

RAMCOAVIATION SOLUTION VERSION 5.9 USER GUIDE SALES SETUP

ramco

©2021 Ramco Systems Limited. All rights reserved. All trademarks acknowledged.

This document is published by **Ramco Systems Ltd**. without any warranty. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose without the written permission of **Ramco Systems Limited**.

Improvements and changes to this text necessitated by typographical errors, inaccuracies of current information or improvements to software programs and/or equipment, may be made by Ramco Systems Limited, at any time and without notice. Such changes will, however, be incorporated into new editions of this document. Any hard copies of this document are to be regarded as temporary reference copies only.

The documentation has been provided for the entire Aviation solution, although only a part of the entire solution may be deployed at the customer site, in accordance with the license agreement between the customer and **Ramco Systems Limited**. Therefore, the documentation made available to the customer may refer to features that are not present in the solution purchased / deployed at the customer site.

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 sicon 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.

contents

1	INTRODUCTION	6
2	CUSTOMER SETUP	8
2		9
2	2.1.1 SETTING SALES PROCESS PARAMETERS	9
	2.1.2 CREATING CUSTOMER DETAILS	9
2.2	2 GROUPING CUSTOMER	18
	2.2.3 CREATING CUSTOMER GROUP	18
2.	B ACTIVATING CUSTOMER	19
2.4	MAINTAIN AUTOMATION RULES	20
	2.4.1 MAINTAIN AUTOMATION RULES FOR CUSTOMER REQUESTS	20
2.	5 MAINTAIN INCO TERMS	21
	2.5.1 MAINTAINING AGREED INCO TERMS	21
	2.5.2 MAINTAINING DEFAULT RULES FOR INCO TERMS	21
2.	5 MANAGE PRICE ESCALATIONS	22
	2.6.3 MANAGING PRICE ESCALATIONS	22
2.	7 MANAGE SLA/CORE RETURN RULES	23
	2.7.4 MANAGING SLA / CORE RETURN RULES	23
2.8	8 RECORDING SALES POINT SPECIFIC INFORMATION FOR	
CL	STOMER	25
	2.8.1 ENTERING SALES POINT DETAILS FOR A CUSTOMER	25
2.9	MAINTAINING ADDITIONAL INFORMATION OF CUSTOMER	29
3	MASTER DEFINITIONS FOR SALES SETUP	30
3.1	DEFINING CATEGORY MASTER	31
•	3.1.1 MAINTAINING CATEGORY CODES	
3.2	2 DEFINING CUSTOMER PAYMENT TERMS	32
3.	B IDENTIFYING DELIVERY AREA	33
4	SALES TAX RULES SETUP	34
4.:	DEFINING TAX, CHARGE AND DISCOUNTS	35
4.	2 MANAGING SALES TAX RULES	36
5	PART PRICING SETUP	37
E ·		20
э.	5.1.1 SETTING OPTIONS FOR PART PRICEUST	סב גע
	5.1.2 CREATING DART PRICEUST	ەد مد
	STEL CREATING FART INCLUST	50

contents

5.2	2 ACT	IVATING OR INACTIVATING PART PRICELIST	44
	5.2.1	ACTIVATING OR INACTIVATING PART PRICELIST	44
5.3	B MO	DIFYING / REVISING PART PRICELIST	45
6	SERV	/ICE PRICING SETUP	47
6.:	L PRE	PARING PRICELIST FOR SERVICE SALES	48
	6.1.1	SETTING OPTIONS FOR SERVICE PRICELIST	48
	6.1.2	CREATING SERVICE PRICELIST	48
	6.1.3	RECORDING ROSTER CODE DETAILS	51
	6.1.4	RECORDING NON-BILLABLE ELEMENT DETAILS IN THE	
	SERVIO	CE PRICELIST	52
6.2	2 ACT	IVATING OR INACTIVATING PRICELIST FOR SERVICE SALES	55
	6.2.1	ACTIVATING OR INACTIVATING SERVICE PRICELIST	55
6.3	в мо	DIFYING / REVISING PRICELIST FOR SERVICE SALES	56
7	SALE	E CONTRACT - SERVICES	58
7.:	L CRE	ATING A CUSTOMER CONTRACT	59
	7.1.1	CREATING AN ENTITY FOR CUSTOMER CONTRACT	59
	7.1.2	DEFINING / MODIFYING THE ATTRIBUTES OF AN ENTITY FOR	
	CUSTC	MER CONTRACT	59
	7.1.3	CREATING NUMBERING TYPE FOR A CONTRACT	60
	7.1.4	MAPPING NUMBERING TYPE FOR CUSTOMER CONTRACT	
	CREAT	ION	61
	7.1.5	MODIFYING NUMBERING TYPE FOR CONTRACTS	61
	7.1.6	CREATING / MODIFYING CUSTOMER CONTRACT	61
	7.1.7	APPROVING CUSTOMER CONTRACT	68
	7.1.8	MAINTAINING OBJECT REFERENCE DATES	69
	7.1.9	SETTING PARAMETERS FOR TASK-BILLING ELEMENT	
	MAPP	ING	69
	7.1.10	TASK-BILLING ELEMENT MAPPING	70
In	dex		71

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.

\star	📱 Set Sales Process Parameters 🗐 🕫 🛱 🖨 🤤 🗧 🗋 🗖											
-	Select	Par	ameter Details									
			Display Parameters for All	T								
-	Process Parameter List											
	(4 4 1-8/55) >> + ロゆむすす。								Ŧ			Q
	#		Parameter for	Process Parameter	Permitted Values	Value	Value Selected					
	1		Customer Order – Services	Allow manual update of 'Warranty Resolution'	Specify "0" for "Yes" and "1" for "No"	0	Yes					
	2		Service Sale Billing	Date identification for Service Invoice	Specify "0" for Shipment Date and "1" for	0						
	3		Customer Order – Services	Exchange Rate Type for Sales	Specify a valid Exchange Rate Type defined in	~BR~	Buying Rate					
	4		Customer Order – Services	Auto-approval of Customer Order on	Specify "0" for "Required" and "1" for "Not	1	Not Required					
	5		Customer Order – Services	Inherit Taxes only in Commercial Invoice	Specify "0" for "Yes" and "1" for "No"	0	Yes					
	6		Service Sale Quote	Modification to Quote Values in Invoice	Specify "0" for "Allowed" and "1" for "Not	1	Not Allowed					
	7		Customer Order – Services	Status of CO auto generated based on General	Specify "0" for "Fresh", "1" for "Confirmed" and	2	Approved					
	8		Customer Order – Services	Status of auto-generated Customer Orders	Specify "0" for "Fresh", "1" for "Confirmed"	2	Approved					
	Set Process Parameters											
			Created	i by			Created Date					
			Last Modified	by DMUSER		Last	Modified Date 03-21-2016					

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 dropdown 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.

10 | Sales Setup

★ 🗎 Create Customer Record				≭ 帚 ⊄ ♀ ເ⊽ [
Customer Details							
Customer #			Reference Status	Under Creation 💌			
Customer Name			Name as in Report				
Parent Customer Code 👂	Enter the m	anufacturer	Supplier # 👂				
SPEC 2000 Code			SITA / ARINC				
Operator #	code, such a	as CAUL #, NOCIVI	Multiple Operators?				
Registration Date	31-03-2017 #, given by a	an external	Engagement Type	On Request			
User Name 👂	regulatory a	authority	Numbering Type	cust			
Customer Category		,	Prospect #	Enter a code that identifies			
- Trade Regulatory Compliance				Effect a code that identifies			
Last Reviewed Date	1		Valid Till Date	the customer when using the			
Copy Details				SITA / ARINC mode of			
Customer # 👂			Sales Point	RAMC			
	E All	Sales Point Information		communication			
	Main Customer Information	Address ID Information					
Copy Options	Payment Receipt Information	Commercial Information					
	Default Bill To / Ship To Information	TCD Details					
- Address Information							
Address Line 1			Address Line 2				
Address Line 3			City				
Zip Code			State				
ISO Country #			Phone				
Mobile			Fax				
E-Mail			URL				
- Additional Details							
Nature Of Customer	External 💌		BU	V			
Company Code	•		Partner ID				
				Auto Gen. CO against Intercompany RO			
Nature of Relationship	Part Sale Service Sale						
	Component Loan Component E	Exchange					
Commercial Information							
Credit Checking At	Customer		Customer Account Group 👂				
•• • • • • • • • • • • • • • •	O G T T						
# Address ID Address Line 1	Address Line 2	Address Li	ne 3 City	Zip Code			
1							
4				P			
Document Attachment Details							
U							
	File Name 👂	View File		Customer Logo			
				-			
			Click this link to add				
Ustomer Remarks			additional info for the				
Remarks			customer				
		Create Oustomer	Castonici				
Edit Payment Receipt Details	Edit Commercial Details	Edit Sales Point De	etails 🗸	Manage Additional Options			
Edit Customer Part Master List	Edit Customer Tax & Charges Information	Edit Customer Add	litional Information	Maintain Entity Level Identification Ref.			

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.

ramo

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** dropdown 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.

*		Edit Payment R	eceipt Info	ormation							≓ ←	?	lo K
		terrer Deteile							Date Format mm-dd-yyyy				-
	Cus	tomer Details	(Customer # Customer Name	CUS-NTXN-TLXN CUS-NTXN-TLXN			Reference Status Created Al	Active RAMCOOU				
	TOW	information		VAT Class Euro VAT ID	v		This group box is applicable	VAT Category Disallowance %					
			Company's B C	Bank Account No Customer's Bank	0001-501529-003		if the payment receipt type is "Bank" "ESR"	Receipt Mode Customer's Bank Account No.	Cash 💌				
	– Preferred Receipt Type – – Bank ESR Details –	Customer's	PTT Account No	Bank ESR		PTT ESR							
	Ban	k ESR Details	Bank	Bank # Participation ID		•	This group box is	ESR Type	ESR 💌				
	- PTT ESR Details		PTT # PTT Participation IE				applicable if the payment receipt type is "PTT ESR"	ESR Type	ESR 💌				
		And Specific Bank De							000				0
44	4	1 - 1 / 1 > >>	+ - 0	% ♀ ♀ Ţ	T _X	Bank #	ISV Contract ID	Contract Reference	ulu Ali	•	_		þ
1	1	Lsv	*	Yes	*	0001-501529-003	•	conduct net created					
2	1	Lsv	~	Yes	*		*						
		4											Þ
							Edit Details						_
-	Rec	ord Statistics											
				Created by	DMUSER			Created Date	11-24-2015				
			L	ast Modified by.				Last Modified Date					

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.*

Comme The Part Price List and Service Price List	Date Format yyyy/mm/dd
sections currently are used for warranty	Currency USD 💌
pricing if the customer is a warranty	Pay Term 👂 N030D000_00.0
provider	Dunning Required No 💌
- Price List Information - Part Sale	
Dart Drice Life HM-DDI	
-Price List Information - Service Sale	
Service Price List# P	Part Price List # P
- Invoice Information	
Collector #	Send Statement No 💌
Statement Interval Days	
Credit Check Action Do Not Check	Credit Currency
Single Order Limit	Total Order Limit
Receivable Grace Days	Discount Grace Days
Residual Writeoff % -91.000	Residual Writeoff Amount
-General Information	
Company Identification Reference	Identification No.
D&B Code No.	D&B Rating
SIC Code	ISO Code
Market	Industry
Region	Segment COM 🔻
Sub Segment	
Automatically send Inv. Info on Authorization	Emplato a
	Email ID 2

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.
- 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*

*	D	Manage Additional Options					74			⊢ ?	lo P
	Custor	Customer #	Customer Name	Customer Category							
	Category Customer Part Usage										
-	Param				1 X4 II	HE III AI		Ŧ			Q
#		Category	Parameter	Permitted Values	Value	Error Message			Crea	ted by	
1		Customer Part Usage	Usage of other Customer stocks	Enter $\ '0' \ for \ 'Allowed'$, $\ '1' \ for \ 'Not \ Allowed'$.							
2		Customer Part Usage	Default Stock Status for Customer Stock Replenishment	Enter a valid stock status of Ownership							
3		Customer Part Usage	Default Stock Status for Customer Stock Replenishment	Enter a valid stock status of Ownership							
4		Customer Part Usage	Default Stock Status for Customer Stock Replenishment	Enter a valid stock status of Ownership							
5		Customer Part Usage	Default Stock Status for Customer Stock Replenishment	Enter a valid stock status of Ownership							
6											
					_						
		`	Sa	ve							

