



MISYS CLIENT ASSETS

FROM PROPOSAL TO SUPPORT

VERSION 0.2

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1 FULL PROCESS OVERVIEW

1.1 Process Description

<add description>

1.2 Process Diagram

<add diagram / process flow>

2 COMPONENT DEFINITIONS

2.1 Definitions

CLIENT PRODUCT SET

- The main product being sold or supported, under which all components (Client Assets) of the product are grouped.

CLIENT ASSET

- Component-level listing of individual Assets. Client Assets are group by Product Set, and contain the current detail for the Asset.

CONTRACT ASSET

- Transaction-level detail of a client's assets. Transaction amounts are summarized and carried up to the Client Asset.

SYSTEM

- Logical grouping of Contract Assets by Environment (Production, Test, Cold Standby, etc). Assets that require a generated license key must be on a separate System.
- One Environment per System.

SUPPORT ENTITLEMENT

- Joins the Product Set to the System to represent the Product Set in a particular Environment. The status determines the ability for a client to receive support on this instance of the Product Set.

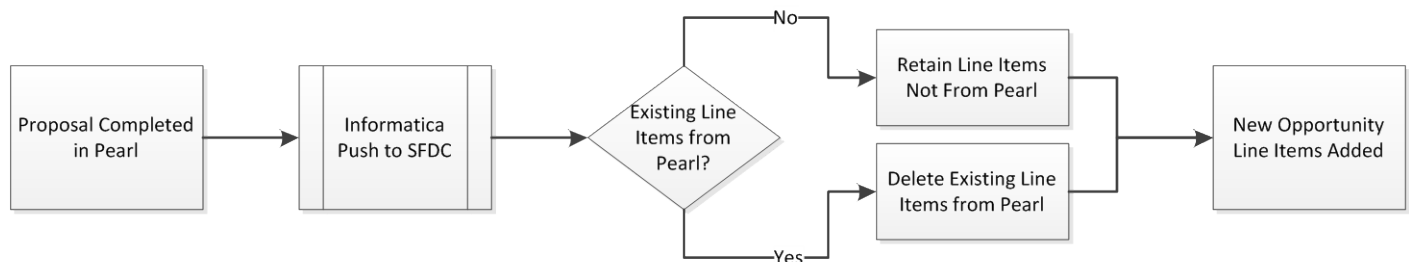
LOCATIONS OF USE

- Indicates the client locations where an Asset can be used.

3 PROCESS STEP DETAIL

3.1 Pearl Proposal Items to SFDC

3.1.1 Process Flow



- Informatica cycles every 5 minutes to check for new items from Pearl to push to SFDC.

3.1.2 Field Mapping for Pearl to SFDC Opportunity

PEARL FIELD	SFDC OPPORTUNITY LINE ITEM FIELD
PricebookEntryId	Pricebook Entry
Currency Code	Currency ISO Code
Product Set	Product Set
Product Family	Product Family
Quantity	Licence Band
Proposed Initial Price	Sales Price
Proposed Initial Price Fair Value	ILF Fair Price
Proposed RLF	Proposed RLF
Proposed RLF Fair Value	RLF Fair Value
Comm Man Price	Comm Man Price
% Disc / Prem	% Discount / Premium
RLF % Disc / Prem	RLF % Discount / Premium
Standard RLF	Standard RLF
Licence Metric Quantity	Licence Metric Quantity
Licence Metric	Licence Metric
Pearl Location	Location

Salesperson + Proposal PPOppLine Concat
Number + Update Time

Pearl Proposal to SFDC OpportunityLineItem field mapping

- The PricebookEntry field pulls in Product fields such as Name.
- The PPOppLine field serves as a unique identifier and indicator that the item was entered by Pearl.

3.2 Sales Contract Creation

<To be updated later>

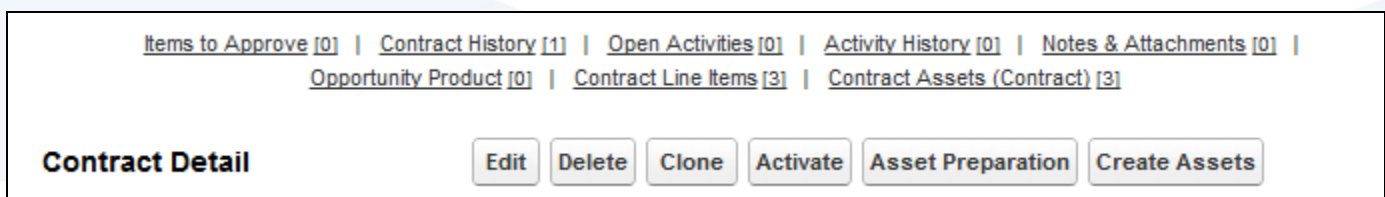
3.3 Asset Preparation

3.3.1 Process Flow



- The Asset Creation step is manual, but several screens have been developed in SFDC to assist in the process of splitting and allocating the assets. See the sample screenshots and field mapping below.
- This step defines the design to use when creating the assets for the client.

