Efficiency

Contract Management Manual

Version 4.6

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Contract Module – Set up

First Steps

Prior to using the Contract Module please check that the following areas of Efficiency are already set-up:

- Supervisor
- Operating Divisions
- Branches
- Warehouse
- Executives
- Security
- Users
- Functional Security

Now you can set-up the Contract Specific codes and Flags. These areas are explained in detail within this manual. For any other set-ups required, please refer to the relevant manual.

Contract Module Codes and Flags

The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

Code: 00000
Description: Default record of

It is recommended to keep at least one default record in each table.

These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

Mandatory or Strongly Recommended	Contract Status	Corporate Level
	Contract Type	Corporate Level
	Contract Category	Corporate Level
	Contract Charge Group	Corporate Level
Optional i.e. Default value may be used	Contract Profile Group	Corporate Level
	Contract Profile Item	Corporate Level
	Contract Defaults	Operating Division Level
	Contract Transaction Category	Corporate Level
	Contract Transaction Type	Corporate Level
	Contract Transaction Status	Corporate Level

Site Specific

In this category the tables are designed for site-specific purposes and some of them may be mandatory or simply for secondary information.

Codes and Flags

Contract Type

The Contract Type codes are intended to group the Contracts into Type and type Category classification.

Contract Type tables and Fields

The Contract Type codes are maintained in the Contract Type Code Table (cntrtype), i.e. Prepaid Support Contract, On Site Warranty Contract, Lease Contract etc

Contract Type Category Table (cntrtypc), i.e. In-house Support, Warranty, Lease etc, groups these codes.

The data in these tables should be designed to address the needs of the **entire corporation.**

Contract Type Category fields in table CNTRTYPC

Field Name	Field Description
Type Category Id	A unique identification code.
Description	The description of the type category

Contract Type Code fields in table CNTRTYPE

Field Name	Field Description
Type Id	A unique identification code for the type
Description	The description of the type
Type Category	A unique identification code for the type category

The data in the Contract Type Category table must exist before entering data in the Contract Type Code table.

Contract Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Contract Type Data Example

Contract Type Category Codes

Category Id	Description
00000	*Default Contract Type Category*
WARR	Warranty Contracts
SUPP	Support Contracts
SERV	Service Contracts
LEASE	Lease Contracts

Contract Type Codes

Type Cat Id	Type Id	Description
00000	*00000*	*Default Contract Type*
WARR	INHOUSEW	In-house Warranty
WARR	ONSITEW	Onsite Warranty
SUPP	SUPP_PP	Prepaid Support Contract
SUPP	SUPP_FX	Fixed Value Support Contract

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records

Contract Status

The Contract Status code is used to group the Contract records by their statuses, i.e. Active (Open), Closed etc.

Contract Status Tables and Fields

The Contract Status data is maintained in the Contract Status (cntrstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Contract Status fields in table CNTRSTAT

Field Name	Field Description
Status Id	A unique identification code.
Description	The description of the contract status

Contract Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended
- The codes of ‘A=Active’, ‘NA=Not Active’ and ‘C=Closed’ must exist in the table at all times.

Contract Status Data Example

Contract Status Codes

Status Id	Description
00000	*Default Call Status*
A	**Active**
C	**Closed**
NA	**Not Active**

Key
Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records

Contract Category

The Contract Category code is used to group the contract records by their current category.

Contract Category Tables and Fields

The contract category code is maintained in the contact Category Code Table (cntrcat).

The data in this table should be designed to address the needs of the entire corporation.

Contract Category fields in table CNTRCAT

Field Name	Field Description
Category Id	A unique identification code.
Description	The description of the contract category

Contract Category Hints and Tips

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Contract Category Data Example

Contract Category Codes

Status Id	Description
00000	*Default Contract Category*
HW	Hardware
SW	Software
UP	Annual Upgrade

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records

Contract Transaction Category

The Contact Transactions Category code is used to group the Contact Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different datawindow objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Contact Transaction Category Tables and Fields

The Contact Transaction Category data is maintained in the Contact Transaction Category (conttrnc) table. The data in this table should be designed to address the needs of the entire corporation.

Contact Transaction Category fields in table CONTTRNC

Field Name	Field Description
Category Id	A unique identification code.
Description	The description of the Transaction Category

Contact Transaction Category Hints and Tips

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Contact Transaction Category Codes

Type Id	Description
00000	*Default Type*
C1	Category One
C2	Category Two

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records

Contact Transaction Status

The Contact Transactions Status code is used to group the Contact Transactions records within the Status Groups

Contact Transaction Status Tables and Fields

The Contact Transaction Status data is maintained in the Contact Transaction Status (conttrns) table. The data in this table should be designed to address the needs of the entire corporation.

Contact Transaction Status fields in table CONTTRNS

Field Name	Field Description
Status Id	A unique identification code.
Description	The description of the Transaction status

Contact Transaction Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of ‘00000’ is recommended

Contact Transaction Status Codes

Status Id	Description
00000	*Default Call Status*
C	**Closed**
A	**Active**

Key

Abc: This highlights the typical recommended records.
Abc: This highlights the mandatory or system dependant records.

Contract Module – Maintenance

Contract Master

The Contract Master Tab is used to create a new record or to locate the existing contract record in order to change the data or to perform various functions on the tab folder.

The contract master details are maintained in the Contract Master (Contract) table.

How to Find A Contract Record

There are three ways of finding an existing record:

1. On Screen Search
2. Search by Standard Search Engine
3. Search by Enhanced Search Engine

On Screen Search

You can find the existing contract record using any combination of the following fields:

- Contract Category
- Contract Status
- Contract Type

You should always type in at least 2 or 3 letters of the search name. Click on the drop down arrow or press the <F4> key.

The pre – keyed in letters will act as an instant filter and the system will display you a drop down pick list of the contracts starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required name and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the contract's data On the other hand if you had clicked on the pick list then the selected data will de displayed on the field. Now either click on any other field at the top section of the window or simply press the tab. The contract's data will be displayed as a previous selection.

Note: Your access to some contracts may be limited by your current access privileges.

