



Renewal Management Lite Use Case

Installed Base Products

Last updated: Aug 2012

Contents:

Scenario # 1 – New Customer, New Order, Service Contract Disabled	3
Scenario # 2 – Existing Customer, New Order, Co-Term, Service Contract Disabled	16
Scenario # 3 – New Customer, New Order, Service Contract Enabled	19
Scenario # 4 – Existing Customer, New Order, Co-Term, Service Contract Enabled	32

B Renewal Management Lite Use Case – Installed Base Products

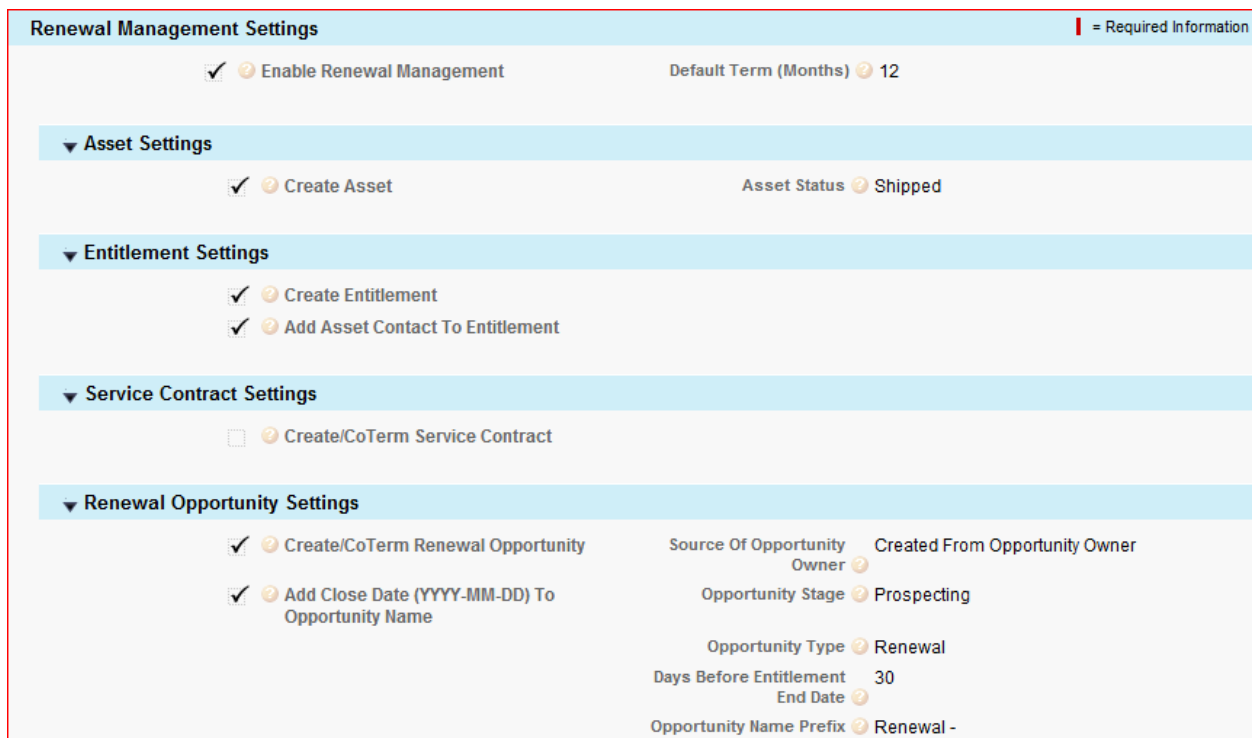
Scenario # 1 – New Customer, New Order, Service Contract Disabled

A Network Device company provides network solution for enterprises and data centers around the globe. Their solution includes hardware devices (Chassis, Modules, Accessories, etc.) and software for virtual network management. All hardware sold by this company comes with Hardware Warranty (Note: the “Warranty Start Date” is the Product “Ship Date”) and 1 year free standard support if the customer purchases a Chassis. Now this company wants to use “Renewal Management Enterprise” to create “Assets”, “Entitlements” and “Renewal Opportunities” based on the Opportunity Product Line Items in their Opportunities.

- How should the Renewal Management Administrator configure “Renewal Management Enterprise” Application to support this scenario?
- How should the Renewal Management Administrator configure the Renewal Management Settings in their Products?
- On 6/1/2012, a new customer wants to order 1 x Chassis, 2 x Modules, 4 x Accessories plus 2 more years of standard support, how should the Sales/Renewal rep configure the Renewal Management Settings in Opportunity?

Solution - Part I (Done by the Renewal Management Administrator)

- **Renewal Management Application Level Configuration**
 - Login as Renewal Management Administrator (see the installation guide for how to set up the “Renewal Management Administrator” profile).
 - Go to **Your Name > Setup > App Setup > Deploy > Installed Packages > Renewal Management Enterprise > Configure**
 - Since “Service Contract” is not required for Scenario # 1, the Renewal Management Administrator only needs to enable “Asset”, “Entitlement” and “Renewal Opportunity” settings at the Application level, see the screenshot below for the example.
 - Read the inline help  for the definition of each field.



Renewal Management Settings		= Required Information	
☒ 	Enable Renewal Management	Default Term (Months) 	12
▼ Asset Settings			
☒ 	Create Asset	Asset Status 	Shipped
▼ Entitlement Settings			
☒ 	Create Entitlement		
☒ 	Add Asset Contact To Entitlement		
▼ Service Contract Settings			
☐ 	Create/CoTerm Service Contract		
▼ Renewal Opportunity Settings			
☒ 	Create/CoTerm Renewal Opportunity	Source Of Opportunity 	Created From Opportunity Owner 
☒ 	Add Close Date (YYYY-MM-DD) To Opportunity Name	Opportunity Stage 	Prospecting
		Opportunity Type 	Renewal
		Days Before Entitlement End Date 	30
		Opportunity Name Prefix 	Renewal -



Renewal Management Lite Use Case – Installed Base Products

- Create “Chassis” Product and configure its Renewal Management Settings
 - Follow the screenshot below and create the “Chassis” Product.
 - Read the help  for the definition of the Renewal Management fields.
 - Add “3-Year Hardware Warranty” Entitlement Template to this Product.

▼ Product Information					
Product Name	Chassis				
Product Code					
Created By	John Smith, 6/3/2012 11:08 PM				
Last Modified By	John Smith, 7/9/2012 6:43 PM				
Product Description					
▼ Renewal Management Information - Asset Settings					
Create Asset 	☒				
Link Asset to Service Contract 	☐				
▼ Renewal Management Information - Entitlement Settings					
Create Entitlement 	☒				
Link Entitlement to Service Contract 	☐				
▼ Renewal Management Information - Service Contract Settings					
Add as Line Item to Service Contract 	☐				
▼ Renewal Management Information - Renewal Opportunity Settings					
Add as Line Item to Renewal Opportunity 	☐				
Entitlement Templates Add Entitlement Template					
Action	Entitlement Template Name	Type	Term (Days)	Entitlement Process Name	Business Hours Name
Remove	3-Year Hardware Warranty	Standard Support	1,095	Standard Support Entitlement Process	Standard Support Business Hours

- “3-Year Hardware Warranty” Entitlement Template Detail
 - To create this Entitlement Template, go to **Your Name > Setup > App Setup > Customize > Entitlement Management > Entitlements > Templates**
 - Set the “Term (Days)” to 1095 since this is a fixed term hardware warranty.
 - Entitlement Process and Business Hours are **NOT** required for the Renewal Management Application.



