

## Spotlight - Contracts Module

Preparation for Spotlight

Preparation if using demo data attached

1. Import Demo Data

2. Login with

Standard ID: sample@hansaworld.com

Passworld: Sample99

3. Change default Module for Login:

Module>>System>>Settings>>Access Groups>>Admin>>Change Line 1 to 'Contracts' and 'Full'

Preparation if creating your own demo data

1. Import Demo Data

2. Login with

Standard ID: sample@hansaworld.com

Password: Sample99

3. Change default Module for Login:

Module>>System>>Settings>>Access Groups>>Admin>>Change Line 1 to 'Contracts' and 'Full'

Also check to ensure Module>>System>>Settings>>Configuration>> Verticals TAB>>Contracts is ticked

4. Setup an Item which can be added to the contract

Item No: 20104 (Or item number of choice)

Description: 1 Year Maintenance/Support Contract

Item Type: Service

Unit: Each

Base Price: 100

SCRIPT:

Standard ERP's Contracts module allows you to easily maintain all of your company's recurring billing needs.

The Contracts module gives you the flexibility to setup a contract when you need them.

ACTION: Select Register>>Select Contracts>>Create>>New Contract>>Customer Field>>Select 001

When a new contract is created, the system captures the Date of Contract, -

ACTION: Move cursor to Date of Contract field

- and all you need to add now is when the contract will take effect.

ACTION: Enter start date (1st day of current month) and end date (after 12 months)

You can also enter billing frequency. To invoice the customer once every 12 months, for example, select "Months" under Period Type and add "12" -

ACTION: Point to "Period Type" select month and add 12

- it's as simple as that!

The invoice will issue once per year. The price should reflect what is owed during that period.

Likewise, to charge monthly, the price should reflect the monthly fee and here, — we enter "1" in the Length field.

ACTION: Point to "Period Type" in Length field

Choosing the "Before Period" option under Invoice, and entering 10 in the Days field will cause an Invoice to be raised ten days before the start of each period.

ACTION: Point to "Invoice" and enter 10 in the Days field

Selecting the "After Period" will cause an Invoice to be raised ten days after the end of each period.

Now that the contract period and frequency have been defined, you can set up all items that need to be invoiced on that recurring basis.

ACTION: Enter Item 20104 in the matrix, enter Qty 1, and then select Accepted, Ok'ed and Save, close record

Once all of the information for contracts is set up, it's easy to generate invoices with a Contracts module maintenance routine.

ACTION Module>>Contracts>>Maintenance Routine>> Create Contract Invoices - point cursor over this. Enter From and To dates to cover your contract and Run.  
On Personal Desktop, open the Invoices register and the newly created Contract Invoice.

This routine can be automated to run at a particular time on a particular day.

ACTION: Show reports menu

As in any other Standard ERP module, you will find a range of useful reports here as well.

With Standard ERP's Contracts module you can see how easy it is to maintain recurring billing and never miss invoicing a customer again!