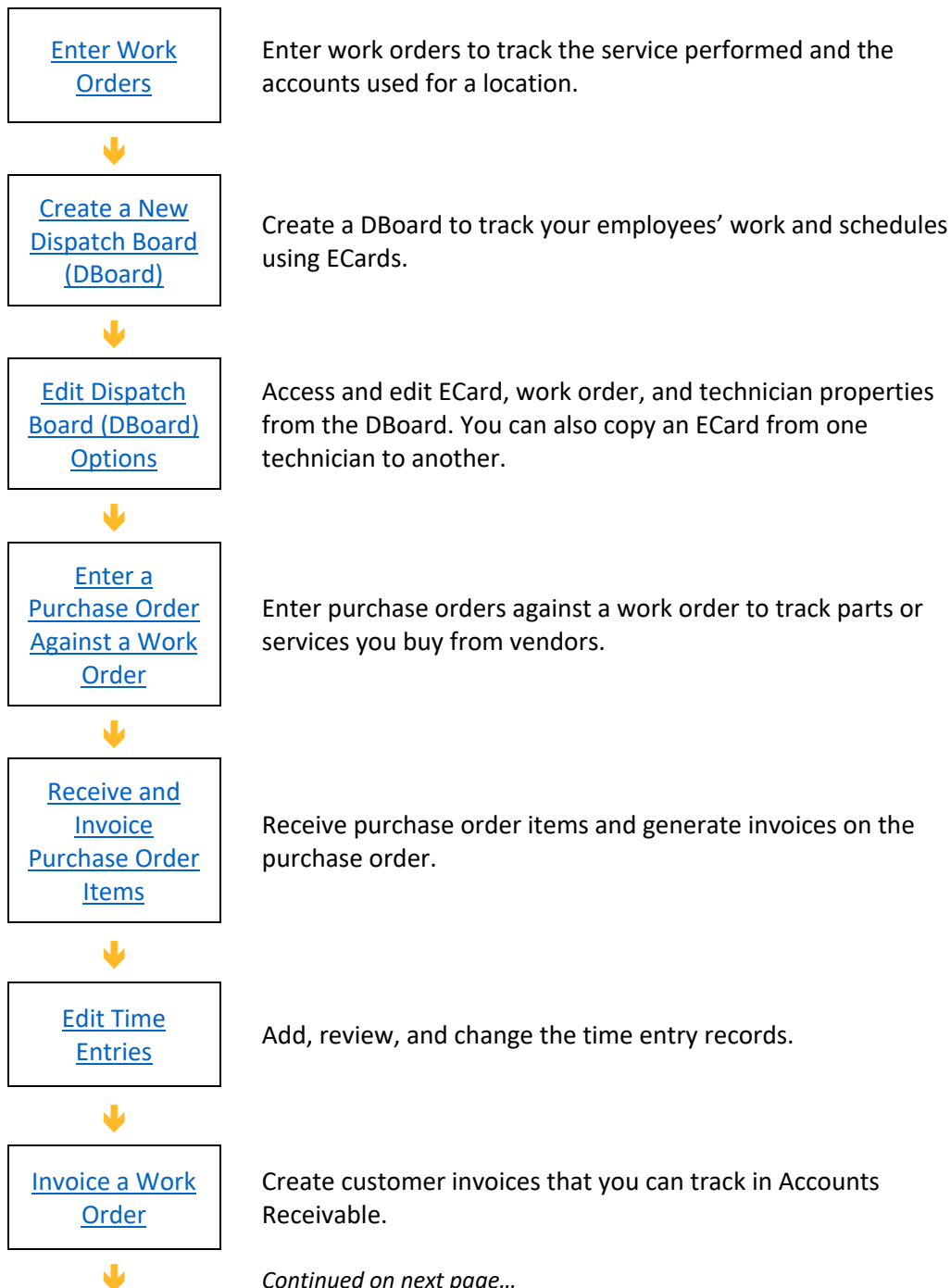
