

Maximo 7 Training Guide

Service Provider

MAXIMO™ 7 Training Curriculum

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CHAPTER 1 - SERVICE PROVIDER OVERVIEW

THE MAXIMO SERVICE PROVIDER APPLICATION



INTRODUCTION TO THE MAXIMO SERVICE PROVIDER

IBM Maximo for Service Providers (or Maximo for Service Providers) meets the needs of clients who manage assets and services for their customers as a business or clients who manage assets and services within an enterprise and charge internally for these services.

Maximo for Service Providers supports the business model of an outsourcer that manages the assets of its customers (Customers can be external or divisions within an enterprise) and provides maintenance services for those assets. Using Maximo for Service Providers the Service Provider can manage customer agreements. These agreements specify the services that are provided to each customer, the price charged for managing these assets, and for the individual maintenance activities performed for the customer. As maintenance activities are recorded, prices are calculated based on the pricing rules of the customer agreement. At the end of the billing period, the Service Provider collects all of the billing transactions. The charges include charges that were calculated for discrete maintenance activities, charges for asset management based on the number and type of assets under management or the usage of assets, and any retainer fees and miscellaneous fees. The charges are placed in a batch for review. The individual transactions can be adjusted at this point. At the completion of the review process, Maximo for Service Providers sends the transactions to the Service Provider's accounting system.

The key benefits that Maximo for Service Providers offers are:

Reduction of overhead costs:





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- Improve efficiency of operations
- o Replace redundant, repetitive tasks with automated response plans
- Add new customers easily without the additional overhead of installing another application instance
- Increased revenue through accurate pricing
- Key performance indicator (KPI) reporting on service management
- Improved cash flow by providing timely and accurate billing
- Customer pre-approval of the billing of completed work
- Easy to configure and upgrade from release-to-release:
 - Configure the user interface (UI), workflows, reports, KPIs, and dashboards dynamically
 - Create new applications with drag-and-drop actions through built-in configuration tools
 - Make changes through the built-in configuration tools upgrade
 - Use the web interface immediately after upgrade

MAXIMO SERVICE PROVIDER APPLICATIONS

1.2.1 CUSTOMER MANAGEMENT

Because customers are associated with locations, when a ticket or work order is created, the location that is entered on the ticket, sales order, or work order associates the customer with that ticket, sales order, or work order.

- Customer Agreement: The customer agreement contains the customer billing address, the customer business address, the general terms and conditions of the agreement, which includes the start date, expiration date, billing frequency, and so forth. Customer agreements also contain the agreement price schedules, which contain the billing rules that are used to calculate prices on work orders, tickets, or sales orders. Customer agreements are revisable objects. After an agreement is approved, you cannot change. However, you can create a revision of the agreement. After the revision is approved, the approved revision replaces the prior revision.
- Agreement Price Schedule: A customer agreement can contain any number of agreement price schedules, each of which contains a unique set of price calculation rules. Prices in IBM Maximo for Service Providers can be calculated as a markup of a cost, or a price can be selected based on an attribute on the work order, ticket, or sales order that is independent of the cost. Price schedules are part of a customer agreement. They contain a set of pricing rules, and they contain a set of conditions that specify when and under what conditions the price schedules are used, for example, a price schedule can specify that labor can be priced as a 20% mark up of the labor cost. Alternatively, a price schedule might state that class C application servers that are running critical applications are priced as \$735 a month.





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- Service Address: The Service Address specifies the address where the work will be performed or where Material will be delivered. Service Addresses are associated with locations (or are inherited from an ancestor location). Similar to a customer, when a location is associated with a ticket, sales order, or work order, the Service Address information is automatically added to the ticket, sales order, or work order.
- Customer Billing: The Billing application provides batch control functionality. A billing batch is created for each customer agreement according to the billing frequency that is specified in the Agreement. The batch consists of all of the work orders, Tickets, and sales orders that were completed during the billing period, as well as un-billed transactions from prior billing periods. The Billing application is used by a Service Provider to review, and to adjust, if necessary, any transactions in the batch. After the Service Provider reviews the batch contents, they can choose to allow their customers to review the batch before the batch is sent to the Service Provider's accounting system for invoicing. There is a separate application (Bill Review) that is intended to provide a secure and less detailed view of the batch for the customers' view.
- Billing Review: This application is used by the Service Provider's customers to review the work orders, tickets, and sales orders that are included in the batch. This view shows less detail to the customers then what is available to the Service Providers, for example, it shows the prices but not the costs of the Service Provider. If the customer has questions on any of these work items, they can be discussed with the Service Provider and answered prior to the bills being finalized.
- Sales Order: The Sales Order is used to create general pricing transactions that are not related to work completed or to specific costs transactions. Common uses include the billing of monthly maintenance fees, the billing for IT Asset Management, usage, performance, or the issuance of credits.
- Work Order: For the Service Provider product, it has been enhanced to include the customer and Service Address information and to calculate prices whenever planned or actual transactions are added to the work order. The ability to add miscellaneous fees and charges, for example a Trip Charge, is included. The enhancements also support the use of price quotes on a work order. There are two types of Quotes that are used in Service Provider: Fixed Price Quotes and Not to Exceed Price Quotes. The enhancements to the Work Order application are included in the Activities, Changes, and Releases applications.
- Service Level Agreement: Within the Service Provider solution, the Service Level Agreement was re-written to take advantage of the architectural similarities between SLA, Price Schedules, and Response Plans. In the process of the re-design, functional enhancements were added to improve its usability.





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- People: For the Service Provider product, it was enhanced to include the customer, who is associated with that person. This association can be used by the Maximo Security process to restrict this person's access to information that is associated with other customers.
- Locations: For the Service Provider product, it was enhanced to associate customers to a location. There can be more than one customer associated with a location, for example, there might be an owner and a user of a location, or a landlord and a tenant. The location can be associated with a Service Address, or the location can inherit the Service Address from an ancestor in the location hierarchy.
- Response Plan: It is used to provide consistency in the service management process. It provides service agents with guidance and templates to outline the precise processes and resources applied to a given situation, for example, conditions can be defined to denote which person or which group is to be responsible for a ticket or when a given template is applied to a ticket. This responsibility assignment and this template can be applied automatically. In several cases, this automation eliminates the need to train the service agent to recognize who is responsible or when to apply a certain template and also removes a source of error from the process.
- Service Request: For the Service Provider product, the Service Request was enhanced to include the customer and Service Address information and to calculate prices whenever transactions are added to the Service Request. As with work orders, the ability to add miscellaneous fees and charges is included. The enhancements to the Service Requests application are included in the Incident and Problem applications.
- Security Groups: Security access in Maximo is controlled through Security Groups. By membership in Security Groups, users can be granted authority for applications (including read, save, new, and delete access), application actions, and data. Security Groups can contain a list of customers that are associated with the Security Group and that manage all other accesses to applications within the system.
- Migration Manager: Migration is the process of promoting product configuration content from one product environment to another, for example, promoting new fields, domains, workflows, or window changes from the development environment to test and then through to production. Migration Manager can also promote non-configuration data, but data loading through the integration framework might be a better route to take, especially if the data is hierarchical. Migration Manager is a suite of three applications found as part of the System Configuration module of Tivoli Process Automation Engine and grouped into a sub-module called Migration





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2 CHAPTER 2 - SERVICE PROVIDER COMPONENTS

ARCHITECTURE

- IBM Maximo for Service Providers 7.1.2 is a set of applications and tools that work together to support service as a business. The product focus is to help the Service Provider companies to better maintain the assets of their customers. The Maximo for Service Providers product supports one or more customers and each customer can have one or more customer agreements.
- It is critical for a Service Provider to be successful in two areas:
 - O A consistent response to any request from its customers. The consistent, repeatable delivery of services in response to any anticipated service request is a major factor in the efficiency and profitability of a Service Provider. Maximo for Service Providers helps the customers through its response plan. A response plan includes these tasks:
 - Automatically assigns the appropriate person or group to be responsible for handling each request
- Selects the appropriate job plan or template to accomplish the requested work
- Notifies the appropriate individuals about the work in process
- Determines the next steps that are needed to solve the open requests
- Timely and accurate billing. Maximo for Service Providers maintains the agreements that exist between the Service Provider and each of its customers.
- The customer agreement specifies the maintenance services that will be performed so
 that each request for service can be validated to ensure that the customer is entitled to
 that service under the requested conditions. If the customer is not entitled to that
 service, the customer agreement helps the Service Provider to monitor which new
 services to offer to the customers, and, most importantly, it calculates the prices that
 will be charged for these services.
- Maximo for Service Providers calculates prices for billing in a variety of ways:
- As maintenance activities are performed, Maximo for Service Providers calculates prices based on the cost of the labor, materials, services, and tools used. Additionally, Maximo for Service Providers can calculate pricing for the use of labor by using a published list





