

# Adding Contracts to Customers or Assets in Gomocha FSP

Last updated by | David Mishler Gomocha | May 5, 2025 at 11:34 AM GMT+2



## Adding Contracts to Customers or Assets in Gomocha FSP

### Contract Settings Configuration

**Step 1:** From the Portal Menu, select "**Administration**".

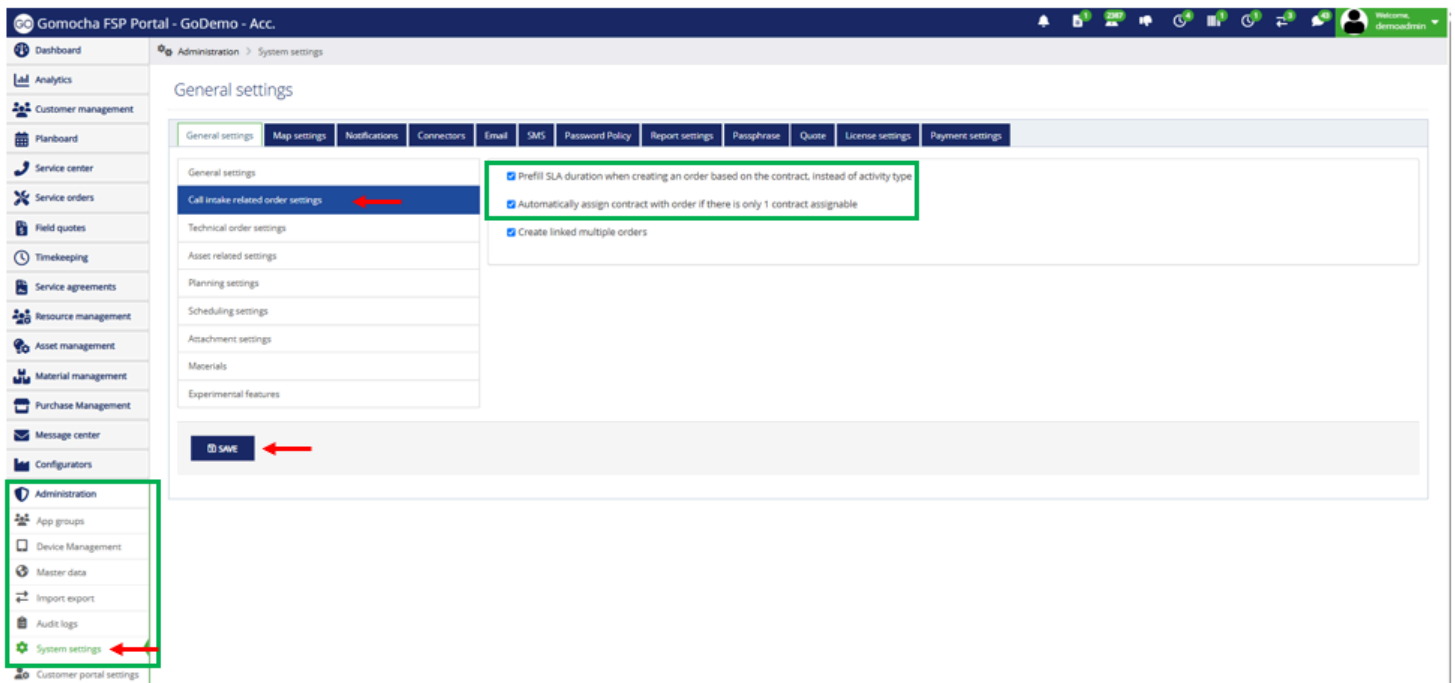
**Step 2:** In the Administration menu, click "**System Settings**".

**Step 3:** On the "**General Settings**" screen, choose "**Call intake related order settings**".

**Step 4:** Enable "**Prefill SLA duration**" to ensure the SLA is determined by the contract rather than the activity type.

- **Optional:** Enable "**Automatically assign contract**" to have a contract auto-assigned to an order when only one eligible contract exists.

