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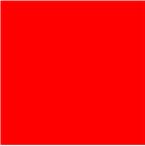




**ORACLE®**

## **Ten Things You May Not Know About Sales & Service Contracts**

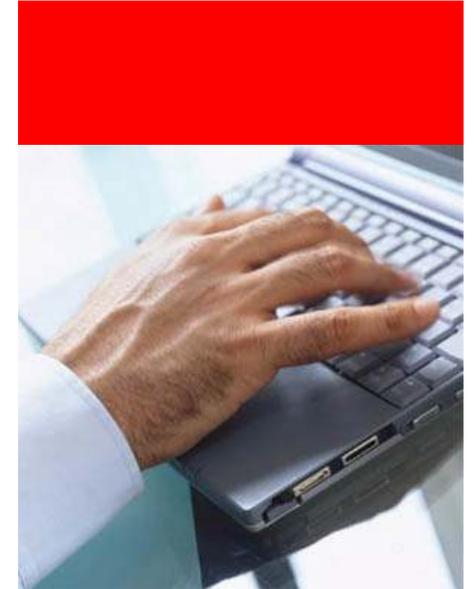
**Mohan Dutt**  
**Oracle Corporation**

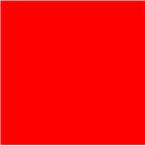


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## Presentation **Agenda**

- Session Objectives
- Target Audience for this presentation
- R12 Features That You May Not Know
- Key Benefits of Implementing R12 Features

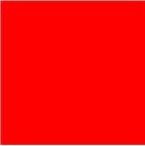




## Session Objectives

- Learn about new Release 12 features in Oracle Sales and Service contracts
- Take away tips and techniques to use Oracle Sales and Service Contracts
- Review the benefits of implementing the new Release R12 features

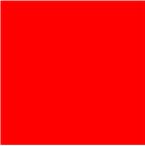




## Target Audience For This Presentation

- Oracle Customers currently evaluating Oracle Contracts Suite modules
- Oracle Customers who are planning to upgrade to R12 from prior releases
- Oracle Implementers who are planning to implement Oracle Contract suite modules





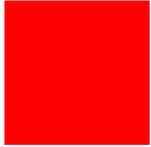
# Oracle Sales and Service Contracts Overview

## Oracle Sales Contracts

- Oracle Sales Contracts is a comprehensive solution that enables companies to standardize their corporate contract policies, improve internal controls, and comply with all contractual obligations and regulatory requirements.
- Oracle Sales Contracts enables easy, consistent, and secure creation and management of sales agreements across all selling channels, including field sales, telesales, and e-commerce.

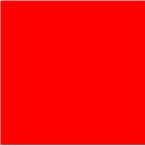
## Oracle Service Contracts

- Oracle Service Contracts simplifies contract management and provides a centralized repository for entitlement information.
- Using Oracle Service Contracts rapidly create, manage, and update service contracts, warranties, and extended warranties on sales of goods or services.
- Use Oracle Service Contracts to provide service based on real-time entitlement data. As a result, you minimize contract leakage, increase recurring revenues, and provide targeted services while reducing operational costs.



# 10 Things You May Not Know

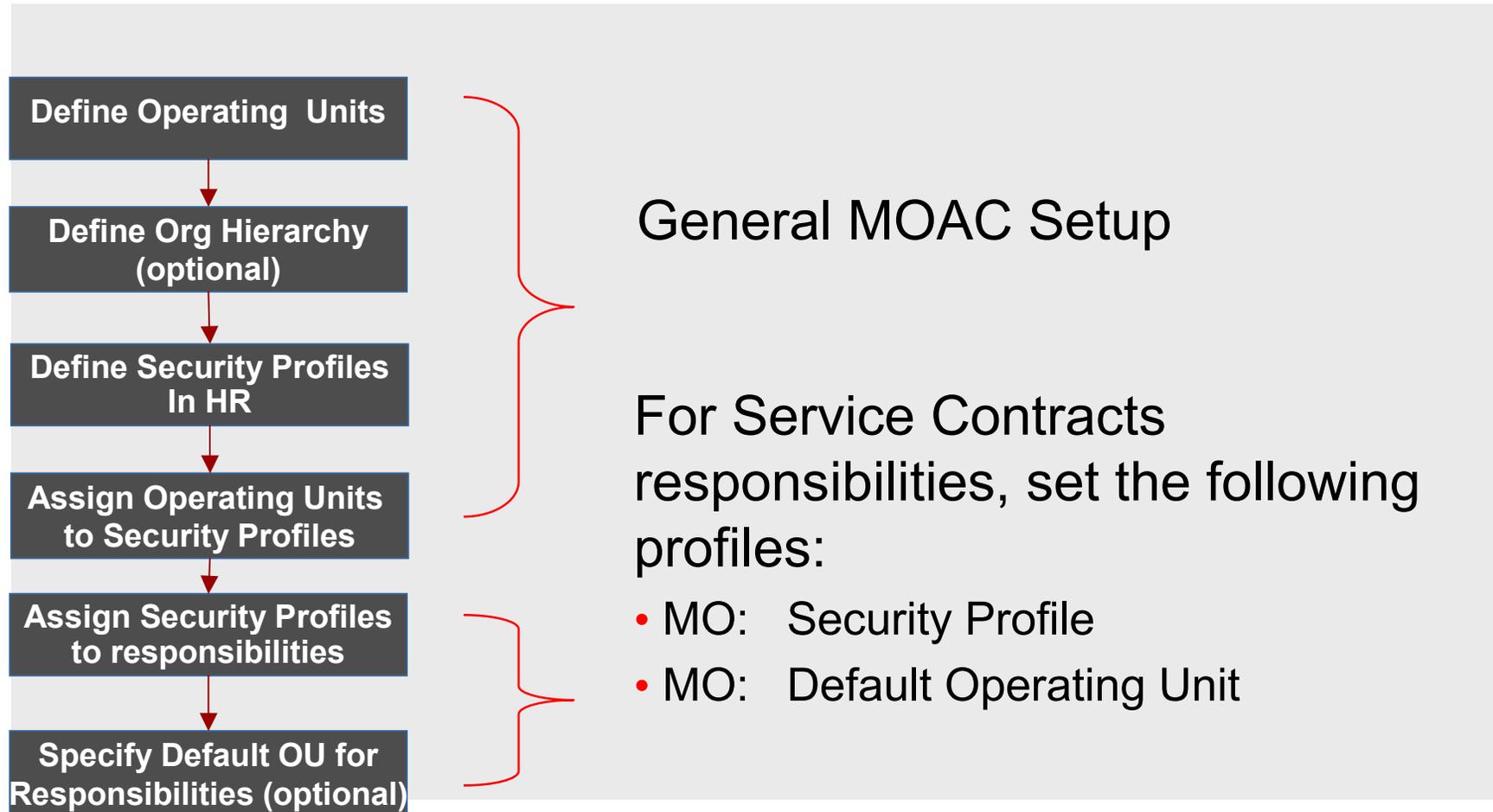
- 1 **Shared Services Center Support**
- 2 Contract Negotiation Lifecycle
- 3 Service Contracts Admin Workbench
- 4 Flexible Approval Rules
- 5 Enhanced Communication Templates
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## Multi-Org Access Control Setup

- Setup security profile/s for the implementation
  - You can setup one or more security profiles depending on the nature and level of access you need to provide to different users
- Assign the security profile/s to the profile option ‘MO: Security Profile’ for each responsibility used
- Optionally setup the profile option ‘MO: Default Operating Unit’
- Optionally setup the profile option ‘MO: Operating Unit’
  - This profile option is used to determine the relevant operating unit if no value is defined for the ‘MO: Security Profile’ profile option
- For Sales Contracts, set up the following information in the Organization Definition Form (was a profile option in previous releases and has now been migrated):
  - OKC: Clause Sequence Category

# Multi-Org Access Control



# Sales Contracts: Multi-Org Access Control For Search / Create Clauses

The screenshot displays the Oracle Contract Management interface. At the top, there is a 'Clauses' header and an 'Analyze Contract Clauses' button. Below this is a search section with fields for 'Operating Unit' (set to 'Vision Corporation'), 'Keyword', 'Type', 'Title' (set to '52%'), and 'Number'. A red box highlights the 'Operating Unit' dropdown with the text: 'Select an operating unit to search for clauses'. Below the search fields are filters for 'Intent' (All), 'Status' (Approved), 'Start Date', and 'End Date', along with checkboxes for 'Provisions Only' and 'Show All Versions'. A 'Go' and 'Clear' button are at the bottom of the search section.

Below the search section is the 'Create Clause' section. It includes a 'Select Clauses' table with columns 'Select', 'Details', and 'Title'. The table lists several clauses with 'Show' links. A red box highlights the 'Operating Unit' dropdown in the 'Create Clause' form, which is set to 'Vision Operations', with the text: 'Select an operating unit to create clauses. Once saved, you cannot change the operating unit'. The 'Create Clause' form includes fields for 'Number', 'Clause Title' (set to 'Payment Terms'), 'Display Name' (set to 'Payment Terms'), 'Intent' (set to 'Sell'), 'Type' (set to 'General Terms'), 'Default Section', and 'Description' (set to 'Payment Terms Clause'). There are also buttons for 'Cancel', 'Submit', 'Apply and Add Details', and 'Apply'. Below the form is a 'Variables' section with a table for inserting variables into the text.

