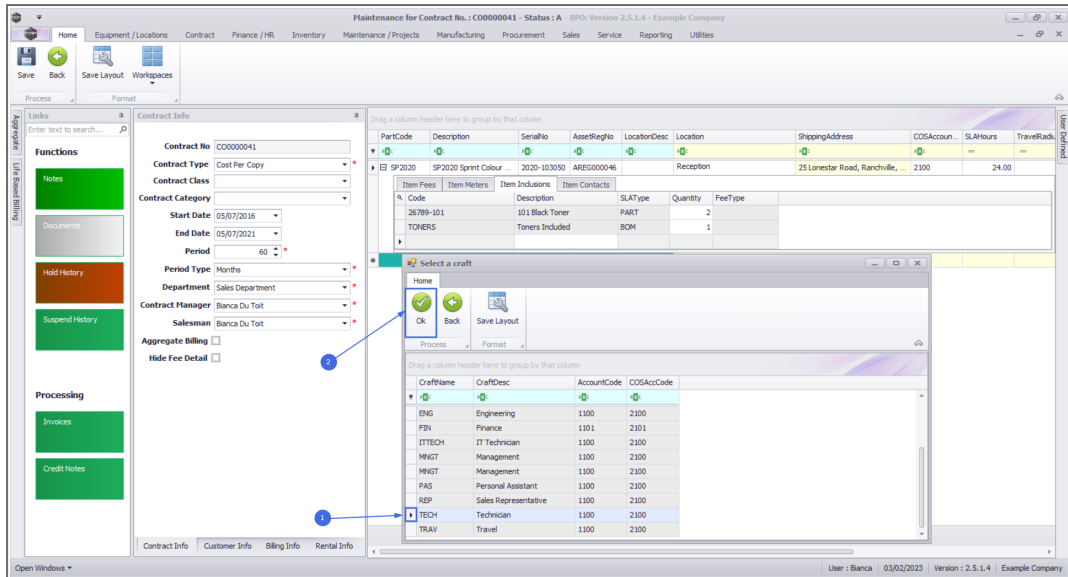
- **Right click** anywhere in a row of the Item Inclusions frame.
- The **Process** menu will pop up.
- Click on **Craft** - Add Craft Inclusion.



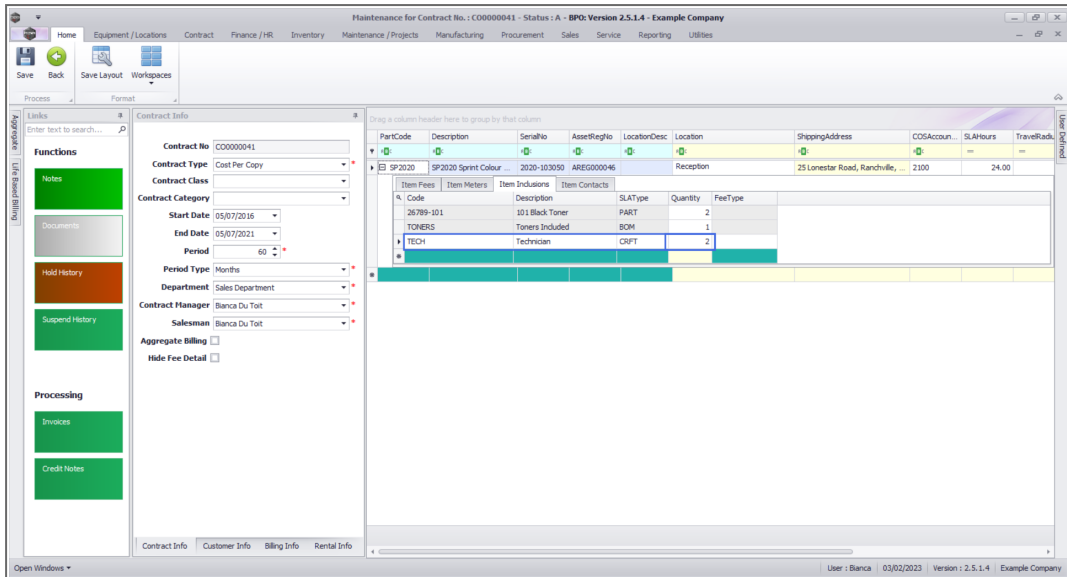
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Craft inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



- A **Select a craft** screen will pop up.
- Click on the **row selector** in front of the **craft** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.

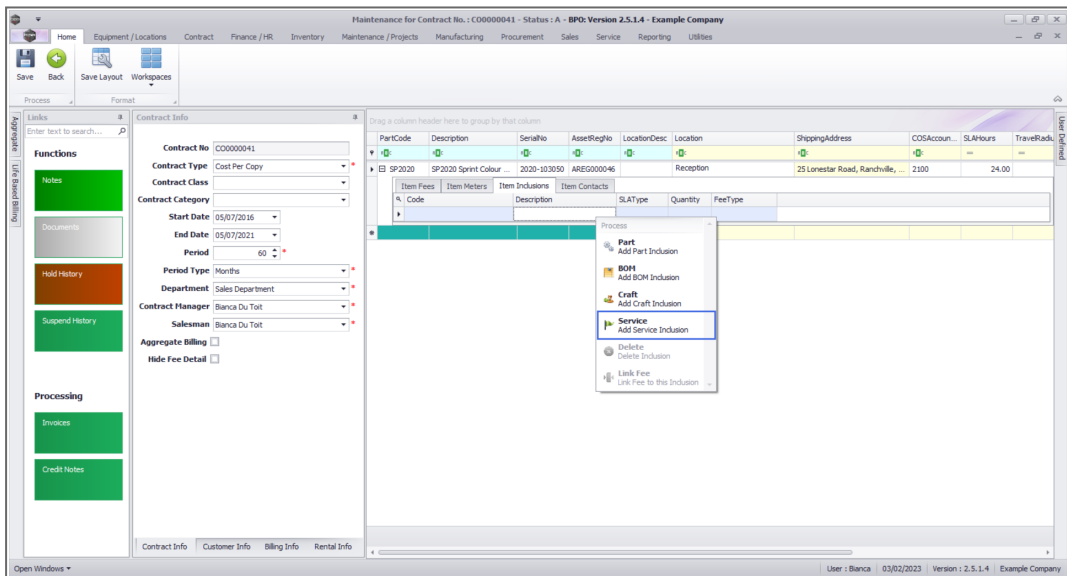


- The selected **Craft** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the SLA type of the selected item.
 - **Quantity:** Type in the number of hours included for the selected Craft.
 - **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.

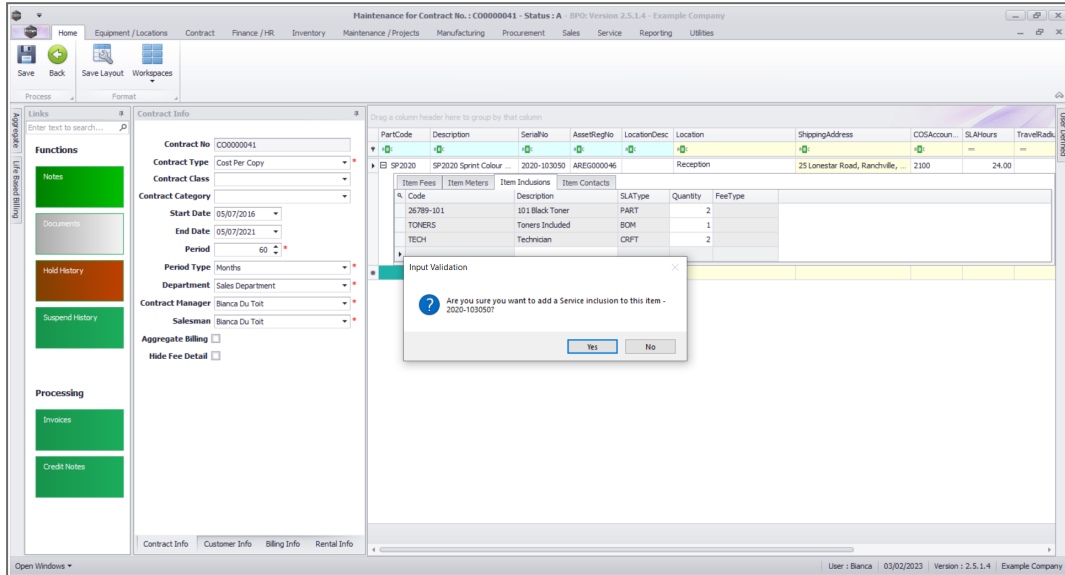


Add Service Inclusion

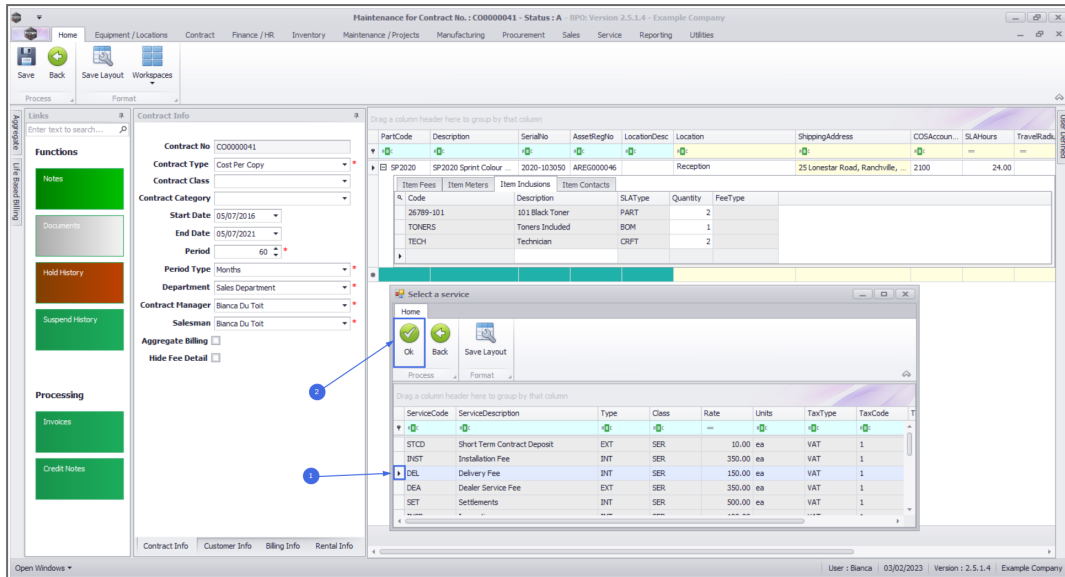
- **Right click** anywhere in a **row** of the **Item Inclusions** frame.
- The **Process** menu will pop up.
- Click on **Service** - Add Service Inclusion.



