

NEOAUG



Streamline Oracle Service Contracts

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About Protégé

- Oracle Gold Partner
- Information Technology Professional Services firm in operation since 1993.
- Full service offerings including Project Management, Functional, and Technical Consulting Services.
- Long term Customer Relationships



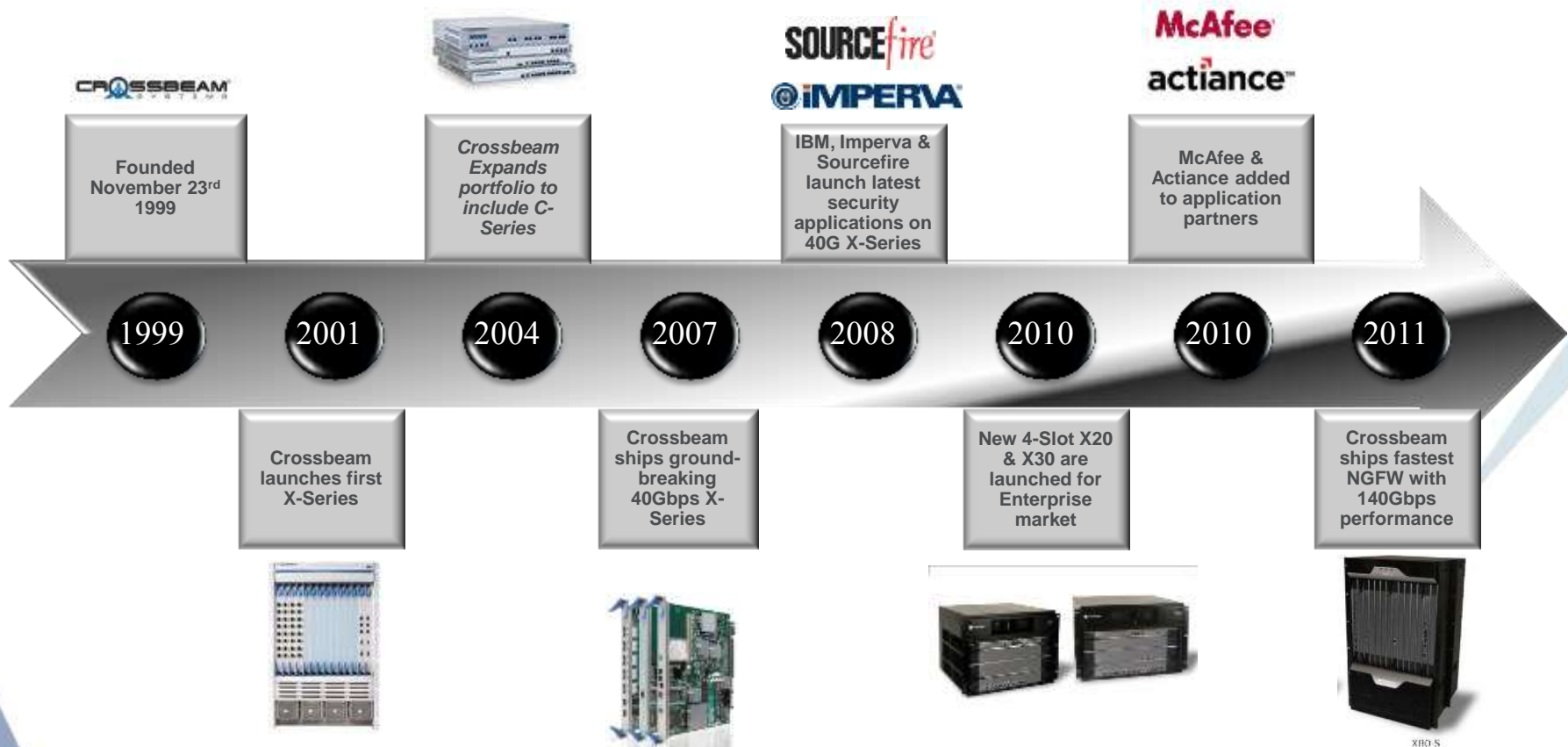
About Crossbeam

- Headquartered in MA; Global offices
- Makes Open, High Performance Network Security Platform
 - Deployment of third party security applications
 - Supports large networking environments
- Services numerous industries, such as
 - Government
 - Energy
 - Financial Services
 - Healthcare
 - Higher Education
 - Mobile Operators



Crossbeam History

Over a Decade of Delivering Next Generation Security Platforms



Business Case

- Maintenance Business represents a Significant Portion of the Company Revenue
- Customer Satisfaction is critical to the Organizations success
- Operational optimization is a key factor in measuring the success of the business
- Eliminate missed revenue due to poor visibility to contract information

Business Needs

- Increased visibility of information to Crossbeam contract team and customers
- Streamline processing of information for Crossbeam personnel
- Streamline information handling between Crossbeam and customers
- Improve customer satisfaction in maintenance portion of the business

'Add On' Design Approach

- Provide improved information display
 - Comprehensive asset search screen
 - Customer asset dashboard with drill-down
 - Customer asset detailed screen, with folders
 - Quick action feature for renewal, copy etc.
 - Batch quoting for contract renewal
- Augment standard Oracle functionality
 - Drill-down capability
 - Export to, and Import from, Excel

Summary of Results

- Improved Customer Service
- Increased maintenance revenue due to improved access and visibility
- Reduced overhead cost per contract
- Reduced errors in Service Contracts
- Changed process from user maintenance tool to an information based processing approach.

