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	Title: ZVMC Service Plan Create	Page #: 1 of 10	
Procedure Owner(s) – list Functions: Contract Administration		Revision's Training Requirements – select one or both (per section #9): Awareness _ Formal _X	

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1 PURPOSE


- 1.1 To provide instruction on how to properly create a Service Plan (ZVMC).

2 SCOPE – APPLIES TO WHERE & WHEN THE PROCEDURE IS USED

- 2.1 This procedure applies to all Service Contract Administration staff operating in the SAP CRM environment. It will be used to create ZVMC orders.

3 DEFINITIONS AND ACRONYMS

- 3.1 **Component ID:** The CRM assigned number that corresponds to the ECC Equipment Number. A specific piece of MTS equipment within the Installed Base.
- 3.2 **Contact:** Person/End User contacting MTS for assistance.
- 3.3 **Header Line Item:** The upper level service category of the deliverable services.
- 3.4 **Installed Base (IBase):** The CRM assigned number that corresponds to the ECC Functional Location.
- 3.5 **Product ID:** Service Product number used to represent services to be delivered.
- 3.6 **PO:** Purchase Order.

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- 3.7 **SAP CRM:** CRM system used to enter information.
- 3.8 **SAP ECC:** The MTS System used to track financial information.
- 3.9 **Sub-Line Item:** The service products (activities) to be delivered under the header line item. Each has its own component and price.
- 3.10 **Time Based:** Services sold as “coverage” over a period of time such as extended warranty or software coverage. Also applies to Site Plan coverage.
- 3.11 **ZVMC:** Service Plan Type (Transaction type).

4 GRAPHIC (IF NEEDED)

5 RESPONSIBILITIES

- 5.1 Service Contract Administration: Create and maintain Service Plans in CRM.
- 5.2 Service Sales: Quotes and obtains purchase order.

6 PROCEDURE


CREATE

- 6.1 In CRM from the left navigation bar, choose “Service Contracts” to see the screen below. From here, you may create a new contract or search for an existing one.




- 6.2 To create a ZVMC, click [Create Service Contract] and choose Transaction Type “ZVMC”.

Transaction Type	Transaction Type Description
ZPMC	Bundled Contract
ZBMC	Maintenance Contract
ZPG	Pay Go Contract
ZVMC	Service Plan
YSC1	SLA Serv.Contract
ZVBC	Value Based Contract


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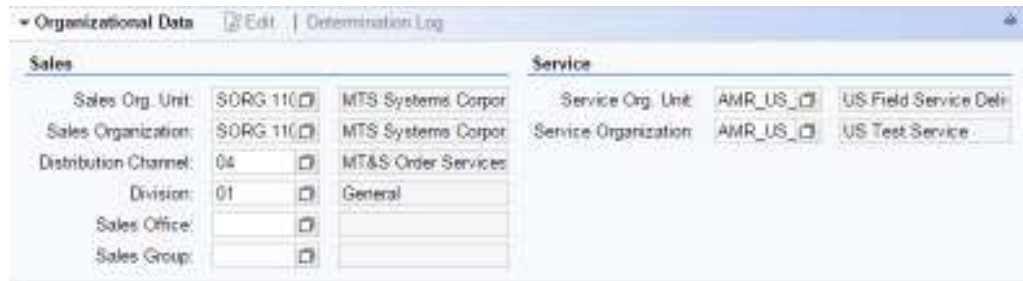
- 6.3 Enter the Sold-to number in the appropriate field in the General Data section and press the Enter key.
- 6.4 Select the Bill-to Party, Payer, Site, and Contact Person if prompted.
 - 6.4.1 If no contact is available to select, create a contact in CRM.
 - 6.4.2 These entries can be modified in the “Parties Involved” later if needed.

Service Contract Details 	
General Data	Processing Data
ID: 820005433	Status: Released
Sold-To Party: TREDEGAR FILM PRODUCTS CORP	System Status: Distributed Released
Contact: Whitney Shepperson	PO Number: 187611
Employee Responsible: Ms. Olivia R Root	PO Date: 11/17/2017
Funding Source: Commercial	Net Value: 6,780.00 USD
Govt Identifier: None	Payment Terms: Net 30
Description:	Billing Block Status: Nothing Blocked
	Shipping Cond.: Ground Transport
Monthly Statement Type	Dates
Statement Type: Detailed Line Item	Contract Start: 12/01/2017
	Contract End: 11/30/2018

NOTE: Required fields are outlined in red until completed.

