Oracle® Service Contracts

Concepts and Procedures

Release 11*i*

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Oracle Service Contracts Concepts and Procedures, Release 11*i*

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Preface

Welcome to the Oracle Customer Relationship Management, Release 11*i*, suite of applications.

This Concepts and Procedures manual provides information and instructions to help you work effectively with Oracle Number Portability.

This preface explains how Concepts and Procedures is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives
- Customer Service Representatives (CSR)
- Service Administrators

Structure

This manual contains the following chapters:

"Understanding Service Contracts" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"Using Service Contracts" provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Related Documents

For more information, see the following manuals:

- *Oracle Contracts Core*

Conventions

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
boldface text	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

Understanding Service Contracts

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Overview

This section describes Service Contracts. The functionality falls into five major categories:

- Authoring
- Pricing and price adjustment
- Usage pricing and billing
- Bill settlement
- Entitlement processing

Service Contracts automates the contract process and provides seamless access to information contained in Oracle CRM and ERP applications.

Using Service Contracts, users can define any combination of services and gain visibility to their contracts by ensuring that those deliverables are automatically tracked.

Authoring

The Oracle Contracts family of products has been rearchitected and enhanced in the move to 11i. The authoring process brings these enhancements together so that more information can be recorded and tracked for each contract.

Parties to the Contract

The customer is your primary focus in a service contract. In addition to the customer, Service Contracts now provides the ability to define any number of parties that are associated with your contract. Each party can be given a role, for example a "Contract Administrator." Roles can be user-defined or users can select a role that is supplied with Oracle Contracts. Users can define any number of contacts for each party. This information can be used for verification, for example to confirm that the individual that wishes to log a service request is indeed a valid contact associated with the contract.

Service Programs and Warranties

The ability to define service programs and warranties that was available in Oracle Service 3i is now included in Service Contracts. (service programs are called extended warranties). This provides one central place to view all contractual commitments and allows users to take advantage of the greater flexibility of Oracle Contracts.

Installed Base Integration

Installed base integration ties into the contract authoring form. Authoring accommodates an expandable or collapsible set of data from the installed base. Any node or data item can be selected for inclusion (or exclusion) from coverage.

Usage Items

In addition to defining service line items in the contract, with contract authoring, users can define usage line items. For example, a customer may wish to purchase the use of a photocopier where the consumable items such as paper and toner are supplied. Please refer to the Usage Pricing and Billing section below for further information.

Usage Pricing and Billing

For usage line items, the customer may choose to pay for the actual quantity of copies that have been counted on the copier or to pay for a fixed quantity each billing period. Price breaks can be set up to vary the price applied depending on the volume used. There is also the ability to apply a minimum quantity on the contract, for example, customers will be charged for a minimum of 1000 copies regardless of the actual quantity used.

Leveling

The products that are included within the usage line definition may be leveled. That is, the counter readings for each product selected for leveling are grouped together to calculate an average quantity. This simplifies the invoice that is sent to the customer.

Counter-Based Events

Product and service usage can be tracked using product and service counters. Events can be defined that are dependent upon a counter usage or at periodic intervals to determine when a required action should be performed. Events could initiate a workflow process or any other pre-defined function. For example, when a product counter equals 1000, a preventive maintenance visit could be scheduled. A support contract may allow a certain number of free calls, which may be tracked using a service counter. As milestones are reached in call volumes, events may be defined to trigger a change in billing rate or to terminate the contract for that customer.

Bill Settlement

Complex billing scenarios can be set up in Service Contracts. Contract billing involves determining the exact amount to be charged to a customer for services provided in a contract. The billing program calculates the invoice amount based on the billing frequency, first bill date, and bill on. The billing process is customized further by allowing bill settlement, invoice averaging, and billing profile definition.

Settling

Physical counter readings are passed across from the installed base to Oracle Contracts. For actual billing, the counter readings are used to determine the amount to be billed for usage. For fixed billing, the amount that is estimated to be used each billing period is charged and at the end of an agreed period of time, the bill to the customer would be settled. That is, the actual usage amount is obtained and compared to the fixed usage amount to calculate the credit or debit to be issued.

Averaging

Service Contracts also allows customer invoices to be averaged. That is, for an agreed period of time, say every three months, the customer invoices paid over that time would be grouped together to determine the average amount. This functionality can be used for customers that have a minimum quantity set up on their contract. If their actual usage was below the minimum quantity, they would

have paid for usage that they didn't receive. Averaging allows you to spread customer usage across their over-used and under-used products.

Counter values from products can only be averaged if they are from the same counter type. For example, the over-use of color copies on a printer can not be applied to the under-use of black and white copies.

The terms that are related to the averaging process are defined on the contract. For example, averaging may only be done for the first year of the contract and will be carried out on a quarterly basis during that year.

Billing Profile

Billing information can be set up at the customer level in Oracle Accounts Receivable, but the billing profile allows users to customize billing requirements at the contract level. A different billing profile can even be selected for each line of the contract. It includes details such as the media that the customer wishes to be billed by and whether the bill should be summarized.

Billing Interface

For both contract billing and usage billing, the invoice amount is sent to accounts receivable which generates the invoice. Invoices are generated from the pricing at the header level and line, based on the invoicing rules.

The invoice information can be retrieved from accounts receivable to be used to update the billing history against the contract.

Entitlement Processing

In addition to the entitlement functionality that was available in 3i, a separate component is available in Oracle Contracts to allow other applications to check the coverage for a particular contract.

Events

The Events component is an intelligent combination of actions, conditions, and outcomes that gives users the flexibility to handle a diverse range of event-related scenarios. This component is available not only to Service Contracts, but to any Oracle Service application. For example, if an important event happens, the user can automatically initiate a task, service request, workflow, or other type of procedure if certain conditions are met.

Understanding the Contract Launchpad

The Launchpad has functional areas: the Contract Launchpad and the Contract Navigator.

The Launchpad Inbox displays contracts that require action. The Find button brings up a pop-up called Inbox Find. By entering information in either the Select Status or Select Notification Type fields, you can search for a particular contract.You can use the Respond button to invoke workflow functions such as approving or rejecting a contract.

Another region on the Contract Launchpad is the Recent Documents area. The most recently modified documents can be accessed from here by double-clicking the contract, or by selecting the contract and clicking the Open button.