Service Team Testimonials

“The single screen application is invaluable to our business because we have easy access to all of the information we need with the ability to quickly update and maintain our installed base.”

“The ability to import and export information for quotes is a valuable tool and makes things more efficient as some of our customers have thousands of assets”

“There are so many features that have enhanced our ability to manage high volumes of assets, such as batch cancellations, batch quoting, synchronizing start and end dates, and re-pricing”



Demo



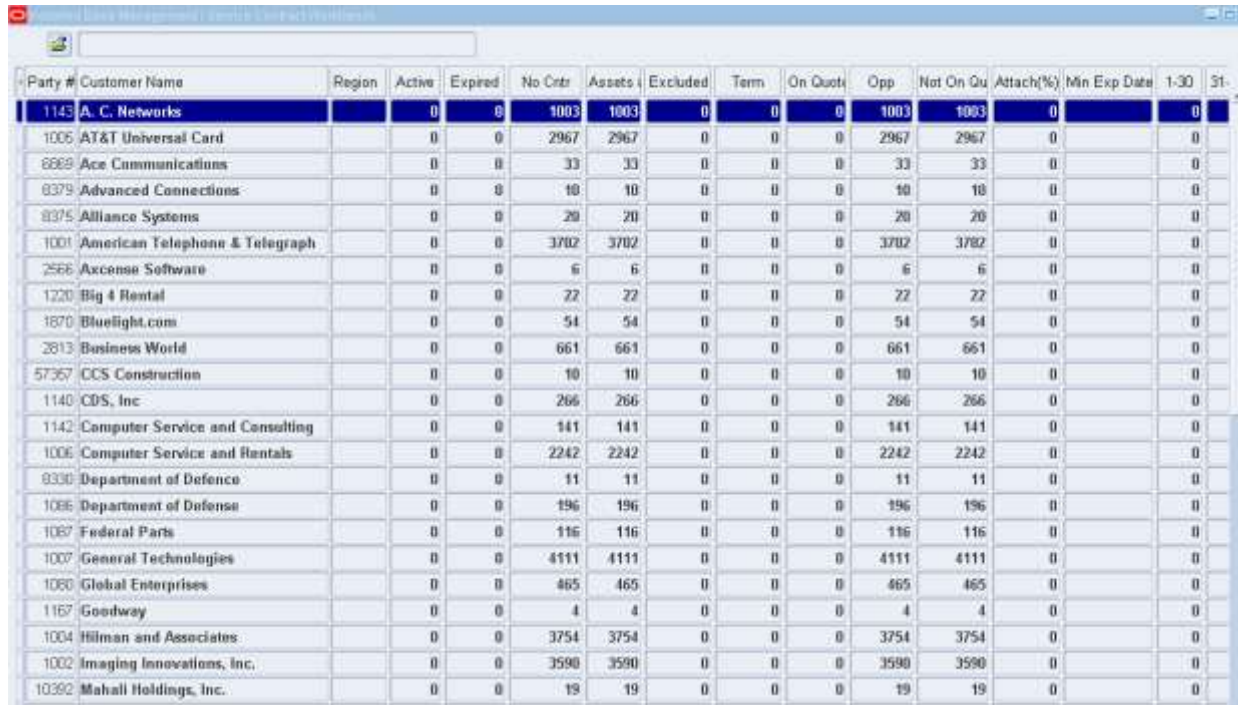
Search Screen

Total Active	Excluded	Entered Contract	Jun-12
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Expired <input type="text"/>	Expire (1-30 Days) <input type="text"/>	Active Contract <input type="text"/>	Jul-12 <input type="text"/>
No Contract <input type="text"/>	Expire (31-60 Days) <input type="text"/>	Expired Contract <input type="text"/>	Aug-12 <input type="text"/>
Total Quote <input type="text"/>	Expire (61-90 Days) <input type="text"/>		Sep-12 <input type="text"/>
Total Assets <input type="text"/>	Expire (>90 Days) <input type="text"/>		Oct-12 <input type="text"/>
Total Opp <input type="text"/>	Min Expire Date <input type="text"/>		Nov-12 <input type="text"/>
Total Term <input type="text"/>			After Nov-12 <input type="text"/>

Clear Cancel Find

- Search by more fields than standard Service Contracts

Customer Asset Dashboard



The screenshot displays a software window titled "Customer Asset Dashboard" with a search bar at the top. Below the search bar is a table with 16 columns: Party #, Customer Name, Region, Active, Expired, No Contr, Assets, Excluded, Term, On Quot, Opp, Not On Qu, Attach(%), Min Exp Date, 1-30, and 31-. The table lists various customers, with "A. C. Networks" highlighted in blue. The data is as follows:

Party #	Customer Name	Region	Active	Expired	No Contr	Assets	Excluded	Term	On Quot	Opp	Not On Qu	Attach(%)	Min Exp Date	1-30	31-
1143	A. C. Networks		0	0	1003	1003	0	0	0	1003	1003	0		0	
1005	AT&T Universal Card		0	0	2967	2967	0	0	0	2967	2967	0		0	
6669	Ace Communications		0	0	33	33	0	0	0	33	33	0		0	
8379	Advanced Connections		0	0	10	10	0	0	0	10	10	0		0	
8375	Alliance Systems		0	0	20	20	0	0	0	20	20	0		0	
1001	American Telephone & Telegraph		0	0	3702	3702	0	0	0	3702	3702	0		0	
2566	Axcense Software		0	0	6	6	0	0	0	6	6	0		0	
1220	Big 4 Rental		0	0	22	22	0	0	0	22	22	0		0	
1870	Bluelight.com		0	0	54	54	0	0	0	54	54	0		0	
2813	Business World		0	0	661	661	0	0	0	661	661	0		0	
57367	CCS Construction		0	0	10	10	0	0	0	10	10	0		0	
1140	CDS, Inc		0	0	266	266	0	0	0	266	266	0		0	
1142	Computer Service and Consulting		0	0	141	141	0	0	0	141	141	0		0	
1006	Computer Service and Rentals		0	0	2242	2242	0	0	0	2242	2242	0		0	
8330	Department of Defence		0	0	11	11	0	0	0	11	11	0		0	
1086	Department of Defense		0	0	196	196	0	0	0	196	196	0		0	
1087	Federal Parts		0	0	116	116	0	0	0	116	116	0		0	
1007	General Technologies		0	0	4111	4111	0	0	0	4111	4111	0		0	
1080	Global Enterprises		0	0	465	465	0	0	0	465	465	0		0	
1167	Goodway		0	0	4	4	0	0	0	4	4	0		0	
1004	Hilman and Associates		0	0	3754	3754	0	0	0	3754	3754	0		0	
1002	Imaging Innovations, Inc.		0	0	3590	3590	0	0	0	3590	3590	0		0	
10392	Mahall Holdings, Inc.		0	0	19	19	0	0	0	19	19	0		0	

- Drill-down capability on each data field
- Folder option available

Asset Drill-down Screen

Sr#	Item Number	Serial Number	Parent Sn#	IB Status	Contract #	Service Level	Start Date	End Date	Status	Add
1	FS66629	FS1012		CREATED						BI <input type="checkbox"/>
2	FS66629	FS1013		CREATED						BI <input type="checkbox"/>
3	FS66629	FS1014		CREATED						BI <input type="checkbox"/>
4	FS-LPTR-1000	FS1103		CREATED						BI <input type="checkbox"/>
5	FS-LPTR-1000	FS1104		CREATED						BI <input type="checkbox"/>
6	FS66629	FS2007		CREATED						BI <input type="checkbox"/>
7	FS66629	FS2008		CREATED						BI <input type="checkbox"/>
8	FS66629	FS2009		CREATED						BI <input type="checkbox"/>
9	FS90000	FS76100	FS1012	CREATED						BI <input type="checkbox"/>
10	FS90000	FS76101	FS1013	CREATED						BI <input type="checkbox"/>

Contract Number	Contract Number Modifier	Start Date	End Date	Status	Select
21932	R13-SEP-06 12:56:59	08-OCT-2006	07-OCT-2010	ACTIVE	<input type="checkbox"/>
21217	R17-AUG-07 06:13:37	25-JUN-2009	24-JUN-2010	ACTIVE	<input type="checkbox"/>
21217	R21-SEP-06 17:21:12	25-JUN-2005	24-JUN-2009	ACTIVE	<input type="checkbox"/>
21932		08-OCT-2004	07-OCT-2006	ACTIVE	<input type="checkbox"/>

Selected product(s) Refresh Quote Data (Yes /No) Action

1004	Hilman and Associates	0	0	Generate Quote	0	0	3754	3754	0
1002	Imaging Innovations, Inc.	0	0	Delete Contract	0	0	3590	3590	0
10392	Mahali Holdings, Inc.	0	0	Renew Contract	0	0	19	19	0
1088	Modern Truck	0	0	Consolidate Contracts	0	0	184	184	0
				Copy Contract					
				Not Renewable Product					

Go Close

Asset Drill-down Features

- Data sorting capability on each field
- Further Drill-down functionality
 - Serial Number
 - Service Contract Number
 - Order Number
- View in Tabular format for Export to Excel
- Powerful functionality in 'Action List' to automate further processing

Serial Number Drill-down

Serial Number Lookup

Instance ID: 20880 Item Number: C25-4CBF Serial Number: KK606520031

Installation Details Parties Contracts Product Transactions Serial Transactions Owner History Status History Configuration Cases Note

Owner Name: 8530 Goodway Product Status: New Install Update

SFDC Account: Term Reason: Requested By:

Current Location

Party Number: 8530 Party Name: Goodway

Address1: Bunsenstrasse 29 Address2:

City: Kiel State:

Postal Code: 24145 Country: Germany

Install At Location

Party Number: 8530 Party Name: Goodway

Address1: Bunsenstrasse 29 Address2:

City: Kiel State:

Postal Code: 24145 Country: Germany

Last Order

Order Number: 105195 Line Number: 5

Book Date: 17-MAY-2007 Ship Date: 18-MAY-2007

PO Number: B178828

Service Contract Number Drill-down

Contract Number: CBS0005926 **Renew** Version: 0.2 Template Status: Entered Subtotal: 109,752.00

