

Service Contract Electronic Renewals

Setup and Process

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Oracle's Service Contracts Electronic Renewals process automatically renews a contract a specified period in advance of its expiration and sends an email with a quote attachment to the customer. Both the email and the quotation, which are XML reports, can be modified to suit the client's needs.

The email sent to the customer contains a user name and password that allows them to log on to the Oracle application and either accept or decline the renewal quote. During acceptance, they can provide payment information (credit card number, PO etc.) prior to confirming.

Upon confirmation of acceptance, a notification is sent to the Contract Administrator and the renewed contract is updated with payment information. The Administrator then approves and signs the contract and the customer is billed.

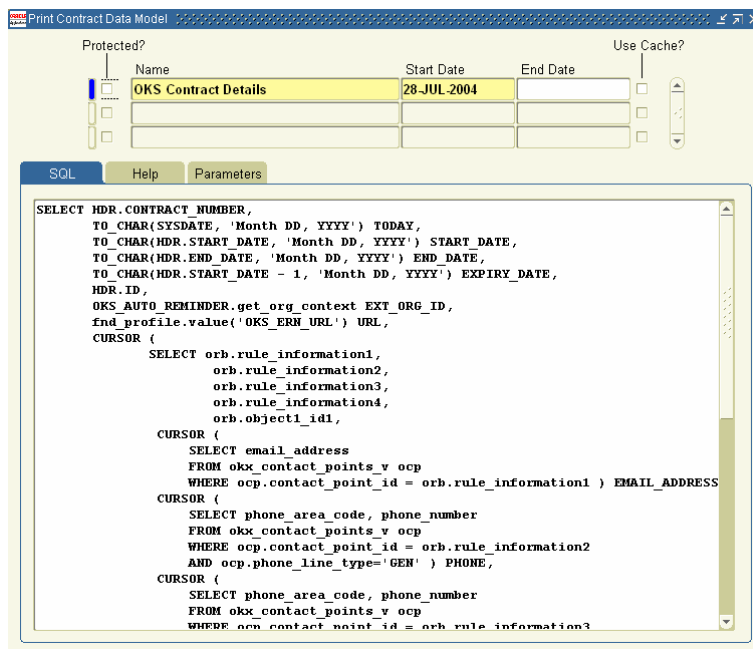
Set Up

Create Queries and Stylesheets

Queries and stylesheets are the basis for the XML reports that are used for email letters and quotations. The application does not come seeded with either, but examples provided in the Vision instance can be cut and pasted and then modified to suit a client's needs.

Service Contracts Manager > Setup > Contracts > OKC Print Contract Setup > Query

Define Cover Letter and Contract Details queries as below:



The text of this SQL query is:

```

SELECT HDR.CONTRACT_NUMBER,
       TO_CHAR(SYSDATE, 'Month DD, YYYY') TODAY,

```

```

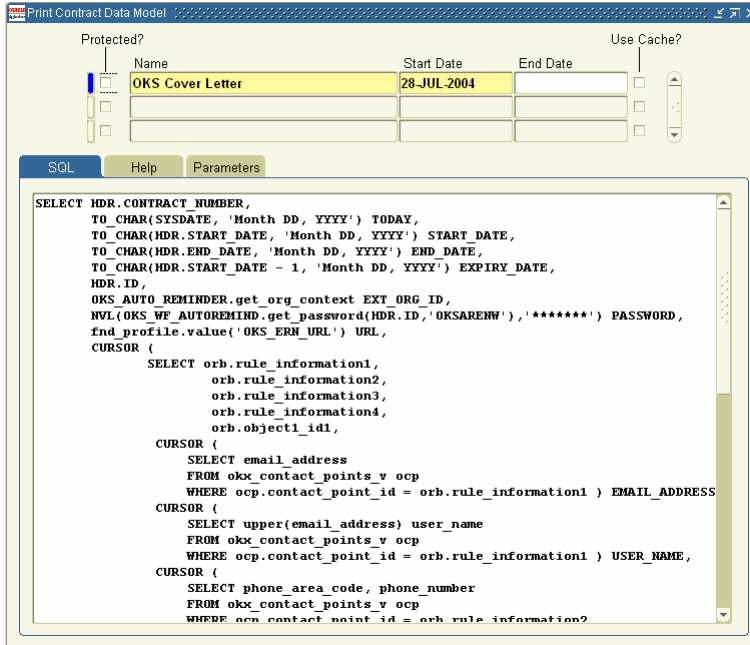
TO_CHAR(HDR.START_DATE, 'Month DD, YYYY') START_DATE,
TO_CHAR(HDR.END_DATE, 'Month DD, YYYY') END_DATE,
TO_CHAR(HDR.START_DATE - 1, 'Month DD, YYYY') EXPIRY_DATE,
HDR.ID,
OKS_AUTO_REMINDER.get_org_context EXT_ORG_ID,
fnd_profile.value('OKS_ERN_URL') URL,
CURSOR (
    SELECT orb.rule_information1,
           orb.rule_information2,
           orb.rule_information3,
           orb.rule_information4,
           orb.object1_id1,
    CURSOR (
        SELECT email_address
        FROM okx_contact_points_v ocp
        WHERE ocp.contact_point_id = orb.rule_information1 )
EMAIL_ADDRESS,
    CURSOR (
        SELECT phone_area_code, phone_number
        FROM okx_contact_points_v ocp
        WHERE ocp.contact_point_id = orb.rule_information2
        AND ocp.phone_line_type='GEN' ) PHONE,
    CURSOR (
        SELECT phone_area_code, phone_number
        FROM okx_contact_points_v ocp
        WHERE ocp.contact_point_id = orb.rule_information3
        AND ocp.phone_line_type='FAX' ) FAX,
    CURSOR (
        SELECT address1,
               address2,
               address3,
               address4,
               city,
               postal_code,
               state
        FROM okx_cust_sites_v ocs
        WHERE ocs.id1 = orb.rule_information4 ) ADDRESS,
    CURSOR (
        SELECT occ.name as CONTACT_NAME,
               hp.party_name as PARTY_NAME
        FROM okx_cust_contacts_v occ , hz_parties hp
        WHERE occ.id1 = orb.object1_id1
        AND occ.party_id = hp.party_id ) CONTACT
FROM okc_rules_b orb, okc_rule_groups_b org
where orb.rgp_id = org.id
and org.chr_id = HDR.ID

```

```

AND org.cle_id IS NULL
AND orb.rule_information_category = 'QTO') INFO
FROM OKC_K_HEADERS_B HDR
WHERE HDR.ID = :ID

