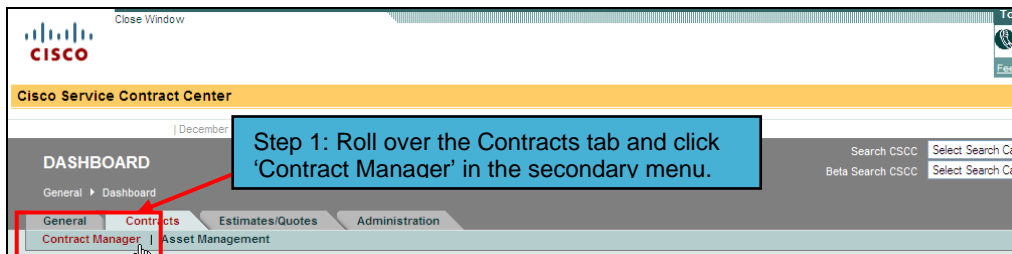


Setting Filters in Contract Manager

Objective: This tip sheet will show you how to set filters in Contract Manager. In the 'Contract Manager' screen, you can enter and set your filter criteria to search for specific data. Filters allow you to search for multiple items which contain similar characteristics (i.e. all contracts with a selected service level or coverage date range).

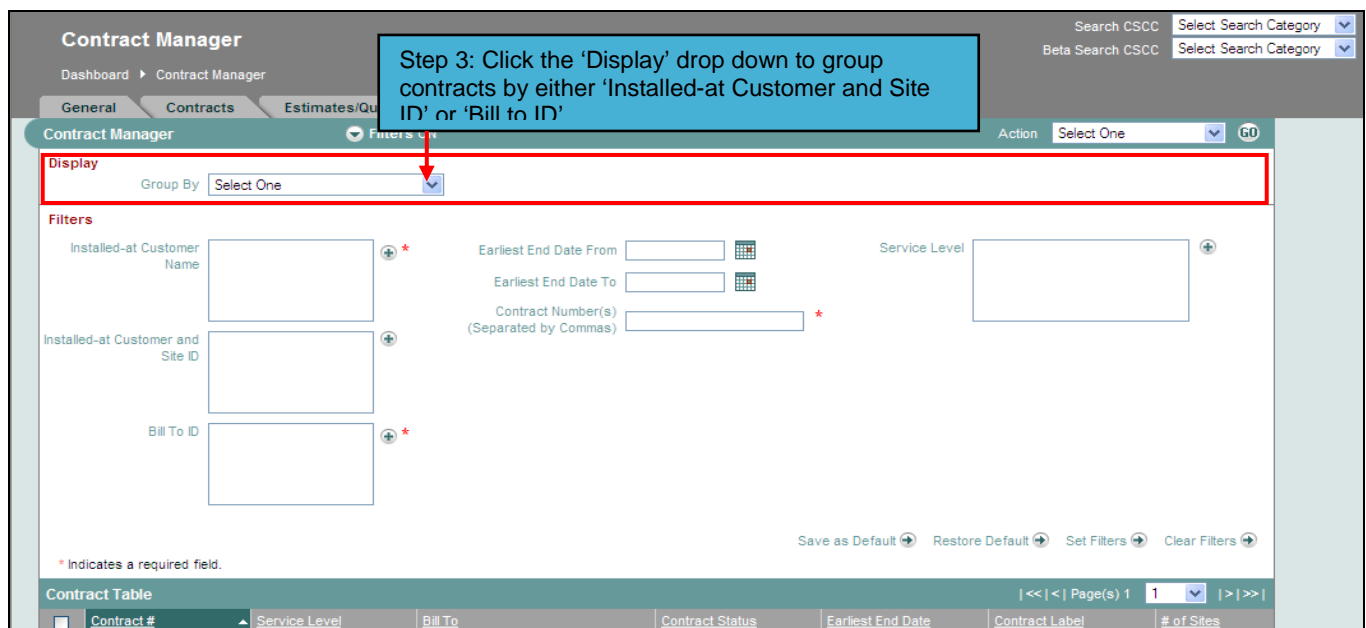
Steps to Set Filters in Contract Manager:

1. Roll over the 'Contracts' tab and click 'Contract Manager' on the secondary menu..



2. On the 'Contracts Manager' screen, click the expand/collapse arrow to display the 'Filters' feature.
3. Click the 'Display' drop down to group contracts by either 'Installed-at Customer and Site ID' or 'Bill to ID'. This will allow you to view your contracts primarily by the partner you purchased them from or by the specific installed-at location for the equipment.
4. Once the 'Filters' are available, you can initiate a search for contracts based on various filter options: 'Installed at Customer Name', 'Bill to ID', 'Installed at Customer and Site ID' 'Contract Number', 'Earliest End Date From/To', and 'Service Level'.

Note: You should use the 'Earliest End Date From' and 'Earliest End Date To' fields to search for any contracts which may be expiring in a given time frame. This will help you to proactively view when you will need to request to have your service renewed.



- Click a selector icon to enter a specific ID, site, or service level if needed. When selector icons are adjacent to a filter field, information can not be entered manually and the selectors must be used.
- After the appropriate information is entered, select 'Set Filters'.

Note: You also have the option to set the applied filters as your default contract manager view by selecting 'Save as default'. You can also select 'Restore Default' or 'Clear Filters' to change your default view.

- Results will appear at the bottom of the screen in the 'Contract Table' which match the entered criteria.

Contract Table								Page(s) 1
<input type="checkbox"/>	Contract #	Service Level	Bill To	Contract Status	Earliest End Date	Contract Label	# of Sites	
<input type="checkbox"/>	2599369	SBAR3	LD TECHNOLOGY	ACTIVE	14-Sep-2008		1	
<input type="checkbox"/>	3111758	SAS	LD TECHNOLOGY	ACTIVE	26-Jun-2009		1	

- From the Contract Table, you can select a 'Contract #' hyperlink to open that specific contract.
- To download the contract details of the contract(s) that appear in the Contract Table, select the contract checkboxes and click 'Download Contract List' from the Action drop down (available in the upper right-hand corner of the screen).

Related Links

CSCC Search Tools Tip Sheet: [Click Here](#)
 Contract Management Tip Sheet: [Click Here](#)
 CSCC Training Website: [Click Here](#)