Known As: Start Date: 01/01/2012 End Date: 12/31/2012 Tax: 0.00

Order: Duration: 1 Period: YEAR Total: 109,752.00 USD

Short Description: Renewal 2012 Category: Service Agreeme Terminated: 0.00

Summary Lines

Accounts Effectivities Pricing / Products Tag / Payment Options Counters Events

Line Number	Line Type	Name	Duration	Period	Last Contract Price	Subtotal	Tax	Invoice Print Flag
1	Service	CP-FD-NPM6-R	1 YEAR	0.00		15,792.00	0.00	15,792.00
2	Service	CBS-CT-NPM6L-PREM-R	1 YEAR	0.00		28,800.00	0.00	28,800.00
3	Service	CBS-CT-CPM-PREM-R	1 YEAR	0.00		15,960.00	0.00	15,960.00
4	Service	CBS-CT-X45-PREM-R	1 YEAR	0.00		2,400.00	0.00	2,400.00
5	Service	CBS-CT-X80-PREM-R	1 YEAR	0.00		7,200.00	0.00	7,200.00
6	Service	CBS-CT-APM-PREM-R	1 YEAR	0.00		32,400.00	0.00	32,400.00

Price Break Price Calculation Reprice Billing

Effectivity Pricing Administration

Line Number	Level	Name	Serial Num	Line Ref	Start Date	End Date	Duration	Period	Dat
2.1	Product	NPM 8620 0TG10G	N012L115		01/01/2012	12/31/2012	1 YEAR		
2.2	Product	NPM 8620 0TG10G	N945L145		01/01/2012	12/31/2012	1 YEAR		
2.3	Product	NPM 8620 0TG10G	N012L119		01/01/2012	12/31/2012	1 YEAR		
2.4	Product	NPM 8620 0TG10G	N012L108		01/01/2012	12/31/2012	1 YEAR		

Description: 5 Gbps Network Processing M Invoice Text: Counter Product Details

Export/Import Process

- Select 'Quick' Action and adjust data as desired
- View Tabular data view
- Export data to Excel
- Edit data in Excel, customer or Crossbeam
- Import data from Excel using ADI

Export/Import Process – Web ADI Integration

The screenshot shows an Excel spreadsheet with a context menu open over the 'Upload' button. The menu options are: Oracle, List of Values, Upload, Monitor, and About. The spreadsheet data is as follows:

Upl	ROW_NUMBER	ITEM NUMBER	SERIAL NUMBER	SERVICE ITEM	START DATE	END DATE	NEGOTIATED PRICE	
	11	X80-AC-3	KK12345	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	12	X80-AC-3	KK12346	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	13	X80-AC-3	KK12347	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	14	X80-AC-3	KK12348	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	15	X80-AC-3	KK12349	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	16	X80-AC-3	KK12350	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	17	X80-AC-3	KK12351	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	18	X80-AC-3	KK12352	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	19	X80-AC-3	KK12353	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊
	20	X80-AC-3	KK12354	CBS-X80-PREM	1-Jan-12	31-Dec-12	12451	😊

Tip: This is not the end of the Template. Unprotect the sheet and insert as many rows as needed.

- Excel sheet used to edit data

Import Process – Import with Copy-Paste from Excel

Generate New Quote

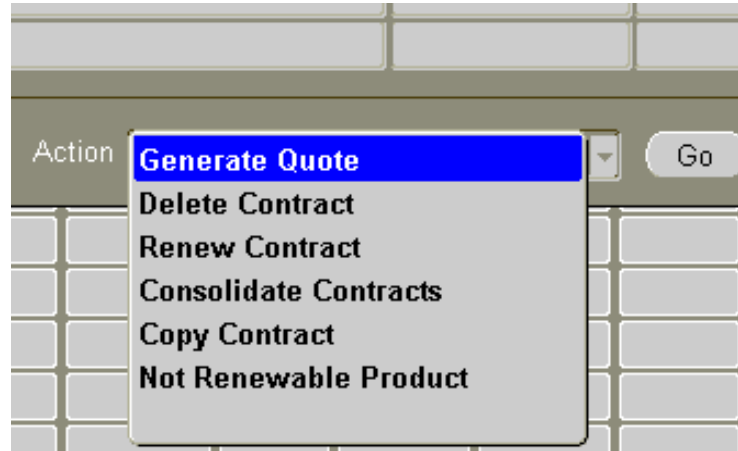
X80-AC-3 G834F024	CBS-CT-X80-PREM-R	1-Jan-2011	31-Dec-2014	4500	
X80-AC-3 G834F007	CBS-CT-X80-PREM-R	1-Jan-2011	31-Dec-2014	7649	
CPM-8600-2HDD-RAID1	L828C090	CBS-CT-CPM-PREM-R	1-Jan-2011	31-Dec-2014	8876
CPM-8600-2HDD-RAID1	L828C027	CBS-CT-CPM-PREM-R	1-Jan-2011	31-Dec-2014	2627
APM-8600-2DCX-4G	L816A444	CBS-CT-APM-PREM-R	1-Jan-2011	31-Dec-2014	5422
APM-8600-2DCX-4G	L816A357	CBS-CT-APM-PREM-R	1-Jan-2011	31-Dec-2014	5521
APM-8600-2DCX-4G	L816A301	CBS-CT-APM-PREM-R	1-Jan-2011	31-Dec-2014	9836
APM-8600-2DCX-4G	L815A085	CBS-CT-APM-PREM-R	1-Jan-2011	31-Dec-2014	3721
NPM-8600-2TG10G	G837B047	CBS-CT-NPM6-PREM-R	1-Jan-2011	31-Dec-2014	2385
NPM-8600-2TG10G	G837B083	CBS-CT-NPM6-PREM-R	1-Jan-2011	31-Dec-2014	3321

