ramco

RAMCO AVIATION SOLUTION

VERSION 5.9

USER GUIDE

SALES SETUP

ABOUT THIS MANUAL

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco Aviation Solution. This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based software.

HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 7 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the **Sales Setup** business process. The sub processes are explained in the remaining chapters.

Chapter 2 dwells on the **Customer Setup** sub process.

Chapter 3 focuses on the **Manage Definition for Sales Setup** sub process.

Chapter 4 dwells on the **Sales Tax Rules** sub process.

Chapter 5 explains the **Part Pricing Setup** sub process.

Chapter 6 dwells on the **Service Pricing Setup** sub process.

Chapter 7 describes on the **Sale Contract - Services** sub process.

The **Index** offers a quick reference to selected words used in the manual.

DOCUMENT CONVENTIONS

- The data entry has been explained taking into account the “Create” business activity. Specific references (if any) to any other business activity such as “Modify” and “View” are given as “Note” at the appropriate places.
- **Boldface** is used to denote commands and user interface labels.

  Example: Enter **Company Code** and click the **Get Details** pushbutton.
- Italics used for references. Example: *See Figure 1.1.*
- The icon is used for Notes, to convey additional information.

REFERENCE DOCUMENTATION

This User Guide is part of the documentation set that comes with Ramco Aviation Solution. The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems’ Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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INTRODUCTION

Competitive market environment necessitates that organizations evolve a dynamic and responsive mechanism for pricing the goods sold and the services rendered. Sophisticated pricing techniques factor in parameters such as the customer, nature of goods sold, delivery area etc. to arrive at the final sale price.

Sale of goods and services would require a comprehensive customer record system to be established. Customer details such as the name and address, contact information, contracts and payment terms are recorded as part of the customer registration process.

The **Sales Setup** business process addresses the primary (master) information needs of managing sale of goods and services. Registration of customers, setting up of basic entities such as contract information, payment terms, taxes/charges/discounts, definition of price-lists and rules for the applicable taxes and charges are facilitated through this process.

Customer Setup sub process addresses the business need of maintaining the relationship information regarding all the customers of an MRO organization.

Master Definition for Sales Setup sub process facilitates definition of basic entities such as customer payment terms, tax/charge/discount, and delivery area.

Sales Tax Rules sub process enables you to describe company level policy for the taxes at various levels such as customer group level, station level and warehouse level.

Part Pricing Setup sub process helps in establishing part pricelists and configuring rules for identifying the applicable taxes and charges for goods sold.

Service Pricing Setup sub process eases service pricelist definition and rules configuration for identifying the applicable taxes and charges for the services rendered.

Sales Contract - Services sub process enables you to maintain and record essential information relating to a sale contract and approve or close customer contracts.

CUSTOMER SETUP

The **Customer Setup** sub process addresses the business need of maintaining the relationship information regarding all the customers of an MRO organization. Multiple sales units of the same MRO organization can service customers with diverse business interests and/or having multi-geographic presence.

Creation of a common customer database and maintaining order processing location specific information is facilitated through the customer setup sub process.

The **Customer** business component enables you to induct a new customer; record sales point specific information and group customer according to specific needs.

2.1 REGISTERING CUSTOMER

A customer is defined as an entity who receives any kind of service from the maintenance service provider or from an operator who has excess capacity and who services other customers. You are allowed to register a customer with a unique number and record the customer details.

2.1.1 SETTING SALES PROCESS PARAMETERS

1. Select **Set Sales Process Parameters** activity under the **Customer** business component. The **Set Sales Process Parameters** page appears. *See Figure 2.1.*

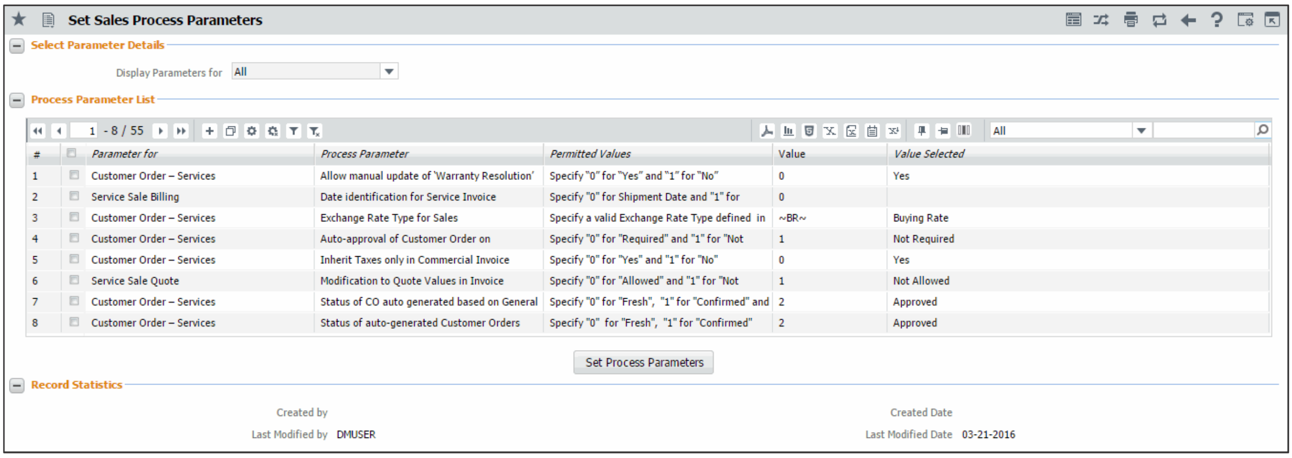


Figure 2.1 Registering the customer

2. Select the basis on which you wish to display the parameters in the multiline in the Display Parameter For drop-down list box.
3. Enter the **Value** of the parameter in the Process Parameter List multiline.
4. The system displays **Parameter For**, **Process Parameter**, **Permitted Values** and a brief description of the **Value Selected** in the multiline.
5. Click the **Set Process Parameters** pushbutton to save all the process parameter details.

2.1.2 CREATING CUSTOMER DETAILS

1. Select **Create Customer Record** under **Customer** business component. The **Create Customer Record** page appears. *See Figure 2.2.*

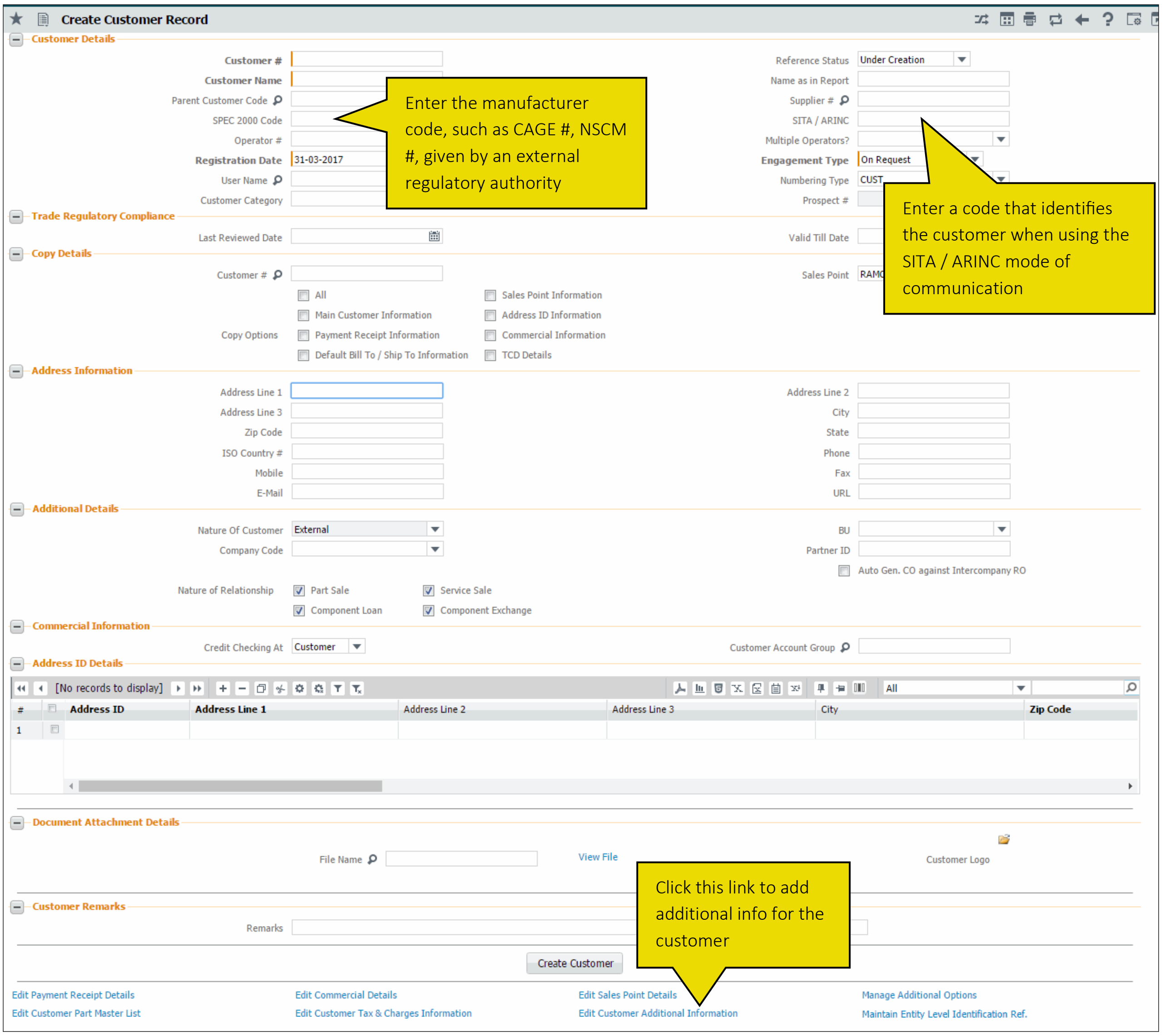


Figure 2.2 Create Customer Record

2. Enter the **Customer #** to uniquely identify the customer.
3. Select "Active" in the **Reference Status** drop-down list box, if the customer information entry is complete. Else select "Under Creation".

   Note: A customer can be referred to in all transactions only after attaining the "Active" status. You can activate a customer in this page or in "Select Customer" page of "Edit Customer Record" activity.

4. Enter the **Customer Name**.
5. Enter the **Registration Date** and **Parent Customer Code**.
6. 6. Provide the manufacturer code given by external regulatory authority to the customer in the **SPEC 2000 Code** and enter the **SITA/ARINC** code given to the customer.
7. Select the airline operator code of the customer in the **Operator #** field.
8. Use the drop-down list box to specify whether multiple operators are allowed for the given customer in the **Multiple Operators?** field.
9. Enter the **User Name** of the customer.
10. Select the type of the service provided to the customer in the **Engagement Type** drop-down list box.
11. Use the **Numbering Type** drop-down list box to select the numbering type for the automatic generation of Customer #. The drop-down list box displays options depending on the definition of the process parameter "Automatic Customer # Generation" under the entity "MRO Sales" in the Set Sales Process Parameters" activity.

The drop-down list box displays:

- Manual, if the process parameter value is 0
- All Active numbering types mapped to transaction "Automatic Customer # Generation", if the process parameter value is 1.

12. Use the **Customer Category** drop-down list box to select the category of the customer and enter the **Prospect #** identifying unregistered customer. In the **Trade Regulatory Compliance** group box, enter the date on which ITAR compliance by the customer was last reviewed in the **Last Reviewed Date** field.
13. Enter **Valid Till Date** to indicate the expiry of ITAR compliance.

To copy customer details,

14. Enter the code of the customer whose details you wish to copy, in the **Customer #** field.
15. Select the **Sales Point** with which the customer is associated.
16. Check the appropriate boxes under Copy Options to copy customer main information, address ID information, payment receipt details, commercial information, customer task master list, sales point information, pricelist information, customer part information, certificate information, default bill to or ship to customer information and TCD details.
17. Specify the **Additional Details** of the customer which includes **Nature of Customer**, **BU**, **Company #**, **Partner ID** and **Nature of Relationship**.
18. Check the "Auto Gen. CO against Intercompany RO" checkbox if you require auto generation of customer order in the event of repair order generation.
19. Indicate the level at which the credit checking for the customer must be done, in the **Credit Checking At** drop-down list box. Select "Customer" option to indicate that the credit checking must be done at customer level. You can select "Up the Hierarchy" to indicate that the credit checking must be done at all parent customer nodes up the customer hierarchy. Select "Total Hierarchy" for the credit checking to be done at all customer nodes in the hierarchy.
20. Enter the **Customer Account Group** to identify the account group associated to the customer.

    Note: You can enter this field, only when the option setting "Account Group in Customer master" is set as "Allowed" in the "Set Options" activity of the "Account Group" business component.

21. Furnish the Address ID Details of the customer, like **Address ID, Address Line 1, City, Zip Code, State, Country #, LC Applicable?, Tax Region, Address Category Phone, E-Mail, Fax, SPEC 2000 Code, SITA/ARINC, INCO Terms** and related details including **Delivery Area #.**and related details along with the **Delivery Area Code**.
22. In the **Document Attachment Details** group box enter the **File Name** which you wish to view.
23. Enter **Remarks** pertaining to the customer.
24. Click the **Create Customer** pushbutton, to create the customer.

To enter further information,

- Select the **Edit Payment Receipt Details** link to enter payment receipt details for the customer.
- Select the **Edit Commercial Details** link to furnish the commercial information of the customer.
- Select the **Edit Sales Point Details** link to enter the sales point information for the customer.
- Select the **Manage Additional Options** link to define various operating parameters
- Select the **Edit Customer Part Master Lists** link to enter details of the parts supplied by the supplier for maintenance service execution.
- Select the **Edit Customer Tax & Charges Information** link to enter the tax and charge information for the customer**.**
- Select the **Edit Customer Additional Information** link at the bottom of the page to enter the additional details for the customer.

- Select the **Maintain Entity Level Identification Ref.** link at the bottom of the page to record the supplier's tax registration number at a tax region level.

Entering payment receipt information for the customer

You can enter details pertaining to the payment receipt of the customer. You can enter VAT information, invoice information, preferred receipt type details, Bank ESR or PTT ESR details, LSV and Specific Bank details.

1. Select the **Edit Payment Receipt Details** link in the **Create Customer Record** page. The Edit Payment Receipt Details page appears. *See Figure 2.3.*
2. Enter the **VAT Information** for the customer.
3. Furnish **Invoice Information** that includes **Company's Bank Account No, Customer's Bank** and **Customer's Bank Account No**.
4. Select the **Receipt Mode** of the payment.
5. Enter the **Customer's PTT Account No** in the **Preferred Receipt Type** group box.
6. Check the **Bank ESR** or **PTT ESR** box, to indicate the preferred receipt type of the customer.
7. Furnish the **Bank ESR Details** or **PTT ESR Details**.

To enter LSV and Specific Bank Details,

8. Select the **Receipt Method**, which could be "LSV" or "Specific Bank".
9. Set the **Default** field to "Yes" if you wish to set the multiline row as default for "LSV" or "Specific Bank" receipt method.
10. Select the bank or PTT account code in the **Bank #** drop-down list box.
11. Specify **LSV Contract ID** and **Contract Reference**. Also specify the period for which the LSV contract is effective, in the **Effective From** and **Effective To** fields.
12. Enter the **Customer's Bank Account No.** and **Customer's Bank Reference** fields.
13. Click the **Edit Details** pushbutton to update customer payment receipt information.

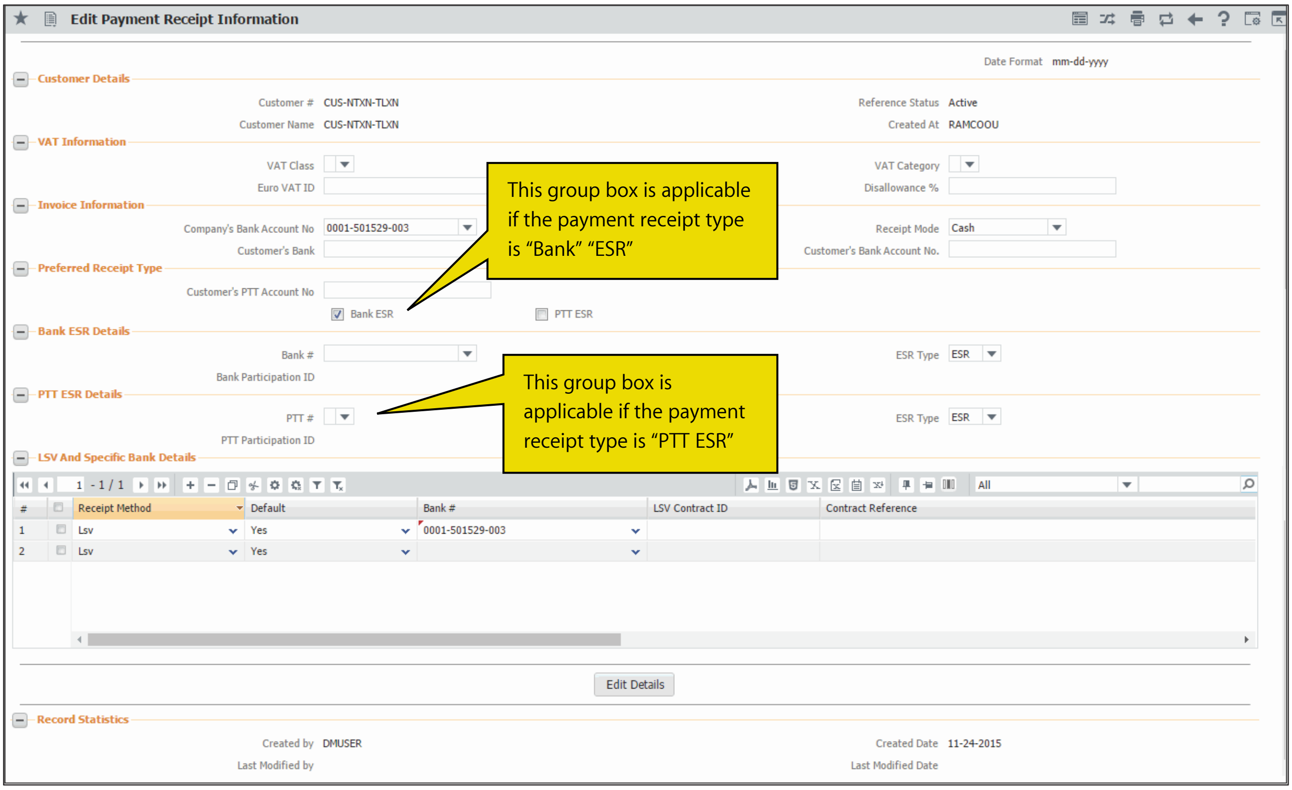


Figure 2.3 Entering payment receipt details for the customer

Editing the commercial information for the customer

You can enter the business or commercial information pertaining to the customer.

1. Select the **Edit Commercial Details** link in the **Create Customer Record** page. The **Edit Commercial Information** page appears. *See Figure 2.4.*

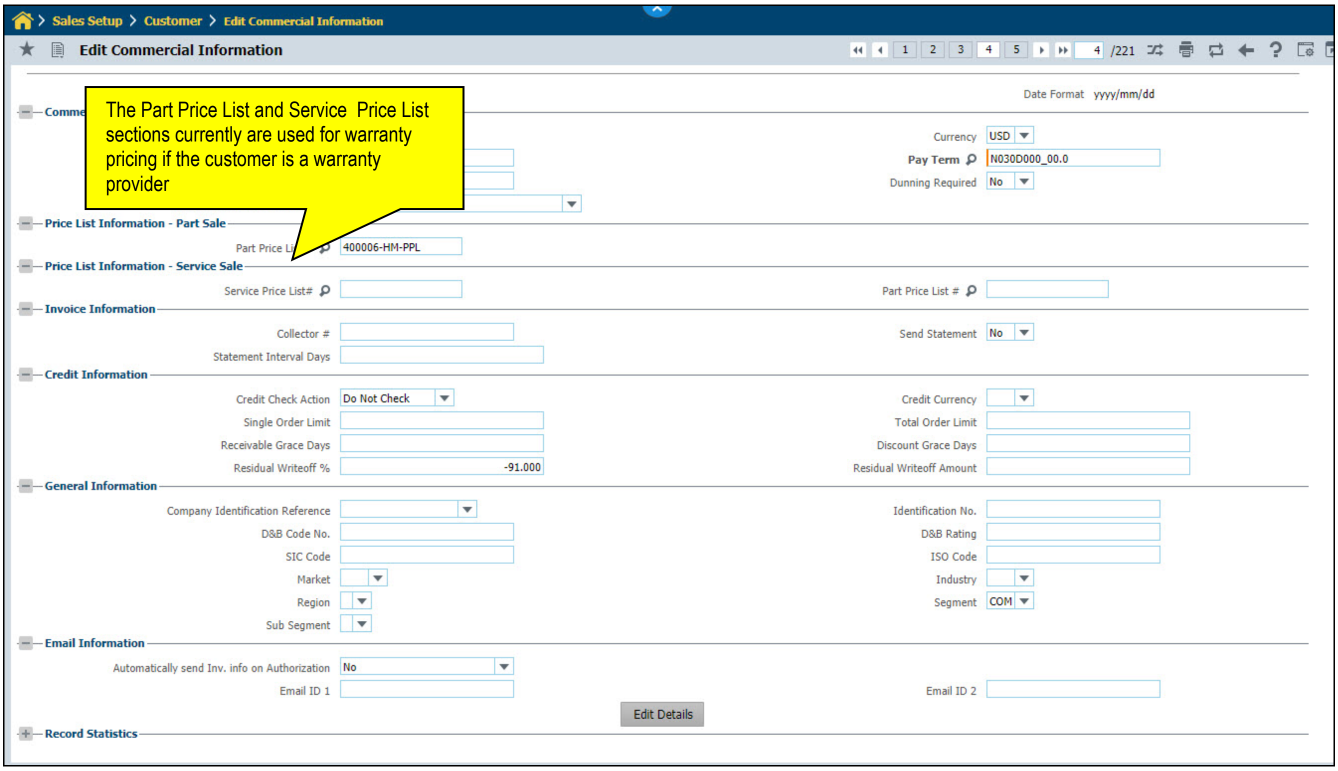


Figure 2.4 Entering commercial information for the customerD

2. Identify the **Customer Type**, **Currency**, **Credit Term Code**, **Pay Term**, **Tax Payer ID No**. and **Dunning Required** for the customer, in the Commercial Information group box.

3. Use the drop-down list box to specify the **Credit Check Action** for the customer. The system list the following option “Do Not Check”. Select this option if you do not wish to perform credit checking.

   Note: The system displays “Do Not Check” by default.

   Note: Do not select “Do Not Check”, if Single Order limit and/or Total Order Limit is specified.

4. Use the drop-down list box to select the **Credit Currency** applicable for the customer. The system lists the base currency defined in the “EMOD” business component, along with the value set as default or selected in the “Currency” field in the header.

5. Indicate whether dunning is required or not, by selecting “Yes” or “No” in the **Dunning Required** field.

6. Specify the **Single Order Limit**, **Total Order Limit**, **Receivable Grace Days** and **Discount Grace Days** for the credit.

   Note: If “Single Order Value Limit” or “Total Order Value Limit” is entered, then data selection in “Currency” field is mandatory.

7. Enter the **Residual Writeoff** % field to specify the residual write-off percentage specified for the payment made by the customer. Enter the amount that corresponds to the residual write-off percentage in the **Residual Writeoff Amount** field.

8. Furnish the general commercial information of the customer such as the **Company Identification Reference**, **Identification No.**, **D & B Code No.**, **D & B Rating, SIC Code** and market and industry details.

9. Use the **Email Information** section to automatically send e-mail upon authorization to a designated user along with details and the Invoice report attached to the mail.

10. Click the **Edit Details** pushbutton to update the commercial information of the customer.

Managing additional options

The activity enables you to define various operating parameters for each Customer the transaction varies. For example, you can also set an attribute as not required or required for a parameter.

1. Select the **Manage Additional Options** link in the **Create Customer Record** page. The **Manage Additional Options** page appears. *See Figure 2.5*

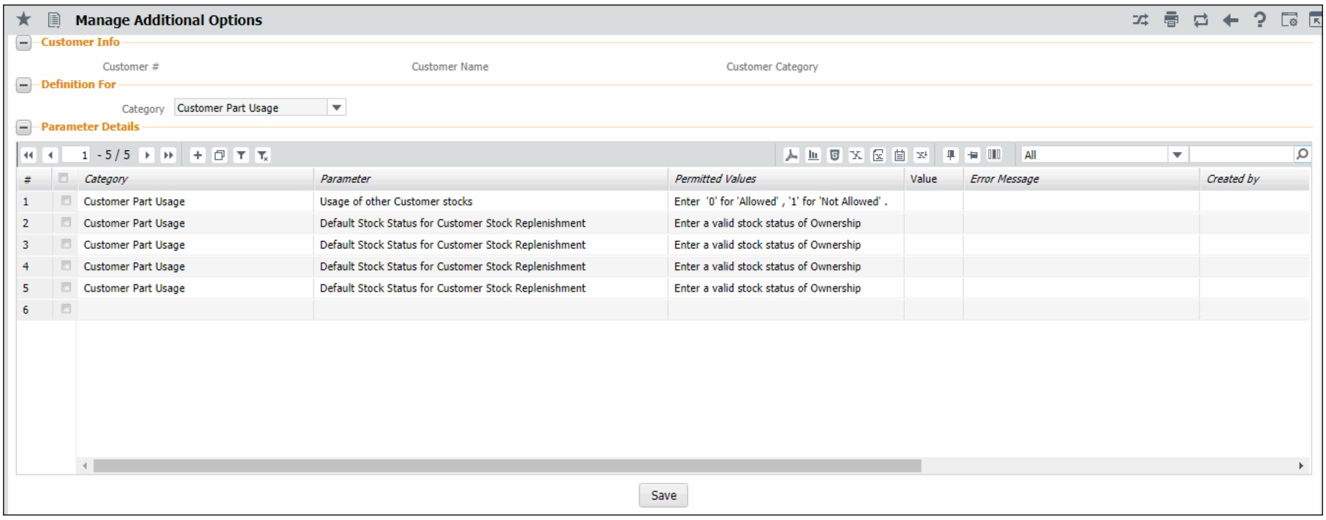


Figure 2.5 Manage Additional Options

2. Use the drop-down list box to specify the **Category** to define operating parameters.
3. Enter the value for the parameter in the **Value** column in the **Parameter Details** multiline
4. Click **Save** pushbutton to save the record.

Entering part master details for a customer

You can define details of the parts supplied by the supplier for executing the maintenance service.

1. Select the **Edit Customer Part Master List** link in the **Create Customer Record** page. The **Edit Part Supplied by Customer** page appears. *See Figure 2.6.*

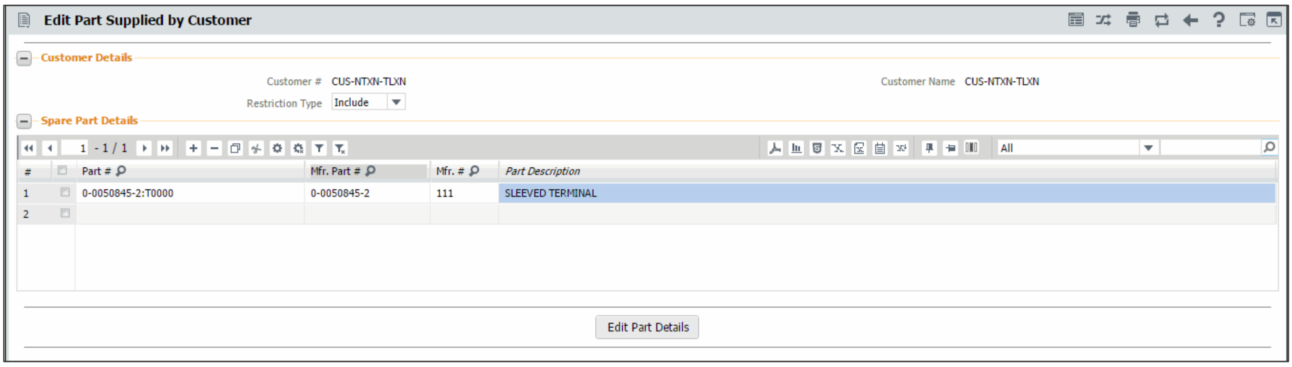


Figure 2.6 Entering customer part master list

2. Use the **Restriction Type** drop-down list box to specify whether the parts are supplied by the customer or not. The system lists the following options:
   - **Exclude** – Select this option to indicate that the parts are not supplied by the customer.
   - **Include** – Select this option to indicate that the parts are supplied by the customer.