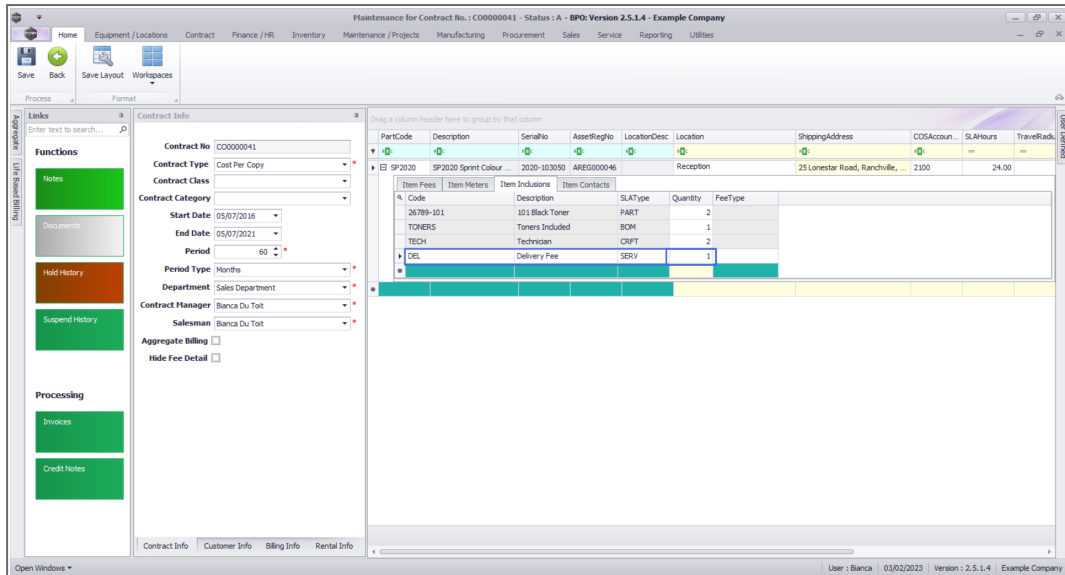
- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to add a Service inclusion to this item - [Serial Number or Location Description]?**
- Click on **Yes**.



- A **Select a service** screen will pop up.
- Click on the **row selector** in front of the **service** you wish to **add** to this .png as an **inclusion**.
- Click on **Ok**.



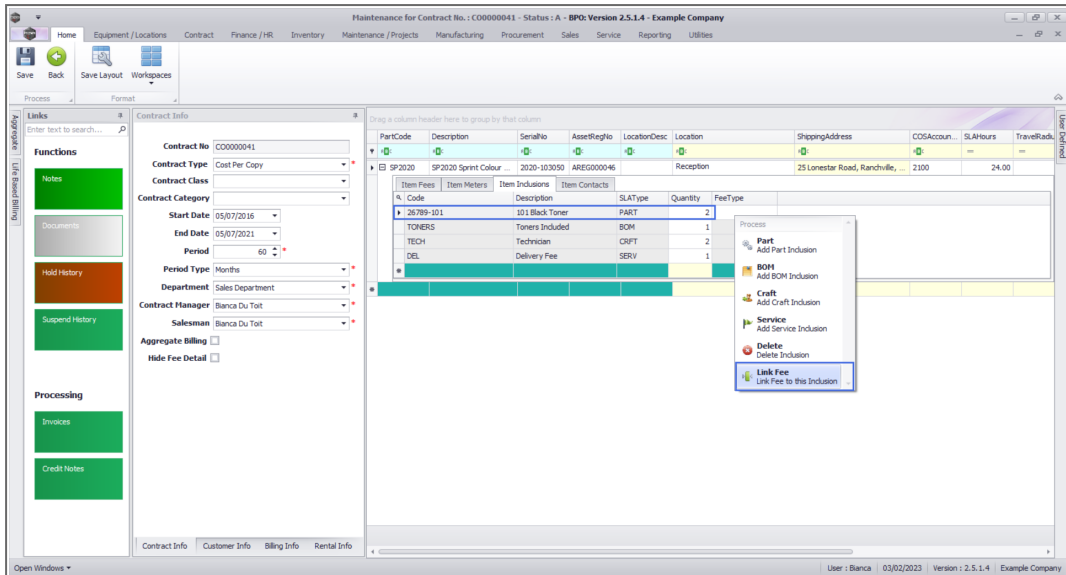
- The selected **Service** will be added to the **Item Inclusions** frame.
 - **Code:** This field will auto populate with the code of the selected item.
 - **Description:** This field will auto populate with the description of the selected item.
 - **SLA Type:** This field will auto populate with the SLA type of the selected item.
 - **Quantity:** Type in the quantity included for the selected Service.
 - **Fee Type:** This field will only be populated if you [link a fee](#) to the inclusion.



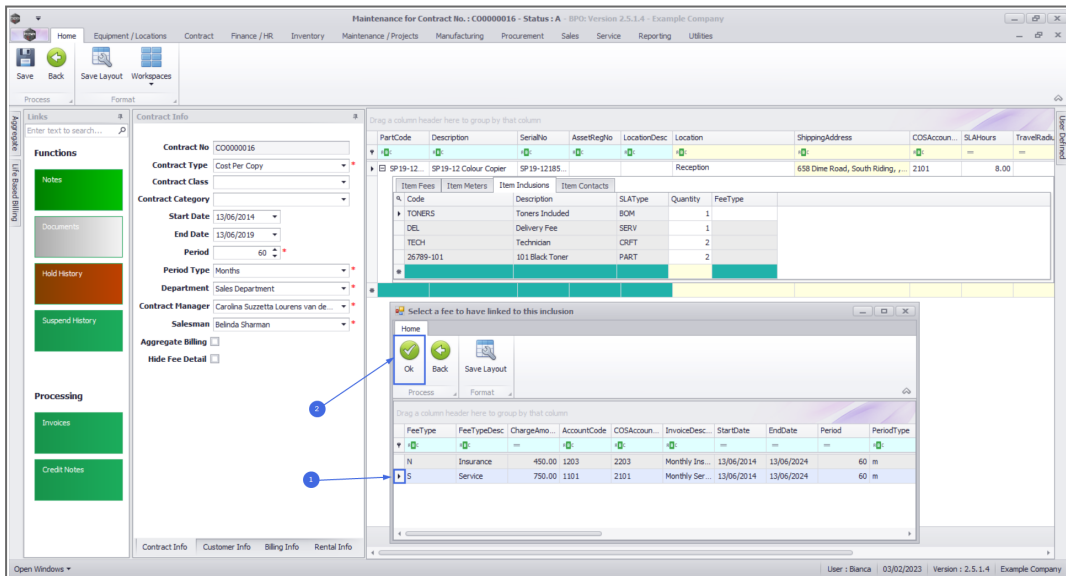
- **Note:** You can add more than one of each type of item inclusion to the .png.

Link a Fee to an Inclusion

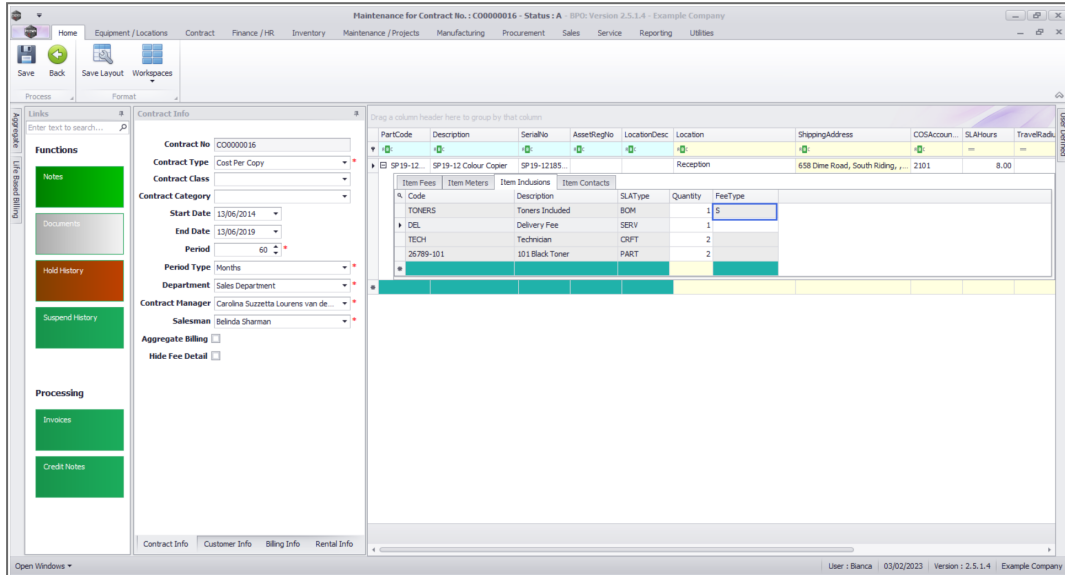
- **Right click** in the **row** of the **item inclusion** that you wish to **link a fee** to.
 - In this image **IT Technician** has been selected.
- The **Process** menu will pop up.
- Click on **Link Fee** - Link Fee to this Inclusion.



- A **The Fee Lookup List** screen will pop up.
- Click on the **row selector** in front of the **fee** you wish to **add** to this inclusion.
- Click on **Ok**.
- **Note:** Only the fees that you selected in the **Item Fees Frame** will be displayed in this screen, and the fee can only be linked to one inclusion.



