



F320 Contracts

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Timing and Agenda

February 22, 2023 - 10-11 AM

Day 1

Part 1: Contract Management Process

Lesson 1: Deployment Contract

February 23, 2023 - 10-11 AM

Day 2

Part 2: Additional Contracts

Lesson 2: Support Contract

Lesson 3: Consulting Contract

Timing and Agenda

February 24, 2023 - 10-11 AM

Day 3

Lesson 4: Retainer Contract

Part 3: Contract Amendments and Corrections

Lesson 5: Contract Upgrade

Lesson 6: Cancellation of the Last Action

Day 1



Part 1: Contract Management Process

Contract Lifecycle

Mandatory stages:

- Setup
- Activation
- Fulfillment
- Expiration

Optional stages:

- Changes to contract services
- Contract Renewal
- Contract Termination

Company Story:

SweetLife Fruits & Jams is a company, which is located in New York City, sells juicers and related equipment to its customers, as well as a variety of services to ensure successful use of these juicers both initially and over time. The company's service staff deploys juicers and performs juicer maintenance under a service agreement. Also, when customers request this service, the company can train customers' employees to operate the juicers.

Thus, a typical deployment contract includes the following options:

- The company deploys equipment for the production of juice, with this deployment delivered as a service. The deployment of equipment includes equipment transportation, unpacking, installation, and equipment commissioning by the company's employees.
- The company provides two additional kinds of support services for juicers:
 - Premium maintenance provided 24x7, with a response time of less than three hours
 - Standard maintenance, with an option of purchasing a fixed number of prepaid hours at a reduced price
- The company trains the customers' employees on the use of the juicers

Deployment Contract Criteria

- The customer must be billed for the training service before the service is provided.
- The customer must be billed in advance for the maintenance services during the whole contract period.
- The contract should span two months, with the possibility of renewal.
- The contract renewal price will be calculated as 15 percent of the deployment fee.
- The customer must be billed monthly for the training course.

Lesson 1: Deployment Contract

Learning Objectives

In this lesson, you will learn how to do the following:

- Performing the needed system configuration tasks
- Enabling the contract management functionality
- Creating non-stock items and contract items to be used in configuring contracts
- Creating contract templates
- Preparing contracts
- Setting up and activating contracts
- Billing contracts
- Renewing contracts

Settings of the Contract Item

Contract Items

CI00000001 - Deployment of juicers

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Contract Item: CI00000001 - Deployment of juicers 🔍