Insert	Variable Name	Description
No search conducted		

# Multi-Org Access Control – Sales Contract Templates

## Contract Templates

**Search**

\* Operating Unit  Name

Keyword  Layout Template

Status  Translated From Template

**Select an operating unit to search for templates**

## Create Contract Template

\* Indicates required field

Operating Unit  Status **Draft**

\* Name  Language

\* Intent  Translated From Template

\* Start Date  Layout Template

(example: 19-Apr-2006) Instructions

End Date

Description   Global

Check to make the template available for duplication in all operating units

**Select an operating unit to create a template. Once saved, you cannot change the operating unit**

**Contract Expert**

Enabled  Expert Clauses Mandatory

\* Default Section

# Multi-Org Access Control Process – Sales Contracts Workbench

**Contracts**

**Advanced Search**  
[Personalize Header: \(PageHeaderRN\)](#)

Document Type: All Order Management Types

**General Information**  
[Personalize "General Information"](#)

Order Number:

Operating Unit: **Vision Operations**

Salesperson:

Contract Administrator:

Status:

Exclude Closed Orders  
 Exclude Cancelled Orders  
 Contains Contract Terms

[Personalize Flow Layout](#)

[Personalize "OM Documents Summary"](#)

Select Contract: Actions Update Contract Terms  |  ⏪ Previous

Select	Number	Name	Document Type	Customer	Status	Type	Amount	Currency	Customer Number	Salesperson	Contract Administrator	Contract Template	Customer PO Number	Days To Expir
<input type="radio"/>	<a href="#">400</a>	KK-SA1	Sales Agreement	Business World	Active	KK-SA1		USD	1608	Jones, Mrs. Lisa		kk-selltemp1		
<input type="radio"/>	<a href="#">401</a>	401	Sales Agreement	Business World	Entered	KK-SA1		USD	1608	Jones, Mrs. Lisa		kk-selltemp1		

# MOAC for Service Contract Authoring

**Operating Unit must be specified when creating a contract. The initial value is defaulted from MO: Default Operating Unit**

Operating Unit: Vision Operations

Category: [Empty]

Template: [Empty] Find

Modifier: [Empty]

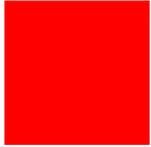
Create Cancel

**List of available operating units restricted by setting of MO: Security Profile**

## MOAC Feature Enabled For

- Searching Templates and Contracts
- Entitlement Search
- Viewing Contracts in Launchpad / Navigator
- Copying Contracts
- Mass Change
- Reports





# 10 Things You May Not Know

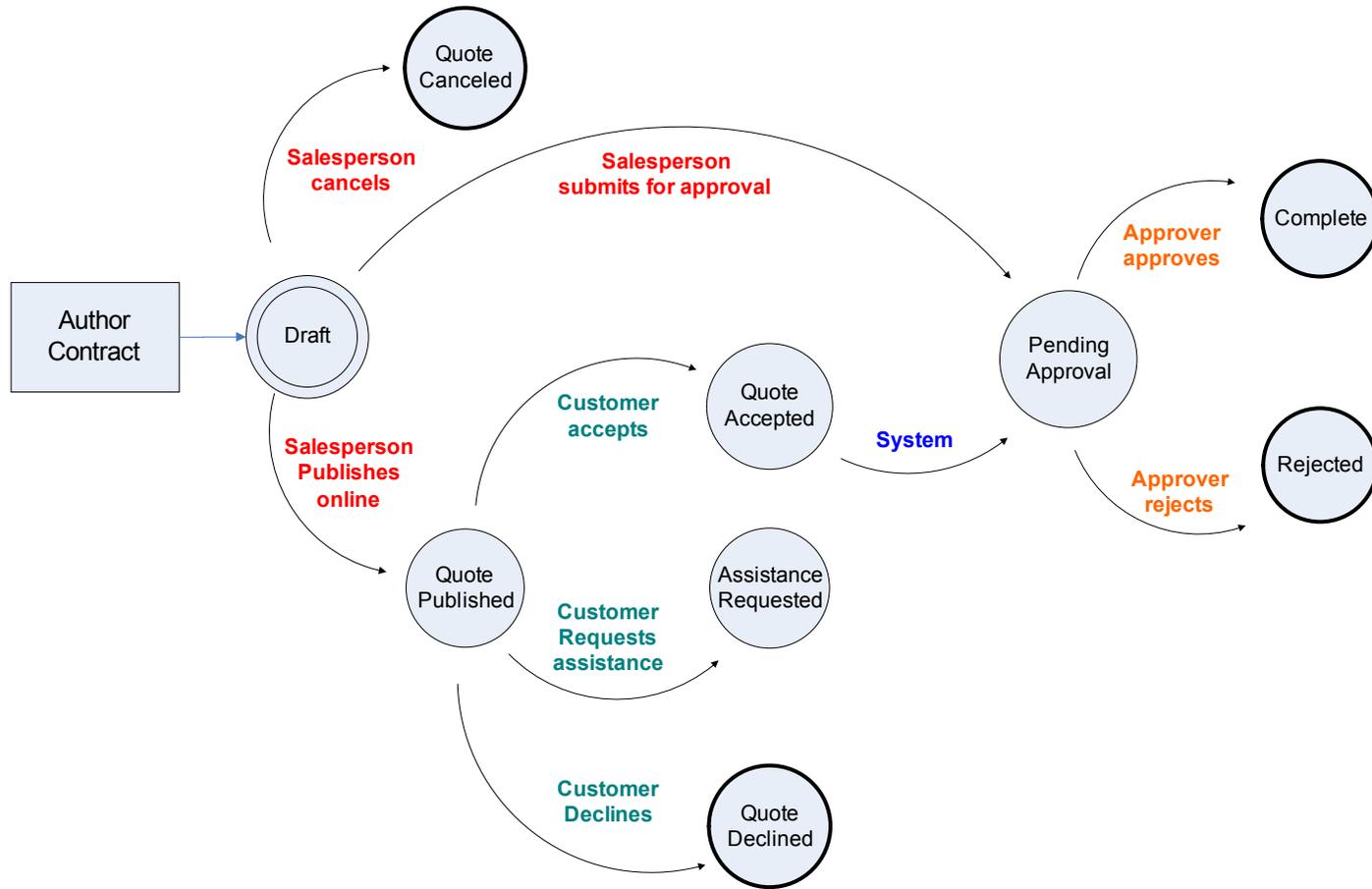
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## Contract Lifecycle Management

- Negotiation Status: More granular status tracking to allow proactive process monitoring
- Internal and External Notifications to alert users: notifications to contract administrators and customers
- New Approval Options: Support for various contract approval scenarios ranging from manual to fully automated approvals
- New Workflow – Contract Approval Process (OKSPRCS) for entire contract lifecycle



# Negotiation Statuses



# Select Contracts for Publishing

Select contract and select action 'Publish to Customer'

**My In Process Contracts**

View

**Select Contracts:**   |

[Select All](#) | [Select None](#)

Select	Contract	Customer	Status	Negotiation Status	Start Date	End Date	Due Date	Follow-Up Action	Amount	Currency	Request Status
<input type="checkbox"/>	<a href="#">22016</a>	General Technologies	Entered	Publish QA Failed	27-May-2006	26-May-2007	27-Apr-2008	30 Days Notification Verification		USD	
<input type="checkbox"/>	<a href="#">22018</a>	Business World	Entered	Publish QA Failed	07-May-2006	06-May-2007	27-Apr-2006	Call Customer		USD	
<input type="checkbox"/>	<a href="#">22019</a>	Computer Service and Consulting	Entered	Draft	31-May-2006	30-May-2007	01-May-2006	30 Days Notification Verification		USD	

Indicates reminder notifications are currently not being sent for these contracts  
 Indicates follow-up actions are past due.

# Customer Acceptance Portal

Available actions are –  
accept, decline and request  
assistance

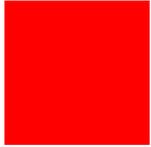
Select	Contract Number	Description	Start Date	End Date	Amount	Renewal	Quote
<input type="radio"/>	Demo-2-R07-JUN-06 22:20:10	Renewals - Online	02-Aug-2006	01-Aug-2007	53,955.00 USD	✓	
<input type="radio"/>	Demo-3-R07-JUN-06 22:25:46	Renewals - Online	02-Aug-2007	01-Aug-2008	1,780,515.00 USD	✓	
<input type="radio"/>	Demo-4-R07-JUN-06 22:26:46	Renewals - Online	02-Aug-2007	01-Aug-2008	59,350.50 USD	✓	

Indicates Contract is pending assistance from salesrep.

Contracts pending salesrep  
assistance are marked.  
These contracts can be  
accepted or declined

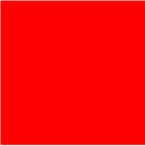
Flag indicates if  
the pending  
contract is a  
renewal

Clicking quote  
displays quote in  
.pdf format



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## Administrator Workbench

- A configurable workbench that enables sales reps to easily track progress of open service contracts
- Notifications Bin allows users to view their workflow notifications
- Simple and Advanced Search
- Seeded Bins enable users to view contracts in various stages of negotiation
- Administrator Actions

# Administrator Workbench

The screenshot shows the Oracle Service Contracts Administrator Workbench interface. It features a search bar at the top, a 'Notifications' section with a list of contract-related alerts, a 'My In Process Contracts' section with a table of active contracts, and a 'Shortcuts' sidebar with links to various actions. Red boxes and arrows highlight these key features, with callout text boxes explaining their functionality.