- 6.5 **USA Only:** In the General Data section, select the “Funding Source” and “Govt. Identifier” from the drop down list.
- 6.6 Enter information in the Description field (optional).
- 6.7 Enter the purchase order (PO) number and date.
- 6.8 Make any necessary changes to the currency using the drop down menu.
- 6.9 Select the appropriate payment terms from the list based on the customer agreement (PO) and DOA approvals received (if necessary).
- 6.10 Select shipping conditions (if applicable) defined on the customer PO.
- 6.11 Review the contract start and end dates and revise as necessary.
- 6.12 Update the Monthly Statement Type as directed by sales on the order submittal form.
- 6.13 Review Organizational Data assignment block in the Contract section to confirm the Sales Organization, Distribution Channel and Service Organization.

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The screenshot shows the 'Organizational Data' screen in SAP. It is divided into two main sections: 'Sales' and 'Service'.
Sales Section:
 Sales Org. Unit: SORG 110 (dropdown) MTS Systems Corpor
 Sales Organization: SORG 110 (dropdown) MTS Systems Corpor
 Distribution Channel: 04 (dropdown) MT&S Order Services
 Division: 01 (dropdown) General
 Sales Office: (dropdown)
 Sales Group: (dropdown)
Service Section:
 Service Org. Unit: AMR_US (dropdown) US Field Service Deliv
 Service Organization: AMR_US (dropdown) US Test Service

6.14 If the individual who sold the contract is someone other than the Primary Service Sales engineer on the account, go to Contract section “Parties Involved” and update the “Order Engineer” to reflect the correct individual.

NOTE: Any other necessary partner changes can be made in this area.


6.15 If event-based or flexible content is included in the contract, go to the section “Items” and enter the Service Plan Product code “FLEXPLAN” in the product code column and press the Enter key.

NOTE: If the contract contains flexible funds, this should always be entered first as line item 10.

6.16 Click the “Edit” icon to the left of the line item to access the Service Contract Item Details screen.

6.16.1 Scroll down to the Price Details section and enter the plan price in the “GVCP” pricing condition.

6.16.2 The “Net Value” field near the top of the screen will display this amount.

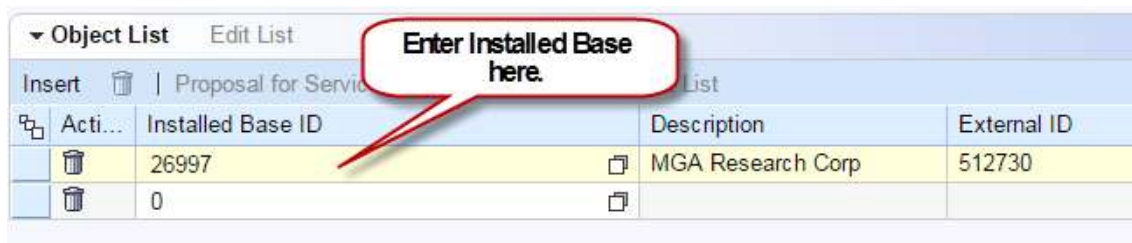
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6.17 Go to the Object List section and enter each Installed Base ID covered by the “Service Plan.”

6.17.1 If more than one Installed Base (site) will be covered by this flexible line item, each will need to be added as a separate line.


NOTE: The Installed Base ID can be searched for by using the input help and entering the site number in the external ID field.



6.18 Click [Back] to return to the Contract screen.

NOTE: If there are approved changes to the standard ZVMC discount structure for this specific contract, follow the steps shown in the “How to Set unique discount structure on a Contract” instruction document located in QMS Examples & Best Practices

6.19 Enter the header and sub-line items for any Time Based items included on the Service Plan. (MES, SitePlan, or ExtWarranty,).

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6.19.1 Enter applicable sub-line items for the Time Based header category.

6.19.1.1 Header line items: Enter product ID only and click [Enter].

6.19.1.2 Sub-line items: Reference the appropriate header line item in the “Ref” column field, enter the Product ID and quantity, and click [Enter].

6.19.1.3 Repeat these steps for all header/sub-line items.

6.20 Enter header and sub-line Installed Base (IBase)/component data, confirm or update price, and update line item site data as required by clicking on the edit icon to the left of the item.

6.21 If the billing plan on the order needs to be something other than “In Full” or the billing date should not be the date entered; maintain the billing plan at each header line item level by selecting the edit icon to the left of the item.

