

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		C1		c1ref				
Contract Name		Contract Number		Contract Reference				
Contract Details	Sites	Priorities	Resources	Documents	Regions			
Selected Sites								
Add Site								
Site	Code	Site Type	Region	Address	Reactive Jobs	Planned Jobs	Overdue Statutory	Requests
Building No 1	BNO1	Normal site	Generic Region	147 Campbell Road, Oxford, OX43NX, ...	Open: 100, Overdue: 12	Open: 8, Overdue: 8	8	6

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

Client 1		C1		c1ref	
Contract Name		Contract Number		Contract Reference	
Contract Details	Sites	Priorities	Resources	Documents	Regions
Which Priorities can be Selected?					
<input type="radio"/> All Priorities <input checked="" type="radio"/> Selected Priorities Only					
Selected Priorities Grid					
Priority Name	Response Time (Hours)	Nearly Due (Hours From Due Date)			
No Priorities Selected					

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 configuring regions. At the top, there is a header with 'Client 1' (Contract Name), 'C1' (Contract Number), and 'c1ref' (Contract Reference). Below the header is a navigation menu with tabs for 'Contract Details', 'Sites', 'Priorities', 'Resources', 'Documents', and 'Regions'. The 'Regions' tab is highlighted with a red box. To the right of the navigation menu are 'Back' and 'Save' buttons. Below the navigation menu 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 section is a table with columns for 'Region Name' and 'Country'. The table is currently empty, and a red arrow points to an 'Add Region' button on the right. At the bottom of the page, there is a pagination bar showing '10 Items Per Page' and 'No Items to Display'.