Renewal Management Lite Use Case – Installed Base Products

Entitlement Template Detail		Edit	Delete	Clone
Entitlement Template Name	3-Year Hardware Warranty		Type	Standard Support
Term (Days)	1,095			
Entitlement Process	Standard Support Entitlement Process			
Per Incident	☐			
Cases Per Entitlement				
Business Hours	Standard Support Business Hours			
Created By	John Smith , 6/3/2012 11:15 PM		Last Modified By	John Smith , 7/9/2012 6:45 PM

- **Create “Module” Product and configure its Renewal Management Settings**
 - Follow the screenshot below and create the “Module” Product.
 - Add “1-Year Hardware Warranty” Entitlement Template to this Product.

▼ Product Information	
Product Name	Module Active ☒
Product Code	Product Family
Created By	John Smith , 6/4/2012 4:01 PM Last Modified By John Smith, 7/9/2012 6:50 PM
Product Description	1 Year Hardware Warranty

▼ Renewal Management Information - Asset Settings	
Create Asset	☒ Create One Asset Record Per Quantity
Link Asset to Service Contract	☐

▼ Renewal Management Information - Entitlement Settings	
Create Entitlement	☒ Convert Term (Days) to Term (Months)
Link Entitlement to Service Contract	☐ No Override On Template Term

▼ Renewal Management Information - Service Contract Settings	
Add as Line Item to Service Contract	☐

▼ Renewal Management Information - Renewal Opportunity Settings	
Add as Line Item to Renewal Opportunity	☐ Renew With (The Same Product)
	☐ Renew With (A Different Product)

Entitlement Templates		Add Entitlement Template			
Action	Entitlement Template Name	Type	Term (Days)	Entitlement Process Name	Business Hours Name
Remove	1-Year Hardware Warranty	Standard Support	365	Standard Support Entitlement Process	Standard Support Business Hours



Renewal Management Lite Use Case – Installed Base Products

- “1-Year Hardware Warranty” Entitlement Template Detail
 - Set the “Term (Days)” to 365 since this is a fixed term hardware warranty.

Entitlement Template Detail		Edit	Delete	Clone
Entitlement Template Name	1-Year Hardware Warranty		Type	Standard Support
Term (Days)	365			
Entitlement Process	Standard Support Entitlement Process			
Per Incident	☐			
Cases Per Entitlement				
Business Hours	Standard Support Business Hours			
Created By	Admin Dev , 5/27/2012 6:15 PM		Last Modified By	John Smith , 7/9/2012 6:45 PM

- Create “Accessory” Product and configure its Renewal Management Settings
 - Follow the screenshot below and create the “Accessory” Product.
 - Add “90-Day Hardware Warranty” Entitlement Template to this Product.

▼ Product Information	
Product Name	Accessory
Product Code	Active ☒
Created By	John Smith , 6/4/2012 4:02 PM
Last Modified By	John Smith , 7/9/2012 6:57 PM
Product Description	

▼ Renewal Management Information - Asset Settings	
Create Asset	☒
Create One Asset Record Per Quantity	☐
Link Asset to Service Contract	☐

▼ Renewal Management Information - Entitlement Settings	
Create Entitlement	☒
Convert Term (Days) to Term (Months)	☐
Link Entitlement to Service Contract	☐
No Override On Template Term	☒

▼ Renewal Management Information - Service Contract Settings	
Add as Line Item to Service Contract	☐

▼ Renewal Management Information - Renewal Opportunity Settings	
Add as Line Item to Renewal Opportunity	☐
Renew With (The Same Product)	☐
Renew With (A Different Product)	☐

Entitlement Templates		Add Entitlement Template			
Action	Entitlement Template Name	Type	Term (Days)	Entitlement Process Name	Business Hours Name
Remove	90-Day Hardware Warranty	Standard Support	90	Standard Support Entitlement Process	Standard Support Business Hours



Renewal Management Lite Use Case – Installed Base Products

- “90-Day Hardware Warranty” Entitlement Template Detail
 - Set the “Term (Days)” to 90 since this is a fixed term hardware warranty.

Entitlement Template Detail		Edit	Delete	Clone
Entitlement Template Name	90-Day Hardware Warranty	Type	Standard Support	
Term (Days)	90			
Entitlement Process	Standard Support Entitlement Process			
Per Incident	☐			
Cases Per Entitlement				
Business Hours	Standard Support Business Hours			
Created By	John Smith , 6/4/2012 4:16 PM	Last Modified By	John Smith , 7/9/2012 6:46 PM	

- Create “Standard Support” Product and configure its Renewal Management Settings
 - Follow the screenshot below and create the “Standard Support” Product.
 - Since “Standard Support” is a Product for the new orders only, another Product “Standard Support – Renewal” needs to be created and set as the “Renewal With (A Different Product)” in this Product. **(Note: Both products must be added to the same Price Books)**
 - Add “Standard Support” Entitlement Template to this Product.

▼ Product Information	
Product Name	Standard Support
Product Code	Product Family
Created By	John Smith , 6/4/2012 9:38 PM
Last Modified By	John Smith , 7/9/2012 7:07 PM
Product Description	
▼ Renewal Management Information - Asset Settings	
Create Asset	☐
Create One Asset Record Per Quantity	☐
Link Asset to Service Contract	☐
▼ Renewal Management Information - Entitlement Settings	
Create Entitlement	☒
Convert Term (Days) to Term (Months)	☒
Link Entitlement to Service Contract	☐
No Override On Template Term	☐
▼ Renewal Management Information - Service Contract Settings	
Add as Line Item to Service Contract	☐
▼ Renewal Management Information - Renewal Opportunity Settings	
Add as Line Item to Renewal Opportunity	☒
Renew With (The Same Product)	☐
Renew With (A Different Product)	Standard Support - Renewal



Renewal Management Lite Use Case – Installed Base Products

Entitlement Templates Add Entitlement Template					
Action	Entitlement Template Name	Type	Term (Days)	Entitlement Process Name	Business Hours Name
Remove	Standard Support	Standard Support	365	Standard Support Entitlement Process	Standard Support Business Hours

- “Standard Support” Entitlement Template Detail
 - Set the “Term (Days)” to 365.

Entitlement Template Detail		Edit	Delete	Clone		
Entitlement Template Name	Standard Support	Type	Standard Support			
Term (Days)	365					
Entitlement Process	Standard Support Entitlement Process					
Per Incident	☐					
Cases Per Entitlement						
Business Hours	Standard Support Business Hours					
Created By	John Smith , 6/4/2012 9:41 PM	Last Modified By	John Smith , 7/9/2012 7:07 PM			

Solution - Part II (Done by the Sales/Renewal Rep)

- Create an Opportunity and configure its Renewal Management settings
 - Renewal Management Administrator needs to add a “Renewal Management Information” section to Sales/Renewal Rep’s Opportunity Page Layout and set the field level security of each Renewal Management field to “Visible” before the Reps can start using Renewal Management in their opportunities, see the screenshot below for the example.
 - Renewal Management Information section in the **Opportunity** Page Layout

Renewal Management Information	
Run Renewal Management ☐	Reset Renewal Management ☐
Asset Contact	Entitlement Start Date [7/9/2012]
Asset Ship Date [7/9/2012]	Entitlement End Date [7/9/2012]
CoTerm With Existing Renewal Opportunity	Entitlement Term (Months)



Renewal Management Lite Use Case – Installed Base Products

- Renewal Management Information section in the **Opportunity Product** Page Layout

Renewal Management Information

Asset Serial Number

Entitlement Start Date [7/9/2012]

Asset Ship Date [7/9/2012]

Entitlement End Date [7/9/2012]

Not A Renewal Opportunity Line Item ☐

Entitlement Term (Months)

Created From Opportunity

- The Sales/Renewal Rep should follow the screenshot below and create the opportunity.