Filter Contract IDs

If you wish to filter the content of the Contract Id Drop Down List Box, first enter the filter values in one or more of the following fields:

- Operating Division
- Contract Status
- Contract Category

Filter Contract Descriptions

If you wish to filter the content of the Contract Description Drop Down List Box, first enter the filter values in one or more of the following fields:

- Operating Division
- Contract Status
- Contract Category

Search by Standard Search Engine

When the Search button was clicked the search engine window is displayed:

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked, the matching results set will be displayed in the second window.

Highlight the required record and click on the OK button to return to the Contract window with the selected contract record.

If a contract last name fully or partially was entered, in the contract screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Search by Enhanced Search Engine

If the ‘Contract Search Engine Stays Open’ entry was set to Yes in the Contract section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Contract Entry Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list.

Contract search engine can be seed to a specific contract status.

The Contract section of the User Options has a new item. Select a contract status to seed or leave it blank for the user to select the status during search.

Contract Search Engine Seed Stat Id = contract status value

How to Edit an Existing Contract Record

You can alter any information on the window also regulated by the edit privileges, granted to you.

Once the editing is finished simply click on the <SAVE> button.

How to Create a New Contract Record

When you are ready to create a new record click on the <NEW> button.

If the system was set to an “AUTOMATIC” id creation mode a system generated sequential number will be displayed in the ID field. Otherwise enter a unique identification code for this contract.

The AUTOMATIC Id assignment is recommended.

Your cursor will be moved to the Description field so that you can start entering the new data.

Contract Master Data Field Attributes

The data fields may carry various attributes:

<u>Key Fields</u>
The labels for these fields are presented in dark blue.

<u>Mandatory Fields</u>
You must enter a value in such fields. They are presented with a very distinctive colour (usually in light blue).

<u>Functional Fields</u>
The cursor will change from an “Arrow’ to a “Cross’ when over such a field. Double click on these fields and usually a related utility will pop-up, i.e.

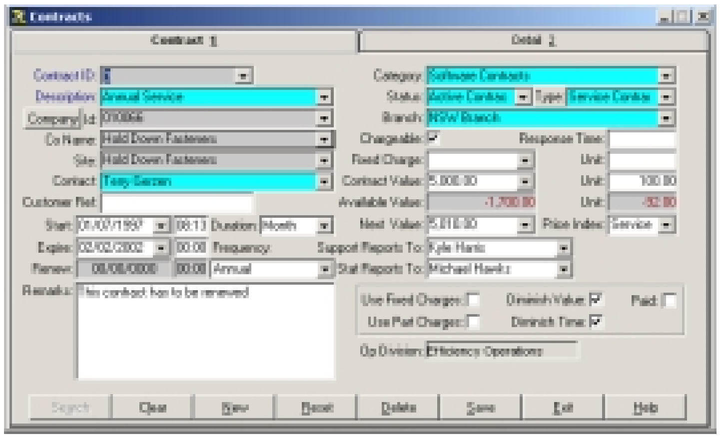
clock, calendar, or link to another module using values that field.

Audited Fields
There is no visual attribute to tell you that the field is being audited. However, if you have such a field, simply double click on it. You will see a detailed table showing the complete change audit for the values that had been altered in this field.

No Enter fields
Displayed in grey colour. The grey colour indicates that the data entry on the field is disabled. In some cases, this is a temporary situation; in other cases, it is permanent.

Contract Tab Folder

The Contract Tab Folder is designed to maintain the Contract Module.



Contract Master Data Fields

The user can maintain or read the following fields:

Contract Id: A unique identification code for the contract.

Description: The description: of the contract.

Company and Contact
Each contract belongs to a Company Site and assigned to a contact (employee) of this site.

You can click on the Company button to activate the company search engine or use the dropdown look up list to locate the company.

Company Id: The company id for the contract.

Co Name: Company name for the contract.

Site: Company site for the contract.

Contact: The contact (employee) that signed the contract.

Customer Reference: The customer's reference number for the contract.

Start: The contract start date and time. OPTION: Calendar.

Duration: The contract duration in days.

Expire: The contract expiry date and time. OPTION: Calendar.

Renew: The contract renewal date. The Start date and the duration calculate this.

Frequency: The renew frequency of the contract.

Remarks: Contract Comments and Remarks. OPTION: Zoom

Category: The contract category.

Status: The contract status.

Type: The contract type id.

Branch: The branch that owns this contract.

Chargeable: 'Y' if the contract is chargeable.

Response Time: The response time (in hrs) undertaken by the contract.

Fixed Charge: The fixed charge value if applicable. OPTIONS: Calculator.

Unit: The charge unit for the fixed charges. Usually a factor of hour or 1.

Contract Value: The contract total value. OPTIONS: Calculator.

Available Value: The available value for this contract. This is automatically reduced if diminish value is enabled for the contract based on support or service activity.

Available Unit: The available unit for this contract. This is automatically reduced if diminish time is enabled for the contract based on support or service activity.

Next Value: The next contract value that is available for the renew process. This value is updated by the Contract Bulk Price Update utility

Contract Renewal

Any contract renewal process including the Bulk Billing utility now uses the Next Contract Value for the renewal and the billing calculations.

If the Contract Bulk Price Update was not run before the renewal or bulk billing process then the current contract value (= next contract value) is used.

Price Index: Contract Values can be updated in a bulk mode.

3 types of price indexes achieve this. Each contract must belong to one of these index types

Index	Code	Function
Fixed	F	Value change manually
CPI	C	Value changed by CPI percent
Service Index	S	Value changed by user defined new service index increase percent.

Support Reports To: The person's name to indicate where the support reports are to be delivered.

Stat Reports To: The person's name to indicate where the contract status reports are to be delivered.

Use Fixed Charges: 'Y' indicates that each support or service charge will include a fixed charge.

Use Part Charges: 'Y' indicates that each service charge may include chargeable parts.

Diminish Value: Tick to diminish contract value.

Diminish Time: Tick to diminish contract time value.

Paid: Place a tick if the contract has been paid.

OP Division: The operating division this contract belongs to. This defaults to the division the log-on executive belongs to.

Command Buttons

Search
Activates the search engine for Contract module.

Clear
Clears the entire window so that a new search can be initiated. If this button was pressed during a new record creation or editing, the "save, yes-no?" dialogue box will require a confirmation of the action.

New
Creates a unique system number for the contract and sets the cursor on the Description field so that the new data can be entered.

Reset
This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Save
Press here to save the values on the screen (temporary) to the database (permanent).

