ORACLE NETSUITE

Software Vertical Contract Renewals

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Contract Renewals Overview

Software Vertical Contract Renewals SuiteApp gives your software company unprecedented ease in managing contract renewals of your install base.

This SuiteApp is designed for software companies who offer perpetually-licensed and term-licensed products, enabling you to effectively manage the recurring billing of both on-premise and on-demand software licenses and entitlements.

This SuiteApp offers:

- A flexible and powerful automated renewal process that lets you track renewable assets and maximize renewal revenue
- Seamless tracking of upsell and returns
- Complete visibility into your install base
- Multi-tier channel sales management

The Software Vertical Contract Renewals SuiteApp enables you to manage your renewable products and services as well as non-renewable items like training and consulting. In addition, maintenance and support fees can be applied and included in the renewal contract.

A flexible, automated renewal process generates a transaction at the end of a contract term that is, in turn, used to generate the renewal contract. This new contract includes items that you have set as renewable, such as products and module licenses, user licenses (or seats), and support and maintenance entitlements. One-time, non-renewable items like training and consulting are not typically renewed.

Availability

Software Vertical Contract Renewals is provided as a SuiteApp developed by NetSuite. For information about this SuiteApp, contact your NetSuite account representative.

Read the following topics for more information about the features offered by this SuiteApp:

- Contracts and Renewals
- Upsell and Returns
- Support for Multiple Sales Channels
- Discounts

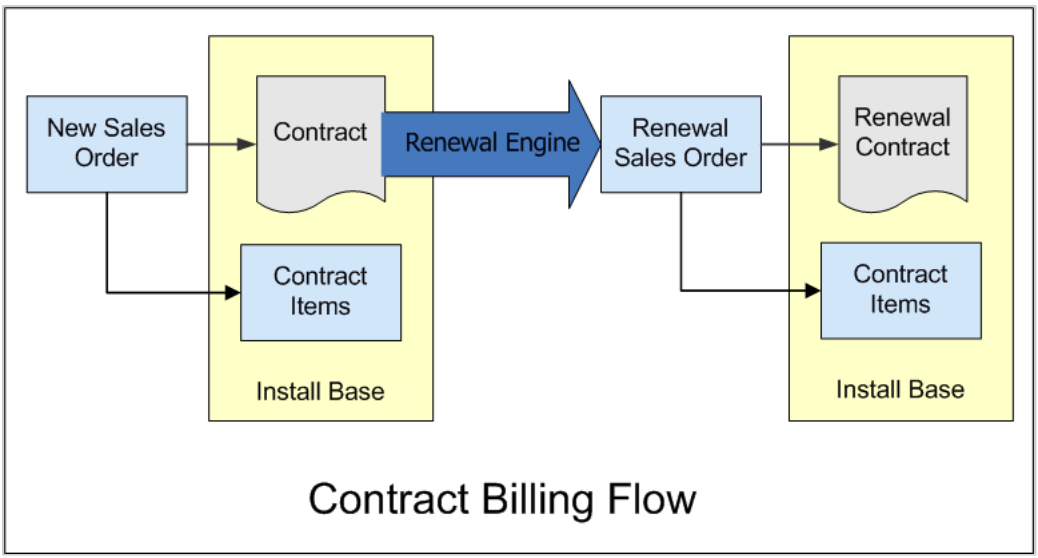
Contracts and Renewals

With Contract Renewals, when you create an initial sales order for a customer, the information from that order is used to generate a contract. The overall start and end dates of the sales order define the contract term, and items on the sales order generate contract items on the resulting contract.

The contract and contract items make up the install base of the customer. Contracts are listed on the Contracts subtab on customer records. You can also click the contract ID link on the original sales order to view a specific contract.

Prior to the end of the contract term, a renewal transaction is generated based on your setting for the Transaction Type to Create preference at Contract Renewals > Setup > Contract Renewals Preferences. When saved and billed, this order generates a new contract that includes the items from the customer's install base that are configured as renewable.

If you are using the channel management fields on customer records to track indirect sales relationships (including resellers and distributors), a single renewal transaction is generated for each combination of End User and Bill To Customer.



For more information about creating contracts, see Creating a New Contract. For information about renewals, see Contract Renewals Process.

Upsell and Returns

During the term of a contract, you can make changes by entering sales orders for additional items (upsell) or by issuing returns (downsell).

When you want to add items to an existing contract, you create another sales order for the customer and attach it to the existing contract. You can also create a new order from the contract by selecting the contract items for upsell and clicking the Create Upsell Order button.

Items added to a contract must have start and end dates within the contract term. To add items that extend beyond the existing contract's start and end dates, you need to create a separate contract. For more information, see Contract Upsell.

If the customer reduces their service during the contract term, you create a return authorization tied to the contract. These items are then offset from the contract and are not renewed. For more information, see Contracts and Returns.

Support for Multiple Sales Channels

The Software Vertical Contract Renewals SuiteApp enables you to track and manage multi-tiered sales interactions with distributors, resellers, and end users.

The Channel Tier field on the customer record defines the relationship each customer has with your company. You can choose one of the following:

- **End User** - The end user is the customer who uses or registers the product. The end user may purchase the product from you or from a reseller or a distributor.
- **Reseller** - The reseller purchases the product from you and resells it to an end user. The product can be delivered from you either through the reseller or directly to the end user.
- **Distributor** - Distributors purchase from your company and sell the product to a reseller or end user. The distributor delivers the product and bills the purchaser.

Important: Every end user of your products needs a customer record in your NetSuite account even if they purchase through a distributor or a reseller.

With Contract Renewals, these channels are managed through two fields on sales transactions: End User and Bill To Customer.

On the Channel subtab of the transaction form, do the following:

- If you are creating a contract for an end user who purchased through a reseller, on the Channel subtab of the transaction form, select the reseller or distributor for the transaction, and select Reseller in the Bill To Tier field.
- If the contract is for an end user who purchased through a distributor, select Distributor in the Bill To Tier field.
- Select the end user in the End User field.

Note: For transactions submitted through SOAP web services, the SuiteApp throws an error if the Bill To Customer value is not the same as either the End User, Reseller, or Distributor specified on the web service request. If a Distributor is specified on the request, the Bill To Tier field on the transaction is set to Distributor. If a Reseller is provided on the request instead of a Distributor, the Bill To Tier field on the transaction is set to Reseller. If neither Distributor nor Reseller is provided on the request, the Bill To Tier field on the transaction is set to End User.

If you have partners who sell your products, you can track them with partner records in your NetSuite account. You can associate partners with customers and with sales transactions. For more information, see the help topic Associating Partners With Customers and Transactions.

A variety of channel-based reports are available on the Contract Renewals tab.

Discounts

There are three types of discounts available in the Software Vertical Contract Renewals SuiteApp:

- Transaction body discounts affect all transaction lines and cannot be renewed.
- Transaction line discounts affect the line above the discount in a transaction and also cannot be renewed.
- In-line discounts affect an individual transaction line and are stored in the corresponding contract item. These discounts can be renewed.

Note: When a contract is renewed, if there is a customer discount set on the customer record, this customer discount is applied to the renewal contract items in place of any in-line discounts set on the original contract.

Setting Up Contract Renewals

For information about how you can add the Software Vertical Contract Renewals SuiteApp to your NetSuite account, contact your account representative.

Read the following topics for information about installing and setting up the Software Vertical Contract Renewals SuiteApp:

- Installing the Contract Renewals SuiteApp
- Roles and Permissions for Contract Renewals
- New Forms, Fields, and Records for Contract Renewals

- Initial Setup Tasks for Contract Renewals
- Setting Up Contract Renewals Preferences
- Setting Up Multiple Script Queues or Processors to Process Contract Renewals
- Setting Up Install Base Field Mapping

After installing the SuiteApp, you can configure the feature to work according to your company's contract and renewal workflow. Before you begin using the Software Vertical Contract Renewals SuiteApp, you should set up the following records that you will use when creating contracts:

- Creating Uplift Types for Contract Renewals
- Setting Up Maintenance/Support for Contract Renewals
- Setting Up Product Lines for Contract Renewals
- Setting Up Items for Contract Renewals

Installing the Contract Renewals SuiteApp

Prerequisites

Make sure that the following features are enabled in your account prior to installing Contract Renewals:

- Custom Records
- Client SuiteScript
- Server SuiteScript

For information about enabling these features, see the help topic Enabling Features.

Installing the Contract Renewals SuiteApp

Install the following bundle for the Contract Renewals SuiteApp:

- Bundle Name: SWV Contract Renewals Module
- Bundle ID: 187488
- Availability: Shared

For information about purchasing the Software Vertical Contract Renewals SuiteApp, contact your account representative.

For information about installing SuiteApps, see the help topic Installing a Bundle.

The Software Vertical Contract Renewals SuiteApp is a managed SuiteApp and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

Roles and Permissions for Contract Renewals

The following custom roles are included in the Software Vertical Contract Renewals SuiteApp:

- Renewals Manager
- Customer Center - Distributor
- Customer Center - End User
- Customer Center - Reseller

- CEO
- CFO
- Marketing Executive
- PS Executive
- PS Person
- Sales Executive
- Sales Rep
- Support Manager
- Support Person

These roles are pre-configured with a default set of associated permissions required to use the Contract Renewals SuiteApp. A NetSuite administrator can assign them to users or use them as templates when creating new roles or modifying existing roles. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

To view the default permissions assigned to these roles, go to Setup > User/Roles > Manage Roles, and then click the link for the role.

The following table lists the record permissions required to use the Contract Renewals SuiteApp:

Important: Be sure to add the Contract Renewals Preferences permission to non-administrator roles to allow them to view or edit Contract Renewals transaction forms.

Permission	Subtab	Permission Level
SuiteScript	Setup	View
Contract	Custom Record	Full
Contract Item	Custom Record	Full
Contract Renewals Preferences	Custom Record	Full
Deleted Contract Audit	Custom Record	Full
Deleted Contract Item Audit	Custom Record	Full
Install Base Field Mappings	Custom Record	Full
Maintenance/Support Types	Custom Record	Full
Product Lines	Custom Record	Full
Renewal Tran Form Mapping	Custom Record	Full
Transaction Status	Custom Record	Full
Uplift Cap Types	Custom Record	Full
Uplift Types	Custom Record	Full
Contract Renewal Action	Custom Record	Full

New Forms, Fields, and Records for Contract Renewals

The Software Vertical Contract Renewals SuiteApp uses forms, fields, and records that are available only when the SuiteApp is installed.

The following objects are created in your NetSuite account when you install this SuiteApp:

Contract Renewals tab	The Software Vertical Contract Renewals SuiteApp creates a custom center tab named Contract Renewals. This tab contains reports and other links related to Contract Renewals. You can customize this tab to show the KPIs and other metrics that you use in managing your software business. For more information, see Contract Renewals Reports and KPIs.
Contract record	The contract record holds all of the install base information including start and end dates, customer and end user, renewal date, and each contract item. You can access contract records from the sales transaction or customer record that is associated with the contract. You can also view a list of contracts when logged in as an administrator by going to the Contract List page. For more information, see Viewing a Contract. For information about contracts, see Contract Creation Process and Managing Contracts.
Contract Item records	Contract items are created from the line items of transactions. You can access contract item records from the contract or customer record, or by going to the Contact Item List page. On the Contract Items subtab of item records, you can also view a list of contracts that is associated with the item. **Note:** In accounts with **Make Copy** available under **Actions**, do not use this to create copies of Customer records with Contract Items. Doing so may also create copies of the Contract Items in the duplicate Customer record, which will cause issues. If you want to use Make Copy to create a duplicate of a Customer record with Contract Items, you should remove the Contract Items from the Customer record first. Or, you can avoid using the Make Copy action and create a new Customer record instead.
Platform transaction forms	The SuiteApp includes platform forms for each transaction type that can generate contracts and contract items: quote, opportunity, sales order, cash sale, credit memo, and return authorization. You can customize these forms. For more information, see Setting Preferred Forms for Contract Renewals.
Platform item fields	Item records define how contracts and contract items are generated. For more information, see Setting Up Items for Contract Renewals.
Channel subtab on transactions	If you manage reseller and distributor relationships, you can track this on the Channel subtab of transaction forms. For more information, see Support for Multiple Sales Channels.
Contract Items script (R03)	This script generates contract items from transactions at scheduled times. The following script deployment records are included with this script: ▪ R3: Create Contract Items ▪ R03: Create Contract Item hourly Both script deployments are initially set to Not Scheduled. You can use the R03: Create Contract Item hourly script deployment record to set a regular schedule for contract item creation. For information about setting the timing of this script, see Setting Up Schedules for Contract Item Creation and Contract Renewal.
Contract Renewals script (R05)	This script creates contract renewal transactions some time before the end of contract terms. By default, renewal transactions are generated based on the value of the Days Before Renewal preference. For more information, see Setting Up Contract Renewals Preferences. The following script deployment records are included with this script: ▪ Create Renewal Transactions

	▪ R05: Create Renewal Trans nightly Both script deployments are initially set to Not Scheduled. You can use the R05: Create Renewal Trans nightly script deployment record to set a regular schedule for contract renewal. For information about setting the timing of this script, see Setting Up Schedules for Contract Item Creation and Contract Renewal.

For a complete list of objects that are included in the Software Vertical Contract Renewals SuiteApp, go to Customization > SuiteBundler > Search & Install Bundles > List. Click the SWV Contract Renewals SuiteApp, and click the Components subtab.

Default Forms for Contract and Contract Item Records

Enhanced contract and contract item forms are available in Software Vertical Contract Renewals version 16.1. The enhanced forms display the Contract Items subtab as the default subtab for contract records, and the Contract Item Details subtab as the default subtab for contract item records. The following table shows the details of the old standard forms and the enhanced forms for contract and contract item records.

Record Type	Standard Form	Enhanced Form
Contract	Form Name: **Standard Contract Form** Subtabs: ▪ Notes ▪ Files ▪ Contract Items ▪ Transactions ▪ Renewal Contracts ▪ Deleted Contract Items	Form Name: **Contracts Form** Subtabs: ▪ Contract Items ▪ Transactions ▪ Renewal Contracts ▪ Notes ▪ Files ▪ Deleted Contract Items
Contract Item	Form Name: **Standard Contract Item Form** Subtabs: ▪ Notes ▪ Files ▪ Contract Item Details	Form Name: **Contract Item Form** Subtabs: ▪ Contract Item Details ▪ Notes ▪ Files

By default, these enhanced forms are assigned as the default form for contract and contract item records for users with a Renewals Manager [SWE] or Sales Person role. If you want to set these forms as the preferred forms for custom roles, do the following.

To set the preferred contract and contract item forms for custom roles:

1. Go to Setup > User/Roles > Manage Roles.
2. Edit the role.
3. Click the **Forms** subtab.
4. Click the **Custom Records** subtab.
5. Check the box in the **Preferred** column for **Contracts Form** and **Contract Item Form**.
6. Click **Save**.

Initial Setup Tasks for Contract Renewals

Before using the Software Vertical Contract Renewals SuiteApp, complete the following tasks:

- Setting Preferred Forms for Contract Renewals
- Creating a Zero Price Item
- Setting Initial Renewals Preferences
- Setting the Order of Contract Renewal Scripts on Transaction Records

Setting Preferred Forms for Contract Renewals

Before you begin using the Software Vertical Contract Renewals SuiteApp, set the custom forms you want to use as Preferred.

To set your preferred forms:

1. Go to Customization > Forms > Entry Forms.
2. Check the box in the **Preferred** column for the following entry forms (From Bundle: 187488):
   - Customer Form - Contract Renewals
   - Item Group - Contract Renewals
   - Inventory Item - Contract Renewals (available only if the Inventory feature is enabled)
   - Non-Inventory Item - Contract Renewals
   - Project Form - Contract Renewals
   - Vendor Form - Contract Renewals
3. Click **Submit**.
4. Go to Customization > Forms > Transaction Forms.
5. Check the box in the **Preferred** column for the following transaction forms (From Bundle: 187488):
   - Cash Sale - Contract Renewals
   - Credit Memo - Contract Renewals
   - Invoice - Contract Renewals
   - Opportunity - Contract Renewals
   - Quote - Contract Renewals
   - Return Authorization - Contract Renewals
   - Sales Order - Contract Renewals
6. Click **Submit**.

