

Contract Maintenance Setup

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The Time logging setup is done under the contract maintenance menu

There are 3 setups required:

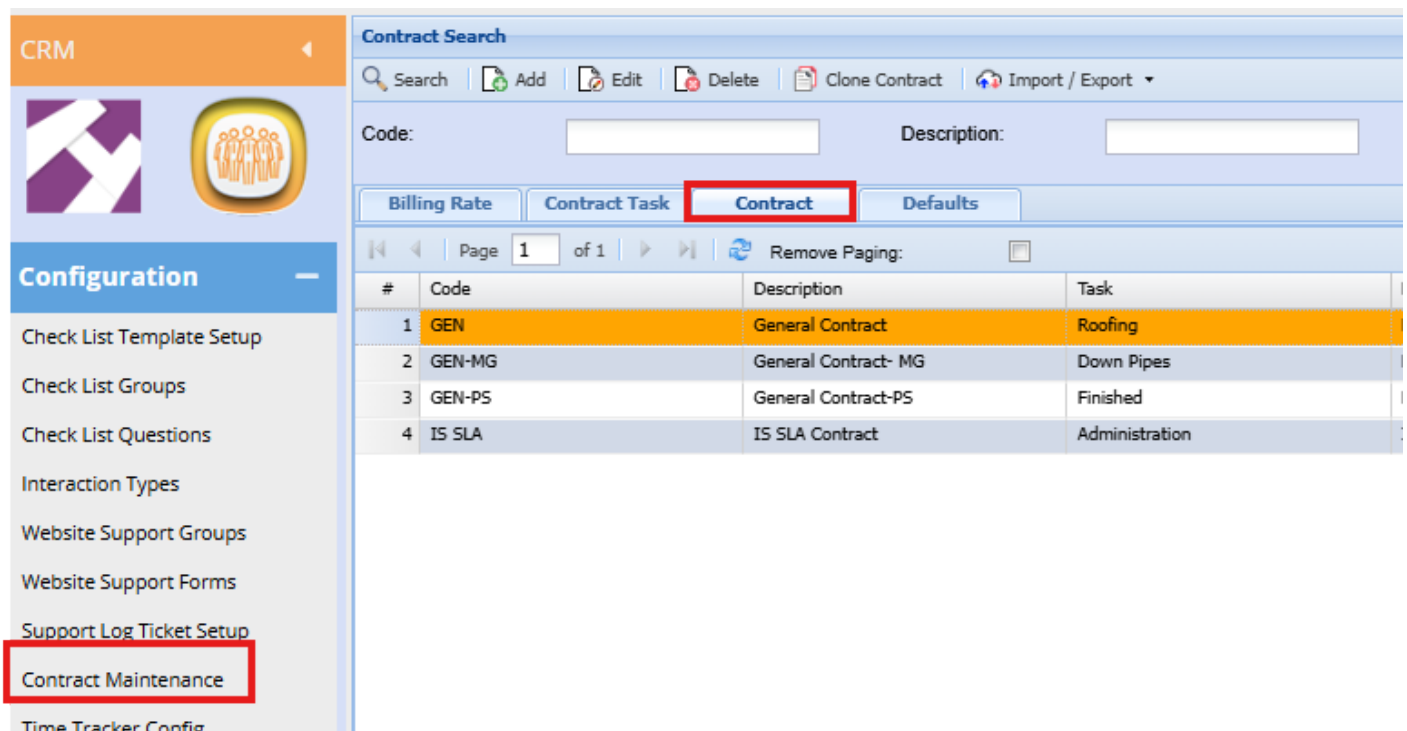
1. The contract
2. The tasks
3. Service items
4. Billing Rates

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 contract tasks, and a 'Contract' tab highlighted in red.

#	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

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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

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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	☐

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**

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#	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

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#	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	

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