▼ Opportunity Information

Opportunity Owner	Install Dev [Change]	Amount	\$24,000.00
Private	☐	Expected Revenue	\$24,000.00
Opportunity Name	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Close Date	6/1/2012
Account Name	BoonPlus	Stage	Closed Won
Type		Probability (%)	100%
Created By	Install Dev , 6/4/2012 10:29 PM	Last Modified By	Install Dev , 7/9/2012 7:16 PM

- Add products to this opportunity.
- For the 1st Year free Standard Support, check “Not A Renewal Opportunity Product Line Item” checkbox in the Opportunity Product record.
- For the 2nd, 3rd Year paid Standard Support, set the Entitlement Start Date to “6/1/2013” and Entitlement Term (Months) to “24” in the Opportunity Product record.

Products (Price Book A) [Add Product](#) [Edit All](#) [Choose Price Book](#) [Products \(Price Book A\) Help](#)

[Sort](#)

Action	Product	Sales Price	Quantity	Total Price	Line Description
Edit Del	Accessory	\$500.00	4.00	\$2,000.00	90 Days Hardware Warranty
Edit Del	Chassis	\$10,000.00	1.00	\$10,000.00	3 Year Hardware Warranty
Edit Del	Module	\$4,000.00	2.00	\$8,000.00	1 Year Hardware Warranty
Edit Del	Standard Support	\$0.00	1.00	\$0.00	1st Year free Standard Support
Edit Del	Standard Support	\$4,000.00	1.00	\$4,000.00	2nd, 3rd Year paid Standard Support



Renewal Management Lite Use Case – Installed Base Products

- Configure the Renewal Management settings and Save.

▼ Renewal Management Information	
Run Renewal Management	Reset Renewal Management
Asset Contact John Bond	Entitlement Start Date 6/1/2012
Asset Ship Date 6/1/2012	Entitlement End Date
CoTerm With Existing Renewal Opportunity	Entitlement Term (Months)

Results

- New records created by “Renewal Management”
 - 4 x Assets.
 - 6 x Entitlements.
 - 1 x Renewal Opportunity.
 - 1 x Renewal Opportunity Product.

Note: Renewal Management Administrator can add the following related lists (Assets, Entitlements, Renewal Opportunities & Renewal Opportunity Products) to Sales/Renewal Rep’s Opportunity page layouts.

Assets New Asset Assets Help ?					
Action	Asset Name	Account Name	Contact Name	Product Name	Ship Date
Edit Del	Accessory	BoonPlus	John Bond	Accessory	6/1/2012
Edit Del	Chassis	BoonPlus	John Bond	Chassis	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012

Entitlements Entitlements Help ?								
Action	Entitlement Name	Asset Name	Account Name	Product	Start Date	End Date	Status	Status Icon
Create Case	1-Year Hardware Warranty	Module	BoonPlus	Module	6/1/2012	5/31/2013	Active	
Create Case	1-Year Hardware Warranty	Module	BoonPlus	Module	6/1/2012	5/31/2013	Active	
Create Case	3-Year Hardware Warranty	Chassis	BoonPlus	Chassis	6/1/2012	5/31/2015	Active	
Create Case	90-Day Hardware Warranty	Accessory	BoonPlus	Accessory	6/1/2012	8/29/2012	Active	
Create Case	Standard Support		BoonPlus	Standard Support	6/1/2012	5/31/2013	Active	
Show 1 more » Go to list (6) »								



Renewal Management Lite Use Case – Installed Base Products

Renewal Opportunities [New Opportunity](#) [Renewal Opportunities Help ?](#)

Action	Opportunity Name	Account Name	Close Date	Amount	Stage
Edit Del	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	BoonPlus	5/1/2015	\$4,000.00	Prospecting

Renewal Opportunity Products [Renewal Opportunity Products Help ?](#)

Action	Renewal Opportunity Name	Product	Sales Price	Quantity	Total Price
Edit Del	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Standard Support - Renewal	\$4,000.00	1.00	\$4,000.00

▪ “Chassis” Asset

Asset Detail [Edit](#) [Delete](#) [Clone](#)

Asset Name	Chassis	Status	Shipped
Serial Number		Quantity	1.00
Account	BoonPlus	Price	\$10,000
Contact	John Bond	Purchase Date	
Product	Chassis	Install Date	
Product Code		Usage End Date	
		Competitor Asset	☐
Created By	Install Dev, 7/9/2012 7:24 PM	Last Modified By	Install Dev, 7/9/2012 7:24 PM
Description			

▼ Renewal Management Information

Created From Opportunity ?	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link ?	https://na12.salesforce.com/00kU00000003Kbg0IAC
Service Contract ?		Ship Date ?	6/1/2012



Renewal Management Lite Use Case – Installed Base Products

- 2 x “Module” Assets

Asset Detail		Edit	Delete	Clone
Asset Name	Module	Status	Shipped	
Serial Number		Quantity	1.00	
Account	BoonPlus	Price	\$4,000	
Contact	John Bond	Purchase Date		
Product	Module	Install Date		
Product Code		Usage End Date		
		Competitor Asset	☐	
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 7:24 PM	
Description				
▼ Renewal Management Information				
Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003Ke4XIAS	
Service Contract		Ship Date	6/1/2012	

- “Accessory” Asset

Asset Detail		Edit	Delete	Clone
Asset Name	Accessory	Status	Shipped	
Serial Number		Quantity	4.00	
Account	BoonPlus	Price	\$2,000	
Contact	John Bond	Purchase Date		
Product	Accessory	Install Date		
Product Code		Usage End Date		
		Competitor Asset	☐	
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 7:24 PM	
Description				
▼ Renewal Management Information				
Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003KbfzIAC	
Service Contract		Ship Date	6/1/2012	



Renewal Management Lite Use Case – Installed Base Products

- “3-Year Hardware Warranty” Entitlement for “Chassis” Asset

Entitlement Detail			
Entitlement Name	3-Year Hardware Warranty	Status	Active
Type	Standard Support	Status Icon	
Account Name	BoonPlus	Start Date	6/1/2012
Service Contract		End Date	5/31/2015
Contract Line Item		Business Hours	Standard Support Business Hours
Asset Name	Chassis	Entitlement Process	Standard Support Entitlement Process
Per Incident	☐	Remaining Cases	
Cases Per Entitlement			
Created By	Install Dev, 7/9/2012 7:24 PM	Last Modified By	Install Dev, 7/9/2012 7:24 PM
▼ Renewal Management Information			
Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003Kbg0IAC
Product	Chassis		

- 2 x “1-Year Hardware Warranty” Entitlements for “Module” Assets

Entitlement Detail			
Entitlement Name	1-Year Hardware Warranty	Status	Active
Type	Standard Support	Status Icon	
Account Name	BoonPlus	Start Date	6/1/2012
Service Contract		End Date	5/31/2013
Contract Line Item		Business Hours	Standard Support Business Hours
Asset Name	Module	Entitlement Process	Standard Support Entitlement Process
Per Incident	☐	Remaining Cases	
Cases Per Entitlement			
Created By	Install Dev, 7/9/2012 7:24 PM	Last Modified By	Install Dev, 7/9/2012 7:24 PM
▼ Renewal Management Information			
Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003Ke4XIAS
Product	Module		