* Description: Deployment of juicers

PRICE OPTIONS

CONTRACT TEMPLATES

ACTIVE CONTRACTS

Maximum Allowed Qua... 3.00

Minimum Allowed Quan... 0.00

Default Quantity: 1.00

Setup Price: 500.000000

Recurring Price: 6,000.000000

Extra Usage Price: 6,000.000000

Renewal Price: 75.000000

SETUP AND RENEWAL

Setup Item: CTDEPLOY - Juicer equipment deploy 🔍 ✎

Setup Pricing: Use Item Price ▾

Item Price/Percent: 100.000000

Retain Rate: 0.00

Deposit

Refundable

Prorate Setup

Renewal Item: CTMAINT - After-sales maintenance 🔍 ✎

Collect Renewal Fee on Activation

Renewal Pricing: Percent of Setup P... ▾

Item Price/Percent: 15.000000

RECURRING BILLING

Billing Type: Prepaid

Recurring Item: CTTRAIN - 5-user Training on operating j 🔍 ✎

Reset Usage on Billing

Recurring Pricing: Use Item Price

Item Price/Percent: 100.000000

Extra Usage Pricing: Use Item Price ▾

Item Price/Percent: 100.000000

Deposit Item: 🔍 ✎

Settings of the Contract Template

Contract Templates

DEPLOYMENT - Deployment of juicers



* Contract Template:	DEPLOYMENT	<input checked="" type="checkbox"/> Active
* Description:	Deployment of juicers	
SUMMARY DETAILS CONTRACTS SLA TERMS ATTRIBUTES		
CONTRACT SETTINGS		
Contract Type:	Renewable	
Duration:	2 Month	
	<input type="checkbox"/> Refundable	
Refund Period:	0 Days	
	<input checked="" type="checkbox"/> Mass Renewal	
Renewal Point:	0 Days Before Expiration	
Grace Period:	10 Days	
	<input checked="" type="checkbox"/> Enable Template Item Override	
	<input type="checkbox"/> Automatically Release AR Documents	
Effective From:		
Discontinue After:		
BILLING SETTINGS		
* Billing Period:	Month	
Bill To:	Customer Account	
Billing Schedule Starts ...	Activation Date	
Billing Format:	Summary	
* Invoice Description:	=@ActionInvoice+' '+[Contract.ContractCD]+' ' 🔍	
* Line Description:	=IIf(@Prefix=NULL, ", @Prefix+: ") + IIf(@Action 🔍	
	<input type="checkbox"/> Enable Overriding Formulas in Contracts	
CASE BILLING SETTINGS		
Case Count Item:		🔍 ✎

Contract Item added to the Contract Template

Contract Templates

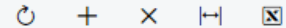
DEPLOYMENT - Deployment of juicers



* Contract Template: Active

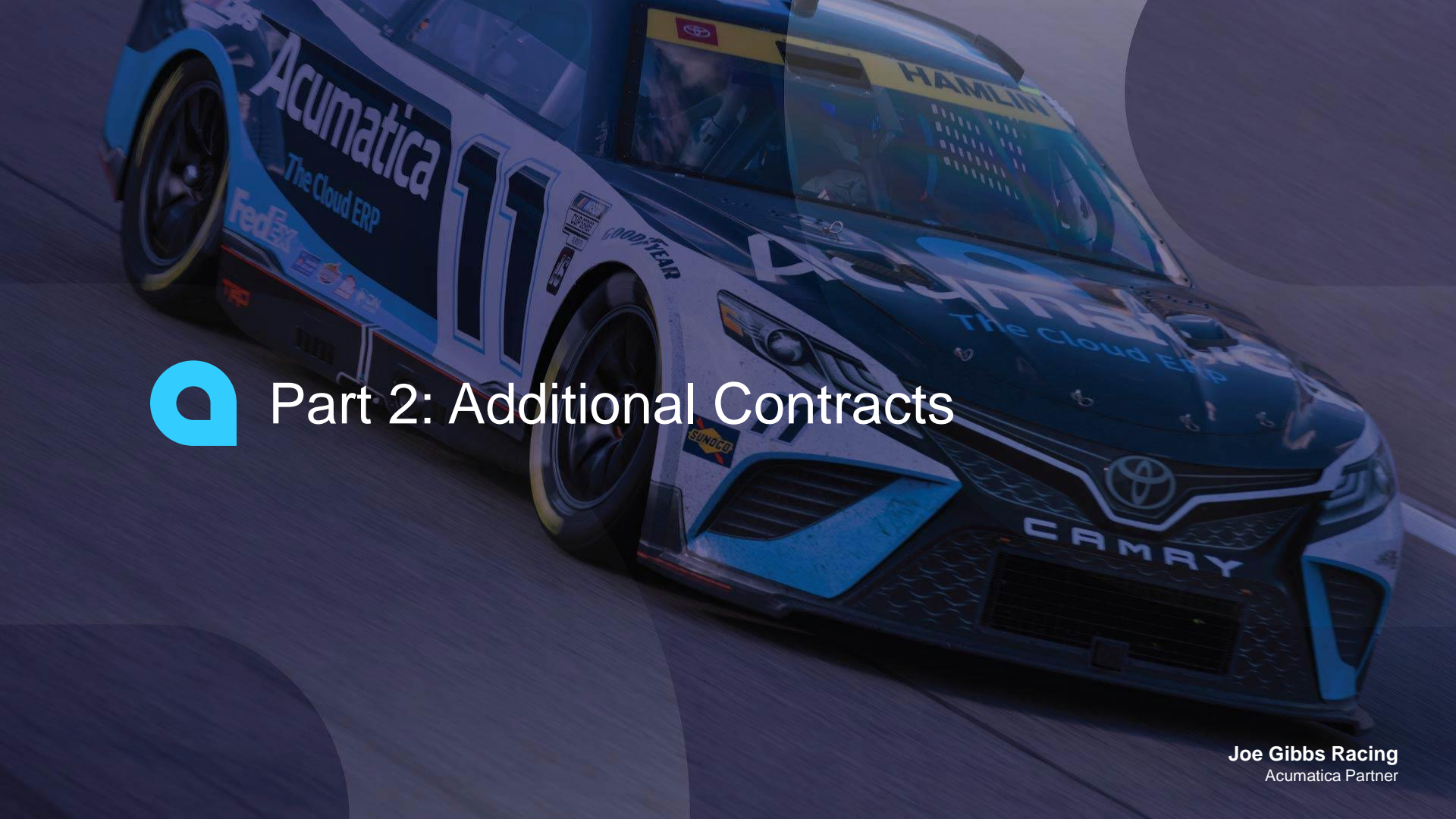
* Description:

SUMMARY **DETAILS** CONTRACTS SLA TERMS ATTRIBUTES



*Item Code	Description	Quantity	Setup Price	Recurring Price	Extra Usage Price	Renewal Price
CI00000001	Deployment of juicers	1.00	500.000000	6,000.000000	6,000.000000	75.000000

Day 2



Part 2: Additional Contracts

Company Story:

After purchasing the juicers, the Unifruit customer now needs a complementary contract for the premium maintenance of juice facilities, which the SweetLife Fruits & Jams provides.

With the premium services, Unifruit will get 24x7 support, with the response time kept under three hours.

Lesson 2: Support Contract

Learning Objectives

In this lesson, you will learn how to do the following:

- Creating an empty contract based on an empty template
- Creating a labor item to be used for billing
- Creating a case class
- Creating and processing customer cases
- Billing a contract for usage

Company Story:

As the SweetLife Fruits & Jams company also specializes in providing consulting services to employees on the proper use of juicers and related equipment, other company the Healthy Drink Alley made a decision to conclude a contract under the terms of which the Healthy Drink Alley will obtain a consulting service.

According terms of the contract, consulting prices will dependent on the skills and position of the consulting specialist, who can be a regular specialist or a senior consultant.

Lesson 3: Consulting Contract

Learning Objectives

In this lesson, you will learn how to do the following:

- Creating labor items to be used for billing
- Creating a case class
- Configuring employee rate overrides for a contract
- Creating contract usage by using time activities
- Billing a contract on demand
- Terminating an unlimited contract

Day 3

Company Story:

Suppose that the Citrus Store customer wants to purchase a fixed number of support hours in advance.

