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Overview of Oracle Service Contracts

For those who have read the lease management white paper, typical life cycle of contract remains the same ie you Create, QA check, book a contract, bill thru it's life & then renew or terminate a contract. Difference in that now we are talking about services instead of lease. With this basic fact in mind let's take deeper dive & uncover the difference!!!

Oracle Service Contracts provides a complete contract authoring execution solution to manage warranties, extended warranties, usage, subscription services etc from its origination to billing to termination or renewal of contract. With Oracle Service Contracts you can do following for a service only contract or as part of other contracts ie leasing contract.

- Sell multiple types of service
- Define pricing and billing schedules
- Ensure timely service entitlement checks
- Automate renewals for recurring revenue opportunities
- Simplify change management
- Minimize service revenue leakage

Service contract consists of a header & sublines

Header level

is composed of the fields at the top of the Service Contracts Authoring form as well as the Summary tab.

- **Parties:** Information about the customer, including the bill to and ship to
- **Pricing/Billing:** Price list and various accounting rules for pricing and billing contracts. Service Contracts usually retrieves the contractual prices of services or usage from Oracle Advanced Pricing, however, pricing is done manually in some situations.
- **Renewals:** Define the renewal rules applied during manual or automatic renewal of the contract.
- **Administration:** Define administrative components used to process the contract, such as the QA checklist, contract groups, and workflow.
- **Security/Text:** Grant contract access by the resource group or user level.

Line Level

Lines list the individual service, usage, and subscription items included in the contract.

There are three line types:

- **Service lines:** Cover a broad category of items that can include activities such as field service, depot repair, call center, technical support, or any other user-defined business activities.
- **Usage lines:** Charge customers for usage. For example, a photo copier
- **Subscription lines:** Cover subscriptions for both tangible(collateral, or any other physical item shipped thru OM) and intangible items(collateral sent via e-mail)

The Lines tab includes several secondary tabs:

- Accounts
- Effectivities
- Pricing/Products
- Exemption/Payment Options
- Counters
- Events

Sublines Level

Sublines specify what the service covers or the counters where the usage is tracked.

- **Service lines:** Sublines for service lines specify what the service covers. A service line can cover a party, a customer, a site, a system, a product, or an item
- **Usage lines:** Sublines for usage lines specify the counters where the usage is tracked
- **Subscription lines:** Subscription lines do not have sublines.

Creating Service Contract

You can create a contract manually, from a template (which can populate common attributes of contract) OR by copying a contract from contract navigator or launch contract window.

- 1 modify a customer contact record: Choose Maintain Contact
- 2 specify how billed amounts appear on invoices on Pricing/Billing subtab or suspend billing for a
- 3 service contract by deselecting AR Interface check box on Pricing/billing tab. Hold Credits check box to place credit memos on hold.
- 4 To require entry of the purchase order number and prevent the contract from becoming active until the entry is made, then select the Purchase Order Required check box.

Copy to a New/Existing contract

Specify how the contract is to be renewed -> select the Summary tab and the Renewals subtab.

- 1 To automatically renew a contract on expiration: Active Contract from the Type LOV, Specify a date in the Renew Up To field.
- 2 Choose **Electronic Renewal** from the Type LOV, to send renewal email including a hyperlink the customer can use to access your organization's web site and renew the contract. Choose **Notify Sales Rep** from the Type LOV to inform sales rep to renew contract manually. Choose **Submit for Approval** from the Type LOV to submit automatically renewable contract for renewal.
- 3 To specify how the renewed contract will be priced, From the Pricing Method LOV, choose a pricing method from Price List, Manual, Markup Percent

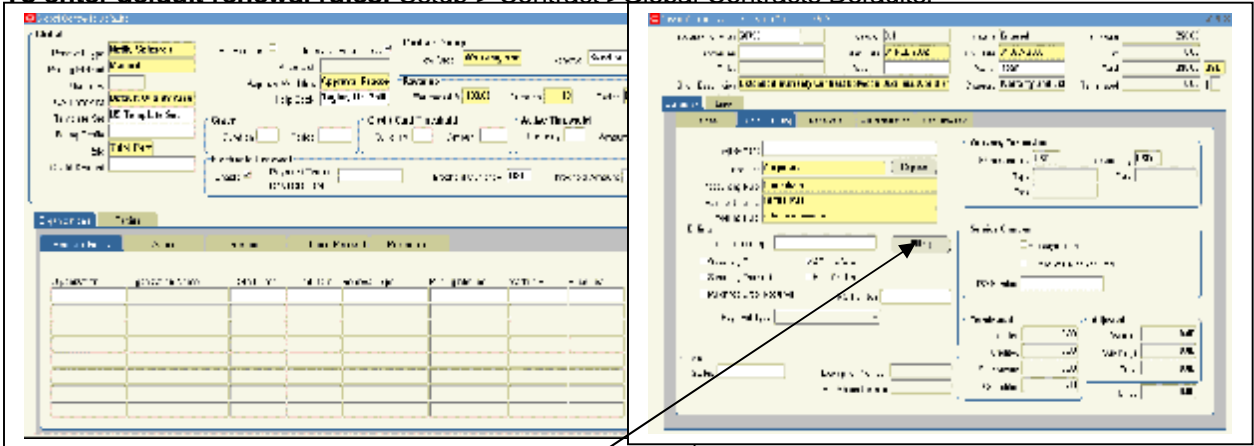
By specifying a grace period you grant the customer the services of a contract beyond the expiration date at no extra charge to the customer, does not experience an interruption of service while a contract is being renegotiated.