3.3.2 SFDC Asset Preparation Process



Contract screen with new Asset Preparation button

[Back To Contract](#)

Opportunity Name	Stage	Close Date	Sales Region	Type	Amount
New Company - Opp	Prospecting	7/11/2012	GMS-Americas	New Customer	USD 25700.0

Opportunity Line Items

Selection	Product Name	Sales Price	Quantity	Misys Product Family	Split	View Split History
<input type="checkbox"/>	Almonde Consulting Engagement FP	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde Consulting Engagement T&M	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde Consulting Project FP	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde Consulting Project T&M	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde Consulting Engagement FP (TCM)	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde Consulting Engagement T&M (TCM)	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde Consulting Project FP (TCM)	USD 100.0	1.00	Almonde	<input type="text"/>	Click Here
<input type="checkbox"/>	Almonde ASP	USD 25000.0	1.00	Almonde	<input type="text"/>	Click Here

[Save & Next](#) [Next Page](#)

Asset Preparation screen

[Review](#)

Contract Line Items

Name	Contract	Opportunity	Opportunity Line Item	Product	Product Set	System	System Environment	Add System
CLI-0158	00000104	New Company - Opp	00kW0000003AKLnIAK	Almonde Consulting Engagement FP	Almonde	- Select System -		Click Here
CLI-0057	00000104	New Company - Opp1	00kW0000003AKMxIAK	Almonde RLF	Mobile	Account Set-up GMS		Click Here
CLI-0052	00000104	New Company - Opp1	00kW0000003AKN2IAK	BankFusion Application Support FP	OPICS Plus Front Off	Account Set-up GMS		Click Here
CLI-0051	00000104	New Company - Opp1	00kW0000003AKMxIAK	Almonde RLF	Mobile	Account Set-up GMS		Click Here
CLI-0063	00000104	New Company - Opp1	00kW0000003AKMvIAK	Almonde RLF (Previously TCM)	Meridian Middleware	Account Set-up GMS		Click Here
CLI-0058	00000104	New Company - Opp1	00kW0000003AKMxIAK	Almonde RLF	Mobile	Account Set-up GMS		Click Here
CLI-0059	00000104	New Company - Opp1	00kW0000003AKMxIAK	Almonde RLF	Mobile	Account Set-up GMS		Click Here
CLI-0055	00000104	New Company - Opp1	00kW0000003AKN3IAK	BankFusion Application Support T&M	Equation DBA	Account Set-up GMS		Click Here
CLI-0078	00000104	New Company - Opp1	00kW0000003AKMxIAK	Almonde RLF	Mobile	Account Set-up GMS		Click Here

Contract Line Item list after splits on Preparation screen

Contract Line Items					
		Save Back			
Name	Contract	Environment	Opportunity	Opportunity Line Item	Product
▼ System:					
▼ Product Set: Almonde					
CLI-0158	00000104		New Company - Opp	00kW0000003AkLnIAK	Almonde Consulting Engagement FP
▶ System: My Test					
▶ System: Almonde Consulting Engagement T&M					
▼ System: Account Set-up GMS					
▼ Product Set: Equation DBA					
CLI-0055	00000104		New Company - Opp1	00kW0000003AkN3IAK	BankFusion Application Support T&M
CLI-0061	00000104		New Company - Opp1	00kW0000003AkN3IAK	BankFusion Application Support T&M
▼ Product Set: Mobile					
CLI-0057	00000104		New Company - Opp1	00kW0000003AkMxIAK	Almonde RLF
CLI-0051	00000104		New Company - Opp1	00kW0000003AkMxIAK	Almonde RLF
CLI-0058	00000104		New Company - Opp1	00kW0000003AkMxIAK	Almonde RLF
CLI-0059	00000104		New Company - Opp1	00kW0000003AkMxIAK	Almonde RLF
CLI-0078	00000104		New Company - Opp1	00kW0000003AkMxIAK	Almonde RLF

Review screen grouped by System and Product Set; Used to review asset allocation prior to creation.

