

Contract Maintenance Menu

- [Contract Maintenance Setup](#)
- [Add Contract](#)
- [Import /Export Contract](#)

Contract Maintenance Setup

Video Training Manual 2016 - [Click Here](#)

The Time logging setup is done under the contract maintenance menu

There are 3 setups required:

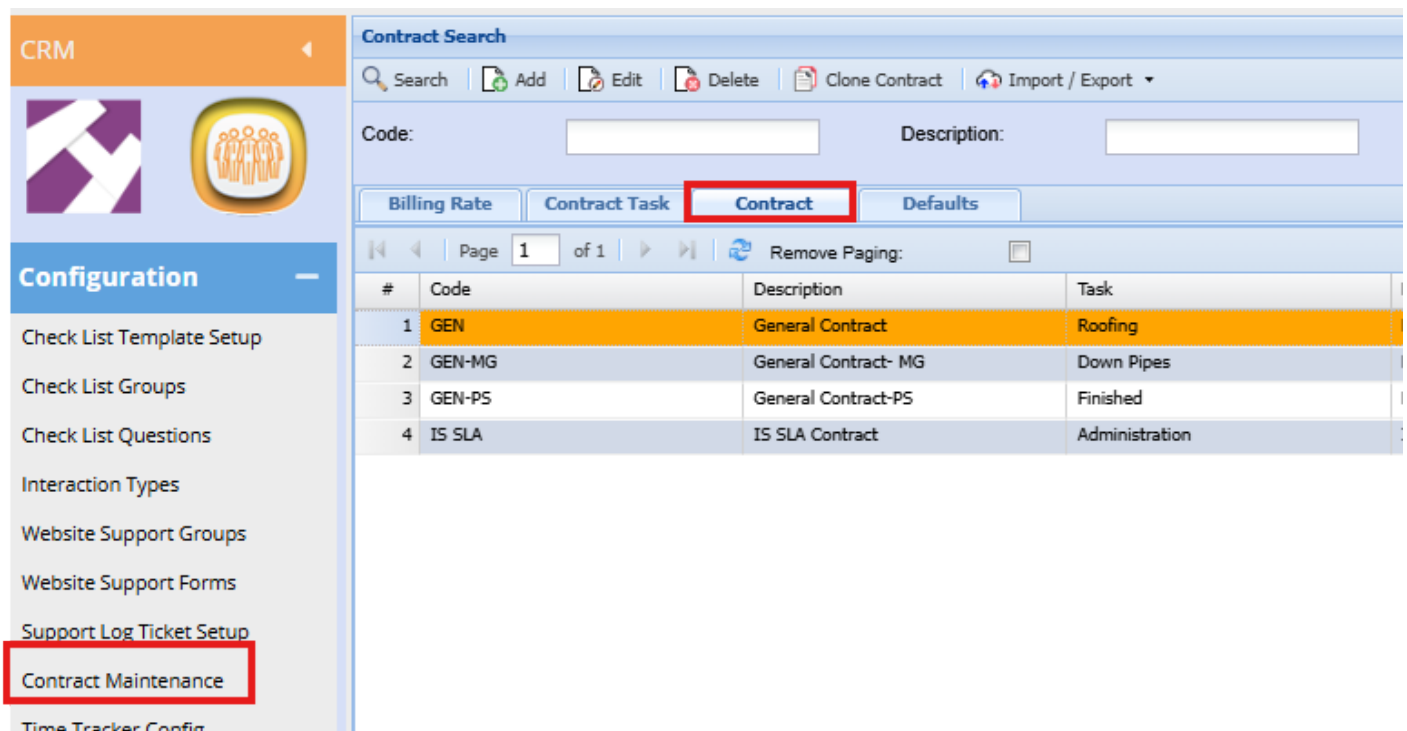
1. The contract
2. The tasks
3. Service items
4. Billing Rates

Once these have been setup, you will need to link these to one another

CRM Module> Configuration> Contract Maintenance

Contract Task setup

Click the Contract Tab



The screenshot displays the CRM interface for Contract Maintenance. On the left, the 'Configuration' menu is visible, with 'Contract Maintenance' highlighted. The main area shows the 'Contract Search' tab, which includes a search bar, a table of contracts, and a 'Contract' tab highlighted in red. The table lists the following contracts:

#	Code	Description	Task
1	GEN	General Contract	Roofing
2	GEN-MG	General Contract- MG	Down Pipes
3	GEN-PS	General Contract-PS	Finished
4	IS SLA	IS SLA Contract	Administration