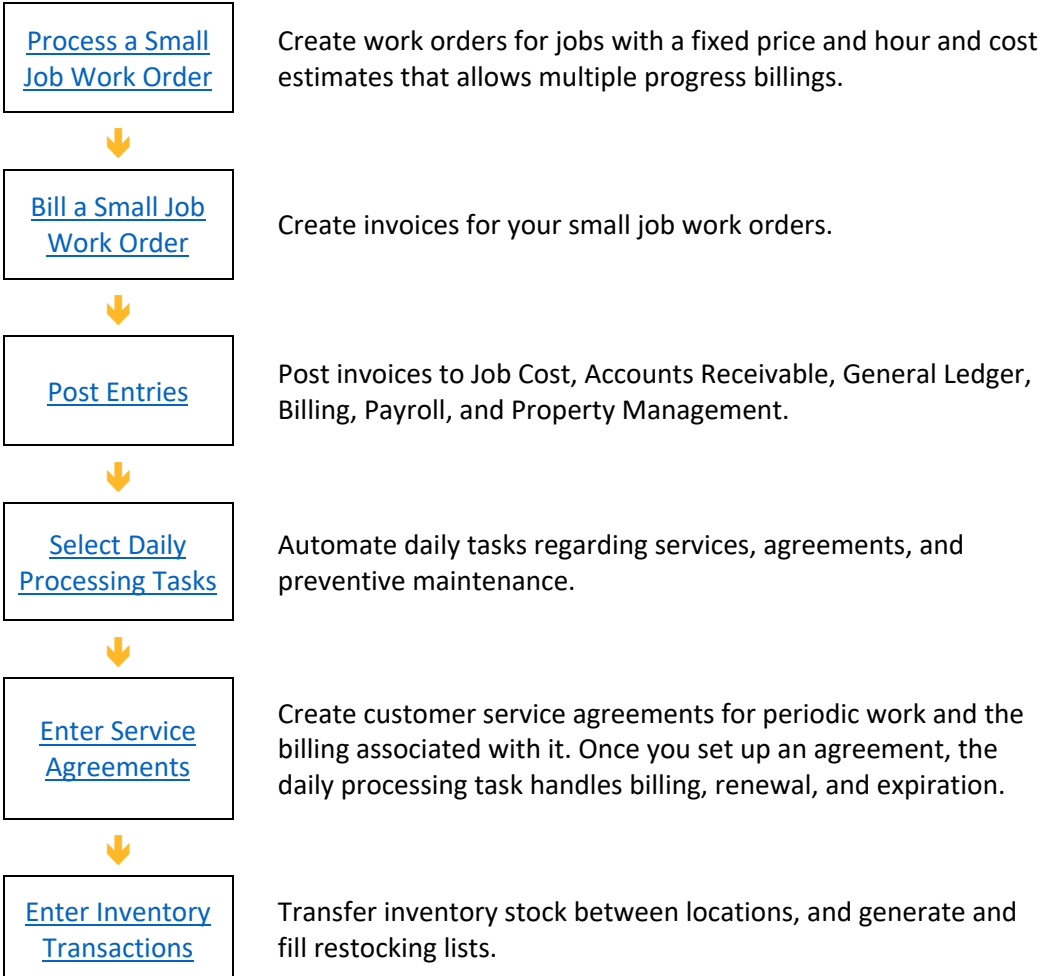


