IFS FSM™ CONTRACTS & FINANCIAL MANAGEMENT

IFS ESSENTIALS COURSE – IFS FSM 6

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SENIOR BUSINESS SYSTEMS ANALYST

IFS ACADEMY

This is the agenda for the week's course.
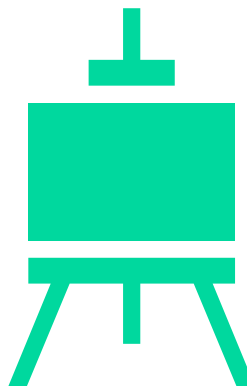This morning is highlighted in the green box

OUR TRAINING APPROACH
HOW WE LIKE TO DELIVER TRAINING

Learning Activities

Facilitator-led instruction
System Demos
Take home Exercises
Knowledge Tests

LEARNING ACTIVITIES
Facilitator-led Instruction
We try not to do too much of this, but it's inevitable that some of that we do during the course will involve me taking you through some slides and providing some information about how the system is structured, is designed to work and to show you how to configure the solution.

System Demos
Then, of course, we'll show you what this looks like in the system so that you can fully appreciate what we've been talking about

Hands-On
The most important part of what you'll do while you're here is get the opportunity to do some hands-on work in the training environment. This will always be a bit artificial compared to what you'll do back in the real world, but it's really important to have a go

Activities
These will be designed to give you a break from the screen and add a bit of fun!

Review sessions
This is where we'll aim to consolidate the learning that we've covered and make sure everyone has the basis they need to move on to the next steps

Knowledge Tests
Nothing heavy, just a little self-assessment so that you can check your learning progress and understand where your knowledge gaps are

LEARNING APPROACHES

Outcomes-based
For each lesson we'll set out, at the beginning, what we anticipate you'll be able to do by the end of the course – this means we're focused on what you'll be able to do with the training, not just on the training itself

Field service context-based
Field service is quite a distinctive business area and if you understand a bit about that context, it will really help you to appreciate what IFS customers are looking for when they implement this solution

Practically, functionally-based
We want to teach you things that are useful; whilst the code behind the scenes might be interesting to some, this course is about a practical, functional knowledge base that will allow you to implement the solution

Peer learning
There are people here from different backgrounds, with different experiences; if you get the opportunity to hear and share some of that, you'll find it makes the course more useful and more interesting

CONTRACTS

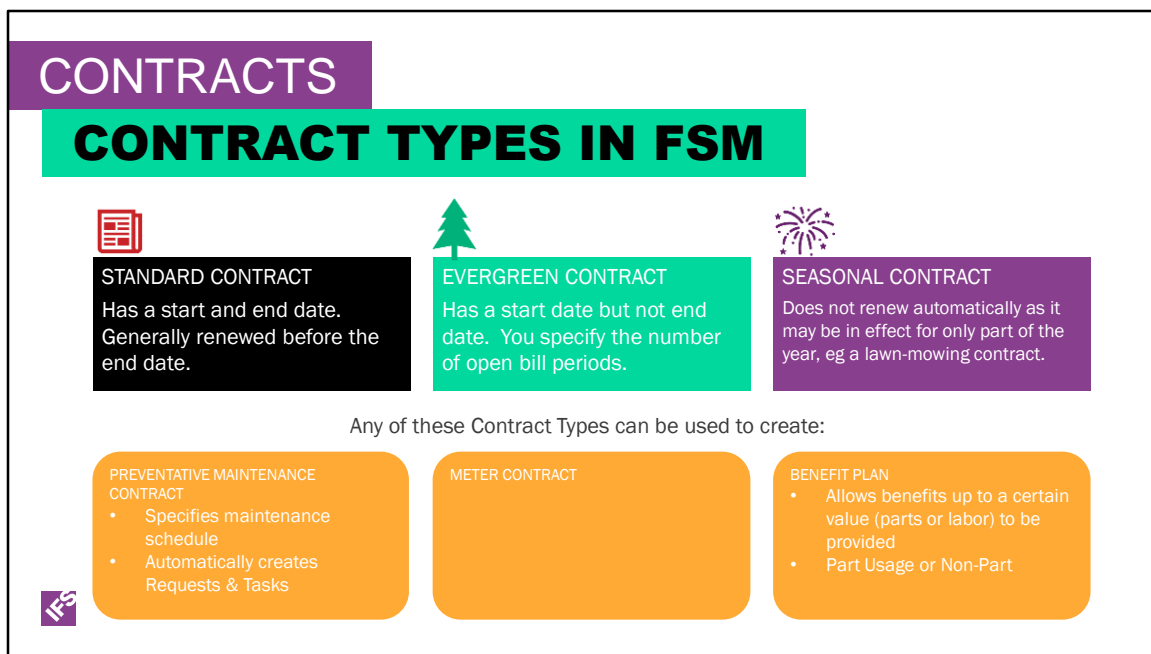## LEARNING OUTCOMES

By the end of this lesson, you should:
- Understand the process flow for Contracts
- Understand the various contract types available in FSM
- Understand basic Contract setup and its Important fields
- Understand about the Entitlements & Benefit plans
- Understand the setting up and usage of Invoicing Rules and contract types

CONTRACTS INTRODUCTION

5.

Contracts are set up for SLAs, billing, specify items covered, specify meter plans, and specify preventative maintenance plans.

The slide shows a standard contract process flow. Reflected in FSM by the Contract Status field

You can create three variety of contracts:

Standard contracts have a start date and an end date. They are generally renewed before the end date and become effective the day after the end date.

Evergreen contracts have a start date but no end date because they do not expire and are therefore not renewed. You specify the number of open bill periods.

