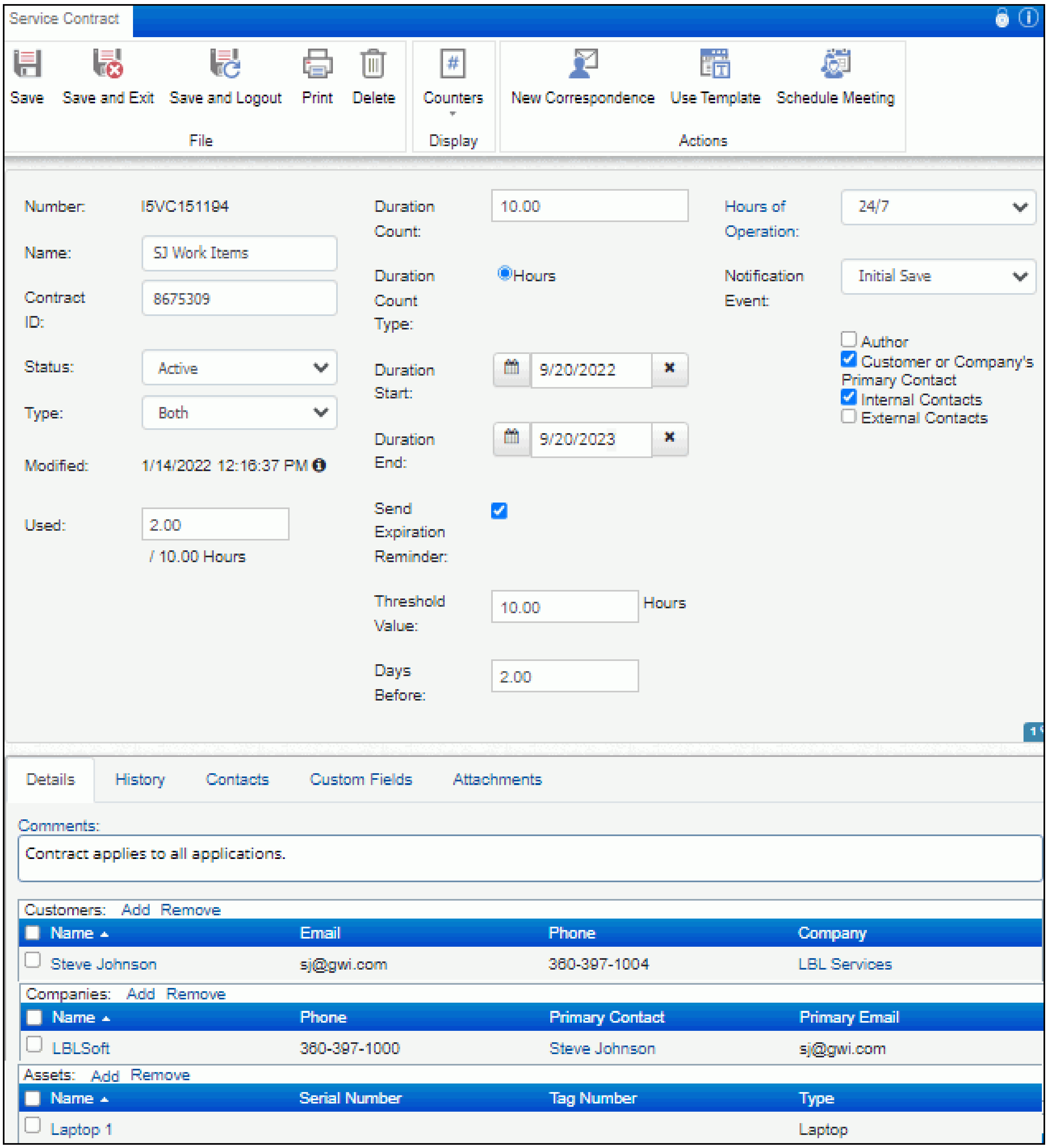
Using the iSupport® Service Contract Screen

You can access the Service Contract entry screen by clicking the Service Contract option on the Desktop action menu or by clicking the New link in the Service Contracts section in the Customer Profile, Company, and Asset screens. Use the upper portion of the screen to set up the basis of the contract, notifications, and customers, companies, and assets to assign to the contract.