   Note: The system displays "Include" by default.
3. Enter the **Mfr. Part #** and **Mfr. #**.

Note: Ensure that at least one record is entered in the multiline.

4. Click the **Edit Part Details** pushbutton to update the customer part master list.

Entering tax and charge information for the customer

This page enables you to maintain information on TCD, VAT and tax registration for the customer.

1. Select the **Edit Customer Tax & Charges** link in the in the "Edit Customer Main Information" page. The "**Maintain Customer TCD Mapping**" page appears. *See Figure 2.7*

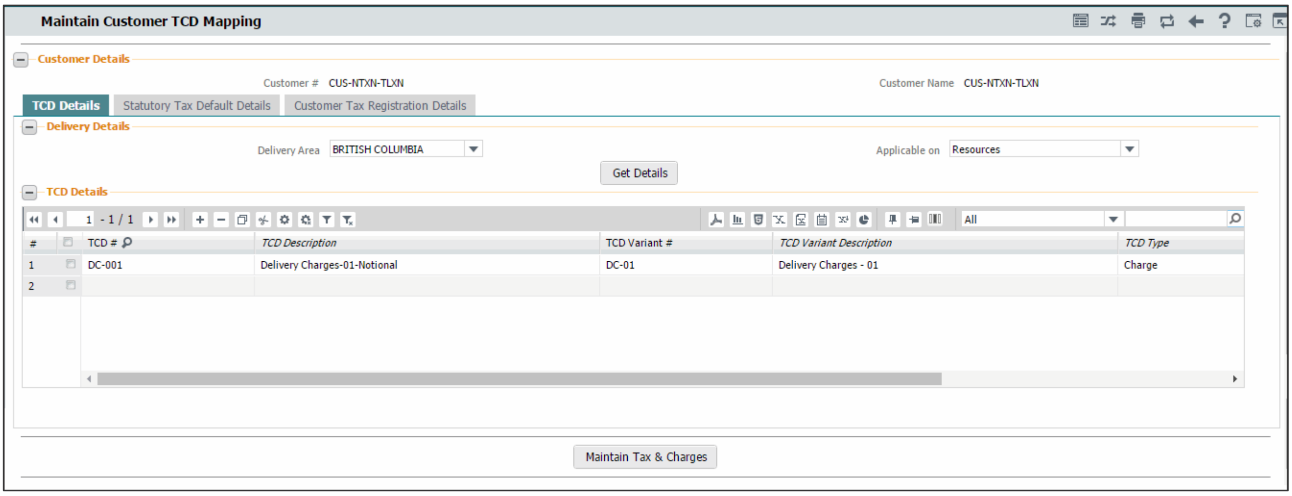


Figure 2.7 Entering customers TCD mapping

2. Select the **TCD Details** tab.

3. In the **Delivery Details** group box, use the drop-down list box to specify the **Delivery Area** to which the goods are delivered. The system lists all the active delivery areas as defined in the "Delivery Area" business component.

   Note: Leave this field blank, if you wish to deliver the goods irrespective of the delivery area. The system leaves the field blank by default.

4. Use the **Applicable on** drop-down list box to specify the applicability of the TCD. The system lists the following options:
   - Material - Select this option if the TCD is applicable only for materials.
   - Services - Select this option if the TCD is applicable for services.
   - Order Level - Select this option if the TCD is applicable for customer order level. The system displays "Order Level" by default.

   Note: You cannot modify the values selected in the "Delivery Area" and "Applicable On" fields.

5. Click the "**Get Details**" pushbutton to retrieve the TCD details defined for the customer.

6. Enter the code identifying the **TCD #**.

   Note: Ensure that the TCD number entered here is a valid code as defined in "TCD" business component, and is in active status. Data entry in this field is mandatory, if TCD variant number is entered.

   Note: You cannot modify the TCD number.

7. Enter the **TCD Variant #.**

   Note: Ensure that the TCD variant number entered here is a valid code as defined in "TCD" business component, and is in active status. Data entry in this field is mandatory, if TCD number is entered.

   You cannot modify the TCD variant number.

   Ensure that the TCD# - TCD Variant# is a valid combination as defined in TCD master, and is unique for the same "Applicable On" and "Delivery Area" combination.

8. Use the **Billable?** drop-down list box to specify whether the TCD is billable or non-billable. The system lists the options “Yes” or “No”. The system displays “Yes” by default.
9. Select the Statutory Tax Default Details tab.
10. In the **Default Details** group box, enter the **Tax #** and **Tax Variant #**.
11. Select the **Get** pushbutton to display attributes set for the specified tax key.
12. Select the **Customer Tax Registration Details** tab.
13. In the **Tax Registration Details** multiline, enter the **Address ID**, **Tax Type** and **Registration #** for the customer.
14. Click the **Maintain Tax & Charges** pushbutton to update the TCD details for the customer.

Managing restricted stock status

This page enables you to maintain information on TCD, VAT and tax registration for the customer. You can map the list of stock statuses that are to be restricted to each Customer.

> *Note that the stock status mapped to a customer must be unique and cannot be reused for another customer.*

> *Note that defining restricted stock status is not mandatory. Customer can be made Active even without defining restricted stock status.*

1. Select the **Manage Restricted Stock Status** link in the in the “Create Customer Record” or “Edit Customer Main Information” page. The ”**Manage Restricted Stock Status**” page appears. *See Figure 2.8.*

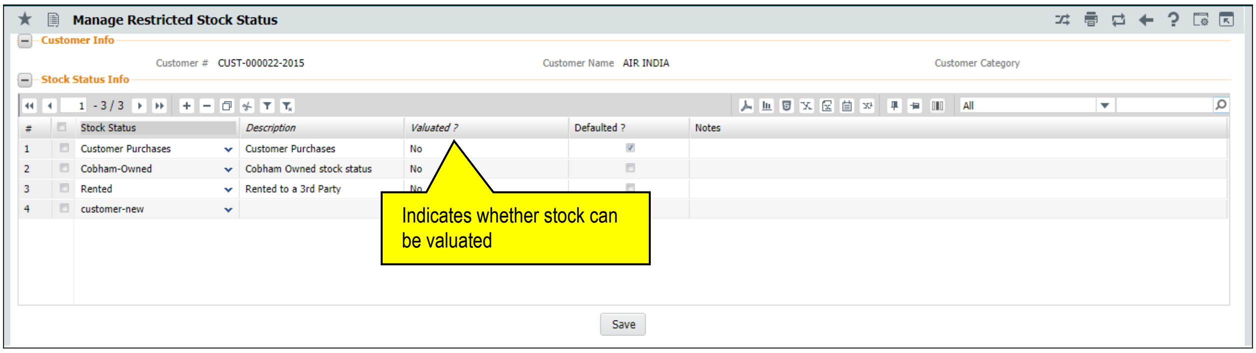


Figure 2.8 Managing Restricted Stock Status

In the **Stock Status Info** multiline:

2. Use the **Stock Status** drop down list box to select the user defined stock status.
3. Select whether stock status is to be considered in transactions for the specified customer in the **Defaulted?** Column
4. Provide any additional comment pertaining to the stock status that is mapped in the **Notes** column.
5. Click the **Save** pushbutton to save the stock status mapped against the specified customer.

Managing customer part sale parameters

This page maps the key parameters for a customer with a particular sale type.

1. Select the **Manage Customer Part Sale Parameters** link in the “Edit Customer Record” page. The ”**Manage Customer Part Sale Parameters**” page appears. *See Figure 2.8.*

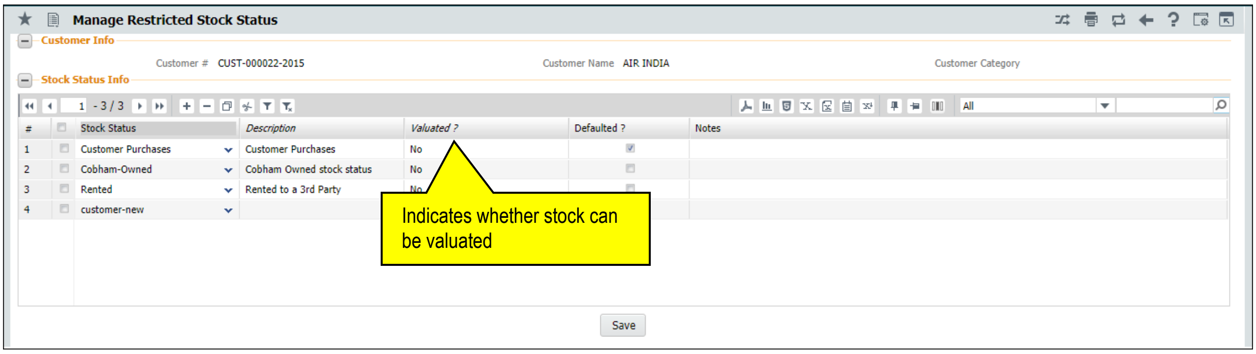


Figure 2.8 Managing Restricted Stock Status

In the **Stock Status Info** multiline:

2. Use the **Stock Status** drop down list box to select the user defined stock status.
3. Select whether stock status is to be considered in transactions for the specified customer in the **Defaulted?** Column
4. Provide any additional comment pertaining to the stock status that is mapped in the **Notes** column.
5. Click the **Save** pushbutton to save the stock status mapped against the specified customer.

2.2 GROUPING CUSTOMER

Customers can be grouped under a single entity called "Customer Group". The grouping of customer is primarily done for the purpose of dunning, pricing or billing. It can also be done for review and analysis.

2.2.3 CREATING CUSTOMER GROUP

Customer groups can be classified as controlled groups or user-defined groups.

- Controlled groups – Facilitates grouping of customers under a predefined group type in the system. For example, customers who are liable to pay taxes and charges on the sale can be grouped under the controlled group type named "TAX". You can associate taxes and charges rules (defined at both document and item level) with this group for taxation purposes.
- User-defined groups – Facilitates grouping of customers according to user requirements. For example, you can group customers who share the same location under a customer group termed as "Location".

1. Select **Create Customer Group** under **Customer** business component. The **Create Customer Group** page appears. *See Figure 2.9*.

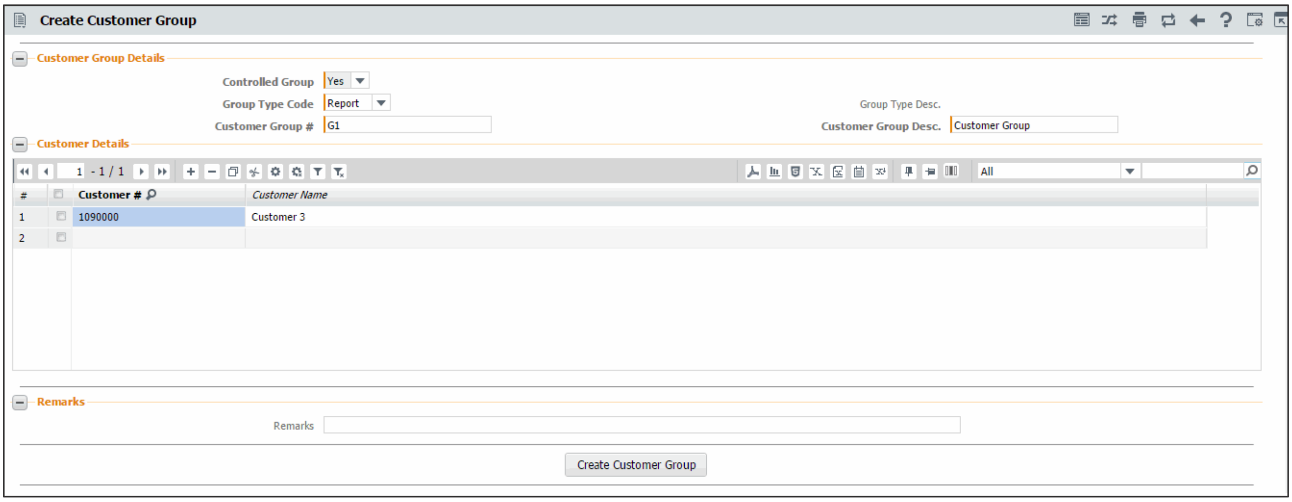


Figure 2.9 Creating customer group

2. In the **Customer Group Details** group box, select "Yes" in the **Controlled Group** field to indicate that the customer group is a controlled group. Else select "No".
3. Select the group type to which the customer belongs, in the **Customer Group Type** drop-down list box.
4. Enter a unique code for the customer group in the **Customer Group #** field.
5. Enter the description in the **Customer Group Desc** field.
6. Enter the code identifying the customer who must be associated with the customer group in the **Customer #** field.
7. Enter the **Remarks** pertaining to the customer group.
8. Click the **Create Customer Group** pushbutton to create the customer group details.

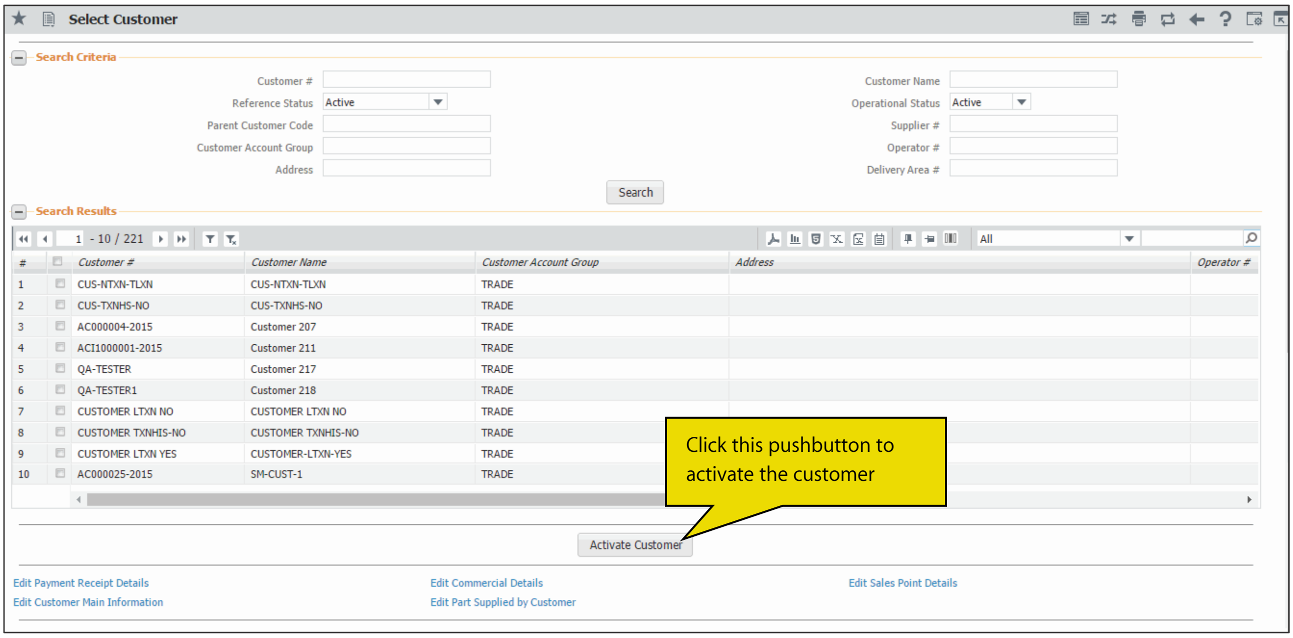
2.3 ACTIVATING CUSTOMER

A customer record must be activated for enabling the recording of sales point specific information. You can activate a customer record either during creation or modification.

1. Select "Active" in the **Reference Status** drop-down list box of the **Create Customer Record** page, to activate the customer during creation.

Or

2. Select **Edit Customer Record** under **Customer** business component. The **Select Customer Record** page appears. *See Figure 2.10.*



#	Customer #	Customer Name	Customer Account Group	Address	Operator #
1	CUS-NTXN-TLXN	CUS-NTXN-TLXN	TRADE		
2	CUS-TXNHS-NO	CUS-TXNHS-NO	TRADE		
3	AC000004-2015	Customer 207	TRADE		
4	ACI1000001-2015	Customer 211	TRADE		
5	QA-TESTER	Customer 217	TRADE		
6	QA-TESTER1	Customer 218	TRADE		
7	CUSTOMER LTXN NO	CUSTOMER LTXN NO	TRADE		
8	CUSTOMER TXNHIS-NO	CUSTOMER TXNHIS-NO	TRADE		
9	CUSTOMER LTXN YES	CUSTOMER-LTXN-YES	TRADE		
10	AC000025-2015	SM-CUST-1	TRADE		

Figure 2.10 Activating customer record

3. Search for the customer records that must be activated, by specifying the **Search Criteria**.

4. Select the customer record (s) in the **Search Results** multiline and click the **Activate Customer** pushbutton to activate the customer record. The system updates the "Reference Status" of the customer as "Active".

2.4 MAINTAIN AUTOMATION RULES

2.4.1 MAINTAIN AUTOMATION RULES FOR CUSTOMER REQUESTS

This activity enables the user to define rules that will either automate/ not-automate the customer request to an order, when the request is for part sales or repair or exchange. Rules can be set based on which customer requests can be automatically processed into an order

1. Select **Maintain Automation Rules For Customer Requests** activity in the **Customer** business component.

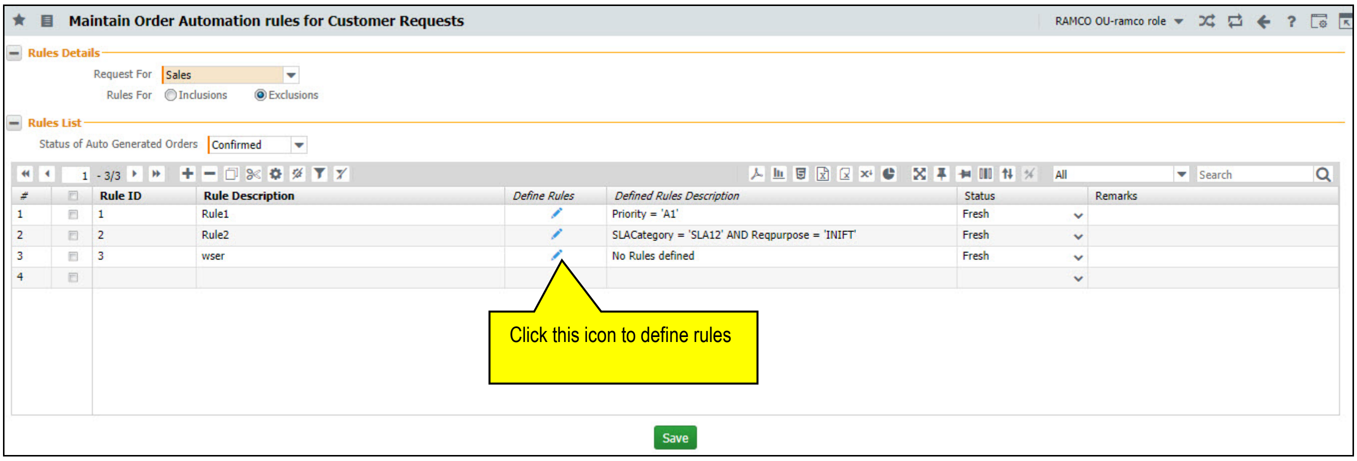


Figure 2.11 Maintaining automation rules for customer requests

2. Select the type of business against which rules are to be defined for in the **Request For** drop-down list box which could be Sales, Repair or Advance Exchange.
3. Select type of rules being defined from the **Rules For** radio buttons from the options Inclusions – indicating only requests set under this option will be automated into an order or Exclusions – Indicating that the requests set under this option will not be automated into an order.
4. Select the **Status of Auto Generated Orders** in the Rules List section. You can select from the options, Confirmed, Approved or Fresh.
5. Enter details in the 'Rules List' multiline like **Rule ID** and **Rule Description**
6. Click the **Define Rules** icon to define rules.
7. Click the **Save** pushbutton to save the defined rules.

2.5 MAINTAIN INCO TERMS

2.5.1 MAINTAINING AGREED INCO TERMS

This activity allows you to maintain INCO terms for covered locations under customer/contract level

1. Select **Maintain Agreed INCO Terms** activity in the **Sale Contract** business component.

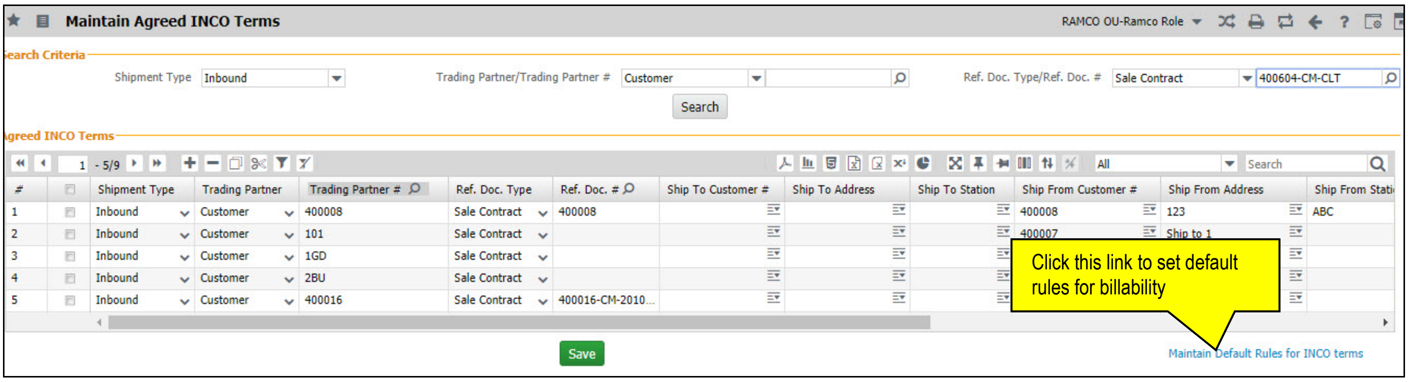


Figure 2.11 Maintaining agreed INCO Terms

2. In the **Search Criteria**, enter details **Shipment Type**, **Trading Partner/Trading Partner #** and **Ref. Doc. Type/Ref. Doc. #** based on which you wish to retrieve details in the multiline and click the **Search** pushbutton.

3. Enter details of shipment of parts like **Ship To Customer #**, **Ship To Address** and **Ship To Station** and other details in the 'Agreed INCO' Terms multiline.

4. Click the **Save** pushbutton to save the maintain INCO Terms definition.

5. Select the **Maintain Default Rules for INCO Terms** link at the bottom of this activity to set the default rules for billability for each INCO term at each customer or customer/contract combination level.

2.5.2 MAINTAINING DEFAULT RULES FOR INCO TERMS

This activity allows you to maintain INCO terms for covered locations under customer/contract level

1. Select **Maintain Default Rules for INCO Terms** link at the bottom of the Maintain Agreed INCO Terms activity under the **Sale Contract** business component.

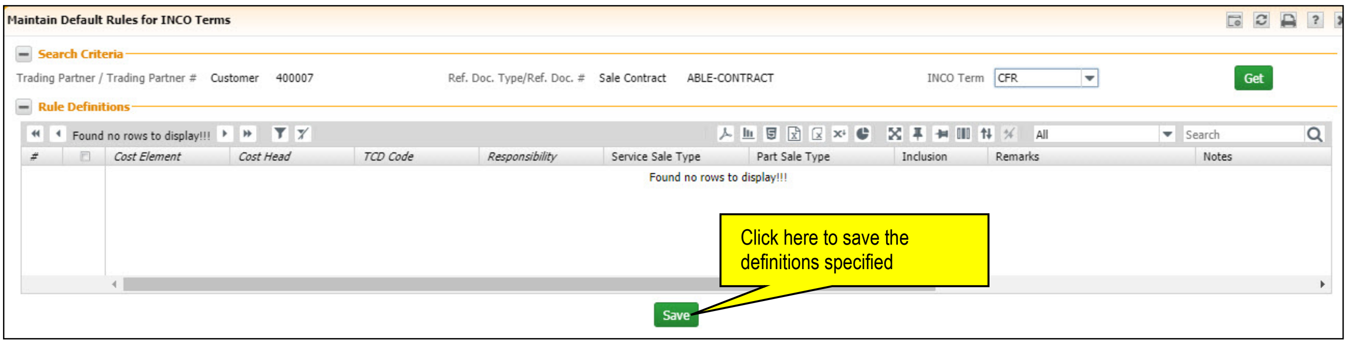


Figure 2.13 Maintaining default rules for INCO Terms

2. Use the INCO Term drop-down list box In the **Search Criteria** to specify the INCO Terms for which you wish to define billability rules and **c**lick the **Get** pushbutton, to retrieve the details in the multiline.

3. In the Rule Definitions multiline, specify the **Service Sale Type** and **Part Sale Type** based on which billability of expenses is defined and provide the **Inclusions, Notes** and **Remarks**.

4. Click the **Save** pushbutton to save the details entered.

2.6 MANAGE PRICE ESCALATIONS

2.6.3 MANAGING PRICE ESCALATIONS

This activity facilitates you to record/update//view/cancels price escalations with regard to sale contracts, part pricelists and service pricelists. You can manage escalation rates at contract/pricelist level along with an Effectivity period in which the update /revised prices would become automatically valid. You can define price escalation rates based on the following:

Pricing Basis for contracts

Pricing Element/ Resource Type in service/part pricelists

Note that the system will automatically revise/update prices in contracts/pricelists based on the price escalations for the effective period defined in this activity based on option settings,

1. Select **Manage Price Escalations** activity in the **Sale Contract** business component.

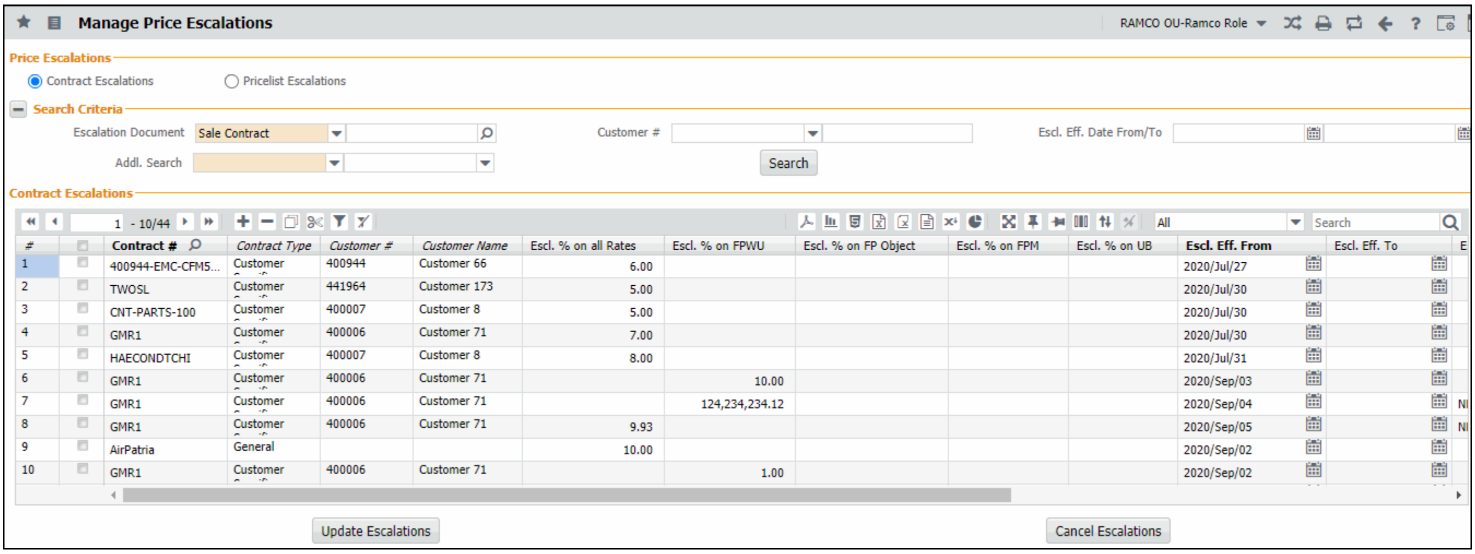


Figure 2.14 Managing price escalations

In the **Price Escalation** group box:

2. Select the **Contract Escalations** radio button. to work with price escalation related to sale contracts or select the **Pricelist Escalations** radio button to work with price escalations related to part service pricelists.

In the **Search Criteria** group box:

3. Enter the **Escalation Document** whether Sale Contract or Part Pricelist and other details based on which you wish to retrieve details in the multiline,
4. Click the **Search** pushbutton to retrieve escalation documents that meet the filters specified in the criteria.