Bookmarked documents is a short list of contracts you maintain independent of any other criteria. You can access bookmarked contracts more quickly. Double-click on a contract to open it, or click the Open button. You can open a selected contract or remove the bookmark using the buttons.

You can use the Contract Navigator to get a more structured access to contracts, organized by contract groups. On the right side you see the contracts in a grid that belong to the group selected on the left side.

From the grid you can right-click to invoke several contract execution functions, or you can double-click the contract to get a quick overview of the contract. In addition to the overview, double-clicking gives you access to the contract history, schedule, and communications.

Understanding Events

Events provides an infrastructure to ensure that certain processes are initiated in response to events that satisfy user-defined criteria. Events functionality is available not only to Oracle Contracts but also to all Oracle Service application. This topic explains Events and how you can use it within Contracts.

Events allows you to automatically initiate actions such as creating a service request, sending a notification, and creating a task as a result of something happening or before an upcoming event.

In order words, it acts upon phrases like:

When this happens, do something.

At a certain point in time, something happens.

The "something happens" or "at a certain point in time" are referred to as *action*, and "do something" is referred to as *outcome*.

The action can be qualified by conditions. For example, it may not be whenever something happens, but "whenever something happens and some conditions are met."

In summary, Events comprises the following components: **action**, **conditions**, and **outcomes**.

Events allows synchronous and asynchronous processing. The asynchronous processing takes advantage of the advanced queuing method. That is, users do not have to wait until an event is evaluated and all the outcomes are executed to continue with their activities. On the other hands, due to the type of business, some applications such as Relationship Plan might require an immediate event evaluation while users are interacting with the application.

This section covers the following subjects:

Types of Events

What are conditions?

Types of condition lines

Different Types of Conditions

What are Outcomes?

Types of Events

With Events, you can handle action-based events and date-based events.

Action-based events are predefined actions that occur in the application. Examples of action-based events are contract signed, contract terminated, counter updated, change request initiated.

Date-based events are dates of significance within the application. For example contract expiration date.

You define action-based events and date-based events using the Actions form. In this form you also define action attributes that can be used further in conditions and outcomes.

What are Conditions?

You use conditions to define additional criteria to an action-based event or to a date-based event. The conditions also specify the outcomes that need to be initiated when the condition evaluates to true.

Conditions are composed of header and lines.

In the condition header you specify the event type by choosing either an action-based event or date-based event.

You use condition lines to qualify action and date based events. They are used to specify that an outcome is to be initiated not only when the action happens, but when the action happens and certain conditions are satisfied. For example: "when the contract is signed and the amount of the contract is greater than $100,000," or "30 days before contract expiration and when the contract category is network license agreement." It is not required to define condition lines for a condition.

Types of Condition Lines

There are three types of condition lines: **expressions**, **counters**, and **functions.**

Using expressions, you can define simple comparisons using the operators such as <, >, =. Expressions are always based on action attributes.

Counter condition lines are applicable for Service Contracts and Installed Base. It allows you to define conditions for a particular counter reaching a value. Counters can be defined for a product or for a service. For example "when the number of photocopies for a photocopier is greater than 1,000," or "when the number of calls made by a customer in a gold service agreement is over 10."

Functions can be used for more sophisticated criteria that can be addressed using PL/SQL procedures. A function accepts one or more parameters and returns true or false after its evaluation. Functions don't need to be based on action attributes.

Different Types of Conditions

There are three types of conditions:

n   Condition templates

n   Independent conditions

n   Conditions attached to contracts

Using condition templates, you can define multiple samples of conditions. From a template you can define either an independent condition or a condition to be attached to a contract.

Independent conditions are not owned by any object. Whenever an action occurs, regardless the contract, the outcome is initiated if the condition evaluates to true. For example, "whenever any contract is signed create a task to notify the contract administrator"

Conditions can be specific to contracts. Depending on the action, a condition can be related to a contract line or to a contract as a whole. For example "when the contract is signed" relates to the entire contract, and "when the contract line is terminated" relates to a line of the contract.

What are Outcomes?

An outcome is an automated process that performs a task such as initiating a service request workflow or sending a notification. When the condition is true, the outcomes associated with that condition are performed.

Outcomes need to be defined using the Process Definition form. There are four types of outcomes: workflow, PL/SQL procedure, alert, and script. Except for alert and script, all other outcome types are asynchronous outcomes.

Understanding Roles and Contact Sources

A contract is an agreement between at least two parties. Oracle Contracts allows you to add two or more parties when authoring a contract. Oracle Contracts provides a powerful setup to define the party roles and the source for validating parties, entered into the system elsewhere.

The setup of roles differentiates between sell and buy contracts.

Example

If you sell goods or services, then you are the vendor and your customer may already exist in your customer database as a regular customer.

If you buy goods and services, then you are the customer and your vendor may already exist in your vendor database. Even though you are the customer in this contract, you don't want to register as a customer in your customer database just to be available as the customer in the contract.

In both contracts you have a customer and a vendor each. In one contract you are the customer, in the other you are the vendor.

In order to allow for such different roles, you can define from which data source a role is fed.

In addition, Oracle Contracts allows you to define your own roles and to define the source for your customized roles.

Creating a New Role and Modifying Role Sources

Create a new role in the contracts setup menu for categories. You can assign the sources to the new roles in the setup menu for contracts under the menu item Sources. Depending on the intent of the contract, sell or buy, you can assign sources to your roles and the contacts for such roles.

If you want to update an existing role source, you must expire the current assignment for the role and intent. You cannot delete existing role sources to keep the role history of contracts created with a prior role assignment.

The sources you can choose from are predefined objects delivered with Oracle Contracts.

New Roles

In a contract, a role can only be selected if both of the following conditions are met:

n   The category you chose allows permits the use of that role.

n   The role has a valid source. Make sure that the source has a valid date range, the intent, sell or buy, matches your contract, and that the source has values.

After you have selected a role, you can tab to the following field, where the List of Values automatically refers to the right data.

Note: You cannot enter new customers from the Authoring window. If you enter a contract and you need to add a new customer or a one-time vendor, then you must first define the new customer or create a one-time vendor.