**Quick Search enables users to search for new and renewal contracts**

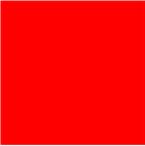
**Notifications for contracts that need attention**

**My In Process Contracts bin displays all open contracts in the user's queue**

**Shortcuts enable users to perform other actions**

From	Subject	Sent	Due
Able, Marsha	<a href="#">Contract 89345 - requires your approval</a>	20-Jul-2006	21-Jul-2006
Able, Marsha	<a href="#">Contract 89000 - requires your approval</a>	20-Jul-2006	21-Jul-2006
Able, Marsha	<a href="#">Contract 22343 - has been Signed</a>	20-Jul-2006	
Able, Marsha	<a href="#">Contract 22343 - has been approved by user marsha</a>	20-Jul-2006	
Able, Marsha	<a href="#">Contract 22320 for Business World (375.00 USD) has been activated</a>	20-Jul-2006	

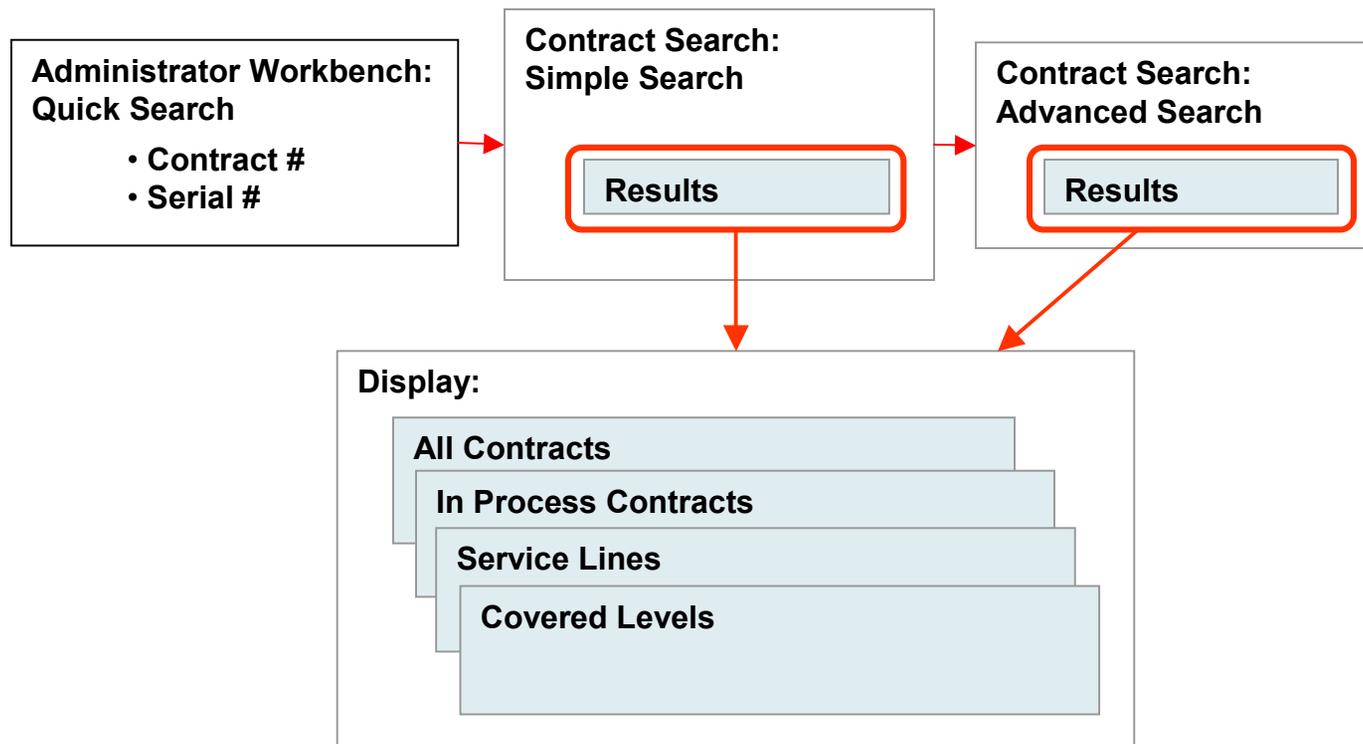
Select	Contract	Customer	Status	Negotiation Status	Year	Verification	Amount
<input type="checkbox"/>	22016	General Technologies	Entered	Published	2006	2007	2008



## Contract Search Enhancements

- New HTML search pages
- Search by contract, service line or covered level attributes and display results as contracts, service lines or covered levels
- Drill into contract, service line or covered level details from results set
- Personalize results set. Export results to Excel
- Perform actions like 'Print/Publish Quote', 'Submit for Approval' etc. from results set

# Contracts Search



# Contracts Search

The screenshot shows the 'Service Contract Search' interface. A red box highlights the 'Display' dropdown menu, which is currently set to 'All Contracts'. A red arrow points from a list of options to this dropdown. Another red box highlights the 'Advanced Search' button in the top right corner. A third red box highlights the 'Export' button, with a red arrow pointing from a list of actions to it. The search criteria include Operating Unit, Contract Number (22010), Order Number, Customer, Party Number, Quote To Contact, Status, and Negotiation Status. There are also date pickers for 'End Date From' and 'End Date To', and text input fields for 'Follow-Up Action', 'Days Until Action Due', and 'Serial Number'. Below the search criteria are 'Go' and 'Clear' buttons. At the bottom, there is a 'Select Contracts:' dropdown set to 'Publish To Customer', a 'Go' button, and an 'Export' button. Below this is a table with columns for 'Contract Number', 'Customer', and 'Category'. The table contains one row with the contract number 22010, customer Business World, and category Service Agreement.

- All Contracts
- In-Process Contracts
- Service Lines
- Covered Levels

Advanced Search

Perform Action on contract(s)  
Export results to Excel

Select	Contract Number	Customer	Category
<input type="checkbox"/>	22010	Business World	Service Agreement

# Advanced Search

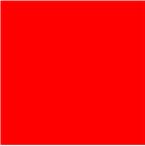
The screenshot shows the 'Service Contract Search' interface. At the top, there is a 'Display' dropdown menu set to 'Covered Levels' and a 'Simple Search' button. Below this is the 'Advanced Search' section, which includes a note: 'Note that the search is case insensitive'. The search parameters are organized into several sections: 'Contract', 'Effectivity', 'Service Line', and 'Covered Level'. The 'Contract' section includes fields for Operating Unit, Contract Number, Modifier, Keyword, Order Number, Contract Group, Salesperson, Sales Group, Party Role (set to 'Customer'), Party Name, Party Number, Quote To Contact, Status, and Negotiation Status. The 'Effectivity' section includes Start Date From/To, End Date From/To, Cancellation Reason, Date Canceled From/To, and Termination Reason/Date Terminated From/To. The 'Service Line' section includes Service Name, Standard Coverage, Bill To Account Name, Bill To Account Number, Status, Line Type, PO Number, and Line Reference. The 'Covered Level' section includes a 'Covered Level' dropdown menu, Item Name, System, and Item Instance. There are also fields for External Reference and Serial Number. Annotations with arrows point to specific elements: '1 Requires Contract Number' points to the 'Contract Number' field; '2 Party Attributes' points to the 'Party Role' dropdown; '3 Dates correspond to the contract level selected in "Display"' points to the 'Effectivity' section; and '4 Select Covered Level to hide or display other covered level search attributes' points to the 'Covered Level' dropdown.

**1 Requires Contract Number**

**2 Party Attributes**

**3 Dates correspond to the contract level selected in "Display"**

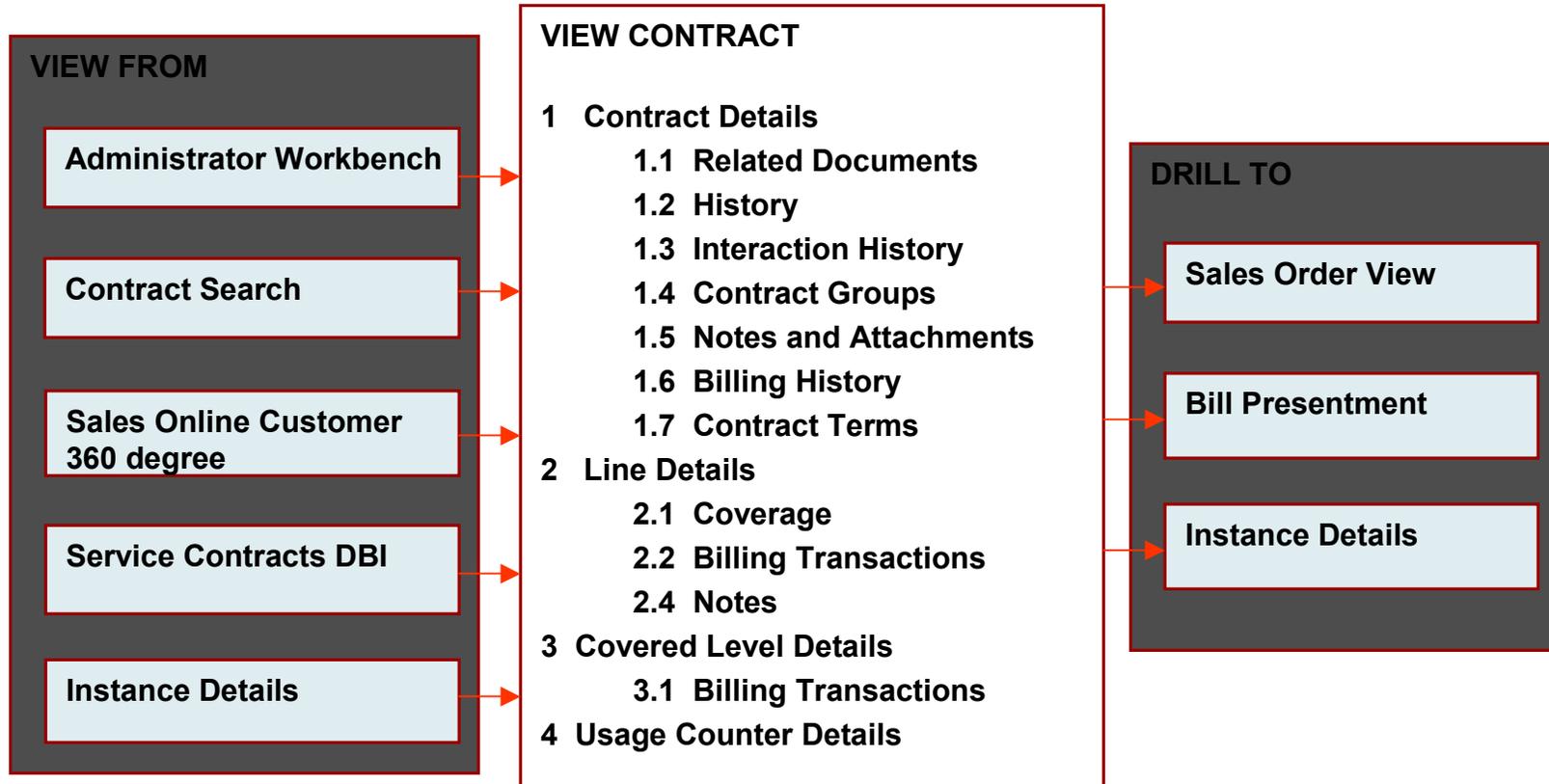
**4 Select Covered Level to hide or display other covered level search attributes**