In the Contract Escalations multiline:

5. Enter the **Contract #** of the sale contract against which you want to record/update/remove price escalations.
6. Specify the start date of the period in which the escalated prices are effective in the **Escl. Eff. From** column and provide the other details.
7. Select the **Update Escalations** pushbutton to save the details recorded in the multiline.
8. Select the **Cancel Escalations** pushbutton deleted the selected escalation record,

Note: You cannot cancel an escalation record, if it has already been processed (i.e. Processing Remarks = Escalation Processed).

2.7 MANAGE SLA/CORE RETURN RULES

2.7.4 MANAGING SLA / CORE RETURN RULES

This activity allows you to set various rules that are agreed upon in a contract. Note that currently the SLA & Core return rules can be set only for the following types of services, currently: Sourcing and Acknowledgement

1. Select **Manage SLA/Core Return Rules activity** in the **Customer** business component.

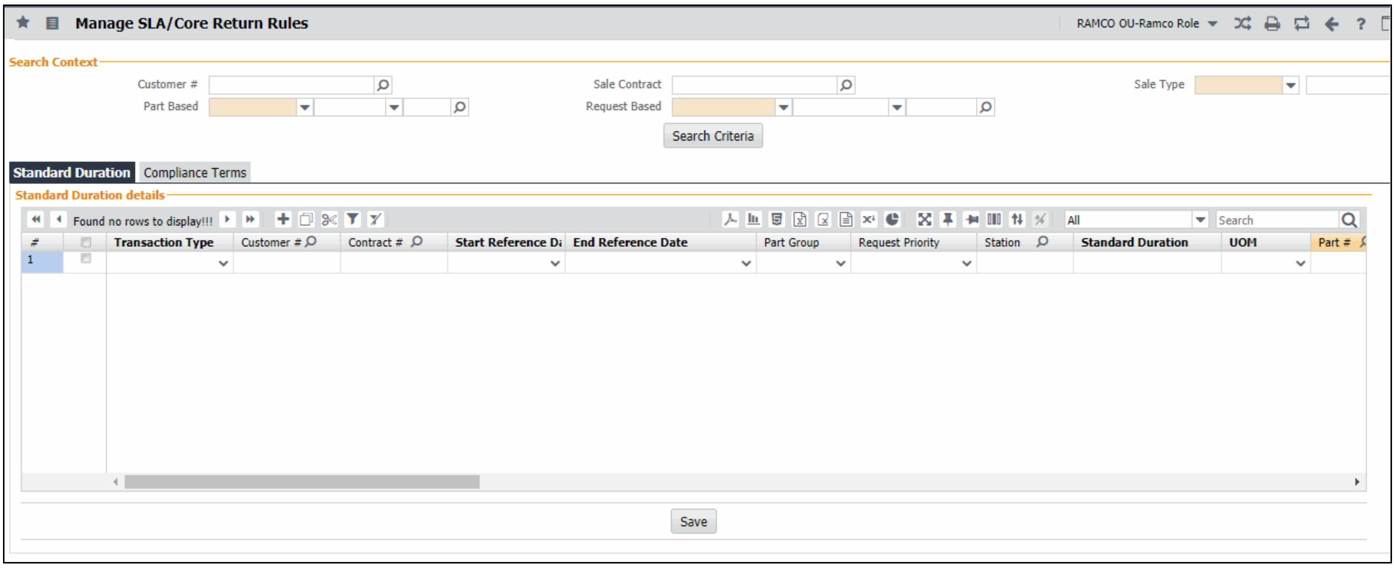


Figure 2.15 Managing SLA/Core Return Rules

2. Enter the **Term For** to specify the type of service for which you wish to set SLA and Core Return Rules. You can select from the following options:

   Sourcing

   Returns

   Acknowledgement

In the **Search Context** group box,

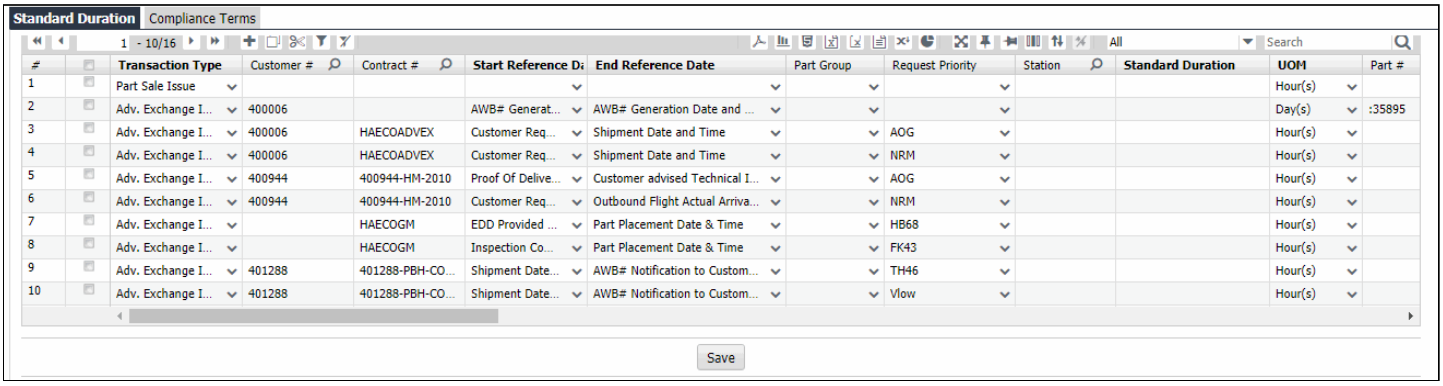
3. **Enter the Customer #. Sale Contract**, **Sale Type**. **Part Based** and **Request Based** filter criteria based on which you wish to retrieve details in the multiline.
4. Click the **Search Criteria** pushbutton to retrieve the search results in the multiline
5. Select the **Standard Duration Details** tab to set various rules against Customer #, Contract #, Sale types, various Part and Request based entities.
6. Select the **Compliance Terms** tab to set the Compliance % similar to how the Standard Duration Terms were set.

Recording standard duration

This tab allows you to set various rules against Customer #, Contract #, Sale types, various Part and Request based entities.

> *Note: All these rules can be set for the Start and End Dates for the respective transaction and the corresponding time for the set transactions can be defined in 'Standard Duration' field in the tab.*

1. Select the **Standard Duration** tab page in the **Manage SLA/Core Return Rules** activity in the **Customer** business component.



Standard Duration | Compliance Terms

#	Transaction Type	Customer #	Contract #	Start Reference Da	End Reference Date	Part Group	Request Priority	Station	Standard Duration	UOM	Part #
1	Part Sale Issue									Hour(s)	
2	Adv. Exchange I...	400006		AWB# Generat...	AWB# Generation Date and ...					Day(s)	:35895
3	Adv. Exchange I...	400006	HAECOADVEX	Customer Req...	Shipment Date and Time		AOG			Hour(s)	
4	Adv. Exchange I...	400006	HAECOADVEX	Customer Req...	Shipment Date and Time		NRM			Hour(s)	
5	Adv. Exchange I...	400944	400944-HM-2010	Proof Of Delive...	Customer advised Technical I...		AOG			Hour(s)	
6	Adv. Exchange I...	400944	400944-HM-2010	Customer Req...	Outbound Flight Actual Arriva...		NRM			Hour(s)	
7	Adv. Exchange I...		HAECOGM	EDD Provided ...	Part Placement Date & Time		HB68			Hour(s)	
8	Adv. Exchange I...		HAECOGM	Inspection Co...	Part Placement Date & Time		FK43			Hour(s)	
9	Adv. Exchange I...	401288	401288-PBH-CO...	Shipment Date...	AWB# Notification to Custom...		TH46			Hour(s)	
10	Adv. Exchange I...	401288	401288-PBH-CO...	Shipment Date...	AWB# Notification to Custom...		Vlow			Hour(s)	

Save

Figure 2.16 Recording standard duration

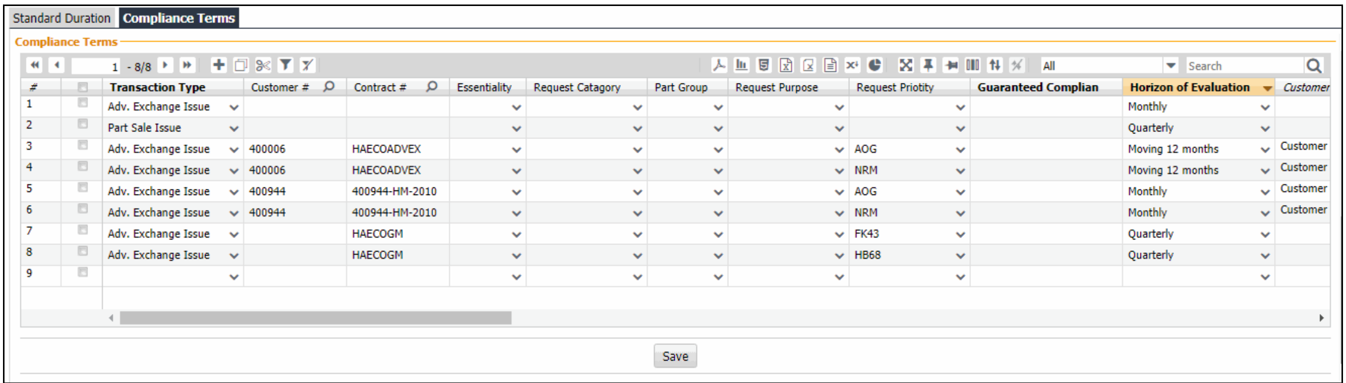
2. Use the **Transaction Type** drop-down list box to select the type of transaction for which SLA and Core rules is to be set.
3. Enter the SLA start and End reference in the **Start Reference Date** and **End Reference Date** columns.
4. Specify the duration which is required to comply with the SLA in the **Standard Duration** column.
5. Provide the unit of measurement in the **UOM column.**
6. Enter the **Sys. Start Reference Date** and **Sys. End Reference Dates**.
7. Enter the starting date from which the defined Standard duration terms of the SLA/Core Return rules is effective in the **Effective From** column**.**
8. Select the Save pushbutton to record the standard duration details.

Recording compliance terms

This tab enables you to set the Compliance % similar to how the Standard Duration Terms were set. The compliance terms can be set for the rules that have been defined in 'Standard Duration' tab.

Note that Export and Import options have been provided in order to upload bulk data at once.

1. Select the **Compliance Terms** tab page in the **Manage SLA/Core Return Rules** activity in the **Customer** business component.



Standard Duration | Compliance Terms

Compliance Terms

#	Transaction Type	Customer #	Contract #	Essentiality	Request Catagory	Part Group	Request Purpose	Request Priotity	Guaranteed Complian	Horizon of Evaluation	Customer
1	Adv. Exchange Issue									Monthly	
2	Part Sale Issue									Quarterly	
3	Adv. Exchange Issue	400006	HAECOADVEX					AOG		Moving 12 months	Customer
4	Adv. Exchange Issue	400006	HAECOADVEX					NRM		Moving 12 months	Customer
5	Adv. Exchange Issue	400944	400944-HM-2010					AOG		Monthly	Customer
6	Adv. Exchange Issue	400944	400944-HM-2010					NRM		Monthly	Customer
7	Adv. Exchange Issue		HAECOGM					FK43		Quarterly	
8	Adv. Exchange Issue		HAECOGM					HB68		Quarterly	
9											

Save

Figure 2.17 Recording compliance terms details

2. Use the drop-down list box to select the type of transaction for which SLA and Core rules is to be set. In the **Transaction Type** column**.**
3. Specify the compliance % for the defined terms in the **Guaranteed Compliance** column
4. In the **Horizon of Evaluation** column, enter the interval of the compliance terms which are to be applied.
5. Enter the starting date from which the defined Compliance terms of the SLA/Core Return rules is effective in the **Effective From** column**.**
6. Click the **Save** pushbutton to record the compliance terms.

2.8 RECORDING SALES POINT SPECIFIC INFORMATION FOR CUSTOMER

The information specific to a customer sales point can be recorded against every customer. A sales point is a location where the orders and other transactions related to customer are processed. You can enter the information such as carrier, delivery area, currency, pricelist, and addresses for Bill To location, Ship To location and Order from locations for a customer.

2.8.1 ENTERING SALES POINT DETAILS FOR A CUSTOMER

Note: You can enter the sales point information only for a customer record in "Active" reference status.

1. Select **Maintain Customer Record at Sales Location** under **Customer** business component. The **Select Customer** page appears.
2. Enter the customer code directly in the **Customer #** field and select **Edit Sales Point Information** link to enter sales point information for the customer. Or, specify **Search Criteria** and click the **Search** pushbutton to search for customer records.
3. Click the hyperlinked **Customer #** in the multiline for entering sales point information for the customer. The **Edit Sales Point Information** page appears. *See Figure 2.11.*

   *Note: You can also select the **Edit Sales Point Details** link in the **Create Customer Record** page for entering sales point details.*

4. To inactivate the customer, select the customer record and click the **Inactivate Customer** pushbutton.

To enter sales point information,

5. Set the **Operational Status** of the customer to "Active" in order to make the customer record available for all transactions.

To copy sales point information,

6. Select the **Sales Point** that you wish to copy.
7. Check the appropriate boxes in the **Copy Options** to copy the relevant sales point information.

To specify invoice information,

8. Select "Yes" in **Automatic Invoice Authorization** field to indicate that the customer invoice can be automatically authorized.
9. Specify whether the freight charge is billable to the customer or not, by selecting the appropriate option in the **Freight Billable** drop-down list box.
10. Indicate that the customer is eligible for rebate by selecting "Yes" in **Eligibility For Rebate** drop-down list box.
11. Select "Yes" in **Tax Exempt** drop-down list box, to allow tax exemption for the customer and enter the **Tax Exempt Certificate No.**, if any.
12. Specify whether invoice is applicable for the customer, in the **Invoice Applicable** field. Enter the **No. Of Invoice Copies** field, if the invoice is applicable.

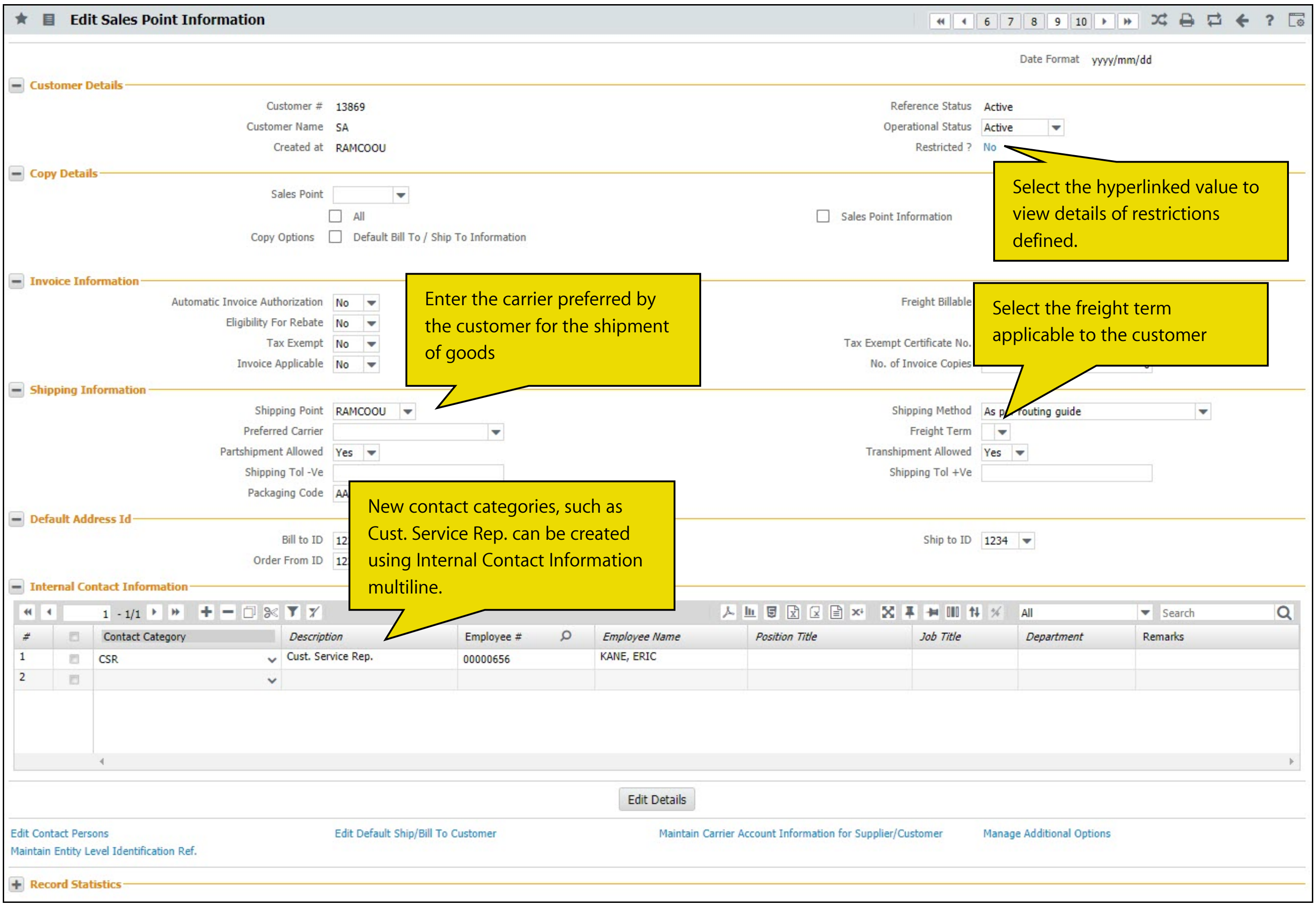


Figure 2.18 Entering sales point information for customer

To enter shipping information,

13. Select the **Shipping Point** from where the goods are shipped.
14. Select the mode of transportation of goods in the **Shipping Method** drop-down list box.
15. Indicate whether the shipment can take place in parts by selecting the relevant option in **Part shipment Allowed** drop-down list box.
16. Indicate whether the goods can be dispatched through different transportation modes, by selecting the relevant option in **Transhipment Allowed** drop-down list box.
17. Enter the positive and negative shipping tolerance values in the **Shipping Tol –ve** and **Shipping Tol +ve** fields.
18. Select the default address ID to which the invoices, debit note or credit note must be sent, in the **Bill To ID** field.
19. Select the default address ID to which the goods must be shipped, in the **Ship To ID** field.
20. Select the default address ID from which the orders would be taken, in the **Order From ID** field.
21. Click the **Edit Details** pushbutton to update the sales point information.
22. In the **Internal Contact Information** multiline, use the **Contact Category** drop-down list box to select the contact category that you wish to create in the customer organization.
23. Enter **Employee #** for the employee nominated to the contact category.
24. Enter **Remarks** on the contact category/nomination/appointee.

To provide further details,

- Select the **Edit Contact Persons** link, to enter the contact person details of the customer.
- Select the **Edit Default Ship/Bill To Customer** link, to enter the inter-customer relationship information.
- Select the **Maintain Carrier Account Information for Supplier / Customer** link to capture carrier account information specific to supplier / customer.

Entering contact person information for a customer

Contact persons are to be contacted regarding any queries on requests for quotations (RFQs) or services provided by the service provider or for further follow-up regarding quotations put up by the service provider or MRO for bagging a subsequent order from the customer.

1. Select the **Edit Contact Persons** link in the **Edit Sales Point Information** page. The **Edit Contact Persons** page appears. *See Figure 2.19*.

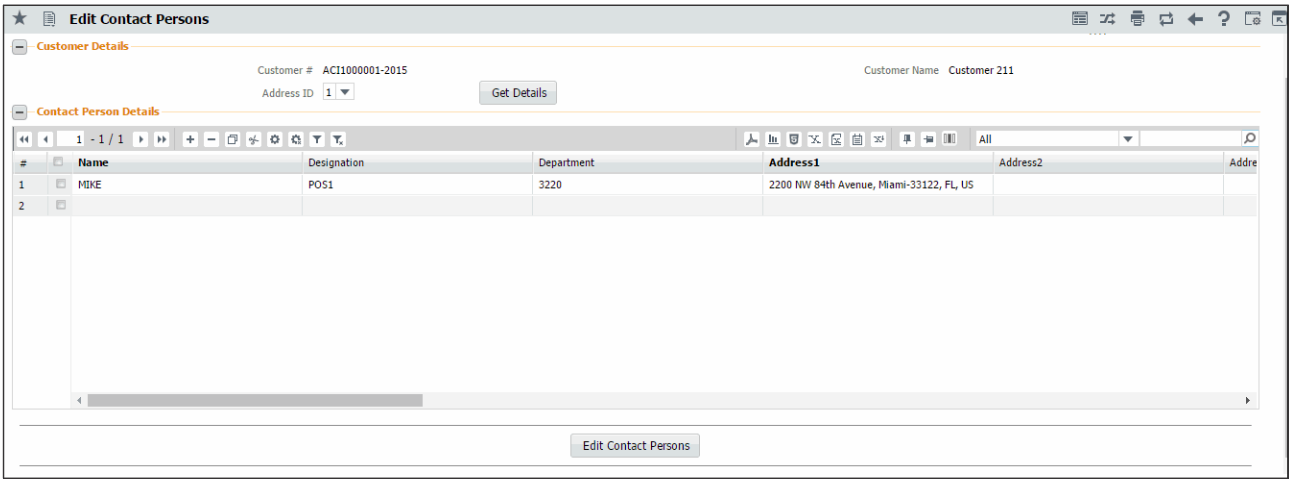


Figure 2.19 Entering contact person information

2. Select the **Address ID** for which the contact person information must be updated.
3. Click the **Get Details** pushbutton to retrieve the contact person information that is already defined for the address ID.
4. In the **Contact Person Details** multiline, enter the **Name**, **Designation and Department** of the contact person.
5. Furnish the address information in the **Address 1**, **Address 2**, **Address 3**, **City**, **Zip**, **State** and **Country** fields.
6. Enter the **Phone, E-Mail** and **Fax** fields.
7. Enter the **Visiting Hours**, **Birth Date**, **Marriage Date** and **Remarks** pertaining to the contact person.
8. Specify whether the contact person must be set as default or not, in the **Default** field.
9. Click the **Edit Contact Persons** pushbutton, to update the information regarding the contact person.

Entering the default 'ship to' or 'bill to' customer details

Customers may enter into mutual relationships based on certain criteria regarding their operations by which each of them gains an advantage. These relationships would be in the form of executing one of the three areas in processing an order: ordering, shipping or billing.

Bill To Customer: A bill to customer may be a regular banking/commercial agency which picks up their bills, pays upfront on their behalf and when subsequently collecting the same from the order-from customer, charges a processing fee for the service rendered.

Ship To Customer: A ship to customer may be a nodal agency appointed by a group of customers for procurement of goods according to their needs. The vendor can supply the goods to the ship to customer who in turn hands over the goods to the respective customer.

1. Select the **Edit Default Ship/Bill To Customer** link in the **Edit Sales Point Information** page. The **Edit Default Ship/ Bill To Customer** page appears. *See Figure 2.20.*

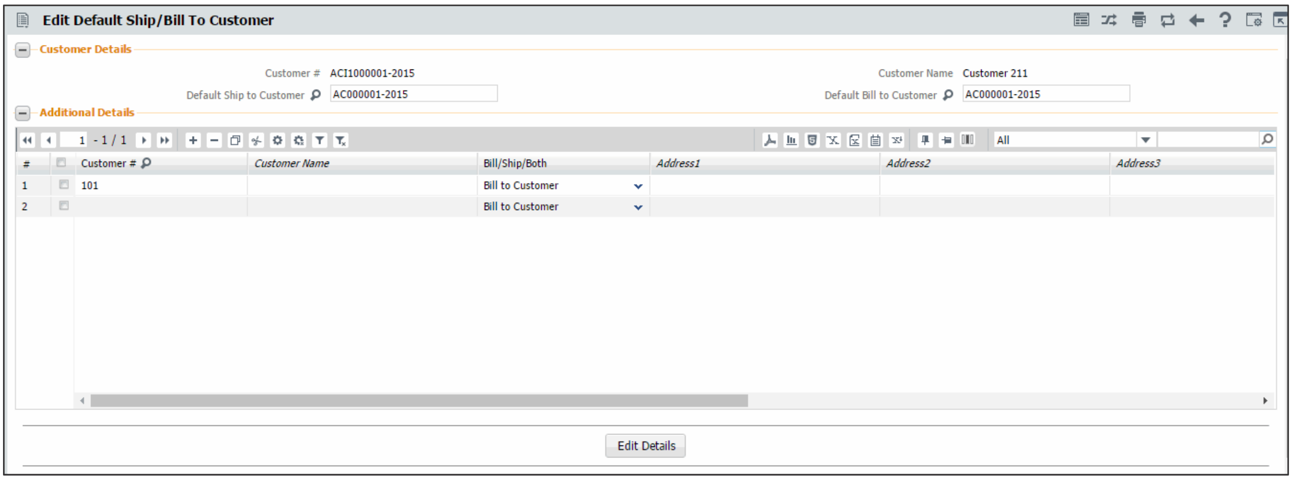


Figure 2.20 Entering default ship to or bill to customer details

2. Enter the code identifying the customer to whom the goods must be shipped by default, in the **Default Ship To Customer** field.

3. Enter the code identifying the customer to whom the goods must be billed by default, in the **Default Bill To Customer** field.

In the **Additional Details** multiline,

4. Enter the code identifying the customer to whom the goods can be shipped and/or billed, in the **Customer #** field.

5. Specify whether the goods can be shipped and/or billed to the customer, by selecting the relevant option in the **Bill/ Ship/Both** drop-down list box.

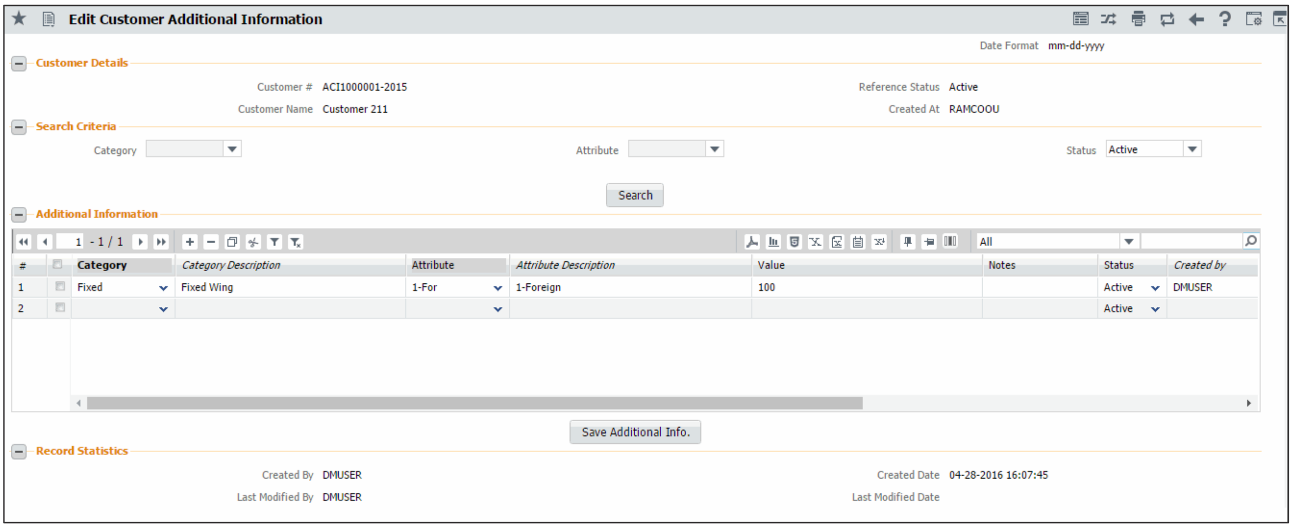
6. Click the **Edit Details** pushbutton to update the default bill to/ship to customer details.

2.9 MAINTAINING ADDITIONAL INFORMATION OF CUSTOMER

The Edit Customer Additional Information page helps to maintain customer details over and above the customer main information. In this page, you can define complex and multi-layered data for a customer. For example, varied sales channels adopted by the customer for promotion, various channels through which the customer can interact with many government agencies.

To achieve this, additional information is classified into various categories and then multiple attributes are defined for them or they can be classified further. You can specify a value for an attribute or you may just stop at the category or attribute level without specifying a value.

1. Select the **Edit Customer Additional Information** link in the **Create Customer Record or Edit Customer Main**
2. **Information** pages. The "**Edit Customer Additional Information**" page appears. *See Figure 2.21*.



2.21 Editing customer additional information

3. In the **Additional Details** multiline, use the **Category** drop-down list box to select the category of the additional information record,
4. Use the **Attribute** drop-down list box to select the attribute for the category of the additional information record.
5. Enter **Value** for the attribute for the category of the additional information record.
6. Use **Status** the drop-down list box to select the status of the Additional details record. The drop-down list box displays: Active and Inactive.
7. Click the **Save Additional Info** pushbutton.