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- price, pricing for service items, or material can be calculated using a published list price or a discount from that list price.
- Maximo for Service Providers can specify a quoted price: either a fixed quote or a not to exceed quote. A fixed quote is used as the price, and a not to exceed quote is used as the price if the calculated price exceeds the quote:
- Maximo for Service Providers calculates fees for managing assets by multiplying the number of assets under management by a unit price for each asset class. Assets are counted, and a price is calculated as the product of the unit price for the asset classification multiplied by the number of assets counted with that asset classification.
- Maximo for Service Providers calculates fees for asset usage by multiplying the usage units (GBs of storage, the number of pages printed, miles driven, square feet of space, and so forth) by a unit price. Asset usage is measured, and a price is calculated as a product of the unit price for the type of usage multiplied by the measured usage units.
- Maximo for Service Providers measures asset performance by key performance indicators (KPIs) and calculates a price from the level of performance that is measured.
- Maximo for Service Providers includes one-time charges for asset moves, adds, or changes that are calculated by using the specified price for the specific service requested.
- Pricing rules: The pricing rules that are contained in the customer agreement govern all of the previous calculations.
- Periodically, the billing process extracts the work orders, tickets, and sales orders
 containing these calculations and collects them into a batch. Each customer agreement
 has one batch. The Service Provider then reviews this batch, reviews the details of the
 bills, and adjusts the pricing, if necessary. The Service Provider's customers can also
 review limited details of the batch so that the customer can pre-approve the invoice.
 This step often speeds up payment of the invoice.
- After the reviews are complete, Maximo for Service Providers forwards the billing batch to the Service Provider's accounting system so that a customer invoice can be prepared.
- Note: The Maximo for Service Providers product provides integration to an external financial system using Maximo Enterprise Adapter (MEA). This integration is provided to specific requirements to the Service Provider's financial system. Either the transaction results are passed to the financial accounts receivable (AR) system to support matching the Enterprise Resource Planning (ERP) contract and order with the received funds or





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the transaction details are passed directly to the financial system to prepare a bill or sales order within the Service Provider's ERP system.

COMPONENTS

Maximo for Service Providers is an extension to Maximo Asset Management. It adds new applications to Maximo, extends the applications of Maximo by adding specific functionality to the applications, and also completely rewrites certain Maximo applications.

The following applications are new:

- Customer
- Customer Agreement
- Agreement Price Schedules
- Service Address
- Customer Billing
- Billing Review
- Sales Order
- Response Plan
- Customer Objects
- The following applications were extended:
- Work Orders
- Service Request, Incident, and Problem
- Location
- Asset
- Configuration Item
- Deployed Assets
- Reconciliation
- Security Groups
- Classification and Attributes
- Domains
- Solutions
- Bulletin Boards
- Item Master and Service Items

The Service Level Agreement (SLA) application was rewritten.

2.2.1 **N**EW **A**PPLICATIONS

In this section, we describe the new applications in Maximo for Service Providers.





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Customer application

The Customer application manages information about the customer, for example, billing address, currency, contact persons, communications log, and so on. We show the primary tab of the Customer application in Figure 2-1. Customers own customer agreements or service level agreements (SLAs) and the agreement's price schedules. Customers are associated with persons, locations, assets, and configuration items, and when a ticket or work order is created, the customer is copied to the ticket, sales order, or work order based on these relationships.

The relationship between a customer and any object is used by the security processes within Maximo for Service Providers to ensure that access to any customer information is controlled, and that only authorized users can view or update any information that is related to a customer.

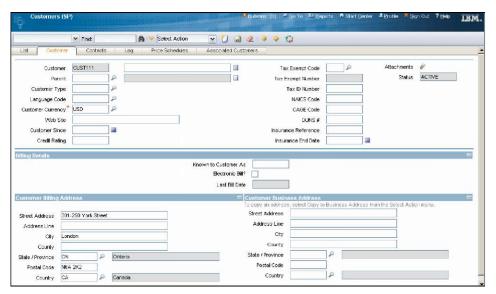


Figure 2-1 Customer application main tab

Customer Agreement Application

The Customer Agreement application contains the customer billing address, the customer business address, the general terms and conditions of the agreement, including the start date, expiration date, billing frequency, and so on. Figure 2-2 on page 12 shows the main tab of the Customer Agreement application.

Customer agreements own the agreement price schedules, which contain the business rules that are used to calculate prices on work orders, tickets, or sales orders. Customer agreements are revisable objects. After an agreement is approved, it cannot be changed, but a revision of the agreement can be created. After the revision is approved, the approved revision replaces the prior revision.





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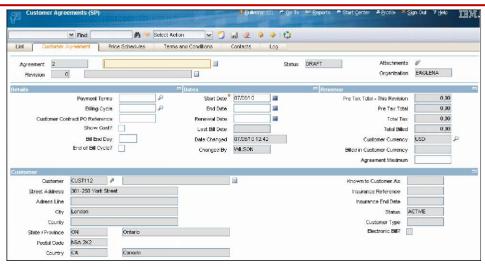


Figure 2-2 Customer Agreement application main tab

Agreement Price Schedules Application

A customer agreement can contain any number of Agreement Price Schedules, each of which contain price calculation rules. Prices in Maximo for Service Providers can be fixed prices, and they can be specified as a list price (electricians are \$55 per hour, evening work is \$75 per hour, or hydraulic pump priced at \$2,308.56). Alternately, they can be calculated as a function of cost (for example a mark-up), or a price can be calculated as a function of list price (for example a discount, for materials and services), or a price can be selected based on an attribute on the work order, ticket, or sales order that is independent of cost. For example, a Price Schedule can specify that labor can be priced as a 20% mark up of the labor cost. Alternatively, a Price Schedule can say that support services for class C application servers that are running critical applications are priced as \$735 a month. Price Schedules are owned by customer agreements. They contain a set of pricing rules, and they contain a set of conditions that specify when and under what conditions the Price Schedules are used. Figure 2-3 shows the Price Schedules main tab.

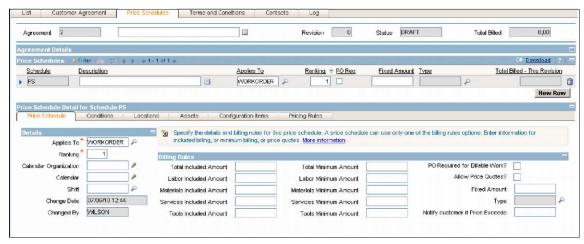


Figure 2-3 Price Schedules tab in Customer Agreement application





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Service Address Application

The Service Address application is where the physical address where the work will be performed is specified, or where material will be delivered. Figure 2-4 shows the Service Address application main tab. Service Addresses are associated with locations (or are inherited from an ancestor location). When a location is associated with a ticket or work order the service address information is added to the ticket, sales order, or work order. The address columns are added to the ticket and work order objects, and the content is copied from the service address table to the ticket or work order. This is done so that the address can be modified on the ticket or work order without modifying the master address. A common method is used to find the ancestor location with an address, if the location on the work order does not have a service address specified. There are also business rules that address the use case of changing the location on a ticket or work order after the service address has been modified.

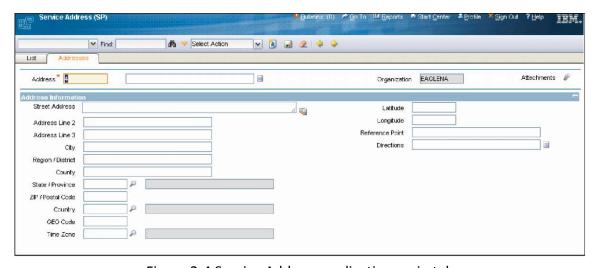


Figure 2-4 Service Address application main tab

Customer Billing Application

The Billing application provides batch control functionality, and the main tab of this application is shown in Figure 2-5. A bill batch is created for each customer agreement according to the billing frequency specified in the agreement. The batch consists of all the work orders, tickets, and sales orders that were completed during the billing period (and un-billed transactions from prior billing periods). The Billing application is used by the Service Provider to review (and to adjust, if necessary) any transactions in the batch. After the Service Provider has reviewed the batch they can allow their customer to review the batch before the batch is sent on to the Service Provider's accounting system for invoicing. There is a separate application, the Bill Review application, that is intended to provide a secure, and less detailed view of the batch for the customers view.





