SERVICE CONTRACT MANAGER

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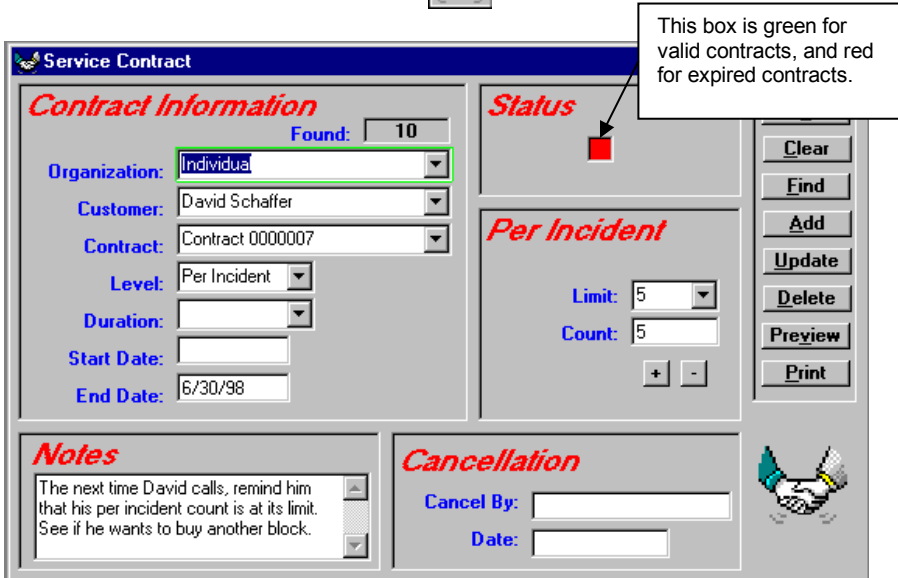
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CHAPTER 8 – Service Contract Manager

Overview

Most companies that provide some kind of extended product or technical support do so on a service contract basis. Support contracts can cover different service levels, such as unlimited, on-site, warranty, per incident, etc. Service contracts can also cover different time durations, such as annual, quarterly, 90 day, etc.

SDS HelpDesk can manage all of your organization's service contracts. When a customer requests help, you no longer have to guess or call another department to check the contract status. Service Contract Manager automatically verifies whether a contract is still valid, and lets you know directly from the Issue Manager module.

Click the **Service Contracts** icon [icon] in the toolbar to open the module.

Service Contract Manager

NOTE: The green box around the Organization field indicates that this is a mandatory field and must be filled in for each contract.

Steps to . . .

Add a New Service Contract

With SDS HelpDesk you can add multiple service contracts for an organization, add different service levels, and different time durations for each level. You can also add notes about the contract, or track per-incident usage.

Your system administrator needs to set a format for service contract codes. Contract codes can include fixed text, date/time, company ID, etc. as well as an incrementing counter. If you are the system administrator and have not yet set the format, refer to Chapter 5, Setting Up HelpDesk, Format Contract Code, for details on how to do this.

1. Select the organization name from the Organization drop down list, or click the Organization label to select from a PickList. If there is a contact at the organization, the name is entered for you automatically. If there are multiple contacts, select the appropriate one from the Contact drop down list.

2. Select a service level from the Level drop down list, or click the label to select from a PickList. Service levels can include such items as unlimited, limited, warranty, per-incident, phone support, on-site, etc.

3. Select a time period that the service contract is in effect from the Duration drop down list, or click the label to select from a PickList. Duration can include such items as Annual, 30-day, Quarterly, etc. If the duration is not in the list, type the item in the Duration box.

   When you add a new duration, the following dialog box will open. Enter the number of days the period covers. **EXAMPLE**: If you add "Quarterly" as a duration, enter 90 in the dialog box. Click **OK**.
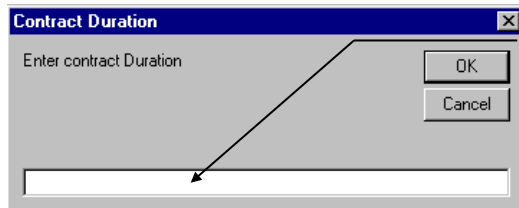
Enter the number of **days** the duration period covers in this box.