Alternatively, you can also create copies and customize these locked forms to meet the specific needs of your business. For more information, see the help topic Creating Custom Entry and Transaction Forms.

> **Note:** When you customize transaction forms, make sure that the **Renewals Exclusion** column is shown in the item sublist. On the **Screen Fields** tab on the custom transaction form, make sure that the **Show** box for **Renewals Exclusion** on the **Columns** subtab is checked. This field is used by the contract item creation script (R03) to determine whether to set the contract's **Renewals Exclusion** field to true or false.

Creating a Zero Price Item

Zero price item is used by Contract Renewals to retrieve dynamic values when generating renewal transactions; but it is not saved or added to any transactions. To make it work, you must set it up as an

item that is available to all transactions in the account. For OneWorld accounts, the zero price item should be allowed on all subsidiaries.

To create a zero price item:

1. Go to Lists > Accounting > Items > New (Administrator), and select the item type.
2. In the **Item Name/Number** field, enter a name for the item.
3. On the **Sales / Pricing** subtab, set the **Base Price** to **0**.
4. For OneWorld accounts, select the root parent subsidiary in the **Subsidiary** field, and then check the **Include Children** box.
5. Click **Save**.

Setting Initial Renewals Preferences

After you have created the zero price item, go to Contract Renewals > Setup > Contract Renewals Preferences. Click Edit to set the following preferences:

- On the **Contract Items Creation** subtab, set the following preferences if you want to use a custom saved search to define the list of transactions that will be processed for contract item creation.
  - Check the **Use CI Pending Creation Search** box.
  - In the **Search: CI Pending Creation** field, specify the custom saved search that you want to use for contract item creation. For more information, see Using a Custom Saved Search for Contract Item Creation.

  > **Note:** If you do not want to use a custom saved search, keep the **Use CI Pending Creation Search** box cleared. If this box is cleared, the contract item creation script (R03) will use its default search to identify the transactions to be processed for contract item creation.

- On the **Contract Renewals Creation** subtab:
  - Set the **Default Renewal Form ID** field to **Sales Order - Contract Renewals.**
  - In the **Zero Dollar Item** field, select the zero-price item you created in the previous section. See Creating a Zero Price Item.
  - In the **Assign to Employee/Default** field, select an employee who has been marked as a sales rep.
- On the **Item "Renew With" Sync** subtab:
  - Set the **Contract Item Search** field to **Contract Item Renew With Sync.**

For more information about these preferences, see Setting Up Contract Renewals Preferences.

Setting the Order of Contract Renewal Scripts on Transaction Records

To set the order of Contract Renewal scripts on transaction records:

1. Go to Customization > Scripting > Scripted Records (Administrator).
2. Click the **Record** column heading to sort the list by record.
3. Click **Edit** next to a record, and then do the following:

- On the **User Event Scripts** subtab, make sure the scripts are listed in the following order:
  - R02A-UES-1: Check Tran Into Log
  - R02A-UES-2: Calculate Tran Lines
  - R02A-UES-3: Calc In-Line Discounts

> **Note:** By default, these user event scripts are deployed only on the sales order transaction form. If you want to use CSV import and SOAP web services on the estimate record, you must deploy these scripts on the estimate transaction form.

> **Note:** The old scripts R01C-SS: Calculate Tran Lines and R01D-SS: Calc In-Line Discounts are no longer supported by the Contract Renewals SuiteApp, so they are disabled by default (Status = Testing, Deployed = Not Checked). These scripts are replaced by R02A-UES-2: Calculate Tran Lines and R02A-UES-3: Calc In-Line Discounts. Make sure that you are using the new user event scripts on your transaction forms.

- On the **Client Scripts** subtab, make sure the scripts are listed in the following order:
  - R01A-CS: HeaderAutomate&Validate
  - R01B-CS: TranLinesAutomate&Validate

> **Note:** Make sure the client scripts are also deployed in these transaction forms: credit memo, invoice, opportunity, quote, return authorization, sales order, and estimates.

4. Click **Save**.

Setting Up Contract Renewals Preferences

Before using Contract Renewals for the first time, you should set your preferences according to Setting Initial Renewals Preferences.

To set your Software Vertical Contract Renewals SuiteApp preferences, go to Contract Renewals > Setup > Contract Renewals Preferences, and click **Edit**. When you are finished making changes, click **Save**.

- Auto Place Decimal
- Transactions Validation
- Contracts Creation & Validation
- Contract Items Creation
- Contract Renewals Creation
- Item "Renew With" Sync
- Item Fields Validation
- Contract Item Fields

Auto Place Decimal

Go to Home > Set Preferences > General. In the Formatting section, make sure the Auto Place Decimal box is cleared. Enabling this preference may cause unwanted updates to transaction amounts calculated by Contract Renewals transaction processing.

Transactions Validation

The following preferences determine how transaction lines operate with the Software Vertical Contract Renewals SuiteApp:

Field	Description
Enable Script R01A	Check this box to enable the script that validates transaction start and end dates.
Item Cats for Tran Line Automation	Select the item categories that automatically update with start and end dates from the transaction body when you enter line items on a transaction. **Note:** **Service - Perpetual** and **License - Perpetual** items are automatically updated with contract start dates but have no end dates.

Enable Script R01B	Check this box to enable the script that validates the channel tiers on transactions.
	
	Important: When the R01B script is disabled, you cannot downsell or upsell from the contract record.
	
	When the R01B script is enabled:
	
	▪ The **Bill to Customer** field is disabled on the transaction form. The script will automatically set the value of this field based on the channel tier selected in the **Bill to Tier** field.
	▪ The **Bill to Tier** and **Ship to Tier** fields are set to **End User** by default. You can manually change the values of these fields, but the script automatically sets them when you change either the **Distributor** or **Reseller** field, or both.
	  ▫ If you set the value of the **Distributor** field, regardless if the **Reseller** field is set or blank, the script sets **Bill to Tier** and **Ship to Tier** to **Distributor**.
	  ▫ If you set the value of the **Reseller** field and leave the **Distributor** field blank, the script sets **Bill to Tier** and **Ship to Tier** to **Reseller**.

Enable Script R01C	Check this box to enable the script that calculates the rate of each item on transactions. When the R01C script is enabled: ▪ The **Amount** and **List Rate** of line items are editable. ▪ **List Rate** is calculated based on the **Rate**. ▪ **Rate** is calculated based on the **Term/Contract Pricing**.
Default M/S Pricing Option	Select the default pricing option for maintenance and support (M/S) items. ▪ **Itemized M/S Price** – Enables you to set maintenance or support rates on transactions. ▪ **M/S as a % of License List Price** – Calculates M/S item price as percentage of the total of the lines on the transaction. Discounts are not considered in this calculation. This option is the default setting. ▪ **M/S as a % of License Net Price** – Calculates M/S item price as percentage of the total of the lines on the transaction. Discounts are considered in this calculation. When you create an item record for an M/S item, the value that you set in this field will be the default selection in the **M/S Pricing Option** field on the item record. This value will also be the default pricing option for M/S items with a blank **M/S Pricing Option** field on the item record. For more information, see Setting Up Items for Contract Renewals.
Item Cats Skipped on Renewal Calcs	Select the item categories whose price level must always be set to Custom. This setting is important for maintenance and support item categories that are based on a percentage of license on the original order but exist alone on the renewal order.

Field	Description
Item Category = For Custom Price Block	Select the item categories whose price level cannot be set to Custom. This setting enables sales representatives to apply discounts to line item rates but not change them. **Note:** Items whose Item Category is selected or set For Custom Price Block (items that cannot have custom price) are excluded or cannot be added to sales orders used for creating transactions through web service, unless Block Custom Price Level is set to No (2). See Adding Transaction Fields to a Web Service Request for Contract Renewals.
Default Customer Discount on Trans	Check this box if you want to apply customer discounts to transactions by default. You can remove or change this discount on individual transaction lines if the box for **Inline Discounting on Trans** preference is checked.
M/S Customer In-Line Discount	Check this box if you want to apply customer discounts to the cost of maintenance and support by default. You can remove or change this discount on individual transaction lines if the box for **Inline Discounting on Trans** preference is checked.
Enable Script R01D	Check this box to enable the script that validates items with inline discounts. If this box is checked, inline discounts are automatically applied to the **Rate** and **Amount** fields on transaction lines.
Inline Discounting on Trans	Check this box to enable inline discounts on transaction lines. This preference is applied only when the inline discount calculation script (R01D) is deployed.
Enable Script R01E	Check this box to enable the script that prevents applying contract item uplift when the status is not active. This preference applies only on edit mode.
No. of Decimal Places for List Rate	Enter the number of decimal places to include for list rates. Maximum value is 8, which is the core NetSuite limit for list rate. **Note:** Value for list rate is rounded to the nearest decimal place specified in this preference before it is used for rate calculation.
No. of Decimal Places for Rate	Enter the number of decimal places to include for rates. Maximum value is 8, which is the core NetSuite limit for rate.
Auto-select Single Contract	Check this box if you want to automatically select the open contract if only one active contract is available for the **Bill To** and **End User** customers selected on the transaction. This setting ensures that you always upsell to an existing contract instead of creating a new one.
Override Default Ship To Address	Check this box if you want to automatically set the **Ship To** address on transactions to the default shipping address of the entity selected in the **Ship To Tier** field.
Entry Forms to Deploy Scripts	If you want the Contract Renewals scripts to run only for specific entry forms, select the entry forms in this field. If no form is selected, the scripts are deployed to all entry forms in this list.

Field	Description
Transaction Forms to Deploy Scripts	If you want the Contract Renewals scripts to run only for specific transaction forms, select the transaction forms in this field. If no form is selected, the scripts are deployed to all transaction forms in this list. **Note:** The **Make Copy** button is hidden on forms selected in this preference. If no form is selected, the **Make Copy** button is hidden on all transaction forms where Contract Renewals user event scripts are deployed.
Enable Flexible Start Date for Renewal Transactions	Check this box if you want to enable flexible start dates for contract items on renewal transactions. If this box is checked, you can set up contract items to start earlier than the renewal contract start date. This feature is applicable only for renewal transactions and for upsell sales orders for renewal contracts. For more information, see Editing a Renewal Transaction.

Contracts Creation & Validation

The following preferences affect contract creation and validation of contract items:

Field	Description
Enable Script R02A	Check this box to enable the script that validates items before creating contracts.
Enable Script R02B	Check this box to enable the script that validates contract items.
Sales Order Status to Create Contract	Select the minimum sales order status that will be processed for contract creation. ▪ **Sales Order: Pending Approval** – Select this option if you want to create a contract upon saving of the sales order, even if the status of the order is still Pending Approval. This option is the default setting. ▪ **Sales Order: Pending Fulfillment** – Select this option if you want to create a contract when a sales order is approved. You can manually create a contract for specific sales orders by clicking the **Create Contract** button on the transaction record. This button is available on sales orders with no associated contract record yet. For more information, see Creating a New Contract. This preference applies only to new sales orders. For renewals, a renewal contract is automatically generated if the renewal transaction is a sales order or when a renewal opportunity or estimate is converted to a sales order. For more information, see Renewing a Contract.

Contract Items Creation

The following preferences affect how contract items are generated:

Field	Description
Enable Script R03	Check this box to enable the script that creates contract items.

Field	Description
	Note: The R03 script does not support multiple queues. To prevent unexpected behavior, make sure that all R03 deployments are assigned to the same queue.
Search: CI Pending Creation	If you want to use a saved search to define the list of transactions that will be processed by the R03 script for contract item creation, check the **Use CI Pending Creation Search** box and specify the saved search that you want to use in this field. The list returned by the saved search will be further filtered by the status selected in the **Transaction Status to Process** preference. **Note:** To avoid any errors, do not select the default search (**Contract Item Pending Creation**) in this field if the **Use CI Pending Creation Search** box is checked. For information about creating a custom saved search for contract item creation, see Using a Custom Saved Search for Contract Item Creation.
Transaction Status to Process	Select which transactions status will be processed to create contract items.
Item Category to Process	Select the item categories that generate contract items. **Note:** For service items, select **Service - Perpetual** to generate perpetually-licensed service items that have no expiration date and no renewal action is required or select **Services** to generate term-licensed service items.
Require License for M/S Items (Renewal)	Check this box if you want the contract item creation script (R03) to require product license items in transactions. Clear this box if you want to enable creation of contracts from transactions with no product license.
Use CI Pending Creation Search	Check this box if you want to use a saved search to define the list of transactions that will be processed by the R03 script for contract item creation. You can specify the saved search that you want to use in the **Search: CI Pending Creation** field. For information about creating a custom saved search for contract item creation, see Using a Custom Saved Search for Contract Item Creation. If this box is cleared, R03 will use its default search to filter transactions that will be processed for contract item creation. **Note:** Regardless if this box is checked or cleared, the transactions to be processed by R03 will be filtered based on the status selected in the **Transaction Status to Process** field.

Contract Renewals Creation

The following preferences affect how renewal transactions are created:

Field	Description
Enable Script R05	Check this box to enable the script that creates renewal transactions.
Restrict to Customer	Check this box to create renewal transactions only for a specific customer.

Field	Description
	Important: This setting is used for testing purposes. Be sure to clear this box when you are finished testing.
Default Renewal Form ID	Select the custom transaction form you want to use when creating renewal transactions. For more information about contract renewals transaction forms, see Setting Preferred Forms for Contract Renewals.
Renewal Form Based From	If you are using multiple renewal transaction forms, select whether you want the form chosen based on subsidiary or channel tier. If this field is blank, the form selected in the **Default Renewal Form ID** field is used.
Zero Dollar Item	Zero price item is used by Contract Renewals to retrieve dynamic values when generating renewal transactions. For more information, see Creating a Zero Price Item.
Renewals License Pricing Model	Select the pricing model that you want to use for contract value calculation and pricing of renewed items. For information about how contract values are calculated for each pricing model, see Contract Value Calculation. ▪ **Current License List Rate – Price Level on Customer Record** – Calculates the contract value based on the price level set on the customer record and its corresponding price specified on the item record. If there is no price level specified on the customer record, the base price on the item record is used to calculate the contract value. ▪ **Historical License List Rate – From Tran Line** – Calculates the contract value based on the price level and list rate specified on the contract's source transaction. ▪ **Current License List Rate – Price Level on Contract** – Calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record. If a custom price level is specified on the source transaction (that is, contract price level is blank), the base price on the item record is used to calculate the contract value. ▪ **Current License List Rate – Price Level on Contract with Custom Price Handling** – Calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record, with the option to set a custom price on the source transaction. If a custom price level is specified on the source transaction (that is, contract price level is blank), the original list rate specified on the source transaction is used to calculate the contract value. When a custom price is set on the contract and the Renew With item is the same as the original item, the renewal contract uses the custom price for the item on the source transaction. If the Renew With item is different, the renewal contract uses the base price of the renewal item.
Days Before Renewal	Enter the number of days prior to a contract's end date when a renewal transaction is generated. Default value is 90. You can override this preference for specific contracts by specifying a value in the **Contract Days Before Renewal** field on the contract record. For more information, see Editing a Contract.
Default Renewal Period	Enter the default renewal term in months.
Transaction Type to Create	Select the type of transaction that is created by the renewal process.