Seasonal contracts do not renew the day after the previous contract ends. For example, you might create a contract to service lawn care equipment over the course of a northern growing season, from April to October. Therefore, the contract might be effective from April 1 to October 31. In addition, there is a need to allow for PMs to create a PM Schedule outside of the term of coverage, in order to accommodate business processes as inspections prior, or shutdown procedures after the Contract term has expired.

There are two (2) choices for calculating seasonal Contracts: dynamically calculating based on current dates and static month and day restarts. We will discuss the set up of each in the next slides.

Preventative Maintenance and **Meter** contracts can be created from a standard, evergreen or seasonal contract. PM contracts specify PM schedules. After PM generation, requests and tasks are automatically created. Meter contracts are used to define how to price the metered items. We will discuss PM contracts in a later lesson. We will discuss meters and meter contracts in another course.

A **benefit** can be for part or labor and expenses (usage) or a volume of activity (number of requests opened in a given time period). A benefit Contract allows a benefit to be applied before or after the threshold. You can also specify the period in which the usage is counted. A **benefit Contract** can be a standard, evergreen or seasonal Contract. For example, benefit Contracts can include two hours of telephone support per month or $2000.00 of parts per year and charge full price for the remaining. Benefit Contracts are set up using Benefit Plans. FSM has two benefit plans – Part Benefit Plans and Non Part Benefit Plans. Once set up, these plans are then associated to the Contract type which in turn is applied to the Contract.

The next few slides explain how to set up Part and Non-Part Benefit Plans.
You can set up benefit plans for part usage. You can set up benefit plans for non-part usage.
Or, you can set up benefit plans based on combined part usage and non-part usage. The result of bundling parts and labor into the same benefit plan allows for easier management of plan. You can set up the following types of benefit plans:
Combined usage—sum of part and non-part quantities or amounts
Request volume—the number of requests within a period
Task volume—the number of tasks within a period
Project volume—the number of projects within a period

A Person is an individual who can log into FSM to maintain Contracts. There are some significant fields on the Person record that can affect Contracts.

Contract Post Gr(ou)p is a default that is assigned to a new Contract created by this person. It is usually used for billing and can be used for classification and reporting purposes.

Alt Approver determines the Contract personnel who can approve in place of the approver when using simple approvals.

Approval Limit determines the maximum dollar amount the Contract personnel can post for a Contract, purchase order, or quote, as specified using the ENABLE_APPROVALS application parameter. This limit applies to simple approvals only.

Approver determines the person who can approve a Contract, purchase order, or quote whose monetary value is higher than the approval limit when using simple approvals.

There are some significant tabs on the Person record that can affect Contracts.

Roles are used to identify the menus, screens and functions that a Contract personnel cannot access. You do not necessarily want your Contracts personnel to have Inventory functions.

A Person is an individual who is assigned to perform the Contract services.
There are some significant fields on the Person record that can affect Contracts.

Dispatchable determines whether the technician can be assigned tasks. This option will be discussed in the PM Generation lesson.
Calendar defines the work calendar for a technician. This option will be discussed in the PM Generation lesson.
There are some significant tabs on the Person record that can affect Contracts.
Skills are the certified skills that a technician has. These can be used to assign the person to a scheduled task. This option will be discussed in the PM Generation lesson.
Work Calendar Exception works with the Calendar fields on the Person record and used to determine scheduling tasks. This option will be discussed in the PM Generation lesson.
Teams are used to determine scheduling tasks. This option will be discussed in the PM Generation lesson.
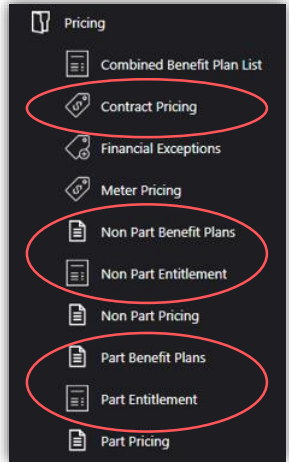
CONTRACT DATA SETUP

The setup for entitlements and benefit plans is found under the Financials, Pricing menu.

Entitlement contracts are used when the customer wants to have products or services **covered for a specific price** with adjustments and exceptions. This includes exceptions for both part and labor coverage.

For example, you can discount all parts by 10 percent. Entitlement rules enable you to apply adjustments to pricing based on contract information. Multiple rules enable you to create complex entitlement structures by specifying adjustments based on coverage rules. You can set up rules to perform multiple adjustments. Pricing adjustments that are assigned are then used during invoicing and billing.

Benefit plan contracts are similar to insurance policies where **you have a deductible.** When you reach the deductible, you will be covered at a certain percentage (including 100%). Or it could be vice versa, you don't pay up to a certain amount (threshold). Once you reach the amount, you must begin to pay. In other words, it is a price adjustment based on usage.

Examples of use:

2 hours of support a month

2 emergency visits a month

$2000 worth of parts free per year

For example, you can waive the labor charge for the first two field service requests and charge full price for the remaining.

Contract pricing set up the rule name and search order on this table. Optionally, you can set up a price template which will default certain pre-set information. For example, you want to price based on Contract type and model.

Contract period pricing is used to set up the parameters for pricing. You can have as many or as few of parameters as you need. Based on the example, you will need to set up parameters for contr_type and model_id. You can also use the Map List ID to map to parameters on other non-financial tables. Financial mapping will be discussed in the *IFS FSM Financials* course.

