

CHANGE REQUEST																									
Client Name		Date																							
Project Name		Version																							
Change Request #	Contract Line Quick Entry																								
Description of Change																									
<p>Description of Need: At the time of creating a Contract the user only knows the Item Number and Serial Number of the unit that needs to be added to the contract. To correctly add a new contract line the user needs to look elsewhere in GP to locate:</p> <ul style="list-style-type: none"> • The Equipment Record(s) contained in a Configuration: since the equipment may have originally been sold to a reseller, the configuration reference ties back to a sales transaction for a different customer, and the equipment is associated with that customer. However, the contract is with the end customer. The contract needs to cover all ERs in the Configuration. • Pricing: The pricing quoted may be for a different part number than the part number associated with the known serial number. This is due to the sale of redundant systems that have multiple serialized units in the system. The pricing is quoted for the redundant system part number but the individual unit part numbers will be entered on the contract line. These units have their own pricing which is individually higher than the total redundant unit price. <p>A method is required to facilitate quickly adding all equipment records in a configuration based on the selection of one piece of equipment in that configuration, changing the customer id associated with all ERs in the configuration, and overriding pricing if necessary.</p> <p>Description of Solution: The proposed solution is to provide a new window called Contract Line Quick Entry. This window will be accessed from the Extras menu on "Contract Maintenance – Lines" (Additional >> Contract Line Quick Entry). NOTE: the extras menu is on the Lines window rather than the Contract Entry window to ensure that all required fields have been entered for the contract, and that the contract has been saved (i.e. all of the logic that executes when you click the Contract Lines button).</p>																									
<div style="border: 1px solid black; padding: 5px;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> X Contract Line Quick Entry </div> <div style="padding: 5px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;"> Process Mark All Unmark All Clear </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <div>Contract Number <input type="text" value="002002"/></div> <div>Customer ID <input type="text" value="AARONFITZ001"/></div> <div>Length/Period <input type="text" value="2 YEARS"/></div> </div> <div style="display: flex; justify-content: space-between;"> <div>Price Book <input type="text" value="2004-C"/></div> <div>Name <input type="text" value="Aaron Fitz Electrical"/></div> <div>Start/End <input type="text" value="05/01/2009"/> <input type="text" value="04/30/2011"/></div> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>Add</th> <th>Price</th> <th>Unit Price</th> <th>Item Number <input type="text" value=""/></th> <th>Serial Number <input type="text" value=""/></th> <th>Config Ref</th> <th>Config Lvl</th> <th>Curr Cust ID</th> <th>Curr Addr ID</th> <th>Curr Contract</th> <th>Curr Exp</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <div style="margin-top: 5px;"> Sort By <input type="text" value="Configuration"/> </div> <div style="margin-top: 5px;"> <input type="checkbox"/> = Lookup Button </div> </div> </div>				Add	Price	Unit Price	Item Number <input type="text" value=""/>	Serial Number <input type="text" value=""/>	Config Ref	Config Lvl	Curr Cust ID	Curr Addr ID	Curr Contract	Curr Exp											
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Field	Function
Contract Number	Displays contract number from Contract Entry window
Price Book	Displays the Price Book ID from Contract Entry
Customer ID/Name	Displays the Customer ID and name from Contract Entry
Length/Period	Displays the Length and Period from Contract Entry
Start/End	Displays the contract start/end dates.
Add	Checkbox. Marked lines will be added to the Contract Lines. User may enter many items in the scrolling window, and mark only select lines to add to the contract. Marked by default.
Price	Checkbox. Auto-marked for the highest level item in the configuration (top level equipment record), otherwise it defaults to unmarked. If the box is not marked, and ADD is marked, the line will be included but with a \$0 price.
Unit Price	Calculated automatically based on the Price Book and selection Contract Option(s). All Price Book Options will be created with a fixed Price (rather than Percent). If multiple Options have been selected for the Contract, they will be added together to calculate the Unit Price (the Cumulative setting on the Option line is ignored).
Item Number	User can enter the Item Number or select on from a Lookup
Serial Number	<p>User can enter a Serial Number or select from a Lookup. If the Item Number is blank the system will attempt to retrieve a single equipment record based on the serial number. If more than one ER exists for the Serial Number, the Lookup window will open automatically displaying only the duplicate ER records with the given serial number.</p> <p>If the Item Number has been entered, the system will attempt to locate a single ER, and if more than one is found, the Lookup will open automatically displaying only ERs that have the same Item & Serial pair.</p> <p>If the Lookup is used and an Item Number has been entered, the Lookup will display only ERs for the Item Number. If no Item Number has been entered the Lookup will display all ERs.</p> <p>Selecting a record from the Lookup will populate both the Item Number and Serial Number.</p> <p>Once a unique ER is found:</p> <ul style="list-style-type: none"> • If the ER is not on a contract, it will be added to the scrolling window regardless of which Customer it belongs to. • If the ER is in a Configuration, and no ERs in the Configuration are on a contract, all ERs in the configuration will be added to the scrolling window regardless of which customer they belong to. • If the ER belongs to the customer, but is already on a different Contract, the user will be asked whether or not they want to include the item on the new contract • If any ER in a Configuration is on a Contract for a different customer, the existing line will be cleared, and a report will print showing all of the information that would

	have been added to the scrolling window (the ER, all items in the Configuration, the Configuration Reference, contract information, etc).
Config Ref	<p>After selecting an Item Number & Serial Number the system will identify an Equipment Record.</p> <p>It will then retrieve the configuration reference, and add all other ERs from the Configuration to the Quick Entry window. The Config Ref and Config Level. The current Customer ID and Address ID will be displayed. If the Equipment ID is found on another Contract, the Current Contract and Expiration Date will be displayed.</p>
Config Level	See Config Ref
Curr Cust ID	See Config Ref
Curr Addr ID	See Config Ref
Curr Contract	See Config Ref
Curr Exp	See Config Ref
PROCESS	Sends all "Add" marked lines to the Contract Lines, then refreshes the "Contract Maintenance – Lines" window. If necessary, ERs are reassigned to the new Customer ID & Address ID from the contract, and address details are updated.
MARK ALL	Marks the ADD checkbox for each line
UNMARK ALL	Unmarks the ADD checkbox for each line
CLEAR	Clears all lines from the scrolling window, but keeps the "header" information at the top of the window.
Sort By	Two options: Line, Configuration. When sorted by line the window displays records in the order they were entered. Configuration displays lines by Configuration Reference, Configuration Level, then Item Number.

Contract Line Invoice Records: preliminary testing found that the records shown in this window are automatically calculated by the Service module as Contract Lines are added. When the Quick Entry window inserts new contract lines, the Invoice Records should automatically recalculate.