Add a New Service Contract (cont'd)

4. Enter the date the contract takes effect in the Start Date box. Service Contract Manager automatically calculates and enters the end date for you.

5. If this is a per-incident contract, select the number of issues covered by the contract from the Limit drop down list, or click the label to select from a PickList.

6. Enter any appropriate contract notes in the Notes area.

7. When finished, click the **Add** button. A new contract number is displayed in the Contract field. When a contract is valid, the Status button turns green. If a contract is not valid, the Status button remains red.

NOTE: If your company uses special contract numbers and you want to continue using them, you can type the number directly into the Contract box rather than let SDS HelpDesk assign a number for you. Check with your system administrator if you have a question about which format to use.

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8. To enter another contract, click the **Clear** button to give you a blank screen.

Modify a Service Contract

You will need to modify the service contract information whenever a contract comes up for renewal. The Status box turns red when the contract expires.

1. Select the organization from the Organization drop down list, or click the Organization label to select from a PickList.

2. If there is only one contract for this organization, it is displayed. If there are multiple contracts, select the one you want to modify from the Contract drop down list.

3. Modify the contract information as needed.

4. When finished, click the **Update** button to save your changes.

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Cancel a Service Contract

If a customer cancels a service contract, you can enter the date, the name of the person who canceled it, and any pertinent information as to the reason for the cancellation.

1. Select the organization from the Organization drop down list, or click the Organization label to select from a PickLlist.

2. If there is only one contract for this organization, it is displayed. If there are multiple contracts, select the one being canceled from the Contract drop down list.

3. Enter the name of the person who is canceling the contract in the Cancel By box.

4. Enter the effective date of the cancellation in the Date box.

5. Click the **Update** button. The Status box turns red. At the same time, the Contract box in Issue Manager also turns red for this organization.

Delete a Service Contract

In most cases, you want to maintain a record of your active and inactive service contracts. On occasion you might need to delete a service contract that never went into effect.

1. Select the organization from the Organization drop down list, or click the Organization label to select from a PickList.

2. If there is only one contract for this organization, it is displayed. If there are multiple contracts, select the one you want to delete from the Contract drop down list.

3. Click the **Delete** button.

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Add or Modify Per-Incident Blocks

Most per-incident service contracts allow customers to purchase issue blocks. In these cases a customer pays a set amount, up-front, to cover the current issue and/or a number of future issues. SDS HelpDesk lets you track the number of issue blocks purchased and used.

1. Select the organization from the Organization drop down list, or click the Organization label to select from a PickList.

2. If there is only one contract for this organization, it is displayed. If there are multiple contracts, select the appropriate per-incident contract from the Contract drop down list.

NOTE: Steps 3 and 4 refer to a portion of the Service Contract Manager screen. It is recreated here for your reference.
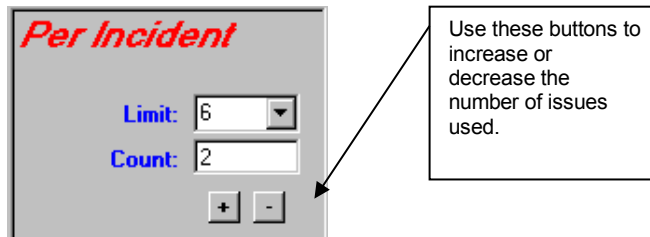
3. Select the number of issues covered by the contract from the Limit drop down list, or click the Limit label to select from the PickList. Click the **Update** button to save your changes.

4. When a customer calls with a new issue, the number in the Count box is adjusted automatically. The Status box on the Service Contract Manager screen remains green until the number in the Limit box is reached.

There may be times when you need to increase or decrease the number of issues used (e.g., if you need to reopen a previous issue, or if a customer is not satisfied that the issue has been resolved). Click the ± or − buttons to change the number used. Click the **Update** button to save your changes.