Field	Description
	Note: When creating a renewal transaction form mapping, the transaction type on the mapping must match the value set in this preference. Otherwise, the contract will not be renewed. To create a renewal transaction form mapping, go to Setup > Custom > Renewal Tran Form Mapping > New.
Assign To	Select whether the renewal transaction is assigned to a sales representative of the customer or to a specific employee. If you select **An Employee**, choose an employee in the **Assign to Employee/Default** field.
Assign to Employee/ Default	Select the employee to be assigned to renewal transactions by default.
Transaction Department Based On	Select how the department is set on the renewal transaction: ▪ **Sales Rep (Department, Location, and Class)** - The sales representative's department is set on the transaction. ▪ **None** – Department is not set on the transaction.
Transaction Location Based On	Select how the location is set on the renewal transaction: ▪ **Sales Rep (Department, Location, and Class)** - The sales representative's location is set on the transaction. ▪ **None** - Location is not set on the transaction.
Transaction Class Based On	Select how the class is set on the renewal transaction: ▪ **Sales Rep (Department, Location, and Class)** – The sales representative's class is set on the transaction. ▪ **Order Type** – Class is set with all order types. ▪ **None** – Class is not set on the transaction.
Include Tran Line Description	Check this box to copy transaction line descriptions to renewal transaction lines. Transaction line descriptions are always copied to contract item records.
Default Customer Discount Renewals	Check this box to apply customer discounts on renewal transactions by default.
M/S In-Line Discount	Check this box to apply a line item discount to maintenance and support items. This preference applies only when the **Inline Discounting on Trans** preference is checked.
Combine Like Items	Check this box to combine similar line items on renewal transactions. Line items are combined if the item, end date, and list rate all match.

Field	Description
	Note: When items have different discount rates, no discount rate will be applied to the combined item. **Note:** When the original transaction contains same items that use custom price levels with different list rates, these items are not combined if the Renewals License Pricing Model is either **Current License List Rate — Price Level on Contract with Custom Price Handling** or **Historical License List Rate — From Tran Line**. Otherwise, the said same items are combined.
Require Same Discount when Combining Like Items	Check this box to combine like items only when the items have the same discount rates.
Apply Upsell and Downsell on Renewal Transaction	Check this box if you want to include upsell and downsell items when generating contract items on renewal transactions. Contract items will be classified by order type on the renewal transaction. Added items are classified as upsell and removed items are classified as downsell. Clear this box if you want to include only the final items (after upsell and downsell orders are applied to the original contract) when generating contract items for renewal transactions.

Item "Renew With" Sync

Field	Description
Enable Script R09	Check this box to enable the script that obtains the **Renew With** value from the item record and copies it to the corresponding field on the contract item record.
Contract Item Search	Select the saved search used by the process that updates the **Renew With** field on contract item records based on the updated item records.

Item Fields Validation

Field	Description
Enable Script R10	Check this box to enable the script that validates item details on item records.

Contract Item Fields

Field	Description
Enable Script R12A	Check this box to enable the script that validates contract item details.
Enable Script R12B	Check this box to enable the script that calculates the contract's current value and its renew value.

Using a Custom Saved Search for Contract Item Creation

The contract item creation script (R03) uses a default search to identify the list of transactions that will be processed for contract item creation. If you want to use a custom transaction search for contract item creation, you should set the following preferences:

- **Use CI Pending Creation Search** – Check this box if you want to use a custom saved search to define the list of transactions for contract item creation.
- **Search: CI Pending Creation** – Specify the custom saved search that you want to use for contract item creation. For more information, see Guidelines for Creating a Custom Search for Contract Item Creation.

These preferences are available on the Contract Items Creation subtab of the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

Guidelines for Creating a Custom Search for Contract Item Creation

If the **Use CI Pending Creation Search** box is checked, you cannot use the default saved search **Contract Item Pending Creation** (or any custom search based on this saved search) in the **Search: CI Pending Creation** field. Instead, you must create a new saved search following these guidelines:

- Search type must be Transaction.
- Search must be set to Public.
- To avoid any errors, the search must not include the following filters:
  - Main Line
  - Check Log Status (Custom Body)
  - Contract: Status
  - Created From
  - Contract (Custom Body)
  - Status
  - End User: Inactive
  - Distributor: Inactive
  - Reseller: Inactive
  - Type
  - Quantity Type (hidden) (Custom Column)
  - Item Category (hidden) (Custom Column)

For information about creating saved searches, see the help topic Defining a Saved Search.

Setting Up Schedules for Contract Item Creation and Contract Renewal

You can also set up the timing of the scripts that generate contract items and renewal transactions.

To change the timing of the contract items script (R03):

1. With the Administrator role, go to Customization > Scripting > Script Deployments.
2. Set the filters to show only script deployment records for the **R03-SS: Create Contract Items hrly** script.
3. Click the **Edit** link next to the **R03: Create Contract Item hourly** script deployment record.
4. On the **Schedule** subtab, set the frequency with which you want the script to run.

5. Click **Save**.

To change the timing of the contract renewal script (R05):

1. With the Administrator role, go to Customization > Scripting > Script Deployments.
2. Set the filters to show only script deployment records for the **R05-SS: Create Renewals nightly** script.
3. Click the **Edit** link next to the **R05: Create Renewal Trans nightly** script deployment record.
4. On the **Schedule** subtab, set the frequency with which you want the script to run.
5. Click **Save**.

Setting Up Multiple Script Queues or Processors to Process Contract Renewals

You can use multiple script queues or processors to divide contract renewals processing and run it in parallel. As of 2017.2, the SuiteCloud Processors feature supports a new system based on script processors rather than queues. It is possible to change script deployments to use processors instead of queues. With this feature, even queue-based processing runs on processors. For more information about this feature, see the help topic SuiteCloud Processors.

You can increase the number of queues or processors available to your account by purchasing SuiteCloud Plus licenses. For information, see the help topic SuiteCloud Plus Settings.

> **Note:** The R03 script does not support multiple queues. For deployments that continue to use queues, make sure that all R03 deployments are assigned to the same queue to prevent unexpected behavior.

To run the contract renewal scheduled script on multiple script queues or processors, you can create a new deployment definition. You must be logged in with the Administrator role to create new script deployments.

Take note of the following when creating and setting up additional deployments of the contract renewal script, **R05-SS: Create Renewals nightly**:

- **Using custom search** – You can specify a custom contract search in the **Custom Search** field on the **Parameters** subtab of the deployment record. Take note of the following when using custom searches:
  - You must use the same custom search on all R05 deployments. If there is no custom search specified for one deployment, all other deployments must also have a blank **Custom Search** field.
  - The custom search must be sorted by contract ID in ascending order.
- **Renewing specific contracts** – If you want to renew specific contracts only, you can use the following fields on the **Parameters** subtab of the deployment record:

  > **Important:** The following parameters should be set only on R05 deployments that are not scheduled. To avoid encountering issues on scheduled runs of the contract renewal script, be sure to remove any values set in these fields after any unscheduled runs.
  >
  > Alternatively, you can renew contracts on demand using the **Renew Now** button on individual contract records or the Renew Now: Batch Process page for bulk renewals. For more information, see Renewing a Contract.

  - **Contract ID** – Specify the ID of the contract that you want to renew. You can specify only one contract ID in this field.

  - **Single Contract** – Check this box if you want to renew only the contract specified in the **Contract ID** field. If this box is cleared, R05 will renew contracts starting with the contract ID specified, followed by succeeding contract IDs in ascending order.
- **Other parameters** – Do not specify values for the other fields on the **Parameters** subtab. These parameters are used by the R05 script during contract renewal processing.

Setting Up Install Base Field Mapping

With the Contract Renewals SuiteApp, you can copy values of custom fields from one record to another by setting up field mappings. You can select any of the following mapping directions:

- From original transaction to install base
- From install base to renewal transaction
- From original transaction to install base to renewal transaction
- From original transaction to renewal transaction

The install base can be the contract or contract item record.

Before setting up field mappings, be sure to do the following additional setup requirements:

- Create the corresponding custom fields on the source and target records.
- Use the same field type for the fields that you are mapping.
- For list/record type fields, make sure that the field values from the source field are also available in the target field.

Important: No validation is done during the field mapping setup process. If you are mapping from or to an invalid field (for example, a field ID that does not currently exist or an incorrectly spelled field ID), no field mapping will be executed.

To set up an install base field mapping:

1. Go to Setup > Custom > Install Base Field Mappings > New.
2. Enter a name for the field mapping.
3. Select a mapping direction:
   - **Orig Tran > Install Base** – Copies field values from the original transaction to the install base. Field values will be copied upon creation of the contract.
   - **Install Base > Renewal Tran** – Copies field values from the install base to the renewal transaction. Field values will be copied to the renewal transaction upon renewal.
   - **Orig Tran > Install Base > Renewal Tran** – Copies field values from the original transaction to the install base and renewal transaction. Upon contract creation, field values will be copied from the original transaction to the install base. Upon renewal, field values will be copied from the install base to the renewal transaction.
   - **Orig Tran > Renewal Tran** – Copies field values from the original transaction to the renewal transaction. For this option, you do not need to define the install base field because the field value is not copied to the install base.
4. In the **Install Base Type** field, select whether you want to map a custom field to a contract field or contract item field.

5. In the **Transaction Field Type** field, select whether you want to map a custom field to a body field or line field of a transaction.
6. In the **Transaction Field ID** field, enter the field ID of the transaction field that you want to map.
7. In the **Install Base Field ID** field, enter the field ID of the install base field that you want to map.
8. Click **Save**.

Note: Mapping to multi-select fields is currently not supported.

The Install Base Field Mappings list is loaded in alphabetical order.

Creating Uplift Types for Contract Renewals

Specifying uplift values enables you to maintain a consumer price index (CPI) or similar uplift. If you use an "original list rate" contract renewals pricing model, assigning an uplift type to your customers is important since the per-customer pricing on contract items is static in that pricing model.

To create uplift types:

1. Go to Contract Renewals > Setup > Uplift Types > New.
2. Enter a name for the uplift type.
3. In the **Uplift** field, enter the percentage the contract prices increase with renewal.
4. Click **Save**.

You can set the uplift type on the Contracts subtab of customer records. When the customer's contracts renew, the price will be increased by the percentage of the uplift type on the record.

Setting Up Maintenance/Support for Contract Renewals

Before you begin using the Software Vertical Contract Renewals SuiteApp, you should set up your maintenance and support items. Maintenance and support is often abbreviated as M/S on preferences and in other settings.

By default, maintenance and support costs ignore any discounts. If you want to consider customer discounts when calculating the cost of maintenance or support, you can enable the M/S Customer In-Line Discount preference on the Contract Renewals Preferences page. The M/S Customer In-Line Discount preference applies in-line discounts before calculating maintenance and support costs.

First, set your maintenance and support preferences at Contract Renewals > Setup > Contract Renewals Preferences:

- Default M/S Pricing Option
- Item Categories Skipped on Renewal Calculations
- M/S Customer In-Line Discount
- M/S In-Line Discount

For information about these preferences, see Setting Up Contract Renewals Preferences.

Next, an administrator can create maintenance and support types to represent the tiers of maintenance and support that you offer.

To create a maintenance and support type:

1. Go to Setup > Custom > Maintenance/Support Types > New.
2. Enter a name for the maintenance and support tier.
3. If you calculate maintenance or support as a percentage of license, enter the percentage for this tier.
4. Click **Save**.
5. Repeat these steps for each tier that you offer.

Finally, set up your support and maintenance items.

To create a maintenance or support item:

1. Go to Lists > Accounting > Items > New.
2. Select the item type for the M/S item that you want to create.
3. On the item form, make sure that the Contract Renewals custom form is selected in the **Custom Form** field. For more information, see Setting Preferred Forms for Contract Renewals.
4. Enter values in the fields on the Primary Information and Classification sections as you would in a standard item form. For more information, see the help topic Creating Item Records.
5. On the Vertical Classification section:
    1. In the **Term/Contract Pricing Type** field, select a pricing type for the item.
    2. In the **Product Line** field, select which product line this item belongs to.
    3. In the **Item Category** field, select the item category where this item should be included in. Choose one of the following categories for M/S items:
        - Maintenance - New
        - Maintenance - Renewal
        - Support - New
        - Support - Renewal
    4. In the **Quantity Type** field, select **M/S Entitlement**.
    5. In the **Renew With** field, select an item to replace the current item when it is renewed. If this item renews with itself, you can select this item in this field after you saved the item record.
    6. In the **Maintenance/Support Type** field, select the tier this item belongs to. The **Maintenance/Support %** field shows the percentage of the maintenance or support type that you selected.

        If your role grants you permission, click the plus sign icon to create a new maintenance or support tier.
6. In the **M/S Pricing Option** field, select the pricing option that you want to use for this M/S item. By default, this field shows the value that you set in the Default M/S Pricing Option preference. If you set this field to blank, the value in the Default M/S Pricing Option preference will be applied whenever this item is used on contracts.
7. On the **Pricing** subtab, enter the price of this item:
    - If the M/S pricing option is set to either **M/S as a % of License List Price** or **M/S as a % of License Net Price**, enter the base price as 0.00.

- If the M/S pricing option is set to **Itemized M/S Price**, enter the price of this item.

8. Enter other information related to this item. For information about setting up items for Contract Renewals, see Setting Up Items for Contract Renewals.
9. Click **Save**.

Note: If a contract includes a maintenance item and a support item from the same product line, only one of these items will be renewed. The Contract Renewals SuiteApp renews the M/S item with the highest internal ID and with an aggregated quantity greater than zero.

Setting Up Product Lines for Contract Renewals

Tracking product lines gives you another level of reporting beneath the item. Product lines also determine which transaction lines are considered when calculating support or maintenance costs if you charge maintenance or support as a percentage of license. For example, you might have a software product line that includes individual items for product licenses, module licenses, and maintenance/support contracts. You can also inactivate any product lines at any time.

An administrator can create product lines that reflect your company's product offerings.

To create product lines:

1. Go to Customization > List, Records, & Fields > Record Types.
2. Click the **New Record** link for Product Lines.
3. Enter a name for the product line.
4. Click **Save**.

You can set the product line in the **Product Line** field of item records. For information about setting up items for Contract Renewals, see Setting Up Items for Contract Renewals.

Setting Up Items for Contract Renewals

Item records define how renewal transactions and contracts are generated. If an item is set up for automated renewal, it is automatically included in contracts and renewal transactions.

Typically, contract items are defined with an item type of Non-inventory Item for Sale in NetSuite. The renewal behavior is determined by the fields under the Vertical Classification section on item records.

To set up items for Contract Renewals

1. Go to Lists > Accounting > Items > New.
2. Select the item type for the contract item that you want to create. Most contract items are defined with an item type of Non-inventory Item for Sale. For more information about NetSuite item types, see the help topic Creating Item Records.
3. On the Item form, make sure that a Contract Renewal custom form is selected in the **Custom Form** field. For more information about setting preferred forms, see Setting Preferred Forms for Contract Renewals.

4. Enter values in the fields on the Primary Information and Classification sections as you would in a standard item form. For more information, see the help topic Creating Item Records.
5. On the Vertical Classifications section, specify values for the fields that will determine the renewal behavior of the item.