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.*

	Edit Part Supplied by Customer				I		+ 3	¢ K				
-	Customer Details											
	Customer # C	CUS-NTXN-TLXN		Customer Name CUS-NTXN-TLXN								
	Restriction Type Include 💌											
	Spare Part Details											
44		T _x				Ŧ		Q				
#	Part # P Mfr. P	Part # 👂 Mfr. # 👂	Part Description									
1	0-0050845-2:T0000 0-005	50845-2 111	SLEEVED TERMINAL									
2												
-												
	Edit Part Details											
-												

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*

Maintain Customer TCD Mapping			ョュ⋴♀←	? 🗔
Customer Details				
Customer # CUS-NTXN-TLXN		Customer Name CUS-NTXN-TLXN	i	
TCD Details Statutory Tax Default Details Customer Tax Registration Details				
Delivery Details Delivery Area BRITISH COLUMBIA	Get Details	Applicable on Resources	T	
				-
$((1 + 1)/1) \rightarrow ((1 + 1)/2) \rightarrow $			▼	Q
# TCD # P TCD Description	TCD Variant #	TCD Variant Description	TCD Type	
Derivery Charges-01-Notional	DC-01	Delivery Charges - 01	Charge	
4				Þ
	Maintain Tax & Charges			

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.*

*	D	Manage Restricted Sto	oc k	Status					73			+	? [¢ K
-	Custo	mer Info												
	Stock	Status Info	cus	1-000022-2015	Customer Name AIR INDIA			Customer Category						
											•			Q
=		Stock Status		Description	Valuated ?	Defaulted ?	Notes							
1		Customer Purchases	*	Customer Purchases	No 🔨	V								
2		Cobham-Owned	~	Cobham Owned stock status	No									
3		Rented	×	Rented to a 3rd Party		10								
4		customer-new	*		Indicates whether st	ock can								
					be valuated									
				L										
	Save													

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.*



*	D	Manage Restricted Sto	ock	Status					7\$	5	₽ ·	€ 3		K
	Custoi Stock	Customer #	cus	T-000022-2015	Customer Name AIR INDIA			Customer Category						
44	4	1 - 3 / 3 > >> + -	Ø	⊬ Τ Τ _x						Ŧ				Q
#		Stock Status		Description	Valuated ?	Defaulted ?	Notes							
1		Customer Purchases	*	Customer Purchases	No 🔨	V								
2		Cobham-Owned	~	Cobham Owned stock status	No									
3		Rented	*	Rented to a 3rd Party		10								
4		customer-new	*		Indicates whether sto	ock can								
					be valuated									
	Save													

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.*

D	Crea	ate Customer Gro	pup	i ti		⇒ ←	?	0 1
-	Custo	omer Group Details —						_
			Controlled Group Yes Group Type Code Report	Group Tune Darr				
			Customer Group # G1	Customer Group Desc. Customer Group				
-	Custo	omer Details						
44	4	1 -1/1 > >>	+ - 0 + 0 0 T T		-			Q
#		Customer # 🔎	Customer Name					
1	0	1090000	Customer 3					
2	E							
	Rema	arks						-
	RCIII.		Pomarke					
			TCHIGINS					_
				Create Customer Group				
_								-

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.*

* [•	Select Customer					= x		₽	+	? 🛛	10
5	eard	h Criteria							_			
			Customer #			Customer Name						
			Reference Status Active	•		Operational Status Ad	tive 🔻					
		Pare	ent Customer Code			Supplier #						
		Custo	mer Account Group			Operator #						
			Address			Delivery Area #						
					Search							
	earc	h Results			outen							
44	4	1 - 10 / 221 🕨 🗰 🝸	T _x				All	Ŧ			,c	>
#		Customer #	Customer Name		Customer Account Group	Address				Oper	ator #	
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	Click this work how to a to						
9		CUSTOMER LTXN YES	CUSTOMER-LTXN-YES		TRADE	Click this pushbutton to						
10		AC000025-2015	SM-CUST-1		TRADE	activate the customer						
		4									Þ	
					Activate Custo	ner						
Edit Pa	aymen	nt Receipt Details		Edit Comm	ercial Details	Edit Sales Point Details						

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.

* E	Ma	intain Order A	utomation rules for Customer Requests			R	AMCO OU-ramco role 🔻 💢 🖓	e ? 🗔 🗖
- Rule	s Deta	ils						
		Request For Sale: Rules For OIn	s The second sec					
- Rule St	s List -	Auto Generated Orde	ers Confirmed 💌					
	1	- 3/3 🕨 🍽 🚽	▶ ━ □ ≫ ✿ ダ ▼ ४		> h 🛛 🗹 🗠 📽 其	🗭 💷 科 🐕 🗚	Search	Q
#	1	Rule ID	Rule Description	Define Rules	Defined Rules Description	Status	Remarks	
1		1	Rule1	1	Priority = 'A1'	Fresh	~	
2		2	Rule2	1	SLACategory = 'SLA12' AND Reqpurpose = 'INIFT'	Fresh	~	
3		3	wser	1	No Rules defined	Fresh	~	
4							~	
				/				
				Click this id	con to define rules			
					Save			

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 **Control 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.

*	M	aintain Agree	ed	INCO Terms							RAMCO	OU-Ramco	Role 🔻 🔀 🔒		÷	? [5 [
earch	Criteri	а															
		Shipment T	Гуре	Inbound	-	Trading Partner/Tradi	ng Partner # C	ustomer	Q	Ref. Doc.	Type/Ref. Doc. #	Sale Cor	ntract 💌 400	0604-0	M-CLT	r	Q
igreed	INCO	Terms						Search									
	•	1 - 5/9 🕨 🕨	H	- 🗆 🛪 🍸	¥				▶ <u>II</u> 🗟 🖹 🛛 ו	C X # #	010 14 % A	JI	▼ Searc	h			Q
#		Shipment Type	e	Trading Partner	Trading Partner # 🔎	Ref. Doc. Type	Ref. Doc. # 🔎	Ship To Customer #	Ship To Address	Ship To Station	Ship From Custo	omer #	Ship From Address		Ship	From	Stati
1		Inbound	~	Customer 💊	400008	Sale Contract 🗸	400008	=	=	(E 7	400008	=*	123	27	ABC		
2		Inbound	~	Customer 💊	101	Sale Contract 🗸		<u>.</u>	Ξ.	=	400007	EY	Ship to 1	Ē			
3		Inbound	~	Customer	IGD	Sale Contract 🗸		=		=	Click this	link to	sot dofault	<u>=</u>			
4	1	Inbound	~	Customer 💊	2BU	Sale Contract 🗸		<u>.</u>	E	=				⊒₹			
5		Inbound	~	Customer 💊	400016	Sale Contract 🗸	400016-CM-20	10	=	=	Tules for a		у	<u>=</u> *			
		4			1.		1		1				\sim $-$	-			
							Save						Maintain Default Rule	es for 1	INCO t	erms	

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.

laintain Defau	It Rules for INCO Ter	ms							[0	2 ?
Search Cri	iteria			(D T /D-(D #	Table Contract - 1470 5 CC		1000 T				
Rule Defin	itions	Lustomer 400007	Re	r. Doc. Type/Rer. Doc. #	Sale Contract ABLE-CC	INTRACT	INCO Term	UFR V		Get	
+ + Foun	id no rows to display!!!	► ₩ ▼ 7′			٨	<u>III</u> 🗟 🖹 🗶 ×* 🗳		N % All	 Search 		Q
#	Cost Element	Cost Head	TCD Code	Responsibility	Service Sale Type	Part Sale Type	Inclusion	Remarks	Notes		
					Found no rows	Click here to sav	e the				
	4				Save						•

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.

* 8	Ma	anage Price Esca	lations							RAMCO O	U-Ramco Role 💌	* 🖨 🛱 🗲	? 🗔
Price Es	calatio	ns											
00	ontract I	Escalations	O Pricelist Escal	ations									
- Sea	rch Crit	teria											
	Esca	lation Document Sale	Contract	•	Q	Customer #		~	Esc	l. Eff. Date From/To		1001	
		Addl Search					Sea	rch					
		Addit Scarch		•			Jean						
Contrac	t Escal	ations											
		1 - 10/44 🕨 🕨	+ - 🗆 🎖	< 🍸 🏋					× C 🗶 🖡 H	H 💷 科 🚿 🛛 All		 Search 	Q
#		Contract # 🔎	Contract Type	Customer #	Customer Name	Escl. % on all Rates	Escl. % on FPWU	Escl. % on FP Object	Escl. % on FPM	Escl. % on UB	Escl. Eff. From	Escl. Eff. To	E
1		400944-EMC-CFM5	Customer	400944	Customer 66	6.00					2020/Jul/27		Ē
2		TWOSL	Customer	441964	Customer 173	5.00					2020/Jul/30		
3		CNT-PARTS-100	Customer	400007	Customer 8	5.00					2020/Jul/30		
4		GMR1	Customer	400006	Customer 71	7.00					2020/Jul/30		
5		HAECONDTCHI	Customer	400007	Customer 8	8.00					2020/Jul/31		
6		GMR1	Customer	400006	Customer 71		10.00				2020/Sep/03		
7		GMR1	Customer	400006	Customer 71		124,234,234.12				2020/Sep/04		iii N
8		GMR1	Customer	400006	Customer 71	9.93					2020/Sep/05		i N
9		AirPatria	General			10.00					2020/Sep/02		
10		GMR1	Customer	400006	Customer 71		1.00				2020/Sep/02	1 mm 1, 1 1 1 1	Ē
		•	1	1		1	1	1					F
				Update Escalat	tions					Cancel Escalations			

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.

*		Manag	e SLA/Core I	Ret	urn Rules													RAN	1CO OU-Ramco Rol	e 🔻	х	0	*	?	
Searc	Cont	ext —																							_
			Customer #			Q		Sale Contract	t			Q							Sale Type			-			
			Part Based		-	-	Q	Request Based	ł		-			•		Q									
									Search C	riteria															
Stan	lard I	Duratio	Compliance 1	Ferm	15																				
Stan	lard D	uration	details	- Criti	5																				_
		ound no	rows to display!!!	•		77				人血	5 🕅 🖸		Xi (# 1	• 010 14	%	All		▼ S	earch			Q	
#		Tr	ansaction Type		Customer # D	Contract # D	Start Reference Da	End Reference	Date		Part Group		Reque	st Priorif	y	Station	Q	St	andard Duration		UOM		Par	t# 🖌	
1		[]		~			~			~		~			~							~			
		4																						•	
									Save																

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.



Stand	ard D)ura	tion Compliance Ter	ms										
	•		1 - 10/16 🕨 🕨	+ 🗅 % 🗡 🎢			비 시) × C 🗙 🖡 -	H III 14 %	All	Search		Q
#			Transaction Type	Customer # 🔎	Contract # 🔎	Start Reference Da	End Reference Date	Part Group	Request Priority	Station O	Standard Duration	UOM		Part #
1			Part Sale Issue 🗸 🗸			~	~	~	· · · · · ·	•		Hour(s)	~	
2			Adv. Exchange I 🗸	400006		AWB# Generat 🗸	AWB# Generation Date and \checkmark	~	· · · · · · · · · · · · · · · · · · ·	•		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 v	•		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)	~	
			I ■ 1											Þ
							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.
- Select the Compliance Terms tab page in the Manage SLA/Core Return Rules activity in the Customer business component.

