Infor CloudSuite Industrial Service User Guide

Important Notices

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About Infor CloudSuite Service

The Infor CloudSuite Service management solution works with many different service industries. It is flexible enough to work in different service environments because of the parameters that you can set up, so you must understand all of the available options before you start setting up your system. The Infor CloudSuite Service parameters determine how the system defaults certain data elements, processes transactions, and shortcuts certain tasks. Most of the codes used in Infor CloudSuite Service are user-defined, so you can create industry-specific terms for reason codes, resolution codes, priority codes, etc. Often it is helpful to use an implementation consultant to determine the best way to configure the system for your type of business.

The Infor CloudSuite Service module includes these major areas:

- Incidents
- Units
- Service orders and scheduling
- Service Contracts

About Incidents (Call Center)

Use the Call Center to record phone calls, log issues, dispatch service engineers, resolve issues, and build a searchable database (knowledge base) of information to assist with future recurring issues. The Call Center works for both service departments that resolve issues by dispatching a service technician or those that resolve most issues over the phone.

The structure of the Call Center includes these areas:

- **Incidents:** An incident is created by the service support representative to record customer contact and unit information for items that your company supports. A support representative uses a reason code to classify the incident. The first line of support at this point can be to use the **incident activities** attached to the reason codes to resolve the issue.
- **Events:** Events record all transactions that occur during the life of an incident, for example, phone calls, e-mails, dispatching a service technician or creating a SRO. You can define a set of **event activities**, similar to a checklist of tasks, that the **event owner** (the person trying to resolve the problem) can attempt when trying to resolve the incident.
- **Service Request Orders (SROs):** These orders are created to collect all costs related to resolving an incident. SROs are also used to bill customers for items used to resolve incidents.

For more information about incidents, see Using the Call Center to Add and Track Incidents.

About Units (Asset Management)

Units are serial-tracked items that your company services. A unit may or may not exist in the standard Infor CloudSuite serial master. Units can be added to the system in several different ways:

- Run utilities that create the unit upon the completion of a job when the finished goods are put into inventory. These utilities can be run every night on the Background Queue, to pick up any new units that have been created during the previous day.
- Select the **Auto Create Unit on Shipment** field in the **Service Parameters** form to automatically create new units whenever a serial-tracked item is shipped on a customer order.
- Create a unit manually with the **Units** form.

About Service Orders and Scheduling

When work needs to be performed that requires materials, labor, or other miscellaneous expenses, you create a **Service Request Order (SRO)**. The SRO is used to track expenses and to invoice the customer for any non-warranty items. The SRO allows for multiple lines and items, so you can include different types of service calls on one order. For example, service on larger items could use one line item with multiple operations (tasks). Service orders on smaller items could have multiple line items with only a few operations.

For more information about Service Orders, see Using SROs to Track Service Requests, Transactions, and Billing.

About Service Contracts

You can use contracts to track maintenance agreements for a customer. Contracts include a user-definable service type that identifies the level of service that the customer purchased. You can set up multiple units (serial-tracked service items) under one contract, in situations where a customer wants to receive only one invoice.

The pricing of a contract is set by one of these methods:

- **Fixed amount:** This is determined by specifying the annual amount of the contract.
- **Calculated amount:** This is determined by accumulating the amounts for each contract line item, and lets you charge different rates for different types of units or services under one contract.

Contracts can be billed monthly, bi-monthly, quarterly, semi-annually, or annually. You can run a report that lists customers whose contracts are up for renewal. When the contract is invoiced, standard A/R information is created so the invoice flows directly into the customer's outstanding balance in the back office system.

For more information about Contracts, see Using Contracts to Track Maintenance Agreements for Customers.

Call Center (Incidents)

Setting up the System for Incidents

Use these steps to set up your system to handle incidents:

1. Set up Incident Status Codes.
2. Set up Priority Codes that establish response times for incidents.
3. Set up Escalation Tasks.
4. Set up Service Parameters (Call Center tab).
5. Set up Service Reasons and activities.
6. Set up Service Resolutions.
7. Set up Incident Event Codes.
8. Set up Partners.
9. Set up Knowledge Base Categories.

Setting Up Service Status Codes

On the **Service Status Codes** form, specify this information to set up codes that describe various incident statuses, for example, Open, Closed, Assigned, and On Hold.

To add a new code:

1. On the form, select Actions > New.
2. Specify this information:

Status Code

Specify the current condition of an incident. The default status code value that will be used in incidents is set in the **Service Parameters** form.

Description

Specify a description of what the status code represents.

Closed

Select this option for any incident status code that should be marked as "closed." For example, you could create codes named Closed and Canceled. You want both codes to indicate that the incident is closed. Select this option for both codes. Then when either of these status codes are selected on

an incident, the incident is then closed upon performing a save. After an incident is closed, all fields on the **Incidents** form are display-only, except the Status field.

Ignore Alert

Select this option for any code that should ignore "late" alerts in the Incident Queue Console. For example, the status code "On Hold Waiting on the Customer" can ignore alerts.

3 Save the new record.

About the Status History

The status history of an incident is visible on the **Incident Status History** form.

If Microsoft MapPoint is installed and the GPS feature is enabled, you can plot the status history as a route or as push pins in MapPoint.

Setting Up Priority Codes that Establish Response Times for Incidents

On the **Service Priority Codes** form, specify this information to set up codes that describe incident priorities, for example High, Low, Medium, and Urgent.

To set up a new code:

1 Specify this information:

Priority Code

Specify a code that defines the urgency of the incident. The default priority code value that will be used in incidents is set in the **Service Parameters** form. See also the section on "How Default Priority Codes are Determined" in About Incident Escalation.

Description

Specify a description that explains the priority code.

Days Until

Use these fields to establish default response times for an incident of a certain priority. For example, a "Medium" priority can be configured to warn after 7 days, be late after 15 days, and prompt for follow up after 30 days, and a "High" priority can follow up within 8 hours, warn after 2 days, and be late after 3 days. Provide values in the Hours fields if the elapsed time must be less than a day. The values you set on this form are used, along with the date of the incident, to calculate default followup, late, and warning dates in the **Incidents** form when you specify a priority for an incident. You can manually override them, but if you later change the incident's priority, the default values for the new priority code override your manually entered values.

- Days/Hours Until Followup

  Specify the number of days, or number of hours, in which you must follow up when an incident is flagged at this priority level.

- Days/Hours Until Late

Specify the number of days, or number of hours, until an incident is flagged late at this priority level. Late incidents are shown in the Alert column on the **Incident Queue Console**.

- Days/Hours Until Warning

  Specify the number of days, or number of hours, from the time the incident entry until a warning is issued for the incident. This warning indicates that the incident is nearing a late status. Warnings are shown in the Alert column on the **Incident Queue Console**.

Coverage Basis

Specify the hours to consider as part of the "Days/hours until..." value when the system sets warning, due, and follow-up dates for incidents:

- **All Hours:** All 24 hours of all days are included as coverage time.
- **Business Hours:** Only the time ranges for each day of the week as defined on the **Service Parameters** form are included as coverage time.
- **Contract Coverage Hours:** Only the time ranges specified on a valid customer contract are included as coverage time. If this option is selected but no contract is found for the customer or unit, then Business Hours is used.

Note: The **Service Holidays** option on the **Service Parameters** form determines whether holidays entered in the back office application are included or excluded from the priority date calculation for Business Hours and Contract Coverage Hours. All Hours means all, regardless of holidays.

2 Save the record.

Escalation Tasks

Click **Escalation Tasks** to open the **Escalation Tasks** form, where you can set up escalation activities for each priority code. After you set up the tasks there, they are displayed in the grid on the **Service Priority Codes** form.

Setting up Escalation Tasks

For each priority code that you define, set up a set of escalation tasks to be used when an incident is assigned a priority code.

Specify this information on the **Escalation Tasks** form:

1 In the header area, specify this information:

Priority Code

Select the priority code for which you are setting up the escalation task.

Sequence

Description

Specify a description of the Escalation Task that you want to display in the Escalation Log.

Basis

Frequency

Select the frequency for the escalation task. For recurring tasks, specify the duration between notifications and the measure in which it is evaluated.

2 If you specify information in the **Email** tab, and if the Application Event Service is configured on your system, the Escalation Utility will send escalation notifications to your e-mail server. Specify this information about the message and its recipients:

Send Email Notification

Select this check box to have an email sent when the incident escalation rule are met.

Recipient(s)

Select the check box for each partner to be notified when the incident escalation rules has been met. The email address assigned on the **Partners** form is used (if related to a partner). The primary email address on the **Users** form is used for the Salesperson.

Subject

Specify a brief summary of the email.

Body

The main text of the email.

NOTE: SQL-based substitutions for sending dynamic data (#table.field#) into an e-mail message is supported. A few aliases are also supported (#table_alias.field#) to distinguish foreign keys to the same records; owner and ssr (fs_partner references). In the example below, the "Subject" uses SQL substitutions and "Body" uses a predefined alias call.
EXAMPLE:
Subject: This notification is in regard to Incident: #fs_incident.inc_num#, #fs_incident.description#
Body: Partner #owner.name# has not performed the follow-up for #customer.name#.

3 In the **Text/Pager** tab, select whether you want to send a text message or pager message, then specify this information:

Recipient(s)

Select the check box for each partner to be notified when the incident escalation rules has been met.

Text Content

Specify the information to be sent in the text message.

4 In the **Other** tab, specify this information:

Change Owner

Select this check box to have the owner of the incident be changed to the specified partner for an escalated incident.

Change Status Code

Select this check box to have the incident status changed to the selected status code for an escalated incident.

Create Event

Select this check box to create an event with the chosen event code for the incident when the escalation rule is met.

Change Priority Code

Select this check box to have the incident priority code changed to the chosen code for an escalated incident.

5 In the **Additional Rules** tab, each of the rules fields let you include or exclude specific codes. Escalation tasks are assigned to each incident based on the priority code; however, not all tasks will be activated. If the criteria specified here is not met, then the escalation tasks are set to inactive on the Incidents form. Specify this information:

Department

Select the department out of which the partner works.

Owner

Select the partner identification responsible for the Incident, Event, SRO, etc.

Status Code

Specify a user-defined name to signify the service status code.

SSR

SSR is an abbreviation for Service Support Representative. The SSR is the call center or support person that logs the incident. The default value is based on the user id of the person logged on to the system.

Item

The item number is displayed.

Incident

The incident number is displayed.

Notes about this tab:

- If more than one code is required, build a comma-separated list.
- This solution supports wildcard string replacement with the use of the asterisk character (*).
- All rules fields must evaluate to true in order for the escalation tasks to be active on the incident where the rule applies.

These examples show how to use the rules fields:

- If the escalation task should only be active for the Service and Billing departments, the **Department** field contains this value:
  Service, Billing

- If the escalation task should only be active for incidents prefixed with 'Wrk' or 'Rewrk', the Incident field contains this value:
  Wrk*, Rewrk*
- If the escalation task should only be active for items suffixed with '2006' or '2007', the Item field contains this value:
  *2006, *2007

Setting Up Service Parameters (Infor CloudSuite)

In the **Service Parameters** form, specify system parameter information:

1 In the **Call Center** tab, specify this information:

Incident Prefix

Specify a default prefix to use for all new incident numbers. The system uses this value, along with the standard expand key logic, to automatically generate the next available incident number.

Status Code

Specify the default value to use as the status of any new incident.

Priority Code

Specify the default priority code to use for any new incident.

To Be Scheduled

Select this check box to indicate that the current incident or SRO is to be included in the scheduling process for partner assignment. If selected, the incident or SRO is displayed on the **Service Schedules** form when you do select a task and click **All To Be Scheduled**. If cleared, the incident or SRO can still be manually scheduled but is not automatically displayed on the **Service Schedules** form.

Use the **Incident/SRO Sync Settings** fields on this tab indicate how fields should be synchronized for SROs and Incidents that are cross-referenced. For more information, see Using an Incident to Create a Service Order.

2 In the **Service Order (1)** tab, specify this information:

SRO Prefix

Specify a default prefix to use for all new service order numbers. The system uses this value, along with the standard expand key logic, to automatically generate the next available SRO number.

SRO Type

Specify the default type to use for new service orders. The types are defined on the **Service Order Types** form.

SRO Product Code

Specify the default product code to use for new service orders. The product code encompasses all of the general ledger accounts that are used for posting material, labor, and miscellaneous

expenses to a SRO. The product code also includes the accounts that are used by SRO invoicing to post Cost of Goods Sold and revenue amounts. Product codes are defined on the **Product Codes** form.

Default Operation Status

Specify whether new operations have a default status of Open, Invoice, or Closed.

Billing Type

Specify the default value to use for the billing type, which is used to determine the total price for a service request order:

- Calculated/Time and Material: Price is calculated as the sum of all material, labor, and miscellaneous items issued.
- Project/Fixed: Price is based on the manually entered fixed amount.

Billing Code

Specify the default billing code to use on service orders. This code determines the amount to billed for SRO material and labor transactions. For more information, see Billing Code.

Warehouse

Specify the default warehouse to use for service orders. Warehouses are set up and maintained through the **Warehouses** form.

Default SRO Template

Select an available Service Order Template if you want to use one by default when users create new service orders.

Loaner Warehouse and **Loaner Location**

Specify the default warehouse and location to use for the material and line material transaction types Loaner Shipment and Loaner Return.

Material Transaction Type

Specify a value to use as the default when you add planned or actual material transactions through the **Service Order Transactions** form.

Pay SRO Commissions

Specify when commissions are to be paid for service orders:

- None: Commission calculations are not performed for service orders.
- Invoice: Commission due records are created, and the salesperson can be reimbursed during SRO invoicing.
- Payment: Commission due records are created during SRO invoicing, but the salesperson is not reimbursed until payment is received from the customer for the invoiced amount.

Partial Billing

Select this check box if you want the SRO Invoice Print/Post program to bill an SRO or SRO transaction with a status of bill hold. If the check box is selected at the header level, the system

ignores the entire SRO. If the check box is selected at the transaction level, only the transaction is ignored and all other transactions not on hold are invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Accumulate WIP

Specify a default value to use for this field on new service orders. If this field is selected, costs issued to the SRO are stored in WIP accounts. Otherwise, costs are posted directly to cost of goods (COGS) accounts.

Planned Transaction Required

Specify a default value to use for this field on new service orders. If this field is selected, then a planned transaction must exist before the line or operation can be invoiced.

Use Planned Pricing

Specify a default value to use for this field on new service orders. If this field is selected, the SRO uses planned pricing. Otherwise pricing is based on partner, codes, and customer.

Use End User Types

Select this check box if you want to use end user types for service orders.

If selected, a new field is displayed on the **Customer** tab of the **Service Orders** form to hold the end user type. The default value for this field is from the end user type specified on the **Codes** tab of the **Customers** form. This value can be changed for each individual service order. As material, labor, and miscellaneous transactions are posted against the service order, the system uses the end user type, if it is not blank, to acquire the sales and cost of goods sold account numbers.

DC Auto Post Labor

Select this field if transactions entered through the **SRO Labor Data Collection** form are added to the service order as posted actual transactions. Otherwise, they are added as unposted actual transactions.

DC Auto Post Material

Select this field if transactions entered through the **SRO Material Data Collection** form are added to the service order as posted actual transactions. Otherwise, they are added as unposted actual transactions.

Include SROs In On Order Balance

Select this field to include all SRO activity when the On Order Balance of a customer is calculated. The On Order Balance field is displayed on the **Customers** form.

Update Plan During Post

Select this field to update planned transactions to the actual transactions posted. If the quantity posted is less than the original planned quantity, a back order planned transaction is created. Clear this field to preserve the planned transaction in its original state and simply mark it as posted. This parameter only affects planned material transactions.

Auto Close SRO After Invoicing

Use this field to set the default value for the Auto Close SRO After Invoicing field on the Service Orders form. (If the service order is created from a template, then this field value defaults from the template instead of the Service Parameters form.) Select this field if SRO status is to be set to **Closed** when invoicing is complete, regardless of the close date. If this field is cleared, the Close Date field on the SRO must be manually set in order to close the SRO after invoicing.

3 In the **Service Order (2)** tab, specify this information:

Invoice Text

Specify the default text that displays at the bottom of every SRO invoice.

Account Location information:

In this area, set the default values to use for these fields on new service orders. For each field, specify whether the accounts used are assigned at the operation or transaction level.

Automatic Scheduling information:

Select **Auto Schedule Resource** to enable Automatic Resource Scheduling if you want schedule appointments to automatically be created for an SRO during cross-referencing from an incident or during Auto SRO generation. If this field is selected, define these scheduling defaults:

- Method: Specify the scheduling method to assign to new appointments.
- Appointment Status: Specify the appointment status assigned to new appointments.
- Hours: Specify the default hours to set on the new appointment if the amount cannot be determined from other sources.

MRP information:

Use these fields to set default values on service orders, to specify the SRO information is included in MRP:

- Include SRO Demand
- Include SRO Allocations
- Consume Forecast

Parts Fulfillment information:

The setting of the **Mode** field determines whether the rest of the fields on this tab are enabled.

Mode

This field controls how the **Awaiting Parts** check box behaves throughout the Service module. These are the valid options:

- **Manual**: The Awaiting Parts field on Incident, SRO, SRO Line, and SRO Operation is enabled. This allows the user to select and clear the field at each level to signify the service order is awaiting receipt of parts.
- **Automatic**: The Awaiting Parts field on Incident, SRO, SRO Line, and SRO Operation is disabled. The system selects and clears the field based on whether or not there is an associated planned SRO material transaction associated to an outstanding purchase order or not. This option also enables the Awaiting Parts and Parts Received Actions functionality.

Awaiting Parts Actions:

- Change Working Status To
- Change Priority Code To
- Update To Be Scheduled Flag

Parts Received Actions:

- Change Working Status
- Change Priority Code To
- Update To Be Scheduled Flag
- Email SRO Lead Partner
- Email Incident Owner
- Email Content

4 In the **Partner** tab, specify this information:

Partner Prefix

Specify a default prefix to use for all new partner ID numbers. The system uses this value, along with the standard expand key logic, to automatically generate the next available partner number.

Auto Approve Reimbursement

Select this field if all reimbursable material, labor, and miscellaneous transactions should created as "approved." This lets you skip the **Expense Approval** form.

Default Labor Rate and **Default Labor Cost**

Specify values that are used to calculate the default rate and cost for an SRO labor transaction. If a rate or cost is not determined from the SRO, customer or partner/work code combination, these fields determine whether the rate and cost are defaulted from the partner or from the work code.

Partner Reimbursement Accounts

Specify the Voucher, Credit, and Other accounts where expenses for SRO material, labor and miscellaneous transactions are posted for any transaction that is reimbursed to the partner. The amount is held in these accounts until moved out by reimbursing the partner. The account that is used depends on the method by which the partner is set up to be reimbursed. These accounts are considered control accounts and are locked down accordingly.

5 In the **Other** tab, specify this information:

Use Separate Consumer

Select this option to maintain consumer records in the consumer database instead of the customer database. If you select this option, users cannot choose whether to bill incidents to customers or consumers; incidents are always billed to the customer.

Default Customer

Specify the customer number that is used as the default for new consumer records on the **Consumers** form.

Project Xref SRO Template

If you have defined templates on the **Service Order Templates** form, select a default template to use when users cross-reference a service order to a project.

Use Project Costcode

When a service order is cross-referenced to a project, this option determines how the cost code is used when transactions are posted to the service order and then transferred into the project. If the check box is cleared, use the cost code from the applicable product, labor, or miscellaneous code. If the check box is selected, use the cost code from the project material resource. In other words, specify whether all the service order costs are to be consolidated on the cost code, or broken out by the items, labor and miscellaneous codes.

Installation Information

These fields display the date and time that the currently running code was generated (that is, a Build date). Click **Profiler/Trace Utility** to find additional information. This utility is used by support to record database activity during a process that is being debugged.

Consumable Reason Code

Select a code defined on the **Miscellaneous Issues Reason Codes** form to use for the receipt of consumable items after warehouse transfers. Items can be marked as consumable on either the **Service Item/Warehouse Planning** form or the **Service Items** form.

Transit Loc

Specify a location, defined on the **Locations** form, to use for warehouse transfers that include service items.

Business Hours

Specify the starting and ending time for each day that the Service part of the company is open for business. This information can be used to set incident warning, due date, and follow-up dates. For more information, see Setting Up Priority Codes that Establish Response Times for Incidents.

Service On Holidays

Use this field to determine whether holidays are included or excluded from the priority date calculation for Business Hours and Contract Coverage Hours (that is, whether "All Hours" means all regardless of holidays). For more information, see Setting Up Priority Codes that Establish Response Times for Incidents.

6 In the **Amortization Control** tab, specify this information:

Total Periods

Specify the number of periods that the amortization amount is divided between. Each month end date designates the end of a period.

Journal

Select the accounting journal to use for the amortization. Journals are defined on the Journals form.

Select Trans Date From

Specify whether amortizations occur at the start or the end of the period.

Amortize Contracts

Select this field if contracts are included in the amortization process.

Amortization Accounts

Select the appropriate accounts to use for prepaid expenses and deferred revenue.

7 In the **Contract** tab, specify this information:

Contract Prefix

Specify a default prefix to use for all new contract numbers. The system uses this value, along with the standard expand key logic, to automatically generate the next available contract number.

Contract Product Code

Specify the default value to use for new contracts. The contract product code contains all of the general ledger accounts that are used to post the cost of goods sold and revenue amounts during the Contract Invoicing activity.

Open Status and **Close Status**

Select status codes, defined on the **Contract Status Codes** form, that will indicate that contracts are open or closed.

Price Basis

Specify the default value to use for new contracts. This basis is used in the calculation of charges when the contract line is invoiced.

Service Type

Specify the default service type value, from those defined on the **Service Types** form, to use for new contracts. This code describes the type of contract being sold to a customer.

Billing Type

Specify the default billing type value to use for new contracts. Options are:

- Fixed: The contract price is based on the manually entered total.
- Calculated: The contract price is based on the rates and time periods set up on the header and lines.

Billing Frequency

Specify the default value to use on new contracts or contract lines for the time period between billing cycles. For more information, see Contract Billing Frequency.

Pay Contract Commissions

Specify when commissions are to be paid for service contracts:

- None: Commissions are not calculated for service contracts.

- Invoice: Commission due records are created and the salesperson can be reimbursed at the time the contract is invoiced.
- Payment: Commission due records are created at time the contract is invoiced, but the salesperson is not reimbursed until payment has been received from the customer for the invoiced amount.

Billing Max Hrs/Day

Specify how many hours that a contract can be billed for one day. This is used for calculated contracts with lines that are billed by date.

Bill For Holidays

Select this check box to apply calculated contract rates on days that are marked in the system as a holiday.

Weekly Billing Times

Use these fields, in conjunction with the Billing Max Hrs/Day field, to define the time basis used to bill time-sensitive calculated contracts. For example, if the Monday open time is 8 a.m. and the close time is 6 p.m., and the Billing Max is set to 6, then the contract only incurs charges for 6 hours even though a 10 hour period is designated.

Prorate End of Billing

Set the default value to use on new calculated contracts. If this field is selected, the final time a contract is billed, the system calculates the amount to be invoiced based on the rate type and the amount of time remaining on the contract line.

Use End User Types

Select or clear this check box to specify whether to use end user types on new contracts.

Tax Waivers

Select this field if waiver charges billed against a contract or contract line are taxed.

Allow Customer Address Override

Select this field to allow users to specify a Ship To address that is different from the default customer and Ship To combination for the contract.

Contract Account

8 In the **Unit** tab, specify this information:

Auto Build Unit Configuration

If you select this field, the complete unit configuration is created as the serial-tracked item is shipped on a customer order. The Auto Build process uses the item's job bill of materials to build the unit's configuration. This may add time to the shipping process if the bill of materials is several levels deep. This field is used in conjunction with **Auto Create Unit on Shipment**.

Auto Create Unit On Shipment

If you select this field, the shipment of any serial-tracked item automatically creates a record on the **Units** form. This prepares the system to handle future maintenance and service calls on the unit.

Initial Configuration Display

Specify the number of levels the unit configuration expands by default.

Configuration Update Method

Specify how the system updates the unit configuration when an SRO Material Transaction is updated:

- Auto Synch: The system tries to add and remove configuration components without user intervention.
- Auto Append: The system tracks any additions or removals in a separate branch of the configuration tree.
- Prompt: Prompt users to determine whether they want to manually adjust the configuration.
- Never: The unit configuration is not affected by posted material transactions.

NOTE: For more information about this field and the following two fields, see Unit Configuration Automation Control.

Default Configuration Removal Reason

Specify a default reason that the system uses when a component is removed through the Auto Sync or Auto Append method. This value is also used as the default reason on the **Unit Configurations** form when the Remove Date is manually specified for a component.

Configuration Change History Branch

If your system uses the Auto Append method for unit configuration updates, the value you specify here is used to determine the name of the branch in the configuration that holds components that are added or removed when SRO material transactions are posted. We recommend that you change this value every year, to track components in a separate node each year.

9 In the **Portal** tab, specify this information:

Default SSR

Specify the service support representative (SSR) to be used by default for incident records that are submitted from the Customer or Reseller Portal.

Default Status Code

Specify the status code to be used by default for incident records that are submitted from the Customer or Reseller Portal.

Default Owner

Specify the owner to be used by default for incident records that are submitted from the Customer or Reseller Portal.

Allow Portal Users To Set Incident Priority

If you select this field, the Customer or Reseller Portal user can set the incident priority when entering the incident from the portal.

Setting Up Service Reasons and Activities

On the **Service Reasons** form, set up service reason codes that are used when an incident is created, to describe the reason for the incident or service call. You can define general reason categories, and then define specific reasons for each category. You can also define activities to perform, or questions to ask, that a customer support representative can use to try to resolve the incident without involving a service technician. The suggested activities are displayed to representatives after they select the reason code in the **Incidents** form and click the **General Reasons** or **Specific Reasons** button.

After you define a reason and its activities on the **Service Reasons** form, click the **Activities** button to view the activities information as the representative will see it.

Example

This example shows how you could define a General Reason (Maintenance), some Specific Reasons related to that general reason, and some activities to suggest:

General Reason: Maint

Description: Bicycle Maintenance Service

Specific Reason: Brakes

- **Description:** Brake Check
- **Reason Activities:** Does the brake squeal? Does the brake squeeze equally on both sides of the tire?

Specific Reason: Chain

- **Description:** Chain Check
- **Reason Activities**: Is the chain oiled properly? Is a link broken?

You can also specify a default **Duration**, in hours or minutes, that you expect the resolution of each incident reason to take.

Setting Up Incident Event Codes

On the **Incident Event Codes** form, specify codes to use for events that can occur when someone is trying to resolve an incident:

Event Code

Specify a code for the event, for example, Callback, Dispatch, or E-mail.

Type

Specify the category that the event is grouped under:

- Call: A communication was received from or sent to a contact.
- Dispatch: A partner is working on the issue.
- SRO: The event is associated with an existing service request order.

Description

Specify a description for the event.

Event Activities

Specify any activities associated with this event. For example, you could include a list of reminders such as "Get the customer's contact name and phone number."

Setting Up Service Resolutions

On the **Service Resolutions** form, set up codes that are used when an incident is closed, to describe how the incident was resolved. You can define general resolution categories, and then define specific resolutions for each category. The service representatives select the resolution in the **Incidents** form.

Example

This example shows how you could define sever general resolutions, and some specific resolutions related to one of the general resolutions:

General Resolution: Closed

Description: Successful resolution

General Resolution: Delayed

Description: Closed because of a delay

Specific Resolution: Customer

Specific Resolution: Supplier

Specific Resolution: Internal

Setting Up Partners

A partner is a resource (employee, customer, or vendor) who can resolve incidents or SROs. Partners can be specified as the SSR and/or as the "owner" of an incident. Partner IDs can be linked to employee IDs, customer IDs, vendor IDs, and/or user IDs.

Use the **Partners** form to specify information about your company's partners:

1 In the header area of the **Partners** form, specify this information:

Partner

Specify an abbreviated version of the name of the partner.

Type

Select the category that a partner belongs to:

- Employee

- Customer
- Vendor

Ref Num

Select the partner reference number. This is the associated customer, employee, or vendor.

Ship To

Select the ship to location to associate with the partner. This field is enabled only for partners with the type Customer.

Name

Specify the name of the partner.

Active

Select this check box if the partner is currently active.

Supervisor

Select the supervisor of the partner.

Schedule Button

Click this button to launch the Service Scheduler.

2 On the **General** tab, specify this information:

Email

Specify the email address.

Warehouse

Select the warehouse that a partner may issue inventory out of while working on a SRO.

Labor Cost

Specify the hourly cost for a partner.

Hourly Rate

Specify the hourly rate of a partner for the type of work being performed.

Default Misc Code

Select the unique alphanumeric code that represents a particular type of expense that is charged to a SRO. These codes can be used to ensure that the expenses are charged to the proper general ledger account. These codes are set up on the **Miscellaneous Codes** form.

Default Work Code

Select the code used to represent the type of work that is being recorded to a SRO. Codes are set up and maintained on the **Work Codes** form.

Default Payment Type

Specify the payment type to be used by default for miscellaneous SRO transactions that are submitted from the Reseller Portal. Available selections are set up and maintained on the **Payment Types** form.

Department

Select the department out of which the partner works.

User

Select a User ID from the list. The list is populated from the **Users** form.

Reimbursement Method

Select the method to be used or the type of payment to be included for partner reimbursements. Valid options are voucher, credit memo, other, and all.

Reimburse Material

Select this check box to reimburse the partner for material transactions on incidents that the partner is assigned to. If this field is not selected, costing is not affected for associated transactions.

Reimburse Labor

Select this check box to reimburse the partner for labor transactions on incidents that the partner is assigned to. If this field is cleared, costing for the associated transactions is not affected.

Currency

Select a default currency code to associate with the partner. This will be used for reimbursement currency conversion.

3 On the **Scheduling** tab, specify the availability and location of this partner:

Weekly Available Hours

Specify the maximum block of time that a partner is to be scheduled for a task or tasks on any given day.

Display On Schedule Board

Select this check box to display the partner on the board within the Service Scheduling module.

Exchange Integration Enabled

This check box is selected if the Exchange Integration service is enabled for the user.

Exchange Folder

Optionally, specify a destination folder for the Exchange Integration service. In most cases, this field can be left blank and the appointments will be synchronized with the user's default Inbox Calendar based on the email address setup in Exchange.

In the Last Known Location section of this tab:

- Click History to launch the Partner Location History form.
- Click Map Current to send the current partner location to MapPoint.
- Click Map All to send all partner last-known locations to MapPoint.

- Last Timestamp displays the date and time that the last GPS coordinates were collected.
- Latitude and Longitude display the values from the last time a coordinate was collected.

4 On the **Certifications** tab, select any certifications acquired by the partner. (Certification codes are defined on the **Certifications/Licenses** form.) These certifications are matched with any required certifications for a certain item (in the **Items** form) to determine if a partner has the necessary qualifications to work on a SRO or on an incident involving a particular item. The description of the certification displays after you select the code.

5 On the **Skills** tab,select any skills acquired by the partner. (Skill codes are defined on the **Skills** form.) These skills are matched with any required skills for a certain item (in the **Items** form) to determine if a partner has the necessary qualifications to work on a SRO or on an incident involving a particular item. The description of the skill displays after you select the code.:

6 On the **Areas** tab, specify where this partner can be used:

Region

Select the region code for the partner.

Description

The description of the region is displayed.

Country

State

County

City

Postal Code

7 On the **Team** tab, set up partners as teams. Service scheduling uses this information to dispatch partners as a group. The system creates individual appointments for each team member as new appointments are created and assigned to the team. Specify this information:

Partner

For partner records that are set up as a team, select the partners that make up the team.

NOTE: Partners can be members of more than one team.

Name

The partner name is displayed.

Team

Select any team(s) to which the partner belongs.

NOTE: A team record is set up in the same way as a partner record using the **Partners** form.

Name

The partner name is displayed.

Team Substitutions Button

Click this button to launch the **Partner Substitutions** form, filtered for the selected partner/team record and the current system date.

Refresh Skills Button

Click this button to delete all the skills currently associated with a team and rebuild the list by adding skills currently held by any partner on the team. The new skill set is stored on the **Skills** tab of the team record.

Refresh Certifications Button

Click this button to launch the **SRO Quote** form, linked for the current SRO.

Click the **Schedules** button to display the **Service Schedules** form, where you can see scheduled appointments related to service work.

Setting Up Knowledge Base Categories

On the **Knowledge Base Categories** form, set up general categories that can be used to search the knowledge base. You can more specific subcategories within the general categories.

For example, you could define these general and specific categories:

General Category: Internal

Specific Category: Sales

Specific Category: Technical

General Category: Bike Parts

Specific Category: Seats

Specific Category: Handlebars

Using the Knowledge Base

Viewing Knowledge Base Entries

Viewing Knowledge Base Entries from Incidents

If a knowledge base ID is already included in a incident, click the **View** button to view it on the **Knowledge Base** form.

When you are viewing an entry, you can click **Copy** to copy the current record information to your system's clipboard for pasting to another application.

The top of the screen indicates when and who created the entry, and when and who updated it last.

Searching for Knowledge Base Entries

To search for a knowledge base entry from the **Incidents** or **Incident Queue Console** forms, click **Knowledge Base Search.** This displays the **Knowledge Base Query** form, where you can search and filter for specific information in the **Knowledge Base**.

You can also use the **Knowledge Base Keyword Search** form to find specific knowledge base information by specifying key words:

1. In the Search field, select Any of these words, All of these words, or Exact phrase.
2. To further refine the search, select which areas of the knowledge base to include: Keywords, Summary, Description, and Resolution.
3. In the Category fields, select a general and then a more specific category, if appropriate.
4. Refine the search by specifying the user who created or updated the entry, if you know that information.
5. Type the text to search for, and click Search.
6. Any matching entries display in the grid. Select an entry and click View to see the full entry displayed in the Knowledge Base form.

Setting Up Knowledge Base Categories

On the **Knowledge Base Categories** form, set up general categories that can be used to search the knowledge base. You can more specific subcategories within the general categories.

For example, you could define these general and specific categories:

General Category: Internal

Specific Category: Sales

Specific Category: Technical

General Category: Bike Parts

Specific Category: Seats

Specific Category: Handlebars

Adding and Updating Knowledge Base Entries

You can build up a knowledge base of information to use to answer future questions. You can add entries, and then categorize them so it is easier to find similar entries. You can add entries dynamically while you are updating an incident, and you can query for a specific entry.

Creating KB Categories

If you know what types of knowledge base entries you will have, you can create categories. See Setting Up Knowledge Base Categories. You can also create additional categories after you have some existing entries, and then move the entries into the categories in the **Knowledge Base** form.

Creating KB Entries from Incidents

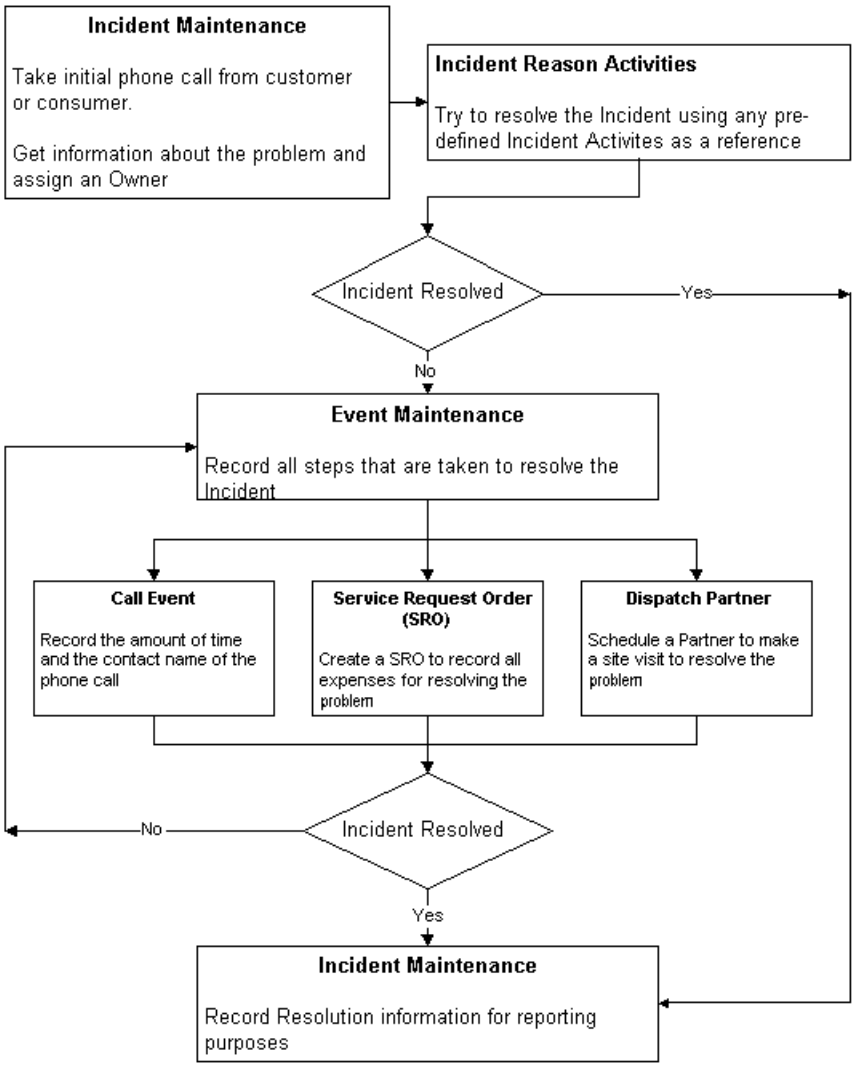
When you are updating an incident, you might determine that some information from the incident would be useful to other service employees in resolving similar incidents, or you might want to store some information about a particular company, vendor, or item for future reference. You can create a new entry directly from the Incidents form (Create button on the Status tab).

Creating KB Entries from the Knowledge Base form

1. Specify this information when you create a knowledge base entry:
2. Specify the Status: **Pending**, **Published**, or **Retired**.
3. Indicate whether this entry will be available to customers and/or partners through Service Management Web.
4. Specify the knowledge base category in which the entry belongs, if appropriate.
5. Specify keywords that can be used to easily locate the record through searching. These keywords will be used with the **Knowledge Base Keyword Search** form.
6. Provide a brief summary and a detailed description of the entry.
7. If this entry describes a problem, describe how to resolve the problem.

Using the Call Center to Add and Track Incidents

This process flow describes the general steps used in adding an incident and then tracking it through the system:



Recording the Initial Support Request

Your support representative (sometimes referred to as an SSR) receives initial requests for service via phone call, fax, e-mail, etc. These requests are recorded in the **Incidents** form. The SSR first determines whether the customer is calling about an existing incident, or whether a new incident must be created. If a new incident must be created, the SSR records the information that is needed to resolve the issue on the Incidents form:

- Customer information: Name, address, phone, fax, e-mail and any other contact information.
- Unit information: The serial number and item of the part that needs to be serviced. When a unit is identified, its warranty and contract information is added to the incident.

- Reason codes: General and specific codes that identify the problem and assist in routing the incident to the appropriate resources.
- Owner: the technician who is assigned to perform the service. Technicians are usually assigned based on the type of unit, type of service, or region.
- Incident priority/status: Record the severity of the incident, along with the status. Priority codes can be used to establish expected response times for "Follow up," "Warning," or "Late" incidents. When priority codes are used with the escalation feature, the system can alert you to potential issues.
- SRO cross-reference: If an incident requires service that must be billed, you can cross-reference the incident to an SRO, using the Destination Type.

If the call is about an existing incident, the SSR adds a new *event* on the **Incidents** form to record the customer's inquiry about the incident. Any activity related to the incident can be captured as an event. Events are user-definable, typically with names such as CallIn, CallOut, EmailIn, EmailOut, Dispatch, Notes, etc.

When an incident is resolved, specify the resolution, both general and specific, for future reference.

Reports and Historical Information

These reports are available related to incidents:

- Incident Report
- Incident Time Analysis Report

Adding an Initial Request for Service (Incident)

A Service Support Representative (SSR) can receive a request for service as a phone call, fax, or e-mail. The request is entered on the **Incidents** form. The incident is the starting point for all service calls.

First, you must determine if the customer is calling about an existing incident, or if a new incident must be created. If a new incident is created, record all of the information needed to resolve the issue into the **Incidents** form:

- Customer information: name, address, phone, fax, e-mail, and any other relevant contact information, in case additional information is needed later.
- Unit information: the serial number and item number of the part that needs to be serviced.
- Reason codes: Codes that identify the reason for the incident. These codes are broken down into specific codes to help you route the incident to the proper resources.
- Incident priority and status codes: Codes that record the severity of the incident and its current status.

Alternatively, you can quickly add an incident through **Insert Incident Information**.

To add an incident, specify this information on the **Incidents** form:

1 Specify this information in the header area:

Incident

The unique alphanumeric identification of an Incident is displayed. If this field is left blank when entering a new incident, the system automatically generates the next available number. A default prefix can also be added to the incident number by assigning a value to the Incident Prefix field on the Call Center tab of the Service Parameters form.

Date

Select the date and time that the incident was logged. The date and time when a new incident is started is the default value.

Description

Specify a brief summary of the reason why an incident is being created.

SSR

SSR is an abbreviation for Service Support Representative. The SSR is the call center or support person that logs the incident. The default value is based on the user id of the person logged on to the system.

SSR Site

In a multi-site environment, this indicates the location at which the SSR is opening the incident.

Owner

Select the partner identification responsible for the Incident, Event, SRO, etc.

Owner Site

Select the location of the owner in a multi-site environment.

Awaiting Parts

Select this check box is the Incident or SRO is dependent on material that is yet to be received. Whether this field is enabled or disabled to the user is controlled by the Parts Fulfillment mode assigned at the Service Parameters level.

Callback

Select this field to indicate that this is not the first incident logged in an attempt to resolve the customer issue. Use the **Prior Incident** field to link the new incident to its predecessor. The Callback field is set automatically when an incident is created with the **Generate Callback** button.

Warranty Claim

Select this check box if you want to indicate that the incident is a warranty claim and requires authorization.

2 Specify information about the customer in the **Address** tab:

- Customer number and ship to address and, optionally, the consumer number and ship-to address. If the ship-to address is blank, the zero ship-to address is used. Specify the consumer if the end user of the equipment is not the same as the customer.
- Contact information: phone and fax numbers and e-mail address.

3 Specify this information in the **Unit** tab:

NOTE: The unit is the item or material that needs to be serviced. Specifying a unit and/or item on an incident is not required, if the information is not known at the time of the call.

Unit

A unit is a complete material composition, including all subcomponents, replacement parts, and/or add-ons. Each unit is identified with a unique alphanumeric ID. This ID can be the serial number of the unit, but it does not have to be the serial number. If it is a serial number, that number does not have to exist in the **Serial Numbers** form. This allows you to service units that you did not manufacture.

Item

The item number is displayed.

Customer Item

Select the customer item. These are maintained on the **Customer Item Cross References** form.

Quantity

Specify the number or amount of units/items to be used on transaction, order, and so on.

U/M

Select the abbreviation for the unit of measure used to quantify the number of units or items.

Meter Date

Specify the date that the meter amount was recorded.

Meter Amount

Specify the amount of miles, impressions, clicks, and so on that have been recorded for a specific unit. This value may be used to determine if a unit is currently under warranty. A record is automatically appended to the **Meter History** tab of the **Units** form.

View Unit

Click this button to launch the **Units** form to display the details of the selected unit.

Find Unit Button

Click this button to launch the **Unit Configuration Search** form.

View Configuration

Click this button to launch the **Unit Configurations** form to display details of the unit selected.

4 Specify this information in the **Status** tab:

Prior Incident

Select a past incident to associate with the current incident. Click **View** to show the prior incident.

View

Click this button to launch the **Incidents** form filtered for the current record.

To Be Scheduled

Select this check box to indicate that the current incident or SRO is to be included in the scheduling process for partner assignment. If selected, the incident or SRO is displayed on the **Service Schedules** form when you do select a task and click **All To Be Scheduled**. If cleared, the incident or SRO can still be manually scheduled but is not automatically displayed on the **Service Schedules** form.

Priority Code

The priority code for the incident is displayed. This value is set on the **Service Parameters** form.

Note: Be careful when you specify a priority code in a time zone other than the one where the incident will be serviced. The default followup, warning, and due dates/times might need to be adjusted manually.

Status Code

Select the status code, which denotes the current condition of the incident. The default value is set on the **Service Parameters** form.

When appropriate, click **History** to launch the Incident Status History form.

Close Date

The date and time that the incident was closed is displayed. The value is automatically stamped on the incident when the status is changed to closed and the change is saved.

Awaiting Parts

Select this check box is the Incident or SRO is dependent on material that is yet to be received. Whether this field is enabled or disabled to the user is controlled by the Parts Fulfillment mode assigned at the Service Parameters level.

Follow-up Date

Select the calendar date and time when follow-up should be performed on the incident. The Incident Date/Time value is used when a new incident is created by adding the Time Until Follow-up value of the priority code.