MASTER DEFINITIONS FOR SALES SETUP

The Sales Setup sub process facilitates managing the sale of goods and services by setting up basic entities such as category, payment terms, taxes/charges/discounts, delivery area and goods transport carrier.

Category business component facilitates the creation of category types, which are user-defined values applicable for a category, based on certain characteristics. You to create, modify, activate / inactivate or view category types for a selected category. You can add various category types within a predefined category

Pay Term business component defines the terms of payment that are applicable to any transaction. The various pay terms defined in this business component are utilized by other business components such as Supplier, Purchase Order, Return Slip and Blanket Purchase Order.

3.1 DEFINING CATEGORY MASTER

Category types are user-defined values applicable for a category, based on certain characteristics. For example, for the category “Invoice Category” you can define the category types “Preliminary”, “Initial Invoice”, “Redelivery”, “Final” and so on to indicate the types of invoices used by the organization. The categories are predefined in the system. The system allows you to define your own category types under a predefined category. The status of the newly-defined category type is set to “Active”. You can also specify the category type(s) to be set as default.

In this page you can create, modify, activate / inactivate or view category types for a selected category. You can add various category types within a predefined category

This activity also allows you to view the details of the selected category. Based on the category and the status selected, the category type, status and description can be viewed.

3.1.1 MAINTAINING CATEGORY CODES

You can create many category types within a predefined category. You can enter a unique code and description for the category type. You can also set the category type as a default value for the category. The status of the newly-created category type is set as “Active”. You have the option to make modifications to the description of a quick code. You have the option to make a category inactive by assigning that status to it in the multiline.

1. Select the **Maintain Category Codes** link in the **Category** business component. The **Maintain Category Codes** page appears. *See Figure 3.1.*

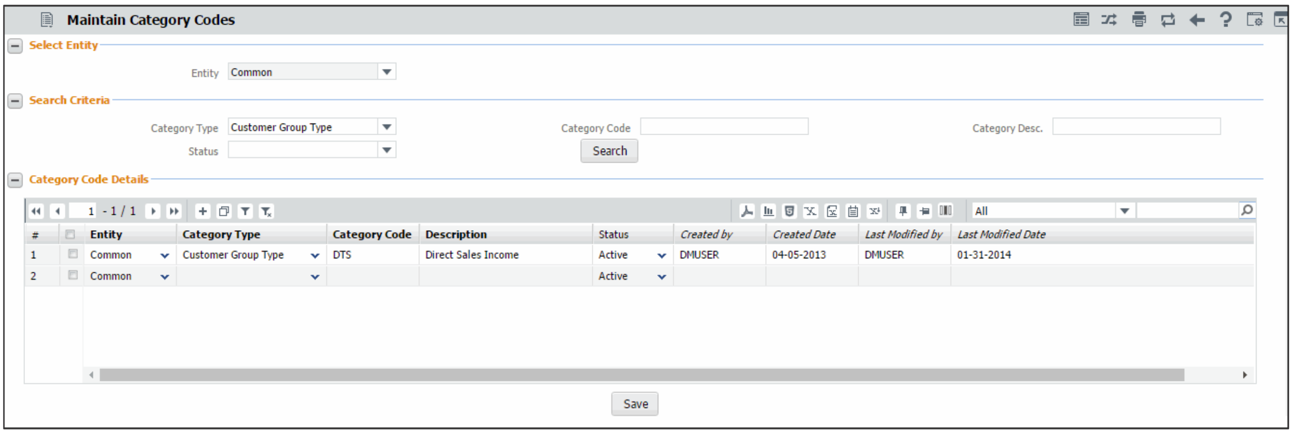


Figure 3.1 Creating category types

2. Use the **Entity** drop-down list box to specify the grouping of the category code.
3. Enter details in the Search Criteria group box and click the **Search** pushbutton.

In the **Category Code** Details multiline:

4. Select the grouping to which the category code you wish to create / modify belongs from the **Entity** drop-down list box.
5. Enter the **Category Type** and the Category Code and provide the **Description** of the category type.
6. Click the **Save** pushbutton to create or modify the category details.

   Note: The system sets the status of the category type as “Active”.

3.2 DEFINING CUSTOMER PAYMENT TERMS

Pay term is a code that represents the terms of payment, the details of which are applied to the transaction wherever it is used. Each payment term can be identified as consisting of various payment stages with different payment schedules.

Refer to **Chapter 2/ Procurement Management Setup** in Procurement Management User Guide, for further details on defining customer pay terms.

3.3 IDENTIFYING DELIVERY AREA

You can identify various delivery areas referring to the location where the goods can be delivered to a customer. The delivery area can be a country, state, city or an area within a city. A delivery area can be a parent delivery area or a child delivery area.

A delivery area becomes a parent delivery area when child delivery areas are assigned to it. The parent delivery area can consist of more than one child delivery area. The system assigns level numbers to all the delivery areas in the hierarchy. The system updates the level as ‘1’ for the parent delivery area and increments the level number by ‘1’ for all the child delivery areas created under it.

You can also activate or deactivate the delivery areas at any time.

Refer to **Chapter 2/ Procurement Management Setup** in Procurement Management User Guide, for further details on defining customer pay terms.

SALES TAX RULES SETUP

Sales Tax Rules is a master, which enables you to describe company level taxes at various levels such as customer group level, station level and warehouse level. Parameters can be set in this activity based on which service taxes will be levied on the different commercial documents like sales quotations, initiate invoices, customer orders and so on.

4.1 DEFINING TAX, CHARGE AND DISCOUNTS

Taxes, Charges and Discounts (TCD) refer to various additional charges to be added or subtracted from the account payable to the vendor. TCD depends on the terms and conditions of the contract between the supplier and the customer and on government policies.

Refer to **Chapter 2/ Procurement Management Setup** in Procurement Management User Guide for further details on defining taxes, charges and discounts.

4.2 MANAGING SALES TAX RULES

1. Select **Manage Sales Tax Rules** under the **Sales Tax Rules** business component. The **Manage Sales Tax Rules** page appears. *See Figure 4.1.*

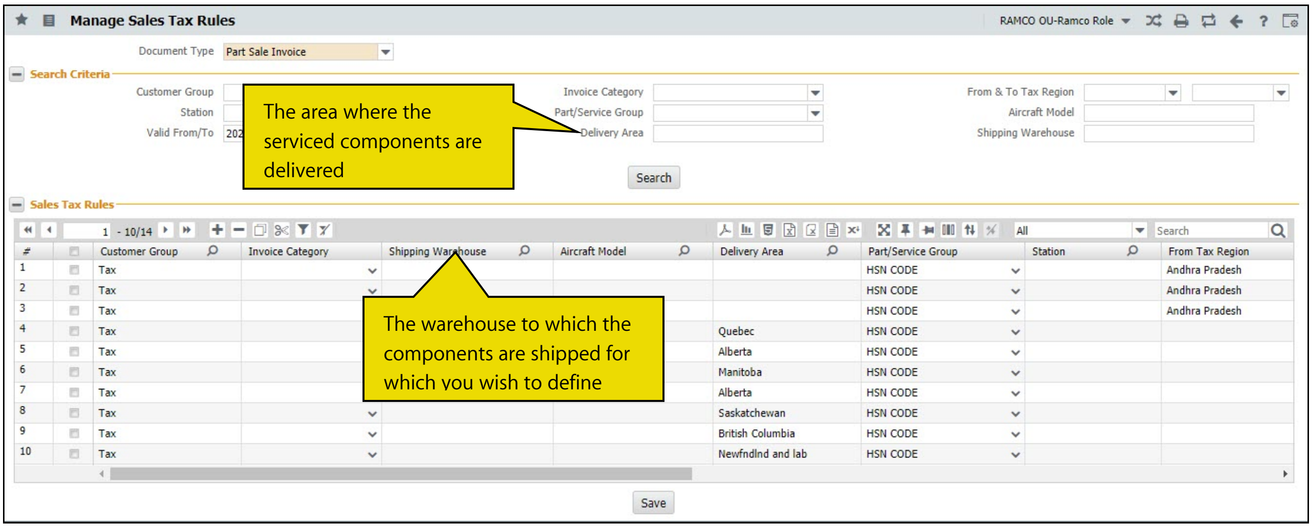


Figure 4.1 Managing Sales Tax Rules

2. Use the drop-down list box to indicate the **Document Type** for which tax defined is applicable.

In the **Search Criteria** group box,

> *Note: For a tax code, ensure that atleast one of the following fields are specified: Customer Group, Shipping Warehouse, Delivery Area or Station.*

3. Enter the **Customer Group**, Invoice Category, and other details and provide the tax region that is mapped to the station of the primary work center in the From and To Region fields.
4. Click the **Search** pushbutton to retrieve the search results in the multiline.
5. Enter the **Tax Code**, **Variant Code** and **Description**, **Applied On**, **Effective From** and other details in the multiline.
6. Click the **Save** pushbutton to save the details entered or modified.

> *Note: The values for "Applied On' such Fixed – Std. Rate, Usage Per Hour and Others – No. of Pax are allowed to define the Sales Tax Rules only against 'Customer Misc. Invoice – Flight Contract based' document types. The system will not allow these values for any other document types.*

PART PRICING SETUP

The profitability of an organization directly depends on the pricing policies of its goods and services offering Rationalized and uniform price structures increase order-processing efficiency and reduces the risk of acceptance of orders at non-viable prices. However, market dynamics may demand that organizations evolve customer-specific prices to remain competitive.

Sale of goods may involve incurring of expenses by way of taxes and charges for transportation, insurance etc., over and above the base price, which will be recovered from the customer.

Part Pricing Setup sub process helps in establishing part pricelist and configuring rules for identifying the applicable taxes and charges for goods sold.

Part Pricelist business component facilitates the creation of part pricelist.

Pricing Settings business component enables you to set optional parameters for defining taxes and charges rules in the “Sales Charge & Tax Rule” business component.

5.1 PREPARING PART PRICELIST

Organizations record and maintain the prices of all the parts as 'pricelists'. An organization may maintain multiple pricelists for the same set of parts as the prices may differ depending on various conditions in different transactions. In such cases, the appropriate pricelist that satisfies the condition is chosen while recording the transaction.

5.1.1 SETTING OPTIONS FOR PART PRICELIST

You can set the default options for the part pricelist.

1. Select **Set Options** under **Part Pricelist** business component. The **Set Options** page appears. *See Figure 5.1*.

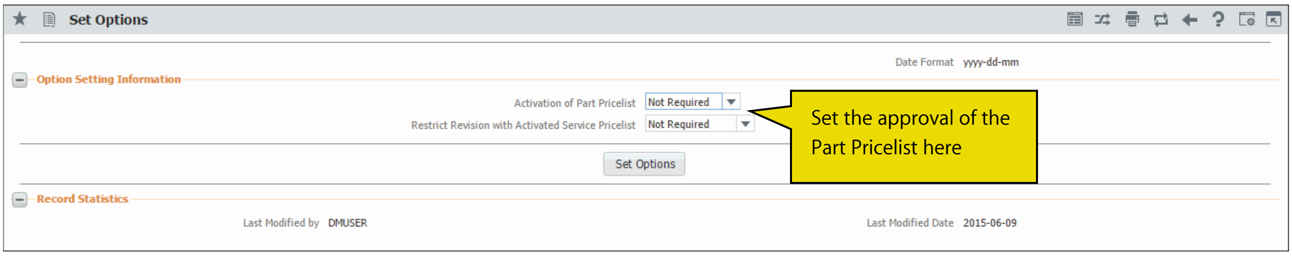


Figure 5.1 Setting options for part pricelist

2. Set **Activation of Part Pricelist** as one of the following:
   - Required - Select this option if the activation of the part pricelist is required.
   - Not Required – Select this option if the activation of the part pricelist is not required.
   - Required only for Revisions - Select this option if the activation is required only for revising a part pricelist.
3. Select either "Required" or **"**Not Required" in the **Restrict Revision with Activated Service Pricelist** drop-down list box.
4. Click the **Set Options** pushbutton.

5.1.2 CREATING PART PRICELIST

1. Select **Create Part Pricelist** under **Part Pricelist** business component. The **Manage Part Pricelist** page appears. *See Figure 5.2*.

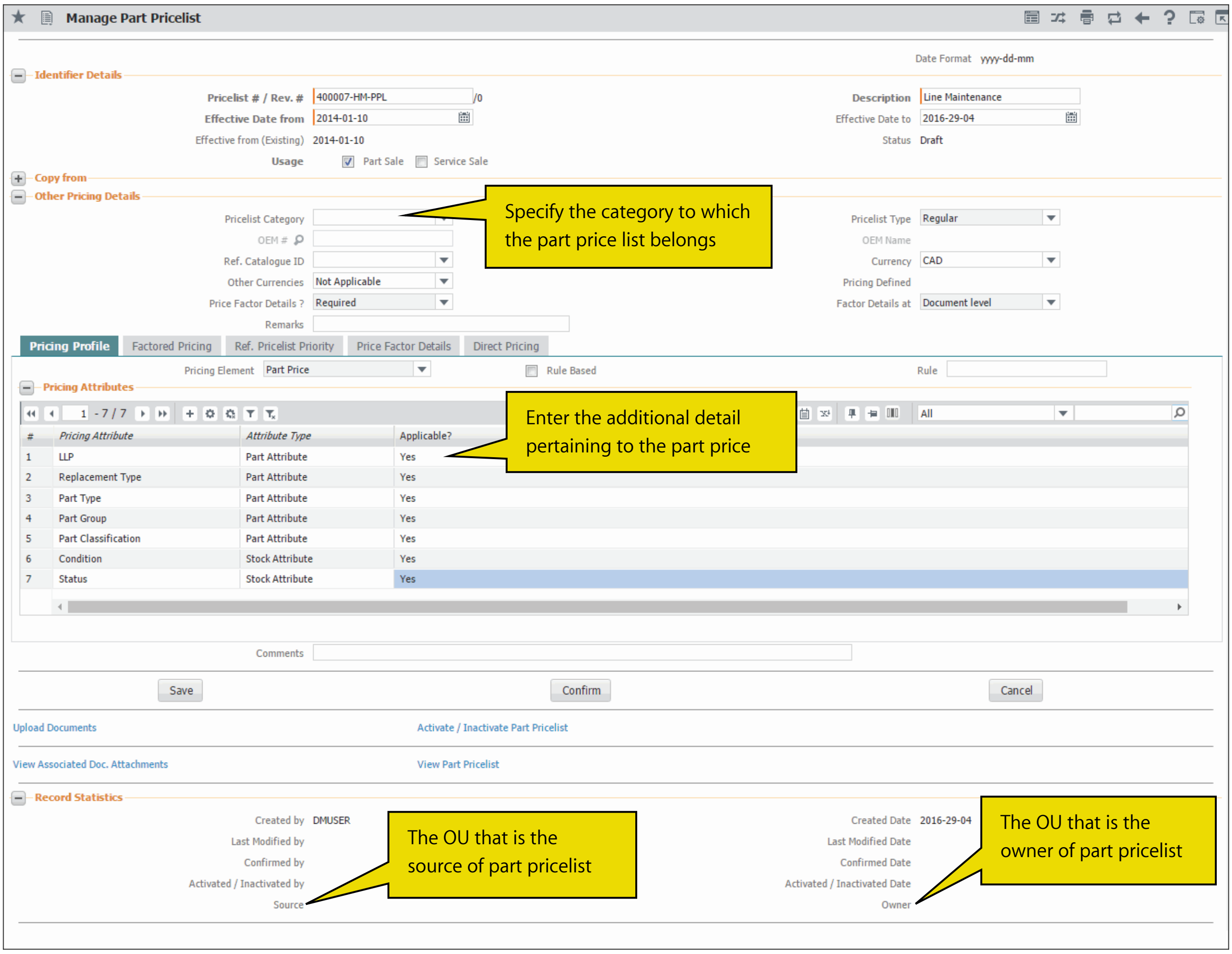


Figure 5.2 Creating a part pricelist

In the **Identifier Details** group box,

2. Enter the unique number to identify the part pricelist, in the **Part Pricelist # / Rev #** field.
3. Enter the **Description** for the part pricelist.
4. Enter the starting date from which the part pricelist becomes effective, in the **Effective From Date** field and the other details.
5. Check one of the following boxes, to indicate the **Usage** of the part pricelist.
   - **Part Sale** – To indicate that the part pricelist is for the sale of a part.
   - **Service Sale** – To indicate that, if an associated part is involved in service sale, the price from the list can be utilized.

In the **Copy From** group box, enter the **Part Pricelist #** from which you wish to copy the details.

Note: This copy option is available only while creating a Part Pricelist002E

6. In the **Copy Options**, check one or more of the following boxes to indicate the details that have to be copied from an existing service pricelist.
   - **Copy All** - Select this option to copy all the details from the service pricelist.
   - **Copy Profile -** Select this option if you wish to copy only the profile details from the reference part pricelist.

In the **Other Pricing Details** group box,

7. Enter the **Pricelist Category** to which the part pricelist belongs and the Currency for the part pricelist.
8. Use the **PriceList Type** drop-down list box to specify the type to which the part pricelist belongs. The system lists

the following options:

- **Regular** – Select this option to indicate whether the pricelist is part number-based, part group-based or part type- based or flat value-based.
- **OEM** – Select this option to indicate that the pricelist is only part number-based.
- **Ref. Catalogue** - Select this option to indicate that the pricelist is based on the reference catalogue ID pricelist eg. Internal pricelist or pricelist after a survey of the market.

  Note: The system displays "Regular" by default.

9. Select **Ref. Catalogue ID** and the **Currency** of the part pricelist.
10. Specify whether transaction in other currencies is "Applicable" or "Not Applicable" for the part pricelist, in the **Other Currencies** field.
11. Select whether price factor details are required in the **Price Factor Details?** field.
12. Use the **Factor Details at** drop-down list box to specify at what level the price factor details are applicable, whether at Document Level or Line Level.
13. Select the **Pricing Profile** tab to select attributes for each pricing element based on which factored pricing is defined.
14. Select the **Factored Pricing** tab to define the price factor at each pricing element level.
15. Select the **Ref. Pricelist Priority** tab to define priority for alternate pricelist.
16. Select the **Max Price – Appl. Pricelists** tab to capture Ref. Catalogue IDs and its Price Factors.

    *Note: This tab appears only if the 'Factored on' is set as "Price List with Max Price" in the **Factored Pricing** tab.*

17. Select the **Direct Pricing** tab to define prices directly.
18. Select the **Price Factor Details** tab to define factor pricing breakups.
19. Click the **Save** pushbutton to save the part pricelist.
20. Click the **Confirm** pushbutton, to confirm the part pricelist.

    Note: You can confirm the part pricelist only if it is in the "Fresh" status.

    The system updates the status of the service pricelist as "Confirmed" if for a particular Part pricelist # / Revision # the "Activation of Part Pricelist" field is set at "Required" in the "Set Options" activity of the current business component.

    The system updates the status as "Active", if the "Activation of Part Pricelist" is set as "Not Required "or "Required only for Revisions" in the "Set Options" activity.

21. Click the **Cancel** pushbutton, to cancel the part pricelist.

To provide further details,

- Select the **Upload Documents** link at the bottom of the page to upload documents.
- Select the **Activate / Inactivate Part Pricelist** link at the bottom of the page to activate or inactivate the selected part pricelist.
- Select the **View Associated Doc. Attachments** link at the bottom of the page to view information regarding the associated document attachments.
- Select the **View Part Pricelist link** at the bottom of the page to view details of the part pricelist.

Defining Pricing Profile

1. Select the **Pricing Profile** tab in the **Manage Part Pricelist** page. *See Figure 5.3*.

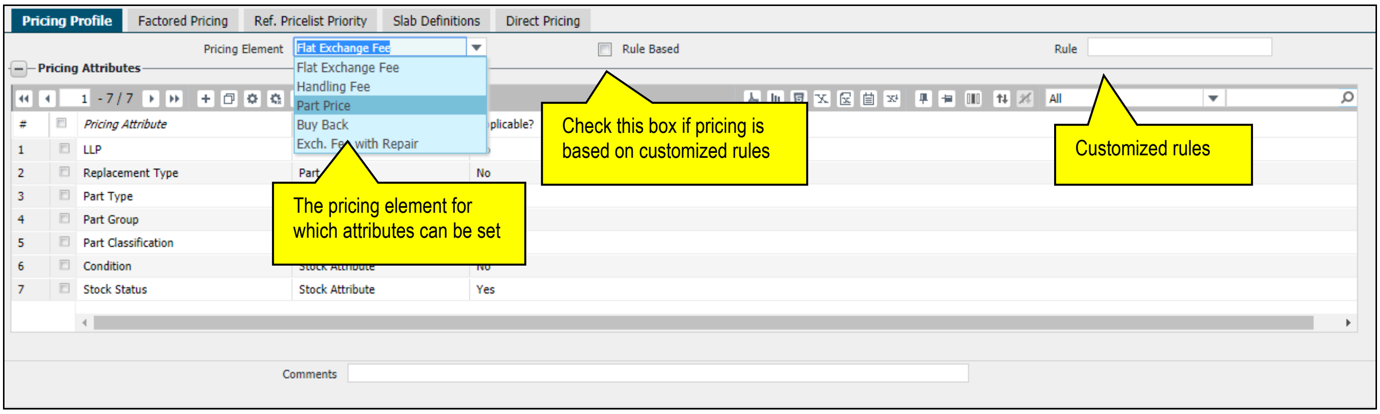


Figure 5.3 Defining pricing profile

Note: Price must be defined for at least one "Part #" if "OEM" or "Ref. Catalogue ID" is selected as the "Pricelist Type" in the "Other Pricing Details" group box in the "Manage Part PriceList" page.

2. Select the **Pricing Element** for which attribute is to be defined.

3. Check the **Rule Based** check box if the pricing for a given part pricelist is based on the customized rules. If this checkbox is checked, enter the **Rules** based on which pricing is calculated.

4. Select **Yes** or **No** in the **Applicable?** field to indicate if an attribute is applicable for the pricing element.

Defining factor at pricing element level

1. Select the **Factored Pricing** tab page in the **Manage Part Pricelist** page. *See Figure 5.4.*

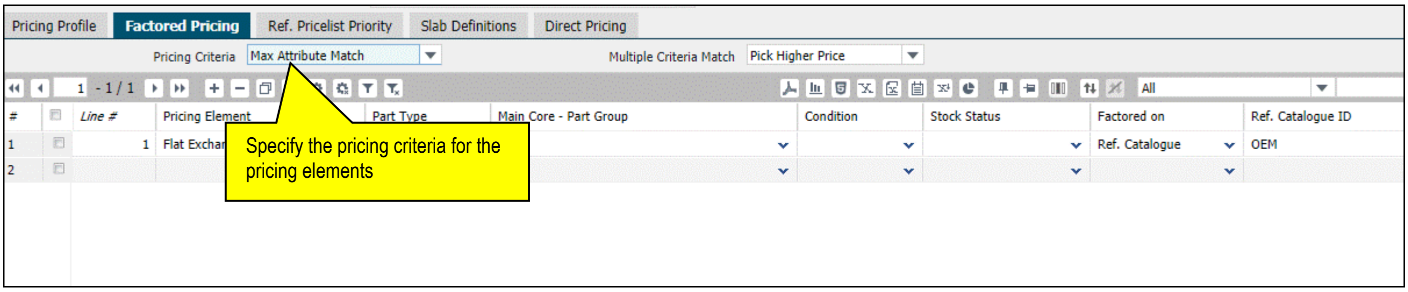


Figure 5.4 Defining factor at pricing element level

Note: Date entry in this tab is not required if rules are defined in the "Pricing Profile" tab.

2. Select the **Pricing Criteria** for the pricing elements for which more than one combination of pricing is defined in the factored pricing element.

3. Select the **Multiple Criteria Match** to specify the price to be considered when there are multiple pricing combinations with different prices.

4. Select the **Pricing Element**, **LLP**?, **Replacement Type**, **Part Type**, **Part Group**, **Main Core Part Group** and other fields in the multiline.

5. Use the **Factored On** drop-down list box and select the reference price list type as 'Ref. Catalogue', 'OEM Pricelist', 'Part Level Pricing Basis' or 'Pricelist with Max Price'.

6. Use the **Slab Definition For?** drop down list box to indicate whether slab is required for Base Adjustment Factor, Price Factor or both.

7. Select the **Multiple Price Factor? as** "Yes" if you wish to define different price factors for different pricelists in 'Max. Price – Appl. Pricelists' tab. Else select "No".

Defining reference pricelist priority

1. Select the **Ref. Pricelist Priority** tab page in the **Manage Part Pricelist** page. *See Figure 5.5.*

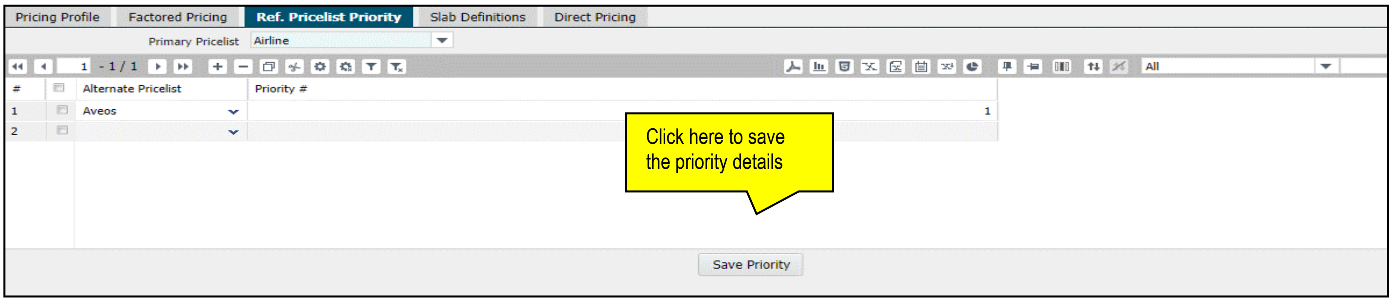


Figure 5.5 Defining reference pricelist priority

Note: Pricelist must be saved in order to define reference pricelist priority and more than one Primary Pricelist and Alternate Pricelist must be available to define a priority.

2. Select the **Primary Pricelist** to specify the primary pricelist.
3. Select the **Alternate Pricelist** and enter the number identifying the priority in the **Priority #** field in the multiline.
4. Click the **Save Priority** pushbutton to save the priority details.

Defining multiple price list

This tab page allows the user to define multiple pricelist at a line level. If 'Factored On' is selected as 'Pricelist with Max Price' for a line in the **Factored Pricing tab**, then the user can define more than one Reference Catalogue (or) OEM pricelist for that pricing line in 'Max Price – Appl. Pricelist' page.

Note: This tab appears only if the 'Factored on' is set as "Price List with Max Price" in the "Factored Pricing" tab.

1. Select the **Max Price – Appl. Pricelists** tab to capture Ref. Catalogue IDs and its Price Factors. *See Figure 5.6.*

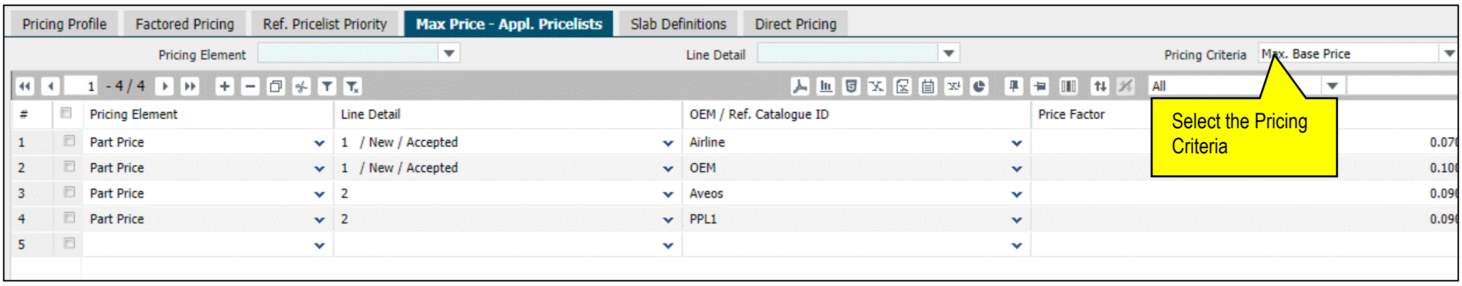


Figure 5.6 Defining multiple price list

2. Select the **Pricing Criteria** as 'Max Base Price' or 'Max Price including Markup' above the multiline.
3. Specify the Pricing Element, Line Detail and OEM / Ref. Catalogue ID in the multiline.

Defining slab rates

This tab enables you to view the details of the slab definition provided for the respective pricelist.