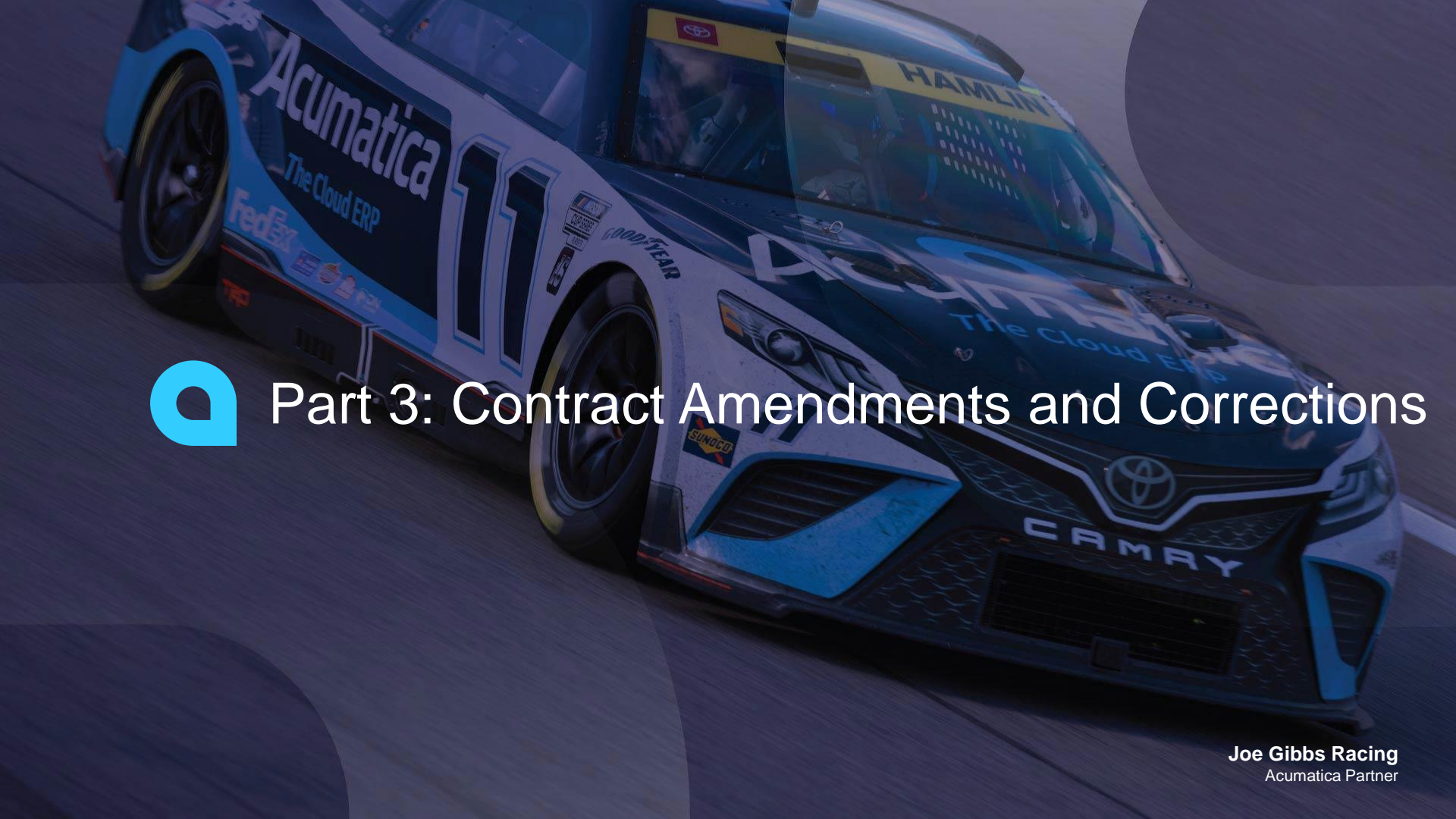
You will learn how to configure a retainer contract, including the creation of the deposit contract item that represents the retainer. You will create a retainer contract that includes 50 prepaid hours of support services at the discounted price of \$100 per hour, with extra usage billed at \$120 per hour

Lesson 4: Retainer Contract

Learning Objectives

In this lesson, you will learn how to do the following:

- Configuring a retainer
- Associating the retainer with a contract item
- Creating and processing a retainer contract
- Manually entering the contract usage



Part 3: Contract Amendments and Corrections

Changes to Contract Services

Two stages of changes to contract:

Preparation and Activation

Changes without using Contract Upgrade:

- Active Contract
- Contract Template
- Contract Item

Lesson 5: Contract Upgrade

Learning Objectives

In this lesson, you will learn how to do the following:

- Preparing a contract upgrade by adding a new contract item to the contract
- Activating the contract upgrade
- Performing contract billing during the preparation stage and after the activation of the upgrade

Lesson 6: Cancellation of the Last Action

Learning Objectives

In this lesson, you will learn how to do the following:

- Canceling the last action on a contract that does not involve a released document
- Canceling an action that involves a released document

Limitations of Cancelling Last Action

- Can only cancel one action at a time
- Cannot cancel action after the release of an AR Invoice that has been issued as a result of that action



Thank you!

Anna Devyatko