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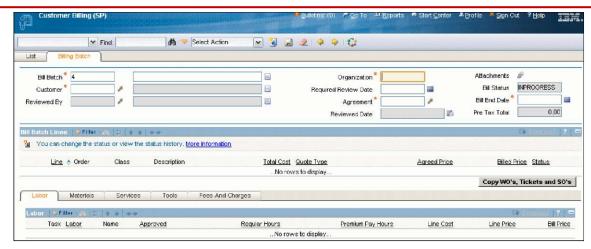


Figure 2-5 Customer Billing application main tab

• Billing Review Application

This application is used by the Service Provider's customers to review the work orders, tickets, and sales orders that are included in the batch. Figure 2-6 shows the main tab of this application. If the customer has questions about any of these work items, they can be discussed with the Service Provider and answered prior to the bill being finalized.

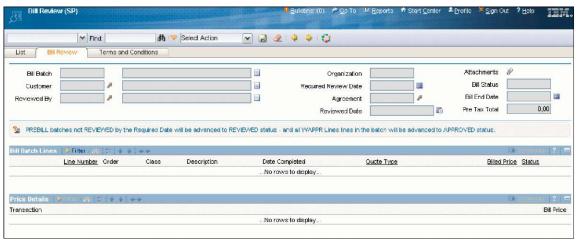


Figure 2-6 Bill Review application main tab

Sales Order Application

Using the Sales Order application, you can create pricing transactions that are not related to work that is done or to specific costs transactions. Figure 2-7 shows the main tab of this application. Common uses include billing of monthly maintenance fees, billing for IT Asset Management, usage, or performance, or issuing credits. As with the work order and ticket application, it includes customer and service address information, billing status, and billing history.





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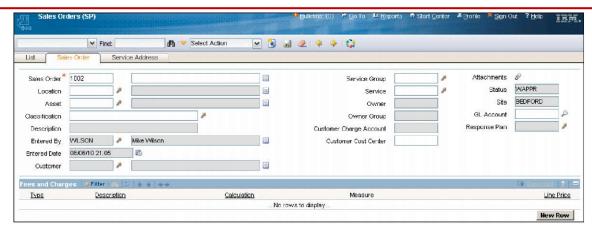


Figure 2-7 Sales Order application main tab

Response Plan Application

Figure 2-8 shows the main tab of this application. The Response Plan application provides consistency in the service management process by removing the need for service agents or maintenance supervisors to decide what processing takes place for a given situation, for example, if the conditions can be defined for when a given template is applied to a ticket, this template can be applied automatically by the response plan. This process eliminates the need to train the service agent to recognize when to apply a certain template and also removes a source of error from the process. Response plans can be associated with one or more customers or they can be global.

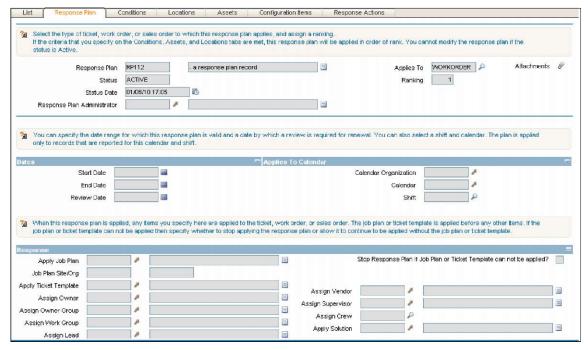


Figure 2-8 Response Plan application main tab





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The Response Plan uses a rules engine to determine:

- The Person or Group responsible for the work order or ticket
- The Vendor to whom work must be assigned
- The Job Plan to be used for a work order
- The Ticket Template to be used for a ticket
- The Solution to be used for the ticket
- The Supervisor for the ticket or work order
- The Lead for the work order
- The Work Group for the work order
- The Crew to be assigned to the work order
- Notifications to be performed for the ticket or work order
- Additional Actions to be performed to complete the repair or service delivery

Customer Objects Application

The Customer Objects application is used in conjunction with the database configuration tools that allow a Maximo administrative user to add tables and relationships to the Maximo Database. Using the Customer Objects application, you can specify the security access rules for any table that is related to the customer object.

2.2.2 EXTENDED APPLICATIONS

Maximo for Service Providers do extend Maximo Asset Management applications by adding new functionalities that are specific to Service Provider business rules. These applications and the added functionality are explained in the next section.

Work order, Activities, Changes, and Releases Applications

These applications were enhanced to include the customer and service address information, billing status, and billing history. Prices are calculated whenever planned or actual transactions are added to the work order. The ability to add miscellaneous fees and charges (for example a trip charge) is included. The enhancements also support the use of price quotes on a work order. There are two types of quotes used in Service Provider: Fixed Price Quotes and Not to Exceed Price Quotes.

Service Request, Incidents, and Problems Applications

The ticket applications were enhanced to include the customer, service address information, billing status, and billing history. Prices are calculated whenever planned or actual transactions are added to the incident. As with work orders, the ability to add miscellaneous fees and charges is included.





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Locations Application

The Locations application was enhanced to provide a relationship between locations, customer, and service address. The method to locate the service address from the location's ancestor is the same method that is used to locate the service address to be copied to the work order or ticket. The relationship between customer and locations is a many relationship: One location can be associated with many customers (one of which is primary) and a customer can be associated with many locations.

Asset Application

The Asset application was enhanced to provide a relationship between asset and customer. This is a many-to-many relationship with a customer:

One asset can be associated with many customers (one of which is primary) and a customer can be associated with many assets.

Configuration Item Application

This application was enhanced to provide a relationship between the configuration item to the customer. This is a many-to-many relationship:

One configuration item can be associated with many customers (one of which is primary) and a customer can be associated with many Configuration Items.

Deployed Assets Application

The Deployed Assets were extended to include a customer identifier. Deployed assets are created as a result of using asset discovery tools, for example, IBM Tivoli Configuration Manager, Microsoft® SMS, Centennial Discovery, and so on. IBM Tivoli Integration Composer imports the collected data into the deployed assets module. Customer is not a piece of discovered data but is set to the same value for all records imported in a specific discovery session. The deployed assets are reconciled by comparing them to the assets that represent the authorized assets. The reconciliation process compares what's there with what should be there.

• Reconciliation Application

There are several applications that manage the process of reconciling the deployed assets with the assets, which includes Reconciliation Tasks, Reconciliation Rules, Reconciliation Links, and Reconciliation Results. These applications were extended so that they include the customer, which allows the reconciliation process to be tailored for an individual customer if IT Assets are managed in a multi-customer environment.

Security Groups Application

In Maximo for Service Providers, this application provides a simple method of specifying the authority to access customer information by users who are members of the group.





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Generally these authority rules are set up differently for users who work for the Service Provider and for those users who work for the Service Provider's customers. The following access options are provided:

- Authorize Group for all customers including customer level information not related to a customer.
- Authorize Group only for customer level information not related to a customer.
- Authorize Group for person's customer or vendor, but not for customer level information not related to a customer.
- Authorize Group for customers in person's customer access list and for customer level information not related to a customer.
- Authorize Group for customers listed on the security group and for customer level information not related to a customer.

Classifications and Attributes Applications

Classification structures categorize information and assign attributes related to a classification, for example, if a seal is classified as an oil seal, it can have the attributes of material, insider diameter, outside diameter, and width. A mechanical seal, on the other hand, can have attributes of alignment type, body material, and shaft diameter. Similarly, desk top computers have disk size, processor speed, and memory size as attributes, but computer operating systems have a version number.

Maximo for Service Providers adds a customer link to both the classification structure and the attribute, for example, this makes it possible for a Service Provider to allow one customer to track just the version number for their operating system assets, and to allow another customer to track the version number and patch level for operating systems.

Domains Application

The Synonym, ALN, and Numeric domains were extended to allow a domain value to be customer specific. Filtering and validation of domain entries is based on the customer (or primary customer) on the object to which the domain value is being added.

Solutions Application

Solutions were extended so that they can be global or customer specific. Filtering and validation of solution is based on the customer on the object to which the solution is being associated.

• Bulletin Boards Application

Bulletin Board entries can be customer specific. A Customer sub tab was added to the Audience tab, and the user's security group filters bulletin board messages that are displayed on the Start Center and that are broadcast through email.





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Item Master and Service Items Applications

A customer association and also a List Sales Price were added to the item table. A supporting enhancement was made to the price schedule application to allow material or service items used on a work order to be priced as a discount from the list price, in addition to the existing functionality of marking up the Item's cost.

2.2.3 REWRITTEN APPLICATION

The Maximo for Service Providers Service Level Agreement application was been written. This application is part of IBM Maximo for Asset Management, but it has a different behavior in Maximo for Service Providers.