To specify and launch the **contract approval workflow** Approval Workflow region, use the Name LOV to select the Oracle Workflow process on administration subtab. To organize contracts by assigning them to **contract groups** In the Contract Groups region, use the Group Name LOV to select each contract group where you wish this contract to appear. Assign **Quality Assurance Checklist** LOV to select the alternate check list on administration subtab if you don't want to use the QA checklist defined on profile OKS: Default QA Checklist to check and validate the contract for errors and completeness before it can become active. Enter **expected revenue** percentage on Estimation region, enter the number representing the percentage of revenue you predict is going to be realized from this contract. Click **Contract Terms** button to specify term for the contract on summary, admin subtab.

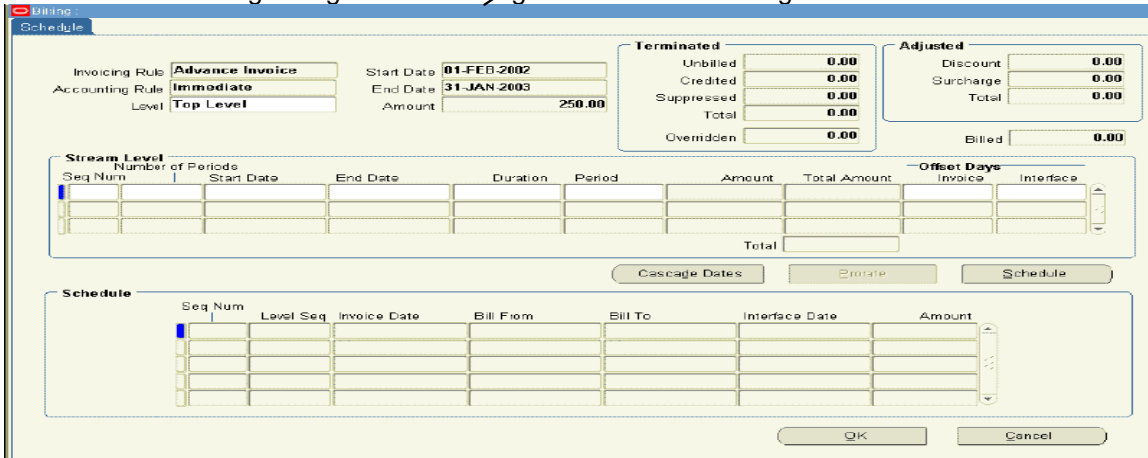
To grant additional access privileges select the Security/Text subtab on the Summary tab. In the Security region use the Type drop-down list to choose one of the following:

- **User**: to grant the right to modify this contract to a user.
- **Group**: to grant the right to modify the contract to a specific sales group.

To enter default renewal rules: Setup > Contract > Global Contracts Defaults.



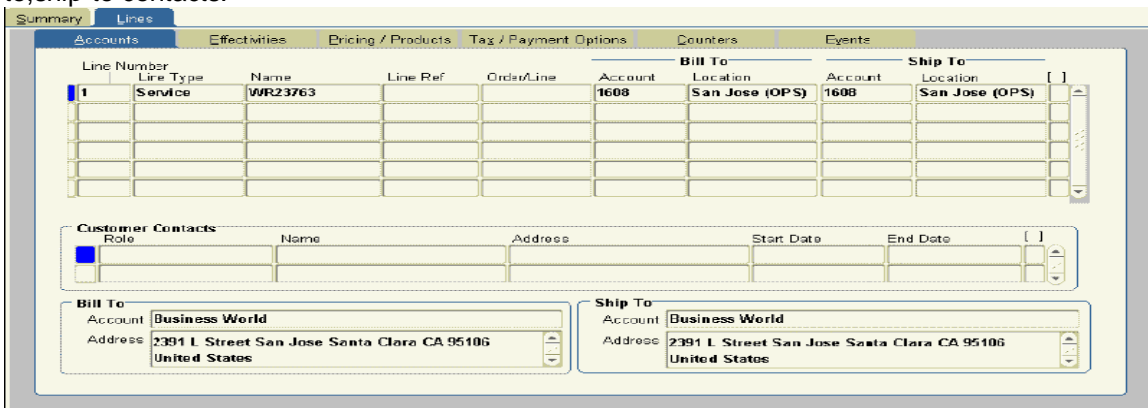
To enter default price list, billing, tax, payment terms, invoicing rules to be defaulted on lines enter information on Pricing/Billing tab. Click billing button to define billing schedule/streams



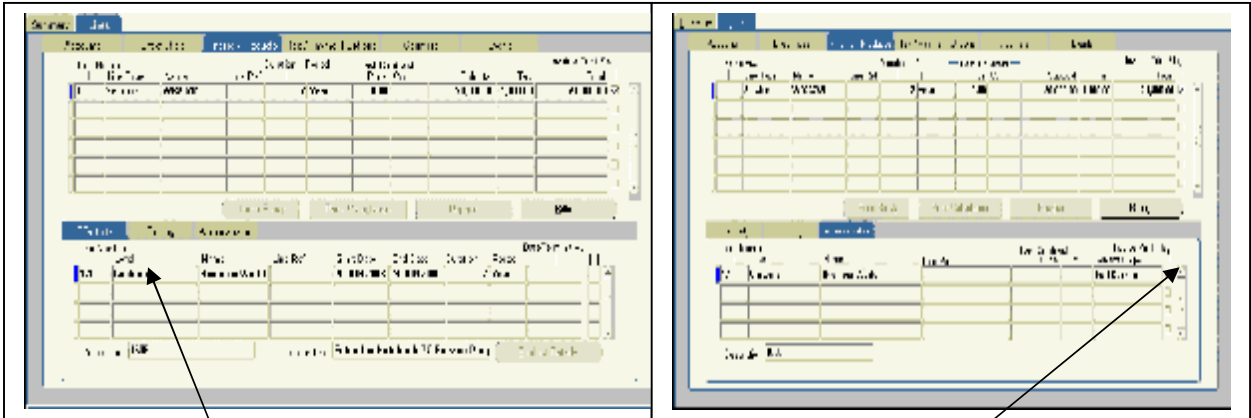
Entering service Lines

Each service (technical support, safety inspections, copier maintenance) is set up by the application administrator as an item in Oracle Inventory and is associated with a coverage template. The coverage template specifies the business processes covered, the times that the customer is entitled to the coverage, amounts covered and applicable discounts, as well as any resources that are to be used and their pricing.

