



Field Services: Equipment and Route Management

Valentina Shashkova

May, 13 - May, 14

Introduction

Agenda

Two day training:

- Day 1: Monday; May, 13, 2019
9:00 – 11:00 AM PDT
- Day 2: Tuesday; May, 14, 2019
9:00 – 11:00 AM PDT

Agenda

Day 1:

- Creating Target Equipment Manually (Lesson 1)
- Servicing of Target Equipment (Lesson 2)
- Creating Model Equipment with Components (Lesson 3)
- Selling and Replacing Equipment and Components (Lessons 4-9)

Agenda

Day 2:

- Processing Service Contracts with Different Types of Billing (Lessons 10-11)
- Creating a Route Execution on the Fly (Lesson 12)
- Executing a Route (Lesson 13)
- Processing Route Service Contracts (Lesson 14)
- Executing a Route by Using the Mobile App (Lesson 15)

Technical Environment

- Acumatica ERP instance on your laptop or computer:
 - Build 19.101.0084
 - Demo data U100
 - Service Management, Equipment Management, and Route Management (10 Vehicles) features enabled on the Enable/Disable Features (CS100000) form
- Acumatica ERP mobile app on your cellphone, or tablet, or a mobile emulator

Session Rules

- Dynamics of the training:
 - Lesson steps will be shown and explained
 - Questions can be asked in the chat
 - Recording and snapshots will be available the next day
- Questions after the training:
 - Email: vshashkova@acumatica.com
 - Skype: valent2903
- Enjoy the training!



Training Steps: Equipment Management

Company Story

SweetLife Fruits & Jams

- SweetLife Office and Wholesale Center
- SweetLife Store
- Service and Equipment Sales Center



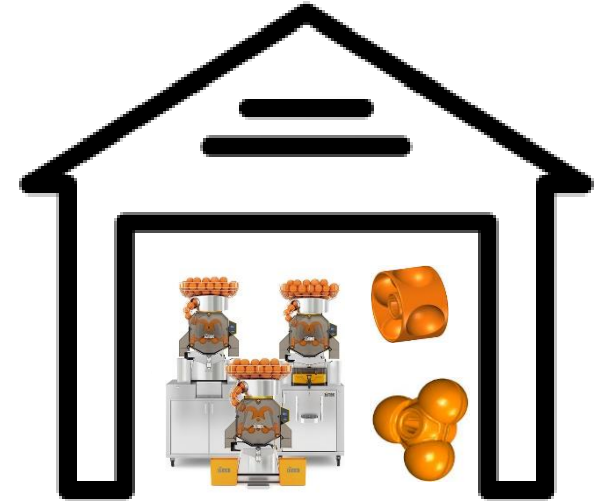
Overview

- Equipment Management module
- Equipment Type
 - Model Equipment
 - Target Equipment
 - Resource Equipment



Overview

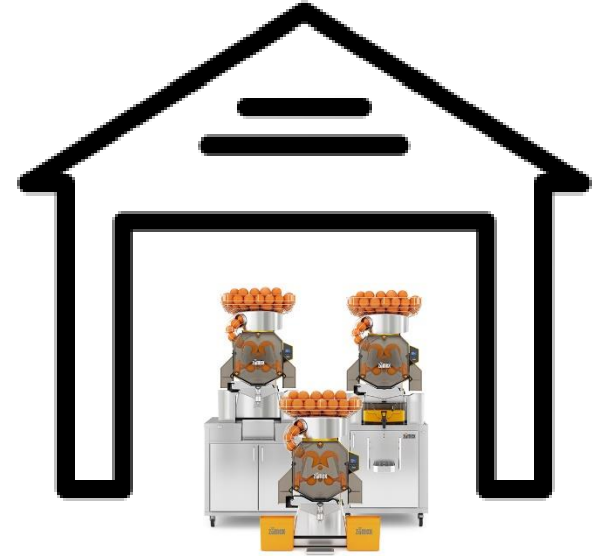
- Model Equipment:
 - With components
 - Without components



Warehouse –
Stock Item (Model
Equipment)
Stock Item (Component)

Overview

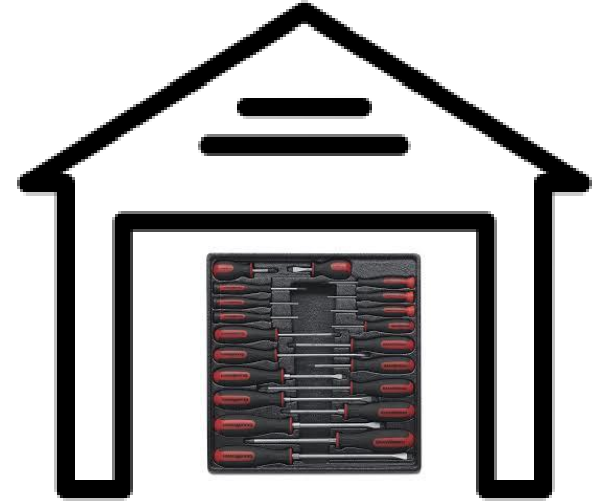
- Target Equipment:
 - Customer's
 - Your own



Customer or Your Own
Location –
Equipment (Target
Equipment)

Overview

- Resource Equipment:
 - Your location
 - Customer's location

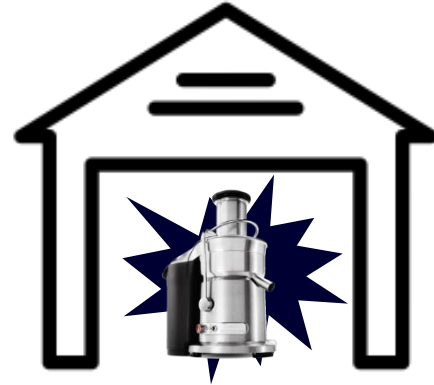


Customer or Your Own
Location –
Equipment (Resource
Equipment)

Lesson 1: Creating Target Equipment Manually

Objective

To create a target equipment entity without components manually



Customer Location –
Equipment (Target
Equipment)

Lesson 1: Creating Target Equipment Manually

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Item Classes (IN201000) form: *JUICERMED (Model Equipment item class)*
- Stock Items (IN202500) form: *JUICER10 (Model Equipment)*

Lesson 1: Creating Target Equipment Manually

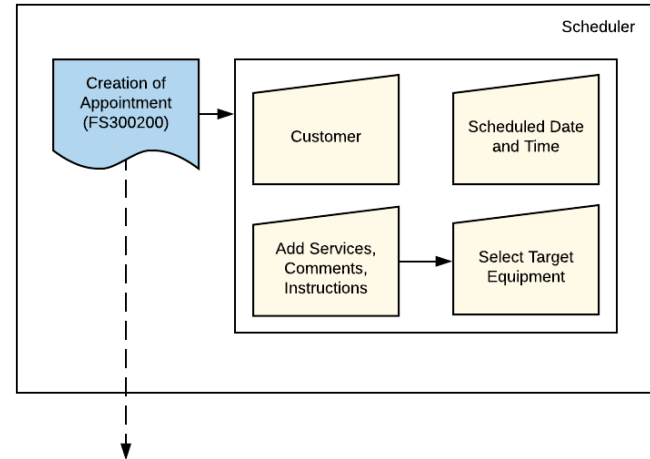
Process Overview

1. Create a target equipment entity on the Equipment (FS205000) form
2. Review the list of customer's equipment on the Equipment Summary (FS400200) form