		1 - 8/8 🕨 🕨 📲	ΗĆ] 🔀 🍸 🗶				<u>ہ</u>	🛄 ਓ 🖹 🖂 🗎	×* 🗳 🐹 🐺 🗯	10 📢 🞋 🛛 All	 Search 	
#		Transaction Type		Customer # 🔎	Contract # O	Essentiality	Request Catagory	Part Group	Request Purpose	Request Priotity	Guaranteed Complian	Horizon of Evaluation	🗸 Cus
1		Adv. Exchange Issue	~			~	~	~	~	~		Monthly	~
2		Part Sale Issue	~			~	~	~	~	~		Quarterly	~
3	12	Adv. Exchange Issue	~	400006	HAECOADVEX	~	~	~	~	AOG 🗸 🗸		Moving 12 months	 Cust
4		Adv. Exchange Issue	~	400006	HAECOADVEX	~	~	~	~	NRM 🗸		Moving 12 months	 Cust
5		Adv. Exchange Issue	~	400944	400944-HM-2010	~	~	~	~	AOG 🗸 🗸		Monthly	Cust
6		Adv. Exchange Issue	~	400944	400944-HM-2010	~	~	~	~	NRM 🗸		Monthly	Cust
7	1	Adv. Exchange Issue	~		HAECOGM	~	~	~	~	FK43 🗸		Quarterly	~
8		Adv. Exchange Issue	~		HAECOGM	~	~	~	~	нв68 🗸		Quarterly	~
9			~			~	~	~	~	~			~
		4											
9		4	~			Ý	~	~	~	~			,

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.
- 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.



* Edit Sales Point Information								7 8 9 10 >	××⊕↓	€ ?
								Date Format yyy	y/mm/dd	
Customer Details										
Customer	# 13869						Reference Status Ac	tive		
Customer Nar	ne SA					0	perational Status Ac	tive 💌		
Created	at RAMCOOU						Restricted ? No			
Copy Details								Soloct the h	uporlinkod valuo	to
Sales Po	int 💌							Sciece the fi	s for a triation of	10
	L All					Sales Poin	t Information	view details	of restrictions	
Copy Option:	E Default Bill To / Shi	ip To Information						defined.		
Invoice Information										
Automatic Invoice Authorizati	on No 👻 En	ter the carri	ier pret	ferred by			Freight Billable	Select the freid	iht term	
Eligibility For Reba	te No 🔻 the	e customer	for the	shipment				policable to t	ha customor	
Tax Exem	of	aoods				Tax Exem	pt Certificate No.		ne customer	
Invoice Applical	ole No 🔻	90000				No.	of Invoice Copies	7 /		
Shipping Information		7							100	
Shipping Po	int RAMCOOU 🔻						Shipping Method As	p fouting guide	•	
Preferred Carr	er	•				-	Freight Term			
Partsnipment Allow	ed Yes 🔻					Trans	Shipment Allowed Ye	s 🔻		
Packaging Co	de 🗛						Shipping for the			
	New cont	act categor	ies, suo	ch as						
Bill to	Cust. Serv	ice Rep. car	n be cr	eated			Shin to ID 12	24 -		
Order From		ernal Contac	t Infor	mation			0110 10 10	51 0		
Internal Contact Information	multiling	inter contac		indition						
					A III	B B C B × 5			▼ Search	C
# Contact Category Desi	rintion	Employee #	Q	Employee Name		Position Title	Job Title	Department	Remarks	
1 CSR Cust.	Service Rep.	00000656		KANE, ERIC						
2										
4										
				Edit Details						
							21.010			
Edit Contact Persons Maintain Entity Level Identification Ref.	Edit Default Ship/Bill To	Customer		Maintair	Carrier Acc	ount Information for Supplie	r/Customer Ma	nage Additional Option		
number analy acted auchunication real										
Record Statistics										

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*.

*	D	Edit Contact Persons						III 74	Ē	₽ ◆	?	Co E
	usto	mer Details										
		Custome	r # ACI1000001-2015			Customer Name Customer	r 211					
		Address	Get D	atails								
	ionta	ct Person Details										
44	4	1-1/1 > >> + = 🗇 🗲 🕏	T Tx		人业				Ŧ			Q
#		Name	Designation	Department	Ad	ddress1	Address2				A	ddre
1		MIKE	POS1	3220	22	200 NW 84th Avenue, Miami-33122, FL, US						
2												
		4										•
												_
				Edit Contact Persons								

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.

D	Edi	t Default Ship/Bil	l To Customer								7\$ E		+	?	[0 K
-	Custo	omer Details													
	Addit	ional Details	Customer # AC	1000001-2015 000001-2015				Default Bill	to Customer IV ACC	tomer 211 000001-2015					
44	4	1 - 1 / 1 > >>	+ - 0 % 0 0 T T							All		Ŧ			Q
#		Customer # 🔎	Customer Name	Bi	ll/Ship/Both		Address1		Address2		Addr	ess3			
1	E	101		Bi	ll to Customer	*									
2	E	1		Bi	ll to Customer	*									
		¢													Þ
						Edit D	etails								

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.

*	D)	Edit O	ustomer	Additional Information							= _;	F	¢ ↓	. ?	lo K
	-		-							Date Format mm	i-dd-yyyy				
	-Custo	mer Det	aus	Customer # ACI1 Customer Name Custo	000001-2015 omer 211			Refe	erence Status Activ Created At RAM	e 2000					
-	-Sean	t h Criteri Cat	ia egory	v			Attribute 💌 🔻				Status Activ	e	•		
	- Addii	ional Inf	ormation —				Search								
4	4	1 - 1	/1 > >>	+ - 0 % T T,					84 H H H	All	-	•			Q
#		Categ	ory	Category Description	Attribute		Attribute Description	Value		Notes	Status	,	Creat	ed by	
1	E	Fixed	*	Fixed Wing	1-For	~	1-Foreign	100			Active	~	DMUS	ER	
2	E		*			~					Active				
		4					Save Additional Info.								•
	-Reco	rd Statis	tics —	Created By DMUS Last Modified By DMUS	SER SER			Last N	Created Date 04-2 Nodified Date	3-2016 16:07:45					

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 userdefined 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.*

	D	м	laintain C	atego	ory Code	es													7\$		+	?	6
-	Sele	ct En	itity																				
					Entity	Common		T															
-	Sear	ch Ci	riteria																				
				Cate	gory Type	Customer Grou	р Тур	e 🔻		Catego	ry Code							Category Desc.					
					Status			•			Search												
-	Cate	gory	Code Detai	ls						_													
	44	4	1 - 1 / 1	Þ	+ t	T Tx								人主	U X Z E	1 X4		II II		Ŧ		J	p
	#		Entity		Categor	гу Туре		Category Code	Description		Status		Created by		Created Date	Last	Modified by	Last Modified Date					
	1		Common	~	Custome	r Group Type	~	DTS	Direct Sales Income		Active	~	DMUSER	0	4-05-2013	DMU	SER	01-31-2014					
	2		Common	~			~				Active	*											
							_																
			4																				•
											Save	•											

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.

	1 140	Document Type Pa	rt Sale Invoice	•								o oo kameo			
Sea	rch Crit	Customer Group	The area who serviced com delivered	ere the aponents are		Invoice Category Part/Service Group Delivery Area	rch		•	From & Shipp	To T Airc ing W	ax Region raft Model /arehouse		V]
		1 · 10/14 • • + •	- 🗆 🛪 🕇 🏏					人血目図	2 🖹 ×		All	1	-	Search	Q
#		Customer Group O	Invoice Category	Shipping Warehouse	Q	Aircraft Model	Q	Delivery Area	Q	Part/Service Group		Station	Q	From Tax Region	
1	83	Tax								HSN CODE	~			Andhra Pradesh	
2		Tax	<u> </u>							HSN CODE	~			Andhra Pradesh	
	10	Tax				and a second				HSN CODE	~			Andhra Pradesh	
		Tax		The warehouse		which the		Quebec		HSN CODE V					
	13	Tax		components a	re sh	nipped for		Alberta							
5	10	Tax		which you wis	dofino		Manitoba		HSN CODE 🗸						
7	13	Tax		which you wis		uenne		Alberta		HSN CODE	~				
3	8	Tax		/				Saskatchewan		HSN CODE	~				
	13	Tax		·				British Columbia		HSN CODE	~				
10		Tax		•				Newfndind and lab	0	HSN CODE	~				
		4													ſ

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*.

★ 🗎 Set Options		≣ ≭ ē ⊄ ? ⊡ ⊠
	Date Format yyyy-dd-	mm
Uption Setting Information	Activation of Part Pricelist Not Required Set the approval of the Part Pricelist Not Required Part Pricelist here	e
Record Statistics	Last Modified by DMUSER Last Modified Date 2015-06	09

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.

ramco

★ 🗎 Manage Part Pricelist				▤≭骨⊄수?ቬ◙
Julantifica Dataile			Date Format	yyyy-dd-mm
Pricelist # / Rev. # Effective Date from Effective from (Existing)	400007-HM-PPL /0 2014-01-10 m 2014-01-10		Description Line Maint Effective Date to 2016-29-04 Status Draft	enance
Usage Copy from Other Pricing Details	👿 Part Sale 📄 Service Sale			
Pricelist Category OEM # Ø Ref. Catalogue ID Other Currencies Price Factor Details ? Remarks	Not Applicable V Required V	Specify the category to which the part price list belongs	Pricelist Type Regular OEM Name Currency CAD Pricing Defined Factor Details at Document	v Ievel v
Pricing Profile Factored Pricing Ref. Pricelist Pr Pricing Element Part Price	iority Price Factor Details Direc	t Pricing Rule Based	Rule	
Pricing Attribute Pricing Attribute Pricing Attribute Attribute Attribute	e Applicable? Yes	Enter the additional detail pertaining to the part price	1 22 II II Ali	[Q] ▼
2 Replacement Type Part Attribute 3 Part Type Part Attribute 4 Part Group Part Attribute 5 Part Classification Part Attribute	Yes Yes Yes Yes			
6 Condition Stock Attribut 7 Status Stock Attribut 4	e Yes e Yes			•
Comments				
Save		Confirm		Cancel
Upload Documents	Activate / Inactiva	ate Part Pricelist		
View Associated Doc. Attachments	View Part Pricelis	t		
Created by Last Modified by Confirmed by Activated / Inactivated by Source	The OU the source of p	at is the part pricelist	Created Date 2016-29-04 Last Modified Date Confirmed Date Activated / Inactivated Date Owner	The OU that is the owner of part pricelist

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 <u>Pricing Profile</u> 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 **<u>Ref. Pricelist Priority</u>** 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.

41 | Sales Setup

|--|

	Pricin	g P	rofile Factored Pricing Ref. P	ricelist Priority Slab Definition	s Direct	t Pricing		
-	– Pric	cing	Pricing Element	Flat Exchange Fee	-	Rule Based	Rule	
I	• •		1 -7/7 🕨 🕨 🕇 🗇 🖏	Handling Fee Part Price				Q
#			Pricing Attribute	Buy Back	plicable?	Check this box if pricing is		
1			LLP	Exch. Fey with Repair		based on customized rules	Customized rules	
2			Replacement Type	Part	No			
3			Part Type	The pricing element for				
4			Part Group	which attributes can be	act			
5			Part Classification	which attributes can be	set			
6			Condition	Stock Attribute	NO			
7			Stock Status	Stock Attribute	Yes			
			4					
-								
			C	Comments				

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.

Pric	ting Pi	Factored P	cing Re	t. Pricelist Priority Slab Defin	itions	Direct Pricing	or Price	1		
		Pricing C	iteria Max A			Multiple Criteria Match Pick High	er Price V			
44	4	1 -1/1 ▶ ₩	+ - 0			A		1 x C I = III	ti 🕺 All	•
#		Line # Pricing	Element	Part Type	Main (Core - Part Group	Condition	Stock Status	Factored on	Ref. Catalogue ID
1		1 Flat Ex	har Spec	ify the pricing criteria for t	he	*	*	*	Ref. Catalogue 🗸 🗸	OEM
2	6		pricir	ng elements		•	*	•	•	
l						J				
ĺ										

Figure 5.4 Defining factor at pricing element level

- 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.
- 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*.



