

Contract Periods - Add Contract Period

Wed, Jan 17, 2024 Contract Actions

1. This allows the user to set a new period that can be created from scratch whereas [renew/copy](#) creates a follow-on period with all the existing details from the last period, starting the day after it has ended (but excludes any Buildings where periods were shortened). From the Contract Periods screen, shown below, click on the Add button.

Contract created for Dr Explain

Linked SRA Details

SRA Name: For Dr Explain SRA Unique Reference: 809
SRA Description: For Dr Explain SRA Resource: AMK Maintenance Ltd

Contract Details Cancel Contract

Name: Contract created for Dr Explain Code: 809/1
Description: Contract created for Dr Explain Status: Active

Contract Periods Add View Renew / Copy Delete

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
10/04/2013	09/04/2014	£0.00	Fully Comprehensive Reactive an...		<input type="checkbox"/>	Invalid

Close

Please note: There are two "Status" fields - the one that is located under the Contract Details section denotes whether the contract overall is Active/Cancelled. The other is under the Contract Periods section, this states whether the contract period is pending/expired/active etc.

Explanation of the different statuses available:

Active - The contract period is fully active and will be able to be selected when raising a work order

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
01/08/2012	31/07/2013	£44,210.40	Pay As You Go Reactive and PPM ...		<input type="checkbox"/>	Active

Expired - The contract period has lapsed and the contract/period has therefore expired. The contract will not be able to be selected when raising a work order

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
01/08/2012	31/10/2012	£6,738.00	Pay As You Go PPM - Parts Payable		<input type="checkbox"/>	Expired

Cancelled - The contract period has been cancelled. The contract will no longer be valid and will

not be able to be selected when raising a work order

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
01/03/2013	14/03/2013	£0.00	Pay As You Go PPM - Parts Payable		<input type="checkbox"/>	Cancelled

Pending - The contract period is for a future period, therefore this contract/contract period is pending the specified dates

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
01/04/2013	31/03/2014	£1,400.00	Pay As You Go PPM - Parts Payable		<input type="checkbox"/>	Active
01/04/2014	31/03/2015	£1,400.00	Pay As You Go PPM - Parts Payable		<input type="checkbox"/>	Pending

Invalid - The contract has been raised from an incomplete SRA thus making the contract invalid

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
10/04/2013	09/04/2014	£0.00	Fully Comprehensive Reactive an...		<input type="checkbox"/>	Invalid

2. This window will open:

The screenshot shows a dialog box titled "Add Contract Period". It contains the following fields:

- Contract Group Type: Comprehensive
- Contract Type: Fully Comprehensive Reactive and PPM - Parts Payable
- Period Start Date: 01 March 2014
- Length: Annually

Buttons: OK, Cancel

3. Contract Group Type - select from the predefined list whether the contract is a "Comprehensive" or "Pay As You Go" contract.

4. Contract Type - select from the predefined list dependant on the previous field selection. This will determine if the contract is a Reactive, PPM or a combination of the both and whether the Parts are deemed the be payable or not.

5. Clicking on the Period Start Date drop down arrow will pop up a calendar for the User to define the start date of the contract (this will only show dates that will not conflict with any previous contract periods set up).

6. Length - select from a predefined list to determine the length of time this contract is for .

7. Once all the information has been entered, click on the OK button. The User will then be presented with an "Are you Sure?" Message. Clicking 'Yes' will create a new period for this contract, clicking 'No' will return to the previous screen.

Please note: Once this information has been set it cannot be amended. If any of these details are incorrect after clicking 'OK' the contract would need to be [cancelled](#) and re-raised.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=202>