CONTRACT SETUP

INVOICE RULES

Defines Parameters for Invoicing	
	Day of the month to bill
	Frequency of billing (monthly, quarterly, yearly)
	Specifies period start and end points for billing
	Becomes the bill schedule on the contract

783

New   Delete   Save

		Description	Annual	
Invoice Rule Template ID	783			
Bill Period Type	Annual	Sched Rel Point		Proration Type
Sched Start Day	1	Release Periods		Build Schedules ☑
Sched Start Mth	1	Release Prd Type		Build Meter Schedules ☑
Sched Start Point	Contract Start Date	Release Direction		Backbill ☐
Open Bill Schedules		Bill Release DOM		Use Annual Prd ☐

Invoice rules define the parameters used when invoicing for contracted parts or services such as what day of the month to bill, frequency of billing, at what point of the contract the billing will be calculated (i.e., contract start date, contract end date). You can set up templates which will default the values when you create the contract or you can manually set up invoice rules on each contract. Invoice rule templates are found under the Financials, Admin menu.

When the contract is created, bill schedules are also created. Two bill schedules can be specified: one for billing the contract and associated lines and one for billing meter plans. You can bill contracts and meter plans using different schedules. Using an invoice rule template, you specify the period, start point, and end point for the bill schedule. After the bill schedule is created, you can make any adjustments required. If you set a manual price in the contract header, that price is used to calculate the unadjusted billing price for each period in the bill schedule. The first or last bill period may be a higher price when the manual price cannot be divided evenly.

CONTRACT SETUP
CONTRACT TYPE

| Response times for call-back and arrival on site | Types of services covered | Benefit Plans | Coverage for field service, repair, or both | Evergreen coverage |

BASIC

| | | | | | | New | Delete | Save |

Contract Type	BASIC		Fs Coverage	☑	Active	☑		Cov Day Begin	
Description	BASIC COVERAGE		Rc Coverage	☑	Evergreen	☐		Cov Day End	
Response Code	3 DAY		Locked	☐	VAT Code	S		Day Numbrs Excl	
Coverage Code	M-F: 8 HRS/Day		Corp Offdays Covd	☐	Sequence			Status	A
Part Cov Code	Billable Parts		Posting Group		Type On RNU			Message ID	
Non Part Cov Code	Labor Billable		Contr Line Type					Invoice Rule Template ID	
Part Benefit Plan	ALLOWANCE								

The **Contract type** table defines the terms and conditions that apply to the contract that the customer agreed to (e.g., response time to returning call to customer and arriving on site, days and hours of coverage, what parts and labor covered). Contracts can apply to both service requests and repair requests. The Contract Type table is found under Financials, Admin.

Below are examples of coverage that is set up on the Contract Type table.

Basic Coverage
Monday – Friday/ 8 am – 5 pm
2 hour response time
8 hour arrival time
Parts and labor are billable

Silver Coverage
Monday – Friday/ 8 am – 5 pm
2 hour response time
4 hour arrival time
Parts and labor cover 50%

Gold Coverage
Monday – Friday/ 8 am – 5 pm
30 min response time
1 hour arrival time
Parts and labor covered 100%

CONTRACT CREATION

Contract headers contains information that applies to the entire contract as well as defaults for the contract lines. You can choose to cover individual products, therefore you must have Product records set up for each product to be covered.

You can choose to cover all product of a model, therefore you must have Model records set up for each product to be covered.

You can choose to cover all products at a place, therefore you must have Place records set up and specify the place for each product to be covered. There are many fields on the Contract header. Depending on the type of Contract you are creating, certain fields will need to be populated. In this lesson, we are creating a standard Contract. We will discuss the other fields in later lessons when we create other types of Contracts.

Contract ID is the unique identifier of the Contract. This is system generated and can be changed before the first save.

Upon creation of the Contract, the **Contract Version** value is 1. The field will be incremented upon renewal of the Contract.

Contract Name is an optional field and can be used to describe the Contract.

Upon creation of the Contract, the **Contract Status** default is In Process: Ready. As the Contract moves through its lifecycle, the status will change. Some changes are manual changes. Some changes are performed by the application after certain processes.

Upon creation of the Contract, **Posting Group** defaults from the person logged in. If you specify a place ID to bill, the default posting group of the Contract is then overridden with the posting group of the Place record, if specified. User defined code used to group Contracts for reporting, Contract Renewal, Contract PM Request Generation and/or Bill Generation.

Start Date/End Date identifies the term of coverage for the Contract. It is considered to begin at the start of business on this date and end at the end of business on this date.

Contract Invoice Rule is the invoice rule template.

Place ID Bill To is the place ID to bill. The option "Billing Place" on the place record must be selected.

Place ID Limit To (optional) will limit the products to a specific service location (Product Located At).

Contract Type will define the terms and conditions of the Contract. This information will default to the Contract lines.

Upon selection of the Place ID Bill To, the **Currency** will populate from the place record.

CONTRACT CREATION
CONTRACT LINES

CREATE CONTRACT HEADER → INVOICE RULES TEMPLATE → CREATE CONTRACT LINES

Option 1: SELECT PRODUCT
- Product choice initially restricted to those at the Contract's Billing Place
- Override by unticking 'Place ID Limited To' on Contract Header and 'Located At' on search screen

Option 2: ADD A LINE
- Add 'New' and enter global name, Place ID, Model ID, Serial ID and/or Product ID

The Contract creation process begins with the creation of the header. Invoice rules templates are associated with the header and carried down to the lines. Optionally, you can manually create invoice rules to carry down to the lines. Contract line are created either by selecting the product or manually creating the line.

There are 2 ways to create Contract lines – selecting the product or adding a new line.

If you create the line via "**Select Product**", initially you are restricted to selecting products at the Billing Place on the Contract. If the field "Place ID Limited To" on the header is not populated, you can clear the "Located At" field on the search screen to select any product at any place. If the field "Place ID Limited To" on the header is populated, you are restricted to only products at that place.

