

Contract Periods - Renew Contract Period

Wed, Jan 17, 2024 Contract Actions

1. This allows the User to renew a contract by creating a new period using all the existing details from the last period, starting on a day specified by the User. Whereas [Add Contract Period](#) allows the User to add a new contract period from scratch without copying any details.

From the Contract Periods screen, click on the Renew/Copy button:

The screenshot shows a web form titled "Contract Contract for Dr Explain". It is divided into several sections:

- Linked SRA Details:** Contains fields for SRA Name (SRA for Dr Explain), SRA Unique Reference (797), SRA Description (SRA for Dr Explain), and SRA Resource (AMK Maintenance Ltd).
- Contract Details:** Contains fields for Name (Contract for Dr Explain), Code (797/1), Description (Contract for Dr Explain), and Status (Active). A "Cancel Contract" button is located in the top right of this section.
- Contract Periods:** A table with columns: Start Date, Finish Date, Contract Value, Contract Type, Cancellation Period, Signed, and Status. It contains one row with values: 09/04/2013, 08/04/2014, £0.00, Pay As You Go PPM - Parts Payable, and Active. Above the table are buttons for "Add", "View", "Renew / Copy", and "Delete".

A "Close" button is located at the bottom right of the form.

2. The options are then presented as follows:

The screenshot shows a dialog box titled "Add Contract Period". It contains three radio button options, each with a help icon:

- Renew From End:** The selected option.
- Renew During:**
- Renew After:**

Below these options is a "Start Date" field with a dropdown menu showing "01 September 2018". At the bottom are "OK" and "Cancel" buttons.

Renew From End - This is the standard renewal process and will create the next period of the Contract based on the end date of the current period. The start date of the new period will be one day after the end date of the old contract period

Renew During - This allows the user to renew a contract in the middle of the existing period. The new contract period will start before the old contract period has finished. The old contract period will be shortened which may affect Work Orders. PPM visit dates will be reset for all PPM tasks where dynamic dates is either not supported or off

Renew After - This allows the user to renew the contract after the normal renewal date. The new contract period will start after the old contract period has finished. This means there can be a gap between when a contract is available. PPM visit dates will be reset for all PPM tasks where dynamic dates is either not supported or off

3. Making the selection and clicking 'OK' will Renew/Copy the contract and set it to a status of Pending. Clicking 'Cancel' will take the User to the previous screen.

Contract Contract for Dr Explain

Linked SRA Details

SRA Name: SRA for Dr Explain SRA Unique Reference: 797
SRA Description: SRA for Dr Explain SRA Resource: AMK Maintenance Ltd

Contract Details Cancel Contract

Name: Contract for Dr Explain Code: 797/1
Description: Contract for Dr Explain Status: Active

Contract Periods Add View Renew / Copy Delete

Start Date	Finish Date	Contract Value	Contract Type	Cancellation Period	Signed	Status
09/04/2013	08/04/2014	£0.00	Pay As You Go PPM - Parts Payable		<input type="checkbox"/>	Active
09/04/2014	08/04/2015	£0.00	Pay As You Go PPM - Parts Payable		<input type="checkbox"/>	Pending

Close

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