```



The text of this query is:

```

SELECT HDR.CONTRACT_NUMBER,
       TO_CHAR(SYSDATE, 'Month DD, YYYY') TODAY,
       TO_CHAR(HDR.START_DATE, 'Month DD, YYYY') START_DATE,
       TO_CHAR(HDR.END_DATE, 'Month DD, YYYY') END_DATE,
       TO_CHAR(HDR.START_DATE - 1, 'Month DD, YYYY') EXPIRY_DATE,
       HDR.ID,
       OKS_AUTO_REMINDER.get_org_context EXT_ORG_ID,
       NVL(OKS_WF_AUTOREMIND.get_password(HDR.ID,'OKSARENW'),'*****')
PASSWORD,
       fnd_profile.value('OKS_ERN_URL') URL,
       CURSOR (
         SELECT orb.rule_information1,
                orb.rule_information2,
                orb.rule_information3,
                orb.rule_information4,
                orb.object1_id1,
         CURSOR (
           SELECT email_address
           FROM okx_contact_points_v ocp
           WHERE ocp.contact_point_id = orb.rule_information1 ) EMAIL_ADDRESS,
         CURSOR (
           SELECT upper(email_address) user_name
           FROM okx_contact_points_v ocp
           WHERE ocp.contact_point_id = orb.rule_information1 ) USER_NAME,
         CURSOR (
           SELECT phone_area_code, phone_number
           FROM okx_contact_points_v ocp
           WHERE ocp.contact_point_id = orb.rule_information2 )

```

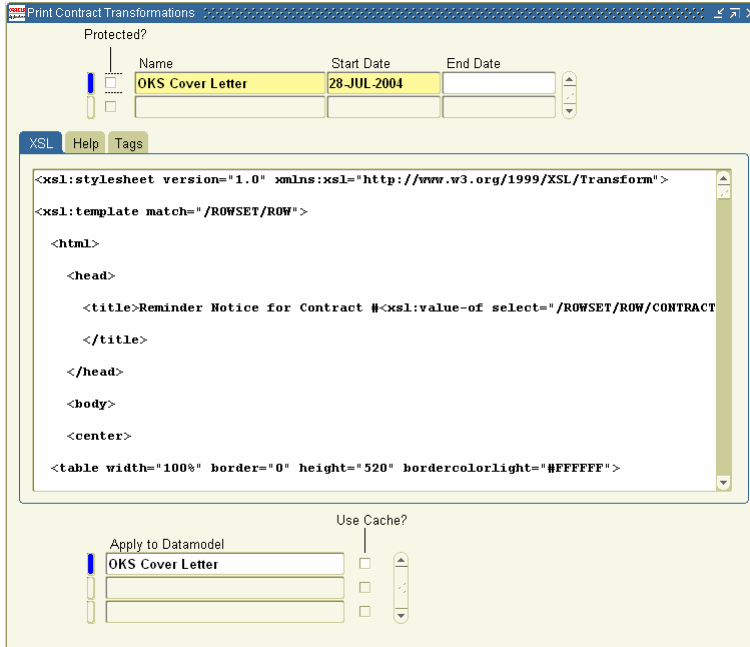
```
CURSOR (
  SELECT upper(email_address) user_name
  FROM okx_contact_points_v ocp
  WHERE ocp.contact_point_id = orb.rule_information1 ) USER_NAME,
CURSOR (
  SELECT phone_area_code, phone_number
  FROM okx_contact_points_v ocp
  WHERE ocp.contact_point_id = orb.rule_information2
  AND ocp.phone_line_type='GEN' ) PHONE,
CURSOR (
  SELECT phone_area_code, phone_number
  FROM okx_contact_points_v ocp
  WHERE ocp.contact_point_id = orb.rule_information3
  AND ocp.phone_line_type='FAX' ) FAX,
CURSOR (
  SELECT address1,
         address2,
         address3,
         address4,
         city,
         postal_code,
         state
  FROM okx_cust_sites_v ocs
  WHERE ocs.id1 = orb.rule_information4 ) ADDRESS,
CURSOR (
  SELECT occ.name as CONTACT_NAME,
         hp.party_name as PARTY_NAME
  FROM okx_cust_contacts_v occ , hz_parties hp
  WHERE occ.id1 = orb.object1_id1
  AND occ.party_id = hp.party_id ) CONTACT
FROM okc_rules_b orb, okc_rule_groups_b org
where orb.rgp_id = org.id
and org.chr_id = HDR.ID
AND org.cle_id IS NULL
AND orb.rule_information_category = 'QTO') INFO
FROM OKC_K_HEADERS_B HDR
WHERE HDR.ID = :ID
```

When you cut and paste, make sure that you don't include additional blank characters or lines at the end of the query. Experience has shown that this can cause unintended results.

Leave the Help and Parameters tabs blank.

Service Contracts Manager > Setup > Contracts > OKC Print Contract Setup > Stylesheet

Define Stylesheets for Cover Letters, Quote Letters and Reminder Notices as shown below:



The text for this stylesheet is:

```
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:template match="/ROWSET/ROW">
<html>
<head>
<title>Reminder Notice for Contract #<xsl:value-of
select="/ROWSET/ROW/CONTRACT_NUMBER"/>
</title>
</head>
<body>
<center>
<table width="100%" border="0" height="520" bordercolorlight="#FFFFFF">
<tr bordercolor="#000000">
<td>
<div align="left"><font face="Arial" size="2">Date: <xsl:value-of
select="TODAY"/>
</font></div>
</td>
<td width="23%">&nbsp;</td>
<td width="23%">
<div align="right"><font face="Arial" size="2">Telephone: </font> </div>
</td>
```

```
<td width="30%"><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/PHONE/PHONE_ROW/PHONE_AREA_CODE"/>-
<xsl:value-of
select="INFO/INFO_ROW/PHONE/PHONE_ROW/PHONE_NUMBER"/></font></td>
</tr>
<tr bordercolor="#000000">
<td>&nbsp;</td>
<td width="23%">&nbsp;</td>
<td width="23%">
<div align="right"><font face="Arial" size="2">Fax: </font> </div>
</td>
<td width="30%"><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/FAX/PHONE_ROW/PHONE_AREA_CODE"/>-<xsl:value-
of
select="INFO/INFO_ROW/FAX/PHONE_ROW/PHONE_NUMBER"/></font></td>
</tr>
<tr bordercolor="#000000">
<td>&nbsp;</td>
<td width="23%">&nbsp;</td>
<td width="23%">
<div align="right"><font face="Arial" size="2">Email: </font> </div>
</td>
<td width="30%"><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/EMAIL_ADDRESS/EMAIL_ADDRESS_ROW/EMAIL_A
DDRESS"/></font></td>
</tr>
<tr bordercolor="#000000">
<td><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/CONTACT_NAME"/></fon
t></td>
<td colspan="3">
<div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
<td><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/PARTY_NAME"/></font></
td>
<td colspan="3">
<div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
<td><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/ADDRESS1"/> <xsl:value-of
```

```
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/ADDRESS2"/> <xsl:value-of
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/ADDRESS3"/> <xsl:value-of
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/ADDRESS4"/></font></td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/CITY"/></font></td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td><font face="Arial" size="2"><xsl:value-of
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/STATE"/> - <xsl:value-of
select="INFO/INFO_ROW/ADDRESS/ADDRESS_ROW/POSTAL_CODE"/>
    </font></td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td>&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td>&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4"><font face="Arial" size="2">Re: Service Renewal # <xsl:value-of
select="CONTRACT_NUMBER"/>
    </font>
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td>&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
```

