Infor Mobile Service User Guide

Important Notices

Trademark Acknowledgements

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Contents

1 Overview

This application provides field service engineers quick access to relevant resources and data. This improves service resolution efficiency and customer satisfaction.

The field service engineer is linked to a service center and is responsible for performing service activities assigned to the designated service center. The service engineers can use this application as a virtual office, to accomplish their day-to-day tasks, remotely.

Profiles

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Before signing in to the application every user of Mobile Service must set up a profile. A profile contains the connection settings to connect to the LN backend, for example username, password and LN UI Server URL.

Creating a profile

Execute the following steps to create a new profile:

1. Start the application by clicking the application icon available on your system.
   The sign in screen is displayed.
2. Click the New Profile option that is located below the **Sign In** button.
3. Specify a new profile name and a new profile password.

   Note: This password is the local profile password that is used to sign in to the application. It does not have to be the same as the password that is used to connect to the Infor LN backend.

4. Click **OK**.
   The connection settings screen for the current profile is displayed.
5. Specify the connection settings.

   For more information, see "Connection settings" on page 11.

6. Click **OK**.
   The sign in screen is displayed and the created profile is available in the profile drop down list.

Signing in with a profile

Execute the following steps to sign in to the Mobile Service application with an existing profile:

1. Start the application by clicking the application icon available on your system.
   The sign in screen is displayed.
2. Select a profile from the profile drop down list.

3 Specify the profile password.
4 Optionally, select the **Automatically sign in with this profile** option.

   Note:

   - This option is available only when connecting to a non-multi-tenant cloud environment.
   - If this option is selected, the sign in is skipped the next time the application is started. Sign out from the application to view the sign in screen.

5 Click **Sign In**.
   The My Schedule screen is displayed.

Profile options

The profile options can be started from the sign in screen by clicking the **Profile Options** option that is located below the **Sign In** button.

The Profile Options screen has the following buttons:

- **Connection Settings**, click this button to open the connection settings for the current profile. The connection settings can be changed here. For more information, see "Connection settings" on page 11.
- **Change Profile Password**, click this button to change the current profile password.
- **Delete Profile**, click this button to delete the current profile.

The screen can be exited by clicking the 'back' button.

Connection settings

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The connection settings are required to connect to Infor LN. These are provided by the system administrator.

Execute the following steps to display or change the connection settings:

1. Start the application by clicking the application icon available on your system. The sign in screen is displayed.
2. Select the profile for which the connection settings must be changed or displayed.
3. Click the Profile Options option that is located below the **Sign In** button. The Profile Options screen is displayed.
4. Click the **Connection Settings** button. The Connection Settings screen for the current profile is displayed.
5. Change the connection settings and click **OK**, or click **Cancel** to leave the Connection Settings screen.

The first field in the connection settings is the **Multi-Tenant Cloud** field. The other fields displayed in this screen depend on the selection of the **Multi-Tenant Cloud** field.

If the **Multi-Tenant Cloud** field is not selected, the settings to connect to a single-tenant cloud environment or to connect to a non-cloud environment (on premise) are displayed.

If the **Multi-Tenant Cloud** field is selected, the connection settings to connect to a multi-tenant cloud environment are displayed.

Specify the following fields when the **Multi-Tenant Cloud** field is not selected:

- **Username**: The username for connection with the Infor LN backend. In case of a Single Sign On (SSO) environment, this is the SSO user name. Otherwise this is the LN backend username.
- **Password**: The password to connect to the Infor LN backend.
- **LN UI Server (URL)**: The URL of the Infor LN UI Server.
- **Environment**: The environment Infor LN runs in.
- **Company**: The data company to use in the environment.

Enter the following fields when the **Multi-Tenant Cloud** field is selected:

- **LN UI Server (URL)**: The URL of the LN UI Server.
- **Environment**: The environment LN runs in.
- **Company**: The data company to use in the environment.

- **Oauth2 Server (URL)**: The URL of the authentication server.
- **Tenant**: The tenant to connect to in the cloud.
- **Client Id**
- **Client Secret**
- **Redirect URL**

Note that no username and no user password are needed for multi-tenant cloud. These will be asked for when a cloud connection is established. Authentication is then handled via a web browser interface.

The Connection Settings screen will close and the settings will be saved when clicking **OK**.

Settings

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The Mobile Service application allows you to specify various settings as described in this chapter.

Connection settings

This page provides an overview of the settings required to connect to Infor LN. Most of this information is defined during the creation of a profile and cannot be changed in the settings but only be viewed. For more information, see "Connection settings" on page 11.

You can also specify the optional settings when the Multi-Tenant Cloud connection setting is not selected:

- Bshell Command: Add specific commands to be used when connecting to Infor LN. This can be useful when testing or tracing. Normally, this setting must be blank.

  Note: An invalid command results in connection errors.

- Sign in automatically at startup: If this option is set to **Yes**, the application signs in automatically, at start up. Click the **Sign out** to go back to the sign in screen.

Send and Receive data settings

This page provides an overview of the settings required to synchronize the data with LN .

- Send and receive data automatically: If this field is set to Yes, the data synchronization with LN is automated. The application send and receives data from LN for each user defined number of seconds.
- Send and receive data when ordering benchstock: If this field is set to Yes, the application automatically trigger a synchronization as soon as you click the **Order Now** button on Inventory page.
- Automatic receive interval in seconds: The user defined number of seconds after which data is received from LN.

- Automatic send interval in seconds: The user defined number of seconds after which data is sent to LN
- Send and receive data when pausing or completing an activity: If this field is set to Yes, the data is sent or received when an activity is completed or even if an activity is paused. This makes it possible to send and receive data at the moment the engineer finishes the work for an activity.
- Number of days to keep the synchronization log: The number of days for which you want application to retain the synchronization log.
- Send GPS Information: If this field is set to Yes, the application will automatically log GPS data when starting, stopping and completing an activity. To use this functionality, the location service should be turned on in Windows Settings. Click the **Test GPS** button to test the functionality.
- Refresh application labels at startup: If this field is set to Yes, the application labels are refreshed every time you log on to Mobile Service. All labels and messages are stored in LN. This option is helpful if these labels and messages change frequently. If that is not the case, it is recommended to set this field to No.
- Refresh : Use the **Refresh** button to retrieve all application labels and messages from LN. This button is only enabled if the field **Send and receive data automatically** is set to No.

Data display settings

The settings for the format in which the data is displayed:

- **Display format for code and description** : Select the option to determine the display format for the code and the description for an entity from Infor LN. Examples: warehouses, labor types, etc. It is possible to display only the code, only the description or the code and the description.
- **Separator for code and description**: A delimiter used to separate the code and the description display for an entity.
- **Display format for item code and description**: This is an optional setting if the display format of the item code and item description must differ from the display format of other entities.

The language settings:

- **Use User Language**: If this setting is set to **Yes**, the language as defined for the user in Infor LN is used as the application language. If you want to use other language, this setting must be set to **No**.
- **Application Language**: The language in which the application is displayed. If you change the application language, it is applicable only after you restart the application. This field is enabled only if the **Use User Language** is set to **No**.

Schedule settings

This page provides an overview of the settings for the Schedule view.