-> Service Contracts Authoring window, select Lines tab to enter contract line info, customer bill-to, ship-to contacts.



Enter duration of service on Effectivities tab. Specify what the service line covers. For each subline, specify one of the covered levels and then enter what is being covered on pricing/products tab.

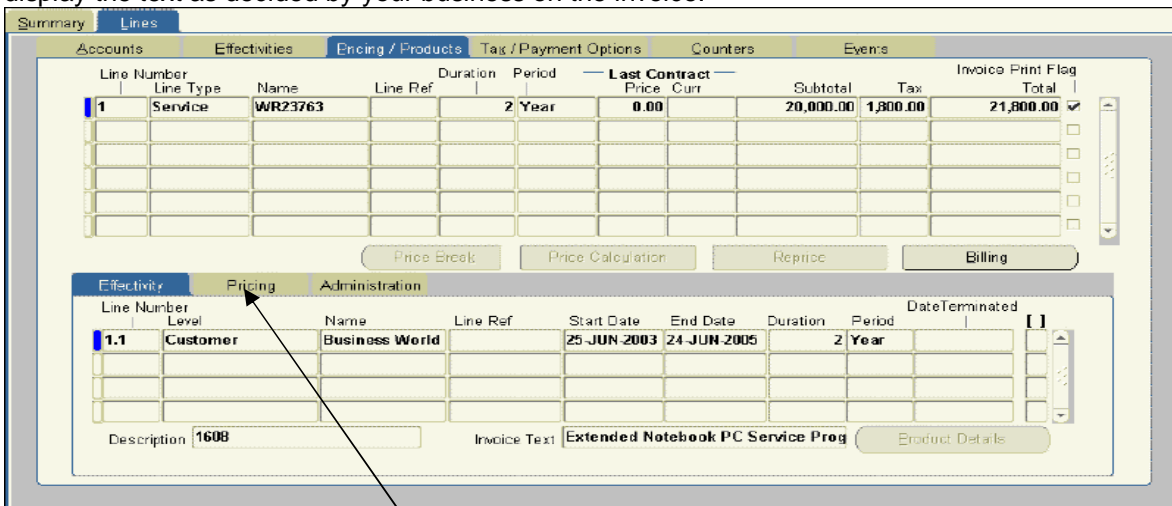


To cover customer products(Instances in Oracle Install Base)

1. From the Service Contracts Authoring window, select the Lines tab and Pricing/Products subtab, Select the service line that will cover the product, Select the Effectivity secondary tab at the bottom of the window. You can also browse & update customer product from Level (LOV)

To cover inventory items:

1. From the Service Contracts Authoring window, select the Lines tab and Pricing/Products subtab. Select the service. Select the Effectivity tab at the bottom of the window. Choose Item for your Level. Use the Name LOV to enter the item name. To prevent a line from being printed on invoice uncheck Invoice Print Flag on Administration subtab, modify the invoice text for the line to display the text as decided by your business on the invoice.



You can re-price the line on Pricing tab in a new price list attached to the line.

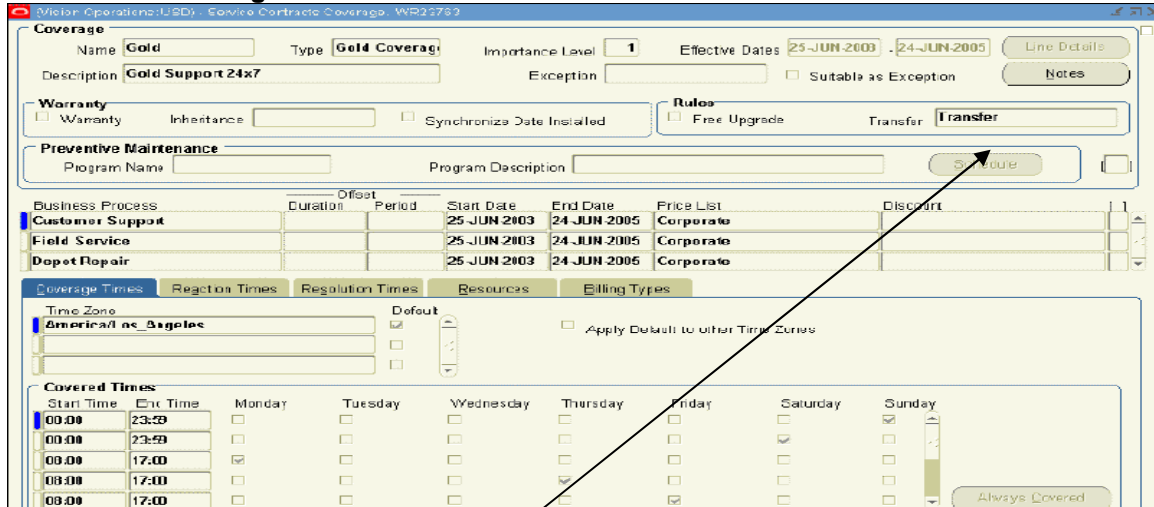
To assign sales credits for a contract line, Choose **Sales Credits** from the Actions menu.