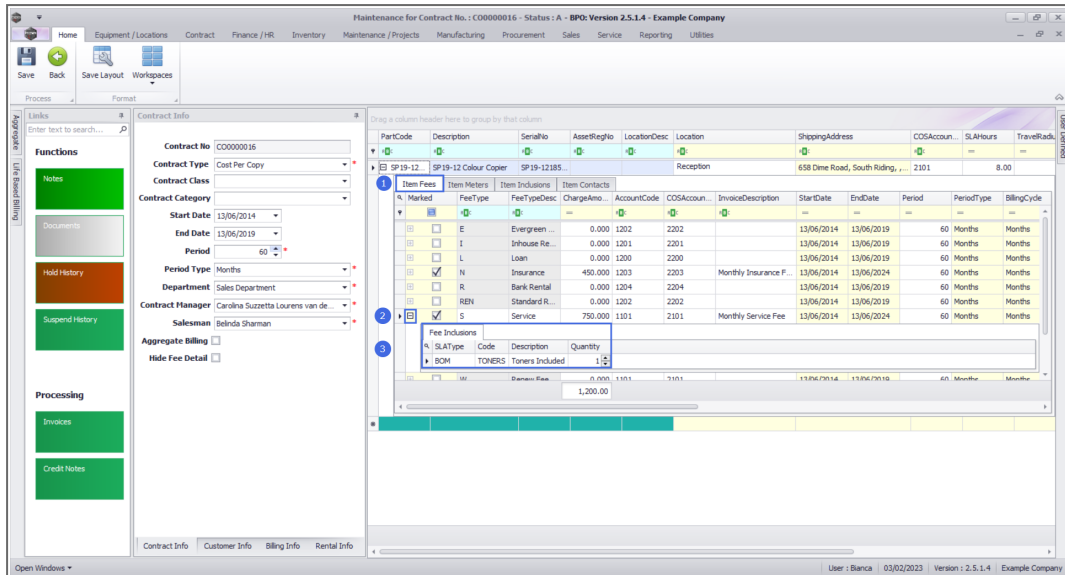
- The **The Fee Type** field will be populated with the selected fee type.
- In this image, **S** - Service was selected, since the selected inclusion is covered by the Service Fee, in this example.



View the linked Inclusion on the Fee Detail

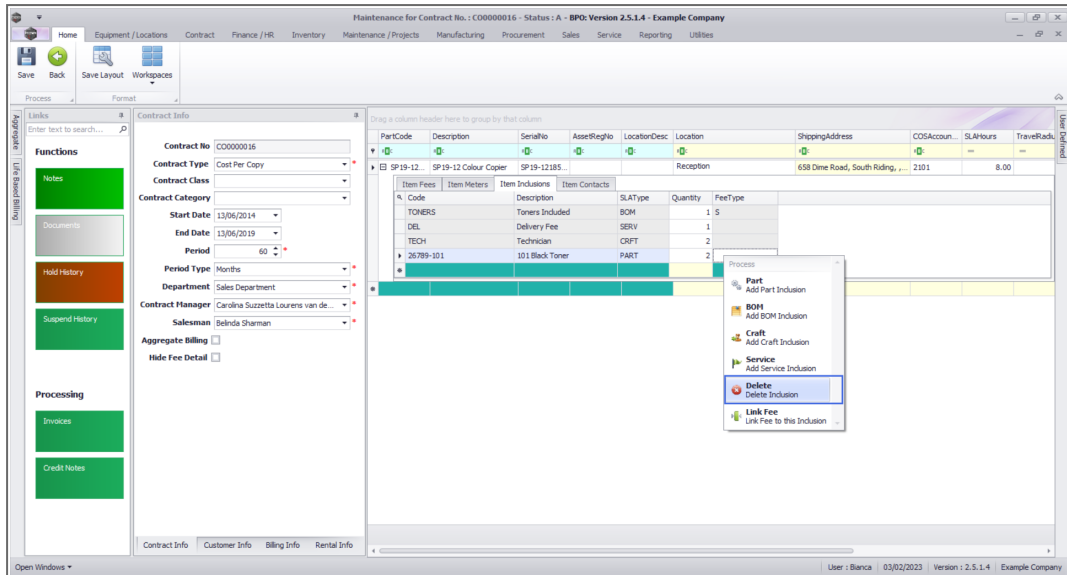
Note: that for this step you will need to save the .png first and then come back to view the Fee's linked Inclusion.

- Click on the **Item Fees** frame.
- Click on the **Expand** button on the fee you linked to an inclusion.
- The **Fee Inclusions** frame will be displayed.
- You can now view the details of the inclusion.
- You can change the **Quantity** of the inclusion in this frame if required.

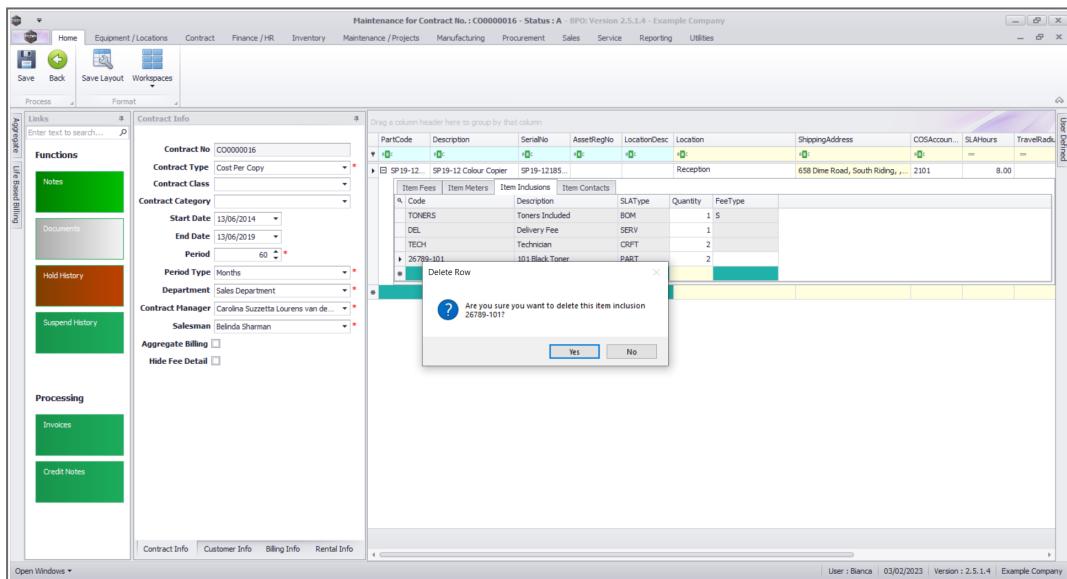


Delete Inclusion

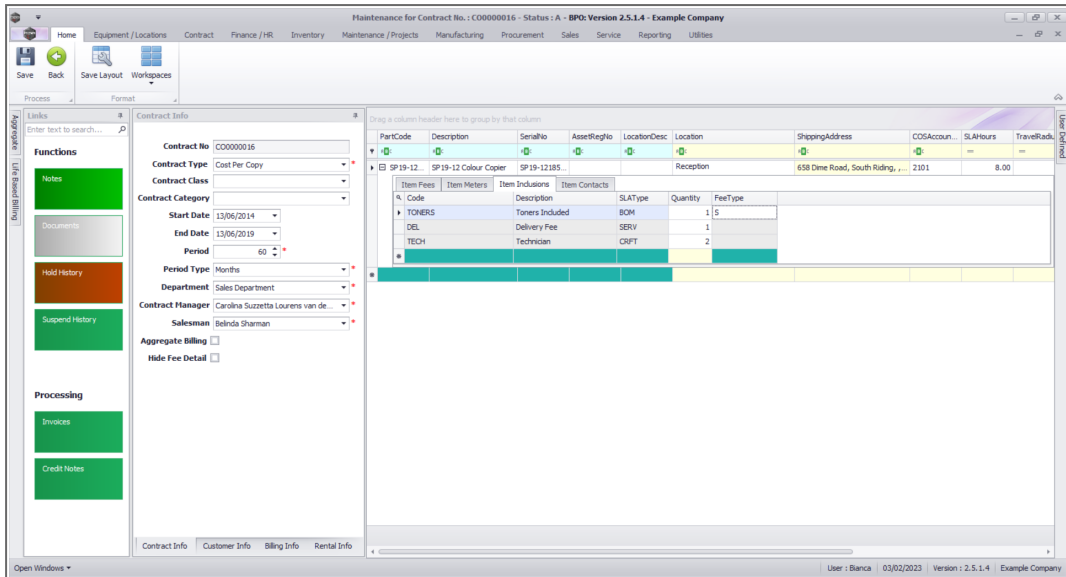
- Another option in the **Item Inclusions Process** menu is **Delete Inclusion**.
- **Right click** in the **row** of the **item inclusion** that you wish to **delete** from the .png.
 - In this image **INST** - Installation Fee has been selected.
- The **Process** menu will pop up.
- Click on **Delete** - Delete Inclusion.



- An **Input Validation** message box will pop up asking:
 - **Are you sure you want to delete this item inclusion - [Serial Number or Location Description]?**
- Click on **Yes**.

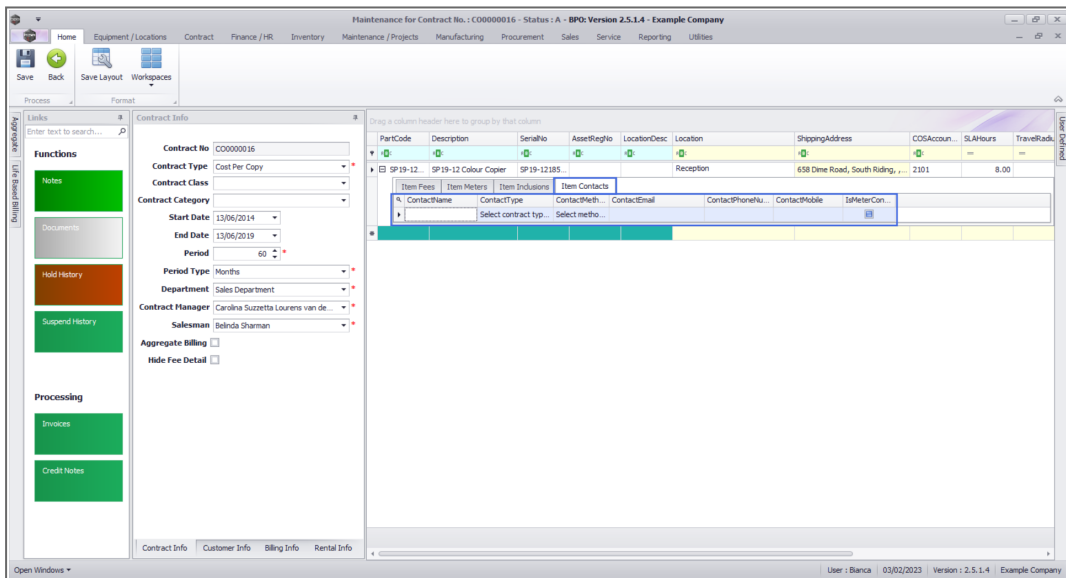


- The selected item will now be **removed** from the **Item Inclusions** frame.