You can either use the setup menu in your contracts responsibility, or you can enter that data where it originates, that is, enter your new customer in Oracle Receivables before you can use it in your new contract.

The Concept of Object and Subject

You need this concept for Service Contracts only.

When you define a category, the category setup allows you to assign rules to roles. Use the subject and object to identify the party role you want to identify in your rules. For example, you may want to determine that your billing rules identifies the seller as the subject, in other words, the seller would send the invoice. The rule edit would then choose the right List of Values when you enter rule information.

Understanding Warranties

In Contracts, you can define warranties as service items in the item master(MTL_ SYSTEM_ITEMS). Warranty items have associated coverage terms and conditions which are defined in Service Contracts (OKS). Warranties are associated with serviceable products in Bill of Material(BOM). Products are ordered through Oracle Order Management(OM). Products becomes customer products in Install Base and warranties are created as pre-approved service contracts in OKS through APIs. Please refer to the program design section about how pre-approved service contracts are created for warranties.

The following processes is allowed on warranties:

- View warranty information.

- Exposing warranty coverage information through entitlement engine to other CRM modules.

- Oracle Service Core charges the customer for services provided which are not covered under warranties.

- Update of warranties information using OKS APIs when the customer returns the product, when the product ownership changes or when the installed base splits customer products.

- Following processes are not allowed on warranties in OKS

- Update of warranties information using OKS/OKC UI.

- Billing for warranties in OKS.

Warranties can not be directly authored in Contracts. Instead, you have to use Warranties to able to:

- Define product item - BOM

- Define warranty as item and associate a coverage template - BOM

- Associate warranty to product item - BOM

- Create Warranties when simple serviceable products are ordered

- Update warranties when customer products are transferred, returned or splitted.

- Expose warranties information to other CRM modules

Warranty coverage reflects the service request reporting time stated in days or hours, and the repair expenses. By setting effective start and end dates, you can

phase in or phase out a particular coverage. You can specifically define covered monetary amounts for each service.

Warranties are treated as a component in the serviceable product's bill of material. To define a warranty, you first create it as an item in Oracle Inventory, then add it to the bill of material of a particular serviceable product using oracle bills of material.

The following item attributes cannot be applied to Warranties:

n   Inventory Item

n   Serviceable Product Item

n   Stockable, Transactable, Build-in_WIP item

n   Cycle Count enabled item

n   Shippable item

n   Returnable (Order Entry attribute) item

n   Check ATP item

Understanding Contract Billing

It is important to understand how billing works within Service Contracts so that the information that is created in the billing process can be used to manage individual contracts and groups of contracts. This section discusses the billing process and distinguishes between the different types of billing functions in Service Contracts.

The following topics are discussed:

The Billing Process

Usage Billing

Estimated Billing

Averaged Billing

The Billing Process

The billing function determines the exact amount that is to be charged to a customer for the services specified in the contract. After the billing information has been inputted into Service Contracts, the information is then sent to Oracle Accounts Receivable so that an invoice can be prepared and sent to the customer. The invoice details are then sent from AR to Contracts so that a billing history can be created

and tracked. Billing within Contracts for Service is simply the agreed upon, set price for a service deliverable.

Usage Billing

There are two types of Usage Billing within Service Contracts: Estimated Billing and Averaged Billing.

Estimated Billing

Estimated Billing uses a pre-set, agreed-upon price for the services used.

Averaged Billing

Averaged billing uses an average of the service used during a billing period to be used as the standard pricing for the services that have been agreed upon.Averaged billing requires a minimum of two fully completed billing cycles to use as reference.

Using Service Contracts

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Working with the Launchpad and the Contract Navigator

Use the Launchpad to view contracts in your inbox, recently modified contracts, or bookmarked contracts.

Use the Launchpad and the Contract Navigator tabs to access a variety of functions related to a contract. You can access most of these functions from the Contract Navigator by right clicking on a contract or by selecting Tools->Options from the menu bar.

Select one of the functions in this list for a more detailed procedure.

Functions

Creating a New Contract

Creating a Contract from a Template

Opening a Contract

Creating a New Version

Viewing the History of a Contract

Creating a Change Request

Closing the Change Request for a Contract

Copying a Contract

Creating a Subcontract

Renewing a Contract

Changing the Status of a Contract

Extending a Contract

Extending a Contract Line

Terminating Contract Lines

Viewing the Schedule

Communications

Authoring Contracts

Creating a New Contract

You can create a new contract manually or from a template. Use this procedure to create a new contract manually. For more information on the Authoring Screen and creating a contract, see Authoring Contracts

Prerequisites

None

Steps

1. In the Navigator, select Launchpad. The Launchpad screen opens.

2. Select the Contract Navigator Tab.

3. Right-click to display a popup menu, select **New**.

4. Click **Create a new Contract Manually.**

5. Select a category from the list of values.

6. Click **Create**. You now are in the Authoring Screen.

Creating a Contract from a Template

Use this procedure to create a contract from a template. For more information on the Authoring Screen and creating a contract, see Authoring Contracts

Prerequisites

None

Steps

1. In the Navigator, select **Launchpad**.

2. Select the Contact Navigator tab.

3. Right click and select **New** from the list of options.

4. Click **Create a Contract from a Template.**

5. Select a template from the list of values.

6. Optionally, click the **Find** button to find an existing template.

   a. In the Search Templates Window you can enter criteria to find templates.

   b. Select a template and double-click to open it, or click **Open**.

7. Click the **Create** button. You now are in the Authoring Screen.

Opening a Contract

Use the procedure to open a contract. For more information on the Authoring Screen and creating a contract, see Authoring Contracts

Prerequisites
None

Steps

1. In the Navigator, select **Launchpad**. The Launchpad screen opens.

2. Select the Contract Navigator tab.

3. Select a contract group.

4. Right-click a contract to display a popup menu, select **Open**. The Authoring Screen is displayed.

Creating a New Version

Use this procedure to create a new version of a contract.

Prerequisites
None

Steps

1. In the Navigator, select **Launchpad**. The Launchpad screen opens.

2. Select the Contract Navigator tab.

3. In the left window, select a contract group.

4. Right-click a contract to display a popup menu, select **Create New Version.** This creates a new version of your contract.

Guidelines

When you create a new version, the digit in front of the period (the main version), is increased by one. The minor version is reset to zero.