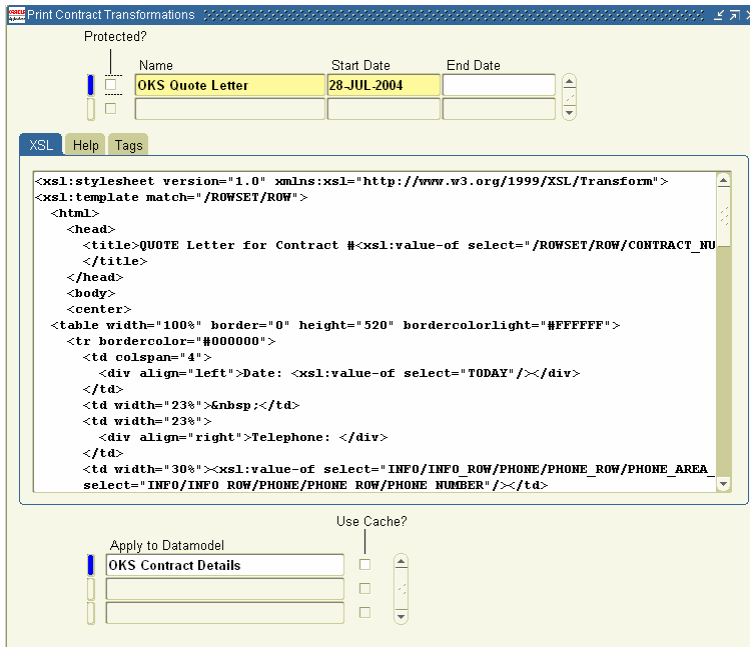
```

</td>
</tr>
<tr bordercolor="#000000">
  <td>&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4"><font face="Arial" size="2">Dear <xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/CONTACT_NAME"/>,
  </font>
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">
    <div align="left"><font face="Arial" size="2">Please find attached a quotation for
the above
      <div align="center">
        ZebraCare Services
        renewal. The benefits and services you are receiving will expire on
        <xsl:value-of select="EXPIRY_DATE"/>. This quotation is provided pursuant to
the terms and
        conditions of the agreement that you executed when you acquired
        your equipment. If you are not the appropriate person within your company
        to manage this service renewal, please send an email to our
        <a href="mailto:cconsoli@zebra.com">Renewal Help Desk</a>
        to let us know with whom we should be working.</font></div>
      <div align="right"></div>
      <div align="right"></div>
      <div align="right"></div>
      <div align="right"></div>
    </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
</tr>
<tr bordercolor="#000000">

```

```
<td colspan="4">
  <div align="left"><font face="Arial" size="2">In order to renew this service and to
ensure that there
  is no interruption to that service, please have an authorized representative
  visit the
    <a href="http://z03srlweb03.zebra.com:9502/OA_HTML/jtfllogin.jsp">
      Zebra Service Contract Website</a> before <xsl:value-of
select="START_DATE"/>.
    Your username and password are shown below. Here you will
    find the detailed quotation for the above contract renewal. Please review
    this information and accept the quote online, simply by clicking on
    the Accept button. You will then be prompted for your form of payment,
    including credit card number or purchase order covering the renewal
    amount as detailed on your quote. By having your payment information
    ready before logging on, you will ensure a smooth renewal process.</font></div>
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4"><font face="Arial" size="2">Your order is not effective until
accepted by Zebra. If
  accepted, Zebra will notify you and your notice will include a copy of
  your invoice. Applicable tax will be included on your invoice.</font></td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4"><font face="Arial" size="2">Zebra repair service policies govern
the terms of
  repair services and are subject to change. The most current repair
  service policies can be found on the web at:
    <a href="http://www.zebra.com">http://www.zebra.com</a>.</font></td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">
    <div align="left"><font face="Arial" size="2">We would like to take this
opportunity to thank you
    for your continued business with Zebra. If you require further information
```

or assistance, please do not hesitate to email our
Renewal Help Desk
or review our FAQ at your earliest convenience.</div>
</td>
</tr>
<tr>
 <xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:template match="/ROWSET/ROW">
 <td colspan="4"> </td>
</xsl:template>
</xsl:stylesheet>
 </tr>
 <tr bordercolor="#000000">
 <td colspan="4">USERNAME: <xsl:value-of
select="INFO/INFO_ROW/USER_NAME/USER_NAME_ROW/USER_NAME"/>
 </td>
 </tr>
 <tr bordercolor="#000000">
 <td colspan="4">PASSWORD: <xsl:value-of
select="/ROWSET/ROW/PASSWORD"/>
 </td>
 </tr>
 <tr bordercolor="#000000">
 <td colspan="4">URL: Zebra
 Service Contract Website</td>
 </tr>
 <tr bordercolor="#000000">
 <td colspan="4"> </td>
 </tr>
 <tr bordercolor="#000000">
 <td colspan="4">Regards,</td>
 </tr>
 <tr bordercolor="#000000">
 <td colspan="4">Zebra Aftermarket
Services</td>
 </tr>
</table>
</center>
</body>
</html>
</xsl:template>
</xsl:stylesheet>