Pri	cing P	rofile	Factored Pricing	Ref. Pricelist Priority	Slab Definitions	Direct Pricing				
			Primary Pricel	list Airline	-					
44	4	1 - 1	/1 > >> +				人 血	5 x 2 8 × •	🗏 🗏 💷 🖬 🗚 📈 🗛	-
#		Altern	nate Pricelist	Priority #						
1		Aveos	5	*				-	1	
2				~			Click here to save the priority details			
							Save Priority			

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.

Pric	ing Pr	ofile Factored Pricing Ref. Priceli	ist Priority Max Price - Appl. Pricelists	Slab De	finitions Direct Pricing			
		Pricing Element	-		Line Detail		Pricing Criteria Max. Base Price	•
	•	1 -4/4 🕨 🗰 🕂 🗖 😽 🎙	r T.		人上回文区首型。	III + ×	All	
#		Pricing Element	Line Detail		OEM / Ref. Catalogue ID	Price Factor	Select the Pricing	
1		Part Price 🗸	1 / New / Accepted	~	Airline	*	Criteria	0.070
2		Part Price 🗸	1 / New / Accepted	~	OEM	*		0.10
3		Part Price 🗸	2	~	Aveos	*		0.09
4		Part Price 🗸	2	~	PPL1	*		0.09
5		~		~		~		

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.

Pricing Profile F	actored Pricing Ref. Price	elist Priority Sla	ab Definitions D	irect Pricing					
•• • [No records	to display] 🕨 🕨 + –		T Tx		А		All	Ŧ	Q
# 🗉 Line Ref.	Line # Slab	b Ref.	Base Value From		Base Value To	Base Adj. Factor	Price Factor	Pricing Notes	
1 🖸 Factored	Pricing 🗸 🗸	*							
	The Pricing L against which definition is s	ine # h slab pecified							
	0	omments							

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 for pricing 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".

Pricing Profile	Factored Pricing	Ref. Pricelist Priority	Slab Definitions	Direct Pricing								
Search Crite	eria											
_		Part #				P	1fr. Part # / Mfr. #					
		Vendor #					Addl. Search	1	•		•	
		Valid from					Valid to					
		Show Active Records]					Search				
•• • [No rec	ords to display] 🕨	* + - 0 * 4	0 T T.				2 🗎 🍽 🔮		14 📈	All		<u>م</u> ۲
# 🗉 Pricin	ng Element	Part #	Serial #	иом Р	Condition	Stock Status	Curren	cy	Price	1	Part Description	
1 🗉 Part I	Price	*		\wedge	~		🗸 USD	*				
			The unit of measurem parts	of nent of	Select th condition part	ne n of the						
		Comments										

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.

Pricing Profile Factored Pricing	Ref. Pricelist Priority Price Factor	Details Direct Pricing					
	Pricing Element Part Price	T					
Breakupdetails	N						
(i) (i) 1 - 1 / 1 → → + -	-0***				😑 💷 🛛 All	•	Q
# 🖾 Factor Type	Factor Value		Applied On	Effective Price factor			
1 🖾 Handling Fee			Total value	*			
2				×			
	Enter the pricing elen	nent for					
	which price is being a	lefined					
	after considering the						

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".

*	0	Activate / Inactivate Par	t Pricelist					= 자 = 다	← ? [ō
	ieard	h Criteria				ſ	Date Format yyyy-dd-mm			
			Part Pricelist #				Description			
		p	ricelist Category			P	ricelist Type	v		
			Currency	v			Status			
			Valid from	1.00			Valid to	1		
			OFM #				OFM Name			
		Pa	OLIT?				Part Group			-
			Click here to	o modify the	Search					
	ieard	h Results	details of pa	art pricelist before						
44	4	1 - 10 / 172 🕨 🕨 🗕 🦯	activating	ripactivating			III ₩ ₩ MI	•	5	o
#		Part Pricelist #	activating c	or inactivating	Status	Pricelist Category	Pricelist Type	OEM #	OEM Nai	ne
1		400006-HM-PPL	2	Air Canada neavy Maintenance	Active		Regular			
2		400007-EM-2012-ONWING-PPL	3	Air Canada ON Wing Engine-APU PPL CF34-8	Active		Regular			
3		400007EM20125A5BPPL	0	AC Eng Mtce CFM56 2012 Parts Price List	Active		Regular			
4		400007EM2012APUPPL	0	AC A320 APU FHC PPL 2012	Active		Regular			
5		400007EM2012CF34PPL	2	AC CF34 Eng T&M PPL 2012	Active		Regular			
6		400007EM2012CFM565ABPPL	3	Ac CFM56 Eng PPL 2012 FIX for Moc3	Active		Regular			
7		400007EM2012PpartRDMPPL	0	AC Pice Part Random EM 2012 T&M PPL	Active		Regular			
8		400016-CM-2010-PPL	3	Aircraft component parts or other items	Active		Regular			
9		400164-EMC-CFM56-2-3-PPL	0	Aeroturbine EMC CFM56 PPL	Active		Regular			
10		400164-EMC-CFM56-5B-PPL	0	Aeroturbine EMC CFM56 PPL	Active		Regular			
		4							1	
			Comments							
		Activate			Inactivate			Return		-

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.*

k	D :	Select Part Pricelist								4 6	+	? [ō
	earch	Criteria					Date Form	at yyyy-dd-mm					
_			Part Pricelist #				Descriptio	n					
		Pr	ricelist Category	The p	art in the p	orice list for	Pricelist Tv	e					
			Currency	which	the price	list details	Stati	IS V					
			Valid from			a d	Valid	:0	İ				
			OFM #	have t	to be revis	ea	OFM Nan	e					
		Par	t # / Mfr. Part #				Part Grou	in l					
					Search		1010 0101						
s	earch	Results			ocarch								
11	(1 - 10 / 171 > >> = 🔻	T			Ja In				T	 _	6	ź
i.		Part Pricelist #	Revision #	Description	Status	Pricelist Category		Pricelist Type	OE	M#	(DEM Nan	n
		400006-HM-PPL	2	Air Canada Heavy Maintenance	Active			Regular					
		400007-EM-2012-ONWING-PPL	3	Air Canada ON Wing Engine-APU PPL CF34-8	Active			Regular					
		400007EM20125A5BPPL	0	AC Eng Mtce CFM56 2012 Parts Price List	Active			Regular					
		400007EM2012APUPPL	0	AC A320 APU FHC PPL 2012	Active			Regular					
		400007EM2012CF34PPL	2	AC CF34 Eng T&M PPL 2012	Active			Regular					
		400007EM2012CFM565ABPPL	3	Ac CFM56 Eng PPL 2012 FIX for Moc3	Active			Regular					
		400007EM2012PpartRDMPPL	0	AC Pice Part Random EM 2012 T&M PPL	Active			Regular					
		400016-CM-2010-PPL	3	Aircraft component parts or other items	Active			Regular					
		400164-EMC-CFM56-2-3-PPL	0	Aeroturbine EMC CFM56 PPL	Active			Regular					
)		400164-EMC-CFM56-5B-PPL	0	Aeroturbine EMC CFM56 PPL	Active			Regular					
		4										•	ļ
			Community (
			Comments										
			Confi	m				Cancel					
			conn										

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.



1 4 1 2 3 4 5 b 1 / 171	
Date Format vvv-dd	mm
Identifier Details	
Pricelist # / Rev.# 400006-HM-PPL /2 Description Air Canada Heavy Ma	aintenance
Effective Date from 2006-01-10 🛗 Effective Date to 2013-01-10	
Effective from (Existing) 2006-01-10 Status Active	
Usage 🔄 Part Sale 📝 Service Sale	
😢 Copy from	
Other Pricing Details	
Pricelist Category Pricelist Type Regular	T
OEM ≠ ₽ OEM Name	
Ref. Catalogue ID Currency CAD	•
Other Currencies Not Applicable 🔻 Pricing Defined Factored	
Price Factor Details ? Not Required 🔽	
Remarks 🛛 Air Canada Heavy Maintenance Dummy Parts Price 💠	
Pricing Profile Factored Pricing Ref. Pricelist Priority Direct Pricing	
Pricing Element Part Price 💌 🔄 Rule Based Rule	
Pricing Attributes	
((↓ 1 - 7/7))) + Ø Ø Ø T T. > ■ ■ Ø X Ø B Ø T T.	Q v
# Pricing Attribute Attribute Type Applicable?	
1 LLP Part Attribute Yes	
2 Replacement Type Part Attribute Yes	
3 Part Type Part Attribute Yes	
4 Part Group Part Attribute Yes	
5 Part Classification Part Attribute Yes	
6 Condition Stock Attribute Yes	
7 Status Stock Attribute Yes	
4	۱.
Comments	
Click here to confirm the	
Save Confirm revised Part Pricelist Details	ncel
Upload Documents Activate / Inactivate Part Pricelist	
View Associated Doc. Attachments View Part Pricelist	
Record Statistics	
Created by SCHELLAMUTHU Created Date 2011-11-11	
Last Modified by DMUSER Last Modified Date 2013-07-10	
Confirmed by DMUSER Confirmed Date 2012-30-06	
Activated / Inactivated by DMUSER Activated / Inactivated Date 2012-30-06	
Source Owner	

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*.

★ 🗎 Set Options			1	≠ ≣	+ ?	Ø K
Option Setting Details			Date Format yyyy-dd-mm			
_	Activation of Service Pricelist Price factor in Service pricelist ? Price factor detail definitions in Service Pricelist Set O	Required	Specify set the approval of the part price list			
-Record Statistics	Modified By DMUSER		Modified Date 2014-09-05			

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.*

ramco

Manage Service Pricelist						* = = +	? 🗔 🖪
Jelect here to expand Cop From group box to copy	y HM-SPL /o			Date Format Description	dd/mm/yyyy Service pricelist 2015		
details from a service price	list			Effective Date to Status	30/11/2015	Ē	
Part Pricelist # P Effective til Date	12333			Description	1		
Copy from Other Pricing Details Pricelist Category Currency Price Factor Details Remarks	Specify t CAD V Required V	he category to e service price list		Other Currencies Factor Details at	Not Applicable Document level	▼ ▼	
Resource Pricing Additional Task Level Charges	Price Factor Details Differential	Rates					
$44 + 1 - 1/1 \rightarrow 33 + - 12 \neq 2$		I # 0 Wark Contar # 0		Bopair Classification	All	Time Attendance Type	Q
1 Equipment 123	1212	100-00	9X		C1/Split v	Normal	~
2 🗉 🗸				· ·	*		*
<							>
External Repair Pricing Details							
Pricing Basis Pricing Factor	Invoice Value 🔻			Applied on	Basic Value 🗙 💌		
Comments				Ş			
Save		Confirm			Can	cel	
Edit Roster Code Details Activate / Inactivate Service Pricelist	Edit Non-Billable	Elements		Upload Documents			
View Associated Doc. Attachments	View Service Price	telist					
Record Statistics							
Created by				Created Date			
Last Modified by				Last Modified Date			
Confirmed by Activated / Tractivated by				Contirmed Date			
Source				Owner			

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.

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.

				ferential Rates	k Level Charges Di	e Pricing Additional Tas	source	Re
Q V	HI III AII	IX 🖂 🖬 💌 🖷 🖛	1 三 1	T _x		1 - 2 / 2 🕨 🕨 + -	•	44
lassification	Task Type	Work Center # 🔎	Aircraft Model # 🔎	Resource Description	Resource # 🔎	Resource Type		#
	*			AIRCRAFT MECHANIC	01	Skills 🗸 🗸		1
	*					Skills		2
	~			rce for which added or	type of resou ills need to be	The deta		3
►						4		
				e added or	ils need to be	deta		

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".
 - A 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.

F	esourc	e Pricing Addition	al Task Level Charges Differential Rate	25						
44	4	1 - 1 / 1 🕨 🕨	+ - 0 % Q T T,		4		4 🖷 💷 🔺		•	Q
#		Task # 🔎	Description	Charge Code 🔎	Variant #	Pricing Basis	Price	Factor	Price Description	
1	E	046-CFM56-5B 23X	CFM56-5B 72-23-00 FAN FRAME CLEANING	DC	DC	Actuals 🗸				
2	E					*				
		4	Textual description of the task							Þ

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.