Delete
If you click on this button one of many things may happen depending on the configuration of your system and your current privileges.

4. Nothing happens, you do not have enough privileges to delete the record.
5. Systems response to request with a confirmation dialogue box, when confirmed one of many things may happen:

   2.a If the "Soft Delete" option was put on by the supervisor, a dialogue will capture your reason for requesting the deletion of the record and sets the colour red on the text so that all the other users will know that this record is going to be deleted by the supervisor.

   2.b. If the standard delete function is enabled, based on your privilege, system will attempt to delete the record and all of its children records.

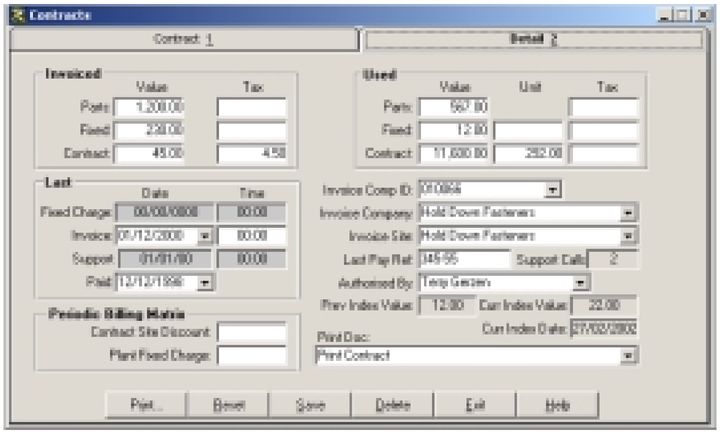
   2.c. If the campaign is used by any other system, such as Order entry or Support module etc, the deletion will be rejected.

Exit
Closes the complete tab folder.

<u>Help</u>
Activates the help screen related to this section.

Contract Details Tab

The details tab maintains the contact details, such as various dates and values.



Data Fields

The following data fields are available on this tab.

Invoice Comp Id: The company id for the company receiving the invoices.

Invoice Company: The company name receiving the invoices.

Invoice Site: The company site receiving the invoice.

Last Pay Ref: The last pay reference (i.e. cheque no.) of the contract.

Authorised By: The person (contact) id that authorised the contract on behalf of the contract company.

Support Calls: No of support calls.

Print Doc: The template to use for printing this contract.

Previous Index Value: The previous service index value as percentage.

Current Index Value: The current service index value as percentage

Current Index Date: The current service index date

<u>Invoiced Values</u>

Parts Value: The total value of the invoiced parts.

Parts Tax: The total tax component of the invoiced parts.

Fixed Value: The total value of the invoiced fixed charges.

Fixed Tax: The total tax component value of the invoiced fixed charges.

Contract Value: The total value of the invoiced contract value.

Contract Tax: The total tax component of the invoiced contract value.

<u>Last Action Values</u>

Fixed Charge Date: Fixed charges set-up date.

Fixed Charge Time: Fixed changes set-up time.

Invoice Date: The date of the last invoice for this contract. OPTIONS: Calendar.

Invoice Time: The time of the last invoice for this contract.

Support Date: Last support call date.

Support Time: Last support call time.

Paid: The last pay date of the contract fees. OPTIONS: Calendar.

<u>Used Values</u>

Parts Value: The total value of the parts used to date.

Parts Tax: The tax component of the parts value used to date.

Fixed Value: The fixed charge value used to date.

Fixed Unit: The number of fixed charge units used to date.

Fixed Tax: The tax component of the fixed charges value used to date.

Contract Value: The value used to date.

Contract Unit: The total units used to date.

Contract Tax: The tax component of the value used to date.

<u>Periodic Billing</u>

If there is a value in the following fields the Periodic Billing utility will automatically apply to the base rate of all the plants of the contract.

Contract Site Discount: Discount percent to apply the base rate

Plant Fixed Charge: Fixed value added to the base rate for each plant

Contract Pop Up Menu Options

From the Contract Module Tab the user may right mouse click in any gray area on any Tab to obtain a list of additional functions or enquiries available;

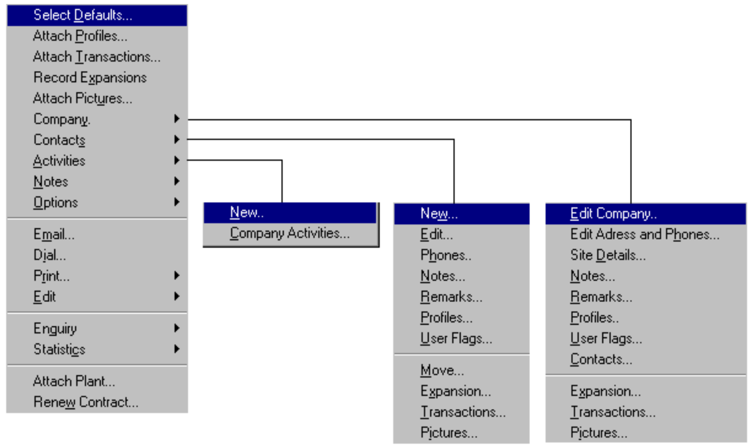
<u>Select Defaults</u>
Information as set up in the selected default will be updated into the current contract record automatically during a new contract record creation as detailed under the Module Defaults topic.

<u>Attach Profiles</u>
Each contract record can have many profile items attached to it.

<u>Record Expansions</u>
Additional information can be created for each Contract Record and accessed instantaneously as described under the Module Expansions topic.

Attach Transactions
Each contract record can have many transactions attached to it as described under the Module Transactions topic.

Attach Pictures
Each contract record can have pictures, documents, audio and video objects as described under the Pictures topic.



Company Sub Menu

Edit the company and its various features and attributes, which have the contract.

Edit Company
Edit Contract's company module.

Company – Address and Phones
Edit the company address and phones.

Company – Site Details
Edit company site details.

Company – Notes
Edit the company notes

Company – Remarks
Edit the company remarks

Company – Profiles
Edit the company profiles

Company – User Flags
Edit company user flags

Company – Contacts
List and edit company contacts

Company – Expansion
Access and edit company expansion records if they have been set-up

Company – Transactions
Access and edit company transactions

Company – Pictures
List and Edit the company pictures

Contacts Sub Menu

Edit the employee (contact) and its features and attributes assigned to this contract.