Lesson 2: Servicing of Target Equipment

Objective

To create an appointment for servicing of a target equipment entity



Lesson 2: Servicing of Target Equipment

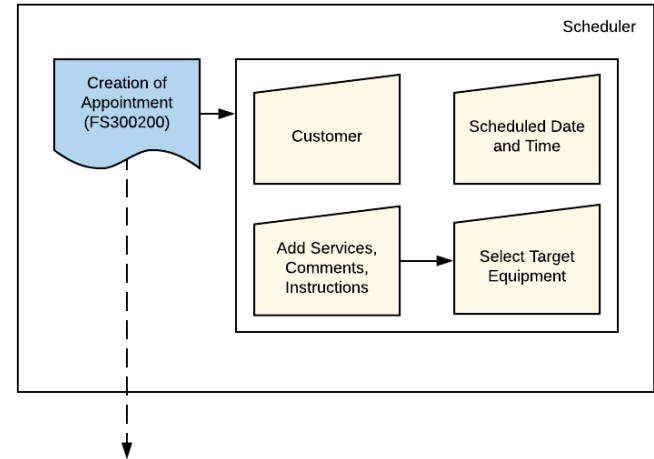
Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Non-Stock Items (IN202000) form: *REPAIR (Service)*
- Item Classes (IN201000) form: *JUICER (Model Equipment Item Class)*
- Stock Items (IN202500) form: *JUICER20C (Model Equipment)*
- Equipment (FS205000) form: *FSE00005 (Target Equipment)* for the *TOMYUM* customer

Lesson 2: Servicing of Target Equipment

Process Overview

1. Create an appointment for servicing of the target equipment on the Appointments (FS300200) form
2. Review the history of appointments for the target equipment on the Appointment Details (FS400500) form



Lesson 3: Creating Model Equipment with Components

Objective

To create a model equipment entity with components



Lesson 3: Creating Model Equipment with Components

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Item Classes (IN201000) form:
 - *BLADE, COVER, CONTAINER (Component Item Classes)*
 - *JUICERLOW (Model Equipment Item Class)*

Lesson 3: Creating Model Equipment with Components

Process Overview

1. Create components on the Stock Items (IN202500) form
2. Create a model equipment entity on the Stock Items (IN202500) form

Lesson 3: Creating Model Equipment with Components

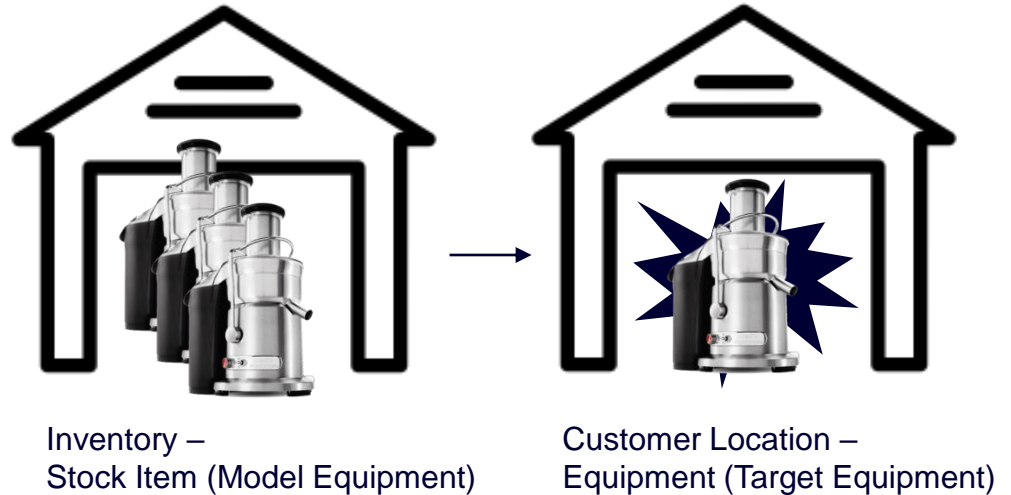
Company Warranty vs Vendor Warranty



Lesson 4: Selling a Piece of Model Equipment

Objective

To register a sell of a model equipment entity



Lesson 4: Selling a Piece of Model Equipment

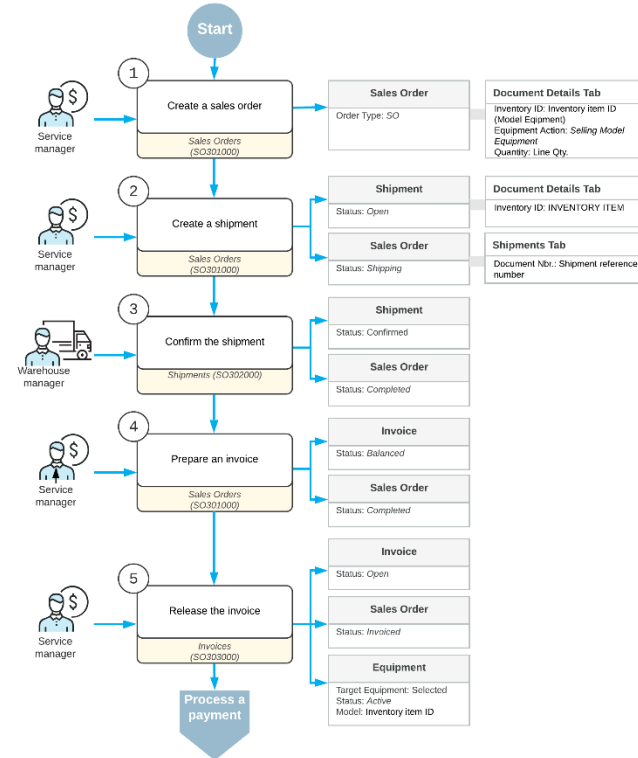
Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Order Types (SO201000) form: The Enable Field Services Integration check box is selected for the SO order type
- Item Classes (IN201000) form: *JUICER* (Model Equipment Item Class)
- Stock Items (IN202500) form: *JUICER20C* (Model Equipment)

Lesson 4: Selling a Piece of Model Equipment

Process Overview

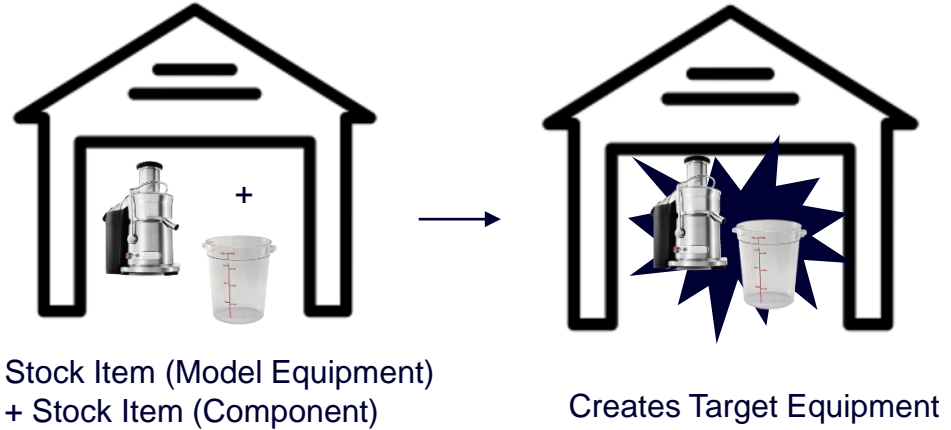
1. Create a sales order on the Sales Orders (SO301000) form
2. Process the sales order:
 1. Create a shipment from the Sales Orders (SO301000) form
 2. Confirm the shipment on the Shipments (SO302000) form
 3. Prepare and release an invoice on the Invoices (SO303000) form
3. Review the details of the target equipment on the Equipment (FS205000) form