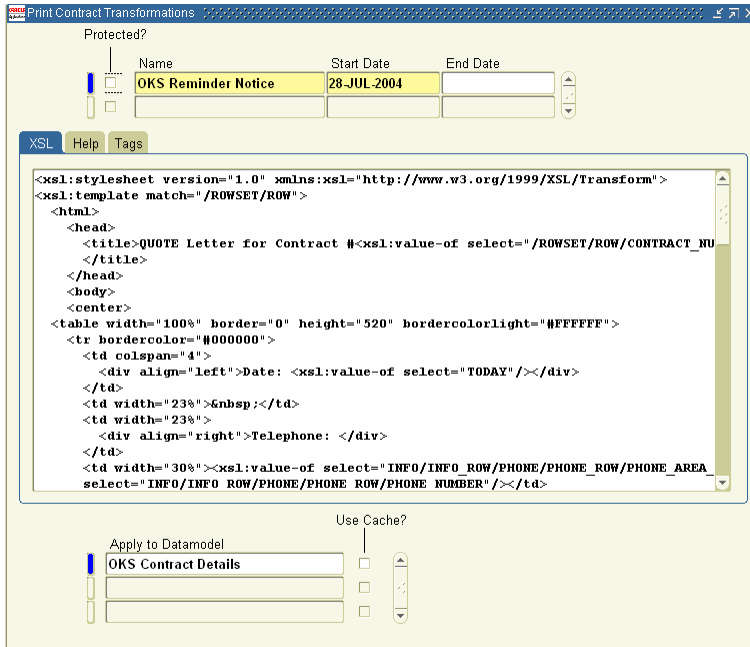
The text for this stylesheet is:

```
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:template match="/ROWSET/ROW">
  <html>
    <head>
      <title>QUOTE Letter for Contract #<xsl:value-of
select="/ROWSET/ROW/CONTRACT_NUMBER"/>
    </title>
    </head>
    <body>
      <center>
        <table width="100%" border="0" height="520" bordercolorlight="#FFFFFF">
          <tr bordercolor="#000000">
            <td colspan="4">
              <div align="left">Date: <xsl:value-of select="TODAY"/></div>
            </td>
            <td width="23%">&nbsp;</td>
            <td width="23%">
              <div align="right">Telephone: </div>
            </td>
            <td width="30%"><xsl:value-of
select="INFO/INFO_ROW/PHONE/PHONE_ROW/PHONE_AREA_CODE"/>-
<xsl:value-of
select="INFO/INFO_ROW/PHONE/PHONE_ROW/PHONE_NUMBER"/></td>
            </tr>
          <tr bordercolor="#000000">
            <td colspan="4">&nbsp;</td>
          </tr>
        </table>
      </center>
    </body>
  </html>
</xsl:template>
</xsl:stylesheet>
```

```
<td width="23%">&nbsp;</td>
<td width="23%">
  <div align="right">Fax: </div>
</td>
<td width="30%"><xsl:value-of
select="INFO/INFO_ROW/FAX/PHONE_ROW/PHONE_AREA_CODE"/><xsl:value-
of
select="INFO/INFO_ROW/FAX/PHONE_ROW/PHONE_NUMBER"/></td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
  <td width="23%">&nbsp;</td>
  <td width="23%">
    <div align="right">Email: </div>
  </td>
  <td width="30%"><xsl:value-of
select="INFO/INFO_ROW/EMAIL_ADDRESS/EMAIL_ADDRESS_ROW/EMAIL_A
DDRESS"/></td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4"><xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/CONTACT_NAME"/></td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">Re: Service Renewal # <xsl:value-of
select="CONTRACT_NUMBER"/>
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="4">&nbsp;</td>
  <td colspan="3">
    <div align="right"></div>
  </td>
</tr>
<tr bordercolor="#000000">
```

```
<td colspan="7">Dear <xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/CONTACT_NAME"/>,
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">
    <div align="left">We would like to take this opportunity to thank you
    for your continued business with Zebra. If you require further information
    or assistance, please do not hesitate to email our Renewal Help Desk
    or review our FAQ at url at your earliest convenience.</div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">Regards,</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">Zebra Support Services</td>
</tr>
</table>
</center>
</body>
</html>

</xsl:template>
</xsl:stylesheet>
```



The text for this stylesheet is:

```
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:template match="/ROWSET/ROW">
  <html>
    <head>
      <title>QUOTE Letter for Contract #<xsl:value-of
select="/ROWSET/ROW/CONTRACT_NUMBER"/>
    </title>
    </head>
    <body>
      <center>
        <table width="100%" border="0" height="520" bordercolorlight="#FFFFFF">
          <tr bordercolor="#000000">
            <td colspan="4">
              <div align="left">Date: <xsl:value-of select="TODAY"/></div>
            </td>
            <td width="23%">&nbsp;</td>
            <td width="23%">
              <div align="right">Telephone: </div>
            </td>
            <td width="30%"><xsl:value-of
select="INFO/INFO_ROW/PHONE/PHONE_ROW/PHONE_AREA_CODE"/>-
<xsl:value-of
select="INFO/INFO_ROW/PHONE/PHONE_ROW/PHONE_NUMBER"/></td>
          </tr>
          <tr bordercolor="#000000">
            <td colspan="4">&nbsp;</td>
          </tr>
        </table>
      </center>
    </body>
  </html>
</xsl:template>
</xsl:stylesheet>
```

```
<td width="23%">&nbsp;</td>
<td width="23%">
  <div align="right">Fax: </div>
</td>
<td width="30%"><xsl:value-of
select="INFO/INFO_ROW/FAX/PHONE_ROW/PHONE_AREA_CODE"/><xsl:value-
of
select="INFO/INFO_ROW/FAX/PHONE_ROW/PHONE_NUMBER"/></td>
</tr>
<tr bordercolor="#000000">
<td colspan="4">&nbsp;</td>
<td width="23%">&nbsp;</td>
<td width="23%">
  <div align="right">Email: </div>
</td>
<td width="30%"><xsl:value-of
select="INFO/INFO_ROW/EMAIL_ADDRESS/EMAIL_ADDRESS_ROW/EMAIL_A
DDRESS"/></td>
</tr>
<tr bordercolor="#000000">
<td colspan="4"><xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/CONTACT_NAME"/></td>
<td colspan="3">
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
<td colspan="7">Re: Service Renewal # <xsl:value-of
select="CONTRACT_NUMBER"/>
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
<td colspan="4">&nbsp;</td>
<td colspan="3">
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
<td colspan="4">&nbsp;</td>
<td colspan="3">
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
<td colspan="4">&nbsp;</td>
<td colspan="3">
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
```

```
<td colspan="7">Dear <xsl:value-of
select="INFO/INFO_ROW/CONTACT/CONTACT_ROW/CONTACT_NAME"/>,
  <div align="right"></div>
</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">
    <div align="left">We would like to take this opportunity to thank you
    for your continued business with Zebra. If you require further information
    or assistance, please do not hesitate to email our Renewal Help Desk
    or review our FAQ at url at your earliest convenience.</div>
  </td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">&nbsp;</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">Regards,</td>
</tr>
<tr bordercolor="#000000">
  <td colspan="7">Zebra Support Services</td>
</tr>
</table>
</center>
</body>
</html>
</xsl:template>
</xsl:stylesheet>
```

These stylesheets can be modified directly in the forms into which they are pasted, or you can use an HTML editing tool like Microsoft's Front Page to make changes. The latter method is preferable, as you can preview the changes you make without running the reports in the application. You can then cut and paste into the form.

Define an Electronic Renewal Template

Service Contracts Manager > Setup > Contracts > Define Electronic Renewal Template

Define the Electronic Renewal Template as in the example below. Refer to the queries and stylesheets you created above – they will appear in the LOV in each case.

The screenshot shows the 'Template Set' window. The 'Name' field is 'ZEBRA' and the 'Description' is 'Zebra Electronic Renewal Template'. The 'Quote Letter' is 'OKS Quote Letter, OKS Contract Details' and the 'Cover Letter' is 'OKS Cover Letter, OKS Cover Letter'. Below these fields is a table with columns: Report Type, Report Name, Effective Dates, Report Duration, Report Period, and Status.

Report Type	Report Name	Effective Dates	Report Duration	Report Period	Status
Reminder Notice	OKS Reminder Notice		3	MONTH	
Reminder Notice	OKS Reminder Notice		2	MONTH	
Reminder Notice	OKS Reminder Notice		1	MONTH	

Define the Global Contract Defaults

Service Contracts Manager > Setup > Contracts > Global Contract Defaults

Set up your global defaults as below:

The screenshot shows the 'Global Contracts Defaults' window. It includes fields for Renewal Type (Notify Salesrep), Pricing Method (Price List), PO Required (unchecked), Price List (ZEBRA US SERVICE), Approval Workflow (OKCAUKAP), Help Desk (Tokarz, Dan), Contract Group (New Order: US Barcode C, Renewal: US Barcode C), Revenue (Estimated %: 100.00, Duration: 1, Period: Year), Billing Profile (1), Role (Customer), Credit Amount, Grace (Duration, Period), Credit Card Threshold (Curr, Amount), and Active Threshold (Curr, Amount). The 'Electronic Renewal' section has 'Enable' checked, 'Payment Terms for Credit Card' set to '30 NET', and 'Threshold Curr' set to 'USD' and 'Threshold Amount' set to '1'.