ITEM CONTACTS

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

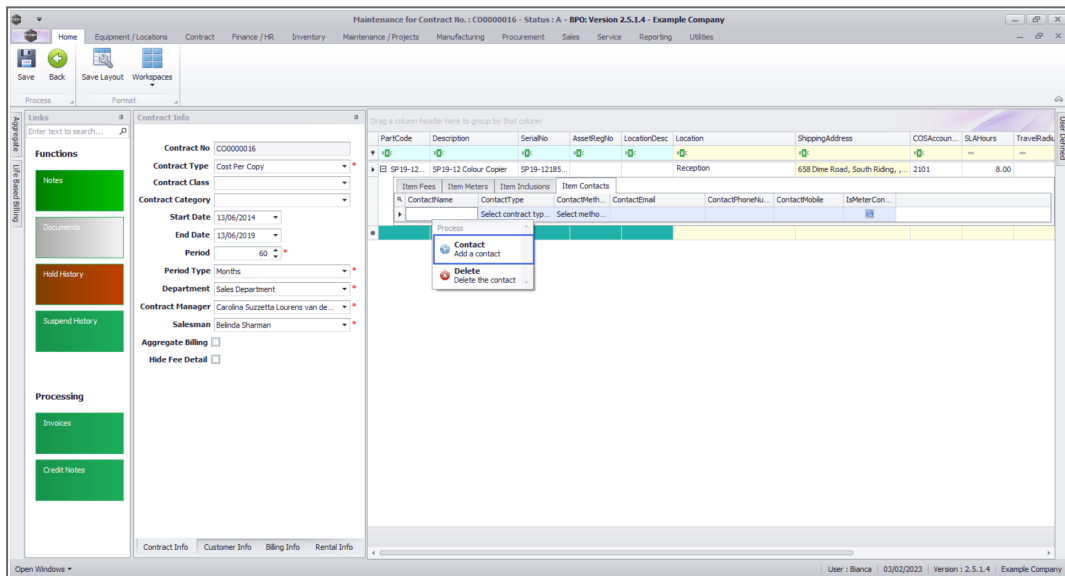


You can add up to 3 types of contacts, depending on your requirements:

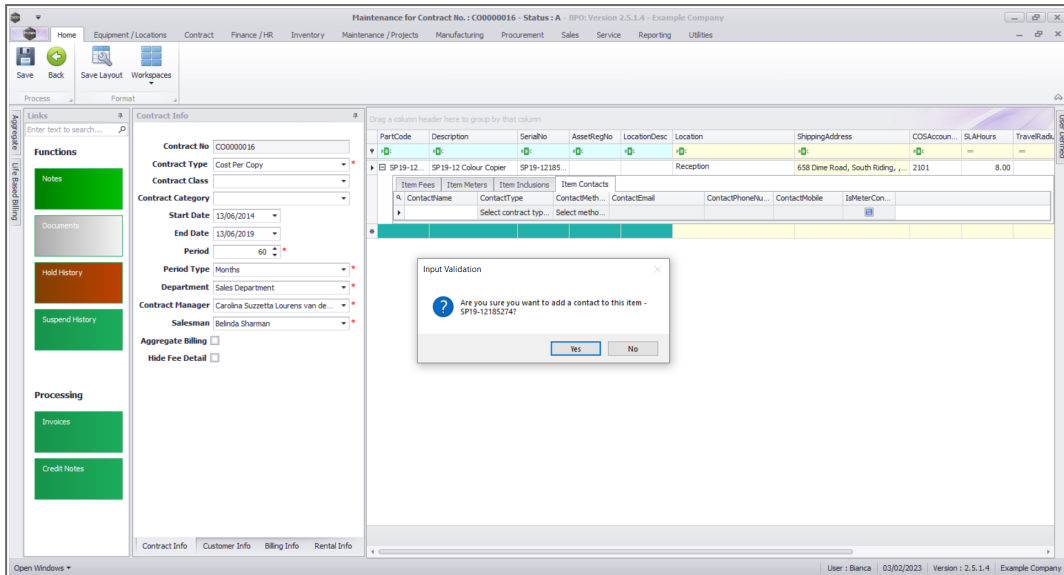
- **Manager Contact:** the client contact who manages the contract or relevant contract item
- **Meter Clicks Contact:** the client contact who will provide meter readings.
- **User Contact:** the client contact who can be called with regards to user queries.

ADD A CONTACT

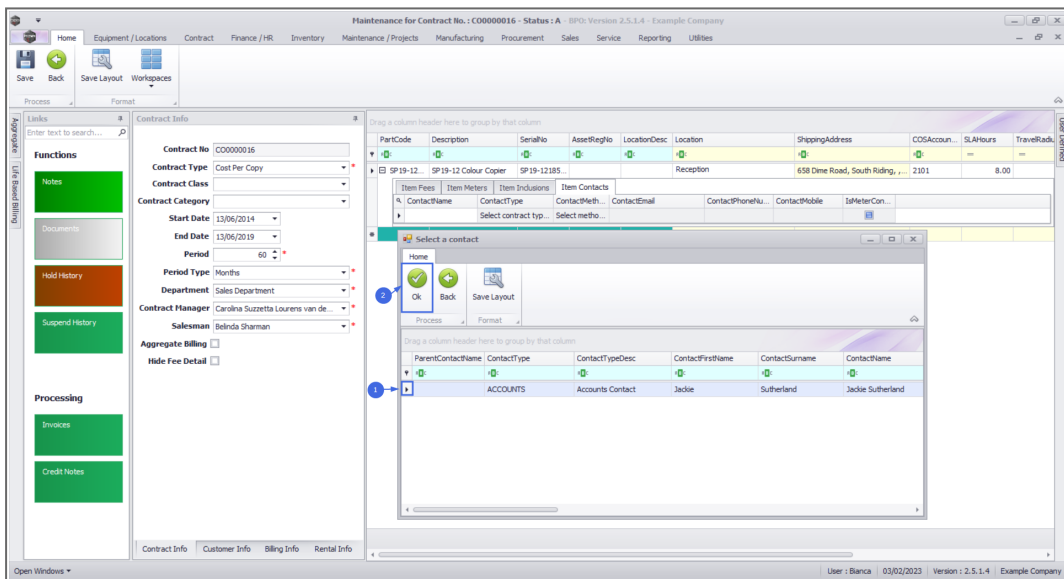
- **Right click** anywhere in the first **row** of the **Item Contacts** frame.
- A **Process** menu will pop up.
- Click on **Contact** - Add a contact.



- 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**.

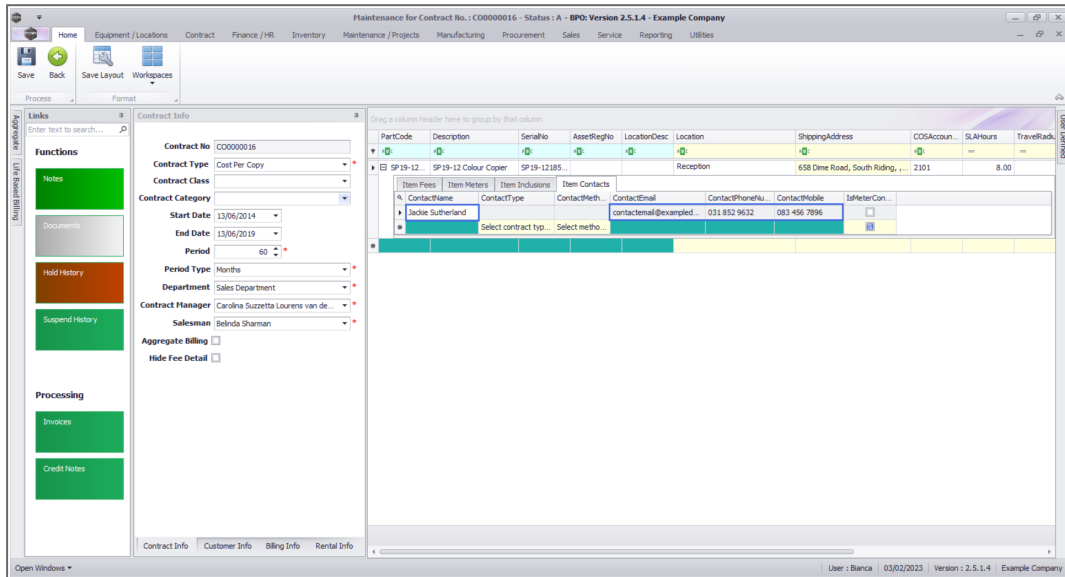


- A **Select a contact** pop up screen will appear.
- Click on the **row selector** in front of the **contact** you wish to **add**.
- Click on **Ok**.