Service Coverage : Each service you select as a contract line item comes with a predefined list of what that service covers including

- Covered business processes
- Pricing and discounts
- Time zones covered, and the days and times coverage is available
- Required reaction and resolution times
- Preferred resources to carry out the work

To modify coverage(schedule preventive maintenance) provided by a service

1. From the Service Contracts Authoring window, select the Lines tab and the Effectivities subtab.
2. Select the service line you wish to modify.
3. Click **Edit Coverage**.



Click on Schedule to provide preventive maintenance details

CoTerminus Contracts To simplify renewals and accounting customers sometimes request all contracts to terminate on the same date, such as the end of the calendar or fiscal year. This date is called the cotermination date.

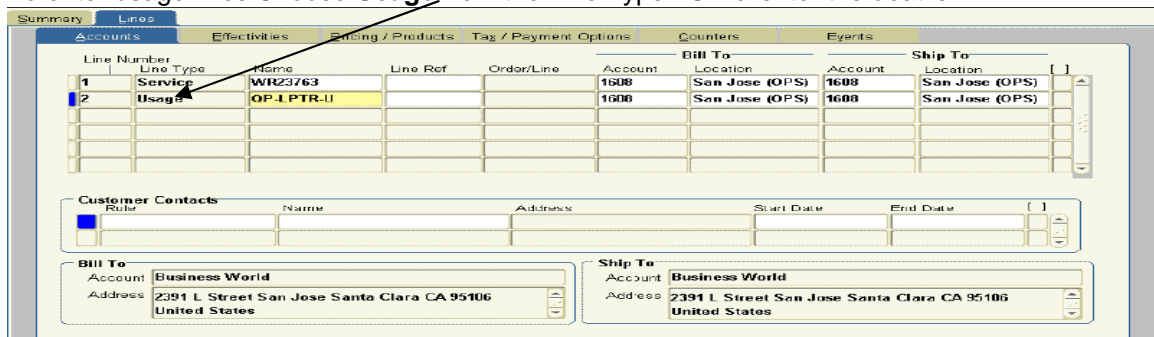
1. From the Service Contracts Authoring window, select the Lines tab and the Effectivities subtab.
2. Select the service line to end on the cotermination date.
3. Click **Cotermiante**.

Usage Lines

The usage item specifies the price list and the price breaks used to charge the customer based on usage of service. For example, XYZ Copier company may create price breaks on the corporate price list that offers customers 100 free copies per month and then charges \$.10 for each copy. Charging \$.03 for the next thousand, and then \$.02 for copies above 2000. as you can see to enable this we will need two things 1 Facility to record how many copies were made in a period(counter), what are the rules for each volume(charges)

Counters : Customer use is recorded in counters devices/mechanism that measure usage such as a counter in a copier, automobile odometers and electric meters, visits to customer, phone calls made, leaflet distributed for marketing a product etc. actual usage is entered into the counters manually either by agents in Oracle Service Contracts, Oracle TeleService, Oracle Field Service, and by customers themselves via a Web portal created with Oracle iSupport or even by IR readers at retail counters

To enter usage lines Choose **Usage** from the Line Type LOV & enter the details



Enter line effectivity & specify how customer is charged in usage type region

Line Number	Line Type	Name	Status	Start Date	End Date	Duration	Period	Qty	UOM	Renewal Type
1	Service	WR23763	Entered	21-AUG-2003	20-AUG-2005	2	Year			Full Duration
2	Usage	QP-LPTR-U	Entered	21-AUG-2003	20-AUG-2007	4	Year			Full Duration

Description: Usage item for laser printers
 Invoice Text: Usage item for laser printers:21-AUG-2003:20
 Price List: Corporate
 Usage Type:
 Fixed Per Period
 Actual by Quantity
 Actual Per Period
 Negotiated Price
 Period: Year
 Average and Settlement:
 Averaging Interval:
 Settlement Interval:
 Termination Method:

On pricing/product tab enter counter name to be used on name field & select counter sub tab to enter counter readings & other details eg UOM, effectivity dates, current etc

Line Number	Name	Reference	Minimum	Fixed	UOM	Fill	Method	Estimation Start Date	Default	Level	Reading	Net Reading
	FS LPTR	Product			EA							

Description: Laser Printer

You can also charge a Fixed fee per period or negotiated price, reported, estimated per period.

You can offer special price breaks at the usage line level, for all the items covered by the usage line, or at the subline level, for individual counters. as explained in the XYZ Copier company example above, by adding price breaks on Pricing/products tab & clicking on 'Price Breaks' & later update it by clicking lock (first time update), update button

Price Break

Locked Method: Point
 Prorate: Break UOM: Year

From	To	Price
1	1000	.05
1001	5000	.04
5001	10000	.03
10001	999998	.02

Update Delete Cancel

Subscription Lines

You can create subscriptions for both tangible and intangible items. Tangible items include magazines, collateral, or any other physical item that can be shipped through Oracle Order Management. Intangible items can be collateral sent via e-mail. Subscription items are setup as inventory item. For tangible items, the inventory item is actually the product in inventory that is being shipped out. For intangible subscriptions, the application administrator must set up a new item in inventory representing the subscription itself.

To enter a subscription line: Choose **Subscription** from the Line Type LOV.

The screenshot shows the 'Lines' window in Oracle Order Management. The 'Line' tab is selected, and the 'Pricing / Products' subtab is active. A single line is visible with the following details:

Line Number	Line Type	Name	Line Ref	Order/Line	Account	Location	Account	Location
1	Subscription	Weekly Vision			1608	San Jose (OPS)	1608	San Jose (OPS)

Below the table, there are sections for 'Customer Contacts', 'Bill To', and 'Ship To'. The 'Bill To' and 'Ship To' information is as follows:

Account	Address
Business World	2391 L Street San Jose Santa Clara CA 95106 United States

Enter effectivity & define schedule as follows

1. Select the Line tab and the Pricing/Products subtab.
2. Select the subscription line to set up.
3. Click **Edit Schedule**.