Follow-up Complete

Select this check box to signify follow-up action has been performed. The Incident Escalation does not run Escalation Tasks of follow up basis when this box is selected.

Warning Date

Select a date and time to indicate that the incident is nearing the due date.

Due Date

Select the calendar date and time when the incident is due.

Calculate Button

Click this button to update the **Duration** fields on the **Status** tab of the incident. The calculation is based on the values set for duration and unit on the **Service Reasons** form. When any service reasons are then associated with the incident on the **Reasons** tab, the calculation routine takes the values into account.

Duration

The sum of the total time remaining for work to be performed on the incident is displayed. The values are calculated using the duration and unit fields from the **Service Reasons** form for any reason codes assigned to the incident.

Estimated Time Remaining

Specify the estimated time remaining for work to be performed.

Region

Select a region for the incident. Regions are used to group incidents by territory so that partners can be assigned using service scheduling.

Remote ID

If the incident was created remotely, the ID is displayed.

Kbase ID

The unique identifier of the knowledge base record is displayed.

If a Kbase ID is specified, click **View**, or, if an ID is not specified, click **Create**, to launch the **Knowledge Base** form.

Destination Type

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank, the system creates a new record of the reference type specified when the cross-reference is performed.

Destination Button

Click this button to perform a cross reference. If the values for the three reference fields are blank, the system sets them. If the three fields have been populated, the system accesses the appropriate form based on the source/destination type selected.

NOTE: For Cross Site SRO functionality the "SSSFS Global Incidents" replication category must be configured.

Site

Select the location the user is referencing in a multi-site environment.

Schedule Button

Click this button to launch the Service Scheduler.

Dispatch Button

Click this button to launch the **Service Schedule Dispatch** form.

5 Specify this information in the **Notes** tab:

Subject

Specify a brief summary of the note record.

The subject grid shows all the existing note records for the incident. Clicking the left side of the grid area below any existing note adds the next sequence number and allows for entry of an additional note record defaulting with the information described above.

Notes

Specify any notes pertaining to the currently selected record.

Details Button

Click this button to launch the **Notes** form to create, delete, or edit note records.

6 Specify this information in the **Reasons** tab:

General Reason

Select the general code to represent why the incident is being logged. The general reason codes are maintained through the **Service Reasons** form.

Specific Reason

Select the specific code to represent why the incident is being logged. The specific reason codes are maintained on the **Service Reasons** form.

General Resolution

Select the general code to represent why the incident is being closed. The general resolution codes are maintained through the **Service Resolutions** form.

Specific Resolution

Select the specific code to represent why the incident is being closed. The specific resolution codes are maintained through the **Service Resolutions** form.

Reason Notes

Specify any additional explanations of service or incident reasons.

Resolution Notes

Specify any additional explanation for service resolutions.

General Activities

Click this button to launch the **Service Activities** modal form to show or record actions that have been or need to be taken to resolve the incident.

Specific Activities Button

Click this button to launch the **Service Activities** modal form to show or record actions that have been or need to be taken to resolve the incident or service order.

For more information about reasons, see Setting Up Service Reasons.

7 Specify this information in the **Events** tab:

Event Date

The date and time that the event was recorded is displayed.

Event Code

Select the type of event that occurred. These options are set up and maintained through the **Incident Event Codes** form.

Site

Select the location of the owner in a multi-site environment.

Sequence

The number of the incident event is displayed. The sequence is assigned based on the order in which the event is entered rather than on the event date.

Owner

Select the partner identification responsible for the Incident, Event, SRO, etc.

Partner

The partner number is displayed.

Accept Date

Select the date and time that a partner acknowledges an event dispatch request.

Dispatch Date

Specify the date and time that a partner schedule is updated with the event dispatch request.

Plan Arrival Date

Select the date and time that a partner has scheduled to perform an event request.

Start Call Time

Select the date and time that the incident event began. Click **Start** to refresh the value shown to the current system time.

End Call Time

The date and time that the incident event finished is displayed. Click **End** to refresh the value shown to the current system time.

Follow-up Date

Select the calendar date and time when follow-up should be performed on the incident. The Incident Date/Time value is used when a new incident is created by adding the Time Until Follow-up value of the priority code.

Contact

The name of the contact person.

Phone

Specify the primary phone number for the contact.

Destination/Reference Type

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank the system creates a new record of the destination type specified when the cross reference is performed.

Destination/X-Ref Button

Click this button to perform a cross reference. If the values for the three reference fields are blank, the system sets them. If the three fields have been populated, the system accesses the appropriate form based on the source/destination type selected.

NOTE: For Cross Site SRO functionality the "SSSFS Global Incidents" replication category must be configured.

Site

Select the location the user is referencing in a multi-site environment.

Activities Button

Click this button to launch the modal **Service Activities** form for recording information related to the specific incident event.

8 In the **Escalation** tab, the grid displays all escalation tasks that qualify for this incident. The **Active** column indicates whether the escalation task is configured to fire for this incident. See Setting Up Escalation Tasks.

Other Ways to Use the Incidents Form

Use these buttons on the form as described here:

- Click **Escalation Tasks** (either in the main form or in the Escalation tab) to open the **Escalation Tasks** form where you can define additional tasks.
- Click **Escalation Log** (either in the main form or in the Escalation tab) to view the log of all escalations for this incident.
- Click **Service Orders** to create an SRO based on this incident.
- Click **Reason/Resolution Search** to search for the resolution to similar incidents, or to find existing incidents for this customer or type of unit.
- Click **Knowledge Base Search** to search the knowledge base for information regarding this incident, unit or customer.
- Click **Signatures** to display any captured electronic signatures related to the incident.
- Click **Schedule** to schedule an appointment with a partner.
- Click **Dispatch** to launch the **Service Schedule Dispatch** form with the Reference values populated from the incident.

Quick Incident Creation

You can quickly specify a simple list of information to create an incident on the **Incident Quick Create** form:

1. Specify the incident **Owner**, which is the partner responsible for resolving the incident. The **SSR** defaults to the partner ID of the user who is logging the incident. If this is a multi-site environment, specify the site (location) of the SSR and Owner.
2. Specify a **Priority Code** for the incident. For more information, see Setting Up Priority Codes that Establish Response Times for Incidents.
3. Specify a **Status Code** or use the default value from the **Service Parameters** form.
4. Specify the **Customer ID**, **Name**, and **Ship To** address. It the customer exists, you can select this information from the drop-down menu.
5. Optionally, specify the **Unit** and/or **Item** the incident relates to.
6. Specify the name, e-mail address, and phone number of the **Contact**. If the contact exists, you can select this information from the drop-down menu.
7. Specify a **General Reason** and **Specific Reason**, to classify the incident. These reasons are defined on the **Service Reasons** form.
8. Specify any Notes about the incident.
9. Click **OK** to save your changes, or **Cancel** to exit the form without saving. If you need to immediately add more information about the incident, click **OK And Open Inc Form**.

Later, you can update and maintain the incident on the **Incidents** form.

Tracking and Updating Incidents with the Incident Queue Console

Use the fields and buttons on the **Incident Queue Console** to track and maintain incidents after they are created. The console collects all of the incident information and links on a single form.

1. Use the **top left pane** to get a quick view of the overall incident picture:

   Incidents

   Late

   The number of late incidents in the grid is displayed. Lateness is determined based on the date of entry and the priority code assigned to the incident.

   Unassigned

   This read-only field shows the number of incidents that do not have a partner assigned in the **Owner** field.

2. Use the **top right pane** to filter the console so that it displays only the incident information you want, and then click **Refresh:**

   Dept

Select the department out of which the partner works.

Partner

Select the partner.

Late Only

Select this check box to limit the grid display to show only late incidents. Lateness is determined based on the date of entry and the priority code assigned to the incident.

My Incidents Only

Select this check box to limit the grid display to show only records where the incident owner matches the partner ID of the current user.

Exclude Assigned

Select this check box to limit the grid display to show only records that have no partner assigned to the owner field of the incident.

As Of

Select a date to be used for record filtering.

Specific Incident

Filter based on an incident number.

You can also specify a department or partner and then click **Schedule** to display the appointment schedule for that department or partner.

3 Use the **Incidents grid** to view information from the **Incidents** form, filtered according to your specifications above. The fields in the grid are described in Adding an Initial Request for Service (Incident).

4 Select an incident from the grid in order to perform the actions below on the incident.

5 Use these buttons to quickly open these related forms, where you can perform actions:

- Click **Create Incident** to open the **Incidents** form and create a new incident.
- Click **Become Owner** to add yourself (using the partner associated with the user ID you are currently logged in under) as the owner of the selected incident. (User IDs are associated with partner IDs on the **Partners** form.) This button is activated when the Partner field in the header section of the form is populated.
- Click **Dispatch** to launch the **Service Schedule Dispatch** form with the reference values populated from the selected incident.
- Click **Enter Transaction** to launch the **Enter Transaction** form, where you can specify the SRO and the hours worked and billed for an incident.

6 Use these buttons in the **View** pane to quickly open these related forms, filtered to match the information in the selected row in the Incidents grid:

- Click **Unit** to launch the **Units** form to view details about a unit. This button is enabled when a unit is associated with the selected incident.

- Click **Customer** to launch the **Customers** form, filtered on the customer associated with the selected incident.
- Click **Incident** to launch the **Incidents** form, filtered on the selected incident.
- Click **SRO Transactions** to launch the SRO form filtered on the service order associated with the selected incident. This button is enabled when a service order is associated with the selected incident.
- Click **Source** to launch the **Service Orders** form filtered on the service order associated with the selected incident. This button is enabled when a service order is associated with the selected incident.

7 When an incident is selected in the grid, the panes at the bottom of the form display Notes, Reason/Resolution Notes, and Events related to the selected incident. You can add or modify this information here.

Using the Service Reason/Resolution Search Utility

Use the **Service Reason/Resolution Search** utility to locate specific incidents or SROs.

1 Select the type of search to perform:

- **Begins**: Results have the same beginning as the specified text
- **Contains**: Results contain the entirety of the specified text
- **Ends**: Results have the same ending as the specified text

2 Specify the text to use in the search.

3 Specify the maximum number of results to list.

4 Select the types of incident notes to include in the results:

- Reason Notes
- Resolution Notes
- Incident Desc
- Incident Notes

5 Select the types of SRO notes to include in the results:

- Reason Notes
- Resolution Notes
- SRO Desc
- SRO Notes
- Lines
- Line Notes
- Operations
- Operation Notes

6 Select a range of dates to use for the results.

7 Select the unit to use in the search.

8 Click **Search** to populate the search results based on the filters selected.

9 Click **View** to launch the **Incidents** or **Service Orders** form for the currently selected incident or SRO.

Adding Events to an Incident

Events record all the steps that you take to resolve an incident. Events, which are recorded on the Incidents form, include a clock on/clock off feature that you can use for performance monitoring. Adding events is an optional step in the incident process.

To add an event when there is an update to an incident:

1 In the **Incidents** form, go to the Events tab.

2 If the amount of time spent on this call is to be recorded, click **Start**. The time will be recorded until you click **End**.

3 Specify at least this information: event code, date, and owner.

4 Enter detailed information about this event under the Notes tab.

5 If a partner is to be dispatched, specify the partner, the date that the partner accepted the request, the dispatch date, and planned arrival date.

6 Specify the date on which someone will follow up with the customer.

7 Click **End** to end time recording.

For information about other fields on this tab, see Adding an Initial Request for Service (Incident).

Note: You can also add events to an incident through the Incident Queue Console.

Capturing FASMail E-mails as Incident Events

If you use FASMail to send e-mails, you can set up a template that automatically captures FASMail e-mails related to incidents as incident events.

To set this up, follow these steps:

1 Create a **FASMail Message Template** that is associated with the **Incidents** form.

2 Set the Event Code on the template to a code that indicates the event is an e-mail.

These codes are defined on the **Incident Event Codes** form, but they must be manually entered here. The code entered here must match an existing Event Code.

Then, when users open the **Incidents** form, display an incident, and click the tool bar button to create and send a FASMail e-mail related to the incident, an incident event is automatically logged, with the event code set to e-mail. The message content is attached to the event as a note.

About Incident Escalation

Use incident escalations to notify designated people, based on criteria you define, when an incident reaches its follow-up date, warning date, or late date. The follow-up, warning and late dates for an incident are determined by to the priority code that is assigned to each incident.

Automatic notification of incidents is handled through a "watchdog" utility that you can place on the background queue. This **Escalation Utility** monitors the system and automatically performs escalation actions.

Setup

Use these steps to set up incident escalation:

1 Define the weekly billing hours on the Contract tab of the **Service Parameters** form. These fields work in conjunction with the **Coverage** fields on the **Service Priority Codes** form.

2 Define a Supervisor on the **Partners** form. This field applies only if using the escalation task requires a supervisor.

3 Use the **Incident Escalation Tasks** form to set up escalation activities by priority code. (You define when, how, and to whom notifications will be sent. (The basis for the follow-up, late or warnings are defined on the **Service Priority Codes** form.) On the **Incident Escalation Tasks** form, you can set notification options such as these:

Option	Description
E-mail	Send an e-mail to the incident owner, supervisor, SSR, contact, etc.
Status Change	Change the incident status code value.
Priority Change	Change the incident priority code value.
Text Message	Send a message to a text message service.
Create Event	Create an event to record the escalation occurrence/
Owner Change	Change the incident owner value.

4 On the **Service Parameters** form, assign a default priority code to use for all incidents. On the **Service Customers**, **Units**, or **Service Contracts** forms, assign priority code default values to specific customers, units or contracts, as needed. (A priority level default can also be set for items and service types, to simplify the setting up of units and contracts.)

Built-in Escalation (How Default Priority Codes Are Determined)

When you create an incident, the priority code assigned to the incident defaults from the values set at other levels, using this hierarchy:

1. If the unit on the incident is populated, and that unit is under an active contract, use the contract priority code, if not blank.
2. If the item and customer on the incident are populated and that item/customer combination is under an active contract, use the contract priority code, if not blank.
3. If the customer on the incident is populated and that customer has an active contract, use the contract priority code, if not blank.
4. If the unit on the incident is populated but not found on an active contract, use the unit's priority code, if not blank.
5. If the item on the incident is populated but not found on an active contract, use the item's priority code.
6. If the customer on the incident is populated but not found on an active contract, use the customer's priority code,if not blank.
7. If no other level in this hierarchy has a priority code defined, use the default priority code from the **Service Parameters** form.

When you save the incident record, the Escalation Tasks tab on the **Incidents** form displays the escalation tasks that are automatically associated with the incident. Escalation tasks which have rules which do not match that of the incident are displayed but marked as inactive.

You can change the escalation tasks or add new tasks that are created specifically for this incident.

Running the Escalation Utility

Run the **Incident Escalation Utility**, which determines what escalations should be performed. The utility can be run at set intervals on the background queue.

The utility performs these functions:

- Reviews all active escalation tasks for each open incident.
- Compares the current date to the date of the escalation basis.
- Determines the escalation frequency.
- Performs the escalation action.
- Creates an escalation log entry.
- Sets the Last Processed Date for each affected incident.

How an incident is escalated is determined by the priority of the incident, but what triggers the escalation can be based on criteria you set for Due Date, Follow-up, Late or Warning time lines. In addition, you can determine how often the escalation notification can occur - for example, once, hourly, or daily.

Viewing the Incident Escalation Logs

The **Incident Escalation Logs** form keeps track of the escalation tasks that were processed for each incident.

Using an Incident to Create a Service Order

Use either of these methods to create a new service order that is linked to the currently selected incident:

- On the **Incidents** form, select an incident and click **Service Orders**.
- From the **Incident Queue Console**, select an incident and click **XRef to SRO**.

Synchronization of Fields

The incident and the SRO have several fields in common. You control which fields should stay in synchronization by selecting those fields in the **Service Parameters** form, in the Incident/SRO Sync Settings area. When you first select any of these fields on the **Service Parameters** form, you are prompted to specify in which direction the synchronization is initially performed; that is, should the incident value override the SRO value, or should the SRO value override the incident value? After the first synchronization, updates to either the incident or the SRO are automatically synchronized.

If selected, the incident **Status Code** synchronizes with the SRO **Working Status;** the incident **Owner** synchronizes with the SRO **Lead Partner;** and the incident **Reason/Resolution** synchronizes with the **Reason/Resolution** at the SRO Operation level.

Using an Incident to Create a Customer Order

You can create and cross-reference jobs, projects, customer orders, purchase orders, PO requisitions, and SROs from an incident or an incident event.

From an Incident

You can quickly create a sales order by using a cross-reference from an incident. The information that is provided for the Incident is used to populate the sales order header and line.

To do this:

1. Create and save an Incident. You must assign a customer.
2. On the Status tab, set the Destination to the type of document that you want to create or cross-reference to this incident.
3. Click **Destination**.

From an Incident Event

You can quickly create a sales order by using a cross-reference from an event. The information that is provided for the incident and event is used to populate the sales order header and line.

To do this:

1. Create and save an Incident. You must assign a customer.
2. On the Status tab, set the Destination to the type of document that you want to create or cross-reference to this incident.
3. Click **Destination**.

Example: Customer Orders

When you create a cross-reference to a customer order, the customer of the incident is assigned to the customer order header. If an item or unit is assigned on the incident, then an order line for that item or unit is created. The Taken By value is set to the SSR of the incident. The order entry date is set to the system date The order status, order type, and warehouse default as if the order were created manually The salesperson, price code, terms code, billing manager and other customer-specific values are defaulted appropriately.

Most of the other documents that you can cross-reference are similar. For information about SROs, see Using an Incident to Create a Service Order.

Completing an Incident and Reviewing Incident Status History

When an incident is completed, specify the appropriate status (Closed, Complete, or whatever status your company uses to indicate completion) in the Status Code field on the **Incidents** form. (When you define status codes on the **Service Status Codes** form, you determine which statuses indicate completion by selecting the Closed check box.) For an incident with a completed status, all fields except the Status Code field are disabled on the **Incidents** form.

You can review the history of all changes to this incident's status code, for example, to see if the incident was on hold at any point or if it was opened and closed more than one time. To do this, click **History** on the Status tab of the **Incidents** form. The **Incident Status History** form is displayed. Whenever the incident status code was changed, a snapshot of other information was stored: owner, date of the change, and user. If a change was made from Service Management Mobile and GPS is enabled, the GPS location and date are also saved, so you can plot the location where the status was changed on a Microsoft MapPoint map.

Contracts

Using Contracts to Track Maintenance Agreements for Customers

Scheduled Maintenance

You can create a pre-configured maintenance schedule for each item on the contract. This functionality facilitates the creation of service orders to trigger and track expenses for the recurring maintenance.

Amortizations

Using amortizations allows you to extend an expense over a predefined period of time. Use amortizations with contracts to prorate the cost of the unit or item associated with the contract. The amortization process debits the sales account from the distribution account associated with the contract, and credits the designated expense account. See Using Amortizations for more information.

Rentals

You can create a rental contract agreement for items to be rented. Launch the **Service Rental Contract Agreement** form from the **Service Contracts** form to set up the rental agreement. For more information, see Setting Up Rentals.

Setting Up the System for Contracts

Setting Up Contract Service Types

To set up a new contract service type:

1 Specify these header fields on the **Contract Service Types** form:

Service Type

Specify an alphanumeric code to represent the type of contract.

Description

Specify a brief description of the service type code.

Product Code

Select the default value to use for new contracts. The contract product code contains all of the general ledger accounts that are used to post the cost of goods sold and revenue amounts during the Contract Invoicing activity.

Terms

Optionally, select a terms code to use for the new contract. Leave this field blank to use the default customer term code.

The terms code is used to identify specific billing terms that apply to this customer. The terms code is used when determining the transaction due date and the discount information.

Default Item

Select an item to use as the default with the service type.

Waiver Charge

A percentage that determines service contract waiver charges is displayed. The amount is calculated based on the total rental amount for any contract lines that have the Include Waiver Charge check box selected. Any surcharges associated with the contract line are not included in this calculation.

Billing Frequency

Select the default value to use on new contracts or contract lines for the time period between billing cycles.

Billing Type

Select the default billing type value to use for new contracts:

- **Fixed**: The contract price is based on the manually entered total.
- **Calculated**: The contract price is based on the rates and time periods set up on the header and lines.

Prepayment Amount (%)

Specify a required prepayment amount for the service type.

Prorate End of Billing

This field is set by the default value on the **Contract Parameters** form.

Contract Rates button

Click this button to launch the **Contract Rates** form.

2 Specify these fields in the Service Level Agreement group box:

Priority Code

Select a priority code to use with the service type.

Override Business Hours

Select this check box to use a Start/End Business Hour Schedule that is different than the hours set up in the General Parameters. Selecting this check box enables the Start/End Time fields, where you can enter the times for contracts using this type.

Start/End Time

For each day, specify the range of time during which the items/units under contract are covered.

% Of Material Covered

Specify the percentage amount that a customer is charged for each material transaction. As service transactions are posted for the particular unit or item under contract, the system will automatically calculate the price of the transaction based on the percentage not covered. The entitlement calculation can also take into account different percentages based on the service order SRO Type, the Family Code of the item on the material transaction, or a combination of the two.

For example, if expenses are completely covered, then the % Of Coverage would be set to 100%. If only 10% of transaction is going to be charged, then the % Of Coverage would be set to 90%.

% Of Labor Covered

Specify the percentage amount that a customer is charged for each labor transaction. As service transactions are posted for the particular unit or item under contract, the system will automatically calculate the price of the transaction based on the percentage not covered. The entitlement calculation can also take into account different percentages based on the service order SRO Type, the Work Code of the labor transaction, or a combination of the two.

For example, if expenses are completely covered, then the % Of Coverage would be set to 100%. If only 10% of transaction is going to be charged, then the % Of Coverage would be set to 90%.

3 Save the record.

Setting Up Contract Status Codes

To set up a contract status code, specify these fields on the **Contract Status Codes** form:

Status

Specify a status code for the service contract.

Description

Specify a description of the status code.

Closed

Select this check box mark the status as closed.

After specifying the fields, click **Save**.

Using End User Types

On the Contract tab of the **Service Parameters** form, specify if you want to use end user types for contracts.

If you set this parameter for a contract, an End User Type field is displayed on the General tab of the **Service Contracts** form. The default value of this field comes from the End User Type specified on the Codes tab of the **Customers** form. You can change this value for each contract. When material, labor, and miscellaneous transactions are posted against the contract, the system uses the End User Type, if it is not blank, to find the Sales and Cost of Goods Sold account numbers.

Set up end user types on the **End User Types** form.

Setting Up Service Parameters (Infor CloudSuite)

See Setting Up Service Parameters (Infor CloudSuite) on page 8.

Adding and Maintaining Contracts

Adding a Contract

Follow these steps to create a new contract on the **Service Contracts** form:

1 On the **Service Contracts** form, turn off Filter-in-Place, and select **Actions > New**.

2 Specify these fields:

Contract

Specify an alphanumeric code for the contract. Optionally, leave the field blank so the system generates the next available number.

Service Type

Select a type of service, which represents the type of contract sold to a customer. The codes available are set up and maintained through the **Contract Service Types** form.

Customer

Select a customer for the contract.

Ship To

If you want to change the default location, select a ship to location.

(Contract) Status

The status is automatically set to Open. The available codes are set up and maintained using the **Contract Status Codes** form.

Salesperson

The salesperson associated with the SRO or contract is displayed. You can select a different salesperson.

Billing Frequency

The frequency of the billing cycle is displayed. You can select a different frequency.

Billing Type

The billing type is displayed. You can select the alternate billing type.

Customer PO

Specify the customer purchase order that relates to the contract or contract line.

Start/End Date

The **Start Date** is set to the current date. Select the ending date of the contract.

Billed Thru

Select the date through which the contract or contract line will be invoiced.

3 Optionally, specify these fields on the **General** tab:

Annual Fixed Contract Total

Specify the yearly price total for a fixed contract.

Waiver Charge

Specify a percentage for the contract waiver charge. This charge is added to each contract invoice.

Prorate End of Billing

Select this check box to automatically calculate the amount to be invoiced based on the rate type and the amount of time remaining on the contract line, for the final contract billing.

Renewal Date

Select the date by which the contract needs to be renewed. Recurring billing for all contract lines uses the specified date.

Last Payment Received

The date of the most recent payment receipt for the contract is displayed.

Last Processed

The date of the most recent payment processing for the contract is displayed.

Total Billed

The running total of invoiced charges for the service contract or contract line is displayed.

4 The **Customer** tab shows contact information for the customer.

5 The grid on the **Lines** tab shows information for each contract line.

6 The **Maintenance** tab shows maintenance information by schedule, items/units, and operations.

7 The information displayed on the **Coverage** tab is populated based on service level agreement information on the **Contract Service Types** form:

Priority Code

The priority level that should be given to incidents that are logged for customers and units associated with the contract is displayed.

Override Business Hours

This check box is selected if the contract has more specific business hours than the associated service type.

Start/End Time

For each day, the time during which the items/units under contract are covered is displayed. Optionally, specify different start and end times for the contract.

Time Zone

The time zone for the contract area of service is displayed.

8 Click **Save**.

Buttons

Use these buttons on the form as described:

- Click Contract Lines to launch the linked Service Contract Lines form.
- Click Service Order Lines to launch the linked Service Order Lines form.
- Click Contract Invoice Listing to launch the linked Service Contract Invoice Listing form.
- Click Checkout/Checkin to launch the POS Checkout/Checkin form.
- Click Agreement to launch the Service Contract Rental Agreement modal form.
- Click Contract Maintenance Schedules to launch the linked Service Contract Maintenance Schedules form.

Adding Contract Lines

For each item entered on a contract, a line is required. Follow these steps to add a contract line:

1 On the Service Contract Lines form, select Actions > New.

2 Specify this header information:

Contract

Select the contract for which you are adding lines.

Contract Status

The status of the service contract is displayed.

Service Type

The service type of the contract is displayed. The codes are set up and maintained through the **Service Types** form.

NOTE: A default value for new contracts can be set on the **Contract Parameters** tab of the **Service Parameters** form.

Line

The next available line number for this contract is automatically generated.

Unit

A unit is a complete material composition, including all subcomponents, replacement parts, and/or add-ons. Each unit is identified with a unique alphanumeric ID. This ID can be the serial number of the unit, but it does not have to be the serial number. If it is a serial number, that number does not have to exist in the **Service Serials** form. This allows you to service units that you did not manufacture.

Available

Click this button to launch the modal **Service Contract Item Availability** form to display how many of the item are in stock and the status of currently rented units.

Item

The item number is displayed.

Description

A brief description of the item is displayed.

Quantity

Specify the number or amount of units/items to be used on transaction, order, and so on.

U/M

Select the abbreviation for the unit of measure used to quantify the number of units or items.

Customer PO

Select the customer PO that relates to the contract line.

3 Specify this information on the **Ranges** tab:

Start Date

Select he calendar date when the contract or contract line starts.

Projected Due Date

Select an estimated date for when the contract line item will be returned.

Minimum Bill Thru

Select a date. The contract line will be billed through this date, even if the contract ends earlier than the date specified.

End Date

The calendar date when the contract or contract line ends is displayed.

Billed Thru

The date through which the contract or contract line has been invoiced is displayed.

Start Meter

The beginning meter reading of the unit or item is displayed.

Current Meter

The present meter reading of the unit or item is displayed.

End Meter

The meter reading of the unit or item at contract end is displayed.

Billed Thru Meter

The meter reading at the time that the last contract invoicing was performed is displayed.

Allowance

Specify the value to allow before incurring charges on contract lines. The calculation used the difference between the Start Meter and Current Meter fields.

As Of

The date through which the displayed meter ranges are accurate.

4 Specify this information on the **Billing** tab:

Billing Frequency

Price Basis

Select the method which will be used for calculating charges when invoicing the contract line.

NOTE: A default value for new contract lines can be set on the Contract Parameters tab of the **Service Parameters** form.

Rate

Specify the contract rate. This value is used with the Per fields to calculate the charges for service contract lines.

Prorate Rate

Specify a rate if you are going to prorate the contract.

Meter Rate

Specify the meter rate for the contract.

Per

Select the contract line unit of rate. This value is used in conjunction with the rate to determine the amount of charges to apply to a contract line.

- **Hour**: Multiply rate for the contract line on an hourly basis
- **Day**:Multiply rate for the contract line on a daily basis
- **Week**: Multiply rate for the contract line on a weekly basis
- **Month**: Multiply rate for the contract line on a monthly basis
- **Year**: Multiply rate for the contract line on a yearly basis

Include Waiver Charge

Select this check box to include the waiver charger amount for the contract line.

Contract Basis

This field is for informational purposes only and is used by the entrant of the contract line to list the base or estimated amount to be used for the contract.

Total Billed

The running total of invoiced charges for the service contract or contract line is displayed.

5 Specify this information on the **Entitlements** tab:

% Of Labor Covered

Specify the percentage amount that a customer is charged for each labor transaction. As service transactions are posted for the particular unit or item under contract, the system will automatically calculate the price of the transaction based on the percentage not covered. The entitlement calculation can also take into account different percentages based on the service order SRO Type, the Work Code of the labor transaction, or a combination of the two.

For example, if expenses are completely covered, then the % Of Coverage would be set to 100%. If only 10% of transaction is going to be charged, then the % Of Coverage would be set to 90%.

% Of Material Covered

Specify the percentage amount that a customer is charged for each material transaction. As service transactions are posted for the particular unit or item under contract, the system will automatically calculate the price of the transaction based on the percentage not covered. The entitlement calculation can also take into account different percentages based on the service order SRO Type, the Family Code of the item on the material transaction, or a combination of the two.

For example, if expenses are completely covered, then the % Of Coverage would be set to 100%. If only 10% of transaction is going to be charged, then the % Of Coverage would be set to 90%.

6 Specify this information on the **Tax Info** tab:

Tax Code

Select the tax code, which represents how the sales tax is calculated. The codes are set up and maintained on the **Tax Codes** form.

7 The **Contract Surcharges** tab shows a grid display of surcharges.

NOTE: Negative contract surcharges are not supported.

8 Save the new record.

Creating a Fixed Contract

Follow these steps to set up an annual service contract:

1 Open the Service Contracts form.

Turn off Filter-in-Place and select **Actions > New**.

Follow the steps in Adding a Contract to set up the new contract.

For a fixed contract, select the Fixed Billing Type.

For a calculated contract, select the Calculated Billing Type.

2 Click **Lines** to launch the **Service Contract Lines** form. For a fixed contract, you have the option to add new lines or not. Lines added for a fixed contract are for information purposes and do not affect billing.

Follow the steps in Adding Contract Lines.

3 Save the contract.

Setting Up Contract Line Entitlements and Surcharges

On the **Service Contract Lines** form, you can set up entitlements and surcharges for each contract line.

Entitlements

Specify the percentage amount that a customer is charged for each material or labor transaction. As service transactions are posted for the particular unit or item under contract, the system automatically calculates the price of the transaction based on the percentage not covered. For example, if labor is completely covered, then the % Of Coverage would be set to 100%. If only 10% of a transaction is going to be charged, then the % Of Coverage would be set to 90%. The system uses this formula:

List Price * (100 - Entitlement/100)

The entitlement calculation can take into account different percentages based on the service order SRO Type, the Work Code of the labor transaction, or a combination of the two. For material transactions, the SRO Type and Family Code of the item determine the entitlement level.

You can create multiple labor and material coverage entries so that different work codes and family codes use a specific coverage value.

Surcharges

On the Contract Surcharges tab, specify surcharges for each contract line, allowing miscellaneous charges to be added to the contract. When invoiced, the contract pricing routine uses the percentage or fixed amount specified to calculate any surcharges. Charges can be recurring or one-time fees. You can set them up as a flat rate or a percentage of the contract price.

Surcharges are displayed as a line item on the contract invoice.

Setting Up Service Contract Maintenance Schedules

Service Contract Maintenance Schedules Setup

Any contract line that requires routine maintenance must have at least one contract maintenance schedule defined in order for an SRO to be generated at the specified frequency.

Each maintenance record contains the frequency of the visits and a description of the work that needs to be done. Attached to the maintenance record are units that need serviced along with the operations that need to be completed. Other settings include:

- **All Units from Customer and All Lines from Contract:** Allow for quick setup and ease of future expansion of these contracts.
- **All Operations from SRO:** Allows for quick setup by leveraging a standard template that can be created for generic maintenance packages.

- **Auto Create Incident:** Allows for an incident to be created for each SRO, which is recommended for multi-site end-users requiring cross-site customer contract maintenance.

Process Flow

Follow these steps to set up a schedule:

1 Select Actions > New on the Service Contract Maintenance Schedules form.

2 Specify these fields:

Contract

Select the unique alphanumeric used to identify a contract.

Maint Line

The default order is 1, 2, 3, and so on, but you can specify the value manually when entering additional line records.

Status

The status of the contract is displayed. The status can be estimate, template, open, hold, or closed.

Description

Specify a description for the contract.

Start Date

The current date is displayed. You can specify a different date.

SRO

Select the SRO.

Frequency

Select a frequency to determine how often to produce maintenance service orders. Options are:

- **Every:** Uses the duration fields to create an SRO every interval.
- **Once:** Creates an SRO one time.
- **Annually:** Uses the month and day fields to create a service order on a specific date each year.

Date Duration

Specify the length of time the maintenance will take. This value is used in conjunction with the Increment or Duration Type field to determine the calculation.

Increment

Select the increment time for the schedule. Available choices are Day(s), Month(s), Year(s), or Meter.

Down Time

Specify the number of days needed to perform maintenance work.

Lead Time

Specify the length of time needed to prepare for the work to be performed.

Lead Time Type

Select the frequency to use in conjunction with the Lead Time to determine when the maintenance service order is created. Options are:

- **Every:** Uses the duration fields to create an SRO every interval.
- **Once:** Creates an SRO one time.
- **Annually:** Uses the month and day fields to create a service order on a specific date each year.

Cust PO

Specify the customer purchase order. A value is required for this field if the PO Required flag is selected.

Auto Generate PO

Select this check box to automatically create a purchase order for the maintenance service order generated by SRO creation routine.

Auto Create Incident

Select this check box to have one incident created for each SRO generated from the **Service Contract SRO Generation Utility**.

Last SRO

The last service order that was generated for the maintenance line is displayed.

Lead Partner

Select the partner responsible for the SRO.

Schedule Basis

Select a value to determine whether maintenance service orders are generated based on the end date, close date, or maintenance date of the last SRO.

Schedule Future

Select this check box to create maintenance service orders based on the frequency selected, and regardless of any prior SROs open in the system for the selected maintenance line.

Use Fixed Price

Select this check box to add a line and a project/fixed operation to the SRO as it is created for billing purposes.

Fixed Price Billing Amount

Specify the billing amount to be assigned to the created SRO when the Use Fixed Price check box is enabled.

Include Tax in Price

Select this check box to include any tax amounts as part of the price. This option applies for the billing type of project/fixed.

All Operations From SRO

Select this check box to create a service order operation for each operation on the selected SRO or SRO template.

All Lines from Contract

Select this check box to create a service order line for every line on the contract.

All Units From Customer

Select this check box to create a service order line for every unit owned by the customer on the contract.

3 Save the new record.

Determining if a Contract is Profitable

To determine if a contract is profitable, use the **Service Contract Profit Analysis Report**. This report shows the total amount invoiced for a contract minus the amount of cost incurred by servicing the customer. You can cross-reference an SRO to a contract number on the **Service Order Lines** form to perform this analysis. Only service order lines with the contract number populated are included in the costs calculation of the contract.

1 On the **Service Contract Profit Analysis Report**, specify the information to include in the report:

- The range of contracts
- The range of customers
- The range of invoice dates

2 Select **Show SRO Detail** if you want to include the details of the associated SRO in the report.

3 Click **Preview** to preview the results before printing.

4 Click **Print** to print the report.

Running the Service Contract Renewal Listing Report

1 Open the Service Contract Renewal Listing Report.

2 Select the billing frequencies to include in the report:

- Monthly
- Bi-Monthly
- Quarterly
- Semi-Annually
- Annually

- Elapsed Days
- One Time

3 Select Display Report Header if you want to include report headers in the report.

4 Select the ranges of contracts, customers, and items to include in the report.

5 Specify this information:

Period

Select the financial period to include in the report.

Year

Select the year for which you want to run the report.

Days Look Ahead

Optionally, specify a number of days to look ahead before the period start date.

6 Click Preview to preview the report output.

7 Click Print to run the utility and print the report

Invoicing a Service Contract

Invoicing a Contract

To invoice a contract, follow these steps:

1 Run the **Service Contracts to be Invoiced Report** to review which contracts are ready to be invoiced. Follow the steps in Running the Contracts to be Invoiced Report.

Only contracts with a Billed Thru date earlier than the Contracts to be Renewed Before date are included on the report. For fixed contracts, the Billed Thru date on the contract header is used. For calculated contracts, the Billed Thru date on each contract line is used.

2 Run the **Service Contract Invoicing** utility for the contracts that are ready.

To run contract invoicing:

1 Open the Service Contract Invoicing form.

2 Specify this information:

Contracts To Be Renewed Before

Select the same Contracts To Be Renewed Before date as you used on the report.

Invoice Date

Select the date to use for invoicing.

Print Fixed Contract Lines

Select this check box to include fixed contract lines in the output.

Translate to Domestic Currency

Select this check box to translate the currency to the domestic amount on the output.

Print Euro Total

Select this check box to print the total in both the Euro currency and the transaction currency.

Use Profile

Select this check box to use the associated vendor or customer document profile, if one exists.

Print Zero Balance Contracts

Select this check box to include a contract even if the contract balance is zero.

Summarize Line Periods

Select this check box to print a billing summary for the contract line instead of printing multiple lines. For example, if the contract is $10/month, billed monthly, and you are

performing an invoice for three months, select this check box to print $30 instead of three lines showing $10 each.

Include Rental Contracts

Select this check box to include rental contracts in the invoice.

Include Service Contracts

Select this check box to display only one invoice line per contract line, even if multiple billing periods are due to be invoiced. That one line is a summation of all the periods.

3 In the **Include Billing Frequencies** section, use the check boxes to select the billing frequencies to include in the utility.

4 In the **Note Types** section, use the check boxes to select the notes to include in the output.

5 For these fields, select the range of values to include in the process:

- Contract
- Line
- Service Type
- Customer
- Invoice
- Invoice Date

6 Specify these reprint options:

Invoice

Select the range of invoice numbers to include.

Invoice Date

Select the range of invoice dates to include.

7 Click **Process** to run the utility and complete invoicing.

Click **Reprint** to print the data without any updates or to reprint the invoice.

After running the utility, an A/R invoice record is created. Use the **A/R Payment Posting** form to update the customer balance.

Running the Service Contracts to be Invoiced Report

Follow these steps to run the report:

1 Open the Service Contracts To Be Invoiced Report.

2 Specify the range of values to include in the report:

- Contract
- Contract Line
- Service Type

- Customer

3 Select the date to use to determine if a contract or one of its lines is eligible to be invoiced. Only contracts or contract lines where the Billed Thru date is less than or equal to this date is invoiced.

4 For the **Contracts To Be Renewed Before** date, select **Increment Date** if appropriate.

5 Select **Page Between Customers** to create page breaks between customers on the report.

6 Select which frequencies of the billing cycle to include on the report:

- Annually
- Semi-Annually
- Quarterly
- Bi-Monthly
- Monthly
- One Time
- Elapsed Days

7 Select which notes to include on the report:

- Contract
- Customer

8 Click **Preview** to preview the results of the report.

9 Click **Print** to run the report and print the output.

Multi-Lingual Invoice Support

With service order and contract invoices, you can print items, ship via, and general invoice text in the customer language, based on the customer language code, if the translated text is defined on these forms:

- **Multi-Lingual Service Invoice form:** Define and store translated invoice text for each customer language code. The standard invoice text is defined on the Service Parameters form, and you can enter different translations by language code.
- **Multi-Lingual Ship Via form:** Define and store the translated description of the shipping method.
- **Multi-Lingual Item form:** Define and store translated item descriptions.

Setting Up Rentals

Follow these steps to set up a rental contract agreement:

1 On the **Service Items** form, set up each item to be rented.

On the General tab, specify the fields in the Other section. Specify a meter Label if you need to calculate the rental amounts by meter.

On the Contract Rate tab, set up the different rates for service types.

On the Contract Surcharges tab, set up one-time or every time surcharges, and specify which G/L account receives the additional revenue.

On the Item Warehouse tab, set up the items available for rental in each warehouse.

2 On the **Service Types** form, set up rental service types. Follow the steps in Setting Up Contract Service Types.

3 Use the **Service Contracts** form to bill for rental activity. Follow the steps in Adding a Contract to set up the rental contract. Select the Calculated Billing Type.

4 On the Lines tab, click **Lines** to specify the equipment to be rented.

Follow the steps in Adding Contract Lines to set up lines for the rental agreement.

Click **Available** to launch the **Contract Item Availability** modal form to view the equipment that is available from the warehouse.

5 Save the new lines and contract.

Generating an Item Rental History Report

Use the **Item Rental History Report** to generate a report that lists the contract lines for the range of units or items. Follow these steps to create the report:

1 For these fields, select the range to include in the report:

- Item
- Unit
- Customer
- Contract
- Invoice Date
- Start Date

2 Select the **Include Open Contract** check box to include contracts that are currently flagged as open in the report.

3 Click **Preview** to view the report before printing the final version.

4 Click **Print** to print the final report.

Creating and Invoicing a Long Term Rental Agreement

Follow the steps in Setting Up Rentals to set up a long term rental.

You can click **Agreement** on the **Service Contracts** form to launch the **Service Contract Rental Agreement**

Follow these steps to invoice a long term rental:

1. Run the **Contracts to be Invoiced Report** for the current date to preview the rental billings.
2. Run the **Service Contract Invoicing** utility for the current date to process and print the invoice.
3. After running **Service Contract Invoicing**, an A/R invoice record is created.
4. Use the **Invoice Posting** form to update the customer balance.
5. Use the **A/R Payments** form to accept payments for the contract.
6. If you have the Point of Sale module, click **Checkout** on the **Service Contracts** form to launch the **POS Checkout/Checkin** form.

   Click **Logon** to log in to a cash drawer using the **POS Logon** form. Process the rental billing at a counter and transact the payment.

   You can adjust the Contract Lines in the Details section of the **POS Checkout/Checkin** form.

   When the payments match the Total Due, the Balance is 0, and you can click **Process**.

Use the **Item Rental History Report** to review the rental history of an item.

Using Contracts to Generate Service Orders

Follow these steps to create a service order from a contract:

1. Open the **Service Contracts** form and select the contract that you want to use. Or, follow the steps in Adding a Contract to create a new contract.
2. On the Maintenance tab, click **Contract Maintenance Schedules** to launch the **Service Contract Maintenance Schedules** form, filtered for the current contract.
3. On the **Service Contract Maintenance Schedules** form, select the SRO or SRO Template that you want to use as the basis for the new SRO.

   Specify the fields on the form to set up a recurring service schedule for the units under the contract.

   Save the schedule.
4. Launch the **Contract SRO Generation Utility** to create a service order from the contract.
5. Specify these fields on the utility:

   Contract Starting/Ending

   Select the range of contracts to include.

   Customer Starting/Ending

   Select the range of customers to include.

Through Date

Specify the date through which to automatically generate the SROs. This date is used in conjunction with the other ranges specified to determine if any units are due for planned maintenance. SROs are created accordingly.

Preview/Commit

To view the results of running the utility without saving the results in the database, select **Preview**.

To save the results in the database, select **Commit**.

Process button

Click this button to run the utility.

6 After successfully processing the utility, the new SRO number is displayed in the grid.

7 Review the results of the new SRO on the **Service Orders** form.

Contract SRO Generation

You can run a utility in the foreground or background that evaluates all maintenance schedules to determine if they are due for service. If the Last SRO field is populated on the Maintenance schedule, the SRO Maintenance Date/Close Date/End Date (depending on the schedule basis) and the Frequency are used to calculate whether or not another SRO should be created.

Amortizations

Using Amortizations

An amortization is the reduction of the value of an asset by prorating its cost over a period of time. Use amortizations to extend expenses over a predefined period of time. Expenses such as contract maintenance for a building, insurance payments or capital expenditures are examples of occasions to create amortization schedules. You can create amortization schedules to recognize revenue over a predefined period of time. You can set up schedules manually and automatically.

Follow these steps to set up amortizations:

1. Set the default options on the **Service Parameters** form. Follow the steps in Setting Up Amortizations.
2. Create a new contract with annual Billing Frequency and fixed Billing Type. Follow the steps in Adding a Contract.
3. Follow the steps in Adding Contract Lines to add a contract line.
4. Invoice the contract. Follow the steps in Invoicing a Contract. The amortization is automatically created during contract invoicing.
5. The system debits the sales account from the distribution account specified on the contract, and credits the amortization prepaid expense account specified on the **Service Parameters** form.
6. Use the **Amortization Transaction by Account Report** and **Outstanding Amortization by Account Report** to review details about amortizations.