Add	To create a new Contract
Edit	To edit existing contracts
Code	Enter a code for the Contract

Description	Enter a description for contract
Archived	This is used to flag obsolete contracts that are no longer in use. we do not allow them to be deleted due to audit trails and historic time logs that may have the contract linked

Billing Rate Tab

Contract Search

Search

Add

Edit

Delete

Clone Contract

Import / Export

Code:

Description:

Archived:

☐

Billing Rate

Contract Task

Contract

Defaults

Page 1 of 1

Remove Paging:

☐

#	Code	Description
1	CHG/100	Charge \$100
2	CONS/800	Consulting R 800
3	IS SLA	IS SLA Contract
4	NONCHG	Non Charge

Edit Billing Rate

Details

Custom Fields

Code:

IS SLA

Description:

IS SLA Contract

Hourly Rate:

100

Rate Type:

Rate 1 - Normal I

Non Billable:

☐

Archived:

☐

Save & New

Save & Close

Save

Close

Add	To add a new billing rate
Edit	To edit an existing rate
Code	Enter SLA or billing rate code
Description	Enter brief description of SLA or billing rate
Hourly Rate	Enter the amount billed per hour
Rate Type	Select the billing rate tye on the drop down
Non Billable	Put a tick of an SLA is non billable
Archived	If the archived box is ticked, the billing rate will be achieved

Contract Task Tab

Video training Manual 2016 - [Click Here](#)

Click the Contract Task Tab

Contract Search

Search

Add

Edit

Delete

Clone Contract

Import / Export

Code:

Description:

Archived:

Billing Rate

Contract Task

Contract

Defaults

Page 1 of 1

Remove Paging:

#	Code	Description	Service Item Default	Completed
1	ACC	Accident	Labour General	☐
2	ADMIN	Administration	Administration	☐

Edit Contract Task

Details
Notes / Days
Custom Fields

Close

Code:
DES1
Description:
Site Design

Start Date:
End:
Colour Text:
Abc 123 !#&

Service Item Default:
Labour General
Completed:
Archived:

Code:
Description:
Search

Available Service items

Page 1 of 1
Remove Paging:
Add All
Displaying 1 - 3 of 3

#	Stock Code	Service Item Description
1	ADMIN	Administration
2	LAB/INST	Labour Installation
3	LAB/MAN	Labour Manufacturing

Selected Service items

Page 1 of 1
Remove Paging:
Remove All
Displaying 1 - 1 of 1

#	Stock Code	Service Item Description
1	LAB/GEN	Labour General

Save And New
Save And Close
Save
Close

Add	To add a new task
Edit	To edit an existing task
Code	Enter an code for the task
Description	Enter a task description or name
Start Date	The date could be set to a year if the tasks are to be reviewed yearly - Not mandatory
End	The date could be set to a year if the tasks are to be reviewed yearly - Not Mandatory
Colour Text	you can enter colour codes to differentiate the different tasks

Service Item Default	This field allows the default service to be chosen from the selected list
Completed	
Archived	If the archived box is ticked, the billing rate will be achieved
Code	This field allows the user to search for an existing service item code
Description	This field allows the user to search for an existing service using the description
Available Service Items Grid	These will be the available service items that can be selected to be used in the service item for billing purposes
Selected Service Items Grid	These are the service items selected from the above list that will be available for use

The date could be set to a year if the tasks are to be reviewed yearly

Buttons

Search	Search button to populate the available service item list
Add All	Allows the user to add existing items
Remove All	Allows the user to remove all selected items

Note/Days

These fields define the working day hours

these details are not mandatory to complete. they are typically used for scheduling

Edit Contract Task

Details

Notes / Days

Custom Fields

Close

Working Hours:

8

Days From Start:

1

Hrs:

8

Lag Days:

60

Hrs:

480

Default Hours:

1.00

Excl Days:

Saturday:

☒

Sunday:

☒

Task Colour:

null

Notes:

Private:

☒

Working Hours	
Days From Start	
Hrs	
Lag Days	
Hrs	
Default Hours	
Excl Days	
Text Colour	
Notes	Users can add notes for internal use
Private	

Link Contract to Tasks & billing rates

Click the Contract tab

Click edit to edit the contract

Click the task tab

Activate the relevant task for the specific contract

Select the default task

Save and close

Edit Contract

Details | **Tasks** | Billing Rate | Custom Fields

Search | Select/Deselect All | Edit

Code: Description:

Task Default: **Administration**

Page 1 of 1 | Remove Paging: | Displaying 1 - 21 of 21

#	Code	Description	Service Item	Task Hr	Created
1	ACC	Accident		0.50	☐
2	ADMIN	Administration	Administration	1.50	☒
3	DES1	Site Design		1.00	☒
4	DPIPES	Down Pipes		2.00	☐
5	FASCIA	Fascia		1.00	☐
6	FIN	Finished			☐
7	GUT	Gutter / Spouting 5		1.25	☐
8	JBL	Head Unit install			☐
9	M001	Measure			☐

Click the Billing Rate tab

Activate the relevant rates for the task and select the default rate

Save and Close

Edit Contract

Details | Tasks | **Billing Rate** | Custom Fields

Search | Select/Deselect All

Code: Description:

Billing Rate Default: **IS SLA Contract** | Potential Billing Rate: IS SLA Contract

Page 1 of 1 | Remove Paging: | Displaying 1 - 4 of 4

#	Code	Description	Rate	Created
1	CHG/100	Charge \$100	100.00	☐
2	CONS/800	Consulting R 800	800.00	☐
3	IS SLA	IS SLA Contract	200.00	☒
4	NONCHG	Non Charge	0.00	☒

Defaults Tab

This tab allows one to set certain defaults, so the user does not have to complete all these fields when capturing the time logs.

Contract Search

Search | Add | Edit | Delete | Clone Contract | Import / Export

Code: [] Description: [] Archived: []

Defaults

Charge Travel Fees: ☒ Charge Toll Fees: ☐

Travel Bill Type: ☒ Distance ☐ Time

Distance Rate: []

Service Item: LAB/GEN - Labour General

Travel Item: TRAV - Travel

Toll Fees Item: TOLI - Toll Fees

Toll Value: 50

Contract: General Contract

Task: Administration

Billing Rate: Consulting R 800

Potential Billing Rate: Consulting R 800

Time Rate: 7.5

Time Travelled: 1

Distance To: []

Save Defaults

Charge Travel Fees	This will set the default to always charge travel. Tick off will set default to off, indicating no travel charges. user can manually tick the box on time log capture if applicable.
Charge Toll Fees	This will set the default to always charge toll fees. Tick off will set default to off, indicating no toll fees charges. user can manually tick the box on time log capture if applicable.
Travel Bill Type	Sets the default to charge travel based on distance or time travelled
Distance Rate	Rate per kilometer
Service Item	this is the default service item related to the task selected for the contract
Travel Item	Service item for travel
Toll Fees item	Service item for toll fees
Toll Value	default Toll price
Contract	Default contract. this can be set per user on the user profile setup as well

Task	Default task related to the contract
Billing Rate	Default billing rate to pull through
Potential Billing Task	Default potential billing rate
Time Rate	Travel time default rate
Time Travelled	Travel time default, eg. 1 = 1 hour
Distance To	

Add Contract

Billing Rate

Contract Search

Search

Add

Edit

Delete

Clone Contract

Import / Export

Code:

Description:

Archived:

Billing Rate

Contract Task

Contract

Defaults

Page

1

of 1

Remove Paging:

#	Code	Description	Hourly Rate	Rate Type
1	CHG/100	Charge \$100	100.00	Rate 1
2	IS SLA	IS SLA Contract	200.00	Rate 1
3	NONCHG	Non Charge	0.00	Rate 1

Adding Billing Rate

Edit Billing Rate

DetailsCustom Fields

Code:

CHG/100

Description:

Charge \$100

Hourly Rate:

100

Rate Type:

Rate 1 - Normal I ▾

Non Billable:

☐

Archived:

☐

 Save & New

 Save & Close

 Save

 Close

Edit Billing Rate

Details

Custom Fields

Category:

All

Save

Please click on the save button BEFORE you change the Category

Save & New

Save & Close

Save

Close

Contract Task

Contract Search

Search

Add

Edit

Delete

Clone Contract

Import / Export

Code:

Description:

Archived:

Billing Rate

Contract Task

Contract

Defaults

Page 1 of 1

Remove Paging:

#	Code	Description	Hourly Rate	Rate Type
1	CHG/100	Charge \$100	100.00	Rate 1
2	IS SLA	IS SLA Contract	200.00	Rate 1
3	NONCHG	Non Charge	0.00	Rate 1

Adding Contract Task

Edit Contract Task



Details

Notes / Days

Custom Fields

Close

Code: Description:

Start Date: End: Colour Text:

Service Item Default: Completed: ☐ Archived: ☐

Code: Description:

Available Service items

Page 0 of 0 Remove Paging: ☐ Add All No data to display

#	Stock Code	Service Item Description

Selected Service items

Page 1 of 1 Remove Paging: ☐ Remove All Displaying 1 - 4 of 4

#	Stock Code	Service Item Description
1	ADMIN	Administration
2	LAB/GEN	Labour General
3	LAB/INST	Labour Installation
4	LAB/MAN	Labour Manufacturing

Edit Contract Task



Details

Notes / Days

Custom Fields

Close

Working Hours: 4

Days From Start: 4

Lag Days: 4

Default Hours: 0.50

Excl Days: Saturday: ☐ Sunday: ☐

Task Colour:

Notes:

Private: ☐

Save And New

Save And Close

Save

Close

Edit Contract Task

Details

Notes / Days

Custom Fields

Category:

All

Save

Please click on the save button BEFORE you change the Category drop down.

Save And New

Save And Close

Save

Close

Contract

Contract Search

Search

Add

Edit

Delete

Clone Contract

Import / Export

Code:

Description:

Archived:

Billing Rate

Contract Task

Contract

Defaults

Page 1 of 1

Remove Paging:

#	Code	Description	Hourly Rate	Rate Type
1	CHG/100	Charge \$100	100.00	Rate 1
2	IS SLA	IS SLA Contract	200.00	Rate 1
3	NONCHG	Non Charge	0.00	Rate 1

Edit Contract

Details Tasks Billing Rate Custom Fields

Code: GEN-MG Description: General Contract- MG

Minimum Billing Amount: 0 Maximum Billing Amount: 0

Start Date: End Date:

Archived: End Time (E/T) Value - active for time logs:

Notes:

Save And New Save And Close Save Close

This is where the contract between the provider of a service and the user' details is created.

It has five tabs and four buttons

Detail Tab - The code and description are important to fill in.

Code - Code of the SLA

Short Description - brief description of the SLA

Minimum Billing Amount - minimum amount the customer and the service provider agree upon

Maximum Billing Amount - maximum amount the customer and the service provider agree upon

Start Date - beginning of the SLA started

End Date - The end of SLA

Archived - SLA will go to archives if the box is ticked

Notes Tab - customer notes regarding SLA

Custom Fields - a user can select from the category

Task Tab

This displays the list of tasks that can be selected for this user contract

Edit Contract

Details **Tasks** Billing Rate Custom Fields

Search Select/Deselect All Edit

Code: Description:

Task Default: Down Pipes

Page 1 of 1 Remove Paging: Displaying 1 - 21 of 21

#	Code	Description	Service Item	Task Hr	Created
1	ACC	Accident	Labour Manufacturing	0.50	☒
2	ADMIN	Administration	Administration	1.50	☒
3	DES1	Site Design		1.00	☐
4	DPIPES	Down Pipes	Labour Manufacturing	2.00	☒
5	FASCIA	Fascia	Labour Manufacturing	1.00	☒
6	FIN	Finished	Labour Manufacturing		☒
7	GUT	Gutter / Spouting 5	Labour Manufacturing	1.25	☒
8	JBL	Head Unit install			☐
9	M001	Measure			☐
10	Meeting	Meeting			☒
11	RAIN	Rain	Administration	1.00	☒
12	ROOF	Roofing	Labour Manufacturing	3.50	☒
13	Star	Starsound			☐
14	test	test	Labour General		☒

Save And New Save And Close Save Close

Search button - to search for existing tasks

Select /Deselect All button - selects all available tasks or unselect all the tasks

Billing Rates Tab

SLA rates selection

Edit Contract

Details
Tasks
Billing Rate
Custom Fields
Close

Search
Select/Deselect All

Code:
Description:

Billing Rate Default:
Non Charge
Potential Billing Rate:
Charge \$100

Page 1 of 1
Remove Paging:
Displaying 1 - 3 of 3

#	Code	Description	Rate	Created
1	CHG/100	Charge \$100	100.00	☒
2	IS SLA	IS SLA Contract	200.00	☐
3	NONCHG	Non Charge	0.00	☒

Save And New
Save And Close
Save
Close

Search button - to search for existing billing rates

Select / Deselect All button – Selects all available billing rates or unselect all billing rates

Billing Rate Default - Select from the list the defaulting billing rate when this contract is selected

Potential billing rate - Select from the the list the defaulting potential billing rate when this contract is selected

Custom Fields Tab

Edit Contract

Details

Tasks

Billing Rate

Custom Fields

Category:

All

Save

Please click on the save button BEFORE you change the Category drop down.