Viewing the History of a Contract

Use this procedure to view older versions of a contract.

Prerequisites

None

Steps

1. In the Navigator, select Launchpad.

2. In the Contract Navigator, select a contract group.

3. Double click on the contract for which you want to see a previous version. A summary window appears.

4. Select the **History** tab.

5. In the Select list, select the **Contract Versions** to see all versions. All major versions are displayed.

5. Select the version you want to open.

6. Click **Open**.

   You now can view the version of the contract.

Creating a Change Request

Change Requests are a formal way to document changes to a contract. A request is approved by the approver defined in the workflow definition of the change request. Once your change request is approved, the administrator entered in the change request receives a notification that he/she can change the contract.

An internal key gives the change request administrator update access to the contract. When the administrator changes, it is locked for other change requests until the change request is closed. See Closing the Change Request for a contract.

Use the procedure to create a change request.

Prerequisites

The contract must be in status active, and no other change requests may be in progress.

Steps

1. In the Contract Navigator, select a contract group.

2. Select the contract you want to change.

3. Right click on the contract. A popup list appears.

4. Select **Create Change Request** from the popup list. The **Create a Change Request** Window opens.

5. Enter the requestor's name and add a description for the approver.

6. Enter the administrator's name. This person will receive an workflow notification when changes are ready to be made.

7. Enter the request date, and optionally, modify the request date and/or effective dates.

8. Record the lines where you are requesting a change and the exact nature of the change.

9. Select the **Version** checkbox if you want to version the changed contract.

10. Record if a signature is required and add any other parties and when they approved the changes.

Closing the Change Request for a Contract

When you receive a notification to apply changes, open the contract and apply the changes as described in the change request notification.

Once you start editing the contract, you automatically lock the contract for other users with an approved change request.

Use this procedure to complete the changes and unlock the contract.

Prerequisites

None.

Steps

1. In the Navigator, select **Launchpad.**

2. Select the Contracts Navigator tab.

3. Select the contract for which you have applied the changes

4. Double-click on the contract to open the Execution window, and from the History tab select the change request.

5. Optionally, right click on the contract and select Change Request from the popup list. This opens the change request menu where you can then query for a change request.

6. Enter the current date in the Apply Date field and save your entry. That closes the change request and releases the lock on the contract.

Copying a Contract

There are several ways to copy a contract, parts of a contract, or multiple contracts.

Prerequisites

None.

Steps

1. There are several ways to navigate to the copy window:

    -   In the Contract Navigator, select a contract group, a contract, and select Copy from the popup list.

    -   Open an existing contract, and in the Authoring window, select **Copy from Contract/Template** from the Action menu.

2. In the Copy Window, enter the new contract name, and optionally, a contract modifier.

3. From the left side, select the contract or part of the contract you want to copy.

4. Click the double right-arrow button to move the existing contract or parts on the left side to the right side. Anything on the right side is considered part of the new contract.

5. Click the double left-arrow button to move a new contract or parts of a contract back to the existing contract area on the left side.

6. Click **Create**. Your new contract with copied contract information is now saved.

7. You can then make changes to the newly created contract in the same way that you would when authoring a contract.

Creating a Subcontract

In order to fulfill obligations of an existing contract, a party may need to establish a new contract with third parties to provide some or all of the items (or materials, or deliverables, etc.) required in the original contract. This is called creating a subcontract. You can copy a contract or elements of a contract into a subcontract. Use this procedure to create a subcontract.

Prerequisites

A finalized, active contract has to be in place.

Steps

1. In the Contract Navigator, select a contract group.

2. Right-click a contract to display a popup menu. The Tools menu also has these options.

3. Select **Subcontract** from the popup menu. The **Subcontract** window opens.

4. On the right side, enter the name and optionally a modifier of the new contract.

5. Select a category for the new subcontract.

6. Optionally correct the intent and enter the perpective of the contract.

7. Click the Keep References Checkbox if you want to reference to the subcontracting contract instead of copying components. You cannot change referenced components in the new subcontracted contract.

8. Highlight the desired components in left navigator, click the '->' button and click on the 'Create' button in the subcontract components selection popup.

You can make changes to the new contract in the Contract Authoring screen.

Renewing a Contract

A renewed contract does not affect the current contract, but rather it creates a new contract by copying the current contract. By choosing a new date range that must start after the expiration date of the current contract, you renew a contract. Use this procedure to renew a contract.

Prerequisites

None

Steps

1. In the Contract Navigator, select a contract group.

2. Right-click a contract to display a popup menu. The Tools menu also has these options.

3. Select **Renew** from the popup menu to open the **Renew** Window.

4. To keep the new contract distinguishable, the modifier is defaulted to the current date. You can change the modifier to another value.

5. The new start date is defaulted to the date following the end date of the current contract. Either select an end date for the renewed contract or enter values for duration and period. For example, to renew a contract for six months, enter 6 in the duration and select month in the period field.

6. Click **Renew.**

Changing the Status of a Contract

The current status determines the operations allowed against the contract and the status type you can change the contract to. For more information, see Understanding Status and Operations. Use this procedure to change the status or status type of a contract.

Prerequisites

None

Steps

1. In the Contract Navigator, select a contract group.

2. Right-click a contract to display a popup menu, select **Change Status**. The Change Status Window appears.

3. Select the new status from the list of values.

Extending a Contract

This only changes the end date of a contract. The contract then is scheduled to expire on the new end date. Use this procedure to extend a contract.

Prerequisites

None

Steps

1. In the Contract Navigator, select a contract group.

2. Right-click a contract to view the popup menu. The Tools menu also has these options

3. Select **Extend** from the popup menu to open the **Extend** window.

4. Either select a new end date for the contract or enter values for duration and period. For example, to extent a contract for further six months, enter 6 in the duration and select month in the period field.

5. Click **Extend**.

Extending a Contract Line

Extending a line changes the end date of a contract. The extended line then is scheduled to expire on the new end date. Use this procedure to extend a line on an active contract.

Prerequisites

None

Steps

1. In the Contract Navigator, select a contract group.

2. Double click on a contract to see the overview.

3. Select the line you want to extend.

4. Right click to open the popup menu. Select **Extend** to open the **Extend** window.

5. Either select a new end date for the line or enter values for duration and period. For example, to extent a contract line for further six months, enter 6 in the duration and select month in the period field.