The screenshot shows the 'Weekly Vision' window. The 'Subscription Template' section contains the following details:

Name	Weekly Vision	Description	Weekly Vision Subscription
Subscription Type	Magazines	Media Type	Document
Fulfillment Channel	Order Management	Frequency	Weekly
Comments	Weekly Vision Subscription		

The 'Schedule Pattern' section shows:

Start Date	07-JUL-2003	End Date	06-JUL-2004	Offset Days	-6
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The 'Interface Schedule' table is as follows:

Start Date	End Date	Interface Date	Qty	UOM	Order Number	Order Status
13-JUL-2003	19-JUL-2003	07-JUL-2003	1	Each		
20-JUL-2003	26-JUL-2003	14-JUL-2003	1	Each		
27-JUL-2003	02-AUG-2003	21-JUL-2003	1	Each		
03-AUG-2003	09-AUG-2003	28-JUL-2003	1	Each		
10-AUG-2003	16-AUG-2003	04-AUG-2003	1	Each		
17-AUG-2003	23-AUG-2003	11-AUG-2003	1	Each		

Total Quantity: 52

To view the pricing details:

1. Select the Line tab and the Pricing/Products subtab, Select the subscription line to view.
3. Click **Price Calculation**.

You can reprice the line by by changing price list on effectivities window & then clicking Repricing button on Pricing/Products subtab,you can also view shipment details of service on this window by clicking on record indicator on schedule line.

To create a billing schedule for an individual subscription line,select the Line tab and the Pricing/Products subtab then click on billing to enter billing schedule.

The screenshot shows the Oracle Billing interface for a subscription line. It includes fields for Invoicing Rule (Advance Invoice), Accounting Rule (Immediate), Level (Equal Amount), Start Date (07-JUL-2003), End Date (06-JUL-2004), and Amount (120.00). Summary boxes show Terminated (Unbilled, Credited, Suppressed, Total, Overridden) and Adjusted (Discount, Surcharge, Total) amounts, all at 0.00. A Stream Level table shows a single period from 07-JUL-2003 to 06-JUL-2004 with a duration of 1 month and an amount of 10.00. A Schedule table lists five invoice dates from 19-MAY-2005 to 19-MAY-2005, each with an amount of 10.00.

Seq Num	Level Seq	Invoice Date	Bill From	Bill To	Interface Date	Amount
1	1	19-MAY-2005	07-JUL-2003	06-ALG-2003	07-JUL-2003	10.00
1	2	19-MAY-2005	07-AUG-2003	06-SEP-2003	07-AUG-2003	10.00
1	3	19-MAY-2005	07-SEP-2003	06-OCT-2003	07-SEP-2003	10.00
1	4	19-MAY-2005	07-OCT-2003	06-NOV-2003	07-OCT-2003	10.00
1	5	19-MAY-2005	07-NOV-2003	06-DEC-2003	07-NOV-2003	10.00

Ordering Service in Order Management

Order service using Oracle Order Management and have the application create the appropriate contracts automatically. By setting profile OKS: Category for Order Management Originated Contracts, which determines the contract category for Order Management originated contracts. Each service line must refer to either an item already in a customer’s installed base or an item in an order. By default, the application automatically creates a single contract for all the service lines in your order. You can add renewal and contact information for the new contract. The application generates a new contract from the service lines in your order when order is booked, picked, and shipped.

To generate sales contract from Orader Run the Service Contracts Order Capture Integration, and Workflow Background Process concurrent programs. You can search contracts by sales order number in Oracle Service Contracts on contract navigator window and also on install base by querying by orader number.

Setting up new contract defaults for Oracle Order Management

1. Navigate to Setup > Contract > Global Contracts Defaults.

The Global Contracts Default window appears. You can use Contract Group LOV to enter the contract group, the QA Checklist LOV to choose the checklist, Approval Workflow LOV to choose the Oracle Workflow process, Help Desk LOV to choose the return e-mail address for electronic Renewals, Credit Amount LOV to choose what credit a customer receives if service is terminated

Adjusting Price on Sales Order

Choose Pricing Adjustment from the Tools menu & enter/reprice adjustments

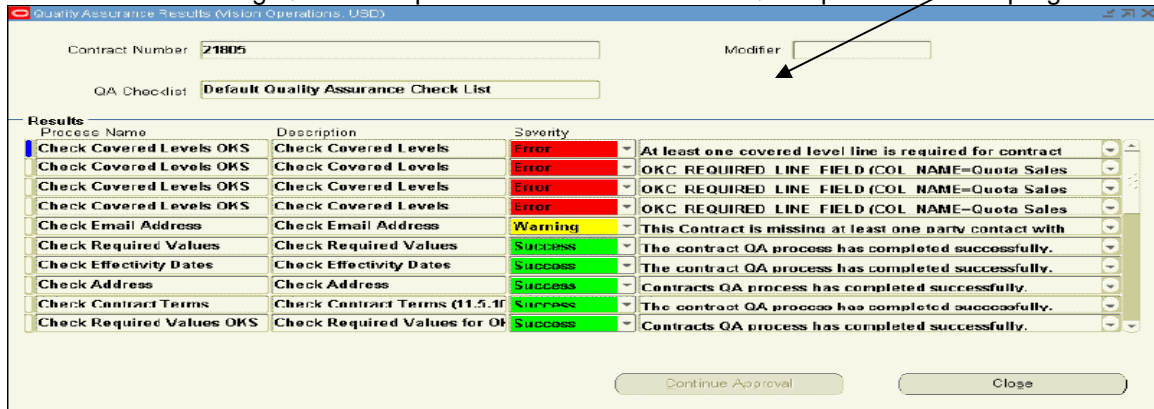
The screenshot shows the Oracle Adjustments window. Line details include Line Number 1, Start Date 01-MAR-2001, End Date 28-FEB-2002, and Amount 400.00. The line name is WR23763 Extended Notebook PC Service Program. The Adjustments table is currently empty.