## View Contract Details in HTML

- View Service Contract Details in HTML pages can be accessed from Administrator Workbench, Contract Search, Sales Online, Service Contracts DBI and Installed Base
- It provides all details of a contract, service line, covered level and usage counter
- It is fully integrated with Bill Presentment page and Instance Details page

# Contract Details in HTML



# HTML View

**Service Contract: 22018**  
 USD = US dollar

Operating Unit	<b>Vision Operations</b>	Status	<b>Entered</b>
Customer	<b>Business World</b>	Negotiation Status	<b>Pending Internal</b>
Party Number	<b>2813</b>	Version	<b>0.12</b>
Contract Category	<b>Subscription Agreement</b>	Price List	<b>Corporate</b>
Description	<b>Suscription Agreement</b>	Currency	<b>USD</b>
Known As		Original Amount	<b>1,320.00</b>
Price Agreement		Adjustment	<b>0.00</b>
Start Date	<b>01-Jan-2006</b>	Terminated Amount	<b>0.00</b>
End Date	<b>31-Dec-2006</b>	Canceled Amount	<b>0.00</b>
Duration	<b>1 Year</b>	Subtotal Amount	<b>1,320.00</b>
Days To Expiry	<b>248</b>	Tax	<b>0.00</b>
		Total Amount	<b>1,320.00</b>

**Select to open authoring form** → [Open](#)

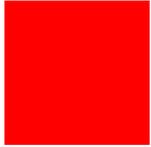
[Additional Details](#)  
[Action History](#)  
[Billing History](#)  
[Contract Terms](#)  
[Notes and Attachments](#)  
[Contract Groups](#)

[Lines](#) [Contacts](#) [Billing](#) [Sales Credits](#) [Renewals](#) [Related Documents](#) [History](#)

[Export](#)

Line	Service	Type	Status	Start Date	End Date	Duration	Period	Qty	UOM	Subtotal	Tax	Total
1	<a href="#">Monthly Vision</a>	Subscription	Entered	01-Jan-2006	31-Dec-2006	1 Year		1	Each	120.00	0.00	120.00
2	<a href="#">WR23763</a>	Service	Entered	01-Jan-2006	31-Dec-2006	1 Year				1,200.00	0.00	1,200.00
3	<a href="#">QP-LPTR-U</a>	Usage	Entered	01-Jan-2006	31-Dec-2006	1 Year				0.00	0.00	0.00

[Return to Service Contract Search](#)



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## Flexible Approval Rules

- Standard contract approval workflow integrates with Oracle Approvals Management (AME) to drive the approval process
- Standard approvals management features such as rules based approval routing, definition of approval groups are supported



## Approval Rule Setup Steps

- Create new Service Contract Attributes in AME
- Define an AME Condition based on the attributes
- Define an AME Approval Group containing approvers as members
- Define an Action in AME
- Define a Rule based on Conditions and Actions



# Create or Review Attributes

**ORACLE** Approvals Management  
Transaction Type: Service Contracts Internal Approval

Return to Dashboard Home Logout Help Preferences Diagnostics

Rules Test Workbench Setup

Attributes Conditions Action Types Approver Groups

**Attributes**

This page enables you to view attributes present in your transaction type, create new, and reuse existing attributes to specify the business components of a transaction such as total amount, a percent discount, and a person's salary.

**Search**

Attribute Category: Others  
Item Class: All  
Data Type: All

Name

Create	Use Existing A
<a href="#">Attribute</a>	
<a href="#">CONTRACT_AMOUNT</a>	
<a href="#">CONTRACT_CATEGORY</a>	
<a href="#">CONTRACT_OPERATING_UNIT</a>	
<a href="#">CURRENCY_CODE</a>	
<a href="#">CUSTOMER_PARTY</a>	

Seeded attributes available for:

- Contract ID
- Operating Unit
- Customer Party
- Contract Category
- Contract Amount

# Define Approval Condition

**ORACLE** Approvals Management  
Transaction Type: Service Contracts Internal Approval  
Return to Dashboard Home Logout Help Preferences Diagnostics

Rules | Test Workbench | Setup  
Attributes | Conditions | Action Types | Approver Groups  
Setup: Conditions >

**Create New Condition**  
\* Indicates required field

Cancel Create Another (1) Apply

Condition Type: Ordinary  
\* Attribute: CONTRACT\_AMOUNT

**Expression**  
CONTRACT\_AMOUNT is greater than 5000 and less than 25000

Condition Type can be Ordinary or Exception

Condition is CONTRACT\_AMOUNT > 5000 and less than 25,000

# Define Approval Group

Attributes | Conditions | Action Types | Approver Groups

Setup: Approver Groups >

### Create New Approver Group

\* Indicates required field

Cancel Create Another (1) Apply

\* Name Service Contracts Approval Group

\* Description Service Contracts Approval Group

\* Order Number 1

Voting Method Serial

Usage Type Static

Query

**Selected Approver for this approval group**

Dynamic Approver Group requires a SQL.

Validate

#### Group Members

Enter members for the static approver group.

Approver Type	Approver	Order Number	Delete
HR People	Able, Marsha	1	

# Define Approval Action

Rules | Test Workbench | Setup

Attributes | Conditions | Action Types | Approver Groups

### Action Types

To reinstate changed configuration details to original values click Revert.

Search

Rule Type: All [v] Go

Use Existing Action Type

Select	Name	Description	Rule Type	Order Number	Ordering Mode	Voting Method	Remove
<input checked="" type="radio"/>	<a href="#">approval-group chain of authority</a>	chain of authority includes an approval group	Chain Of Authority	1	Serial [v]	Serial [v]	

Actions: approval-group chain of authority

Action	Update	Delete
Require approval from Service Contracts Approval Grp		

Revert (1) Apply

**Action defined will be used later in the approval rule**

# Rule Using Conditions & Action

Rules Test Workbench Setup

Enter Rule Details Add Conditions Add Actions **Review**

Create New Rule: Review

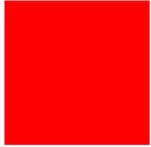
Cancel Back Step 4 of 4 Finish

Name test End Date 31-Dec-4712  
Rule Type List Creation  
Item Class Header  
Start Date 09-May-2006

Conditions		
Condition	Condition Type	Item Class
CONTRACT_AMOUNT is greater than or equal to 0	Ordinary	Header

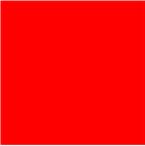
Actions	
Action Type	Action
approval-group chain of authority	Require approval from Service Contracts Approvers

Cancel Back Step 4 of 4 Finish



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## Configuration Steps

- Setup Single Sign-on Portal
- Create Communication Templates in XML Publisher
- Define Communication Template Set
- Assign Communication Template Set at site, operating unit or party levels
- Define acceptable payment methods in global contracts defaults for Online Customer Acceptance

# Online Portal

**ORACLE** Service Contracts Electronic Renewals

Pending Service Contracts

Select Contract:

Select	Contract Number	Description	Start Date	End Date	Amount	Renewal	Quote
<input type="radio"/>	Demo-2-R07-JUN-06 22:20:10	Renewals - Online	02-Aug-2006	01-Aug-2007	53,955.00 USD	✓	
<input type="radio"/>	Demo-3-R07-JUN-06 22:25:46	Renewals - Online	02-Aug-2007	01-Aug-2008	1,780,515.00 USD	✓	
<input type="radio"/>	Demo-4-R07-JUN-06 22:26:46	Renewals - Online	02-Aug-2007	01-Aug-2008	59,350.50 USD	✓	

Indicates Contract is pending assistance from salesrep.

Diagnosics Home Logout Preferences Help Personalize Page

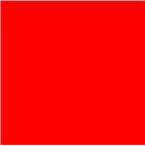
About this Page Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.

Available actions are – accept, decline and request assistance

Contracts pending salesrep assistance are marked. These contracts can be accepted or declined

Flag indicates that the pending contract is a renewal

Clicking quote displays quote in .pdf format



## Auto-Reminders

- Auto-reminder process can be used for both manual and online contracts
- Online Contracts - all contracts for which quote has been published online
- Manual Contracts - Contract Status will be used to send reminders

# Auto-Reminder Program

- Program is usually scheduled to run daily

Submit Request

Run this Request...