Below the configuration fields is a table for 'Electronic Renewal' rules:

Organization Name	Start Date	End Date	Curr	Threshold Amount	Payment Terms for Credit Card	Help Desk	Template Set	Billing Profile
ZTCOU	22-JUL-2004		USD				ZEBRA	1
ZTEOU	22-JUL-2004		GBP				ZEBRA	1

They do not need to be exactly the same as above, but for Electronic Renewals purposes, make sure that Electronic Renewals are enabled and that a Template Set is specified.

Note that, in the lower part of the form, you can specify different template sets for different organizations.

Be sure to add a Help Desk entry (from LOV), as the renewal workflow will fail without one.

Define an Independent Condition

The Independent Condition is defined to renew a contract (into the Entered status) a specified number of days prior to its expiration.

Service Contracts Manager > Contract Events > Define Independent Condition

Define an Independent Condition as below:

Click on the Show Condition button:

and then click on the Validate button.

Click on the Notification tab and enter a recipient for Success and Failure messages as below:

Outcomes	Success Notifier	Failure Notifier
Contract Renewal	Tokarz, Dan	Tokarz, Dan

Parameters []

Create Task Task Owner []

Click on the Parameters button and ensure that the following is populated:

Parameter	Description	Data Type	Action Attribute	Value
P_CONTRACT	Contract Identifier	NUMBER	CONTRACT ID	

OR

OK

Click on OK.

Schedule the Date Assembler

The Date Assembler identifies all contracts that meet the date-based conditions specified above and triggers the outcome defined.

Corporate Contracts Manager > Control > Requests > Run

Schedule the Date Assembler to run once per day during non-working hours:

Submit Request

Run this Request...
Name: Date Assembler

At these Times...
Run the Job

Upon Completion...
Notify: Periodically

Run the Job...
 As Soon as Possible
 Once
 Periodically
 On Specific Days
 Advanced

Start At: 31.AUG.2004 23:45:00
 End At: []
 Leave End Date blank to run indefinitely

Re-run every: 1 Day(s)

Apply the Interval...
 From the Start of the prior run
 From the Completion of the prior run

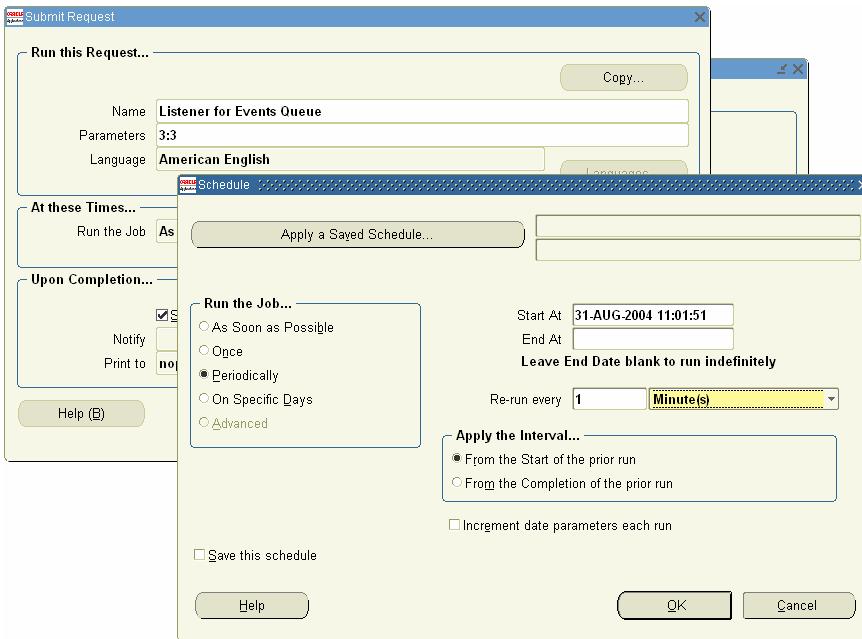
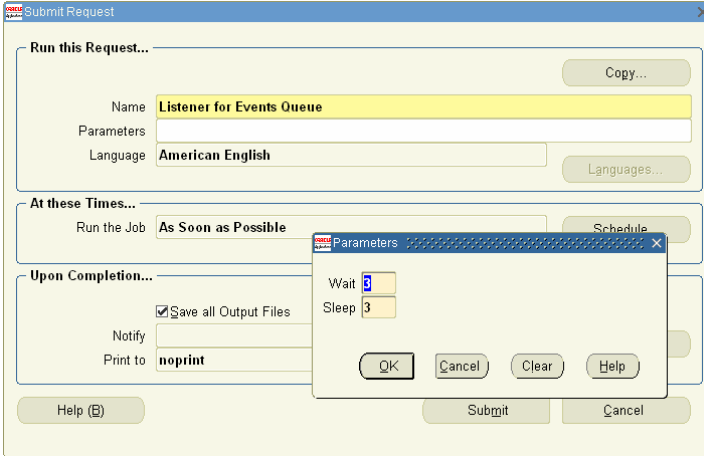
Increment date parameters each run

Save this schedule

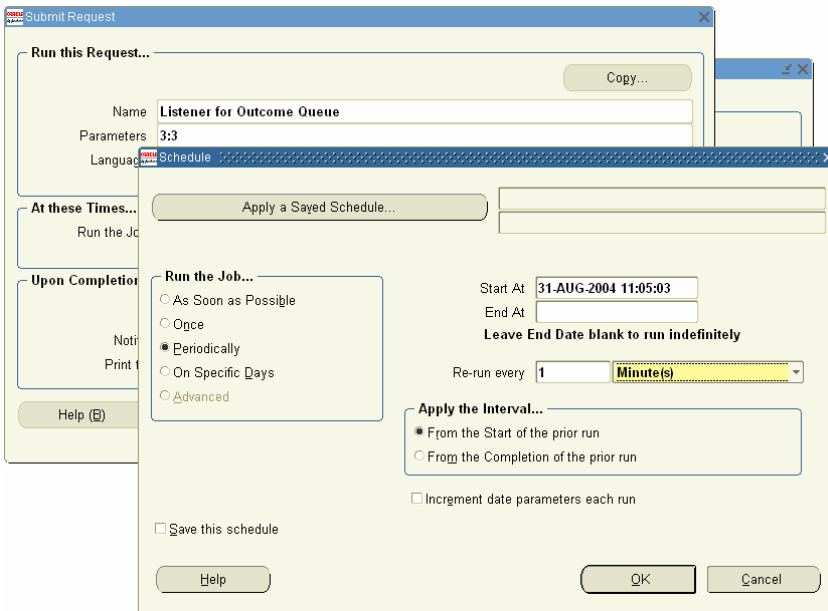
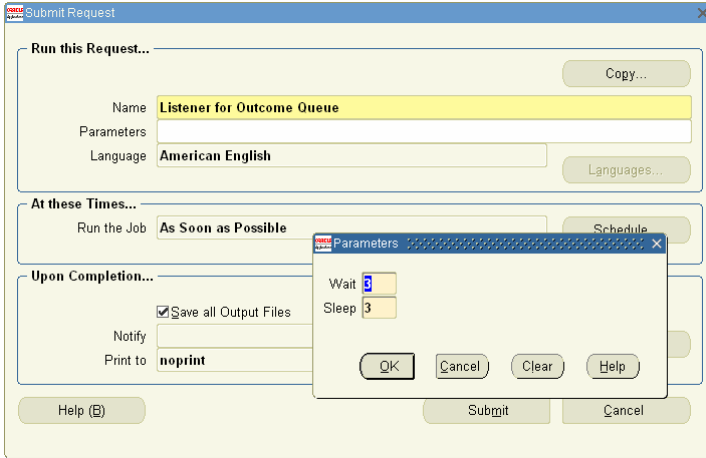
Help OK Cancel