<custom number label> ("Alt Number" in this example) - A custom number field may be configured; the number may be automatically generated or an entry field may be included. You may be required to complete this field in order to save the record. If configured, the field may be read-only after you enter the number and save the record.

Number - A number automatically generated by iSupport appears in this field.

Name - Enter a name for the service contract. This name will display for selection in the Incident or Change screen.

Contract ID - Enter an identifier for the contract. Your entry can include letters, numbers, and symbols.

Status - Select the contract status:

- Active - the contract is available for use with incidents and changes.
- Inactive - the contract is not available for use with incidents and changes.
- Suspended - the contract is not available for use with incidents and changes.
- Expired - Select this status to make the contract settings read-only. A service contract can be assigned this status automatically via the Service Contract agent; it checks all contracts for total counts and/or end dates/times and if the specified total count and/or end date/time is reached, the agent changes the status to an Expired status.

Type - Select the basis for the contract:

- Duration - a specified time frame (in days)
- Count - a specified number of hours or work items (incidents and/or changes)
- Both - a specified number of incidents and/or changes within a specified daily time frame

Used - This field appears if Count is selected in the Type field; it displays the number of incidents/changes and/or hours that have been counted against the contract. You can change this number if applicable.

Duration Count - Enter the maximum number of hours or incidents and changes allowed under the contract. Hours or incidents and/or changes are counted against a contract when the record is initially saved.

Duration Count Type - Select one of the following:

- Hours to base the contract on the number of hours entered for time worked on incidents and changes.
- Work Items to base the contract on the number of incidents and/or changes created for the associated customer, asset, or company. Then select Incidents, Changes, or both.

Duration Start - Enter the beginning date in the time frame in which incidents and/or changes are counted against the contract.

Duration End - Enter the end date in the time frame in which incidents and/or changes are counted against the contract.

Send Expiration Reminder - Select this checkbox to enable an Expiration Reminder notification to be sent when the contract is about to expire. The notification will be sent according to the value specified in the applicable Threshold Value or Days Before field. Recipients are specified in the Notification Event field.

Threshold Value - Enter the number of incidents and/or changes to be reached before triggering the Expiration Reminder notification to be sent.

Days Before - Enter the number of days before the Duration End date in which to trigger the Expiration Reminder notification to be sent.

Hours of Operation - Select the Hours of Operation definition that has the time frames in which the contract should be in effect; incidents and/or changes will be counted against the contract during the these time frames. Click the Hours of Operation link to display details on the selected definition. You can select the Default Hours of Operation or a definition created in configuration.

Notification Event - Select one or more of the following service contract events that will trigger a notification, and then select the recipient for those notifications. Settings in configuration will be used if nothing is selected in the Notification Event section in the Service Contract entry screen and no template is selected.

- Initial Save - a service contract is initially saved

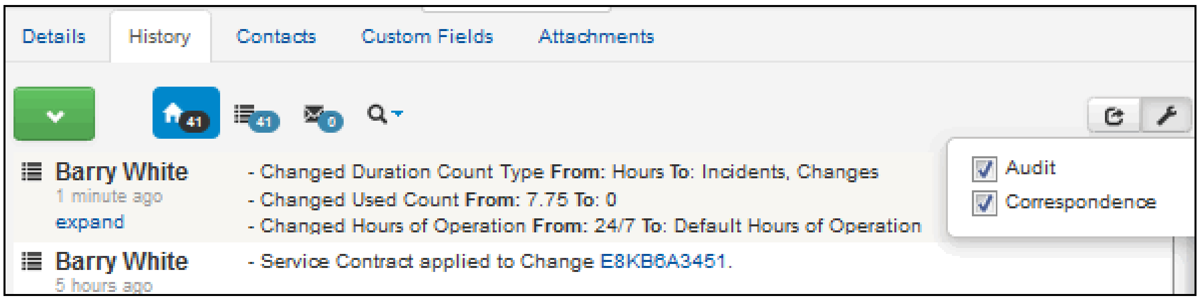
- Duration Change - an entry is made in the Duration fields for a service contract
- Contract Decremented - an incident or change is counted against a service contract
- Status Change - an entry is made in the Status field for a service contract
- Expiration Reminder - the contract is about to expire

Comments - Enter any comments or extra information regarding the contract.