Setting Up Amortizations

Use the **Service Parameters** form to set default options for amortizations. On the Amortization Control tab, specify this information:

Total Periods

Specify the total number of periods that the amortization amount is divided amongst. The value set on the **Distribution Accounts** form is used as the default on the **Amortizations** form. For the purposes of amortization, each month end date designates the end of period.

Journal

Select the accounting journal to use for the amortization.

Select Trans Date From

Select whether amortizations should occur at the start or the end of the period.

Amortize Contracts

Select this check box to include contracts in the amortization.

Amortization Prepaid Expense Account

Select an account from the chart of accounts to use for the amortization.

Amortization Deferred Revenue Account

Select an offset account from the chart of accounts to use for the amortization.

You can also set amortization controls on the **Service Distribution Accounts** form. On this form, you can configure one product code to automatically generate amortization schedules through contract invoicing, while another product code does not.

Maintaining Amortizations

Use the **Amortizations** form to maintain, update, and create amortizations.

Follow these steps when setting up a new amortization:

1 Specify these fields in the **Header section**:

Amortization

Specify a unique alphanumeric identification, or let the system create a default number after saving.

Customer

Select the customer to use for the amortization.

Status

For new amortizations, the status is Open.

Status options are:

- **Open:** The amortization is in process.
- **Hold:** The amortization has been stopped.
- **Complete:** The amortization process is finished and closed.

Reference

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank, the system creates a new record of the reference type specified when the cross-reference is performed.

2 Specify these fields on the **General tab**:

Total Amount

Specify the total amount to be amortized.

Total Periods

Specify the total number of periods that the total amortization amount is divided between. For the purposes of amortization, each month end date designates the end of a period.

Start Date

The current date is displayed. Optionally, select a different date.

Amount Amortized

The total amount that has been generated for the amortization is displayed.

Amount Posted

The total amount that has been posted for the amortization is displayed.

Amount Remaining

The outstanding amount that has not been posted for the amortization is displayed. This amount is the total difference between the Total Amount and Amount Posted values.

Created From Order

This check box is selected if the amortization was created from an order.

Invoice

If the amortization was created from an invoice, the invoice number is displayed.

Journal

Select the accounting journal to use for the amortization.

Amortization Account

Select an account from the chart of accounts to use for the amortization.

Offset Account

Select an offset account from the chart of accounts to use for the amortization.

3 Specify these fields on the **Amortization Schedule tab**:

Amortization Schedules button

Click this button to launch the **Amortization Schedules** form.

Generate button

Click this button to generate the amortization based on the information specified on the General tab. The generated information is then displayed in the grid with an Open status.

Delete All button

Click this button to delete all generated amortizations that have an Open status. This does not impact any amortizations with a Posted status.

Post Date

The date of the posting is displayed. You can select an alternate date.

Post Line button

Click this button to post a selected amortization line. This works in conjunction with the Post Date field by assigning a post date to the amortization and changing the status from Open to Posted.

4 Click **Save**.

Scheduling Amortizations

Use the **Amortization Schedules** form to set up and maintain the schedule of amortized items.

To set up a new schedule, specify these fields:

Amortization

Select the alphanumeric code for the amortization.

Status

The current status of the amortization is displayed.

Status options are:

- **Open:** The amortization is in process.
- **Hold:** The amortization has been stopped.
- **Complete:** The amortization process is finished and closed.

Seq

The generation number of the amortization is displayed. Each monthly increment of the amortization is assigned a number starting with 1, then 2, then 3, and so on with an increase of one.

Amount

Specify the total amount to be amortized.

Transaction Date

Select the date of the amortization generation. This date is always a month end date because that is when amortization occurs.

Post Date

The date used for the posting of the amortization is displayed.

Amortization Account

Select an account from the chart of accounts to use for the amortization.

Offset Account

Select an offset account from the chart of accounts to use for the amortization.

Post Date

The date used for the posting of the amortization is displayed.

Post Line button

Click this button to post a selected amortization line. This works in conjunction with the Post Date field by assigning a post date to the amortization and changing the status from Open to Posted.

Running the Amortization Posting Utility

1 Specify the ranges of these values to include in the **Amortization Posting**:

- Customers
- Reference numbers
- Invoice numbers
- Amortization account numbers
- Offset account numbers

2 This information is displayed:

- The period number from the **Accounting Periods** form.
- The fiscal year from the **Accounting Periods** form.
- The post date, which is displayed as the current date. You can select a different date.

3 Select **Update Status** to update the Amortization Schedule Status.

4 Select **Post All Past Amounts** to post all past amortization schedule amounts.

5 To view the results before processing, select **Preview** and click **Process**.

6 To run the utility and post the information, select **Commit** and click **Process**.

Contract Coverage Times

Overview

For companies that sell Service Level Agreements, the ability to set proper due dates when service is requested is imperative to avoid violation of a contract. The ability to calculate warning, due, and follow-up dates has been expanded to consider hours specific to a customer contract. You can easily configure and monitor Service Level Agreements with hour-based response times.

General Contract Coverage Setup

Create a priority code for each type of SLA that can be sold. The priority code defines the response time and hours basis for each service level.

Customer Contract Setup

Create a contract for the customer to set up the SLA. Use the **Coverage** tab to establish the coverage terms. Set the Priority Code on the **General** tab to establish escalation periods that will be used on incidents entered for units covered by that contract.

A priority code must be associated to the contract.

If the hours basis of the service agreement differs from that of normal business hours, the days and times can be explicitly stated on the customer contract.

NOTE: Service Agreements can be set up more generically at the customer or item level without requiring a contract, however, the ability to specify unique coverage hours is not supported.

Service Agreement Management

When a call is received from a customer, the priority of the incident is set based on several factors (see About Incident Escalation).

After the proper priority code is determined, the warning, due, and follow-up dates are set using a combination of the Days Until values and the Coverage hours. The Coverage hours can be All Hours (including holidays), Business Hours, or Contract Coverage Hours.

Incident escalation monitors the dates of the incident, so that after the dates are set up based on the proper priority code, no change is needed for the escalation process.

Contract Billing by Elapsed Days

Use the Elapsed Days contract billing option to calculate the amount to invoice based on the time between the last billing and the user-selected Bill Through date. The primary use of this feature is to

improve the ability of the system to handle contracts that are billed in arrears on a regular basis (such as daily, weekly, or monthly).

Process Flow

The **Billing Frequency** field (**Service Contracts** form, and **Service Contract Lines** form) contains an Elapsed Days option. If the value is selected on the **Service Contracts** form, it becomes the default value on each new line.

For example, a contract of Billing Type Calculated is set up with two lines:

- The first has a Last Invoice Date of 1/17/2009. The rate is set to $30 a month. The Billing Frequency is set to Elapsed Days.
- The second has a Last Invoice Date of 2/1/2009. The rate is $35 a week. The Billing Frequency is set to Elapsed Days.

When contract invoicing runs on 2/15/2009, the system calculates the daily rate, and the invoice amount for each contract line is as follows:

- The first line is $28 ($30 a month value minus 2 days).
- The second line is $75 ($35 for 2 weeks plus 1 day.)

In the event that the contract is a different value than the line, and the Billing Type is Fixed, the Contract header Billing Frequency is used upon invoicing, overriding the value on the **Contract Lines** form.

NOTE: The Elapsed Days Billing Frequency and the Prorate to End of Billing are not permitted on the same contract.

Inspections

About Inspections

If your technicians perform service inspections on equipment as part of service orders or contract maintenance, you can build sets of steps to guide them through inspections. Inspections of similar equipment often share steps that can be reused.

Set up structures for inspections using these forms:

- **Inspection Types:** Categorize the inspection steps and associate multiple inspections to one item.
- **Inspection Measurement Types:** Define the type of measurement reading for the inspection task: Specific List, Numeric, or Freeform.
- **Inspection Section Codes:** Define and group the inspection tasks for readability.

You can link inspection types to specific items on the **Inspections Setup** form. You can use the **Inspections Setup Copy** form to copy an existing set of inspection steps to reuse them for a similar type of inspection.

When service orders are created and an item or unit is specified with an inspection type on the SRO line, technicians inspect the item or unit as part of the service order. The inspection results for that inspection type and item combination are copied to the line. The values measured for each inspection task can be entered from a mobile device using the Service Management Mobile solution, or using the **Service Order Line Inspections** form in the back office.

After all inspection tasks are complete, click **Finalize Inspection** on the SRO line to verify that all tasks are complete. If they are complete, the current date is assigned to the SRO line as the Inspection Finalized date, and the Inspection records are locked down to prevent the data from being altered. You can produce an **Service Order Inspection Report** that lists each inspection task for the SRO item and inspection type, color-coding the data based on the level of completeness the task reached.

- **Blue:** Incomplete
- **Orange:** Adjusted failure
- **Red:** Failure
- **Black:** Complete, with no failures or adjustments

Setting Up Inspections

If your service technicians perform service inspections on equipment, use these steps to set up your system:

1 On the **Inspection Types** form, create the types of inspections your company performs, for example, Annual or Post-Repair, and specify a description for each.

2 On the **Inspection Measurement Types** form, define the type of readings to be taken. Specify these fields:

Measurement Type

Specify a type for the measurement, for example, Pressure or Pass/Fail.

Response Type

Select a response type:

- **Numeric**: Values are specified at the task level.
- **Freeform**: Values are specified at the task level.
- **Specific List**: In the grid, specify the options the user can choose. For example, the options could be Yes or No. You can then select the **Failure** check box to indicate which of these options is considered a failure of the test.

3 On the **Service Inspection Tasks** form, describe the task. This can be a reusable task that you can include in many checklists. For example, you could include Tire Pressure in an inspection of any bike. Specify these fields:

Inspection Task

Specify a name that describes the type of inspection (action or verification) to be performed. If this task is reused, specify a generic name to use in all cases.

Description

Specify a description of the task.

Measurement Type

Select a type from those defined on the **Inspection Measurement Types** form.

Numeric Format

When the **Measurement Type** is set to Numeric, use this field to specify the number of digits before and after the decimal, and whether the value is padded with zeros. For example, 4.5 displays up to 4 digits before the decimal point and up to 5 digits afterward. Use **>** to indicate a blank placeholder and **9** to indicate either a number or a zero placeholder. For example, the format 999.2 displays the value 65.2007 as 065.20. Other valid characters in the format are **# . ,** and **%**, which are displayed as constants.

Low Value

Specify the lowest value. If the inspection reading is equal to or greater than the value you specify, the inspection task is marked as a success.

High Value

Specify the highest value. If the inspection reading is equal to or less than the value you specify, the inspection task is marked as a success.

Expected Value

Specify the ideal value for the inspection reading. If the selected Measurement Type was set with the Response Type Specific List, then the list of options you specified are displayed here as a drop-down list to select from.

U/M

Specify the unit of measure to use for this test. For example, if you are measuring tire pressure, the U/M is PSI.

4 On the **Inspection Section Codes** form, set up codes that you can use to group inspection tasks. These section codes are required on the **Inspections Setup** form, and are used in the inspection tree on the **Inspection Setup Preview** form and on reports.

The order in which the sections appear in the tree is based on the Report Output Value you specify here. Inspection tasks are grouped by section from the lowest report output value to the highest.

5 On the **Inspections Setup** form, associate any item from your **Items** form with an inspection type and section code. These two fields identify the type of tasks to be performed, so you can set up multiple types of inspections for one item. Select tasks to be performed during this type of inspection.

For example, you could define an installation inspection type with three different section codes. You can include the same task, Verify Power is Shut Off, in each section.

One section can contain multiple tasks. After you select each task, the information you set up for the task (measurement type, high value, low value, etc.) is displayed in the grid.

6 Save the configured inspection setup.

7 To review the structure of the configured inspection in a tree view, click **Preview** on the **Inspections Setup** form to launch the **Inspections Setup Preview** form. On this form, you can click on any of the tasks in any of the sections to see details about the task.

If you want to add a new inspection setup that is similar to an existing one, use the **Inspections Setup Copy** form.

Completing Inspections on an SRO

Follow these steps to complete an inspection:

1 On the **Service Order Lines** form, identify the type of inspection to be performed.

Click **Inspections** to launch the **Service Order Line Inspections** form, filtered for the currently selected line.

2 On the **Service Order Line Inspections** form, specify the resulting measurements for each inspection task.

Select the **Inspection Applicable** check box to identify measurements that might not apply.

For owners of the Service Management Mobile application, you can specify measurements using a mobile device, and only need to use this form for review.

3 After all inspection tasks on an SRO line are considered complete, you can finalize them.

On the Inspections tab of the **Service Orders** form, click **Finalize Inspection**.

You can use the **Service Order Inspection Report** to review the status of inspection tasks, and to confirm the completeness of the inspection.

Reviewing Inspections of a Unit

When you perform an inspection on an SRO line that has a unit number assigned to it, the inspections are associated with that unit. You can review the inspections in multiple ways:

- You can view the results of inspections for specific components of a unit on the Inspections tab of the **Unit Configurations** form.
- You can filter by the Line Unit on the **SRO Inspections Report**.

Adding an Inspection to a Service Order

After you have set up inspections as described in Setting Up the System for Service Inspections, you can add an inspection through a service order:

1 Create a service order on the **Service Orders** form.

2 Add a service order line, and specify an item. If configurable inspections have been defined for that item, you can select an **Inspection Type**.

3 In the Inspections tab on the **Service Order Lines** form, you can see the tree that shows the inspection sections and tasks.

4 Click **Inspections** to launch the **Service Order Line Inspections** form. Inspection tasks associated with this service order line are displayed in the bottom grid, along with information about the measurement type, expected value, etc. Indicate whether each task is required for this inspection and save the record.

5 After the inspection, the technician enters the actual Measured Value and, if necessary, Adjusted Value.

6 Information about whether the inspections passed or failed is returned to the service order line.

Partners

About Partners

Service partners perform the work for service request orders and incidents. Employees, customers, and vendors can be set up as partners based on the type of service a company provides.

- **Employees:** Used when a company uses the internal staff to perform a service.
- **Customers:** Used when a company uses a dealer network to perform a service.
- **Vendors:** Used when a user is the reseller of a product, but uses manufacturer resources to perform a service.

Partner Dispatching/Scheduling

You can schedule a partner to handle various service tasks, including incidents, events, and service orders. Use these forms to set up and maintain schedules for partners:

- **Partners:** On the **Scheduling** tab, specify a weekly schedule for a partner.
- **Partner Create Utility:** Use this form to do a mass creation of partners and schedules.

Issuing Expenses to Service Orders

Partners can issue materials, record labor hours, and track miscellaneous expenses incurred during service calls. You can bill these expenses to the customer or record them as warranty expenses. As materials are issued to a service order, inventory is automatically relieved and the quantity on-hand values are updated. When a labor transaction is posted, the system applies any existing fixed or variable overhead for the department assigned to the partner.

Partner Reimbursements

At times, a partner may not be employed by the company providing a service. In these cases, the partner may need to be reimbursed for material or labor transactions that have been posted to a service order. After the service is complete and the partner reports the expenses, the system creates records for the partner to be reimbursed for the expenses.

Partners can also be reimbursed for miscellaneous expenses, such as meals and lodging.

Setting Up the System for Partners

Setting Up Service Parameters

See Setting Up Service Parameters (Infor CloudSuite) on page 8.

Setting Up Partners

A partner is a resource (employee, customer, or vendor) who can resolve incidents or SROs. Partners can be specified as the SSR and/or as the "owner" of an incident. Partner IDs can be linked to employee IDs, customer IDs, vendor IDs, and/or user IDs.

Use the **Partners** form to specify information about your company's partners:

1 In the header area of the **Partners** form, specify this information:

Partner

Specify an abbreviated version of the name of the partner.

Type

Select the category that a partner belongs to:

- Employee
- Customer
- Vendor

Ref Num

Select the partner reference number. This is the associated customer, employee, or vendor.

Ship To

Select the ship to location to associate with the partner. This field is enabled only for partners with the type Customer.

Name

Specify the name of the partner.

Active

Select this check box if the partner is currently active.

Supervisor

Select the supervisor of the partner.

Schedule Button

Click this button to launch the Service Scheduler.

2 On the **General** tab, specify this information:

Email

Specify the email address.

Warehouse

Select the warehouse that a partner may issue inventory out of while working on a SRO.

Labor Cost

Specify the hourly cost for a partner.

Hourly Rate

Specify the hourly rate of a partner for the type of work being performed.

Default Misc Code

Select the unique alphanumeric code that represents a particular type of expense that is charged to a SRO. These codes can be used to ensure that the expenses are charged to the proper general ledger account. These codes are set up on the **Miscellaneous Codes** form.

Default Work Code

Select the code used to represent the type of work that is being recorded to a SRO. Codes are set up and maintained on the **Work Codes** form.

Default Payment Type

Specify the payment type to be used by default for miscellaneous SRO transactions that are submitted from the Reseller Portal. Available selections are set up and maintained on the **Payment Types** form.

Department

Select the department out of which the partner works.

User

Select a User ID from the list. The list is populated from the **Users** form.

Reimbursement Method

Select the method to be used or the type of payment to be included for partner reimbursements. Valid options are voucher, credit memo, other, and all.

Reimburse Material

Select this check box to reimburse the partner for material transactions on incidents that the partner is assigned to. If this field is not selected, costing is not affected for associated transactions.

Reimburse Labor

Select this check box to reimburse the partner for labor transactions on incidents that the partner is assigned to. If this field is cleared, costing for the associated transactions is not affected.

Currency

Select a default currency code to associate with the partner. This will be used for reimbursement currency conversion.

3 On the **Scheduling** tab, specify the availability and location of this partner:

Weekly Available Hours

Specify the maximum block of time that a partner is to be scheduled for a task or tasks on any given day.

Display On Schedule Board

Select this check box to display the partner on the board within the Service Scheduling module.

Exchange Integration Enabled

This check box is selected if the Exchange Integration service is enabled for the user.

Exchange Folder

Optionally, specify a destination folder for the Exchange Integration service. In most cases, this field can be left blank and the appointments will be synchronized with the user's default Inbox Calendar based on the email address setup in Exchange.

In the Last Known Location section of this tab:

- Click History to launch the Partner Location History form.
- Click Map Current to send the current partner location to MapPoint.
- Click Map All to send all partner last-known locations to MapPoint.
- Last Timestamp displays the date and time that the last GPS coordinates were collected.
- Latitude and Longitude display the values from the last time a coordinate was collected.

4 On the **Certifications** tab, select any certifications acquired by the partner. (Certification codes are defined on the **Certifications/Licenses** form.) These certifications are matched with any required certifications for a certain item (in the **Items** form) to determine if a partner has the necessary qualifications to work on a SRO or on an incident involving a particular item. The description of the certification displays after you select the code.

5 On the **Skills** tab,select any skills acquired by the partner. (Skill codes are defined on the **Skills** form.) These skills are matched with any required skills for a certain item (in the **Items** form) to determine if a partner has the necessary qualifications to work on a SRO or on an incident involving a particular item. The description of the skill displays after you select the code.:

6 On the **Areas** tab, specify where this partner can be used:

Region

Select the region code for the partner.

Description

The description of the region is displayed.

Country

State

County

City

Postal Code

7 On the **Team** tab, set up partners as teams. Service scheduling uses this information to dispatch partners as a group. The system creates individual appointments for each team member as new appointments are created and assigned to the team. Specify this information:

Partner

For partner records that are set up as a team, select the partners that make up the team.

NOTE: Partners can be members of more than one team.

Name

The partner name is displayed.

Team

Select any team(s) to which the partner belongs.

NOTE: A team record is set up in the same way as a partner record using the **Partners** form.

Name

The partner name is displayed.

Team Substitutions Button

Click this button to launch the **Partner Substitutions** form, filtered for the selected partner/team record and the current system date.

Refresh Skills Button

Click this button to delete all the skills currently associated with a team and rebuild the list by adding skills currently held by any partner on the team. The new skill set is stored on the **Skills** tab of the team record.

Refresh Certifications Button

Click this button to launch the **SRO Quote** form, linked for the current SRO.

Click the **Schedules** button to display the **Service Schedules** form, where you can see scheduled appointments related to service work.

Performing a Mass Creation of Partners

Use the **Partner Create Utility** to do a mass creation of partner records. Follow these steps to use the utility:

1 For these fields, select the range to include:

- Customer
- Vendor

- Employee

2 Select **Include Customers** to include the range of customers in the records.

3 Select **Include Vendors** to include the range of vendors in the records.

4 Select **Include Employees** to include the range of employees in the records.

5 For each day, specify the maximum hours that a partner can be scheduled for a task or tasks.

6 Specify this information:

- The department out of which a partner works.
- The warehouse that a partner may issue inventory out of while working on a SRO.
- The hourly cost for using this resource.
- The method to use or the type of payment to include for partner reimbursements.

1. Select **Override Employee Departments** to use a department other than the one in which the partner works.

7 Select **Reimburse Material** to reimburse the partner for material transactions on incidents that the partner is assigned. If this check box is cleared, costing is not affected for associated transactions.

8 Select **Reimburse Labor** to reimburse the partner for labor transactions on incidents that the partner is assigned. If this field is cleared, costing for the associated transactions is not affected.

9 Click **Process** to run the utility.

Using the Partner Console to View Assignments

Use the **Partner Console** to quickly view the incidents, transactions, and schedule for a selected partner.

1 Specify this information:

Partner

Select the partner for whom you want to view information.

Status

Select **Open** or **Complete** status to filter incidents by status.

Date Range

Select the range of calendar dates to include in the results.

2 Use these buttons on the form:

- **Clock On:** Start data collection of labor time of the partner for a selected item.
- **Clock Off:** Stop data collection of labor time of the partner for a selected item.
- **Transactions:** Open the **Service Order Transactions** form.

3 This information associated with the operation is displayed:

- Customer
- Item and description
- Customer item
- Start and end date

Tracking and Approving Partner Transactions

Use the **Inspector Workbench** to track and approve service order labor and material inspections that require inspection. The information displayed is based on the partner chosen as the inspector.

1 Specify this information:

Approver

Select the partner assigned to inspect and approve service order labor and/or material transactions.

SRO

Select the service order that you want to track.

Line

Select the SRO line to track.

Operation

Select the SRO operation to track.

2 Use these buttons:

- **Select All:** Click this button to select all records for processing.
- **Deselect All:** Click this button to clear the selection of all records for processing.
- **Sign Off:** Click this button to approve selected labor or material transactions that have passed inspection.

Handling Partner Expenses

Approving Partner Expenses

Use the **Expense Approval** form to approve material, labor, and miscellaneous transactions entered by a partner. Partner transactions must be approved prior to reimbursement or reconciliation.

1 Specify this information on the form:

Bill Manager

Select the partner identification of the person responsible for verifying that the SRO is properly invoiced.

Partner

Select the partner associated to the SRO.

SRO

Select the SRO associated to the expense.

Line

Select the SRO line associated to the expense.

Operation

Select the SRO operation associated to the expense.

Reimbursement Status

Select the status of the transaction:

- **Approved:** Transactions that have been entered and approved for reimbursement.
- **Open:** Pending transactions that have not been approved.
- **Complete:** Transactions that have been approved and paid.

2 These values are displayed:

- **Material:** This field shows the running total of material expenses for the selected lines with a reimbursement status of approved or open.
- **Labor:** This field shows the running total of labor expenses for the selected lines with a reimbursement status of approved or open.
- **Miscellaneous:** This field shows the running total of miscellaneous expenses for the selected lines with a reimbursement status of approved or open.
- **Total:** This field shows the running total of labor, material, and miscellaneous expenses for the selected lines with a reimbursement status of approved or open.

3 Click **Refresh** to populate the grids with the applicable transactions.

4 Select individual transactions in each grid or click Select All to select all the transactions for approval.

5 Click **Approve** to process the approval.

Buttons

Use these buttons on the form:

- Click **Refresh** to display the lines that correspond to the Reimbursement Status field.
- Click **Select All** to mark all records for processing.
- Click **Deselect All** to remove all records for processing.
- Click **Approve** to approve the selected records.
- Click **Unapprove** to unapprove the selected records.

Running the Miscellaneous Expense Report

Use the **Miscellaneous Expense Report** to generate a list of partner expenses. Follow these steps to run the report:

1 Open the Miscellaneous Expense Report form.

2 Specify the range of values to include on the report:

- Partner ID
- Transaction Date
- SRO number
- SRO line numbers
- SRO operations
- Payment types
- Miscellaneous codes

3 For the transaction date, select Increment Date, if appropriate.

4 Select a value for **Show Status** to include one of these types of expenses:

- **Approved:** Include expenses that have been approved for the partner
- **Open:** Include expenses that have not yet been approved
- **Complete:** Include expenses that have been approved and paid to the partner

5 Click **Preview** to preview the report output.

6 Click **Print** to generate and print the report.

Reimbursing Partner Expenses

Use the **Partner Reimbursements** form to process partner reimbursements for transactions. The partner must have the material or labor check boxes selected, or have miscellaneous transactions with reimbursable payment types.

1 On the **Partner Reimbursements** form, specify these options:

Partner ID

Select the partner to be reimbursed.

SRO

Select the SRO for the transaction to be reimbursed.

Line

Select the SRO line for the transaction to be reimbursed.

Operation

Select the SRO operation for the transaction to be reimbursed.

2 Select the status of the transaction:

- **Approved:** Transactions that have been entered and approved for reimbursement.
- **All:** All transactions.
- **Open:** Pending transactions that have not been approved.
- **Reimbursed:** Transactions that have been approved and paid.

3 Specify this information:

Pre-Register

For users who want to recognize the Value Added Tax (VAT) as soon as the expense is occurred, you can select an existing Voucher Pre-Register for a vendor that is associated with the partner. This field is disabled if the partner is not associated with a vendor.

Invoice

The invoice number associated with the Voucher Pre-Register is displayed.

Pre-Register Amount

The amount that was set up on the Voucher Pre-Register is displayed.

Pre-Register Tax

The tax that was calculated on the Voucher Pre-Register is displayed.

Additional Charges

Specify any additional charges.

Cost Selected

The cost selected is displayed.

Tax Selected

The tax selected is displayed.

Total

The total amount is displayed.

Amount Due

Specify the total amount due.

Subtotals

The subtotal of each expense type for the selected lines is displayed.

4 Click **Select All** to mark all records for processing.

5 Click **Deselect All** to remove the selected records for processing.

6 Click **Tax Detail** to launch the **Reimbursement Tax Detail** modal form.

7 Click **Process** to launch the **Partner Reimbursement Process** modal form. The amount due is displayed.

8 Specify the Batch ID and a description for it.

9 Click **Process** to run the reimbursement.

10 Click **Cancel** if you do not want to run the reimbursement.

Reconciling Partner Expenses

Use the **Expense Reconciliation** form and **Expense Reconciliation Process** modal form to reconcile partner expenses.

To reconcile expenses:

1 On the **Expense Reconciliation** form, specify this information:

Payment Type

Select the code for the payment type being used. The available selections are set up and maintained using the **Payment Types** form.

Description

A description of the payment type is displayed.

Unreconciled Only

Select this check box to display only expenses that are not reconciled.

Approved Only

Select this check box to display only expenses that have been approved.

Miscellaneous Charges

Specify any additional miscellaneous charges to include in the process.

Selected

The running total of expenses selected for reimbursement is displayed.

Total

The subtotal of reimbursements due, based on the additional charges and Selected field is displayed.

Amount Due

Specify the total amount of expense reimbursement that is due.

2 Click **Voucher** to launch the **Expense Reconciliation Process** modal form, filtered for the selected payment type.

3 Select the vendor for whom you are creating the voucher.

4 Specify the vendor invoice number to be written on the voucher.

5 Click **Process** to complete the expense reconciliation.

To stop the process, click **Cancel**.

Buttons

Click **Clear** to launch the **Expense Reconciliation Process** modal form and clear the charges.

Click **Select All** to mark all records for processing.

Click **Deselect All** to remove the selected records for processing.

Completing SRO Labor Transactions for a Partner

Use the **Service Order Labor Data Collection** form to start and finish labor transactions for a partner. The submitted labor transaction is automatically added to the SRO as a posted or unposted actual transaction. If the **Dc Auto Post Labor** check box on the **Service Orders** tab of the **Service Parameters** form is selected, the transaction is added as posted. If the check box is cleared, the transaction is added as unposted.

Follow these steps to start a transaction for a partner:

6 Open the Service Order Labor Data Collection form.

7 Select the partner for whom you are starting the transaction.

8 Select Start as the transaction type.

9 The Last Transaction and Last Transaction Date fields are read-only.

10 Select these values for the transaction:

- SRO
- Line
- Oper

11 Click **Submit** to complete the start of the transaction.

Follow these steps to finish a transaction for a partner:

1. Open the Service Order Labor Data Collection form.
2. Select the partner for whom you are finishing the transaction.
3. Select Finish as the transaction type.
4. The Last Transaction and Last Transaction Date fields are read-only.
5. Select these values for the transaction:
   - SRO
   - Line
   - Oper
   - Work Code
   - Billing Code
6. Specify these values:
   - Hrs Worked
   - Hours To Bill
   - Cost
   - Rate
7. Specify any additional notes.
8. Click **Submit** to finish the transaction.

Reviewing Partner Location History

When technicians use GPS tracking on Service Management Mobile, each time a reading is sent to the back office the records can be viewed related to the partner on the **Partner Location History** form. The date the location was read and the latitude and longitude of the GPS reading are recorded. This allows you to plot the locations on a Microsoft MapPoint map.

Running the Unified Transaction Report

Use the **Unified Transaction Report** to generate a partner transaction history. Follow these steps to run the report:

1. Open the Unified Transaction Report.
2. Specify the range of values to include in the report:
   - Partner ID
   - Transaction Date
   - SRO Num

3 Select the information you want to include in the report:

- Include Material
- Include Labor
- Include Miscellaneous
- Notes
- Page Break By Partner
- Print Posted Transactions
- Print Unposted Transactions
- Print Internal Notes
- Print External Notes

4 Click **Preview** to view an output of the report.

5 Click **Print** to run the report and print the output.

Scheduling

About Scheduling

An appointment is a scheduled task assigned to a partner. The appointment can be associated with a service order or incident. Appointments are displayed on the **Service Schedules** form in the Scheduling board. You can schedule multiple appointments and multiple partners for one service order or incident. Appointments have a status that is independent from the service order or incident and used for tracking.

Scheduling vs. Dispatching

Although scheduling and dispatching are very similar actions, within this application they are separate processes to support the different ways a partner is assigned to a task.

Scheduling

Scheduling is used when the scheduler wants to view all the partner schedules and place the appointment for new tasks manually into a spot.

If your business typically queues multiple tasks and then schedules them across the partner base at a later time, select the **To Be Scheduled** option on each incident. Then later open the **Service Schedules** form to create the appointments.

The **Service Schedules** form is usually open at all times, and the scheduler drags and drops appointments from the Tasks to be Scheduled grid onto the calendar grid. After the appointment is on the grid, the partner is assigned and the **To Be Scheduled** option on the incident is cleared.

Dispatching

Dispatching is intended to handle scenarios where the task is assigned to a partner using the next available time slot.

If your business typically schedules one task at a time, click **Dispatch** on the **Incidents** form or **Service Orders** form to create the appointment on the **Service Schedule Dispatch** form.

The **Service Schedule Dispatch** form tries to identify the best available partner by matching the duration required by the tasks with the next available partner who has the appropriate skills, certifications and coverage area.

Click **Create Appointment** on the **Service Schedule Dispatch** form to generate a scheduling appointment record for the specified partner.

About Appointments

An appointment is a scheduled task that is assigned to a partner and can be associated with a specific incident or service order.

Using Appointments

Appointments are displayed in the scheduling board on the Schedules form. On that form, you can schedule appointments for service work or for personal time or holidays.

You can schedule multiple appointments against one incident or service order to support multi-day work scenarios or return visits.

Completing an appointment does not complete the associated incident or service order.

Appointment Status

Appointments have their own status that is independent of an incident or service order. These statuses are used for tracking. For example, an appointment could have a status of On-Site if the partner is currently on site working on the incident or service order. Use the Service Appointment Status Codes form to set up and maintain these statuses.

Appointment Types

On the Service Appointment Types form, set up the codes you want to use to categorize appointments. These user-defined types are used throughout the scheduling functionality.

Setting Up the System for Scheduling

Setting Up Scheduling Parameters

Follow these steps to set up scheduling parameters:

1. Launch the Schedule Parameters form.
2. On the Main tab, specify these General fields:

   Assign Lead Partner

   Select this check box to assign the partner dispatched on an appointment as the lead partner of the SRO.

   Dispatch Event Code

   Select the code to use with an event when an appointment is linked to an incident.

   Partner Start Address

   Select the address to help MapPoint determine the starting point when plotting a route.

Partner End Address

Select the address to help MapPoint determine the ending point when plotting a route.

Default Scheduling Method

Select the method to use when entering a new appointment: Single-Day or Multi-Day. For more information, see Scheduling Method.

3 Specify the **Scheduling Board** fields:

Display for Partner

Select the method to use to display Partner Information.

Header Date Format

Select the format to use to display the date when the view mode is set to Partner/Days, Work Week, or Partner Day/Time. For details regarding the syntax for a custom format, see Setting the Header Date Forms.

4 In the **Dispatch Order** section, specify the order of selection using the **Field Order** column and **Required** check boxes. You can mark each field as required if blank values are excluded.

5 On the **Email** tab, specify these fields for appointment notifications:

Email Type

Select the type of email to use.

Email Server

Specify the server to use with the email.

Email Template

Specify a template to use for the email.

Use the pound symbol (#) before and after the field property name to substitute values from the screen. Follow this example for the email template:

Partner ID: *#PartnerID# (#PartnerName#*)
Has been assigned to *#RefType# #RefNum#: #Description#*
Appointment is scheduled for *#ApptStartDate#*

6 Save the parameters.

Maintaining Display Settings

Use the **Service Schedule Profiles** form to maintain the display settings for users. The manner in which this form is set up controls both the look and feel of the calender and the partner and appointment data that is displayed.

A profile determines the way scheduling data is displayed on the **Service Schedules** form. Multiple profiles can be created and saved to allow the scheduler to move between different types of views. For example, you could use a Monthly view or a Weekly view, or display appointments and partners based on specific departments, regions and other groupings.

Follow these steps to maintain the display for a profile:

1 Launch the Service Schedule Profiles form.

2 In the Header section, specify these fields:

User ID

Specify the user ID associated to the profile.

Profile ID

Specify a profile ID.

Default Profile

Select this check box to set this profile as the default profile for the user.

Profile Level

- **Public:** Select this option if the display settings are for all users who can access the **Service Schedules** form.
- **User:** Select this option if the display settings should only be available to the user currently logged in.

3 In the **Initial Display** section, specify these fields:

View

Select the type of view for the display.

Color Coding

Select the type of color coding for the display.

4 Specify the filters to use on the scheduling board:

Partner Filter Override

Select an override setting to determine which partners are displayed on the scheduling board:

- **On Tasks**: Shows only partners with appointments for the selected tasks.
- **Selected**: Shows all partners that have been selected in the Partner Filter even if they do not have appointments scheduled.

Tasks Filter Override

Select an override setting to determine which tasks are displayed on the scheduling board:

- **Selected**: Shows appointments for the selected tasks only.
- **All**: Shows all appointments for the applicable partners currently displayed.

Default Partner Filter

Select a user-defined default filter.

5 In the **Work Week** section, specify these fields:

Days Check Boxes

Select the days of the week to be considered when performing multi-day scheduling.

Work Start/End

Specify the starting and ending hours to determine the Work Week and Partner/Time views.

Break Start/End

Specify the starting and ending break times. These can be used in combination with color coding

6 In the **Multi-Day** section, specify these fields to use as default values, when creating a multi-day appointment, on the **Service Appointments** form:

Method

Select Finite to consider other schedule appointments when finding available hours.

Select Infinite to schedule appointments based on the partner's availability, without considering other appointments that already exist. This method has the potential to generate appointments that overlap.

Minimum Hours

Specify the minimum number of hours for which an appointment should be scheduled in one day.

Maximum Hours

Specify the maximum number of hours for which an appointment should be scheduled in one day.

7 In the **Display Settings** sections, specify these fields:

Refresh Interval

In minutes, specify how often the data refreshes on the **Service Schedules** form.

Appointment Labels

Click this button to launch the **Service Schedule Labels** form, on which the user can select which data appears when appointments are viewed on the scheduling board.

8 In the **Colors** section, specify the foreground and background colors for Calendar, Appointment, and Break Time.

Change

Click this button to select a color from the palette window.

Clear

Click this button to reset the color to the default setting.

9 Save the record.

Additional Filters

Use these buttons to specify additional filters:

- **SRO/Incident Status:** Click this button to launch the **Service Schedule ProfileFilters** form in Status Code mode. The status codes listed are pulled from the **Service Status Codes** form.

This list reflects codes that are added or removed from the **Service Status Code** master form. Selecting specific codes causes the scheduling board to only consider incidents and SROs of that status.

- **SRO/Incident Priority:** Click this button to launch the **Service Schedule Profile Filters** form in Priority Code mode. The priority codes listed are pulled from the **Service Priority Codes** form. This list reflects codes that are added or removed from the **Service Priority Codes** master form. Selecting specific codes causes the scheduling board to only consider incidents and SROs of that priority.
- **Appointment Status:** Click this button to launch the **Service Schedule Profile Filters** form in Appointment Status mode. The appointment statuses listed are pulled from the **Service Appointment Status Codes** form. This list reflects codes that are added or removed from the **Service Appointment Status Codes** master form. Selecting specific codes causes the scheduling board to only consider incidents and SROs of that appointment status.
- **Task Selection:** Click this button to launch the **Schedule Profiles Tasks Filters** modal form. The default values set on this form are Additional Filters of the **Task Selection** modal form.
- **To Be Scheduled:** Click this button to launch the **Schedule Profiles To Be Scheduled Filters** modal form. The default values set on this screen are Additional Filters of the **Task To Be Scheduled** modal form.

NOTE: If the filters are never accessed, it is assumed all data is returned.

Color Coding

Use the **Service Schedule Color Coding** form to associate colors with components on the **Service Schedules** form.

Follow these steps to set the color coding:

1. Launch the Service Schedule Color Coding form.
2. In the Color Coding field, select a component.
3. Click on the specific data line in the grid.
4. Click Change to set the background and foreground colors.
5. Click Clear to reset the background and foreground colors to the default settings.
6. Click Save to accept the changes.

Setting Service Schedule Permissions

On the **Service Schedule Permissions** form, you can set user access to scheduling forms.

1. Specify these fields on the form:

   User Name

   Select the user for whom you want to set permissions.

   Type

Select the type of permissions to set.

Partner/Department

Based on the type, select a partner or service department.

View

Select this check box to give the user permission to view appointments on the scheduling board.

Add

Select this check box to give the user permission to add appointments on the scheduling board

Update

Select this check box to give the user permission to update appointments on the scheduling board.

Delete

Select this check box to give the user permission to delete appointments on the scheduling board.

2 Save the record.

Running the Partner Schedule Report

Use the **Partner Schedule Report** to preview or print a partner schedule. Follow these steps to run the report:

1 Open the Partner Schedule Report.

2 Specify the range of values to include in the report:

- Schedule Date
- Partner ID
- Incident
- SRO

3 For the schedule date, select **Increment Date**, if appropriate.

4 Select the information you want to include in the report:

- Schedule Detail
- Customer Detail
- Schedule Notes
- Print Internal Notes
- Print External Notes
- Display Report Header

5 Select the reference type for the appointments to include in the output:

- Misc

- SRO
- Incident

6 Select whether to sort the output order by partner or by date.

7 Select **Page Break By Section** to use page breaks between like record types on the output.

8 Click **Preview** to preview the results before printing.

9 Click **Print** to generate and print the report.

Using the Partner Selection Form

When you are scheduling a task for a partner, you can use the filters on the **Partner Selection** modal form to determine which partners to schedule. Follow these steps to select a partner:

1 On the Service Schedules form, Schedule Appointments form, Dispatch Scheduling form, or Multi-Day Scheduling form, click Partner Selection to launch the Partner Selection modal form.

2 If you launched the form from the Service Schedules form, the Filter Override section has a default value based on the Service Schedule Profiles form.

3 The Select Partners To Be Displayed grid lists all the partners in the system. You can filter this list using the Additional Filters fields.

Click **Select All** to mark all the partners as selected.

Click **Deselect All** to clear all the partners from selection.

Click **Apply to Display** to apply the selections to the **Service Schedules** form.

You can set additional filters based on partner certifications, skills, and departments.

You can select the **Coverage** check box and assign values to narrow the partner list by territory.

4 Click **Apply Additional Filters to Partner List** to repopulate the list of partners.

5 Use the **Save Filter Type** field to determine what is saved.

- **Selected Partners**: When the partner filter is saved, only the specific partners listed are saved, thus creating a static partner list.

For example, if you set up a coverage filter for Country United States, the partner grid shows all partners stationed in the U.S. Choosing Selected Partners excludes any new partner added in the same territory.

- **Filters**: When the partner filter is saved, the Certifications, Skills, Departments, and Coverage, options are saved to allow the selection to be dynamic as information changes.

For example, if you set up a coverage filter for Country United States, the partner grid shows all partners stationed in the U.S. Choosing Filters includes any new partner added in the same territory.

6 The default **Filter Name** is the **Partners** value on the **Service Schedules** form. Click **Save** to save the Partner Selection settings to the default value. Or, click **Delete** to clear the Filter Name and specify a new name to be used in the **Partners** field on the **Service Schedules** form.

Using the Scheduling Board

Use the Scheduling board on the **Service Schedules** form to view and make appointments.

Follow these steps to use the Scheduling board:

1 Specify these fields to filter the Scheduling board:

View

Select the layout to use for displaying data on the **Service Schedules** form. This is a hardcoded list of supported displays.

Profile

Select a profile to control how and what is displayed. Profiles can be created and maintained on the **Service Schedule Profiles** form.

Partners

Select a filter method to control the partner information displayed.

Color Coding

Select a category to determine how the colors are displayed on the Scheduling board. Color coding is maintained on the **Service Schedule Color Coding** form.

2 Select dates on the calendar to view on the Scheduling board.

3 Click **Partner Selection** to launch the **Partner Selection** modal form.

4 Click **Task Selection** to launch the **Tasks Selection** modal form.

5 Use the **Partner Select** to reposition the Scheduling board for the selected partner.

6 Select these options from the **Actions** menu:

Add Single Day Appointment: Launch the **Service Appointments** form.

Add Multi Day Appointment: Launch the **Service Schedule Multi-Day** form.

Dispatch Partner: Launch the **Service Schedule Dispatch** form.

Quick SRO Create: Launch the **Service Order Quick Create** form.

Quick Incident Create: Launch the **Quick Incident Create** form.

Partner Selection: Launch the **Partner Schedule Report**.

Task Selection: Launch the **Task Selection** form.

Tasks To Be Scheduled: Launch the **Tasks Selection** form, filtered to show only tasks marked as To Be Scheduled.

Print Preview: Preview the output that is printed of the Scheduling board.

Print: Print the Scheduling board output.

Refresh Schedules: Refresh the Schedules collection and reapply the filters.

Reload System Data: Reload scheduling parameters and supporting data (department, certification, skills, and partners) that make up the filter lists.

7 Select these options from the **Setup** menu:

Display Profiles: Launch the **Service Schedule Profiles** form.

Color Coding: Launch the **Service Schedule Color Coding** form.

Scheduling Parameters: Launch the **Scheduling Parameters** form.

Right-Click Options

These options are available when you right-click on an appointment in the Scheduling board:

- **Reference:** Launch the maintenance form to which the appointment is related.
- **Copy Appointment:** Launch the **Service Appointments** defaulting the screen with data from the appointment selected to be copied.
- **Change Appointment Status:** Provides a list of valid appointment status options to which the current appointment will be changed.
- **MapPoint:** Provide various MapPoint functionality.
- **View Appointment By:** Launch the **Service Appointments** form prefilter by the right-click option chosen. Use this option to perform mass data updates and appointment rescheduling.

Tasks/Appointments Grid

On the **Tasks To Be Scheduled** tab of the grid, use these buttons:

- **Close:** Hide the grid. To redisplay the grid, click on the Tasks to be Scheduled tab at the bottom of the Scheduling board.
- **Edit Filter:** Launch the **Add Tasks** modal form.
- **Set Filter from Selected Appointment:** Change the filter on the grid to the same city, state, zip, county, country, and region as the selected appointment.
- **Select Additional Tasks:** Launch the **Select Additional Tasks** modal form.
- **MapPoint:** Export the locations to MapPoint for a visual view of the location of each task.
- **Refresh:** Reload the grid with data obeying the current filter values.

On the **Local Appointments** tab of the grid, use these buttons:

- **Close:** Hide the grid. To redisplay the grid, click on the Tasks to be Scheduled tab at the bottom.
- **Edit Filter:** Launch the **Scheduling Local Appointments Filter** modal form.
- **Set Filter from Selected Appointment:** Change the filter on the Local Appointments grid to the same city, state, zip, county, country, and region as the selected appointment.

- **Refresh:** Reload the grid with data obeying the current filter values.