Excel data sheet Template
1. Item Number 2. Serial Number 3. Service Item

Refresh contract line data

Populate Cancel

Quick 'Action' List



- Select 'Action' to start automated process

'Generate Quote' – Create

- Can create New or add to Existing Contract
- Features include
 - Sync of Start Date, End Date
 - Adding Discount/Surcharge at top level, service or Line Level
 - Import Data from Excel File using Web ADI or Copy-Paste
 - Service item replacement and more.....

'Prepare Quote'

Quote for (Customer: Bluelight.com, Region)

Type: New Contract Batch ID: 201208042347 Start Date: 01-JUN-2012 End Date: 31-MAY-2013

Contract #: Modifier: Renewal Multi Site: Duration: 1 Year End Customer:

Ship To: Bill To: Actions:

Name: Bluelight.com Name: Bluelight.com Select Action Type: Go

Account: 1658 Location: 5710 Account: 1658 Location: 5708 Show Error Close

Address: 64 5th St San Francisco, CA, 94103, US Address: 64 5th St San Francisco, CA, 94103, US

Product Information

Sr#	Item Number	Serial Number	Parent Sn	Service Name	Start Date	End Date	Duration	Price	Orig Price	% Amount	Process
1	FS-HVPWS-0255	PS9962		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
2	FS-HVPWS-0255	PS9961		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
3	FS-HVPWS-0255	PS9962		FSPM1500	01-JUN-2012	31-MAY-2013				0 Y	✓
4	FS-HVPWS-0255	PS9963		FSPM1500	01-JUN-2012	31-MAY-2013				0 Y	✓
5	FS-HVPWS-0255	PS9964		FSPM1500	01-JUN-2012	31-MAY-2013				0 Y	✓
6	FS-HVPWS-0255	PS9963		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
7	FS-HVPWS-0255	PS9964		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
8	FS-HVPWS-0255	PS9965		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
9	FS-HVPWS-0255	PS9966		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
10	FS-HVPWS-0255	PS9967		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
11	FS-HVPWS-0255	PS9968		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
12	FS-HVPWS-0255	PS9969		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
13	FS-HVPWS-0255	PS9969		FSPM1500	01-JUN-2012	31-MAY-2013				0 Y	✓
14	FS-HVPWS-0255	PS9960		SUPPORT-AP-PLATINUM	01-JUN-2012	31-MAY-2013				0 Y	✓
15	FS-HVPWS-0255	PS9960		FSPM1500	01-JUN-2012	31-MAY-2013				0 Y	✓

'Prepare Quote' cont

Quote for (Customer: Bluelight.com, Region)

Type: New Contract Batch ID: 201206042347 Start Date: 01-JUN-2012 End Date: 31-MAY-2013
Contract #: Modifier: Renewal Multi Site: Duration: 1 Year End Customer:

Ship To: Bill To:

Name: Bluelight.com Name: Bluelight.com
Account: 1658 Location: 5710 Account: 1658 Location: 5708
Address: 64 5th St, San Francisco, CA, 94103, US Address: 64 5th St, San Francisco, CA, 94103, US

Actions:

- Select Action Type
- Sync Start Date
- Sync End Date
- Sync All Dates
- Update Default Price
- Import Data from File
- Update Component with \$0
- Grouping Sort

Product Information

Sr#	Item Number	Serial Number	Parent Sn	Service Name	Start Date	End Date	Duration	P
1	FS-HVPWS-0255	PS9962		SUPPORT-AP-PLATINUM	01 JUN 2012	31 MAY 2013		

Surcharge: amount: Process: 0 Y

'Quote Pricing and Billing' cont

Quote for (Customer:Bluelight.com, Region)

Type: New Contract Batch ID: 201206042347 Start Date: 01-JUN-2012 End Date: 31-MAY-2013

Contract #: Modifier: Renewal Multi Site Duration: End Customer

Ship To: Name: Bluelight.com Account: 1658 Location: 5710 Address: 64 5th St San Francisco, CA, 94103, US

Bill To: Name: Bluelight.com Account: 1658 Location: 5708 Address: 64 5th St San Francisco, CA, 94103, US

Actions: Select Action Type [Go] Show Error [Close]

Product Information

Sr#	Item Number	Serial Number
1	FS.HVPWS-0255	PS9962
2	FS.HVPWS-0255	PS9961
3	FS.HVPWS-0255	PS9962
4	FS.HVPWS-0255	PS9963
5	FS.HVPWS-0255	PS9964
6	FS.HVPWS-0255	PS9963
7	FS.HVPWS-0255	PS9964
8	FS.HVPWS-0255	PS9965
9	FS.HVPWS-0255	PS9966
10	FS.HVPWS-0255	PS9967
11	FS.HVPWS-0255	PS9968
12	FS.HVPWS-0255	PS9969
13	FS.HVPWS-0255	PS9969
14	FS.HVPWS-0255	PS9960
15	FS.HVPWS-0255	PS9960