SLA Application

This application was re-written to take advantage of the architectural similarities between SLA, Price Schedules, and Response Plans. In the process of the re-design, functional enhancements were added to improve its usability, including the support of the SLA Hold functionality and the use of de-centralized calendars to support the use of SLAs by clients who operate in multiple time zones. In the Service Provider context, SLA can be associated with one or more customers, or they can be global. This application was optimized for performance by introducing an initial query that performs classification and customer matching. Figure 2-9 shows the main tab of SLA.

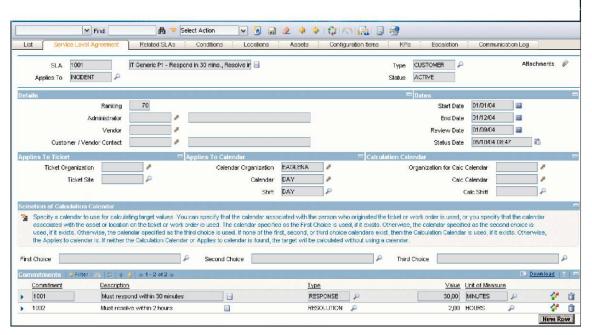


Figure 2-9 SLA application main tab





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III CHAPTER III- ASSETS AND LOCATIONS SCENARIO

APPLICATIONS INVOLVED

The applications that we use in this chapter are:

- Assets (SP)
- Locations (SP)

IMPLEMENTATION

We describe the steps required to implement this scenario using the assets (SP) and Locations (SP) applications.

The first step is to configure and create a relationship with assets and locations. After this is done, we can start to work with our assets.

3.2.1 IMPLEMENTATION STEPS

Execute the following steps to implement the scenario:

- Pre-configuration:
 - Basic configuration (customer, site)
 - Create a location
 - Create an asset
- Moving the assets:
 - Select the assets
 - Select the location
 - Apply the selected locations in Assets application and save the configuration

3.2.2 PRE-CONFIGURATION

First a basic configuration is required for this scenario.

3.2.3 SETTING UP AN ASSET

As an asset Administrator, you can create a new asset from the asset application. To create a new asset, select Go To \rightarrow Assets \rightarrow Assets \rightarrow New asset icon.

The system sets the asset's status to NOT READY by default. You must enter the asset's name.

3.2.4 SETTING UP A LOCATION

Location is the application used to set the location in asset. This helps the customer know where their assets are located.

To create a new location, select Go To \rightarrow Assets \rightarrow Location, and click New Location.

The system sets status field to OPERATING (read only). You cannot change this field.

Other fields used are:





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- Location: The name or ID of the location
- Description: A description of the location
- Type: Operates when location is Working
- Sub tab used are:
- Systems: System of the location
- Parent: Parent of the location
- Children: Children of the location

3.2.5 MOVING THE ASSETS

After the applications involved in this scenario are configured, you can work with the assets. We show you how to move the assets.

Selecting the assets

To select the assets:

1. Open the Move Modify Assets application by selecting Go To \rightarrow Assets \rightarrow Assets (SP). Click Select Actions \rightarrow Move Modify Assets.

Selecting the location

You must select the assets in the To Location field, and set the SHIPPING location for assets in location BPM3100. See Figure 3-1.

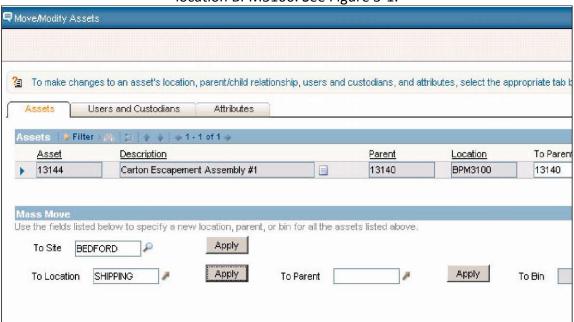


Figure 3-1 Setting the location

Applying selected locations in assets and saving the record

After entering the SHIPPING location in To Location field, click Apply, and OK.





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Now the asset is in the new location: SHIPPING.

In this scenario, we showed you how to move the asset from one location to another. Similarly we can move the parent or bin. We can also move multiple assets in one step.





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IV CHAPTER IV- BILLING SCENARIO

APPLICATIONS INVOLVED IN THIS SCENARIO

The scenario described in this chapter uses the following Maximo for Service Providers applications:

- Customer (SP)
- Customer Agreement (SP)
- Price Schedule (SP)
- Service Request (SP)
- Response Plans (SP)
- Customer Billing (SP)
- Bill Review (SP)

We describe how to use each application in detail in this chapter.

Some of the Maximo Enterprise Asset Management applications are used to configure this scenario, which include:

- WorkFlow Designer
- Actions
- Purchase Requisitions
- Purchase Orders
- Receiving

STEP BY STEP IMPLEMENTATION

In this section, we provide implementation steps for this scenario.

4.2.1 CREATING A CUSTOMER AGREEMENT WITH A PRICE SCHEDULE

The Customer Agreement application is where you can configure the agreement details. This agreement is configured with a monthly billing cycle. The bill end day is set to 1, which makes the bill batch to select all work order, ticket, and sales order from the previous month, starting on day 2, until day 1 of the current month. You can access the Customer Agreement (SP) application by selecting $\mathbf{Go} \ \mathbf{To} \ \rightarrow \mathbf{Service} \ \mathbf{Provider} \ (\mathbf{SP}) \ \rightarrow \mathbf{Customer} \ \mathbf{Agreement} \ (\mathbf{SP})$.





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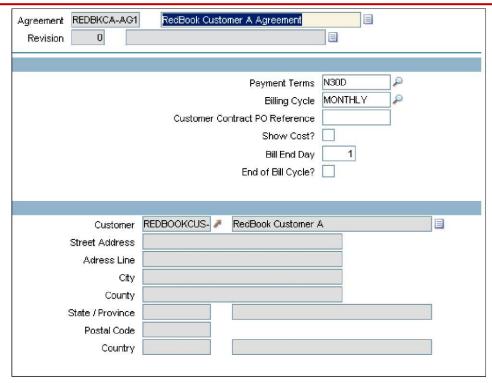


Figure 4-1 Company A Customer Agreement details

The customer agreement was created using the data shown in Figure 4-1, with the following values:

Agreement: RedBKCA-AG1

Description: Company A Agreement

Revision: 0

Payment Terms: N30DBilling Cycle: MONTHLY

■ Bill End Day: 1

Customer: Company AStart Date: 19/06/10End Date: 19/06/11

Status: Draft

Note: The customer agreement can be revised if you need to change the values in the price schedule of an approved customer agreement. When you create a new revision of a customer agreement, it has the status of Pending Revision. After changing this status to Approved, the previous revision status is changed to Revised.

Tip: The customer agreement can be applied to work order, tickets, and sales order only when it is in the Approved status.





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In the Customer Agreement (SP) application, you insert the price schedule details. After creating the customer agreement, go to the Price Schedule tab, and click New Row.

The price schedule is part of the Customer Agreement (SP) application. In this scenario, we use a standard work order price schedule with a special price configuration for services. This scenario agreement contains two price schedules: one configured for high priority work orders and another configured for normal priority work orders. The difference between these two price schedules is in conditions and in price rules tabs. The data of the price schedule is shown in Figure 4-2.

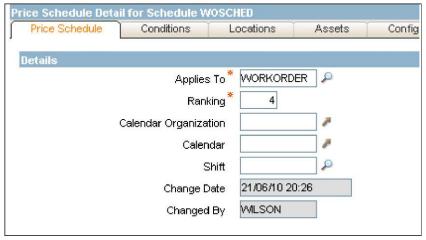


Figure 4-2 Price Schedule example

This agreement contains two price schedules, one with high priority, which was configured as follows:

Price Schedule: HIPRIO

Description: High Priority Price Schedule

Applies To: WORK ORDER

Ranking: 4

Note: The Ranking field is used when applying a customer agreement to tickets, work orders, and sales orders. If more than one price schedule fit the conditions to be applied, the one with the lower ranking number is applied. If two or more of these price schedules have the same ranking value, the system selects one of them.

At the Conditions section of the Conditions sub tab of the price schedule tab, the data was configured:

Field Name: Reported Priority

Condition: EQUALS

Value: 2

At the Service sub tab, the price schedule tab was configured as shown in Figure 6-3 with this data:





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Default Calculation Percentage: 100.00

Markup from Item Cost: true

Note: At this example the "," was configured as a decimal point. This configuration can vary from country-to-country.