Creating an Appointment Type

On the **Service Appointment Types** form, create codes to categorize appointments. Specify these fields:

Appointment Type

Specify a unique identifier assigned to the appointment type record.

Description

Specify an explanation of the appointment type record. This description will be used within service scheduling when the appointment type is used unless a description already exists from the incident or SRO.

Available To Schedule

Select this check box if the appointment type is allowed to be scheduled using service scheduling.

Need Substitute

Select this check box if the appointment type requires a substitute.

Maintaining Appointment Status Codes

Use the Service Appointment Status Codes form to maintain status codes used in service scheduling. Assign codes to schedule records to indicate the current status. Specify these fields on the form:

Appointment Status

Specify the identity of the appointment status code.

Closed

This field determines whether the appointment status code is an open or closed type. If the check box is selected and that status code is assigned to a schedule record, then it indicates to the user that the appointment has been completed.

Description

Specify a brief summary of what the appointment status code means.

Scheduling Method, Multi-Day vs. Single Day

You can schedule appointments for a single day or for multiple days.

Multi-Day

Use the **Service Schedule Multi-Day** form to schedule appointments for longer engagements that span beyond a single day. Multi-Day scheduling assists in finding available segments of time based on min/max hours per day, using either a finite or infinite scheduling methodology. Although the process is performed on a single form, multiple appointments are generated over the appropriate number of days. The system provides a preview before creating the multiple appointments.

Single Day

Use the **Service Appointments** form to schedule appointments for a single day.

Scheduling Single Day Appointments

Use the **Service Appointments** form to schedule a single day appointment for a partner. Follow these steps to schedule an appointment:

1 Specify these fields in the **Appointment Details** section:

Source

Select if the appointment is related to an incident, SRO, or a miscellaneous task.

Appointment Type

Select the type of appointment.

Appointment Status

Select the status of the appointment.

Partner

Select the partner to be dispatched.

Substitute

When needed, select an alternative partner.

Appointment Start

Select the date and time for the appointment to start.

Hours

Specify the duration of the appointment in hours.

Description

Specify a brief description of the appointment.

Originating Site

For multi-site systems, select the site in which the appointment was created.

2 Specify this information on the **Details** tab:

Subject

Specify a subject for the notes.

Notes

Specify information pertinent to the appointment.

Source Information

In this section, specify additional information related to the task.

3 The **Team Appointments** tab lists all appointments that are associated to the current appointment due to a partner team relationship.

- Click **Un-Link Appointment** to split a team member appointment off from the team, while preserving the original appointment.
- Click **Partner Selection** to launch the modal form, where you can select additional team members.

Buttons

Use the buttons on this form as described here:

- Click **History** to launch the **Appointment Status History** modal form.
- Click **View Reference** to launch the incident or SRO maintenance form related to the appointment reference.
- Click **View By Source** to launch a new **Service Appointments** form, displaying the referenced appointment information.
- Click **Reschedule Appointments** to launch the **Reschedule Appointments** form. This button is enabled when the **Service Appointments** form shows more than one appointment record.
- Click **Service Order Transactions** to launch the **Service Order Transactions** form.
- Click **Service Order Work Order Report** to launch the **Service Order Work Order Report** form.
- Click **SRO To Be Invoiced Report** to launch the **Service Order To Be Invoiced Report** form.
- Click **SRO Invoicing** to launch the **Service Order Invoicing** form.

Scheduling Multi-Day Appointments

Follow these steps to set up multi-day scheduling for a partner:

1 Launch the Service Schedule Multi-Day form.

2 Specify this information:

Source

Select the source of the work to be performed by the partner.

Partner

Select the partner for whom you want to set up the schedule.

Substitute

Specify the substitute partner to use if the assigned partner is not available.

Appointment Type

Select the type of appointment for the partner.

Appointment Status

Select the status of the appointment.

Appointment Start

Select the start date for the schedule.

Method

Select the method to use for assigning a partner to a task. Valid options are:

Method	Description
Finite	Starting from the start date and time entered on the Multi-Day Scheduling form, the scheduling engine will schedule the partner for a certain number of days into the future. The engine will not schedule the partner for more hours than they are available to work.
Infinite	Starting from the start date and time entered on the Multi-Day Scheduling form, the scheduling engine will schedule the partner for a certain number of days into the future. The engine will schedule the partner for more hours than they are available to work.

Hours

Specify the number of hours that a partner is to be scheduled for work on a particular task.

Minimum Hours Per Day

Specify the minimum amount of consecutive time that must be available before the task can be scheduled.

Maximum Hours Per Day

Specify the maximum amount of time to schedule in a day for the task.

Description

Specify a description of the work to be done.

3 In the Subject line, specify a subject for the note.

4 The Source Information group box shows this information derived from the source incident or SRO:

- Description
- Customer
- Ship To
- Priority
- Open Date
- Status
- SRO Type

5 Click the **Notes** button to launch the modal **Notes** form.

6 Click **View** to view a linked form filtered for the selected source.

7 Click **Preview** to view the proposed appointment schedule on the **Multi-Day Scheduling Preview** form.

8 Click **Cancel** if you want to close the form without saving.

Determining at What Level to Schedule

Use the **To Be Scheduled** field to identify incidents and service orders that need to be scheduled.

You can select this field at the Incident, SRO header, SRO line and SRO operation level, to give you flexibility in how you schedule partners. However, in most cases a company will choose to schedule at only one of these levels:

- **Incidents:** Schedule appointments at this level based on the initial call, when you need to send a partner to either evaluate the situation or provide a quotation.
- **SROs:** Schedule appointments at this level if you do not use incidents, or if you want to leave the incident available for troubleshooting within the call center and dispatch a partner only when needed.
- **SRO Lines:** Schedule appointments at this level if your company is asset based and wants to match partners to specific units that need to be serviced.
- **SRO Operations:** Schedule appointments at this level if there are multiple tasks on each service order that are performed by multiple people. If all of the operations are performed by the same partner, then use one of the higher levels to prevent too much data being presented to the dispatchers.

When you select this field, the **Task to be Scheduled** area of the **Service Schedules** form is populated with the applicable incidents, SROs, lines, and/or operations that can then be dragged and dropped onto the schedule board to assign a specific partner.

Setup Tip

Use the **To Be Scheduled** field on the **Service Parameters** form to set the default value of this field on the **Incidents** form. Use the **To Be Scheduled** field on the **SRO Templates** form to set the default value of this field for service orders.

Automatic Resource Scheduling

With Automatic Resource Scheduling, appointments are automatically created for a service order during a cross-reference from an incident or during automatic service order generation.

You might want to automatically create appointments for resources in these cases:

- When a service request originates as a direct result of a call center incident
- When service work for scheduled maintenance is needed

Automatic resource scheduling creates appointments at the SRO header level. If your company schedules appointments at the line or operation level, this feature might not be beneficial.

Setting Up the System

To use this feature, you must turn on automatic scheduling of resources and then set some default values:

1 In the **Service Parameters** form, select **Auto Schedule Resource.** Then specify default values for these fields:

Scheduling Method

Specify the Scheduling Method to assign to the new appointment.

Appointment Status

Specify the status to assign to the new appointment

Hours

Specify the default hours to set on the new appointment if the amount cannot be acquired from other sources (see below).

2 In the **Service Order Types** form, associate a Lead Time value with the type, so that the Start Date and Time assigned to the new appointment can be offset by a predetermined duration.

3 In the **Service Order Quick Create** form, use the **Start Date** field to change the defaulted SRO Start Date/Time, and thus the Start Date/Time of the appointment.

In this form, you can also clear the **Auto Dispatch SRO on Copy/Create** option to override the default value set on the **Service Parameters** form, for the SRO being created here. This option is only available if the feature is enabled on the **Service Parameters** form.

The automatically created appointment is displayed in the grid section of the Schedules tab on the Service Orders form.

Assigning a Resource

For SROs that are created from an incident or from Auto Generation, you can choose to automatically schedule appointments for the partner who is assigned to the task. To automatically assign a resource to the SRO, the system uses this hierarchy:

- If the SRO was created from an incident, use the incident owner.
- Otherwise, use the service partner listed in the SRO template (if not blank)
- If the service partner is blank in the template, then use the service partner for the unit (if not blank)
- If the service partner for the unit is empty, then use the service partner for the service customer.
- If no service partner is found in any of these areas, an error message is displays and auto scheduling is not performed.

Assigning Appointment Hours and Duration

To determine the appointment hours and duration that are automatically assigned, the system uses this hierarchy:

- Use the Duration value from the Units form is used (if not blank). This value is typically blank for SROs that are created from an incident.
- Otherwise, calculate the sum of the SRO Operation duration fields, if not zero. The duration value on the SRO is set from the SRO template.
- If neither of the above are available, use the sum of the planned labor hours worked, if not zero.
- Otherwise, use the Default Appointment Hours on the **Service Parameters** form.

Other Appointment Default Values

The default values used for the automatic appointment are listed here:

Appointment Field	Default Value
Reference	"SRO"
Reference Num	Number of the SRO
Appointment Status	Default from Service Parameters
Hours	See above
Method	Default from Service

	Parameters
Min Hours	Blank
Max Hours	Blank
Description	Description from SRO
Notes	Contents of first SRO note

Setting the Header Date Formats

When viewing the service appointments on the scheduling board in a mode that displays the date, you can set the format of the date on the **Service Parameters** form. During setup, you can choose between predefined formats or a custom option. The custom option supports carriage returns, allowing the scheduling board to display the header multiple rows high.

Schedules

When the View mode is set to Partner/Days, Work Week, or Partner Day/Time on the **Service Schedules** form, the header row shows a date. The date format can be controlled by a parameter on the **Service Schedule Parameters** form. You can choose from a list of pre-formatted values, or specify a custom format.

Scheduling Parameters

Use the **Header Date Format** field on the **Service Schedule Parameters** form to specify user-defined date headers. The lowercase **d** represents the day, the uppercase **M** represents the month, and lowercase **y** represents the year.

Use this syntax when you create a custom date format:

- Lower case **d** represents the day.
  - **d**: Shows the numeric day with no leading zeros.
  - **dd**: Shows the numeric day padding single digit values with a leading zero.
  - **ddd**: Shows the abbreviated day of the week.
  - **dddd**: Shows the full alphabetic day of the week.
- Upper case **M** represents the month:
  - **M**: Shows the numeric month value with no leading zeros.
  - **MM**: Shows the numeric month value with leading zeros.

  - **MMM**: Shows the first three alphabetic characters of the month.
  - **MMMM**: Shows the full alphabetic name of the month.

  NOTE: Be sure to capitalize the **M**, as a lowercase **m** is used to display the minute value when displaying time.
- Lowercase **y** represents the year:
  - **y** or **yy**: Shows the decade portion of the year.
  - **yyy** or **yyyy**: Shows the full numeric year value.

To have stack date information within the same header cell, press Enter when setting up the custom syntax. Literal values, such as slashes (/), colons (:), and semi-colons (;), can be used as separators.

The custom date format obeys the standard and custom Microsoft format syntax for Date/Time fields. For more details on this topic, see the online Microsoft MSDN library.

Example

This example of custom syntax displays January 1, 2013:

Custom Syntax	Display
MMM	Jan
ddd d	Fri 1
yyyy	2013

Scheduling and Rescheduling Linked Appointments

You can easily view, update, and move appointments grouped by reference, partner, and date. When an appointment that spans multiple days or appointments for teams is created, each appointment is implicitly linked to the others. Any change made to an individual appointment alerts the user of the other linked appointments that can be optionally altered as well.

Details

You can drill down from the Scheduling board on the **Service Schedules** form to the **Service Appointments** form to view groups of appointments at once by reference, partner, and type. Within each category, you can select appointments by a single date or by a date range. The single date option uses only appointments of the same date as the appointment selected. The date range option uses all appointments of the same category within the date range displayed on the Scheduling board.

NOTE: When the Scheduling board is in a Queue view, the date range option behaves the same as the single date option.

Alternatively, you can run the **Service Appointments** form and filter by date. The user has the ability to maintain Appointment data from this form.

Click **Reschedule Appointments** to move the appointments in bulk, change the partner, or change the status. The results of the Reschedule operation are presented on the **Service Appointments** form for review.

Reschedule Appointments

Three types of changes can be made that affect the records on the **Service Appointments** form:

- **Partner:** The selected partner is assigned to all appointments. If the lead appointment for the team is changed to a new team, all linked appointments are removed and added for the new team.
- **Appointment Status:** The selected appointment status is assigned to all appointments. If the status chosen signifies the appointment is close,' then each appointment is marked as complete.
- **Appointment Move:** The appointment date of all records is moved based on the **Move Appointments by At Least** value. If any appointments are scheduled to a team, each team member's appointments are also moved. If there is a resource conflict on one of the new dates, the planned substitute for the partner is used. The multi-day scheduling logic is leveraged for finding new available time slots.

Whether the finite or infinite scheduling method is chosen, the scheduling algorithm considers the working calendar so as to not move an appointment to a non-work day for the partner.

Rescheduling Appointments

Use the **Reschedule Appointments** form when you need to change an appointment scheduled for a partner. Information entered on this form affects all current appointments displayed on the **Service Appointments** form. You can perform mass data updates by assigning a new partner or appointment status.

1 Launch the Reschedule Appointments form by clicking Reschedule Appointments on the Service Appointments form.

2 Specify this information for the appointment:

Partner

Select a valid partner from the list if the intention is to change all appointments from their current partner to a new one.

Appointment Status

Select a valid appointment status from the list if the intention is to change all appointments from their current status to a new one.

Move Appointments by at Least

If you want to move all appointments by the same amount, specify a quantity of time in which to move them. Use this field to move a group of appointments.

3 The schedule method is displayed. The method can be infinite or finite.

4 Select **Use Partner Available Hours** if the rescheduling algorithm should observe the hours per day designated for the scheduled partner.

5 Select **Use Work End of Display Profiles** if the rescheduling algorithm should observe the work ends designated on display profiles to avoid after hours assignment.

6 Click **OK** to complete the rescheduling.

7 Click **Cancel** if you do not want to reschedule the appointment.

After clicking **OK**, the appointments in the main grid are marked as modified. You can review the changes prior to saving. If you do not save on the **Service Appointments** form, you can discard the changes.

Global Scheduling for Shared Partners

For companies that run a multi-site system, appointments created in one site can be viewed and maintained in a different site.

Scheduled Appointments

The **Service Appointments** form records the site in which the appointment was originally created. This way, the data replication is duplicated in the correct site.

Global Scheduling of Shared Partners Replication Category

The Global Scheduling of Shared Partners functionality can be utilized by companies that have multiple back office sites but one group of technicians who perform service work for both. This replication category is intended to replicate tables related to both Appointment and Partner. The replication rule interval should be set to **Transactional**.

NOTE: The appointment reference is not replicated. It is recommended that companies that require cross-site access to the appointment reference implement scheduling by incidents and configure the system for Global Incidents.

Because the Warehouse, Department, Work Code, and Misc Code values are optional for partner setup, they are not included in the Global Scheduling replication category. Companies that populate this information on the partner must take appropriate measures to ensure the data exists in both sites. This can be done by implementing manual data entry processes or by leveraging standard replication by creating a custom category referencing the tables to be replicated.

Incidents can be created for schedules to aid in Global Scheduling. Details about the appointment and the incident to which it is associated can be maintained globally when the appropriate replication categories are enabled.

Selecting Tasks to Display on the Scheduling Board

Use the **Task Selection** modal form to decide which tasks are displayed on the Scheduling board. Follow these steps to add tasks to the Scheduling board:

1. On the Service Schedules form, click Task Selection to launch the Task Selection form.
2. Specify these fields in the Selection Override section:

   Select Tasks

   Select this option to show only the tasks listed in the grid on the scheduling board when you click **Apply To Display**.

   All Tasks

   Select this option to show all scheduled tasks on the scheduling board when you click **Apply To Display**.

   NOTE: All fields are disabled and filters are reset after selecting this option.
3. Use these buttons in the **Select Tasks To Add** section:

   SRO Button

   Click this button to launch the **Select Additional Tasks** modal form, which allows the user to manually add service orders.

   Incident Button

   Click this button to launch the **Incidents** form in filter mode and return the current incident upon closing the form.

   Additional Filters Button

   Click this button to launch the **Add Tasks** modal form and add all incidents and SROs, down to the transaction level.

   Add All Button

   Click this button to add all incidents and SROs, down to the transaction level.
4. Select Include Misc Time to include any appointments set up as Miscellaneous.
5. Click **Apply To Display** to close the form, causing the Scheduling board to only show appointments listed in the task list grid.

Buttons

Use the buttons on this form as described here:

- Click **Remove Selected** to remove the selected line in the grid from the task list.
- Click **Remove All** to clear the grid.
- Click **MapPoint** to launch MapPoint applications.

Reviewing Appointment Status History

You can review the history of all changes to an appointment status, for example, to see when the appoint was scheduled and closed, or if it was ever on hold. To do this, drill down to an appointment on the **Service Schedules** form to display the **Service Appointments** detail form. Click **History** to display the **Service Appointment Status History** form. Whenever the appointment status code was changed, a snapshot of other information was stored, such as the start date, hours, partner, date of the change, and user. If a change was made from Service Management Mobile and GPS is enabled, the GPS location and date are also saved, so you can plot the location where the status was changed on a Microsoft MapPoint map.

Scheduling by Proximity

If you company deals with short, single day appointments, a technician might complete a task earlier than scheduled. Instead of sending them on to the next appointment, you might decide to dispatch them to an existing appointment in a nearby location.

Follow these steps to view appointments or tasks that are near another appointment or task:

1. On the **Service Schedules** form, highlight an appointment on the Scheduling board.
2. Right-click the appointment/task and select **Local Appointments** or **Local Tasks to be Scheduled**.
3. All appointments/tasks in a similar geographical location populate in a grid below the Scheduling board.
4. Click **Edit Filter** to broaden or narrow the list of appointments/tasks that are displayed.
5. Highlight the appointment/task in the grid that you want to dispatch.
6. Drag and drop the appointment/task onto the Scheduling board for the specific partner and time slot.

Whether the Appointments/Tasks tabs is hidden or visible is based on how you used it the last time within a specific Scheduling View. For example, you could set the Appointments/Tasks tabs to display when in Partner Day mode, but be hidden in Month View mode.

Local Appointments

This grid on the Scheduling board lists all appointments filtered by location (City, State, Zip Code). The grid lets you filter to view appointments by Partner and Service Type.

Tasks to be Scheduled

This grid on the Scheduling board lists tasks ready to be scheduled.

Scheduling Board Layout

A slide bar separates the Scheduling View from the Appointments/Tasks grid, to control how much of both views consume the window.

Profile Specific Appointment Defaults

In some companies, more than one user is responsible for the task of scheduling resources. Often, scheduling is segmented by the type of work being performed, and one default appointment status does not facilitate smooth work flow processes. Appointment fields on the scheduling profiles let you assign the default values at a user/profile level.

Display Profiles

You can assign an Appointment Type, Appointment Status, and Appointment Duration (in hours) for each profile configured for scheduling. Appointment type and status are user-definable code tables that can be maintained using the right-click **Details** button on this form. Any value set in each of these fields is pulled into the **Service Appointments** form, **Service Schedule Multi-Day** form, or the **Service Schedule Dispatch** form during appointment creation.

The system selects which scheduling profile to be used in the following order:

1. Default profile for the logged in user.
2. Any other profile for the logged in user.
3. Default profile for the public user.
4. Any other profile for the public user.

NOTE: The appointment default hours are only used if the duration of the incident/SRO operations (assuming the appointment is associated to an incident or SRO) are not populated. In other words, the duration calculation should behave as it did prior to this enhancement when the appointment references an SRO or incident.

Auto Dispatching

When an SRO is created from an incident (where the owner is populated) and the Auto Dispatch parameter is enabled, the appointment type and status are set from the public profile.

Service Management Mobile

The default values for appointment type, status, and hours within mobile are based on the values set on of the public default level.

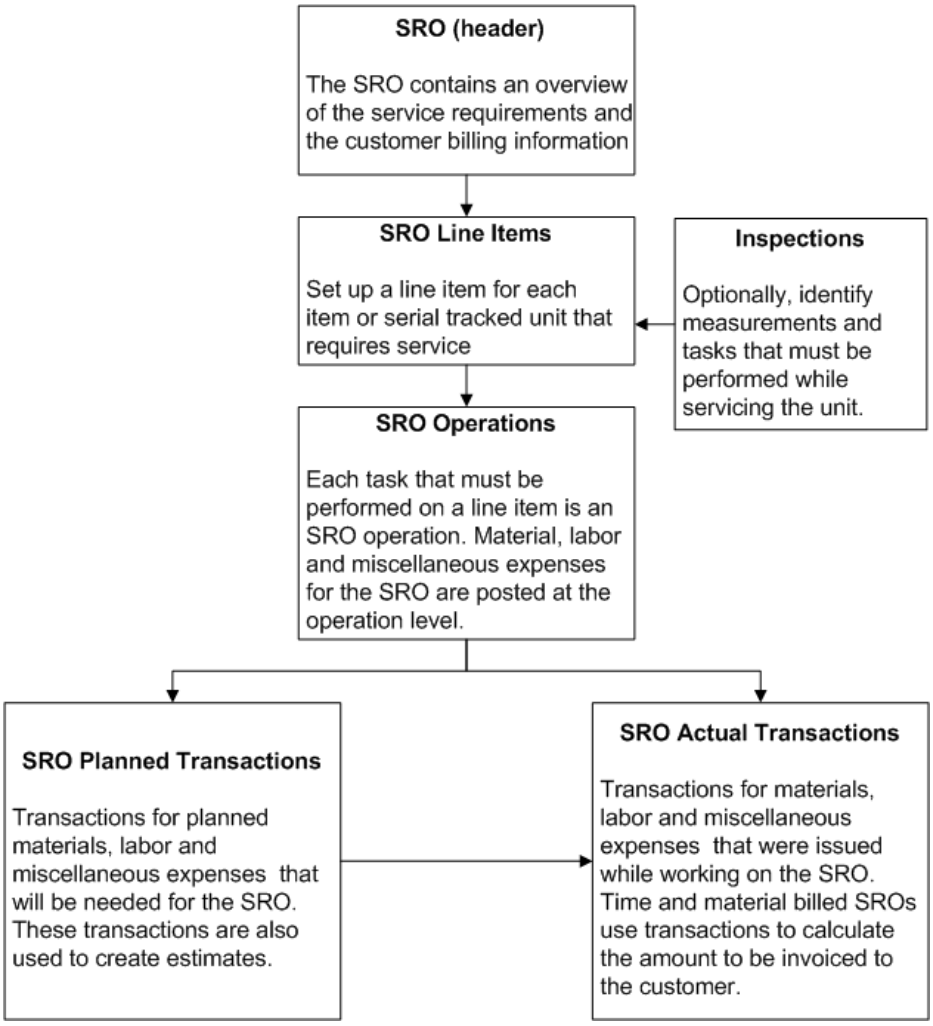
Service Request Orders (SROs)

Using SROs to Track Service Requests, Transactions, and Billing

When service work requires materials, labor, or other miscellaneous expenses, a Service Request Order (SRO) must be created. The SRO is used to track the expenses and to invoice the customer for any non-warranty related items. The SRO contains lines and operations that allow for many different types of service calls. For example, an SRO for a large item might have only one line item with multiple operations. Service orders on smaller items might have multiple line items with only a few operations.

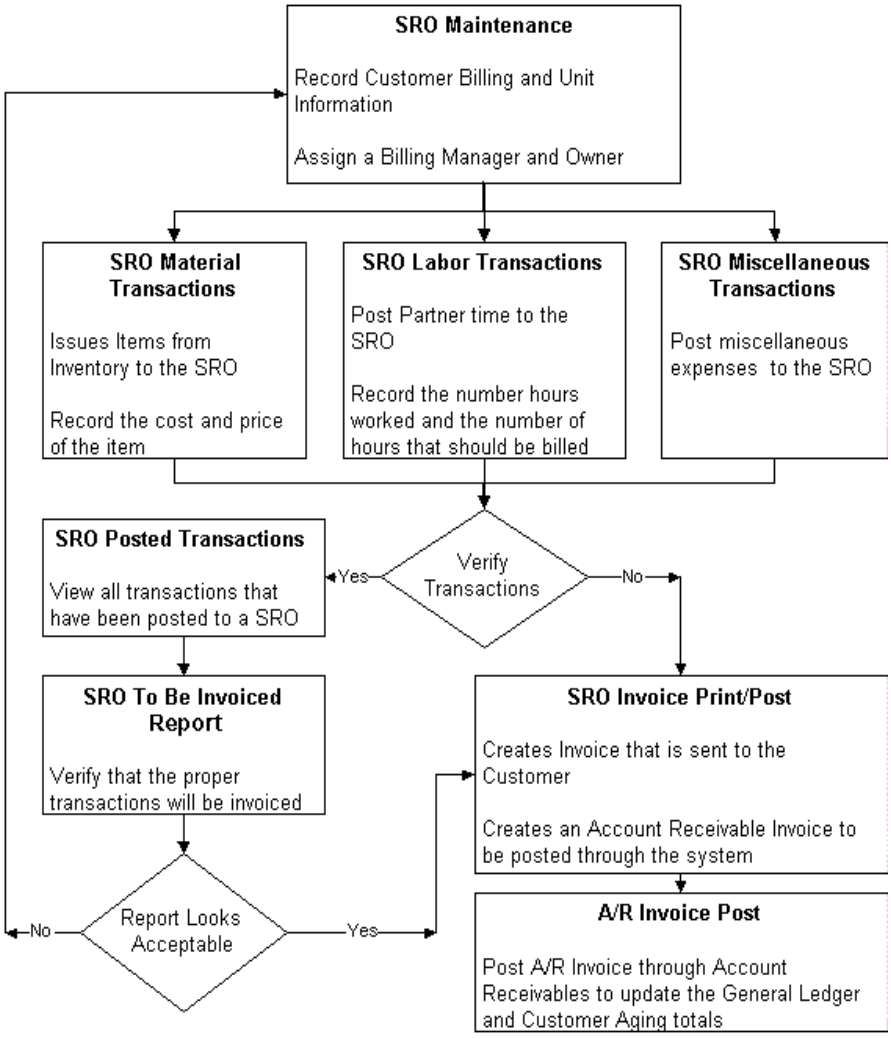
Structure

The structure of an SRO contains these elements:



Process Flow

This diagram shows a typical flow that could be used to add a Service Request Order (SROs) and then track it as service is performed and then billed to the customer.



Setting up SROs

Setting Up the System for Service Request Orders (SROs)

Before you can create SROs, set up this information:

1 Set up at least one SRO Product Code that lists the accounts used for posting expenses.

2 Set up Service Order Types for the different types of service calls your company performs.

3 Set up Work Codes.

4 Set up Service Operation Codes.

5 Set up Miscellaneous Codes.

6 Set up Payment Types.

7 Set up Service Order Templates, for certain types of service orders, so that information can default and not need to be typed when you create a new SRO for a certain type of service.

8 Set up Service Parameters (Service Orders 1 and 2 tabs)..

Setting Up SRO Product Codes and Distribution Accounts

Use the **Service Product Codes** form to create SRO product codes and set distribution accounts.

Follow these steps to set up a new product code:

1 Launch the Service Product Codes form.

NOTE: The fields on this form maintain General Ledger account numbers. The account numbers you enter must be valid account numbers in the **Chart of Accounts**.

2 In the header section, specify these fields:

Product Code

Specify a code to use to identify the group of items for which you want to display information.

Product Code Description

Specify a description for the new product code.

3 Set the accounts to which you want to assign costs for Work In Process, for a group of items identified by a product code. The system uses these account numbers during job material transactions, job labor transactions, and on entering a job into stock upon completion.

Specify these fields:

WIP Material Account

Select the account to use for posting work in process material for the product code.

WIP Labor Account

Select the account to use for posting Work In Process Labor for the product code.

WIP Fovhd Account

Select the account to use for posting Work in Process Fixed Overhead for the current product code.

WIP Vovhd Account

Select the account to use for posting Work in Process Variable Overhead for the current product code.

WIP Outside Account

Select the account to use for posting work in process outside services for the current product code.

4 Save the new record.

Setting Up Service Order Types

A service order can be categorized using SRO types, for example, Installation, Exchange, Rework, Standard Service, etc.

On the **Service Order Types** form, specify this information about each Service Request Order type:

1 Specify this information:

SRO Type and Description

Specify the service order type and description.

Product Code

Specify a product code to use for this SRO type. The product code lists all of the General Ledger accounts that are used for posting Material, Labor, and Miscellaneous expenses to a SRO. The product code also lists the accounts that are used by SRO Invoicing for posting Cost of Goods Sold and revenue amounts.

Warehouse

Specify the warehouse to use for this SRO type. Warehouses are set up on the **Warehouses** form.

2 Specify the Billing Code and **Billing Type**.

The billing type determines the total price for a service request order. Specify the billing type at the line or operation level of the SRO. A default value for billing type can be set on the **Service Parameters** form. Select one of these options:

- **Calculated/Time and Material:** Add all Material, Labor, and Miscellaneous items issued to calculate the price.
- **Project/Fixed:** Price is based on a manually entered, fixed amount.

3 Specify whether the **Labor, Material**, and **Miscellaneous Accounts** are assigned at the operation or transaction level.

4 Specify the **Discount Percentage** to be given if payment is made by the discount date.

5 Specify the number of **Exchange Days**. This value is used with the transaction exchange date to determine the expected service completion date.

6 Specify the **Lead Time**. This value determines what length of time is needed in order to prepare for the work to be performed on a maintenance SRO. When a service order is generated using the Automatic SRO utilities, the **Start Date** field on the **General** tab of the created SRO is affected by this value. The start date is calculated as the open date minus the specified lead time.

NOTE: The generation routine calculates length of time using the combination of the **Lead Time** and **Lead Time Type** fields.

7 Specify this information:

Accumulate WIP

Select this option if costs issued to the SRO are stored in WIP accounts. Otherwise, costs are posted directly to cost of goods (COGS) accounts.

Include Demand

Select this option if the material used for the SRO is considered in inventory calculations. This applies to actual, planned, and line material transactions at time of posting. These material transaction types are considered in the calculation:

- Inventory Issue
- Exchange Shipment
- Customer Shipment

Setting Up Work Codes

Work codes represent the type of work that is recorded to a Service Request Order.

On the **Work Codes** form, specify this information about each type of work:

1 Specify this information:

Work Code

Specify a unique alphanumeric code to represent the type of work that is recorded to a SRO.

Description

Specify an explanation for the type of work represented by the code. This description is used by default when selecting a work code on a form that also has a Description field.

2 Specify this information:

Cost

Specify an hourly expense to associate with the type of work.

Rate

Specify an hourly charge to associate with the type of work.

3 Specify these codes:

Cost Code

Select a cost code. Cost codes are used to classify project costs into categories. A cost code belongs to one of three cost classes:

- Material
- Labor

- Other

Cost codes are assigned to project transactions. These codes control which General Ledger accounts receive the transaction cost amount.

Cost Code Description

A description of the cost code is displayed.

Tax Code

Select a tax code, which represents how the sales tax is calculated. Selections are set up and maintained on the **Tax Codes** form.

Tax Code Description

A description of the tax code is displayed.

4 Specify the **Duration** of time for the type of work.

Setting Up Service Operation Codes

Operation codes are used to specify the type of work that the SRO operation represents.

On the **Service Operation Codes** form, specify an **Operation Code** for the type of work performed on an operation, and a **Description** of the code.

Setting Up Miscellaneous Codes

Miscellaneous codes are used to represent a particular type of expense that is charged to a SRO.

Specify these fields on the **Miscellaneous Codes** form:

1 Specify these fields in the **Header area**:

Misc Code

Specify a unique alphanumeric code to represent a particular type of expense that is charged to a SRO.

Project Cost Code

Select a project cost code. These codes are used to group project costs into labor, material, or other classes. The codes define which general ledger accounts are debited with specific project expenses. Use the codes to define whether overhead and G & A expenses and revenue should be calculated as a percentage of the costs.

Description

Specify an explanation of what the miscellaneous code represents. This description is used by default when selecting a miscellaneous code on a form that also has a Description field.

Default Price

Specify the default price for the code. This price is used when entering miscellaneous transactions against a SRO.

2 Specify these fields on the **General tab**:

Miscellaneous

Select the general ledger accounts to associate with the particular SRO miscellaneous expense.

Sales Discount

Select the general ledger accounts for any sales discount associated with the miscellaneous code.

Revenue

Select the general ledger accounts for posting of revenue.

3 On the **Warranty tab**, select the general ledger accounts to use for posting expenses to a SRO for a unit that is under warranty.

4 On the **CGS tab**, select the general ledger accounts to use for posting cost of goods sold expenses for SRO transactions.

5 Specify this field on the **Tax tab**:

Tax Code

Select the tax code that represents how the sales tax is calculated. Selections are set up and maintained through the **Tax Codes** form.

6 Save the record.

Setting Up Payment Types

Use payment types to determine how a transaction was paid and if the partner who created the transaction should be reimbursed.

To set up a payment type, specify these fields on the **Payment Types** form:

Payment Type

Specify a code for the payment type that is used.

Description

Specify a description for the type of payment.

Vendor

Select the vendor to use if the partner will not be reimbursed and a voucher needs to be created.

Reimburse Partner

Select this check box if the partner is to be reimbursed.

Setting Up Service Order Templates

Use service order templates to specify the type of work an SRO represents. You can build templates for handling different types of service calls. The templates include all the tools required to service a particular item. When a SRO is created by copying from a template, the information on the **Service Order Templates** form provides the default values for the SRO.

Follow these steps to set up a template using the **Service Order Templates** form:

1 Specify these fields in the **Header section**:

SRO

Select the unique alphanumeric used to identify the SRO.

Incident

Select the incident number. In some cases, the incident number is displayed.

Partial Billing

Select this check box if you want the SRO Invoice Print/Post program to bill an SRO or SRO transaction with a status of bill hold. If the check box is selected at the header level, the system ignores the entire SRO. If the check box is selected at the transaction level, only the transaction is ignored and all other transactions not on hold are invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Drop Ship To

Drop Ship

Bill Manager

SRO Type

Select the type of the service request order. These types are set up and maintained on the **Service Order Types** form.

Lead Partner

Select the partner responsible for the SRO.

Warehouse

Select the default warehouse to use for the SRO.

Department

Select the department out of which the partner works.

Destination

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank the system will create a new record of the destination type specified when the cross reference is performed.

Include Demand

Select this check box to include the material used for the SRO in inventory calculations.

These service order material transaction types are considered in the calculation:

- Inventory Issue
- Exchange Shipment
- Customer Shipment

Note: This applies to actual, planned, and line material transactions at time of posting.

To Be Scheduled

Select this check box to indicate that the current incident or SRO is to be included in the scheduling process for partner assignment. If selected, the incident or SRO is displayed on the **Service Schedules** form when you do select a task and click **All To Be Scheduled**. If cleared, the incident or SRO can still be manually scheduled but is not automatically displayed on the **Service Schedules** form.

2 Specify these fields on the **General tab**:

Product Code

Select the product code for the SRO. This code contains all of the General Ledger Accounts that are used for posting Material, Labor, and Miscellaneous expenses to a SRO. The product code also contains the accounts that are used by the SRO Invoicing program for posting Cost of Goods Sold and Revenue amounts.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Region

When a new SRO record is created, the region defaults based on the region assigned to the selected service customer. If a line is added to the SRO for a unit with a region specified, then the region on the service order will be changed to match that of the unit.

Remote ID

Specify the ID for the item at the remote site (may be different than the ID for the same item at the local site). Leave this field blank if the item ID is the same at both sites.

Projected Date

Select the date that you expect the service order to be completed.

Get CTP Button

Click this button to estimate the date by which your resources can actually complete the order, considering their availability.

End Date

The date and time that work was completed is displayed.

Priority Code

Select the priority code for the service order.

Working Status

Specify a user-defined name to signify the service status code.

History Button

Click this button to launch the **Service Order Working Status History** form.

Shift ID

Select a valid shift from the drop-down list. The resource will be available for work during the intervals specified on this shift. You can set up shift intervals on the **Scheduling Shifts** form.

If you do not assign a shift to the resource, the resource is considered available 24 hours per day, 7 days per week.

Duration

Specify the length of down time for the maintenance.

Schedule Down Time

Select this check box to schedule down time when creating SROs of this type.

3 Specify these fields on the **Billing tab**:

Freight

Specify the amount of freight charges to be invoiced.

Currency

The type of currency to be used for the SRO is displayed. The default value is based on the SRO customer. The values are set up and maintained using the **Currency Codes** form.

Misc Charges

Specify any miscellaneous charges associated with the SRO.

Discount Fields

Specify the discount percentage to be given if payment is made by the discount date.

Total Price

The running total of price for the SRO, SRO Line, or SRO Operation excluding freight, miscellaneous, and tax charges is displayed.

Total Cost

The accumulated total cost amount for the SRO Line or SRO Operation is displayed.

Sales Amount

Specify the base total to be charged (minus additional fees such as taxes, freight, surcharges etc.)

Auto Close SRO After Invoicing

Select this check box to set the SRO status to "Closed" when invoicing is complete (regardless of the Close Date value).

NOTE: If this field is not checked, manually populating the "Close Date" field of the SRO will cause it to close after invoicing.

The Service Order field value will default from the Template if created via SRO Template and if not, from the Service Parameters.

SRO Invoice Listing Button

Click this button to launch the **Service Order Invoice Listing** form.

Set Oper Stat to Invoice Button

Click this button to set the service order operation status to invoice.

SRO To Be Invoiced Report Button

Click this button to launch the **Service Order To Be Invoiced Report**, filtered for the current SRO.

SRO Invoicing Button

Click this button to launch the **Service Order Invoicing** form, filtered for the current SRO.

Credit Hold

Select this check box to put the SRO customer on credit hold. If selected, no invoicing is allowed for that SRO.

Reason

Select the reason for the credit hold. This value is required to execute the credit hold. The selections available are set up and maintained through the **Credit Hold Reason Codes** form.

Credit Hold Date

Select the date that the SRO was placed on credit hold. The current system date is used by default upon checking the Credit Hold field.

User

Select the user that placed the SRO on credit hold. The current user name is used when **Credit Hold** is selected.

4 Specify these fields on the **Deposits tab**:

Total Deposit Required

Specify the total amount of down payment required from the customer.

Deposit Received

The accumulated deposit amount received from the customer is displayed.

Deposit Due

The amount outstanding for the total deposit on the SRO is displayed.

Deposit Required

Select this check box to prevent any material, labor, or miscellaneous transactions from being posted to the SRO until the deposit due is equal to zero.

Deposit Applied

The deposit amount that has been applied to the SRO is displayed.

Deposit Remaining

The outstanding deposit amount for the SRO is displayed.

Deposit Expiration

Select the date that the customer deposit needs to be received by.

Apply Open Deposits

Select this check box to apply deposits from the customer that are not directly tied to a particular SRO to the current SRO.

Deposits Button

Click this button to launch the **Order Deposits** form.

5 Specify these fields on the **Line Defaults tab**:

Billing Type

The billing type determines the total price for a service request order. Specify the billing type at the line or operation level of the SRO. A default value for billing type can be set on the **Service Parameters** form. Select one of these options:

- **Calculated/Time and Material:** Add all Material, Labor, and Miscellaneous items issued to calculate the price.
- **Project/Fixed:** Price is based on a manually entered, fixed amount.

Material Account Location

Specify whether the accounts used for material will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Labor Account Location

Specify whether the accounts used for labor will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Misc Account Location

Specify whether the accounts used for miscellaneous issues will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Billing Code

Planned Transaction Required

Select this check box if a planned transaction must exist before the line or operation can be invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Accumulate WIP

Select this check box to store costs issued to the SRO in WIP accounts.

NOTE: A default value for new SROs can be set on the Service Order tab of the Service Parameters form.

Use Planned Pricing

Select this check box to use planned pricing instead of pricing based on partner, codes, and customer.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Extend Qty On Matl Trans

Use this check box to multiply out transaction quantities by the quantity being copied or created for a SRO. For example, the quantity is 2 on the transaction and I'm on the **Service Order Quick Create** form and I put in the quantity of 5. If the flag is checked, then the transaction would end up with a quantity of 10 (5x2). Without the extend quantity flag, the transaction would copy in as 2 since that's what it was originally.

Extend Qty On Labor Trans

Use this check box to multiply out transaction quantities by the quantity being copied or created for a SRO. For example, the quantity is 2 on the transaction and I'm on the **Service Order Quick Create** form and I put in the quantity of 5. If the flag is checked, then the transaction would end up with a quantity of 10 (5x2). Without the extend quantity flag, the transaction would copy in as 2 since that's what it was originally.

Extend Qty On Misc Trans

Use this check box to multiply out transaction quantities by the quantity being copied or created for a SRO. For example, the quantity is 2 on the transaction and I'm on the **Service Order Quick Create** form and I put in the quantity of 5. If the flag is checked, then the transaction would end up with a quantity of 10 (5x2). Without the extend quantity flag, the transaction would copy in as 2 since that's what it was originally.

6 Use these buttons on the **Lines/Operations tab**:

Transactions Button

Click this button to launch the **Service Order Transactions** form.

Lines Button

Click this button to launch the **Service Order Lines** form.

Operations Button

Click this button to launch the **Service Order Operations** form.

The grids show line and operation information for the SRO.

7 Specify these fields on the **Notes tab**:

Subject

Specify a brief summary of the note record.

The subject grid shows all the existing note records for the SRO. Clicking the left side of the grid area below any existing note adds the next sequence number and allows for entry of an additional note record defaulting with the information described above.

Internal

Select this check box to specify that the notes are internal.

Notes

Specify any notes pertaining to the currently selected record.

8 Save the template.

Buttons

- Click **Quick Create** to launch the **Service Order Quick Create** form, filtered for the current SRO.
- Click **SRO Lines** to launch the **Service Order Lines** form.
- Click **SRO Operations** to launch the **Service Order Operations** form, filtered for the current SRO.
- Click **SRO Transactions** to launch the **Service Order Transactions** form, filtered for the current SRO.
- Schedule
- Click **Copy Lines** to launch the **Service Order Lines** form, filtered for the current SRO.
- Click **SRO Work Order Report** to launch the **Service Order Work Order Report**.
- Click **Pay With Credit Card** to open the Credit Card Interface Parameters form.

  This button is displayed only if all of these requirements are met:

  - You are a licensed user of the Credit Card Interface, and the interface is enabled for this site.
  - On the **POS Setup** form, a payment type is defined with the Transaction Type set to Credit Card.
  - **Use Credit Card Interface** is selected for that payment type on the **Point of Sale Setup** form.
  - You select that payment type on the **Point of Sale Payment** form.

Adding and Maintaining SROs

Setting Up Service Parameters

See Setting Up Service Parameters (Infor CloudSuite) on page 8.

Adding and Updating a Service Order

Service orders collect all of the costs required to perform the service and can contain multiple lines and multiple operations.

Service request orders can be created in several ways:

- From the Call Center (**Incidents** form) by cross-referencing an incident or an event.
- From the **Service Contracts** form for an item that is on planned maintenance
- Copied from a template (**Service Order Templates** form)
- Directly from the **Service Orders** form

In the first 3 cases, some information defaults into the **Service Orders** form from the other form.

Steps

To maintain information on the **Service Orders** form:

1 On the **SRO header**, specify this information:

SRO

Select the unique alphanumeric used to identify the SRO. Leave this field blank to let the system auto-generate a value.

Incident

Select the incident number.

Status

Select the status of the SRO. The status determines whether the transactions against the SRO may be entered or invoiced. The status may be changed at any time. Choices for the status are:

- **Template**: Used as a generic setup for quickly creating new SROs.
- **Estimate**: Used for estimating cost and price information for a customer.
- **Open**: Indicates that no transactions are on hold and that the SRO may be invoiced. When first created, the status will automatically set to open.
- **Closed**: SRO is complete and no invoicing can be performed.

Bill Status

The current state of billing for a SRO is displayed.

Partial Billing

Select this check box if you want the SRO Invoice Print/Post program to bill an SRO or SRO transaction with a status of bill hold. If the check box is selected at the header level, the system ignores the entire SRO. If the check box is selected at the transaction level, only the transaction is ignored and all other transactions not on hold are invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Customer

Select a customer.

Ship To

The Customer Ship To location is displayed.

Drop Ship To

Drop Ship Button

Click this button to launch the **SRO Drop Ship To** form.

SRO Type

Select he type of the service request order. These types are set up and maintained on the **Service Order Types** form.

Select the end user type for the service order.

Warehouse

Select the default warehouse to use for the SRO.

Lead Partner

Select the partner responsible for the SRO.

Include Demand

Select this check box to include the material used for the SRO in inventory demand calculations.

These service order material transaction types are considered in the calculation:

- Inventory Issue
- Exchange Shipment
- Customer Shipment

Note: This applies to actual, planned, and line material transactions at time of posting.

To Be Scheduled

Select this check box to indicate that the current incident or SRO is to be included in the scheduling process for partner assignment. If selected, the incident or SRO is displayed on the **Service Schedules** form when you do select a task and click **All To Be Scheduled**. If cleared, the incident or SRO can still be manually scheduled but is not automatically displayed on the **Service Schedules** form.