If you do not have an invoice rule template on the header, you must select an invoice rule every time you select or add a Contract line.

If you create a line via "**New**", depending on the line type you select, you will be required to enter a global name, place ID, model ID, serial ID and/or product ID. Again, if you do not have an invoice rule template on the header, you must select an invoice rule every time you select or add a Contract line.

The **Detail** tab stores information from the Contract header including defaults from the Contract type. This information can be modified.

These are some of the more significant fields used within Contract line creation:

Contract Type defaults from the header and can be changed.

Invoice Rule selection of the value is either from the Invoice Rule Template or a manually created invoice rule as long as the Invoice Rule exists as a Contract Invoice rule.

Coverage is a general term that applies to the benefits and entitlements you provide to your customer in exchange for a periodic fee. The Coverage Effective Date is used for the initial table-pricing to identify the list price in effect and is then set as the Priced On Date - otherwise "coverage start" and "coverage end " simply define the length of the term.

Coverage Start identifies the start of the coverage for items on this Contract line. It is considered to be the start of business that day and cannot be earlier than the start date specified on the header. This value is used when calculating the bill schedule. Defaults from the header; can be changed, but cannot be before the Coverage Start date.

Coverage End identifies the end of coverage for items on this Contract line. It is considered to be the end of business that day and cannot be later than the end date specified on the header. Defaults from the header; can be changed, but cannot be after the end date of the Contract.

Coverage Effective date affects a few different areas. It is used to drive which effective date to look for in Contract pricing. It can be used to determine when to schedule PMs. It is used in Contract selection to determine if the Contract is active or future. This date cannot be before the Coverage Start date. The value identifies the effective date of coverage for items on this Contract line. It is used in the initial table-pricing of the line to derive the list price. This value is used when determining the application of entitlements. It is not used in bill schedule calculations.

The final step in contract creation is posting the contract. The **Post Contract** button is used to post the contract; after the contract is posted, it no longer appears. It makes the contract active or live, eligible for invoicing and visible in Request and Repair screens.

REVIEW AND POST CONTRACT

New	Delete	Save	Post Contract
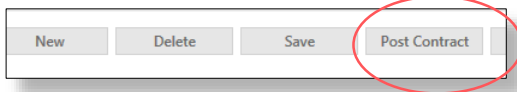
Post Contract Button

- Reviews Contract for system errors
- Makes the Contract active
- Eligible for invoicing

Once you have created the header and the Contract lines, you are ready to review and post the Contract.
Post Contract button is used to review and post the Contract. Posting the Contract make it active and eligible for invoicing.
After the Contract is posted, the button no longer appears on the screen.

CONTRACT CREATION

CONTRACT VISIBILITY

Visible in Request
Visible in Repair screens

M570QA (MKEPDE40) - Contract Selection

Place ID   A100   Model ID   Product ID

Active Contracts

ID	VER	TYPE	START DATE	END DATE	COVG TYPE
103290	1	BASIC PLUS	5/3/2017	5/3/2018	PLACE
103290	1	BASIC PLUS	5/3/2017	5/3/2018	PLACE

After the Contract is posted, it is visible in request and repair screens. Depending on application parameters, expired and future Contracts can also be seen in request and repair screens.

The Contract Selection screen on the Request screen uses the following application parameters to display Contracts:

Contract_types_to_exclude identifies Contract types for which corresponding Contracts do not appear in the Contract Selection screen. Values are defined on the Contract Type screen.

Display_expired_contracts determines whether expired, posted Contracts appear on the Contract Selection screen.

Display_future_contracts determines whether future, posted Contracts appear on the Contract Selection screen.

Display_active_contracts determines whether active, posted Contracts appear on the Contract Selection screen.

WRAP-UP

This is the agenda for the week's course.
This morning is highlighted in the green box

CONTRACT MANAGEMENT
LEARNING OUTCOMES

By the end of this lesson, you should :
- Understand how to modify contracts
- Understand how to copy contracts
- Understand how to cancel contracts
- Understand how to renew contracts

CONTRACT MANAGEMENT

CONTRACT MANAGEMENT

CONTRACT MANAGEMENT

Modifications

Copied
Contracts

Renewed
Contracts

Cancelled
Contracts

Once a contract has been posted and live, the customer inevitably will want changes. They may want to add or remove product and services on the contract. They may want to have a similar contract drawn up for another division. They may want to renew their contract for another term. Or, they may want to simply cancel their existing contract. All these situations can be handled within the Contracts module.

A **modification** to the contract would include adding contract lines, cancelling contract lines, changing coverage dates, changing bill schedules or changing the contract type. Any time a change has occurred, the "Changes Pending" option is automatically selected giving you a visual indicator that changes are in progress. Once you have posted the contract to make the changes active, the option will not be selected.

Changes to Contracts that are not posted are indicated by the "Changes Pending" option. A Contract will not create vouchers/Invoices for this Contract if this box is checked. When you post the Contract with your changes, this option is cleared. When you change the Contract type, coverage start date, or coverage end date on the Contract header, any lines with corresponding values are also changed. Changes are processed asynchronously and appear in the Run Log. If you want to put a Contract on hold, you can set the Contract status to On Hold: Inactive. Benefits and entitlements still apply, but invoices are not created and no billing occurs. Any of these changes can affect Contract pricing and we recommend you set up repricing rules to reprice the Contract after changes are saved. You must post the Contract.