Contacts – New
Create a new company contact.

Contacts – Edit
Edit the current company contact.

Contacts – Phones
Edit company contacts phone numbers.

Contacts – Notes
Edit the company contacts notes.

Contacts – Remarks
Edit the company contacts remarks

Contacts – Profiles
List and edit the company contacts profiles

Contacts – User Flags
Edits the company contacts user flags

Contacts – Expansion
List and edit the company contacts expansion records

Contacts – Transactions
List and edit the company contacts transactions records

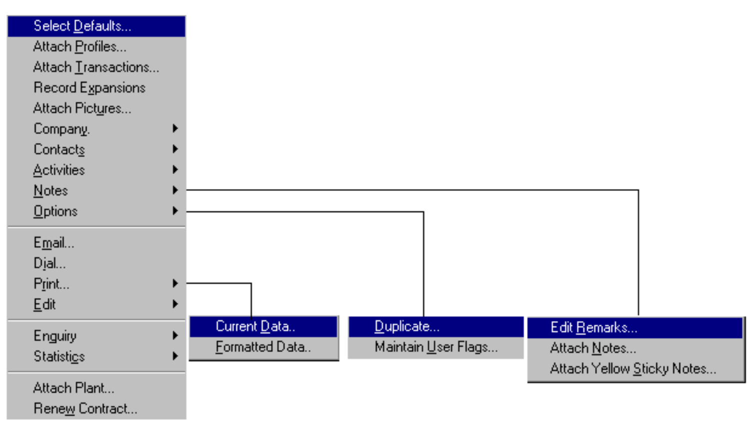
Contacts – Pictures
List and edit the company contacts pictures

Activities Sub Menu

Activities – New
Create a new activity for the company

Activities – Company Activities
List company activities.

Activities – To Do List
Edit to do list for the company



Notes Sub Menu

Edit Remarks
Remarks attached to each Contract Record can be edited, added or deleted as described under the Module Remarks topic.

Attach Notes
Unlimited number of secured, date time stamped and sorted notes can be attached to each Contract Record as described under the Module Notes topic.

Attach Yellow Sticky Notes
Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each contract record as described under the Yellow Sticky Notes topic.

Options Sub Menu

Duplicate
A Contract Record can be duplicated and another Contract record created with the same or similar attributes as described generally under the Record Duplication topic.

Maintain User Flags
Up to 5 User Flags can be added to each Contract record as generally described under the topic of User Flags Maintenance.

Email
This will activate the Email facilities. Refer to the Email topic for general information.

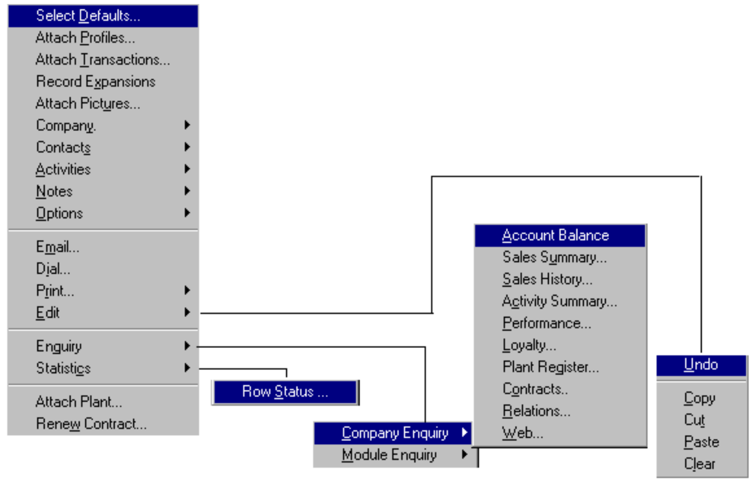
Print Sub Menu
The screen print or to print a pre-designated report can be processed here.

Print Current Data
Click on this to print the active data window. The Print Function details how to print and the available options.

Print Formatted Data
Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current contract record. The Print Function details how to print and the available options.

Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear, and Paste functions at the field level.



<u>Enquiry Sub Menu</u>

Enquiry – Company Enquiry - Account Balance
Activates account balance screen for the company

Enquiry – Company Enquiry – Sales Summary
Activates sales summary screen for the company

Enquiry – Company Enquiry – Sales History
Activates sales history for the company.

Enquiry – Company Enquiry – Activity Summary
Activates company activity summary screen.

Enquiry – Company Enquiry – Plant Register
Activates the company plant registry search screen.

Enquiry – Company Enquiry – Contacts
Activates company contacts search screen.

Enquiry – Company Enquiry – Relations
Activates company relation screen

Enquiry – Company Enquiry --Web
Activates Internet explorer screen.

<u>Statistics Sub Menu</u>

Statistics – Row Status and Row Count
Click on one of the above menu entires display the status of the record.

Renewing a Contract

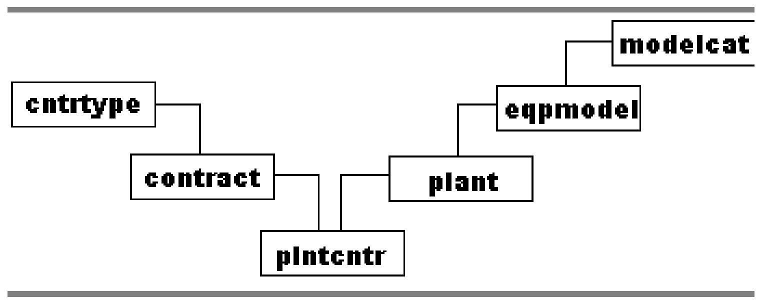
Select <Contract Renew> option from right click menu will renew the contract. It will increment the expiry date of the contract by the specified duration and record the date and time of the renewal in the Renew field.

The Contract available value and available units will also increase by the contract value and contract units specified.

If the contract has not expired, the system will prompt the user if they wish to add the contract value and units to the available value and units.

Periodic Billing

The standard Plant and Contract Relations is shown below:



The Contract Plant Matrix will enable the periodic Billing based on a predetermined matrix.

Two specific fields on the contract details tab on the contract maintenance window. If there is a value in the field it will automatically apply to the base rate of all the plants of the contract.