Salesperson

Select the salesperson associated with the SRO or contract.

Price Code

Select the price code for this customer.

Awaiting Parts

Select this check box if the Incident or SRO is dependent on material that is yet to be received. Whether this field is enabled or disabled to the user is controlled by the Parts Fulfillment mode assigned at the Service Parameters level.

Terms Code

Select the terms code for this customer.

The terms code is used to identify specific billing terms that apply to this customer or this order. This value displays as the default when you enter invoice and debit transactions. The terms code is used when determining the transaction due date and the discount information. The code entered here must be in the terms code file.

Ship Via

Specify the ship via code to use for this SRO. The ship via code is used to identify the preferred shipping method of the customer. The default value is based on the customer selected but can be overwritten. The codes are set up and maintained on the **Ship Via Codes** form.

Cust PO

Select the customer PO that is associated with the service order.

Department

Select the department out of which the partner works.

Destination

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank the system creates a new record of the destination type specified when the cross reference is performed.

2 On the **General** tab, specify this information:

Product Code

Select the product code for the SRO. This code contains all of the General Ledger Accounts that are used for posting Material, Labor, and Miscellaneous expenses to a SRO. The product code also contains the accounts that are used by the SRO Invoicing program for posting Cost of Goods Sold and Revenue amounts.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Region

When a new SRO record is created, the default region is based on the region assigned to the selected service customer. If a line is added to the SRO for a unit with a region specified, then the region on the service order is changed to match that of the unit.

Remote ID

If the order was created remotely, the ID is displayed.

Projected Date

Select an estimated date for when the order will be completed.

Get CTP Button

Click this button to use information from the APS planning engine to calculate the estimated date.

Open Date

The date and time that the SRO or SRO operation was opened is displayed. The current system time upon starting a new SRO or line is used as the default time.

Start Date

The date of entry into the system or when work commenced on the associated task is displayed.

Close Date

Select the date and time that the SRO or SRO line was closed. The field will default in the current system time upon closure of the SRO or line.

End Date

The date and time that work was completed is displayed.

Priority Code

Select the priority code for the service order.

Working Status

Specify a user-defined name to signify the service status code.

Maintenance Date

Specify the date and time that maintenance is scheduled to occur. Updating of this field will update the related machine maintenance record.

Maintenance Duration

Specify the length of down time for the maintenance.

Inspection Finalized

The date all the inspection tasks of the SRO were finalized is displayed.

Finalize Inspection Button

Click this button to check each SRO Line Inspection to verify a measured value has been entered for required inspection tasks.

Shift ID

Select a valid shift from the drop-down list. The resource will be available for work during the intervals specified on this shift. You can set up shift intervals on the **Scheduling Shifts** form.

If you do not assign a shift to the resource, the resource is considered available 24 hours per day, 7 days per week.

Schedule Down Time

Select this check box if a Shift Exception should be created for the the Maintenance Duration associated with the service order.

Click **History** to launch the **Service Order Working Status History** form.

3 On the **Customer** tab, specify this information:

Customer

The customer is displayed.

Ship To

The Customer Ship To location is displayed.

Drop Ship Button

Click this button to launch the **SRO Drop Ship To** form.

Consumer

Select a consumer. A consumer is the end user or recipient of a unit. Even though a unit may have been sold to one customer, it may have been distributed to another customer. That "other" customer is the consumer.

Consumer Ship To

The Consumer Ship To location. If the field is left blank, the zero ship to location is the default value.

4 Specify the name of the contact person and related contact information.

5 On the **Billing** tab, specify this information:

Freight

Specify the amount of freight charges to be invoiced.

Misc Charges

Specify any miscellaneous charges associated with the SRO.

Discount Percent

Specify the discount percentage to be given if payment is made by the discount date.

Currency

The type of currency to be used for the SRO is displayed. The default value is based on the SRO customer. The values are set up and maintained using the Currency Codes form.

Fixed Rate

Select this check box if you want to set a fixed exchange rate for calculating the invoice amount that does not change over time. If cleared, the exchange rate is acquired from the Currency Code and Currency Rates.

Exchange Rate

Specify the multiple used to calculate the conversion from one currency to another.

Material Cost

The running total of material costs issued to the SRO, SRO Line, SRO Operation, or SRO Transaction is displayed.

Labor Cost

The running total of labor costs issued to the SRO, SRO Line, or SRO Transaction is displayed.

Miscellaneous Cost

The running total of miscellaneous costs issued to the SRO, SRO Line, SRO Operation, or SRO Transaction is displayed.

Total Cost

The accumulated total cost amount for the SRO Line or SRO Operation is displayed.

Total Price

The running total of price for the SRO, SRO Line, or SRO Operation excluding freight, miscellaneous, and tax charges is displayed.

Auto Close SRO After Invoicing

Select this check box to set the SRO status to "Closed" when invoicing is complete (regardless of the Close Date value).

NOTE: If this field is not checked, manually populating the "Close Date" field of the SRO will cause it to close after invoicing.

The Service Order field value will default from the Template if created via SRO Template and if not, from the Service Parameters.

Total Billed

The running total of invoiced charges for the SRO, SRO Line, or SRO Operation including freight, miscellaneous, and tax amounts is displayed.

Accum Freight

Displays the total freight charges that have been invoiced for the SRO.

Accum Misc Chgs

Displays the total miscellaneous charges that have been invoiced for the SRO.

Accum Discount

Displays the total discount amount that has been invoiced for the SRO.

Sales Tax

The total sales tax charges that have been invoiced for the SRO is displayed.

Total Sales Tax2

The total sales tax 2 charges that have been invoiced for the SRO is displayed.

Sales Amount

Specify the base total to be charged (minus additional fees such as taxes, freight, surcharges etc.)

Credit Hold

Select this check box to put the SRO customer on credit hold. If selected, no invoicing is allowed for that SRO.

Reason

Select the reason for the credit hold. This value is required to execute the credit hold. The selections available are set up and maintained through the **Credit Hold Reason Codes** form.

Credit Hold Date

Select the date that the SRO was placed on credit hold. The current system date is used by default upon checking the Credit Hold field.

User

Select the name of the user that placed the SRO on credit hold. If you select the **Credit Hold** check box, the current user is the default value.

Set Oper Stat to Invoice Button

Click this button to set the selected SRO operation status to Invoice.

Orders to be Invoiced Report Button

Click this button to launch the **SRO To Be Invoiced** form, filtered for the current SRO.

Order Invoicing Button

Click this button to launch the **Service Order Invoicing** form, filtered for the current SRO.

6 On the **Deposits** tab, specify and view information about the deposit totals:

Total Deposit Required

Specify the total amount of down payment required from the customer.

Deposit Received

The accumulated deposit amount received from the customer is displayed.

Deposit Due

The amount outstanding for the total deposit on the SRO is displayed.

Deposit Applied

The deposit amount that has been applied to the SRO is displayed.

Deposit Remaining

The outstanding deposit amount for the SRO is displayed.

Deposit Expiration

Select the date that the customer deposit needs to be received by.

Deposit Required

Select this check box to prevent any material, labor, or miscellaneous transactions from being posted to the SRO until the deposit due is equal to zero.

Apply Open Deposits

Select this check box to apply deposits from the customer that are not directly tied to a particular SRO to the current SRO.

Deposits Button

Click this button to launch the **Order Deposits** form.

7 On the **Line Defaults** tab, specify this information:

Billing Type

The billing type determines the total price for a service request order. Specify the billing type at the line or operation level of the SRO. A default value for billing type can be set on the **Service Parameters** form. Select one of these options:

- **Calculated/Time and Material:** Add all Material, Labor, and Miscellaneous items issued to calculate the price.
- **Project/Fixed:** Price is based on a manually entered, fixed amount.

Material Acct Location

Specify whether the accounts used for material will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Labor Acct Location

Specify whether the accounts used for labor will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Misc Acct Location

Specify whether the accounts used for miscellaneous issues will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Billing Code

Bill Manager

Specify the identification of the person responsible for verifying that the SRO is properly invoiced.

Planned Transaction Required

Select this check box if a planned transaction must exist before the line or operation can be invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Accumulate WIP

Select to determine if costs issued to the SRO are stored in WIP accounts or if the costs should be posted directly to cost of goods (COGS) accounts.

NOTE: A default value for new SROs can be set on the Service Order tab of the Service Parameters form.

Use Planned Pricing

Select this check box to use planned pricing instead of pricing based on partner, codes, and customer.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

8 On the **Tax** tab, specify this information:

Tax Code

Select the tax code, which represents how the sales tax is calculated. Selections are set up and maintained through the **Tax Codes** form.

Freight Tax Code

Select the code representing how much sales tax will be assessed on freight charges.

Misc Code

Select the code representing how much sales tax will be assessed on miscellaneous charges.

NOTC

Select the nature of transaction code. These codes are used in the European Community to identify the characteristics of various transactions used in the system. Selections are set up and maintained using the **Nature of Transaction Codes** form.

Delivery Terms

Select a code for the terms of delivery.

Process Indicator

Specify the process indicator code. This code is used by the system in calculating the EC Sales List Report for companies in European Community countries. The Activate EC Reporting option on the General tab of the **General Parameters** form must be set to true in order for this field to be used.

9 On the **Schedule** tab, you can view information about partner schedules related to this SRO, which are defined through Schedule Appointments:

Schedule Button

Click this button to launch the Service Scheduler.

Dispatch Button

Click this button to launch the **Service Schedule Dispatch** form.

10 On the **Lines/Operations** tab, you can view line and operation information for this SRO, which is defined using the Lines and Operations buttons:

Transactions Button

Click this button to launch the **Service Order Transactions** form.

Lines Button

Click this button to launch the **Service Order Lines** form.

Operations Button

Click this button to launch the **Service Order Operations** form.

11 On the **Notes** tab, you can view and update notes about the SRO:

Subject

Specify a brief summary of the note record.

The subject grid shows all the existing note records for the SRO. Clicking the left side of the grid area below any existing note adds the next sequence number and allows for entry of an additional note record defaulting with the information described above.

Notes

Specify any notes pertaining to the currently selected record.

Internal

Select this check box to specify that the notes are internal.

12 On the **User Defined** tab, you can place UETs and other custom fields.

- Project Owner
- Architect
- Percent of Stored Materials
- Percent of Completed Work

Next Steps

After you create the service order, you can update it using these buttons:

- Click **Quick Create** to create a new SRO based on information in the current SRO.
- Click **Copy Lines** to launch the **Service Order Quick Create**.
- Click **SRO Lines** to add and update service order lines.
- Click **SRO Operations** to add and update operations.

- Click **SRO Transactions** to add and update labor, material, and miscellaneous transactions against this order.
- Click **Schedule** to schedule appointments against the order.
- Click **SRO Work Order Report** to print transaction information for the SRO.
- Click **Signature** to display any captured electronic signatures related to the SRO.
- Click **Pay with Credit Card** to launch the **Credit Card Payments** form, populated with the customer information of the SRO.
- To invoice the customer, follow the steps in Invoicing Customers for Service Work.

Other Ways to Use the Service Orders Form

Alternatively, you can create SROs using these buttons:

- Click **Copy Lines** to copy the lines from the current SRO to a new SRO.

Service Order Quick Create: Copying SRO Information from an Existing SRO

You can quickly specify a simple list of information to create a Service Request Order or copy it from an existing SRO or template. The system then builds the SRO structure from the specified template, unit, and customer.

Use the **Service Order Quick Create** form, accessed from a button on the Service Orders or Service Console forms, to do this.

Quickly Creating a Simple SRO

On the "Copy To" side of the **Service Order Quick Create** form, just specify the Customer Number, Ship To, and Unit Substitute fields to quickly create an SRO structure. Then click **OK** to display the new SRO in the **Service Orders** form.

Copying an SRO To/From an Existing SRO or Template

1 Specify this information about the SRO or template you are copying from, in the Copy From area of the form:

Copy From SRO

Select the SRO you want to copy to make the new SRO.

Only Show Templates

Select this check box to limit the selections available to only include SRO templates.

Keep Line Numbers

Select this check box to create the line numbers as they appear on the SRO from which they are copied. The line numbers will not be re-sequenced. Clear this check box to re-sequence the line numbers, starting with the number one and incrementing by one.

Keep Operation Numbers

When the maintenance is set up on the **Units** form, a SRO Template is selected for creating the service order. Select this check box to use the operation numbers as they appear on the SRO Template. Clear this check box to re-sequence the numbers to the standard operation sequencing of 10, 20, 30, and so on.

Use SRO Whse

Select this check box to assign the value from the new service order (General tab, Warehouse field) to the operation(s) and any transaction(s) being copied. This replaces the warehouse value as it was set on the original operation or transaction. If this check box is cleared, then the warehouse value of the operation and transaction keeps the value from the original SRO.

Auto Schedule Resource

Select this check box to automatically create an appointment for the SRO. The appointment is displayed in the grid section of the Schedules tab on the **Service Orders** form when this functionality is enabled.

Available Operations Grid

This grid shows the operations associated with the selected SRO that are available for inclusion in the copy or creation utility. Use the arrow buttons for moving operations between this area and the Operations to Include area.

Copy Transactions From

Select which transactions to copy from the selected SRO operations. Valid options are:

- **Planned:** Copy the planned transactions from the source SRO.
- **Actual:** Copy the actual transactions from the source SRO to planned transactions of the target SRO.
- **None:** Do not copy any transaction from the source SRO.

Copy Line Transactions

Select this check box to copy the line transactions.

2 Use the arrow buttons to move specific lines or operations back and forth between the "From" area to the "To" area.

NOTE: When you copy across database sites, all lines and operations are copied. You cannot select specific lines or operations.

3 Specify this information about the SRO you are copying to, in the Copy To area of the form:

Customer

Select a customer for the new SRO.

Ship To

Select a customer ship to location. If the field is left blank, the zero ship to location is the default value.

Start Date

The date specified is assigned to the SRO and Operation Start Date/Time. If the Automatic Resource Scheduling functionality is turned on, this value is also used as the start date/time of the scheduled appointment. The Start Date will default to the current system date and time, and will be pushed out by the lead time (if specified) of the SRO Type.

Lead Partner

Select the lead partner for the SRO.

Unit Substitute

Select a unit to replace the one being copied from the selected SRO Line.

Item Substitute

Select an item to replace the one being copied from the selected SRO Line.

Qty

Specify the number or amount of units/items to use on the transaction, order, etc.

UM

Select the unit of measure for the item.

Show All Operations

This check box works in conjunction with the item substitute fields on the form. If one of those fields is specified, the utility only shows operations that match the item selected. But if this check box is selected, then the matching functionality is overridden and all the operations from the selected SRO are displayed.

Operations To Include Grid

This grid shows the operations associated with the SRO that are available for inclusion in the copy or creation utility.

Copy Transactions To

Select which transaction type to create on the new service order. Valid options are:

- **Planned:** The transactions from the source SRO are created as planned transactions on the new SRO.
- **Actual:** The transactions from the source SRO are created as actual transactions on the new SRO.
- **None:** Do not copy any transaction from the source SRO to the newly created SRO.

Comp Item Substitute

Select an item to replace the item on the material transaction of the operation being copied from the existing SRO.

Comp Qty

Specify the number or amount of units/items to be used on transaction, order, etc.

4 Click **OK** to save the changes and create the new SRO, or click **Cancel** to cancel the process.

Copying a Line from an Existing SRO

Click **Copy Lines** on the **Service Orders** form to open the **Service Order Quick Create** form and quickly copy a line from the displayed SRO to another SRO.

Automatically Generating a Service Order

Use the **Service Order Automatic Generation Utility** to process the specified units and automatically generate a SRO if needed.

When **Auto Schedule Resource** is selected on the **Service Parameters** form, then an appointment is created for each maintenance SRO. These values are used to create the appointment:

Partner

- The default partner specified on the **Service Order Templates**.
- The service partner of the unit specified.
- The service partner of the customer specified.

Appointment Date:

- The appointment date/time will be set to the start date/time entered on the Copy/Create form.

Duration

- The Down Time value assigned on Unit Maintenance record
- The sum of the SRO Operations duration
- The sum of the hours worked on the planned labor transactions
- The service parameter "hours" value

To automatically generate a service order:

1 Specify this information:

Unit

Select the range of units to include for the utility.

SRO Type

Select the range of SRO types to include for the utility.

Dept

Select the range of departments to include for the utility.

Work Center

Select the range of work centers to include for the utility.

Through Date

Specify the date through which the SROs should be automatically generated.

Increment Date

Select this field to automatically increment date ranges.

Keep Operation Numbers

Select this check box to use operation numbers as they appear on the SRO template. If not selected, the numbers are re-sequenced in increments of ten.

2 Click **Preview** to preview the output before running the utility.

3 Click **Process** to run the utility.

4 Click **Commit** to save the results.

Collecting SRO Material Data

Use the **Service Order Material Data Collection** form when performing service order material transactions.

1 Specify these fields on the form:

Partner

Select the partner associated to the SRO.

SRO

Select the SRO.

Line

The SRO line is displayed. You can select a different SRO line.

Oper

The SRO operation number is displayed.

Item

Select the item associated to the SRO.

Customer Item

Select the customer item associated to the SRO.

Trans Type

The transaction type is displayed.

Qty

Specify the number of items on the transaction.

UM

Select the unit of measure for the items.

Whse

The warehouse associated to the SRO is displayed.

Location

Select the warehouse location.

Lot

If the transaction involves a serial tracked item, select the lot for the warehouse location to use for the material transaction.

Billing Code

The billing code assigned to the SRO is displayed.

Unit Price

Specify the amount being charged for the unit, if applicable.

Notes

Specify any additional notes related to the transaction.

Serial Numbers

The serial numbers associated with items are displayed.

2 Click **Submit** to submit the information and perform the transaction.

Performing a Multi-Site Service Order Copy

Use the **Multi-Site Service Order Copy** utility to copy a SRO from one site to another site.

NOTE: This utility only works between Live-Linked sites on the same SQL Server.

To copy the SRO:

1 In the **From** section, specify these fields:

SRO

Select the SRO to be copied.

Source SRO Action

- Leave Unchanged: Select this option to make no change to the source SRO upon successful copy of the SRO.
- Close: Select this option to set the source SRO status to **Close** upon successful copy of the SRO.
- Delete: Select this option to delete the source SRO upon successful copy of the SRO.

Copy Notes

Select this check box to copy the notes from the source SRO to the new SRO.

2 In the **To** section, specify these fields:

Site

Select the target site for the SRO.

SRO

The SRO is displayed.

For the SRO Type, Salesperson, Partners, and Operation Codes fields, if **Required** is selected, the SRO is not created if the field values do not match in the source site and target site. If **Blank** is selected, the SRO is created and the field value is set to blank in the target site when the entry is not valid.

3 Click **Process** to run the utility.

Adding Service Order Lines

Service order lines are associated with a specific SRO and define which unit or item is going to be serviced. On the **Service Order Lines** form, you can create, update, and delete SRO lines. On the **Service Order Lines** form, specify the following information for each line:

1 In the SRO header section, specify this information:

SRO

Select or specify the SRO number.

Description

A description of the SRO is displayed.

Customer

The customer number and description associated with the SRO are displayed.

Ship To

The customer ship to location and a description are displayed.

Status

The status of the SRO is displayed. These are possible status options:

- **Template:** Used as a generic setup for quickly creating new SROs.
- **Estimate:** Used for estimating cost and price information for a customer.
- **Open:** Indicates that no transactions are on hold and that the SRO may be invoiced. When first created, the status will automatically set to open.
- **Closed:** SRO is complete and no invoicing can be performed.

Partial Billing

This check box determines whether the SRO Invoice Print/Post program bills an SRO or SRO transactions with a status of bill hold. If the check box is selected at the header level, the program ignores the entire SRO. If the check box is cleared at the transaction level, only the transaction is ignored and all other transactions not on hold are still invoiced.

NOTE: A default value for new SROs can be set on the service order tab of the **Service Parameters** form.

2 In the Line header section, specify this information:

Line

The number assigned to the SRO line is displayed. Every item entered for a SRO requires a unique number. When adding lines to a SRO, the next available number is automatically populated if a specific value is not assigned.

Status

The current status of the SRO line is displayed. New lines have a default status of open.

Line Type

The type of the SRO line is displayed. Valid options are:

- **Service:** Unit/item is in for service
- **Loaner:** Unit/item is on loan
- **Adv Exch:** Unit/item is part of an advanced exchange

Unit

Select the unit for the SRO line. The unit is the complete material composition, including all sub-components, replacement parts, and or add-ons. The unit ID may or may not be the serial number of the unit.

Qty

Select the quantity for the line. The default value is one when a unit is selected. The value can only be updated when there is no unit number.

Inspection Type

Select an inspection type for the line. The combination of the SRO Line item and inspection type determines the inspection tasks that are assigned to the SRO line.

NOTE: After an inspection task has been measured, it cannot be changed on the SRO line. The measured values must be reset in order to associate the SRO line to a new inspection type.

Initial Failed Inspections

The number of failed inspections for the SRO line is displayed.

Adjusted Failed Inspections

The number of adjusted inspections for the SRO line is displayed.

Item

Select the item for the SRO line. If there is a unit specified for the line, then the item in stock that is associated with that unit number is displayed.

U/M

Select the unit of measure for the line. The default value is based on the unit or item selected.

Customer Item

Select a customer item. When you select an item, if a value has not yet been selected in the Item field and only one item exists for the Customer-Customer Item combination, the Item field displays that item. If more than one item exists, you must select the item you want.

Conversely, when you enter an Item, if a value has not yet been entered in the Customer Item field and only one customer item exists for the Customer-Item combination, the Customer Item field displays that Customer Item. If more than one Customer Item exists, you may select the customer item you want.

NOTE: A Customer Item number is not required.

Description

Specify a description for the line. The default is the description of the selected unit or item, but this value may be overwritten.

Contract

If the SRO line is tied to a service contract, it is displayed. The invoicing and billing are handled through the contract.

Line

If the SRO line is tied to a service contract line, it is displayed. The invoicing and billing are handled through the contract.

Source

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank, the system creates a new record of the source type specified when the cross reference is performed.

Source Button

Click this button to perform the cross reference. If the values for the three reference fields are blank, clicking the button sets them. If the three fields have been populated, the button accesses the appropriate form based on the source/destination type selected.

3 On the **General** tab, specify this information:

SRO Type

The type of the SRO is displayed. The available selections are set up and maintained through the **SRO Types** form.

Lead Partner

The partner responsible for the SRO is displayed.

Incident

If the SRO was created from cross-referencing an incident, the incident number is displayed.

Exchange Date

Select the calendar date on which the exchange will take place. This date is used in conjunction with the advanced exchange SRO type.

Due Date

Select the date on which the work is due.

Last Ship Date

The date that the last time the line item or a subcomponent of the line item was shipped is displayed.

Department

Select the department to associate with the SRO line.

To Be Scheduled

Select this check box to include the current incident or SRO in the scheduling process for partner assignment. If selected, the incident or SRO is displayed in the To Be Scheduled grid on the **Service Schedules** form. If unchecked, the incident or SRO can still be manually scheduled, but is not automatically on the **Service Schedules** form.

Awaiting Parts

Select this check box if the incident or SRO is dependent on material which is yet to be received. Whether this field is enabled is set by the Parts Fulfillment mode assigned on the **Service Parameters** form.

Qty Shipped

The number of items or units that have been shipped is displayed.

Qty Issued

The number of items or units that have been issued is displayed.

Qty Returned

The number of items or units that have been returned is displayed.

Product Code

The product code is displayed. The product code contains all of the General Ledger accounts that are be used for posting material, labor, and miscellaneous expenses to a SRO. The product code also contains the accounts that are used by the SRO Invoicing program for posting Cost of Goods Sold and Revenue amounts.

Price Code

The price code that was set up at the customer level is displayed.

Meter Amt

Specify the amount that has been recorded for the unit. For example, this value may be miles, impressions, clicks, and so on.

Meter Date

Select the date the meter reading is taken.

4 On the **Billing** tab, specify this information:

Billing Type

Unless you are copying from a template, the billing type will be the default value associated with the SRO type. If there is not a SRO type, the default value comes from the **Service Parameters** form. Billing types can be one of these:

- **Calculated/Time & Material:** Price is calculated by the summation of all material, labor, and miscellaneous items issued.
- **Project/Fixed:** Price is based on the manually entered fixed amount.

Bill Status

The current state of billing for a SRO is displayed.

Billing Code

The billing code assigned to the SRO type is displayed. The billing code is the type of method used to determine the amount to be billed for SRO material and labor transactions. These are the possible billing codes:

- **Contract:** The SRO is part of a contract and the transactions should not be charged to the customer; the default rate is 0.
- **No Charge:** The default rate is 0.
- **Warranty:** The SRO is associated with a unit that is under warranty and the transaction should not be charged to the customer; the default rate is 0.
- **Recover:** The default rate equals the cost of the transaction.
- **List:** The rate for material transactions is determined using the customer/item pricing logic; the rate for labor transactions is determined using the service pricing routine.

Material, Labor, Miscellaneous Acct Location

This field shows whether the accounts used for material, labor, and miscellaneous transactions are assigned at the operation or transaction level. The default settings from the SRO type are used.

Use Planned Pricing

Select this check box to use planned pricing as opposed to the normal pricing matrix.

Accumulate WIP

Select this check box if costs issued to the SRO are to be stored in WIP accounts.

Total Price

The running total of price for the SRO, SRO line, or SRO operation excluding freight, miscellaneous, and tax charges is displayed.

Total Billed

The running total of invoiced charges for the SRO, SRO line, or SRO operation is displayed.

Material Cost

The running total of material costs issued to the SRO, SRO line, SRO operation, or SRO transaction is displayed.

Labor Cost

The running total of labor costs issued to the SRO, SRO line, or SRO transaction is displayed.

Misc Cost

The running total of miscellaneous costs issued to the SRO, SRO line, SRO operation, or SRO transaction is displayed.

Total Cost

The accumulated total cost amount for the SRO line or SRO operation is displayed.

5 The **Inspections** tab is a read-only tab that shows the inspections on the service order line in a tree menu. Use these fields to change the display:

Show Labels

Select this check box to include labels in the Inspections tree.

Show Measured Value

Select this check box to include the measured value in the Inspections tree.

Show Items By

- **Item:** Select this option to list the items by name.
- **Description:** Select this option to list the items by their description.

6 Save the record.

Other Ways to Use the Service Order Lines Form

Use these buttons on the form as described here:

- Click **SROs** to launch the **Service Orders** form, filtered for the current SRO.
- Click **SRO Operations** to launch the **Service Order Operations** form, filtered for the current SRO.
- Click **SRO Transactions** to launch the **Service Order Transactions** form, filtered for the current SRO.
- Click **Copy Operations** to launch the **Service Order Quick Create** utility.
- Click **Inspections** to launch the **Service Order Line Inspections** form, filtered for the current SRO.

Adding Service Order Operations

Use the **Service Order Operations** form to create, update, and delete SRO operations. You can use operations to define the steps involved with performing the service on the unit or item defined on the SRO line.

On the **Service Order Operations** form, specifying the following information for each new operation:

1 Specify these fields in the SRO header section:

SRO

Select the unique alphanumeric used to identify the SRO.

Description

A brief description for the SRO is displayed.

Customer

Select the customer.

Ship To

The Customer Ship To location is displayed.

Status

Select the current status of the SRO line. The default status is Open upon creation.

Partial Billing

Select this check box if you want the SRO Invoice Print/Post program to bill an SRO or SRO transaction with a status of bill hold. If the check box is selected at the header level, the system ignores the entire SRO. If the check box is selected at the transaction level, only the transaction is ignored and all other transactions not on hold are invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

2 Specify these fields in the Line header section:

Line

Select the number assigned to the SRO line.

Unit

A unit is a complete material composition, including all subcomponents, replacement parts, and/or add-ons. Each unit is identified with a unique alphanumeric ID. This ID can be the serial number of the unit, but it does not have to be the serial number. If it is a serial number, that number does not have to exist in the **Serial Numbers** form. This allows you to service units that you did not manufacture.

Status

The status of the SRO line is displayed.

Item

The item number is displayed.

Quantity

Specify the quantity for the line. The default value is one when a unit is selected. The value can only be updated when there is no unit number.

U/M

Select the unit of measure for the line. The default value is based on the unit or item selected.

3 Specify these fields in the Operation header section:

Oper#

The operation number associated with the SRO line is displayed.

Operation Code

Select the operation code for the SRO. This code indicates what type of work the operation represents. The codes are set up and maintained on the **Service Operation Codes** form.

Description

Specify a brief explanation of the SRO operation.

Status

Select the current status of the SRO operation:

- Open: The operation is active
- Invoice: The operation is available to be invoiced by the SRO invoicing program
- Closed: The operation is complete

4 Specify these fields on the **General** tab:

Open Date

The date and time that the SRO or SRO operation was opened is displayed. The current system time upon starting a new SRO or line is used as the default time.

Close Date

Select the date and time that the SRO or SRO line was closed. The field will default in the current system time upon closure of the SRO or line.

Start Date

The date of entry into the system or when work commenced on the associated task is displayed.

End Date

The date and time that work was completed is displayed.

Planned Transaction Required

Select this check box if a planned transaction must exist before the line or operation can be invoiced.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

To Be Scheduled

Select this check box to indicate that the current incident or SRO is to be included in the scheduling process for partner assignment. If selected, the incident or SRO is displayed on the **Service Schedules** form when you do select a task and click **All To Be Scheduled**. If cleared, the incident or SRO can still be manually scheduled but is not automatically displayed on the **Service Schedules** form.

Awaiting Parts

Select this check box is the Incident or SRO is dependent on material that is yet to be received. Whether this field is enabled or disabled to the user is controlled by the Parts Fulfillment mode assigned at the Service Parameters level.

Approver

Select a partner to inspect and approve service order labor and/or material transactions.

Sign Off

Sign Off Date

Product Code

Select the product code for the SRO. This code contains all of the General Ledger Accounts that are used for posting Material, Labor, and Miscellaneous expenses to a SRO. The product code also contains the accounts that are used by the SRO Invoicing program for posting Cost of Goods Sold and Revenue amounts.

NOTE: A default value for new SROs can be set on the **Service Order** tab of the **Service Parameters** form.

Warehouse

Select the default warehouse to use for the SRO.

Price Code

Select the price code.

Lead Partner

Select the partner responsible for the SRO.

Department

Select the department out of which the partner works.

Duration

The sum of the total time remaining for work to be performed on the service order is displayed. The calculation is based on the accumulation of the Hours Worked values for any planned labor transactions associated with the SRO operation.

Calculate Button

Click this button to assign the duration field based on the accumulation of the Hours Worked values for any planned labor transactions associated with the service order operation.

Estimated Time Remaining

Specify the estimated time remaining for work to be performed.

5 Specify these fields on the **Billing** tab:

Billing Type

The billing type determines the total price for a service request order. Specify the billing type at the line or operation level of the SRO. A default value for billing type can be set on the **Service Parameters** form. Select one of these options:

- **Calculated/Time and Material:** Add all Material, Labor, and Miscellaneous items issued to calculate the price.
- **Project/Fixed:** Price is based on a manually entered, fixed amount.

- **Invoice Estimate**: Price is based on the invoice estimate amount. Use this type when the customer has agreed to pay an estimate amount, regardless of actual cost.

Bill Status

The current state of billing for a SRO is displayed.

Billing Code

Material Account Location

Specify whether the accounts used for material will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Labor Account Location

Specify whether the accounts used for labor will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Misc Account Location

Specify whether the accounts used for miscellaneous issues will be assigned at the operation or transaction level.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Bill Hold

Select this check box to put the service order operation or transaction on billing hold.

Accum Wip

Select this check box to store costs issued to the SRO in WIP accounts.

NOTE: A default value for new SROs can be set on the Service Order tab of the Service Parameters form.

Use Planned Pricing

Select this check box to use planned pricing instead of pricing based on partner, codes, and customer.

NOTE: A default value for new SROs can be set on the service order tab of the Service Parameters form.

Total Price

The running total of price for the SRO, SRO Line, or SRO Operation excluding freight, miscellaneous, and tax charges is displayed.

Total Billed

The running total of invoiced charges for the SRO, SRO Line, or SRO Operation is displayed.

Material Cost

The running total of material costs issued to the SRO, SRO Line, SRO Operation, or SRO Transaction is displayed.

Labor Cost

The running total of labor costs issued to the SRO, SRO Line, or SRO Transaction is displayed.

Miscellaneous Cost

The running total of miscellaneous costs issued to the SRO, SRO Line, SRO Operation, or SRO Transaction is displayed.

Total Cost

The accumulated total cost amount for the SRO Line or SRO Operation is displayed.

Tax Code

Select the tax code, which represents how the sales tax is calculated. Selections are set up and maintained through the **Tax Codes** form.

6 Specify these fields on the **Reasons** tab:

General Reason

Select the general code to represent why the incident is being logged. The general reason codes are maintained through the Service Reasons form.

Specific Reason

Select the specific code to represent why the incident is being logged. The specific reason codes are maintained on the **Service Reasons** form.

General Resolution

Select the general code to represent why the incident is being closed. The general resolution codes are maintained through the **Service Resolutions** form.

Specific Resolution

Select the specific code to represent why the incident is being closed. The specific resolution codes are maintained through the **Service Resolutions** form.

Reason Notes

Specify any additional explanations of service or incident reasons.

Resolution Notes

Specify any additional explanation for service resolutions.

General Activities Button

Click this button to launch the **Service Activities** modal form to show or record actions that have been or need to be taken to resolve the incident.

Specific Activities Button

Click this button to launch the **Activities** modal form to show or record actions that have been or need to be taken to resolve the incident or service order.

7 Specify this field on the **Cust Ovrd** tab:

Bill Customer Override

Optionally, select a different customer to bill for the operation than the one specified at the SRO header level.

Other Ways to Use the Service Order Operations Form

Use these buttons on the form as described here:

- Click **SROs** to launch the **Service Orders** form, filtered for the current SRO.
- Click **SRO Lines** to launch the **Service Order Lines** form, filtered for the current SRO.
- Click **SRO Transactions** to launch the **Service Order Transactions** form, filtered for the current SRO.
- Click **Copy Transactions** to launch the **Service Order Quick Create** utility.

Adding SRO Transactions

Use the **Service Order Transactions** form to enter, post, and remove material, labor, miscellaneous, and line transactions for a service order. You can enter a transaction against more than one SRO at a time. When labor, material, or miscellaneous charges are applied to a SRO, the transaction must be posted.

On the **Service Order Transactions** form, specify this information for each new transaction:

1 In the Filter section, specify these fields to filter for SRO transactions:

Partner ID

Select the partner associated with the SRO transaction.

SRO

Select the unique alphanumeric used to identify the SRO.

Line

Select the number assigned to the SRO line.

Operation

The operation number associated with the SRO line is displayed.

Type:

- **Actual**: Transactions that have been issued to a SRO
- **Planned**: Transactions used to record a plan of the amount of material, labor, and miscellaneous transactions that will be required for the SRO.

Date Range

Select the range of calendar dates to include in the results.

Include Posted

Select this check box to include posted transactions in the results.

Include Unposted

Select this check box to include transactions as part of the results.

Include Templates

Select this checkbox to include transactions of SRO templates in the grids.

Additional Filters Button

Click this button to launch the **Service Order Transactions Filters** form.

Clear Filter Button

Click this button to clear any currently populated filter options.

Apply Filter Button

Click this button to filter for results based on the selected options.

2 These fields are shared in the grids on some of the tabs:

Posted

This check box indicates whether or not the transaction has been posted to the SRO.

Bill Hold

Select this check box to put the service order operation or transaction on billing hold.

Partner

The partner is displayed.

Transaction Date

Select the date to use for posting this transaction. The current date is the default value.

SRO

The unique alphanumeric used to identify the SRO is displayed.

Line#

The number assigned to the SRO line is displayed.

Oper#

The operation number associated with the SRO line is displayed.

Quantity

Specify the number or amount of units/items to be used on transaction, order, and so on.

Warehouse

Select the default warehouse to use for the SRO.

Post Date

Select the month, day, and year that will be assigned for account posting.

Dept

Select the department out of which the partner works.

Billing Code

Material Cost

Specify the total amount of material cost.

Labor Cost

Specify the total amount of labor cost.

Fovhd Cost

Specify the total amount of fixed overhead cost.

Vovhd Cost

Specify the total amount of variable overhead cost.

Outside Cost

Specify the total cost of the outside services portion for the current item.

Unit Cost

Specify the Unit Cost of the item. The amount is calculated as follows:

Unit Cost = Material Cost + Labor Cost + Fixed Overhead Cost + Variable Overhead Cost + Outside Cost

Unit Price

Specify the amount being charged for the material.

Price Currency

Select the currency type in which the item price is listed. The currency codes are set up and maintained through the **Currency Codes** form.

Discount

Specify the percentage discount that will be given to the SRO transaction.

Cost Currency

The currency type in which the item cost is listed. The currency codes are set up and maintained through the **Currency Codes** form.

Tax Code

Select the tax code, which represents how the sales tax is calculated. Selections are set up and maintained through the **Tax Codes** form.

Sales Tax

Specify the amount of sales tax to be charged to the SRO transaction.

Ext Cost

The extended cost of the transaction line item is displayed. This value is determined by multiplying the **Quantity** field by the **Unit Cost** field.

Ext Price

The extended price of the transaction line item is displayed. This value is determined by multiplying the **Quantity** field by the **Unit Price** field.

Transaction Number

A system-generated number used to identify the specific transaction is displayed.

Post Date

This field is blank by default. After the posting process is completed, the date the transaction was posted is displayed.

Invoice

The number of the invoice that corresponds to that transaction is displayed.

Bill Status

The current billing status of the transaction is displayed.

Sign Off and Date

The partner and date entered on the **Service Order Operations** form when the operation is signed off is displayed.

Descriptions

The descriptions from each of the SROs, lines and operations is displayed.

3 Specify these additional fields on the **Material** tab:

Serials Button

Click this button to launch the **Service Serials** modal form. This form can be used to view or generate serial numbers for the associated item.

Drop Ship Button

Click this button to launch the **SRO Drop Ship To** form.

Transaction Type

Select the type of material transaction that is being performed on a SRO.

Item

The item number is displayed.

Impact Inventory

Select this check box if you want the transaction to affect inventory levels. This check box is disabled for SRO transactions with the type of loaner.

Customer Item

Select the customer item. These are maintained on the **Customer Item Cross References** form.

U/M

Select the abbreviation for the unit of measure used to quantify the number of units or items.

Item Description

A brief description of the item is displayed.

Location

Select the warehouse location to use for the material transaction.

Lot

If the transaction involves a serial tracked item, select the lot for the warehouse location to use for the material transaction.

Drop Ship To

Drop Ship

Specify these fields when the type is Planned:

Source Fields

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank, the system creates a new record of the source type specified when the cross reference is performed.

Source Button

Click this button to show the corresponding screen of the originating source. For example, if you are producing the item as a purchase order, click this button to show the cross-referenced purchase order record.

4 Specify these additional fields on the **Labor** tab:

Total Hours Worked

Specify the total hours worked for the transaction. This value is displayed in the grid.

Total Hours to Bill

Specify the total hours to bill for the transaction. This value is displayed in the grid.

Work Code

Select the code used to represent the type of work that is being recorded to a SRO. Codes are set up and maintained on the **Work Codes** form.

Hours Worked

Specify the number of hours spent by a partner working on a transaction.

Hours To Bill

The number of hours to be charged for work performed is displayed.

Work Code Description

The explanation of what the work code represents is displayed.

Cost

The running total of labor costs issued to the SRO, SRO Line, or SRO Transaction is displayed.

Labor Rate

The hourly rate of a partner for the type of work being performed is displayed.

Start Time

Select the start time for the current record.

End Time

The date and time the work was completed is displayed.

Reimburse Labor

Select this check box to reimburse the partner for labor transactions on incidents that the partner is assigned to. If this field is cleared, costing for the associated transactions is not affected.

Specify these fields when the type is Planned:

Dispatch Button

Click this button to launch the **Service Schedule Dispatch** form.

Source Fields

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank, the system creates a new record of the source type specified when the cross reference is performed.

Source Button

Click this button to show the corresponding screen of the originating source. For example, if you are producing the item as a purchase order, click this button to show the cross-referenced purchase order record.

5 Specify these additional fields on the **Miscellaneous** tab:

Misc Code

Select the unique alphanumeric code that represents a particular type of expense that is charged to a SRO.

Misc Code Description

The explanation of what the work code represents is displayed. The description is assigned on the **Miscellaneous Codes** form.

Payment Type

Select the code for the payment type being used. The selections available are set up and maintained using the **Payment Types** form.

Specify these fields when the type is Planned:

Source Fields

Select the type of record to cross-reference. The three ID fields can be used to specify existing records. If left blank, the system creates a new record of the source type specified when the cross reference is performed.

Source Button

Click this button to show the corresponding screen of the originating source. For example, if you are producing the item as a purchase order, click this button to show the cross-referenced purchase order record.

6 Specify these additional fields on the **Line Material** tab:

Serials Button

Click this button to launch the **Serials** modal form. This form can be used to view or generate serial numbers for the associated item.

Drop Ship Button

Click this button to launch the **SRO Drop Ship To** form.

Transaction Type

Select the type of material transaction that is being performed on a SRO.

Item

The item number is displayed.

Impact Inventory

Select this check box if you want the transaction to affect inventory levels.

Customer Item

Select the customer item. These are maintained on the **Customer Item Cross References** form.

U/M

Select the abbreviation for the unit of measure used to quantify the number of units or items.

Location

Select the warehouse location to use for the material transaction.

Lot

If the transaction involves a serial tracked item, select the lot for the warehouse location to use for the material transaction.

Drop Ship To

Reimbursements Tax Codes

The Reimbursement Tax codes are for the user to specify a rate type tax code used to create the distributions on the Voucher or Credit Memos during reimbursement for the specified reimbursement Tax Amount. The Reimbursement Tax and Codes are only enabled when the partner of the SRO Transaction is marked for reimbursement. The Reimbursement Currency is pulled from the Currency associated to the Partner/Reimbursement Method.

Other Ways to Use the SRO Transactions Form

Use these buttons on the form as described here:

- Click **Notes** to launch the **Notes** form, where you can read, edit, or add descriptive notes about the currently displayed record.
- Click **Unpost Batch** to unpost the group of selected lines.
- Click **Unpost Transaction** to unpost the selected transaction. Only transactions that have not been billed are eligible for unposting.
- Click **Post Transaction** to post the selected transaction to the SRO.
- Click **Post Batch** to post all the transactions for the selected tab to the SRO.

Setting Up Service Order Labor Rates

Use the **Service Order Labor Rates** form to set up labor rates for a specific SRO. Specify these fields on the form:

SRO

Select the unique alphanumeric code used to identify the SRO.

Customer

Select the customer.

Ship To

The Customer Ship To location is displayed.

Partner

Select the partner associated with the SRO.

Work Code

Select the code used to represent the type of work that is being recorded to a SRO. Codes are set up and maintained on the **Work Codes** form.

Rate

Specify the hourly rate of a partner for the type of work being performed.

Use Customer Currency

Select this check box to use the customer currency instead of the domestic currency.

Processing Promotional Discounts for Service Orders

A salesman or billing manager can apply a promotional discount to a service order. Follow these steps to process a discount:

1. On the Service Orders form, filter for the service order for which you want to add a discount.
2. On the Deposits tab, click Deposits to launch the Service Order Deposits form.
3. Add a new promotional discount and save the record.
4. Return to the Service Orders form and select Apply Open Deposits.
5. Save the record.

After the work is completed, run the Service Order Invoicing form. The discount is recognized as a prepaid amount and subtracted from the invoice total. On the Billing tab of the Service Orders form, the total billed value before the discount is displayed. On the Deposits tab, you can see how the deposit was applied.

Processing Service Order Deposits

Some service orders require a deposit before work can be performed. To process a deposit:

1. On the Service Orders form, you can view the net price of a service order on the Billing tab.

   On the Deposits tab, specify the required deposit amount.

   When the customer pays the deposit, it is captured on the A/R Payments form.
2. On the A/R Payment Distributions form, distribute the payment to the service order as a deposit.
3. Post the payment on the A/R Payment Posting form.

   After the payment is posted, the deposit amount entry is displayed on the Deposits tab on the Service Orders form.
4. After the work is completed, run the Service Order Invoicing form. The deposit is recognized as a prepaid amount and subtracted from the invoice total.

   On the Service Orders form, the Deposits tab shows the applied deposit.

Tracking Service Orders with the Service Console

Use the **Service Console** form to track and maintain service orders after they are created. Using this form, you can stay on one screen to enter and track service information for incidents, items, contracts, and SROs. On the form, you can display incidents and service orders by customer, consumer, or unit. This feature is especially useful for companies that sell mainly to re-sellers, but take service calls directly from the end user.

Specify this information on the **Service Console** form:

1. For the **Customer Mode**, specify these fields:

Customer

Select the unique number and name used for identifying a customer.

Ship To

The customer ship to location is displayed.