Allow to accept/decline a visit in the day view: Use this setting to determine if accepting or declining activities for a single visit is allowed in the Day view of the schedule. If this field is set to No, the **Accept** and **Decline** button are not displayed in the Day view of the schedule.

Hours settings

This page provides an overview of the settings for the Hours view:

- Number of previous weeks for which to display hours: The number of weeks, in the past, for which the application retrieves the registered hours from LN.
- Number of following weeks for which to display hours: The number of weeks, in the future, for which the application must retrieve the registered hours from LN.

Visit report settings

This page provides an overview of the settings related to the visit report:

- **Show completed activities before visit report**: If this field is set to **Yes**, the completed activities are displayed as a list before generating the visit report. This makes it easy to select the activities that must be displayed on the visit report. It is possible to list all completed activities for the service order or only the completed activities for the actual visit.

Documents settings

If LN is linked to a Document Management System like ODM or IDM, some document settings can be setup in Mobile Service.

- **Automatically download documents**: If this field is set to **Yes**, the process to download the required documents from LN is automated. As soon as service orders are synchronized with LN, the related documents are downloaded.
- **Download documents for**: Use this option to download documents for All orders or Orders for today and the following period. This makes it possible to have the documents of all orders available or only the documents for a specific period This field is enabled only if the **Automatically download documents** field is set to **Yes**.
- Days: The number of days for which the document must be downloaded, starting from the current date. This field is enabled only if the value of the **Download documents for** field is set to **Orders for today and the following period**.

Serial history settings

This page provides an overview of the settings for the serial history views:

- Automatically download serial history for active visits: This indicates if the application automatically downloads serial history after downloading new service orders or updated service orders. The period to download serial history is defined in the next setting.
- Period to automatically download serial history data: When the previous setting is set to Yes, all history for this period is downloaded.
- Period to manually download serial history data: When the user clicks on the refresh button in the serial history view, the serial history is downloaded according to this period. The user can set this period at any value, but it is advised to set this to a longer period as the automatic download.
- Period to keep serial history data: When a visit is completed and no other visit references the same serialized item, the serialized item history could be removed. The user could however choose to keep history for a longer time if he expects to be servicing the same serials for more than one time. The user can set this period at any value but it is advised to set is to a longer period as the automatic download.

Send and Receive Data

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Mobile Service sends data to and receives data from LN. It is possible to define some settings to automate the process of sending/receiving data. For more information, see "Connection settings" on page 11

It is also possible to manually send and receive data. This can be done from the top bar by clicking on the arrows button. In that case no progress window will be shown. Another option to send/receive data manually is to click on the option 'Send/Receive' in the top bar. In that case a dialog will be shown to show the progress.

If you are accessing LN Mobile Service for the first time, you must perform a full data download. In which case, all the relevant master data such as items, warehouses, business partners, addresses, service types and the transactional data, such as service orders assigned to the engineer, is retrieved from Infor LN.

Do the following to activate a full download:

- Click the Menu icon in the top left corner of the screen to make the top bar visible and click **Send/Receive** option.
- The Send and Receive window is displayed. Select the Full Data Download check box and click Send/Receive.

The window displays the progress of the send and receive actions. A full data download erases all the local data and reads it again from LN.

Note: A full data download could take considerable time. It is recommended to perform this action only if the connection to LN is fast and stable. Note that all the local changes that are not yet sent to LN, are lost.

Note: If a normal download is not done for a long time, a full download is done automatically.

A normal synchronization (so not a full data download) only synchronizes changes of master data and transactional data since the last synchronization. This is the preferred way of working.

As soon as all the data is available in Mobile Service, you can start making changes such as changing material, adding hours, and so on. If you make changes an orange indicator is displayed, which indicates that the data in LN differs from the data in Mobile Service.

Sometimes, it is required to 'submit' local changes. For example, when you change the spent hours for a task. In that case you must submit this change by clicking the circle behind the task. The orange indicator disappears after the changed data sent to LN.

If not all the changes to a service order have been sent to LN, the latest version of the service order cannot be displayed in Mobile Service. In fact, any local change to a service order blocks the download of the latest version of that service order. In which case, the red-green indicator is displayed. This indicator is also visible in the 'Schedule View' to indicate that there is changed data which is not yet synchronized with LN.

Changes are sent to LN using web services. This process can result in an error, owing to changes in LN. In this case, a desktop alert is displayed indicating that the synchronization resulted in one or more errors and manual action is required. The desktop alert is displayed for a brief period. As long as synchronization errors exist, a yellow icon with an exclamation mark is displayed. Click on the desktop alert or the icon to view the action resulting in the errors and also the remaining actions that are blocked due to the error. Click the error indicator that is located to the right of the action and you can choose to:

- Skip this action for now: button empty
- Retry this action: button is checked
- Delete this action: button has a trash can icon.

Click on the synchronization button in the header, to synchronize the changes to LN. Note that all remaining actions must be synchronized properly to LN, before the latest data, the service order or other entity is displayed in Mobile Service.

My Schedule (Day, Week or Month view)

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Use the My Schedule Page to view the details of the activities that an engineer must perform on a daily, weekly or monthly basis. The schedule is displayed if Mobile Service is started. It can also be activated from the top bar.

Activities are grouped together into visits. All activities of a service order to be performed on the same location are added to one visit. For each visit, detailed information such as business partner, address information and service type is displayed.

The status of a visit is based on the highest status of the activities of that visit. If not all activities of a visit have the same status, the visit status starts with 'Partially'. Such as 'Partially Accepted'. The visit status is set to Completed only if all the activities are completed. The status of the visit is represented by the following colors.

- Status Assigned: grey
- Status Declined: red
- Status Accepted: orange
- Status Started: light blue
- Status Stopped: dark blue
- Status Completed: light green
- Status Finalized: dark green

You can perform these actions:

- Use the slider to zoom in or zoom out on the visits.
- Switch to Day, Month or Week view
- Move the visit.

  Note: The visit can only be moved if none of the activities it contains have a status Completed. It is also required the Service User Template assigned to the employee in LN has Reschedule Visits enabled.

- View the visit card that displays:
  - The name of the customer
  - The complete address of the customer
  - The repair and installation information such as service type, service order number, installation number

- The status of the visit such as **Assigned**, **Started** or **Completed**.

  Note: Not all the data is available in the Month and Week view.

- Click the visit to access the activities of the visit in the expanded view.
- Click **Accept** or **Decline** to Accept or Decline the visit.
- Add a Visit.

  Note: To add a Visit it is required the Service User Template assigned to the employee in LN has Create Service Order enabled.

- Editing a Visit.

Note: These options are enabled only if the status of the visit is Assigned . It is also required the setting "Allow to accept/decline a visit" is set to Yes in the app settings under settings menu item Schedule.

Accepting a visit

To accept a visit:

1. Go to the My Schedule page and right-click a visit
2. Click **Accept**.

Declining a visit

To Decline a visit:

1. Go to the My Schedule and right-click a visit
2. Click **Decline**.
3. In the Decline Visit window, specify:

   Reason: Select the reason for declining the visit. All reasons of type Assignment Rejection listed in Reasons (tcmcs0105m000) session are listed.

   Decline Text: Specify the additional information for the reason to decline the visit, if required

Moving a visit

A visit can be moved using drag and drop and by using the Edit Visit bar.