1. Select the **Slab Definition** tab to capture Ref. Catalogue IDs and its Price Factors. *See Figure 5.6.*

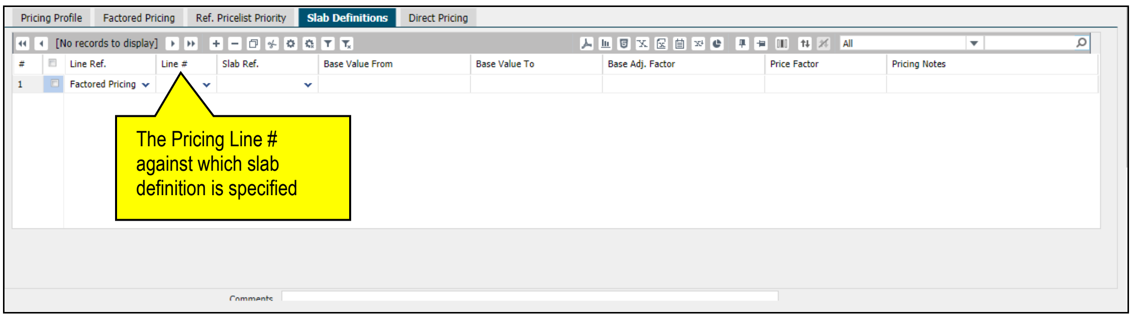


Figure 5.7 Defining slab rate

2. Enter details like **Slab Ref.**, to indicate whether slab definition is provided for Price Factor or Base Adj. Factor.

3. Specify the **Base Adj. Factor** Indicating the adjustment factor to be applied on the reference rate of the part.

4. Enter the markup factor to be applied on the rate of the part if the respective slab definition is qualified forpricing in the **Price Factor** column and provide all other details.

Defining pricing directly

1. Select the **Direct Pricing** tab page in the **Manage Part Pricelist** page. *See Figure 5.7.*

   Note: Date entry in this tab is not required if rules are defined in the "Pricing Profile" tab.

   Price must be defined for at least one part number if the pricelist is of type "OEM".

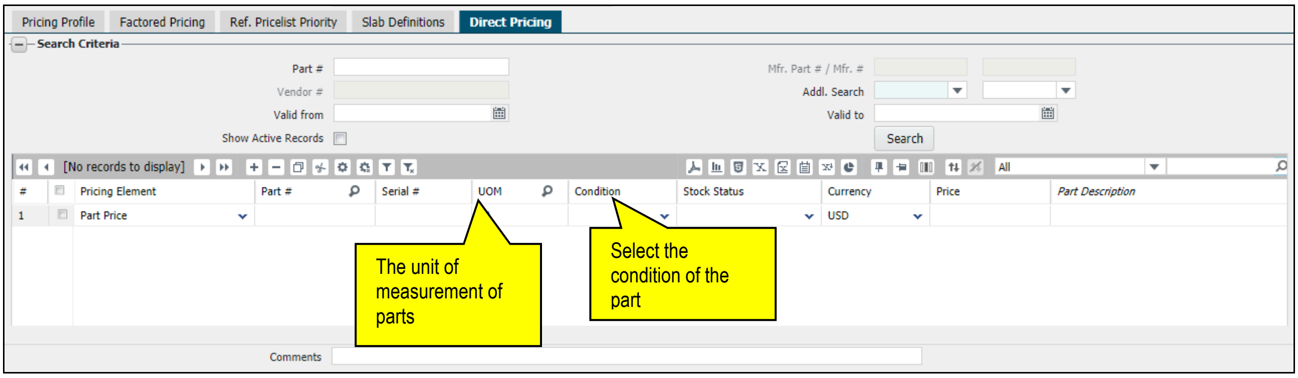


Figure 5.7 Defining pricing directly

2. In the **Search Criteria** group box enter details of part for which you wish to define pricing and click the **Search** pushbutton to retrieve search details in the multiline.

3. Select the **Pricing Element** for which the price is to be defined.

4. Enter the **Vendor #**, **Part #**, **Mfr. Part #**, **Manufacturer #** and other details in the multiline.

5. Click the **Get Part Details** pushbutton to retrieve part details.

Defining price factor breakups

1. Select the **Price Factor Details** tab page in the **Manage Part Pricelist** page. *See Figure 5.8.*

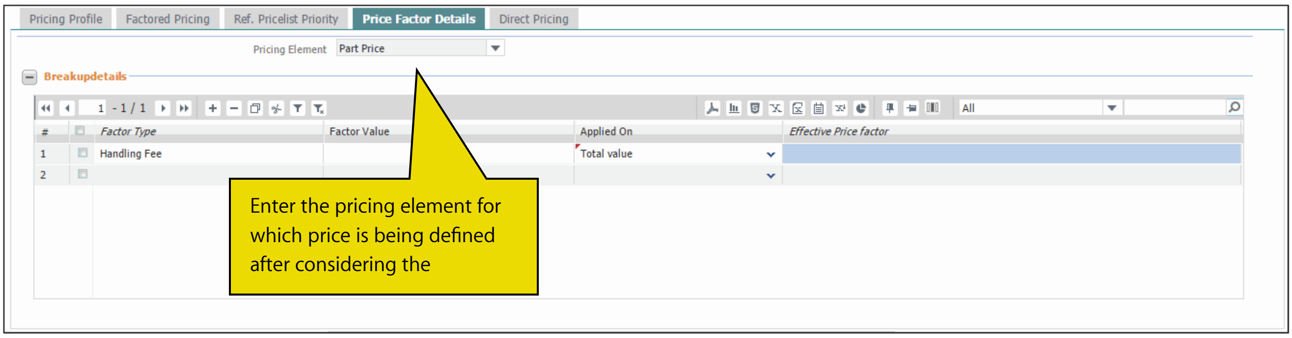


Figure 5.8 Price Factor Details

Note: The process parameter "Definition of Price factor details in Part Pricelist" for the parameter "Part Pricelist" in the "Set Sales Process Parameters" activity of the "Customer" business component must be set as either "Required" or "Specific Pricelist".

2. Specify the **Pricing Element** for which price is being defined after considering the attributes assigned in the pricing profile.

3. Select the price factor at line level based on the Pricing Element selected in the **Line Detail** drop-down list box.

4. In the **Breakup Details** multiline, enter the value of the price factor in terms of percentage in the **Factor Value** column and select the basis on which price factor is applied in the **Applied On** drop-down list box.

5.2 ACTIVATING OR INACTIVATING PART PRICELIST

On confirmation, the part pricelist becomes "Active", if the option "Activation of Part Pricelist" is set as "Not Required" in the "Set Options" activity.

5.2.1 ACTIVATING OR INACTIVATING PART PRICELIST

1. Select **Activate / Inactivate Part Pricelist** under **Part Pricelist** business component. The **Activate / Inactivate Pricelist** page appears. *See Figure 5.9*.
2. Enter **Search Criteria** to search for the part pricelist and click the **Search** pushbutton.
3. Enter the **Comments** regarding activating, inactivating or returning the part pricelist.
4. Click the **Inactivate Part Pricelist** pushbutton, to inactivate the selected part pricelist.

   Note: The system updates the status of the part pricelist as "Inactivate".
5. Click the **Return Part Pricelist** pushbutton, to return the selected part pricelist.

   Note: Only part pricelists that are in "Confirmed" status can be returned for further modifications.
6. The system updates the status of the part pricelist as "Returned".

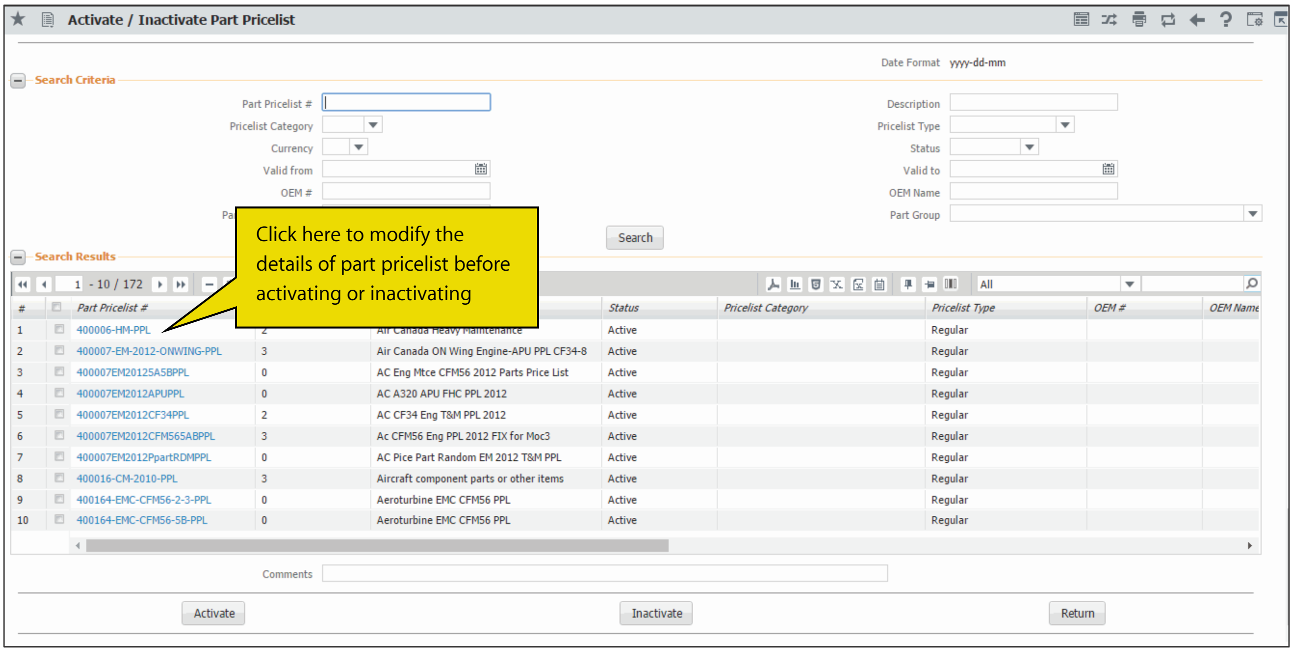


Figure 5.9 Activating or Inactivating part pricelist

7. Click the **Activate Part Pricelist** pushbutton, to activate the selected part pricelist.

   Note: The system updates the status of the part pricelist as "Activate".

5.3 MODIFYING / REVISING PART PRICELIST

Revision of part pricelist occurs after the details of the part pricelist have been 'Activated'. A part pricelist that is in "active" status can be revised.

1. Select **Edit** / **Revise Part Pricelist** under **Part Pricelist** business component. The **Select Part Pricelist** page appears. *See Figure 5.10*.

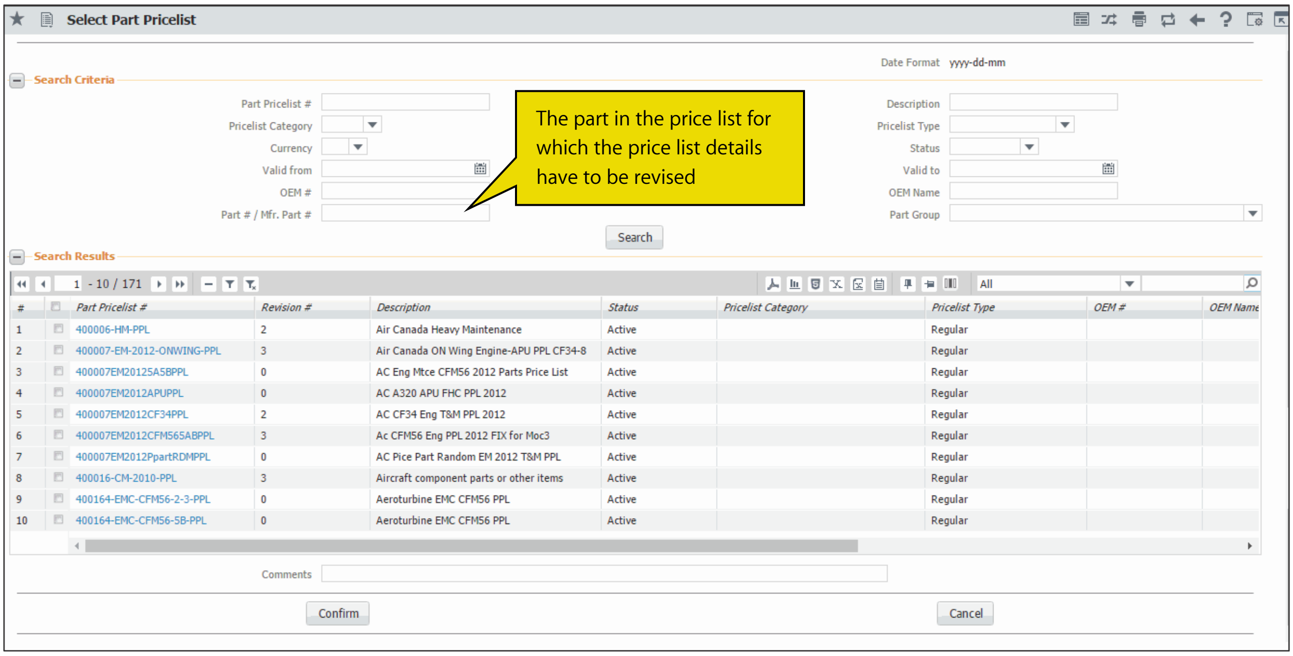


Figure 5.10 Modifying / Revising part pricelist

2. Enter **Search Criteria** to search for the part pricelist to be confirmed or cancelled and click the **Search** pushbutton.

3. Enter the comments regarding confirming or canceling the part pricelist, in the **Comments** field.

4. Click the **Cancel** pushbutton to cancel the selected part pricelists.

   Note: The system updates the status of part pricelist as "Canceled".

5. Click the **Confirm** pushbutton to confirm the selected part pricelists.

   Note: The system updates the status of part pricelist as "Confirmed".

   The system updates the status as "Active", if the "Activation of Part Pricelist" is set as "Required" in the "Set Options" activity.

6. Select the hyperlinked part pricelist number in the multiline to go to the **Manage Part Pricelist** page.

7. The **Manage Part Pricelist** page appears. *See Figure 5.11*.

8. The system retrieves the details that are already recorded for the part pricelist.

9. Enter the **Description** for the part pricelist.

10. Enter starting date from which the part pricelist becomes effective, in the **Effective Date From** field.

11. Enter the date till which the part pricelist remains effective, in the **Effective Date To** field.

    Note: Ensure that the "Effective Date From" and "Effective Date To" is unique for the part pricelist number- revision number combination.

12. Check one of the following boxes, to indicate the **Usage** of the part pricelist.
    - **Part Sale** – To indicate that the part pricelist is for the sale of a part.
    - **Service Sale** – To indicate that, if the associated part is involved in service sale, the price from the list can be utilized.

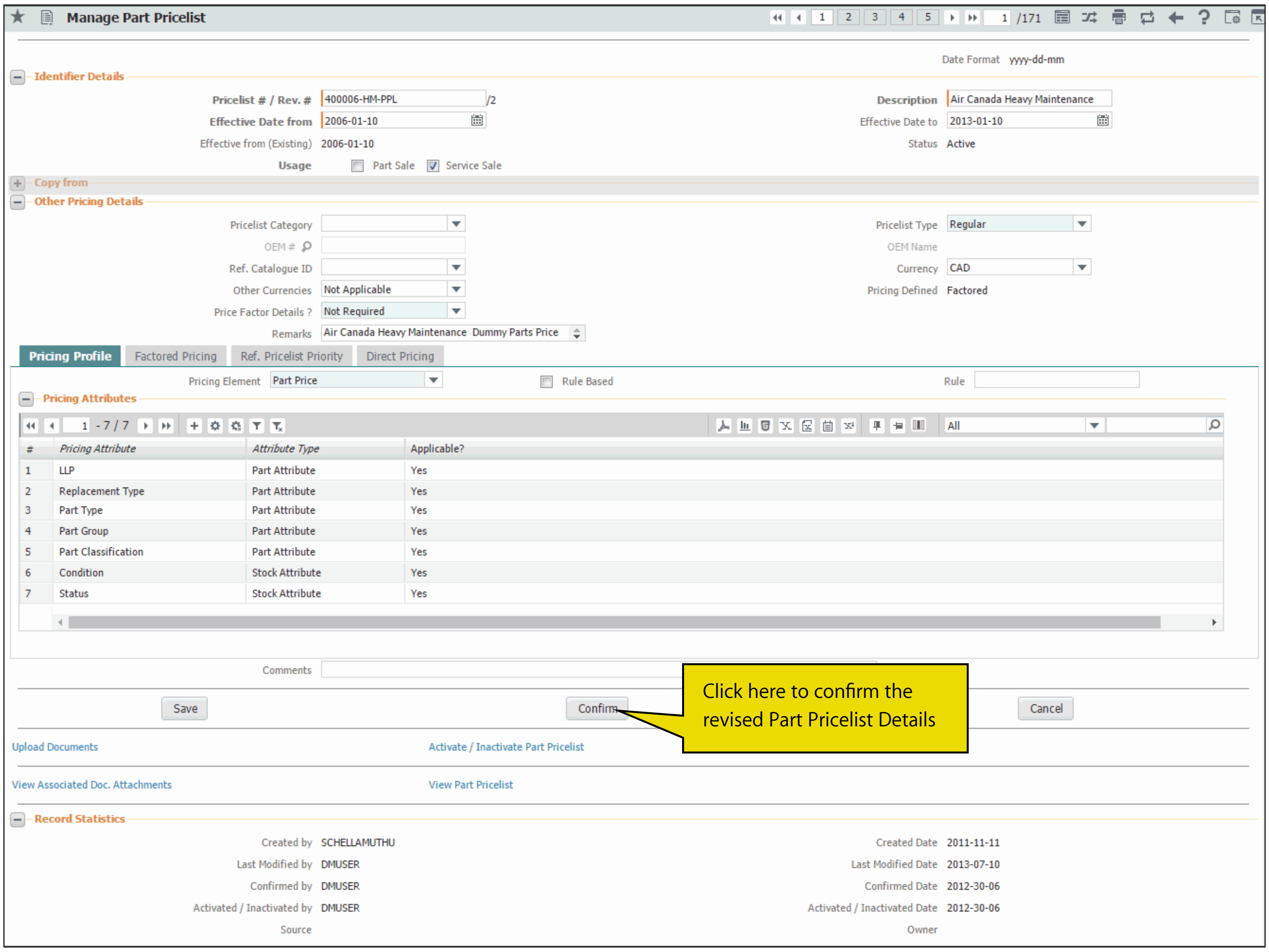


Figure 5.11 Revising a pricelist

13. Select any one of the following to set the **Pricing Method** for the part pricelist:
14. Click the **Save** pushbutton, to update the revised part pricelist details.

    Note: The system updates the status of the part pricelist as “Fresh”.

15. Click the **Confirm** pushbutton, to confirm the revised part pricelist details.

    Note: The system updates the status as “Active” and generates the revision number, if the “Activation of Part Pricelist“ is set as “Not Required” in the “Set Options” activity.

SERVICE PRICING SETUP

The profitability of an organization directly depends on the pricing policies of its goods and services offering. Rationalized and uniform price structures increase the order-processing efficiency and reduce the risk of acceptance of orders at non-viable prices. However, market dynamics may demand that organizations evolve customer-specific prices to remain competitive.

Sale of services may involve incurring of expenses by way of taxes and charges for transportation, insurance etc. over and above the base price, which will be recovered from the customer.

Service Pricing Setup sub process eases service pricelist definition and rules configuration for identifying the applicable taxes and charges for the services rendered.

Service Pricelist business component facilitates the creation of a service pricelist.

6.1 PREPARING PRICELIST FOR SERVICE SALES

An organization may maintain multiple pricelists for the same set of services, as the prices may differ depending on various business scenarios in the different transactions. In such cases, the appropriate pricelist that satisfies the conditions is chosen while recording the transaction.

6.1.1 SETTING OPTIONS FOR SERVICE PRICELIST

You can set the default options for the service pricelist.

1. Select **Set Options** under **Service Pricelist** business component. The **Set Options** page appears. *See Figure 6.1.*

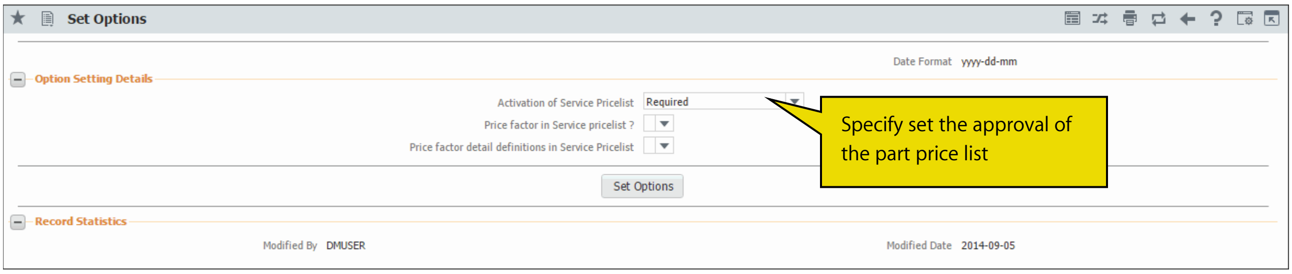


Figure 6.1 Setting options

2. Set **Activation of Service Pricelist** as one of the following:
   - Required - Select this option if a confirmation is required for activating the service pricelist.
   - Not Required – Select this option if a confirmation is not required for activating the service pricelist.
   - Required only for Revisions - Select this option if a confirmation is required only for revising a service pricelist.
3. Click the **Set Options** pushbutton.

6.1.2 CREATING SERVICE PRICELIST

The prices of all the services are recorded in the pricelist. Service pricelists enable planners to ascertain the material price, resource price and therefore are used to estimate the worth of customer orders.

1. Select **Create Service Pricelist** under **Service Pricelist** business component. The **Manage Service Pricelist** page appears. *See Figure 6.2.*

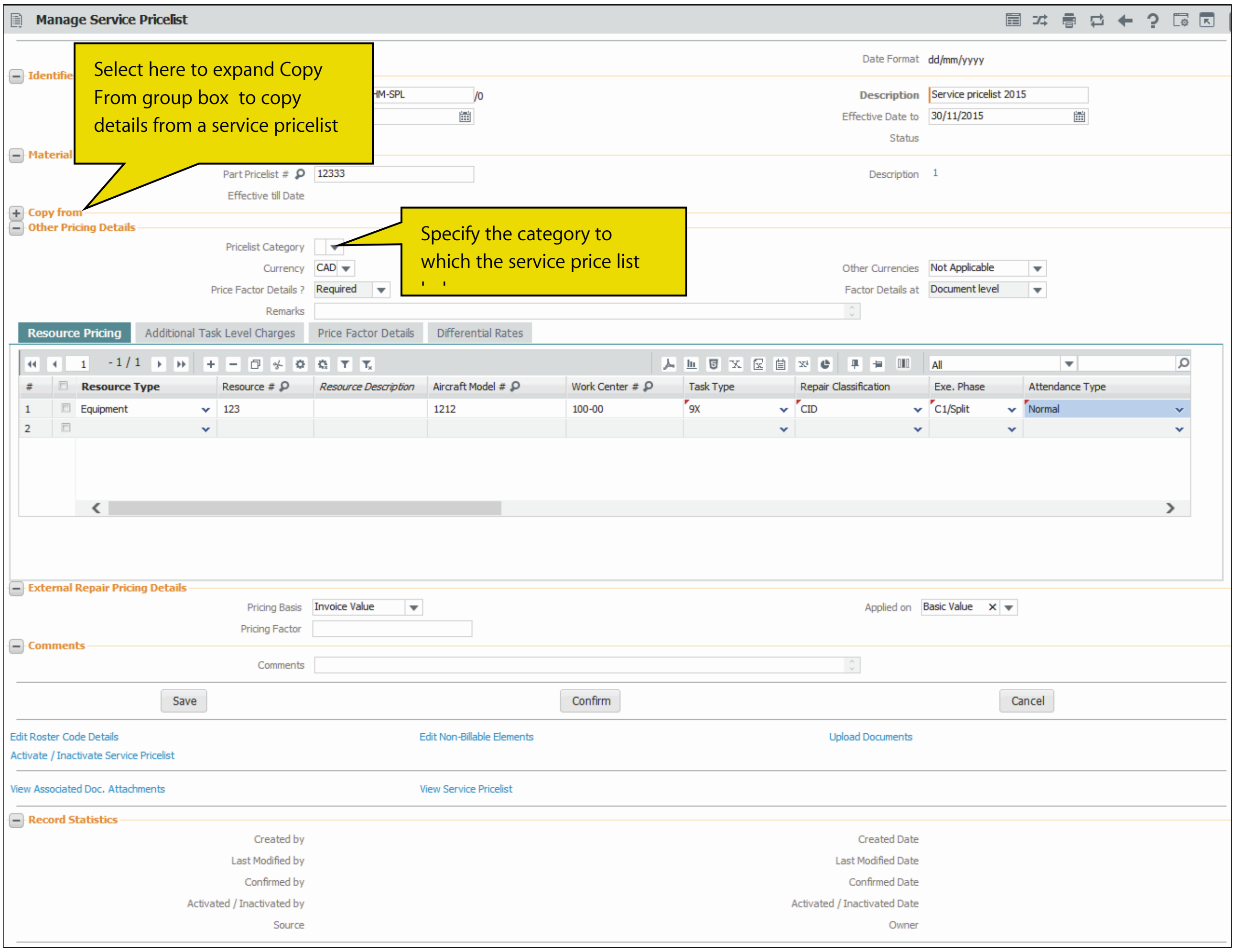


Figure 6.2 Creating a service pricelist

In the **Identifier Details** group box,

2. Enter the unique number to identify the service pricelist, in the **Pricelist # / Rev #** field.
3. Enter the **Description** for the service pricelist.
4. Enter the starting date from which the service pricelist becomes effective, in the **Effective From Date** field.
5. Enter the date till which the service pricelist remains effective, in the **Effective To Date** field.
6. Enter the **Part Pricelist #** In the **Material Pricing Details** group box.
7. In the **Copy From** group box, enter the **Service Pricelist#** from which you wish to copy the details.
8. In the **Copy Options**, check one or more of the following boxes to indicate the details that have to be copied from an existing service pricelist.
    - **All** - Select this option to copy all the details from the service pricelist.
    - **Billable Details** - Select this option to indicate that billable details have to be copied from the service pricelist. The billable details are “Work Unit Pricing” and “Repair Pricing”.
    - **Roster Code Details**: Select this option to indicate that Roster Code details have to be copied from the service pricelist.
    - **Non-Billable Details** - Select this option to indicate that “Non Billable Services” have to be copied from the service pricelist.

In the **Other Pricing Details** group box,

9. Enter the **Pricelist Category** to which the service pricelist belongs and the Currency for the service pricelist.

10. Specify whether transaction in other currencies is “Applicable” or “Not Applicable” for the service pricelist, in the **Other Currencies** field.
11. Select the **Resource Pricing** tab to define prices for resources used in services.
12. Select the **Additional Task Level Charges** tab to define charges at task level.
13. Select the **Price Factor Details** tab page to define factor pricing breakups.

In the **External Repair Pricing Details** group box:

14. Select the **Pricing Basis** to be followed for external repair of parts and enter **Applied On** details.
15. Enter the Pricing Factor for RO, Pricing Factor for Service PO, Pricing Factor for Adhoc PO and Pricing Factor for **Direct Service**, if **Pricing Basis** and **Applied On** are selected.
16. Enter **Comments** in the Comments group box.
17. Click the **Save** pushbutton to save the service pricelist.
18. Click the **Confirm** pushbutton to confirm the selected service pricelists.

    Note: The system updates the status of service pricelist as “Confirmed”. The system updates the status as “Active”, if the “Activation of Service Pricelist” is set as “Not Required” or “Required only for Revisions” in the “Set Options” activity.

19. Click the **Cancel** pushbutton to cancel the selected service pricelists.

    Note: The system updates the status of service pricelist as “Canceled”.

To proceed further,

- Select the **Edit Roster Code Details** link, to modify the roster code records.
- Select the **Edit Non Billable Services** link to record the non billable services for the service pricelist.
- Select the **Upload Documents** link at the bottom of the page to upload documents.
- Select the **Activate/Inactivate Service Pricelist** link at the bottom of the page to activate or inactivate the selected service pricelist.
- Select the **View Associated Doc. Attachments** link at the bottom of the page to view information regarding the associated document attachments.
- Select the **View Service Pricelist** link at the bottom of the page to view the details of the service pricelist.