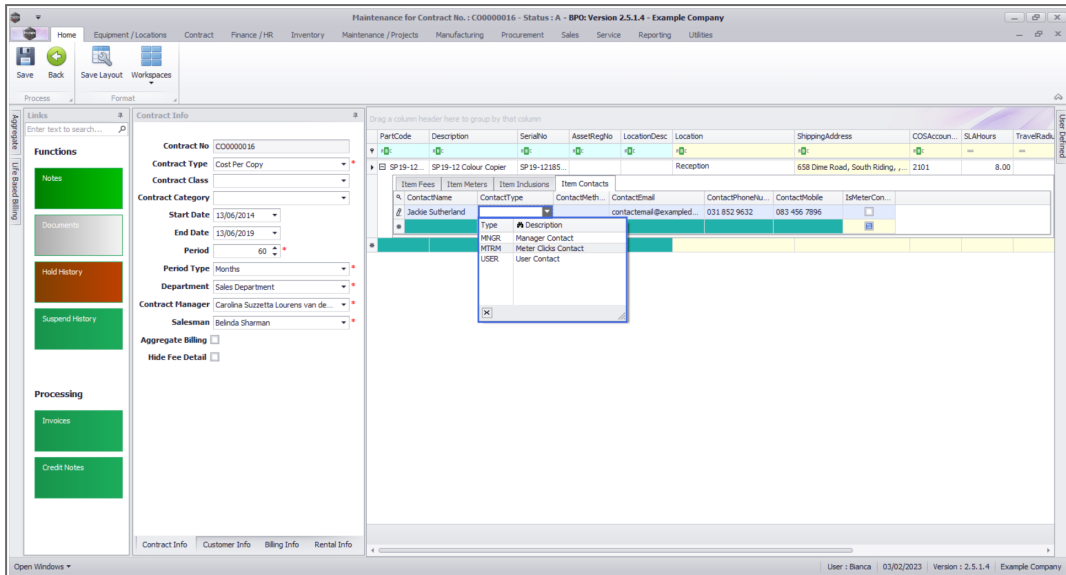


- **Contact Name:** This will now be populated with the selected contact's name.
- **Contact Email:** This will auto populate with the email address **already set up on the selected contact.**

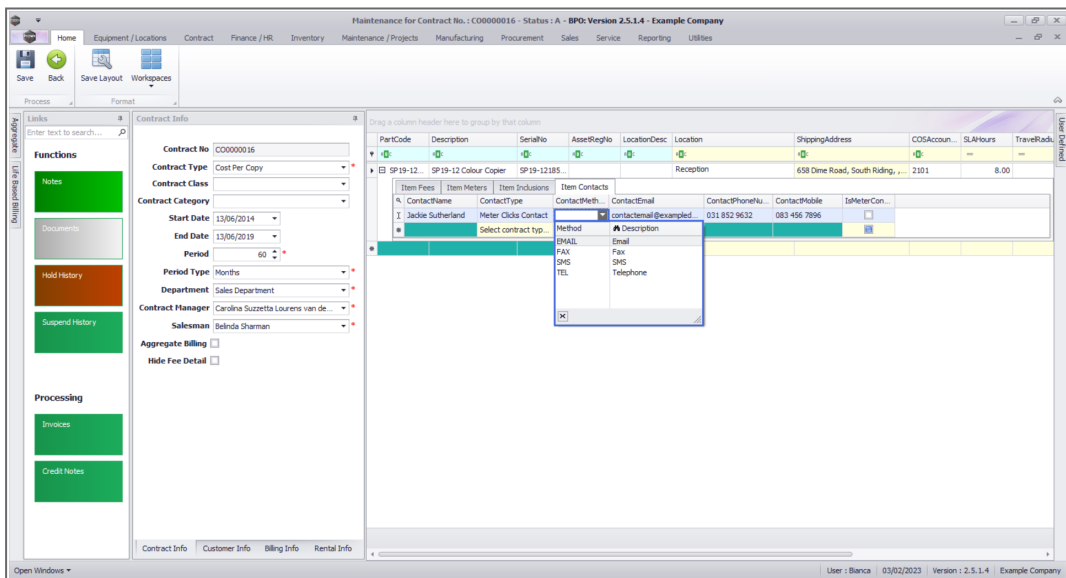
- **Contact Phone Number:** This will auto populate with the phone number **already set up on the selected contract.**
- **Contact Mobile:** This will auto populate with the mobile number **already set up on the selected contact.**



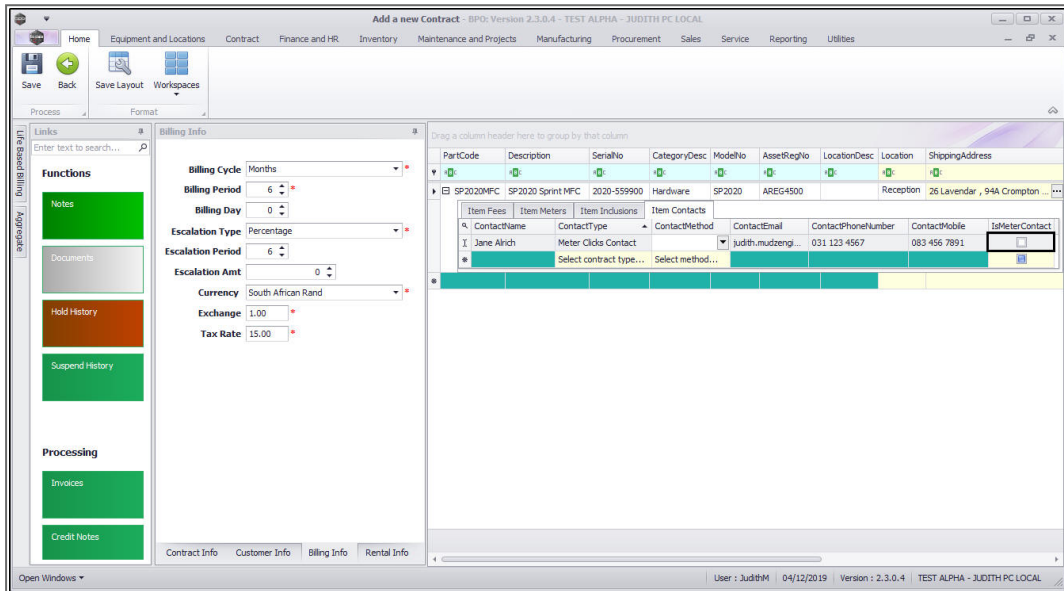
- Click in the **Contact Type** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Type** drop-down menu.
- Click on the **contact type** you wish to assign to this Item.



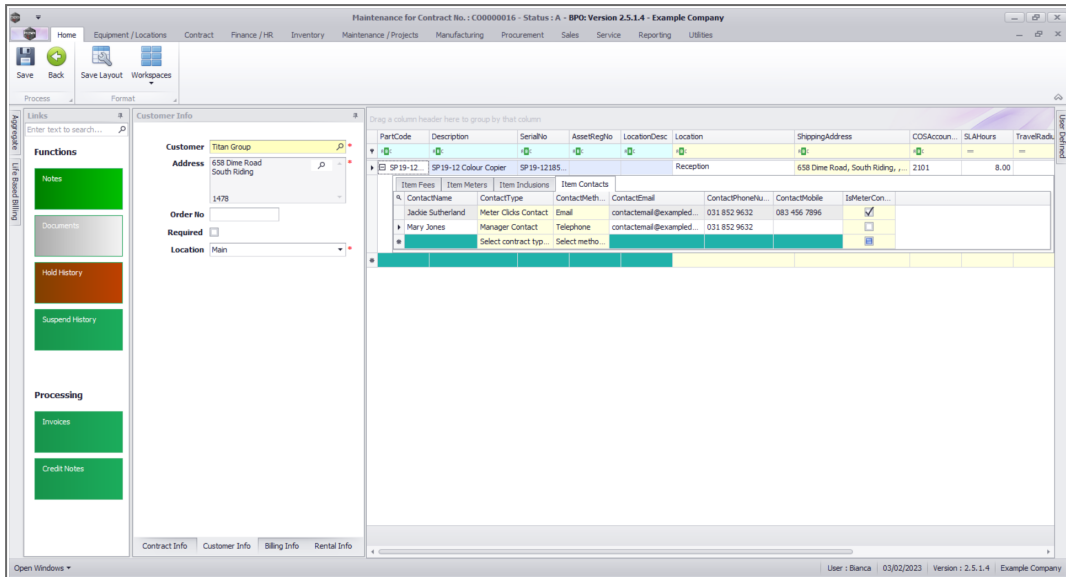
- Click in the **Contact Method** text box to reveal a **drop-down arrow**.
- Click on this arrow to display a **Contact Method** drop-down **menu**.
- Click on the **preferred contact method** you wish to use.
 - In this image **Email** has been selected.



- **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](#).

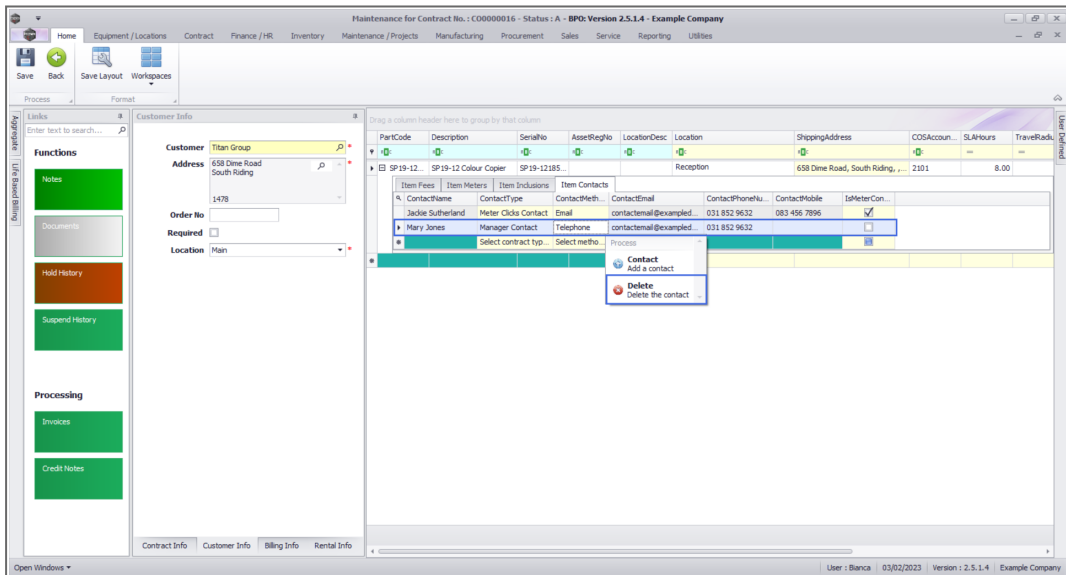


- You can add further contacts to this frame by **right clicking** anywhere in a **row** of the **Item Contacts** frame and following the same process as above.
 - In this image a **second contact** has been added.