Business rules affecting changes to Contracts:

Contract Repricing determines whether Contracts are repriced. Rules are evaluated when updating a Contract line and evaluation stops after the first match

CONTRACT MANAGEMENT
COPY CONTRACT PROCESS FLOW

Original Contract
- Expired Contract
- Active Contract
- Pending Contract

Contract Copy function
- Can create new Contract ID
- Can have system generate new Contract ID

New Contract
- Copy of original Contract
- New Contract ID and Version
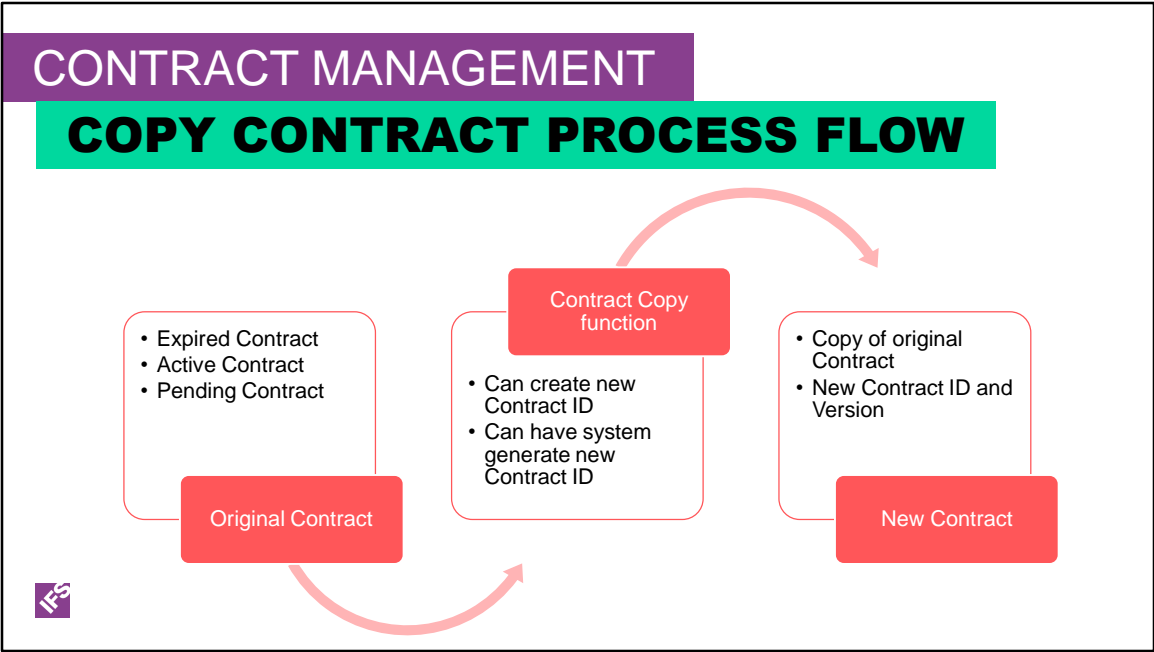
Copying a contract is found under Contracts Manager, Contract Copy.
Sometimes there is a need to have a Contract copied from either an active, pending or expired Contract. This process does not RENEW the Contract. It simply makes a copy of the existing Contract with a new Contract ID and version. You have the choice to reprice it, rebuild the bill schedules and pm schedules, and even include expired or canceled lines.

CONTRACT MANAGEMENT

CANCELLING ENTIRE CONTRACT AND CONTRACT LINES

Process to Cancel Entire Contract
- Enter Canceled On Date
- Change Contract Status = Cancel
- Post Contract

Process to Cancel Individual Line
- Enter Canceled On Date
- Change Line Status = Cancel
- Post Contract
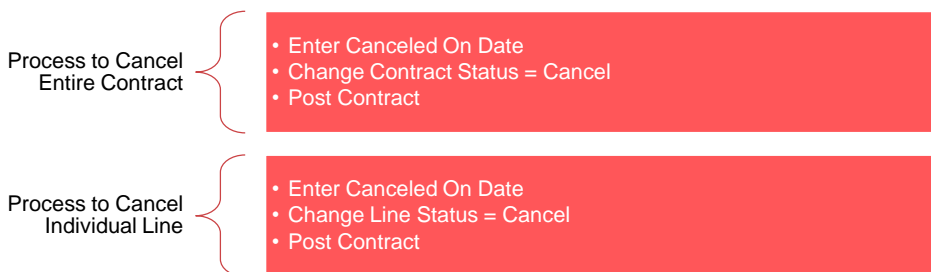
30

The recommended way to cancel an **individual Contract line** is to enter Canceled On Date, then select Line Status = Cancel. Post Contract

The recommended way to cancel a **Contract header** (thus filtering to the lines) is to

1. Enter Canceled On Date on Contract header
2. Change Contract status = Cancel
3. Post Contract

Note, if you leave the "Canceled On Date" null, the Contract cancels fully. The cancellation will then be based on the coverage dates rather than the canceled on date.

The bill schedules are automatically adjusted. If you have "Backbill" set on the Invoicing Rule, you will automatically get credits. Also, if you were to reverse the cancellation of the Contract, the bill schedules are automatically adjusted.

The other way is to change the end dates of the Contracts. It is much more difficult to reverse the cancellation as you will need to adjust the Contract header and line dates.

Except for several application parameters, there is no difference in **canceling PM Contracts.**

There are application parameters to apply to situations where a request PM generated is canceled.

Cancel_pm_schedule_instead_of_delete is set to Y (yes) if you want the preventative maintenance schedule set to canceled status instead of deleted when the coverage length is changed.

Cancel_pm_set_request_to is the status to set on a preventative maintenance request when it is automatically canceled because the value of cancel_pm_schedule_instead_of_delete is Y (yes). Values are defined on the req_status code table.