Level	Modifier Number	Modifier Type	List Line	Rate	Amount Red	New Price	Lumpsum	Exter

You can also apply pricing qualifier to let application calculate pricing based on qualifiers setup for the customer using Pricing Qualifier from the Tools menu.

Quality Assurance Checking Service Contract

QA Check is an automated process that verifies the validity of a contract which can be customized to meet the business needs. QA checklist can be launched manually, from Actions menu or by submitting a contract for approval or from summary administration tab for single contracts. For running QA for multiple contracts run Contracts QA Report concurrent program.



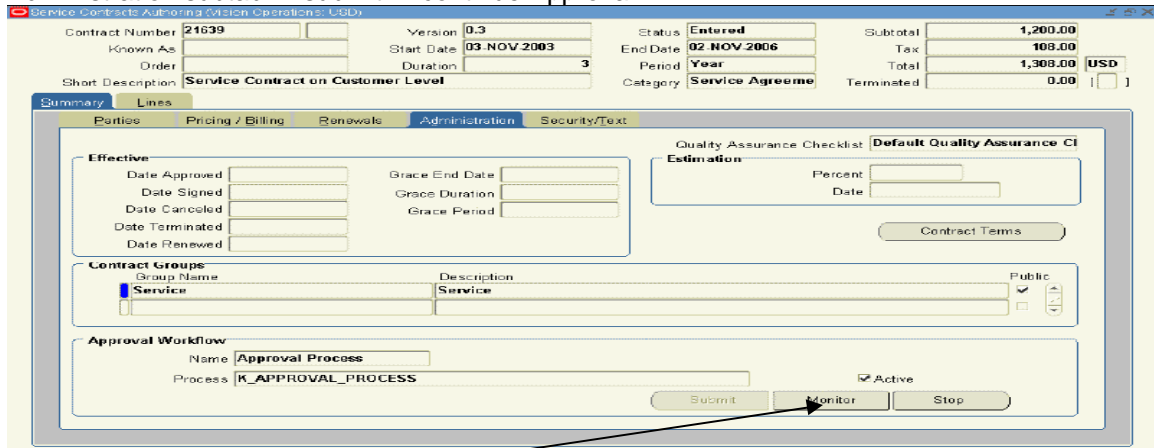
Approving & Signing Service Contract

Oracle Service Contracts leverages Oracle Workflow to automate the contract approval process. After you author a contract you must:

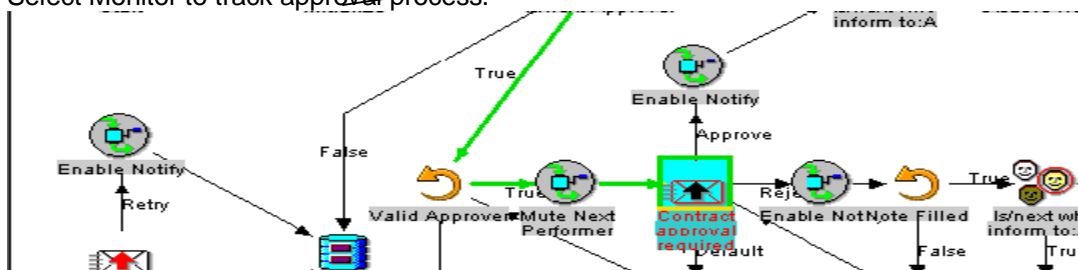
- Submit the contract for approval.
- Secure approval on the contract.
- Obtain a signature on the contract.

Submit contracts for approval:

1. From the Service Contracts Authoring window, select the Summary tab and the Administration subtab -> submit -> continue Approval



Select Monitor to track approval process.



-> Approve & Sign contract on Contract launchpad by opening inbox & selecting Notification type 'Contract Approvals' & 'Contract requiring signature' & then responding to notification.

Billing Service Contracts

A billing schedule determines when the customer is billed for the services they receive as per the billing schedule defined at contract header, contract line, or subline level or created on order.

Three billing level can be defined for the billing schedule(not available for each line type)

Equal Amount: allows you to bill for equal amounts over the billing period and have control over the amount to be billed as well as the billing periods.

Top Level: allows you to define the billing periods. The billing engine calculates the bill amounts.

Covered Level: when the covered level effective dates are not the same as the service line effective dates, you have the option to create a covered level specific billing schedule.

You can set up multiple, ad hoc billing profiles in Oracle Service Contracts. Billing profiles include information about accounting and invoicing rules, type of billing, and its frequency. Invoices are generated according to the billing profile attributes. The billing engine accesses the billing profile and bills accordingly to create billing profile

Choose Service Contracts Manager > Setup > Contract > Billing Profile

If you want you can distribute revenue for a contract line to one or more general ledger accounts other than the default account specified by selecting Revenue Distribution on tools menu, then Complete billing process by running following concurrent programs.

- Service Contracts Main Billing
- AutoInvoice Import Program
- Service Contracts Fetch Receivables Info for Billing
 - è Run Service contract usage averaging program to distribute consumption evenly in multiple billing periods to distribute higher usage in a period. After distributing the consumptions evenly, price breaks are applied to these consumptions to get new billing amount for the period.
 - è Run service contracts usage settlement program to settle the discrepancies between actual consumption and actual billed amount.