 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.

*	D	Edit Roster Code	e Deta	ails												= _;	ē	← 1	?	0 7
	Identi	fier Details									Dat	te & Time F	ormat yyyy	/-dd-mn	ı					
				Service Pricelis	it # 400944-HM-SPL								Description	Air Fr	ance Heavy	v Maintenance				
				Effective Date fr	rom 2010-06-07							Effe	ctive Date to	2022	-05-07					
				Pricelist Categ	jory								Status	Activ	e					
				Curre	ncy EUR															
-	Roste	r Code Options																		_
		- Cada Dataila		Roster Code Ba	asis 💌															
	ROSLE	r Code Details																		
44	4	1 - 1 / 1 > >>	+ -	-0%00	T T _x					<u>></u>	0 x C	₿ xi (All		•		_	Q
#		Roster Code		Element	From Time	To Time	Factor	F	Remarks											
1			*	Working Day 🗸				40.00												_
2			*	*																
																				- 1
							Edit Ro	oster Coo	de Details											
-	Recor	d Statistics																		
				Created	by SCHELLAMUTHU							C	reated Date	2011	-11-11					
				Last Modified	by DMUSER							Last M	odified Date	2016	-02-05					
_																				

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.*

D	Edi	t No	on-Billable I	Element	ts										≣ <i>'</i> ,			+	?	
			D-1-1										Date Form	at yyyy-dd-mm						
	Non-	Billa	ble Tasks	Non-Billa	Pricelist # / Rev. # Effective Date from Pricelist Category Currency ble Parts Non-Bill	400944-HM-SPL 2010-06-07 EUR able Resources	0 Ion-Billable Charges					Eff	Descriptio ective Date 1 State	n Air France Heavy M o 2022-05-07 is Active	laintenance					
	a a	1	1 - 1 / 1			T T				LINE	V C B V	-							0	
	-	5	Task # Q	7	ask Description	L Dx	Related Tasks?		Execution Category		Task Type		Repair C	lassification			Pricina	Notes	~	
1		5	05-GENERAL	G	eneral inspection		Yes	*	A310	~	9X		CID			~	,			
2								*		*			,			*				
			4																Þ	
_					Save								Confirm							
-	Rec	ord S	tatistics																	
					Created by	SCHELLAMUTHU							Created Dat	e 2011-11-11						
					Last Modified by	DMUSER						Last I	Modified Dat	e 2013-07-10						
				Ac	Confirmed by tivated / Inactivated by	CBLONDEAU					Activated	Co d / Ina	onfirmed Dat octivated Dat	e 2011-11-11						
	Rec	ord S	tatistics	Ac	Save Created by Last Modified by Confirmed by tivated / Inactivated by	SCHELLAMUTHU DMUSER CBLONDEAU CBLONDEAU					Activated	Last I Co d / Ina	Confirm Created Dat Modified Dat onfirmed Dat	e 2011-11-11 e 2013-07-10 e e 2011-11-11						

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 <u>Non-Billable Resources</u> 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.

Recording non-billable task details

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

Image: Classification Image: Classification Pricing Notes Image: Classification Task Description Related Tasks? Execution Category Task Type Repair Classification Pricing Notes Image: Classification Task Description Yes A310 Yes ClD Image: Classification Pricing Notes Image: Classification Yes A310 Yes Image: Classification Pricing Notes Image: Classification Yes A310 Yes Image: Classification Pricing Notes Image: Classification Yes A310 Yes Image: Classification Pricing Notes Image: Classification Yes A310 Yes Image: Classification Pricing Notes Image: Classification Yes A310 Yes Image: Classification Pricing Notes Select Yes Yes Image: Classification Yes Image: Classification Yes Select "Yes" Image: Classification Yes Image: Classification Yes Image: Classification Related tasks Test Pricing Notes Image: Classification Image: Classifica	Non-Billable Tasks	Non-Billable Parts Non-Billable Resour	rces Non-Billable Charges						
# Move of ist row [home] Task Description Related Tasks? Execution Category Task Type Repair Classification Pricing Notes 1 05-GENERAL General inspection Yes A310 9X CID V 2 V V V V V V V 3 Select "Yes" or "No" to specify if related tasks are also required to be non-billable description of the V V V V		» + - □ % ¢ ¢ T T,				54 III	😑 010 🛛 All	•	Q
1 OG-GENERAL General inspection Yes A310 Select "Yes" or "No" to specify if related tasks are also required to be non-billable description of the	# Move to first row [Hon	Task Description	Related Tasks?	Execution Category	Task Type		Repair Classification		Pricing Notes
2 Select "Yes" or "No" to specify if related tasks are also required to be non-billable description of the	1 05-GENERAL	General inspection	Yes	✓ A310	✓ ⁹ 9X	~	CID	*	
	2		Select "Yes" of related tasks be non-billab	• "No" to specify if are also required to le description of the	v	*		*	

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.

I	lon-B	illab	le Tasks Non-Bill	lable Parts Non-Bill	able Resources Non-Billa	ble Charges								
4	(1 -1/1 🕨 🕨	+ - 0 % 0 0	T Tx					X1	# # M	All	•	Q
#			Part # 🔎	Mfr. Part # 🔎	Manufacturer # 🔎	Part Type		Part Group	Pricing Notes				Part Description	
1			:35895	:35895	111	Component	*	*					EXPRESS U.S.RATE SH EET	
2							~	~						
					_									
						The true of		and the state						
						The type of	л р	art that is						
						required t	o b	e non-billable	2					
					L									
			1011											
	G	et P	art Details											

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.



Nor	-Billabl	le Tasks Non-Billable Parts Non-Bil	llable Resources	Non-Billable Charges				
44	4	1 -1/1 🕨 🗰 🛨 🗖 🗲 🕸 🕯	a 🔳 🔨				T	Q
#		Resource Type	Resource # 🔎	Aircraft Model # 🔎	Work Center # 🔎	Pricing Notes		
1		Skills 🗸 🗸	01	101-00	100-00			
2		· · ·						
		Ensure that the non-bi such as either Resourc Resource Type is speci	illable details e # or fied					

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 nonbillable.
- 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.

No	n-Billa	ble Tasks Non-Billable Parts	Non-Billable Resources Nor	n-Billable Charges		
44	4	1-1/1 > >> + = 🗇	4 Q Q T T.		T	Q
#		Charge Code 🔎	Variant #	Pricing Notes		
1		DC-001	DC-01			
2						

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.

*	D) (Activate / Inactivate Service I	Pricelist						= 겨 = 두	+	? 🗔 🖪
	earch	1 Criteria									
		Service	Pricelist #				Description				
		Pricelis	t Category 🔍 🔻				Status	•			
			Currency 🔍 🔻				Part Pricelist #				
			Valid from	1111 (III)			Valid to		1111		
						Search					
	earch	1 Results									
44	4	1 - 10 / 140 🕨 🗰 🝸 🏹						III AII	T		Q
#		Service Pricelist #	Revision #	Description		Status	Pricelist Category	Currency	Effective Date fro.	n	
1		123	0	123213		Active		CAD	2015-09-06		
2		33132	0	ZN,N		InActive		CAD	2016-01-01		
3		400006-HM-SPL	0	Air Canada Heavy Maintenance	e	InActive		CAD	2006-01-10		
4		400007EM20125A5BSPL	0	AC CEM56 Eng 2012 SPL ETV		InActive		USD	2006-01-10		
5		400007EM2012APUSPL	lick here to	modify the details		InActive		USD	2006-01-10		
6		400007EM2012CF34SPL				InActive		USD	2006-01-10		
7		400007EM2012OnWingSPL	of service price	celist before		Active		USD	2006-01-07		
8		400007EM2012PpartSPL	activating or	inactivating	SPL 212	Active		USD	2006-01-10		
9		400016-CM-2005-SPL	5	J		InActive		USD	2010-01-12		
10		4000232-CM-2010-SPL	0	Repair, Overhaul CRJ parts		Active		USD	2010-20-09		
		4									۱.
			Comments								
		Activate				Inactivate			Return		

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*.

\star	D	Select Service Pricelist											+	5	6
-	Searc	h Criteria													
		Service Price	elist #				De	escription							
		Pricelist Ca	tegory 🔍 💌					Status	T						
		Cu	rrency 💌				Part P	ricelist #							
		Vali	d from	111				Valid to		Ē					
				S	earch										
-	Seard	h Results													
44	4	1 - 10 / 99 🕨 🕨 🝸 🔭						₽ 9 M	All		Ŧ				Q
#		Service Pricelist #	Revision #	Description	Status	Pn	icelist Category		Currency	Effect	ive Dat	te from			
1		123	0	123213	Active				CAD	2015-0	9-06				
2		400007EM2012OnWingSPL	0	AC EMC On Wing SPL	Active					2006-0	1-07				
3		400007EM2012PpartSPL	0	AC Ppart Random T&M Repair SPL 212	Active	Spe	cify starting da	ate fron	n 📃	2006-0	01-10				
4		4000232-CM-2010-SPL	0	Repair, Overhaul CRJ parts	Active	whi	ch the service	pricelis	it 🗾	2010-2	0-09				
5		400164-EMC-CFM56-SPL	0	Aeroturbine EMC CFM56 SPL	Active	hac	omos offostive			2008-0	1-12				
6		400604-CM-SPL	0	Volaris-CM-FHC-Service-PriceList	Active	bec	omes enective			2009-1	0-02				
7		400860-EM-RSAF-2011SPL	0	RSAF CFM56-2A2 Military SPL	Active					2011-0	1-11				
8		400870CM2010-SPL	0	Repair, Overhaul A319 / A320 / A321 Land	Active				USD	2010-2	0-09				
9		400944-EMC-CFM56-3-SPL	0	Air France EMC CFM56-3 SPL	Active				USD	2010-1	2-07				
10		400944-EMC-CFM56-5-SPL	0	Air France EMC CFM56-5-SPL	Active				USD	2010-1	2-07				
		4													۶.
		Com	ments												
			Confirm					C	ancel						_

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.

★ 🗎 Manage Service Pricelist			44 4 6 7 8 9 10 >	» 6 /99 🗐 🕫 🖶 🖶 🕻 🗮
- Identifier Details			Date Format	yyyy-dd-mm
Pricelist # / Rev. # Effective Date from Effective from (Existing	400604-CM-SPL /0 2009-10-02 節 2009-10-02		Description Effective Date to Status	Volaris-CM-FHC-Service-PriceList 2017-31-08 箇 Active
■ - Material Pricing Details Part Pricelist ≠ ₽ Effective till Date			Description	
Copy from Other Pricing Details Pricelist Category Currency Price Factor Details Remarks Resource Pricing Additional Task Level Charges	Specify the the service usD Not Required Volaris-SPL Differential Rates	category to which price list belongs	Other Currencies	Not Applicable
44 4 1 - 2 / 2 → → + = □ ≤ ∅	T Tx		x 2 8 × 6 F = H	All V
# Resource Type Resource # ₽ 1 Skills ▼ 2 Skills ▼ 3 ▼ ✓	Resource Desciption AIRCRAFT MECHANIC	Aircraft Model # D	Work Center # D Task Ty	pe Repair Classification
External Repair Pricing Details Pricing Basis	QUOTE VALUE		Applied on	Basic Value 💌
Pricing Factor for RO Pricing Factor for Adhoc PO	1.00000000		Pricing Factor for Service PO Pricing Factor for Direct Service	1.00000000 1.00000000
Comments				
Save		Confirm		Cancel
Edit Roster Code Details Activate / Inactivate Service Pricelist	Edit Non-Billable Elements		Upload Documents	
View Associated Doc. Attachments				
Record Statistics				

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*.