Renewal Management Lite Use Case – Installed Base Products

- “90-Day” Entitlement for “Accessory” Asset

Entitlement Detail			
Entitlement Name	90-Day Hardware Warranty	Status	Active
Type	Standard Support	Status Icon	
Account Name	BoonPlus	Start Date	6/1/2012
Service Contract		End Date	8/29/2012
Contract Line Item		Business Hours	Standard Support Business Hours
Asset Name	Accessory	Entitlement Process	Standard Support Entitlement Process
Per Incident	☐	Remaining Cases	
Cases Per Entitlement			
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 7:24 PM
▼ Renewal Management Information			
Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003KbfzIAC
Product	Accessory		

- Free “Standard Support” Entitlement for the 1st Year

Entitlement Detail			
Entitlement Name	Standard Support	Status	Active
Type	Standard Support	Status Icon	
Account Name	BoonPlus	Start Date	6/1/2012
Service Contract		End Date	5/31/2013
Contract Line Item		Business Hours	Standard Support Business Hours
Asset Name		Entitlement Process	Standard Support Entitlement Process
Per Incident	☐	Remaining Cases	
Cases Per Entitlement			
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 7:24 PM
▼ Renewal Management Information			
Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003Kbg4IAC
Product	Standard Support		



Renewal Management Lite Use Case – Installed Base Products

- Paid “Standard Support” Entitlement for the 2nd and 3rd Year

Entitlement Detail			
Entitlement Name	Standard Support	Status	Inactive
Type	Standard Support	Status Icon	
Account Name	BoonPlus	Start Date	6/1/2013
Service Contract		End Date	5/31/2015
Contract Line Item		Business Hours	Standard Support Business Hours
Asset Name		Entitlement Process	Standard Support Entitlement Process
Per Incident	☐	Remaining Cases	
Cases Per Entitlement			
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 7:24 PM

▼ **Renewal Management Information**

Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003Kbg9IAC
Product	Standard Support		

- **Renewal Opportunity**

Based on the settings in the “Created From Opportunity” and Renewal Management Application, the Close Date (5/1/2013) = Entitlement End Date (5/31/2013) – Days before Entitlement End Date (30 Days) and the Opportunity name is prepended with Close Date (2013-05-01) + Opportunity Name Prefix (Renewal –), followed by the “Created From Opportunity” Name.

▼ **Opportunity Information**

Opportunity Owner	Install Dev [Change]	Amount	\$4,000.00
Private	☐	Expected Revenue	\$400.00
Opportunity Name	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Close Date	5/1/2015
Account Name	BoonPlus	Stage	Prospecting
Type	Renewal	Probability (%)	10%
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 7:24 PM

► **Renewal Management Information**

[Edit](#) [Delete](#) [Clone](#) ▼

Products (Price Book A) [Add Product](#) [Edit All](#) [Choose Price Book](#) [Products \(Price Book A\) Help](#)

[Sort](#)

Action	Product	Sales Price	Quantity	Total Price	Line Description
Edit Del	Standard Support - Renewal	\$4,000.00	1.00	\$4,000.00	2nd, 3rd Year paid Standard Support



Renewal Management Lite Use Case – Installed Base Products

- “Standard Support - Renewal” Renewal Opportunity Product

Opportunity Product Detail		Edit	Delete
Opportunity	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support		Date
Product	Standard Support - Renewal	Total Price	\$4,000.00
Product Code			
List Price	\$0.00		
Sales Price	\$4,000.00		
Quantity	1.00		
Created By	Install Dev, 7/9/2012 7:24 PM	Last Modified By	Install Dev, 7/9/2012 7:24 PM
Line Description	2nd, 3rd Year paid Standard Support		

▼ Renewal Management Information

Asset Serial Number ?	Entitlement Start Date ?
Asset Ship Date ?	Entitlement End Date ?
Not A Renewal Opportunity Line Item ? ☐	Entitlement Term (Months) ?
Created From Opportunity ? 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link ? https://na12.salesforce.com/00kU00000003Kbg9IAC

Things to know

- How the “Start Date” is selected by the Renewal Management for the New Entitlements?
 - 1st Priority: The Entitlement Start Date from the Opportunity Product record.
 - 2nd Priority: The Entitlement Start Date from the Opportunity record.
 - Default: Today's Date.
- How the “End Date” is selected/calculated by the Renewal Management for the New Entitlements?
 - 1st Priority: The Term from the Entitlement Template that is associated to the Opportunity Product if the “No Override Template Term” checkbox is checked in the Product.
 - 2nd Priority: The Entitlement End Date or Entitlement Term from the Opportunity Product record.
 - 3rd Priority: The Entitlement End Date or Entitlement Term from the Opportunity record.
 - 4th Priority: The Term from the Entitlement Template that is associated to the Opportunity Product.
 - Default: Default Term from the Renewal Management Application settings.

B Renewal Management Lite Use Case – Installed Base Products

Scenario # 2 – Existing Customer, New Order, Co-Term, Service Contract Disabled

On 1/1/2013, the same customer from Scenario # 1 wants to order 1 x Chassis, 1 x Module plus Standard Support.

- How should the Sales/Renewal rep configure the Renewal Management Settings in Opportunity for this new order so the two orders from the same customer can be co-terminated in the next renewal?

Solution (Done by the Sales/Renewal Rep)

- Create the Opportunity and configure its Renewal Management settings
 - The Sales/Renewal rep should follow the screenshot below and create the opportunity.

▼ Opportunity Information				
Opportunity Owner	Install Dev [Change]	Amount	\$16,800.00	
Private	☐	Expected Revenue	\$16,800.00	
Opportunity Name	1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support		Close Date	1/1/2013
Account Name	BoonPlus	Stage	Closed Won	
Type		Probability (%)	100%	
Created By	Install Dev , 6/6/2012 10:38 PM	Last Modified By	Install Dev , 7/9/2012 8:23 PM	

- Add products to this opportunity.

Products (Price Book A)					
		Add Product	Edit All	Choose Price Book	Products (Price Book A) Help
		Sort			
Action	Product	Sales Price	Quantity	Total Price	Line Description
Edit Del	Chassis	\$10,000.00	1.00	\$10,000.00	3 Year Hardware Warranty
Edit Del	Module	\$4,000.00	1.00	\$4,000.00	1 Year Hardware Warranty
Edit Del	Standard Support	\$0.00	1.00	\$0.00	1st Year free Standard Support
Edit Del	Standard Support	\$2,800.00	1.00	\$2,800.00	17 Months paid Standard Support

- Configure the Renewal Management settings and Save.

▼ Renewal Management Information				
Run Renewal Management	☒	Reset Renewal Management	☐	
Asset Contact	John Bond	Entitlement Start Date	1/1/2013	
Asset Ship Date	1/1/2013	Entitlement End Date		
CoTerm With Existing Renewal Opportunity	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support		Entitlement Term (Months)	
Edit Delete Clone ▼				

B Renewal Management Lite Use Case – Installed Base Products Results

- **New records created by “Renewal Management”**
 - 2 x Assets.
 - 4 x Entitlements.
 - 1 x Renewal Opportunity Products.

Assets New Asset Assets Help ?					
Action	Asset Name	Account Name	Contact Name	Product Name	Ship Date
Edit Del	Chassis	BoonPlus	John Bond	Chassis	1/1/2013
Edit Del	Module	BoonPlus	John Bond	Module	1/1/2013

Entitlements Entitlements Help ?								
Action	Entitlement Name	Asset Name	Account Name	Product	Start Date	End Date	Status	Status Icon
Create Case	1-Year Hardware Warranty	Module	BoonPlus	Module	1/1/2013	12/31/2013	Inactive	✓
Create Case	3-Year Hardware Warranty	Chassis	BoonPlus	Chassis	1/1/2013	12/31/2015	Inactive	✓
Create Case	Standard Support		BoonPlus	Standard Support	1/1/2013	12/31/2013	Inactive	✓
Create Case	Standard Support		BoonPlus	Standard Support	1/1/2014	5/31/2015	Inactive	✓

Renewal Opportunities New Opportunity Renewal Opportunities Help ?	
No records to display	

Renewal Opportunity Products Renewal Opportunity Products Help ?					
Action	Renewal Opportunity Name	Product	Sales Price	Quantity	Total Price
Edit Del	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Standard Support - Renewal	\$2,800.00	1.00	\$2,800.00

- **“Co-Terminated” Renewal Opportunity**
One additional Renewal Opportunity Product was added to the Renewal Opportunity. Now the two Created From Opportunities “1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support” and “1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support” are “Co-Terminated” by the same Renewal Opportunity.