**Step 5:** Click "**Save**".



### Contract Creation and Application

**Step 1:** Select a customer or customer asset to assign a contract.

- **Legacy Portal:** Navigate to **Call Intake > Search**, then select the customer or asset, or add one during creation.
- **New Menu Layout:** Go to **Customer Management** or **Service Center**.

**Step 2:** On the "**Customer Details**" or "**Asset Details**" screen, click the edit button (green pencil icon).

- In this example, we are editing a customer.

**Step 4:** On the details screen, navigate to "**Contracts**" and click "**+ADD**".

Id	Type	Customer	Asset description	Start	End	Commands
Last Inspection Date Test	Breakdown	Amstel	Pump	3/21/2025	12	[+][pencil][power]
c1000302	Maintenance	Amstel		1/1/2025	12	[+][pencil][power]
c1000080	Maintenance	Amstel		1/1/2022	12	[+][pencil][power]
c1000081	Service	Amstel		1/1/2022	12	[+][pencil][power]

**Step 5:** Enter the required information in the **contract details** form.

Create - (FITC\_20250505\_092120) ✕

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**Contract Details**

Id FITC_20250505_092120	Description <input type="text"/>
SA Number <input type="text"/>	Notes <input type="text"/>
Type Select type	Service interval -
Start 05/05/2025 <span>Clear</span>	End 05/12/2025 <span>Clear</span>
Customer -	Assets Search and select asset
Skills Skills	

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**Custom fields**

Certificate code: <input type="checkbox"/>	CUSTOMKEY_47E1FAB4-5B41-447E-9FCF-11F18BBE38AC
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Auto-create maintenance order

CANCEL SAVE

If "Prefill SLA duration" is enabled, complete the SLA section to prefill specific values.

- **Note:** This can only be done **after** the basic contract has been saved by editing the contract.

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**Activity type with default SLA duration and priority**

Type Breakdown	SLA duration (in hours) * 2	Priority High
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→ SAVE ADD

**Step 6:** Click **Save** to save the contract (not shown).

**Step 7:** On the "**Edit Details**" screen, click **Save** again to ensure all changes are applied.

- Any updates will be lost if this step is not completed.

**EDIT CUSTOMER** ✕

P2430612:1	Unplanned	Amstel	Maintenance		3/31/2025, 7:00 PM
P2430585:1	Unplanned	Amstel	Maintenance		3/21/2025, 6:55 PM
P2430573:1	Approved after completion	Amstel	Breakdown		3/21/2025, 11:00 AM

⌂ < 1 1 2 3 4 5 6 7 8 9 >

[Reset grid state](#)

**Contracts** ↗

Id	Type	Customer	Asset description	Start	Er	Commands
Last Inspection Date Test	Breakdown	Amstel	Pump	3/21/2025	12	
c1000302	Maintenance	Amstel		1/1/2025	12	
c1000080	Maintenance	Amstel		1/1/2022	12	
c1000081	Service	Amstel		1/1/2022	12	

⌂ < 1 1 >

[Reset grid state](#)

[+ ADD](#)

**Opening hours** ↗

Day of week	Start time	End time	Timezone	Commands
No records available				

⌂ < >

[Reset grid state](#)

[+ ADD](#)

[CANCEL](#)
[SAVE](#)

**Step 8:** The contract will now appear in the **Contracts** section of the **"Customer Details"** or **"Asset Details"** screen.

**Contracts** ↗

Id	Type	Customer	Asset description	Start	Er	Commands
Last Inspection Date Test	Breakdown	Amstel	Pump	3/21/2025	12	
c1000302	Maintenance	Amstel		1/1/2025	12	
c1000080	Maintenance	Amstel		1/1/2022	12	
c1000081	Service	Amstel		1/1/2022	12	

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[Reset grid state](#)

[+ ADD](#)

## Usage Example

### Image 1

- Call Intake > select customer and customer asset that contract was applied to > Create new order >
- Contract is prefilled because we selected this setting in system settings> Type and SLA Duration is still unfilled because no activity has been selected

