

Case processing

Service agreement selection

Version 8.0



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PRODUCTS: **SERVICE ENTERPRISE**

The service agreements are available in Service Creatio, enterprise edition. Creatio selects applicable service agreement automatically, based on the values in the [*Contact*] and [*Account*] fields. Only active service agreements whose expiration date exceeds or is equal to the current date can be selected. Service agreements in the statuses that are marked as [*Active*] in the [*Service agreement statuses*] lookup are considered open.

The list of agreements available for selection depends on the values in the [*Contact*] and the [*Account*] fields of the case page, as well as on information on the [*Service recipients*] detail that is located on the [*Contract provisions*] tab on the service agreement page. The list of service agreements will display only the ones that have the specified contact and/or account added to the [*Service recipients*] detail. So the field is filled in with one of the agreements according to the following priorities:

1. If the [*Contact*] field is filled in, the [*Service agreement*] field fills in with the agreement that meets one of the requirements:
 - a. A contact specified on the case page is found on the [*Service recipients*] detail of the service agreement.
 - b. A department of the account that the specified contact is connected to is found on the [*Service recipients*] detail of the agreement.
 - c. An account that the specified contact is connected to is found on the [*Service recipients*] detail of the agreement.
2. If the [*Contact*] field is empty and the [*Account*] field is filled in, the [*Service agreement*] field will be filled in with the one that has the specified account added to the [*Service recipient*] detail.
3. If no service agreements meet the required conditions, the [*Service agreement*] field is filled in with the base service agreement. The base service agreement provides the minimum number of services. You can set it up using the "Default service agreement" system setting.

If several service agreements meet the required conditions, the one with the higher priority will be specified in the [*Service agreement*] field. The rest of the service agreements are available in the list. If multiple service agreements apply to the case, the following is selected as the primary agreement:

1. Contact's service agreement (the contact is specified on the [*Service objects*] detail of the service agreement).
2. The service agreement of the contact's department.
3. The account's service agreement.

When you change the value in the [*Contact*], [*Account*] or any other field that govern the process of selecting a service agreement, the list of available service agreements is reconsidered.

Note. Information about the account and department that the contact is connected to can be found on the contact page. The portal user's account and department are specified on the [*Service objects*] detail.

The [*Service agreement*] field is available for editing at any case processing stage.