To move a visit using drag and drop:

1. Go to My Schedule page and click and momentarily hold to select the visit.

2 While keeping the mouse button depressed drag the visit to the desired time.

To move a visit using the Edit Visit bar:

1 Go to My Schedule page and right-click a visit.
2 Click **Edit.**
3 In the Edit Visit bar, you can edit the Planned Start Date and Time.

Adding a visit

To add a visit:

1 Go to the My Schedule page.
2 Click **+**.
3 Specify the required information.
4 Click **Add Visit**.

Note: Refer to other chapters in this manual on how to add activities, tasks, inspections, materials, travel and other cost to the new visit.

Editing a visit

To edit a visit:

1 Go to the My Schedule page and right-click a visit.
2 Click **Edit**.
3 Specify the required information.
4 In the Edit Visit bar the visit can be edited.
5 Click **Update Visit**.

Deleting a visit

To delete a visit:

1 Go to the My Schedule page and right-click a visit.
2 Click **Delete**.

Note: Only the newly created visits which have not yet been synchronized to Infor LN can be deleted.

Activities

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When a client reports a fault to the service provider, the service engineer visits the client location to resolve the fault. This page provides an overview of the task and the related activities that must be performed during a visit. Visits are determined dynamically. All activities from the same order and the same location are grouped together in one visit. As soon as the order, location differs or if the engineer needs to travel, a new visit is created. The activities that have a common top item, are grouped together and can be accepted or declined individually or in a batch. You can indicate whether you have started or stopped working on an activity, or completed an activity.

Note: You can click an activity to access the Activity Detail section.

The left sidebar also displays visit related information, such as the start time of the first activity, the finish time of the last activity of the visit, the picture of the business partner, address information, service order and visit status.

The left sidebar on the visit screen also displays these tabs:

- Activities : The list if activities of the visit to be performed
- Documents - Displays all documents linked to the service order. This tab is available only if the document management is implemented for Mobile Service.
- Report : Displays the visit report

You can perform following actions in the view of the activities:

- Review the list of activities.
- Start the details screen of one activity by clicking on it.
- "Adding notes to an activity" on page 25.
- "Declining an activity" on page 24
- "Starting and stopping an activity" on page 25.
- "Completing an activity" on page 25
- "Editing an Activity" on page 26
- "Adding an Activity" on page 26
- "Moving an Activity" on page 26

  Note:

  - The **Accept** / **Decline** options are enabled only if the status of the activity is **Assigned**.
  - The **Start** / **Stop** options are disabled only if the status of the activity is **Assigned** or **Completed**.

- The **Complete** option is only enabled if the activity is started and stopped thereafter.
- Editing an activity in the Edit Activity bar is only enabled from the moment the status of the activity becomes Accepted until the moment the visit is finalized.
- Moving an activity is only enabled when status of the activity is not yet **Completed**. It is also required the Service User Template assigned to the employee in LN has Reschedule Visits enabled.

Accepting an activity

To accept an activity:

1. Go to My Schedule page and select a visit and click on it to go to the activity list.
2. On the activity page, right-click the activity.
3. Click **Accept**. The status of the activity changes to **Accepted**.

Declining an activity

To decline a visit:

1. Go to My Schedule page and select a visit and click on it to go to the activity list.
2. On the activity page, right -click the activity.
3. Click **Decline**.
4. In the Decline Visit window, specify this information:

   Reason
   Select the reason for declining the visit. All reasons of type **Assignment Rejection** listed in Reasons (tcmcs0105m000) session are listed.

   Decline Text
   Specify the additional information for the reason to decline the visit, if required.

5. Click **Decline Visit**.

   Note: The **Accept** and **Decline** options in the bottom bar are enabled only if the Status of one of the activities of the visit is set to Assigned.

Completing an activity

To complete an activity:

1 Go to My Schedule page and select a visit and click on it to go to the activity list.
2 On the activity page, click **Complete** in the grid. Otherwise, right-click the activity and click **Complete** in the bottom bar.
3 The status of the activity changes to **Complete**.

Adding notes to an activity

To add a note to the activity:

1 Go to My Schedule page and select an activity.
2 On the activity page, click small balloon icon of any activity.
3 Specify the note (information) related to the activity
4 Click **Add**.

Editing notes

To edit the note linked to the activity:

1 Go to My Schedule page and select a visit and click on it to go to the activity list.
2 On the activity page, click small filled balloon icon of any activity.
3 Select the note you want to modify from the list. The note content is displayed in the text box.
4 Add or modify the information
5 Click **Update**

Starting and stopping an activity

You can click **Start** / **Stop** to register the actual start and finish time of the activity.

Based on the status of the activity, you can **Start**, **Stop** or **Complete** the activity.

- If the activity status is **Accepted** and you click **Start** (for the first time), the actual start time is registered and the activity status is set to **Started**. The back-office planner receives an indication that you have started the activity.

- If the activity status is **Started** and you click **Stop**, the actual stop time is registered and the activity status is set to **Stopped**. This indicates that you have stopped the activity.
- If the activity status is **Stopped** and you click **Start** (for the second time), the activity status is reset to **Started** and the actual stop time is cleared.
- If you click **Complete**, the completion time is registered and the status is set to **Completed**.

  Note: When you click **Pause** or **Complete** option, the data synchronization with Infor LN is triggered only if the **Send and receive data when pausing or completing an activity** field is set to **Yes** on the Send/Receive settings.

Adding an Activity

To add an activity:

1. Go to My Schedule page and select a visit and click to go to the visit page.
2. On the Visit page, click **+**.
3. Fill the activity description, **Service Type** and optionally the remaining fields.
4. Click **Add Activity**.

Editing an Activity

To edit an activity:

1. Go to My Schedule page and select a visit and click to go to the visit page. .
2. On the activity list, right-click the activity.
3. Click Edit.
4. In the Edit Activity bar the activity can be edited.

Moving an Activity

To move an activity:

1. Go to My Schedule page and select a visit and click to go to the visit page.
2. On the activity list, right-click the activity.
3. Click **Edit**.
4. In the Edit Activity bar the **Planned Start Date**, **Planned Start Time**, **Planned Finish Date** and **Planned Finish Time** can be edited.

Note: When a visit has multiple activities, moving a single activity might cause the visit to be broken up into separate visits. This would happen if a visit to another customer is planned between the remaining and moved activities of the current visit.

Tasks and Inspections

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This section displays an overview of the tasks and inspections that is to be performed for the current assigned activity. In this section, you can perform basic actions like task performed, update spent hours and enter inspections.

The left bar contains the following information:

- The date, start time, finish time of the assigned activity
- A picture, code, description, serial number, alternative serial number of the top-item of the activity
- Tabs for the
  - Tasks and Inspections
  - Materials
  - Travel Time and Other Costs
  - Diagnosis – Information for diagnosing the current activity.
  - Documents – To view attached documents of the service order.

The user can update the duration of a task. The start time is based on the planned start time, but can also be adjusted by the user in the Edit Task bar.

You can perform following action on this section:

- "Adding a task" on page 29
- "Adding an inspection" on page 30
- "Completing a task or an inspection" on page 31.

Adding a task

To add a task:

1 On the My Schedule page, select the appropriate visit and thereafter the appropriate activity.
2 On the Task and Inspection page, click **+**.
3 Select the **Add a Task** option.
4 Select a **Task** from the list and fill the remaining fields.