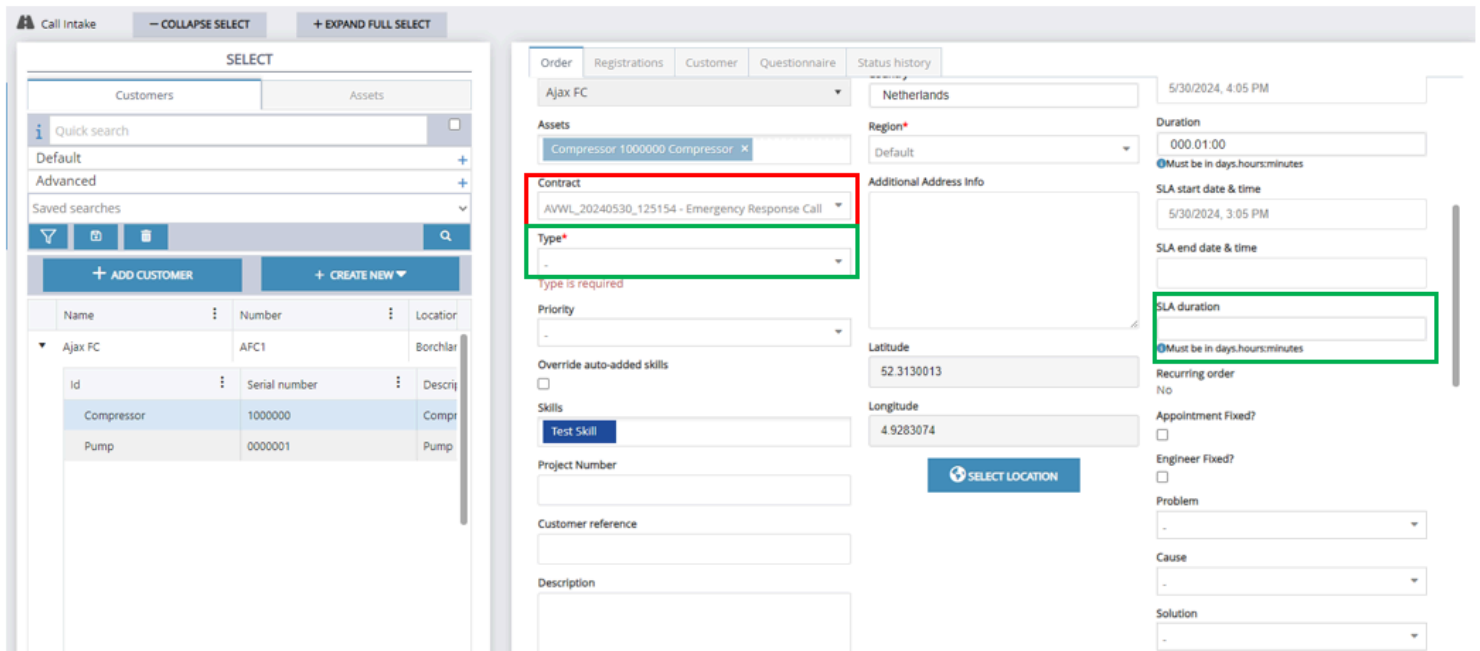


Image 2

- Select activity type contract was created on, E-Call > Priority and SLA duration now prefilled
- SLA duration and priority are now based on contract and not Activity type