Name: Service Contracts AutoReminder Program

Operating Unit:

Parameters:

Contract Status:

At the:

Upon completion...  
 Save all Output Files

Layout:

Notify:

Print to: noprint

Help (C)

Submit

Cancel

Contract Status

Accepted

Approval Rejected

Complete

Entered

Incomplete

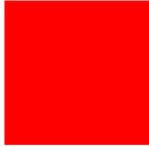
New

Passed

Quote Sent

Submitted

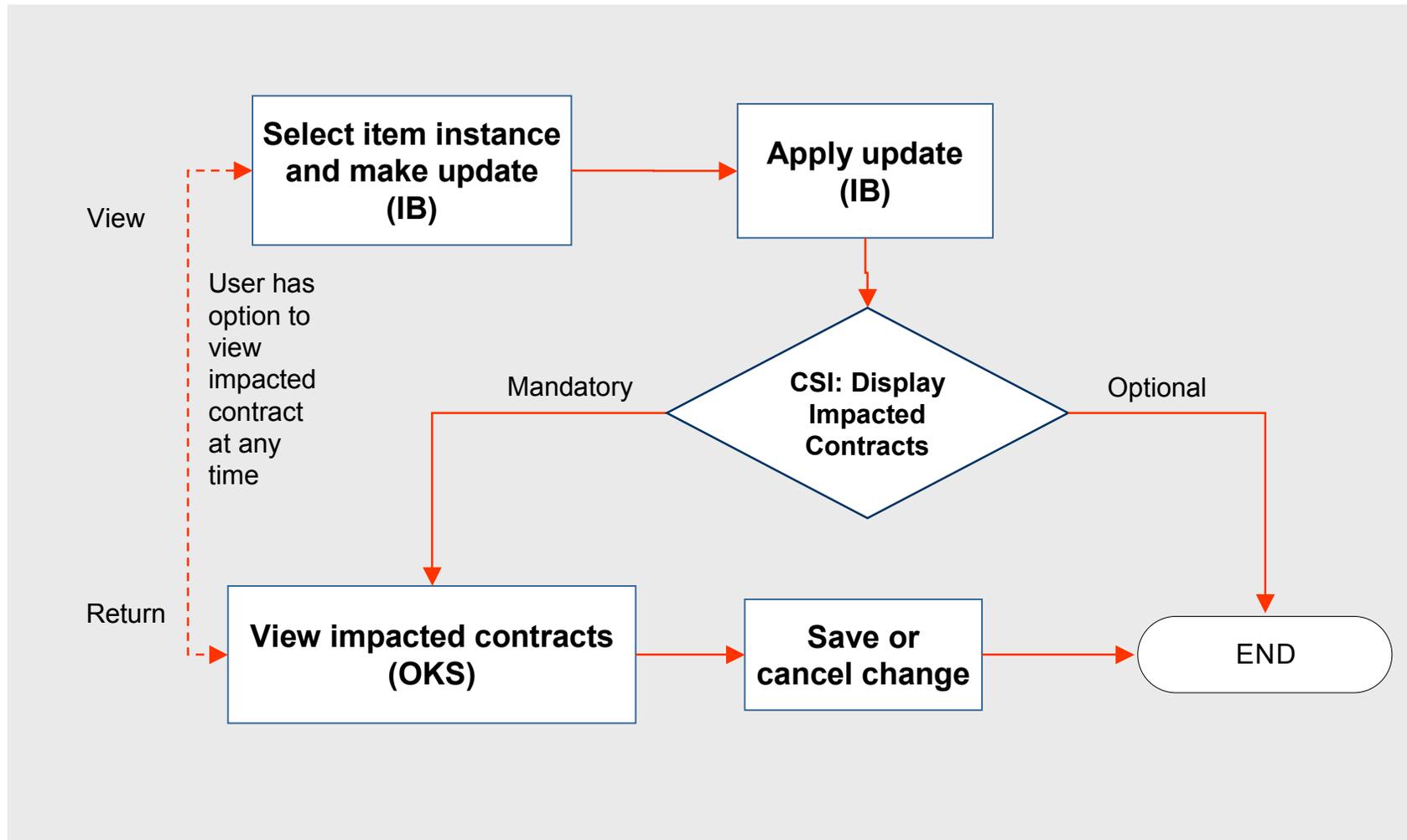
The contract status has to be specified as a parameter



# 10 Things You May Not Know

- 1 Shared Services Center Support
- 2 Contract Negotiation Lifecycle
- 3 Service Contracts Admin Workbench
- 4 Flexible Approval Rules
- 5 Enhanced Communication Templates
- 6 **Installed Base Mass Updates**
- 7 Cancellation Enhancements
- 8 Sales Contracts Workbench
- 9 Enhanced 360° Sales Contracts view
- 10 R12 Upgrade Tips

# View Impacted Contracts



# View Impacted Contracts

**ORACLE** Installed Base

Home Logout Preferences Personalize Page Diagnostics

Item Instance Counters Mass Update

Item Instances Systems Transactions Asset Assets Deployment

Item Instance: Item Instances >

Update : Item Instance : 1213703

Indicates required field

Cancel Change Owner View Impacted Contracts Save Apply

Item: ASS4888 System: [ ]  
Item Description: Sentinel Standard Desktop TPD Owner: Business World  
Account Number: 1608

General Location Associations Configuration Counters Notes

Personalize "General"

External Reference: [ ] New Version Label: [ ]  
Organization: Vision Operations Last Version Label: AS\_CREATED  
Revision: [ ] Creation Date: 31-Jan-2006 10:49:46  
Instance Name: [ ] Status: CREATED  
Quantity: [ ] Install Date: [ ]  
UOM: Each Expiration Date: [ ]  
Item Instance Type: [ ] Shipped On Date: [ ]  
Item Condition: [ ] Return By Date: [ ]  
Accounting Classification: Customer Product Actual Return Date: [ ]  
Operational Status Code: In Service

Show Instance Flex Fields Show Additional Attributes

Cancel Change Owner View Impacted Contracts Save Apply

Item Instance: Counters: Mass Update: Home: Logout: Preferences: Personalize Page: Diagnostics

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# Item Instance Updates

The screenshot shows the Oracle Item Instance Update dialog. A warning message states: "Updates to the item instance may impact the following contracts. Do you want to continue with the operation?". Below this is a table of impacted contracts. A text box explains that applying the update forces a review of these contracts. Red arrows point from the text boxes to the 'Yes' button and the 'Apply' button.

**Warning**  
Instance Number: 1430846  
Owner Name: AT&T Universal Card  
Item Description: Sentinel Standard Desktop TPD

Updates to the item instance may impact the following contracts. Do you want to continue with the operation?

Select	Contract Number	Line	Service Type	Service Name	Status	Start Date	End Date	Amount	Currency
<input checked="" type="radio"/>	22219-:01-JUN-06 04:02:58	1.1	Warranty	WR11351	Active	01-06-2006	31-05-2007	0.00	USD
<input type="radio"/>	KS-M-MU1-:01-JUN-06 04:02:56	1.1	Service	WR23763	Entered	01-06-2006	31-12-2006	294.00	USD
<input type="radio"/>	KS-M-MU2-:01-JUN-06 04:02:59	1.1	Service	WR23763	Entered	01-06-2006	31-12-2006	294.00	USD
<input type="radio"/>	KS-M-MU3-:01-JUN-06 04:03:00	1.1	Service	WR23763	Entered	01-07-2006	30-06-2007	504.00	USD

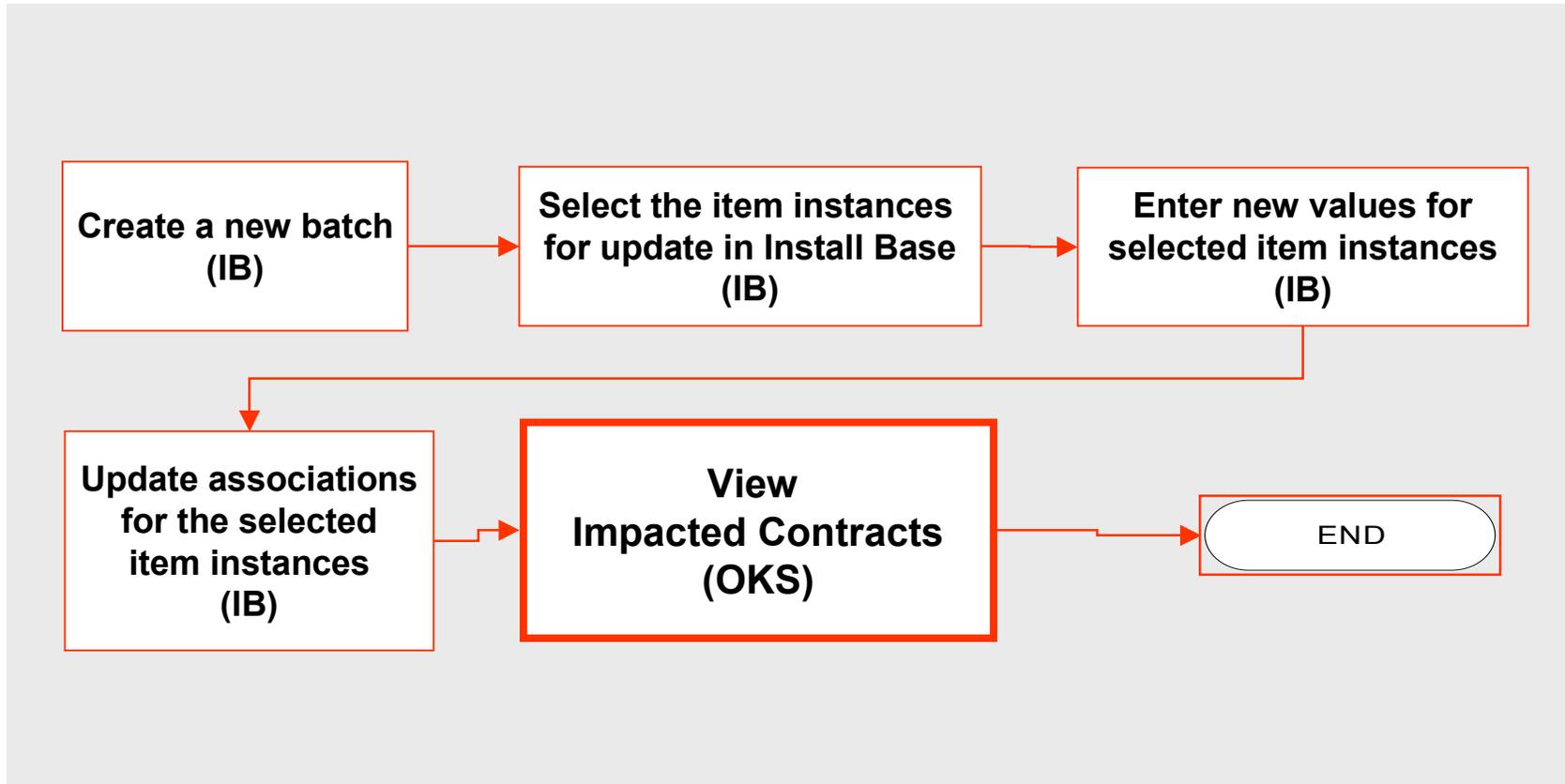
**Contract 22219-:01-JUN-06 04:02:58 , Line 1.1 : Details**  
Duration: 1 Year  
Coverage: 100% Coverage  
Service Unit Price: 0.00 USD  
Party Name: AT&T Universal Card  
Party Number: 1005  
Quantity: 1 Each  
Card: SONVILLE States