The high priority price schedule has a condition configuration, shown in Figure 4-3, to match the high priority work orders. The conditions configuration is done at the Conditions sub tab of Price Schedule tab.

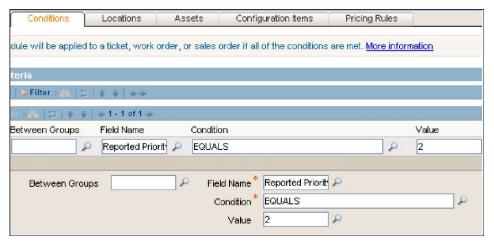


Figure 4-3 High priority condition configuration of a price schedule

The second price schedule data was configured as follows:

Price Schedule: WOSCHED

Description: Normal Priority Price Schedule

Applies To: WORK ORDER

Ranking: 4

No conditions were configured for this price schedule. The configuration of the Pricing Rules sub tab is shown in Figure 4-4, and it was configured with the following data:

Default Calculation Percentage: 30,00

Markup from Item Cost?: True



Figure 4-4 Pricing rules configuration of Services in WOSCHED price schedule





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After configuring the Price Schedule you must change the Customer Agreement status to approved, which you can do by selecting the Change Status option from the Select Action menu or clicking Change Status. A dialog is displayed, and you can change the customer agreement to Approved status.

4.2.2 CREATING A RESPONSE PLAN

Using the Response Plans (SP) application you can create a work order that is related to the opened service request. You can access this application by clicking Go To \rightarrow Service Provider (SP) \rightarrow Response Plans (SP).

Note: We do not describe the configurations of actions used in the Response Plan (SP) application. For more information about Action application you can access:

The actions of this response plan contain actions for creating a work order and set its vendor to Company E.

The values used in this response plan are:

Response Plan: CUSARP1

Description: Customer A high priority response plan

Status: ACTIVEApplies To: SRRanking: 3

Tip: To change the response plan status, you must choose the **Change Status** action on the **Select Action** menu, or select **Change Status** on the Toolbar menu.

After creating the response plan, you must associate it with a customer. This can be done by selecting the **Associate Customer** from the **Select Action** menu, as shown in Figure 4-5.





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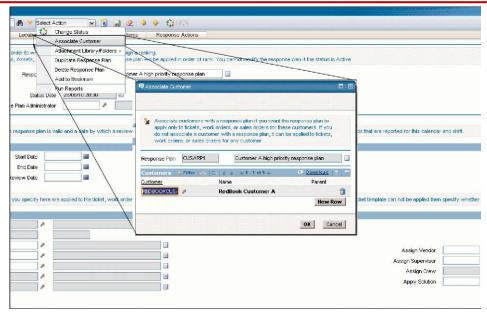


Figure 4-5 Associate Customer response plan action

Applying a response plan to tickets and work orders: The Ranking field is used when applying a response plan to tickets and work orders. If more than one response plan fits the conditions to be applied, the one with the lower ranking number is applied. If two or more of these response plans have the same ranking value, the system selects one of them.

To configure this response plan to be applied to high priority service requests, add a condition to it. Go to the **Conditions** section of the **Conditions** tab. This condition is similar to the one described in 4.3.2, "Creating a customer agreement with a price schedule".

4.2.3 CREATING A SERVICE REQUEST

The Service Request application is used to handle its clients' calls. This application contains details about the service request, including, the person information that was reported with the service request, the summary and the service request details, asset, location, customer, the reported date, and the target date. In the Related Records tab, you can create tickets, work orders and solutions that are related to this service request. In the scenario described here, the response plan, applied to this service request, creates a work order related to the service request. The example service request is shown in Figure 4-6 and Figure 4-7. You can access the Service Request (SP) application by selecting **Go To → Service Desk → Service Request (SP).**





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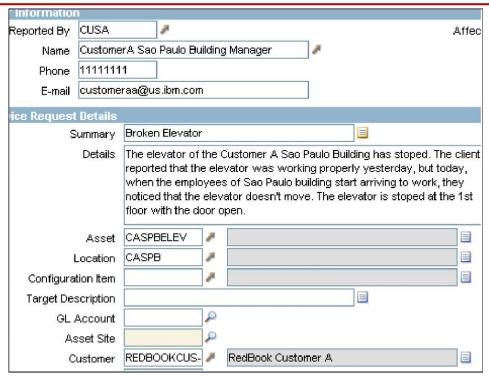


Figure 4-6 Service Request: Details, asset, location and customer details

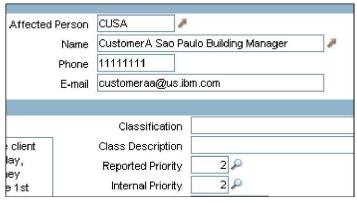


Figure 4-7

The service request was configured with the following data:

- Affected Person/Reported By: CUSA
- Name: Customer A (Company A) Sao Paulo Building Manager
- Phone: 11111111
- Email: Customeraa@us.ibm.com
- Summary: Broken Elevator
- Details: The elevator of the Company A Sao Paulo Building has stopped. The client reported that the elevator was working properly yesterday, but today, when the employees of Sao Paulo building arrived at work, they noticed that the elevator was not working. The elevator was stopped at the 1st floor with the door open.
- Asset: CASPBELEV





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Location: CASPBSite: Bedford

After creating the service request, you must apply a response plan to it, which you can do by selecting **Apply Response Plan** from the Select Action menu.

4.2.4 CREATING A CUSTOMER BILLING

The Bill Batch (SP) application is used to calculate the prices of all completed tickets, work orders, and sales orders, related to a specific customer agreement. You can access the Bill Batch (SP) application by selecting Go To \rightarrow Service Provider (SP) \rightarrow Customer Billing (SP).

The bill batch was created with the following data:

Bill Batch: CABB5

Customer: REDBOOKCUS-A
 Agreement: RedBKCA-AG1
 Bill End Date:01/07/2010

When the agreement is set, the date is automatically configured for the first day of the actual month, which in this case is 01/07/2010. After creating the customer billing and saving it, click **Copy WO's, Tickets and SO's** to copy all of the not yet billed, but completed work orders, tickets, and sales orders from the agreement. Each work order, ticket, and sales order is placed as a line in the **Bill Batch**

Lines and their details are on the sub tabs of this section. At the **Pre Tax Total** field, there is the total value of each line in this customer billing. The customer billing details are shown in Figure 4-8. The Bill Price is editable for any necessary adjustments. After reviewing this billing, you change its status to PREBILL so this billing is shown in the Bill Review (SP) application.





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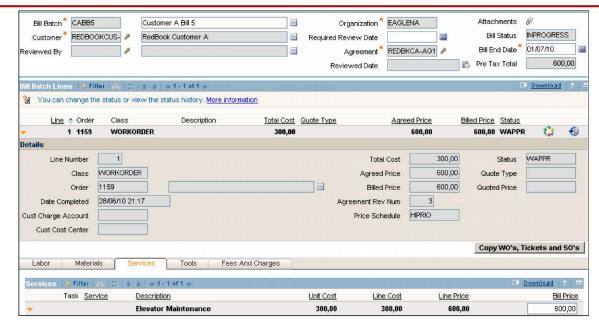


Figure 4-8 Customer Billing details

In the Bill Review application, the customer can see the details of the billing, as shown in Figure 4-13 on page 44. The bill review application can be accessed by clicking **Go To** \rightarrow **Service Provider (SP)** \rightarrow **Bill Review (SP)**.

The customer can review the billing and approve or dispute each line of the bill review. If the customer approves the lines of this billing, the billing is ready to be billed; otherwise, the customer can dispute the billing and this agreement and the disputed lines are not billed until the customer and the Service Provider achieve an agreement.





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V CHAPTER V- CUSTOMER AGREEMENT SCENARIO

APPLICATIONS INVOLVED

The following applications are used in this scenario:

- Customer Agreements (SP)
- Item Master (SP)
- Work Order Tracking (SP)
- Purchase Requisitions
- Purchase Orders
- Receiving
- Customer Billing (SP)
- Bill Review (SP)

STEP BY STEP IMPLEMENTATION

In this section, we describe the step-by-step implementation of this scenario:

5.2.1 CREATING A CUSTOMER AGREEMENT WITH PRICE SCHEDULES

You can access the Customer Agreement (SP) application by selecting Go To \rightarrow Service Provider (SP) \rightarrow Customer Agreement (SP).

A customer agreement is created using the following data, as shown in Figure 5-1.

- Customer Agreement: CARBCUS-A.
- Description: Customer Agreement.
- Customer: Customer A.