Price/Billing

Agreement: Accounting Rule: Immediate

Price List: Business_Data Payment Terms: 30 NET

Sales Person: Andrew Weinstein Transaction Type: Invoicing Rule: Advance Invoice

PO Number: PO 53216521

Service Name	New Service	Price Modifier	Value	Value Type	Price Update
FSPM1500	WR18533	Discount	15	Percent	<input checked="" type="checkbox"/>
SUPPORT-AP-PLATINUM		Discount	10	Percent	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
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					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Price Modifier: Overwrite Discount Yes/No

Value: Exclude \$0 Lines for Discount/Surcharge Yes/No

Value Type: [Apply] [Cancel]

Charge Int Process

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

0 Y 0 Y 0 Y

'Non Quoted Assets'

Customer Name **Blueflight.com** Start Date End Date

Sr#	Item Number	Serial Number	Parent Sr#	IB Status	Contract #	Service Level	Start Date	End Date	Status	Add	
1	FS66629	FS1012		CREATED						BI <input checked="" type="checkbox"/>	
2	FS66629	FS1013		CREATED						BI <input checked="" type="checkbox"/>	
3	FS66629	Not Renewable Product									BI <input checked="" type="checkbox"/>
4	FS-LPTR										BI <input checked="" type="checkbox"/>
5	FS-LPTR										BI <input checked="" type="checkbox"/>
6	FS66629										BI <input checked="" type="checkbox"/>
7	FS66629										BI <input checked="" type="checkbox"/>
8	FS66629										BI <input checked="" type="checkbox"/>
9	FS90000										BI <input checked="" type="checkbox"/>
10	FS90000										BI <input checked="" type="checkbox"/>

Not Renewable Product

Install Base Status: Change Product Status: (Yes/No)

Reason Code: Remove from Quote: (Yes/No)

Requested By: Cancellation Email: (Yes/No)

Role	Party Name	Contact Name	Email Address	Send Type	Send
				TO	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>


Contract Number: 21932, 21217, 21217, 21932

08-OCT-2004 07-OCT-2006 ACTIVE

'Copy Contract'

Assets Detail

Customer Name Start Date End Date

Sr#	Item Number	Serial Number	Parent Sn#	IB Status	Contract #	Service Level	Start Date	End Date	Status	Add
1	FS66629	FS1012		CREATED						BI <input checked="" type="checkbox"/>
2	FS66629	 Copy Contract								BI <input checked="" type="checkbox"/>
3	FS66629									BI <input checked="" type="checkbox"/>
4	FS-LPTR-1000									BI <input checked="" type="checkbox"/>
5	FS-LPTR-1000									BI <input checked="" type="checkbox"/>
6	FS66629									BI <input checked="" type="checkbox"/>
7	FS66629									BI <input checked="" type="checkbox"/>
8	FS66629									BI <input checked="" type="checkbox"/>
9	FS90000									BI <input checked="" type="checkbox"/>
10	FS90000	FS76101	FS1013	CREATED						BI <input checked="" type="checkbox"/>

New Number New Modifier

Start Date End Date

Duration Period

'Renew Contract'

The screenshot shows a software application window with a table of contracts and a modal dialog box titled "Renew Contract".

Contract List Table:

Sr#	Item Number	Serial Number	Parent Sr#	IB Status	Contract #	Service Level	Start Date	End Date	Status	Add
1	FS66629	FS1012		CREATED						BI ✓
2	FS66629									BI ✓
3	FS66629									BI ✓
4	FS-LPTR-1000									BI ✓
5	FS-LPTR-1000									BI ✓
6	FS66629									BI ✓
7	FS66629									BI ✓
8	FS66629									BI ✓
9	FS90000									BI ✓
10	FS90000	FS76101	FS1013	CREATED						BI ✓

Renew Contract Dialog Box:

New Number: 21932
New Modifier: Renewal
New Start Date: 08-OCT-2010
New End Date: 30-SEP-2013
Duration: 1
New Period: Year

Buttons: Renew, Cancel

Contract Details Table:

Contract Number	Contract Number Modifier	Start Date	End Date	Status	Select
21932	R13-SEP-06 12:56:59	08-OCT-2006	07-OCT-2010	ACTIVE	☑
21217	R17-AUG-07 06:13:37	25-JUN-2009	24-JUN-2010	ACTIVE	☐
21217	R21-SEP-06 17:21:12	25-JUN-2005	24-JUN-2009	ACTIVE	☐
21932		08-OCT-2004	07-OCT-2006	ACTIVE	☐

'Generate Quote' – Review



SERVICE QUOTE

Corporate Headquarters 80 Central Street Boxborough, MA 01719 Phone: 978-318-7500 Fax: 978-287-4210	Quote#	CBS0005925_Renewal 2012
	Page	1 of 2
	Date	07-JUN-2012
	Contract#	CBS0005925
	Sales Person	Antinori, Ron
	Prepared By	Ravi Tripathi

Ordering Party	Reseller	End Customer
Hilman & Associates Lago Alberto 366 Mexico City 11320 Mexico		Imaging Innovation Inc Rios Rosas, 26 Madrid 28003 Spain

Line	Qty	Item#	Serial#	Start Date	End Date	List Price/Yr	Months	Price/Month	Ext. Price
1	1	CBS-FD-X80-R							\$6,120.00
		Product: X80-DC-2							
			F7380013	01-Jun-12	31-May-13	\$3,600.00	12	\$255.00	\$3,060.00
			F7380015	01-Jun-12	31-May-13	\$3,600.00	12	\$255.00	\$3,060.00



Batch Quoting - Features

- Auto Re-pricing
- Auto Old-New service item replacement based on mapping
- Auto Attribute Cascading
- Auto QA Check
- Auto Quote report generation

Batch Quoting – Auto QA Check

Batch Quote

Generate Quote Search Quote

Contract#	Modifier	Start Date	End Date	Status	Price List	Ordering Party	Reseller	End Customer	Region	SalesRep
CBS0005261	Renew - 1206071347	01-Jan-12	31-Dec-13	ENTERED	EMEA_WEST	eN Motion	RIM Company	Imaging Innovati	EMEA	Gordillo, R

Party/Contacts

Role	Role Name	Contact Name	Email Address
Ordering Party	eN Motion	Hernandez, Espino	[Redacted]
Ordering Party	eN Motion	Garcia, Marta	[Redacted]
End Customer	Imaging Innovation Inc	Salamanca, Jose Manuel	[Redacted]

Print Quote
Run QA
Generate Quote

QA Details

Process Name	Process Description	Status
CBS Check Payment Term	CBS Check Payment Terms	Contract payment terms (30 NET) is not same as customer payment terms (60 Net).
Check Covered Level Over	Check Covered Level Overlap	4.1, Product is also in Contract: CBS0005427(8.2, Product)
CBS Check AR Interface O	CBS Check AR Interface Option	Contract is not eligible for invoice. Please check AR interface option.

 Passed

 Warning

 Failed

Batch Quote Report



SERVICE QUOTE

Corporate Headquarters 80 Central Street Boxborough, MA 01719 Phone: 978-318-7500 Fax: 978-287-4210	Quote#	CBS0005925_Renewal 2012
	Page	1 of 2
	Date	07-JUN-2012
	Contract#	CBS0005925
	Sales Person	Antinori, Ron
	Prepared By	Ravi Tripathi

Ordering Party	Reseller	End Customer
Hilman & Associates Lago Alberto 366 Mexico City 11320 Mexico		Imaging Innovation Inc Rios Rosas, 26 Madrid 28003 Spain

Line	Qty	Item#	Serial#	Start Date	End Date	List Price/Yr	Months	Price/Month	Ext. Price
1	1	CBS-FD-X80-R							\$6,120.00
		Product: X80-DC-2							
			F7380013	01-Jun-12	31-May-13	\$3,600.00	12	\$255.00	\$3,060.00
			F7380015	01-Jun-12	31-May-13	\$3,600.00	12	\$255.00	\$3,060.00



Batch Quote 'Welcome'



Service Contract Number: CBS0005925
Contract Date: 01-Jun-12 To 31-May-13
Ordering Party PO#:
Ordering Party: Hilman & Associates
End-User: Imaging Innovation Inc

Welcome!

