

Benefits plans

Exercise 1

Step 1: Create Benefit Plan Type

1. Go to Financials > Admin > contract code tables > benefit plan type
2. Add new > Specify plan type > add description
3. Add plan source as 'non-part usage – usage based'
4. Add plan type as 'allowance plan, based on quantity'
5. Hit save

Step 2: Create non-part benefit Plan

1. Go to non-part benefit plans > Add new
2. Go inside the rule ID. You will be navigated to the non-part benefit plan parameters.
3. Add col value ref.
4. Add column name as LINE_CODE
5. Go to sequence. You will be navigated to non-part benefit plan conditions.
6. Add new
7. Select benefit plan type as 'Labor HRs Plan'
8. Specify value as 'LB'.
9. Go in to the sequence.
10. Hit new
11. Add plan type as 'non-part quantity allowance' > currency as 'US dollars' > Effective code as 'CURRENT' > set a quantity value (E.g. 10).

Step 3: Link the Non-part Benefit plan to a contract type

1. Create a contract type > add necessary values (please refer contract exercise)
2. Select the above created non-part benefit plan.
3. Hit save.

Step 4: Create the request (test the benefit plan)

1. Create a request to add the above contract
2. Add details > save
3. Add non part usage line (labor) > add quantity less than 10.
4. Save
5. Note the price comes as zero.



Exercise 2

Add your own Benefit plan type for plan source 'non part usage – usage based' and plan type 'allowance plan based on amount' for non-part benefit plan. Create a non-plan benefit plan using this type to trigger for the following values.

LINE_CODE = LB, CREATED_BY = your user ID, PLACE_ID_TO_BILL = your place ID.

Specify benefit amount = 100\$

Link the above to a contract and create a request to link the contract. Create non-part usage in request for 100 amount and see if above gets fetched.

Exercise 3:

Add your own Benefit plan type for plan source 'non part usage – usage based' and plan type 'capped plan-based amount' for non-part benefit plan. Create a non-plan benefit plan using this type to trigger for the following values.

PLACE_ID_TO_BILL = your place ID.

Specify benefit amount = 100\$

Link the above to a contract and create a request to link the contract. Create non-part usage in request for 100 amount and see if above gets fetched.

Exercise 4

Add your own Benefit plan type for plan source 'non part usage – usage based' and plan type 'capped plan-based quantity' for non-part benefit plan. Create a non-plan benefit plan using this type to trigger for the following values.

LINE_CODE = LB, CREATED_BY = your user ID, PLACE_ID_TO_BILL = your place ID.

Specify benefit quantity = 10

Link the above to a contract and create a request to link the contract. Create non-part usage in request for quantity 10 and see if above gets fetched.

Exercise 5:

Add your own Benefit plan type for plan source 'part usage/part needs – usage based' and plan type 'allowance plan based on amount' for part benefit plan. Create a part benefit plan using this type to trigger for the following values.

PART_ID = your part, CREATED_BY = your user ID, PLACE_ID_TO_BILL = your place ID.

Specify benefit amount = 100\$



Link the above to a contract and create a request to link the contract. Create part usage in request for 100 amount and see if above gets fetched.

Exercise 6:

Add your own Benefit plan type for plan source 'part usage/part needs – usage based' and plan type 'allowance plan based on quantity' for part benefit plan. Create a part benefit plan using this type to trigger for the following values.

PART_ID = your part, CREATED_BY = your user ID, PLACE_ID_TO_BILL = your place ID.

Specify benefit quantity = 10

Link the above to a contract and create a request to link the contract. Create part usage in request for 10 amount and see if above gets fetched

Exercise 7:

Add your own Benefit plan type for plan source 'part usage/part needs – usage based' and plan type 'cap planned based on amount' for part benefit plan. Create a part benefit plan using this type to trigger for the following values.

PART_ID = your part, CREATED_BY = your user ID, PLACE_ID_TO_BILL = your place ID.

Specify benefit amount = 100\$

Link the above to a contract and create a request to link the contract. Create part usage in request for 100\$ amount and see if above gets fetched.

Exercise 8:

A customer wants to have three different types of contracts as mentioned below. Create contracts for each. Create contracts to reflect the following types.

Contract one: Basic Benefit Coverage

- Monday – Friday/ 8 am – 5 pm
- 2 hour response time
- Parts and labor are billable
- Silver benefit Coverage
 - Monday – Friday/ 8 am – 5 pm
 - 2 hour response time
 - labor cover up to 100 amounts
- Gold Coverage



- Monday – Friday/ 8 am – 5 pm
- 30 min response time
- Parts covered after 5 quantities.

Exercise 9:

In this scenario, your customer has a quarterly entitlement contract for several places on the contract. All places with a global name of “POLY” will cover up to 200\$ on parts. Likewise, all places with a global name of “METRIX” receiving cap quantity benefit up to 10 quantities. Create a benefit to cover the above and add the coverage to a contract. Create relevant requests to see if your changes had taken place.