

Epiphany's vast experience has allowed us to develop industry expertise and best practices for Verticals as well as specific Business Segments. As part of that experience we have developed **eContracts**, a **Software License, Warranty and Service Contract bundled module to augment NetSuite, saving you customization time and money.**

Product Overview

Epiphany's **eContracts** Bundle is offered as part of our services to provide an automated means to track Software Licenses, product warranties and service contracts within **NetSuite**. This Bundle was designed to provide you with a means to track product serial numbers, warranty start/end dates, and service contract start/end dates and renewals.

Software License/Warranty/Contract Management Features

- ✓ **Easily Track Contract Data Including:**
 - Contract Type (Warranty, Maintenance and T&M)
 - Start and End Dates
 - Items Covered by the Contract
 - Original Sales Order Data
 - Contract Status (Active, Future, Expired and Cancelled)
 - Cases related to the Contract are shown on the Case Tab

The screenshot displays the NetSuite eContracts interface. At the top, there is a navigation bar with 'Home > EC Contracts List >' and 'Partner Test Acct Five - Andy Andrews (Administrator)'. Below this is the 'EC Contracts' header with a 'Create New:' dropdown menu containing options like 'EC Warranty', 'Case', 'Note', 'File', 'Email', 'Letter', and 'PDF'. The main content area shows contract details for '51 AAA Test Customer, Sales Order # 32'. A red box highlights the 'Contract Detail' section, which includes: Contract Type: Maintenance, Support Type: Phone, Contract Status: Active, Start Date: 4/8/2008, End Date: 4/7/2009, Contract Renewed: No, and Reason for Cancellation. Below the contract details are buttons for 'Edit', 'New', 'Make Copy', and 'Print'. A yellow callout box points to the 'Case' tab, stating: 'Create a new Case or see all Cases for this item by clicking on the Case Tab located within the EC Contracts Record!'. At the bottom, the 'Sub-Contracts/Warranty' tab is selected, showing a table titled 'Detail of items covered under this Contract'. The table has columns for ID, Sales Order, Customer, Warranty Status, Item, Support Type, and Remove. It lists three items: a 60"x80" Cosmopolitan Electrol Tensioned Screen, and two Serial Inv Items.

ID	Sales Order	Customer	Warranty Status	Item	Support Type	Remove
1	Sales Order #32	51 AAA Test Customer	Active	60"x80" Cosmopolitan Electrol Tensioned Screen	Ship to Service Location	Remove
a0001	2 Sales Order #32	51 AAA Test Customer	Active	Serial Inv Item	Email	Remove
a0002	3 Sales Order #32	51 AAA Test Customer	Active	Serial Inv Item	Email	Remove

- ✓ **Stay on Top of Items Covered Under Contract.** With **eContracts** product serial numbers and warranty/service contract information is readily available when opening a new case. Your service center representatives can advise customers of their contract status before sending a technician to site. Keeping your service representatives and your customers informed will increase customer satisfaction and eliminate potential billing inquiries.

Home Activities Transactions Lists Reports Documents Setup HR Supervisor HR Mgt Support

Partner Test Acct Five - Andy Andrews (Administrator)

Case

Custom Form: EC Case Form

Subject: []

Number To Be Generated: []

Incident Date: 4/17/2008

Incident Time: 8:42 am

Company: 51 AAA Test Customer

Contact: []

Email(s): bbrinkley@epiphanyinc.biz

Phone: 123.456.7890

Product: []

Module: []

Item: []

Serial/Lot Number: []

Inbound Email Address: []

Case Issue: []

Status: Not Started

Inactive:

Priority: Medium

Origin: Phone

Type: Problem

Assigned To: David Andrews

Help Desk:

Copy Employees: Alu Alex, Andy Andrews, Betty Hilton, Bill Bates

Choose the product and serial number and the warranty/contract information automatically populates.