6. Click **Extend.**

Guidelines

If you extend a contract line beyond the end date of a contract, the end date of the contract is automatically updated to the end date of the extended line.

Terminating a Contract

Use this procedure to terminate a contract that is active or effective and on hold.

Prerequisites

None

Steps

1. In the Contract Navigator, select a contract group.

2. Right-click a contract and a popup list appears.

3. Select **Terminate** to open the **Terminate** window.

4. Enter a termination date and a termination reason.

5. Click **Terminate.**

Guidelines

If you want to add more reasons for a termination, your system administrator can add more options in the Lookup Codes, see Defining Termination Reasons.

Terminating Contract Lines

Use this procedure to terminate a contract line in an active contract. If you want to add more reasons for a termination, your system administrator can add more options in the Lookup Codes, see Defining Termination Reasons.

Prerequisites

None

Steps

1. In the Contract Navigator, select a contract group.

2. Double-click on a contract to see the overview.

3. Select the line you want to terminate.

4. Righ-click to open the popup menu. Select **Terminate** to open the **Terminate** window.

5. Enter a termination date and a termination reason.

6. Click **Terminate.**

Viewing the Schedule

Use the Schedule to get an overview of events scheduled.

Steps:

1. Navigate to **Launchpad.**

2. Select the Contract Navigator Tab.

3. Select the contract for which you want to see scheduled tasks or completed outcomes.

4. Double-click on the contract and then select the Schedule tab.

Communications

The Communications tab allows you to record and view commmunications between the parties within a contract. Such communications can range from phone calls through e-mails to formal letters sent.

Prerequisites

None.

Steps

1. In the Navigator, select the **Launchpad.**

2. Select the Contract Navigator Tab.

3. Select the contract for which you want to see or enter communications.

4. Double-click on the contract and select the Communications tab.

Authoring Contracts

From the Authoring Contracts screen, you can create or modify a contract.

> **Important:** Before selecting a tab from the contracts screen, you must enter general contract information in the header area:
>
> n   Contract number: enter the contract number in this field
>
> n   Modifier: Use this option if the contract number you have chosen already exists to distinguish contracts with a contract name otherwise the same.
>
> n   Select an intent - buy or sell -.
>
> n   Enter an end date
>
> n   You must at least enter one Group name in the details sub tab.

You can perform the following functions from the Authoring window:

Entering Summary Information

Entering Contract Parties

Specifying Contract Line Item Information

Entering Article Information in a Contract

Managing Rules

Checking the Contract

Submit for Approval

Conditions

Entering Summary Information

The Summary tab has three subtabs: Text, Details, and Administration.

Using this subtabs you can do the following:

- Text subtab: Enter comments that may contain special or important instructions. You can also enter a description.

- Details subtab: Enter the Quality Assurance procedure and you can add groups.

- Administration subtab: Enter the approval workflow and provide access to other groups or persons

You can also enter condition types and actions, quality check a contract or submit it for approval using the buttons at the bottom of the window.

At any time, you can check if your contract passes quality assurance. The result of the on-line quality assurance check is displayed as soon as it completes. There is no need to run the quality assurance before you can submit the contract for approval, since the quality assurance is automatically run before submitting for approval.

Use this procedure to enter summary information.

Prerequisites

None.

Steps

1. In the Effective region of the Summary tab, enter this information:

    - Intent (buy or sell)

    - Perspective

    - Start and end dates

2. In the Details tab, enter the approval workflow information.

    a. Choose QA Checklist from the list of values. You may select another QA checklist, however, Contracts automatically executes the default checklist in addition to your own checklist.

    b. If it applies to the contract, select **Auto Renew.** You must also provide the number of days before the contract is automatically renewed by a concurrent program.

    c. Select a group. You must assign the contract to at least one group.

3. In the Administration you select your approval workflow. You can give access to groups or contract users in the Access region.

Entering Contract Parties

In the Parties tab, you can list all the personnel involved with the creation and management of the contract. The Parties tab also contains all the relevant sales contacts information. The information you enter here depends on the category and intent. Use this procedure to enter contract parties.

Prerequisites

None.

Steps

1. Navigate to the Parties tab.

2. Enter the role information.

3. Enter the name. You may add an alias or a 'known-as' identifier.

4. Navigate to the Affirmative Action region.

5. Enter the minority group, if applicable.

6. Enter the small business, if applicable.

7. Enter the woman-owned information if applicable.

8. Navigate to the Party Contacts region to enter a contact, sequence, and a name of the contact. The sequence determines order the contacts should appear.

Specifying Contract Line Item Information

In the Line Items tab, you can detail all the contract line items, which are the contract deliverables and relevant items. You can enter more than one item per contract line on the line items tab in the subline region. For more information on lines, see Understanding Line Styles. Use this procedure to enter details for a line item.

Prerequisites

None.

Steps

1. In the Level region, provide the information for Line #.

2. Enter the line style and a number for the Display Sequence.

3. Depending on the line style definition, you may enter the description or select a description from the list of values.

   > **Note:** If the your line item is priced at the top level, you can enter qantity, unit of measare and price information.

4. Enter the unit of measure.

5. Enter the unit price. The extended price is calculated from the quantity time the unit price. The negotiated price allows you to override the extended price.

   > **Note:** The Line Items tab has four subtabs: Sublines, Items, Rules, and Parties. You can use the subtabs to add and exclude data specific to a line.

6. Optionally, depending on the line type you selected, use the Sublines tab to enter more detail in the sublines.

   You can actually build an infinite level of sublines. This window allows you to view and edit the hierarchy at any level. Navigate through levels by using the Drill Up and Drill Down buttons.

7. Use the Items tab to store more details about an item. Use the exeption flag to document, that an item may be excluded from the contract line.

8. Enter rules on lines the same way rules are entered on the contract.

9. Use the Parties tab to add line specific information that is not valid for the entire contract. Entering a party in a subline is similar to entering a party information for the contract.

Entering Article Information in a Contract

An article is the text that describes and details the terms and conditions that are attached to a contract.You can enter two kinds of articles while authoring a contract: standard and nonstandard articles.