5 Click **Add Task**

Adding an inspection

To add an inspection:

1. On the Schedule page, select the appropriate visit and thereafter the appropriate activity.
2. On the Task and Inspection page, click **+**.
3. Select the **Add an Inspection** option.
4. Specify the required information. Note that the instruction text of the measurement will only appear if it is not empty.
5. Click **Add an Inspection**.

Linking a document to an inspection

Execute the following steps to link a document to an inspection:

1. On the Schedule page, click on the appropriate visit.
   The Visit screen is displayed.
2. Click on the appropriate activity.
   The Activity screen is displayed.
3. Select the appropriate inspection by a right mouse click or a long press.
   The bottom bar pops up.
4. Click the **Documents** button.
   The Inspection Documents screen is displayed.
5. Click the folder button.
   The explorer window opens.
6. Select the document (or picture) to link and click **OK**.
7. The document is now linked to the inspection and is available in the list. Go back to the Tasks and Inspections screen by clicking the back button.

   Note: To be able to link a document, a document management system must be in place for Infor LN.

Linking a photo to an inspection

Execute the following steps to link a photo to an inspection:

1 On the Schedule page, click on the appropriate visit.
The Visit screen is displayed.
2 Click on the appropriate activity.
The Activity screen is displayed.
3 Select the appropriate inspection by a right mouse click or a long press.
The bottom bar pops up.
4 Click on the **Documents** button.
The Inspection Documents screen is displayed.
5 Click on the **photo** button.
The standard camera application of the system is started.
6 Take the photo.
7 The photo is now linked to the inspection and is available in the list. Go back to the Tasks and Inspections screen by clicking the back button.

Note: To be able to link a photo, a document management system must be in place for Infor LN.

Completing a task or an inspection

To complete a task or an inspection:

1 Go to the Task or Inspection.
2 Click  to indicate that the task or the inspection is complete.

Register material

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This page is used to view and register material costs for a service order. All the material cost lines associated with the current service order activity, are also displayed.

For each material cost line, the user can change the quantity and modify the details of a material cost line. The user can click **+** to add new material cost line to the current activity.

It is also possible to order materials and have them added as material cost lines.

The Register Material screen displays the following details:

- The first group Used Materials.
- A second group with Returned Materials.
- A third group with Scrapped Materials.
- A fourth group with Ordered materials.
- A picture of the Item / Serialized Item.
- The Item Description and the Serial Number.
- The (actual/estimate) quantity.
- The **+** and **-** buttons to change the used quantity

You can perform these actions:

- "Adding a material" on page 33 to the current activity
- "Editing material lines" on page 34
- "Ordering material lines" on page 34

Adding a material

To add a material to the activity:

1. Go to My Schedule page and select an activity.
2. On the activity page, click an activity.
3. In the side bar column, click **Materials**.
4. Click **+**

5 Specify the required information.
6 Click **Add Material**.

Editing material lines

To edit a material line:

1. Go to My Schedule page and select an activity.
2. On the activity page, right-click an activity.
3. In the side bar column, click **Materials**.
4. Click **+** and **-** to increase or decrease used material quantity. You can also manually specify the quantity.
5. Click on the **Confirm** icon behind the material line. The modified quantity is added to the **Total** quantity field.

   You are only allowed to use materials from the warehouses you are authorized to in the user template in LN Service.

Ordering material lines

To order a material line:

1. Go to My Schedule page and select an activity.
2. On the activity page, right-click an activity.
3. In the side bar column, click **Materials**.
4. Click **+**.
5. Select **Order Material** from the drop box at the top of the material cost detail panel.
6. Specify the required information.
7. Click **Add Material**.
   The new material cost line will be shown in the Ordered materials group.
8. Click **+** and **-** to increase or decrease ordered material quantity. You can also manually specify the ordered quantity.
9. Click on the **Confirm** button behind ordered material line to order the material.

   When the order of such an ordered line has been processed and shipped, the material cost line will shift to the Used materials group.

Register Travel and Other cost

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You can use this page to view and register miscellaneous cost for a service order. The cost lines with several cost types such as tool, travel and other are also displayed.

The first group shows the Travel Time and the second group the remaining Other Costs.

You can right-click on a cost line to start the Edit mode to modify the details of a cost line. You can click **Plus** to add a new cost line to the current activity.

The Travel Time group contains these details of the cost line:

- The start time
- The end time
- The duration
- Task. The task of the Travel Time is shown in the Edit Travel Time panel. See the Editing other cost section in this chapter.

The Other cost group contains these details of the cost lines:

- The cost type and the quantity unit
- The description of the cost line
- The (actual/estimate) frequency and quantity
- **+** and **-** to change the used quantity.

You can perform the following action on this section:

- "Adding other cost" on page 35
- "Editing other cost" on page 36
- "Deleting other cost" on page 36

Adding other cost

To add an other cost to an activity:

1. Go to My Schedule page and select an activity.
2. On the activity page, click an activity.

3 In the side bar column, click **Other Costs**.
4 Click **+**
5 Specify the required information.
6 Click **Add Cost**

Editing other cost

To edit a other cost line:

1 Go to My Schedule page and select an activity.
2 On the activity page, click an activity.
3 In the side bar column, click **Other Costs**.
4 Select an activity on the Other Costs page.
5 Right Click and select **Edit**.
6 Specify this required information.
7 Click **Update Cost**.

Deleting other cost

To delete a other cost line:

1 Go to My Schedule page and select an activity.
2 On the activity page, click an activity.
3 In the side bar column, click **Other Costs**.
4 Right Click to select an other cost line on the Other Cost page.
5 Click **Delete**.

Diagnosis

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This page is used to view and edit the diagnosis information for a service order activity. The information such as the reported problem, expected problem and solution, actual problem and solution codes (and/or description), text fields for the problem and solution, notes, and a comment text box for the current activity are displayed. The information specified on this page can be used for problem and solution analysis and statistics.

The Diagnosis page displays these details:

- Service Order header text
- Reported problem. This is the problem (code) as reported by the customer.
- Expected problem. This is the expected problem as specified by the person receiving the service call.
- Expected solution
- Actual problem
- Actual solution
- Diagnosis notes

Note:

- The **Reported Problem**, **Expected Problem**, and **Expected Solution** fields are applicable only if the service order activity is linked to a service call. Else, these fields are not visible.
- The **Reported Problem**, **Expected Problem**, **Expected Solution**, **Actual Problem**, and **Actual Solution** are visible only if the **Use Diagnostics** field is selected in the General Service Parameter (tsmdm0100m000) session.
- If the status of the activity is **Assigned**, **Declined** or **Completed**, this page is a display page.
- You cannot modify notes specified by the other engineers.

You can perform these actions:

- "Adding notes" on page 38
- "Editing notes" on page 38

Adding notes

To add a note:

1. Go to My Schedule page and select an activity.
2. On the activity page, click an activity.
3. In the side bar column, click **Diagnosis**.
4. Click **Note**.
5. Specify the required information
6. Click **Add**.