6.21.1 Go to the Billing Plan assignment block.

6.21.2 Edit the existing line item or click on **Insert** to add another line item to the billing plan.


6.21.3 Enter a Billing Date and Billing Value for each line item added.



Item	Billing Date	Description	Invoice %	Billing Value	Crpy	Billed
700001	11/09/2017	In Full	100.00	10,000 JPY		

6.21.4 Repeat steps 6.20 for each Header Line item in the order.

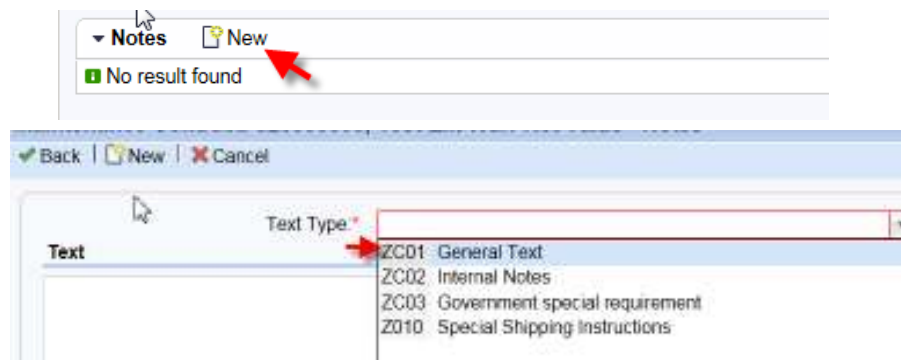
NOTE: Be sure to select the same plan for each header line to ensure consistent billing to the customer.

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6.22 Click [Back] to return to the Contract screen.

6.23 To add special text to the contract, go to the Notes assignment block.

6.23.1 Select “New.”



6.23.2 Select “General Text” to enter text that will print on subsequent customer documentation.

6.23.3 Select “Government Special Requirements” to enter any U.S. government requirements that apply to the contract.

6.23.4 Select “Internal Notes” to enter any contract specific notes that should be viewed by MTS employees only.

6.23.5 Select “Special Shipping Instructions” to enter any contract specific shipping instructions that should flow to call-off orders

6.24 Confirm that all “Parties Involved” are correct by opening the Parties Involved assignment block.


6.24.1 If the employee who sold the service is someone other than the assigned Service Sales Engineer on the site, update the Order Engineer partner.

6.25 Review and resolve any errors (located in the upper right hand corner).

6.26 Change the order status to “Released” in the General Data section of the order.

6.27 Click [Save] at the top of the page to save the Service Plan.

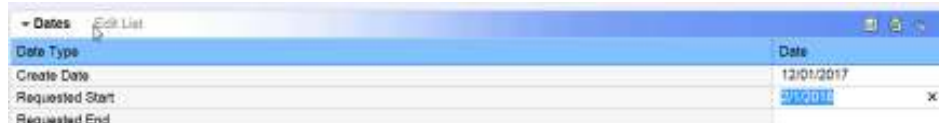
Note: The Contract Acknowledgement will automatically be emailed to the customer contact listed on the order, the assigned Service Sales partner, and the

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assigned FSE (if applicable).

- 6.28 **If** the contract includes any MES or Echo content, create a Follow-up task from the contract and assign it to Olivia Root or Kyle Brager. This is required so the customer's access to Echo or MES updates is authorized through the Echo platform.
- 6.29 **If** the contract includes planned event-based activities, continue on to create the service call-off orders as appropriate following the "ZOPT Service Order Create" process.

NOTE: If the contract start date is in the future, when creating the ZOPT service order you will need to enter a Requested Start date in the Date section of the ZOPT order **before** entering any header data in the order.




The earliest start date defined in the ZOPT order must be within the contract validity period

- 6.30 **If** a Site-Plan was included in this contract, continue on to "Create ZINS Order" following the "ZINS Service Order Create" process.
 - 6.30.1 Enter the following header line items only;
 - TRAVELXP (will default)
 - REPAIRNO
 - CALIBRATIONNO
 - ROUTINENO
 - TRAININGNO
 - 6.30.2 Send an email to the assigned Site Plan FSE with the order number.

7 ASSOCIATED QUALITY RECORDS – AS STATED IN THE QUALITY RECORDS LIST

Required Record

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8 REFERENCE FORMS / TEMPLATES / DOCUMENTS

Form / Template / Document Title	Location

9 CURRENT REVISION'S TRAINING REQUIREMENTS

Training requirements are determined by the document owner.

1. Select Awareness **and/or** Formal training requirements.
2. List (below) the functions or groups that require the training.


Select (mark X)	Training Type	Training Definition
	Awareness	Awareness training is conducted by communication, which is sent/delivered by the approver/author/owner of the document to the affected employees/groups.
X	Formal	Formal training requires the approver/author/owner to collect/store evidence that the affected employees/groups were trained.

Functions/Groups that require Awareness to this procedure:

- Awareness: List here the function(s) or group(s) that need to be aware of this procedure.
- Formal: List here the function(s) or group(s) that require Formal training.
 - Service Administration

10 REVISION HISTORY & APPROVAL

Revision History			
Rev	Description of Change	Author	Effective Date

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1	Original Release	Kyle Brager	11/06/2017

Approval of Current Revision		
Name / Function	Signature	Date
Michelle Bintliff / Global Service Administration Manager	<i>Michelle Bintliff</i>	11/27/2017