

# USER MANUAL CREATE CONTRACT

The **Create Contract** page lets you set up customer rental agreements by entering contract details, customer information, office and billing addresses, and billing contact details before proceeding to the next step.

# Create Contract

1

CUSTOMER LOOKUP

Search (name, email, phone, code)

type 3 character for result

2

BILLING CONTACT DETAIL

☒ SAME AS CONTACT PERSON

Customer First Name (Optional)

Customer Last Name (Optional)

Contact Phone

Mobile Phone (Optional)

Email Address

Company Name (Optional)

BILLING ADDRESS

Street Number

Unit Lot (Optional)

Street Address (Optional)

Postcode \*

Suburb \*

State (Optional)

Country \*

Australia

Tasmania

Next Step >

3

ORDER DETAILS

Select Contract Period

-- Select Contract Period --

Contract Start Date \*

19 Sep 2025

Contract End Date

#	Bin Size	Waste Type	Billing Cycle	Pickup Period	Price	Qty	Waste Charge Price per KG
Add Bin and Site							

4

< Back

Decline Contract

Accept Contract

Action ▾

This is the “**Create Rental Bin Contract**” menu.

In this menu, you can perform the following actions:

1. Customer Lookup
2. Fill in the Form and click “**Next Step**”
3. Add Bin Site
4. Accept Contract

# Customer Lookup

## CUSTOMER LOOKUP

Search (name, email, phone, code)
and
Graham Alexander   g.alexander@hotmail.com.au
Amanda Johnston   0488-997-005
Amanda Patman   0447486639   ajpatman@outlook.com
ANDREAS   424778622   servicecentre@anglicare-tas.org.au
Andrew Gould   andrewgould@live.com
Andrew Mulcahy   62314090

Use this feature to quickly find an existing customer. It helps you pull up their details instantly, making it easier to continue with the contract process.

# Customer Form

CONTRACT DETAILS		
Project Name *		PO
<input type="text"/>		<input type="text"/>
Start Date *		End Date
<input type="text"/>		<input type="text"/>
Value		Created Date
<input type="text"/>		18 Sep 2025
Assigned Sale		Assigned Account Manager
<input type="text"/>		<input type="text"/>

CUSTOMER DETAIL	
Customer First Name *	Customer Last Name *
<input type="text"/>	<input type="text"/>
Contact Phone	Mobile Phone (Optional)
<input type="text"/>	<input type="text"/>
Email Address	Company Name (Optional)
<input type="text"/>	<input type="text"/>

OFFICE ADDRESS		
Street Number	Unit Lot (Optional)	Street Address (Optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postcode *	Suburb *	State (Optional)
<input type="text"/>	<input type="text"/>	Tasmania
Country *	<input type="text"/>	
Australia		

BILLING CONTACT DETAIL	
_SAME AS CONTACT PERSON	
Customer First Name (Optional)	Customer Last Name (Optional)
<input type="text"/>	<input type="text"/>
Contact Phone	Mobile Phone (Optional)
<input type="text"/>	<input type="text"/>
Email Address	Company Name (Optional)
<input type="text"/>	<input type="text"/>

BILLING ADDRESS		
Street Number	Unit Lot (Optional)	Street Address (Optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postcode *	Suburb *	State (Optional)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Country *	<input type="text"/>	
Australia		

Next Step >

## Form Rules

- All fields marked with (\*) are mandatory. Make sure these are filled in before moving forward.
- Once you've completed all customer order details, click the **“Next Step”** button to continue to the payment process.