Editing notes

1. Go to My Schedule page and select an activity.
2. On the activity page, click an activity.
3. In the side bar column, click **Diagnosis**.
4. Click **Note**.
5. Select a note.
6. Add or modify the information
7. Click **Update**

Documents

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You can use this page to download/upload and view the documents related to a service visit, such as installation manuals, technical drawings. These documents are stored in a Document Management System (DMS) and are related to service orders, service order activities, (serialized) items and reference activities available in LN. The Document Management HUB is used to integrate Mobile Service with a Document Management System. If the Document Management HUB is not configured for the Mobile Service, the Document screen is not visible and document cannot be viewed, downloaded or uploaded in Mobile Service.

Note: Every time the application is started, DMS integration with LN, is checked.

The Documents screen can be started from the Visit or the Activity pages.

When the Document page is accessed from the Visit page, all the documents linked to the service order activity that are part of the current visit and all the documents linked to the reference activities and configurations (items) of each activity, are displayed. The documents linked to the service order and the finalized visit report documents (pdf) are also displayed.

When the Document page is accessed from the Activity page, all the documents linked to this activity and the documents linked to reference activities and configuration (item), are listed. A new document is attached to the current activities.

For each document the file name, size, and last modification date is listed. The icon that indicates if the document is ready to be opened and viewed, or the document is available for download, or if a newer version can be downloaded is also displayed.

This page allows you to:

- "Attaching a document" on page 39
- "Downloading a document" on page 40

Attaching a document

To attach a document to an activity:

1. Go to My Schedule page and select an activity.
2. In the side bar column, click **Documents**.

3 Click on one of the two Icons with a **+** indicator to browse to the file explorer or to start the camera
4 Browse and select the document or make a picture with the camera.
5 Click **Open** in the file explorer or OK in the dialog with the taken picture.

   Note: After synchronization, the document is available in the Document Management System.

Downloading a document

1 Go to My Schedule page and select an activity.
2 In the side bar column, click **Documents**.
3 On the Documents page, Right Click and select a document.
4 Click **Download**.

   Note: You can also click button in the list to download the document.

Visit report

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This section displays a report of the activities performed for the visit and all the cost that are associated with the visit. The engineer can generate this report after the completion of the work on the visit. The activities and the cost lines that are managed by the current engineer are displayed on the report.

The visit report contains the cost lines with quantities and hours. The value of the costs amounts are not displayed if a coverage is applicable. In this case the coverage reason is displayed (Warranty, Contract, Quotation or Discount). Amounts of material costs are not displayed if the logistic procedures is not yet completed in LN, such as the issue from inventory. In this case the amount is displayed as Unavailable.

The visit report can be signed-off by both the engineer and the customer. The signatures are attached to the (pdf) report and stored as document in LN and in the Document Management System, if applicable.

The layout of the default visit report includes amongst others:

- The service department address, service order, date and assigned engineer
- The location address and the invoice address
- An overview of the invoice amounts per group (materials, labor and others)
- The comments from the engineer and the customer
- The signatures from the engineer and the customer

For each activity, the default report contains:

- The activity description and the invoice amount for the activity
- The used materials (Quantity, Item, Description and Amount)
- The labor details (Hours, Task description, Engineer and Amount)
- The others details (Quantity, Cost type, Description and Amount)
- The Diagnosis section that includes
    - Reported problem, Expected problem and Expected Solution
    - Actual problem and Actual Solution
    - Comments

Viewing a visit report

To select a visit report:

1. Go to My Schedule page and select a visit.
2. In the side bar column, click **Report**.
3. Click the **Select Activities** icon if the Select Activities screen is not displayed.
4. (De)select one or more activities from the list of activities.
5. Click **Confirm**.

   The detailed report is displayed on the screen.

   Note: If the visit is already signed-off, the report is shown as soon as you click on the Report page.

Changing the language of a visit report

To change the language of a visit report:

1. Go to the My Schedule page and select a visit.
2. In the side bar column click **Report**.
3. On the report page, click the select activities icon.
4. Change the **Visit Report Language** field in the select activities bar.
5. Click **Confirm**.

   Note: Once the visit report is finalized, the visit report language cannot be changed.

Finalizing the visit report

To sign the visit report by engineer:

1. Click **Signature** icon.
2. Click **Edit** option located below the Engineer signature section.

   Starts the Sign Off section.
3. Specify this information:

   Engineer Signature
   Sign in the **Engineer Signature** text box. You can click **Undo** to clear the signature.

   Engineer Name
   Specify the name of the engineer

Comment
Specify the additional information, if any.

4 Click **OK**
5 To sign the visit report by customer:
6 Click **Signature** icon.
7 Click **Edit** option located below the customer signature section
Starts the Sign Off section
8 Specify this information:

Customer Signature
Sign in the **Customer Signature** text box. You can click **Undo** to clear the signature.

Customer Representative Name
Specify the name of the customer representative

Comment
Specify the additional information, if any.

9 The signatures appears in the right pane after both the engineer and the customer confirm the signatures. Click **Finalize**

The signatures, names and comments are displayed on the visit report and a pdf of the visit report is generated. No changes can be made to this document anymore and the **Signature** option on the visit report screen is disabled.

Mobile Service contains one default visit report. It is possible to change the layout of the default visit report in Infor LN and you can also define different reports by customer or service department. These visit report templates are maintained in tsmdm5100m000 session. You must first download the report template and thereafter, change the template. See chapter 'How to make a visit report'.

Note: A template is a file with a Rich Text Format (.rtf) extension and can be adjusted with any program that supports this extension, like MS Word, Open Office, and so on. If the template has been adjusted, you must upload the template again. The available templates are synchronized automatically to the local Mobile Service application.

Note: Signature are lost if the report is not finalized.

How to create a visit report template

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General

A visit report is based on a template. The template is composed of plain text, images and placeholders. The required report is displayed after the actual visit data is populated in the template.

The visit data consists of several data sets. The template must be composed in such a way that it will correspond with these data sets. Every data set contains zero, one or more rows. In the template. these rows are represented by a single row definition.

The template is stored as a rich text document (.rtf) and can be created with a text processor that can edit rtf files.

This manual uses the layout of the default template in all the samples and figures. The complete default template is added in "appendix 2" on page 69 . The default template is also available in LN in the visit report template (tsmdm5100m000) session.

For a better view of the nested tables. See the "Tips" on page 50 paragraph.

Text and Images

When creating a template the base elements are text and images. When translations is not required, literal text will do. In the default template, translation placeholders are used. This is not required.

Layout elements can be tabs, tabs at a user defined position and tables. Both Word and rtf files support these layout elements. Character and paragraph formatting are also supported.

Replaceable text and values must be defined by placeholders.

Placeholders

Placeholders are defined by using text within markers. There are four types of placeholders, each identified by different markers.

Notation	Placeholder Types
<<placeholder name>>	Translated text
##placeholder name##	Data item from a data set
%%placeholder name%%	Image from a data set
[[data set identifier]]	Data set identifier

Example:

##DepartmentName##	<<Order>>	##ServiceOrder##
##DepartmentAddress##	<<OrderReference>> <<StartTime>> <<ServiceEngineer>>	##ReferenceA## ##StartTime## ##Engineer##

In this example <<Order>>, <<OrderReference>>, and so on, are a translatable text placeholder. Translation is depended on the language selected in (LN). ##DepartmentName##, ##ServiceOrder##, and so on are data items. These data items are retrieved from the document level data set. As the document data set is generally available, these placeholders can be used anywhere in the document. For a list of all placeholders, see "appendix 1" on page 63.