**Contacts**  
Role: No contacts exist

**Buttons:** Cancel, Change Owner, View Impacted Contracts, Save, **Apply**

**Text Boxes:**  
1. "Yes' to proceed with change; 'No' to cancel" (points to No/Yes buttons)  
2. "Applying update to item instance forces a review of Impacted Contracts before changes can be saved" (points to Apply button)

# IB Mass Updates – View Impact



# View Impacted Contracts

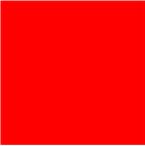
Display Options  
- Contracts  
- Service Lines  
- Covered Levels

The screenshot shows the Oracle Contract Options interface. At the top, there are navigation buttons: "Item Instance", "Counters", "Miss Update", "Contract Options", and "Schedule". The "Contract Options" button is highlighted with a red box. Below this, there are tabs for "Select Item Instances", "Enter New Values", "Update Associations", and "Schedule". The main content area is titled "Batch (Transfer Owner) : Contract Options" and contains various form fields for "Transfer Option", "Billing Profile", "Modifier", "Contract Status", "Credit Option", "Termination Reason", and "Bill Transferred Services". Below these fields are "Ship To" details for two customers. At the bottom, there is a table titled "Impacted Contracts" with columns for "Contract", "Status", "Start Date", "End Date", "Amount", "Billed Amount", "Transfer Amount", "Credit Amount", "Currency", and "Date Terminated". A red arrow points from the text box to the first row of this table.

Select	Contract	Status	Start Date	End Date	Amount	Billed Amount	Transfer Amount	Credit Amount	Currency	Date Terminated
<input type="radio"/>	KS-MMMU1-01-JUN-06 04:02:56	Entered	01-06-2006	31-12-2006	204.00	0.00	206.61	0.00	USD	
<input type="radio"/>	22219-01-JUN-06 04:02:58	Active	01-06-2006	31-05-2007	0.00	0.00	0.00	0.00	USD	04-07-2006
<input type="radio"/>	KS-MMMU3-01-JUN-06 04:03:00	Entered	01-07-2006	30-06-2007	504.00	0.00	416.55	0.00	USD	
<input type="radio"/>	KS-MMMU2-01-JUN-06 04:02:59	Entered	01-06-2006	31-12-2006	294.00	0.00	206.61	0.00	USD	

Line	Service Type	Service Name	Status	Start Date	End Date	Amount	Billed Amount	Transfer Amount	Credit Amount
1	Service	VR22763	Entered	01-06-2006	31-12-2006	294.00	0.00	206.61	0.00



## Specify Impact of IB Mass Updates

- Specify service transfer option for mass changes of item instance ownership:
  - No Update to Contracts
  - Terminate
  - Transfer & Terminate
  - Use Coverage Terms
- Specify credit option for service termination due to mass item instance termination

# Mass Transfer: Terminate

ORACLE® Installed Base

Home Logout Preferences Diagnostics

Item Instance Counters **Mass Update**

Select Item Instances Enter New Values Update Associations **Contract Options** Schedule

**Create Batch (Transfer Owner) : Contract Options**

Batch Name **Gun-T1**

Current Owner Type **Party**

Owner **AT&T Universal Card**

Owner Account Number **1005**

New Owner Type **Party**

Owner **Business World**

Owner Account Number **4429**

Transfer Date **04-07-2006 14:53:23**

Cancel Save For Later Back Step 4 of 5 Next

**Contract Rules**

Transfer Option **Terminate**

Credit Option **Calculated**

Termination Reason

**Impacted Contracts**

Display Contract Go

Select	Contract	Status	Start Date	End Date	Amount	Billed Amount	Credit Amount	Currency	Date Terminated
<input checked="" type="radio"/>	KS-M-MU1-:01-JUN-06 04:02:56	Entered	01-06-2006	31-12-2006	294.00	0.00	0.00	USD	
<input type="radio"/>	22219-:01-JUN-06 04:02:58	Active	01-06-2006	31-05-2007	0.00	0.00	0.00	USD	04-07-2006
<input type="radio"/>	KS-M-MU3-:01-JUN-06 04:03:00	Entered	01-07-2006	30-06-2007	504.00	0.00	0.00	USD	
<input type="radio"/>	KS-M-MU2-:01-JUN-06 04:02:59	Entered	01-06-2006	31-12-2006	294.00	0.00	0.00	USD	

**Contract KS-M-MU1-:01-JUN-06 04:02:56: Lines**

Line	Service Type	Service Name	Status	Start Date	End Date	Amount	Billed Amount	Credit Amount
1	Service	WR23763	Entered	01-06-2006	31-12-2006	294.00	0.00	0.00

# Mass Termination: Credit Option

Home Logout Preferences Personalize Page Diagnostics

Item Instance Counters **Mass Update**

Select Item Instances Enter New Values **Contract Options** Schedule

**Create Batch (Terminate) : Contract Options**

Batch Name **Gun\_ter1**    Step 3 of 4

**Contract Rules**  
Personalize "Contract Rules"

Credit Option    
Termination Reason

**Impacted Contracts**

Display

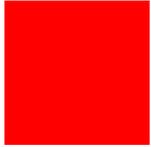
Select	Contract	Status	Start Date	End Date	Amount	Billed Amount	Credit Amount	Currency
<input checked="" type="radio"/>	KS-MU-Trans4	Active	02-16-2006	02-15-2007	504.00	0.00	0.00	USD
<input type="radio"/>	22012	Active	02-17-2006	02-16-2007	0.00	0.00	0.00	USD

**Contract KS-MU-Trans4: Lines**

Line	Service Type	Service Name	Status	Start Date	End Date	Amount	Billed Amount	Credit Amount
1.	Service	WR23763	Active	02-16-2006	02-15-2007	504.00	0.00	0.00

Personalize Header : (MassUpdateContractsRN.hiddenLayoutRN)

Step 3 of 4



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# Line Level Cancellation

Highlight Service Line or Covered Level and select 'Change Status' from Tools menu

The screenshot shows the Oracle Applications interface for a contract. The 'Tools' menu is open, and 'Change Status' is highlighted. The contract details include:

- Version: 0.5
- Status: Entered
- Start Date: 31-JAN-2006
- End Date: 30-JAN-2007
- Duration: 1
- Period: Year
- Category: Service Agreeme
- Subtotal: 1,000.00 USD
- Tax: 0.00
- Total: 1,000.00

Line	Level	Name	Serial Num	Status	Line Ref	Start Date	End Date
1.1	Party	Suma and Co		Entered		31-JAN-2006	30-JAN-2007

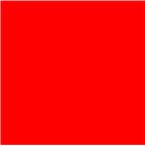
Additional details at the bottom of the screen:

- Description: 86825
- Invoice Text: Service\_Item::66825:31-JAN-2006:30-JAN-2007

# Line Level Cancellation

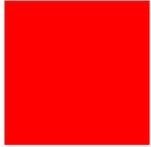
- Service line status updated to canceled
- Cancellation Amount, Date & Reason displayed

Line	Type	Name	Status	Qty	UOM	Renewal Type	Cancellation Amount	Date	Reason
1	Service	WR23763	Entered			Full Duration	400.00		
2	Service	WR23764	Canceled			Full Duration	1,200.00	06-SEP-2006	Customer Product



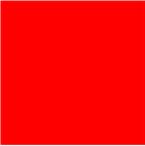
## Line Level Cancellation

- Canceled lines can be changed back to an Entered status
- Service automatically cancels when covered products are transferred, terminated, returned or replaced in IB
- View amount, date & reason canceled in authoring form
- Canceled lines remain on contract after activation. Canceled lines are not carried forward when contract renews



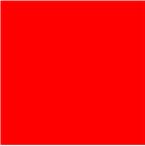
# 10 Things You May Not Know

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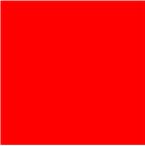
## Sales Contracts Workbench Description

- Sales Contracts Workbench is a configurable portal that provides contract administrators:
  - Easy access to all their contracts via bookmarks and user-created views
  - Simple and advanced search capabilities for adhoc queries or reporting
  - Launch pad for all contract activities. For instance, users can create sales order, sales agreements or quotes directly from the workbench obviating the need to switch responsibilities to perform these tasks
  - Supports configuration of user security privileges providing or restricting access to features based on customers' specific business needs



## Sales Contracts Workbench Benefits

- Global Contracts Access:
  - Provides business centralized access to view and manage its enterprise-wide contracts without having to switch responsibilities to access different operating units
- Enables adhoc reporting:
  - The search and analytical query tools aids tactical and operational decision making based on analysis of products and services in contract and monitor status of current contractual obligations
- Enables informed decision making by allowing administrators to stay on top of their contracts
  - Provides contract administrators real-time information on contracts requiring approval, contracts in negotiation, contracts with outstanding commitments, etc



## Sales Contracts Workbench Setup – Prerequisites

- You must be setup as an employee to access this feature
- Multi-org access control (MOAC) must be setup to determine which operating units can be accessed from the Workbench. If it is not setup, you can still access this feature for a single operating unit

# Sales Contracts Home Page

The screenshot shows the Oracle Sales Contracts Home Page. At the top, there is a search bar with a dropdown menu set to 'Number' and a 'Go' button. Below the search bar, there are sections for 'Notifications', 'My Contracts', 'My Sales Agreements', and 'Recent Contracts'. A 'Shortcuts' panel is located on the right side of the page.

