Entitlements

Exercise 1: Creating coverage codes
1. Go to Admins > Code> Global Codes > NPCOV_CODE
2. Add coverage code named 'test'
3. Refresh cache

Exercise 2: Cerate non part usage entitlement
1. Go to financials > pricing > non part entitlement
2. Create new > put a search order
3. Specify a rule name
4. Go in to the rule id through the hyperlink. You will be navigated to the non part entitlement parameter.
5. Create new
6. Specify a column value
7. Keep the table name blank > add column name as 'place_id_to_bill' (we are going to make this triggered for place id)
8. Go in to the sequence > add new
9. Check if the above created coverage code is visible on drop down > select the created coverage code
10. Add a place_id_to_bill value in value 1.
11. Go in to the sequence
12. Click new
13. Specify a currency (E.g. US Dollar)
14. Specify effective code as 'CURRENT' > effective date as today
15. Add adjustment percentage as -100 > refresh cache

Exercise 3: Create a contract to trigger above
1. Create a contract with above specified bill to place and relevant lines
2. Go to details tab > specify non part coverage code as the one you created above.
3. Post the contract
4. Create a request to include the contract you created.
5. Under parts and labor > add labor value
6. Go in to the non part usage line > check if there is a contract coverage adjustment included.

Exercise 3:

Add a non part usage entitlement to be triggered for the following parameters. Add desired amount as your discount. You may edit the already existing contract to include your coverage code.

Created by = your user

Place_id = your customer place

Exercise 4:

Create a non-part entitlement to be triggered. You may edit the already existing contract to include your coverage code.

Exercise 5:

Create a part entitlement to be triggered for the following. You may edit the already existing contract to include your coverage code.

Part_id = your desired part

Place_id_Bill_to = your customer bill to place.

Exercise 6:

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 Coverage

- Monday – Friday/ 8 am – 5 pm

- 2 hour response time

- Parts and labor are billable

- Silver Coverage

  - Monday – Friday/ 8 am – 5 pm

  - 2 hour response time

  - Parts and labor cover 50%

- Gold Coverage

- Monday – Friday/ 8 am – 5 pm

- 30 min response time

- Parts and labor covered 100%

Exercise 7: Entitlements

In this scenario, your customer has a quarterly entitlement contract for several places on the contract. All places with a global name of "Aero" will have a 20% discount on parts. Likewise, all places with a global name of "FSM" receiving a 50% discount and all labor 100% discount. Create an entitlement to cover the above and add the coverage to a contract. Create relevant requests to see if your changes had taken place.