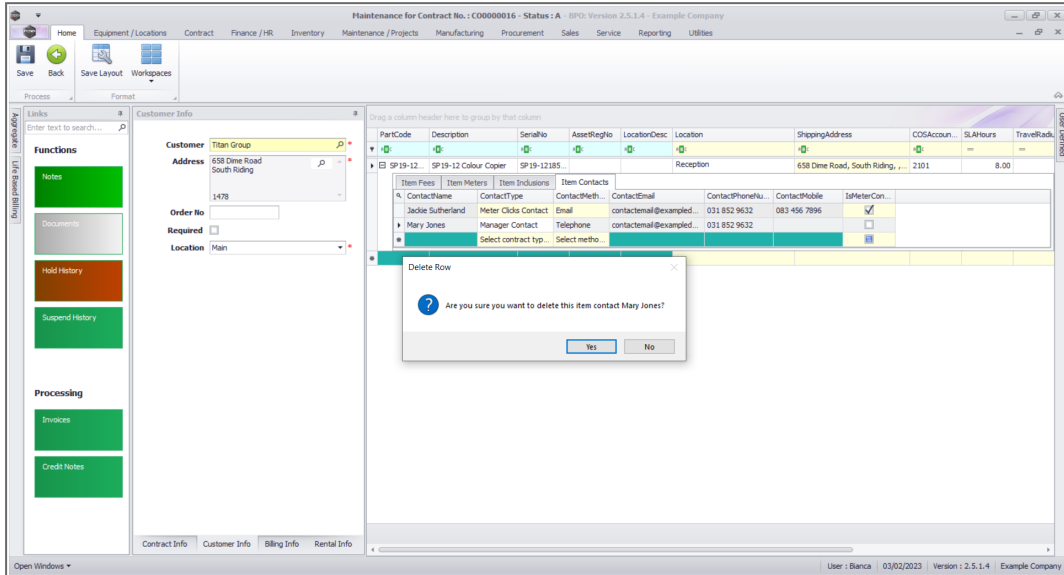


DELETE A CONTACT

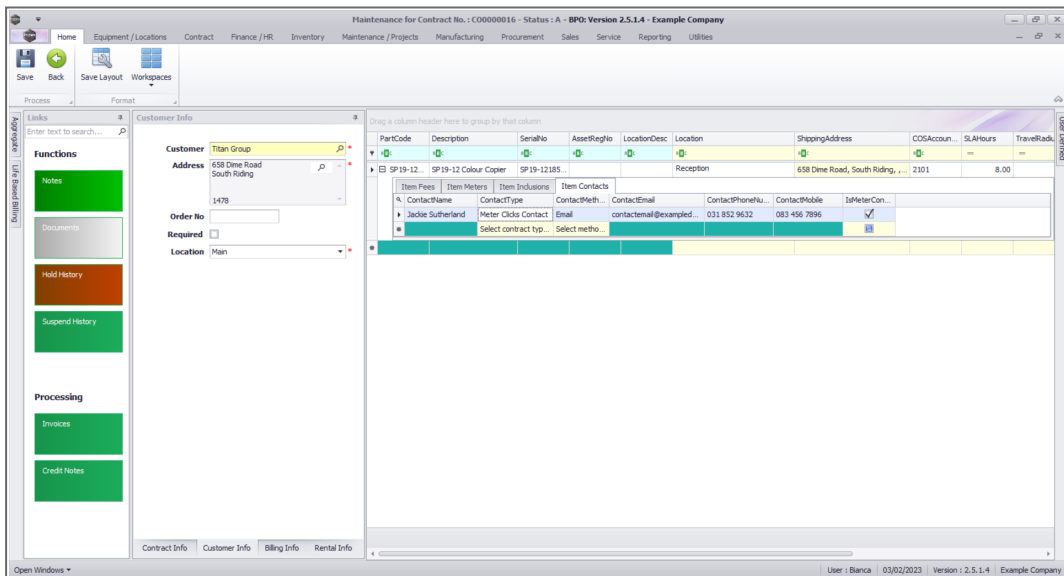
- You can also **delete** a contact if required.
- **Right click** in the **row** of the **contact** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** - Delete the contact.



- 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**.

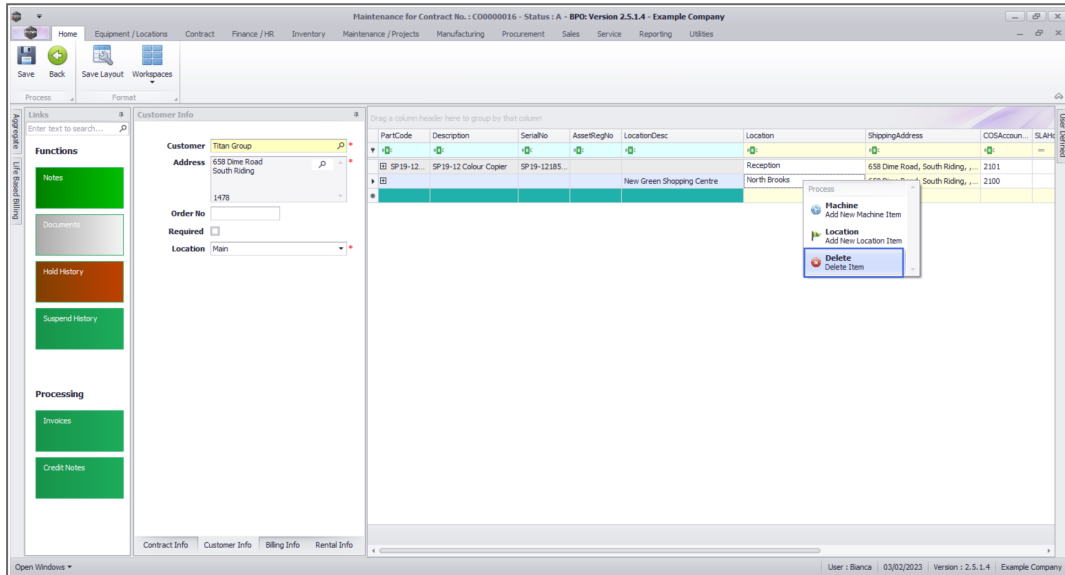


- The contact has now been **deleted** from the **Items Contacts** frame.

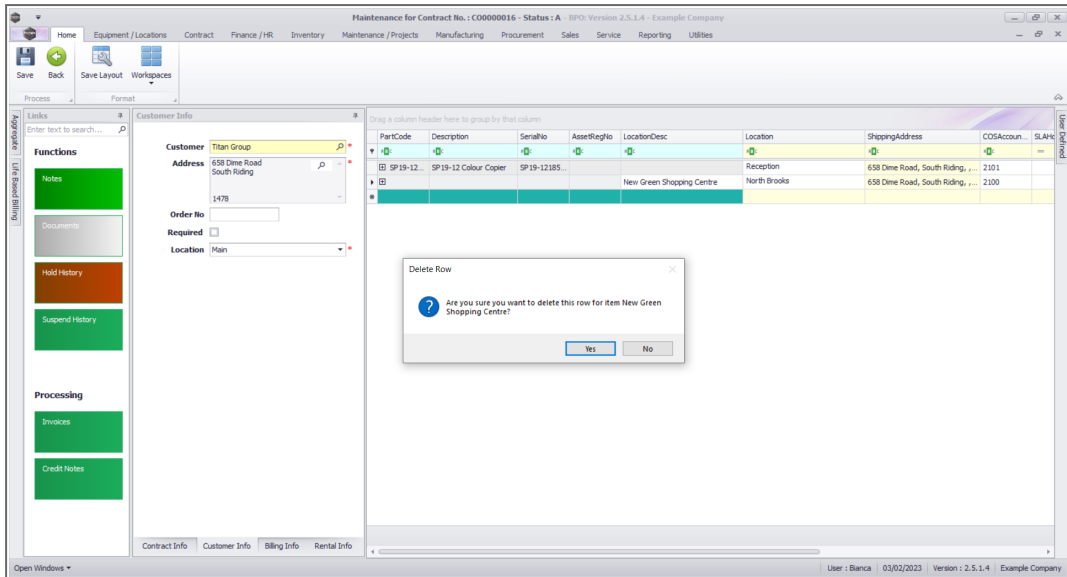


DELETE CONTRACT ITEM

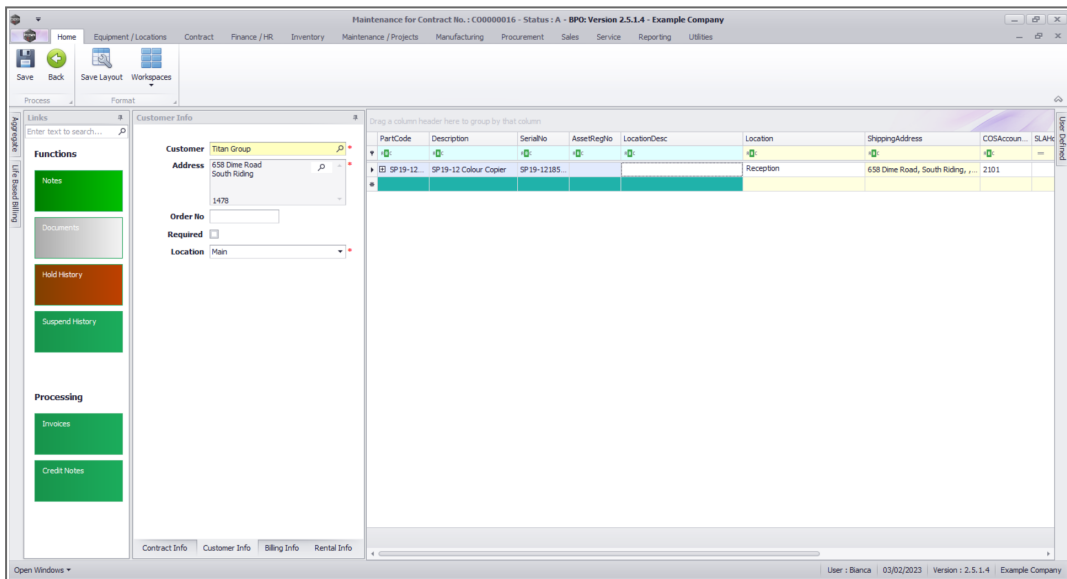
- You can **delete** a contract item if required.
- **Right click** in the **row** of the **contract item** you wish to **delete**.
- The **Process** menu will pop up.
- Click on **Delete** - Delete Item.



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



- The contract item has now been **deleted** from the **Contract Parts** frame.