Lesson 5: Selling Optional Components for Model Equipment

Objective

To sell a piece of model equipment and an optional component for it



Lesson 5: Selling Optional Components for Model Equipment

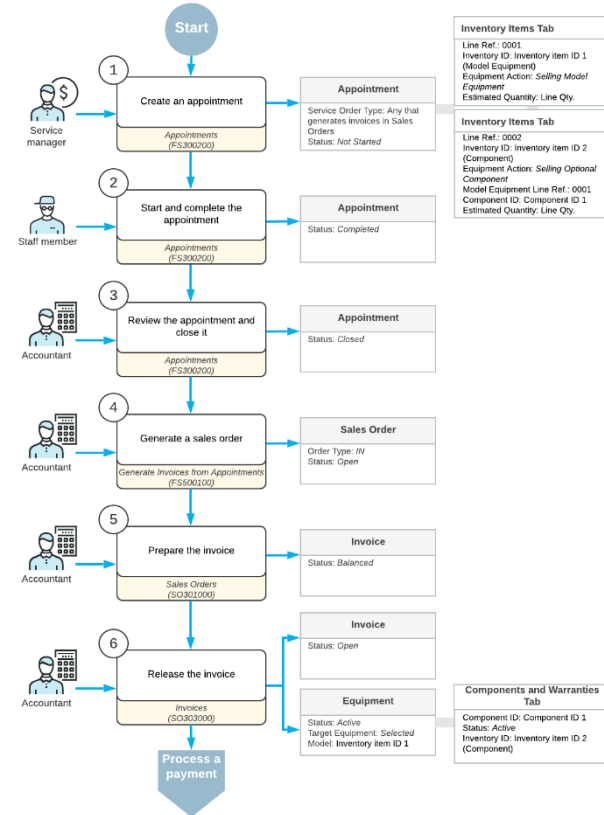
Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Order Types (SO201000) form:
 - The Enable Field Services Integration check box is selected for the *SO* order type
 - The Enable Field Services Integration check box is selected for the *IN* order type
- Non-Stock Item (IN202000) form: *INSTALL (Service)*
- Item Classes (IN201000) form: *JUICER (Model Equipment Item Class)*
- Stock Items (IN202500) form:
 - *JUICER20C (Model Equipment)*
 - *CONTAINER (Component)*

Lesson 5: Selling Optional Components for Model Equipment

Process Overview

1. Create an appointment on the Appointments (FS300200) form
2. Process the appointment on the Appointments (FS300200) form
3. Review the generated target equipment on the Equipment (FS205000) form



Lesson 6: Selling an Optional Component for Target Equipment

Objective

To sell an optional component for a piece of target equipment



Stock Item (Component)



Updates Target Equipment:
Adds New Component

Lesson 6: Selling an Optional Component for Target Equipment

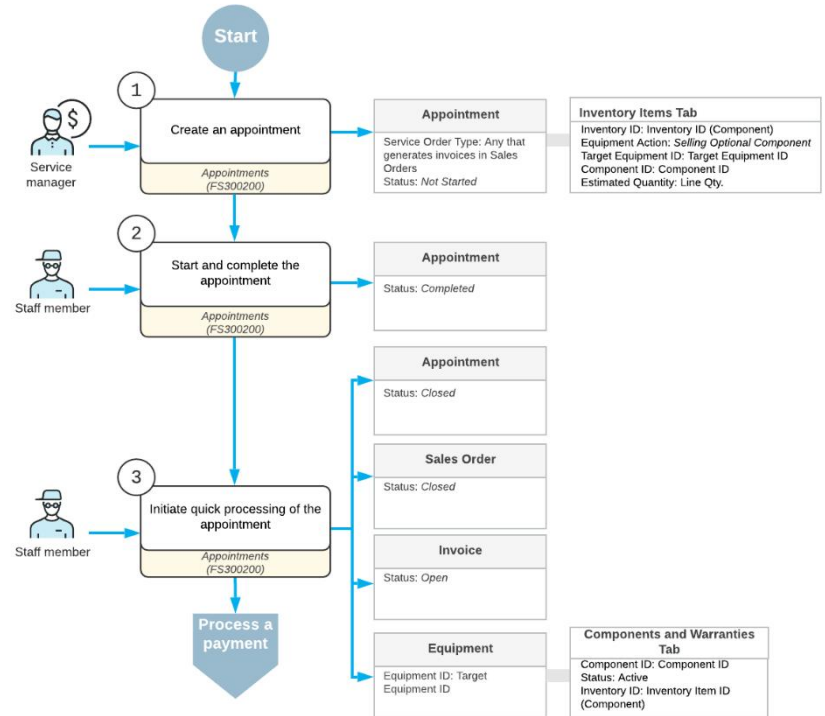
Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Order Types (SO201000) form:
 - The Enable Field Services Integration check box is selected for the *SO* order type
 - The Enable Field Services Integration check box is selected for the *IN* order type
- Non-Stock Items (IN202000) form: *INSTALL (Service)*
- Item Classes (IN201000) form: *JUICER (Model Equipment Item Class)*
- Stock Items (IN202500) form:
 - *JUICER20C (Model Equipment)*
 - *CONTAINER (Component)*
- Equipment (FS205000) form: *FSE00006 (Target Equipment)* for the *HMBAKERY* customer

Lesson 6: Selling an Optional Component for Target Equipment

Process Overview

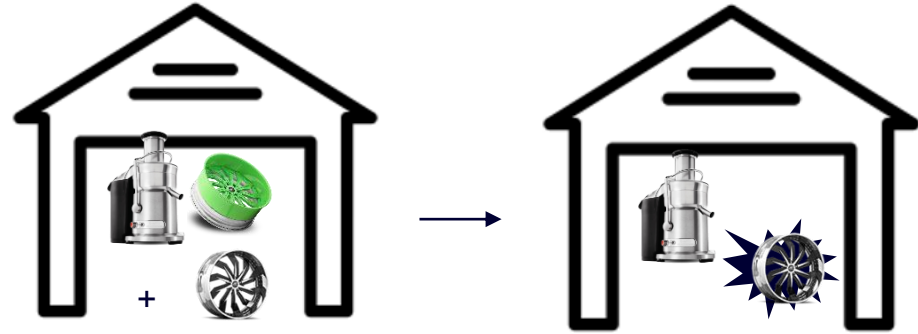
1. Create an appointment on the Appointments (FS300200) form
2. Process the appointment on the Appointments (FS300200) form
3. Review the generated target equipment on the Equipment (FS205000) form



Lesson 7: Selling an Upgraded Component for Model Equipment

Objective

To sell a piece of model equipment and an upgraded component for it



Stock Item (Model Equipment)
+ Stock Item (Component)

Creates Target Equipment

Lesson 7: Selling an Upgraded Component for Model Equipment

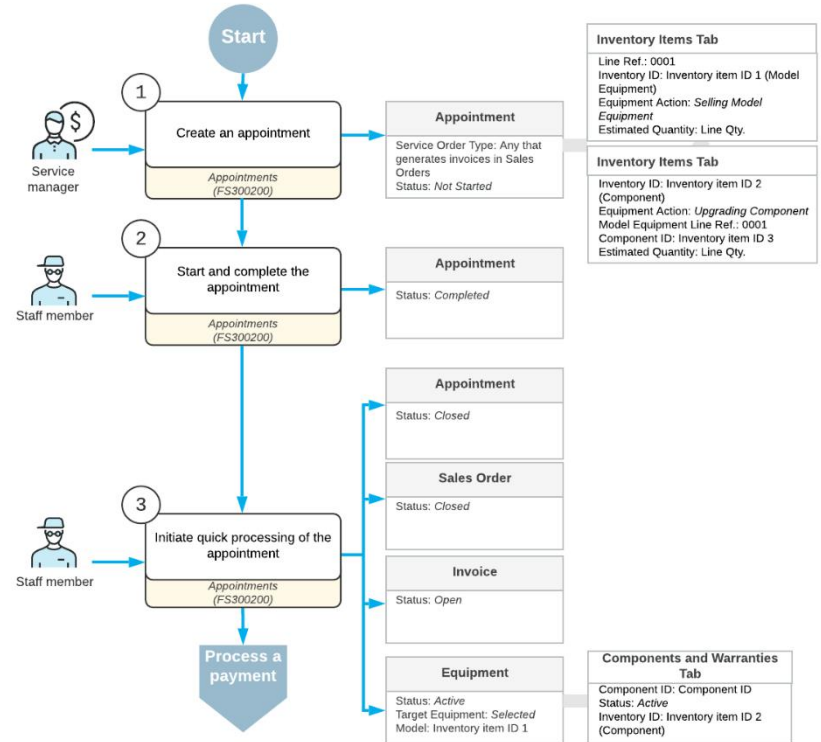
Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Order Types (SO201000) form:
 - The *SO* order type is enabled for use in the Field Services functional area
 - The *IN* order type is enabled for use in the Field Services functional area
- Non-Stock Items (IN202000) form: *INSTALL (Service)*
- Item Classes (IN201000) form: *JUICER (Model Equipment Item Class)*
- Stock Items (IN202500) form:
 - *JUICER20C (Model Equipment)*
 - *WHEEL243 (Component)*
 - *WHEEL313 (Component)*

