

Service agreements

Manage service agreements

Version 8.0



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Manage service agreements

PRODUCTS: **SERVICE ENTERPRISE**

Creatio implements the "Service level management" ITSM process in the [*Service agreements*] section. Use this section to determine the customer service requirements, manage your agreements, and in-house service agreements. For each agreement, you can define the individual terms of service and view the statistics.

Add service agreements

To add a new service agreement:

1. Open the [*Service agreements*] section and click [*New*] in the section list.
2. Populate the service agreement page:

Title	Name of the service agreement. By default, it consists of the service agreement number and the name of the account: "24 - Axiom".
Number	Service agreement number. Creatio automatically generates numbers according to the pattern specified in the "Service agreement current number" (ServicePactLastNumber) system setting. This is a non-editable field.
Type	Type of service agreement: <ul style="list-style-type: none"> • SLA - service level agreement. This type is used to define the service parameters for the end-users. • OLA - operational level agreement. This type is used to indicate the internal service agreements of your company. For example, the agreements between departments or employee groups. • UC - underpinning contract. These are the agreements between your company and its suppliers. If you select the "UC" type on the [<i>Contract provisions</i>] tab, additional fields will be available to enter information about the service provider.
Status	Current status of the service agreement, for example, "Draft" or "Active".
Start/End	The start and end dates of the service agreement validity.
Owner	Name of the user responsible for managing and updating information about the service agreement.
Calendar	The calendar that determines workdays and business hours of the support team. Creatio uses calendars to calculate the response and resolution time for service-related cases. By default, the field is populated with the value specified in the "Base calendar" (BaseCalendar) system setting. Use the [<i>Calendars</i>] lookup to set up custom calendars.
Support level	The support package that is provided according to the service agreement. Creatio calculates the response and resolution deadline values based on the support level.

3. On the [*Contract provisions*] tab, populate information about the [service objects](#) and [services](#).
4. On the [*Attachments and notes*] tab, enter additional information about the service agreement and related links to web resources. For example, attach a photocopy of the signed agreement. Read more >>>
5. Click [*Save*] to save the service agreement.

As a result, the new service agreement record with the specified parameters will appear in the list of the [*Service agreements*] section.

Default service agreement

In addition to the agreements with the specific service consumers, the [*Service agreements*] section must include an agreement that includes the minimum set of services, provided to any consumer i.g., a "default service agreement."


This agreement can be used to obtain customer support service when no appropriate service agreement is found for a particular case.

The default service agreement should be specified in the “Default service agreement” (DefaultServicePact) system setting.

Add service objects to SLA

Information about the service objects is represented on the [*Service recipients*] detail of the service agreement page.

To specify service objects for a service agreement:

1. Open the [*Service agreements*] section, select the needed record and click [*Open*].
2. Add accounts and contacts to the [*Service recipients*] detail:
 - a. Click **+** → [*Account*] or [*Contact*].
 - b. In the window that opens, select the needed account or contact and click [*Select*].
3. Add departments of the service recipient accounts, if only specific departments can use this service level:
 - a. Select an account under [*Service recipients*], then click  → [*Select department*].
 - b. In the window that opens, select the departments that will receive services under the service agreement → click [*Select*].
4. Click [*Save*] on the service agreement page.

As a result:

- Creatio will use the information on the [*Service recipients*] detail when [selecting a service agreement](#) on the [case page](#).
- If you added departments, a record for each selected department will appear on the [*Service recipients*] detail. The service agreement will be valid for the selected departments only.

Add services to SLA

Set up a list of services provided under a service agreement on the [*Services*] detail of the service agreement page.


To add a service to a service agreement:

1. Open the [*Service agreements*] section, select the needed record and click [*Open*].
2. Go to [*Contract provisions*] → [*Services*] → click **+**. A lookup window opens, displaying a list of all services from the [\[*Services* \] section](#).
3. Select the services provided under this service agreement and click [*Select*].

As a result, the service(s) will be added to the [*Services*] detail list with the default terms of service provision.

Modify service provision terms in SLA

Services are added to the service agreements with their default terms of provision: calendars, response, and resolution deadlines. You can modify the terms within the framework of a specific SLA:

1. Open the [*Service agreements*] section, select the needed record and click [*Open*].
2. Select a service on the [*Services*] detail, click  → [*Edit*]. A [*Service in service contract*] page opens.
3. Specify the service provisions within the selected service agreement:

Service	Name of service provided under the selected agreement. It is defined after adding the service to the agreement. This is a non-editable field.
Response time	Estimated response and resolution time used for processing service-related cases under the corresponding service agreement. By default, the fields are populated with the response and resolution time values specified on the service page of the [Services] section . However, you can set other values for the selected service. Creatio will use the entered data to calculate the response and resolution time values for cases under the selected service agreement.
Resolution time	
Status	Status of the service provided under the selected service agreement.
Calendar	The calendar that is used for providing services under the selected service agreement. If this field is empty, Creatio will calculate the case-related response and resolution time values using the calendar specified in the [<i>Calendar</i>] field of the service agreement page.

4. Click [*Save*].

As a result, Creatio will use the information of the [*Services*] detail when selecting customer service provisions and [calculating the response and resolution time](#) for cases.

Set service providers for UC

If you add an “Underpinning contract” in the [*Service agreements*] section by selecting “UC” on the [*Type*] field, additional fields for entering information on the subcontractor service provider become available in a separate [*Service provider*] group on the [*Contract provisions*] tab of the service agreement page:

- Populate the **Service provider** → **Account** field by specifying the company that provides services under the corresponding service agreement. If you populate the [*Contact*] field, the [*Account*] field will be automatically populated with the account specified on the page of the selected agreement.
- Populate the **Service provider** → **Contact** field by specifying the contact person of the supplier that you work with under the agreement. If you populate the [*Account*] field, the contact lookup will contain contacts of the selected company only.