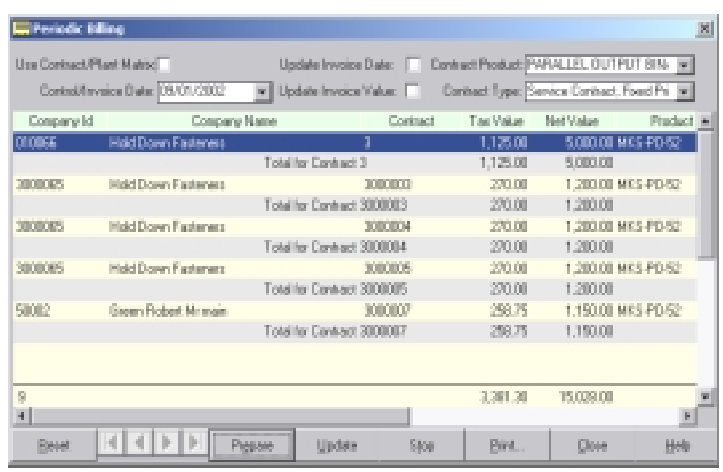
<u>**Column Name**</u>	<u>**Description**</u>
Contract Site Discount:	Discount percent to apply the base rate
Plant Fixed Charge:	Fixed value added to the base rate for each plant

Periodic Billing Utility

Select Periodic Billing option from the Contract>Prepare>Transaction Menu.

The Periodic Billing function produces the periodic invoices for the selected contracts as well as the contract/plant matrix.

The list then can be outputted to the assigned directory to create a text file for the invoicing from the financial systems.



The text file is created by the nominated file prefix and location of the AR file of the Host section of the shared options. The contract text file will have the 'C' addition on the file name to distinguish it from the service invoice text file.

When the Use Contract Plant Matrix box was unchecked user must select a corresponding product record (the tax value is stored in the product record) and a valid contract type.

If this check box was checked then the selection will be based on the existing contract-plant matrix. In this case, the product and contract type records do not need to be selected.

After the selection, entries click on the Prepare button to produce the list based on the Control/Invoice Date grouped by the Contract.

The formulae is used for the selection of the contract records is as follows:

Control Date – Contract Frequency > Last Invoiced Date

If the Update Invoice Date and/or Value boxes were checked, clicking the Update button will update those fields in the contract records. At the same time, a text file for invoicing may be created.

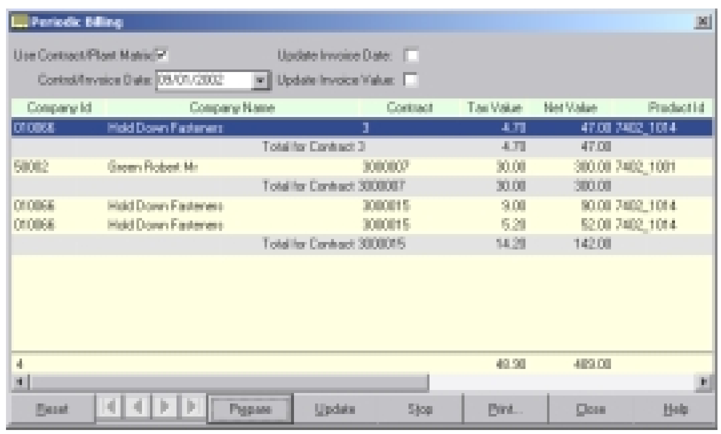
Click on the save button to save the list into a preferred file format.

If the Update check boxes were checked system is updated after the creation of the text file.

Click on Print to print the hard copy of the list

Contract Matrix Billing Calculations

When the contract plant matrix was used to calculate the contract bill values for the following sheet this logic is used



<u>**Operator**</u>	<u>**Calc**</u>	Formulae
		Model Base Rate
	Less	Plant Discount (per Plant Matrix) (If the plant discount is 0.00% then no discount applies, if it is blank then the site discount applies)
OR	Less	Site Discount (per contract)
	Plus	Fixed Charge (per Plant Matrix) (If the fixed charge is 0.00 then no charge applies, if it is blank then the contract fixed charge applies)
OR	Plus	Fixed charge per Plant (per Contract) = Plant Charge Net Value
	Plus	Tax Value per Plant (per contract) = Plant Charge Total Value

Periodic Billing Text File

The following options will produce a text file from the Periodic Billing utility.

Create Periodic Billing Text File: Yes = Creates the list of contracts to be billed in a text file of which name and location are set under the Support and Service section for the AR Text file.

Periodic Billing Text File Format: Select the text file format either Efficiency or Host. Host system must be connected and valid for the Host option.

Contract and Plant Matrix

The Contract Matrix (cntrmtrx) and Plant Matrix (plntmtrx) tables are maintained to establish two level matrixes so the Plants under certain contracts can be billed periodically at predetermined charged rates.

The Contract Matrix maintained in the cntrmtrx table and allow to set a net base rate value for the:

- Contract Type;
- Model Category; or
- Plant Model;

combinations.

A tax percentage value can be set for the charge value.

Each combination in the matrix table must be attached to a product so that the periodic invoicing can be produced.

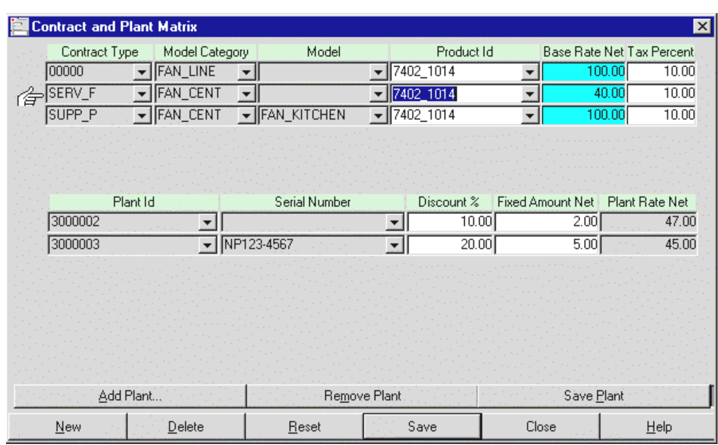
In some cases this matrix needs to be extended to the individual Plant level. For this purpose, another table, Plant Matrix (plntmtrx) allows the user to set the special discount and the fixed charge rate for the individual plant item.

Each record on this table is linked to the Contract Matrix (cntrmtrx) table and extended via the plant id.