Renewal Management Lite Use Case – Installed Base Products

▼ Opportunity Information

Opportunity Owner	Install Dev [Change]	Amount	\$6,800.00	
Private	☐	Expected Revenue	\$680.00	
Opportunity Name	2015-05-01 Renewal - 1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support		Close Date	5/1/2015
Account Name	BoonPlus	Stage	Prospecting	
Type	Renewal	Probability (%)	10%	
Created By	Install Dev , 7/9/2012 7:24 PM	Last Modified By	Install Dev , 7/9/2012 8:26 PM	

► Renewal Management Information

[Edit](#) [Delete](#) [Clone](#) ▼

Products (Price Book A) [Add Product](#) [Edit All](#) [Choose Price Book](#) [Products \(Price Book A\) Help](#) [?](#)

[Sort](#)

Action	Product	Sales Price	Quantity	Total Price	Line Description
Edit Del	Standard Support - Renewal	\$4,000.00	1.00	\$4,000.00	2nd, 3rd Year paid Standard Support
Edit Del	Standard Support - Renewal	\$2,800.00	1.00	\$2,800.00	17 Months paid Standard Support

B Renewal Management Lite Use Case – Installed Base Products

Scenario # 3 – New Customer, New Order, Service Contract Enabled

Scenario # 3 is very similar to scenario # 1, the only difference is that the Service Contract is enabled in this scenario. A Network Device company provides network solution for enterprises and data centers around the globe. Their solution includes hardware devices (Chassis, Modules, Accessories, etc.) and software for virtual network management. All hardware sold by this company comes with hardware warranty (Note: the “Warranty Start Date” is the Product “Ship Date”) and a free 1 year standard support if the customer purchases a Chassis. Now this company wants to use “Renewal Management Enterprise” to create “Assets”, “Entitlements”, “Service Contracts” and “Renewal Opportunities” based on the Opportunity Product Line Items in their Opportunities.

- How should the Renewal Management Administrator configure “Renewal Management Enterprise” Application to support this scenario?
- How should the Renewal Management Administrator configure the Renewal Management Settings in their Products?
- On 6/1/2012, a new customer wants to order 1 x Chassis, 2 x Modules, 4 x Accessories plus 2 more years of standard support, how should the Sales/Renewal rep configure the Renewal Management Settings in Opportunity?

Solution - Part I (Done by the Renewal Management Administrator)

- **Renewal Management Application Level Configuration**
 - Login as Renewal Management Administrator.
 - Go to **Your Name > Setup > App Setup > Deploy > Installed Packages > Renewal Management Enterprise > Configure**
 - For Scenario # 3, the Renewal Management Administrator needs to enable all settings at the Application level, see the screenshot below for the example.

The screenshot displays the 'Renewal Management Settings' application interface. At the top, there is a header bar with the title 'Renewal Management Settings' and a legend indicating that a red vertical bar represents 'Required Information'. Below the header, the settings are organized into several sections, each with a dropdown arrow and a title. Each setting is represented by a checkbox, a required information icon (red vertical bar), and a value field.

Section	Setting	Value
Main Settings	Enable Renewal Management	Default Term (Months) 12
	Asset Settings	Asset Status Shipped
Entitlement Settings	Create Entitlement	
	Add Asset Contact To Entitlement	
Service Contract Settings	Create/CoTerm Service Contract	Source Of Service Contract Owner Created From Opportunity Owner
	Renewal Opportunity Settings	Source Of Opportunity Owner Created From Opportunity Owner
Renewal Opportunity Settings	Add Close Date (YYYY-MM-DD) To Opportunity Name	Opportunity Stage Prospecting
		Opportunity Type Renewal
		Days Before Entitlement End Date 30
		Opportunity Name Prefix Renewal -



Renewal Management Lite Use Case – Installed Base Products

- **Enable the Service Contract Settings in “Chassis” Product**
 - Open the “Chassis” product record created in scenario # 1, enable the Service Contract related settings.

▼ Product Information	
Product Name	Chassis
Product Code	Product Family
Created By	John Smith, 6/3/2012 11:08 PM
Last Modified By	John Smith, 7/9/2012 8:37 PM
Product Description	
▼ Renewal Management Information - Asset Settings	
Create Asset	☒
Create One Asset Record Per Quantity	☒
Link Asset to Service Contract	☒
▼ Renewal Management Information - Entitlement Settings	
Create Entitlement	☒
Convert Term (Days) to Term (Months)	☒
Link Entitlement to Service Contract	☒
No Override On Template Term	☒
▼ Renewal Management Information - Service Contract Settings	
Add as Line Item to Service Contract	☐
▼ Renewal Management Information - Renewal Opportunity Settings	
Add as Line Item to Renewal Opportunity	☐
Renew With (The Same Product)	☐
Renew With (A Different Product)	☐



Renewal Management Lite Use Case – Installed Base Products

- **Enable the Service Contract Settings in “Module” Product**
 - Open the “Module” product record created in scenario # 1, enable the Service Contract related settings.

▼ Product Information			
Product Name	Module	Active	☒
Product Code	Product Family		
Created By	<u>John Smith</u> , 6/4/2012 4:01 PM	Last Modified By	<u>John Smith</u> , 7/9/2012 8:39 PM
Product Description	1 Year Hardware Warranty		
▼ Renewal Management Information - Asset Settings			
Create Asset	☒	Create One Asset Record Per Quantity	☒
Link Asset to Service Contract	☒		
▼ Renewal Management Information - Entitlement Settings			
Create Entitlement	☒	Convert Term (Days) to Term (Months)	☒
Link Entitlement to Service Contract	☒	No Override On Template Term	☒
▼ Renewal Management Information - Service Contract Settings			
Add as Line Item to Service Contract	☐		
▼ Renewal Management Information - Renewal Opportunity Settings			
Add as Line Item to Renewal Opportunity	☐	Renew With (The Same Product)	☐
		Renew With (A Different Product)	☐



Renewal Management Lite Use Case – Installed Base Products

- **Enable the Service Contract Settings in “Accessory” Product**
 - Open the “Accessory” product record created in scenario # 1, enable the Service Contract related settings.

▼ Product Information	
Product Name	Accessory
Product Code	
Created By	John Smith, 6/4/2012 4:02 PM
Product Description	
Active	☒
Product Family	
Last Modified By	John Smith, 7/9/2012 8:43 PM
▼ Renewal Management Information - Asset Settings	
Create Asset	☒
Link Asset to Service Contract	☒
Create One Asset Record Per Quantity	☐
▼ Renewal Management Information - Entitlement Settings	
Create Entitlement	☒
Link Entitlement to Service Contract	☒
Convert Term (Days) to Term (Months)	☐
No Override On Template Term	☒
▼ Renewal Management Information - Service Contract Settings	
Add as Line Item to Service Contract	☐
▼ Renewal Management Information - Renewal Opportunity Settings	
Add as Line Item to Renewal Opportunity	☐
Renew With (The Same Product)	☐
Renew With (A Different Product)	☐



Renewal Management Lite Use Case – Installed Base Products

- **Enable the Service Contract Settings in “Standard Support” Product**
 - Open the “Standard Support” product record created in scenario # 1, enable the Service Contract related settings.