Hold

If there is a credit hold, the reason for the hold is displayed.

1. For the **Consumer Mode**, specify these fields:

   Select the unique number and name used for identifying a consumer.

   Consumer Ship To

   The consumer ship to location is displayed.

   Customer

   The customer is displayed.

2. For the **Unit Mode**, specify these fields:

   Unit

   Select the unit number.

   Find Unit Button

   Click this button to launch the **Unit Configuration Search** modal form and search for a unit.

   Item

   The item associated with the unit is displayed.

   Customer

   The customer associated with the unit is displayed.

   Ship To

   The customer ship to location is displayed

   Hold

   If there is a credit hold, the reason for the hold is displayed.

Specify these fields to filter the results in the grids:

1 For the **Incident** grid, specify these fields:

Status

Select which incidents to display in the grid based on status: open, closed, or all.

Create Incident Button

Click this button to launch the **Quick Incident Create** utility.

Ref

The source of the incident is displayed.

X-Ref Button

Click this button to perform a cross reference from the incident to the source.

Search Button

Click this button to launch the **Reason/Resolution Search** form.

2 For the **SRO** grid, specify these fields:

Status

Select which SROs to displayed in the grid based on status: open, closed, estimate, or all.

Create SRO Button

Click this button to launch the **Quick SRO Create** utility.

Generate Callback SRO

Click this button to launch the **Quick SRO Create** utility.

3 For the **Transactions** grid, select which type of transaction to display: actual, planned, or estimate.

Click **Transaction** to launch the **SRO Transactions** form, filtered for the current SRO.

4 For the **SRO Totals** grid, use these fields to specify the values that are displayed:

- SRO
- Line
- Oper
- Price
- Cost
- Margin

Using the Service Reason/Resolution Search Utility

Use the **Service Reason/Resolution Search** utility to locate specific incidents or SROs.

1 Select the type of search to perform:

- **Begins**: Results have the same beginning as the specified text
- **Contains**: Results contain the entirety of the specified text
- **Ends**: Results have the same ending as the specified text

2 Specify the text to use in the search.

3 Specify the maximum number of results to list.

4 Select the types of incident notes to include in the results:

- Reason Notes

- Resolution Notes
- Incident Desc
- Incident Notes

5 Select the types of SRO notes to include in the results:

- Reason Notes
- Resolution Notes
- SRO Desc
- SRO Notes
- Lines
- Line Notes
- Operations
- Operation Notes

6 Select a range of dates to use for the results.

7 Select the unit to use in the search.

8 Click **Search** to populate the search results based on the filters selected.

9 Click **View** to launch the **Incidents** or **Service Orders** form for the currently selected incident or SRO.

Billing Service Orders

The **Service Order Billing Console** is designed to improve visibility of complex information for billing managers. The billing manager is provided the price, cost, and margin information sub-totaled in numerous ways to assist in the billing review process.

If the user is associated to a Service Partner, then the Partner ID will default in the Billing Manager field. Even though billing can be performed at the SRO Operation level, this form gives a higher level view of the entire SROs billing status. Key columns which will help a billing manager determine billing readiness are:

- **Ready To Invoice**: The SRO will have an Open status and an Operation status of 'Invoice', the SRO may have a 'Project Fixed' Operation which has an unbilled amount (i.e. Actual Transactions which have been recently posted which have not been included in a previous invoice run). This calculation includes Line Material, Operation Labor/Material/Miscellaneous Transactions.
- **Has Unposted Trans**: When this column is check it alerts the billing manager that actual transactions have been entered but not posted, thus will not be picked up by invoicing
- **Project Percent Complete**: The percent complete could be calculated at the operation level summing the total planned price from SRO Transactions and comparing it to the total actual price from SRO Transactions. This will be done even though the amount being billed is coming from the Operation Total Price. Only Operations which are NOT Closed will be considered.

- **Various Totals**: The rest of the total fields sum up the values from the SRO Operation and line as their label suggests.

Leverage the designer mode to create a personalized Billing Console form by Form User or Group. Through rearranging columns by order of importance and hiding columns which do not pertain to a specific user or group, the usability of the Billing Console can be increased.

Process Flow

Specify these fields on the **Service Order Billing Console**:

1 Specify these fields in the **Filter** section:

Billing Manager

Select the billing manager. The default value is the partner ID associated to the current user.

Specific SRO

Select a specific SRO to filter on.

Working Status

Select the working status to use to filter for the SRO.

Include Only Ready to Invoice

Select this check box to only include operations that meet the user-defined filters and are of Invoice status.

Include Bill Hold

Select this check box to include SRO operations that are marked as on Bill Hold.

Customer

Use these fields to filter to a specific customer range.

Region

Use these fields to filter to a specific region.

Salesperson

Use these fields to filter to a specific salesperson range.

Apply Filter Button

Click this button after each filter is applied to regenerate the Detail section.

2 These fields are populated in the grid:

Total Price

The price of the SRO excluding freight, miscellaneous, and tax charges.

Total Billed

The invoiced charges of the SRO including freight, miscellaneous, and tax amounts.

Total On Hold

The price of all Project Fixed operations on hold plus the price of all transaction which are on hold where operation bill type is Calculated T/M.

Total Invoice Status

The price of all Project Fixed operations where the operation status is set to Invoice plus the price of all transactions where operation bill type is Calculated T/M and the operation status is Invoice.

Total Open Status

The price of all Project Fixed operations where the operation status is set to Open plus the price of all transaction where operation bill type is Calculated T/M and the operation status is Open.

Total Close Status

The price of all "Project Fixed" operations where the operation status is set to "Closed" plus the price of all transaction where operation bill type is "Calculated T/M" and the operation status is "Closed".

Project Fixed

The price of only operations where the bill type is "Project Fixed".

Project Percent Complete

The total planned price from SRO Transactions compared to the total actual price from SRO Transactions for all operations which are not closed (regardless of SRO Operation Bill Type).

Total Calculated T/M

The planned transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Actual Calculated T/M

The actual transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Planned Matl

The planned material transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Actual Matl

The actual material transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Planned Labor

The planned labor transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Actual Labor

The actual labor transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Planned Misc

The planned miscellaneous transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Actual Misc

The actual miscellaneous transaction prices of only operations where the bill type is Calculated T/M (and are not closed).

Total Planned Cost

Sums the all planned transaction costs of only operations where the bill type is Calculated T/M (and are not closed).

Total Cost

The cost all actual transactions plus the cost of each Project Fixed operation

Total Margin

1 - ((Total Price - Total Cost) / Total Price)

Total Planned Margin

1 - ((Total Planned Price - Total Planned Cost) / Total Planned Price)

3 The SRO structure (Header, lines, operations, & SRO Notes) is displayed in the **Detail** tree view for the highlighted SRO.

4 The **Notes** grid lists all SRO Notes specific to the highlighted row in the totals grid. The area below the grid shows the full notes content.

5 Use these buttons in the **Action** section:

Click **Select All Button** to mark all SROs in the totals grid as selected.

Click **Deselect All Button** to deselect all SROs in the totals grid as selected.

Click **Apply Bill Hold** to put all selected SROs on Bill Hold.

Click **Remove Bill Hold** to take all selected SROs off Bill Hold.

Click **Set To Invoice** to change the operation status of all selected SROs to Invoice.

Click **Set To Open** to change the operation status of all selected SROs to Open.

6 The amounts displayed in the **SRO Totals Breakout** section are dynamically dependant on the mode: Price, Cost, or Margin. As each mode is selected, the user is provided a detailed breakdown of amounts in various buckets.

Other Ways to Use the Service Order Billing Console Form

Use these buttons on the form as described here:

- Click **SROs** to launch the **Service Orders** form filtered for the current SRO.
- Click **SRO Lines** to launch the **Service Order Lines** form filtered for the current SRO.
- Click **SRO Operations** to launch the **Service Order Operations** form filtered for the current SRO.
- Click **SRO Transactions** to launch the **Service Order Transactions** form filtered for the current SRO.
- Click **SRO To Be Invoiced Report** to launch the **SRO To Be Invoiced Report** filtered for the current SRO.
- Click **SRO Invoicing** to launch the **Service Order Invoicing** form filtered for the current SRO.

Invoicing Service Orders

Running the Service Order To Be Invoiced Report

Use the **Service Order To Be Invoiced Report** to preview or print a list of the service request orders that are eligible to be invoiced.

Specify this information to generate a report:

1 For these fields, select a range of values to include in the report:

- SRO
- Line
- Oper
- Bill Manager
- Customer
- Region

2 Select the Operation Status.

- SRO
- Sales
- Parts

3 Select the types of notes to include in the report:

- Print Customer Notes
- Print SRO Notes
- Print SRO Line Notes
- Print SRO Oper Notes
- Print Transaction Notes
- Print Internal Notes
- Print External Notes

4 Specify the Calculated SRO Options:

Trans Date

Select the range of transaction dates to include in the report.

Include Calculated

Select this check box to include SROs with the billing type of Calculated/Time & Material.

5 Specify the Project SRO Options:

Close Date

Select the range of close dates to include in the report.

Include Project

Select this check box to include SROs with the billing type of Project/Fixed.

Print Project Material Detail

Select this check box to include the material detail in the report.

Print Project Labor Detail

Select this check box to include the labor detail in the report.

Print Project Misc Detail

Select this check box to include the miscellaneous detail in the report.

6 Specify the Print Options:

Ship To Address

Select whether to use the customer ship to or the consumer ship to address for the invoicing output.

Sort By

Select whether to sort the output order by SRO or by customer.

Invoices or Credit Memos

Select whether to print invoices or credit memos based on the options selected.

Include Bill Hold

Select this check box to include bill hold detail in the report.

Summarize Trans

Select this check box to include a summary of transactions in the report.

Print Serials

Select this check box to include serial numbers for items that are serial tracked in the report.

Translate To Domestic Currency

Select this check box to translate the currency output to the domestic form. If cleared, the output is displayed as the currency originally selected.

Print Euro Total

Select this check box to print the total for the report in both the euro currency and the transaction currency for any customer or vendor whose currency is the euro.

The system calculates this total by converting all the individual line items and accumulating the euro line item amounts. All line item discounts are applied (using the transaction currency) before the system converts the amount to the euro. All order-level discounts are applied from the accumulated euro amount.

Display Report Header

Select this check box if you want to display report headers in the report. The report header displays on the first page of the report and lists the parameters by which you generated the report.

7 Click **Preview** to launch a preview of the report output.

8 Click **Print** to print the report output.

Running the Service Order To Be Invoiced Report

Use the **Service Order To Be Invoiced Report** to preview or print a list of the service request orders that are eligible to be invoiced.

Specify this information to generate a report:

1 For these fields, select a range of values to include in the report:

- SRO
- Line
- Oper
- Bill Manager
- Customer
- Region

2 Select the Operation Status.

- SRO
- Sales
- Parts

3 Select the types of notes to include in the report:

- Print Customer Notes
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- Print SRO Line Notes
- Print SRO Oper Notes
- Print Transaction Notes
- Print Internal Notes
- Print External Notes

4 Specify the Calculated SRO Options:

Trans Date

Select the range of transaction dates to include in the report.

Include Calculated

Select this check box to include SROs with the billing type of Calculated/Time & Material.

5 Specify the Project SRO Options:

Close Date

Select the range of close dates to include in the report.

Include Project

Select this check box to include SROs with the billing type of Project/Fixed.

Print Project Material Detail

Select this check box to include the material detail in the report.

Print Project Labor Detail

Select this check box to include the labor detail in the report.

Print Project Misc Detail

Select this check box to include the miscellaneous detail in the report.

6 Specify the Print Options:

Ship To Address

Select whether to use the customer ship to or the consumer ship to address for the invoicing output.

Sort By

Select whether to sort the output order by SRO or by customer.

Invoices or Credit Memos

Select whether to print invoices or credit memos based on the options selected.

Include Bill Hold

Select this check box to include bill hold detail in the report.

Summarize Trans

Select this check box to include a summary of transactions in the report.

Print Serials

Select this check box to include serial numbers for items that are serial tracked in the report.

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Select this check box to translate the currency output to the domestic form. If cleared, the output is displayed as the currency originally selected.

Print Euro Total

Select this check box to print the total for the report in both the euro currency and the transaction currency for any customer or vendor whose currency is the euro.

The system calculates this total by converting all the individual line items and accumulating the euro line item amounts. All line item discounts are applied (using the transaction currency) before the system converts the amount to the euro. All order-level discounts are applied from the accumulated euro amount.

Display Report Header

Select this check box if you want to display report headers in the report. The report header displays on the first page of the report and lists the parameters by which you generated the report.

7 Click **Preview** to launch a preview of the report output.

8 Click **Print** to print the report output.

Running SRO Invoicing

Use the **Service Order Invoicing** form to post SRO invoices and create invoice records.

Specify this information to post an invoice and create a record:

1 For these fields, select a range of values to include in the report:

- SRO
- Line
- Oper
- Bill Manager
- Customer
- Region

2 Select the types of notes to include in the report:

- Print Customer Notes
- Print SRO Notes
- Print SRO Line Notes
- Print SRO Oper Notes
- Print Transaction Notes
- Print Internal Notes
- Print External Notes

3 Specify these fields:

Ship To Address

Select whether to use the customer ship to or the consumer ship to address for the invoicing output.

Sort By

Select whether to sort the output order by SRO or by customer.

Order By

Select whether to sort the output order by transaction number, transaction date, or partner and transaction date.

Invoices or Credit Memos

Select whether to print invoices or credit memos based on the options selected.

Invoice Date

Select the date to use for invoicing the SROs.

4 Specify the Calculated SRO Options:

Trans Date

Select the range of transaction dates to include in the invoice.

Include Calculated

Select this check box to include SROs with the billing type of Calculated/Time & Material.

5 Specify the Project SRO Options:

Close Date

Select the range of close dates to include in the invoice.

Include Project

Select this check box to include SROs with the billing type of Project/Fixed.

Print Project Material Detail

Select this check box to include material details in the invoice.

Print Project Labor Detail

Select this check box to include labor details in the invoice.

Print Project Misc Detail

Select this check box to include miscellaneous details in the invoice.

6 Specify these Print Options:

Print Serials

Select this check box to include serial numbers for items that are serial tracked.

Summarize Trans

Select this check box to include a summary of transactions.

Use Profile

Select this check box to use the associated vendor/customer document profile, if one exists.

Translate To Domestic Currency

Select this check box to translate the currency output to the domestic form. If cleared, the output is displayed as the currency originally selected.

Print Euro Total

Select this check box to print the total for the report in both the euro currency and the transaction currency for any customer or vendor whose currency is the euro.

The system calculates this total by converting all the individual line items and accumulating the euro line item amounts. All line item discounts are applied (using the transaction currency) before the system converts the amount to the euro. All order-level discounts are applied from the accumulated euro amount.

7 Click **Process** to run the activity.

8 Specify the Reprint Options:

Invoice

Select the range of invoice numbers to include.

Invoice Date

Select the range of invoice dates to include.

9 Click **Reprint** to print the data without any updates or to reprint the document.

Multi-Lingual Invoice Support

With service order and contract invoices, you can print items, ship via, and general invoice text in the customer language, based on the customer language code, if the translated text is defined on these forms:

- **Multi-Lingual Service Invoice form:** Define and store translated invoice text for each customer language code. The standard invoice text is defined on the Service Parameters form, and you can enter different translations by language code.
- **Multi-Lingual Ship Via form:** Define and store the translated description of the shipping method.
- **Multi-Lingual Item form:** Define and store translated item descriptions.

Using the Multi-Lingual Service Invoice Form

Use the **Multi-Lingual Service Invoice** form to translate field labels when printing a service invoice in a foreign language. Specify one record for each Language Code associated with a customer. Specify these fields on the form:

Language and Description

Specify the language ID, and the language description is displayed.

Invoice Text

The text that displays at the bottom of every SRO invoice is displayed. This is defined on the **Service Parameters** form.

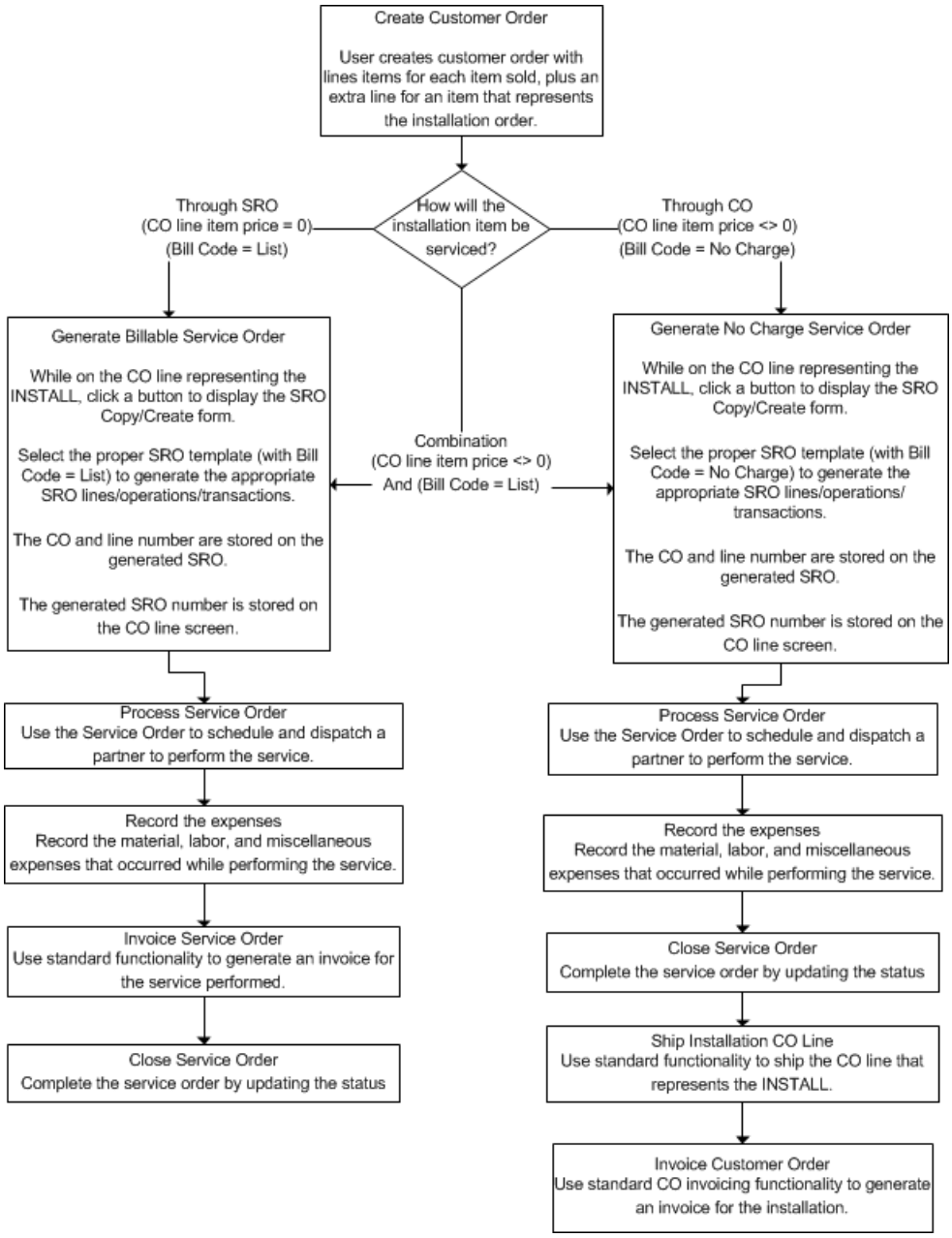
Invoice Text (Translated)

Specify the translation of the above text, which is displayed on the service invoice when the invoice is printed for a customer who uses the selected language.

Linking Customer Orders to SROs

Overview

As customer orders are created, line items on the order can be cross-referenced to a service order allowing service charges, such as installation of the part sold, to be linked to the original sale. You can use scheduling, cost tracking, and other service-related features to help manage the installation process, as shown in this diagram:



Customer Order to Service Order Relationship

Not only does the customer order line show the SRO to which it is associated, but the SRO header shows the customer order and line from which the SRO was created. When the service order is created, you can specify an SRO template. The new SRO inherits the customer number of the order, and the SRO lines that are created are set to match the customer order lines. Customer order shipping transactions display the SRO number of each customer order line to alert you that a service task exists.

Note: A separate SRO must be created for each customer order line.

Invoice Support

Depending on how your system is implemented, the price of the service order can be displayed and handled through customer order invoicing, through the service module, or through both. When the line item of the order contains a zero price value, the SRO can be set up as **list** and processed through Service Order Invoicing. When the line item of the order has a value greater than zero, the SRO can be configured as **no charge** and no SRO invoice is generated in the service module. When the line item of the order has a value greater than zero, the SRO can also be configured as **list** to record additional installation charges within the Service module.

NOTE: Even if the SRO is set to a specific bill code upon creation, it is still possible to change the bill code within the service order maintenance forms.

Cost and Revenue Connection

To link the cost of service with the price of the customer order, use one of these options:

- **Product Code Setup:** If the cost versus revenue association only needs to occur at the general ledger level, you can set up the installation SRO to use the same product code as the item that is placed on the customer order. Revenue is recognized as the customer order is shipped, and cost is recognized as transactions are posted to the SRO.
- **SRO Line Return to Inventory:** Use a lot-tracked or serial-tracked item to represent the installation process. Use the SRO line Return to Inventory transaction upon completion of the installation process to place the installation item back into inventory with the rolled up costs associated with the SRO. Then, when you ship the CO Line, the item cost is used as the COGS entry associated with the customer order.
- **Custom Reporting:** Using the cross-reference between the Customer Order Line and SRO Header, you can write a custom report to associate the price on the customer order line with the rolled up costs on the installation SRO.

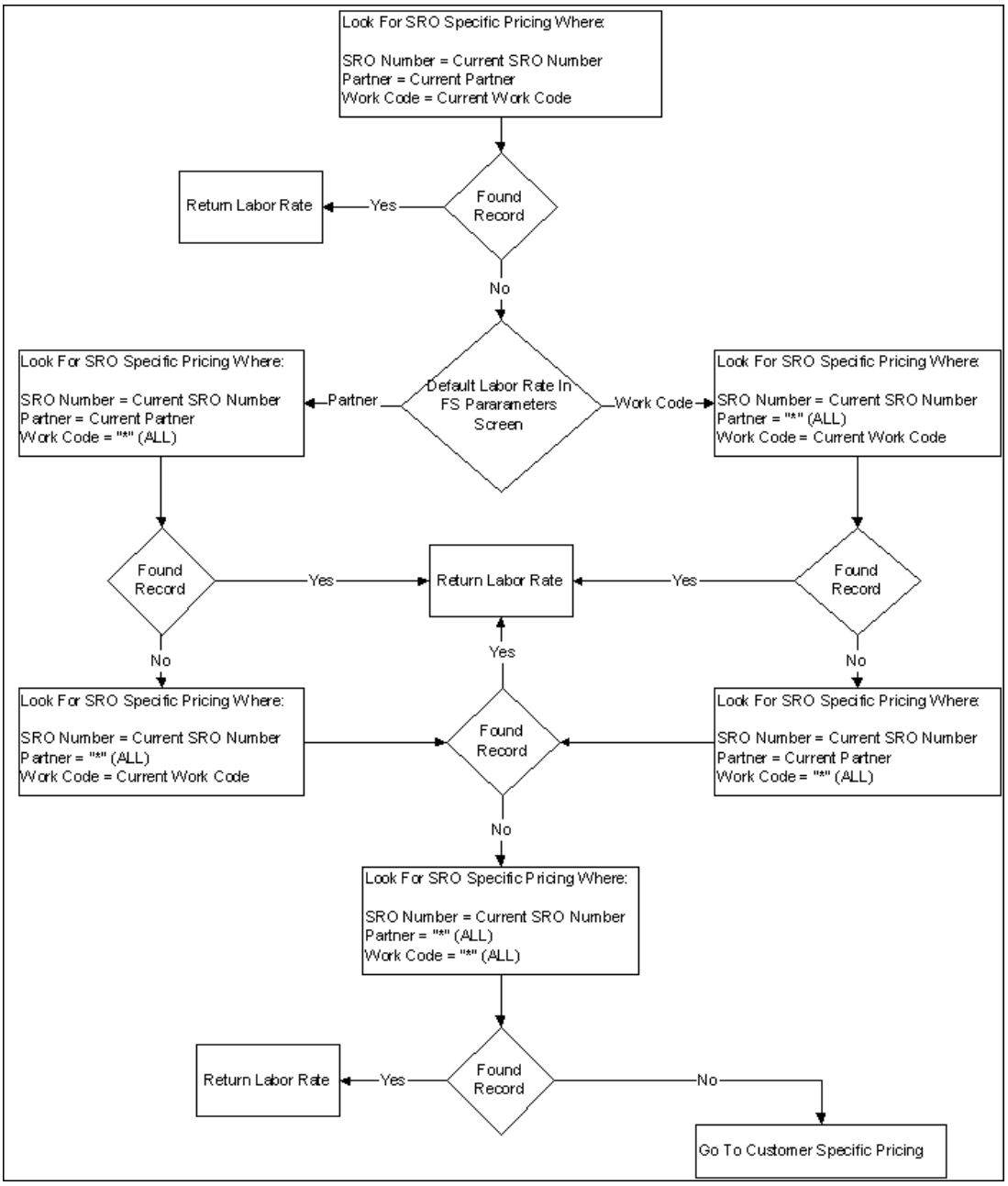
About Service Order Pricing

For materials used on a service order, the standard pricing algorithms are used to determine a list price for items that are not covered under warranty. For labor transactions, pricing is based on SROs, customers, and partner/work code combinations.

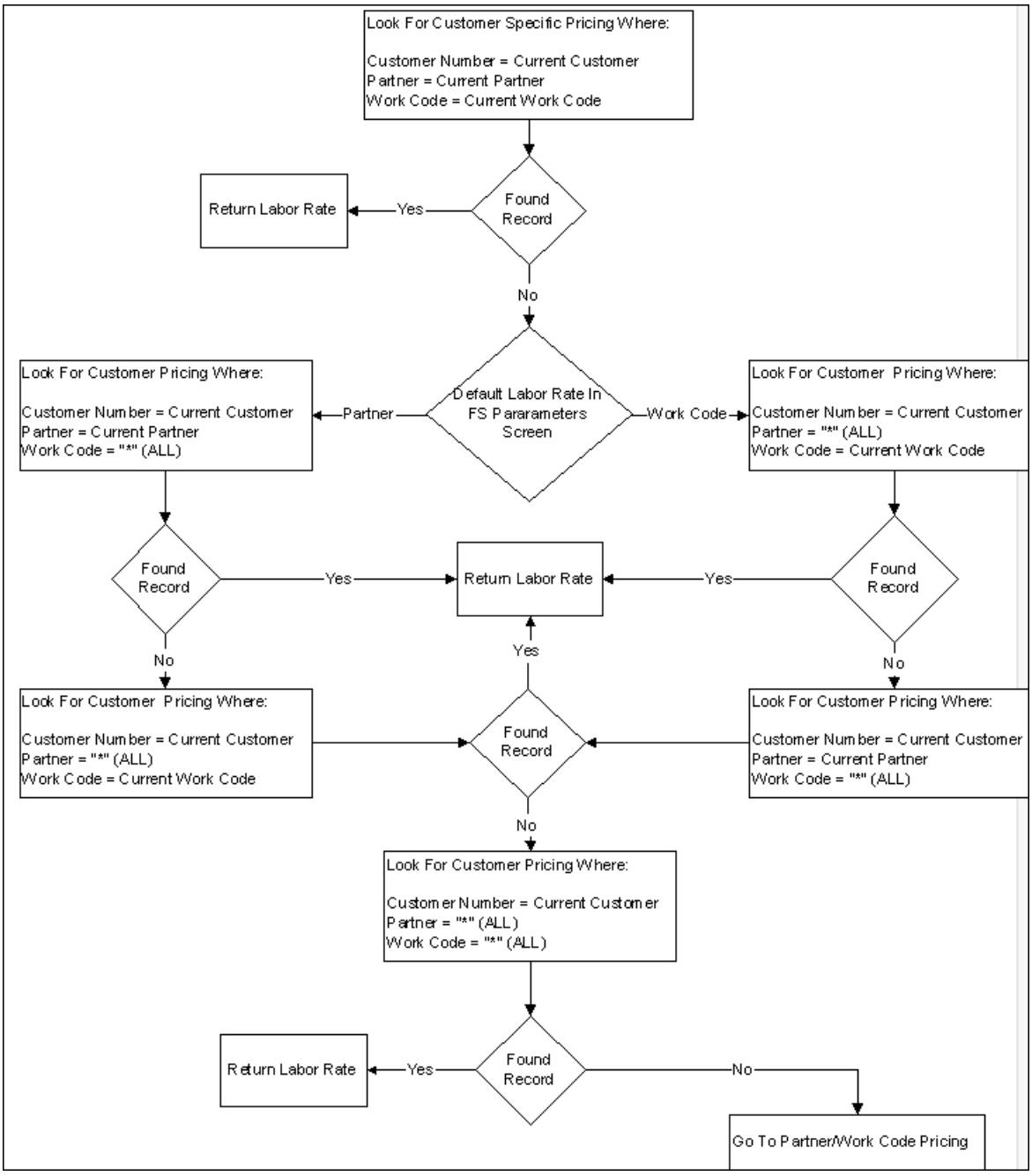
As labor expenses are entered for service orders, the price of each transaction is determined using a multi-level pricing algorithm. Use the **Service Order Labor Rates** form to view and modify the pricing defaults.

Process Flows

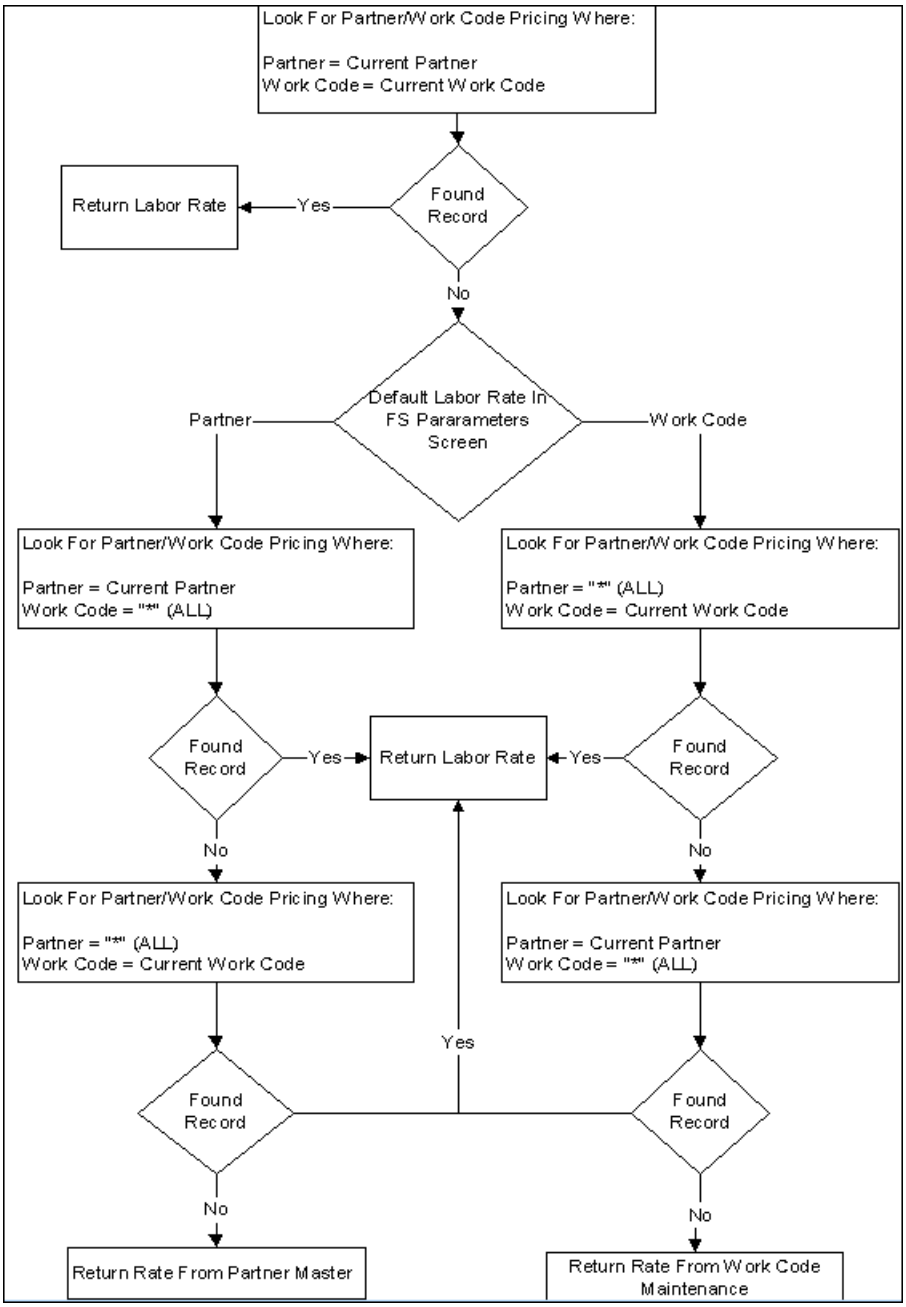
Service Order-Specific Pricing



Customer-Specific Pricing



Partner/Work Code Pricing



SRO Accounting

About Service Order Accounting

By Service Order operation, you can change the way that costing and revenue are handled from an accounting perspective.

Accumulate WIP

The Accumulate WIP check box determines how and when expenses are posted to cost of goods sold (COGS). If the check box is selected, the cost from the SRO is put into WIP then moved to COGS when the service order is invoiced. If the check box is cleared, transactions are invoiced immediately as they are posted to the service order.

Use the check box on these forms:

- Service Parameters
- Service Orders
- Service Order Templates
- Service Order Lines
- Service Order Types

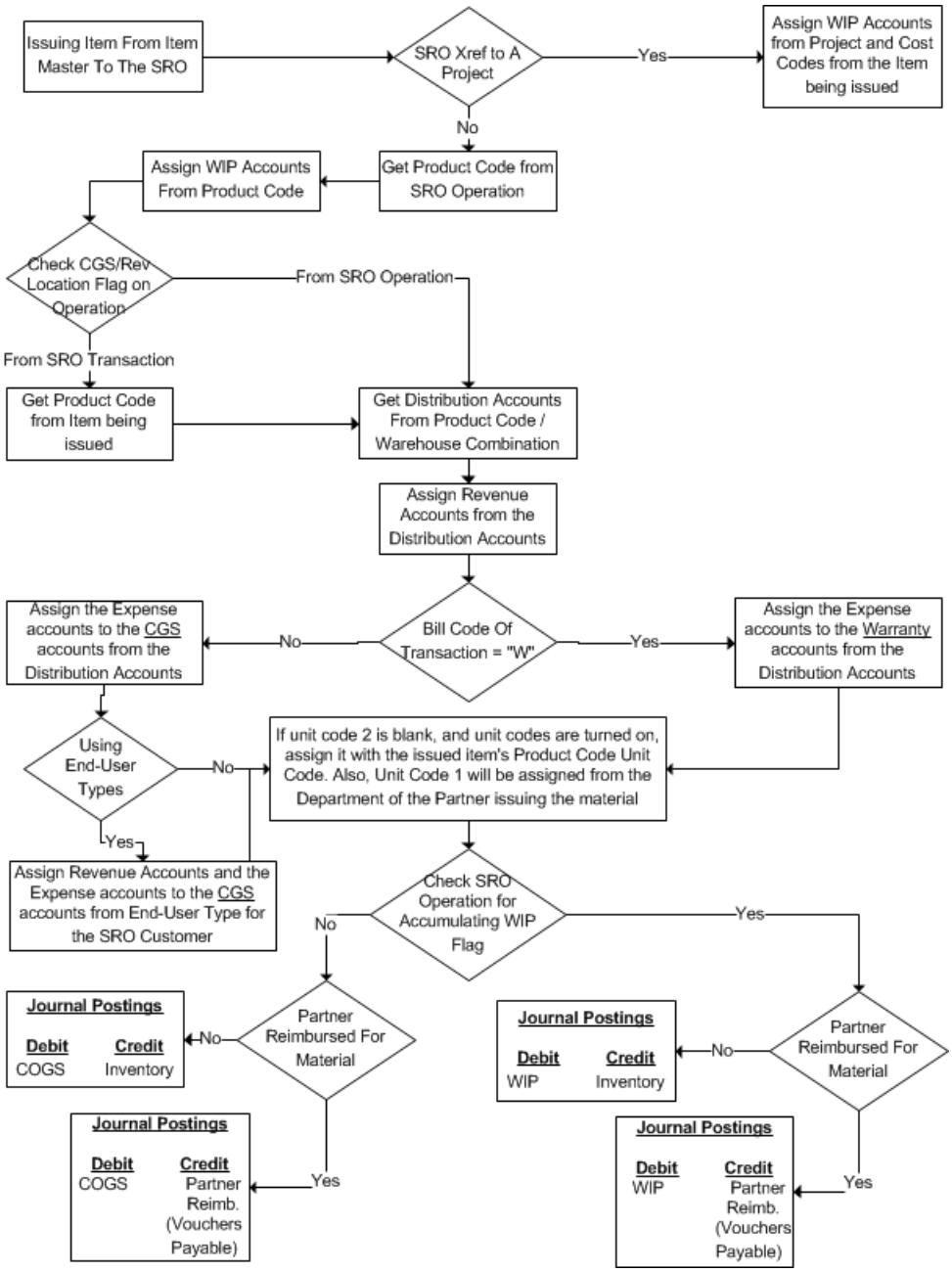
CGS/Revenue Location

The CGS/Revenue Location check box determines whether the system uses account numbers from the product code on the service order operation or from the individual item, work code, and miscellaneous transactions that are posted to the Service Order.

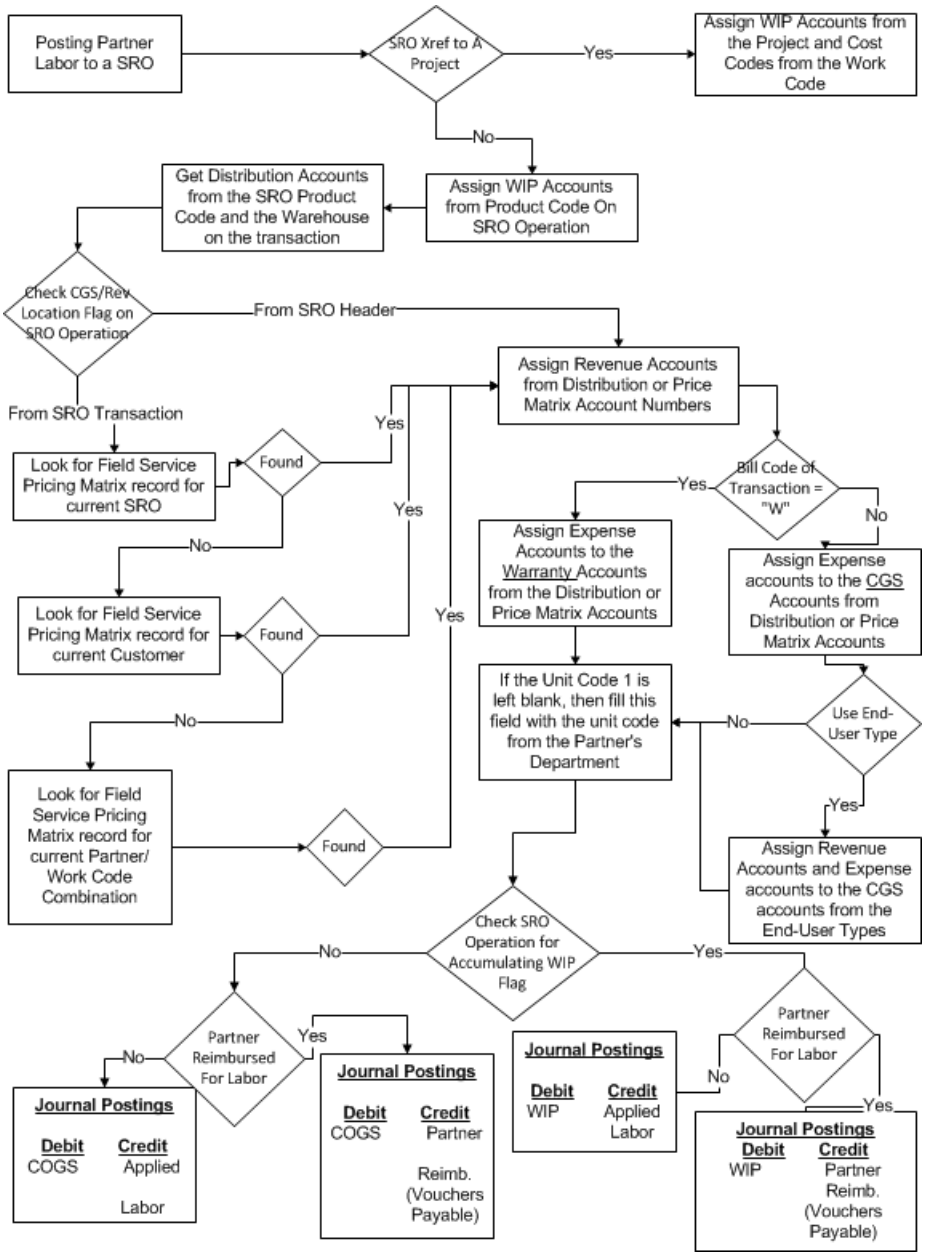
Use the check box on these forms:

- SRO Labor Accounts
- Miscellaneous Codes

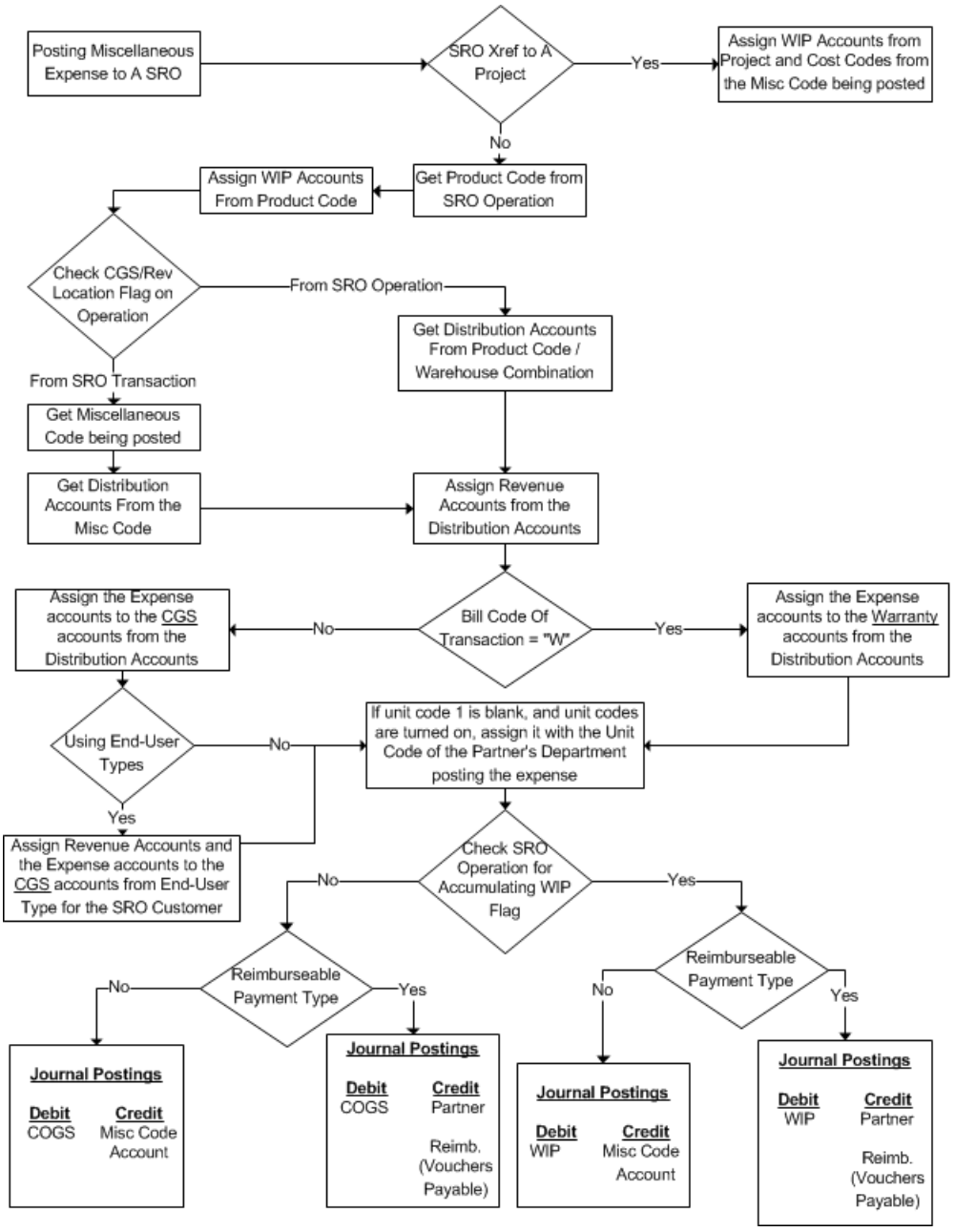
Service Order Material Transactions



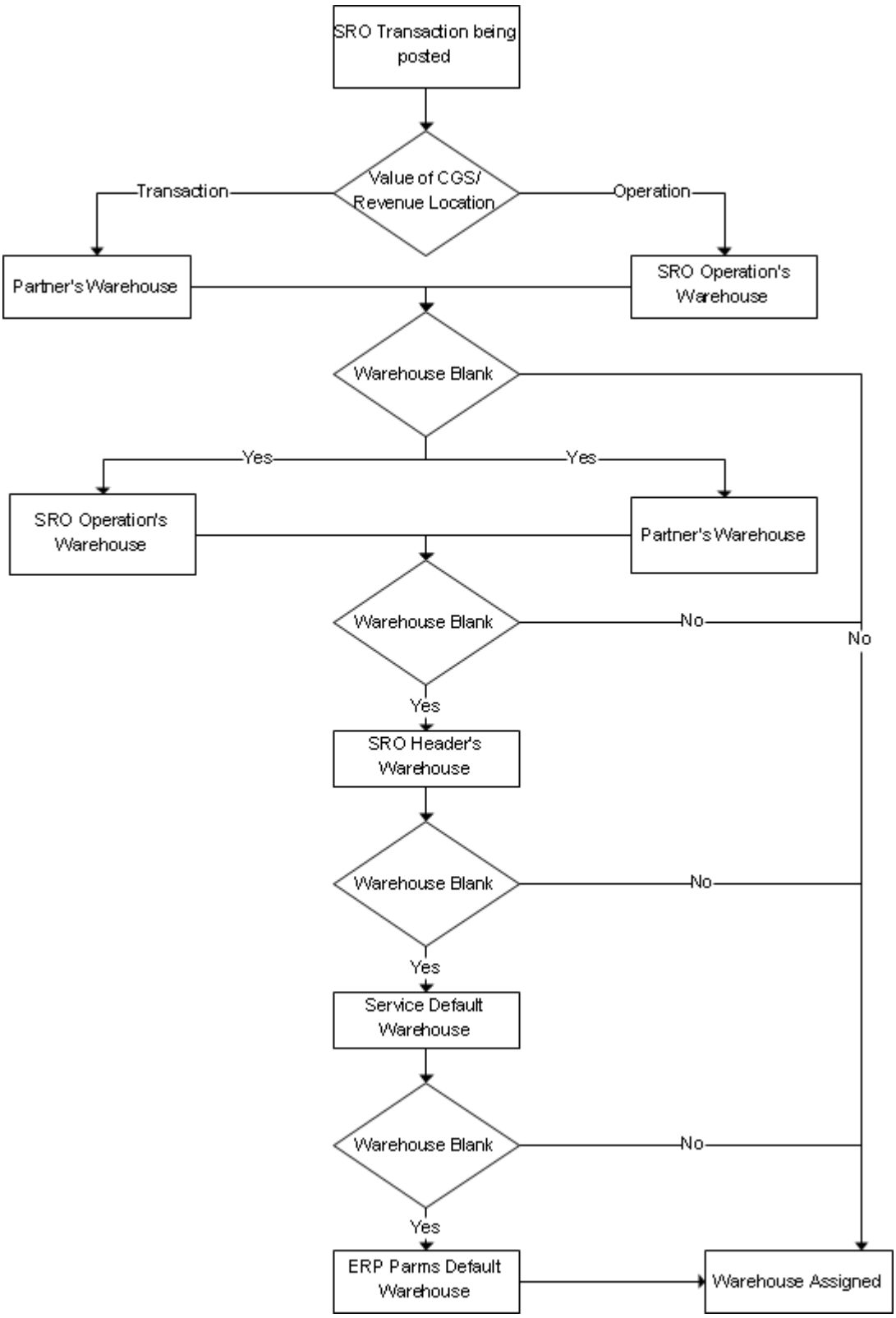
Service Order Labor Transactions



Service Order Miscellaneous Transactions



Service Order Warehouse Acquisition



General Ledger Transactions Overview

This topic explains some of the types of G/L transactions created through Infor CloudSuite Service.