Customers/Companies/Assets - Select the customers, companies, and/or assets to assign to the contract. When one of these is selected for an incident and/or change and the contract is within the specified duration and hours of operation, the contract count will be decremented. Note that service contracts can also be assigned via the Customer Profile, Company, and Asset entry screens.

Viewing History

Use the History tab to view notations on all service contract actions.



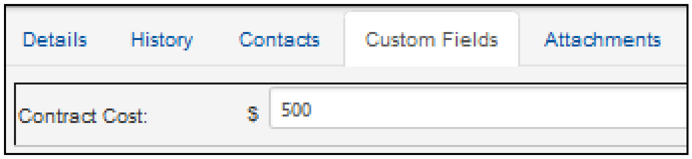
- The Feed option displays a list of all actions performed on the record; you can filter the content via the Settings icon.
- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes), as well as correspondence entries. Work history, chat, and approvals are not included.
- The Correspondence option displays entries for sent and received correspondence, including the subject line and body of the correspondence. The Correspondence Received and Correspondence Sent links display the Correspondence screen. Note that the Ref ID that appears on expanded correspondence entries is included for reference; it is used by iSupport's email processing engine.

Selecting Contacts

On the Contacts tab, select the customers, companies, and/or support representatives that can be designated as recipients for the Initial Save, Duration Change, Contract Decremented, Status Change, and Expiration Reminder notifications enabled in the Notification Event field on the Details tab.

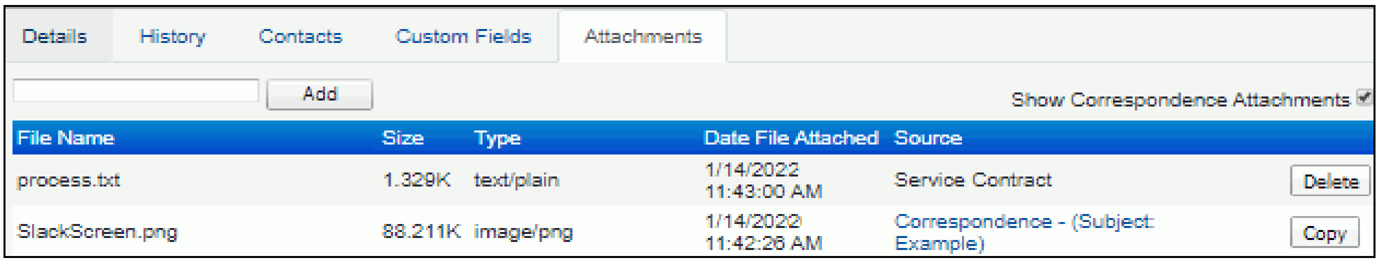
Completing Custom Fields

Custom fields may be configured for entering information specific to your company; entries may be required.



Attaching Files

To attach a file to the service contract, click the Add button in the Attachments field and select the file. You can select the Show Correspondence Attachments checkbox to display attachments from all sent or received correspondence (including attachments from an inbound email update) associated with the contract. A Copy button will be included next to correspondence attachments; you can use it to directly associate the attachment to the contract.



Sending an Email From a Service Contract

To send an email from the Service Contract screen, you can select New | Correspondence to populate the To field with the customer's email address.

Creating Microsoft Outlook/Google Calendar Meetings

If configured, a New Meeting icon will appear in the Service Contract screen for scheduling a Microsoft Office Outlook calendar and/or Google Calendar meeting. You can view the schedules of meeting attendees, create a meeting, and configure a notification to be sent to meeting attendees.

Using Service Contract Templates

Use templates for service contracts that are entered frequently. If configured, defaults may populate fields in the Service Contract screen. **To use a service contract template,** select Use Service Contract Template or select Service Contract | Use Service Contract Template.