The plant charge value is a net value and calculated as follows:

Plant Charge net value = Base Charge – Discount + Fixed Charge

A maintenance window that is accessed from the Charges option of the Contract Menu allows the user to maintain the Contract Matrix and its extension, Plant Matrix.

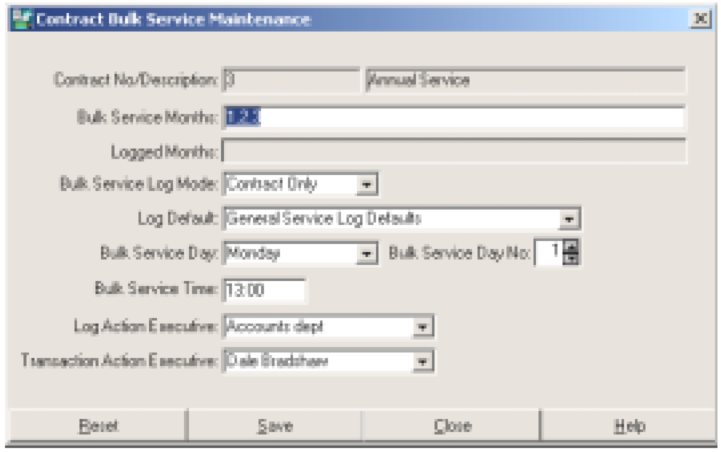


The rates are rounded to the system's rounding value.

Contract Bulk Service Maintenance

The Bulk Service options is accessed from the pop up menu of the contract module.

Task Manager has a function to generate bulk service logs based on the data entered in the contact records.



Data Fields

Bulk Service Months: Double click on here to select range of months for the service. No of months (January = 1) will be listed, separated by commas

Logged Months: List of months (no's) that were logged by the Task Manager

Log Mode: You can select one of two options.

1. Contract Only: Create Log and one Transaction for the contract.
2. Plants All: Create Log for the Contract and Transactions for all the plants of the contract.

Log Default: Select a Log default that is to be used of the log.

Bulk Service Day: The Name of the day for the service.

Bulk Service Day No: The number of the day of the month for the service. For example

- 1 = First <day name> of the month
- 3= Third <day name> of the month
- -1 = Day name of each week.

Bulk Service Time: Enter the time for the service.

Log Action Executive: Executive who will be assigned to the Log.

Trans. Action Exec: Executive who will be assigned to the Log Transactions.

<u>Create Mode</u>

The Task Manager can be scheduled to create the periodic service logs based on the data set in each contract.

Contract Price Bulk Update

Contract Values can be updated in a bulk mode.

To achieve this 3 type of price indexes have been introduced. Each contract must belong to one of these index types.

Index	**Code**	**Function**
Fixed	F	Value change manually
CPI	C	Value changed by CPI percent
Service Index	S	Value changed by user defined new service index increase percent.

The Current CPI for the Update value is accessed from the Global section of the Shared Option.

Example for CPI

Status	**Value**	**Next Value**	**Curr Index**	**CurrInd Date**	**Prev Index**
Current	1,000	1,000	3.5	11/11/2001	4.1
Update	1,000	1,040	4.0	28/02/2002	3.5

The Current Service Index for the Update value is accessed from the user input on the Bulk Update window and the next contract value is increased by the difference.

Example for Fixed Index

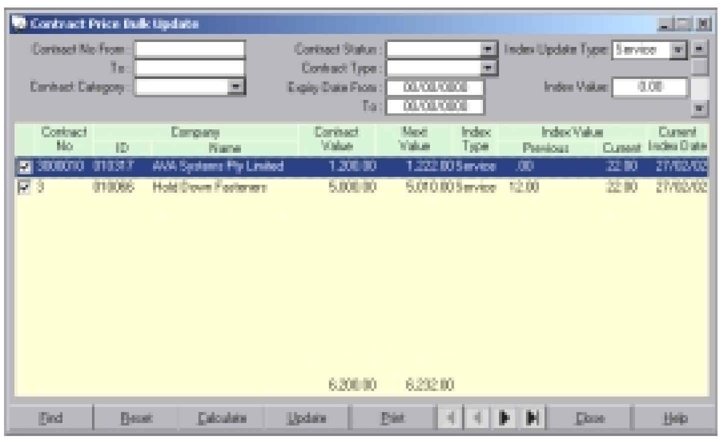
The next value field can be edited manually.

The Renewal and Periodic Billing Update functions will use the Next Value field. The update functions will move the Next Value to the Contract (Current) Value.

NOTE: The values for the Contract Plant Matrix or the Plant Fixed Charges (All used for the periodic billing) are not affected by this utility.

Contract Price Bulk Update Utility

This utility is accessed only by the supervisor from the Data option of the main menu of the supervisor application.



Top section is to set the query criteria and the bottom section is to display the result set.

If the Index Update Type = Fixed was selected the Next Value field has to be entered manually.

The CPI index value is read from the Current CPI item of the Global section of the Shared Options. Before running this utility be sure that the Current CPI value is valid.

All the result set is displayed each line item is being checked for update. You can uncheck any line item that is not to be included in the update.

Click on the Calculate Button to see the calculated results. You can print the result set by clicking on the Print Button.

Click on the Update button to apply the new values to the contracts that have been checked to update.

Contract Renewal

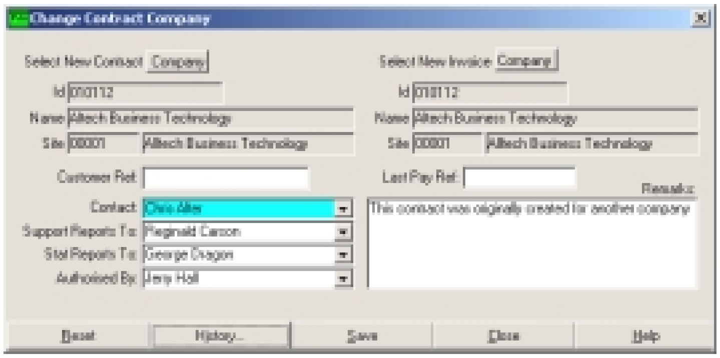
Any contract renewal process including the Bulk Billing utility now uses the Next Contract Value for the renewal and the billing calculations.