Cancel_task_pm_status is the status to assign to a related preventative maintenance schedule when a task is canceled. Values are CANCEL, COMPLETE, and blank (null). When the value is blank (null), the preventative maintenance schedule entry status is set to Ready.
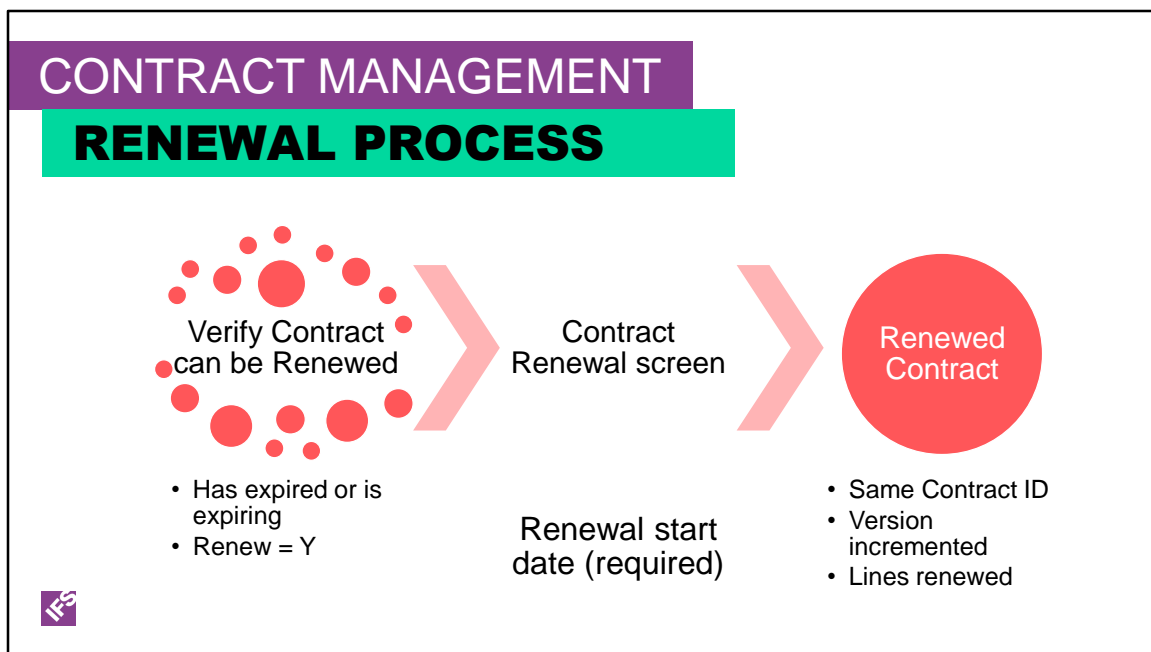
CONTRACT MANAGEMENT
RENEWAL PROCESS

Verify Contract can be Renewed

Contract Renewal screen

Renewed Contract

- Has expired or is expiring
- Renew = Y

Renewal start date (required)

- Same Contract ID
- Version incremented
- Lines renewed

Once a contract reaches its end date, it expires. To avoid expiration, the contract must go through a renewal process prior to the end date. When you **renew** a contract, you create a new contract with the same contract ID and an incremented version number. Information on the Details tab of the Contract screen control all other aspects of contract renewal.

The process for renewal is found under the Financials, Contract Manager menu.

1. Verify the Contract can be renewed. The Renew option = Y on the Contract line and Contract header and the Contract has or is about to expire.
2. Go to Financials, Contract Manager, Contract Renewal. **Renewal Start Date** is required. The other fields are optional. The Contract will be picked up if the date is on or after the **Up for Renewal On** field on the Contract header.
3. The Contract is created with same Contract ID and an incremented Contract version.
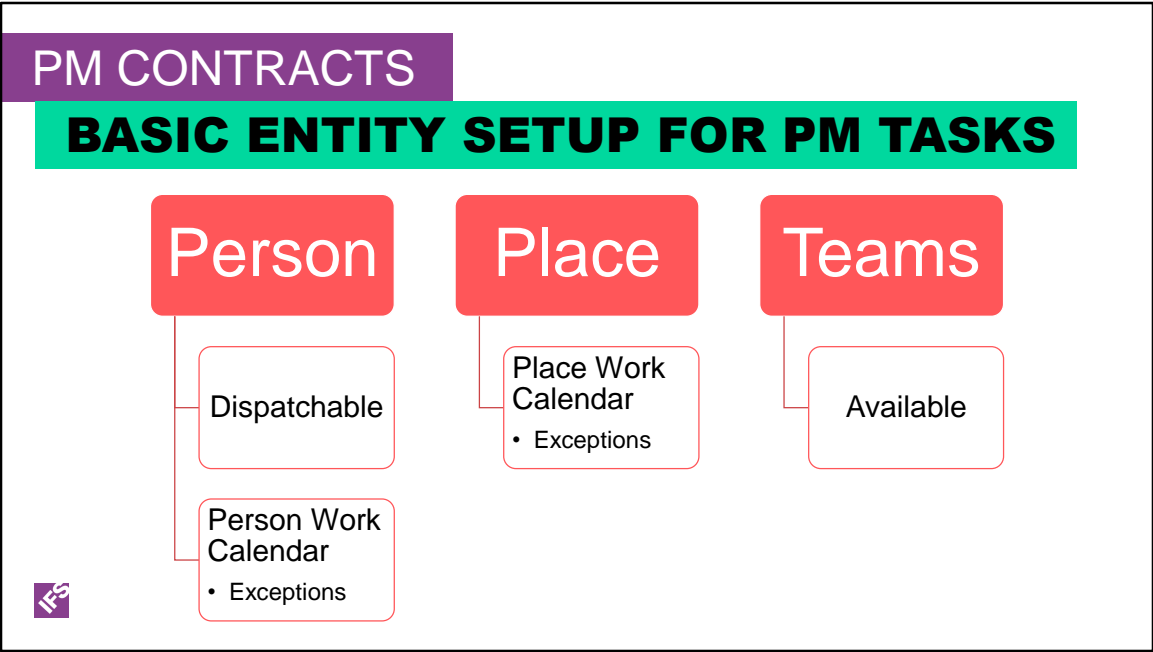
PM CONTRACTS