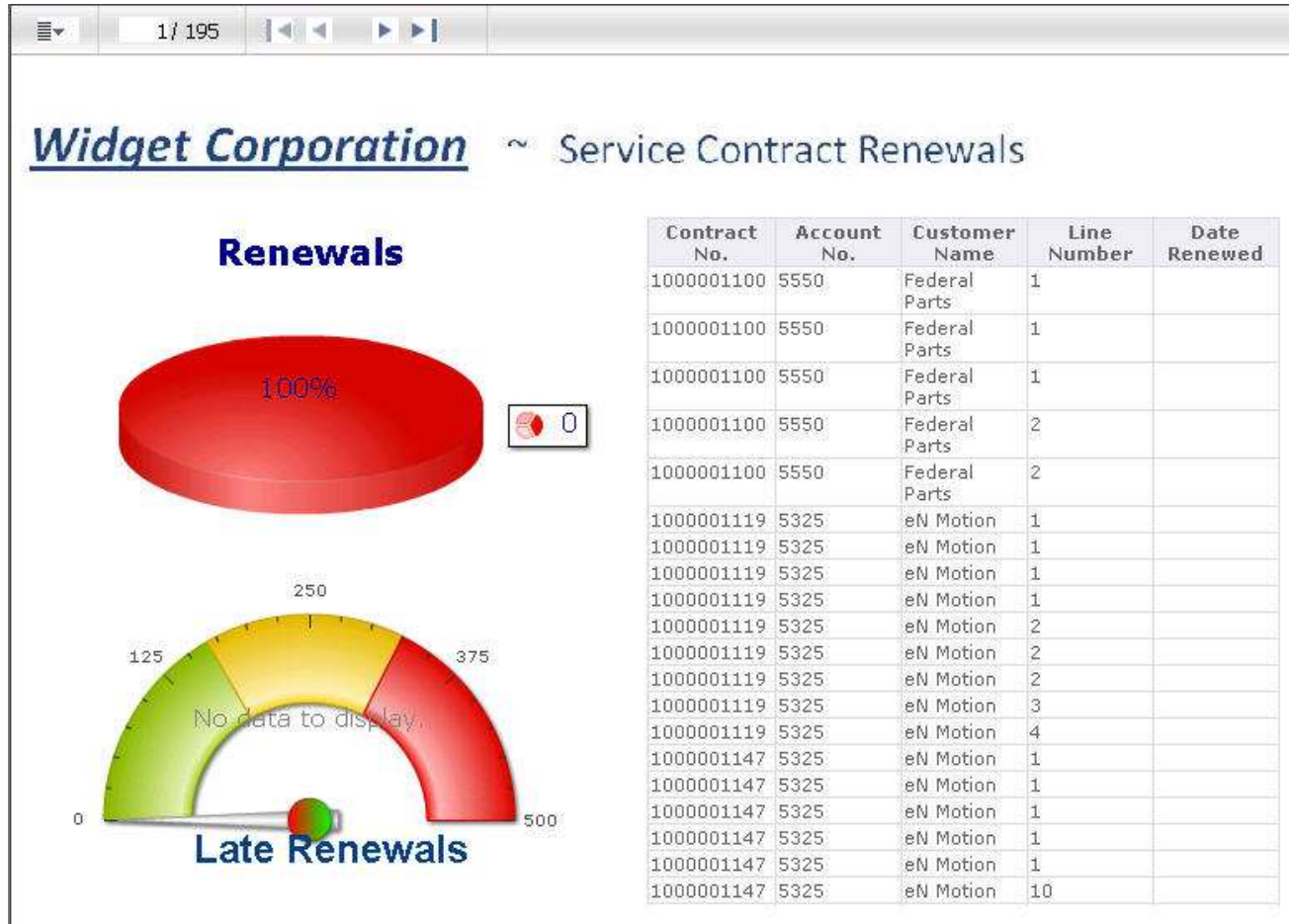
Congratulations on your purchase of a Crossbeam solution! We pride ourselves on delivering industry-leading technical support, and are committed to ensuring that each customer realizes the most out of their Crossbeam investment.

Crossbeam's experienced support team is dedicated to providing you with the best in service and peace of mind - 24 hours per day, 7 days per week. Your purchase of a support contract entitles you to access our service portfolio, including the following key features:

- Additional 'Welcome' document automatically created



BI Report - Renewals

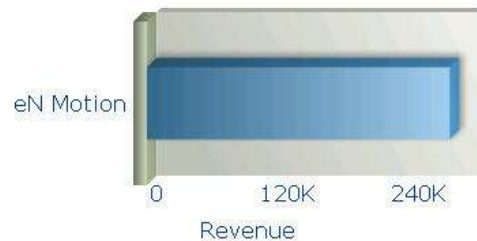


BI Report - Revenue

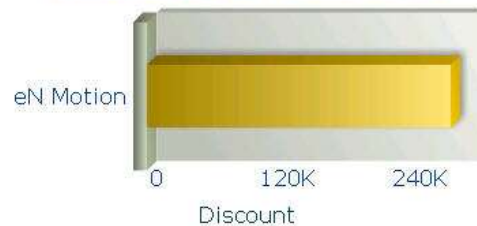
Widget Corporation ~ Service Revenue



Customer by Revenue



Customer by Discount



Contract Number	Customer Name	Line Start Date	Line End Date	Currency Code	Negotiate Price
100000195	AT&T Universal Card	Aug 1, 2009 12:00 AM	Jul 31, 2010 12:00 AM	USD	159.60
100000531	Mahali Holdings, Inc	Jan 1, 2010 12:00 AM	Dec 31, 2010 12:00 AM	USD	0.00
100000369	Federal Parts	Oct 1, 2009 12:00 AM	Sep 30, 2010 12:00 AM	USD	3162.28
100000503	RIM Company	Dec 1, 2003 12:00 AM	Jun 30, 2010 12:00 AM	USD	663.35
100000503	RIM Company	Dec 1, 2003 12:00 AM	Jun 30, 2010 12:00 AM	USD	893.22
100000503	RIM Company	Dec 1, 2003 12:00 AM	Jun 30, 2010 12:00 AM	USD	15938.47
100000527	Federal Parts	Oct 1, 2010 12:00 AM	Sep 30, 2011 12:00 AM	USD	8390.40
100000325	Federal Parts	Aug 1, 2009 12:00 AM	Sep 30, 2010 12:00 AM	USD	0.00
100000531	Check Point LTD.	Jan 1, 2010 12:00 AM	Jun 30, 2011 12:00 AM	USD	6948.30
100000523	Axcense Software	Nov 1, 2009 12:00 AM	Oct 31, 2010 12:00 AM	USD	4842.50
100000523	Axcense Software	Nov 1, 2009 12:00 AM	Oct 31, 2010 12:00 AM	USD	3434.40
100000325	Federal Parts	Oct 1, 2009 12:00 AM	Jun 30, 2010 12:00 AM	USD	0.00
100000526	Westcon	Jul 1, 2009 12:00 AM	Dec 31, 2010 12:00 AM	USD	0.00

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Thank You !

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Ravindra Tripathi, Rtripathi@crossbeam.com

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Tailored Solutions**



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Questions ?