Start the Listeners for Events/Outcomes Queues

These steps are only necessary if you have *not* implemented GSM (Generic Service Management). Check with your DBA to see if this has been implemented. If required, start each listener as below. Each should be scheduled to run once a minute:



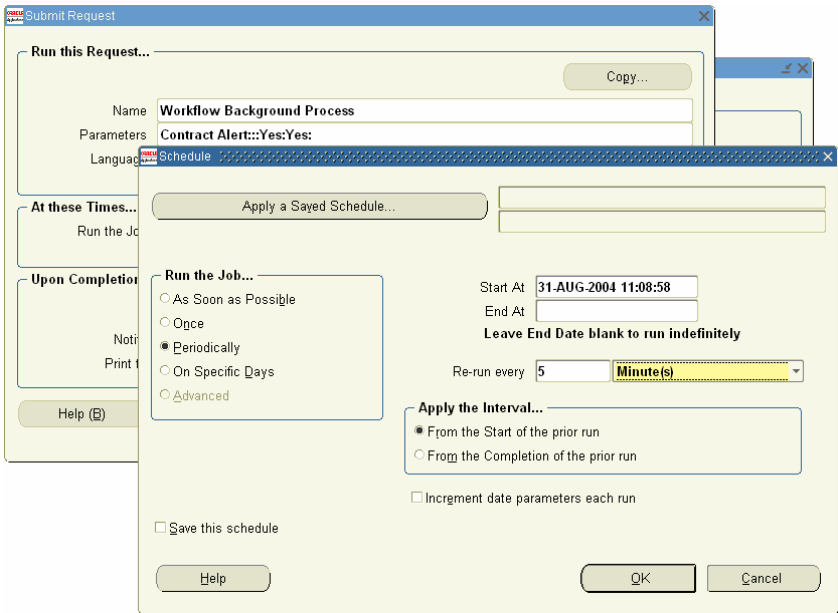
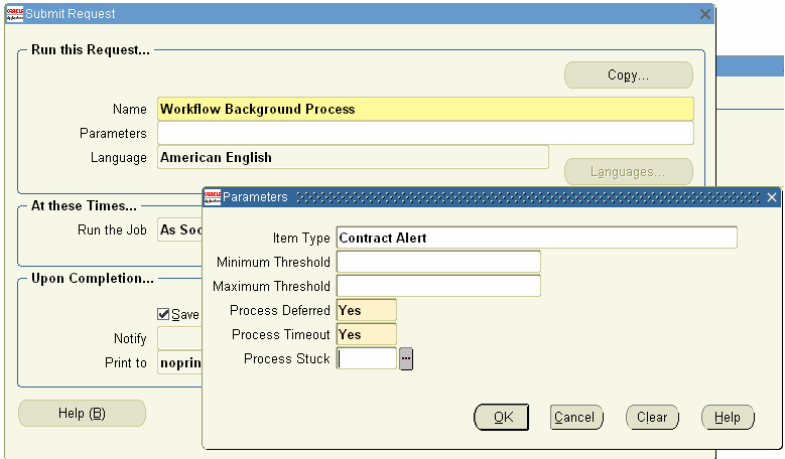
and for the Outcomes Queue:



Start the Workflow Background Process – Contract Alerts

System Administrator > Requests > Run

Submit as below:



Electronic Renewal Process

For a contract to be eligible for Electronic Renewal, it has to be defined as such. This is done as below:

Service Contracts Manager > Launch Contracts > Tools > New

During the normal authoring process, specify the renewal rules as below:

Make sure that you have the “Quote To” information completed, as this is what drives the email letter.

The renewal of the contract will be initiated by the Contract Event set up earlier (the Independent Condition). Once this condition is met, the contract will be renewed and a new contract, with the same number as the original but with a modifier, will be created in the Entered status.

For testing purposes, you may renew the contract manually. The process that follows will be triggered in the same way as if the Independent Condition had driven it.

As soon as the contract is renewed, an email is sent to the email address entered in the “Quote To” region of the Renewal tab, as above.

The email is built from the Cover Letter query and the Cover Letter stylesheet defined earlier and specified on the Electronic Renewal Template. An example is shown below:

Date: September 09, 2004

Telephone: 555-555-5555
 Fax: -
 Email: zdireland@zebra.com

Dillinger, John
 MILES TECHNOLOGIES
 1150 Heather Drive
 LAKE ZURICH
 IL - 60047

Re: Service Renewal # US-100037-EW

Dear Dillinger, John,

Please find attached a quotation for the above ZebraCare Services renewal. The benefits and services you are receiving will expire on August 31, 2005. This quotation is provided pursuant to the terms and conditions of the agreement that you executed when you acquired your equipment. If you are not the appropriate person within your company to manage this service renewal, please send an email to our [Renewal Help Desk](#) to let us know with whom we should be working.

In order to renew this service and to ensure that there is no interruption to that service, please have an authorized representative visit the [Zebra Service Contract Website](#) before September 01, 2005. Your username and password are shown below. Here you will find the detailed quotation for the above contract renewal. Please review this information and accept the quote online, simply by clicking on the Accept button. You will then be prompted for your form of payment, including credit card number or purchase order covering the renewal amount as detailed on your quote. By having your payment information ready before logging on, you will ensure a smooth renewal process.

Your order is not effective until accepted by Zebra. If accepted, Zebra will notify you and your notice will include a copy of your invoice. Applicable tax will be included on your invoice.

Zebra repair service policies govern the terms of repair services and are subject to change. The most current repair service policies can be found on the web at: <http://www.zebra.com>


We would like to take this opportunity to thank you for your continued business with Zebra. If you require further information or assistance, please do not hesitate to email our [Renewal Help Desk](#) or review our FAQ at your earliest convenience.