Lesson 7: Selling an Upgraded Component for Model Equipment

Process Overview

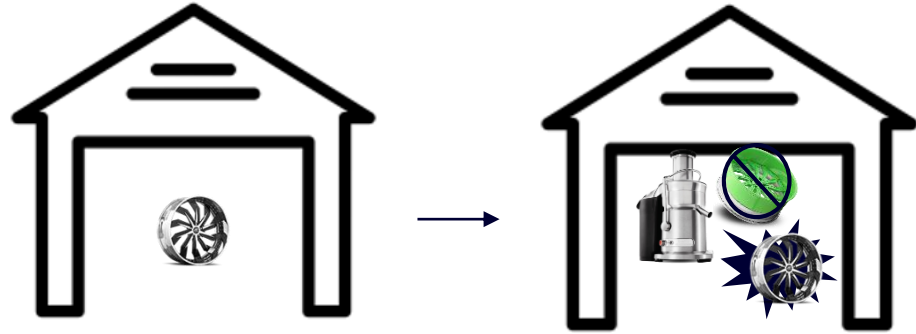
1. Create an appointment on the Appointments (FS300200) form
2. Process the appointment on the Appointments (FS300200) form
3. Review the generated target equipment on the Equipment (FS205000) form



Lesson 8: Replacing a Component of Target Equipment

Objective

To replace a component of a piece of target equipment



Stock Item (Component)

Updates Target Equipment:
Discards Old Component +
Adds New Component

Lesson 8: Replacing a Component of Target Equipment

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Order Types (SO201000) form:
 - The *SO* order type is enabled for use in the Field Services functional area
 - The *IN* order type is enabled for use in the Field Services functional area
- Non-Stock Items (IN202000) form: *REPAIR (Service)*
- Item Classes (IN201000) form: *JUICER (Model Equipment Item Class)*
- Stock Items (IN202500) form:
 - *JUICER20C (Model Equipment)*
 - *BLADE12 (Component)*

Lesson 8: Replacing a Component of Target Equipment

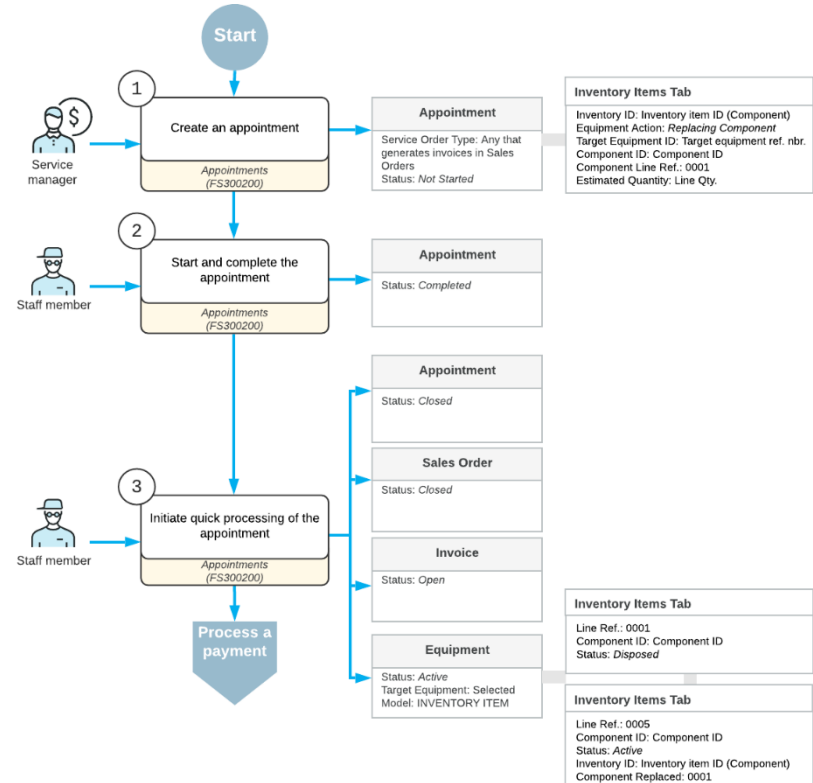
Configuration Overview

- Equipment (FSE00005) form: *FSE00007 (Target Equipment)* for the *GOODFOOD* customer

Lesson 8: Replacing a Component of Target Equipment

Process Overview

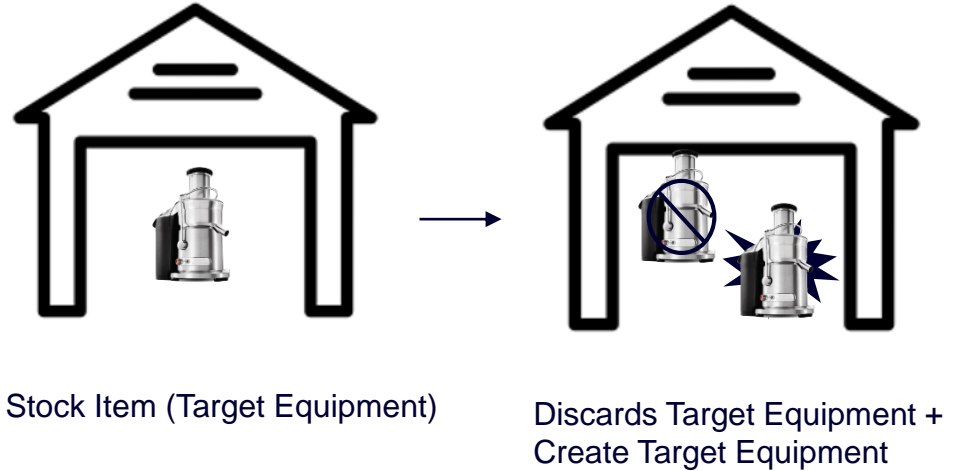
1. Create an appointment on the Appointments (FS300200) form
2. Process the appointment on the Appointments (FS300200) form
3. Review the generated target equipment on the Equipment (FS205000) form



Lesson 9: Replacing a Piece of Target Equipment with a New One

Objective

To replace a piece of target equipment



Lesson 9: Replacing a Piece of Target Equipment with a New One

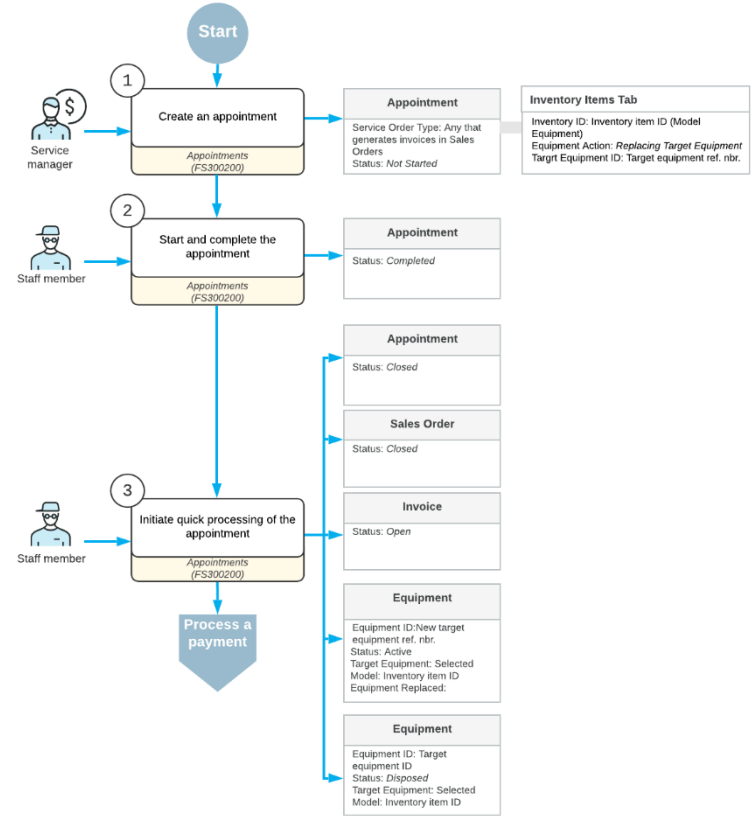
Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Order Types (SO201000) form:
 - The *SO* order type is enabled for use in the Field Services functional area
 - The *IN* order type is enabled for use in the Field Services functional area
- Non-Stock Item (IN202000) form: *INSTALL (Service)*
- Item Class (IN201000) form: *JUICER (Model Equipment Item Class)*
- Stock Item (IN202500) form: *JUICER20C (Model Equipment)*
- Equipment (FSE00005) form: *FSE00008 (Target Equipment)* for the *GOODFOOD* customer