Field Name	Description
Term/Contract Pricing Type	Select a contract pricing type for the item. The contract pricing type determines how the rate will be calculated for an item. The following contract pricing types are available: ▪ **Monthly** – Item price entered on the **Pricing** subtab is treated as a monthly price. ▪ **Annually** – Item price entered on the **Pricing** subtab is treated as an annual price. ▪ **Actual Item Price** – Item price entered on the **Pricing** subtab is considered as the actual rate. If you select this option, the term will not be considered in the rate calculation. ▪ **Not Applicable** – Select this option if none of the other options are applicable for the item. For example, for Perpetual Licenses or non-renewing items.
Product Line	Choose which product line this item belongs to. A product line is a family of items that are organized around one flagship product. For more information, see Setting Up Product Lines for Contract Renewals.
Item Category	Select the item category where this item should be included in. The item category determines whether an item is renewed and also when it is billed. The following item categories are available: ▪ License - Perpetual ▪ License - Term ▪ Maintenance - New ▪ Maintenance - Renewal ▪ Support - New ▪ Support - Renewal ▪ Services ▪ Services - Perpetual ▪ Training ▪ Other ▪ Hardware ▪ Parent Item **Note:** The Item Categories custom list is locked and cannot be edited. Perpetual items are not renewed and are paid in full up front. Examples of perpetual items are License - Perpetual, Services - Perpetual, Trainings, Hardware, and Other. For a perpetual item to appear on a renewal contract record, it must be accompanied by a corresponding maintenance item on the original contract. Both the perpetual item and the maintenance item must belong to the same product line. On a renewal contract record, perpetual items are listed in the Perpetual Contract Items field on the Contract Items subtab. Term-based items have start and end dates, and must have the **Term/Contract Pricing Type** field set to **Monthly** or **Annually** to be priced correctly in new

Field Name	Description
	and renewal transactions based on the Term In Months of the transaction line. Examples of term-based items are License - Term, Support - New, Support - Renewal, and Services. Term licenses are always renewed. Maintenance entitlements include software updates and support, are associated with perpetual licenses, and are always renewed. Support entitlements provide support for software only, are associated with term licenses, and are renewable.
Quantity Type	Select the quantity type that defines this item's units. The quantity type affects the renewal behavior of an item. **Important:** The Quantity Type must match the selected Item Category for the item. An incorrect combination may cause unprocessed renewals for the item. The following quantity types are available: ▪ **Product License** – This refers to core licensed items. You should have at least one product set up in your account per product line. A product license creates a Product and an Install Base record to represent a new sale. A follow-on sale creates an Install Base record tied to the existing Product record. Product License quantity type is used for items under the following item categories: ▫ License - Perpetual ▫ License - Term ▫ Services ▪ **Module License** – This refers to add-on items related to products. A module license cannot exist without a corresponding Product, and should not be sold this way. Module License quantity type is used for items under the following categories: ▫ License - Perpetual ▫ License - Term ▫ Services ▪ **M/S Entitlement** – This quantity type is used for items with item category of maintenance or support. Maintenance and support items require start and end dates that are a key part of the renewals automation. If the Require License for M/S Items (Renewal) preference is enabled, transactions with an M/S item must also have an item with a license quantity type for it to be processed for renewal. ▪ **User License - Production**, **User License - Other** – This represents the seats sold for the products and modules within the product line. Production Users can be differentiated from Other Users for reporting purposes. User License quantity type is used for items under the following item categories: ▫ License - Term ▫ Training ▪ **CPU License** – This refers to the number of Central Processing Units or CPU Cores that are licensed to the customer. CPU License quantity type is used for items under the following item categories: ▫ Hardware ▫ License - Term ▪ **Other** – This quantity type can be used for any item that does not fit in any of the preceding quantity types.

Field Name	Description
Renew With	Select an item to replace the current item when it is renewed. This setting is for renewable items only, that is, items with an item category of License - Term, Maintenance, or Support. Often, an item is renewed with itself, but you can choose any item in this field. You can also use this setting for versioning. For example, Version 1 can renew with Version 2.
Maintenance/Support Type	For maintenance or support items, if you offer tiered maintenance or support, choose the tier in this field. For information about maintenance and support types, see Setting Up Maintenance/Support for Contract Renewals.
Maintenance/Support %	This field shows the percentage price of the maintenance or support type that you selected.
Opt-Out M/S	Check this box if this item is not considered when calculating the cost of support or maintenance. For example, you do not count a sandbox license when determining the cost of support.
Replaced With	If the item has an end of life date after which it is no longer offered, choose the item that replaces the current item. The item you select here is added to future renewals in place of the item you are entering.
End of Life Date	Enter the date after which this item is no longer offered.
End of M/S Date	Enter the date after which support and maintenance will no longer be offered for this product. This is often some time after the end of life date.
Renewals Exclusion	Check this box if you do not want this item to be renewed.
M/S Pricing Option	If you are creating a maintenance or support item, select the pricing option that you want to use to determine the M/S item price. When you are creating a new item record, this field defaults to the value that you selected in the Default M/S Pricing Option preference. For more information, see Setting Up Contract Renewals Preferences. When you use this M/S item on transactions, the pricing option that you set on the item record is saved on the transaction and on the generated contract item record. If you set this field to blank, the value in the Default M/S Pricing Option preference will be applied whenever this item is used on contracts. If the item is set to renew with itself, the stored M/S Pricing Option value on the contract item record will be used for the renewal item. If the item is set to renew with a different item, the M/S Pricing Option value on the item record for the Renew With item will be used for the renewal item.

6. Specify the item price on the **Pricing** subtab.

> **Note:** When you enter pricing for percentage based maintenance and support items, you must set the base price to zero so that pricing is calculated correctly.

If you use the Project Management feature, be sure to enter a base price on the service item record or enter zero (instead of leaving the Base Price field blank) if the service item does not have a base price. For information about setting the base price of a service item see, Setting Up Item Pricing. For more information about the Project Management feature, see the help topic Using Project Management.

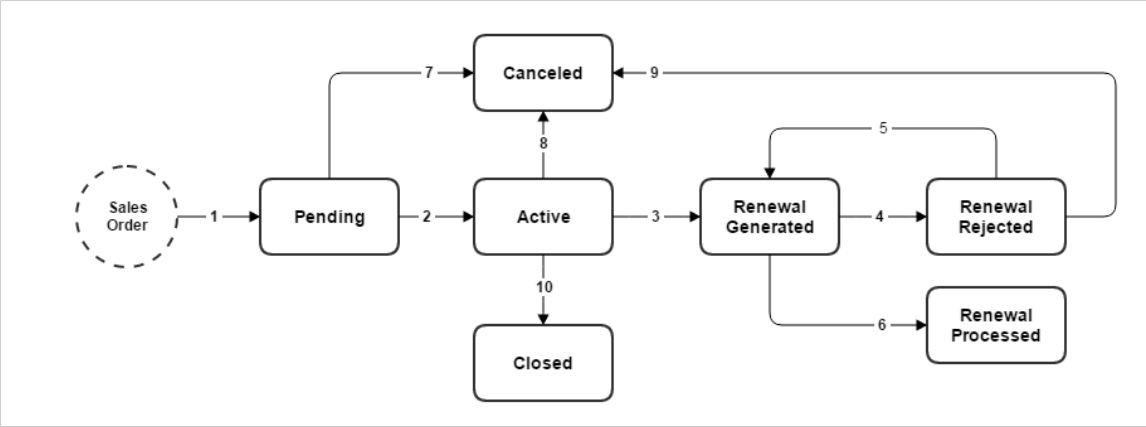
7. Enter values in the fields on the other subtabs as you would in a standard item form. For more information, see the help topic Creating Item Records.

   If you use the Advanced Billing and Advanced Shipping features and you do not want to fulfill orders, be sure to clear the **Can be Fulfilled/Received** box on the **Preferences** subtab for items that you include in contracts.

You must not use kits or assemblies for renewable software items because these item types do not include the derived information required to generate contract items. You can, however, use item groups to make entering transaction line renewable items easier. For more information about item groups, see the help topic Item Groups.

Contract Workflow

The following diagram shows the different states of a contract.



The contract's status is shown in the **Status** field on the contract record. For information about contract fields, see Contract Fields.

Non-perpetual items have the same status as the contract where they belong, while perpetual items always have a status of Active. The contract item's status is shown in the **Contract Item Status** field on the contract item record.

The following table describes the contract lifecycle. For information about what processes or actions are applicable for each contract status, see Managing Contracts.

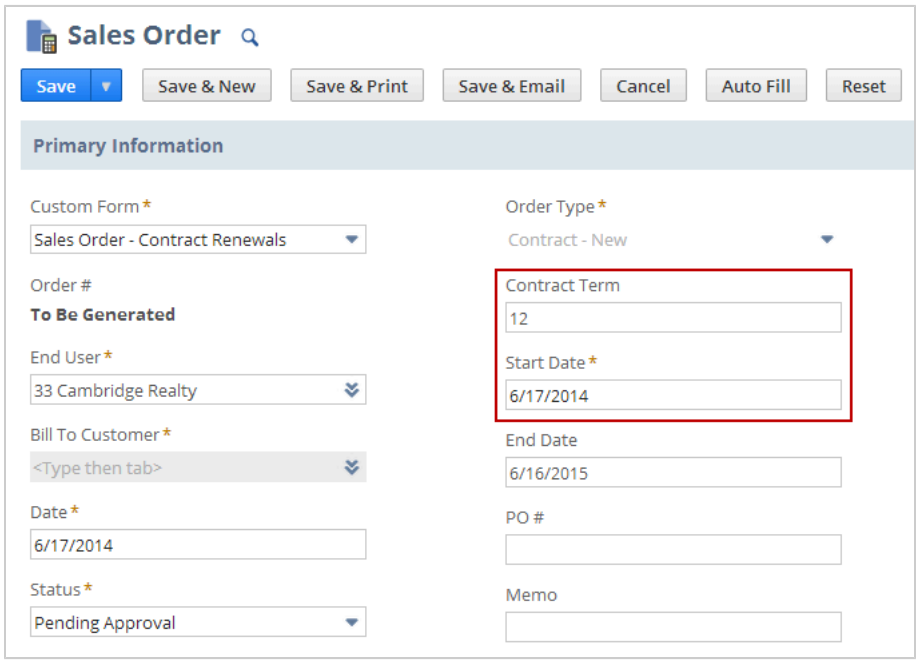
Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
Pending	1	When a contract record is created, its initial status is set to Pending. A contract remains in this state until its contract items are generated. For information about creating contracts, see Creating a New Contract.	Contracts are automatically generated by the R07 script (R07-MR: Create New Contracts) for new sales orders that match the Sales Order Status to Create Contract preference. To manually generate a contract for a new sales order, click the Create Contract button on the transaction record. For renewals, a renewal contract is automatically generated if the renewal transaction is a sales order, or when a renewal opportunity or estimate is converted to a sales order.
Active	2	When contract items are generated for the contract, its status changes from Pending to Active.	Contract items are generated by the R03 script (R03-SS: Create Contract Items hrly).

Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
Renewal Generated	3	When a renewal transaction is generated for the contract, its status changes from Active to Renewal Generated. A contract remains in this state until contract items are generated for the renewal contract. A renewal contract is automatically generated with an initial status of Pending if the renewal transaction is a sales order, or when a renewal quote or opportunity is converted to a sales order. The renewal contract's status remains in Pending until its contract items are generated. For information about renewing contracts, see Renewing a Contract.	Renewal transactions are generated by the R05 script (R05-SS: Create Renewals nightly) for active contracts with a target renewal date that is on or before the current date. To manually generate a renewal transaction, click the Renew Now button on the contract record. You can also perform batch renewals by going to Contract Renewals > Renewals Automation > Renew Now: Batch Process.
Renewal Rejected	4	When a contract's renewal transaction is rejected, its status changes from Renewal Generated to Renewal Rejected. You can reject a renewal transaction (opportunity, estimate, or sales order in Pending Approval status) if contract items are not yet generated for the renewal contract (that is, renewal contract is still in Pending status). For more information, see Rejecting a Renewal Transaction. When a renewal transaction is rejected, the status of the renewal contract changes from Pending to Canceled.	To reject a renewal transaction, click the Reject Renewal button on the transaction record.
	5	When you generate a new renewal transaction for a contract record with a status of Renewal Rejected, its status changes back to Renewal Generated.	To generate a new renewal transaction for a contract with a Renewal Rejected status, click the Renew Now button on the contract record.
Renewal Processed	6	When contract items are generated for the renewal contract, the preceding contract's status changes from Renewal Generated to Renewal Processed. Meanwhile, the renewal contract's status changes from Pending to Active after its contract items are generated.	Contract items are generated by the R03 script (R03-SS: Create Contract Items hrly) for renewal contracts.
Canceled	7	When a contract with a status of Pending, Active, or Renewal Rejected is canceled, its status changes to Canceled. Also, when a renewal transaction is rejected, the renewal contract's status changes from Pending to Canceled. Canceled contracts will not be processed for contract item creation, renewal, upsell, or downsell. For information about canceling contracts, see Canceling a Contract.	To cancel a contract, click Cancel Contract button on the contract record.
	8		
	9		
Closed	10	When you run the script that closes contracts, it searches for expired contracts and changes its status from Active to Closed.	To set the status of expired contracts to Closed, manually run the R08 script (SWV CR MR R08 Close Contracts).

Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
		Expired contracts are contracts with a current status of Active and an end date that is before the current date. For information about closing expired contracts, see Closing Expired Contracts.	

Contract Creation Process

With the Software Vertical Contract Renewals SuiteApp, contracts are generated from sales orders. When you enter a sales order using the Sales Order - Contract Renewal form, you define the term of the contract by setting the contract term and start date. For information about contract term, see Contract Term Calculation.

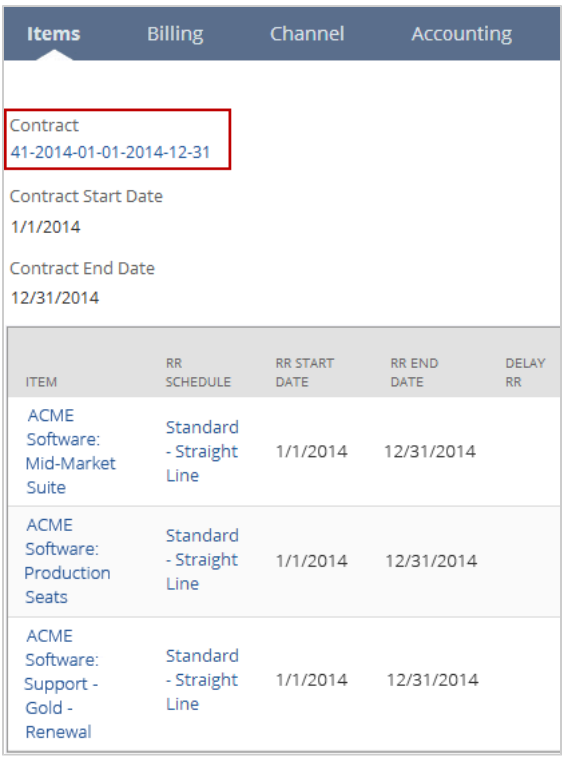


By default, line items added to the order are given the same start and end dates as the body of the transaction. You can modify the term length and the dates for individual line items.

The value that you selected in the **Sales Order Status to Create Contract** preference determines when a new contract is generated for a sales order. If you selected **Sales Order: Pending Approval**, a contract is generated and associated with the order after the sales order is saved (even if the sales order is not yet approved). If you selected **Sales Order: Pending Fulfillment**, a contract is generated when the sales order is approved. For information about this preference, see Setting Up Contract Renewals Preferences.

You can also create a contract for a specific sales order by clicking the **Create Contract** button on the transaction record. This button is available on sales orders with an empty **Contract** field (that is, a contract is not yet created for the order).

When a contract is generated for the order, a link to the contract record is shown in the **Contract** field on the **Items** subtab of the sales order.



When the order is fully billed (which is the default preference setup), contract items are added to the contract based on the line items on the sales order. By default, these contract items are set to be generated on an hourly basis, but you can change the frequency of this process by setting the schedule on the deployment record. For information about setting the timing of the contract item script (R03), see Setting Up Schedules for Contract Item Creation and Contract Renewal. For information about billing sales orders, see the help topic Invoicing Sales Orders.

On the contract record, the value of the contract is shown in the following fields:

- **Contract Value (Base Curr)** – For NetSuite OneWorld accounts, this field displays the value of the contract in the base currency of the customer's subsidiary. Otherwise, this field displays the value of the contract in the currency of your company.
- **Contract Value (Customer Primary Curr)** – This field displays the value of the contract in the primary currency of the customer.

For information about contract values, see Contract Value Calculation.

By default, 90 days prior to the end date of the contract, a renewal transaction is automatically generated for the contract. You can change when contract renewals are processed by setting the **Days Before Renewal** preference on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

You can also override the **Days Before Renewal** global preference for specific contracts by specifying a value in the Contract Days Before Renewal field on the contract record. For more information, see Editing a Contract.

Any items that are set up as renewable are automatically included on the renewal contract. For more information, see Contract Renewals Process.

Creating a New Contract

With Software Vertical Contract Renewals SuiteApp, contracts and their contract items are generated from sales transactions: opportunities, estimates, and sales orders. Opportunities and estimates must be converted to a sales order before a contract record can be generated. Contracts are created from sales orders using the Sales Order – Contract Renewals form or any customized version of this form.