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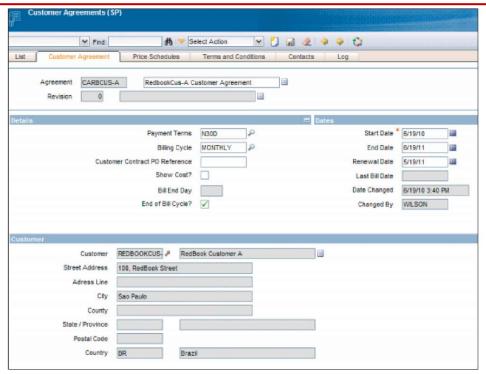


Figure 5-1 Customer Agreement application

A price schedule is created using this data, as shown in Figure 5-2 on page 47:

Schedule: PSWO'01

Description: Price Schedule - Non-Emergency

Applies To: WORK ORDER

Ranking = 20





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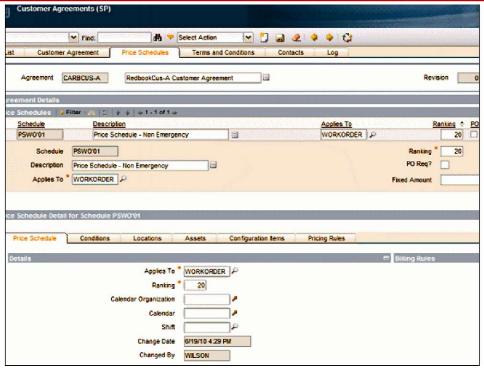


Figure 5-2 Price Schedule tab

On the Conditions tab, enter Included Services, as shown in Figure 5-3:

- Service Group: FACILITY Facilities Maintenance Services.
- Services: NONEMERG Non-Emergency Repairs.



Figure 5-3 Conditions tab





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On the Pricing Rules tab, select the Materials tab:

Default Calculation Percentage for stocked items: -15.00

Discount from List Price is selected

On the Pricing Rules tab, select the **Services** tab:

- Service Group: FACILITY Facilities Maintenance Services
- Service: ELEVATOR Elevators
- Calculation Percentage: 40.00
- Markup from Item Cost is selected

Another price schedule is created:

- Schedule: PSWO'02
- Description: Price Schedule Emergency
- Applies To: WORK ORDER
- Ranking = 10

On the Conditions tab, enter Included services, as shown in Figure 5-4:

- Service Group: FACILITY Facilities Maintenance Services.
- Services: EMERG Emergency Repairs.

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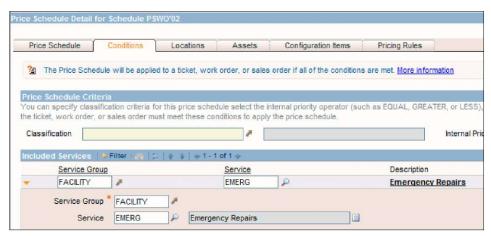


Figure 5-4 Conditions tab

On the Pricing Rules tab, select the Materials tab:

- Default Calculation Percentage for stocked items: 0.00
- Discount from List Price is checked
- Change the status of the customer agreement to APPROVED.





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5.2.2 CREATING A WORK ORDER FOR NON-EMERGENCY REPAIRS

You can access the Work Order Tracking (SP) application by selecting **Go To → Work Orders → Work Order Tracking (SP)**.

A work order is created with the following parameters:

■ Work Order: RB'001

Description: Work order for Non-Emergency repairs

Location: RBCUS-A Location

Service Group: FACILITY Facilities Maintenance Services

Service: NONEMERG Non-emergency repairs

Note: When entering the location, the customer field is automatically populated.

The customer agreement CARBCUS-A with price schedule PSWO'01 - Price Schedule - Non Emergency is applied to the work order by clicking **Select Action - Apply Customer Agreement** or **Select Action - Select / Deselect Price Schedule**. A list of eligible price schedules for the customer mentioned on the work order is displayed. See Figure 5-9.

When planning the items and services that will be used and done in this work order, line prices are calculated according to the pricing rules applied.

In Figure 5-5, the item 29331 - Building Thermostat has:

Unit Cost: 50.00 dollars.

List Sales Price: 70.00 dollars.

• Line Price is calculated according to the pricing rule: Discount from List Price as -15.00 percentage, resulting in 59.50 dollars.





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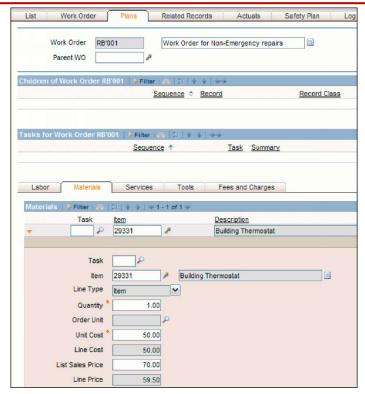


Figure 5-5 Work order with planned item

In Figure 5-10 on page 53, the service ELEV - Elevator Repair Service has:

- Unit Cost: 1,000.00 dollars.
- Line Price is calculated according to the pricing rule: Markup from Item Cost as 40.00 percentage, resulting in 1,400.00 dollars.

After planning all labors, items, services, and tools that are necessary in this work order, change the status to APPROVED. When executing the work order, select the reserved item.

Note: The reorder process is done by going to the Inventory application, and selecting Select Action → Reorder → Reorder Direct Issue Itms / Svcs.

Running the reorder, a purchase requisition is generated containing the Service you planned.

After approving the purchase requisition by clicking **Select Action** → **Create PO**, the requisition is executed and the Purchase Order - PO is generated containing the information about the purchase requisition.

In the PO, enter the company and the subcontractor that executes the service. After entering all of the necessary information, approve the PO.

In the Receiving application, select the PO and receive the service.

The service is now displayed in the work order. See Figure 5-6.





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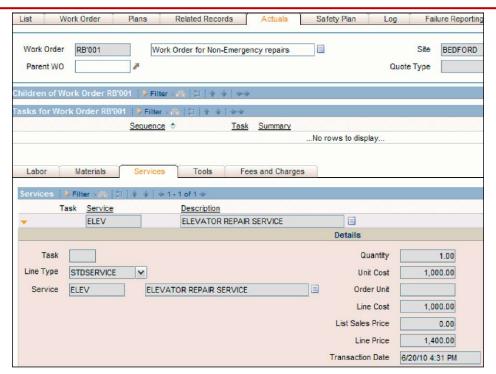


Figure 5-6 Work order in execution with a service item

Now you can COMPLETE the work order by changing the status.

5.2.3 CREATING A WORK ORDER FOR EMERGENCY REPAIRS

A similar process for non-emergency repairs is done for emergency repairs.

A work order is created with the following parameters:

- Work Order: RB'002.
- Description: Work Order for Emergency repairs.
- Location: RBCUS-A Location.
- Service Group: FACILITY Facilities Maintenance Services.
- Service: EMERG Emergency Repairs.

The customer agreement CARBCUS-A, with price schedule PSWO'02 - Price Schedule - Emergency, is applied to the work order by selecting **Select Action** → **Apply Customer Agreement**.

Another way to apply a customer agreement is to select **Select Action** \rightarrow **Select/ Deselect Price Schedule** a list of eligible price schedules for the customer is mentioned on the work order.

When planning items and other necessary things that will be used or done in this work order, line prices are calculated according to the pricing rules that are applied.

On the Plans tab, enter the item 29331 - Building Thermostat.

Unit Cost: 50.00 dollars

List Sales Price: 70.00 dollars





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Line Price is calculated according to the pricing rule: at List Price, resulting in 70.00 dollars

Approve the work order, and select this reserved item on Actuals tab / Materials tab. Execute all necessary work, and now you can COMPLETE the work order.

5.2.4 Creating the Customer Billing and Bill Review

You can access the Customer Billing (SP) application by selecting Go To → Service Provider (SP) → Customer Billing (SP).

The customer billing is created by entering the following values, as shown in Figure 5-7:

Bill Batch: BBRBCUS-A

Description: Customer Billing

Customer: Customer AAgreement: CARBCUS-A

Note: Bill End Date is automatically fulfilled because we entered the billing cycle as MONTHLY and marked End of Bill Cycle in the customer agreement.

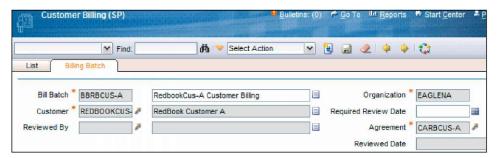


Figure 5-7 Customer Billing application

To bring all the records to be billed by the Bill End Date, click Copy WOs, Ticket and SOs.

