Contracts

In version 1.21.18, we added the ability to send contracts from HeroTill. This is currently still in the beta testing phase.

This contract function is a part of the new compliance module that is being developed. This will allow the WISP to send the contract to the customer – this will be done from the customer profile. This contract will contain all the customer's current information, their recurring billing (a requirement to send the contract), as well as the WISP's terms and conditions. The customer will need to confirm these details and sign the contract and can then be uploaded to their customer profile in the compliance documents section.

Setup

The setup for the contract can be found by going to **Setup** –> **System Settings** –> **Customer Contracts** option. On this screen, you will be able to amend the contract introduction, terms & conditions, decide whether the debit order form should be included or not, enter your sending email address, add the email title and edit the e-mail content.

Please keep in mind:

- If you want to make changes to your contract introduction and terms & conditions, it is suggested that you have some basic HTML knowledge.
- The email address that you use for sending these contracts should not be linked to your helpdesk/mailbox scraping as these contracts contain sensitive information not meant for everyone's eyes.

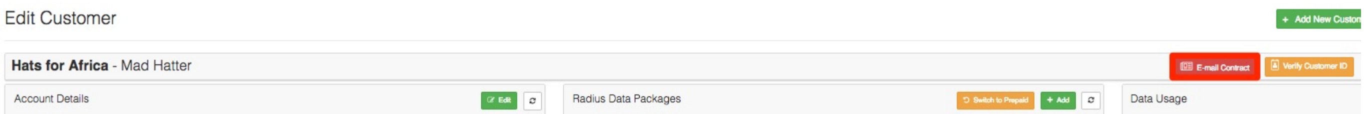
Permissions:

To be able to view, send or upload compliance documents, you will need the following permissions enabled:

- sales_write permission or
- compliance_write permission.

Sending the contract to the customer:

To send the contract to a customer, go to the customer's profile and then click on the "**E-mail Contract**" button.



If it is a customer of a reseller, the button will only appear if "bill all to master account" is disabled on the reseller of that customer.

Example of the contract:

Click on the link to view an example of the PDF generated contract: HeroTill generated contract example

Please note that your own company logo and details will appear on your contracts.

Compliance Documents:

After the customer has signed and sent the documents back to the WISP, the WISP will need to upload the document to the compliance section on the customer edit screen. The compliance documents section can be found on the bottom right-hand side of the customer profile.