These are types of articles you can enter:

Entering a Standard Article

Entering a Non-Standard Article by copying a Standard Article

Entering a Non-Standard Article

Use these procedures to enter contract articles.

Entering a Standard Article

Use this procedure to enter a standard article.

Prerequisistes
None.

Steps
1. In the Article window, leave the standard flag checked.

2. Click on the name field, select the article list from which want to select an article.

3. Double-click on the article set and select an article. If you know your article, you can type in fragments of the article to reduce the list of values matching your search criteria. This second method by passes the navigation through article sets.

4. Reference an article from the article list. You can add variations in the text field when you click **Show Text**.

Entering a Non-Standard Article by Copying a Standard Article

Use this procedure to copy and existing standard article and modify it.

Prerequisities
None.

Steps
1. In the Article window, leave the standard flag checked.

2. Click the name field, and select an article set from the drop-down list.

3. Double-click on the article set and select an article. If you know your article, you can type in fragments of the article to reduce the list of values matching your search criteria. This second method by passes the navigation through article sets.

4. Copy an article from the article list. You can modify the text when you click **Show Text**. The standard flag is automatically unchecked when you choose to copy an article instead of referencing it.

Entering a Non-Standard Article

Use this procedure to enter a non-standard article.

Prerequisites

A contract must have been created, even if it is only in its initial authoring stages.

Steps

1. Deselect the Standard checkbox.

2. Enter a name to describe your non-standard article.

3. You can enter the article text when you click **Show Text**.

> **Note:** It is important to note that as part of the initial set-up of the **Standard Article** feature, you can set and define rules. So whenever you use a **Standard Article** within a contract in any way, all rules that have been associated with the **Standard Article** are copied into the new contract being authored.

Entering Rules

In the Rules tab you can add rule groups. Edit the rules using the Edit button. You can use the Rules Editor to add, change, or edit rules at any level that the rule is instituted at. Use this procedure to add rule groups and edit rules.

Prerequisites

None

Steps

1. Click **Edit Rules** from either the Rules tab of the contract, the rules tab of the line items or from the articles tab. The Rules Editor appears.

2. Select a rule group from the list of values.

3. A tab with the the rule group name is displayed in the rules editor. Fill in the fields. A rule group may have more than one rule. When you close the editor, each rule and its contents are displayed in one line.

4. The optional flag is a display-only field to indicate if the rule is a mandatory or optional entry.

5. Only for billing rules the Party button is relevant. Use this function to mark the billing subject (the billing party) or the object (the billed party).

Checking the Contract

Click the **Check Contract** button to run an on-line quality assurance (QA).

At any time, you can check if your contract passes quality assurance. The result of the on-line quality assurance check is displayed as soon as it completes. There is no need to run the quality assurance before you can submit the contract for approval.

Submitting for Approval

Click the **Submit for Approval** button to submit the contract for approval.

When you submit a contract for approval, quality assurance is automatically executed. The contract is only submitted if it passes quality assurance. The result of the on-line quality assurance check appears as soon as it completes. You then may choose to continue with the submission.

Using Conditions

Click **Conditions** to specify conditions for the contract. For more information on Conditions, see Understanding Events.

You now can either copy condition templates into your contract or you can create a new contract specific condition.

Copying from a Condition Template

Use this procedure to copy a condition template into your contract.

Prerequisites

None

Steps

1. Select **Copy From Template** from the Actions Menu.

2. Enter the condition template name or Open the list of values to see the Condition Template window. Select your condition template.

3. Modify or amend the condition for the current contract.

Creating a Contract Specific Condition

Use this procedure to create a contract specific condition for your contract.

Prerequisites

None.

Steps

1. Enter a name and a description.

2. Check **Create a Task** if you want to create a task for the CRM Task Manager. Creating a task requires entering a task owner.

3. Check the condition type. For Action you must enter an action, for Date you must enter the number of days, qualify before or after, and you must enter the triggering date.

4. For condition of type action choose if the event is evaluated only once or each time the condition is met. For example: Check the flag if you want to evaluate the condition to true only if the counter exceeds 1,000 for the first time. Leave the flag unchecked if you want the condition to evaluate to true each time the counter reaches 1,000.

5. Build your condition lines.

   Each condition may consist of one or many condition lines, with the sequence determining the order in which the lines are processed. You can enter Expressions, Counter or Function lines.

Expressions:

The left value only allows you to enter attributes defined in the action attributes.

Counter:

Select Product or Service and choose a description of the service or product. If you select a counter group, then your left value's List of Values lists counter group types. If you choose a counter group master, then your left value's List of Values shows the related counter groups.

Functions:

Select Functions declared in the Process Definitions Window. To enter fix values for parameters, click the **Parameter** button.

6. Display the condition lines and check validity.

   Click on **Show Condition** to display all condition lines and check their syntactical validity on-line. The checkbox valid is display-only and gives you a quick overview if the condition has validated successfully.

7. Enter **Outcomes** defined in the Process Definitions Window.

8. Click **Paramater** to assign fixed values or action attribute values to the outcome parameters.

Using and Defining Coverage

Coverage Times — the days of the week and hours during the day that the customer can request service.

Reaction Times — the amount of time allowed before action must be initiated for a particular process being requested.

Billing Types and Rates — for each Transaction Group, define what types of billing are allowed, with limits, as well as labor rates.

Prerequisites

All of the following data must have been put into the system:

▫ Service Contract Coverage Template Header. All Service Coverage Templates have a common parent: Service Contract Coverage

▫ Template Header, that is implemented as a Contract Header. Its presence is essential for the Service Coverage Templates creation.

- Contract Line Style. Each Contract Line has to have an associated Contract Line Style. The Line Style describes the meaning of the Contract Line. For example: service, coverage or business process.

- The Line Styles must be seeded before a Contract Line (Coverage) can be created.

- Rule Definition. Each Contract Rule must be classified by a Rule Definition that serves as a Rule Type. For example: price list, discount, etc.

- Rule Group Definition.The Rule group definition groups all rules related to a Contract Line that share the same business character. For example: billing and timing.

- Contract Item Types. Each Contract Item requires a Contract Item Type to classify the Item. Examples: inventory item, business process, business transaction, etc.