**Quick search of enterprise-wide contracts**: This callout points to the search bar at the top of the page.

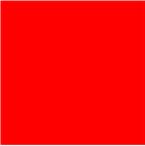
**Work list of all to-do notifications**: This callout points to the 'Notifications' section, which displays a list of notifications with columns for 'From', 'Subject', 'Sent', and 'Due'. The 'From' column shows 'SYSADMIN SYSADMIN' for the first two entries.

**Shortcuts to access other contract functions (Create contracts, clause analysis, etc.)**: This callout points to the 'Shortcuts' panel on the right, which lists various actions such as 'Create Sales Agreement', 'Create Sales Order', 'Create Repository Contract', 'Analyze Contract Clauses', 'View Bookmarks', 'Import Contracts', 'Assign Contract Administrator', and 'Download Import Template'.

**My Contracts**: This section displays a table of contracts with columns for 'Name', 'Customer', and 'Status'. The table contains several rows of contract data, including 'AM Sales Agreement' and 'Credit Agreement'.

**My Sales Agreements**: This section displays a table of sales agreements with columns for 'Name', 'Customer', 'Status', 'Type', 'Activation Date', 'Expiration Date', 'Min Amount', 'Agreed Currency', 'Unfilled Amount', and 'View Contract'. The table currently shows 'No Contracts found'.

**Recent Contracts**: This section displays a table of recent contracts with columns for 'Contract Number', 'Contract Name', 'Operating Unit', 'Document Type', 'Status', 'Last Updated By', 'Last Update Date', and 'Update'. The table contains two rows of contract data.



## Sales Contracts Workbench – Seeded Contract Bins

- My Contracts
  - Displays all the contracts for which you are the contract administrator (agreements, quotes and orders)
  - Use seeded views to display contracts in draft status or in pending approval status
- My Sales Agreements
  - Focuses on agreements you are the administrator for
  - Use seeded views to display agreements in draft status, in expired status or those about to expire in the next **60** days and agreements with outstanding commitments > **\$100,000**
- Recent Contracts
  - Displays all contracts that you have viewed or accessed from the Workbench
- All Contracts
  - Users must personalize this bin and create their own views to generate required information for analysis

# Sales Contracts Workbench – Simple Search

## Contracts

Search

Advanced Search

Document Type:

Number:

Name:

Customer:

Customer Number:

Select Contract: Actions    Previous 1-10 Next 10

Select	Number	Name	Document Type	Customer	Status	Type	Amount	Currency	Customer Number	Salesperson	Contract Administrator	Contract Template	Customer PO Number	Days To Expire	Operating Unit	View Contract
<input type="radio"/>	<a href="#">1</a>	1	Sales Agreement	Business World	Active	BlanketXB3		USD	1608			kk-vosell1			Vision Operations	
<input type="radio"/>	<a href="#">10000</a>	10000	Sales Agreement	Business World	Pending Internal Approval	OKC-BSA Neg Flow		USD	1608			Vision Operations Blanket Sales Agreement Terms			Vision Operations	
<input type="radio"/>	<a href="#">10001</a>	10001	Sales Agreement	Business World	Pending Internal Approval	OKC-BSA Neg Flow		USD	1608			OKC-SellSide-Template			Vision Operations	

### – Simple search

- Allows you to search for different types of contracts such as sales agreements, quotes etc
- Search using any combination of criteria including, Contract Name, Number, Customer Name or Number
- Allows you to open and update the contract or simply view the PDF document

# Sales Contracts Workbench – Advanced Search

Contracts

Advanced Search Simple Search

Document Type: --Sales Agreement

General Information

Number	<input type="text"/>	Customer PO Number	<input type="text"/>
Name	<input type="text"/>	Customer	<input type="text"/>
Sales Agreement Type	<input type="text"/>	Customer Number	<input type="text"/>
Operating Unit	Vision Operations	Customer Contact	<input type="text"/>
Salesperson	<input type="text"/>	Currency	<input type="text"/>
Contract Administrator	<input type="text"/>	Min Amount Agreed From	<input type="text"/>
Status	<input type="text"/>	Min Amount Agreed To	<input type="text"/>
User Status	<input type="text"/>	Max Amount Agreed From	<input type="text"/>
Activation Date From	<input type="text"/>	Max Amount Agreed To	<input type="text"/>
Activation Date To	<input type="text"/>	Expiration Date From	<input type="text"/>
Item	<input type="text"/>	Expiration Date To	<input type="text"/>
Contract Template	Vision Operations Blanket	Termination Date From	<input type="text"/>

Exclude Expired Sales Agreements  
 Contains Contract Terms

Go Clear

Select Contracts: Actions Update Contract Terms   Previous 1-10 Next 10

Select	Number	Name	Customer	Status	Sales Agreement Type	Activation Date	Expiration Date	Customer Number	Salesperson	Contract Administrator	Contract Template	Customer PO Number	Days To Expiry	Operation Link	View Contract
<input type="radio"/>	1013		Hilman and Associates	Draft - Internal Rejected	BSA with Approvals	17-Oct-2004		1004			Vision Operations Blanket Sales Agreement Terms			Vision Operations	<input type="button" value="pdf"/>
<input type="radio"/>	1014		Hilman and Associates	Draft	BSA with Approvals	17-Oct-2005		1004			Vision Operations Blanket Sales Agreement Terms			Vision Operations	<input type="button" value="pdf"/>
<input type="radio"/>	1016			Draft	BSA with Approvals	19-Oct-2005					Vision Operations Blanket Sales Agreement Terms			Vision Operations	<input type="button" value="pdf"/>

- Allows search based on criteria sensitive to the document type you are searching on across one or many operating units
- Search using a combination of criteria: Customer, Status, Date ranges, contract template etc
- You can drilldown to contract details from search results to update the contract or simply view the PDF document

# Sales Contracts Workbench - Details Drilldown

Enabled based on function security defined in Quoting or Order Management

ORACLE Co

Home Logout Help Preferences Personalize Page Diagnostics

Contracts >

Logged In As OPERATIONS

**Sales Agreement: 1013.0**

USD=US dollar  
 Indicates term is enforced on orders

View Contract Update Update Contract Terms Add Bookmark

**General Information**

Sales Agreement Name	1013	Customer	Hilman and Associates
Sales Agreement Type	BSA with Approvals	Customer Number	1004
Activation Date	17-Oct-2004	Customer Contact	
Expiration Date		Currency	USD
Status	Draft - Internal Rejected	Operating Unit	Vision Operations

[Show Additional Information](#)

**Fulfillment Summary**

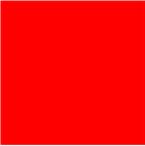
Min Amount Agreed	Returned Amount
Max Amount Agreed	In Process Amount
Fulfilled Amount	Unfulfilled Amount
Released Amount	Unreleased Amount

Lines Pricing Contract Terms Contract Documents

Line	Item Context	Item	Description	Activation Date	Expiration Date	UOM	Unfulfilled Amount	Qty Unfulfilled
<a href="#">1</a>	Internal Item Number	CVMI1	Customer VMI (Min Max days)	17-Oct-2004		Ea		
<a href="#">2</a>	Internal Item Number	CVMI2	Customer VMI (Min Max qty)	17-Oct-2004		Ea		
<a href="#">3</a>	Internal Item Number	CVMI3	Min qty - fixed qty	17-Oct-2004		Ea		
<a href="#">4</a>	Internal Item Number	CVMI4	Min days - fixed qty	17-Oct-2004		Ea		

[Return to Contracts - Advanced Search](#)

View Contract Update Update Contract Terms Add Bookmark



## Contract Actions from the Workbench



- From the home page, you can:
  - Create contracts including quotes, agreements and orders
  - Create sell intent repository contracts
  - Analyze contract clause usage
  - Import legacy contracts into the repository
  - Mass update administrators on contracts

# Assign Contract Administrator

The screenshot shows the Oracle 'Assign Contract Administrator' web interface. The page title is 'Assign Contract Administrator' and the user is logged in as 'OPERATIONS'. The interface is divided into two main sections: 'Contracts for Update' and 'Assignment Details'.

**Contracts for Update:**

Document Types	Quote
Customer	Business World
Contract Administrator	Stock, Ms. Pat
Operating Unit	Vision Operations
Salesperson	
Sales Group	

**Assignment Details:**

New Contract Administrator:  Assign from Sales Team in Quote  
 Select Manually

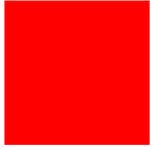
\* Contract Administrator: Abbott, Mr. John

Action: Update

Schedule:  As soon as possible  
 Start at specific date and time

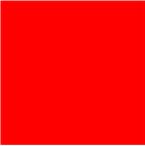
\* Start Time: 27-Apr-2006 16:28:32  
(example: 26-Apr-2006 19:45:00)

- Allows you to assign or update contract administrators on multiple contracts en masse
- You can update specific contracts based on additional criteria (document type, customer, operating unit, etc)
- You could run a report to first view the contracts that would be affected by this change before updating the contracts



# 10 Things You May Not Know

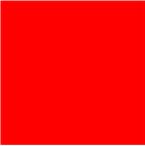
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## Access Contracts from Sales Online

### Description

- Access to contracts from Sales Online
  - Release 12 enhances the existing 360° view by providing additional views that display active sales agreements and all existing contracts for a given customer
  - Sales Managers, through Sales Online, can now view details of specific contracts including the signed contract documents and if necessary download them from the central repository



## Access Contracts from Sales Online Benefits

- Increase information access and improves contract efficiency for decision making
  - By providing easy access to contracts for a customer, sales managers can track outstanding commitments, past performance and make better negotiation decisions
  - Enabling sales managers to view all contract documents including signed documents to understand what has been negotiated to help manage ongoing deals better
- Facilitates better customer interactions
  - With information on customer contracts easily available, any customer queries or clarifications can be provided quicker enhancing customer serviceability

# Access Contracts from Sales Online Process – Customer View from Sales Dashboard

## Sales Dashboard

**Sales Funnel**  
TIP Place cursor on a sales stage to view the total pipeline for that stage. Amount displayed is in user's default currency. Click the stage to view the related opportunities.