# Service Management

## Workflow Overview

The diagram below identifies the typical process for this task. For the most current and detailed information, refer to Help.





## Enter Work Orders

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic, “Create work orders.”

1. Select a location from one of the following views: **All Locations, Customers, Jobs, Properties, or Units**. Double-click the location.
2. Click [**New work order**].
3. Verify the information in the **New Work Order – Location** window. Click [**Next**].
4. Select the appropriate information in the **New Work Order - General** window. In the **Location comments** field, enter additional information about the work order. This information will print on the work order. Click [**Next**].
5. In the **New Work Order – Payment** window, verify the **Payment Method** and **Location of Sale**, then click [**Next**].
6. In the **New Work Order – Tasks/Todos** window select the **Standard Tasks** and any related **To Do** items. You may add **To Do** items required by this work order by clicking [**Add**]. Click [**Next**].
9. In the **New Work Order - Schedule** window, accept the defaults or make the appropriate selections, and then click [**Next**].



**Note:** You can also schedule the work order from the DBoard.

10. Select whether to preview or print the work order and click [**Finish**].

## Create a New DBoard

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic, “Display a DBoard.”

1. Select **DBoard > New**.
2. In the **Dispatch Board selector** window, enter the **Schedule date, Technician group, and Center** you want to display on the DBoard. Click [**OK**].



**Note:** You can have multiple DBoards open at one time.

## Edit DBoard Options

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics, “Edit assignments” and “Reassign - move an ECard.”

1. Right-click a technician name and select **Technician properties** to change technician status, or select **Add Ecard** or **Preview Daily Assignments**.

2. Right-click over the ECard to select **Ecard Properties, Work Order Properties, Location Properties, or Enter Purchase Order**. You can also create a time stamp by selecting one of the following options: Notified, Acknowledged, No Answer, Traveling, Started, Suspended, Complete.
3. Right-click and select **Copy Ecard** to copy it to another technician.

## Enter a Purchase Order against a Work Order



**Note:** We recommend that you select **Tasks > Synchronize Vendors from AP** to synchronize your vendors before you enter purchase orders.

The procedure below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Entry wizard” and “Inventory.”

1. You can enter a purchase order against a work order in three ways
  - a. Select the work order in the DBoard, right-click, and select **Enter Purchase Order**.
  - b. In the **Work Orders** view, right-click on a work order and select **Create Purchase Order**.
  - c. From the **Tasks** menu, select **Purchasing > Enter P.O.**
2. Verify the information in the **New Purchase Order – General** window. Click [**Next**].
3. Verify the information in the **New Purchase Order – Ship To** window. Click [**Next**].
4. Enter the purchase order items in the **New Purchase Order – Register** window. If you are entering a purchase order for Stock Purchases, then select **Stock loc** in the **Order for** field. Click [**Next**].
5. Select whether to preview or print the purchase order and whether you want to receive the items now. Click [**Finish**].

## Receive and Invoice Purchase Order Items

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Receive items wizard” and “Receipt of purchase order items.”

1. Select **View > Purchase Orders**. Double-click the open purchase order; then click [**Receive**].
2. Enter the date received and who received the items. Click [**Next**].
3. Verify the item’s description and the quantity on order. Enter the received quantity, or enter the S/N if necessary. Click [**Next**].
4. Select **I want to approve a vendor invoice for this P.O. now**. Click [**Finish**].
5. In the **Approve Vendor Invoice** window, enter the vendor invoice number, dates, totals, and discounts. Click [**Next**].
6. Verify the items. Enter the **Invoiced** amount or click [**Invoice All**]. Click [**Finish**].

## Edit Time Entries

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Edit time entries” and “Edit Time Entries fields.”

1. From the **Tasks** menu, select **Edit Time Entries**.
2. Enter a date range and select the type of entries to appear in the initial window.



**Note:** You can change this criteria at any time by selecting new criteria in the **From**, **To**, and **Show** fields located in the upper right corner of the **Edit Time Entries** window.

3. Edit and add time entries for the selected employees. Entries can be both work order and non-work order related.
4. Click [**Reconcile All**] to reconcile records.
5. Select the **Period End Date** for the time entries.
6. If applicable, select the check box **Override existing Period End Date on unreconciled entries**.
7. Click [**OK**].
8. Click [**Done**]. The message **Do you want to start Post Time Entries now** appears.
9. Click [**Yes**] to post now, or click [**No**] to post entries later using **Tasks > Post Time Entries**.

## Invoice a Work Order

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic, “Vendor invoice wizard.”

1. In the **All Locations** lookup view, double-click the location you want to invoice. You must enter work order items including labor, purchase order items, inventory items, and miscellaneous items before you create an invoice.