The example above can result in the following merged lines.

NL Service Department	Service Order	SOO001407
Het Torentje Binnenhof 19 2513 AA Den Haag Zuid Holland The Netherlands	<<OrderReference>> <<StartTime>> <<ServiceEngineer>>	15-8-2016 10:28:01 Willem Wilmink

Data sets

The visit report contains five data sets.

- Document data
- Activity data
- Material cost data, with a reference to Activity data
- Labor cost, with a reference to Activity data
- Other cost, with a reference to Activity data

Data sets can hold any type of information such as text or images. The markers around the placeholders (## for text and %% %% for images) determine how the data is displayed.

Although materials, labor and other cost are linked to an activity, it is possible to show the list of all the cost of all the activities..

Document data set

This data set holds information about the visit and is available over the whole document. This set also contains images. The signature placeholders are the only supported image placeholders.

Activity data set

The activity data set identifier is [[Activities]]

This data set holds data for the activities which are selected by the user when generating the report.

Material cost data set

The material cost identifier is [[MaterialCost]]

This data set holds data of all material cost. These are the costs entered in the Material screen. The display of material cost of one or more activities is based on how the material cost is defined in the template.

Labor cost data set

The labor cost identifier is [[LaborCost]]

This data set holds data of all labor cost. These are the costs entered in the Task and Inspection screen. The display of labor cost of one or more activities is based on how the labor cost is defined in the template.

Other cost data set

The other cost identifier is [[OtherCost]]

This data set holds data of all other cost. These are the costs entered in the Travel Time and Other Cost screen. Data for both Travel Time and Other are displayed here. The display of other cost of one or more activities is based on how the other cost is defined in the template.

Layout

Basically placeholders can be placed anywhere in the rtf document. So a construction like

Service order number ##ServiceOrder## has a start date of ##StartDate##.

is completely valid.

To be able to align elements, tabs or tables can be used. Tables can be inserted.. Columns and or rows can be merged. For instance, a table of two rows with in the first row having one cell and the second row having three cells , is valid.

<<SomeTranslatedText>>		
##FieldA##	##FieldB##	##FieldC##

The layout is show above will retrieve Field A, B and C from the document data set.

To be able to display data from any other data set, a layout convention must be followed. All data set dependent placeholders must be inside a table. The data set identifier is key to the layout convention. The identifier must be placed in the first row in the first cell as the first text in this table.

Data set layout convention:

[[DataSetIdentifier]]		
<<HeaderTextA>>	<<HeaderTextB>>	<<HeaderTextC>>
##FieldA##	##FieldB##	##FieldC##

The data set convention defines three or more rows.

- The first row must hold the data set identifier (with [[ ]] markers). See also, the data set definition provided earlier in the document.. When the data set identifier is not found, the table is handled as a layout table. See above.

  The data set identifier row is deleted after the merge is executed,

- The last row is replicated as many times as the data set hold rows. Data placeholder of each replicated row is replaced with the corresponding data set row values. If the layout row contains data placeholders which do not correspond with the data set properties, replacement takes place using the parent data set. If no match is found in the parent data set, the placeholder is matched and possibly replaced with the document data set values.
- All other rows are header rows (zero, one or more). The header rows usually contain translatable text placeholders (<< >>). If the header rows contain data placeholders, data is replaced from the parent data set. If not applicable, placeholders are replaced with data from the document data set.

The minimum requirement for a data set table is two rows. Header rows are optional.

Example:

[[MaterialCost]]			
<<Materials>>			
<<Quantity>>	**<<ItemCode>>**	**<<ItemDescription>>**	**<<Amount>>**
##Quantity##	##Item##	##Description##	##AmountOrCover-age##

or

[[MaterialCost]]			
##Quantity##	##Item##	##Description##	##AmountOrCover-age##

In the first example material cost is presented with two header rows. In the second example, header rows are not present.

Nested Layout

In order to be able to represent parent/child relations, an extra convention is defined. In the case of activities and materials, if materials per activity must be presented, the material table must be nested in the activity table. Data sets have a structure to recognize if used as a child set. Instead of presenting all the material of a visit, only the material for the current activity are presented in the nested material tables.

Note: Be careful when inserting the nested tables in the last row. If more than one table is required (for instance material, labor and other cost), the tables can be inserted in the same cell with a paragraph ending (just a RETURN) in between. See also the layout of Materials - LaborCost - OtherCost in "appendix 2" on page 69.

In Word, this is easy to accomplish. Set the cursor in a table cell and select 'Add table' from the INSERT tab.

Nested data set layout convention:

Example:

[[DataSetIdentifier]]		
<<HeaderTextA>>	<<HeaderTextB>>	<<HeaderTextC>>
##FieldA##	##FieldB##	##FieldC##

[[DataSetIdentifier]]		
<<HeaderTextX>>	<<HeaderTextY>>	<<HeaderTextZ>>
##FieldX##	##FieldY##	##FieldZ##

[[Activities]]			
<<Activity>> (##ActivityPk##)			
[[MaterialCost]]			
<<Materials>>			
<<Quantity>>	**<<ItemCode>>**	**<<ItemDescription>>**	**<<Amount>>**
##Quantity##	##Item##	##Description##	##AmountOrCover-age##

In the example above a material cost ([[MaterialCost]]) data set is nested in an activity data set ([[Activities]]). The ##ActivityPk## is retrieved from the Activities data set. ##Quantity##, ##Item##, ##Description## and ##AmountOrCoverage## are retrieved from the MaterialCost data set.

Result:

Activity (V01002310:10)

Materials			
Quantity	**Item Code**	**Item Description**	**Amount**
8 pcs	AVDK17	PUR Item from car	Warrenty
3 box	AVDK1501	Plugs S8 Item from serv. inv.	9,00 EUR

Totals

For each data set which represents costs, totals are calculated. In the default template, these totals are presented in the summary paragraph.

The placeholders Totalxxx and GrandTotal displays values of all the cost of the selected activities. The detail lines of these costs do not necessarily have to be presented in the report. At the other hand, TotalDetailxxx and GrandDetailTotal contains values from only the detail cost lines.

In this way, the customer can decide to display only the totals without details, or display the detail and then displays the totals of these details.

Tools to edit the template

The template must be stored as an rtf file. Microsoft Word can handle this type of file although there are a other text processing applications which also can edit this file type. After creating the template, the file must be stored as .rtf document.

Note: Although the layout on the screen might look the same, there are differences between text processors (and also the application) in printed output. So, if you use preprinted paper, test the template with real data, saved as pdf.

Fixed price

The LN backend supports the fixed price per activity functionality. The report supports fixed price in a basic manner. The fixed price is not a field (as to present in the report), but is represented as total.

Prices are calculated in the LN backend. These prices are synchronized to the app. By definition, if an activity has a fixed price, all individual costs are set to zero. In this way the totals and the grand total would always be zero. The report replaces the totals with the fixed price amount.

In case cost is not calculated as zero, these costs are added to the fixed price amount.

Location of the default template

Templates are managed in LN in the Visit Report Templates (tsmdm5100m000) session. In this session, it is possible to import and export templates. This session can also generate the default template, as added in "Appendix 2" on page 69.