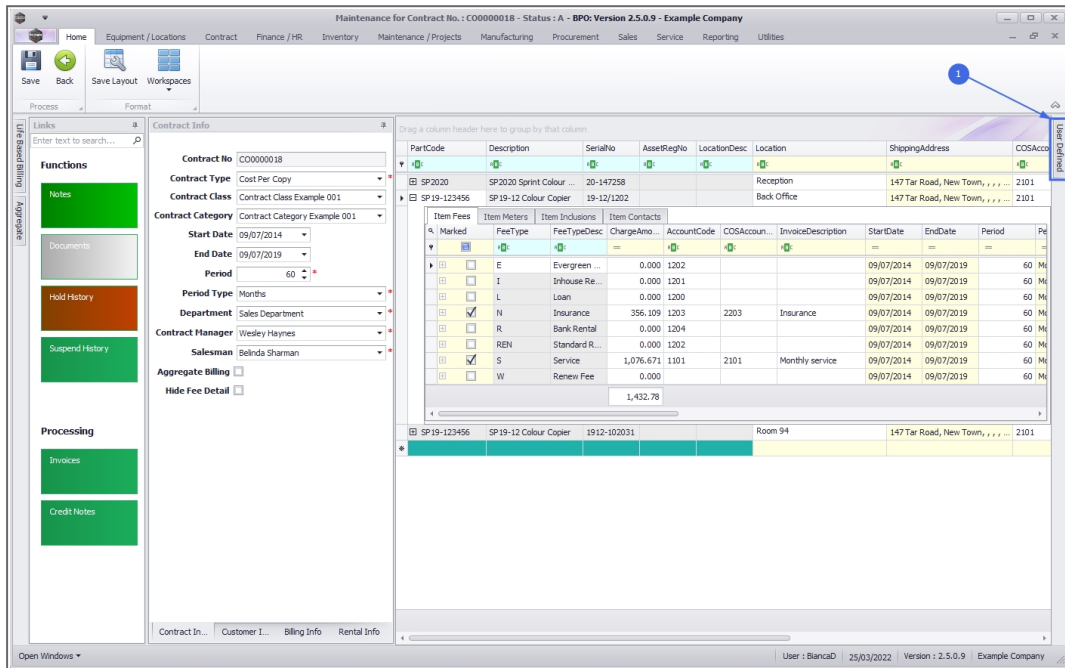
USER DEFINED FIELDS

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective

tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

- Click on the **User Defined** dock panel tab to open the panel

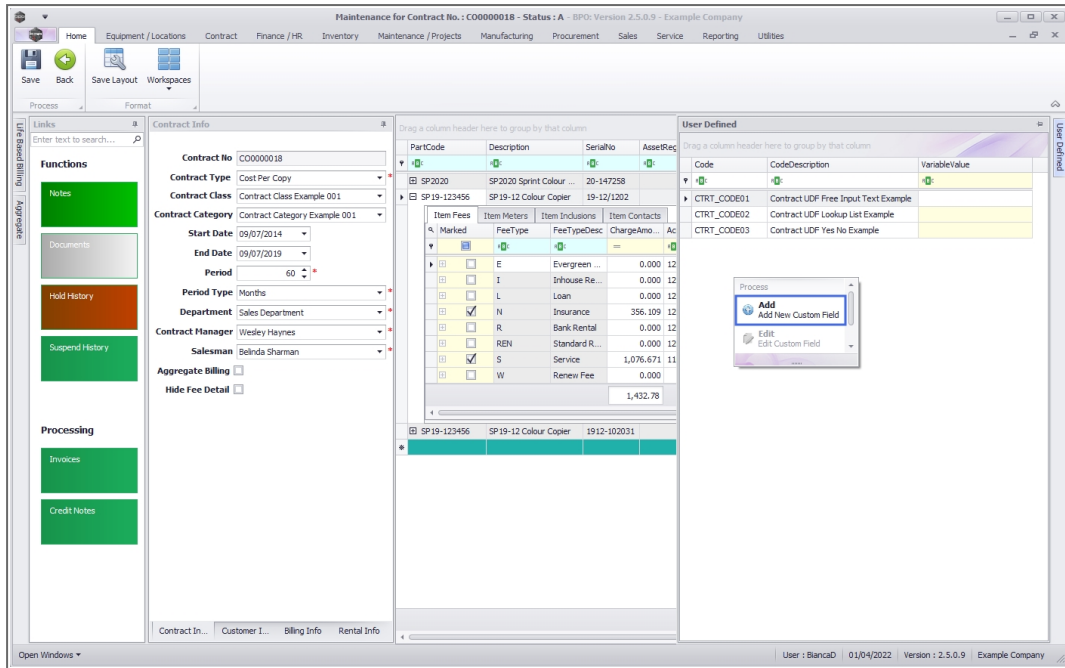


ADD NEW CUSTOM FIELD

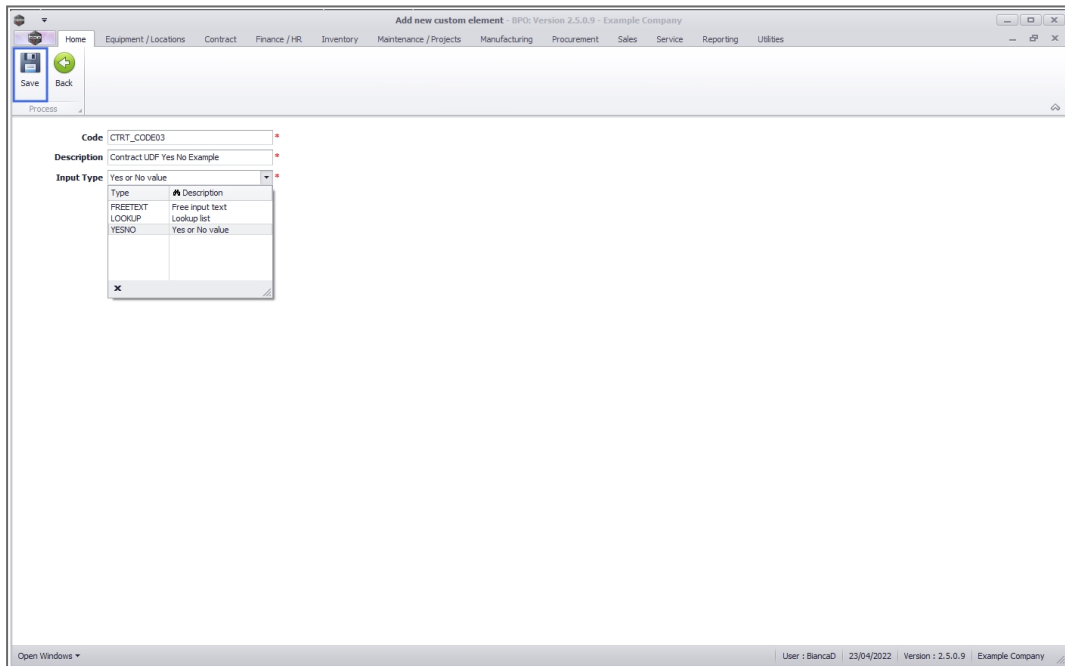
New User Defined Customer Fields can be created from here. Any User Defined field created will be available for update on all contracts.

- Right click in User Defined panel and select **Add New Custom Field**

¹ BPO2 v2.5.0.8 or higher. " **Add Interest Rate** " on page 3



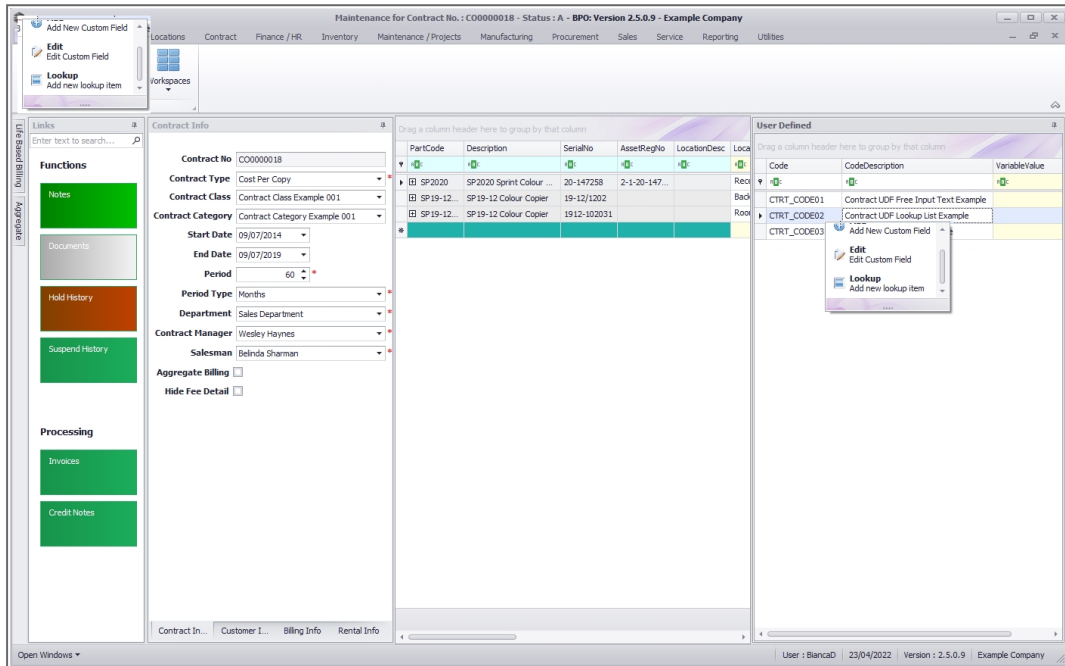
- Type in a **Code** and **Description** for the new User Defined Field.
- Select the Input Type.
- Click on the **Save** button.