**Note:** You can enter additional descriptive text by adding a note to a work order line item and selecting the **Customer Viewable** option below the text box. You can enter only one note on each line item. All notes entered on work order line items are also visible as invoice line item notes, but only those designated as customer viewable appear on the printed invoices.

2. Double-click on the work order you want to invoice. Click [**Create Invoice**].
3. Verify the billing information in the **New Work Order - General** window. Click [**Next**].
4. Verify that the invoice line items carried over from the work order items in the invoice register. Verify that taxes have been calculated correctly, if applicable. Click [**Next**]. All work order items unbilled at the time of invoicing are included on the current invoice. You can create multiple invoices for a single work order by entering additional work order items after you have already created an invoice.

5. Select whether to preview or print the invoice and whether or not you want to close the work order to prevent additional edits. Click **[Finish]**.

## Process a Small Job Work Order

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Call types” and “Create work orders.”

1. Select the location from the location lookup view.
2. Click **[New work order]**. Verify or edit the information in the **New Work Order – Location** window. Click **[Next]**.
3. Select a call type that has a **Type** of “Small Job.”
4. Select the problem in the **Problem** field. Enter any comments necessary in the **Location comments** field. Click **[Next]**.
5. Enter the total price of the job in the **Total sale** field in the **New Work Order - Estimate** window. Note that the **Sale** product defaults to **Small Jobs**. Enter the estimated hours and the estimated cost breakdown; then click **[Next]**.



**Note:** You can edit this information at any time in the work order process.

6. Select the **Payment Method** and **Location of Sale**. Click **[Next]**.
7. If applicable, select **Standard Tasks** and **To Do items**. Click **[Next]**.
8. Activate the work order in the **New Work Order - Small Job Options** window. Once you have activated the work order, you can schedule it. Click **[Next]**.
9. Select whether to preview or print the purchase order. Click **[Finish]**.



**Note:** Small job work orders that you have not activated have a status of **Quote**. Unscheduled small job work orders have a status of **On-hold**.

## Bill a Small Job Work Order

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic “Bill small jobs.”

1. Double-click to open the small job work order. Click **[Create Invoice]**.
2. In the **Create Invoice** window, enter the percentage complete or the amount you want to invoice for the small job. The total sale and the amount and percent billed to date also appear in this window.
3. If the job is complete, click **[Final]** to invoice the remainder of the small job. The amount to invoice prefills and the percentage complete will change to 100 percent. Click **[OK]**.

4. Verify or edit the information in the **New Invoice – General** window. Click **[Next]**.
5. Verify the information in the **New Invoice – Register** window. Click **[Next]**.
6. Select **Close now** to close the work order and select whether to preview or print the invoice. Click **[Finish]**.

## Post Entries

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Interface settings” and “Post entries.”

1. From the **Tasks** menu select **Post Entries**.
2. Enter the desired cutoff date. You will post entries with an accounting date either on or before the cutoff date.
3. Select the transaction type. Selections include:
  - **ALL**
  - **Invoice**
  - **Agreement**
  - **Inventory**
  - **Work Order**
  - **Purchase Order**
  - **Amortization**
  - **Tenant Charge**
4. In the **Log file** field, either accept the default or enter a new file name.
5. Click **[OK]**.

## Select Daily Processing Tasks

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic, “Daily Processing.”

Tasks are divided into three categories:

Service	Agreements	Preventive Maintenance
Expire job quotes	Expire agreements and activate approved renewals	Generate P.M. work orders ready for scheduling
Roll E-Cards	Expire quotes and renewal offers	
	Generate renewal offers for expiring agreements.	
	Generate invoices for agreements ready to be billed	
	Amortize agreements	

1. From the **Tasks** menu, select **Daily Processing**.
2. Select the check box next to each task that you want to perform in this instance of daily processing. Check boxes will be automatically selected only if the task has not already been run for that day.
3. Click **[OK]** and then click **[Yes]** to review the log.