Materials Issued to an SRO

In this case, the SRO item must be in the **Items** form.

When the SRO Accumulate WIP check box is selected, and the partner is not reimbursed for materials:

Debit	Credit
	Items's inventory location material account
	Items's inventory location labor account
	Items's inventory fixed overhead account
	Items's inventory variable overhead account
	Items's inventory location outside account
SRO WIP Labor Acct SRO	
WIP Fixed Overhead Acct SRO	
WIP Variable Overhead Acct SRO WIP Outside Acct	
	Item's Product Code Fixed Overhead Acct
	Item's Product Code Variable Overhead Acct

When the SRO Accumulate WIP check box is cleared, and the partner is not reimbursed for material:

Debit	Credit
	Item's Inventory Location Material Acct
	Item's Inventory Location Labor Acct
	Item's Inventory Location Fixed Overhead Acct

	Item's Inventory Location Variable Overhead Acct
	Item's Inventory Location Outside Acct
SRO COGS Material Acct	
SRO COGS Labor Acct	
SRO COGS Fixed Overhead Acct	
SRO COGS Variable Overhead Acct	
SRO COGS Outside Acct	
	Item's Product Code Fixed Overhead Acct
	Item's Product Code Variable Overhead Acct

When the SRO Accumulate WIP check box is selected, and the partner is reimbursed for materials:

Debit	Credit
	Partner Reimbursement Account (Vouchers Payable)
SRO WIP Material Acct	
SRO WIP Labor Acct	
SRO WIP Fixed Overhead Acct	
SRO WIP Variable Overhead Acct	
SRO WIP Outside Acct	
	Item's Product Code Fixed Overhead Acct
	Item's Product Code Variable Overhead Acct

When the SRO Accumulate WIP check box is cleared, and the partner is reimbursed for materials:

Debit	Credit
	Partner Reimbursement Account (Vouchers Payable)
SRO COGS Material Acct	
SRO COGS Labor Acct	
SRO COGS Fixed Overhead Acct	

SRO COGS Variable Overhead Acct	
SRO COGS Outside Acct	
	Item's Product Code Fixed Overhead Acct
	Item's Product Code Variable Overhead Acct

Labor Transactions Logged against an SRO

These transactions are performed by partners only.

When the SRO Accumulate WIP check box is selected:

Debit	Credit
SRO WIP Labor Acct	
SRO WIP Fixed Overhead Acct	
SRO WIP Variable Overhead Acct	
	Partner Department Labor Expense
	Partner Department Fixed Overhead Labor Applied
	Partner Department Variable Overhead Labor Applied

When the SRO Accumulate WIP check box is cleared:

Debit	Credit
SRO COGS Labor Acct	
SRO COGS Fixed Overhead Acct	
SRO COGS Variable Overhead Acct	
	Partner Department Labor Expense
	Partner Department Fixed Overhead Labor Applied
	Partner Department Variable Overhead Labor Applied

Miscellaneous Transactions Issued To A SRO

When the SRO Accumulate WIP check box is selected:

Debit	Credit
	Miscellaneous Code Account
SRO WIP Material Acct	
SRO WIP Labor Acct	
SRO WIP Fixed Overhead Acct	
SRO WIP Variable Overhead Acct	
SRO WIP Outside Acct	

When the SRO Accumulate WIP check box is cleared:

Debit	Credit
	Miscellaneous Code Account
SRO COGS Material Acct	
SRO COGS Labor Acct	
SRO COGS Fixed Overhead Acct	
SRO COGS Variable Overhead Acct	
SRO COGS Outside Acct	

SRO Invoice Printing

When the SRO Accumulate WIP check box is selected:

Debit	Credit
	SRO WIP Material Acct
	SRO WIP Labor Acct
	SRO WIP Fixed Overhead Acct
	SRO WIP Variable Overhead Acct
	SRO WIP Outside Acct
SRO COGS Material Acct	
SRO COGS Labor Acct	
SRO COGS Fixed Overhead Acct	
SRO COGS Variable Overhead Acct	
SRO COGS Outside Acct	

When the SRO Accumulate WIP check box is cleared:

No Posting Required

SRO Invoice Posting (Posted From A/R)

Debit	Credit
	SRO Sales Account
A/R Account From A/R Parameters	

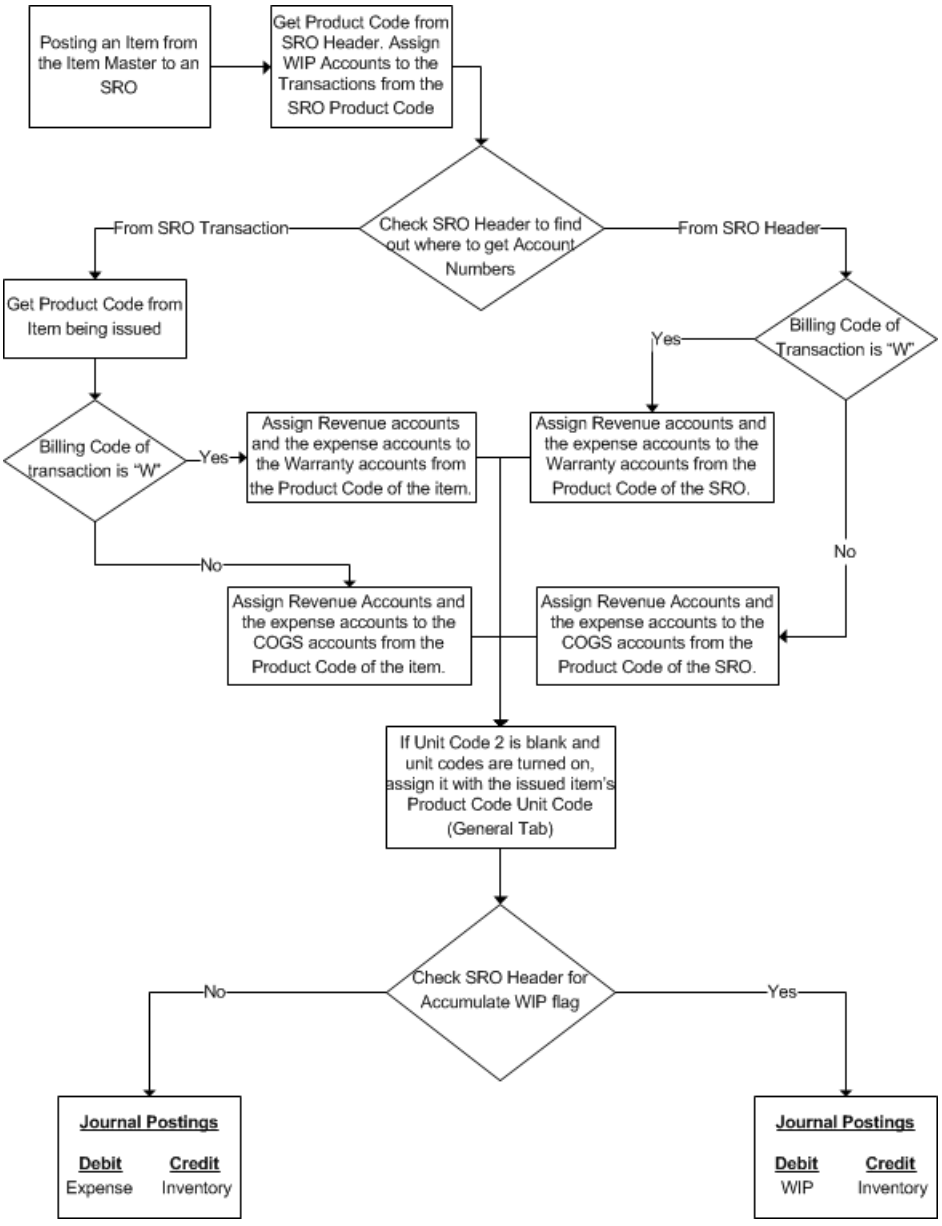
SRO Invoice Posting (Posted From A/R)

Debit	Credit
	SRO Sales Account
A/R Account From A/R Parameters	

Contract Invoice Posting (Posted From A/R)

Debit	Credit
	Contract Product Code Sales Account
A/R Account From A/R Parameters	

Service Order Accumulate WIP Overview



Service Order Non-Inventory Material Purchases

Similar to jobs and projects in standard Infor CloudSuite, the user now has the ability to create and post SRO material transactions that are cross referenced to a PO for items that are not in the item master. In the past, expenses for these types of purchases would have needed to go through the SRO Miscellaneous Transaction posting.

Enter a planned material transaction for an item that does not exist in the item master. Note the **Impact Inventory** check box is set to false and both the cost and price fields have a default value of

zero. After saving the planned material transaction, cross reference it to a Purchase Order. This should create a Planned Purchase Order line for the non-inventory material. When the PO is received, the SRO material transaction will be posted.

Journal Entry

Transaction Description	Debit	Credit
PO Receipt		Vouchers Payable
	G/L Account on PO Line	
Posting Planned Tran		G/L Account on PO Line
	SRO WIP or COGS Account	

Posting SRO Transactions

Using the **Service Order Transaction Posting** form, you can post transactions in batches , and place them on the background queue. To place this utility on the background queue, you must first run a preview, then the background option is enabled from the actions menu.

Follow these steps to post a transaction on the **Service Order Transaction Posting** form:

1 Specify these fields:

SRO

Select the range of SROs to include in the batch.

SRO Line

Specify the range of SRO lines to include in the batch.

SRO Oper

Specify the range of SRO operations to include in the batch.

SRO Type

Select the range of SRO types to include in the batch.

Partner

Select the range of partners to include in the batch.

Oper Code

Select the range of operation codes to include in the batch.

Location

Specify the range of locations to include in the batch.

Transaction Date

Select the range of transaction dates to include in the batch.

Increment Date

Select this check box to list the transaction dates in increments.

Operation Whse

Select the range of operation warehouses to include in the batch.

Transaction Whse

Select the range of transaction warehouse to include in the batch.

Department

Select the range of departments to include in the batch.

2 Select the Transaction Types:

Material

Labor

Miscellaneous

Line Material

3 Specify if the transaction is planned, actual, or both.

- **Planned:** A planned SRO transaction is used to record a plan of the amount of material, labor, and miscellaneous transactions that are required for the SRO.
- **Actual:** Actual transactions have been issued to a SRO.
- **Both:**

4 Select the **Bill Codes**:

Contract

No Charge

Warranty

Recover

List

Custom

5 Specify these fields for generating the batch:

Always

Never

On Error

Order

6 Select **Preview** and click **Process** to preview the results without saving in the database.

7 Select **Commit** and click **Process** to save the results in the database.

8 Click **Select All** to select all the transactions in the grid.

9 Click **Deselect All** to clear the selection from all the transactions in the grid.

Setting Service Distribution Accounts

Use the **Service Distribution Accounts** form to specify accounts based on product code and warehouse. Specify these fields:

Product Code

Select a product code for the account. Product codes are set up to hold general ledger account information for use in posting expenses and revenue for service orders and service contracts.

Warehouse

The warehouse code where the item is located is displayed.

Warranty Accounts

Select the general ledger accounts to be used for posting expenses to an SRO for a unit that is under warranty.

Amortization Accounts

Select the specific account from the chart of accounts to use for the amortization.

Amortize Contracts

Select this check box to include contracts in the amortization process.

Total Periods

Specify the total number of periods that the total amortization amount will be divided between. For the purposes of amortization, each month end date designates the end of period.

Consumable

Select a code from the **Miscellaneous Issues Reason Codes** form to use for the receipt of consumable items following warehouse transfers. Items can be marked as consumable on either the **Service Item/Warehouse Planning** form or the *Item Whse* tab of the **Service Items** form.

Setting Up Labor Accounts for a SRO

Follow these steps to set up labor accounts for a SRO.

1 Open the Service Order Labor Accounts form.

2 Specify this information in the header section:

SRO

Select the unique alphanumeric used to identify the SRO.

Customer

Select a customer.

Ship To

The Customer Ship To location is displayed.

Partner

Select the partner associated with the SRO.

Work Code

Select the code used to represent the type of work that is being recorded to a SRO. Codes are set up and maintained on the **Work Codes** form.

3 In the CGS fields, select the general ledger accounts to be used for posting cost of goods sold expenses for SRO transactions.

4 In the warranty accounts fields, select the general ledger accounts to be used for posting expenses to an SRO for a unit that is under warranty.

5 In the **Sales Discount** field, select the General Ledger account number to use as the default Sales Discount account. When you create an invoice for an order, the discount amount for that order will be applied to this account.

NOTE: This field maintains a G/L account number. The account number you enter in this field must be a valid account number in the Chart of Accounts.

6 In the **Revenue** field, select the general ledger accounts for posting of revenue.

Running the Service Order Estimate Report

Use the **Service Order Estimate Report** to preview or print a list of SRO estimate information. Follow these steps to run the report:

1 Open the Service Order Estimate Report.

2 Specify the range of values to include in the report:

- SRO
- Line
- Operation
- Customer

3 Select the date on which the estimate occurred.

4 In the **Valid Thru** field, select a value to indicate how long the estimate will be accurate.

5 Select **Include Freight/Misc Charges** to include these charges in the estimate.

6 Select **Calculate Tax** to include tax charges in the estimate.

7 Select which notes you want to include in the report:

- Print SRO Notes
- Print SRO Line Notes
- Print SRO Oper Notes
- Print Customer Notes
- Print Internal Notes
- Print External Notes

8 Click **Preview** to preview the results before printing.

9 Click **Print** to generate and print the report.

Running the Service Order Picklist Report

Use the **Service Order Picklist Report** to generate pick lists for SROs. Follow these steps to run the report:

1 Open the Service Order Picklist Report.

2 Select the statuses for the SRO, Line, and Operation.

3 Use the Print Options check box to specify the information to include in the report output.

4 Specify this information:

SRO

Select the range of service request orders to include for the report.

Line

Select the range of SRO lines to include for the report.

Operation

Select the range of SRO operations to include for the report.

SRO Type

Select the range of SRO types to include for the report.

Warehouse

Select the default warehouse to use for the SRO.

Transaction Warehouse

Select the default warehouse to use for the SRO transaction.

Order By

Select whether to sort the output order by transaction number, transaction date, or partner and transaction date.

5 Use these check boxes to include or exclude the related information in the report output:

- Include Posted
- Barcode
- Print Address
- Show All Nettable Locations with QOH

If this check box is selected, then all of the Stockroom Locations where the Quantity on Hand is greater than 0 and the Non-Nettable check box is cleared on the **Item Stockroom Locations** form are included in the report. If this value is not checked, only those stockroom locations required to fulfilled the quantity order based on location rank is included.

- Include Serial Numbers
- Display Report Header

6 Click **Preview** to view the report output before printing.

7 Click **Print** to run the report and print the output.

Running the Service Order Loaners To Be Shipped Report

Use the **Service Order Loaners To Be Shipped Report** to preview and print a list of the SRO loaners that are to be shipped. Follow these steps to run the report:

1 Launch the Service Order Loaners To Be Shipped Report.

2 For these fields, select the range of values to include in the report:

- SRO
- Line
- Oper
- Bill Manager
- Customer
- Unit
- Item
- Start Date
- Open Date
- End Date
- Due Date

3 Click **Preview** to view the report output.

4 Click **Print** to run the report and print the output.

Reviewing Warehouse Replenishment Planning

The **Warehouse Replenishment Planning** form shows the output from the **Warehouse Replenishment Planning Generation**. Use the buttons on the form to review the output and create service orders.

1. Click **Warehouse Replenishment Planning Generation** to launch the Warehouse Replenishment Planning Generation utility.
2. Click **Preview** to populate the grid with a list of tentative orders.
3. Click **Select All** to mark all the records.
4. Click **Deselect All** to clear all the records.
5. Click **Process** to process the records and create service orders.
6. Specify this information on the Filter tab:
   - Range of warehouses
   - Range of items
   - The number of days to plan
7. Select the source type, which determines how the item is replenished:
   - **Purchased**: Purchase orders are used to handle replenishment.
   - **Transferred**: Transfer orders are used to handle replenishment.

Generating the Service Order Planned Material Requirement Report

Use the **Service Order Planned Material Requirement Report** to preview and print an output related to planned material transactions.

The report shows all materials needed by planned material transactions within the input ranges. For these materials, it shows all of the warehouses containing them as well as the available quantities of each. If a planned material transaction is cross-referenced to a purchase order, transfer order, job, project, or RMA, the report also shows the quantity available through the cross-reference.

1. Open the Service Order Planned Material Requirement Report form.
2. Specify the information to include in the report:
   - Range of service request orders
   - Range of SRO lines
   - Range of SRO operations
   - Range of customers
   - Range of product codes

- Range of SRO line due dates

3 Specify these options:

Include Posted Planned

Select this field to include planned transactions that are posted to SROs in the report. Clear this field to include only unposted planned transactions.

Include SRO Demand Only

Select this field to include in the report only service orders where the **Include Demand** flag is selected on the **Service Orders** form. If this field is cleared, SROs are included regardless of the setting.

Show Shortages Only

Select this field to include only SROs that have planned material transactions without enough quantity on hand to fulfill them.

Sort By

Specify whether to sort the output based on Item or SRO.

4 Click **Preview** to view the report output.

5 Click **Print** to generate the output and print the report.

Designating Serial Numbers for Items on a Material Transaction

Use the modal **Service Serials** form to designate serial numbers for items on a material transaction. To launch this form, click **Serials** on the **Service Order Transactions** form.

1 Specify these fields:

Target Qty

The value of the quantity specified for the material transaction is displayed. This value is the quantity of serial numbers that must be generated or selected for the item.

Generate Qty

The default value is the **Target Qty**. You can specify a different quantity. This field indicates the number of serial numbers you want the system to generate for this item during this transaction. The number to be generated must be less than the Target Qty. After a generation or selection has been performed, this value is reset to 0.

S/N Prefix

Specify a prefix to be appended to the start of the serial number that is generated.

2 If new serial numbers are required for a transaction and the Generate Qty value is greater than 0, click **Generate** to generate the specified quantity of new serial numbers. These serial numbers will use any specified prefix. Otherwise, either click **OK** to save your changes without generating, or click **Cancel** to not save your changes.

Service Commissions Overview

Use Service Commissions to pay commissions for Service Request Orders and Service Contracts through the commission system that exists within Infor CloudSuite for customer orders.

Salesperson Commission Setup

Commission percentages are established by using the commtab table. This table has two primary fields, Salesperson and Product Code, along with a set of amount fields that are defaulted to commission percentage.

Service Order Commissions

Only one salesperson will be paid for SRO and contract records.

Commission Calculation

For customer orders, as an invoice is posted the system loops through the co_sls_comm records and a commdue record is created for each one based on the following calculation: Total price of the line item (without taxes) * Comm Rev Percent * Comm Percent If the commission percent is left blank then the system will use the product code on the line item along with the salesperson to acquire the percentage. If there is not combination found then no commission is included for that specific line item.

As a service request order or contract invoice is posted, the system will check each line to determine if a commission has been setup based on the product code from the SRO operation or contract header. If yes then a commission due record will be created based on the following calculation: Commission Amount = Total price of the line item (without taxes) * Comm Percent Surcharges and waiver fees are ignored. Only line item values will be considered.

Commissions Due

As the Customer Order commdue records are created, a flag on the Order Entry Parameters form determines the amount of commission that is due when the invoice is created. The flag is labeled "Commissions Due on Payment". If this flag is enabled then the commdue amount is set to 0 at time of invoicing and then is not updated until payment has been received. If disabled then the commission amount is updated immediately.

Service Order Commissions Due are similar to the customer order functionality, except that instead of using the Order Entry Parameters form to determine when the commission is due to be paid, the system will use the new parameters that have been added to the Service Parameters form. For SROs this flag is labeled Pay SRO Commissions on the Service Order tab. For contracts this flag is labeled Pay Contract Commissions on the Contract Parameters tab. Because SRO and contract invoices both flow through the standard Infor CloudSuite A/R tables, the commission due on payment logic will continue to work. Therefore when the Pay SRO Commissions and Pay Contract Commissions flags are set to Payment, indicating that the commission is really due upon receipt of the invoice payment, the order entry parameter flag Commission Due on Payment should also be enabled. That way the commissions will be due for all salespersons when payments are processed for customer orders, service request orders, and service contracts.

Commission Reimbursement

For both customer and service orders, paying the salesperson is a manual process. There is no direct tie into the payroll system or the A/P system for outside sales people. Logical steps that would be taken might be the following:

1. Use the Commissions Due form to display the commissions that are either pending or due to be paid and make any amount changes necessary.
2. Use the Sales Commission by Salesperson Report form to see what is due to be paid.
3. Inform the payroll or A/P department of the amounts that need to be paid.
4. Use the Commissions Status Change Utility form to update the commission as well as record the date of payment.

Typical Flow of Forms Used for Commissions Processing

- Order Entry Parameters, Service Parameters
- Salespersons
- Product Codes
- Commission Table Maintenance
- Customer Orders, Service Orders, Service Contracts
- Customer Order Lines, Service Order Lines, Service Contract Lines
- Service Order Operations
- Service Order Transactions
- To Be Invoiced Report, Service Order To Be Invoiced Report, Contracts To Be Invoiced Report
- Order Invoicing/Credit Memos, Service Order Invoicing, Service Contract Invoicing
- Invoices, Debit and Credit Memos
- Invoice Posting
- A/R Payments
- A/R Payment Posting
- A/P Payments
- A/P Payment Posting
- A/P Check Printing/Posting
- Commissions Due
- Sales Commission by Salesperson Report
- Commission Status Change Utility

Handling a Support Call that Requires a Service Order

After being assigned as the own of an incident, follow these steps to handle a support call that requires a service order:

1. Launch the **Incidents** form to obtain information about the issues.
2. Cross reference the incident to a service request order to track the material, labor, and miscellaneous expenses and to bill the customer.

   On the **Status tab**, change the Destination to SRO.

   Click **Save**.

   Click **Destination** to launch the **Service Order Quick Create** form. Follow the steps in Quick SRO Create: Copying SRO Information from an Existing SRO to create the new SRO.
3. Click **Destination** to launch the **Service Orders** form and filter for the new SRO.
4. On the **Lines/Operations** tab, click **Transactions** to launch the **Service Order Transactions** form. Specify material, labor, and miscellaneous transactions for the SRO.
5. On the **Service Orders** form, set the Status to Open, if it is not already set.
6. Run the **Service Order to be Invoiced Report** for the new SRO. Follow the steps in Running the Service Order to be Invoiced Report.
7. Run the **Service Order Invoicing** form. Follow the steps in Running Service Order Invoicing.

Processing a Warranty Claim

Follow these steps to process a warranty claim performed by a partner employed by the manufacturer:

1. Launch the **Service Orders** form.
2. Click **New** to create a new SRO.
3. In the SRO Type field, select Warranty. The Product Code and Billing Code associated to the warranty SRO Type are used.
4. On the **Customer tab**, select the Customer who has requested the work. The Billing Manager, Salesperson, Terms Code, Price Code, and tax information associated to the customer are populated.
5. Follow the steps in Adding and Updating a Service Order to specify any additional information.
6. On the **Lines/Operations** tab, click **Transactions** to launch the **Service Order Transactions** form.

   Follow the steps in Adding SRO Transactions to enter all the transactions that were used on the warranty claim.

   In the Partner ID field, select a partner with the Reimburse Material and Reimburse Labor check boxes cleared.

7 On the **Service Orders** form, verify that the new operation has a status of Invoice. If it is not set to Invoice, click **Update**.

8 On the **Billing** tab, click **Orders To Be Invoiced Report** to launch the **Service Order To Be Invoiced Report**. Follow the steps in Running the Order To Be Invoiced Report for the new SRO.

9 On the **Billing** tab of the **Service Orders** form, click **Order Invoicing** to launch the **Order Invoicing** form.

10 After invoicing the SRO, an A/R invoice record is posted.

Warranty Claims Submitted for Reimbursement

To process a warranty claim submitted by a contracted partner who has performed the service and is requesting reimbursement, follow the steps above. After invoicing the SRO, follow these steps to reimburse the partner:

1 Launch the Partner Reimbursements form.

2 Select the Partner ID associated to the warranty claim.

3 In the grid, select the items to be reimbursed, or click Select All.

4 Click Process to launch the Partner Reimbursement Process modal form.

5 Optionally, specify a Description for the reimbursement.

6 Click Process to run the reimbursement.

Shipping Parts Associated with a SRO

You can create packing slips from posted and unposted transactions for shipping service orders. Follow these steps to generate a packing slip and complete the shipping process for a service order:

1 Launch the **Service Order Packing Slip Generation** form to create new pre-ship or post-ship packing slips.

2 Specify these fields:

Warehouse

Select the warehouse code for the SRO.

Pack Date

Select date that you want to print on the **Order Packing Slip**. The current system date is the default value.

All Ship Tos

Select this check box to generate packing slips for all SROs. Clear this check box to generate packing slips for a specific Ship To location.

SRO

Select the SRO to include on the packing slip.

Line

The number assigned to the SRO line is displayed.

Operation

The operation number associated with the SRO line is displayed.

Pre-Ship

Select this check box to show the unposted customer shipment transactions for the SRO.

Post-Ship

Select this check box to show the posted customer shipment transactions for the selected SRO.

3 Click **Process** to generate the packing slip.

4 Click **Process/Print** to generate the packing slip and launch the **Service Order Packing Slip** form.

5 On the **Service Order Packing Slip** form, specify these fields to preview or print the packing slip report:

Pack Slip

Select a range of packing slip numbers to include.

Pack Date

Select a range of dates to include only packing slips that fall within that range.

Line

Customer

Select the range of customers to include for the report.

Print Options

Select the options that you want to print on the report.

6 Click **Preview** to preview the results before printing.

7 Click **Print** to print the report.

8 Launch the **Service Order Packing Slip Maintenance** form to ship the packing slip. Specify these fields:

Packing Slip

Select the system-generated packing slip number.

Add Button

Click this button to create a new packing slip via **Packing Slip Generation**.

Warehouse

Select the warehouse code for the SRO.

Pack Date

Select date that you want to print on the **Order Packing Slip**. The current system date is the default value.

Customer

Select a customer.

Drop Ship

See the online help.

Drop Seq

Specify the drop-ship sequence number, if any.

Weight

Specify the value of the total weight for the line items on the **Order Packing Slip**.

Ship Via

The ship via code associated with the Ship Via description is displayed. The default value displays from the Order header but can be overwritten.

 # Packages

Specify the number of packages that will appear on the packing slip.

Print Button

Click this button to print the report.

Pick List Button

Click this button to launch the **Service Order Picklist Report** form.

Add Lines Button

Click this button to add the line to the packing slip via **Packing Slip Generation**.

Serial Button

Click this button to launch the **Serials** modal form. This form can be used to view or generate serial numbers for the associated item.

9 Use these buttons to ship or un-ship the packing slip:

Ship Line Button

Click this button to ship the currently selected line.

Un-Ship Line Button

Click this button to un-ship the currently selected line.

Ship All Button

Click this button to ship all order lines.

Un-Ship All Button

Click this button to un-ship all order lines.

Drop Shipments for SROs

Overview

Material related to service work can be shipped to a different destination than the customer location associated to the service order. This provides flexibility for a technician to specify where they would like each part to be shipped.

Even though a customer or consumer has requested service, the material needed to fulfill the request may need to be shipped to a unique address. Use the Drop Ship Type and Drop Ship Number/Sequence with the SRO structure when using an alternative address.

Drop Shipment Configuration

The Drop Ship location for a Service Request Order (SRO) can be set at two levels:

- **Entire Service Order**: If the material on the entire SRO is to be sent to a location other than the customer ship to, specify the drop ship on the SRO Header. Use the Drop Ship fields on the **Service Orders** form to quickly filter. Use the Drop Ship button on the Customer tab to launch the **Service Order Drop Ship To** modal form and display the full Drop Ship address.
- **Transaction Specific**: You can configure individual transactions to have the material shipped to a location different from the rest of the service order. The Drop Ship fields are displayed in the grid of line and material transactions. Use the Drop Ship button to launch the **Service Order Drop Ship To** modal form to display the full Drop Ship address.

Drop Shipment Supported Types

You can store company address information in numerous areas of the system. Use the SRO Drop Shipment functionality to specify multiple location types:

- **Customer**: The Customer master numbers and sequences are provided as valid shipping destinations.
- **Consumer**: If the system is configured to use separate consumers, you can select the consumer number and sequence (otherwise the customer list is displayed).
- **Partner**: The address of the employee, vendor, or customer associated to the partner is used as the shipping destination.
- **Drop Ship To**: Generic shipping locations can be entered and saved on the **Service Order Drop Ship To** form. This option allows selection of the shipping destination from that list.

SRO Shipment Listing

Use the report options to specify the address you want to print on the paperwork. Choose from the customer of the order, the consumer, or the drop ship location.

SRO Packing Slip

Use the **Service Order Packing Slip Generation** utility to process and print packing slips by specific Drop Ship type and location. The **Service Order Packing Slip Maintenance** form shows the full address of the Drop Ship location when it exists. The **Service Order Packing Slip** report shows the appropriate shipment address, using a page break between different packing slip destinations.

Service Console

The Drop Ship type and numbers are displayed in the SRO and Transaction areas of the Console when the Drop Ship Type has a value other than None.

Service Order Template

The Drop Ship type and numbers have been added to set up service order templates specific to a drop ship destination.

Mobile

For customers who use the Mobile Service solution and want to enable Drop Ship functionality, RSM UETs can be configured to store and pass these values.

Processing a Spare Parts Order

Many manufacturers need to track the materials added to a specific parent item. The spare parts functionality enables users to handle the orders for these spare parts. Follow the steps in Setting Up Service Order Types to set up a spare parts type on the **Service Order Types** form. The two methods for handling spare parts orders are described below.

Spare Parts Ordered for an Existing Unit

Use this method when an existing unit needs to be serviced or upgraded and the manufacturer wants to record the parts and the unit. In the scenario below, a SRO line and material transaction are created to record the service and spare parts needed for a unit. Follow this example when ordering spare parts for an existing unit:

1. Launch the **Service Orders** form and follow the steps in Adding and Updating a Service Order to add a new service order.
2. Select the spare parts SRO type.

3 On the **Lines/Operations** tab, click **Lines**.

Follow the steps in Adding SRO Lines to create a SRO line item for the parent unit.

4 Click **Operations** and follow the steps in Adding SRO Operations to create a SRO operation for the parent unit.

5 Click **Transactions** and follow the steps in Adding SRO Transactions to create a new transaction for the new SRO.

6 Follow the steps in Running the Service Order To Be Invoiced Report and Running SRO Invoicing to create an invoice record and update the customer balance.

Spare Parts Ordered for Inventory

Use this method when spare parts are ordered to restock inventory. In the scenario below, a SRO line is created to generate the order for the spare parts. Follow the example when ordering spare parts to restock inventory:

1 Launch the **Service Orders** form and follow the steps in Adding and Updating a Service Order to add a new service order.

2 Select the spare parts SRO type.

3 On the **Customer** tab, select the customer requesting the spare parts.

4 On the **Lines/Operations** tab, click **Lines**.

Follow the steps in Adding SRO Lines to create a SRO line item for the parent unit.

5 Click **Transactions** and follow the steps in Adding SRO Transactions to create a new transaction for the new SRO.

6 Follow the steps in Running the SRO To Be Invoiced Report and Running Service Order Invoicing to create an invoice record and update the customer balance.

Handling RMAs Through Service Orders

While Return Material Authorizations (RMAs) are typically handled through customer orders, you can also manage them through service orders. The advantage of using a service order is that the system tracks the components that are removed and replaced on the unit configuration. Follow these steps to handle a RMA through a service order:

1 Launch the **Service Orders** form and follow the steps in Adding and Updating a Service Order to add a new service order.

2 Save the new service order and notify the customer of the SRO number. This number is used as the RMA number.

3 On the **Lines/Operations** tab, click **Lines**.

Follow the steps in Adding SRO Lines to create a SRO line item for the parent unit.

4 Click **Operations** and follow the steps in Adding SRO Operations to create a SRO operation for the parent unit.

5 Click **Transactions** and follow the steps in Adding SRO Transactions to create a new transaction for the new SRO.

6 When the part is received by the customer, post the return transaction on the **Material** tab of the **Service Order Transactions** form.

7 Follow the steps in Running the Service Order To Be Invoiced Report and Running Service Order Invoicing to create an invoice record and update the customer balance.

Handling Advance Exchanges and Loaners

You can handle advance exchanges at the unit level and the component level. You must set up a SRO type for advance exchanges before processing an exchange. Follow these steps to set up the advance exchange SRO type:

1 Launch the **Service Order Types** form to create a new SRO type.

2 In the **SRO Type** field, specify **AdvExch**.

3 In the **Description** field, specify **Advance Exchange**.

4 In the **Product Code** field, select the appropriate account.

5 Save the new SRO type.

6 Launch the **Service Order Templates** form and filter to the new AvcExch SRO.

7 On the **Lines/Operations** tab, click **Lines** to launch the linked **Service Order Lines** form.

8 Add a new line for the item being sent to the customer, and specify these fields:

Quantity

Specify **1**. After the SRO is created, the system updates this value.

Bill Code

Select **List**.

Line Type

If not already set, select **AdvExch**.

9 Save the new line.

10 Add a new line for the item being returned, and specify these fields:

Quantity

Specify **-1** to show that an item is going to be received by a customer. After the SRO is created, the system updates this value.

Bill Code

Select **List**.

Exchange Days

Specify the number of days the customer has to exchange the item for full credit.

Line Type

If not already set, select **AdvExch**.

Unit Exchanges

Follow these steps to complete an advance exchange for a unit:

1. Launch the **Incidents** form.
2. Follow the steps in Adding an Initial Request for Service (Incident) to create a new incident.

   Specify the fields based on the associated customer and item being exchanged.
3. On the **Status** tab, select SRO in the **Destination** field and save.
4. Click **Destination** to perform a cross-reference for the Advance Exchange SRO type.
5. Notify the customer of the SRO number that was generated by the system. This number is used as the RMA number.
6. Optionally, click **Destination** to launch the **Service Orders** form for the newly created SRO.
7. Launch the **Service Order Transactions** form and enter the parts that need to be sent to the customer.

   Use the new SRO number and follow the steps in Adding SRO Transactions.
8. After receiving the items returned by the customer, enter the returned items on the **Service Order Transactions** form.

   The system compares the transaction date with the Exchange Date to determine if the item was returned on time. If the transaction date is after the Exchange Date, the Bill Code is set to No Charge and the customer is not credited for the return.
9. Follow the steps in Running the Service Order To Be Invoiced Report and Running Service Order Invoicing to create an invoice record and update the customer balance.
10. Optionally, run the **Service Order Outstanding Exchanges Report** to generate a list of all the advance exchanges that are currently overdue.

Component Exchanges

Follow these steps to complete an advance exchange for the components of a unit:

1. Launch the **Service Orders** form and follow the steps in Adding and Updating a Service Order to create a new SRO.
2. In the **SRO Type** field, select the spare parts time.

3 On the **Customer** tab, specify the fields based on the customer associated to the exchange.

4 Save the new SRO.

5 Notify the customer of the SRO number that was generated by the system. This number is used as the RMA number.

6 On the **Lines/Operations** tab, click **Lines**.

Follow the steps in Adding SRO Lines to create a SRO line item for the parent unit.

7 Click **Operations** and follow the steps in Adding SRO Operations to create a SRO operation for the parent unit.

8 Click **Transactions** and follow the steps in Adding SRO Transactions to enter the transactions that were used on the parts order.

In the **Trans Type** field, select **E** for exchange.

The system automatically creates a planned transaction for the part to be returned.

9 When the part is received from the customer, post the Return transaction to the SRO on the **Service Order Transactions** form.

10 Follow the steps in Running the Service Order To Be Invoiced Report and Running Service Order Invoicing to create an invoice record and update the customer balance.

Service Orders Involving a Loaner

Sometimes a customer needs a loaner item while service is being performed on a defective item. Follow these steps to create a SRO type for a loaner item:

1 Launch the **Service Order Types** form to add the loaner SRO type.

2 In the **SRO Type** field, specify **Loaner**.

3 In the **Description** field, specify **Service with a loaner**.

4 In the **Product Code** field, select the appropriate account.

5 Save the new SRO type.

6 Launch the **Service Order Templates** form and filter to the new Loaner SRO.

7 On the **Lines/Operations** tab, click **Lines** to launch the linked **Service Order Lines** form.

8 Add a new line for the item being sent to the customer, and specify these fields:

Quantity

Specify **1**. After the SRO is created, the system updates this value.

Bill Code

Select **List**.

Line Type

If not already set, select **Loaner**.

9 Save the new line.

10 Add a new line for the item being returned, and specify these fields:

Quantity

Specify **-1** to show that an item is going to be received by a customer. After the SRO is created, the system updates this value.

Bill Code

Select **List**.

Exchange Days

Specify the number of days the customer has to return the item for full credit.

Line Type

If not already set, select **Loaner**.

11 Follow the steps for a unit exchange to create an incident for the loaner. Be sure to specify the newly created loaner SRO.

12 Follow the steps in Handling a Support Call that Requires a Service Order to record the material, labor, and miscellaneous expenses.

13 Optionally, run the **Service Order Outstanding Loaners Report** to track where loaner material is located.

About Service Bay Repair vs. Depot Repair

Using both SRO lines and SRO operations, the system can handle service bay repair and depot repair. Service bay repairs typically involve work on large items, such as buses, boats, and other capital equipment. These service orders are generally set up with one line item, but for many operations. Depot repairs typically involve work on a large number of small items. These service orders are generally set up with multiple line items and few operations.

About Service Order Planned Transactions

For each service order, you can set up planned material, labor, and miscellaneous transactions. You can use planned transactions in these cases:

- Create an estimate to give to a prospect.
- Print the **Service Order Pick List Report** for pulling stock from inventory.
- Use as a work order for a technician to record back-ordered materials.

Run the **Service Order Planned vs. Actual Report** to do an analysis of planned versus actual costs and revenue.

Creating a Maintenance Order for an Internal Unit on a Shop Floor Machine

Follow these steps to create a maintenance order for an internal unit associated with machines used on the shop floor:

1. Launch the **Units** form to add a new unit.
2. In the **Unit** field, specify a value to describe the machine represented.
3. Select an **Item**. We recommend that you set up a different item for each machine. This way, you can set up planned maintenance schedules for each machine.
4. On the **Maintenance** tab, select the **Asset Number** and **Work Center** for the machine this unit represents.
5. Maintenance events to be performed are displayed in the grid on the **Maintenance** tab.
6. Click **Copy Maint** to copy the planned maintenance schedule for the item associated to the unit.
7. Run the **Service Order Automatic Generation Utility** for the maintenance records. New SROs are generated for each event that is overdue.
8. Launch the **Service Orders** form and filter for one of the SROs created by the **Service Order Automatic Generation Utility**.
9. The created SRO has a line item for the machine that requires service, and operations for each of the needed tasks.
10. Launch the **Service Order Transactions** form and add a new transaction for the SRO, line, and operation.

    Follow the steps in Adding SRO Transactions.
11. Follow the steps in Running the SRO To Be Invoiced Report and Running SRO Invoicing to create an invoice record and update the customer balance.

Closing a Service Order

Use the **Service Order Close Utility** to close multiple SROs and change their status to closed.

1. To close a SRO, specify these fields on the utility:

   SRO Number

   Select the range of service request orders to include in the utility.

   SRO Type

   Select the range of SRO types to include in the utility.

   Billing Manager

   Select the range of billing managers to include in the utility.

Date Opened

Select the range of SRO open dates to include in the utility.

Close Only Billed Complete

Select this check box to close only SROs, lines, and operations where the billing status is complete.

All Lines Must Be Shipped

If you select this check box, all SRO line material must be shipped before the utility will close the SRO.

All Actual Transactions Must be Posted

If you select this check box, all actual transactions must be posted before the utility will close the SRO.

All Planned Transactions Must be Posted

If you select this check box, all planned transactions must be posted before the utility will close the SRO.

Skip Operations With Unrelieved WIP

Select this check box to omit operations with unrelieved WIP from the process.

2 Click **Preview** to preview the output before running the utility.

3 Click **Process** to run the utility.

4 Click **Commit** to commit or post the input information on the form to the system.

Adding Service Level Agreements

Service level agreements (SLAs) determine to what level a service should be performed based on a contract.

SLAs are managed with priority codes. Follow the steps in Setting Up Priority Codes that Establish Response Times for Incidents to set up priority codes.

You can assign priority codes on the **Service Contracts** form, and **Service Types** form.

Setting Up Labor Costs for a SRO

Use the **Service Order Labor Costs** form to set up the labor costs for a SRO. Specify these fields on the form:

SRO

Select the unique alphanumeric used to identify the SRO.

Cust Num

Select the customer number.

Ship To

The Customer Ship To location is displayed.

Partner ID

Select the partner associated with the SRO.