Managing resource pricing details

The Resource Pricing tab appears by default, on launch of the **Manage Service Pricelist** page. *See Figure 6.3.*

Figure 6.3 Managing resource pricing details

1. Use the **Resource Type** drop down list box to select the type of the resource as ” Skills”, “Equipments”, “Tools”, or “Others” for which the resource details are to be added or modified.
2. Enter the number identifying the resource in the **Resource #** field.
3. Select the **Pricing Method** for resources as:
    - Direct - if you wish to enter the price for the service directly.
    - Work unit Wise Flat - to indicate that the price is set at the work unit level for the resource.

- Roster Code - to indicate the price is based the roster code attached to the service pricelist.

  Note: If the Resource Type is "Tools", "Equipment" or "Others", the Pricing Method must not be "Roster Code". This means that the Pricing Method must be set to "Roster Code" for Resource Type "Skills" only.

4. Enter the rate per hour payable to the resource, in the **Normal Rate / Hr** field.

   Note: This field should not be left blank, when the "Pricing Method" is "Direct" or "Roster Code" and the "Billable" field is set to "Yes".

   Leave this field blank, when the "Pricing Method" is "Direct" or "Roster Code" and the "Billable" field is set to "No".

   Leave this field blank, when the "Pricing Method" is "Work unit Wise Flat".

5. Enter the **Pricing Description** and other details in the multiline.

Additional Task Level Charges

1. Select the **Additional Task Level Charges** tab in the **Manage Service Pricelist** page. *See Figure 6.4.*

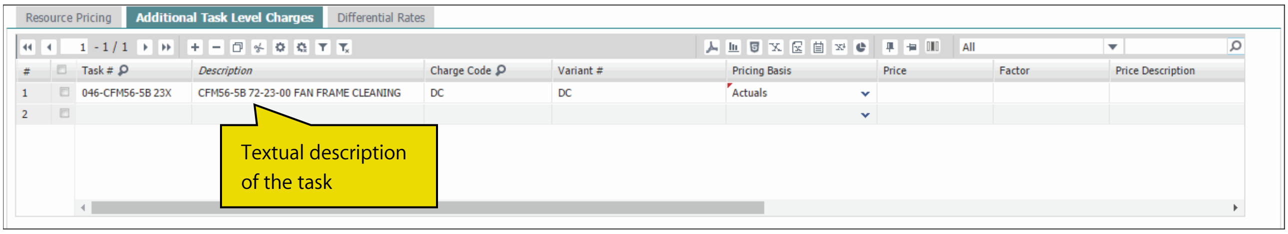


Figure 6.4 Additional task level charges

2. Enter the **Task #** for which you wish to specify charges in the Service Pricelist.
3. Enter also **Charge Code** and the **Variant #.**

   Note: The Charge code – Variant combination must exist in the TCD Master,

4. Use the drop-down list box to select the pricing policy for additional task level charges in the **Pricing Basis** field.
5. Enter the value of the additional task level charge in the **Price** field.
6. Enter the **Factor** charged to the customer which is applied on the actual charge incurred, to arrive at the "Costplus" price.
7. Enter the **Price Description** and **Pricing Notes**.

Defining price factor breakups

1. Select the "**Price Factor Details**" tab in the **Manage Service Pricelist** page.

   Note: As a Prerequisite the process parameter "Definition of Price factor details in Service Pricelist" for the parameter "Service Pricelist" in the "Set Sales Process Parameters" activity of the "Customer" business component must be set as "Required" or "Specific Pricelist".

2. Enter the **Resource Type** for which price factor breakup is to be defined.
3. Enter the percentage value of the price factor in the **Factor Value** field and provide the basis on which price factor is applied in the **Applied On** field.

6.1.3 RECORDING ROSTER CODE DETAILS

You can set differential rates for Normal and Overtime work hours, based on various time slabs. For example, you can set specific Normal and Overtime hourly rate for various time slabs.

1. You must set the Pricing Method for Resource Type "Skill" to "Roster Code" in the "Create Service Pricelist", to enable the system to compute the resource price based on roster code. Differential rates are obtained by applying specific pricing factors on Normal and Overtime hourly rates for predefined durations.Select the **Edit Roster Code Details** link in the **Create Service Pricelist** page. The **Edit Roster Code Details** page appears. *See*

Figure 6.5.

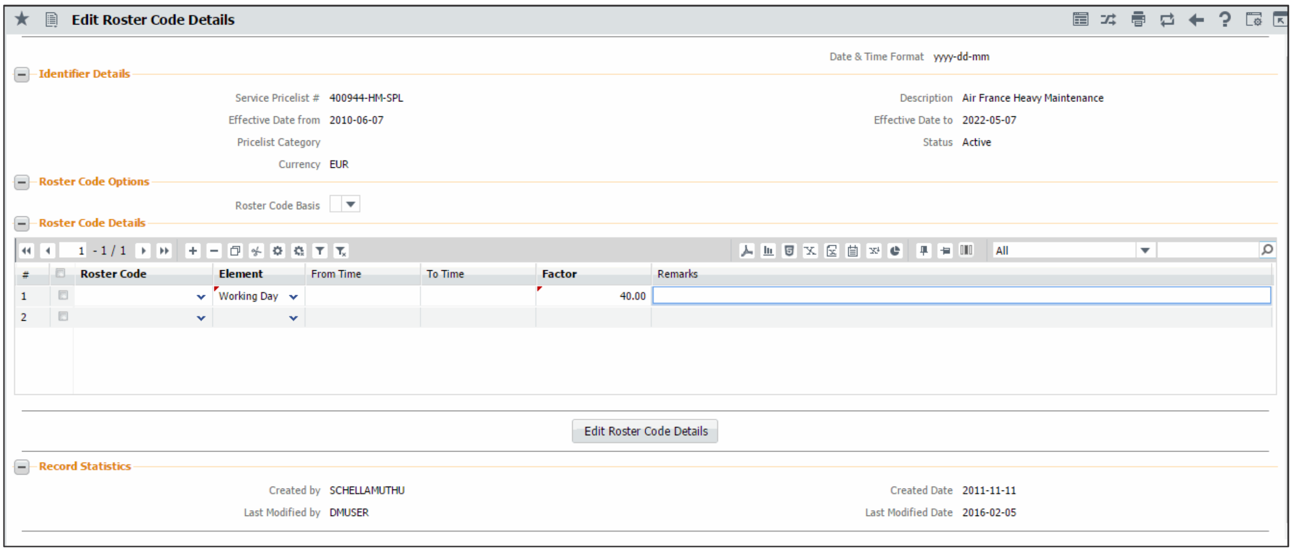


Figure 6.5 Editing Roster Code details

2. In the **Roster Code Options** group box, enter the **Roster Code Basis**.
3. In the **Roster Code Details** multiline, enter the **Roster Code** and the **Element** of roster code.
4. Enter the **From Time** and **To Time**, **Factor** and **Remarks**.
5. Select the **Edit Roster Code Details** pushbutton.

Note: You can also define service price list based on roster code method for other resources like Facilty, Tools and Others and price the resource based on roster code.

6.1.4 RECORDING NON-BILLABLE ELEMENT DETAILS IN THE SERVICE PRICELIST

You can select and specify the work unit type as a non-billable element.

1. Select the **Edit Non-Billable Elements** link in the **Edit Service Pricelist** page. The **Edit Non-Billable Elements** page appears. *See Figure 6.6.*

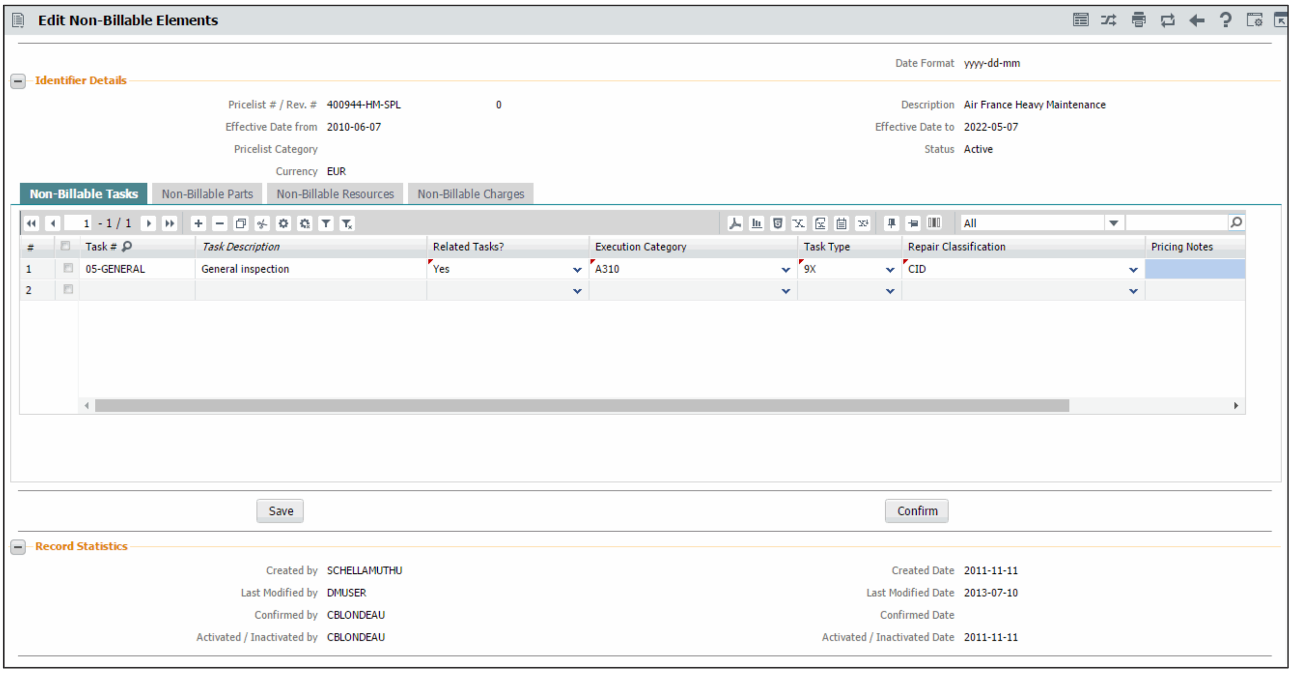


Figure 6.6 Recording non-billable service details

2. Select the [Non-Billable Tasks] tab page to define tasks which are not required to be billed.
3. Select the [Non-Billable Parts] tab page to define parts which are not required to be billed.
4. Select the [Non-Billable Resources] tab to define resources which are not required to be billed.
5. Select the [Non-Billable Charges] tab to define charges that are not required to be billed.
6. Click the **Save** pushbutton to save the non-billable elements defined.
7. Click the **Confirm** pushbutton to confirm the service pricelist.

Note: Service Pricelist which are in confirmed status cannot be modified.

Recording non-billable task details

1. Select the **Non-Billable Tasks** tab in the **Edit Non-Billable Elements** page. *See Figure 6.7.*

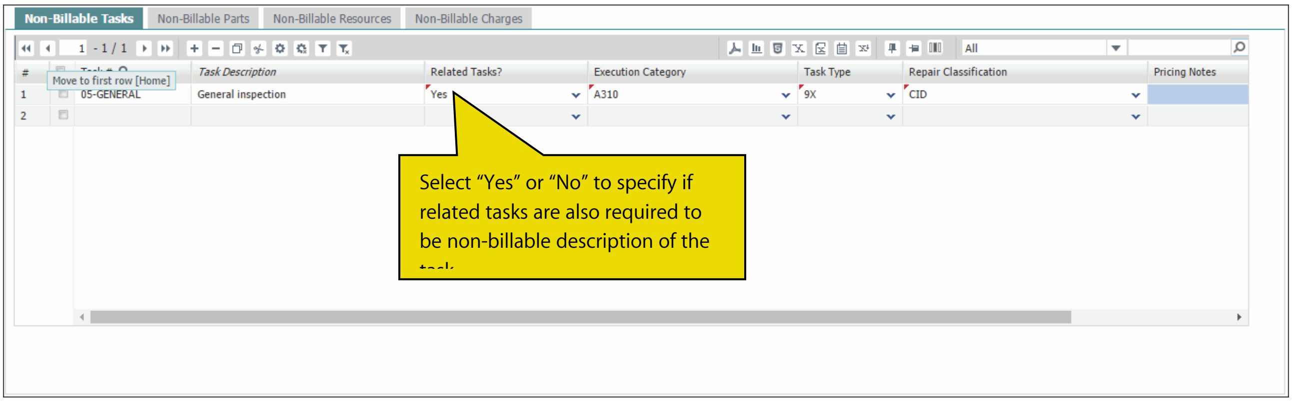


Figure 6.7 Recording non-billable task details

2. Enter the **Task #**, **Execution Category**, **Task Type**, **Repair Classification** and other details in the multiline.
3. Enter a textual description of the pricing combination in the **Pricing Notes** field.

Recording non-billable part details

1. Select the **Non-Billable Parts** tab in the **Edit Non-Billable Elements** page. *See Figure 6.8.*

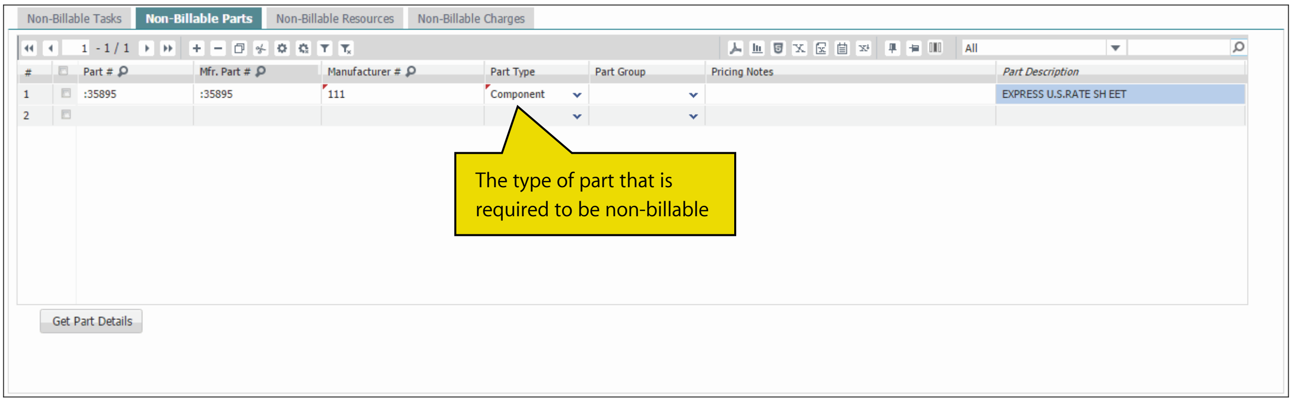


Figure 6.8 Recording non-billable part details

2. Enter the **Part #, Mfr. Part #, Manufacturer #** for which part is required to be non-billable.
3. Use the drop-down list box to specify **Part Type**, **Part Group** and provide textual description of the pricing combination in **Pricing Notes** field.

Recording non-billable resource details

1. Select the **Non-Billable Resources** tab in the **Edit Non-Billable Elements** page. *See Figure 6.9.*

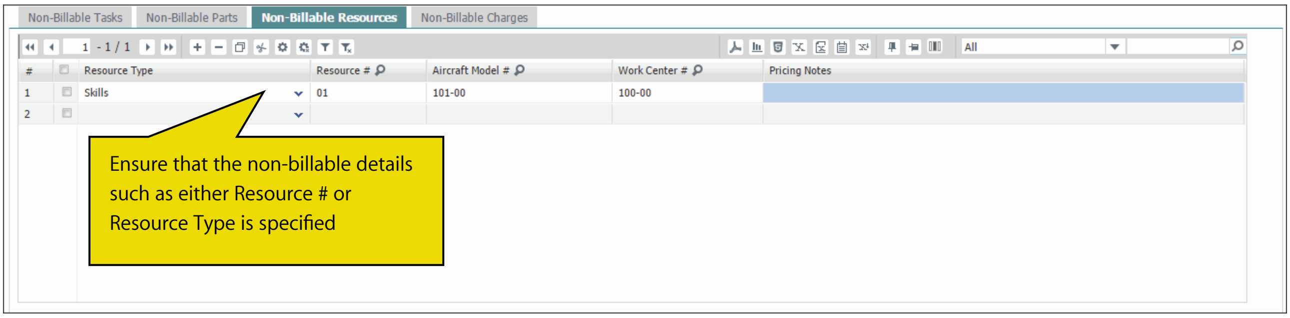


Figure 6.9 Recording non-billable resource details

2. Enter the **Resource Type**, **Resource #**, **Aircraft Model** and **Work Center** for which resource is required to be non-billable.

3. Provide a textual description of the pricing combination for your reference in the **Pricing Notes** field.

Recording non-billable charge details

1. Select the **Non-Billable Charges** tab in the **Edit Non-Billable Elements** page. *See Figure 6.10.*

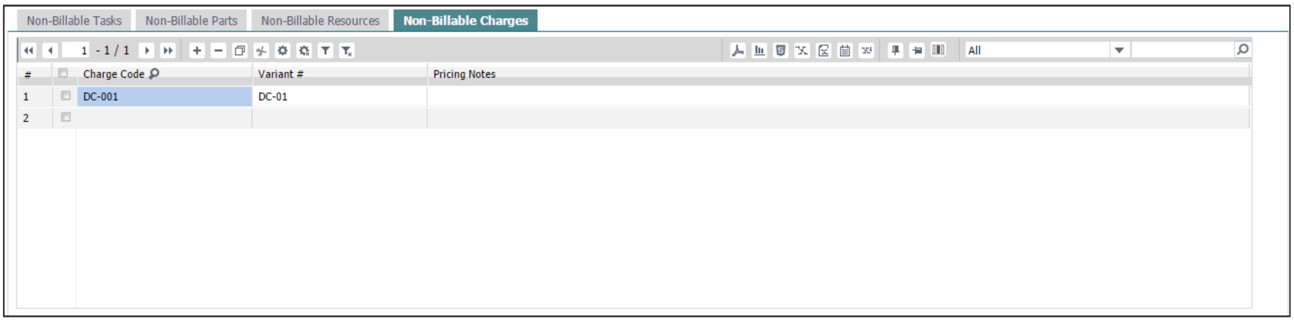


Figure 6.10 Recording non-billable charge details

2. Enter the **Charge Code and Variant #** which is required to be non-billable.

   Note: The Charge Code and Variant # specified here must not be defined as Billable Charges.

3. Provide a description of the pricing combination for your reference in the **Pricing Notes** field.

6.2 ACTIVATING OR INACTIVATING PRICELIST FOR SERVICE SALES

On confirmation, the service pricelist becomes “Active”, if the option “Activation of Service Pricelist” is set as “Not Required” or “Required only for Revisions” in the “Set Options” activity.

6.2.1 ACTIVATING OR INACTIVATING SERVICE PRICELIST

You can activate / inactivate a service pricelist. To prevent the service pricelist from being utilized for estimating any customer order, you can inactivate the service list. The status of the service pricelist is updated as “Active” or “Inactive”, depending upon the action chosen. You can also return the service pricelist and the status is updated as ”Returned”.

1. Select **Activate/Inactivate Service** Pricelist under Service Pricelist business component. The **Activate / Inactivate Service Pricelist** page appears. *See Figure 6.11.*
2. Enter **Search Criteria** to search for the part pricelist and click the **Search** pushbutton.
3. Select the hyperlinked service pricelist number in the multiline. The **Manage Service Pricelist** page appears.

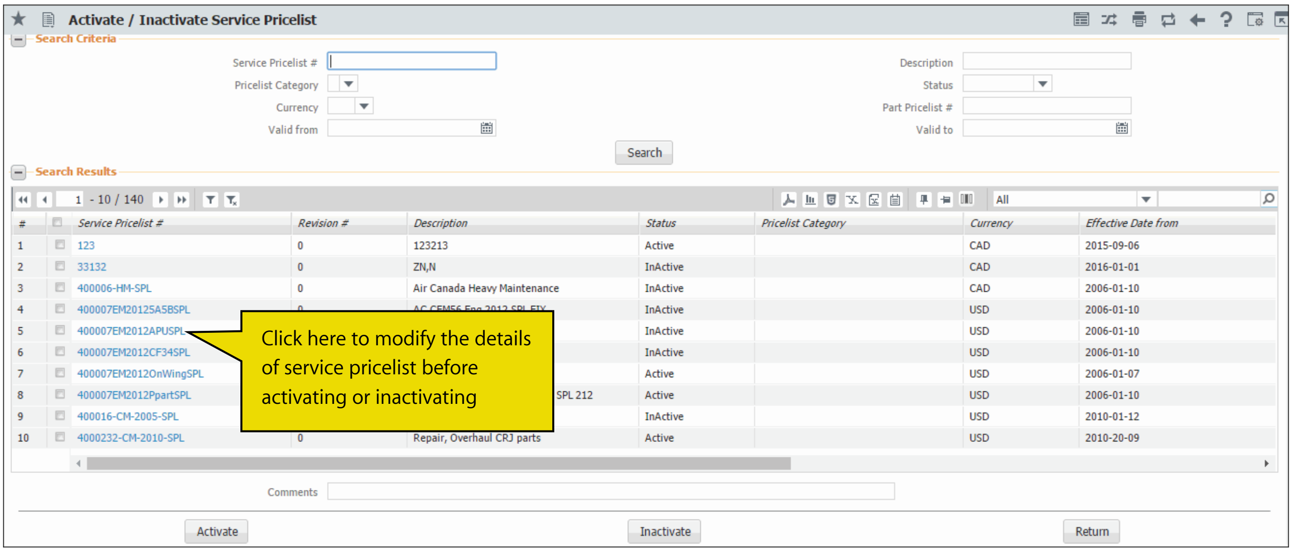


Figure 6.11 Activating or inactivating service pricelist

The system retrieves the details that are already recorded for the service pricelist. You can modify the attribute values as required, before activating a pricelist.

4. Enter the **Description** for the service pricelist.
5. Enter the starting date from which the service pricelist becomes effective, in the **Effective From Date** field.
6. Enter the date till which the service pricelist remains effective, in the **Effective To Date** field.
7. Click the **Activate** pushbutton, to activate the selected service pricelist.
8. Click the **Inactive** pushbutton to inactivate the service pricelist.
9. Click the **Return** pushbutton to return the service pricelist.

6.3 MODIFYING / REVISING PRICELIST FOR SERVICE SALES

Revision of service pricelist occurs after the details of the service pricelist have been ‘Activated’. A service pricelist that is in “Active“ or “Inactive” status can be revised.

1. Select **Edit / Revise Service Pricelist** under **Service Pricelist** business component. The **Select Service Pricelist** page appears. *See Figure 6.12*.

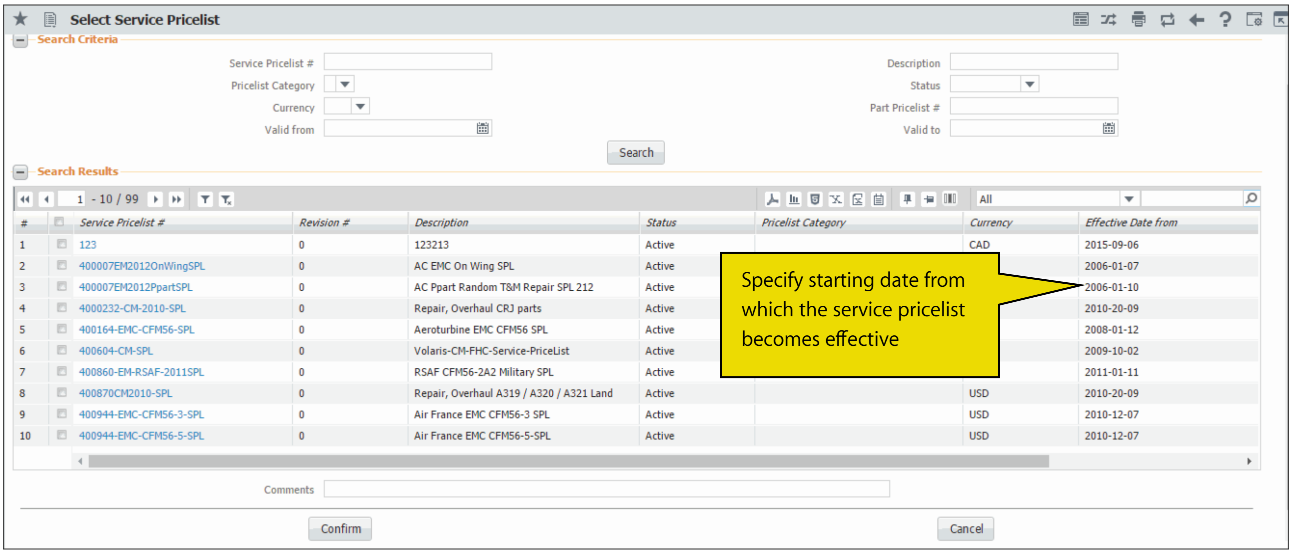


Figure 6.12 Selecting service pricelist for modification

2. Enter **Search Criteria** to search for the part pricelist to be confirmed or cancelled and click the **Search** pushbutton.
3. Enter the comments regarding confirming or canceling the service pricelist, in the **Comments** field.
4. Click the **Cancel** pushbutton to cancel the selected service pricelists.

   Note: The system updates the status of service pricelist as “Canceled”.

5. Click the **Confirm** pushbutton to confirm the selected service pricelists.

   Note: The system updates the status of service pricelist as “Confirmed”.

6. Select the hyperlinked service pricelist number in the multiline to go to the Manage Part Pricelist page.
7. The **Manage Service Pricelist** page appears. *See Figure 6.13*.
8. The system retrieves the details that are already recorded for the service pricelist.
9. Enter the **Description** for the service pricelist.
10. Enter starting date from which the service pricelist becomes effective, in the **Effective From Date** field.
11. Enter the date till which the service pricelist remains effective, in the **Effective To Date** field.

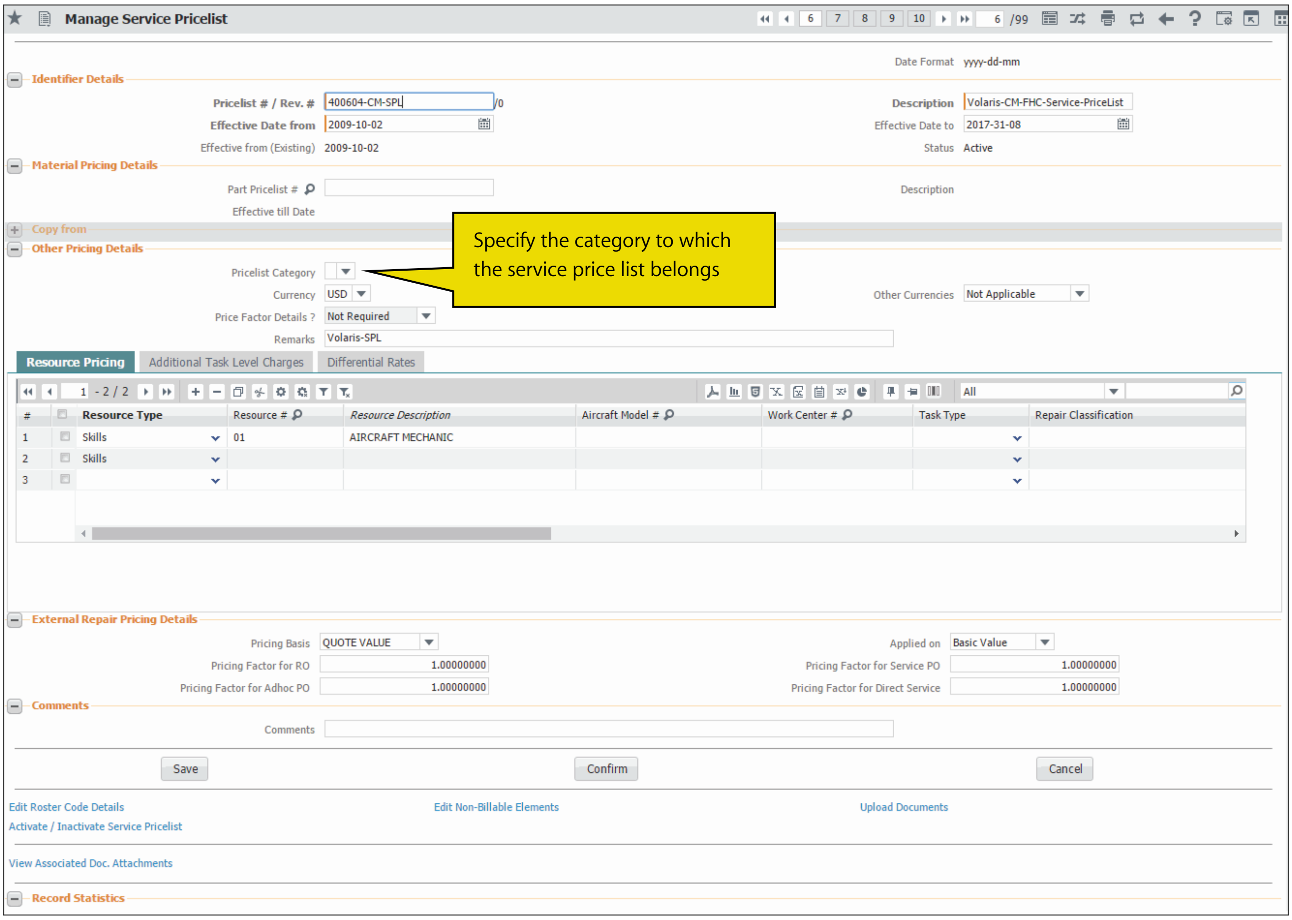


Figure 6.13 Edit service pricelist

12. Enter the number identifying the service pricelist, in the **Service Pricelist #** field.

    Note: This field should not be left blank, when the "Pricing Method" is "Direct". Ensure that the part pricelist usage is marked for service sales.