Save And New

Save And Close

Save

Close

Defaults

Contract Search

Search

Add

Edit

Delete

Clone Contract

Import / Export

Code: Description: Archived:

Billing Rate

Contract Task

Contract

Defaults

Charge Travel Fees: ☒

Charge Toll Fees: ☐

Contract:

Travel Bill Type:

Distance

Time

Task:

Distance Rate:

Billing Rate:

Service Item:

Potential Billing Rate:

Travel Item:

Time Rate:

Toll Fees Item:

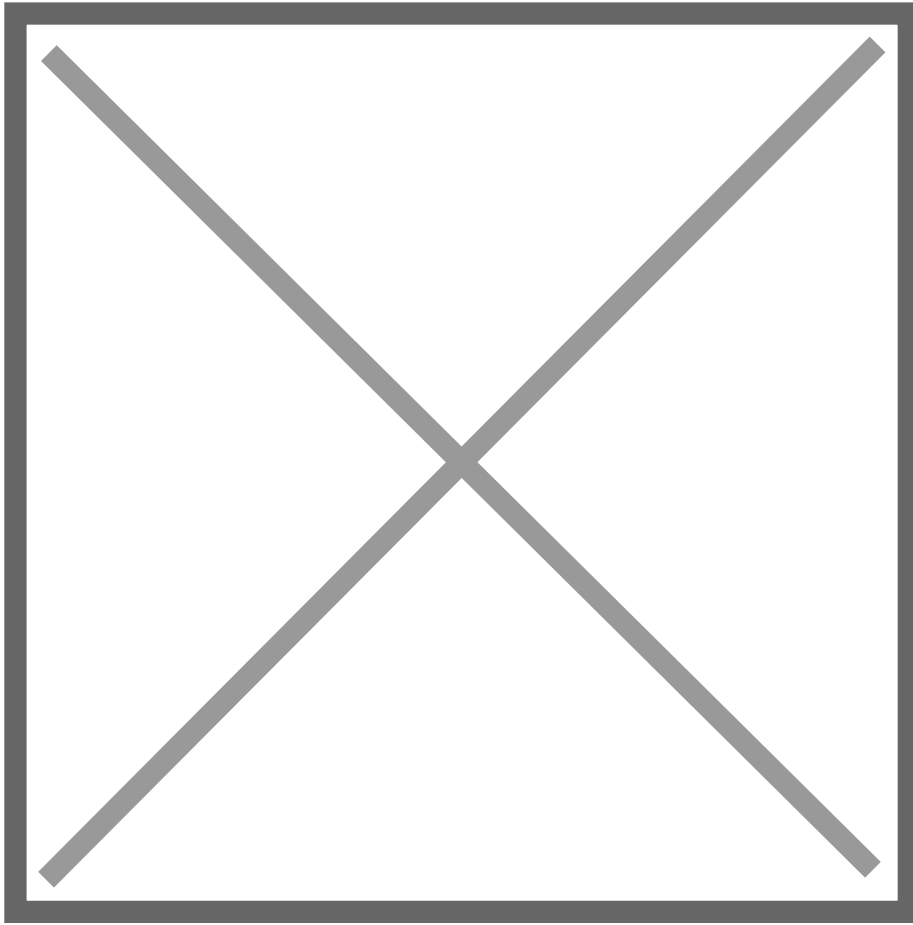
Time Travelled:

Toll Value:

Distance To:

Save Defaults

Import /Export Contract



The file to be imported must be in a CSV format.

Click on the Select Files... button to open the navigate window allowing the user to navigate to the file to be imported.

Once the desired file has been located either double click on the file or click the Open button.

Now click on the Upload button. If the upload was successful a window will appear confirming that the upload was successful. Click Ok.

The Import button now becomes enabled allowing the user to click on the Import button to import the file.

An Import Report will open displaying any errors in the import or displaying the successful import status.

Please Note :

The column headings can be left in the import file providing that the heading are as per the sample below.

Import File Layout

All items in RED are required fields.

No	Heading	Value
1	Code	CONTRACT001
2	Description	Contract Description 001
3	Minimum Billing Rate	1000
4	Maximum Billing Rate	3000
5	Start Date	2015-09-11
6	End Date	2016-09-11
7	Archived	0
8	Notes	This is a note
9	Task Default	Task Code
10	Billing Rate Default	Billing Rate Code
11	Tasks List	Task Code Task Code Task Code
12	Billing Rate List	Billing Rate Code Billing Rate Code