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## 2.4.05 Contract

The **Contract** form administers periodical invoicing with its general conditions. This functionality can be used for example, for maintenance contracts and service contracts or billing of domains or subscriptions. The form contains information about the project, the invoice recipient, the scope of services, the payment method and the generated invoices.

Furthermore, the payment plan can be stored in the contract.

**Tip:** For more on this subject see chapter [4.4.07 Contract Administration](#).

**Vertrag 54353**

Dokument Bearbeiten Ansicht Rückverweise Aktionen

**Stammblatt** Sonstiges

**Bezeichnung** 54353

**Projekt** 138 Einführung Projectile

**Auftraggeber** CONSULT AG

**Ansprechpartner** Nahl Lisa

**Typ Zahlungsplan** Plan

**Periode**

**Zeitspanne** von 08.07.2009 bis 24.07.2009

**Betrag** Netto 30.000,00 EUR jährlich EUR

**Umsatzsteuer** USt-D-19%

**Brutto** 35.700,00 EUR

**Bedingung** Periodenanfang ☒ Periodenmitte ☐ Vorauszahlung ☐

**Rechnungen**

**Zahlungspläne**

Position	Bezeichnung	Datum	Fertigstellung	Abschlag	Betrag
1-1	1.Zahlung	01.07.2008	%	%	8.000,00
1-2	2.Zahlung	01.12.2008	%	%	10.000,00

The screenshot shows a web form titled "Contact Williams George". The form has a blue header bar with a close button and a menu bar with options: Document, Edit, View, Back references, and Actions. Below the header, there are tabs: Master data, History, Office, Details, Privat, and Misc. The form is divided into two main sections. The top section contains fields for "Number" (1), "Customer" (TLC Telecommunications Corporation), "Type" (Entrepreneur), "Salutation" (Mister), "Titel" (Dr.), "Contact name" (Williams), "Contact first name" (George), "Department", and "Function". The bottom section contains fields for "Phone number" (+44 1234564567), "Fax number" (+44 1234564567), "Cell phone number", "Email" (williams@tlc.com, mailto:williams@tlc.com), and "Note".

The form consists of the following elements:

On the "Master Data" tab:

- **Description:** This alphanumerical field specifies the contract and is used as the invoice number.
- **Project:** In this field the project is selected for which the periodical services are rendered and to which invoice it should be generated. Projects can be defined and modified in the project form.
- **Customer:** This field specifies the invoice recipient for the periodical invoices. The customer can be defined and modified in the contact form (with the contact type customer).
- **Contact Person:** This field specifies the contact person of the invoice recipient. This field is filled with contact person of this customer after selecting a customer. When issuing an invoice the differui address of the contact person (if needed) is used as the invoice address. The contact person is administered in the contact input menu.
- **Payment Mode:** This select box consists of the "Milestone", "Periodical" and "Plan" options. With the "Milestone" option payment modes are stored in selected milestones and when the milestone is completed the system generates an advanced payment invoice. With the "Periodic" option entering data in the field "Period" is necessary. The system then generates the periodical invoices (see also 4.4.6 Administer Contracts). With the "Plan" option, a payment plan is the basis for invoicing (see also Payment Plan).
- **Period:** Periods for the contracts can be defined in this drop-down box, when payment mode type = Periodical is selected. The following periods are available: daily, weekly, monthly, quarterly and yearly. In this field, the total amount for the costs from the selected periods is displayed for the cumulated amount.
- **Time Span (from/to):** The elements from/to specify the duration of the defined contracts and are necessary for the option payment plan type = "Periodical".
- **Net Amount:** The net amount of the invoice for the defined contract is entered in this field, when the payment plan type = "Periodic" is selected.
- **Value-Added Tax:** In this field the value-added tax which is valid for this invoice is entered

through the drop-down box. By default, this field is pre-set with the valid tax rate from the assigned country used from the configuration form. The value-added tax can be defined and modified in the value-added tax form.

- **Total Amount:** In this field the total amount of the invoice for the defined contract is entered, when the payment plan type = "Periodical" is selected.
- **Period Begin:** If this box is marked, billing starts from the first day of the period (otherwise on the last day of the period), when the payment plan type = "Periodical" is selected.
- **Prepayment:** If this box is marked, the invoice is issued in advance (otherwise only after the defined period), when the payment plan type = "Periodical " is selected.
- **Invoices:** This field specifies the invoice which is issued from the system. Additionally, it is possible to manually modify the invoice.
- **Payment Plans:** The payment plans for the contract are administered here (see also 4.4.6 Administer Contracts). (see also 4.4.6 Verträge verwalten)

Vertrag 54353

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammbblatt Sonstiges

Vertrag 1

Konfiguration Produkt A

Release Release 2.2

Umfang Voller Service und Updates

Währung EURO

Kurs 1

Bemerkung

Positionen

**Actions**

	DueOn	Arranger	Actiontype	Checked	Note
1	20.10.2009 00:00:00	Hahn Katrina	Reminder offer	0	
2	06.10.2009 13:39:09	Hahn Katrina	Incoming order	0	
3	01.10.2009 00:00:00	Timothy Jones	Meeting	0	Reminder

**TimeEntries**

	Name	Date
1	Meeting	10.06.2009 11:00:00

**Campaigns**

	Description	CampaignStatus	CampaignStart	CampaignEnd
1	Project Sales	active	02.08.2009	30.09.2009

On the "Misc" tab:

- **Contract:** This numerical field assigns a unique identification number to the contract from the system automatically.
- **Configuration:** This element contains the configuration or the product for maintenance and service and/or the domains or subscriptions. The configuration can be administered in Collections.
- **Release:** This element specifies the version number for the above defined configuration. The version can be administered in Collections.
- **Scope:** This element specifies the scope of service for the service or scope of supply for the item for the contract. This scope can be administered in Collections.
- **Currency:** The field currency specifies the currency of the invoice. By default, this field is pre-set with currency from the configuration form. The currency can be defined and modified in the currency form.
- **Rate:** The field rate is automatically preset with the valid exchange rate as the local rate when a project has been selected (see also configuration form). A differing rate can also be defined after the field has been pre-set (for example, for international projects, in which the currency risk should be minimized). The rates can be administered in the rate form.
- **Comments:** This field is designated for comments.
- **Positions:** This field specifies the services stated within the service contract as positions, when the payment plan type = "Periodical" is selected.

The document type consists of following actions:

- **Create all invoices:** Using this action, all invoices can be generated from the defined contract data, when the payment plan type = "Periodical" is selected.
- **Create next invoice:** Using this action, the next invoice can be generated from the defined contract data, when the payment plan type = "Periodical" is selected.

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