You can choose when a contract record will be generated from a sales order in the **Sales Order Status to Create Contract** field on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

> **Note:** Contracts and contract items cannot be created manually, but you can import contracts using CSV import. For more information, see Importing Contracts.

To create new contract from a sales order:

1. Go to Transactions > Sales > Enter Sales Order.
2. In the **Custom Form** field, select **Sales Order - Contract Renewals**.
3. In the **End User** field, select a customer. If necessary, on the **Channel** subtab, define who this end user is relative to the customer in the **Bill To Customer** field.
4. In the **Contract Term** field, enter the number of months this contract runs. You can enter decimal numbers if you need to represent a term in days.
5. In the **Start Date** field, enter the start date for this contract. The end date is calculated automatically based on the contract term and start date values. For information about contract term, see Contract Term Calculation.

   > **Note:** By default, transactions created from an opportunity do not have a start date. You must manually enter the start date for these transaction records.

6. Enter values in the other fields on the transaction header as you would in a standard sales order. For more information, see the help topic Creating Sales Orders.
7. On the **Items** subtab:
   1. If this is an order for a new contract, leave the **Contract** field blank.

      If this is an upsell order for an existing contract, select a contract in the **Contract** field. For more information, see Contract Upsell.
   2. In the **Item** column, select items that you want to include in the contract. If you are creating a sales order from an estimate or opportunity, the items are populated from that transaction.

      If you want to apply a percentage uplift for a renewable item, enter the value in the Contract Item Uplift column. For more information, see Contract Item Uplift.

> **Note:** You may need to edit these items to ensure that the dates are set properly. The start and end dates for each item are populated from the transaction body. You can change these dates for items that do not apply to the full contract term.

> **Note:** If the sales order status is Pending Fulfillment, you will not be able to edit the line item dates after adding the item. Also, after adding the first line item, the start date column will be grayed out for succeeding line items. If you want to be able to modify the dates for each line item, change the status of the sales order to Pending Approval.

> **Important:** Items that do not co-terminate with the end of the contract are not renewed even if they are set up to be renewable.

8. If you want to set a custom price for any of the item, click the **Options & Log** subtab and set the following fields:
   - **Block Custom Price Level** – Default value is **Yes**. Set this field to **No** if you want to enable setting a custom price level for items in this transaction. This setting overrides the settings you made in the **Item Category = For Custom Price Block** preference on the Contract Renewals Preferences page, which blocks custom pricing for specific item categories. This setting applies only to non-maintenance/support items.
   - **Allow Custom Price Level for M/S Items** – Default value is **No**. Set this field to **Yes** if you want to enable setting a custom price level for maintenance and support items in this transaction. This setting overrides the settings you made in the **Item Category = For Custom Price Block** preference on the Contract Renewals Preferences page, which blocks custom pricing for specific item categories.
   - **Custom Price Entered is Annual Rate** – Check this box if you want to enter custom price level list rates as annual rates. This setting enables you to enter annual rates in the List Rate column for items with custom price level, to ensure proper calculation of the amount. In the end, the list rate will be divided by 12 months and stored as a monthly rate.
9. Click **Save**.

The value in the **Sales Order Status to Create Contract** preference determines when a new contract is generated for a sales order based on its status.

- If you selected **Sales Order: Pending Approval**, a contract is generated upon saving of the sales order (even if the order is not yet approved).
- If you selected **Sales Order: Pending Fulfillment**, a contract is generated upon approval of the sales order. In this case, a contract will not be automatically generated for sales orders with a status of Pending Approval. However, you have the option to create contracts on demand for sales orders with no contract yet by clicking the **Create Contract** button on the transaction record.

When a contract is saved or approved (depending on the preference set), a user event script saves the transaction record and creates a contract in the background. After the contract is created, the user event script triggers a workflow action that attaches the contract record to the sales order.

To improve performance, the contract creation user event script does not wait for the workflow action to finish attaching the contract to the sales order. For this reason, there may be instances when the **Contract** field on the **Items** subtab displays an incomplete contract ID and the **Check Log Status** field on the **Options & Log** subtab is empty after a sales order is saved.

To check if the workflow action has successfully attached the contract to the sales order, refresh the Sales Order page and check if the **Contract** field is displaying the complete contract ID and the value in the **Check Log Status** field on the **Options & Log** subtab is **Pending**.

Contracts are given an ID in the following format: **ID_<Start Date>_<End Date>**. Click the link in the **Contract** field on the sales order to go to the contract record.

Guidelines for Creating New Contracts

- Contract items are generated from the line items on the sales transaction. By default, contract items on new contracts are generated on an hourly basis, during the scheduled run of the R03 script. You can change the frequency of the contract item creation process by setting the schedule on the script deployment record. For more information, see Setting Up Schedules for Contract Item Creation and Contract Renewal.

  Alternatively, you can create contract items for a contract on demand. For more information, see On-Demand Create Contract Items.
- When Install Base Field Mapping contains conflicting field types, for example, from Date to Percent, no contract will be created upon saving the transaction.
- If the workflow action fails, the initial incomplete contract ID remains displayed on the Sales Order page in View mode. To completely attach the contract to the sales order, edit or update the page. When edited, the final contract name that is based on the initial contract record is assigned to the sales order and the **Check Log Status** field on the **Options & Log** subtab is set to **Pending**. If the sales order is updated through CSV import or Web service, a final contract record that is different from the initial record is assigned to the sales order, the **Check Log Status** field on the **Options & Log** subtab is set to **Pending**, and the initial contract record becomes an orphan.
- When creating a transaction saved search, do not include **Contract Field: Target Renewal Date** on the **Criteria** or **Results** subtab for transactions other than contracts. Doing so will result in error.

On-Demand Create Contract Items

You can create contract items on demand by clicking the **Create Contract Items** button on the contract record. This button is available for contracts that satisfy the following conditions:

- Contract is not Inactive.
- Contract status is Pending.
- Contract has no contract items.

To create contract items for a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the **View** link next to the contract that you want to create contract items for.
3. Click the **Create Contract Items** button.

A confirmation message is shown at the top of the contract record to confirm the creation of contract items. If contract items are successfully created, the status of the contract changes to Active and the **Check Log Status** field on the **Options & Log** subtab of the originating transaction is set to Processed.

The SuiteApp implements a validation logic to prevent contract items from being processed simultaneously, which may result to duplicate contract items on contracts. An error message is shown at the top of the contract record if you click the **Create Contract Items** button when an instance of the contract items script (R03) is already running.

Importing Contracts

You can import your existing contract and contract items using the CSV Import Assistant. For information about CSV files, see the help topic General CSV File Conventions

To import contracts into your NetSuite account, you must import both contracts and the associated contract items.

To import contract records:

1. Prepare a CSV file with your contract data.

   The following contract fields are required:

   - Name
   - End User
   - Bill To Customer
   - Contract Start Date
   - Contract End Date
   - Currency (if the Multiple Currencies feature is enabled)
   - Renewal Terms

   For more information about contract fields, see Contract Fields.
2. Go to Setup > Import/Export > Import Tasks > Import CSV Records.
3. In the **Import Type** field, select **Custom Records**.
4. In the **Record Type** field, select **Contract**.
5. Select the CSV import file with your contract data.
6. Click **Next**.
7. Follow the rest of the steps in Import Assistant. For more information, see the help topic CSV Imports.

To import contract item records:

1. Prepare a CSV file with your contract item data.

   The following contract item fields are required:

   - Bill To Customer
   - End User
   - Contract
   - Item
   - Contract Item Start Date
   - Contract Item End Date
   - Quantity
   - Original List Rate
   - Owner
2. Go to Setup > Import/Export > Import Tasks > Import CSV Records.
3. In the **Import Type** field, select **Custom Records**.
4. In the **Record Type** field, select **Contract Item**.
5. Select the CSV import file with your contract item data.
6. Click **Next**.
7. Follow the rest of the steps in Import Assistant. For more information, see the help topic CSV Imports.

Important things to note when importing transactions for contract renewals:

- When an imported sales order record (of Import Type: Transactions) includes conflicting contract term and end date values, the contract term value overwrites the end date's value with the calculated value. For information about contract term, see Contract Term Calculation.
- In transaction imports, line items for non-Perpetual item categories must have contract term and end date values to generate the end date for each item. If the values are missing, the import fails. The end date value can be mapped for a line item if the date is prior to or the same as the contract's end date.

Contract Renewals Process

On the scheduled run of the script that creates renewal transactions, a renewal sales order is generated for contracts that are within 90 days of its end date. The renewal sales order includes any renewal contract items from the expiring contract that extend to the contract end date. For information about editing renewal transactions, see Editing a Renewal Transaction.

> **Note:** You can change when renewal transactions are generated (Days Before Renewal) and the type of renewal transaction created (Transaction Type to Create) on the **Contract Renewals Creation** subtab of the Contract Renewals Preferences page. To set the these preferences, go to Contract Renewals > Setup > Contract Renewals Preferences. For more information, see Setting Up Contract Renewals Preferences.
>
> You can also override the Days Before Renewal preference for specific contracts by specifying a value in the **Contract Days Before Renewal** field on the contract record. For more information, see Editing a Contract.

If contract items on the expiring contract are the same, they are combined on the renewal contract. This occurs when additional items are added to a contract some time during its contract term. For items to be combined, the rates on each line must match. For more information, see Contract Upsell.

If you need to remove an item from a renewal transaction, change the quantity for the line item to 0 (zero) rather than removing the line item. This ensures that downsell is tracked properly and that any invoices created do not include 0 quantity line items.

If you are provisioning based on fulfillment transactions, transaction line items with zero quantity can be a signal to de-provision those items. If you are provisioning based on contract items, you can signal items to de-provision with negative-quantity contract items.

If there are return authorizations associated with a contract that are not approved before the active contract renewal, those return authorizations are not reflected in the renewal. For more information, see Contracts and Returns.

You can create reminders or saved searches for your dashboard to alert you when renewal transactions are generated. You can base your reminder on transactions with the Order Type set to **Renewal**. For more information, see the help topic Setting Up Reminders.

Software Vertical Contract Renewals SuiteApp also supports renewing contracts on demand by clicking the **Renew Now** button on a contract record. For more information, see Renewing a Contract.

Example

A software company sells a twelve-month software product license, a support entitlement, and 100 seats. Additionally, the contract includes a professional services item that ends three months into the contract.

When a contract is created from the sales order, the contract ID is shown in the Contract field on the saved sales order.

Initial Sales Order (Details of the Original Contract)

Items | Billing | Channel | Accounting | Relationships | Shipping | Communication | Related Records | Options & Log | System Information

Contract
39_2014-01-01_2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Enterprise Suite	Standard - Straight Line	1/1/2014	12/31/2014			Base Price	1,200		1	14,400.00	14,400.00					12	1/1/2014	12/31/2014
ACME Software: Production Seats	Standard - Straight Line	1/1/2014	12/31/2014			Base Price	100		100	1,200.00	120,000.00					12	1/1/2014	12/31/2014
ACME Software: Support - Gold - New	Standard - Straight Line	1/1/2014	12/31/2014			Base Price	3,136		1	37,632.00	37,632.00					12	1/1/2014	12/31/2014

By default, 90 days prior to the end date of the contract, a renewal sales order is created automatically.

In this example, the product license, the seats, and the support entitlement are all renewable items. The term of these items extends to the contract end date, so all three of these line items appear on the renewal order.

The professional services item is not renewable and ends prior to the contract end date, so this item is not included in the renewal order.

Renewal Transaction (Details of the Renewal Contract)

Items | Billing | Channel | Accounting | Relationships | Shipping | Communication | Related Records | Options & Log | System Information

Contract
41_2014-01-01_2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Mid-Market Suite	97	1/1/2014	12/31/2014			Custom	700		1	8,400.00	8,400.00					12	1/1/2014	12/31/2014
ACME Software: Production Seats	98	1/1/2014	12/31/2014			Custom	100		100	1,200.00	120,000.00					12	1/1/2014	12/31/2014
ACME Software: Support - Gold - Renewal	99	1/1/2014	12/31/2014			Base Price	2,996		1	35,952.00	35,952.00					12	1/1/2014	12/31/2014

Managing Contracts

Read the following topics for information about managing contract records.

- Viewing a Contract
- Editing a Contract
- Updating Contracts using Mass Update
- Renewing a Contract
  - Editing a Renewal Transaction
- Rejecting a Renewal Transaction
- Canceling a Contract
- Closing Expired Contracts
- Contract Upsell

- Contracts and Returns

The following table shows which actions are applicable to a contract based on its current status. For information about contract states, see Contract Workflow.

Contract Status	Available Actions (Contract Record Buttons)				
	Edit	**Upsell[1] (Edit Mode)**	**Downsell[1] (Edit Mode)**	**Renew Now (View Mode)**	**Cancel Contract (View/Edit Mode)**
Pending	Yes	Yes	Yes	No	Yes
Active	Yes	Yes	Yes	Yes	Yes
Renewal Generated	Yes	Yes	Yes	No	No
Renewal Processed	Yes	Yes	Yes	No	No
Renewal Rejected	Yes	Yes	Yes	Yes[2]	Yes
Canceled	No	No	No	No	No
Closed	No	No	No	No	No

[1] Contract is also available for selection in the Contract field on a standalone upsell sales order or downsell RMA.

[2] Contract is renewable only through the Renew Now button. Renewal rejected contracts will not be renewed by the contract renewal script (R05) or by Renew Now: Batch Process.

Viewing a Contract

You can access a contract record from the sales transaction or customer record that is associated with the contract. A list of all contracts is also available on the Contract List page.

To view a contract record:

- From the Sales Order – Go to Transactions > Sales > Enter Sales Orders > List. View the sales order that is associated with the contract. On the **Items** subtab, click the link in the **Contract** field.
- From the Customer record – Go to Lists > Relationships > Customers. View the customer record that is associated with the contract. On the **Contracts** subtab, click the name of the contract.
- From the Contract List page – Go to Contract Renewals > View Records > Contracts. You can also access the Contract List page from Lists > Custom > Contract. Click the **View** link next to the contract.

Editing a Contract

To edit a contract, go to the contract record and click the Edit button. You can access the contract record from the sales transaction or customer record that is associated with the contract. A list of all contracts is also available on the Contract List page. For more information about viewing contract records, see Viewing a Contract.

You can edit a contract to make any of the following changes:

- Create an upsell order for the contract by clicking the **Create Up-Sell Order** button. For more information, see Contract Upsell.
- Create a downsell RMA for the contract by clicking the **Create Down-sell RMA** button. For more information, see Contracts and Returns.
- Cancel the contract by clicking the **Cancel Contract** button. For more information, see Canceling a Contract.

- Modify the renewal term for the contract by specifying a value in the **Renewal Terms** field.
- Override the Days Before Renewal preference for the contract by specifying a value in the **Contract Days Before Renewal** field.
- Override the customer uplift for the contract by specifying a value in the **Contract Uplift** field.
- Override the customer uplift, contract uplift, or both by specifying a value in the **Contract Item Uplift** field on the contract item record. For more information, see Contract Item Uplift.

For information about contract fields, see Contract Fields.

Contracts can also be updated using CSV import or mass update. For more information, read the following help topics.

- Importing Contracts
- Updating Contracts using Mass Update

Contract Fields

The following table provides descriptions for the fields on contract records.

Field Name	Description
Name(1)	This field displays the name of the contract in the following format: **ID_<Start Date>_<End Date>**.
ID	This field displays the internal ID of the contract.
Inactive	On edit mode, check this box to set the contract to inactive.
Status	This field shows the status of the contract. Depending on the contract's current state, the status can be one of the following: ▪ Pending ▪ Active ▪ Renewal Generated ▪ Renewal Processed ▪ Renewal Rejected ▪ Canceled ▪ Closed For information about contract states, see Contract Workflow.
Contract Start Date(1)	This field displays the date when the contract starts. This value is set in the **Start Date** field of the sales order from which the contract is created.
Contract End Date(1)	This field displays the date when the contract is due for termination. This value is set in the **End Date** field of the sales order from which the contract is created. On the sales order, the end date is determined by the values in the **Contract Term** and **Start Date** fields, if not entered manually. Items with a perpetual license do not have contract end dates. For information about contract term, see Contract Term Calculation.
Contract Days Before Renewal	On edit mode, enter the number of days before the contract's end date when a renewal transaction will be generated. This value applies only to the contract where it is specified. If a value is specified in this field, it overrides the Days Before Renewal preference that sets the target renewal date for existing contracts. You can also update this field through contract mass update. For more information, see Updating Contracts using Mass Update.

