



*Provides Industry Specific Modifications To Add service and support contract management to UA*

### Contract Definition

- Define Contract types associated with specific material code
  - Contract Type
  - Description
  - Accounting Classifications
  - Periodicity
  - Fees
- Material code association enables Pricing of initial down payment and correlation to order entry and invoicing.
- Integrates with and automates recurring invoice structures in UA
- Enables automatic invoice generation and direct editing of individual planned invoice template.
- Reports
  - Contract definitions
  - Contracts by Customer
  - Contracts renewable by date range
  - Contracts not renewed by date range
  - Projected revenue by month next 12 months

Contract Number	Asset Type	Asset	Inv.	Description	Install Date	Start Date	Stop Date	Renewal Date	Customer	Or
<input type="checkbox"/> 3020	N/A	un-assigned	Yes	36Mo		07/06/2005	07/06/2008	05/07/2008	C & M Custom Fence Co	1C
<input type="checkbox"/> 3023	Equipment	Crane 2 - 120	Yes	36Mo	08/01/2005	10/15/2005	01/31/2006	12/31/2005	C & H Enterprises, Inc	1C
<input type="checkbox"/> 3023	Equipment	Crane 2 - 120	Yes	36Mo		02/15/2006	08/31/2006	08/01/2006	C & H Enterprises, Inc	1C
<input type="checkbox"/> 3024	Equipment	Crane 1 - 80	Yes	36Mo		10/01/2005	12/15/2005	11/15/2005	A Classic Fence Compa...	1C
<input type="checkbox"/> 3025	Equipment	Crane 1 - 80	Yes	36Mo		01/01/2006	03/30/2005	02/28/2005	Bailey's Landscaping	1C
<input type="checkbox"/> 3026	Equipment	Crane 1 - 80	Yes	36Mo		07/15/2005	07/15/2005	07/15/2005	A & T Fence Company	1C
<input type="checkbox"/> 3027	Equipment	Crane 2 - 120	Yes	36Mo		08/15/2005	08/15/2005	08/15/2005	A & T Fence Company	1C
<input type="checkbox"/> 3028	Equipment	Crane 1 - 80	No	36Mo		08/15/2005	08/15/2005	08/15/2005	A & T Fence Company	1C

  

CustomerName:	A & T Fence Company
Ship1:	400 Clear Oaks Drive
Ship2:	
Ship3:	
City:	Dalton
State:	GA
Zip:	30721
OrderDate:	7/6/2005
Order#:	100514

### Contract Manager

- Visually tracks all open contracts
- Automates creation of recurring invoices from contract sales orders
- Manages: renewals, cancellations, date changes.
- Filters on screen on any column
- Produce list report to match filter on screen.

ContractNumber	Type	Term	startdate	stopdate	renewaldate	orderid
3026	36Mo	Monitor Contract	05/01/2006	08/31/2006	07/15/2006	38913

### Customer Maintenance

- Added Tab Page displays contracts/ status by customer