

How to create and edit contracts

Click 'Admin Panel' > 'Finance' > 'Contracts'

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Overview

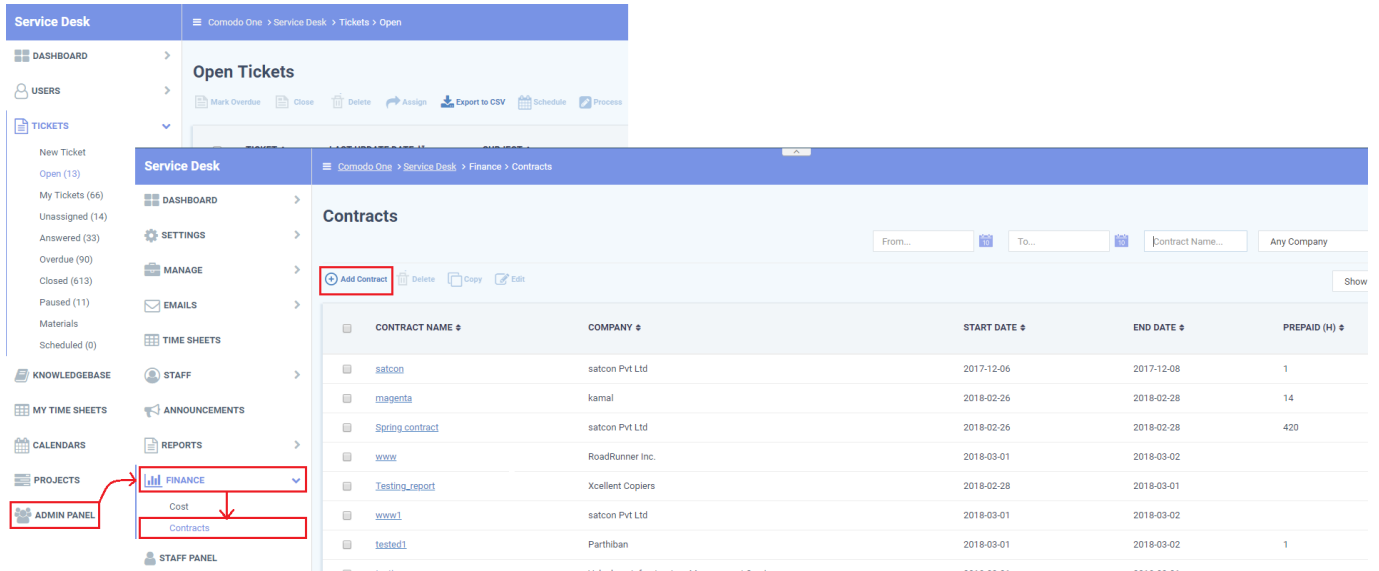
Contract - An agreement between you and a customer which specifies the charges you will levy for your services over a billing cycle.

You can configure the following in a Service Desk contract:

- **Contract Fee** (optional). A fixed charge for a billing cycle (weekly, bi-weekly, monthly or annual). The contract fee is always charged on top of any charging plans and/or global asset rates.
- **Prepaid Hours** (optional). The number of hours your company will provide at no charge under the contract fee. You can set different pre-paid hours for each type of service (telephone, remote, on-site). If the time spent exceeds the pre-paid hours, then only the excess time is subject to charge.
- **Charging plan** (optional). A template you can add to a contract which lets you define custom hourly rates for your services. Charging plan rates are only applied after prepaid hours have been used. You can add the following to a charging plan:
 - **Default Hourly Rate** (mandatory). The hourly charge applied to work not covered by a variable rate.
 - **Variable Rates** (optional). Special rates for specific types of work. For example, you might want to charge a different rate for on-site visits, or for work on a specific asset, or for work that exceeds a certain length of time.
- **Global Asset Rates** ('Admin Panel' > 'Manage' > 'Charging' > 'Default Charging') – While not part of a contract, per se, you should still consider global asset rates. Asset rates specify charges for work on items like workstations, servers, printers, routers etc. Global asset rates are only charged when prepaid hours and charging plans have been processed.