EC Item Purchased: 60"x80" Cosmopolit... AAA Test Customer

EC Item's Sub-Contract/Warranty: 60"x80" Cosmopolit...tem # 165, SO # 32

EC Item's Contract: 51 AAA Test Customer, Sales Order # 32

EC Contract's Status: Active

EC Sub-Contract's Start Date: 5/1/2008

EC Sub-Contract's End Date: 4/30/2009

Save Reset Purchase History Customize New Field

- ✓ **Ability to Create Software License, Warranty and Maintenance Contracts from the Sales Order**

✓ **For New contracts:**

- Each Sales Order allows you to indicate if a Contract should be created with a simple checkbox
- A Contract Record is created upon saving the Sales Order. This Contract Record includes the sales order information, item information and contract start and end dates.
- Notification is automatically sent to the Contracts Manager when a new contract is created.

✓ **For Existing contracts:**

- **eContracts** provides you with the ability to choose an existing Contract for each line item of a Sales Order. When the order is saved, the new item(s) and their respective start and end dates will be added to the Contract chosen.
- Contracts about to expire are shown on the Contracts Dashboard.

Sales Order Pending Approval

Customer: Job **S1 AAA Test Customer**
 Date: 4/8/2008
 Order # **32**
 Opportunity
 Department
 Class
 Location
 Terms
 Sales Rep

Partner
 Lead Source
 Billing Schedule
 Start Date
 End Date
 PO #
 Memo

EC Contract **S1 AAA Test Customer, Sales Order # 32**
 EC Contract Type **Maintenance**
 EC Support Type **Phone**
 EC Contract Start Date **4/8/2008**
 EC Contract End Date **4/7/2009**
 EC Contract Details
 EC Contract Created **Yes**

Check Yes to create a New Contract.

EC Create Contract **Yes**

Total (Alt. Sales) 0.00 Subtotal **999.00** Discount Total **999.00**

Print Email Show Activity

Items Address Shipping Payment Messages History Custom Milestones

Contract information can be entered on the line level by item.

Item	Quantity	Units	Description	Serial/Lot Numbers	Price Level	Rate	Amount	Options	Create PO	EC Contract	EC Include Item in Contract	EC Sub-Contract Start Date	EC Sub-Contract End Date	EC Product Category (Item)	EC Support Type (Item)	EC Added To Contract	History
60"x80" Cosmopolitan Electrol Tensioned Screen	1		60"x80" Cosmopolitan Electrol Tensioned Screen		Base Price	799.00	799.00		Special Order	S1 AAA Test Customer, Sales Order # 32	Yes	5/1/2008	4/30/2009	Category 1	Ship to Service Location	Yes	History
Serial Inv Item	2			a0001 a0002	Base Price	100.00	200.00			S1 AAA Test Customer, Sales Order # 32	Yes			Category 1	Email	Yes	History

Is Time Running Out? Do you know when your warranties and contracts expire?

✓ Manage Renewals via a Contract Dashboard

- Quickly see Licenses, Warranties and Contracts about to Expire
 - Proactively convert warranties to contracts
 - Present your customers with license/contract renewals before they expire
- View New Contracts
- Contract Additions/Modifications including:
 - Creation of a Sales Order with co-terminious end date
 - Creation of an Opportunity from the Contract to easily provide your customer a quote for year-end Budget purposes

✓ Up sell New Equipment/Software

- Reporting based on original equipment/software purchase date provides you with a quick view of obsolete items

NETSUITE®

Change Role | Sign Out | Help | Global Search

Home Activities **eContracts** eSM Transactions Lists Reports Documents Setup HR Mgt Support

Partner Test Acct Five - Andy Andrews (Administrator)

Create New: Event Phone Call Task Customer Contact Opportunity Sales Order Cash Sale Invoice Bill Case

October 2008

Today: October 28, 2008

Sun Mon Tue Wed Thu Fri Sat

28 29 30 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31 1

eContracts Links

eContracts
 EC Warranty/Maintenance Items New Search
 EC_Contracts New Search
 EC_Contract Items New Search

Sales Orders
 Sales Orders New Search
 Sales Order with Contract Yes and Created No Results Customize

Opportunities
 Opportunities New Search
 Contract Renewal Opp Not Completed Results Customize

Contracts End Dates:

New	Edit	View	Name ^	ID	Sales Order	Customer	Start Date	End Date	Term
	Edit	View	5 Wisconsin Sales Sales Order #61	1467	Sales Order #61	5 Wisconsin Sales	8/18/2008	8/17/2009	Year - 1
	Edit	View	5 Wisconsin Sales Sales Order #62	1468	Sales Order #62	5 Wisconsin Sales	5/18/2007	5/17/2009	Year - 2
	Edit	View	5 Wisconsin Sales Sales Order #64	1470	Sales Order #64	5 Wisconsin Sales	12/30/2008	12/29/2010	Year - 2
	Edit	View	58 Citigroup Sales Order #59	1447	Sales Order #59	58 Citigroup	10/15/2008	5/15/2009	Year - 1
	Edit	View	58 Citigroup Sales Order #59	1449	Sales Order #59	58 Citigroup	10/15/2008	5/15/2009	Year - 1
	Edit	View	58 Citigroup Sales Order #59	1456	Sales Order #59	58 Citigroup	10/15/2008	5/15/2009	Year - 1
	Edit	View	8 Mike Valentine Sales Order #48	755	Sales Order #48	8 Mike Valentine	7/31/2008	7/31/2010	Year - 2
	Edit	View	8 Mike Valentine Sales Order #49	769	Sales Order #49	8 Mike Valentine	7/23/2008	7/23/2010	Year - 2
	Edit	View	8 Mike Valentine Sales Order #57	1442	Sales Order #57	8 Mike Valentine	8/1/2010	7/31/2012	Year - 2
	Edit	View	8 Mike Valentine Sales Order #57	1443	Sales Order #57	8 Mike Valentine	8/1/2010	7/31/2012	Year - 2

Customer: All - Contract End Date (DO): all

From-To: 5 - 8 Mike Valentine Total Found: 16

Refresh Set Up Edit

Contract Renewal Opp Not Completed:

New	Edit	View	Title	Number	Customer	Sales Rep	Date	Expected Close ^	Opportunity Status
	Edit	View		31	58 Citigroup	Duane Tharp	10/22/2008	10/22/2008	Closed Won
	Edit	View		32	5 Wisconsin Sales		10/27/2008	10/27/2008	Closed Won
	Edit	View		33	5 Wisconsin Sales		10/27/2008	10/27/2008	In Discussion
	Edit	View		29	8 Mike Valentine		9/15/2008	7/24/2010	Identified Decision Makers

Sales Rep: All - Est Contract Start Date: all

Total Found: 4

Refresh Set Up Edit Quick Add

Sales Order with Contract Yes and Created No:

Edit	View	Date ^	Number	Name	Status	Memo	EC Create Contract	Amount
Edit	View	5/27/2008	38	51 AAA Test Customer	Pending Approval		Yes	2,618.00
Edit	View	5/29/2008	39	51 AAA Test Customer	Pending Approval		Yes	1,010.88
Edit	View	6/3/2008	40	51 AAA Test Customer	Pending Approval		Yes	2,217.10
Edit	View	6/12/2008	41	6 All Around Electrical	Pending Fulfillment		Yes	2,549.43
Edit	View	6/18/2008	42	6 All Around Electrical	Pending Fulfillment		Yes	2,549.43
Edit	View	9/15/2008	52	51 AAA Test Customer	Pending Approval		Yes	23.23
Edit	View	9/15/2008	53	51 AAA Test Customer	Pending Approval		Yes	5.05
Edit	View	9/15/2008	54	8:1 Mike Valentine : Austin Site	Pending Approval		Yes	2,000.00
Edit	View	10/10/2008	56	8:1 Mike Valentine : Austin Site	Pending Billing		Yes	145.00
Edit	View	10/21/2008	58	51 AAA Test Customer	Pending Fulfillment		Yes	1,524.09

Date: all

Total Found: 10

Refresh Set Up Edit

Sales Order with Contract Created:

Contracts Items Not Fulfilled:

Sales Order with Create Contract No:

Open Sales Orders:

Custom EC Contracts Default View:

eContracts allows you to maintain a fully searchable history by serial number, contract type and contract expiration dates.

Managing Software Licenses, Warranties and Maintenance Contracts in NetSuite has never been easier! Contact us for pricing information.

The Epiphany Difference

At Epiphany, we focus on business process improvement – not technology. With a highly qualified staff of Senior Business Analysts, Programmers and Certified Project Management Professionals, **our employees have the skill sets required to assist you in maximizing your NetSuite investment.**

FOR MORE INFORMATION ABOUT EPIPHANY CALL US AT 713-589-4725
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