Lesson 9: Replacing a Piece of Target Equipment with a New One

Process Overview

1. Create an appointment on the Appointments (FS300200) form
2. Process the appointment on the Appointments (FS300200) form
3. Review the generated target equipment on the Equipment (FS205000) form



Session Rules

- Dynamics of the training:
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 - Recordings will be available the next day
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 - Skype: valent2903
- Enjoy the training!



Summary Day 1

We have learned:

- How to create target equipment manually in the system
- How to create model equipment in the system
- How to register a sale of model equipment or a component
- How to register a replacement of target equipment or a component

Question

What is the type of the equipment for which you can perform services?

1. Model Equipment
2. Target Equipment
3. Resource Equipment

Agenda

Day 2:

- Processing Service Contracts with Different Types of Billing (Lessons 10-11)
- Creating a Route Execution on the Fly (Lesson 12)
- Executing a Route (Lesson 13)
- Processing Route Service Contracts (Lesson 14)
- Executing a Route by Using the Mobile App (Lesson 15)

Service Contracts

Two billing types:

- As-Preformed

Billed after each appointment

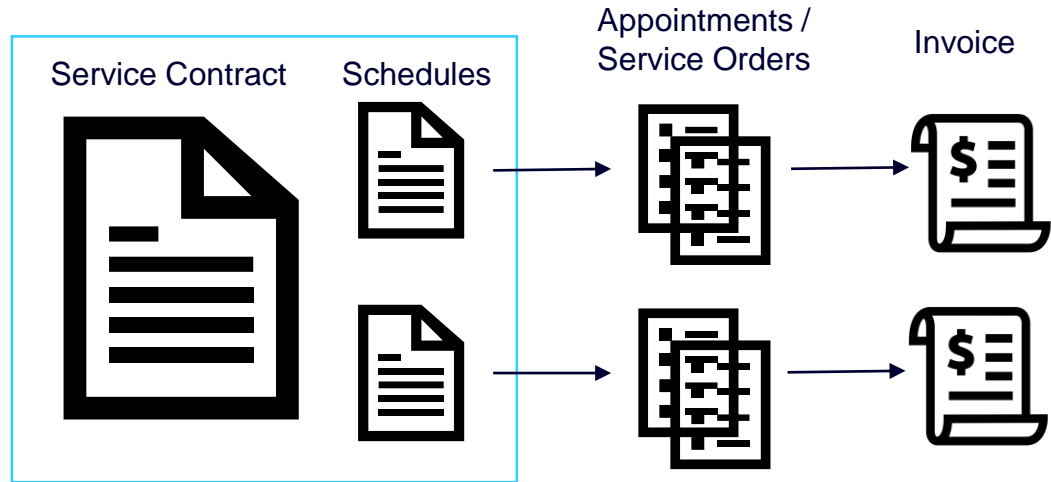
- Standardized

Billed at the end of billing period

Service Contracts with As-Performed Billing

Documents:

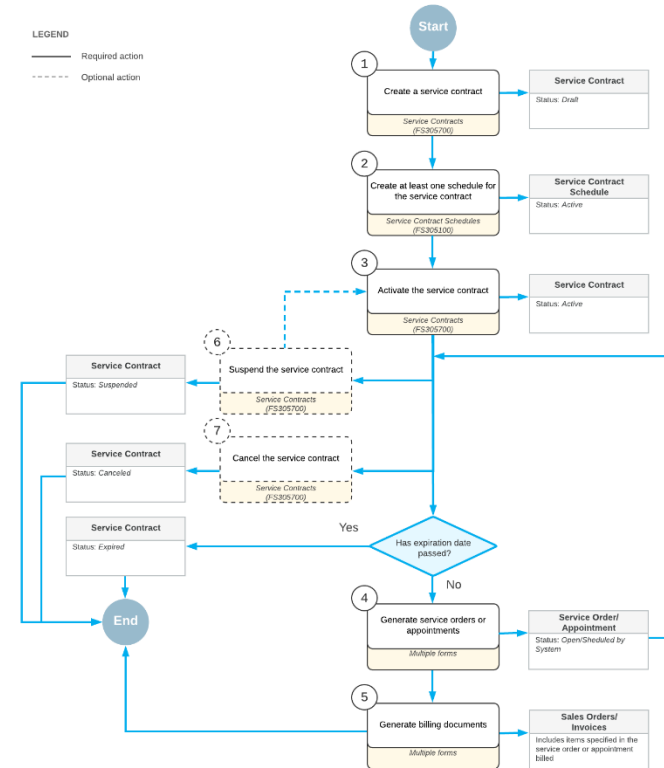
- Service contract with as-performed billing
- Schedules



Service Contracts with As-Performed Billing

Processing Workflow

1. Entering a service contract
2. Creating at least one schedule
3. Activating the service contract
4. Generating and processing the service orders or appointments
5. Generating and processing billing documents
6. Suspending the contract (optional)
7. Canceling the contact (optional)



Lesson 10: Processing Service Contracts with as-Performed Billing

Objective

To create a service contract with as-performed billing and generate and process appointments for it

Lesson 10: Processing Service Contracts with as-Performed Billing

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Non-Stock Items (IN202000) form: *CLEANING (Service)*
- Equipment (FS205000) form: *FSE00007 (Target Equipment)* for the *GOODFOOD* customer

Lesson 10: Processing Service Contracts with as-Performed Billing

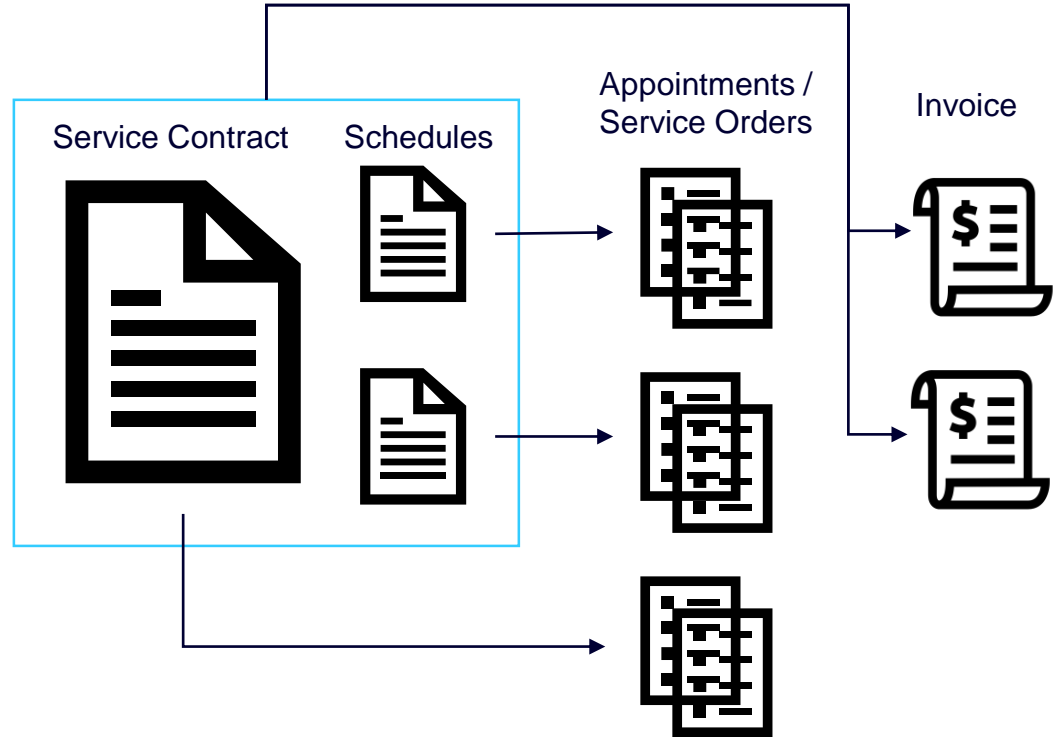
Process Overview

1. Create a service contract on the Service Contracts (FS305700) form
2. Create a schedule for the service contract on the Service Contract Schedules (FS305100) form
3. Generate appointments from the contract on the Generate from Service Contracts (FS500300) form
4. Review the generated appointments on the Appointment Summary (FS400100) form
5. Process an appointment on the Appointments (FS300200) form