    Leave this field blank, when the "Pricing Method" is "Work Unit Wise Flat".

13. Click the **Save** pushbutton, to update the revised service pricelist details.

    Note: The system updates the status of the service pricelist as "Fresh" and generates a revision number for the service pricelist.

14. Click the **Confirm** pushbutton, to confirm the service pricelist.

    Note: The system updates the status of the service pricelist as "Confirmed", only when the "Activation of Service Pricelist" drop-down list box in the set options activity of the current business component is set as either "Required" or "Required only for Revisions". If the set options activity, is set as "Not Required", then system updates the status of the service pricelist along with the revision # as "Active". The existing Active or Inactive service pricelist's status becomes as "Revised".

15. Click the **Cancel** pushbutton, to cancel the service pricelist.

SALE CONTRACT - SERVICES

The Sale Contract – Services business component enables you to keep a record of essential contract information. You will be able to record multiple information relating to a contract.

A contract after confirmation is queued for approval by the authorized authority. After approval, the contract is deemed to be effective. On approval, the status of the contract becomes “Approved”. The details of this contract cannot be modified, but you have the option to revise the contract details even after it is confirmed.

In the “Approve / Close Customer Contract” screen, the customer service manager will be able to approve or close customer contracts which have been completed. You also you have the provision to return or close a contract.

Pre-closure of a contract is also possible by providing a termination date and closing the contract.

7.1 CREATING A CUSTOMER CONTRACT

7.1.1 CREATING AN ENTITY FOR CUSTOMER CONTRACT

Apart from other entities, you can create entities in this page which are crucial for the various processes involving the creation of a customer contract.

You can set default options for the various fields in the activities of the **Sale Contract – Services** business component. You can also modify the options that are already defined.

1. Select **Define Process Entities** under the **Common Masters** business component. The **Define Process Entities** page appears. *See Figure 7.1*.

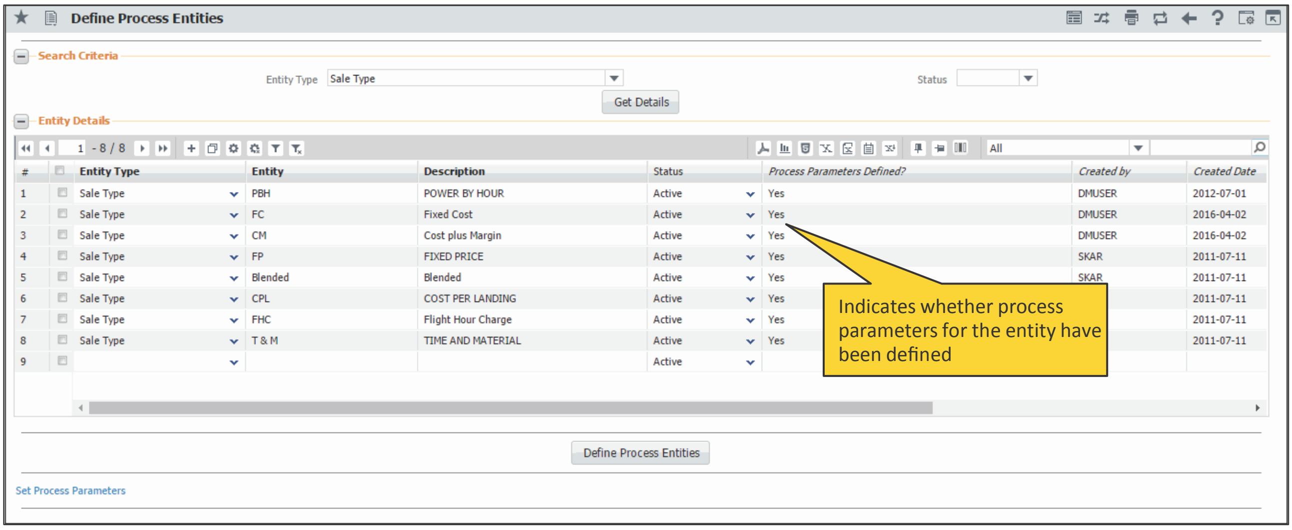


Figure 7.1 Creating entity

2. Use the drop-down list box to indicate the **Entity Type** for which you wish to set parameters.
3. Use the drop-down list box to specify the status of the entity as “Active” or “Inactive”.
4. Click the **Get Details** pushbutton, to retrieve the entity details in the multiline.

   Note: You cannot modify any of the above entity details after it is created. However, you can modify process parameters of an entity in the “Set Process Parameters” activity.

5. Click the **Define Process Entities** pushbutton to save the details of the new entity.

7.1.2 DEFINING / MODIFYING THE ATTRIBUTES OF AN ENTITY FOR CUSTOMER CONTRACT

At any point of time, as per your business needs, you can define or modify various process parameters that impact activities associated with an entity. For example, you can set a specific attribute of an entity as mandatory or required. You can also set an attribute as not required or not applicable for an entity.

1. Select the **Set Process Parameters** link in the **Define Process Entities** activity. The **Set Process Parameters** page appears. *See Figure 7.2*.

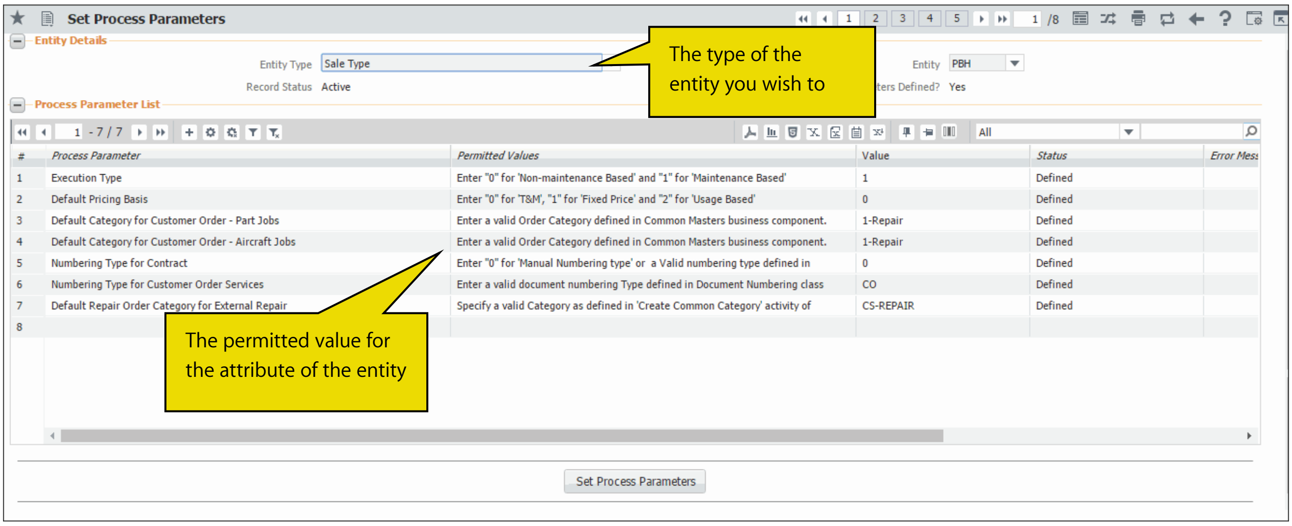


Figure 7.2 Setting process parameters

In the Entity Details group box,

2. Use the drop-down list box to select the **Entity Type** of the entity you want to define or modify.
3. Use the drop-down list box to select the **Entity**.
4. Select the **Set Process Parameters** pushbutton to update the attributes defined for the entity.

7.1.3 CREATING NUMBERING TYPE FOR A CONTRACT

You can create a numbering type in this page based on which the contract numbers will appear. You have the option to define the various combinations of prefix, suffix, starting number and ending number of a contract. Also, you can specify the period during which the numbering type must be effective.

1. Select **Create Numbering Type** under the **Document Numbering Class** business component. The **Create Numbering Type** page appears. *See Figure 7.3*.

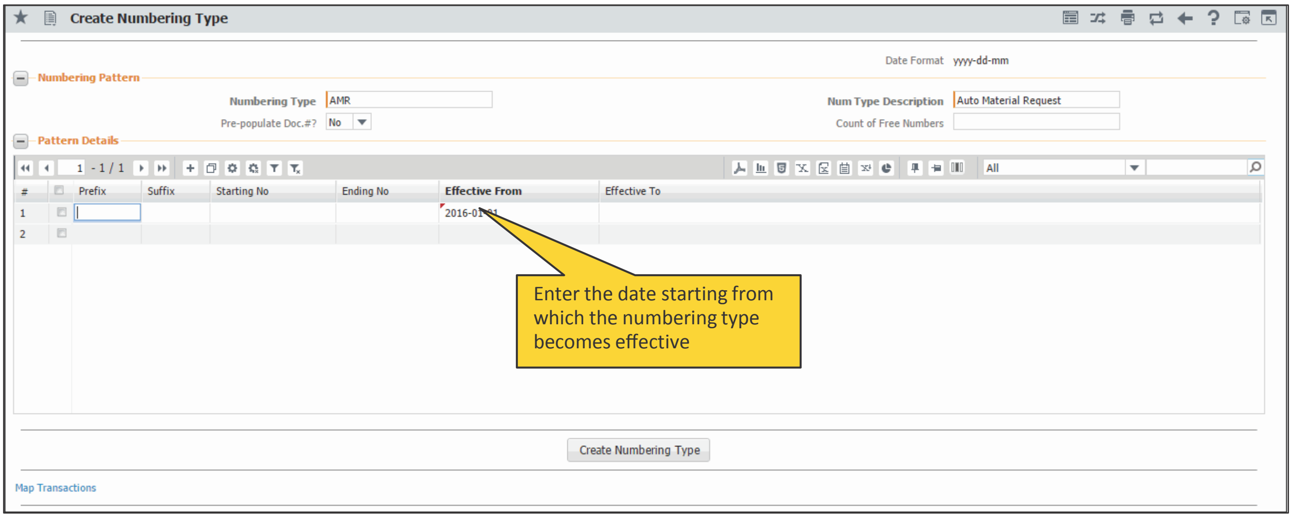


Figure 7.3 Creating numbering type

2. Enter a unique code identifying the **Numbering Type**. It can be a combination of alphabets and numbers and the **Num Type Description** in the **Numbering Pattern** group box.
3. Enter the starting date from which the numbering type will be effective and the date up to which the numbering type will be effective in the **Effective From** and **Effective To** fields in the **Pattern Details** multiline.
4. Click the **Create Numbering Type** pushbutton to create a numbering type for the contract.

To provide further details,

- Select **Map Transactions** link to map the numbering type to the organization unit.

7.1.4 MAPPING NUMBERING TYPE FOR CUSTOMER CONTRACT CREATION

You can map the numbering type to organizational units and transaction types using this page. For example, the numbering type can be mapped to the transaction types like customer order based invoice, debit credit note etc. Also, you can set the default numbering type for multiple transaction types.

1. Select the **Map Transactions** link in the **Create Numbering Type** page. The **Transaction Mapping** page appears**.** *See Figure 7.4*.
2. Enter the **Numbering Type** and **Description** to be mapped to the transaction types of the specified organizational units.

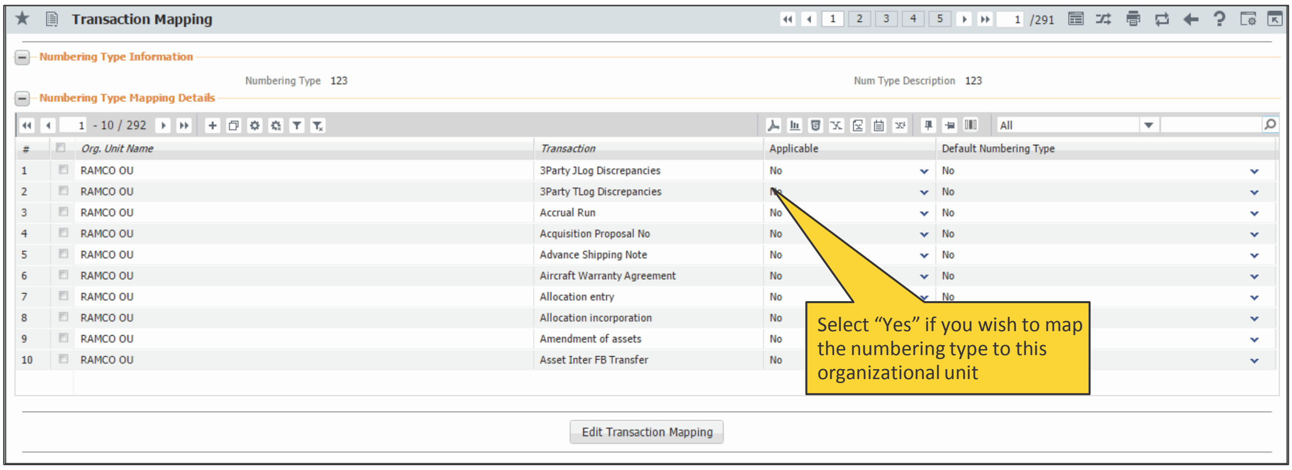


Figure 7.4 Mapping numbering type to transactions

3. Click the **Map Transactions** pushbutton to map the numbering type to the transaction type belonging to the particular organization unit.

7.1.5 MODIFYING NUMBERING TYPE FOR CONTRACTS

You can select and modify the numbering type using this page.

1. Select the **Edit Numbering Type** activity under the **Document Numbering Class** business component.
2. The **Select Numbering Type** page appears.
3. Enter **Numbering Type** directly and select the **Edit Numbering Type** link provided alongside. Or, provide **Search Criteria** to search for a numbering type, click the **Search** pushbutton. Click the hyperlinked **Numbering Type** in the multiline. The **Edit Numbering Type** page appears.

To provide further details,

- Select **Edit Transaction Mapping** link to modify the numbering type mapping to the organization unit.

7.1.6 CREATING / MODIFYING CUSTOMER CONTRACT

This activity enables you to keep a record of essential contract information. You will be able to record multiple information relating to a contract, in the various tabs.

1. Select the **Manage Customer Contract** activity under the **Sale Contract – Services** business component. The **Manage Customer Contract** page appears. *See Figure 7.5*.

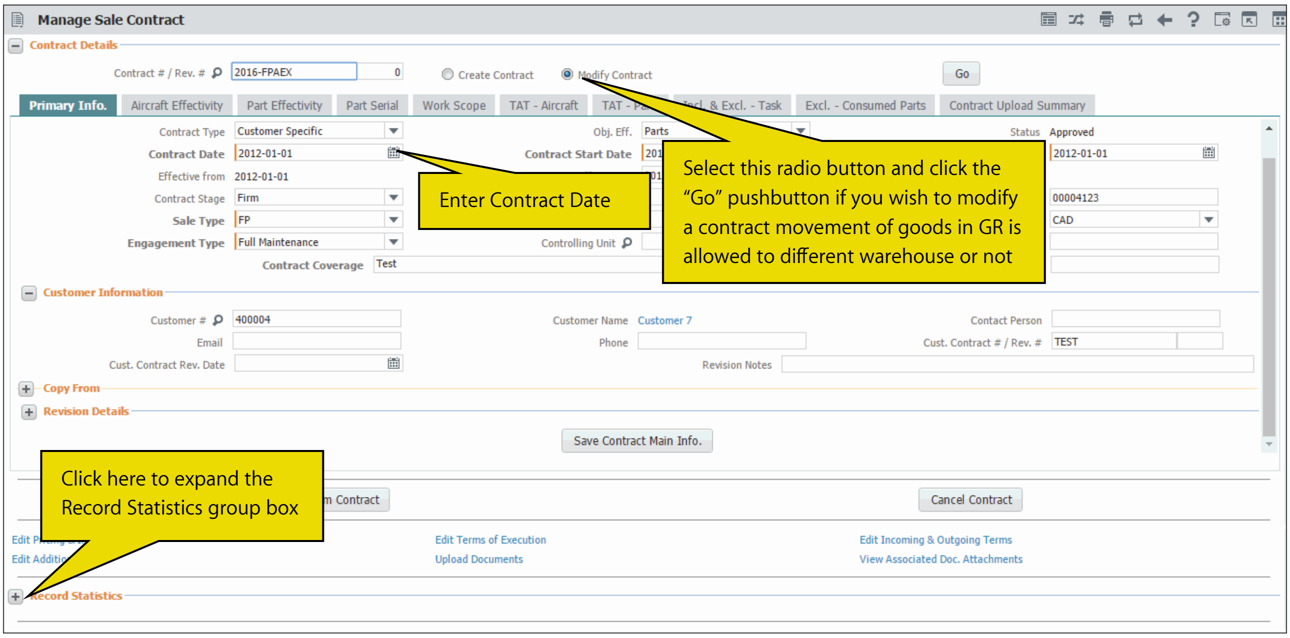


Figure 7.5 Managing customer contract

Figure 7.5a Viewing record statistics

2. Enter the **Contract / Rev #**.
3. Select the **Create Contract** or **Modify Contract** radio buttons to create or modify the details of a contract.
4. Click the **Go** pushbutton to retrieve the search details.

To proceed further,

- Select the **Primary Info.** tab to record primary contract information.

Refer to the topic "**Recording primary contract information**" for more details.

- Select the **Aircraft Effectivity** tab to record the details of aircraft covered in the contract.

Refer to the topic "**Recording aircraft effectivity details**" for more details.

- Select the **Part Effectivity** tab to record part covered in the contract.

Refer to the topic "**Recording part effectivity details**" for more details.

- Select the **Part Serial** tab to record serial numbers for the part covered in the "Part Effectivity" tab.

Refer to the topic "**Recording part serial details**" for more details.

- Select the **Work Scope** tab to record the scope of work to be performed on the object covered in the contract.

Refer to the topic "**Recording work scope details**" for more details.

- Select the **TAT - Aircraft** tab to record the time required to service an aircraft for a given effectivity or repair process code.

Refer to the topic "**Recording turnaround details for aircraft**" for more details

- Select the **TAT - Parts** tab to record the time required to service a part for a given effectivity or repair process code.

Refer to the topic "**Recording turnaround details for parts**" for more details

- Select the **Incl. & Excl. – Task** tab to include / exclude pricing basis for objects serviced.

Refer to the topic "**Recording task inclusion and exclusion details**" for more details.

- Select the **Excl. – Consumed Parts** tab to record exclusions for parts covered in the contract.

Refer to the topic "**Recording exclusions for consumed parts**" for more details.

- Select the **Contract Upload Summary** tab to view a summary of mandatory tab pages for which data is to be provided.

Refer to the topic "**Viewing contract upload details**" for more details.

5. Click the **Confirm Contract** pushbutton to confirm a contract.
6. Click the **Cancel Contract** pushbutton to cancel a contract.

To proceed further,

- Select the **Edit Pricing & Invoice Details** link at the bottom of the page to record the pricing information for objects covered in the contract.
- Select the **Edit Terms of Execution** link at the bottom of the page to record terms and conditions of the contract.
- Select the **Edit Incoming & Outgoing Terms** link at the bottom of the page to record shipping and billing details of the customer.
- Select the **Edit Additional Info** link at the bottom of the page to record additional information for the contract.
- Select the **Upload Documents** link at the bottom of the page to upload the documents.

Refer to the "Object Attachments" online help for more details.

- Select the **View Associated Doc. Attachments** link to view the associated document attachments.

Refer to the "Object Attachments" online help for more details.

Recording primary contract information

This tab appears by default on launch of the **Manage Customer Contract** screen. Using this tab you can record primary contract information including customer-specific details.

1. Select the **Part Info.** tab in the **Manage Customer Contract** page. See Figure 7.6.

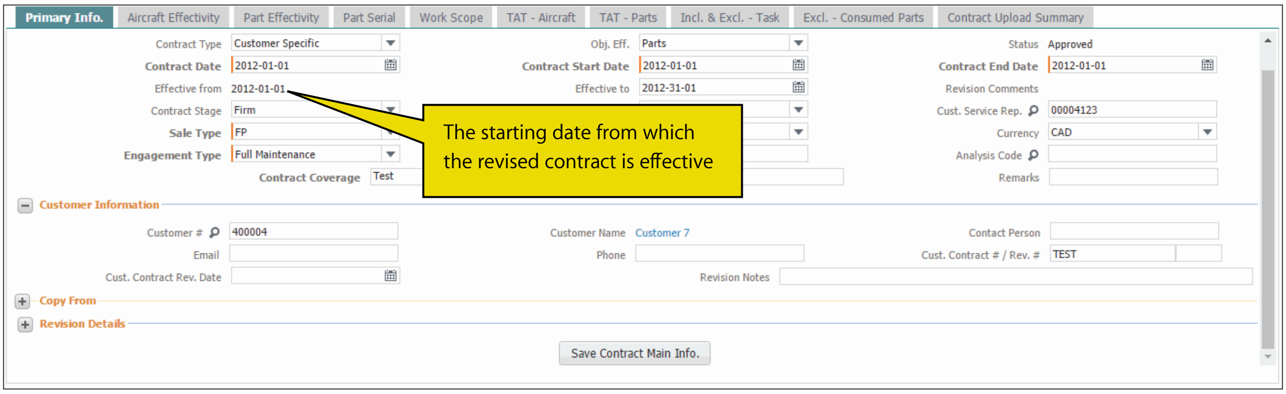


Figure 7.6 Recording primary information

2. Enter the **Contract Date**, **Contract Start Date** and **Contract End Date** fields.
3. Use the drop-down list box to specify the **Sale Type**, **Engagement Type** and **Contract Coverage**.
4. Enter details in the **Customer Information** group box.
5. Enter the **Revision Details** group box if you wish to revise details of the contract.
6. Click the **Save Contract Main Info.** pushbutton to confirm a contract.

Viewing contract upload summary

This section provides you a consolidated view of information that is required to be provided. You can view the mandatory tabs in which you will have to enter details for the contract to be effective.

1. Select the **Contract Upload Summary** tab in the in the **Manage Customer Contract** page. *See Figure 7.7*.

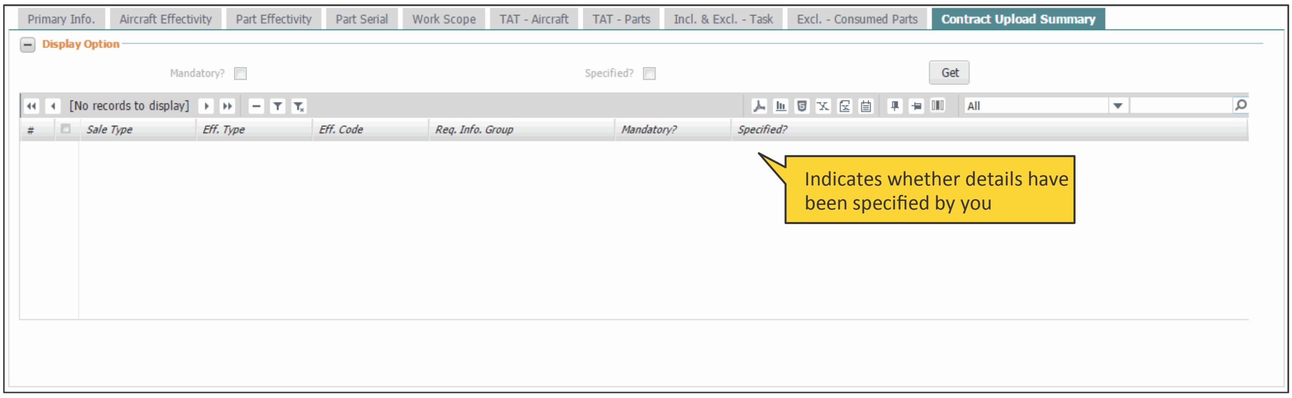


Figure 7.7 Viewing contract upload summary

2. Select any of the **Mandatory?** or **Specified?** checkboxes in the **Display Option** group box.

   Note: The system displays a list of tabs which are mandatory, but not yet specified, in the "Req. Info Group" field in the multiline.

Recording part effectivity details

Using this tab you can specify the details of parts that are to be serviced under the contract.

1. Select the **Part Effectivity** tab in the **Manage Customer Contract** page. *See Figure 7.8*.

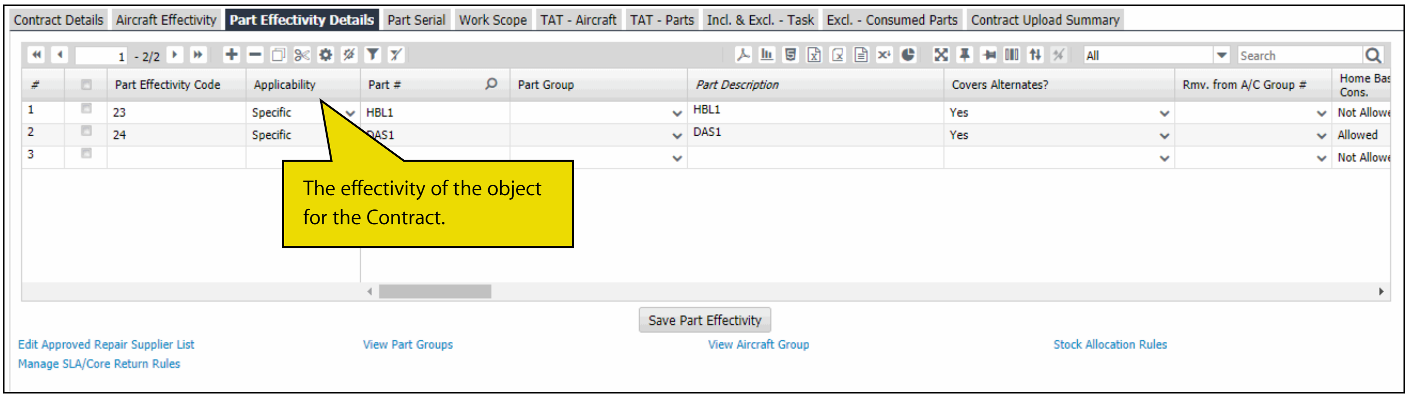


Figure 7.8 Recording part effectivity details

2. Enter the **Part Eff. Code**, **Mfr. Part #**, **Mfr. #**, **Eff. Type**, **Covers Child Parts?**, **Visit Count** and other details in the multiline.

3. Click the **Save Part Effectivity** pushbutton to record details of parts covered in the contract.

To proceed further,

- Select the **Edit Approved Repair Supplier List** link at the bottom of the tab page to define external suppliers to whom parts are sent for service.
- Select the **View Part Group** link at the bottom of the tab page to view details of the part group.
- Select the **View Aircraft Group** link at the bottom of the tab page to view details of the aircraft group.
- Select the **Stock Allocation Rules** to view/Create the Allocation Rules based on the Contract and Customer.
- Select the **Manage SLA/Core Return Rules** The SLA and Core return rules can be set currently only for services such as Sourcing, Acknowledgement, and Returns.

Recording part serial details

Using this tab you can specify the serial number for the part covered in the **Part Effectivity** tab.