▼ Product Information	
Product Name	Standard Support
Product Code	Product Family
Created By	John Smith, 6/4/2012 9:38 PM
Last Modified By	John Smith, 7/9/2012 8:45 PM
Product Description	
▼ Renewal Management Information - Asset Settings	
Create Asset	Create One Asset Record Per Quantity
Link Asset to Service Contract	
▼ Renewal Management Information - Entitlement Settings	
Create Entitlement	Convert Term (Days) to Term (Months)
Link Entitlement to Service Contract	No Override On Template Term
▼ Renewal Management Information - Service Contract Settings	
Add as Line Item to Service Contract	
▼ Renewal Management Information - Renewal Opportunity Settings	
Add as Line Item to Renewal Opportunity	Renew With (The Same Product)
	Renew With (A Different Product)

B Renewal Management Lite Use Case – Installed Base Products

Solution - Part II (Done by the Sales/Renewal Rep)

- **Create the Opportunity and configure its Renewal Management settings**
 - Renewal Management Administrator needs to add a “Renewal Management Information” section to Sales/Renewal Rep’s Opportunity Page Layout and set the field level security of each Renewal Management field to “Visible” before the Reps can start using Renewal Management in their opportunities, see the screenshot below for the example.
 - Renewal Management Information section in the **Opportunity** Page Layout

Renewal Management Information	
Run Renewal Management	Reset Renewal Management
Asset Contact	Asset Ship Date [7/9/2012]
New Service Contract Name	New Service Contract Start Date [7/9/2012]
New Service Contract Description	New Service Contract End Date [7/9/2012]
New Renewal Opportunity Name	New Service Contract Term (Months)
CoTerm With Current Service Contract	Entitlement Start Date [7/9/2012]
CoTerm With Existing Renewal Opportunity	Entitlement End Date [7/9/2012]
	Entitlement Term (Months)

- Renewal Management Information section in the **Opportunity Product** Page Layout

Renewal Management Information	
Asset Serial Number	Entitlement Start Date [7/9/2012]
Asset Ship Date [7/9/2012]	Entitlement End Date [7/9/2012]
Not A Service Contract Line Item	Entitlement Term (Months)
Not A Renewal Opportunity Line Item	Created From Opportunity



Renewal Management Lite Use Case – Installed Base Products

- The Sales/Renewal Rep should follow the screenshot below and create the opportunity.

▼ Opportunity Information				
Opportunity Owner	InstallSrv Dev [Change]	Amount	\$24,000.00	
Private	☐	Expected Revenue	\$24,000.00	
Opportunity Name	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support		Close Date	6/1/2012
Account Name	BoonPlus	Stage	Closed Won	
Type		Probability (%)	100%	
Created By	John Smith , 6/10/2012 10:01 AM	Last Modified By	InstallSrv Dev , 7/9/2012 8:49 PM	

- Add products to this opportunity.
- For the 1st Year free Standard Support, check “Not A Service Contract Line Item” and “Not A Renewal Opportunity Product Line Item” checkbox and set the Entitlement Term to “12” in the Opportunity Product record.
- For the 2nd, 3rd Year paid Standard Support, set the Entitlement Start Date to “6/1/2013” and Entitlement Term (Months) to “24” in the Opportunity Product record.

Products (Price Book A)					
Add Product Edit All Choose Price Book Sort Products (Price Book A) Help					
Action	Product	Sales Price	Quantity	Total Price	Line Description
Edit Del	Accessory	\$500.00	4.00	\$2,000.00	90 Days Hardware Warranty
Edit Del	Chassis	\$10,000.00	1.00	\$10,000.00	3 Year Hardware Warranty
Edit Del	Module	\$4,000.00	2.00	\$8,000.00	1 Year Hardware Warranty
Edit Del	Standard Support	\$0.00	1.00	\$0.00	1st Year free Standard Support
Edit Del	Standard Support	\$4,000.00	1.00	\$4,000.00	2nd, 3rd Year paid Standard Support

- Configure the Renewal Management settings and Save.

▼ Renewal Management Information	
Run Renewal Management ☒	Reset Renewal Management ☐
Asset Contact John Bond	Asset Ship Date 6/1/2012
New Service Contract Name 3 Year (2012-2015) Service Contract	New Service Contract Start Date 6/1/2012
New Service Contract Description 3 Year (2012-2015) Service Contract Coverage: All Products, All Contacts, All Services, All Sites	New Service Contract End Date
New Renewal Opportunity Name 2015 Renewal Opportunity	New Service Contract Term (Months) 36
CoTerm With Current Service Contract	Entitlement Start Date 6/1/2012
CoTerm With Existing Renewal Opportunity	Entitlement End Date
	Entitlement Term (Months)

B Renewal Management Lite Use Case – Installed Base Products Results

- **New records created by “Renewal Management”**

- 4 x Assets.
- 6 x Entitlements.
- 1 x Service Contract.
- 1 x Contract Line Item.
- 1 x Renewal Opportunity.
- 1 x Renewal Opportunity Product.

Note: Renewal Management Administrator can add the following related lists (Assets, Entitlements, Service Contracts, Contract Line Items, Renewal Opportunities & Renewal Opportunity Products) to Sales/Renewal Rep's Opportunity page layouts, see the screenshot below for the example.

Assets New Asset Assets Help						
Action	Asset Name	Account Name	Contact Name	Product Name	Ship Date	
Edit Del	Accessory	BoonPlus	John Bond	Accessory	6/1/2012	
Edit Del	Chassis	BoonPlus	John Bond	Chassis	6/1/2012	
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012	
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012	

Entitlements Entitlements Help								
Action	Entitlement Name	Asset Name	Account Name	Product	Start Date	End Date	Status	Status
Create Case	1-Year Hardware Warranty	Module	BoonPlus	Module	6/1/2012	5/31/2013	Active	✔
Create Case	1-Year Hardware Warranty	Module	BoonPlus	Module	6/1/2012	5/31/2013	Active	✔
Create Case	3-Year Hardware Warranty	Chassis	BoonPlus	Chassis	6/1/2012	5/31/2015	Active	✔
Create Case	90-Day Hardware Warranty	Accessory	BoonPlus	Accessory	6/1/2012	8/29/2012	Active	✔
Create Case	Standard Support		BoonPlus	Standard Support	6/1/2012	5/31/2015	Active	✔
Show 1 more » Go to list (6) »								

Service Contracts Service Contracts Help						
Action	Contract Name	Start Date	End Date	Approval Status	Status	Status Icon
	3 Year (2012-2015) Service Contract	6/1/2012	5/31/2015	Draft	Active	✔



Renewal Management Lite Use Case – Installed Base Products



Contract Line Items

[Contract Line Items Help](#)

Action	Line Item Number	Service Contract Name	Product Name	Start Date	End Date	Total Price	Description	Status	Status
	1	3 Year (2012-2015) Service Contract	Standard Support	6/1/2013	5/31/2015	\$4,000.00	2nd, 3rd Year paid Standard Support	Inactive	



Renewal Opportunities

[Renewal Opportunities Help](#)

New Opportunity

Action	Opportunity Name	Account Name	Close Date	Amount	Stage
Edit Del	2015 Renewal Opportunity	BoonPlus	5/1/2015	\$4,000.00	Prospecting

Renewal Opportunity Products

[Renewal Opportunity Products Help](#)

Action	Renewal Opportunity Name	Product	Sales Price	Quantity	Total Price
Edit Del	2015 Renewal Opportunity	Standard Support - Renewal	\$4,000.00	1.00	\$4,000.00



Renewal Management Lite Use Case – Installed Base Products

Service Contract

Based on the settings in the “Created From Opportunity”, the Service Contract Name is set to “3 Year (2012-2015) Service Contract”.

