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### 1 PURPOSE

- 1.1 To provide instruction on how to properly add funds to an existing ZVMC Service Plan upon receipt of customer purchase order.


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

- 2.1 This procedure applies to all Service Contract Administrators and will be used to add (and invoice) funds to an existing ZVMC Service Plan

### 3 DEFINITIONS AND ACRONYMS

- 3.1 **SAP CRM:** CRM system used to enter information.

### 4 GRAPHIC (IF NEEDED)

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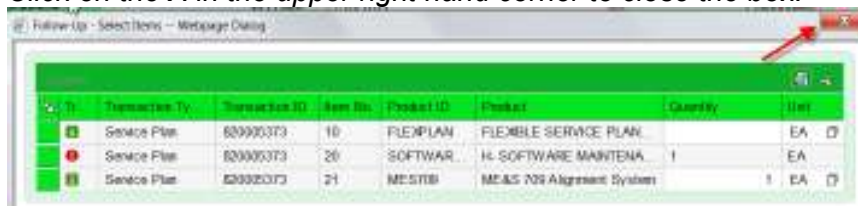
**5 RESPONSIBILITIES**

5.1 **Contract Administrator:** Responsible for creation of new contracts, balance analysis, add/remove funds, and appropriate rollover (credit/debit) of funds from expiring contract to the new contract.

**6 PROCEDURE**


- 6.1 From the left navigation bar, choose “Service Contracts > Search > Service Contracts.”
- 6.2 Enter the service contract number of the appropriate existing ZVMC contract in the Service Contract ID field and press the Enter key.
- 6.3 Click on the appropriate contract order from the Result List to view the order.
- 6.4 Click [Create Follow Up] and select one of the following:
  - 6.4.1 “Debit Memo” Order Type

**IMPORTANT NOTE:** Do NOT select any product to copy into the debit. Simply Click on the X in the upper right hand corner to close the box.



- 6.5 Select an Order Reason as required.
- 6.6 Enter the PO number and date of the customer purchase order received
- 6.7 Enter service product “VALUEADD” in the items section (should be the only line item on the order).
- 6.8 Select the existing contract number from the contract determination box.
- 6.9 Change the Line Item description to indicate the action being taken;



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6.10 Update the pricing to reflect the value to be added/ invoiced on the plan.

6.11 Release the order and click [Save].

Note: The order will replicate to ECC and need to be invoiced from the Billing Due List. The resulting invoice is then sent to the customer.

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

Required Record


**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.


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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: Service Administration

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**10 REVISION HISTORY & APPROVAL**

Revision History			
Rev	Description of Change	Author	Effective Date
A	Initial Release	M Bintliff	11/13/17

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