In this scenario, RB'001, work order for non-emergency repairs, and RB'002 work order for emergency repairs, are displayed in Bill Batch Lines. The customer has the chance to Approve or Dispute each bill line.

Note: In general, the quantity of disputed bill lines is less than the approved ones. To optimize this process, the customer must dispute all lines he judges as necessary, and then click **Select Action** → Advance all WAPPR Lines to APPR. All lines waiting for approval can be changed to approved just by calling this action. After reviewing the billing, the customer must change the status to REVIEWED by Customer.





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VI CHAPTER 6- PRICING SCENARIO

USE CASE

A sales representative created a customer agreement and entered the price scheme in the Maximo for Service Providers, Customer Agreement application. The manager approves this agreement and it becomes effective.

Customer A orders maintenance service for desktop PCs and printers.

Sales orders matching the terms of the agreement are priced specially, for example, desktop PC service will be charged at a discounted amount for Customer A instead of at the catalog price.

IMPLEMENTATION OF PRICING RULES

We implement this scenario using Maximo for Service Providers applications:

- Customer (SP)
- Customer Agreements (SP)
- Meters
- Locations (SP)
- Assets (SP)
- Classifications (SP)
- Sales Orders (SP)

Customer and customer agreement

Used to create a Customer and customer agreements.

Meters

Meters represent meter readings found on each printer, either as a software or hardware counter. Use the **Meters** application to create a printouts meter to track the number of printed pages of the laser printers:

- 1. Open the Meters application by selecting Go To → assets → Meters.
- 2. Create a new meter using this information:

Meter Type CONTINOUS
Reading Type ACTUAL

3. Save the meter.

Types of meters you can define: An asset or location can have multiple meters associated with it.

You can define the following three types of meters:





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Continuous Meters are cumulative and tend to measure consumption or accumulation. They include meters that track such things as miles, hours, engine starts, pieces produced, or fuel consumed.

Gauge Meters show a range of values, such as fuel levels, temperature, pressure, noise level, and so forth. Gauge meters can be used to perform condition monitoring on assets or Locations.

Characteristic Meters are observational in nature and have a list of possible values. They track things, such as noise level, vibration level, clarity, or color. Characteristic meters can be used to perform condition monitoring on assets or Locations.

Locations (SP)

Use the Locations (SP) application to create Seattle, New York, and Boston locations for Customer A, as shown in Figure 6-1.



Figure 6-1 Locations

Assets (SP)

Use the Assets (SP) application to create assets and associate them with Customer and meters:

- 1. Open assets application (Go to → assets → Assets (SP))
- 2. Create a new asset using this information:
- Asset LP1
- Description Laser Printer
- 3. Click the Meters tab.





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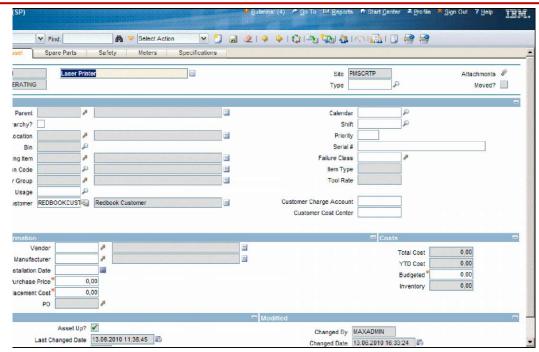


Figure 6-2 Assets (SP)

4. Click New Row.

Complete the fields using this information:

Sequence 1

Meter PRINTOUTS

Meter Type CONTINUOS

- 5. Save the asset.
- 6. Change asset status to OPERATING.

Classifications (SP)

Use the Classifications (SP) application to make classifications usable by the Sales Order (SP) application:

- 1. Click Go To → Administration → Classifications (SP).
- 2. Find IT Issue classification.
- 3. Open IT Issue classification.
- 4. In the Use With section, click New Row.
- 5. In the Use With Object field, type PLUSPGBTRANS, as shown in Figure 6-3.





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Figure 6-3 Use With PLUSPGBTRANS

- 6. Click New Row button again.
- 7. In the Use With field, type PLUSPSALESORDER.

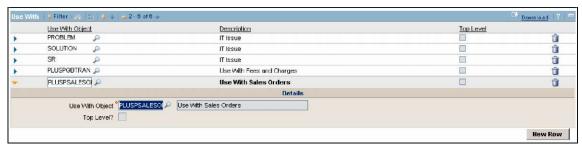


Figure 6-4 Use With PLUSPSALESORDER

- 8. Save the classification, and click the **List** tab.
- Repeat steps 2-9 for the following classifications to add PLUSPGBTRANS and PLUSPSALESORDER:
- IT Issue \ Hardware
- IT Issue \ Hardware \ Desktop
- IT Issue \ Hardware \ Mobile Computer
- IT Issue \ Hardware \ Printer

Defining price schedules

Each customer agreement contains one or more price schedules for services you provide. Price schedules define your agreed pricing rules and the conditions under which you apply those rules. Each price schedule can contain different rules for calculating prices for services, for example, you can create a price schedule that adds a markup percentage to reported labor costs. You can specify various markups for internal and external labor and separate markups for multiple vendors.

You also can specify various IT asset management fees that you include in every billing cycle, for example, you can create a price schedule that calculates a price based on the number of assets that you manage or that calculates a price based on the use or performance of an asset.

In this scenario, we define three price schedules to reflect the pricing terms agreed between Service Provider and Customer A, as shown in Table 6-1.





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| Price schedule | Asset Classification | Pricing rule |
|----------------|----------------------|------------------|
| S1 | Desktop PC | Number of assets |
| S2 | Ink jet printers | Flat rate |
| S3 | Laser printers | Usage |

To define the three price schedules to reflect the pricing terms agreed between Service Provider and Customer A:

- 1. Click Go to \rightarrow Service Provider (SP) \rightarrow Customer Agreements (SP).
- 2. Find customer agreement for Customer A, which we show in Figure 6-5.

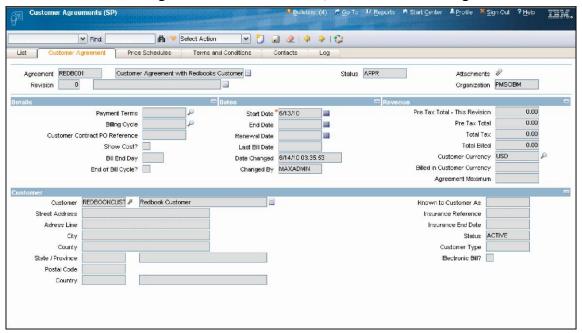


Figure 6-5 Customer agreement

- 3. Select **Action** → **Revise Agreement**
- 4. Complete the Comments field in the Revise Agreement Dialog box.
- 5. Enter the Revise Price Schedule, as shown in Figure 6-6.

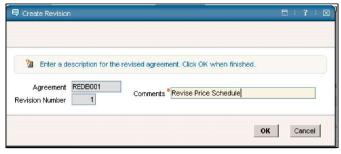


Figure 6-6 Revise Agreement Dialog

6. Click the **Price Schedules** tab, shown in Figure 6-7.





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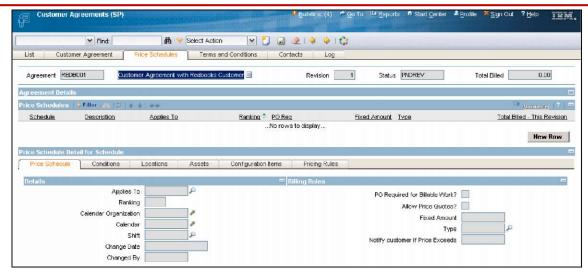


Figure 6-7 Price Schedules Tab

7. Under the Price Schedules section, click New Row.

Price Schedule Description Applies To Ranking

Enter these values:

- S1
- Manage Desktop / Notebook PC PLUSPSALESORDER 100, see Figure 6-8.

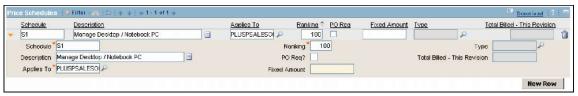


Figure 6-8 Price Schedules

- 8. Click the **Conditions** sub tab.
- 9. Click the arrow next to the Classification field, and select **Classify.**
- 10. Select **IT Issue \ Hardware Issue \ Desktop Hardware Issue** from the classification tree, as shown in Figure 6-9.