*	D	Define Process Entities							티 겨 를 다	← ? ि
s	earcl	h Criteria								
			Entity Typ	De Sale Type	•			Status 💌		
					Get Details					
E	ntity	Details								
44	4	1 -8/8 🕨 🗰 🕂 🗇	0 0 T Tx			D	L D 0	x ⊆ 首 ≫ ∓ ≠ Ⅲ All	v	Q
#		Entity Type	Entity	Description	Status		Process Par	rameters Defined?	Created by	Created Date
1		Sale Type	✓ PBH	POWER BY HOUR	Active	•	Yes		DMUSER	2012-07-01
2		Sale Type	✓ FC	Fixed Cost	Active	~	Yes		DMUSER	2016-04-02
3		Sale Type	✓ CM	Cost plus Margin	Active	•	Yes		DMUSER	2016-04-02
4		Sale Type	✓ FP	FIXED PRICE	Active	*	Yes		SKAR	2011-07-11
5		Sale Type	 Blended 	Blended	Active	•	Yes		SKAR	2011-07-11
6		Sale Type	 CPL 	COST PER LANDING	Active	•	Yes	Indicates whether process		2011-07-11
7		Sale Type	✓ FHC	Flight Hour Charge	Active	*	Yes	naramators for the optity	havo	2011-07-11
8		Sale Type	▼ T&M	TIME AND MATERIAL	Active	*	Yes	been defined	liave	2011-07-11
9			~		Active	*		been defined		
		•								۱.
					Define Process Entities					
Set Pr	ocess	Parameters								

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*.



*	Set Process Parameters		44 4 1	2 3 4 5 🕨 👐	1 /8 🗐 🕮 🖶 🖶	+ ? 🗔 🖪
E	ntity Details		TI . C.I			
	Entity Type Sale Type		The type of the	Entity PBH 💌		
	Record Status Active		entity you wish to	ters Defined? Yes		
P	rocess Parameter List					
44	4 1 - 7 / 7 → → + Ø Ø ▼ T _x			ii x² ₽ # 00 All	•	Q
#	Process Parameter	Permitted Values		Value	Status	Error Mess
1	Execution Type	Enter "0" for 'Non-maintenance Based' an	d "1" for 'Maintenance Based'	1	Defined	
2	Default Pricing Basis	Enter "0" for 'T&M', "1" for 'Fixed Price' an	d "2" for 'Usage Based'	0	Defined	
3	Default Category for Customer Order - Part Jobs	Enter a valid Order Category defined in O	ommon Masters business component.	1-Repair	Defined	
4	Default Category for Customer Order - Aircraft Jobs	Enter a valid Order Category defined in O	ommon Masters business component.	1-Repair	Defined	
5	Numbering Type for Contract	Enter "0" for 'Manual Numbering type' or	a Valid numbering type defined in	0	Defined	
6	Numbering Type for Customer Order Services	Enter a valid document numbering Type of	lefined in Document Numbering class	CO	Defined	
7	Default Repair Order Category for External Repair	Specify a valid Category as defined in 'Cr	eate Common Category' activity of	CS-REPAIR	Defined	
8	The permitted value for					
	The permitted value for					
	the attribute of the entity					
	4					+
		Set Process Pa	arameters			

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.

*	D	Create Nu	mbering T	уре									⊐⁄‡		⊉ ∢	- ?	[a [ĸ
-	Numb	ering Pattern		Numbering Type	AMR				Da Num Type De:	te Format	yyyy-dd-mm Auto Material Re	equest						
	Patte	rn Details —		Pre-populate Doc.#?	No 💌				Count of Free	e Numbers								
44	4	1 - 1 / 1	+ + +					<u>⊁⊡</u> ∎x	x = x e	# #	IIA II			Ŧ			Q	
#		Prefix	Suffix	Starting No	Ending No	Effective From	Effective To											
1		<u> </u>]			2016-01-01												
						En ⁻ wh be	ter the date startin nich the numbering comes effective	g from type										
_							Create Numbering Type											
Мар	Transa	ctions																

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.

*	D '	Transaction Mapping		44	4 1 2 3 4	5	ÞÞ	1 /29	1 📰	⊐‡			← '	? [ō K
	umbe	ring Type Information													
N	umbe	Numbering Type 123			Num Type Des	criptio	n 123								
44	44 4 1 - 10 / 292 > >> + C 40 43 Y 1 All														Q
#		Org. Unit Name	Transaction	Applicat	ble	D	efault Nu	imbering Typ	e						
1		RAMCO OU	3Party JLog Discrepancies	No		~ N	0								*
2		RAMCO OU	3Party TLog Discrepancies			✓ N	0								*
3		RAMCO OU	Accrual Run	No		~ N	0								¥
4		RAMCO OU	Acquisition Proposal No	No		✓ N	0								~
5		RAMCO OU	Advance Shipping Note	No		~ N	0								¥
6		RAMCO OU	Aircraft Warranty Agreement	No		✓ N	0								*
7		RAMCO OU	Allocation entry	No		N	0								~
8		RAMCO OU	Allocation incorporation	No	Select "Yes"	if v		vish to r	nap						*
9		RAMCO OU	Amendment of assets	No	the number	ing'	tyno	to this	Παφ						~
10		RAMCO OU	Asset Inter FB Transfer	No	organization		upe	to this							~
					organization	Idi U	unit								
			Edit Transaction Mapping												

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*.

ramco

Managa Cala Contract										-	→	0.1	
Manage Sale Contract												- " L	.© K
Contract Details Contract # / Rev. # P	2016-FPAEX	0	Create Contract	Modify Contr	ract			Go					
Primary Info. Aircraft Effectivity	Part Effectivity	Part Serial	Work Scope TAT - Air	craft TAT - F	Par	Tocl, & Excl Task	Excl Consumed Parts	Contract Upload	Summary				
Contract Type	Customer Specific	•		Obj. Eff.	Parts		T	Statu	is Approved				^
Contract Date	2012-01-01		Contr	act Start Date	201		11 1	10-11-11	2012-01-	01			
Effective from	2012-01-01				01	Select this rad	dio button and c	lick the					
Contract Stage	Firm	•	Enter Contrac	t Date		"Go" pushbut	tton if you wish t	o modify	0000412	3			
Sale Type	FP	•				a contract mo	ovement of aoo	ds in GR is	CAD			•	
Engagement Type	Full Maintenance	•	Co	ntrolling Unit 👂		allowed to di	fferent warehou	se or not					
	Contract Cove	erage Test			_		increme warehou.	se of not					- 1
Customer Information					-				-				
Customer # 👂	400004			Customer Name	Custom	er 7		Contact Perso	on				
Email				Phone			Cu	st. Contract # / Rev.	# TEST				
Cust. Contract Rev. Date						Revision Notes							
+ Copy From													
+ Revision Details													
				Save Contra	ict Main	Info.							-
 Click here to expand 	d the												
Record Statistics gro	oup box 💾	Contract					C	ancel Contract					
Edit P			Edit Terms of Execution				Edit Incoming &	Outaoina Terms					
Edit Additio			Upload Documents				View Associated	Doc. Attachments					
+ Record Statistics													

Figure 7.5 Managing customer contract

Record Statistics	
Created by DMUSER	Created Date 2016-15-02
Last Modified by DMUSER	Last Modified Date 2016-15-02
Confirmed by DMUSER	Confirmed Date 2016-15-02
Approved by DMUSER	Approved Date 2016-15-02
Cancelled by	Cancelled Date

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.

Belger and Telle	Death Pff and all all a	Deut Gentel	Weds Course	TAT Alam D	TAT D	a sha	Test o Test	Test	Fuel Comment Parts	Contract University of C			
Primary Info. Aircraft Effectivity	Part Effectivity	Part Serial	Work Scope	TAT - Aircraft	TAL - P	arts	Incl. & Excl	lask	Excl Consumed Parts	Contract upload Si	ummary		
Contract Type	Customer Specific	•			Obj. Eff.	Parts			~	Status	Approved		^
Contract Date	2012-01-01			Contract St	art Date	2012-0	01-01	Ê		Contract End Date	2012-01-01		
Effective from	2012-01-01			Ef	ffective to	2012-3	1-01	Ê		Revision Comments			
Contract Stage	Firm						_		~	Cust. Service Rep. 👂	00004123		
Sale Type	FP		The sta	arting date	e from	whi	ich		~	Currency	CAD	•	
Engagement Type	Full Maintenance	•	the rev	vised cont	ract is	effe	ctive			Analysis Code 👂			
	Contract Cover	age Test		nocu conc	i ucc is	c	cure			Remarks			
Customer Information													_
Customer # 👂	400004			Custom	ner Name	Custome	er 7			Contact Person			
Email					Phone				Cu	ist. Contract # / Rev. #	TEST		
Cust. Contract Rev. Date							Revision No	otes					
+ Copy From													- 11
+ Revision Details													- 1
				Sa	we Contrac	t Main	Info.						*

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.

Drimony Info	Aircraft Effectivity	Dart Effectivity	Dart Sorial	Work Scope	TAT - Aircraft	TAT - Darte	Incl. & Evel - Task	Excl Consumed Parts	Contract Unload Summary	
Diseless 0	Anciare Enectivity	Part Effectivity	Fait Sella	Work Scope	TAT - Anclarc	TAT F F dito	Incl. & Excl Task	EXcl Consumed Parts	contract opload Summary	
- Display O	ption									
	Mandatory	?				Specified?			Get	
44 4 [No	records to display]	+ – T T _x					Å		All Oli	▼
# 🗉 S	Sale Type Eff.	Type	Eff. Code	Req. Info.	Group	Mandato	ry? Specific	nd?		
								Indicates whe been specifier	ther details have d by you	

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.

Contr	act D	etails	Aircraft Effectivity Pa	art Effectivity Deta	ils Part Serial Work Sc	ope TAT - Aircraft TAT - Par	ts Incl. & Excl Task Excl Consumed Pa	rts Contract Upload Summary		
*	•		1 - 2/2 🕨 🗰 🕇	- 0 % 🛊 🖗	Y X		<u>▶ 11 5 x 2 3 × C 2</u>	3 ∓ +# 00 14 % Al	▼ Search	Q
#			Part Effectivity Code	Applicability	Part # 🔎	Part Group	Part Description	Covers Alternates?	Rmv. from A/C Group #	Home Bas Cons.
1			23	Specific	HBL1	×	HBL1	Yes 🗸	~	Not Allowe
2			24	Specific	QAS1	×	DAS1	Yes 🗸	~	Allowed
3						~ ~		~	~	Not Allowe
				The eff for the	fectivity of the ob Contract.	oject				
					4					•
Edit / Mana	ppro ge SL	ved Re A/Core	epair Supplier List e Return Rules		View Part Groups	Save F	View Aircraft Group	Stock Allocation Rules		

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*.

Primary	/ Info.	Aircraft Effectivity	Part Effectiv	/ity	Part Serial	Work Scope	TAT - Air	rcraft TAT	T - Parts Incl.	& Excl Task	Excl Co	onsumed Parts	Contract Uploa	ad Summary		
44 4	1 -	l/1 > >> + -	0 * •	Q T	T _x					노비로	XZİ	x4 📮 🖶 🔟	All		Ŧ	Q
# 0	Part	Eff. Ref. Code		PRT	Part # 🔎	Mfr.Part # 🔎		Mfr. # 🔎	Part D	escription		MSN 🔎	Serial # 🔎	Notes		Effective from
1 8	🛛 P1 🥆		*		0-0101-3-	0-0101-3-274	4		WASH	ER		111				
2 8	3		•													
	Code holding information on															
		a particula	ar row o	ana	art											
		attributes	ai 10w, e	8 pc	an c											
		attributes														
	4														+	
							Save Pa	art Serial Details								

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.

Prir	nary Ir	nfo. Aircraft Effectivity	Part Effectivity	Part S	erial Work Scope	TAT - A	ircraft TAT - I	Parts	Incl. & Excl Task	Excl Consu	umed Parts	Contract Upload Su	mmary		
44	4	1 -1/1 > >> + =		ç.						2 i × •	# # W	All		•	Q
#		A/C Eff. Code	Applicability		Aircraft Reg. # 🔎		Aircraft MSN 🔎		Aircraft Model # 🔎		Aircraft Grou	p #	Packa	де Туре	Exe. Wo
1			All	~	1101		MSN1101					\wedge	•	*	
2				~									-	*	
View	Aircraft	t Group			4		Save Aircraft	ft Effectiv	rity	he group	within v in this c	which aircraft			,

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.