Sales Cycle → Prospect → Qualify → Propose → Close

**Shortcuts**

- Calendar
- Customers
- Sales
- Campaigns
- Forecast
- Leads
- Opportunities
- Tasks
- Quotes
- Proposals
- Contacts
- Commission Statement
- Reports
- Proposals
- Quotes
- Year to Date Summary
- Reports

**Latest Submitted Forecast**  
No data exists.

## Customers

**Simple Search**

Name  Registry ID   
DUNS Number  Web Site   
Account Number  Taxpay

Name	Registry ID	DUNS Number	Address
<a href="#">Business World</a>	2813		Stankiewiczza, 188, 3, 50-550 Warszawa, POLAND

Access contract information through the 'Customers' search

Click the 'Name' to view customer details including their contracts

# Access Contracts from Sales Online Process – View Sales Contracts and Sales Agreements

Use the 'Business Activities' bin to view contract details

Number	Document Type	Status	Activation or Booked Date	Expiration Date	Amount	Contract Administrator	View Contract
<a href="#">65585</a>	Sales Order	Booked	03/May/2006		435.00	EBUSINESS	
<a href="#">65584</a>	Sales Order	Booked	03/May/2006		15.00		
<a href="#">65412</a>	Sales Order	Booked	24/Apr/2006		15.00	EBUSINESS	
<a href="#">65330</a>	Sales Order	Booked	19/Apr/2006		11.25		
<a href="#">65306</a>	Sales Order	Booked	19/Apr/2006		562.47		

Click the 'Number' link to view more contract detail

Number	Name	Activation Date	Min Amount Agreed	Fulfilled Amount	In Process Amount	Currency	View Contract
<a href="#">1078</a>	1078					USD	
<a href="#">1077</a>	Master Services Agreement	ec/2008	10,000.00			USD	
<a href="#">1076</a>	1076	Draft 01/May/2006				USD	
<a href="#">1075</a>	1075	Draft 28/Apr/2006				USD	
<a href="#">1074</a>	Master Services Agreement for Business World	Draft 01/Jan/2006 31/Dec/2007				USD	

- You can either view all your sales agreements or all your contracts including agreements and orders
- You can personalize these bins to include additional fields. For instance for Sales Agreements, fields include Blanket Type, Customer PO Number, Salesperson, User Status, etc,

# Access Contracts from Sales Online Process – View Contract Details

Sales Agreement: 1078, 0

USD=US dollar

 Indicates term is enforced on orders

[View Contract](#)

General Information			
Sales Agreement Name	1078	Customer	Business World
Sales Agreement Type	BSA with Approvals	Customer Number	1608
Activation Date	02/May/2006	Customer Contact	
Expiration Date		Currency	USD
Status	Draft	Operating Unit	Vision Operations

[Show Additional Information](#)

Fulfillment Summary			
Min Amount Agreed		Returned Amount	
Max Amount Agreed		In Process Amount	
Fulfilled Amount		Unfulfilled Amount	
Released Amount		Unreleased Amount	

Lines	Pricing	Contract Terms	Contract Documents					
Line	Item Context	Item	Description	Activation Date	Expiration Date	UOM	Unfulfilled Amount	Qty Unfulfilled
<a href="#">1</a>	Internal Item Number	AS54888	Sentinel Standard Desktop TPD	02/May/2006		Ea		
<a href="#">2</a>	Internal Item Number	AS54999	Sentinel Standard Desktop - Rugged	02/May/2006		Ea		
<a href="#">3</a>	Internal Item Number	AS54111	Sentinel Standard Desktop - TP	02/May/2006		Ea		
<a href="#">4</a>	Internal Item Number	AS54555	Sentinel Standard Desktop TPD - Cat II	02/May/2006		Ea		

- You can view basic details about the contract including the customer, effective dates, current status, amount agreed (min and max), fulfilled amount etc
- View current fulfillment status of each line as shown here. You can drilldown further for item-level details

# Access Contracts from Sales Online Process – View Contract Details

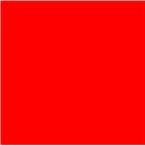


The screenshot shows the Oracle Contract Terms interface. At the top, there are tabs for 'Lines', 'Pricing', 'Contract Terms', and 'Contract Documents'. The 'Contract Terms' tab is active. Below the tabs, there is a header section with 'Authoring Party Internal', 'Contract Source Structured Terms', and 'Contract Template Vision Operations Blanket Sales Agreement Terms'. A red box highlights the 'Contract Terms' tab and the header information. Below the header, there are links for 'Expand All' and 'Collapse All'. A table with columns 'Focus Title', 'Non-Standard', 'Mandatory', and 'Contract Expert' is displayed. The table contains several rows of contract terms, including 'Contract Terms', 'I. Definitions', '1. Affiliate Term', '2. User Definition', 'II. Term of Agreement', '1. Term of Agreement', 'III. Payment & Taxes', '1. Payment Terms', and '2. Taxes Due'. A red box highlights the 'Contract Terms' row and the '2. Taxes Due' link. A red box also highlights the '2. Taxes Due' link in the table. A red box highlights the '2. Taxes Due' link in the table.

Focus Title	Non-Standard	Mandatory	Contract Expert
Contract Terms			
I. Definitions			
1. Affiliate Term		✓	
2. User Definition		✓	
II. Term of Agreement			
1. Term of Agreement			
III. Payment & Taxes			
1. Payment Terms			
2. Taxes Due			

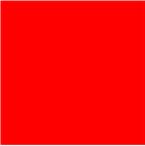
View Contract Terms information including the template used to create the contract and all section and clause details

Click any of the links to view clause or section details



# 10 Things You May Not Know

- 1 Shared Services Center Support
- 2 Contract Negotiation Lifecycle
- 3 Service Contracts Admin Workbench
- 4 Flexible Approval Rules
- 5 Enhanced Communication Templates
- 6 Installed Base Mass Updates
- 7 Cancellation Enhancements
- 8 Sales Contracts Workbench
- 9 Enhanced 360° Sales Contracts view
- 10 **R12 Upgrade Tips**

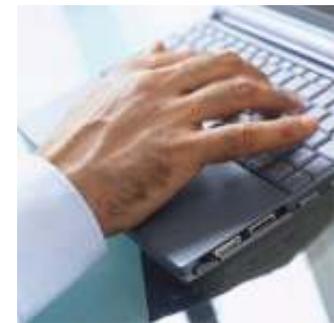


## R12 Upgrade Insight

- Prior to Oracle Applications 11.5.10, Oracle Service Contracts uses a set of Rules and Time Values tables to store contract attributes that were not included in base Oracle Core Contracts or Oracle Service Contracts header and lines tables. This storage approach resulted in data volume and performance issues for some customers.
- From Release 11.5.10, Service Contracts has been re-architected to eliminate the rules and time values generic data structures. Service Contracts now stores the relevant attributes in specific OKS/OKC tables and columns, better leveraging Oracles database technology and delivering higher performance with lower data volumes.
- R12 has introduced Multi-Org Access Control, Contract Lifecycle Management using new workflow process (OKSPRCS) and Oracle E-Business Tax support. Upgrade programs synch the data to R12 schema.

## Upgrade Steps For Releases Before 11.5.10

1. Assess Volume, Validate and Correct Data Types
2. Apply Pre-Upgrade Data Model Changes
3. Apply Rules Bulk Data Processor
4. Reprocess Errors and Synchronize New Records
5. R12 Upgrade
6. Reprocess Errors and Synchronize New Records
7. Run R12 Post Upgrade Programs



## Step 1 – Assess Data Volumes

- Check number of lines in OKC\_K\_LINES\_B. If more than 500,000 then follow Steps 1-4, otherwise start from Step 5
- Apply Patch 4684603 .
- Get Service Contracts Validate Rule Data concurrent program and Rules Migration Utility form as a result of the patch.



## Step 2 –Data Model Change

- Apply Patch 3335269
- OKS\_RULE\_REPROCESS stores error data, if any
- Rule attributes are migrated from OKC\_RULES\_B table to:
  - OKC\_K\_HEADERS\_ALL\_B
  - OKS\_K\_HEADERS\_ALL\_B
  - OKC\_K\_LINES\_B
  - OKS\_K\_LINES\_B
  - OKS\_K\_LINES\_TL



## Step 3 - Apply Rules Bulk Data

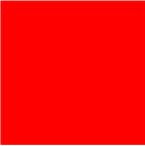
- Apply Patch 5212775
- Processes large volumes of Rules data efficiently.
- If the processing encounters any data type validation error, the entire transaction set is rolled back and will need to be corrected in Step 4.



## Step 4 - Reprocess Errors

- Submit Service Contracts Reprocess/Synchronize rule data concurrent program
- View and correct errors, if any, in Rules Migration Utility Form





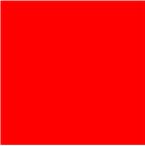
## R12 Post Upgrade Programs

- Ensure the following R12 Upgrade Programs complete successfully to upgrade your data to R12 schema:
  - Launch Process Workflow for existing Service Contracts
  - Service Contracts Update Base Annualized Factor Manager
  - Service Contracts Update History Annualized Factor Manager
  - Service Contracts eBTax Migration
  - Service Contracts ASO Queue Migration
  - Service Contracts Update Base Tax Columns Manager
  - Service Contracts Update History Tax Columns Manager
  - Create Contract Header Text Index

## Key Benefits of Implementing R12 Features

- Increase Support Revenue
- Reduce Contract Leakage
- Increase Sales Efficiency
- Increase Customer Satisfaction
- Improve Information and Reporting Capabilities
- Maximize Sales Person Performance





## Key Takeaways For R12 Adoption

- R12 Sales & Service Contracts now meets the needs of global organizations having shared service centers
- R12 Sales & Service Contracts have more user friendly HTML forms for transactions and search
- R12 Sales & Service Contracts enhances your customer interaction experience
- R12 Sales & Service Contracts improves operational efficiency
- R12 Sales & Service Contracts is easy to upgrade and provides a launch pad for Oracle Fusion



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