Tips

Editing placeholders

When adding or changing placeholders, type out the entire placeholder in one action, don't change any individual characters, as Word sometimes adds some invisible markers in the rtf document. If so, the report merger cannot be able to interpret the template in the right way., and the placeholder is not replaced in the visit report. For placeholders which are spelled correctly but don't show the merged value, edit the template document and retype the placeholder from start to finish including the front and end markers.

Tables with invisible borders

When the amount of data to be displayed is little, it is recommended to not display some or all of the borders of a table. All editors allow individual borders to be invisible.

MS Word settings

When using Word as editor, it is advisable to use the Web Layout view. From the Menu bar, select the **VIEW** tab, the click the Web Layout view. The tables borders beyond the right margin of the paper are visible and can be edited.

The cell gridlines must also be displayed. By default, this feature is not enabled. Use the border layout option in the HOME tab and click **View gridlines**. The borders with no visible line, are represented as a dotted line.

Hours

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From the top bar you can start the Hours overview. This view displays all the registered hours on service orders and all the registered General Hours by week. In the Settings View, you can specify the number of weeks in the past and in the future for which you would like to view the hours.

In the header the total number of booked hours and the employment hours are displayed. All the hours already registered for that week and the totals for each day of the week, are also visible.

It is possible to add or change General Hours by clicking on the plus sign. The fields general task, labor type, day of the week and duration are mandatory fields and cannot be left empty.

It is not possible to add or change service hours. That needs to be done on the service order itself in Mobile Service.

Inventory

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You can start the Inventory overview from the menu bar. The Inventory overview includes;

- Bench Stock
- Inventory by item
- Inventory by Warehouse

Bench stock

For a Bench Stock item inventory management is not required. Therefore the:

- **Delivery Type** field in the **Service Control** group box is set to **From Service Inventory** in the Items - Service (tsmdm2100m000) session.
- **Inventory Management for Bench Stock** check box for service employee's **Service Car** field is cleared in the Service Car (tsmdm1145m000) session.

The header displays a list of authorized warehouses for the service engineer. By default, the warehouse linked to a service engineer's car, is displayed. If you modify the data of the linked warehouse, the updated data is displayed when you restart the session.

To order bench stock items using Mobile service:

1. Specify the required quantity in the **Quantity** field of the items which require additional stock.
2. Click **Order Now**. By default, the synchronization process is started. To prevent the synchronization, you must clear the **Send and receive data when ordering bench stock** check box on the **Send/Receive** tab. in the Settings view.
3. Infor LN creates a manual warehouse transfer order to transfer the items from the central warehouse to the car. The On Order quantity field displays the quantity that is already ordered.

Inventory by Item

To view the inventory by item, select the **Inventory by Item** option in the Inventory screen. You can view the On Hand and the On Order inventory available for the selected item in the selected warehouse. To view the inventory for a particular item, select or specify the item in the Inventory screen header.

Note: Inventory data is displayed based on the last synchronization.

Inventory by Warehouse

To view the inventory by warehouse, select the **Inventory by Warehouse** option in the Inventory screen. You can view the On Hand and the On Order inventory available for the selected items in the selected warehouse. By default, the warehouse linked to an engineer's car is displayed. To view the inventory for a particular warehouse, select or specify the warehouse in the Inventory screen header.

Note: Inventory data is displayed based on the last synchronization.

Calls

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. You can use calls to notify back office of :

- Additional work
- Opportunities at customer site
- Any other communications

To open the Call screen:

1. Click the **Hamburger** icon in the application homepage.
2. In the top bar, select **Calls**.

Adding a call

1. Click the **(+)** icon in the Call screen.
2. In the Add Call screen, specify a description of the call in the **Description** field. This is a mandatory field.
3. Optionally, you can also specify information for these fields
   - Business Partner
   - Item
   - Serial Number
   - Comment. This field can be used to provide a more detailed description of the call.
   - Expected Problem
   - Expected Solution
   - Reported Time. By default, the current date and time is added to this field.
   - Click Add Call. The call is now displayed in the calls list with the status Registered.

   Note: To cancel the process of adding a call, click the icon in the Add Call screen.

Editing a call

1 Select a call from the call list in the Call screen.
2 In the menu bar click **Edit**
3 In the Edit call screen, specify the modifications.
4 Click **Update call**.

Note:

a To cancel the process of editing a call, click the icon in the Call screen.
b You can edit a call only if the status is set to Registered, Assigned or In process.
c You cannot modify the reported time after the call is synchronized with Infor LN.

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Deleting a call

1 Select the calls to be deleted, in the Call screen.
2 Click **Delete**, at the bottom of the screen.

Note: A call can be deleted, only if its status is set to registered.

Serial history

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You can start the serial history overview from the top bar. Alternatively, serial history can be started from an icon in the Visit and Activity header or from the individual activity, material or inspection row. On the right side of each serial number an icon (like a clock with a reverse arrow) is shown.

The serial history overview includes

- Serial history for orders
- Serial history for inspections

When serial history is activated from the top menu, the user must enter an item and serial number. After both are entered, the history is shown. Notice that only the history of serialized item is available for serialized items which are references in any visit in your agenda and only then when in the settings serial history is set to automatically download data.

If no history is shown it is possible to refresh the data by clicking the refresh button in the upper right part of the screen. This will need an active connection to Infor LN.

If the history icon from any other screen is used to go to serial history, the serial number from that screen is used to activate the serial history filter.

Use the i (information) button to show more data from any part of the serial history. The information pane can be left expanded to browse through different parts of the serial history. Just click on any part of the serial history list.

Serial history for orders

Orders will show a hierarchical view of the serial history, order by order. The hierarchy is set by Order - Activities - (Tasks - Materials - Inspections group) - detail about these groups.

Notice that only those inspections are shown which are related to the order (this also counts for materials and tasks). Inspections that are not order related can be shown in the serial history Inspections view.

Serial history for inspections

The inspections view only shows individual inspections. In this view the inspections which are not related to any order, are also shown.

Information Panes

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Information panes are displayed throughout the application. An information pane provides the additional details, of the active screen. For example, in the Visit screen, the information pane displays the Sold-to Contact and the Ship-to Contact details related to the visit.

To view an information pane, click **(i)** In any screen, click the arrow option to expand or collapse the information pane.

.

Summary of placeholders

A

Document

- DepartmentName
- DepartmentAddress

  10 row formatted address according to the backend address formatting rules.
- ServiceOrder
- StartTime

  Actual start time of the first activity
- StartTimeDateOnly

  Actual start time of the first activity, without the time part.
- ServiceEngineer
- ServiceAddress

  10 row formatted address according to the backend address formatting rules.
- SoldToBusinessPartnerName
- BillingAddress

  10 row formatted address according to the backend address formatting rules.
- InvoiceToBusinessPartnerName
- Item

  Item code.
- ItemDescription

  Item description
- SerialNumber
- SerialNumberDescription
- Project
- ProjectDescription
- OrderFixedPriceAmount: Amount including currency. If PricingMethod is not Fixed Price this field is hidden.
- OrderFixedPriceTaxAmount: Amount including currency. If PricingMethod is not Fixed Price this field is hidden.