If the Contract Bulk Price Update wasn't not run before the renewal or bulk billing process then the current contract value (= next contract value) is used.

Change Contract Company

If contract's company or site or the billing company was changed this utility allows the user to change them.

The Company Reference field was added to the contract master table.



This utility is accessed from the pop up menu of the contract module tab,

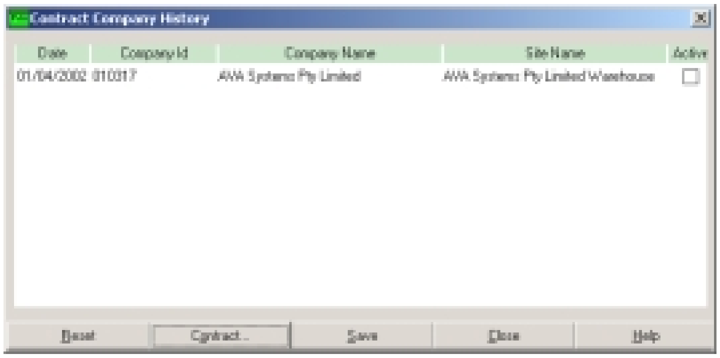
Window displays the existing company details.

Click on the <Company> button for the New Company or the New Invoice company. The standard company search engine is displayed. Select the new company and return to this screen.

Select the contacts, and enter the new Customer Reference and the Last Pay Reference if applicable. You can also edit the contract remarks if required.

The Save button will change the company details on the contract and creates the history record of the previous company contract in the Contract Site Table (cntrsite).

Click on the History button to display the previous companies of the contracts.



Click on the Contract button to return to the Contract Company Change utility window

Charge Type Maintenance

The Support and Service Module is provided with a Special Charges sub module that allows the supervisor to set up various Charge Rates to be used for the Support and Service Contracts and the Service Resolution Activities.

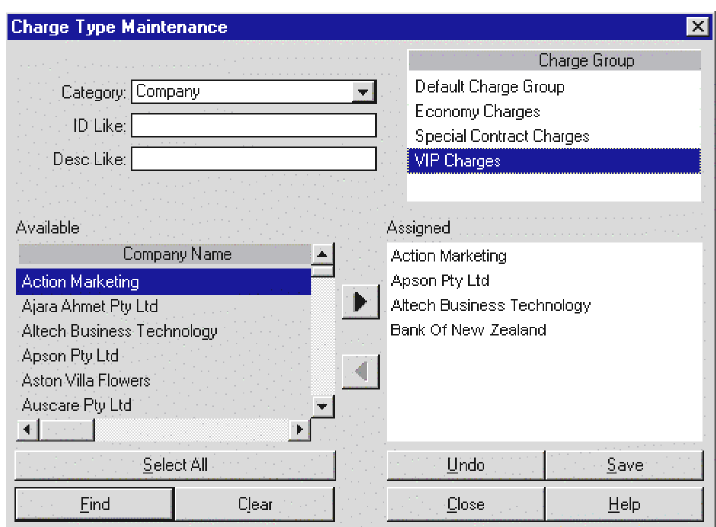
During a Support and Service Activity resolution entry, the applicable charge for the action being taken is automatically calculated for the Executive (by the Executive Group) by checking the Charge Type Matrix in the following order:

- Contract Id
- Contract Type
- Company Site Id
- Company Type
- Plant Model
- **Plant Id**
- Major Key
- Product Id
- Product Category

The charge type maintenance screen will allow you to maintain the charge type.

This option can be accessed from Prepare Module->Module Codes-> Charges -> Charge menu option in contract module, when this option is selected you will be presented with the following screen.

This screen is made of two sections; the left section is to select and list the charge category, right section, lists the groups under the selected category.



Data Fields

Category: Charge type.

ID Like: Select partial of an id to narrow the search.

Description: Select partial of the description narrow the search.

Available: Area to view the available contract types.

Charge Group: List of charge groups in the category.

Assigned: List of assigned the contract to the charge groups.

If you wish to add a contract to a charge group, highlight the contract on the left part of the screen and click on the arrow positioning to the right, this will add the contract to the assigned list, click on save button to save the selection.

To remove the contract from assigned list, highlight the contract in the assigned list and click on the arrow positioning to the left, click on save button to save the changes.

Command Buttons

Left and Right Arrows
Allow you to add and remove contracts from Available and assigned areas.

Select All
Selects everything in the list.

Find
Finds the selection criteria.

Clear
Clears the selection criteria.

Undo
Deselects the contract type assigned to the charge group.

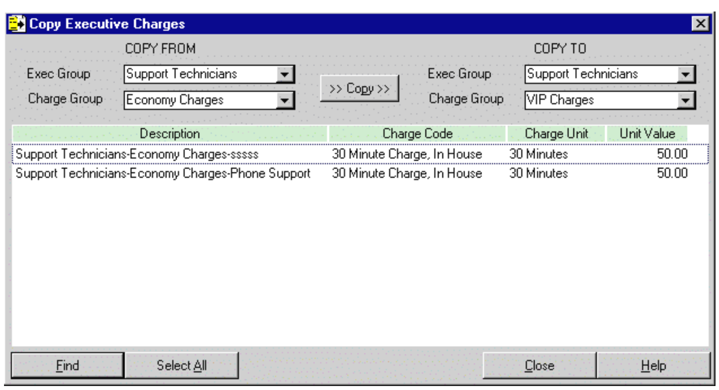
Save
Saves the assigned contract type.

Close
Closes the charge type screen.

Help
Activates help screen relevant to this section.

Copy Executive Charges

The executive charges can be copied from one executive group to another, to access this option click on menu option Prepare Module ->Module Codes -> Charges -> Copy Executive Contract Charges, the following screen will appear.



This screen is made of three parts, Top left part is to select the executive group charges that you wish to copy from, the top right part were to select the executive group charges to copy to. The third part is to view the list of executive groups that you wish to copy from.

Selection Fields

Copy From

Exec Group: Executive group to copy from.

Charge Group: Charge group to copy from.

Copy To

Exec Group: Executive group to copy to.

Charge Group: Charge group to copy to.

Command Buttons

Copy
Copies the selected group.

Find
Finds the selection criteria.