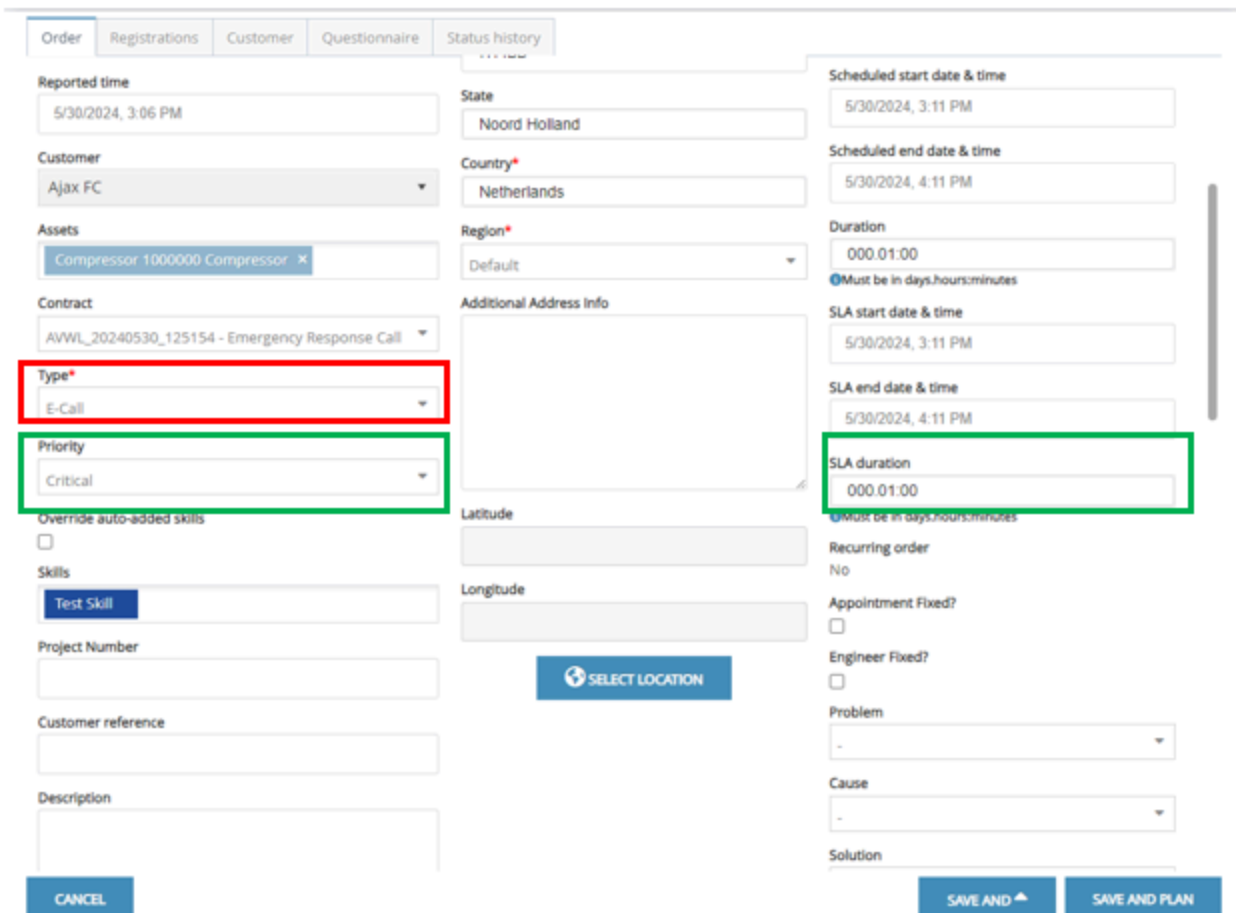


Image 3

- Here, we can see that without a contract an E-Call has an SLA response time of 480 minutes (8 hours)
- As seen above, WITH a contract that SLA response time is 60 min (1 hour)

Master data manage

Select master data type

Activity type ▼

Search

Show active items only  Use translation

+ ADD NEW MASTER DATA ITEM

Id	Description	Billable	✎
Maintenance	Maintenance	1	✎
Failure	Failure	1	✎
Installation	Installation	1	✎
Meeting	Meeting	0	✎
Lunch	Lunch	0	✎
TravelHome	Travel home	0	✎
Project	Project	1	✎
E-Call	E-Call	1	✎
Preventative Maint...	Prevent Maintenance	1	✎
KT	KT	0	✎

SAVE ITEM
ARCHIVE ITEM

**Id\*** E-Call

Description\* Description

Duration\* 60  
Must be in minutes

**Responsetime\*** 480  
Must be in minutes

Billable

Flow definition\* BreakDown

Color\* ■

Finishingactor\* Default finishingactor

Allow create in App

Is project

Is bundle

Skill Select List...

Property definitions Select List...

Is used by customer portal

**Note:** The wording doesn't match

- Master Data > Activity Type compared to Call Intake Screen
  - Duration=Duration on call intake/order creation screen
  - Response time= SLA Duration on call intake/order creation screen