USERNAME: ZDIRELAND@ZEBRA.COM
 PASSWORD: *****
 URL: [Zebra Service Contract Website](#)

Regards,
 Zebra Aftermarket Services

The application generates a user name and password based on the email address of the Quote To party. (The password is visible the first time an email is generated; subsequent emails have it masked as the party changes the password during their first log-on).

USERNAME: ZDIRELAND@ZEBRA.COM
 PASSWORD: *****
 URL: [Zebra Service Contract Website](#)
 Regards,
 Zebra Aftermarket Services


 quote.html
 (3KB)

The email will include an attachment that is the OKS Quote Letter defined during set up. The quote can be accessed by double-clicking on the link and opening the attachment.

Date: September 09, 2004 Telephone: 555-555-5555

Fax -

Email: zdireland@zebra.com

Dillinger, John

Re: Service Renewal # US-100037-EW

Dear Dillinger, John,

We would like to take this opportunity to thank you for your continued business with Zebra. If you require further information or assistance, please do not hesitate to email our Renewal Help Desk or review our FAQ at url at your earliest convenience.

Regards,

Zebra Support Services

As can be seen, the sample Quote Letter (modified above very slightly from the code from the Vision instance) is extremely generic and needs customization before being useful. At the very least, it should include information on covered products/items, pricing and terms and conditions. Customization will require modifications to the query and the stylesheet.

In the email Cover Letter, the customer is invited to click on the renewal link. Once they do so, they will see the CRM Home Page as below:

Welcome to **Oracle eBusiness Suite**

Login

User ID

Password

[Register Here](#)

TIP Did you forget your password?

About Oracle e-business suite!

In a marketplace where speed provides a competitive advantage, your choice is E-business or out of business. Oracle E-Business Suite is the simple, complete solution designed to get you moving at internet speed.

Favorites

- [Oracle](#)
- [CNN](#)
- [Yahoo](#)
- [Amazon](#)

Oracle Links

- [Oracle Home](#)
- [Applications](#)
- [Education](#)
- [Consulting](#)
- [Partners](#)

The About region on this page can be customized to fit your business needs and communicate your firm's global messages or announcements. To customize this region you just need to edit the jtflogin.jsp file using an HTML or text editor. In addition, if you deploy Oracle Marketing Encyclopedia (MES) this page will display news feeds out of MES.

This log-on page should be Client-branded prior to go-live. Once logged on, the customer sees a screen similar to the one below:

ORACLE Oracle Applications [Electronic Renewals](#) [Technical Support](#) [Contact Us](#) [Profile](#) [Sign Out](#)

Welcome ZDIRELAND
Service Contract Renewals

Select a Contract Number and ...

Select Contract Number	Contract Number Modifier	Amount	Start Date	End Date	Status	Renewal Status
<input type="radio"/> US-100037-EW	09-SEP-04 07:51:06	250.00 USD	01-SEP-2005	31-AUG-2006	Entered	Quote Sent

Select a Contract Number and ...

[Electronic Renewals](#) | [Technical Support](#) | [Contact Us](#) | [Profile](#) | [Sign Out](#)

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The customer selects the contract to be renewed, then clicks on the button. This takes them to the following screen:

ORACLE Oracle Applications [Electronic Renewals](#) [Technical Support](#) [Contact Us](#) [Profile](#) [Sign Out](#)

Payment Information Contact Information Contract Agreement

Accept Contract Renewal

Contract Number	US-100037-EW	Start Date	01-SEP-2005
Contract Number Modifier	09-SEP-04 07:51:06	End Date	31-AUG-2006
Renewal Status	Quote Sent	Total	250 USD
Status	Entered		

Contact Information

Contact Name	John Dillinger
Contact Email Address	zdireland@zebra.com
Billing Contact	
Bill To Address	1150 Heather Drive LAKE ZURICH IL 60047 United States

Payment Information

Please choose from one of the following payment methods below.

Credit Card Card Number
 Expiry Date
MMYY

Check/Cheque Check/Cheque Number

Wire Wire Number

Purchase Order Purchase Order

Step 1 of 3

[Electronic Renewals](#) | [Technical Support](#) | [Contact Us](#) | [Profile](#) | [Sign Out](#)

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They enter payment information:

Payment Information
Please choose from one of the following payment methods below.

Credit Card Card Number
 Expiry Date
 MMYY

Check/Cheque Check/Cheque Number

Wire Wire Number

Purchase Order Purchase Order

Step 1 of 3

and then click on the button:

ORACLE Oracle Applications [Electronic Renewals](#) [Technical Support](#) [Contact Us](#) [Profile](#) [Sign Out](#)

Payment Information **Contact Information** Contract Agreement

Accept Contract Renewal

Contract Number	US-100037-EW	Start Date	01-SEP-2005
Contract Number Modifier	09-SEP-04 07:51:06	End Date	31-AUG-2006
Renewal Status	Quote Sent	Total	250 USD
Status	Entered		

Contact Information

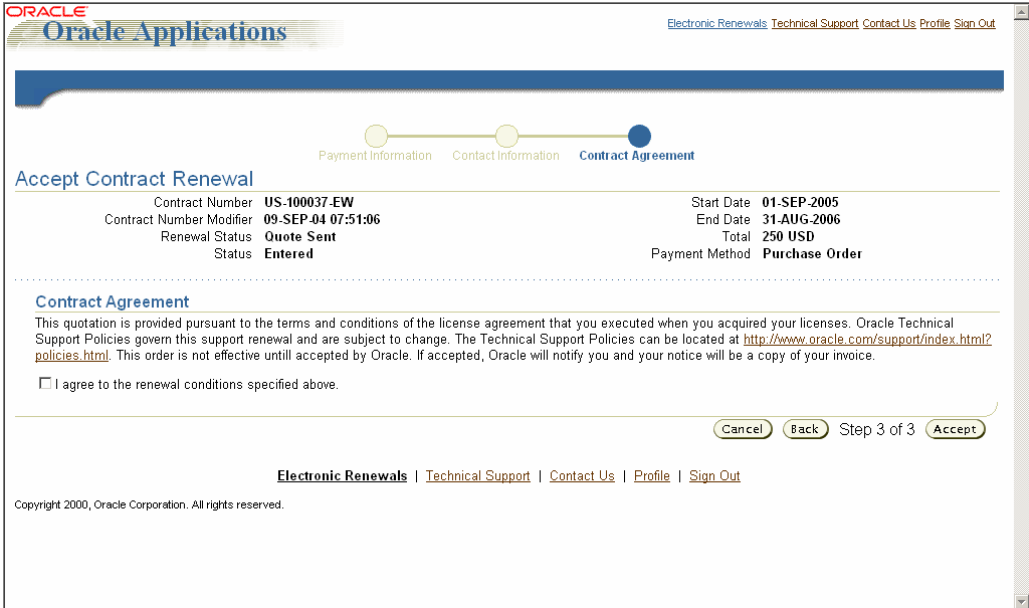
Contact Name **John Dillinger**
 Contact Email Address **zdireland@zebra.com**
 Payment Method **Purchase Order**
 Purchase Order **987654**