1. Select the **Part Serial** tab in the in the **Manage Customer Contract** page. *See Figure 7.9*.

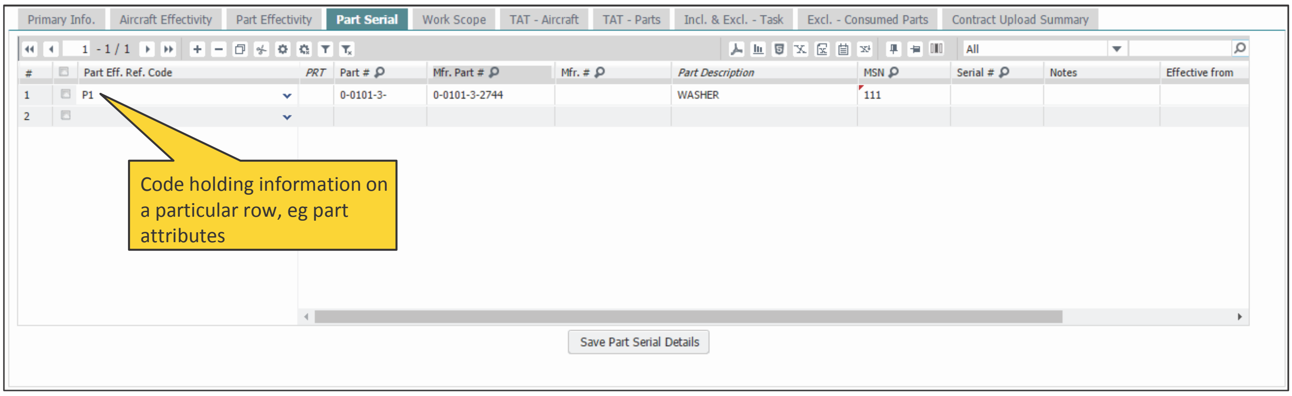


Figure 7.9 Recording part serial effectivity details

2. Enter the **Part Eff. Ref. Code**, **MSN**, **Serial #**, **Effective From**, **Effective To** and other details in the multiline.
3. Click the **Save Part Serial Details** pushbutton to record details of part serials in the contract.

To proceed further,

- Select the **Edit Approved Repair Supplier List** link at the bottom of the tab page to define external suppliers to whom parts are sent for service.
- Select the **View Part Group** link at the bottom of the tab page to view details of the part group.
- Select the **View Aircraft Group** link at the bottom of the tab page to view details of the aircraft group.

Recording aircraft effectivity details

Using this tab you can specify the aircrafts that are to be serviced under a contract.

Note: The object effectivity in the Primary Info tab must be Aircraft for you to proceed in this page.

1. Select the **Aircraft Effectivity** tab in the in the **Manage Customer Contract** page. *See Figure 7.10*.

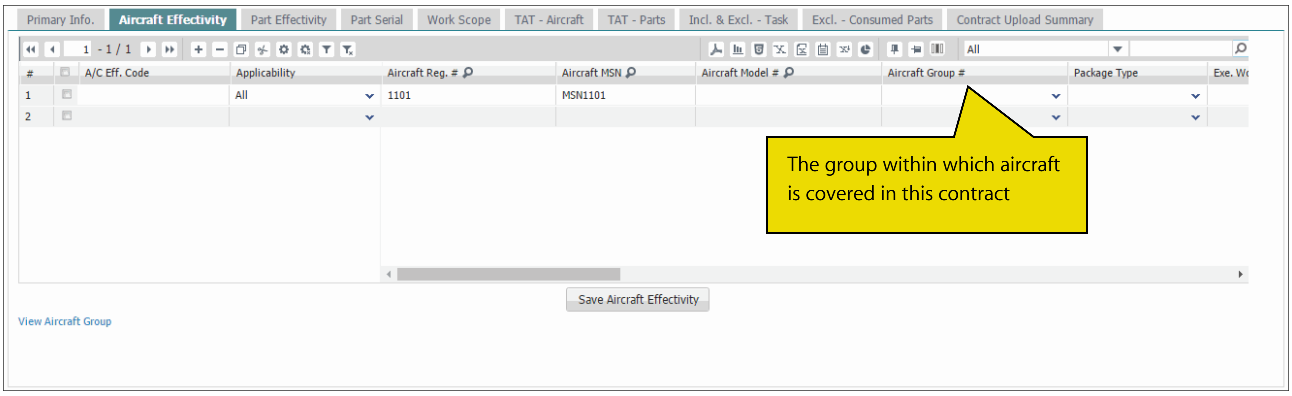


Figure 7.10 Aircraft effectivity details

2. Enter the ***A/C Eff. Code,* Aircraft Model #, Aircraft Group #, Package Type, Exe. Work Center, Customer Group #, Visit Count, Exp. Visit Count, Sale Type** and other details in the multiline.
3. Click the **Save Aircraft Effectivity** pushbutton to record details of aircraft in the contract.

Note: Ensure that the Aircraft Effectivity combination ie., Aircraft Reg. #, Aircraft MSN, Aircraft Model #, Aircraft Group #, Package Type and Exe. Work Center is not duplicated in another row in the multiline.

To proceed further,

- Select the View Aircraft Group link at the bottom of the tab page to view details of the aircraft group.

Recording standard work scope details

Using this tab you can record scope of work to be performed under a contract.

1. Select the **Work Scope** tab in the **Manage Customer Contract** page. *See Figure 7.11*.

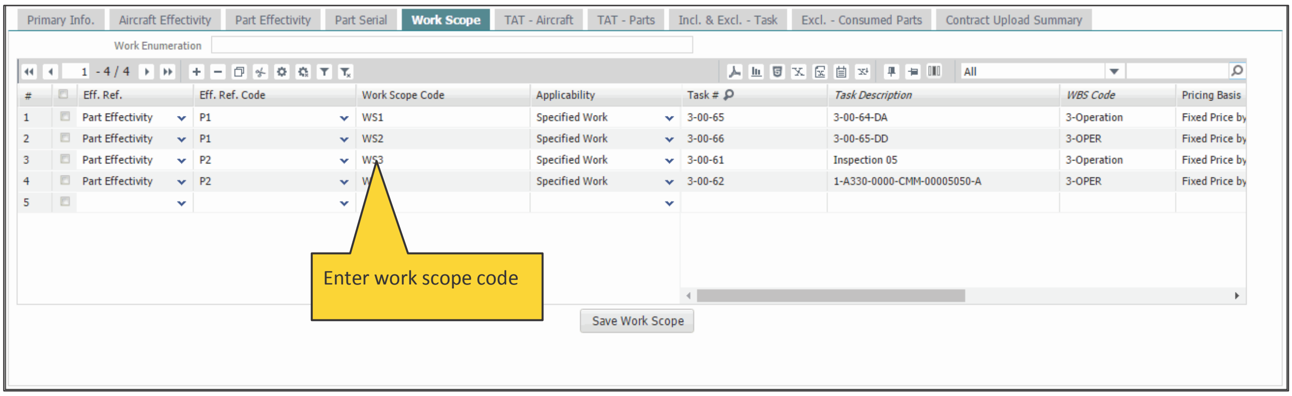


Figure 7.11 Recording standard work scope details

2. Enter the **Work Enumeration** field.
3. Enter the **Eff. Ref.**, **Eff. Ref. Code, Work Scope Code**, and other details in the multiline.
4. Click the **Save Work Scope** pushbutton to record scope of work to be performed.

Recording turnaround time details for aircraft

Using this tab you can record the time period to service the objects for each effectivity code.

1. Select the **TAT** - **Aircraft** tab in the in the **Manage Customer Contract** page. *See Figure 7.12*.

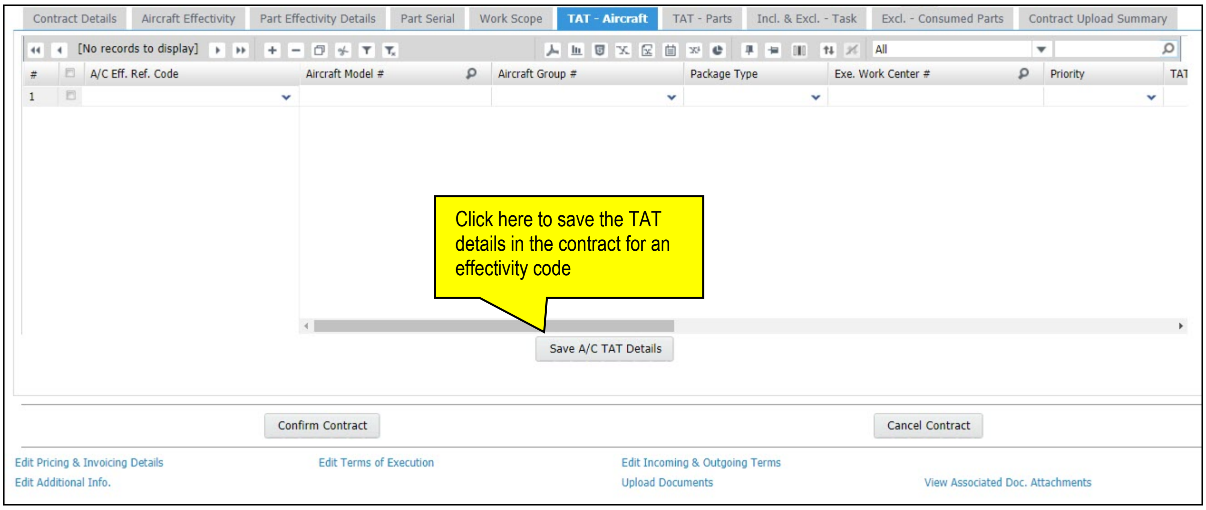


Figure 7.12 Recording turnaround time details

2. Enter the **A/C Eff. Ref Code**, **Aircraft Model #**, **Aircraft Group #**, **Package Type**, **Exe. Work Center #** and other details in the multiline.
3. Select the **Priority**, **TAT Start Ref. Date** and **TAT End Ref. Date, TAT - Cust**, **TAT – Planning** and **TAT – Stated In** to specify the unit of time in which TAT is described.
4. Click the **Save A/C TAT Details** to save tat details in the contract for the particular effectivity code.

Recording turnaround time details for parts

Using this tab you can record the time period to service the object for each effectivity code.

1. Select the **TAT - Part** tab in the in the Manage Customer Contract page. See Figure 7.13.

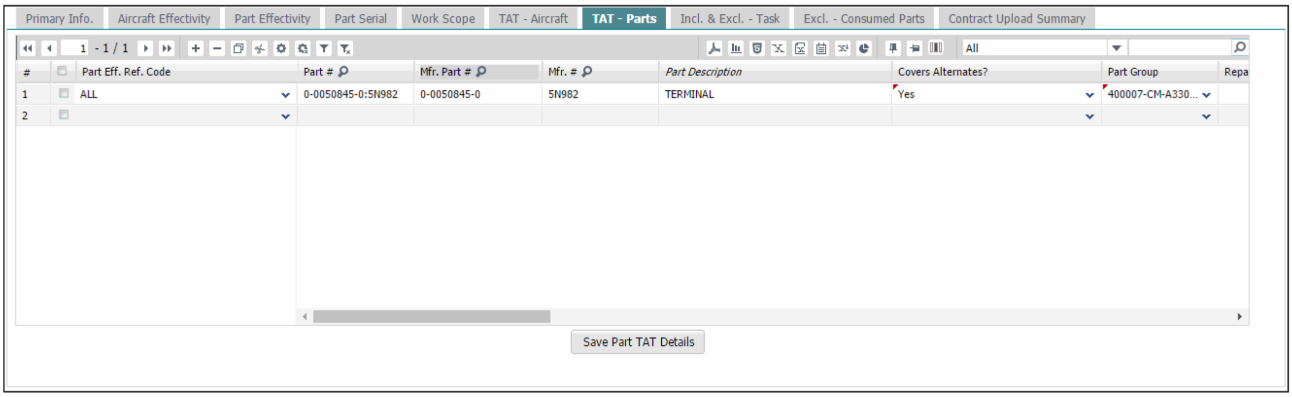


Figure 7.13 Recording turnaround time details for parts

2. Enter **Part Eff. Ref. Code**, **Repair Process Code** and other details.

3. Select the **Priority**, **TAT Start Ref. Date** and **TAT End Ref. Date**, **Shop TAT - Cust**, **Shop TAT – Planning**, **Ext. Rep. TAT – Cust**. and **TAT – Stated In** to specify the unti of time in which TAT is described.

4. Click the **Save Part TAT Details** to save tat details in the contract for the particular effectivity code.

Recording task inclusions and exclusions

Using this tab you can record inclusions and exclusions for the tasks.

1. Select the **Inclusions & Exclusions - Task** tab in the in the **Manage Customer Contract** page. *See Figure 7.14*.

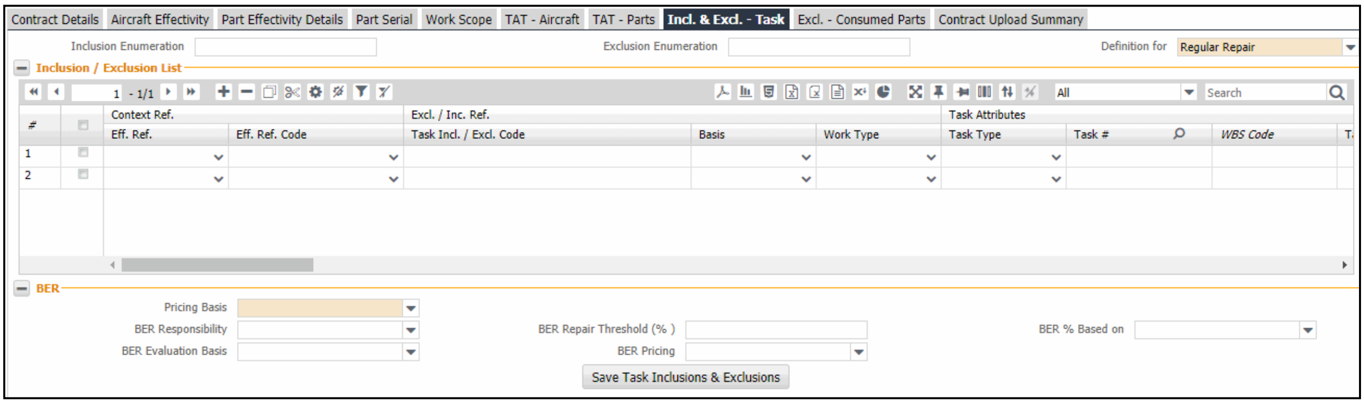


Figure 7.14 Recording task inclusions and exclusions

2. Enter the **Inclusion Enumeration** and **Exclusion Enumeration** details and use the Definition For drop-down list box to specify the basis on which you wish to include repair cost in exchange fee.

3. In the **Inclusion / Exclusion List** multiline provide details in the columns grouped under **Context Ref.**, **Excl. Incl. Ref, Task Attributes**, **Discrepancy Attributes**, **Execution Attributes**, **Eng. Doc. Attributes**, **Eng, Doc, Eff, Date**, **Ref, Engineering Ref**, **Eng. Restriction**, **Eng. Task Excl,-Value Coverage**, **Exclusion Pricing** and **Excl. Incl. Effectivity**, .

4. Click the **BER** group box to enter details of tasks which are beyond economic repair, like **Pricing Basis**, **BER Responsibility**, **BER Repair Threshold (%)** and **BER Pricing**.

5. Click the **Save Task Inclusions & Exclusions** to record inclusions and exclusions for tasks.

Recording exclusions for consumed parts

Using this tab you can record exclusions for parts covered in the contract.

1. Select the **Exclusions – Consumed Parts** tab in the **Manage Customer Contract** page. *See Figure 7.15*.

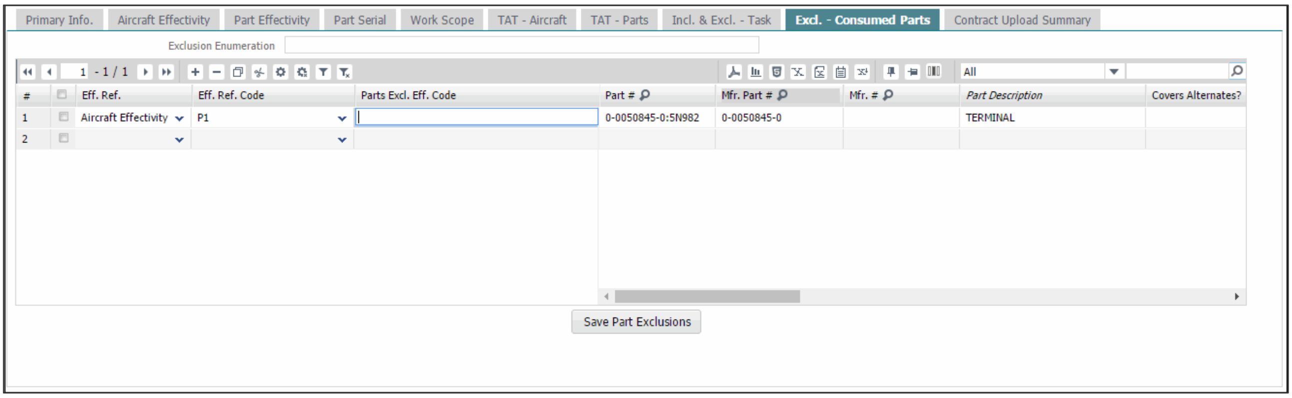


Figure 7.15 Recording exclusions – consumed parts

2. Enter the **Exclusion Enumeration** field.
3. Enter the **Eff. Ref., Eff. Ref. Code, Part #,** and other fields in the multiline.
4. Click the **Save Part Exclusions** to record exclusions of consumed part to the contract.

7.1.7 APPROVING CUSTOMER CONTRACT

This activity enables you to approve customer specific and general contracts which have been completed. Also, you have the provision to return or close a contract.

1. Select the **Approve / Close Customer Contract** activity in the **Sale Contract – Services** business component. *See Figure 7.16*.

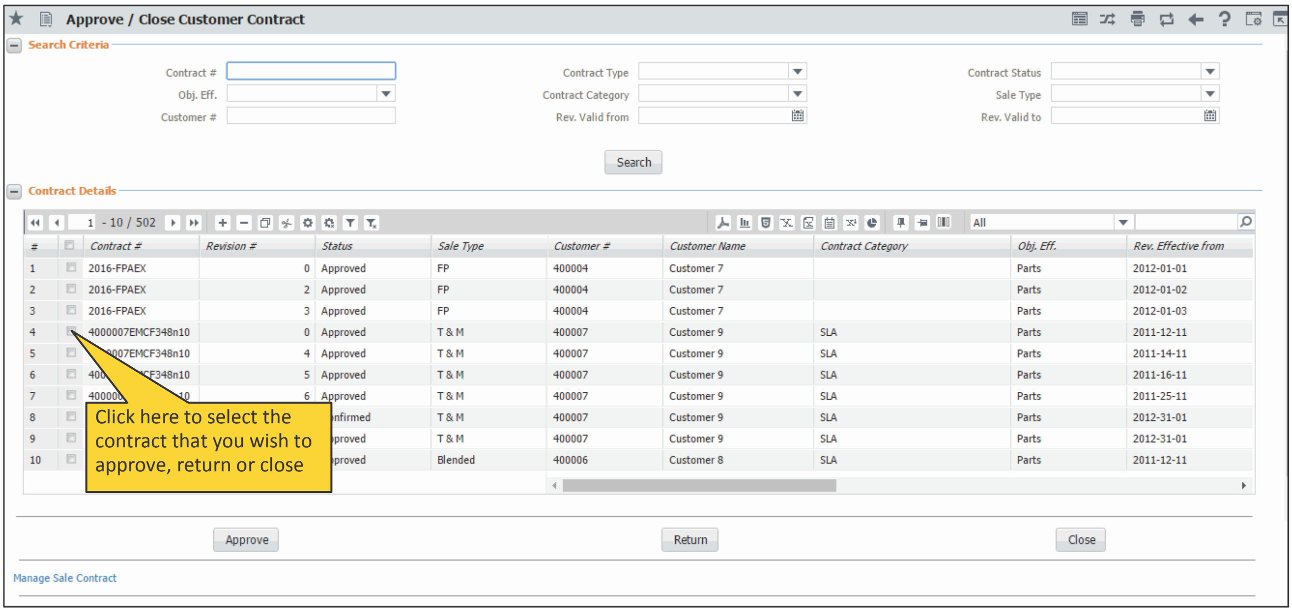


Figure 7.16 Approving customer contract

In the **Search Criteria** group box,

2. Enter the **Contract #** directly or enter the search criteria details to search for a contract number and click the **Search** pushbutton to retrieve the search results in the multiline.

   Note: The system retrieves all the contract numbers that are similar to the search criteria entered.

3. Select the checkboxes in the multiline to select the contracts you wish to approve.
4. Select the **Approve** pushbutton, to approve the selected contract.

   Note: Only Contract # / Revision # which are in "Confirm" status can be approved.

For Closing or returning a contract, in the **Contract Details** multiline,

5. Enter the reasons for modifying or closing the contract, in the **Reasons For Return / Closure** field.

6. Enter the date on which the contract is closed, in the **Termination Date** field.

Provide any **Remarks** associated with the contract.

7. Select the **Return** pushbutton to return the contract.

   Note: Only Contract # / Revision # which are in "Confirm" status can be returned.

8. Click the **Close** pushbutton to terminate the contract.

   Note: You can close a contract only if all its revisions, which are in "Approved" status, are selected for closure.

To proceed further,

- Select the **Manage Sale Contract** to record sale contract details.

7.1.8 MAINTAINING OBJECT REFERENCE DATES

This activity enables you to capture multiple reference dates used to determine the eligibility of billing for an aircraft. This screen facilities the user to maintain and define the actual dates for these references.

1. Select the **Maintain Object Ref. Dates** activity in the **Sale Contract – Services** business component. *See Figure 7.17*.

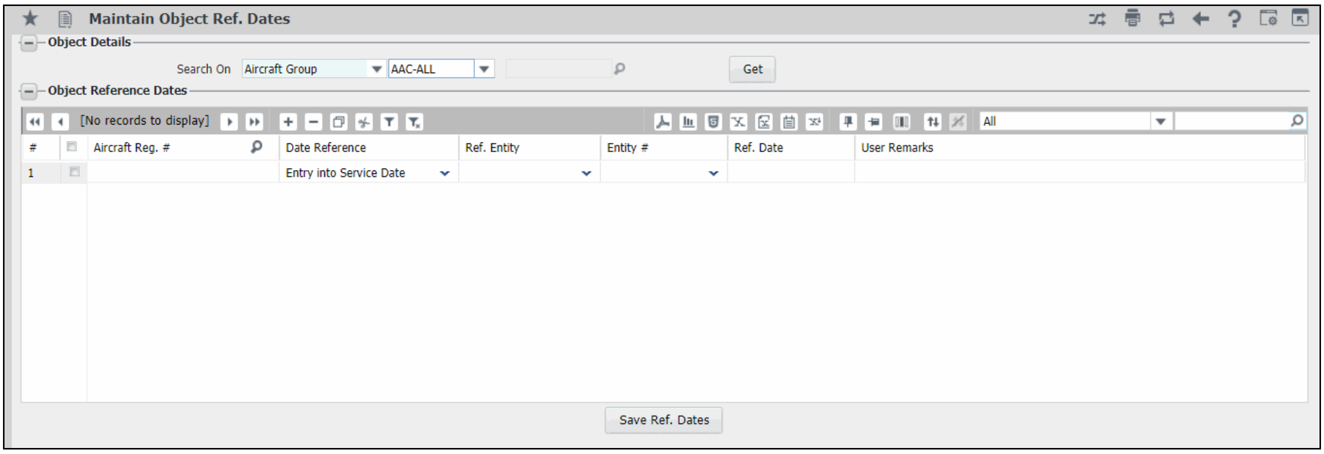


Figure 7.17 Manage Object Ref. Dates

In the **Object Details** group box,

2. Enter the **Search On** and other details to retrieve the already defined reference dates for various aircrafts.

3. Select the **Get** pushbutton to retrieve the search details in the **Object Reference Dates** multiline.

4. Enter the **Date Reference** to identify the date that is defined against each aircraft.

5. Enter the other details like **Ref. Entity**, **Entity #**, **Ref Date** and provide any user specific remarks or notes pertaining to the date defined in the **User Remarks** column.

   *Note: You can modify the **Ref. Date** even if the release has been already generated.*

6. Click the **Save Ref. Dates** pushbutton to save the details.

   Note: You can either extend a given reference date or pre-pone the date as required.

7.1.9 SETTING PARAMETERS FOR TASK-BILLING ELEMENT MAPPING

This page provides the list of the parameters such as Customer, Contract #, Task #, Task type, task Category out of which user can specify the Parameters which needs to be used for mapping the billing element.

1. Select the **Task-Billing Element Mapping** activity in the **Sale Contract – Services** business component. *See Figure 7.18*.

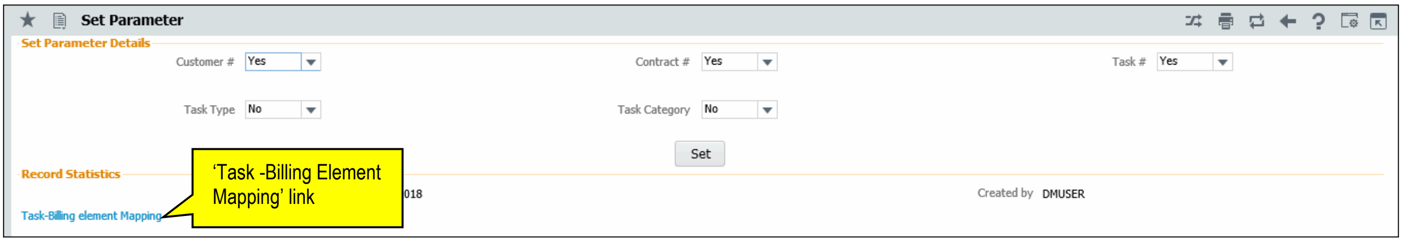


Figure 7.18 Setting Parameters for Task Billing Element mapping

In the **Set Parameter Details** group box,

2. Use the **Customer #, Contract #, Task #, Task Type and Task Category** drop-down list box to specify the combination with which the billing element mapping is to be done.
3. Click the **Set** pushbutton to save the values selected for each parameter.

To proceed further,

- Select the **Task-Billing Element Mapping** to map the billing element with the task directly or with the task attributes.

7.1.10TASK-BILLING ELEMENT MAPPING

This activity enables the user to either map the billing element with task directly or map with the Task attributes such as Task Type, Task Category.

1. Select the **Task-Billing Element Mapping** link at the bottom of the **Set Parameters** page. *See Figure 7.19*.

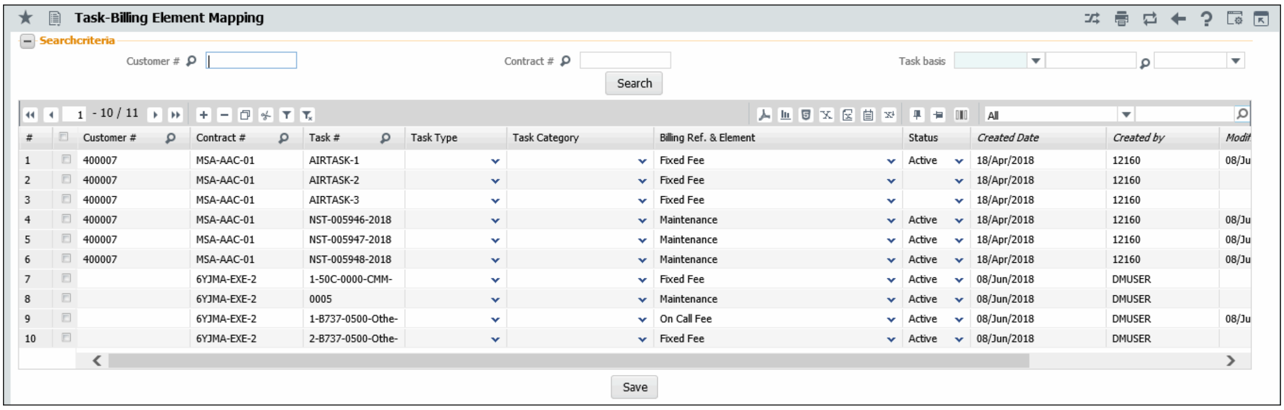


Figure 7.19 Task Billing Element mapping

In the **Search Criteria** group box,

2. Enter the **Customer #**, **Contract #** and select the **Task Basis** drop-down list box to retrieve the already defined Task-Billing Element Mapping.
3. Click the **Search** pushbutton to retrieve the search results in the multiline.
4. Enter the **Customer #**, **Contract #**, **Task #** of the Task-Billing Element mapping.
5. Use the drop-down list box to specify the **Task Type** and **Task Category** with which the billing element is to be mapped.
6. Use the **Billing Ref. & Element drop-down list box** to specify the Billing Reference and Element with which the task basis is to be mapped.
7. Use the **Status** drop-down list box to select the status which could be 'Active' or 'Inactive'.
8. Click the **Save** pushbutton to record the mapping of tasks with the billing element.

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Corporate Office and R&D Center

RAMCO SYSTEMS LIMITED

64, Sardar Patel Road, Taramani,
Chennai – 600 113, India

Office : + 91 44 2235 4510 / 6653 4000

Fax : +91 44 2235 2884

Website : www.ramco.com