Pri	nary I	nfo. Aircraft E	ffect	ivity Part Effectivity	Part Se	erial Work Scope TAT	- Aircraft TAT - Parts	1	Incl. & Excl Task Excl.	- Consumed Parts	Contract Upload Sum	mary	
		Work Enum	nerati	on									
44	4	1 - 4 / 4 🕨	•	+-0*001	T Tx						I All	-	Q
#		Eff. Ref.		Eff. Ref. Code	W	Vork Scope Code	Applicability		Task # 🔎	Task Description		WBS Code	Pricing Basis
1		Part Effectivity	~	P1	✓ W	VS1	Specified Work	~	3-00-65	3-00-64-DA		3-Operation	Fixed Price by
2		Part Effectivity	~	P1	✓ W	VS2	Specified Work	*	3-00-66	3-00-65-DD		3-OPER	Fixed Price by
3		Part Effectivity	~	P2	▼ W	V S3	Specified Work	~	3-00-61	Inspection 05		3-Operation	Fixed Price by
4		Part Effectivity	~	P2	~ V		Specified Work	*	3-00-62	1-A330-0000-CMM-00	005050-A	3-OPER	Fixed Price by
5			~		~ /			~					
					 Enter	work scope code			۲				Þ
							Save Work S	cope	2				

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.

Contract Details Aircraft Effectivity	Part Effectivity Details Part Seria	al V	Work Scope TAT - Aircraft	TA	AT - Parts	In	cl. & Ex	xcl	Task	Excl Consumed Pa	rts C	ontract Upload	d Summary
📢 🖌 [No records to display] 📦 📦	+ - 0 + T T.				xi C	4	ie (10	t	1 20	All		•	Q
# 🖾 A/C Eff. Ref. Code	Aircraft Model #	P	Aircraft Group #		Package T	Гуре			Exe. W	ork Center #	ρ	Priority	TAT
1 🗇	*			*				*					*
	<	Clic deta effe	ck here to save the TAT tails in the contract for an ectivity code	1									,
	Confirm Contract									Cancel Contract			
Edit Pricing & Invoicing Details Edit Additional Info.	Edit Terms of Execution		Edit Inco Upload D	ming ocur	g & Outgoin ments	ng Ten	ms			View Associat	ed Doc. A	ttachments	

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.
- 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.

Primar	/ Info.	Aircraft Effectivity	Part Effectiv	rity Part Serial	Work Scope TA	T - Aircraft TAT - Part	s Incl. & Excl Task Excl	il Consumed Parts	Contract Upload Summary		
••	1 -	1/1 > >> + -	0 * •	© ▼ ▼,				1 x C I = 11	All	•	Q
# (Part	Eff. Ref. Code		Part # 🔎	Mfr.Part # 🔎	Mfr. # 🔎	Part Description	Covers Alt	ernates?	Part Group	Repa
1	ALL		*	0-0050845-0:5N982	0-0050845-0	5N982	TERMINAL	Yes	*	400007-CM-A330 🗸	
2			*						*	*	
				4							•
						Save Part TA	T Details				
						Savertarena					

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.

											1.0				
Contrac	t Details	Aircraft Effectivity	Part Effectivity Details	Part Seria	Work Scope	TAT - Aircraft	TAT - Parts In	cl. & Excl Task Ex	cl Consumed Parl	s Contract Uplo	ad Summ	ary			
	Inclus	ion Enumeration					Exclusion Enum	eration				Definition for	Regu	ar Repair	-
	lusion /	Exclusion List													
	•	1 - 1/1 🕨 🕨	+ - 🗆 🗶 🌣 💋	Y X				노 🗉 🗹 🛛	2 🖹 🕶 🗳 🎽	¥ 🗰 💷 🗱	% AI	I	-	Search	Q
	_	Context Ref.			Excl. / Inc. Ref.					Task Attribut	es				
#		Eff. Ref.	Eff. Ref. Code		Task Incl. / Excl.	Code		Basis	Work Type	Task Type		Task #	Q	WBS Code	Ti
1		,	v	~				~		~	~				
2			v	~				~		~	~				
		4													•
BE															
		Pricing Ba	sis		•										
		BER Responsibili	ity		-	BER Rep	air Threshold (%)				BER 9	% Based on			-
		BER Evaluation Ba	sis		-		BER Pricing		-						
									-						
							Save Task Inclus	sions & Exclusions							

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.



Pri	nary 1	info. Aircraft Effect	ivity Part Effectivity	Part Serial	Work Scope	TAT - Aircraft	TAT - Parts	Incl. & E	Excl Task	Excl	- Consur	ned Par	ts	Contract Upload Summary		
		Exclu	usion Enumeration													
44	•	1 -1/1 > >>	+-0***	T Tx					人上日	XE	₿ X4	# #	0110	All	Ŧ	Q
#		Eff. Ref.	Eff. Ref. Code	Parts	Excl. Eff. Code		Part # 🔎		Mfr.Part # 🖇	þ	Mfr. #	₽		Part Description		Covers Alternates?
1		Aircraft Effectivity 🗸	P1	~			0-0050845-0	0:5N982	0-0050845-0					TERMINAL		
2		*		*												
																r
							Save Part Exclu	usions								

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.

Contract # Contract # Contract Type Contract Type Contract Status Sale Type Contract Category Rev Valid to Each Contract Category Rev Valid to Each Contract Category Rev Valid to Contract Status Sale Type Contract Category Rev Valid to Each Contract Category Rev Valid to Each Contract Category Rev Valid to Each Contract Category Db, Eff. Rev Effective from Contract Type Contract Category Db, Eff. Rev Effective from Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category Discrete Category D	★ Щ	A	pprove / Close Cu	stomer Contract							9 24 q		- 2 6	
Contract # Contract Type Contract Status Contract Category Obj.Eff. Contract Category Sale Type Contract Category Costomer # Rev. Valid from Mile Mile Search Contract Type Contract Category Contract Previous Contract Previous Contract Previous Contract # Contract # <th>Sea</th> <th>ch C</th> <th>riteria</th> <th></th>	Sea	ch C	riteria											
Obj. Eff. Contract Category Sale Type Rev. Valid to Customer # Rev. Valid from Rev. Valid to Rev. Valid to			Contra	act #			Contract Type		▼ C	ontract Status			Ŧ	
Customer # Rev. Valid form Rev. Valid form Search Contract Details Image: Contract # Revision # O Approved FP Quotomer # Customer # Contract Category Obj. Eff. Rev. Flective from 2 2016-FPAEX 2 Approved FP 400004 Customer 7 Parts 2012-01-01 3 2016-FPAEX 2 Approved FP 400004 Customer 7 Parts 2012-01-02 4 400007/EMCF348n10 0 Approved FP 400004 Customer 7 Parts 2012-01-02 5 4 400007 Customer 9 SLA Parts 2012-01-02 4 400007/EMCF348n10 0 Approved T&M 400007 Customer 9 SLA Parts 2011-12-11 6 4 400007 Customer 9 SLA Parts 2011-22-11 8 Click here to select the proved T&M 400007 Customer 9 SLA Parts 2012-21-01 9 Click here to select the proved T&M 400007 Customer 9 SLA Parts 2012-21-11 9 5 Approved T&M 400007 Customer 9 S			Obj.	. Eff.	•		Contract Category		V	Sale Type			Ŧ	
Search Contract Details			Custom	ier #			Rev. Valid from			Rev. Valid to			Ē	
Image: Contract # Status Sale Type Customer # Customer #<	- Cont	ract	Details				Search	١						
# Contract # Revision # Status Sale Type Customer # Customer Name Contract Category Obj. Eff. Rev. Effective from 1 2016-FPAEX 0 Approved FP 400004 Customer 7 Parts 2012-01-01 2 2016-FPAEX 2 Approved FP 400004 Customer 7 Parts 2012-01-02 3 2016-FPAEX 3 Approved FP 400004 Customer 7 Parts 2012-01-03 4 400007EMCFD348n10 0 Approved T&M 400007 Customer 9 SLA Parts 2011-12-11 6 400 F2348n10 5 Approved T&M 400007 Customer 9 SLA Parts 2011-16-11 7 400007 EMCFD348n10 5 Approved T&M 400007 Customer 9 SLA Parts 2011-16-11 6 400 F2348n10 5 Approved T&M 400007 Customer 9 SLA Parts	4	4	1 - 10 / 502 >>>>) + - D + C				人间回义		All	•		Q	
1 2016-FPAEX 0 Approved FP 40004 Customer 7 Parts 2012-01-01 2 2016-FPAEX 2 Approved FP 40004 Customer 7 Parts 2012-01-02 3 2016-FPAEX 3 Approved FP 40004 Customer 7 Parts 2012-01-02 3 2016-FPAEX 3 Approved FP 40004 Customer 7 Parts 2012-01-02 4 400007EMICF3ME10 0 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 6 401 F348-10 5 Approved T&M 40007 Customer 9 SLA Parts 2011-16-11 7 40000 5 Approved T&M 40007 Customer 9 SLA Parts 2012-31-01 8 Click here to select the or firmed T&M 40007 Customer 9 SLA Parts 2012-31-01 10 Click here to select the or proved T&M 40007 Customer 9 SLA Parts 2012-31-01	#		Contract #	Revision #	Status	Sale Type	Customer #	Customer Name	Contract Category	Obj. Eff.		Rev. Effective	e from	
2 2 016-FPAEX 2 Approved FP 400004 Customer 7 Parts 2012-01-02 3 2 016-FPAEX 3 Approved FP 400004 Customer 7 Parts 2012-01-02 4 00007EMCF346n10 0 Approved T&M 400007 Customer 9 SLA Parts 2011-12-11 6 +400-07EMCF346n10 4 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 6 +400-07EMCF346n10 5 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 6 +400-07EMCF346n10 5 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 7 +400001 6 Approved T&M 40007 Customer 9 SLA Parts 2011-25-11 8 Click here to select the ortract that you wish to approve, return or close mirmed T&M 40007 Customer 9 SLA Parts 2012-31-01 4 Parts outomer 9 SLA Parts 2011-21-11 201	1		2016-FPAEX	0	Approved	FP	400004	Customer 7		Parts	2	2012-01-01		
3 2016-FPAEX 3 Approved FP 40004 Customer 7 Parts 2012-01-03 4 4000007/EMCF348n10 0 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 5 4000007/EMCF348n10 4 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 6 40000 T&M 40007 Customer 9 SLA Parts 2011-16-11 6 40000 G. Approved T&M 40007 Customer 9 SLA Parts 2011-25-11 7 - 400000 G. Approved T&M 40007 Customer 9 SLA Parts 2012-31-01 8 Click here to select the contract that you wish to approve, return or close minmed T&M 40007 Customer 9 SLA Parts 2012-31-01 10 Proved T&M 40007 Customer 9 SLA Parts 2012-31-01 10 proved T&M 40007 Customer 9 SLA Parts 2012-31-01 10 proved <td>2</td> <td></td> <td>2016-FPAEX</td> <td>2</td> <td>Approved</td> <td>FP</td> <td>400004</td> <td>Customer 7</td> <td></td> <td>Parts</td> <td>2</td> <td>2012-01-02</td> <td></td>	2		2016-FPAEX	2	Approved	FP	400004	Customer 7		Parts	2	2012-01-02		
4 4 4000007EMCF348n10 0 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 5 0007EMCF348n10 4 Approved T&M 40007 Customer 9 SLA Parts 2011-12-11 6 400 5 Approved T&M 40007 Customer 9 SLA Parts 2011-16-11 7 40001 6 Approved T&M 40007 Customer 9 SLA Parts 2011-26-11 9 00000 6 Approved T&M 40007 Customer 9 SLA Parts 2012-31-01 9 0001 6 Approved T&M 40007 Customer 9 SLA Parts 2012-31-01 9 001 0 proved T&M 40007 Customer 9 SLA Parts 2012-31-01 10 proved, return or close proved T&M 40007 Customer 9 SLA Parts 2012-31-01 10 proved, return or close proved Bended 40006 Customer 8	3		2016-FPAEX	3	Approved	FP	400004	Customer 7		Parts	2	2012-01-03		
5 0072FMCF348n10 4 Approved T&M 40007 Customer 9 SLA Parts 2011-14-11 6 400 15 Approved T&M 40007 Customer 9 SLA Parts 2011-16-11 7 400000 0 5 Approved T&M 40007 Customer 9 SLA Parts 2011-16-11 7 400000 0 5 Approved T&M 40007 Customer 9 SLA Parts 2012-31-01 8 Click here to select the onimed T&M 400007 Customer 9 SLA Parts 2012-31-01 10 Optrove, return or close proved T&M 400007 Customer 9 SLA Parts 2012-31-01 10 optrove, return or close proved T&M 400007 Customer 9 SLA Parts 2012-31-01 10 optrove, return or close proved Bended 400006 Customer 9 SLA Parts 2011-12-11 Approve Return Costomer 9 SLA Parts 2011-12-11 <td r<="" td=""><td>4</td><td></td><td>4000007EMCF348n10</td><td>0</td><td>Approved</td><td>T & M</td><td>400007</td><td>Customer 9</td><td>SLA</td><td>Parts</td><td>3</td><td>2011-12-11</td><td></td></td>	<td>4</td> <td></td> <td>4000007EMCF348n10</td> <td>0</td> <td>Approved</td> <td>T & M</td> <td>400007</td> <td>Customer 9</td> <td>SLA</td> <td>Parts</td> <td>3</td> <td>2011-12-11</td> <td></td>	4		4000007EMCF348n10	0	Approved	T & M	400007	Customer 9	SLA	Parts	3	2011-12-11	
6 40000 F548010 5 Approved T&M 400007 Customer 9 SLA Parts 2011-16-11 7 400000 10 6 Approved T&M 400007 Customer 9 SLA Parts 2011-25-11 8 Click here to select the contract that you wish to approve, return or close mirmed T&M 400007 Customer 9 SLA Parts 2012-35-11 10 Contract that you wish to approve, return or close FAM 40006 Customer 9 SLA Parts 2012-30-10 10 Emprove Blended 400006 Customer 9 SLA Parts 2012-31-01 10 Emprove Blended 400006 Customer 9 SLA Parts 2012-12-11 Contract that you wish to approve, return or close Feeture Feeture Close	5		9007EMCF348n10	4	Approved	T & M	400007	Customer 9	SLA	Parts	2	2011-14-11		
7 0 6 Approved T&M 40007 Customer 9 SLA Parts 201-25-11 8 0 Click here to select the origination of the contract that you wish to oproved T&M 40007 Customer 9 SLA Parts 201-25-11 9 0 Click here to select the oproved T&M 40007 Customer 9 SLA Parts 2012-31-01 10 0 proved Blended 40006 Customer 9 SLA Parts 2012-31-01 V	6		400 CE348n10	5	Approved	T & M	400007	Customer 9	SLA	Parts	2	2011-16-11		
8 Click here to select the contract that you wish to approve, return or close nimed T&M 40007 Customer 9 SLA Parts 2012-31-01 10 Proved T&M 40007 Customer 9 SLA Parts 2012-31-01 10 Proved Blended 40006 Customer 9 SLA Parts 2012-31-01 Improved Blended 40006 Customer 8 SLA Parts 2011-12-11 Improve	7		400000	6	Approved	T & M	400007	Customer 9	SLA	Parts	2	2011-25-11		
9 Contract that you wish to approve, return or close proved T& M 40007 Customer 9 SLA Parts 2012-31-01 10 proved Blended 40006 Customer 8 SLA Parts 2011-12-11 4	8		Click here to	o select the	nfirmed	T & M	400007	Customer 9	SLA	Parts	2	2012-31-01		
10 approve, return or close proved Blended 400006 Customer 8 SLA Parts 2011-12-11 Approve	9		contract tha	at you wish to	proved	T & M	400007	Customer 9	SLA	Parts	1	2012-31-01		
Approve Return Close	10		approve, ret	turn or close	proved	Blended	400006	Customer 8	SLA	Parts	2	2011-12-11		
Approve Return Close													+	
Approve														
				Approve				Return		Cl	ose			