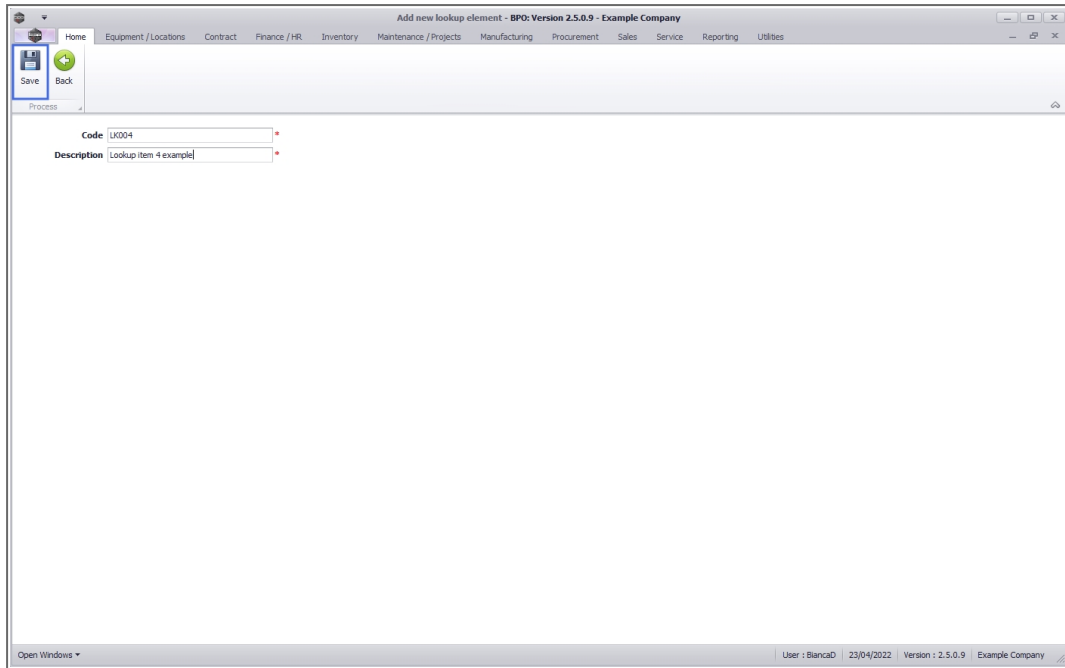
ADD LOOKUP ITEMS

For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

- Right click on Lookup input type Custom Field and select **Add new lookup item** (you may need to scroll down).



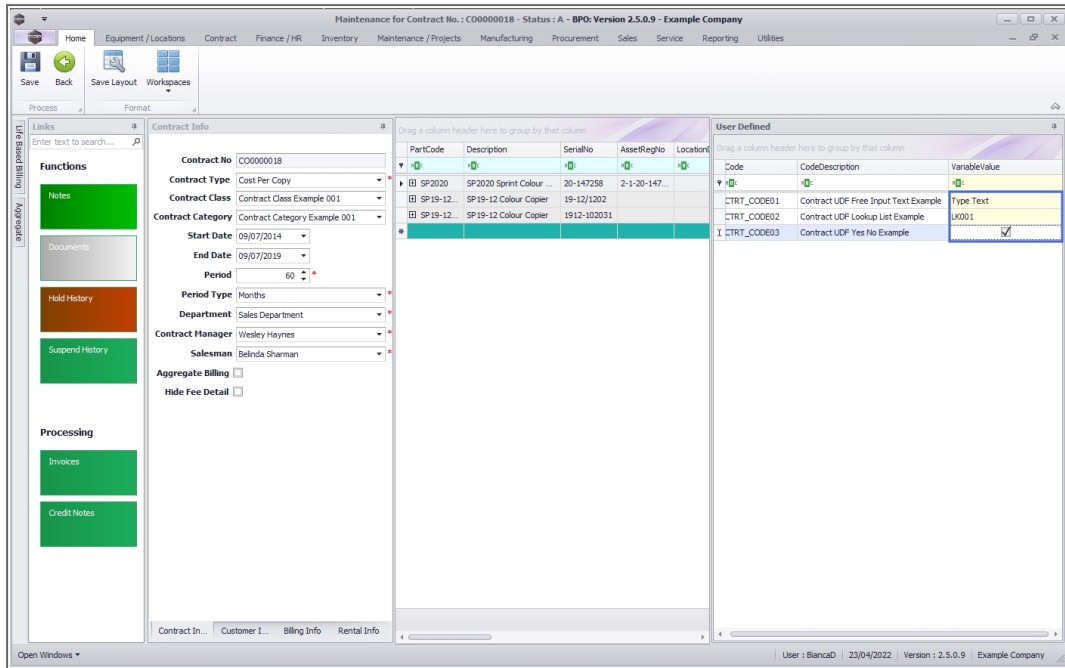
- Type in the lookup item **Code** and **Description**.
- Click on the **Save** button.



UPDATE CUSTOM FIELD

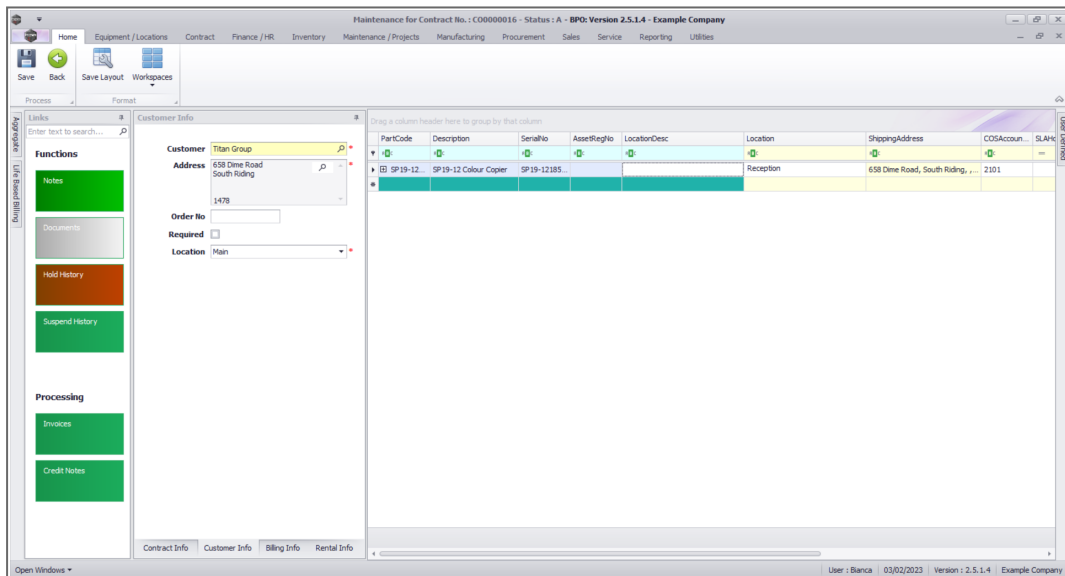
This will update the detail for the User Defined Field for this contract.

- **Variable Value:** Type in, pick from the Lookup List or Toggle Yes/No depending on the Input type.



SAVE THE CONTRACT

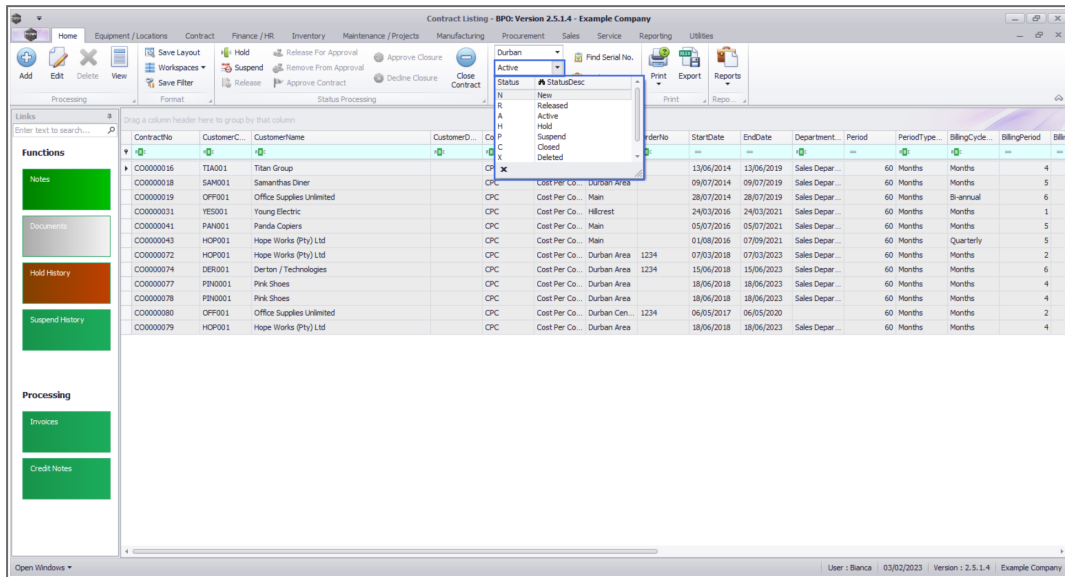
- When you are done, click on **Save**.



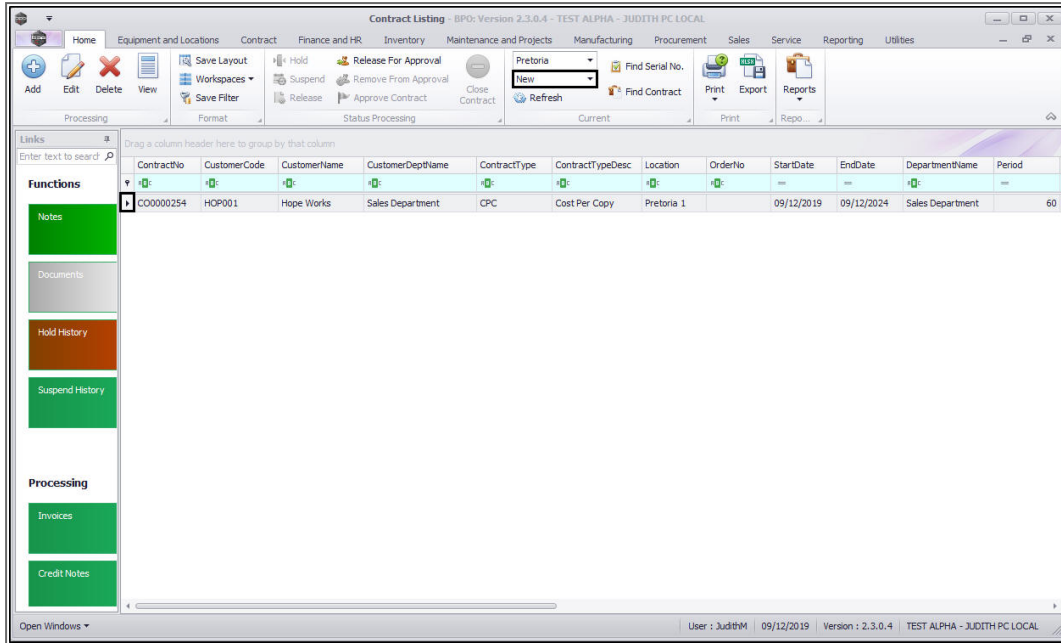
- The contract will be **saved** and you will return to the **Contract Listing** screen where the status defaults to **Active**, or will be set

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.



Related Topics

- [Release Contract For Approval](#)
- [Approve Contract](#)

MNU.112.049