Step 2 of 3

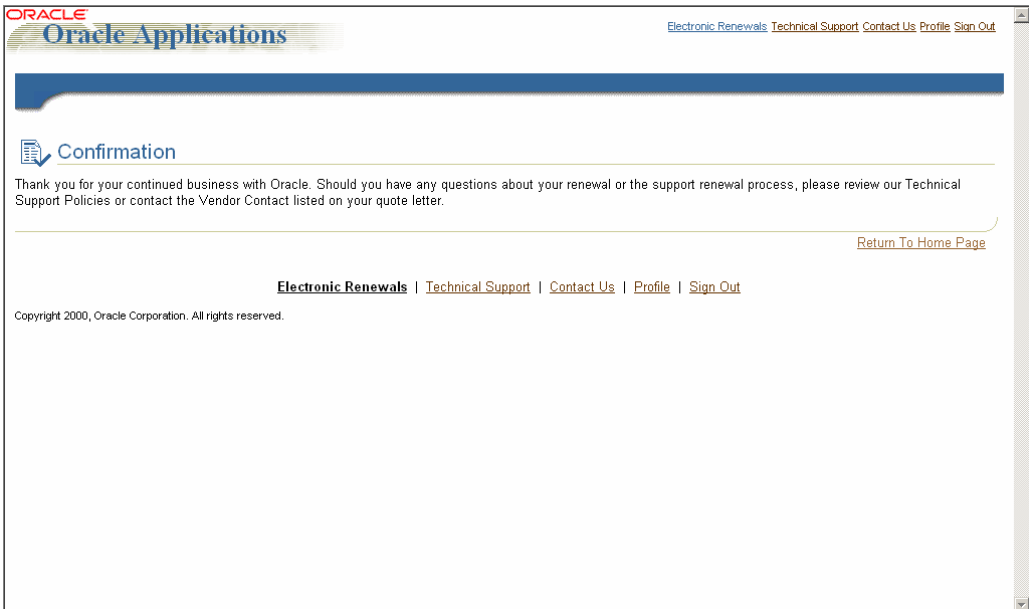
[Electronic Renewals](#) | [Technical Support](#) | [Contact Us](#) | [Profile](#) | [Sign Out](#)

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After reviewing the information on this screen, they click on the button:

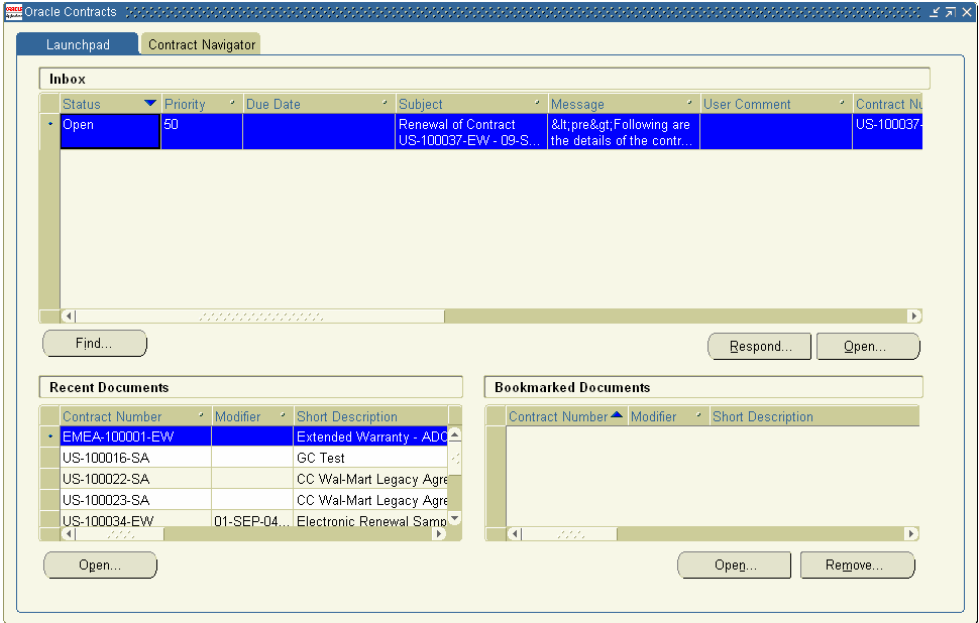


This screen is Oracle-branded and should be Client-branded prior to going live. The customer agrees to the terms stated on this page and then clicks on the **Accept** button.

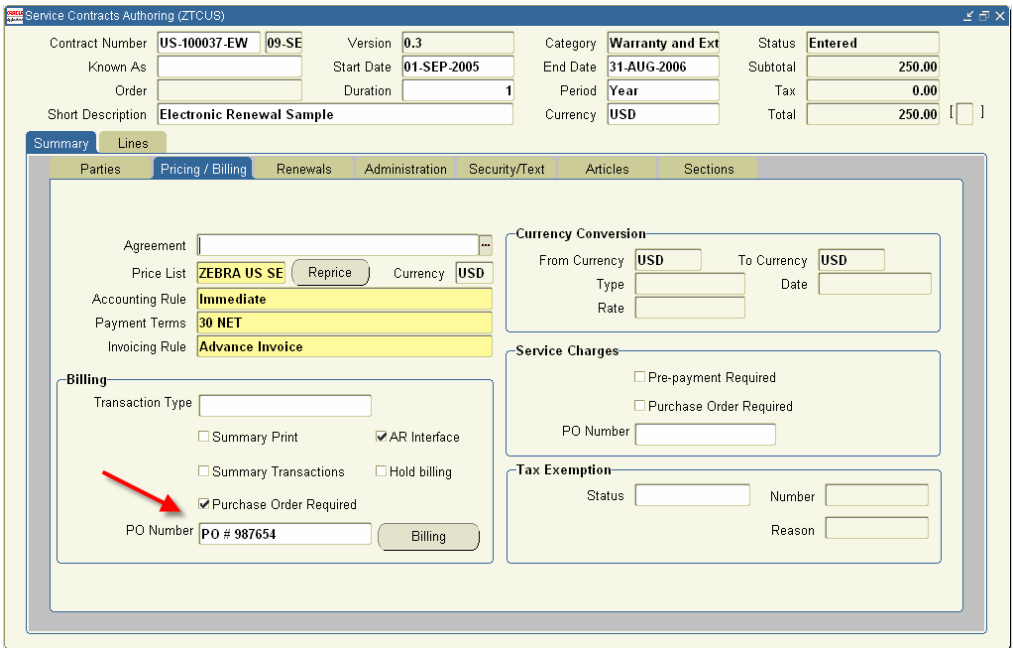


They can then log off, completing their part in the process.

When the Contract Administrator logs on to the application again, their inbox will have a message as below:



signifying that the contract renewal has been accepted. The renewed contract will now contain the payment details entered by the customer:



The contract is then reviewed, approved and signed. Billing occurs normally once the contract becomes active.