Service Contracts with Standardized Billing

Documents:

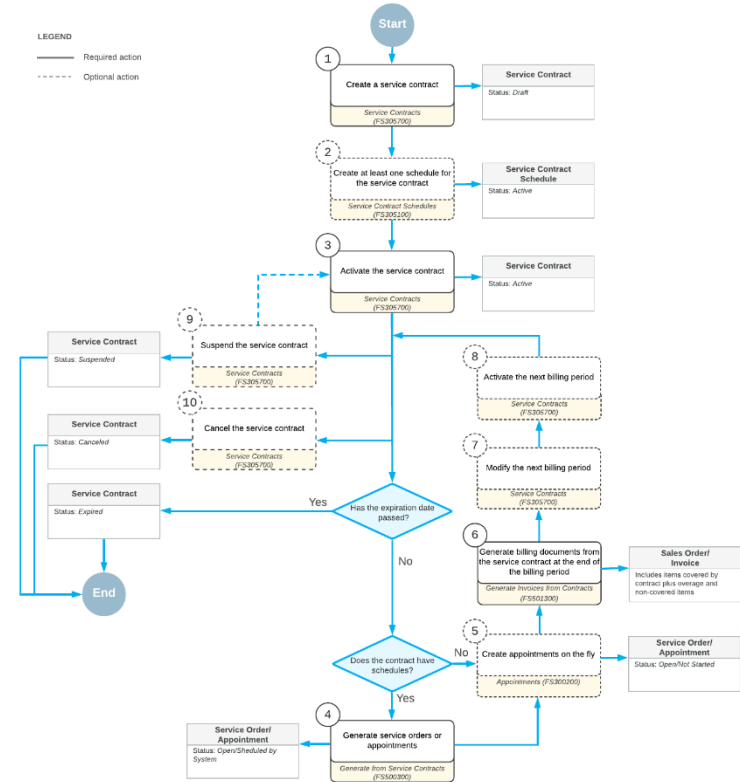
- Service contract with standardized billing
 - Billing Period
 - Services Per Period
 - Coverage quantity & price
 - Overage price
- Schedules (Optional)



Service Contracts with Standardized Billing

Processing Workflow

1. Entering a service contract
2. Creating at least one schedule (optional)
3. Activating the service contract
4. Generating the service orders or appointments
5. Creating the service orders or appointments on the fly
6. Generating and processing billing documents
7. Modify the next billing period (optional)
8. Activate the next billing period (optional)
9. Suspending the contract (optional)
10. Canceling the contact (optional)



Lesson 11.1: Creating a Service Contract with Standardized Billing

Objective

To create a service contract with standardized billing and generate appointments for it

Lesson 11.1: Creating a Service Contract with Standardized Billing

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Non-Stock Items (IN202000) form: *CLEANING (Service)*
- Equipment (FS205000) form: *FSE00006 (Target Equipment)* for the *HIMBAKERY* customer

Lesson 11.1: Creating a Service Contract with Standardized Billing

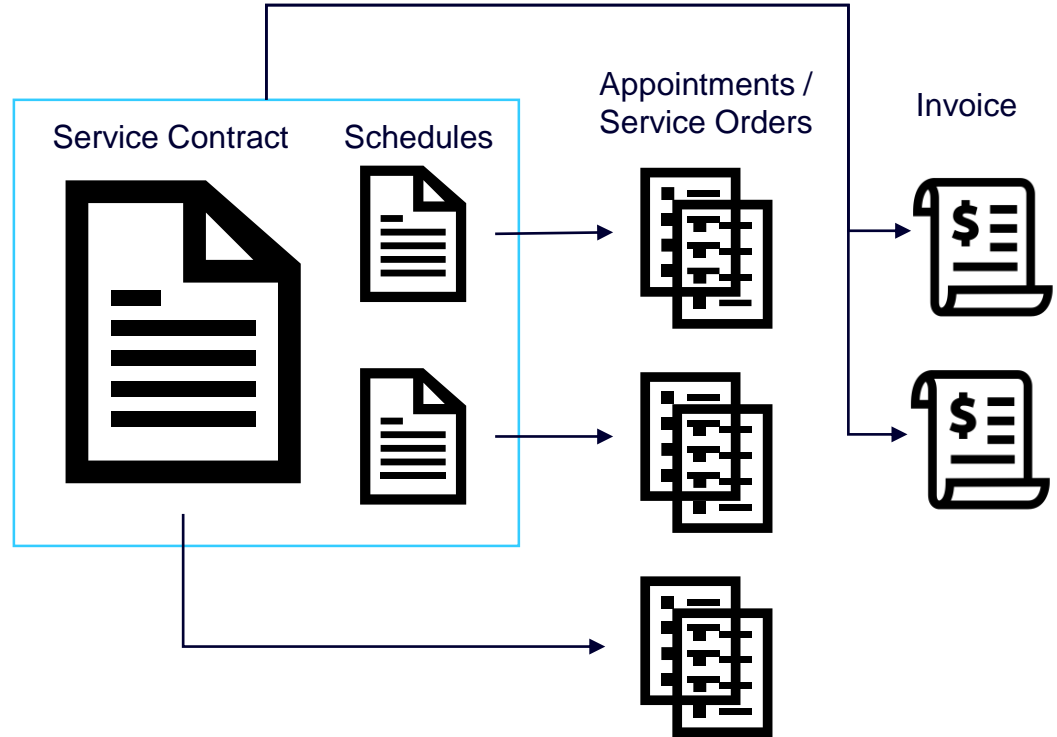
Process Overview

1. Create a service contract on the Service Contracts (FS305700) form
2. Create a schedule for a service contract on the Service Contract Schedules (FS305100) form
3. Generate appointments from a contract on the Generate from Service Contracts (FS500300) form
4. Review the generated appointments on the Appointment Summary (FS400100) form

Lesson 11.2: Processing a Billing Period with Overage Usage

Objective

To create an appointment on the fly with overage items and process appointments for the first billing period



Lesson 11.2: Processing a Billing Period with Overage Usage

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Non-Stock Items (IN202000) form: *CLEANING (Service)*
- Equipment (FS205000) form: *FSE00006 (Target Equipment)* for the *HIMBAKERY* customer
- Service Contracts (FS305700) form: Service Contract (created in the previous part of the lesson)
- Appointments (FS300200) form: Appointment (generated for a schedule of the service contract in the previous part of the lesson)

