

# Client Contracts

Here you can create Client Contracts and attach your sites to a specific contract.

You can assign Resources, Sites, Regions & Priorities to a contract and set budget information, sales margins and default Schedule of rates.

The main list as seen below provides important information for each Contract.

Contract Name	Number	Ref.	# of Sites	Sales Labour Mark-Up	Sales Materials Mark-Up	Sales Other Mark-Up
Client 1	C1	ctref	1	15.00		15.00
Client 2	C2		2	20.00		20.00
Client 3	c3	c3ref	3	31.00		33.00

The triple dot button will reveal a dropdown where you can:

1. Export to Excel
2. Set Priorities & Margins

Click **Create** to be directed to the Create Contract Screen.


1. **Contract Information** – Set up general information about the contract such as the name, number and reference. So when a new job is created for this contract, the job budget set here will be used. Set the default Team for this contract. When a new job is created for this contract it will be assigned to this team. Currency - This will show the selected currency when printing off Sales Quotes and Purchase orders for this contract. Note it does not calculate exchange rates. Contracts Logo – You can upload a logo here. This is useful if you are setting up a contract as a client and this logo can be the client's logo. This logo can be then be show on certain screens and PDFs such as the Sales Quote sent to

clients. Colour – The colour you set here for this contract will then display for jobs assigned to this contract on the job calendar and on the job list. Is Active – If turned off then the contract cannot be selected in contract dropdowns.


Contract Information	
Contract Name	<input type="text"/>
Contract Number	<input type="text"/>
Contract Reference	<input type="text"/>
Default Job Budget	<input type="text"/>
Team	<input type="text" value="(Please Select)"/>
Currency	<input type="text" value="GBP"/>
Contracts Logo	<input type="text"/> <input type="button" value="Remove"/> <input type="button" value="Upload"/>
Colour	<input type="text"/>
Is Active	<input type="text" value="Yes"/>

2. **Sales Margin %** – Here you can set the Sales margins for this contract. These margins will then be used when Generating a Sales Quote. You can also set a desired margin range. So when costing a job and adding a sales value, the user will see if the calculated sales margin falls within the desired range specified here.

Schedule of rates is relevant if you have enabled schedule of rates and visits in Settings -> Job Settings. When a job is created for this contract, then this schedule of rates for will be used when calculating sales values from the job visit.

Sales Margin %	
Sales Labour Mark-Up	<input type="text"/>
Sales Materials Mark-Up	<input type="text"/>
Sales Other Mark-Up	<input type="text"/>
Desired Margin Range	<input type="text" value="0"/> . <input type="text" value="0"/> %
Default Schedule Of Rate	<input type="text" value="(Please Select)"/> 

**3. Contact Information** – Set the contact information for the Contract here

Contact Information	
Name	<input type="text"/>
Email	<input type="text"/>
Telephone	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Town	<input type="text"/>
County	<input type="text"/>
Country	<input type="text" value="United Kingdom"/> 
Postcode	<input type="text"/>

**4. Budget Information** – Here you can set the Budget Value,

keep track of job costs and purchase order values.

Budget Information	
Job Costs	0.00
Purchase Orders	0.00
Remaining Budget	0.00

Once saved you will be directed to the Contract Details page where you will see the Sites, Priorities, Resources, Documents & Regions tab.

**1. Sites**– Sites can be assigned to a contract. This provides another way to group sites and is useful for organisations with many sites such as facilities companies.

Client 1 Contract Name C1 Contract Number c1ref Contract Reference

Contract Details **Sites** Priorities Resources Documents Regions

Selected Sites Back Save Add Site

Site	Code	Site Type	Region	Address	Reactive Jobs		Planned Jobs		Overdue Statutory	Requests
					Open	Overdue	Open	Overdue		Open
Building No 1	BNO1	Normal site	Generic Region	147 Campbell Road, Oxford, OX43NX, ...	100	12	8	8	8	6

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**2. Priorities** – You can choose to select certain Priorities for each Contract here. Click ‘ Selected Priorities Only’ and add your priority.

Client 1 Contract Name C1 Contract Number c1ref Contract Reference

Contract Details Sites **Priorities** Resources Documents Regions

Which Priorities can be Selected?  All Priorities  Selected Priorities Only Back Save

Selected Priorities Grid Add Priority

Priority Name	Response Time (Hours)	Nearly Due (Hours From Due Date)
No Priorities Selected		

Help

**3. Resources** – You can choose to select certain Resources

for each Contract here. Choose from the dropdown.

The options for this setting:

- **All Resources:** All resources will be available.
- **All Resources Except Selected:** All resources except the ones selected will be available.
- **Selected Resources Only:** Only the selected resources will be available

4. **Documents** – Upload and store documents against each contract.

5. **Regions** – You can restrict the regions which are available for this client contract. This will in turn restrict the sites that can be selected.

The screenshot shows a web application interface for managing a client contract. At the top, there are tabs for 'Contract Details', 'Sites', 'Priorities', 'Resources', 'Documents', and 'Regions'. The 'Regions' tab is highlighted with a red box. Below the tabs, there are fields for 'Client 1' (Contract Name), 'C1' (Contract Number), and 'c1ref' (Contract Reference). There are 'Back' and 'Save' buttons. Below this, there is a section titled 'Which Regions can be Selected?' with two radio buttons: 'All Regions' and 'Selected Regions Only'. The 'Selected Regions Only' option is selected. Below this, there is a table with columns for 'Region Name' and 'Country'. A red arrow points to the 'Add Region' button. At the bottom, there is a status bar showing 'No Regions Selected' and 'No Items to Display'.