## Add Bin and Site

Trash bag Quote

Order Bins Clear Back

**ORDER DETAILS**

Select Contract Period

-- Select Contract Period --

Contract Start Date \* 19 Sep 2025

Contract End Date

#	Bin Size	Waste Type	Billing Cycle	Pickup Period	Price	Qty	Waste Charge Price per KG
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Terms & Conditions

Add Bin and Site

Next Step >



Add Bin and Site

Alias Invoice Notation

Site

Name Phone

Street Number Unit / Lot (optional) Street Name

Postcode Suburb State Bin Size \* -- Select bin size --

Waste Type \* Qty \* Status

Name Phone

Street Number Unit / Lot (optional) Street Name

Postcode Suburb State Bin Size \* -- Select bin size --

Waste Type \* Qty \* Status

Delivery Instructions (optional)

☐ Add ☐ PM ☐ Cash on Pickup

Fix Charges

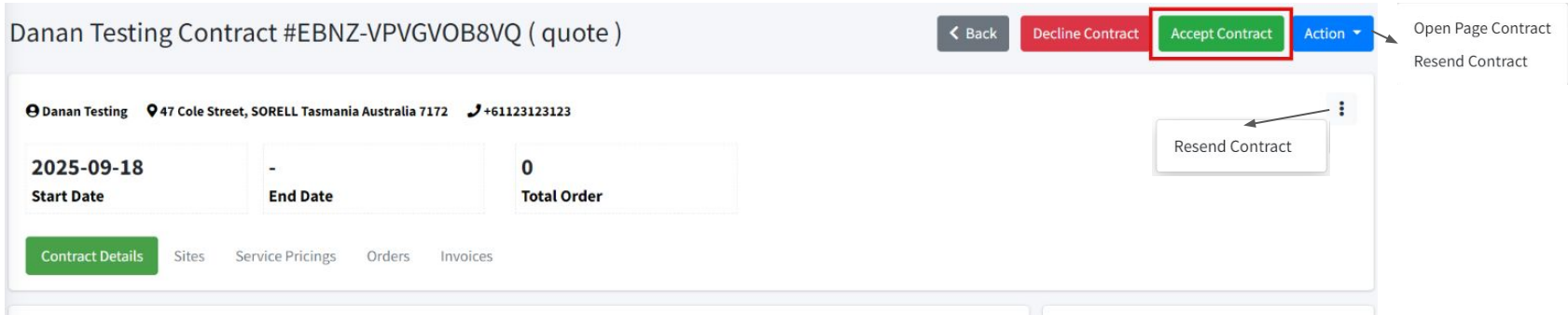
☒ Bin Rental Fee \$ 0

☐ Change Over \$ 0

Subtotal \$ 0.00

- After you finish filling in the order details form, click **“Add Bin and Site”**.
- Complete the **Add Bin and Site** form, then click the **“Add Bin and Site”** button at the bottom right corner.
- Once all details are added, click the **“Next Step”** button to continue.

## Contract Review



The screenshot shows the 'Contract Review' page for 'Danan Testing Contract #EBNZ-VPVGVOB8VQ (quote)'. At the top, there are four buttons: '< Back' (grey), 'Decline Contract' (red), 'Accept Contract' (green, highlighted with a red box), and 'Action' (blue). To the right of the 'Action' button is a dropdown menu with two options: 'Open Page Contract' and 'Resend Contract'. Below these buttons, the contract details are displayed: 'Danan Testing' with a location pin icon, '47 Cole Street, SORELL Tasmania Australia 7172', and a phone icon with '+61123123123'. Below this, there are three boxes: '2025-09-18' labeled 'Start Date', '-' labeled 'End Date', and '0' labeled 'Total Order'. At the bottom, there is a tabbed interface with 'Contract Details' (green), 'Sites', 'Service Pricings', 'Orders', and 'Invoices'. On the right side of the contract details section, there is a 'Resend Contract' button, which is linked from a three-dot menu icon.

- After reviewing the contract, click “**Decline Contract**” or “**Accept Contract**” to complete creating the Rental Bin Contract.
- The “**Action**” button provides two options: **Open Page Contract** and **Resend Contract**.
- The “**Three Dots**” button gives three options: **Add Service Pricing**, **Resend Contract**, and **Add Comment**.