Dynamics 365 - Service Contracts Quick Guide

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Service Contracts Quick Guide

1. Navigate to Service Contracts in the left side of the screen

2. Change view from Active Services to Pending Service Contracts

3. Click into the reference to open the record

4. If a service contract has already been manually created, Terminate the record through the Status Reason at the top right of the screen, then Deactivate in the toolbar.

5. If you are going ahead, check the data pulled through from the opportunity is correct

6. Check the account is correct

7. Complete reference field, first using the account name, then a break, company initials and product type. For e.g. Test Account |SY Pathways

8. Complete remaining fields in the Service Contracts Details area

9. FRN details are locked within Service Contracts, this information will need to updated on the account.

10. Documentation and Files Link not used – Use Timeline to add notes & attachments.

11. Check Products are correct on the right side. If you have any licences distinctively different, create a separate service contract manually.

12. Click into the opportunity if needed through the originating opportunity link

13. Complete important dates and payment information

14. Record communication with the client through the timeline

15. When you have completed all relevant fields, set the status reason to Active

16. **ONE OFF ONLY** - When adding a one-off payment, select One-off in the Payment Frequency field

17. Select Non-Automated

18. Click through to the Product line to amend the details

19. Make sure the correct price is added

20. Zero off the quantity, this ensures the amount doesn’t reoccur.

21. Navigate back to the Service Contract using the top left arrow

22. Click into Status Reason at the top right, click the calculate icon next to Monthly Contract Total to update to zero.

23. Once the invoice has been paid, select @Project Completed’ in the status reason

24. Deactivate in the top toolbar

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Important Notes:

Essential Fields

When setting up a service contract, make sure to complete the payment method and payment frequency fields, as these are crucial for reporting. If these fields are left blank, they will not appear in reports. For instance, if you're waiting on a DDM, temporarily select a monthly payment frequency and a payment method until the information is available.

Suggested Fields

Dynamics includes a smart feature that suggests options for certain fields. However, these suggestions must be confirmed before saving. Suggested options appear in blue, review and confirm or discard these suggestions before saving the record.