- OrderFixedPriceAmountAndLabel: Amount including currency preceded by a text and colon. If PricingMethod is not Fixed Price this field is hidden.
- OrderFixedPriceTaxAmountAndLabel: Amount including currency preceded by a text and colon. If PricingMethod is not Fixed Price this field is hidden.
- Priority

  The priority of the visit
- SoldToContact
- SoldToContactName
- SoldToContactTelephone
- SoldToContactEmail

Special placeholders

Totals which displays total values of all costs independent of if the details line are displayed or not.

- TotalMaterialCost
- TotalMaterialCostTax (not in default template)
- TotalLaborCost
- TotalLaborCostTax (not in default template)
- TotalOtherCost
- TotalOtherCostTax (not in default template)
- TotalInvoice
- TotalTax
- GrandTotal

Note: TotalInvoice, TotalTax and GrandTotal is calculated by adding the individual totals and including the fixed price value (if any). In general, if a fixed price value is set, all detail amounts are zero.

Totals of costs which are presented in the detail lines.

- TotalDetailMaterialCost
- TotalDetailMaterialCostTax (not in default template)
- TotalDetailLaborCost
- TotalDetailLaborCostTax (not in default template)
- TotalDetailOtherCost
- TotalDetailOtherCostTax (not in default template)
- TotalDetailInvoice
- TotalDetailTax
- GrandDetailTotal

Note: TotalDetailInvoice, TotalDetailTax and GrandDetailTotal is calculated by adding the individual totals and including the fixed price value (if any). In general, if a fixed price value is set, all detail amounts are zero.

Document placeholders available after finalization of the visit

The following placeholders are available after the visit is finalized.

Text placeholders

- EngineerComments
- CustomerComments
- CustomerName

Image placeholders (represented by %%placeholder%%)

- EngineerSignature
- CustomerSignature

Activities

- ActivityLine
- ReportedProblem
- ExpectedProblem
- ExpectedSolution
- ActualProblem
- ActualSolution
- ActualProblemComment
- ActualSolutionComment
- Description
- Item - Item code.
- ItemDescription - Item description
- SerialNumber
- SerialNumberDescription
- FixedPriceAmount - Amount including currency. If PricingMethod is not set to Fixed Activity Price this field is hidden.
- FixedPriceTaxAmount - Amount including currency. If PricingMethod is not set to Fixed Activity Price this field is hidden.
- FixedPriceAmountAndLabel - Amount including currency preceded by a text and colon. If PricingMethod is not set to Fixed Activity Price this field is hidden.
- FixedPriceTaxAmountAndLabel - Amount including currency preceded by a text and colon. If PricingMethod is not set to Fixed Activity Price this field is hidden.
- Priority

  The priority of the activity
- ShipToContact
- ShipToContactName
- ShipToContactTelephone
- ShipToContactEmail

- Contract
- ContractDescription
- Warranty
- WarrantyDescription
- CoverageType
- CoverageTypeDescription
- ActualStartTime
- ActualFinishTime

Material

- Quantity - The quantity of the material, including unit.
- Item - Item code
- Description - Item Description
- SerialNumber
- SerialNumberDescription
- AmountOrCoverage

  The invoice amount, as calculated by the backend including the currency. If the material has been changed after the last synchronization or has not been synchronized at all, the amount is not visible.

  If the amount is zero and a value is specified in the 'CoveredBy' field, the coverage type is displayed instead of the zero amount.
- Lotcode

Labor cost

- StartTime - The start time of the labor task.
- EndTime - The end time of the labor task. (This field is calculated based on the start time and duration of the labor task.)
- Duration - The duration of the labor task.
- LaborType - Translated labor type.
- Task - Task description
- OvertimeType - The overtime code.
- AmountOrCoverage

  The invoice amount, as calculated by the backend including the currency. If the labor cost has been changed after the last synchronization or has not been synchronized at all, the amount is not visible.

  If the amount is zero and a value is specified in the 'CoveredBy' field, the coverage type is displayed instead of the zero amount.

Other cost

- Quantity - The quantity of the material, including unit.
- CostType - CostType can be Other or Travel.
- Description - Other cost description. CostType Travel does not have a description.

- AmountOrCoverage

  The invoice amount as calculated by the backend including the currency. If the other cost has been changed after the last synchronization or has not been synchronized at all, the amount is not visible.

  If the amount is zero and a value is specified in the ‘CoveredBy’ field, the coverage type is displayed instead of the zero amount.

Inspections (not included in default template)

- Item - Item code
- ItemDescription
- SerialNumber
- SerialNumberDescription
- MeasurementType - Measurement type code
- MeasurementTypeDescription
- Position - Position code
- PositionDescription
- MeasuredValue
- MeasurementTime - Date and time of the measurement
- InspectionText - Additional text entered by the service engineer
- Inspections
- Inspection
- Item
- SerialNumber
- Position or MeasurementPosition
- MeasuredOn
- MeasuredValue
- MeasuredValueOrDescription
- MeasurementType
- MeasurementUnit
- InspectionText
- FixedPrice
- OrderFixedPrice

Text labels (used by <<placeholder>>)

- Order
- OrderReference
- StartTime
- ServiceEngineer
- … see <<placeholder>> in appendix 2

Default template

B

##DepartmentName##	**<<Order>>**	**##ServiceOrder##**
##DepartmentAddress##	<<OrderReference>> <<StartTime>> <<ServiceEngineer>>	##ReferenceA## ##StartTime## ##Engineer##

<<ServiceAddress>>	**<<BillingAddress>>**
##SoldToBusinessPartnerName## ##ServiceAddress##	##InvoiceToBusinessPartnerName## ##BillingAddress##

<<Summary>>			
<<Materials>>	**<<Labor>>**	**<<OtherCosts>>**	**<<Total>>**
##TotalMaterialCost##	##TotalLaborCost##	##TotalOtherCost## <<Tax>> <<Total>>	##TotalInvoice## ##TotalTax## ##GrandTotal##

<<EngineerComments>>
##EngineerComments##
<<CustomerComments>>
##CustomerComments##

%%EngineerSignature%%	%%CustomerSignature%%
##ServiceEngineer##	**##CustomerName##**
<<ServiceEngineer>>	<<CustomerName>>

[[Activities]]
<<Activity>> (##ActivityPk##)
[[MaterialCost]]
<<Materials>>

<<Quantity>>	**<<ItemCode>>**	**<<ItemDescription>>**	**<<Amount>>**
##Quantity##	##Item##	##Description##	##AmountOrCover-age##

[[OtherCost]]			
<<OtherCosts>>			
<<Quantity>>	**<<CostType>>**	**<<Description>>**	**<<Amount>>**
##Quantity##	##CostType##	##Description##	##AmountOrCover-age##

[[LaborCost]]			
<<Labor>>			
<<Hours>>	**<<LaborType>>**	**<<Task>>**	**<<Amount>>**
##Duration##	##LaborType##	##Task##	##AmountOrCover-age##

<<Diagnosis>>
<<ReportedProblem>>
##ReportedProblem##

<<ExpectedProblem>>	**<<ExpectedSolution>>**
##ExpectedProblem##	##ExpectedSolution##

<<ActualProblem>>	**<<ActualSolution>>**
##ActualProblem##	##ActualSolution##
##ActualProblemComment##	##ActualSolutionComment##