



Tutorial - Questions for Contracts

Exercise 1: Response Code setup

1. Go to Financials > Admin > response code
2. Enter New
3. Set response code as 2 DAY (we are going to create a 2 day response code)
4. Response type 'accept task'
5. Add a description (E.g. Arrival within 2 days)
6. Put commit interval 2 and commit units as days
7. Specify a rank (e.g. 2)
8. Set up a calendar ID (E.g. STD)
9. Tick customer calendar
10. Select fulfill event as 'Accepted'
11. Hit save

Exercise 2: Contract Type

1. Go to Financials > Admin > contract type
2. Enter New
3. Add contract type name (E.g. Poly Contract) and a description (POLY TEST)
4. Select the above created response code
5. Select coverage code 'Every Day, All Day'
6. Tick FS coverage and RC coverage. And tick Active > save

Exercise 3: Contract Pricing

Step 1: Contract Pricing

1. Go to Financials > Pricing > Contract Pricing
2. This will take you to the CONTRACT PERIOD PRICING
3. Press the New Button
4. A Rule ID will be automatically Generated (This is a Hyperlink to get to the next screen)
5. Enter a Search Order for this Rule
6. Enter a Description for this rule (Contract Price By Contract Type)
7. Save
8. Go to the Rule ID Hyperlink

Step 2: Contract pricing parameter

1. Add a new line
2. Enter COL VALUE REF as 1 and COLUMN NAME as CONTR_TYPE
3. Put parameter constraint as Equal To
4. Mark the check box 'EXACT MATCH' and save
5. Add another line and enter COL VALUE REF as 2. Set COLUMN NAME as CREATED_BY
6. Put parameter constraint as Equal To and mark the check box 'EXACT MATCH' and save
7. Hit one of sequence hyperlink. This will navigate you to contract pricing conditions



8. Add a new line and value 1 as 'POLY TEST'. Value 2 as your 'USER_ID' and save
9. Hit on sequence ID again
10. This will navigate you to contract price lists screen
11. Add a new line and fill mandatory data. Select currency as U.S.Dollar, Select effective code as Current, Set effective date, Period type monthly or quarterly, Price type 'List Price'. Add a prize to List Price and set to Active

Exercise 4: Invoice Rule Template setup

1. Go to Financial > Admin > Invoice Rule Template
2. Enter New
3. Select a Bill Period Type (Financial > Admin > Contract code table > Bill period type, how often you need to bill)
4. Chose Monthly > Save
5. Add description (standard monthly)
6. Select Schedule Start Point as 'contract start date'
7. Select Schedule Rel Point as 'start date'
8. Tick Build Schedules and hit save

Exercise 5: Create Contract

1. Go to Financials > Contracts
2. Enter New and add a contract name
3. Set a start date and end date
4. Enter place id bill to (your customer place)
5. Select above created type as the contract type
6. Select above created invoice rule template as contract invoice rule
7. Go to Lines tab and add a new line
8. Select line type as Place Coverage and enter a place id (your customer place)
9. Hit Save
10. Approve and Post the contract

After completing the above, go through the following business scenarios.

Exercise 6: Contract Billing

1. Go to the lines tab and hit on line sequence. Note the billing schedule which had got generated as specified in your invoice rule
2. Go to Financials > Billing > billing generation
3. Enter the contract ID > tick 'Include Contract' > tick Extract To Vouchers > select a billing date
4. Note the voucher gets created
5. Delete the voucher
6. Go to the contract line > bill schedules and note the option 'Post To Invoice'
7. Hit post to invoice and check if you get the invoice created



App Params

Check the values for the following App params.

CONTRACT_TYPES_TO_EXCLUDE, DISPLAY_ACTIVE_CONTRACTS, DISPLAY_EXPIRED_CONTRACTS,
DISPLAY_PLACE_CONTRACT_SELECTION

Exercise 7

Imagine you would want to create a contract for a customer which has model coverage. Create the necessary contract pricing and proceed to create the contract.

Exercise 8

Imagine you would want to create a contract for a place coverage for one of your customers and to bill this month's schedule. Proceed to create the contract and do the billing for the contract.

Exercise 9:

Create a contract to be fetched for a request that you create for a particular part and place you have.

Contracts Manager

Exercise 10:

1. Go to contract screen > create a contract that ends today> post contract
2. Go to Contracts Manager screen and select 'Contract Copy' option
3. Specify the Contract ID From and Contract Version From according to above created contract
4. Hit on Generate Contract ID > system will create an id
5. Hit Begin > details are copied to new contract
6. Check if a new contract got created by copying details from earlier created contract

Exercise 11:

1. Create a contract > select a contract type where you have specified renewal type as well (contract type screen > Type on RNU field)
2. Set Ends date as today> post contract
3. Go to Contracts Manager screen and select 'Contract renewal' option
4. Specify the contract ID
5. Set Renewal Start Date as tomorrow
6. Hit begin
7. Check if a new version got created for your contract with the contract type you have specified above