Field Name	Description
	If this field is blank, the value in the **Days Before Renewal** field on the Contract Renewals Preferences page is used to determine the target renewal date for the contract. For more information about this preference, see Setting Up Contract Renewals Preferences. This field is disabled when a renewal transaction has been created for the contract.
Contract Type	This field displays the contract type.
Bill To Customer(1)	This field displays the name of the customer who buys the product. This value is set in the **Bill To Customer** field of the sales order from which the contract is created.
End User(1)	This field displays the name of the customer who uses or registers the product. This value is set in the **End User** field of the sales order from which the contract is created.
Distributor	If the contract is created for a multi-tiered sales transaction, this field displays the name of the distributor from which the reseller or end user purchased the product. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Reseller	If the contract is created for a multi-tiered sales transaction, this field displays the name of the reseller from which the end user purchased the product. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Bill To Tier	If the contract is created for a multi-tiered sales transaction, this field displays the channel tier of the customer to be billed. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Ship To Tier	If the contract is created for a multi-tiered sales transaction, this field displays the channel tier of the customer to whom the product will be shipped to. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Currency(1)	This field shows the currency used by the contract. This field is available only if the Multiple Currencies feature is enabled in your account. This value is set in the **Currency** field of the sales order from which the contract is created.
Contract Value (Base Curr)	For accounts that are not OneWorld, this field displays the value of the contract in the currency of the company. For OneWorld accounts, this field displays the value of the contract in the base currency of the customer's subsidiary. For information about contract values, see Contract Value Calculation.
Contract Value (Customer Primary Curr)	This field displays the value of the contract in the primary currency of the customer. For information about contract values, see Contract Value Calculation.
Annual Contract Value (Gross)	This field displays the average annual value of the contract before deducting item discounts. For information about contract values, see Contract Value Calculation.
Annual Contract Value (Net)	This field displays the average annual value of the contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

Field Name	Description
Contract Document	On edit mode, select a document related to the contract or sales transaction from the NetSuite File Cabinet. For more information, see the help topic File Cabinet Overview.
Contract Uplift	On edit mode, enter a percentage uplift for the contract. This value applies only to the contract where it is specified. When the contract is renewed, the price on the renewal contract will be increased by the percentage uplift set in this field. If a value is specified in this field, it overrides the uplift value set on the **Contract** subtab of the customer record. This field accepts positive values from 0 to 100. A contract uplift value set to zero means that you do not want to apply an uplift, even if a value is set on the customer record. You can also update this field through contract mass update. For more information, see Updating Contracts using Mass Update. If this field is blank, the percentage uplift specified on the customer record will be applied on the renewal contract. If there is no uplift specified on the contract and on the customer record, no uplift will be applied on the renewal contract. This field is disabled when a renewal transaction has been created for the contract. **Note:** If a value is specified in the **Contract Item Uplift** field on a contract item, it overrides the uplift value set on the contract or customer record. For more information, see Contract Item Uplift.
Target Renewal Date	This field displays the date when a renewal transaction is automatically generated for the contract. Upon creation of the contract, the value in this field is determined by the value in the **Days Before Renewal** field on the Contract Renewals Preferences page. The default value in the **Days Before Renewal** field is 90 days before the contract's end date. For more information about this preference, see Setting Up Contract Renewals Preferences. If you want to override the Days Before Renewal global preference for a specific contract, edit the contract and specify a value in the **Contract Days Before Renewal** field. Upon saving the contract, the value in the **Target Renewal Date** field is adjusted based on the value in the **Contract Days Before Renewal** field.
Contract Renewed On	This field displays the date when the contract is renewed. This field is blank if the contract is not yet renewed.
Renewal Transaction	This field displays the link to the renewal transaction generated for the contract. This field is blank if the contract is not yet renewed.
Original Contract	This field displays the link to the original contract. On the original contract, this field is blank.
Renewal Terms(1)	This field displays the duration of the renewal contract in months. This value is set in the **Renewal Terms** field of the sales order from which the contract is created. On edit mode, you can update the value of the term for the renewal contract.
Annual Renew Value (Gross)	This field displays the average annual value of the renewal contract prior to deducting item discounts. For information about contract values, see Contract Value Calculation.
Annual Renew Value (Net)	This field displays the average annual value of the renewal contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

Field Name	Description
Renewal Term Renew Value (Gross)	This field displays the average per term value of the renewal contract prior to deducting item discounts. For information about contract values, see Contract Value Calculation.
Renewal Term Renew Value (Net)	This field displays the average per term value of the renewal contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

(1) This field is required if you are creating a contract using CSV import. For more information, see Importing Contracts.

Contract Item Uplift

In Software Vertical Contract Renewals 17.1, a **Contract Item Uplift** field is available on the contract item record.

When a value is set in this field, it overrides the uplift value set in the Contract Uplift field on the contract or the Uplift value set on the **Contract** subtab of the customer record. This field accepts positive values from 0 to 100.

A contract item uplift value set to zero means that you do not want to apply an uplift to the contract item, even if a value is set on the contract or customer record. If this field is blank, the percentage uplift specified on the contract will be applied to the renewal contract. If no uplift value is set on either the contract item or contract, the uplift specified on the customer record will be applied on the renewal contract.

You can specify percentage uplift only to Active contract items of an Active contract.

You can also specify percentage uplift for renewable items on the Item subtab of custom transaction forms. See also Creating a New Contract.

Updating Contracts using Mass Update

You can update specific fields on a contract record through mass update.

The following updates are supported:

- Update the contract level days before renewal setting
- Apply a contract level uplift

To update contract fields using mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **General Updates** to expand.
3. Under Custom Records, click **Contract**.
4. On the **Criteria** subtab, select filters that you want to use to set the criteria for contracts that will be updated.
5. On the **Mass Update Fields** subtab, check the box in the **Apply** column and specify a value in the **Value** or **Formula** field for the contract fields that you want to update. Only the following contract fields are currently supported for mass update:
   - Contract Days Before Renewal

- Contract Uplift

For information about these fields, see Contract Fields.

> **Note:** Although there are other fields shown on the **Mass Update Fields** subtab, only the **Contract Days Before Renewal** and **Contract Uplift** fields are supported and tested for contracts mass update. Do not update other contract fields.

6. Click **Preview** to select which contracts will be included in the update.
7. On the Mass Update Preview Results page, check the box in the **Apply** column for the contracts that you want to include in the update.
8. Click **Perform Update** to execute the mass update.

For more information about mass update, see the help topic Defining a Mass Update.

Renewing a Contract

On the scheduled run of the contract renewals script (R05), renewal transactions are automatically generated for active contracts that have a target renewal date that is earlier than or equal to the current date.

The Software Vertical Contract Renewals SuiteApp also lets you generate renewal transactions for specific contracts on demand. The Renew Now feature enables you to renew contracts without any dependency on the Days Before Renewal and Restrict to Customer preferences. This feature supports single and batch renewals. For more information, see Renew Now and Renew Now: Batch Process.

The generated renewal transaction is based on the value that you set in the Transaction Type to Create field on the Contract Renewals Preferences page. You can set this preference to Opportunity, Quote (Estimate), or Sales Order. If the renewal transaction is a sales order, or when the renewal opportunity or estimate is converted to sales order, a renewal contract with a Pending status is automatically created. For information about Contract Renewals preferences, see Setting Up Contract Renewals Preferences.

After a renewal transaction is generated for the original contract, its status changes from Active to Renewal Generated. The original contract's status changes from Renewal Generated to Renewal Processed when the status of the renewal contract becomes Active (that is, contract items are generated for the renewal contract). For more information about contract states, see Contract Workflow.

Renew Now

You can generate a renewal transaction for specific contracts on demand by clicking the **Renew Now** button on the contract record. This button is available for contracts that satisfy the following conditions:

- Contract is not inactive.
- Contract status is Active or Renewal Rejected.
- Contract has at least one item that is not perpetual.
- Contract has at least one item that is not excluded from renewal.
- Contract has at least one item with an end date that matches the contract end date.

To generate a renewal transaction for a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the **View** link next to the contract that you want to generate a renewal transaction for.
3. Click the **Renew Now** button.

A confirmation message is shown at the top of the contract record to confirm the contract renewal status. If the renewal transaction is successfully generated, the status of the contract changes to Renewal Generated. To view the renewal transaction, click the link in the **Renewal Transaction** field. To view the renewal contract, go to the **Renewal Contracts** subtab of the original contract.

Note: Contract Renewals SuiteApp implements a locking mechanism to prevent contracts from being processed for renewal simultaneously, which may result to duplicate renewal transactions. When a contract is processed for renewal either by Renew Now button or by R05 script, the renewal process locks the contract by setting its Queued for Renewal (hidden field) value to True to prevent the contract from being picked up again for renewal. If an error is encountered while the contract is being renewed, the renewal process sets the Queued for Renewal value back to False so that the contract can be processed again for renewal.

Renew Now: Batch Process

Software Vertical Contract Renewals supports bulk renewal of contracts.

First, you need to create a saved search that defines the contracts to be renewed. The saved search must be Contract type and set to Public. Then, you can select this saved search on the Renew Now: Batch Process page to process the bulk renewal of contracts.

By default, only users with an administrator role have access to the Renew Now: Batch Process page. Administrators can edit the Renew Now: Batch Process script deployment record to give access to other roles who will perform bulk renewals.

To set up the roles for Renew Now: Batch Process:

1. Using an Administrator role, go to Customization > Scripting > Scripts.
2. Click the plus icon on the Filters to expand, and select **Suitelet** in the **Type** field.
3. Look for **SWE R05 Renew Now Batch Process**, and click the **Deployments** link.
4. Click the **Edit** link for **customdeploy_swe_r05_batch_renew_now**.
5. On the **Audience** subtab, select the roles that will perform batch processing of renewals in the **Roles** field. Users with the roles that you selected in this field will have access to the Renew Now: Batch Process page. To select multiple roles, hold down the CTRL key on your keyboard while clicking each role.
6. Click **Save**.

To renew contracts by bulk:

1. Create a contract saved search that defines the list of contracts that you want to renew.
    1. Go to Lists > Search > Saved Search > New.
    2. Select **Contract**.
    3. On the saved search definition page, enter a title for the contract saved search and check the **Public** box.
    4. On the **Criteria** subtab, specify the criteria for the contracts that you want to renew.
    5. On the **Results** subtab, set the **Sort By** field to **ID** and keep the **Descending** box cleared.
    6. Click **Preview** to preview the list of contracts that will be processed for renewal based on the criteria that you specified for this saved search. Review the list of contracts. Click **Return to Criteria** to modify the search criteria or to save the contract search.

7. When you are done setting the criteria for the saved search, click **Save**.

For more information about defining a saved search, see the help topic Defining a Saved Search.

2. Go to Contract Renewals > Renewals Automation > Renew Now: Batch Process.
3. On the Renew Now: Batch Process page, select the contract saved search that you created. The **Saved Search** field shows only Contract type saved searches that are set to Public.
4. Click **Submit**.

   A message appears at the top of the page to confirm the status of the bulk renewal. If your role permits, you can click the link on the confirmation message or go to Customization > Script > Scheduled Script Status to check the status of the renewal script.

   For information about the contracts processed, check the script execution logs.

Editing a Renewal Transaction

On the scheduled run of the contract renewal script (R05), a renewal transaction is automatically generated for a contract when its target renewal date is earlier than or equal to the current date. You can also manually generate a renewal transaction for specific contracts on demand using the Renew Now feature. For information about generating renewal transactions, see Renewing a Contract.

Any contract items from the preceding contract that are set up as renewable are automatically included on the renewal transaction when the transaction it is generated. The term of the renewal transaction is based on the renewal terms set on the preceding contract, and the start date is set to one day after the preceding contract's end date. By default, contract items on the renewal transaction are set up with the same term, start date, and end date as the body of the transaction.

If the renewal transaction is not yet processed by the contract item creation script (R03), you can edit the renewal transaction to modify the contract items that you want to include on the renewal contract.

> **Note:** If the renewal sales order has been processed by the R03 script and contract items have been generated for the renewal contract, any changes to the renewal transaction will not be applied to the renewal contract. If you want to modify the items for the renewal contract, you can create an upsell sales order. For more information, see Contract Upsell.

To edit a renewal transaction:

1. Open the renewal transaction record in edit mode.
   - To open the renewal transaction from the transaction list page:
     - From the Opportunities list page: Go to Transactions > Sales > Create Opportunities > List.
     - From the Estimates list page: Go to Transactions > Sales > Prepare Estimates > List.
     - From the Sales Orders list page: Go to Transactions > Sales > Enter Sales Orders > List.

     Then, click the **Edit** link for the renewal transaction that you want to edit.
   - To open the renewal transaction from the contract record:
     1. Go to Contract Renewals > View Records > Contract.
     2. Click the **View** link for the contract that you want to edit the renewal transaction for.
     3. On the contract record, click the link in the **Renewal Transaction** field to open the renewal transaction.
     4. On the renewal transaction, click the **Edit** button.
2. Go to the **Items** subtab to modify the contract items on the renewal transaction.

> **Important:** Avoid modifying the details (such as the item and quantity) of an existing line item. Doing so creates duplicate contract items when the transaction is processed by the R03 script.
>
> If you want to change an item, remove the line first then add another line for the new item.

- To remove an item, select the line that contains the item that you do not want to renew and click **Remove**.
- To add an item, select the item in a new line.
  - Set the quantity and price level.
  - Specify the item start and end dates. If you did not specify any, the item will be given the same term, start date, and end date as the body of the transaction.

  Click **Add** to add the item. Repeat this step for each item that you want to add.
- If you want to modify the start and end dates for the contract items on the renewal transaction, take note of the following:
  - If you did not check the **Enable Flexible Start Date for Renewal Transactions** preference, you can set start date of the contract items to any date between the renewal contract's start and end dates.
  - If you checked the **Enable Flexible Start Date for Renewal Transactions** preference, you can set up the items on renewal transactions to start earlier than the renewal contract start date. If this preference is enabled, you can set the start date of contract items to any date between the current date and the contract end date.

    This feature is applicable only for renewal transactions and for upsell sales orders for renewal contracts. To set this preference, go to Contract Renewals > Setup > Contract Renewals Preference and check the **Enable Flexible Start Date for Renewal Transactions** box on the **Transactions Validation** subtab. For more information, see Setting Up Contract Renewals Preferences.
  - Items with end dates that are earlier than the contract end date will not be renewed.

3. You can still revert to the original values of all the fields and lines you modified. To do this, click **Reset Lines**, which restores the initial values of all fields and line items when the renewal transaction was generated.
4. Click **Save**.

> **Note:** Unless the renewal transaction is processed by the R03 script, you can still use the Reset Lines button in edit mode, even after a renewal transaction has been modified and saved multiple times.

When the renewal transaction is processed by the R03 script, the items set up on the transaction are added as contract items on the renewal contract. The **Check Log Status** field on the **Options & Log** subtab of the sales order changes from **Pending** to **Processed** when the sales order is successfully processed for contract item creation.

Also, when the contract items have been generated for the renewal contract, the renewal contract's status changes to Active and the preceding contract's status changes to Renewal Processed. For more information, see Contract Workflow.

Rejecting a Renewal Transaction

On the scheduled run of the contract renewal script (R05), a renewal transaction is automatically generated for a contract when its target renewal date is earlier than or equal to the current date. You

can also manually generate a renewal transaction for specific contracts on demand using the Renew Now feature. For information about generating renewal transactions, see Renewing a Contract.

You can reject a renewal transaction if you do not want to process the renewal of a specific contract. When you reject a renewal transaction, the status of the contract changes from Renewal Generated to Renewal Rejected. For information about contract states, see Contract Workflow.