View Invoice details from tools menu on Service Contracts authoring window.

Seq Num	Number	Date	Class	Source	Transaction Type	Amount
1	613	17-MAR-2005	Invoice	Service	Regular Invoice	420
2	742	14-APR-2005	Credit Memo	Service	Termination Credi	-246.72

- è Use the History tab of the Billing window to review billing history.
- è Review invoice using standard AR functionality (Print using Bill presentment architecture)

Managing Contract lifecycle

1 Modifying Multiple contracts as same time(Mass change)

You can change following attributes on multiple contracts with a single request using mass change functionality controlled thru OKS: Mass Change Security Level profile option

- Accounting Rule
- Contract End Date
- Contract Start Date
- Coverage Start Time
- Header Bill to Address
- Party Billing Contact
- PO Numbering for Billing
- Product Line Ref
- Revenue Account
- Agreement
- Contract Group
- Contract Renewal Type
- Coverage Timezone
- Header Ship to Address
- Party Shipping Contact
- PO Required for Renewal
- Reaction Time
- Salesperson
- Business Process Price List
- Contract Line Ref
- Coverage End Time
- Coverage Type
- Invoicing Rules
- Payment Term
- Price List
- Resolution Time
- Summary Print

Navigate to Mass Change from the Navigator select contract to change QA check & specify when you want mass change to take effect.

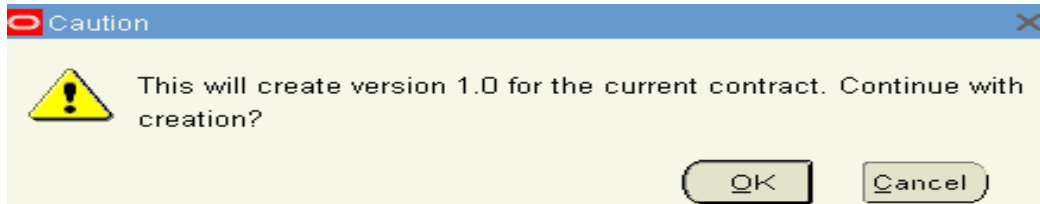
2 Create Change Request by right clicking on contract in contract navigator

Party	Role	Date Accepted
Business World	Customer	29-APR-2005
Vision Operations	Vendor	29-APR-2005

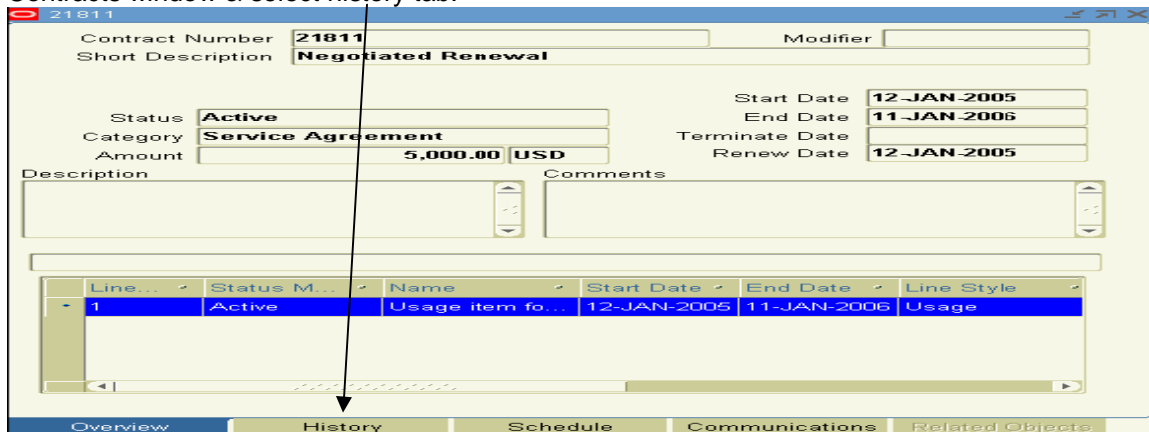
Review & approve Change request on Launchpad (inbox) by selecting notification type 'Change request approval' & responding to workflow.

3 To update contracts online select the Summary tab on contract authoring window and select Open for Update,make changes to contract run QA check from tools menu & proceed with approval as explained earlier.

4 Creating different version of contract : Open contract on contract authoring window,choose the Tools menu and select **Create New Version**



5 View contract history by double clicking on contract on Contract Navigator tab of the Oracle Contracts window & select history tab.



6 To change a contract status: right click a contract on contract navigator window and choose Change Status ,specify new status,reason for change & any comments for status change.

** Two concurrent programs used to automatically change the status of a contract:

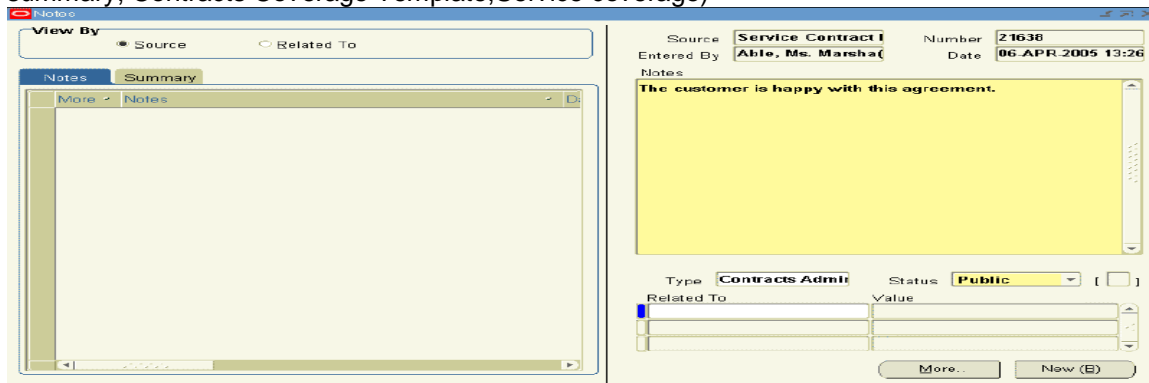
- Contract Status Change by Range
- Contract Status Change by Contract

These programs are used when the status transitions are not manual eg

- expires when an end date is reached.
- becomes active from the signed status at the start date.