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Use the Search Engine to Find a Service Contract

The Search Engine provides a flexible and powerful way to find service contracts.   It supports "wildcards" so that it is possible to enter just a few letters of a criterion in order to find possible matches. A question mark (?) stands for any single character and an asterisk (*) stands for a number of characters. Wildcards can be placed before, after, or in the middle of other characters.

In the following examples a single criterion at a time is used for searching. Please keep in mind that you may narrow the amount of search results by using multiple search criteria at the same time.

Searching for Service Contracts

The Service Contract module lets you search for contracts based on number, organization, contract level, or contract duration. The Found box displays the number of service contracts that meet your search criteria.

The following are some search examples:

Search by Contract Number

1. Click the **Clear** button to give you a blank Contract screen.

2. Enter a number in the Contract data entry box.

3. Click the **Find** button.

Search by Organization

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Enter all or a portion of the organization name in the Organization data entry box. Use an asterisk before or after the name to represent the portion you didn't include (e.g., *West, Scott**, **soft*).

3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

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Searching for Service Contracts (cont'd)

Search by Organization Using the PickList

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Organization label**. A PickList of Organizations will appear.
    Double-click the organization you want. The PickList will close.

3. Click the **Find** button. When multiple records are found, press the **down
    arrow** key to sequence through the records.

Search by Organization Using the Drop Down List

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Organization drop down arrow** to see the list of organizations.
    Select the organization you want.

3. Click the **Find** button. When multiple records are found press the **down
    arrow** key to sequence through the records.

Search by Organization Using Lookup Tables

1. Click the **Clear** button to give you a blank Service Contract screen.

2. **Right-click** on the Organization label. A Lookup Table of Organizations will
    appear. **Double-click** on the organization you want. The Lookup Table will
    close.

3. Click the **Find** button. When multiple records are found, press the **down
    arrow** key to sequence through the records.

Search by Contract Level Using the PickList

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Level label**. A PickList of Contract Levels will appear. **Double-
    click** the service level you want (e.g., Basic, Per-Incident). The PickList will
    close.

3. Click the **Find** button. When multiple records are found, press the **down
    arrow** key to sequence through the records.

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Searching for Service Contracts (cont'd)

Search by Contract Level Using the Drop Down List

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Level drop down arrow** to see the list of Contract Levels. Select the service level you want (e.g., Basic, Warranty, or Per-Incident).

3. Click the **Find** button. When multiple records are found press the **down arrow** key to sequence through the records.

Search by Contract Level Using Lookup Tables

1. Click the **Clear** button to give you a blank Service Contract screen.

2. **Right-click** on the Level label. A Lookup Table of Contract Levels will appear. **Double-click** on the service level you want (e.g., Basic, Extended, or Per-Incident). The Lookup Table will close.

3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search by Contract Duration Using the PickList

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Duration label**. A PickList of Contract Durations will appear. **Double-click** the duration you want (e.g., Annual, Semi-Annual, Monthly). The PickList will close.

3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Search by Contract Duration Using the Drop Down List

1. Click the **Clear** button to give you a blank Service Contract screen.

2. Click the **Duration drop down arrow** to see the list of contract durations. Select the duration you want.

3. Click the **Find** button. When multiple records are found press the **down arrow** key to sequence through the records.

Searching for Service Contracts (cont'd)

Search by Contract Duration Using Lookup Tables

1. Click the **Clear** button to give you a blank Service Contract screen.

2. **Right-click** on the Duration label. A Lookup Table of Contract Durations will appear. **Double-click** on the duration you want (e.g., Annual, Monthly, Semi-Annual). The Lookup Table will close.

3. Click the **Find** button. When multiple records are found, press the **down arrow** key to sequence through the records.

Print SnapShot Report

You may want to print out information for a contract. You can do this directly from the Service Contract module.

1. Select the organization from the Organization drop down list, or click the Organization label to select from a PickLlist.

2. If there is only one contract for this organization, it is displayed. If there are multiple contracts, select the appropriate contract from the Contract drop down list.

3. Click the **Preview** button to see the report before it is printed.

4. Click the **Print** button to get a SnapShot Report for this contract.

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