PM CONTRACTS
LEARNING OUTCOMES

By the end of this lesson, you should:
- Be able to define Preventative Maintenance
- Know how to create simple PM Contracts

Preventative maintenance is the creation of a schedule on a contract to perform tasks, and the creation of requests and tasks to track completion of the maintenance. Preventative maintenance is created based on a contract. Schedules are created based on rules you set up. You determine the interval between schedules, whether they occur based on interval, meter readings, or time since last completion. Canceling or closing a task also counts as completion. You also specify request and task templates to be used when creating the requests and tasks. If a contract ends and preventative maintenance is not allowed out of coverage, new preventative maintenance schedules based on task completion are not created. If a newer version of the contract exists, for example it has been renewed, the next preventative maintenance schedule's date is adjusted based on the task completion date. Requests are created for products that requires preventative maintenance. Based on the type of contract coverage and application parameters, tasks can be created for each product. Requests can be consolidated based on criteria you specify during generation of requests and tasks, known as autogen.
Requests are created for products that requires preventative maintenance. Based on the type of Contract coverage and application parameters, tasks can be created for each product. Requests can be consolidated based on criteria you specify during generation of requests and tasks, known as autogen.
Request Templates are used to define certain fields on the request when the PMs are generated. This is an optional table.
Task Templates are used to define certain fields on the task when the PMs are generated. This is an optional table.
Both request and task templates can be applied on the Contract PM schedule or they can be applied when the requests and tasks are automatically generated. Request and Task templates are discussed in detail in the *IFS FSM Services* course.
Person, Place and Teams have fields that should be setup for tasks to be created and assigned.
Dispatchable option on the person determines whether the person can be assigned tasks.
Calendar defines the work calendar for a person. If there are exceptions, those will also be taken into consideration upon assigning the task. The calendar and exceptions on the place record is also taken into consideration when determining assignment.
Available indicates whether the team is available. If the team is not available, the team will not be considered for assignment.

PM CONTRACTS

TYPES OF PM SCHEDULES

Built on a recurring basis, based on length of coverage term

Based on task completion

Based on meter readings

Based on length of time or meter usage

You can create four types of preventative maintenance schedules:
A preventative maintenance schedule built on a recurring basis based on the length of the coverage term is the standard FSM preventative maintenance schedule. The following three options are other types that you can create.
When you create a preventative maintenance schedule based on task completion, the first preventative maintenance request is created when the bill schedule is generated. When the task in the preventative maintenance request is completed, the next preventative maintenance request is automatically created.
When you create a preventative maintenance schedule based on meter readings, a preventative maintenance request is created when the meter reading exceeds the threshold you specify. When a meter reading that counts as usage is entered and it exceeds the specified threshold, a preventative maintenance request is automatically created.
When you create a preventative maintenance schedule based on length of time or meter usage, a preventative maintenance request is created when the length of time is met or the meter threshold is met, whichever comes first. When either the time period is reached or a meter reading exceeds the threshold, a preventative maintenance request is automatically created.
Meter Contracts will be discussed in another course – *IFS FSM Special Courses.*

PM CONTRACTS

EXAMPLE – MONTHLY PMS

PM_Schedule_Planned Work Date

Contract Dates

- Start Date: 1/1/20
- End Date: 12/31/20

PM Schedule Rule

- PM_Schedule_Rule: MONTHLY
- PM_Schedule_Period_Type: MONTHLY
- PM_Schedule_Start_Point: START (build from Contract Start Date)
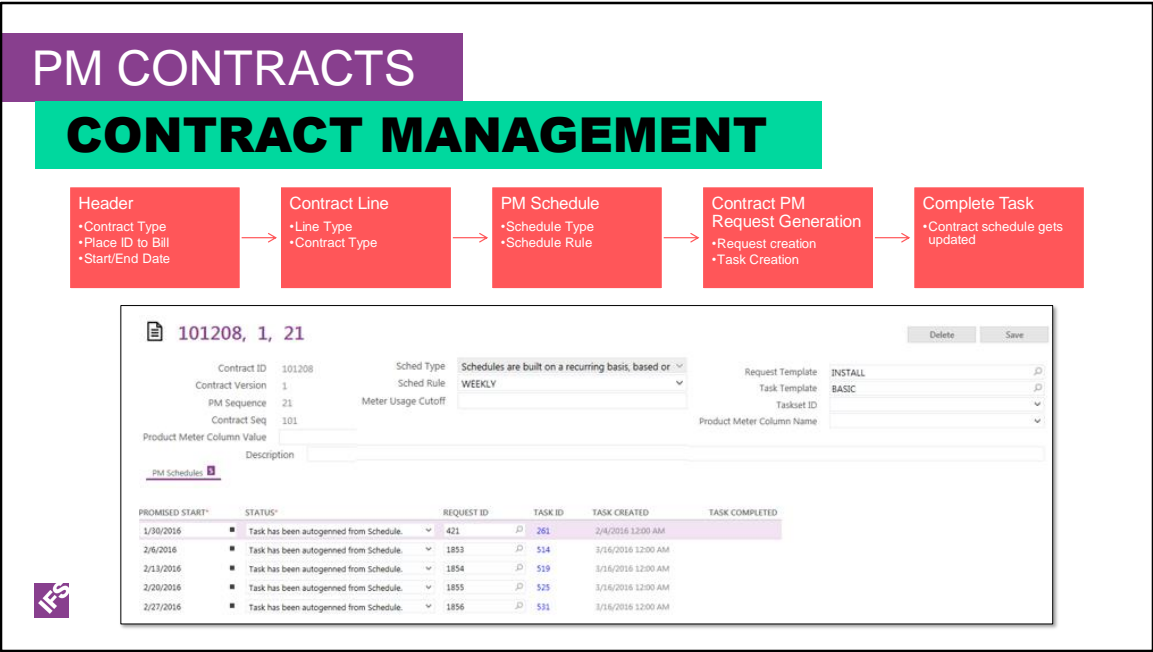
PM Schedule_Period_Type