Adding Notes to Contract

Use notes to communicate with other contract administrators, service agents, and sales representatives regarding the details of a contract or maintain a diary note about contracts which are shared amongst any user who can query the contract & thus serves the purpose of communicating any information related to that contract.By selecting tools -> Notes (at contract summary, Contracts Coverage Template,Service coverage)



Extending & renewing contracts

Duration of a contract or a contract line can be **extended** without having to submit the contract to the approval workflow. Contract must be in a status of Active, Signed, or Expired to be extended. Contract lines are automatically extended, as long as the end date of the line is the same as the end date of the contract.

Contract Navigator, highlight a contract and right mouse click & select extend

To reprice extended contract go to Summary tab and Parties subtab, select **Open for Update**, navigate to the Lines tab and Pricing/Products subtab & **'Reprice'**

** You can also extend a contract line by selecting the line you wish to extend & then right mouse click & select extend line

Extend Contracts (Vision Operations: USD)

End Date: 02-NOV-2004
 Duration: 2
 Perpetual

New End Date:
 Period: Year

Extend Cancel

Renewing a contract involves making a copy of an existing, active contract at a point in time. The dates are changed to reflect a period of time similar to the existing contract; beginning on the first day after the existing contract expires. Other attributes of the new contract may also be changed such as pricing. Contracts can be renewed either manually (on Contract Navigator) or automatically (running concurrent programs) based on renewal rules that apply to both the manual renewals and the automatic renewals

To renew contracts manually: Highlight an active contract on contract navigator, Right mouse click to select Renew.

Renew Contracts (Vision Operations: USD)

New Number: 21279
 New Start Date: 21-JUL-2008
 Duration: 1
 Perpetual
 Submit Request

New Modifier: R15-APR-05 08:59
 New End Date: 20-JUL-2009
 Period: Year

Renew Cancel

To consolidate multiple contracts for renewals: select a target contract, right mouse click to select Renewal Consolidation, Query Source, select lines & submit for renewal

Renewal Consolidation

Contract Num: 21279
 Category: Service Agreement
 Start Date: 21-JUL-2008
 End Date: 20-JUL-2009
 Description: Service Contract for Bt
 Amount: 5000
 Modifier: R15-APR-05 08:59:13
 Status: Entered

Renewal Rules
 Renewal Type: Notify Salesrep
 Pricing Method: Manual
 Price List:
 Markup%:
 PO Number:
 PO Required:
 Revenue Estimation %: 100
 Estimation Duration: 30
 Period: Day

Query Source

Source Contracts

*** = Selected ### = Processed ??? = Error

Select Line Deselect Line Submit Save Cancel

Send quote letters by e-mail

On Service Contracts Authoring window, choose the Tools menu and select Email Quote, type your message, attach documents & send quote. This will send quote as per XML template defined using XML publisher.

Email Quote

Addresses

From:

To:

Cc:

Reply-To:

Message

Subject:

Text:

Attachment

Report Name:

Type:

Terminating service Contracts

Terminate a contract, a contract line, or a contract subline provided termination date falls between the start and end date of the service or services being terminated (early termination). During the termination process a credit amount is calculated which can be processed as follows.

- override the credit
- provide a full credit
- suppress the credit

To terminate a contract: Highlight the contract you wish to terminate on Contract Navigator, Tools menu, select **Terminate** provide date & reason for early termination & click review to see & decide what you wish to do with credit amount (as indicated above). Indicate your decision by clicking Full Credit, Suppress credit check boxes & then terminate the contract.

Terminate Contracts (Vision Operations: USD)

Date:

Reason:

Description:

Amount:

Override Amount:

Full Credit Suppress Credit

To terminate a line on Overview tab, highlight the contract line you wish to terminate (optionally select multiple lines if needed). Right click the mouse, and select **Terminate Line** to terminate the line using process similar to the one outlined above

To terminate a subline, on Service Contracts Authoring window, select the Line tab, Pricing/Products subtab, and the Effectivity secondary tab, then choose the subline to terminate, using process similar to the one outlined above

Frequently used Reports

- 1 Contracts QA Report** allows you to run a QA check on multiple contracts.
- 2 OKS Products Not Renewed Report** helps the sales representative identify customer products that have extended warranties in an Expired or Terminated status.
- 3 Service Contracts Bookings Report** lists the value of all service agreements, warranties and extended warranties, in an Active, Approved, or Signed status with a valid customer or vendor role specified
- 4 Service Contracts by Status Report** allows sales reps to track contracts by status.
- 5 Service Contracts Detail Report** displays key details of the contract headers, contract lines, and covered products for contracts in the warranty and extended warranty categories.
- 6 Service Contract Forecast Management Report** allows the sales representative and management to track the anticipated close of contract renewals.
- 7 Service Contracts Forecast Summary Report** lists the contracts eligible for renewal for a given period as well as the recognized revenue date.
- 8 Service Contracts Setup Report** is a diagnostic tool that facilitates debugging of implementation issues.
- 9 Service Contracts Summary Report** allows the sales representative to track all contracts by customer.
- 10 Generate Quote** integrates with XML Publisher, to generate a PDF file using the quote template that specified in the parameters.

