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| STEP 1: Use Chrome to log in to *PI Contracts* with your Windows Credentials    Use your **Chrome Web Browser** to log into *PI Contracts*:  [**http://picer-prd-app01/PIContracts/**](http://picer-prd-app01/PIContracts/)    Log into *PI Contracts* using your **Windows Login Credentials**.    STEP 2: Initiate a Contract Renewal, Modification, Upsell or New Contract by clicking the *Add new record* button |
| From the Home Page, click on the *Add new record* button to initiate a new Client Log.  STEP 3: Enter the Required Contract Information |
| Select the Contract Type.  Select the Relationship name from the drop down, or begin typing the Relationship name for a refined list.  The Contracts associated with the Relationship will be populated in the *Contract* dropdown box, and auto-selected. The selection can be modified.    Enter the *Effective Date*, or select the date from the calendar icon. The *Expiry Date* will populated. The pre-populated date can be modified.  STEP 4: Route the Client Log for Pricing |
| Select the person to whom the Client Log should be routed to for pricing. Upon change, the Send Email checkbox will selected. An email alert will be sent.  STEP 5: Enter Pricing Information |
| Click on the Pencil Icon for to edit the Client Log for pricing.    The *Get Revenue* button will populate the revenue values for the selected contract numbers. These values can be modified.  The date range of the Revenue values is noted on the screen. This is the most recent data from the Margin Trend. |
| Enter the percentage increase values. The increase values will be calculated.  The calculated values can be modified.    Use the *Add Other* button if there are any additional revenue increases to be entered.    Check *Share of Wallet Gains* or *Impact Rate of Change* when you need to enter data for these increases.  STEP 6: Enter Accessorial Information |
| Click the *Accessorials* tab to enter accessorial data for the contract.    The *Get Accessorials* button will populate the accessorial values for the selected contract numbers. These values can be modified.  The date range of the Accessorial values is noted on the screen. This is the most recent data imported from SAP.  STEP 7: Enter Notes    Click the *Notes/Approvals* tab to view or enter notes.    Enter the note in the free form text box and select the type of note, either an *approval* or an *internal* note.  STEP 8: Route the Client Log back to Contracts |
| Select the person to whom the Client Log should be routed back to in contracts. Upon change, the Send Email checkbox will selected. An email alert will be sent.  STEP 9: Save As PDF and Route via DocuSign    To View or Print a formatted version of the Client Log, click on the *Relationship Name* blue hyperlink.    Click the *Print* button on the bottom of the pop-up page.    Select *Save as PDF* as the destination and click *Save*. This will produce a PDF which can go through the docuSign process of approvals. |
| For help, contact [app.support@purolatorintl.com](mailto:app.support@purolatorintl.com) |