3.3.3 Field Mapping for Contract Line Items

SOURCE OBJECT	SOURCE FIELD	→	TARGET OBJECT	TARGET FIELD
System	Environment	→	Contract Line Item	Environment
OpportunityLineItem	Licence Band	→	Contract Line Item	Licence Band
OpportunityLineItem	Licence Metric	→	Contract Line Item	Licence Metric
OpportunityLineItem	Licence Metric Quantity	→	Contract Line Item	Licence Metric Quantity
Opportunity	Id	→	Contract Line Item	Opportunity Id
OpportunityLineItem	Id	→	Contract Line Item	Opportunity Line Item Id
Product2	Id	→	Contract Line Item	Product
OpportunityLineItem	Product Set	→	Contract Line Item	Product Set
System	Id	→	Contract Line Item	System

3.4 Asset Creation

3.4.1 New Assets

3.4.1.1 Process Flow

3.4.1.2 SFDC Asset Creation Process

3.4.1.3 Field Mapping

SOURCE OBJECT	SOURCE FIELD	→	TARGET OBJECT	TARGET FIELD
Opportunity.Account Id		→	Product Set	Account Id
Account.CCRT Entry	Coral Site Number	→	Product Set	Account CSN
Client Asset	Cold Standby Use	→	Product Set	Cold Standby
Client Asset	DR Use	→	Product Set	Disaster Recovery
Client Asset	Hot Standby Use	→	Product Set	Hot Standby
Client Asset	Product Set	→	Product Set	Product Set Name
Client Asset	Production Use	→	Product Set	Production Use
Opportunity.Account Id		→	System	Account Id
<Naming Convention>	Account Short Name + Site + Licence Set + Environment	→	System	System Name
Opportunity.Account Id		→	Support Entitlement	Account Id
Contract	End Date	→	Support Entitlement	End Date
<Naming Convention>	Account Short Name + Site + 'SE: ' + Product Set + Environment	→	Support Entitlement	Name
Product Set	Id	→	Support Entitlement	Product Set
Contract	Start Date	→	Support Entitlement	Start Date
<Default Value>	Active	→	Support Entitlement	Status
System	Id	→	Support Entitlement	System Id
Manual Entry		→	Support Entitlement	Support Alerts
Manual Entry		→	Support Entitlement	Version
Opportunity.Account Id		→	Client Asset	Account Id
Account.CCRT Entry	Coral Site Number	→	Client Asset	Account CSN
Contract Asset	Environment	→	Client Asset	Cold Standby Use

	(=Cold Standby)			
Contract Asset	Environment (=Disaster Recovery)	→	Client Asset	Disaster Recovery
Contract Asset	Licence Band (from latest contract)	→	Client Asset	Latest Licence Band
Contract Asset	Licence Metric	→	Client Asset	Licence Metric
Contract	Id	→	Client Asset	Last Applicable Contract
Contract	Coral Log Number	→	Client Asset	Last Coral Log Number
Product2	Asset Name	→	Client Asset	Client Asset Name
<Default Value>	MBS Admin login	→	Client Asset	Owner
Product2	Id	→	Client Asset	Product Id
Product2	Product Set	→	Client Asset	Product Set
Contract Asset	Environment (=Production)	→	Client Asset	Production Use
Contract Asset	Rental	→	Client Asset	Rental
Contract Asset	Rental Amount (Sum)	→	Client Asset	Rental Amount
Contract Asset	RLF (Sum)	→	Client Asset	RLF
Contract Asset	Environment (=Test Use)	→	Client Asset	Test Use
Contract Asset	Licence Metric Quantity (Sum)	→	Client Asset	Total Licence Metric Quantity
Contract Asset	Annual Maintenance (Sum)	→	Client Asset	Total Asset RLF/Maintenance
Manual Entry		→	Client Asset	Contract Asset At Risk
Manual Entry		→	Client Asset	Implementation Status
Manual Entry		→	Client Asset	Product Family Group
Manual Entry		→	Client Asset	Summary At Risk Notes
Manual Entry		→	Client Asset	Summary Maintenance Status

3.4.2 Update Current Assets

3.5 Client Support – Log A Case

Appendix

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