Work Code

Select the code used to represent the type of work that is being recorded to a SRO. Codes are set up and maintained on the **Work Codes** form.

Cost

Specify the cost per hour for the specified SRO/Customer/Partner/WorkCode combination. This value is used by default on the SRO transaction.

Entering Service Order Deposits

Use the **Service Order Deposits** form to enter deposits from customers for SROs.

1 Specify this information:

- SRO
- Customer
- Bank code

The account in which the customer's checks are deposited is displayed.

- Check number
- Date the deposit was received

2 If a promotional discount is due for the SRO or customer, specify the amount.

3 Specify the account to credit or debit.

4 Save your changes.

Reviewing SRO Working Status History

You can review the history of all changes to this service order's working status, for example, to see if the service order was on hold at any point or if it was opened and closed more than one time. To do this, click **History** on the General tab of the **Service Orders** form. The **Service Order Working Status History** form is displayed. Whenever the working status code was changed, a snapshot of other information was stored, such as the lead partner, date of the change, and user. If a change was made from Service Management Mobile and GPS is enabled, the GPS location and date are

also saved, so you can plot the location where the status was changed on a Microsoft MapPoint map.

Using Multiple Customer Item Numbers with Service Orders

When a material transaction is entered, the user has the ability to select from a list of associated customer item numbers.

Customer/Item Cross Reference

The Customer Item Cross Reference functionality can store multiple customer items and pricing for a given customer item. The **Incidents** form, **Service Console**, **Units** form, **Service Order Lines** form, **Service Order Material Data Collection** form, and **Service Order Transactions** form allow the creation of Customer/Item records on the fly. When a customer is specified on one of those forms, and the user populates the **Customer Item** field with a value that does not already exist, a customer item record is created. By selecting a customer item on the **Service Order Transactions** form, the system retrieves the appropriate price for a given customer/item combination.

If the **Used Planned Pricing** check box is selected, the SRO ignores the customer item pricing matrix.

Copying and Reporting

The **Service Order Quick Create** utility, **Service Order Automatic Generation Utility**, and **Multi-Site Service Order Copy** utility support the copy of customer items from the source record to the destination record.

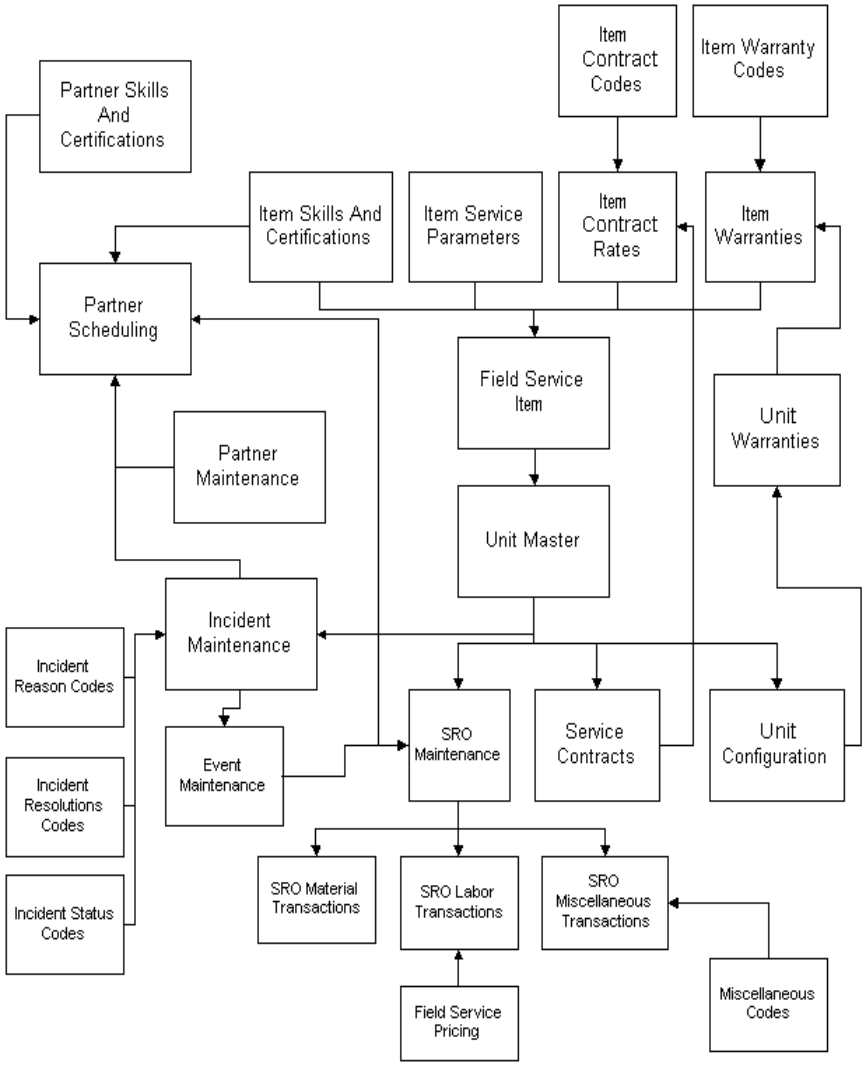
NOTE: When a SRO is created from an incident, the customer item of the incident is assigned to the customer item of the SRO line.

The **Service Order Packing Slip** form, **Service Order Invoicing** form, **Service Order Shipment Listing** form, and **Service Order Estimate Report** form display the customer item value when it is specified.

Units

About Items, Units and Servicing

Your company might service items that you manufacture, as well as items manufactured by other companies. The Service module supports this, through these forms that extend the standard application **Items** functionality that allow you to record service characteristics of items and related information, for example, lists of skills that allow partners to work on certain items:



Units

Units are serial-tracked items that your company services. A unit may or may not exist in the standard Infor CloudSuite serial master. Units can be added to the system in several different ways:

- Run utilities that create the unit upon the completion of a job when the finished goods are put into inventory. These utilities can be run every night on the Background Queue, to pick up any new units that have been created during the previous day.
- Select the **Auto Create Unit on Shipment** field in the **Service Parameters** form to automatically create new units whenever a serial-tracked item is shipped on a customer order.
- Create a unit manually with the **Units** form.

Configuration Tracking

You can store information about the parts that make up a unit in a structure called the *unit configuration*. The unit configuration is useful if your company manufactures equipment that consists of subcomponents that can be replaced later. Each component can have its own serial number and warranties associated with it. The installed and removed date is recorded at the component level, so users can view the As Built, As Is and As Was for any date.

Warranty Tracking

Warranties are tracked at both the unit and the component level. For example, a car has one warranty, but the tires on the car have a separate warranty. The system tracks whether a warranty is given by the manufacturer or through the vendor for purchased parts existing on a unit. You can set warranty durations by both expiration date and a meter amount such as miles, impressions, cycles, etc.

Registration History

Infor CloudSuite Service tracks each owner of a unit, with the date ownership was taken by the consumer. Both the Sold To customer and the end consumer are recorded, so if the unit is registered or transferred, the system can record the event.

Setting Up the System for Units

To set up the system so that you can add and configure units for servicing:

1 On the **Service Parameters** form, set up the parameters on the Units and Other tabs as described in Setting up Service Parameters.

2 On the **Unit Status Codes** form, specify this information:

Unit Status Code

Specify a code that describes the status of the unit for different stages of servicing, for example, In Shop, Under Repair, Rented, etc.

Description

Specify a description of the status code.

Down/Unavailable

Select this field if the unit should not or cannot be used when in this status. This field is informational only and does not trigger any subsequent process.

3 On the **Warranty Codes** form, specify this information:

Warranty Code and **Description**

Specify a unique code and description that identify the warranty. For example, **50K** = **50,000 mile**, or **Parts-1** = **One year parts**.

Warranty Type

Specify who owns the warranty: User, Vendor, or Manufacturer.

Date Duration

Specify the term of the warranty. Use a number in the first field and then select an increment: Day(s), Month(s), Year(s), or Lifetime.

Meter Amt

Specify the maximum amount of miles, impressions, clicks, etc. that are allowed under this warranty. For example, for a 50,000 mile warranty, specify 50,000. The meter amount value is updated for specific unitson the Incidents, Service Order Lines, or Units forms. The value here can be compared to the current value for a unit to determine if the unit is currently under warranty.

Adding or Updating Information About a Unit Manually

You can add or update unit information automatically through utilities or through selections on the **Service Parameters** form. This topic describes how to add or update a unit manually through the **Units** form.

On the **Units** form, specify this information to describe a specific unit:

1 In the header section, provide general information about the unit:

Unit

Specify the unit ID.

Item

Select an item number from those defined on the **Items** form.

Customer Item

Optionally, select a customer item.

Description

The item description is displayed from the **Items** form but can be overwritten.

Customer

Select the customer associated with the unit.

Ship To

The customer ship to location is displayed.

Unit Status Code

Select a status code to indicate the condition of the unit. These are maintained on the **Unit Status Codes** form.

Last Meter Amount

For new units, the last meter amount is set to zero. For existing units, the last meter reading amount is displayed.

Last Meter Date

For new units, the current date is displayed. For existing units, the last meter reading date is displayed.

Warranty

This field indicates whether any active warranty records exist for this unit. Warranty records are added to a unit or sub-component on the **Unit Configurations** form. An active warranty record has a starting date prior to the current date, and either no end date or one in the future.

Originating Site

Specify the location where the unit was originally built, if your system is multi-site.

2 In the **General** tab, specify this information:

Preventative Maint, Calibration, and **Inspection**

Specify the last date that this type of work was done on the unit, and the next date that this type of work is scheduled to be performed on the unit.

Full List Price and **Sale Amount**

Specify the list price of the unit, and the price actually paid for this unit.

Service Partner

Specify the preferred partner to use for performing service on this unit.

Priority Code

Select a default priority code to use when this unit is added to an incident. For more information, see About Incident Escalation.

Warehouse and **Location**

Specify the warehouse and location of the unit.

Available for Rental/Service

Select these fields to indicate that the unit is available for rental or service. This field is informational only.

Hold and **Reason**

Select this field if the unit is currently on hold; that is, no maintenance is to be performed on the unit until the field is cleared. Then specify the reason for the hold.

Install Date

Specify the install date for the configuration. The value defaults to the current date but can be overwritten. This date is used by the **As of Date** calculation to determine what components are displayed.

Ship Date

Specify the date that the unit is shipped. If the **Create Unit On Shipment** field is selected in the **Service Parameters** form, this date is automatically updated to the shipment date when the unit is created during shipping.

Manufacturer

Specify the name of the manufacturer of the unit.

Mfg #

Specify the number assigned to the unit by the manufacturer.

Region

Specify the region that the unit is assigned to, as defined on the **Service Regions** form. On incidents or service orders where a unit is selected, the Region field defaults to the value specified here.

3 In the **Customer** tab, specify the customer and consumer that currently owns or has possession of the unit. You can also record information about the original sales order to the customer.

4 In the **Maintenance** tab, specify this information:

Asset Number

If the maintenance involves a fixed asset, select the number.

Work Center

Select the work center where the maintenance is performed.

Resource

Select the resource upon which the maintenance is performed.

Copy Maint Button

Click this button to copy the item planned maintenance schedule to use for the unit maintenance schedule.

Active

Select this check box if the maintenance line is currently active.

SRO Type

Select the SRO type.

Frequency

Select the frequency of the production of the service order:

- **Every:** Uses the duration fields to create an SRO at every interval.
- **Once:** Creates an SRO one time.
- **Annually:** Uses the month and day fields to create a service order on a specific date each year.

Month/Day

These fields are enabled when the maintenance frequency is set to annual. Specify the month and day for the service.

Date Duration

Specify the length of time the maintenance requires. This value is used in conjunction with the Increment field to determine the calculation. This field is disabled when the frequency is set to annual.

Increment

Specify an increment for the service order. This field is disabled when the frequency is set to annual.

Lead Time

Specify length of time is needed in order to prepare for the work to be performed on a maintenance SRO.

Increment

Select a value that to use in conjunction with the Lead Time field for determining when the maintenance service order is created. Available options are:

- Days
- Months
- Years
- Meter

Start Date

Select a date for the beginning of maintenance.

Meter Amount

The amount of miles, impressions, clicks, and so on that have been recorded for a specific unit is displayed. This value may be used to determine if a unit is currently under warranty.

SRO

Select the SRO.

SRO Line

Select the SRO line.

Last SRO Num

The last service order that was generated for the maintenance line is displayed.

Shift ID

Select a valid shift. The resource will be available for work during the intervals specified on this shift. You can set up shift intervals on the **Scheduling Shifts** form.

Start Time

Specify the start time for the current record.

Down Time

Specify the number of days needed to perform maintenance work. This information is used with scheduling equipment in a plant maintenance scenario to ensure that work is not performed while the equipment is unavailable.

Schedule Basis

Select whether maintenance service orders are generated based on the end date, close date, or maintenance date of the last SRO.

Schedule Future

Select this check box to create maintenance service orders based on the frequency selected and regardless of any prior SROs that are open in the system for the selected maintenance line.

5 Use the **Service History** tab to view information about the unit's service history. Select a record and click **View** to display the **Service Order Lines** form for that record.

6 Use the **Incidents** tab to view information about incidents involving this unit. Select a record and click **View** to display the **Incidents** form for that record.

7 Use the **Owner History** tab to view information about the owner of the unit.

8 Use the **Status History** tab to track updates that were added for the unit status code. Records can be appended either manually through the **Units** form or remotely through the Service Management Mobile module. By default, the grid records are sorted by date column, with the most recent record at the top of the list.

Date

The date and time of the unit status change are displayed.

Status

The unit status code is displayed.

Partner

The partner who performed the unit status change is displayed.

Source Type

The source of the unit status update is displayed. Options are SRO, Incident, and Unit.

Source

For the unit source type, this field is blank.

9 Use the **Meter History** tab to track updates that were made to the unit meter amount. Records can be added to this grid in several ways: manually on this tab, through triggers on the meter amount field on the **Incidents**, **Service Order Lines**, and **Units** form, or remotely from the Service Management Mobile application.

By default, the grid records are sorted by date column, with the most recent record at the top of the list.

Date

The date that the meter amount was recorded is displayed.

Meter Reading

The amount of miles, impressions, clicks, and so on that have been recorded for a specific unit is displayed. This value may be used to determine if a unit is currently under warranty.

Partner

The partner who performs the meter reading and enters the updated amount is displayed.

Source Type

The source of the meter update is displayed. Options are SRO, incident, or unit.

Source

For the unit source type, this field is blank.

10 Save the record.

Other Ways to Use the Units Form

Use these buttons on the form as described here:

- Click **Unit Configuration** to view details about the selected unit on the **Unit Configurations** form.
- Click **Incidents** to view information about incidents related to the selected unit on the **Incidents** form.
- Click **Service Order Lines** to view lines that include the selected unit on the **Service Order Lines** form.
- Click **Contract Lines** to view lines that include the selected unit on the **Service Contract Lines** form.

Creating and Maintaining Consumers

Use the **Consumers** form to create, updated, and delete consumers and related information. A consumer is the end user or recipient of a unit. A unit can be sold to one customer and distributed to another. This "other" customer is the consumer. Each time the unit changes hands, the previous and current consumer is stored in the Consumer History file. To add a new consumer, select **Actions > New**.

Specify these fields for the new consumer or when updating an existing consumer:

1 Specify these fields in the **Header** section:

Consumer

Specify a consumer. A consumer is the end user or recipient of a unit. Even though a unit may have been sold to one customer, it may have been distributed to another customer. That "other" customer is the consumer.

Consumer Ship To

Select the Consumer Ship To location. If the field is left blank, the zero ship to location is the default value.

Customer

Select a customer.

Name

The description field associated with a consumer.

2 On the **Contact** tab, specify the name of the contact person and related contact information.

3 Specify these fields on the **Address** tab:

Address

City

County

Prov/St

Country

Postal/ZIP

4 Save your changes.

Maintaining Warranty Codes for Items

Use the **Warranty Codes** form to maintain warranty types. Warranty codes are used to establish which warranty applies to an item. Specify these fields on the form:

Warranty Code

Select a unique alphanumeric code to represent a warranty that may be attached to an item.

Description

Specify a description for the code.

Warranty Type

Select a type for the warranty, which establishes ownership of the warranty:

- User
- Vendor
- Manufacturer

Date Duration

Specify the term of the warranty. Enter a number in the first field and then choose an associated increment. Possible choices are Day(s), Month(s), Year(s), or Lifetime.

Meter Amount

Specify the amount of miles, impressions, clicks, and so on that have been recorded for a specific unit. This value may be used to determine if a unit is currently under warranty. A record is automatically appended to the Meter History tab of the **Units** form.

Running the Warranty Expiration Report

Use the **Warranty Expiration Report** to generate a list of expired warranties. Follow these steps to use the report:

1. Open the Warranty Expiration Report.
2. Specify the range of values to include in the report:
   - Warranty Expires Between
   - Item
   - Component Item
3. Select **Include Sub Components** to include the information in the report.
4. Click **Preview** to view the report output.
5. Click **Print** to run the report and print the output.

Configuring Units

Using the Unit Configurations Form

Use the **Unit Configurations** form to review and analyze the components of a unit. The configuration is the complete material make up of a unit, including all subcomponents, replacement parts, and add-ons. The unit configuration is date- and time-stamped to track the history of a unit. A complete history of each unit is displayed on the form.

1. Open the Unit Configurations form.
2. Select the unit that you want to review.
3. Select an item.
4. Click Find to launch the Unit Configuration Search form if you need to search for a unit.
5. Optionally, click View Unit to launch the Units form, filtered for the current unit.
6. Optionally, click Create Configuration to launch the Unit Copy modal form and create a new unit configuration.
7. Click Filter-in-Place to populate the remaining fields on the form.
8. The current date is used as the default As Of date. Optionally, specify an alternate date.
9. Select Show Removed to include the components that have been removed from the configuration in the tree.
10. Select Show Future Additions to show the components that have been added to the configuration in the tree.
11. These fields are read-only and show information related to the component:

    ID

    The configuration number used to identify the component is displayed.

    Item

    The item number is displayed.

    Description

    A description of the item is displayed.

    S/N

    The serial number is displayed.

    Qty

    The amount of this component that exists in the unit is displayed.

    U/M

    The unit of measure for the component is displayed.

Install Date

The date the component was installed is displayed.

Remove Date

The date the component was removed from the configuration is displayed.

Reason

The user-defined code identifying the reason for removing the component from a unit is displayed. These codes are maintained on the **Unit Configuration Removal Reasons** form.

Remove SRO

The SRO reference number of the service order that removed the component from the unit is displayed.

12 Optionally, specify values for these fields:

- Customer Item
- Revision Number
- Lot

13 Select **Include Subs** if you want to include the subcomponents of the selected component when you click **Create SRO**.

14 Optionally, click **Create SRO** to launch the **Service Order Quick Create** utility. A SRO is created for the selected component.

15 The grid on the **Warranty** tab shows the warranty information associated to the component.

16 The grid on the **Inspections** tab lists all inspections that are linked to the component.

17 Click **Refresh** to update the form based on the currently selected options. All components of a unit are listed in the tree view.

Running the Unit Configuration Create Utility

Use the **Unit Configuration Create Utility** to build the configuration for a unit when the **Auto Create Unit on Shipment** and **Auto Build Unit Configuration** check boxes are not selected on the **Service Parameters** form. You can set this utility to run in the background queue so the system automatically creates unit configurations for all serial tracked items completed on jobs for that day. Follow these steps to create the unit configuration:

1 Specify these fields when configuring the unit by job:

By Job

Select this check box to activate the job options for creating unit configurations.

Job

Select the range of jobs to include in the utility.

Item

Select the range of items to include in the utility.

Product Code

Select the range of product codes to include in the utility.

Job Date

Select the range of calendar dates to include in the results.

Increment Date

Select this check box to automatically increment the date ranges.

2 Specify these fields when configuring the unit by serial number:

By Serial Number

Select this check box to activate the serial number options for creating unit configurations.

Serial Number

Select the range of serial numbers to include in the utility.

Item

Select the range of items to include in the utility.

3 Optionally, specify these settings for the unit configuration:

Create Units for Sub Components

Select this check box to create units for serial tracked subcomponents.

Create Units for Items that are Not Serial-Tracked

Select this check box to create units for jobs that do not contain serial tracked items. This option creates unit records with serial numbers in this form:

- **Prefix:** The specified prefix for non serial tracked units.
- **Job:** The job number.
- **Suffix:** The job suffix.
- **Qty:** For each item completed on the job, a unique serial number is generated by this component.

Prefix for Units that are Not Serial-Tracked

Specify the prefix to append the number range of units being created.

4 Click **Process** to run the utility.

Running the Item Where Used On Configuration Report

Use the **Item Where Used On Configuration Report** to generate a list that shows where a particular item or serial number is used in the service configurations. Follow these steps to generate the report:

1 Open the Item Where Used On Configuration Report form.

2 Specify this information for the item:

- Item Number
- Serial number
- Revision
- Manufacturer of the item

3 Select **Customer** or **Consumer** to show either the customer or the consumer associated with the item.

4 Click **Preview** to preview the report output.

5 Click **Print** to run the utility and print the report.

Running the Indented Unit Configuration Report

Use the **Indented Unit Configuration Report** utility to generate a report output showing unit configuration and warranty information for the subcomponents of the unit. The report is time phased so the change in configuration over time can be displayed. Follow these steps to run the report:

1 Open the Indented Unit Configuration Report.

2 Specify these fields:

Include Warranty

Select this check box to include the warranty information associated with the unit as part of the report output.

Level

Select the lowest level to be displayed in the indentation of the unit configuration. If the value is set to 0 then all levels are displayed.

Page Break Between Units

Select this check box if you want to have page breaks between units on the report.

Starting/Ending Unit

Select the range of units to include for the report.

Starting/Ending Item

Select the range of items to include in the report.

As Of Config Date

Indicate the last possible configuration date of a unit in order to qualify for this report. Any unit with a configuration date earlier than this value is included in the report. This field defaults to the current date.

3 Click **Preview** to view an output of the report.

4 Click **Print** to run the utility and print the report.

Automating Updates to Unit Configurations

As service is performed on a unit, its configuration information may need to change to reflect the work that was done. Use these areas of the system to automate the changes:

Material Transaction Posting

You can set up the system so that, when SRO Material Transactions are posted for service orders where a unit is specified on the SRO line, the unit's configuration can be changed accordingly. Use the **Unit Configuration Update Method** field on the **Service Parameters** form to handle this.

You can specify one of these options for the update method. For all options except Never, you must provide a reason code to use when a component is removed from the unit. By default, this method is set to **Prompt**.

- **Never**: A material transaction posting does not affect unit configurations. Updates must be performed manually.
- **Prompt**: The system prompts the user to ask if the configuration should be updated. If the response is Yes, the Unit Configuration form is displayed.
- **Auto Append**: If you select this option, you must also specify a **Configuration Change History Branch**. Each time a material transaction is posted, the configuration changes are logged in the history branch of the configuration tree.

  When a return transaction is performed, the system looks for the first occurrence of the item on the configuration that has not already been removed and, if one is found, sets the removal date and removal reason. If the item is not found, the user receives an error message.

  When an issue or shipment transaction is performed, the system creates the new component in the Change History branch. The installation date is set to the transaction date of the material transaction.

- **Auto Synch:** The system adds and removes configurations without any user intervention.

  When a return transaction is performed, the system looks for the first occurrence of the item on the configuration that has not already been removed and, if one is found, sets the removal date and removal reason. If the item is not found, the user receives an error message. If the item is serial tracked, the exact item, as opposed to the first item found, is removed. If more than one of the same item exists on the configuration, the first occurrence of that item, based on component ID, is removed.

  When an issue or shipment transaction is performed, the system looks for the first occurrence of the item on the configuration, removed or not. If the item is found, a new component is created in its place. Otherwise, the component is added to the bottom of the tree.

When more than one serial-tracked item is issued, the system automatically creates multiple configuration records, one configuration for each serial number.

Notes:

- Only item records where **Include on Configuration** is selected (on the **Items** form) can trigger a configuration update.
- Loaner shipments and returns do not trigger configuration updates.

Reversing a Material Transaction Posting

When the Configuration Update Method is set to Never, the system does not try to change the unit configuration when reversing a material transaction posting. For the other three options, the system tries to back out any changes to the configuration that were a result of the original posting.

SRO Material Data Collection

The data collection posting routine observes the unit configuration update method when set to Auto Synch or Auto Append. If the parameter is set to Prompt or Never, any posting on the form does not change the unit configuration.

Reviewing Unit Configuration History

Use the **Unit Configuration** form to review unit configuration history. Use these fields to change the tree view and review the history:

As Of

Select a date to repopulate the tree to show only the components that existed before this date.

Show Removed

Select this check box to repopulate the tree to show components with a **Remove Date** earlier than the **As Of** date in red.

Show Future Additions

Select this check box to repopulate the tree to show components with an **Install Date** after the **As Of** date in blue.

Refresh Button

Click this button to refresh the tree with the new settings.

Using the Unit Configuration Search Utility

Use the **Unit Configuration Search** utility to find unit or unit related items.

1 Specify this information:

Search String

Specify the text on which to perform the search.

Current Only

If you accessed this form from the **Unit Configuration** form, then this option clears any information entered in the **Search String** field and returns only unit and component information for the selected configuration. Otherwise, no results are displayed because the form is not linked to a specific unit configuration.

Unit and Component Search Options

Select the categories of units and/or components on which to perform the search.

Customer

Specify the customer ID to filter the results for a specific customer.

2 Click **Search** to perform a search based on the search string and the selected options.

Using the Unit Customer Update Form

The **Unit Customer Update** form is launched when a conflict arises between the customer assigned to a unit and the customer currently associated with the unit through an incident or an order. Use these buttons to correct the conflict:

- **Update Incident/SRO:** Change the customer on the incident or service order based on the unit customer and saves the record.
- **Update Unit**: Changes the customer of the unit and saves the record.
- **Update Neither**: Continues with save and does not change the customer on the unit or on the incident/order.

Example

Unit number 505 has been set up on the **Units** form with customer number 12. The user goes to a service order line where the SRO customer is 19. If serialized unit 505 is used on the line, the modal **Unit Customer Conflict** form is displayed upon attempting to save the record. The user can choose whether to update the customer on the SRO, update the customer record on the **Units** form, or not to update either one.

Copying Information from an Existing Unit

Use the **Unit Copy** modal form to copy the information from an existing unit to a new unit. Follow these steps to copy a unit:

1 Click **Create Configuration** on the Unit Configuration form to launch the Unit Copy form.

2 Specify these fields:

From

Select the source from which you are copying the configuration.

Job

If the source is a job, select the job you are copying.

Unit

If the source is a unit, select the unit you are copying.

Item

If the source is an item, select the item you are copying.

Install Date

Specify the date of installation for the configuration. The current date is the default date.

Create Units for Sub Components

Select this check box to create sub components on the configuration. If cleared, only a configuration for the parent unit is created.

3 Click **Process** to run the utility and complete the copy.

Adding Service Information for Existing Items

Use the **Service Items** form to set up additional service information for items. Follow these steps to add information for an item:

1 Specify these fields in the **Header** section:

Item

Specify the item for which you want to add information.

Description

A description is displayed for the item.

2 On the **General** tab, specify the Calibration, Inspection, and Preventive Maintenance requirements for the item. Specify these fields in the Other section:

Meter Label

Specify a new field label to use on the **Warranty Codes** form. This is used if the warranty set up is based on something other than a date duration.

Default Contract Unit Of

Select the unit of rate to use as the default when the item is added to a service contract.

Priority Code

Select the priority code to default on an Incident created for this Contract, Unit, Item, or Customer.

Include In Configuration

Select this check box to add the item to the unit configuration using the unit configuration build programs.

Exclude from ATP/CTP Calculation

Select this check box to exclude the item when the system runs the CTP calculation to set a projected date.

DRP Item

Select this check box to include the item in distribution requirements planning (DRP).

3 On the **Warranty** tab, you can view and maintain all the warranties attached to the current item. During the creation of the unit configuration for a unit, all warranties for each of the component items is copied from this grid to the configuration.

4 On the **Certification** tab, you can view and maintain any certifications required to service an item. These are matched with the certifications entered on the **Partners** form to determine if a partner has the necessary qualifications to work on a SRO or incident associated to the item.

5 On the **Skills** tab, you can view and maintain any skills required by an item. These are matched with the skills entered on the **Partners** form to determine if a partner has the necessary qualifications to work on a SRO or incident associated to the item.

6 On the **Contract Rate** tab, you can view and maintain each of the annual service contracts available for the item. The values assigned are used for contract lines entered for the item.

7 Specify these fields on the **Maintenance** tab:

SRO Type

Select the SRO type.

Frequency

Select the frequency for the production of maintenance service orders:

- **Every:** Uses the duration fields to create an SRO at every interval.
- **Once:** Creates an SRO one time.
- **Annually:** Uses the month and day fields to create a service order on a specific date each year.

Month/Day

For the annual frequency, specify the month and day of the service order creation.

Date Duration

Specify the length of time the maintenance requires.

Duration Type

Select the value to use with the date duration amount.

Down Time

Specify the number of days needed to perform maintenance work.

Lead Time

Specify the length of time needed to prepare for the work to be performed on a maintenance SRO.

Lead Time Type

Select a value to use in conjunction with the Lead Time field to determine when the maintenance service order is created. These are the available options:

- Days
- Months
- Years
- Meter

Start Date

Select a calendar date for the beginning of maintenance.

Meter Amount

Select the amount of miles, impressions, clicks, and so on that have been recorded for a specific unit.

SRO

Select the SRO for the maintenance.

SRO Line

Select the SRO line for the maintenance.

Last SRO

The last service order that was generated for the maintenance line is displayed.

Schedule Basis

Select a date to use as the schedule basis for the service orders.

Schedule Future

Select this check box to create maintenance service orders based on the selected frequency, regardless of any open SROs.

8 On the **Contract Surcharges** tab, you can view and maintain any contract surcharges for the service item. You can specify miscellaneous charges to be added to the contract. When invoiced, the contract pricing routine uses the percentage or fixed amount specified to calculate any surcharges. These surcharges are displayed as a line item on the contract invoice.

9 Specify these fields on the **Item Whse** tab:

Source

Select the source, which determines how replenishment is handled for the item:

- **Purchased:** Purchase orders are used by DRP to handle replenishment.
- **Transferred:** Transfer orders are used by DRP to handle replenishment.

Supply Whse

Select the supply warehouse to use when orders are created for replenishment.

Primary Vendor

Select the vendor to use when orders are created for replenishment.

Days Supply

Specify the number of days to look ahead to consolidate requirements to determine the amount of a replenishment order.

Consumable Item

If this check box is selected, inventory is not affected when an order for the item is received into the warehouse. The material is expensed.

Order Minimum

Specify the order minimum. This value is used as the order quantity when the replenishment demand is less than the order minimum.

Order Multiple

Specify the order multiple. If the replenishment demand is not an even multiple of this value, the order quantity is increased to the next highest multiple.

Order Maximum

Specify the order maximum. This value is used as the order quantity if the replenishment demand is more than the order maximum.

Whse

The warehouse code is displayed.

Qty For Rental

The total number of items in the warehouse that are marked as rentals is displayed.

Setting Up Unit and Item Maintenance Schedules

Unit Maintenance Schedules

When new units are created from a job, the maintenance schedule for the related item is copied to the new unit. To perform maintenance on the machines used in the plant, the unit record includes a work center and machine number.

Item Maintenance Schedules

You can set up a maintenance schedule for each item that includes multiple types of service. Set up the frequency of maintenance based on the time period or meter duration.

Creating a Maintenance Schedule for an Item

You can set up a planned maintenance schedule for an item. As new units are created, the maintenance schedules are automatically copied to the new units using the item number on the unit. Follow these steps to create a maintenance schedule for an item:

1. Launch the **Service Items** form.
2. Select the item for which you are creating a maintenance schedule.
3. On the **Maintenance** tab, select an **SRO Type**. This is used when a new SRO is created to handle maintenance.
4. Select the **Frequency** for the item maintenance. The **Down Time** field determines the amount of time required to service an internal machine. The **Lead Time** field determines the amount of time required in advance to create the maintenance order.
5. Click **Save** to create the new maintenance order.

Registering or Transferring a Unit

Follow these steps to register a unit:

1. Launch the **Units** form.
2. Filter to the unit that you want to register.
3. On the **Customer** tab, select the new **Consumer**. If the consumer is not listed, right-click and select **Add** to add a new consumer.
4. Click **Save**.

Follow these steps to transfer a unit:

1. Launch the **Units** form.
2. Filter to the unit that you want to register.
3. On the **Customer** tab, select the new **Customer**. If the customer is not listed, right-click and select **Add** to add a new customer.
4. Click **Save**.

Approving and Rejecting Registrations from the Portals

Use the **Unit Registration Posting** form to approve and reject unit registrations submitted from the Customer or Reseller Portal.

When the form is opened, all unposted registration entries from the portal are displayed in the upper grid. They are sorted by effective date in ascending order.

- To change the grid to display only posted registrations, select **Show Posted** and filter the form.
- To change the grid to display only rejected registrations, select **Show Rejected** and filter the form.

The bottom part of the form displays information specific to a selected record in the upper grid.

- Current Registration: This section shows details of the customer and/or consumer for which the selected unit is currently registered. All information is display-only.
- Registration Request: This section shows the information submitted by the portal user on the Unit Registration portal page. All information is display-only.
- New Registration: This section shows details of the customer and/or consumer based on what you enter in the **Customer**, Customer **Ship To**, **Consumer**, and Consumer **Ship To** fields in the upper grid. The information in the New Registration section is display-only.

NOTE: Consumer information is provided only if the **Use Separate Consumer** check box is selected on the **Service Parameters** form.

Approving Registrations

To approve registrations:

1 Assign a customer or consumer number to a selected registration record using one of these methods:

- If you know the number to use, in the New Registration section, select the customer or consumer number in the drop-down list.
- If you don't know the number to use, in the Registration Request section, click **Search** to find an existing customer or consumer number that coincides with the Registration Request information for this entry. Once found, you can type the number into the field in the New Registration section.
- If this registration is for a new customer or consumer, in the Registration Request section, click **Add As Customer** or **Add As Consumer**. You can add a new customer or consumer record for this entry, and the new number is automatically entered in the New Registration section.

NOTE: In order to add a new customer or consumer record for this entry, you must have a default bank code specified on the **Accounts Receivable Parameters** form.

2 Click **Post Current**. You are prompted to approve.

3 Click **Yes**. After the registration is posted, the **Customer** and Customer **Ship To** or **Consumer** and Consumer **Ship To** fields in the upper grid are updated with information from the registration record. Also, an e-mail is sent to the portal user with notification that the registration has been approved.

NOTE: You can add customer or consumer numbers for multiple registration records before posting. In this case, click **Post All** to post the entries.

Rejecting Registrations

To reject registrations:

1 Select the registration record to reject.

2 Click **Reject Current**.

To take the rejected status off of the registration entry so it can be posted, select the entry and then click **Undo Reject Current**.

Searching for a Customer or Consumer for Portal Unit Registration

When a unit registration request is submitted from the Customer or Reseller Portal, you must assign a customer or consumer number before posting the registration. You can search for possible existing numbers to use based on information in the new registration request that matches existing records.

To find an existing customer/consumer number:

1 In the upper part of the **Unit Registration Posting** form, select a new record that needs to be posted.

2 In the Registration Request section, click **Search**. The **Search For Unit Registration Posting** form opens, showing matching records based on these criteria:

Name
Address1
Address2
Address3
Address4
City
Prov/St
Postal/Zip
Country
Phone
E-mail

3 To use one of the existing records for the new registration request, scroll to see the Customer/Consumer number.

4 Click **OK** to close the form.

5 On the **Unit Registration Posting** form, enter that number in the New Registration section.

Status History Tracking

Each time the status of a unit is changed, an entry is made to a tracking table that documents not only the change but also who made the change, when, and why.

You can create industry-specific statuses. For example, rental shops can create statuses based on unit availability, repair shops can create statuses based on work being performed.

The Status History tab on the **Units** form shows status change details. The Unit Status value can be changed from Incidents, SROs, and Unit Maintenance. The fields on the Status History tab are described here:

- **Date:** The date when the status was changed
- **Status:** The prior unit status value
- **Partner:** The incident owner, SRO lead partner, or service partner from the unit
- **Source Type:** SRO, incident, or none
  - Set to SRO when Unit Status is changed from Mobile SROs
  - Set to Incident when Unit Status is changed from Mobile Incidents
  - Set to None when Unit Status is change in Unit Maintenance
- **Source:** The incident or SRO number; blank for a unit
- **Description:** A description of the incident or SRO; blank for a unit

Serial Cost Method

Costs can be tracked at the unit (serial-tracked item) level. You can view the costs on the Costs tab of the **Units** form. The Serial Cost Method mimics the logic of Actual/Specific costing but stores the values at the unit level. These types of serial cost tracking are available:

- **Cost Tracking by Serial Number for Issues and Returns:** As serial-tracked items that have the Cost Method assigned to Serial are moved in and out of inventory, the costs reflected in the journal entries come from the cost fields on the associated serial number.

  NOTE: When a Customer Return or Inventory Return is done, the cost that is associated with the unit that is being returned is replaced by the costs entered into the return transaction.

- **Cost Tracking for Rework on Serial Numbers:** As rework is done to either repair or enhance a serial-tracked item, the cost of the associated unit is incremented by the costs for the rework performed.

  NOTE: To apply this cost, the user must post a Line Return to Inventory transaction.

- **Unit Cost Reporting:** Inventory Cost Reports take into account the new cost fields at the unit level for any item using the Serial Cost Method.

Additional Information

- **Conversions:** For items converted to this costing method, the system assigns unit costs by averaging the total cost of all serial numbers that are currently in stock. If the user later changes cost methods to something other than Serial, the unit level cost fields are then ignored.
- **Item Unit Cost Values:** The Cost field on the **Items** form, **Item Stockroom Locations** form, and **Item Lot Locations** form are updated based on the last transaction that was processed.

- **Multi-site:** Transfers of serial-costed items across sites are treated like a sale, calculating an average cost per quantity, keeping in line with the way other costing methods function.
- **G/L Accounts:** Inventory account numbers for serial-based journal entries come from the item location.
- **Journal Entries:** Journal entries are created for the total cost for each bucket when transactions of multiple serials are posted. Individual journal entries for each serial are not created.

Meter History Tracking

Units can track meter information over time. Each time the meter amount of a unit is changed, an entry is made to a tracking table that documents not only the change but also the who, when, and why. This helps technicians to analyze service failure points and usage information.

The Meter History tab on the **Units** form displays a list of these meter change details:

- **Date:** The date when the meter was changed
- **Meter Reading:** The prior meter value
- **Partner:** The Incident Owner, SRO Lead Partner, or Service Partner from the Unit
- **Source Type:** SRO, Incident, or None
  - Set to SRO when Meter Amount is changed from Mobile SROs
  - Set to Incident when Meter Amount is changed from Mobile Incidents
  - Set to None when Meter Amount is changed in Unit Maintenance
- **Source:** The incident or SRO Number; blank for a unit
- **Description:** A description of the incident or SRO; blank for a unit

Outlook Integration

About the Microsoft Outlook Add-in

With the Outlook Add-in installed and configured, you can create new incidents, or notes specific to an incident, from Outlook. When FASView is configured and installed, you can store emails as incident events within Infor CloudSuite Service, to provide an audit record of the communication.

Back Office and Outlook Client Setup

To use the features described here, you must first install and configure the Outlook Add-in on client computers, as described in the *Outlook Add-in Installation Guide*. After installing the add-in, follow the steps below to configure the add-in for use.

Configure Back Office

Follow these steps to configure the back office:

1. Launch the Outlook Integration Parameters form.
2. Populate information about the intended use. See the online help for details about individual fields.
3. Grant permission to the appropriate users and/or groups.

Configure Outlook Client

Follow these steps to configure the Outlook client:

4. On the Outlook Add-in, click the **Service** tab. This tab contains all of the features associated with the add-In.
5. Click **General Settings** in the Outlook Add-in ribbon.
6. Specify the connection information for Infor CloudSuite.
7. Specify the user name and password to use to access the system.
8. Select **Use Task Panes** to display a reading pane of service information when viewing emails.

Available Features

My Work

Click **My Work** to display a list of incidents owned by the Outlook user. On this form, you can log a note or drill down into the **Incidents** form within the back office.

Incident Event

Click **Incident Event** to create an event based on information from the active email. Before saving the incident, a window is displayed that shows a preview of what is saved and provides an option to select incidents.

The add-In looks for an incident number referenced in the email and tries to pre-populate the incident field.

NOTE: For those using FASView, if a document type is set up for incident documents, attachments from the email can be stored in the directory on the network.

Create New Incident

If a new customer issue must be created as a result of an email, click **Incident** in the Outlook add-in ribbon to launch Infor CloudSuite with the **Insert Incident Entry** form pre-loaded with information from the email.

Log a Note

Notes can be associated with incidents through the creation of service events. When general information, such as a phone call, must be tracked, click **Log Note** in the Outlook Add-In ribbon to add a note in the system. The note is tied to an event.

Send Email with FASView E-mail Template

For those licensed for FASView, click **Send Email** on the Outlook Add-In ribbon to display a list of FASMail templates. Select a template to use. An email should be generated with the appropriate data substitutions.

Infor CloudSuite Visibility (Task Panes)

When you read an email in Outlook, related details, such as the customer name and notes, can be displayed in a reading pane. Outlook can access other records in the database associated with the Outlook user. Outlook users with a valid Infor CloudSuite license can launch the appropriate maintenance form. The form is filtered to show information for the current customer or item shown in Outlook.

Public Folder Copy for Exchange Users

When using Outlook with an Exchange server, emails can be copied to a public folder on the Exchange server to be stored for archival. You must select **Enable Public Folder Copy** on the **Outlook Integration Parameters** form.

NOTE: The Outlook feature is different from the Microsoft Exchange Integration feature. The Exchange feature runs as a service on the utility server and can be configured to synchronize service appointments with user Exchange calendars.

Setting Up the System to Work with Exchange

Infor CloudSuite can be integrated to a Microsoft Outlook client using Microsoft Exchange synchronization. Service appointments can be linked to a user's Outlook calendar. The Outlook appointment receives updates as details about the appointment are set or changed in Infor CloudSuite. The integration can optionally be configured to allow date, time, and subject changes from Outlook to update the Infor CloudSuite appointment record.

For information about installing the Outlook add-in, see the appropriate installation guide.

To set up integration parameters in Infor CloudSuite, specify this information on the **Service Exchange Integration Parameters** form:

1 In the Exchange Server tab, specify connection information:

Use Workstation Login

Select this option to use the workstation user and password instead of manually declaring a user name and password here. If this field is not selected, you must enter a user name and password.

User Name and Password

Specify the domain and user ID and password that the application uses to connect to the Exchange Server. The password is encrypted in the database when the record is saved.

NOTE: This relates to the user/password used when the Exchange Integration service that is running on the utility server connects to the Exchange Server. It does not apply to the connection to Infor CloudSuite. If the user selects Workstation Logon, the system uses the user/password from the Log On As user that is set up for the Exchange Integration service. If you do not want to use this same user, you can clear the selection and enter a Domain User who has access to read/write to the Exchange Server.

URL

Specify the (secure) internet address used to access the Exchange Server. Generally just using HTTPS://Servername is acceptable, as long as you used the default service names at installation. You can also specify the full path to the EWS Web service, for example: https://xmail2/EWS/Exchange.asmx

Version

Select the appropriate supported Microsoft Exchange Server version to connect to.

Supported Versions: The currently supported versions are Exchange 2007SP1 and Exchange 2010.

2 In the Schedule Appointments tab, specify this information:

Enable Appointment Synchronization with Exchange

Select this field to enable synchronization of service appointments with the Exchange calendar

Polling Interval

Specify how often the synchronization routine runs.

Polling Start Time

Specify the time of day when the synchronization starts.

Polling End Time

Specify the time of day when the synchronization ends.

Schedule Days Forward

Specify the number of days into the future records are evaluated for synchronization.

Schedule Days Backward

Specify the number of days into the past records are evaluated for synchronization.

Reminder

Specify the time in hours that is assigned to the reminder for new appointments that are created.

Allow Exchange Updates

Select this option if all users are allowed to update the appointments in Exchange.

3 On the **Partners** form, for each partner, select **Exchange Synchronization Enabled** and specify the Exchange Calendar folder that will be synchronized with the partner's service schedule.

NOTE: In most cases, the Exchange Folder can be left blank and the appointments will be synchronized with the user’s default Inbox Calendar based on the email address set up in Exchange.

Additional Information

A Windows service must be installed and configured in order for the add-in to communicate with Exchange. The service uses existing Infor CloudSuite configurations to access the correct application database with the proper credentials. The Exchange service writes to a log file that can track different levels of connection detail. The service automatically deletes old log files.

The user ID that is used to connect to Exchange must be granted Administrative rights on the Exchange server and must be granted Owner access to all users' Exchange Calendar and Contact folders to which the add-in will be synchronizing data.