Steps

1. Navigate to the Coverage Setup from the Summary View.

2. Enter the **Start** and **End Dates.**

3. Check the **Suitable as Exception** box if applicable.

4. Select the **Business Process**.

5. Enter the **Duration** information.

6. Enter the **Period** to be covered.

7. Enter the **Start Date** of the offset.

8. Enter the **End Date** of the offset.

9. Enter the **Price List**.

10. Enter the **Discount** amount.

11. Select the Reaction Times tab.

12. Enter the season **Name**.

13. Enter the Severity level.

14. Designate the Workflow.

15. Select the Work Through and Active boxes, if applicable.

16. Input the reaction time requirements for each specific day of the week.

17. Select the Billing Types tab.

18. Indicate the **Billing Type**.

19. Enter the **Up To Amount.**

20. Enter the **% Covered**.

Defining Quality Assurance Standards

You can use Quality Assurance Standards to make sure that the published contract meets certain guidelines. Guidelines might include a list of deliverables or attributes or a range of quantitative values.

Prerequisites
None.

Steps
1. Navigate to the **Folder** menu. Select **Set Quality Assurance Standards**.

2. Select **QA List**. A set of different lists appears. Select the list that seems to best suit your contract's needs. Select the particular list and then the individual item on the list. Select **Apply>Global** or **Apply>Contract/Group**.

If you select **Global** then every contract must pass the QA standard that has been chosen. If this is what you want to do, then:

1. Select **Apply>Global**.

2. You are prompted with the message, "QA Standard will apply to ALL Contracts. Apply to all?" Select **Yes**.

If you want to apply the QA check to a particular contract or group

1. Select **Apply>Contract/Group** after having navigated to the QA List.

2. Put in the contract or contract group number.

3. Select **Apply>AcceptQAVersion.**

Guidelines
Not all contracts require or have QA standards. Contracts comes with a pre-set list of QA checks. Items on the list can be used as is or custom sets can be put together with a mix of pre-set checks and newly created ones.

Authoring in Contracts for Service

Authoring is the most basic and most important aspect of Contracts. It lets you create a contract--either from scratch or by using an existing contract to copy or work from. Almost every other function of Contracts is dependent on this initial authoring phase.

Summary Tab

The Summary tab is one of the two main tabs within the Contract Navigator. There are four main tabs within the Summary tab window: **Parties**, **Pricing and Billing**, **Administration**, and **Text**.

You can perform the following tasks from the Summary tab:

Entering Parties Information

From Parties subtab you can enter the contract party information as well as the billing and shipping address.

Entering Pricing/Billing Information

From this subtab you can associate Pricing nd Billing rules to the contract.

Managing Administration Information

From this subtab you can enter the workflow and contract group information.

Entering Text

From this subtab you can enter comments that may contain special or important instructions.

Parties Subtab

On the **Parties** tab, you can list all the personnel involved with the creation and management of the contract. The **Parties** tab also contains all the relevant sales contacts information.

Pricing and Billing Subtab

With this subtab, you can set header level default values that automatically apply to the lines/services of the contract (though you can override these values at the line and service level if so desired).

The values defined on the Pricing and Billing subtab include the required billing profile and the preferred payment method for the customer. Some values are defaults set by the agreement definition.

Billing profiles are used to define the specific customer billing requirements. The default customer profile values are provided by the profile definition. See Managing Contracts Base Data.

Prerequisites

None

Steps

4. Navigate to the **Summary**>**Pricing Billing** Subtab

5. Enter **Agreement**

6. Enter **Price List**

7. Enter **Currency**

8. Enter **Accounting Rule**

9. Enter **Invoicing Rule**

10. Enter **Payment Terms**

11. Enter **Discount**

12. Enter **Service Charges** information.

13. The **Tax Exemption** region requires the **Status**, **Certificate**, and **Reason** to be inputted.

14. Specify the type of Contract Billing **Preference** and **Method**.

15. Supply the **Interval** and **Offset** information.

Administration SubTab

Provide the **Workflow Type**. Choose the **Process Name**. Indicate whether the contract is active by checking the **Active** box.

Text Subtab

Allows for a summary description of some of the contract information.

Prerequisites

None.

Steps

1. Navigate to the Summary>Text Subtab.

2. Provide Comments.

3. Provide a Description

4. Provide information for the Renewal Note, if applicable.

5. Provide the Termination note, if applicable

Lines Tab

On the **Lines** tab, information that has an effect on service contract lines can be entered. The **Line** tab has five subtabs: **Effectivities, Pricing/Products, Billing, Counters, Events,** and **Billing History.**

Effectivities Subtab

The Effectivities Subtab provides the effective dates of the line item service coverage being contracted.

Pricing/Products Subtab

The Pricing/Products Subtab provides pricing and coverage level information.

Billing Subtab

With the Billing subtab, you can provide billing information for individual contract lines when the default billing information established at the contract header level does not apply, billing Services independently.

Effectivities SubTab

Prerequisites

None.

Steps

1. On the **Line >Effectivities** subtab provide the **Line Type**.

2. On the **Line >Effectivities** subtab provide the **Start Date**.

3. Enter the **End Date**.

4. Enter the **Description**.

5. Enter the **Duration**.

6. Enter the **Period**.

7. Provide the information for **Service/Usage**.

8. Enter the **Status**.

Pricing/Product SubTab

There are two main methods for the pricing of Services: Service-based Pricing and Percentage-based pricing. The pricing information comes from Order Entry. The process works this way: first, a price list is associated with a contract. When Services are entered into a contract, a price can be retrieved from OE either as a List Price or as a percentage.

Prerequisites:

A contract must be finalized.

Steps

1. On the **Lines**>**Pricing/Product** subtab navigate to the **Covered Levels** region**.**

2. Enter **Level** information.

3. Enter covered level **Name**.

4. Provide the **Quantity** information.

6. Provide the **UOM**.

7. Enter the **Unit Price**.

8. Enter the **Final Price**.

Billing SubTab

Prerequisites

A finalized contract must exist.

Steps

1. On the **Lines>Billing** subtab, navigate to the Contract Billing region.

2. Choose a **Preference**.

3. Select a **Method**.

4. Provide the information for **First Bill Dates**.

5. Provide information for the **Billing History** region.

6. Provide information for the **Billing Schedule** region.

With the Contract Search, you can search for a contract by any number of variables. The Contract Number, Stage, Variety, Group, Invoice Number, Invoice Date, and the From and To Effective Dates are the information fields that the Contract Search tab contains.