Service Contract Detail			
Service Contract Owner	InstallSrv Dev	Status Icon	
Contract Number	00009184	Start Date	6/1/2012
Contract Name	3 Year (2012-2015) Service Contract	End Date	5/31/2015
Description	3 Year (2012-2015) Service Contract Coverage: All Products, All Contacts, All Services, All Sites	Term (months)	36
Account Name	BoonPlus	Special Terms	
Contact Name		Line Items	1
Subtotal	\$4,000.00	Shipping and Handling	
Discount	0.00%	Tax	
Total Price	\$4,000.00	Grand Total	\$4,000.00
Billing Address		Shipping Address	
Created By	InstallSrv Dev , 7/9/2012 8:49 PM	Last Modified By	InstallSrv Dev , 7/9/2012 8:49 PM

▼ Renewal Management Information

Created From Opportunity [1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support](#)

Assets

[New Asset](#)[Assets He](#)

Action	Asset Name	Account Name	Contact Name	Product Name	Ship Date
Edit Del	Accessory	BoonPlus	John Bond	Accessory	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012
Edit Del	Chassis	BoonPlus	John Bond	Chassis	6/1/2012



Entitlements

[Entitlements He](#)

Action	Entitlement	Account Name	Product	Start Date	End Date	Status	Status
Create Case	90-Day Hardware Warranty	BoonPlus	Accessory	6/1/2012	8/29/2012	Active	
Create Case	1-Year Hardware Warranty	BoonPlus	Module	6/1/2012	5/31/2013	Active	
Create Case	1-Year Hardware Warranty	BoonPlus	Module	6/1/2012	5/31/2013	Active	
Create Case	Standard Support	BoonPlus	Standard Support	6/1/2012	5/31/2015	Active	
Create Case	Standard Support	BoonPlus	Standard Support	6/1/2013	5/31/2015	Inactive	



Contract Line Items (Price Book A)

[Add Line Item](#)[Contract Line Items \(Price Book A\) He](#)

Action	Line Item Number	Created From Opportunity	Product Name	Start Date	End Date	Total Price	Description	Status	Status
	1	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Standard Support	6/1/2013	5/31/2015	\$4,000.00	2nd, 3rd Year paid Standard Support	Inactive	



Renewal Management Lite Use Case – Installed Base Products

- “Standard Support” Contract Line Item

Contract Line Item Detail			
Line Item Number	1	Status Icon	
Product	Standard Support	Start Date	6/1/2013
Service Contract	3 Year (2012-2015) Service Contract	End Date	5/31/2015
Description	2nd, 3rd Year paid Standard Support		
List Price	\$0.00	Subtotal	\$4,000.00
Sales Price	\$4,000.00	Discount	
Quantity	1.00	Total Price	\$4,000.00
Asset Name			
Created By	InstallSrv Dev, 7/9/2012 8:49 PM	Last Modified By	InstallSrv Dev, 7/9/2012 8:49 PM

▼ Renewal Management Information

Created From Opportunity	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	Created From Opportunity Product Link	https://na12.salesforce.com/00kU00000003Ke46IAC
--------------------------	--	---------------------------------------	---

- Renewal Opportunity

Based on the settings in the “Created From Opportunity” and Renewal Management Application, the Opportunity Name is set to “2015 Renewal Opportunity” and the Close Date (5/1/2015) = Service Contract End Date (5/31/2015) – Days before Entitlement End Date (30 Days, defined at Application Level).

▼ Opportunity Information

Opportunity Owner	InstallSrv Dev [Change]	Amount	\$4,000.00
Private	☐	Expected Revenue	\$400.00
Opportunity Name	2015 Renewal Opportunity	Close Date	5/1/2015
Account Name	BoonPlus	Stage	Prospecting
Type	Renewal	Probability (%)	10%
Created By	InstallSrv Dev, 7/9/2012 8:49 PM	Last Modified By	InstallSrv Dev, 7/9/2012 8:49 PM

► Renewal Management Information

[Edit](#) [Delete](#) [Clone](#) ▼

Products (Price Book A)

[Add Product](#) [Edit All](#) [Choose Price Book](#) [Products \(Price Book A\) Help](#)

[Sort](#)

Action	Product	Sales Price	Quantity	Total Price	Line Description
Edit Del	Standard Support - Renewal	\$4,000.00	1.00	\$4,000.00	2nd, 3rd Year paid Standard Support

Renewal Management Lite Use Case – Installed Base Products

Things to know

- How the “Start Date” is selected by the Renewal Management for the New Entitlements?
 - 1st Priority: The Entitlement Start Date from the Opportunity Product record if it is greater than the Service Contract Start Date in the Opportunity record.
 - 2nd Priority: The Entitlement Start Date from the Opportunity record if it is greater than the Service Contract Start Date in the Opportunity record.
 - 3rd Priority: The Service Contract Start Date from the Opportunity record.
 - Default: Today's Date.
- How the “End Date” is selected/calculated by the Renewal Management for the New Entitlements?
 - 1st Priority: The Term from the Entitlement Template that is associated to the Opportunity Product if the “No Override Template Term” checkbox is checked in the Product.
 - 2nd Priority: The Entitlement End Date or Entitlement Term from the Opportunity Product record if it is earlier than the Service Contract End Date in the Opportunity record.
 - 3rd Priority: The Entitlement End Date or Entitlement Term from the Opportunity record if it is earlier than the Service Contract End Date in the Opportunity record.
 - 4th Priority: The Term from the Entitlement Template that is associated to the Opportunity Product if the Start Date + Template Term is earlier than the Service Contract End Date in the Opportunity record.
 - 5th Priority: The Service Contract End Date from the Opportunity record.
 - Default: Default Term from the Renewal Management Application settings.

B Renewal Management Lite Use Case – Installed Base Products

Scenario # 4 – Existing Customer, New Order, Co-Term, Service Contract Enabled

Scenario # 4 is very similar to scenario # 2, the only difference is that the Service Contract is enabled in this scenario. On 1/1/2013, the same customer from Scenario # 3 wants to order 1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support.

- How should the Sales/Renewal rep configure the Renewal Management Settings in Opportunity for this new order so the two orders from the same customer can be co-terminated in the next renewal?

Solution (Done by the Sales/Renewal Rep)

- Create the Opportunity and configure its Renewal Management settings
 - The Sales/Renewal rep should follow the screenshot below and create the opportunity.

▼ Opportunity Information			
Opportunity Owner	InstallSrv Dev [Change]	Amount	\$16,800.00
Private	☐	Expected Revenue	\$16,800.00
Opportunity Name	1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support	Close Date	1/1/2013
Account Name	BoonPlus	Stage	Closed Won
Type		Probability (%)	100%
Created By	John Smith , 6/11/2012 7:11 AM	Last Modified By	InstallSrv Dev , 7/9/2012 9:32 PM

- Add products to this opportunity.
- For the 1st Year free Standard Support, check “Not A Service Contract Line Item” and “Not A Renewal Opportunity Product Line Item” checkbox.
- For the 17 Months paid Standard Support, set the Entitlement Start Date to “1/1/2014” and Entitlement End Date to “5/31/2015” in the Opportunity Product record.