Create a contract

- Log into Comodo One / Dragon then click 'Applications' > 'Service Desk'
- Click 'Admin Panel' > 'Finance' > 'Contracts'
- Click 'Add Contract':



There are three main sections in the new contract form:

1) General Information

New Contract

General Information

Contract Name: *

Company: *

Contract Details:

Start Date: * (?)

End Date: * (?)

- **Contract Name** – Label to identify the contract
- **Company** – The customer organization to whom the contract applies
- **Contract Details** - Brief description of the contract
- **Start Date** - The date from which the contract is effective
- **End Date** - The date the contract expires

2) Contract Parameters

Contract Parameters

Fee: 100.00

Billing Period: Monthly

Unused Hours: Don't Carry Forward

Prepaid Hours will be calculated according to the number written on the field next to service types.

Prepaid Hours: 24 Unlimited

Distribute prepaid hours to service types

Onsite: Unlimited

Remote: Unlimited

Telephone: Unlimited

Fee – A fixed charge billed to the customer for the services you provide. The billing cycle determines how often the fee is charged.

- This fee will always be charged, regardless of other charges in charging plans and global asset rates.
- You may wish to set a fee then use 'Prepaid Hours' to specify the amount of work that will be covered by the fee.
- If no fee is specified, then charges for service sessions are calculated from other parameters in the contract.

Billing Period – How often the total charges in the contract will be billed to the customer

Unused Hours - Choose whether or not any remaining pre-paid hours at the end of a billing cycle are carried over to the next cycle. Hours that are carried forward are added to the pre-paid hours of the same service type in the next billing cycle.

Prepaid hours – Hours worked by staff during the cycle that won't be charged to the customer.

You have the option to spread prepaid hours over different services types - 'Onsite', 'Remote' and 'Telephone'.

Unlimited - You will not charge a fee for any hours worked by your staff on this service type.

Prepaid Hours will be calculated according to the number written on the field next to service types.

Prepaid Hours: Unlimited

Distribute prepaid hours to service types

Onsite: 50 Unlimited

Remote: 75 Unlimited

Telephone: 80 Unlimited

3) Charging Method

Specify a charging plan for the contract.

Charging plans are templates which let you specify custom hourly rates for your services.

- Click 'Admin Panel' > 'Manage' > 'Charging' to create a custom charging plan. See [this wiki](#) if you need more help with this.

Charging plan rates are only applied after prepaid hours have been used.

- **Charging** - Select the plan you want to add to the contract from the drop-down.
- **Default Charging** – A plan which charges the global asset rates.
- **Not Now** – disable charging plans on this contract.

Click 'Save' to apply the contract to the customer.

Edit a contract

- Click 'Admin Panel' > 'Finance' > 'Contracts'
- Select the contract you want to modify then click 'Edit':

The screenshot shows the 'Contracts' page in the Service Desk interface. The left sidebar contains navigation options: DASHBOARD, SETTINGS, MANAGE, EMAILS, TIME SHEETS, STAFF, ANNOUNCEMENTS, REPORTS, FINANCE (with sub-items Cost and Contracts), and STAFF PANEL. The main content area is titled 'Contracts' and includes search filters for 'From...', 'To...', 'Contract Name...', and 'Any Company'. Below the filters are action buttons: 'Add Contract', 'Delete', 'Copy', and 'Edit' (highlighted with a red box). A table lists several contracts:

CONTRACT NAME	COMPANY	START DATE	END DATE	PREPAID (H)
satcon	satcon Pvt Ltd	2017-12-06	2017-12-08	1
magenta	kamal	2018-02-26	2018-02-28	14
Spring contract	satcon Pvt Ltd	2018-02-26	2018-02-28	420
www	RoadRunner Inc.	2018-03-01	2018-03-02	
Testing_report	Xcellent Copiers	2018-02-28	2018-03-01	
www1	satcon Pvt Ltd	2018-03-01	2018-03-02	
tested1	Parthiban	2018-03-01	2018-03-02	1

- Click 'Save' to apply your changes.

The charging flow

The following chart shows the charging flow covered in this wiki:

