Chapter 4.08: Managing Contracts

Introduction

RMA includes contract options that will allow you to create, edit, and manage contract information on your customers' accounts. This feature can be used in a number of different ways. This document will address all facets of the contract management system so that you can use it effectively in your business.

In addition, it also provides information for our electronic contract that allows you to setup your system to capture contract information on your handheld; save it electronically and be able to send it to your customer at any time.

Overview

It is common to use the contract options in the water delivery industry for equipment. Most equipment rentals will involve the signing of a contract to ensure customer responsibility and allow easy tracking for the company. Creating multiple contract types gives you the flexibility you may need to suit your contract requirements.

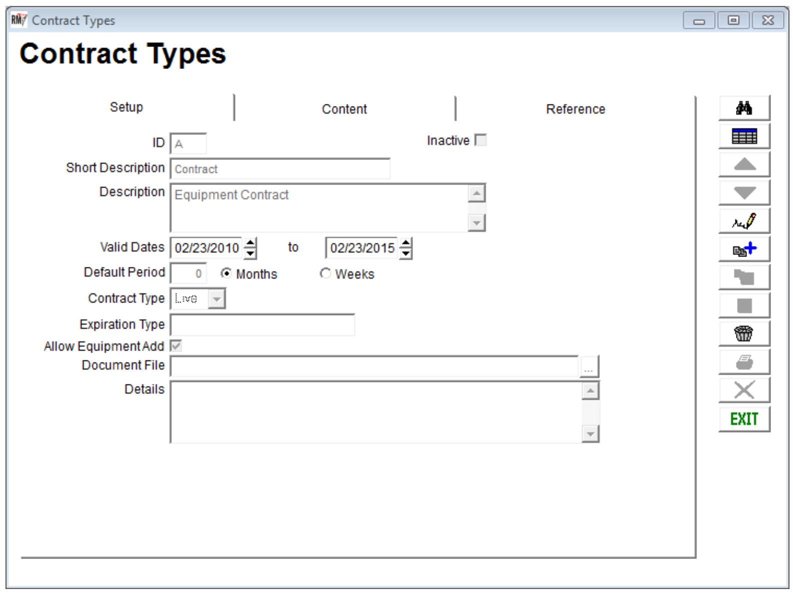
Contract Setup

Prior to setting up your first contract, there are some items that need to be established.

Contract Types

Contract Types will be used each time you set up a contract for a customer. Create the different contract types your company will offer by going to **Lists>Customer Setup Codes>Contract Types**.

Contract Type Codes are used to help easily identify different the type of contract the customer is on. They are assigned to the customer's account directly. Most contract descriptions relate to the length of time the contract will be in effect.



Fields:

ID: Enter the ID of this contract type.

Inactive: Use this to inactivate the contract type if it is no longer needed.

Short Description: Enter a short description of the contract.

Description: This space allows for a more detailed description.

Valid Dates: Enter the date range this contract type will be valid.

Default Period: Enter the length of the contract. The length can be entered in months or weeks.

Contract Type: Select the type of contract, Live or Trial.

Expiration Type: Expiration reason this contract should renew or not.

Allow Equipment Add: Checking this box will allow you to add a cooler to the contract.

> NOTE: Choose the 'Allow Cooler Add' box only if the contract code is to be used to link to a piece of equipment.

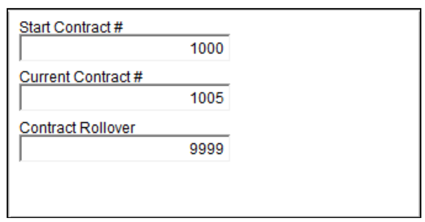
Document File: Located on the server, where the file for this contract is kept.

Details: Specific Details of this customer's contract and terms.

Contract Numbers

Each contract will be assigned to a unique number. A Contract Number Pool must be established under **File>Branch Setup>Customers** before continuing.

Enter the range of numbers that will be used for contracts:

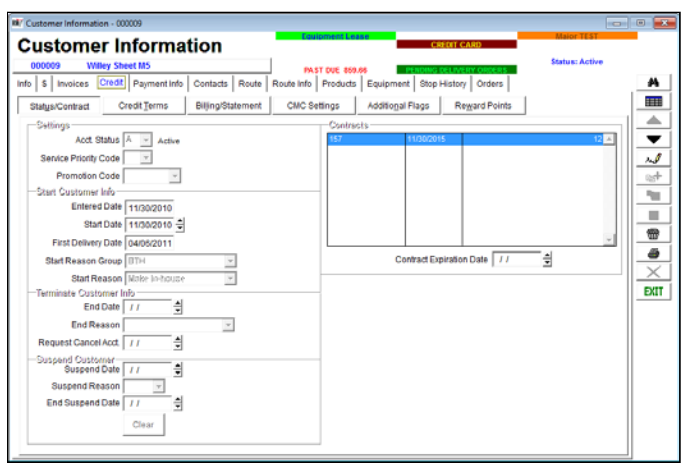


Customer Information - Contracts

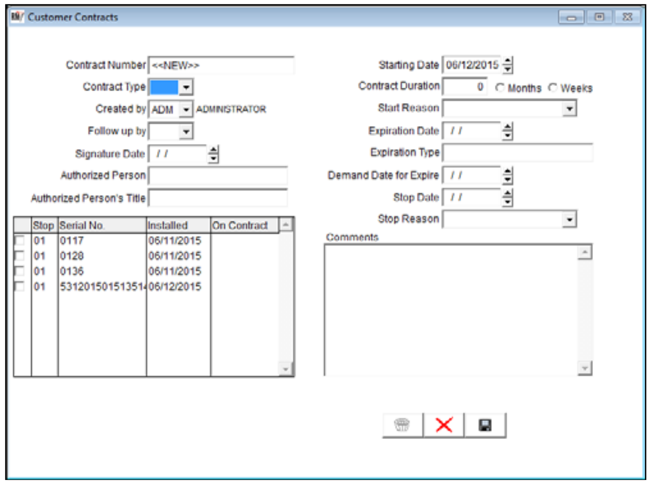
Once the **Contract Types** are created, go to **Customer Information> Credit>Status/Contract** tab.

To add a contract to the account:

1. Select **Modify**.
2. Double-click on **(ADD NEW)** in the **Contracts** section.



3. The **Customer Contracts** screen will be displayed. Enter all of the contract details — refer to 'Fields Explained' below for information on the fields displayed.



Fields explained (Contract):

- ***Contract Number:*** Customer's contract number, this is automatically populated.

NOTE: The Contract Number Pool is managed under File>Branch Setup>Customers tab.

- ***Contract Type:*** The Contract Code that will be used.
- ***Created by:*** The name of the employee who created the contract.
- ***Followed up by:*** The employee that followed up on the contract.
- ***Signature Date:*** The date the contract was signed.
- ***Authorized Person:*** Name of the employee signing the contract for the account.
- ***Authorized Person Title:*** Employee's title that is authorizing the agreement.
- ***Starting Date:*** The date the contract goes into effect.
- ***Contract Duration:*** The duration of the contract.
- ***Start Reason:*** The customer's reason for starting service.
- ***Expiration Date:*** The date that the contract expires.

- ***Expiration Type:*** The expiration reason noted in the setup of the contract type code.
- ***Demand Date for Expire:*** This is the date the customer requests the contract end.
- ***Stop Date:*** The date the contract ended.
- ***Stop reason:*** The reason for ending the contract.
- ***Comments:*** This is an extra field for comments or notes.

4. If applicable, select any equipment that is included on the contract.

	Stop	Serial No.	Installed	On Contract
☐	01	0117	06/11/2015	
☐	01	0128	06/11/2015	
☐	01	0136	06/11/2015	
☐	01	53120150151351	06/12/2015	

5. Click **Save** on the contract screen.
6. Click **Save** on the customer's account to complete the process.

Daily Usage

There are two options to view an existing contract on a customer's account:

1. **Lists>Equipment>Master List (if equipment is on contract):** Browse to the piece of equipment and select the **Rents** tab. The **Contract ID** and **Expiration** is displayed on the top-right corner of the screen — this screen can also be accessed from within the **Products** tab of **Customer Information**.
2. **Customer Information>Credit>Status/Contract:** Double-click on the contract to view it on the screen (Click Modify to make changes).

Reports

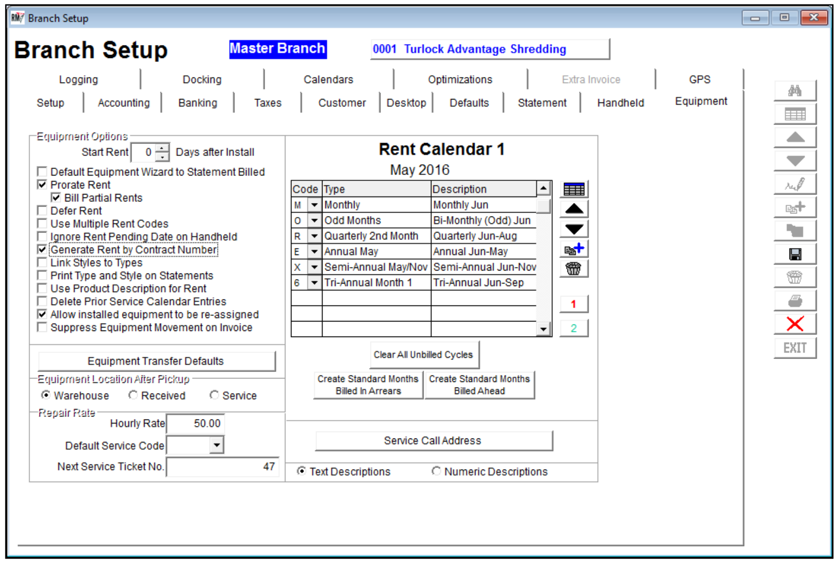
You can view expiring contracts via the Expiring Contract Report.

This can be found under Reports>Management>Expiring Contracts Report.

Rent by Contract (Optional)

In certain European markets, contract numbers are used when generating rentals. If an account has three separate contracts assigned, a rental invoice is generated for each contract, with each invoice listing all of the equipment assigned to each respective contract ID.

This option can be enabled under **Branch Setup>Equipment**, select the option “Generate Rent by Contract Number”.



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Warning

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