## Enter Service Agreements

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Create a new agreement” and “Agreement types.”

1. From the location’s lookup view, double-click the location and select the **Agreements** tab. Click **[New Agreement]**.
2. Verify and edit the information in the **New Agreement – Location** window’s **Location**, **Bill to**, and **Contact** fields. Select the center and enter an alternate agreement number, if applicable. Click **[Next]**.
3. Verify and edit the information in the **New Agreement – General** window’s **Technician**, **Sales lead**, **Lead source**, and **Salesman** fields. Enter any special instructions as needed. Click **[Next]**.
4. Enter the start date. This determines expirations and renewals as defined in **SM Settings**.
5. Enter the term of the agreement.
6. In the **New Agreement – Period** window, select the appropriate option in the **Rate sheet** field. The default is based on the default agreement type set up on the **Agreements** tab in **SM Settings**.
7. Select the billing option, **Number of billings**, **Amount per billing**, and whether the invoice date will be based on the **Day of generation** or the **Day of the month**. Click **[Next]**.



**Note:** **Amount per billing** is not available if the pricing method on the agreement type is set to equipment pricing.

8. In the equipment register, select the customer’s equipment that will be covered with this agreement, if applicable. Then enter a billing amount for this agreement.



**Note:** This amount is not available if the pricing method on the agreement type is set to **Agreement Price**.

9. **Payment Method** information and the **Customer P.O.** field are for reference only. Select the **Tax exempt** check box, if applicable. Select the **Location of the Sale**.
10. Click **[Next]**.



11. Specify whether to print or preview the agreement. If you select **I want to approve and activate this agreement now** then you will also have the option to select **I want to bill this agreement now**. Click **[Finish]**.
12. If this agreement uses equipment pricing and the equipment is related to a preventive maintenance task, go to the location's **Equipment** tab and right-click the equipment to select **Properties**. Then select **PM Tasks > [Edit] > General** and enter the agreement to link the agreement to the PM work order processing.

## Transfer Parts from One Location to Another

Use this task to transfer one or more parts from one stocking location to another.

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic "Tasks Menu > Inventory."

1. Select **Tasks > Inventory > Transfer Parts**.
2. Enter text that describes the transfer in the **Description** field. This description will appear in the transaction log.
3. Enter the date of the transfer and select the stocking location source and destination of the transfer.
4. Determine whether this transfer will include the transfer of the complete contents of one stocking location to another location and whether the restocking list for the destination source should be used as the basis of the transfer.



**Note:** If the source location is not **\*Main Stock** and you have selected the **Transfer will apply to outstanding restocking list** check box, any parts specified on this transfer will be applied against any open restocking list for the destination location.

5. Click **[Next]**.
6. Enter the parts and quantities you want to transfer.
7. Click **[Finish]**.

## Generate Restocking Lists

You can print a restocking report for any restocking lists that are currently open in the system.

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topic "Tasks Menu > Inventory."

1. Select **Tasks > Inventory > Generate Restocking Lists** to create restocking lists generated from standard stock lists associated with stocking locations other than main stock.
2. In the **Generate Restocking Lists** window, select a stock code from the **Standard Stock Code** list.

3. Select the **Preview generated restocking list(s)** check box.
4. Select **Stocking Locations**. Stocking locations that are associated with the selected stock code are automatically configured based on selections you make within the stock locations list.
5. Click **[OK]**. The stocking list appears.

## Fill Restocking Lists

Use this option to actually affect the transfer of parts from one stocking location to another. The application assumes restocking is being done from main stock.

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to the Help topics “Tasks Menu > Inventory.”

1. Select **Tasks > Inventory > Fill Restocking List**.
2. In the **Fill Restocking List – General** window, select a destination from the **Destination** field’s drop down list. The system will use the standard stock list assigned to the stocking location setup to identify quantities needed. Click **[Next]**.
3. Review the register and use **[Add]** and **[Delete]** to edit items.
4. Click **[Finish]**.