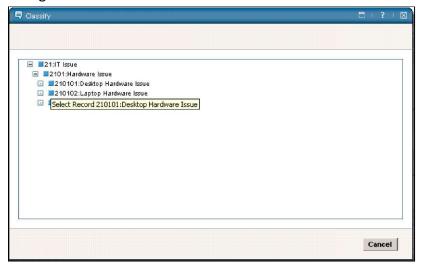


Figure 6-9 Classify





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- 11. Click the **Pricing Rules** sub tab.
- 12. Under the Asset Management sub tab, click New Row.
- 13. Select IT \ Computer_Equipment \ Computer \ Desktop
- 14. Populate the fields using this information
 - Range From 1
 - Range To 60
 - Unit Price 100
- 15. Click **New Row,** and select the **IT \ Computer_Equipment \ Computer \ Desktop** classification.
- 16. Populate the fields with the following values.
 - Range From **61**
 - Range To 120
 - Unit Price **70**
- 17. Save the customer agreement. We just defined our first price schedule.

Defining the price schedule for other types of assets

Now we define the price schedule for other types of assets:

- 1. Under the Price Schedules section, click New Row.
- 2. Populate the fields using this information, as shown in Figure 6-10:

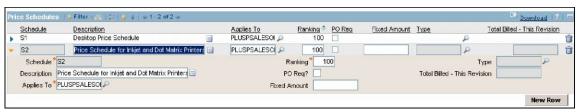


Figure 6-10 Price Schedule S2

3. Save the customer agreement record.

S2 price schedule: After saving the record, focus is moved to the S1 price schedule. To continue working with the S2 price schedule, click the small arrow button next to S2.

- 4. Click the **Conditions** sub tab.
- 5. **Enter IT Issue \ Hardware Issue \ Printer Hardware Issue** in the classification field, as shown in Figure 6-11.





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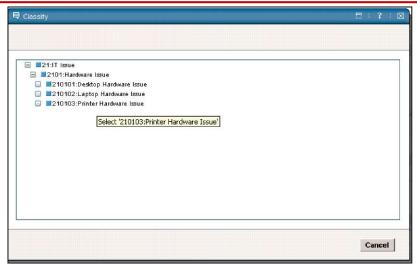


Figure 6-11 IT Issue \ Hardware Issue \ Printer Hardware Issue

- 6. Click the **Pricing Rules** sub tab.
- 7. Select IT \ Computer_Equipment \ Printer for classification. See Figure 6-12.

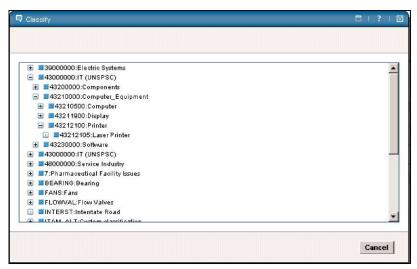


Figure 6-12 IT \ Computer Equipment \ Printer

- 8. Populate the fields using this information
 - Range From 1
 - Range To 1000000 (Enter a large number)
 - Unit Price 50
- 9. Save the customer agreement, and in the Price Schedules section, click **New Row.**
- 10. Populate the fields using this information:
 - Price ScheduleS3
 - DescriptionManage Laser Printers
 - Applies To PLUSPSALESORDER
 - Ranking50





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- 11. Click the **Conditions** sub tab, click the arrow next to Classification field, and select **Classify.**
- 12. From the classification tree, select IT Issue \Hardware Issue \ Printer Hardware Issue.
- 13. Click these subtabs: **Pricing Rules** → **IT asset** → **Asset Usage.**
- 14. Under the asset Usage section, click New Row.
- 15. Use this information to populate the fields in the form.

| • | Meter Name | Printouts |
|---|------------|-----------|
| • | Range From | 1 |
| • | Range To | 10000 |
| • | Unit Price | 40 |

| • | Meter Name | Printouts |
|---|------------|-----------|
| • | Range From | 10001 |
| • | Range To | 20000 |
| - | Unit Price | 50 |

| • | Meter Name | Printouts |
|---|------------|-----------|
| • | Range From | 20001 |
| • | Range To | 30000 |
| • | Unit Price | 60 |

| • | Meter Name | Printouts |
|---|------------|-----------|
| • | Range From | 30001 |
| • | Range To | 40000 |
| • | Unit Price | 70 |

| • | Meter Name | Printout |
|---|------------|----------|
| • | Range From | 40001 |
| • | Range To | 50000 |
| | Unit Price | 80 |

| • | Meter Name | Printouts |
|---|------------|-----------|
| • | Range From | 50001 |
| • | Range To | 10000000 |
| | Unit Drice | 80 |

Unit Price80

16. Save the customer agreement.

- 17. Click Change Status.
- 18. In the Change Status dialog box, populate the fields using this information:
 - New Status Approved
 - Memo Approve Price Schedules
- 19. Click **OK** button.





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Sales Orders (SP)

Use sales orders to bill for services that are not related to work orders or tickets, for example, you bill monthly management fees, trip charges, and several types of IT asset management fees with sales orders. You associate a customer with the sales order, and then apply a customer agreement and price schedule to the sales order. The price schedule can apply fixed fees. You can specify additional fees and charges on the sales order. If you create a sales order to bill for IT asset maintenance, you specify certain information about the assets, apply the agreement and price schedule, and let the system calculate billing prices.

In this scenario, we apply customer agreement and price schedules to calculate billing prices for the services provided to Customer A:

- Select Go To → Service Provider (SP) → Sales Orders(SP).
- 2. Click New Sales Order.
- 3. Select SEATTLE as the Location.
- 4. Select IT Issues \ Hardware Issue \ Desktop Hardware Issue, as shown in Figure 6-13.

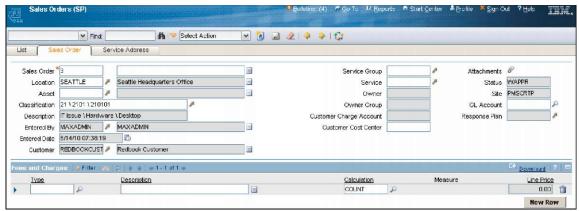


Figure 6-13 Sales Orders (SP)

- Select Action → Apply Customer Agreement
- 6. Click **OK** to close System Message Dialog box
- 7. Under the Fees and Charges section, click New Row
- 8. Use this information to populate the fields:

| • | Type | Management |
|---|-----------------------------|--|
| • | Calculation | Count |
| • | Classification | Computer Equipment/ Computer/ Desktop |
| • | Total Asset Count total) | 120 (This means Customer has 120 asset items in |
| • | Asset Count for Sales Order | 10 (This means 10 items are subject to sales order) |

Price is calculated automatically as \$700.





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This is \$70 per unit. By selecting **COUNT** as calculation type, you charged the customer at a lower price (\$70) instead of \$100 per item.

- Try reducing the total amount to 60 items. The unit price will change to \$100 for this amount.
- 10. Save the sales order, and change the Order Status to APPROVED.
- 11. Click **New Sales Order**, and populate the fields with following the values:
 - Location BOSTON
 - Classification
 IT Issue/ Hardware Issue/ Printer Hardware Issue
- 12. Select Action → Apply Customer Agreement. Price schedule S3 is applied to the sales order.
- 13. Click **New Row** under the Fees and Charges section.

1

14. Populate the fields using this information:

TypeCalculationUsage

Meter PrintoutsTotal Usage 20000

Reading

Line Price is calculated as \$50. This is the price range calculated for a range of 10.001 to 20.000 total printouts. Change the number to 20.001 to see Line Price changing to \$60. See Figure 6-14.

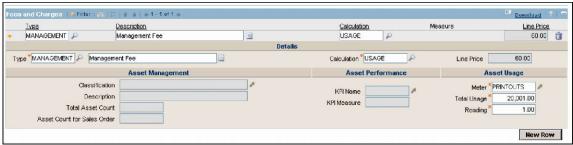


Figure 6-14 Fees and Charges

- 15. Click Go to \rightarrow Service Provider (SP) \rightarrow Sales Orders (SP).
- 16. Create a new sales order, and type the following information:
 - Location NYC
 - ClassificationIT Issue/ Hardware/ Printer
- 17. Save the sales order, and select Action → Select Deselect Price Schedule
- 18. In the Select Deselect Price Schedule dialog box, click **New Row.**
- 19. In the Price Schedule dialog box, select the **Show filtered Agreement Price Schedules for this Customer** option (default option).
- 20. Under the Price Schedules table, select Price Schedule
- 21. Click **OK** to close the dialog.
- 22. In the Fees and Charges section, click New Row.





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23. Populate the fields with this information:

■ Type Management

CalculationCount

Classification
 IT/ Computer Equipment/ Printer

■ Total Asset Count 1 (Any # greater than 0)

Asset Count for Sales Order

Line price is calculated as \$50 per item. This is the flat rate for dot matrix printers.