The **Reject Renewal** button is available on a renewal opportunity, estimate (quote), or sales order (in Pending Approval status) when the following conditions are true:

- The preceding contract where the renewal transaction is generated from has a status of Renewal Generated.
- The renewal transaction has no renewal contract yet, or has a renewal contract in Pending status (that is, contract items are not yet created for the renewal contract).

To reject a renewal transaction:

1. Open the renewal transaction record that you want to reject in view or edit mode.
   - From the Opportunities list page: Go to Transactions > Sales > Create Opportunities > List.
   - From the Estimates list page: Go to Transactions > Sales > Prepare Estimates > List.
   - From the Sales Orders list page: Go to Transactions > Sales > Enter Sales Orders > List.
   - From the contract record: Go to Contract Renewals > View Records > Contract. Click the **View** link for the contract that you want to reject the renewal transaction for. On the contract record, click the link in the **Renewal Transaction** field to open the renewal transaction.
2. On the renewal transaction, click the **Reject Renewal** button.
3. On the pop-up window, enter the reason why you are rejecting the renewal transaction in the **Reason** field.
4. Click **OK** to continue with the renewal rejection.

When you reject a renewal transaction, the status of the preceding contract where the renewal transaction is generated from changes to Renewal Rejected. If a renewal contract has been created before the transaction is rejected, the pending renewal contract is canceled (that is, the status of the renewal contract changes from Pending to Canceled).

Rejected renewal contracts will not be processed by the contract renewal script (R05). However, if you want to renew the contract again, you can click the **Renew Now** button on the contract record to generate a new renewal transaction. When you click this button, the status of the contract changes from Renewal Rejected to Renewal Generated. For information about the Renew Now feature, see Renewing a Contract.

Renewal rejected contracts can still be processed for upsell or downsell. You can perform a contract upsell or downsell by clicking the **Create Upsell Order** or **Create Downsell RMA** button on contract edit mode, or by creating a standalone sales order or return authorization. For more information, see Contract Upsell and Contracts and Returns.

For information about contract states and processes, see Contract Workflow and Managing Contracts.

Canceling a Contract

You can cancel a contract if you do not want it to be processed by Contract Renewals scripts.

The **Cancel Contract** button is available on contract records with a status of Pending, Active, or Renewal Rejected. When you click this button, the status of the contract changes to Canceled. For information about contract states, see Contract Workflow.

To cancel a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the View or Edit link next to the contract that you want to cancel.
3. On the contract record, click the **Cancel Contract** button.

Canceled contracts cannot be edited, and will no longer be processed for the following:

- Contract item creation – Canceled contracts are ignored by the R03 script.
- Contract renewal – Canceled contracts are ignored by the R05 script. Also, the Renew Now button is not available on the contract record.
- Contract upsell – Canceled contracts are not available for selection in the Contract field on an upsell order. Also, Create Upsell Order (which is available only on edit mode) will no longer be available on the contract record.
- Contract downsell – Canceled contracts are not available for selection in the Contract field on a downsell RMA. Also, Create Downsell RMA (which is available only on edit mode) will no longer be available on the contract record.

Closing Expired Contracts

When a contract is not renewed or canceled, it remains in active state even if its end date has passed. You can run a script to set the status of expired contracts from Active to Closed. For information about contract states, see Contract Workflow.

To close expired contracts:

1. Go to Customization > Scripting > Scripts.
2. Filter the list to show only Map/Reduce script types.
3. Look for SWV CR MR R08 Close Contracts (customscript_swv_cr_mr_r08_closecontract) and click the **Deployments** link next to it.
4. Click the **Edit** link for customdeploy_swv_cr_mr_r08_closecontract.
5. Make sure that the **Status** is set to **Not Scheduled**, and the **Deployed** box is checked.
6. Click **Save and Execute** in the Save button dropdown menu.

The script searches for contracts with a current status of Active and an end date that is before the current date. Then, it sets the status of these expired contracts to Closed.

Closed contracts cannot be edited and will no longer be processed for the following:

- Contract renewal – Closed contracts are ignored by the R05 script. Also, the Renew Now button is not available on the contract record.
- Contract upsell – Closed contracts are not available for selection in the Contract field on an upsell order. Also, Create Upsell Order (which is available only on edit mode) will no longer be available on the contract record.
- Contract downsell – Closed contracts are not available for selection in the Contract field on a downsell RMA. Also, Create Downsell RMA (which is available only on edit mode) will no longer be available on the contract record.

Contract Upsell

The Software Vertical Contract Renewals SuiteApp is designed to account for additional items that are added to a contract during the contract term.

By creating a sales order and associating it with an existing contract, new contract items are created on the existing contract.

Note: The start and end dates for upsell items must be within the contract's term to be included in the contract. Any items that are sold for a period outside of the existing contract's term should be tracked on a separate, new contract.

Note: If you are creating an upsell sales order for a renewal contract, you can set up the items to start earlier than the renewal contract start date if you checked the **Enable Flexible Start Date for Renewal Transactions** box on the Contract Renewals Preference page. If this preference is enabled, you can set the start date of contract items to any date between the current date and the contract end date. For more information, see Setting Up Contract Renewals Preferences.

You can process an upsell from the contract record or by creating a sales order and associating it with an existing contract. For information about which contracts can be processed for upsell, see Managing Contracts.

Note: Contract items created using CSV import are not supported for upsell.

To process an upsell from the contract record:

1. Open the contract record. For information about viewing a contract record, see Viewing a Contract.
2. On the contract record, click **Edit**.
3. On the **Contract Items** subtab, check the box in the **Process** column and click **OK** for each item that you want to upsell.

   To check the **Process** box for all contract items, click **Mark All**. To clear the **Process** box for all contract items, click **Unmark All**.
4. Click the **Create Up-sell Order** button.
5. On the transaction page, verify that the contract items that you are upselling are properly set on the **Items** subtab.
6. Click **Save**.

To process an upsell by creating a standalone sales order:

1. Create a new sales order. Go to Transactions > Sales > Enter Sales Order.
2. Select the customer you are adding service for in the **End User** field.
3. In the **Contract** field on the **Items** subtab, select the contract where you are adding contract items to. This field is filtered to show only contracts for the selected end user, with the appropriate contract status. For more information, see Managing Contracts.

   Selecting the contract does two things:

   - The end date of the sales order is co-terminated with the end date of the contract you selected.
   - The contract term for the items added reflects this end date.

   By default, the items that you add to the order are given the same term, start date, and end date as the body of the sales order. You can change these start and end dates, but items with end dates that are earlier than the contract end date will not be automatically renewed.
4. Enter or accept the date of the transaction.
5. Select an item you want to add to the contract.
   - Set the quantity and price level.
   - Make any changes to the start and end dates if needed.

6. Click **Add**.
7. Repeat Steps 5 and 6 for each item that you want to add.
8. Click **Save**.

> **Note:** If you added items that affect percentage-based maintenance or support items, you are prompted to verify the maintenance/support line item before saving.

If the Combine Like Items preference is enabled on the Contract Renewals Preferences page, when the contract is renewed, identical items that were added by upsell sales orders are combined with matching items from the original contract if the rates are the same. For information about preference, see Setting Up Contract Renewals Preferences.

When the order is approved and then billed (which is the default setting), the items are added as contract items on the contract.

Contracts and Returns

In the Software Vertical Contract Renewals SuiteApp, removal of contract items is processed through return authorizations (RMAs). You can issue returns for items at any time during a contract's term.

You can process contract item returns from the contract record or from the sales order associated with the contract. For information about which contracts can be processed for downsell, see Managing Contracts.

> **Note:** Validation of the items in the RMA will be performed upon saving only if the Check Log Status field is blank or set to Pending.

> **Note:** Contract items created using CSV import are supported for downsell. If the price level is blank, the custom price level will be used in the RMA.

To process a return from the contract record:

1. Open the contract record. For information about viewing a contract record, see Viewing a Contract.
2. On the contract record, click **Edit**.
3. On the **Contract Items** subtab, check the box in the **Process** column and click **OK** for each item that you want to return.

   To check the **Process** box for all contract items, click **Mark All**. To clear the **Process** box for all contract items, click **Unmark All**
4. Click the **Create Down-sell RMA** button. A progress bar appears while the RMA is being created in the background. When the RMA is created, the page redirects to the RMA record in edit mode, with the contract items for return automatically added on the **Items** subtab.

   > **Note:** If you have contract items with the same name and rate, these items will be combined as a single line item on the RMA created from the contract record. The initial quantity of the item on the RMA will be equal to the combined total quantity of contract items that can be returned.
5. On the **Items** subtab of the return authorization form, set the quantity of the contract items that you want to issue a return for. Also, verify that the other details of the contract items are properly set. For a return to be valid, the items and rates on the return authorization must match the items and rates on the contract.
6. Click **Save**. The page refreshes and reloads the RMA in view mode.

To issue a return from the original sales order:

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. Click the **View** link next to the sales order that contains the contract items that you are returning.
3. On the sales order form, click the **Authorize Return** button. A return authorization opens, with the items and other information from the contract sales order automatically filled in.
   - The end user is selected in the **End User** field.
   - The **Order Type** field is automatically set to **Contract-Downsell**.
   - The contract is selected in the **Contract** field.
   - The contract items are shown on the **Items** subtab.

   The header dates on the RMA match the date and term fields on the sales order.
4. Adjust the items listed on the **Items** subtab to show only the items and quantities you are issuing a return for.
5. Adjust the term, start, and end dates to reflect the portion of the contract term you are issuing the return for.
6. Click **Save**.

When the return is approved, the transaction lines are available for the creation of contract items. The downsell items appear as offsetting items with a negative quantity on the contract and on the Contract Items subtab of the customer record.

When the contract is renewed, downsell contract items are omitted from the renewal transaction.

You can also enter a standalone RMA, but you must make sure that the rates for the lines items on the RMA are the same as the rates on the sales order. To create a standalone RMA, go to Transactions > Customers > Issue Return Authorizations. For more information, see the help topic Entering a Standalone Return Authorization.

Note: For downsell of contract items that use quantity pricing, creating a standalone RMA or manually adding the item to an RMA (regardless of how the RMA is created) may result in validation error.

Example – Renewal Impact of Upsell and Returns

Contract renewal automatically reflects upsell and returns that occur during the original term of the contract. Upsell items that extend to the end of the contract term are renewed, and items that are returned are not renewed.

For example, a software company creates an order for a new contract that includes the following items:

- A twelve-month term product license
- Three-months of on-site professional services training
- 100 seats
- A support entitlement

All of these items are renewable except for the training, which ends after three months. The training is not generated as a contract item.

When the order is approved and fulfilled, a contract is generated that includes all of the order line items (except for the training) as contract items.

Six months into the contract, the company purchases an add-on module. A new order is created and tied to the existing contract. When the existing contract is selected in the Contract field, the term, start and end dates are automatically updated on the transaction.

The new order includes the module as well as a support entitlement for the module.

Items | Billing | Channel | Accounting | Relationships | Shipping | Communication | Related Records | Options & Log | System Information

Contract
50_2014-01-01_2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Advanced Billing	Standard - Straight Line	7/1/2014	12/31/2014			Base Price	1,000		1	6,000.00	6,000.00					6	7/1/2014	12/31/2014
ACME Software: Support - Gold - New	Standard - Straight Line	7/1/2014	12/31/2014			Base Price	280		1	1,680.00	1,680.00					6	7/1/2014	12/31/2014

After the order is approved and billed, the contract is updated with the new contract items.

Nine months into the contract, there is an economic downturn, and the company decides to reduce the number of seats from 100 to 75. A return authorization is entered.

Items | Billing | Channel | Accounting | Relationships | Shipping | Communication | Related Records | Options & Log | System Information

Contract
51-2014-01-01-2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Production Seats	Standard - Straight Line	10/1/2014	12/31/2014			Base Price	100		25	300.00	7,500.00					3	10/1/2014	12/31/2014

The return shows as a negative line on the contract.

When the contract renews, only the renewable items from the original contract and the add-on module that was added mid-term are renewed. The 25 seats that were removed through the RMA are not renewed. Also, the support entitlement from the upsell order is combined with the support item that was included in the original contract.

Contract Renewals Reports and KPIs

The following Contract Renewals reports are available on the Contract Renewals tab:

- Under Metrics and KPIs:
  - Current Licenses | All
  - Current Licenses | Production Users
  - Current Maintenance
  - Customer Retention
  - Customer by Product Retention
  - Customer Maintenance Retention
- Under Channel Reporting:
  - Sales by Channel
  - Sales by Distributor Summary

- Sales by Reseller Summary
- Sales by End User Summary
- Open Sales Orders

The following key performance indicators (KPIs) are available on the Contract Renewals tab under Metrics and KPIs:

- Current Licenses | Production Users | KPI
- Current Maintenance | KPI
- Customer Retention | KPI
- Customer Maintenance Retention | KPI

To set up these KPIs on your dashboard, click Set Up on the Key Performance Indicators portlet. Then, click Add Custom KPIs on the Set Up Key Performance Indicators popup window.

Scripting Contract and Contract Item Records

Use the following tables when scripting the contract or contract item records.

Contract Record

Internal ID: customrecord_contracts

Field Internal ID	FIeld UI Label	Type	List/Record	Tab	Required
custrecord_contracts_start_date	Contract Start Date	Date			Yes
custrecord_contracts_end_date	Contract End Date	Date			Yes
custrecord_swe_contract_type	Contract Type	List/Record	Contract Type		No
custrecord_contracts_bill_to_customer	Bill To Customer	List/Record	Customer		Yes
custrecord_contracts_end user	End User	List/Record	Customer		Yes
custrecord_swe_contract_value	Contract Value (Base Curr)	Currency			Yes
custrecord_swe_contract_value_base	Contract Value (Customer Primary Curr)	Currency			Yes
custrecord_swe_annual_contract_val_gross	Annual Contract Value (Gross)	Currency			No
custrecord_swe_annual_contract_val_net	Annual Contract Value (Net)	Currency			No
custrecord_swe_contract_document	Contract Document	Document			No
custrecord_swe_target_renewal_date	Target Renewal Date	Date			No

Field Internal ID	FIeld UI Label	Type	List/Record	Tab	Required
custrecord_contract_date_renewed	Contract Renewed On	Date			Yes
custrecord_swe_original_contract	Original Contract	List/Record	Contract		No
custrecord_swe_contract_value_olr	Contract Value (OLR)	Currency			No
custrecord_swe_contract_value_clr	Contract Value (CLR)	Currency			No
custrecord_swe_annual_cv_gross_olr	Annual Contract Value - Gross (OLR)	Currency			No
custrecord_swe_annual_cv_gross_clr	Annual Contract Value - Gross (CLR)	Currency			No
custrecord_swe_annual_cv_net_olr	Annual Contract Value - Net (OLR)	Currency			No
custrecord_swe_annual_cv_net_clr	Annual Contract Value - Net (CLR)	Currency			No
custrecord_swe_days_b4_renewal	Days Before Renewal (hidden)	List/Record	Contract Renewal Preferences		No
custrecord_swe_renewals_pricing_model	Renewals License Pricing Model (hidden)	List/Record	Contract Renewal Preferences		No
custrecord_swe_contract_perp_cntrct_itms	Perpetual Contract Items	Multiple Select	Contract Items	Contract Items	No

Contract Item Record

Internal ID: customrecord_contract_item

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_contract_id	Contract ID	List/Record	Contract	Yes
custrecord_ci_process_item	Process	Check Box		Yes
custrecord_ci_quantity	Quantity	Decimal Number		Yes
custrecord_ci_item	Item	List/Record	Item	Yes
custrecord_ci_item_category	Item Category	List/Record	Item Categories	Yes
custrecord_ci_startdate	Contract Item Start Date	Date		Yes
custrecord_ci_enddate	Contract Item End Date	Date		Yes
custrecord_ci_status	Contract Item Status	Free-Form Text		Yes
custrecord_ci_state	Contract Item State	Free-Form Text		Yes
custrecord_ci_bill_to_customer	Bill To Customer	List/Record	Customer	Yes