Lesson 11.2: Processing a Billing Period with Overage Usage

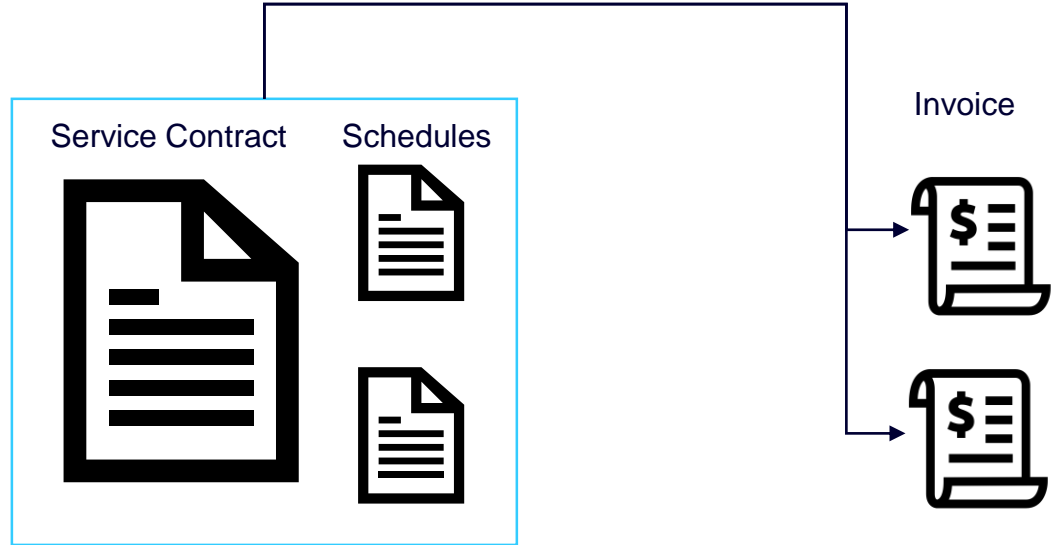
Process Overview

1. Create an appointment on the fly on the Appointments (FS300200) form
2. Process an appointment generated from a contract schedule on the Appointments (FS300200) form
3. Process the appointment created on the fly on the Appointments (FS300200) form
4. Generate an invoice for the first billing period on the Generate Invoices from Contracts (FS501300) form

Lesson 11.3: Generating Billing Documents for a Period Without Appointments

Objective

To create invoices for a billing period without appointments



Lesson 11.3: Generating Billing Documents for a Period Without Appointments

Configuration Overview

- Enable/Disable Features (CS100000) form
- Equipment Management Preferences (FS100300) form
- Non-Stock Items (IN202000) form: *CLEANING (Service)*
- Equipment (FS205000) form: *FSE00006 (Target Equipment)* for the *HIMBAKERY* customer
- Service Contracts (FS305700) form: Service Contract (created in the previous part of the lesson)

Lesson 11.3: Generating Billing Documents for a Period Without Appointments

Process Overview

1. Review whether appointments has been attended during a billing period on the Appointment Summary (FS400100) form
2. Generate an invoice for the billing period on the Generate Invoices from Contracts (FS501300) form

Question

For service contracts of which billing type schedules are necessary to be created?

1. As-performed billing type
2. Standardized billing type
3. Both types

Training Steps: Route Management

Overview

- Route Management module
- Documents:
 - Routes (templates)
 - Route Document Details (route executions)



Lesson 12: Creating a Route Execution on the Fly

Objective

To create a route execution for a particular day

Staff Routes on Map ☆

Staff: SWEETQ < 02/04/2019 >

Route List

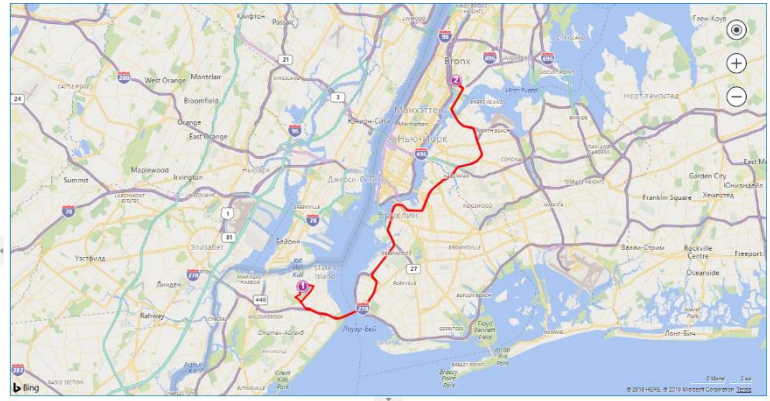
Route/Customer	Locat...	Se
Peter Lai NY		0h
STA...		0h
000...	Thal Food Re... MAIN	0h
END...		0h

Route for Peter Lai

Route Time: 1h 50m
Route Distance: 53 miles
Number of Appointments: 1

Appointments for Peter Lai (3)

Appointment...	Route/Customer	Service Type	Trave...	Service Du...	Location	Postal C...	Address
START LO...			0h 0m	0		10301	218 Oakwood Ave, NY, New York 10301, US
000030-1	Thal Food Restaurant	Route Ser...	0h 42m	0h 36m	MAIN	10454	341 E 138th St, NY, New York 10454, US



Lesson 12: Creating a Route Execution on the Fly

Configuration Overview

- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100300) form: Bing Map API Key
- Route Management Preferences (FS100300) form
- Service Order Types (FS202300) form: *RTE* (behavior: *Route*)
- Non-Stock Items (IN202000) form: *DELIVERY* (*Route Service*)
- Skills (FS200600) form: *DRIVING* (Driver Skill selected)
- Employees (FS203000) form: *Peter Lai* (*Driver*)
- Vehicles (FS203600) form: *FSE00004*
- Routes (FS203700) form: *NY* (Monday, Wednesday, and Friday 9:00 AM)

Lesson 12: Creating a Route Execution on the Fly

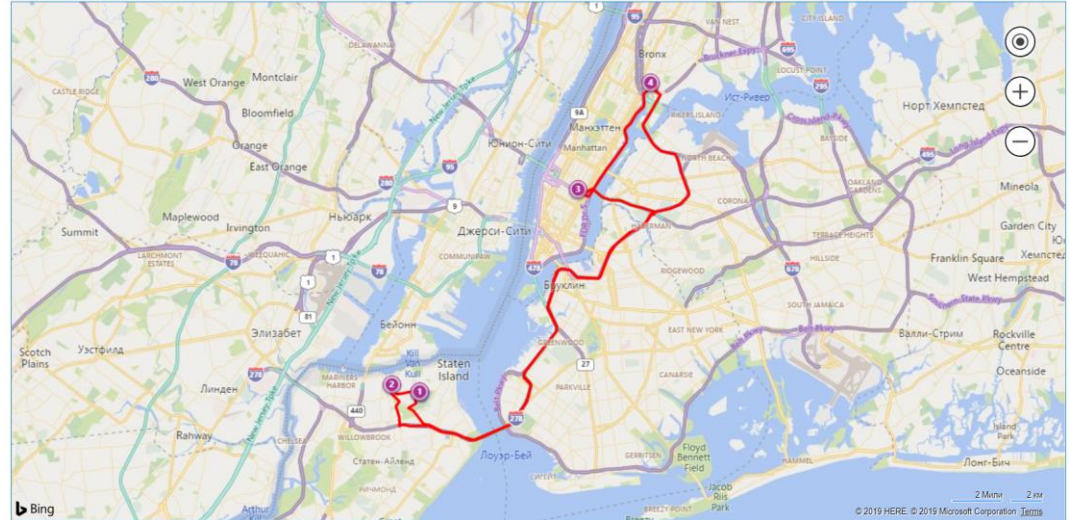
Process Overview

1. Create a route execution on the fly on the Route Document Details (FS304000) form
2. Add an appointment to the route execution on the Appointments (FS300200) form
3. Review appointments of the driver on the Staff Calendar Board (FS300400) form
4. Review the route execution on the map on the Staff Routes on Map (FS30100) form

Lesson 13: Executing a Route

Objective

To process a route execution from starting through closing



Lesson 13: Executing a Route

Configuration Overview

- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100300) form: Bing Map API Key
- Route Management Preferences (FS100300) form
- Service Order Types (FS202300) form: *RTE* (behavior: *Route*)
- Skills (FS200600) form: *DRIVING* (*Driver Skill* selected)
- Non-Stock Items (IN202000) form: *DELIVERY* (*Route Service*)
- Employees (FS203000) form: Peter Lai (Driver)
- Vehicles (FS203600) form: *FSE00004*
- Routes (FS203700) form: *NY2* (Tuesday and Thursday 9:00 AM)