- PM_Schedule_Period_Type: MONTHLY
- PM_Schedule_Start_Point: START
- Period_type: MO
- Period_factor: 1

PROMISED START*	STATUS*
1/1/2020	Schedule is ready to be Autogenned.
2/1/2020	Schedule is ready to be Autogenned.
3/1/2020	Schedule is ready to be Autogenned.
4/1/2020	Schedule is ready to be Autogenned.
5/1/2020	Schedule is ready to be Autogenned.
6/1/2020	Schedule is ready to be Autogenned.
7/1/2020	Schedule is ready to be Autogenned.
8/1/2020	Schedule is ready to be Autogenned.
9/1/2020	Schedule is ready to be Autogenned.
10/1/2020	Schedule is ready to be Autogenned.
11/1/2020	Schedule is ready to be Autogenned.
12/1/2020	Schedule is ready to be Autogenned.

Now that you understand the individual tables required for the setup of the PM schedules. Let's look at several examples of PMs. In this example, the Contract is a year in length. It's PM Schedule Period Type indicates its period length is 1 month(period_type * period_factor). It will build its periods from the start date of the Contract header.
PM_Schedule_Planned Work Date will be as seen in the screenshot.

Once a contract has been posted and live, the customer inevitably will want changes. They may want to add or remove product and services on the contract. They may want to have a similar contract drawn up for another division. They may want to renew their contract for another term. Or, they may want to simply cancel their existing contract. All these situations can be handled within the Contracts module.

A **modification** to the contract would include adding contract lines, cancelling contract lines, changing coverage dates, changing bill schedules or changing the contract type. Any time a change has occurred, the "Changes Pending" option is automatically selected giving you a visual indicator that changes are in progress. Once you have posted the contract to make the changes active, the option will not be selected.

Sometimes there is a need to have a contract **copied** from either an active or expired contract. This process does not RENEW the contract. It simply makes a copy of the existing contract. You have the choice to reprice it, rebuild the bill schedules and pm schedules, and even include expired or cancelled lines.

Once a contract reaches its end date, it expires. To avoid expiration, the contract must go through a renewal process prior to the end date. When you **renew** a contract, you create a new contract with the same contract ID and an incremented version number. Information on the Details tab of the Contract screen control all other aspects of contract renewal.

While a contract is active, the customer may no longer want a particular product on a contract or perhaps does not want a contract at all. In either case, the line or the contract can be **cancelled**. Any charges that have not been invoiced may be prorated.

There are several ways to cancel a contract:

Change contract or line status = Cancel

Change end date on contract header or the line

Contract PM Request Generation, under Contracts Manager, is used to generate preventative maintenance requests and tasks based on the information in preventative maintenance schedule entries. This reduces your need to manually open requests to meet your Contracted obligations. On a regular basis, for example weekly or monthly, generate preventative maintenance requests and tasks.

Schedule End Date looks at tasks scheduled on or before the date selected. This is a required field.

All the rest of the fields on the Contract PM Request Generation screen are optional filtering criteria. For example, you can filter your criteria based on **Contract ID/Version** or by **posting group**.

By default, one request with one or more tasks are created for each schedule record. You can choose to consolidate to as few requests as possible. Selecting the **Consolidate Request** option consolidates based on place.

When **Bundle PMs** is set, one task is created for all preventative maintenance tasks on the same day using the same task template. This way you consolidate PM requests that are scheduled within a specified number of days thus reducing the number of service calls required.

Variance Days is used to specify the number of days variance that causes the requests to be consolidated as long as the planned work dates for the PM requests fall within the specified number of days.

This is one of the more significant business rules used within PM Schedule creation.

Create Contract Preventative Maintenance for Contract Line is used to automatically create preventative maintenance schedules when creating Contract lines.

These are some of the more significant application parameters used within PM Contract creation.

Apply_expired_contract_at_autogen is set to Y (yes) if you want to consider preventative maintenance schedules on expired Contracts when creating preventative maintenance requests.

Default_role_type_for_autogen_request_contacts is set to the role type used to assign the place contact to requests during preventative maintenance request generation. Values are defined on the role_type code table.

Apply_future_contract_at_autogen is set to Y (yes) if you want to consider preventative maintenance schedules on future Contracts when creating preventative maintenance requests.

Task completion is discussed in *IFS FSM Services* course. Once the technician services the product on the Contract, he will complete the task by updating the task status to "Complete". If the business rules are set up to automatically complete the request, the request gets completed. This in turn will update the Contract PM

Schedule with the completed date of the task.

Use the contract that copied in the previous demo
Add a PM schedule
Go to Contract PM Request Generation to create the requests from the contract
Show the request and task created. Show the request and task on the PM schedule
Complete the task. Show the update to the PM schedule

WRAP-UP