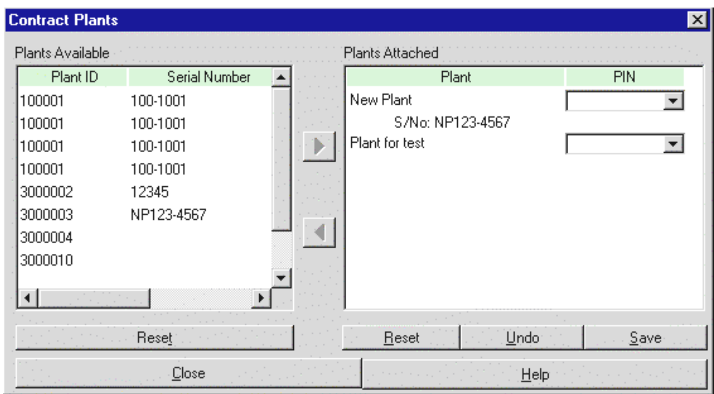
Select All
Selects all the charge groups in the list.

Close
Closes the window.

Help
Activates the help screen relevant to this section.

Contract Plants

Selecting attach plant from right click menu will display the following window, allowing the user to assign plant items covered under this contract.



The list of current plant items associated with this Company and Site and displayed in the Plants Available window. Selecting the Plant and using the Arrow keys will assign the plant items to this contract.

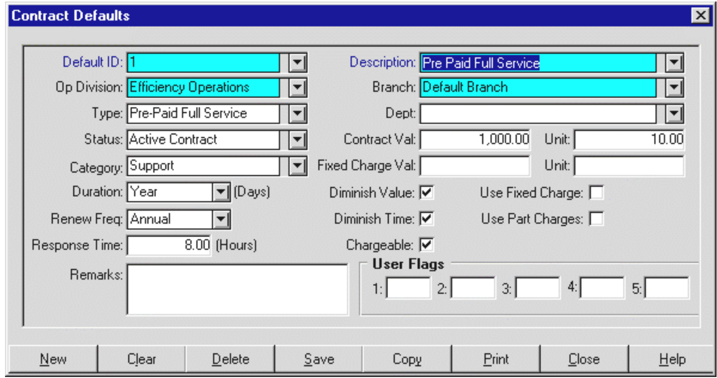
Each plant item can be assigned an existing PIN number if they have already been assigned to the company site.

Contract Defaults

Contract default values are preset field values that populate the window when a new contract is created.

This option can only work if your supervisor has enabled it in the user Options for the user.

Defaults are set up to assist with data entry. The fields are populated with the value set up in the respective fields on the default screen.



Data Fields

Default Id: The contract default template id.

OP Division: Operating division

Type: The contract type identification code.

Status: The contract status identification code.

Category: The contract category identification code.

Duration: The current duration in days.

Renew Freq: The description of the renewal frequency.

Response Time: The promised response time in hrs.

Remarks: The default contract remarks.

Description: The description of the contract default.

Branch: The branch id.

Dept: The department.

Contract Value: The default contract value.

Unit: The contract hour unit.

Fixed Charge Val: The default contract fixed charge value.

Unit: The default contract fixed hour unit.

Diminish Value: ‘Y’ if the contract value is to be diminished.

Use Fixed Charge: ‘Y’ if the contract is based on fixed charges.

Diminish Time: ‘Y’ if the contract time is to be diminished.

Use Part Charges: ’Y’ if the parts used in contract are chargeable.

Chargeable: ‘Y’ if the contract is chargeable.

User Flags 1-5: A user defined flag selected from the profiles table.

Reports and Enquiries

Contract Reports

The Standard Reports topic details the report functions in general

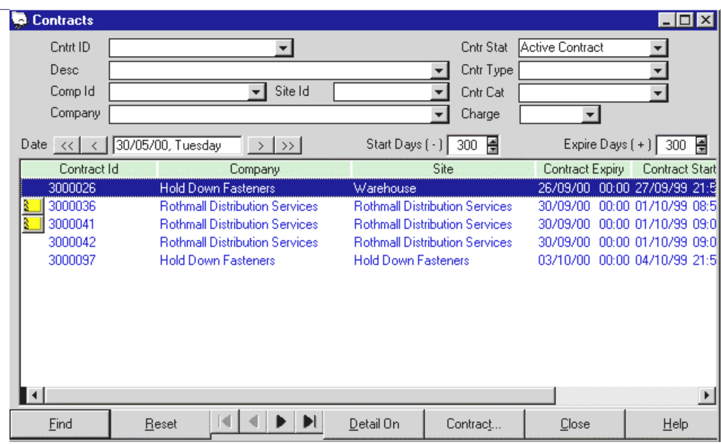
The following is a list of Standard Reports available from the Contract Module:

Report Group	**Report Item**
Contract List:	By Company
	By Type
	By Status
	By Profile
	By Pin
	Data Page
	By ID
Activities:	Activities
Availability:	Availability
	By Expiry Date
Plant:	By Plant

Contracts Enquiry

Contracts Enquiry Window allows the user to access the selected contracts for one or for all companies. Once the contracts are listed, the pop up menu will lead the user to access to all the related information and functions of Efficiency.

This window contains two data windows one is used for Query and the other is used for Listing of the results.



When the window is started the query data window is populated with the default values that were set in the User's preferences.

Once the selections were entered click on the Find button to display the new result set or click on the Reset button to initialise a new search

Command Buttons

Detail On
Click on this button to display the details of each contract

Contract
Click on this button to start the Contracts module for the selected line item.

Pop Up Menu

Right mouse click on a selected line item or pressing Alt+F1 will pop up the Pop Up Menu. Depending on the content of the site licence user can access all the functions and options of Efficiency. The following are typical.

Module
Access to the options and functions of the entire Contracts Module.

Contact
Access the details, functions and options of Employee (Company Contacts) of the selected contract.

Company
Access the details, functions and options of Company and Site of the selected contract.

Activity
Access the details and attachments of the selected activity as well as drilling down the specific activities of the Company, Contact or the module record. The TO Do lists for the Contract is also accessed from this option.

Email
start Email session the email the email address of the contact of the contract.

Filter, Sort
Start Filter or Sort functions.

Print
Print current window, formatted data or save as functions can be selected.

Dial
The auto dial window is displayed by listing all the available phone numbers for the contact of the contract

Enquiry
Depending on the content of the activity record Contact or Company sub menus are displayed from which all the standard enquiries are accessible.