Using Coverage

You can perform the following tasks from the Coverage window:

Entering Coverage Dates

The Coverage Times subtab specifies the dates and times that the coverage spans.

Entering Reaction Time Criteria

In the Reaction Time subtab, you can enter the coverage reaction time.

Entering Coverage Type

In the Preferred Resources subtab, you can enter the coverage type and name**.**

Entering Billing Rates

In the Billing Types subtab, you can specify the labor billing rates, billing types, and percentage covered.

Coverage Times Subtab

Navigate to the Coverage time subtab and enter the **Start** and **End** times for each calendar day.

Reaction Times (Hour) Subtab

Reaction time is the agreed upon time period within which a service provider must react to a problem covered by the contract, depending on the severity of the problem.

Prerequisites

A usage contract must be finalized.

Steps

1.   Navigate to the Reaction Time (Hour) subtab.

2.   Enter the contract **Name**.

3.   Enter the **Severity** information

4.   Click on the **Work Through** box if applicable

5.   Click on the **Active box** if applicable

6.   Check the calendar days that apply to the reaction time coverage

Billing Types Subtab

The Billing Types subtab specifies the labor billing rates, billing types, and percentage covered. Enter the **Billing Type**, then the **Up To Amount**, and the **Percentage Covered**.

In the **Billing Rates (Labor)** region of the Billing Types subtab, enter the billing rate **Name**, **Flat Rate**, and **Percentage Over List Price** amount.

Setting up Coverage Templates

Prerequisites

None.

Steps

1.   Navigate to the **Coverage** region on the Coverage screen.

2.   Enter the contract **Name**.

3.   Enter the contract **Type**.

4.   Put in the **Effective Dates**.

5.   Enter a **Brief Description**.

6.   Enter the **Exception** information.

7. Click on the **Warranty** box if applicable.

8. Enter the **Inheritance information.**

9. Click on the **Free Upgrade**, **Transfer Allowed**, and **Suitable as Exception** box if applicable.

The **Business Process** functions are on the coverage tab and they must be filled out before entering information in any coverage tab.

1. Navigate to the Business Process region on the Coverage tab.

2. Fill in the **Business Process**

3. Enter the **Offset Duration** information

4. Enter the **Offset Period**

5. Enter **Price List** information

6. Enter the **Discount**

Using Coverage

Coverage Times — the days of the week and hours during the day that the customer can request service.

Reaction Times — the amount of time allowed before action must be initiated for a particular process being requested.

Billing Types and Rates — for each Transaction Group, define what types of billing are allowed, with limits, as well as labor rates.

Prerequisites

All of the following data must have been put into the system:

Service Contract Coverage Template Header

All Service Coverage Templates have a common "parent" - Service Contract Coverage

Template Header, that is implemented as a Contract Header. Its presence is essential for the Service Coverage Templates creation.

Contract Line Style

Each Contract Line has to have an associated Contract Line Style. The Line Style describes the meaning of the Contract Line. For example: "service", "coverage" or "business process."

The Line Styles must be seeded before a Contract Line (Coverage) can be created.

Rule Definition

Each Contract Rule must be classified by a Rule Definition that serves as a Rule Type. For example "price list", "discount", etc.

Rule Group Definition

The Rule group definition groups all rules related to a Contract Line that share the same business character. For example: "billing", "timing".

Contract Item Types

Each Contract Item requires a Contract Item Type to classify the Item. Examples: "inventory item," "business process," "business transaction," etc.

Steps

7. Navigate to the Coverage Setup from the Summary View.

8. Enter the **Start** and **End Dates.**

9. Check the **Suitable as Exception** box if applicable.

10. Select the **Business Process**.

11. Enter the **Duration** information.

12. Enter the **Period** to be covered.

13. Enter the **Start Date** of the offset.

14. Enter the **End Date** of the offset.

15. Enter the **Price List**.

16. Enter the **Discount** amount.

17. Select the Reaction Times tab.

18. Enter the season **Name**.

19. Enter the Severity level.

20. Designate the Workflow.

21. Select the Work Through and Active boxes, if applicable.

22. Input the reaction time requirements for each specific day of the week.

23. Select the Billing Types tab.

24. Indicate the **Billing Type**.

25. Enter the **Up To Amount.**

26. Enter the **% Covered**.

Renewing a Contract

When a new renewal is initiated, Contracts can be setup to trigger a new contract approval process. A contract can only be renewed at the header level. Renewals are most efficiently carried out in bulk, that is, when there are large numbers of them to execute.

Subcontracting Component Parts of a Contract

You can subcontract isolated parts of a contract.

Prerequisites

None.

Steps

1. Navigate to the Summary View screen.

2. Enter the contract number of the contract wanted. A pop-up menu comes up.

3. Choose **Subcontract**.

4. Query for the desired contract in the query find and press 'Ok' button.

5. In the contract number field enter the contract number for the new contract.

6. In the left navigator window highlight the lines or sub lines which needs to be subcontracted

7. Click the '->' button and click on the 'Create' button in the subcontract components selection popup.

Guidelines

If you want to select some more components from a different contract for sub contracting, press the find button and that invokes a query find. Select the desired contract from the query find to display it in the subcontract component selection

popup. Select the components and press right arrow button to move the selected components to the new contract. When you click the 'Create' button, the subcontract process starts.

After successful completion of the subcontracting process, a subcontract pop-up presents a dialog box asking you whether to open the subcontract or not. If you click open the contracts authoring screen with the new contract information, you are prompted to make changes to the copied contract. If the cancel button is clicked, you navigate to the contracts summary view (of the launchpad).

Using Conditions

Prerequisites
A finalized contract must be in place.

Steps

If you select the **Conditions** button, you need to enter the following information:

Steps

1. In the Condition Type region, enter the **Action** information

2. Choose **Date**

3. Check **Evaluate Once only** if applicable

4. In the **Outcomes** region, provide the Outcomes and Comments information.

There are three subtabs within the Summary>Details>Conditions subtab: Expression, Counter, and Function

In the Expression subtab, enter the Left and Right Operator values

To use the Counters subtab you must provide a **Description.**