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_end_user	End User	List/Record	Customer	Yes
custrecord_ci_customer_discount	Bill To Customer Discount	Percent		No
custrecord_ci_product_line	Product Line	List/Record	Product Lines	No
custrecord_ci_quantity_type	Quantity Type	List/Record	Quantity Types	No
custrecord_ci_quantity_cap	Quantity Cap (hidden)	List/Record	Quantity Caps (hidden)	No
custrecord_ci_maximum_quantity	Maximum Quantity (hidden)	Integer Number		No
custrecord_ci_renew_with	Renew With	List/Record	Item	No
custrecord_ci_renewal_processed_on	Renewal Processed On	Date		No
custrecord_ci_historical_install_base	Historical Install Base	Check Box		No
custrecord_ci_original_so_lineno	Original Line No	Integer Number		No
custrecord_ci_term	Contract Item Term	Decimal Number		No
custrecord_ci_order_type	Contract Item Order Type	List/Record	Order Types	No
custrecord_ci_original_transaction	Original Transaction	List/Record	Transaction	No
custrecord_ci_original_list_rate	Original List Rate	Decimal Number		No
custrecord_ci_current_list_rate	Current List Rate	Currency		No
custrecord_ci_original_discount	Original Discount	Percent		Yes
custrecord_ci_vendor	Vendor (hidden)	List/Record	Vendor	No
custrecord_ci_party	Party (hidden)	List/Record	Parties	No
custrecord_ci_ms_type	Maintenance/Support Type	List/Record	Maintenance/Support Types	No
custrecord_ci_ms_percentage	Maintenance/Support %	Percent		No
custrecord_ci_uplift_cap_basis_rate	Uplift Cap Basis Rate (hidden)	Currency		No
custrecord_ci_uplift_cap	Uplift Cap (hidden)	Percent		No
custrecord_ci_license_status	License Status	List/Record	License Statuses	No
custrecord_ci_tran_line_description	Tran Line Description	Long Text		No
custrecord_ci_end_of_life_date	End of Life Date	Date		No

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_end_of_ms_date	End of Mtce/Support Date	Date		No
custrecord_ci_replaced_with	Replaced With	List/Record	Item	No
custrecord_ci_replaced_with_renew_with	Replaced With Renew With	List/Record	Item	No
custrecord_ci_opt_out_ms	Opt-Out M/S	Check Box		No
custrecord_ci_renewals_exclusion	Renewals Exclusion	Check Box		No

Adding Transaction Fields to a Web Service Request for Contract Renewals

Contract Renewals uses some transactions (sales orders, in particular) as the basis for contract creation and renewal. When creating transactions using a web service, you must ensure that the fields being used by the Contract Renewals SuiteApp have a value in the web service request.

The following table lists the fields on a sales order that must be included in the web service request:

Field Internal ID	Field UI Label	Description	Required
Primary Information			
entity	Bill To Customer	Enter the internal id of the customer.	Yes
custbody_end_user	End User	Enter the internal id of the customer.	Yes
custbody_order_type	Transaction Order Type	Enter the transaction order type: ▪ **1** – Contract-New ▪ **2** – Contract-Renewal ▪ **3** – Contract-Upsell ▪ **13** – Contract-Downsell	Yes
custbody_tran_term_in_months	Term	Enter the contract term in months. If a value is not supplied, a default value of 12 will be used.	No
startdate	Start Date	Enter the transaction start date.	Yes
enddate	End Date	Enter the transaction end date. If no value is supplied, the end date will be computed based on the start date and contract term.	No
custbody_renewal_terms	Renewal Terms	Enter the new term of the contract (in months) when it is renewed.	No
Item Subtab			
item	Item	Enter the internal ID of the item to be added in the item sublist.	Yes
quantity	Quantity	Enter the quantity of the items to be added.	No
price	Price	Enter the price level used for the item:	No

Field Internal ID	Field UI Label	Description	Required
		▪ **1** – Use the base price. This is the default value. ▪ **-1** – Use a custom price. If this option is used, you must also set a value for List Rate and Rate. Block Custom Price Level must also be set to 2 (No) to allow custom pricing. ▪ Internal ID of the price level created on the account.	
custcol_list_rate	List Rate	Enter a value for the item list rate.	Yes (if custom price level is used) No (if non-custom price level is used)
custcol_inline_discount	Discount	Specify the discount percentage, if applicable. Enter a value from 0 to 100. Do not append the percent sign (%).	No
rate	Rate	Enter the rate for the item. The value should be equivalent to: [list_rate]*[term]*[discount]	Yes (if custom price level is used) No (if non-custom price level is used)
amount	Amount	This is the computed amount based on the rate and quantity.	No
custcol_swe_contract_item_term_months	Term	Enter the item term in months. By default, this is automatically populated based on the contract term.	No
custcol_swe_contract_start_date	Start Date	Enter the item start date. By default, this is automatically populated based on the transaction start date.	No
custcol_swe_contract_end_date	End Date	Enter the item end date. By default, this is automatically populated based on the transaction end date.	No
Options & Log Subtab			
custbody_block_custom_price_level	Block Custom Price Level	Enter either **1** (Yes) or **2** (No). Yes – This blocks or does NOT allow items whose Item Category is selected or set For Custom Price Block preference (see Setting Up Contract Renewals Preferences) to be included or added to the sales order for web service processing. No – This allows items whose Item Category is selected or set For Custom Price Block preference (see Setting Up Contract Renewals Preferences) to be included or added to the sales order for web service processing.	Yes (if custom price level is used) No (if non-custom price level is used)

Field Internal ID	Field UI Label	Description	Required
custbody_allow_custom_price_lvl_for_ms	Allow Custom Price Level for M/S Items	Enter either **1** (Yes) or **2** (No).	No
custbody_custom_price_is_annual_rate	Custom Price Entered is Annual Rate	Enter either **true** or **false**.	No

Contract Renewals Best Practices

The following are best practices that you can follow to avoid known issues and optimize use of the Contract Renewals SuiteApp.

Customizations Affecting Items

Any customization that restricts item availability should allow the Zero Price Item to be accessible to all transactions.

Issue with Using Make Copy on Customer Records with Contract Items

In accounts with **Make Copy** available under **Actions**, do not use this to create copies of Customer records with Contract Items. Doing so may also create copies of the Contract Items in the duplicate Customer record, which will cause issues. If you want to use Make Copy to create a duplicate of a Customer record with Contract Items, you should remove the Contract Items from the Customer record first. Or, you can avoid using the Make Copy action and create a new Customer record instead.

Transaction and Renewal Limits

SWV Contract Renewals SuiteApp follows the transaction record limits on the number of lines that can be submitted and displayed for transactions. Follow the guidelines in this section to ensure that your contract renewals do not exceed the maximum number of lines or items. For more information, see the help topic Limits for Display of Transaction Lists and Sublists.

These limits were tested for the sales order creation process within the SuiteApp:

- For display of transaction lines – The maximum number of lines that can appear on a transaction record sublist is 10,000 lines.
- For submission of transactions – The maximum number of lines submitted through the user interface is 500 lines. For transactions submitted through CSV import or SOAP web services, the limit is 5,000 lines.

For more information about line limitations in NetSuite, see the help topic Line Limitations for Transactions.

The contract item creation script (R03) can successfully process sales orders (including upsells) with up to 10,000 lines. However, the contract renewal script (R05) can process only up to 5,000 items for renewal. When a contract with more than 5,000 items is processed for renewal, the R05 script will fail and the contract will not be renewed.

The following data has been tested for the SuiteApp. Tests were done using basic processes for sales order creation, contract item creation, and contract renewal, without any customizations.

Items on the sales order (including upsell)	Items on the contract record (processed by R03)	Items on the renewal contract (processed by R05)
800 (combination of license term items and M/S items)	800	800 (excluding non-renewable items)
1,000 license term items	1,000	1,000
1,500 license term items	1,500	1,500
3,000 license term items	3,000	3,000
5,000 license term items	5,000	5,000
5,001 license term items	5,001	No renewal transaction
10,000 license term items	10,000	No renewal transaction

Software Vertical Contract Renewals References

The following sections provide information about how the Software Vertical Contract Renewals SuiteApp calculates values that are reflected on contract records.

- Contract Value Calculation
- Contract Term Calculation

Contract Value Calculation

Contract values are calculated based on the Renewals License Pricing Model that you selected on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

This section shows how contract values are calculated for each pricing model:

- Historical License List Rate - From Tran Line
- Current License List Rate - Price Level on Customer Record
- Current License List Rate - Price Level on Contract
- Current License List Rate - Price Level on Contract with Custom Price Handling

The following variables are used to calculate the contract value:

Variable	Description
annualTerm	Refers to the contract term. A value of 12 is used when the term type is annual, otherwise a value of 1 is used.
ciTerm	Refers to the contract item term. A value of 1 is used when there is no term defined, otherwise the value of the original contract item term is used.
contractRenewalTerms	Refers to the new term of the contract (in months) when it is renewed.
contractLR	Refers to the current item list rate based on the contract price level.

Variable	Description
currentLR	Refers to the current item list rate based on the base price on the item record.
customerLR	Refers to the current item list rate based on the customer price level.
origLR	Refers to the original item list rate from the transaction.
origDC	Refers to the original discount.
qty	Refers to the quantity of the contract items.

Historical License List Rate - From Tran Line

This pricing model calculates the contract value based on the price level and list rate specified on the contract's source transaction.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Formula
Contract Value (Customer Primary Curr)	`origLR * (1-origDC) * qty * ciTerm`
Contract Value (Base Curr)	`origLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	`origLR * qty * annualTerm`
Annual Contract Value (Net)	`origLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	`origLR * qty * 12`
Annual Renewal Value (Net)	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	`origLR * (1-origDC) * qty * contractRenewalTerms`

Note: Even if a renewal item is different from the original item, this pricing model will still use the list rate of the original item in the source transaction.

Current License List Rate - Price Level on Customer Record

This pricing model calculates the contract value based on the price level set on the customer record and its corresponding price specified on the item record. If there is no price level specified on the customer record, the base price on the item record is used to calculate the contract value.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Has a Customer Price Level	Annual Term	Formula
Contract Value (Customer Primary Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * ciTerm`
	Yes	No	`customerLR * (1-origDC) * qty * ciTerm`

Field	Has a Customer Price Level	Annual Term	Formula
	—	—	`customerLR = customerLR /exchangerate` **Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * ciTerm`
	Yes	No	`customerLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	Yes	`(currentLR/12) * qty * annualTerm`
	No	No	`currentLR * qty * annualTerm`
	Yes	Yes	`(customerLR/12) * qty * annualTerm`
	Yes	No	`customerLR * qty * annualTerm`
Annual Contract Value (Net)	No	Yes	`(currentLR/12) * (1-origDC) * qty * annualTerm`
	No	No	`currentLR * (1-origDC) * qty * annualTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * annualTerm`
	Yes	No	`customerLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	—	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Current License List Rate - Price Level on Contract

This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record. If a custom price level is specified on the source transaction (that is, contract price level is blank), the base price on the item record is used to calculate the contract value.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Has a Contract Price Level	Annual Term	Formula
Contract Value (Customer Primary Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`

Field	Has a Contract Price Level	Annual Term	Formula
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	No	`contractLR * (1-origDC) * qty * ciTerm`
	—	—	`contractLR = contractLR /exchangerate` **Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	No	`contractLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	Yes	`(currentLR/12) * qty * annualTerm`
	No	No	`currentLR * qty * annualTerm`
	Yes	No	`contractLR * qty * annualTerm`
Annual Contract Value (Net)	No	Yes	`(currentLR/12) * (1-origDC) * qty * annualTerm`
	No	No	`currentLR * (1-origDC) * qty * annualTerm`
	Yes	No	`contractLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	—	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Current License List Rate - Price Level on Contract with Custom Price Handling

This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record, with the option to set a custom price on the source transaction. If a custom price level is specified on the source transaction (that is, contract price level is blank), the original list rate specified on the source transaction is used to calculate the contract value.

When a custom price is set on the contract and the Renew With item is the same as the original item, the renewal contract uses the custom price for the item on the source transaction. If the Renew With item is different, the renewal contract uses the base price of the renewal item.

For information about the contract value fields on a contract record, see Contract Fields.

Note: The computation is the same for annual or non annual contract terms.

Field	Has a Contract Price Level	Formula
Contract Value (Customer Primary Curr)	No	`origLR * (1-origDC) * qty * ciTerm`
	Yes	`contractLR * (1-origDC) * qty * ciTerm`
	—	`contractLR = contractLR/exchangerate` **Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	`origLR * (1-origDC) * qty * ciTerm`
	Yes	`contractLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	`origLR * qty * annualTerm`
	Yes	`contractLR * qty * annualTerm`
Annual Contract Value (Net)	No	`origLR * (1-origDC) * qty * annualTerm`
	Yes	`contractLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Contract Term Calculation

This section shows how the Software Vertical Contract Renewals SuiteApp calculates the contract term based on the start and end dates that you enter on a sales order. For information about creating a contract, see Creating a New Contract.

The following variables are used to calculate the contract term:

Variable	Description
DD	Day of the month
MM	Month number
YYYY	Year
n	Number of full months between start date and end date, integer component of the contract term
f	Decimal component of the contract term

To show how the SuiteApp calculates the contract term, use the following start and end dates as an example.

Start Date		End Date		Term
14 March 2016	Start Date DD = 14 Start Date MM = 03 Start Date YYYY = 2016	31 December 2017	End Date DD = 31 End Date MM = 12 End Date YYYY = 2017	n + f

The SuiteApp uses the following logic to compute for the integer component (n) and the decimal component (f) of the term.

Steps to Calculate Contract Term	Sample calculation	
Step 1: Get the number of months between the contract's start date and end date (n). This is the integer component of the term.	n = ((End Date YYYY - Start Date YYYY) * 12) - Start Date MM + End Date MM n = ((2017 – 2016) * 12) – 03 + 12 n = 21 months	n = 21
Step 2: Based on the start date, get the date of the last full month before the end date (x). To get x, add the number of months (n) to the start date. 1. If x is later than the end date, subtract 1 month until x becomes earlier than or equal to the end date. 2. If both x and the start date have the same value for DD, subtract 1 day. 3. If x is equal to the end date, then the term is equal to n (from Step 1). Otherwise, continue with Step 3 to calculate the decimal component (f) of the term.	x = Start Date + n x = 14 March 2016 + 21 months x = 14 December 2017 This example falls under condition 2.2, both x and the start date have the same value for DD, which is 14. Therefore, 1 day is subtracted from the initially calculated x value. x = 14 December 2017 – 1 day x = 13 December 2017	x = 13 December 2017
Step 3: Get the date of the start of the month following x (y).	y = x + 1 day y = 13 December 2017 + 1 day y = 14 December 2017	y = 14 December 2017
Step 4: Based on the start date, get the date of the last full month after the end date (z). If both z and the start date have the same value for DD, subtract 1 day.	z = Start Date + n + 1 month z = 14 March 2016 + 21 months + 1 month z = 14 January 2018 For this example, both z and the start date have the same value for DD, which is 14. Therefore, 1 day is subtracted from the initially calculated z value. z = 14 January 2018 – 1 day z = 13 January 2018	z = 13 January 2018
Step 5: Get the number of days between the end date and y, and add 1 day (d1).	d1 = (End Date – y) + 1 day d1 = (31 December 2017 – 14 December 2017) + 1 day d1 = 17 + 1 = 18	d1 = 18
Step 6: Get the number of days between the last full month after the end date (z) and the start of	d2 = (z – y) + 1 day d2 = (13 January 2018 – 14 December 2017) + 1 day	d2 = 31

Steps to Calculate Contract Term	Sample calculation	
the month following the last full month before end date (y), and add 1 day (d2).	d2 = 30 + 1 = 31	
Step 7: Get the decimal component (f) by dividing d1 by d2. Round off to the nearest three decimal places.	f = d1/d2 f = 18/31 = 0.581	f = 0.581
Step 8: Calculate the term by adding the integer component (n, from Step 1) and decimal component (f, from Step 7).	Term = n + f Term = 21 + 0.581 = 21.581	Term = 21.581