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.

7	r	D	Maintain Object Ref.	Date	25							7\$	ţ	+	?	[¢]	ĸ
6	0	bject	Details										 				
			Search On	Aircraft	t Group 💌 🔻 AAC-AL	L	T	P		Get							
6	0	bject	Reference Dates										 				-
	44	• 0	No records to display]	••	+ - 🗗 🛠 T T,				노비명	X 🛛 🗎 🛛 👎	L 🗯 💷 🗛 📈 🗚		•				ρ
	#		Aircraft Reg. #	ρ	Date Reference		Ref. Entity	Entity	#	Ref. Date	User Remarks						
	L				Entry into Service Date	~	*		~								
								Sav	e Ref. Dates								
								·									

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.
 - Description: 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.

70 | Sales Setup

★ 🗎 Set Parameter		겨 콤 다 ← ? 뎒 🗖
Set Parameter Details Customer # Yes	Contract # Yes v	Task # Yes 💌
Task Type No 💌	Task Category No 💌	
Percent Statistics 'Task -Billing Element	Set	
Task-Billing element Mapping		Created by DMUSER

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.

*	0	Task-Billing Eleme	ent Mapping								고 등 다 ← (2 🖬 🗖
	iearch	criteria										
_		Customer #	ρ		(Contract # 👂		Tas	sk basis	T	Q	•
						Search						
44	4	1 - 10 / 11 🕨 🕨	+ - 🗆 🛠 T	T _x					8 9 U	All	-	Q
#		Customer # 👂	Contract # 🔎	Task # 🔎	Task Type	Task Category	Billing Ref. & Element	S	tatus	Created Date	Created by	Modif
1		400007	MSA-AAC-01	AIRTASK-1	*	*	Fixed Fee	✓ A	kctive 🗸	18/Apr/2018	12160	08/Ju
2		400007	MSA-AAC-01	AIRTASK-2	*	*	Fixed Fee	*	~	18/Apr/2018	12160	
3		400007	MSA-AAC-01	AIRTASK-3	~	*	Fixed Fee	*	~	18/Apr/2018	12160	
4		400007	MSA-AAC-01	NST-005946-2018	*	*	Maintenance	🗸 A	kctive 🗸	18/Apr/2018	12160	08/Ju
5		400007	MSA-AAC-01	NST-005947-2018	*	*	Maintenance	🗸 A	kctive 🗸	18/Apr/2018	12160	08/Ju
6		400007	MSA-AAC-01	NST-005948-2018	*	*	Maintenance	🗸 A	kctive 🗸	18/Apr/2018	12160	08/Ju
7			6YJMA-EXE-2	1-50C-0000-CMM-	*	*	Fixed Fee	🗸 A	kctive 🗸	08/Jun/2018	DMUSER	
8			6YJMA-EXE-2	0005	*	*	Maintenance	🗸 A	kctive 🗸	08/Jun/2018	DMUSER	
9			6YJMA-EXE-2	1-B737-0500-Othe-	~	*	On Call Fee	🗸 A	kctive 🗸	08/Jun/2018	DMUSER	08/Ju
10			6YJMA-EXE-2	2-8737-0500-Othe-	*	*	Fixed Fee	🗸 A	kctive 🗸	08/Jun/2018	DMUSER	
		<										>
						Save]					

Figure 7.19 Task Billing Element mapping

In the Search Criteria group box,

- 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.

Index

Α

Acknowledgement, 23 Activating customer, 19 Activating or inactivating part pricelist, 44 Activating or inactivating part pricelist, 55 Activating or inactivating pricelist for service sales, 51 Additional task Level Charges, 48 Alternate Pricelist, 42 Approving customer contract, 68 Attribute, 29 Automatic Invoice Authorization, 25

В

Bank ESR, 12 BER Repair Threshold (%), 67 Billable?, 16 Breakup Details, 43

С

Contact Person Details, 27 Contract / Rev #, 62 Contract Reference, 22 Controlled Group, 18 Copy Options, 39 Covers Child Parts?, 64 Creating / modifying customer contract, 61 Creating customer contract, 59 an entity for customer contract, 59 customer details, 9 customer group, 18, 20, 21 numbering type for a contract, 57 part pricelist, 35 service pricelist, 45 Credit Check Action, 13 Credit Term Code, 13 Customer Group Type, 18 Customer registration process, 6

D

D & B Code No., 13 Defaulted?, 16, 17

ramco

Define rules, 20 Defining / modifying the attributes of an entity for customer contract, 56 Defining category master, 28 customer payment terms, 29 tax, charge and discounts, 32 factor at pricing element level, 38 multiple price list, 39 price factor breakups, 40, 48 pricing directly, 40 pricing Profile, 37 reference pricelist priority, 38 Delivery Area #., 11 Delivery Area, 15 Discount Grace Days, 13 Document type, 33 Dunning Required, 13

Ε

Editing the commercial information for the customer, 13 Eligibility For Rebate, 22 Email information, 13 Engagement Type, 10, 60 Entering information contact person for acustomer, 24 part master details for a customer, 14 receipt information payment for thecustomer, 12 tax and charge information for the customer, 15 the default 'ship to' or 'bill to' customer details, 24 Sales point details for a customer, 22 Entity Type, 56 External Repair Pricing Details, 47

F

Factor Value, 48

G

Grouping customer, 18

I

Identifier Details, 46 Identifying delivery area, 30 ITAR compliance, 11

L

LC Applicable? 11 LSV Contract ID, 12

Μ

Maintain automation rules, 20 **INCO TERMS, 21** Maintaining additional information of customer, 26 category codes, 28 default rules for inco terms, 21 object reference dates, 66 Managing additional options, 14 resource pricing details, 47 restricted stock status, 16 sales tax rules, 33 Map Transactions, 58 Mapping Numbering type for customer Contract creation, 58 Material Pricing Details, 46 Modifying / revising part pricelist, 42 Modifying / revising pricelist for service sales, 53 Modifying numbering type for contracts, 58 Msn, 62 Multiple Operators?, 10 Ν Nature of Relationship, 11 Numbering Pattern, 57 0

Object Reference Dates, 66 Object reference Dates, 66 Operator #, 10

Ρ

Package Type, 62 Parameter For, 9 Parent Customer Code, 10 Part Eff. Ref. Code, 62 Part shipment Allowed, 23 Pattern Details, 57 Permitted Values, 9 Preparing pricelist for service sales, 45 Preparing part pricelist, 35 Price factor details?, 37 Pricelist category, 36 Process parameter, 9

MCO

R

Reasons For Return / Closure, 66 Receipt Mode, 12 Recording aircraft effectivity details, 62 exclusions for consumed parts, 64 non-billable charge details, 51 non-billable part details, 50 non-billable resource details, 50 non-billable task details, 50 part effectivity details, 61 part serial details, 62 primary contract information, 60 standard work scope details, 63 task inclusions and exclusions, 64 turnaround time details for aircraft, 63 turnaround time details for parts, 63 non-billable element details in the service pricelist, 49 roster code details, 48 sales point specific information for customer, 22 Ref. Catalogue ID, 37 Reference Status, 10, 19 Registering customer, 9 Repair Process Code, 64 Restriction Type, 14 Roster Code Basis, 49 Roster Code, 46

S

Sales Point, 11 Setting parameters ask-billing element mapping, 66 Setting options for part pricelist, 35 options for service pricelist, 45
sales process parameters, 9 Shipping Point, 23 Slab definition For, 38 Specified?, 61 **T** Task-billing element mapping, 67 TAT – Stated In, 63 Tax Exempt, 22 Tax Payer ID No., 13 Tax Registration Details, 16 TCD Variant *#*, 15 Termination Date, 66

ramco

Trade Regulatory Compliance, 11 Trading Partner, 21 Transhipment Allowed, 23 **V** VAT Information, 12 Vendor #, 40 Viewing contract upload summary, 61 Visit Count, 61 Visiting Hours, 24 **W** Work Enumeration, 63



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