Products (Price Book A)		Add Product	Edit All	Choose Price Book	Sort	Products (Price Book A) Help
Action	Product	Sales Price	Quantity	Total Price	Line Description	
Edit Del	Chassis	\$10,000.00	1.00	\$10,000.00	3 Year Hardware Warranty	
Edit Del	Module	\$4,000.00	1.00	\$4,000.00	1 Year Hardware Warranty	
Edit Del	Standard Support	\$0.00	1.00	\$0.00	1st Year free Standard Support	
Edit Del	Standard Support	\$2,800.00	1.00	\$2,800.00	17 Months paid Standard Support	



Renewal Management Lite Use Case – Installed Base Products

- Configure the Renewal Management settings and Save.

▼ Renewal Management Information	
Run Renewal Management  ☒	Reset Renewal Management  ☐
Asset Contact  <u>John Bond</u>	Asset Ship Date  1/1/2013
New Service Contract Name 	New Service Contract Start Date 
New Service Contract Description 	New Service Contract End Date 
New Renewal Opportunity Name 	New Service Contract Term (Months)
CoTerm With Current Service Contract  <u>3 Year (2012-2015) Service Contract</u>	Entitlement Start Date   1/1/2013
CoTerm With Existing Renewal Opportunity  <u>2015 Renewal Opportunity</u>	Entitlement End Date 
	Entitlement Term (Months) 

B Renewal Management Lite Use Case – Installed Base Products Results

- New records created by “Renewal Management”
 - 2 x Assets.
 - 4 x Entitlements.
 - 1 x Contract Line Item.
 - 1 x Renewal Opportunity Products.

Assets New Asset Assets Help						
Action	Asset Name	Account Name	Contact Name	Product Name	Ship Date	
Edit Del	Chassis	BoonPlus	John Bond	Chassis	1/1/2013	
Edit Del	Module	BoonPlus	John Bond	Module	1/1/2013	

Entitlements Entitlements Help								
Action	Entitlement Name	Asset Name	Account Name	Product	Start Date	End Date	Status	Status
Create Case	1-Year Hardware Warranty	Module	BoonPlus	Module	1/1/2013	12/31/2013	Inactive	✔
Create Case	3-Year Hardware Warranty	Chassis	BoonPlus	Chassis	1/1/2013	12/31/2015	Inactive	✔
Create Case	Standard Support		BoonPlus	Standard Support	1/1/2013	12/31/2013	Inactive	✔
Create Case	Standard Support		BoonPlus	Standard Support	1/1/2014	5/31/2015	Inactive	✔

Service Contracts Service Contracts Help	
No records to display	

Contract Line Items Contract Line Items Help									
Action	Line Item Number	Service Contract Name	Product Name	Start Date	End Date	Total Price	Description	Status	Status
	2	3 Year (2012-2015) Service Contract	Standard Support	1/1/2014	5/31/2015	\$2,800.00	17 Months paid Standard Support	Inactive	✔

Renewal Opportunities New Opportunity Renewal Opportunities Help	
No records to display	

Renewal Opportunity Products Renewal Opportunity Products Help					
Action	Renewal Opportunity Name	Product	Sales Price	Quantity	Total P
Edit Del	2015 Renewal Opportunity	Standard Support - Renewal	\$2,800.00	1.00	\$2,800



Renewal Management Lite Use Case – Installed Base Products

- Co-Terminated Service Contract Detail**

Two new Assets and four new Entitlements and one new Contract Line Item (“2”) were added to “3 Year (2013-2015) Service Contract”. Now the two Created From Opportunities “1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support” and “1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support” are “Co-Terminated” by the same Service Contract.

Service Contract Detail

Service Contract Owner

InstallSrv Dev

Status Icon

Contract Number

00009187

Start Date

6/1/2012

Contract Name

3 Year (2012-2015) Service Contract

End Date

5/31/2015

Description

3 Year (2012-2015) Service Contract Coverage: All Products, All Contacts, All Services, All Sites

Term (months)

36

Account Name

BoonPlus

Special Terms

Contact Name

Line Items

2

Subtotal

\$6,800.00

Shipping and Handling

Discount

0.00%

Tax

Total Price

\$6,800.00

Grand Total

\$6,800.00

Billing Address

Shipping Address

Created By

InstallSrv Dev, 7/9/2012 9:45 PM

Last Modified By

InstallSrv Dev, 7/9/2012 9:52 PM

▼ Renewal Management Information

Created From Opportunity

1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support

Assets

New Asset

Assets H

Action	Asset Name	Account Name	Contact Name	Product Name	Ship Date
Edit Del	Accessory	BoonPlus	John Bond	Accessory	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	6/1/2012
Edit Del	Chassis	BoonPlus	John Bond	Chassis	6/1/2012
Edit Del	Module	BoonPlus	John Bond	Module	1/1/2013

[Show 1 more »](#) | [Go to list \(6\) »](#)

Entitlements

Entitlements H

Action	Entitlement	Account Name	Product	Start Date	End Date	Status	Status
Create Case	90-Day Hardware Warranty	BoonPlus	Accessory	6/1/2012	8/29/2012	Active	
Create Case	1-Year Hardware Warranty	BoonPlus	Module	6/1/2012	5/31/2013	Active	
Create Case	1-Year Hardware Warranty	BoonPlus	Module	6/1/2012	5/31/2013	Active	
Create Case	Standard Support	BoonPlus	Standard Support	1/1/2013	12/31/2013	Inactive	
Create Case	1-Year Hardware Warranty	BoonPlus	Module	1/1/2013	12/31/2013	Inactive	

Renewal Management Lite Use Case – Installed Base Products

Contract Line Items (Price Book A) Add Line Item									
Contract Line Items (Price Book A) Help									
Action	Line Item Number	Created From Opportunity	Product Name	Start Date	End Date	Total Price	Description	Status	Stat
	1	<u>1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support</u>	<u>Standard Support</u>	6/1/2013	5/31/2015	\$4,000.00	2nd, 3rd Year paid Standard Support	Inactive	✓
	2	<u>1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support</u>	<u>Standard Support</u>	1/1/2014	5/31/2015	\$2,800.00	17 Months paid Standard Support	Inactive	✓

- Co-Terminated Renewal Opportunity Detail**

One additional Renewal Opportunity Product was added to the Renewal Opportunity - "2015 Renewal Opportunity". Now the two Created From Opportunities "1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support" and "1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support" are "Co-Terminated" by the same Renewal Opportunity.

▼ Opportunity Information

Opportunity Owner	InstallSrv Dev [Change]	Amount	\$6,800.00
Private	☐	Expected Revenue	\$680.00
Opportunity Name	2015 Renewal Opportunity	Close Date	5/1/2015
Account Name	BoonPlus	Stage	Prospecting
Type	Renewal	Probability (%)	10%
Created By	InstallSrv Dev , 7/9/2012 9:45 PM	Last Modified By	InstallSrv Dev , 7/9/2012 9:52 PM

► Renewal Management Information

EditDeleteClone ▼

Products (Price Book A)

Add ProductEdit AllChoose Price Book

Products (Price Book A) Help ?

Sort

Action	Product	Created From Opportunity	Sales Price	Quantity	Total Price	Line Description
Edit Del	Standard Support - Renewal	1 x Chassis, 2 x Modules, 4 x Accessories, 1 Year free plus 2 Year paid Standard Support	\$4,000.00	1.00	\$4,000.00	2nd, 3rd Year paid Standard Support
Edit Del	Standard Support - Renewal	1 x Chassis, 1 x Module, 1 Year free plus 17 Months paid Standard Support	\$2,800.00	1.00	\$2,800.00	17 Months paid Standard Support