Lesson 13: Executing a Route

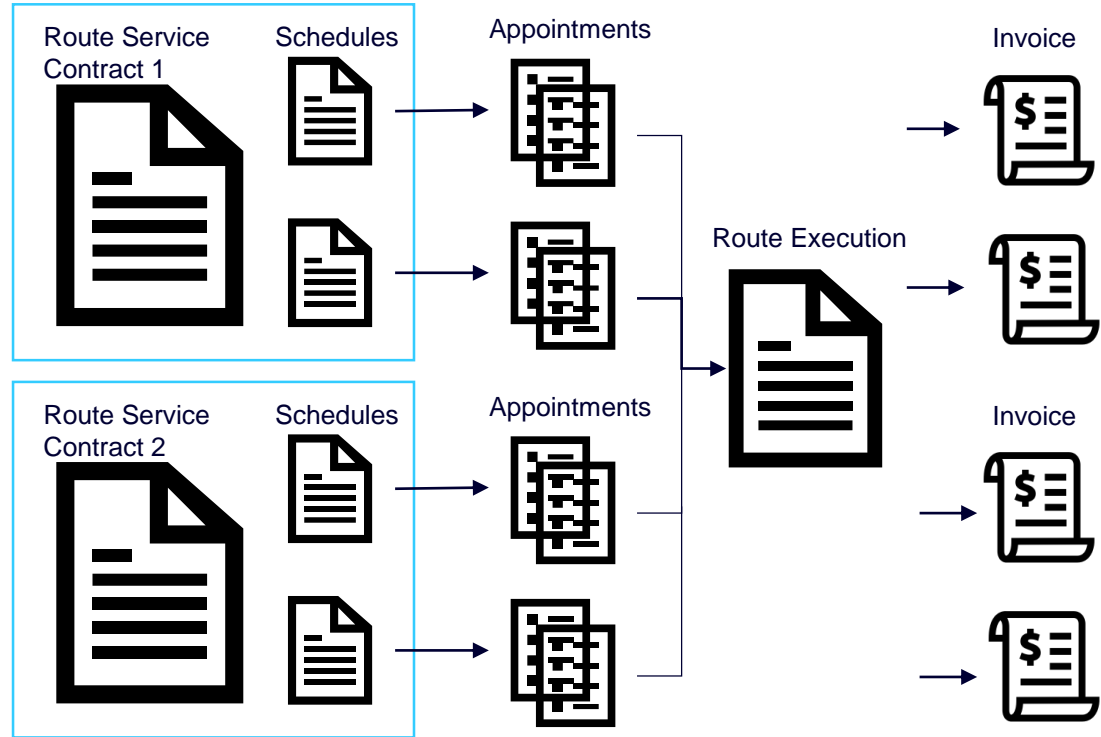
Process Overview

1. Start a route execution on the Route Document Details (FS30400) form
2. Complete appointments on the Appointments (FS300200) form and route execution on the Route Document Details (FS30400) form
3. Close the route execution on the Close Routes (FS500800) form

Lesson 14: Processing Route Service Contracts

Objective

To create route service contracts with as-performed billing and their schedules



Lesson 14: Processing Route Service Contracts

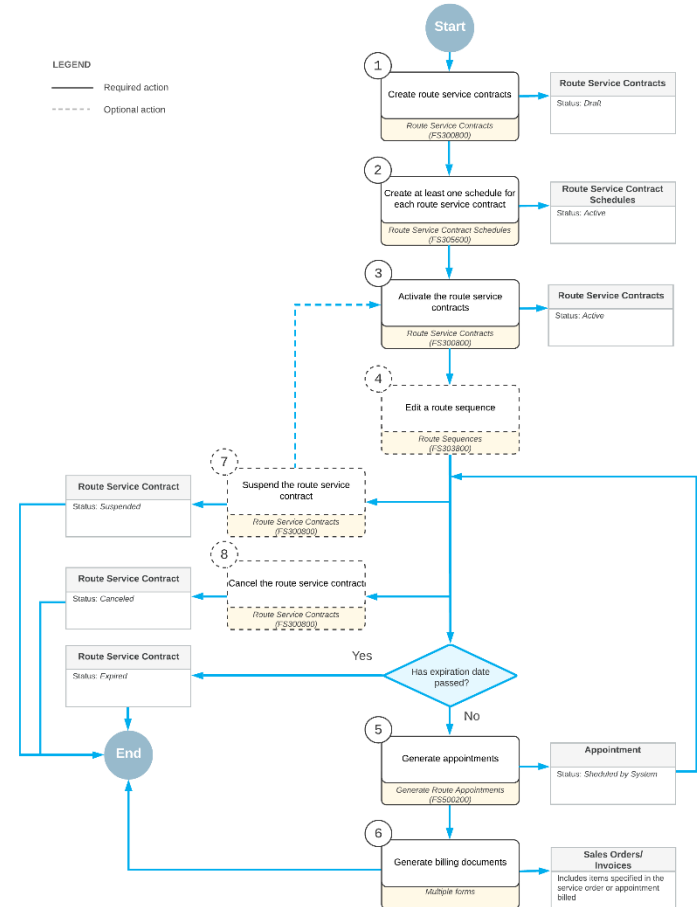
Configuration Overview

- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100300) form: Bing Map API Key
- Route Management Preferences (FS100300) form
- Service Order Type (FS202300) form: *RTE* (behavior: *Route*)
- Non-Stock Items (IN202000) form: *DELIVERY* (*Route Service*)
- Employees (FS203000) form: Peter Lai (Driver)
- Vehicles (FS203600) form: *FSE00004*
- Routes (FS203700) form: *NY2* (Tuesday and Thursday 9:00 AM)

Lesson 14: Processing Route Service Contracts

Process Overview

1. Create route service contracts with as-performed billing on the Route Service Contracts (FS300800) form
2. Create route service schedules on the Route Service Contract Schedules (FS305600) form
3. Specify the route order on the Route Sequences (FS303800) form
4. Generate route appointments on the Generate Route Appointments (FS500200) form
5. Review generated route executions on the Routes on Map (FS300900) form



Lesson 15: Executing a Route by Using the Mobile App

Objective

To process a route execution by using the mobile app

Lesson 15: Executing a Route by Using the Mobile App

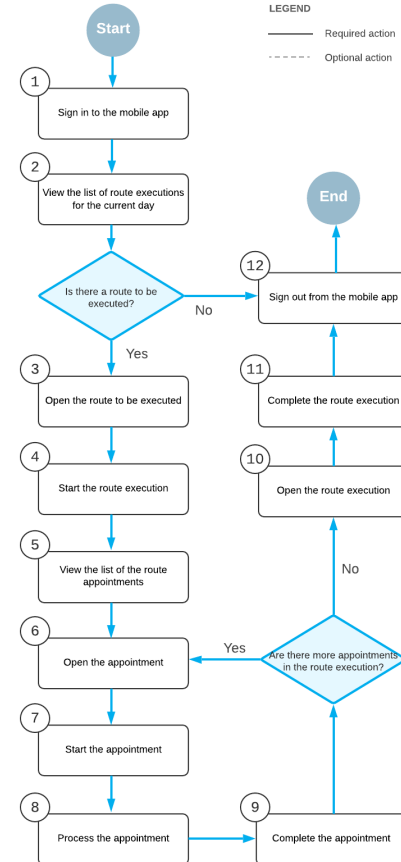
Configuration Overview

- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100300) form: Bing Map API Key
- Route Management Preferences (FS100300) form
- Service Order Type (FS202300) form: *RTE* (behavior: *Route*)
- Non-Stock Items (IN202000) form: *DELIVERY* (billing rule: *Flat Rate*)
- Routes (FS203700) form: *NY2* (Tuesday and Thursday 9:00 AM)

Lesson 15: Executing a Route by Using the Mobile App

Process Overview

1. Start a route execution
2. Processing an appointment
3. Complete the route execution



Summary Day 2

We have learned:

- How to create target equipment manually in the system
- How to create model equipment in the system
- How to register a sell of model equipment or a component
- How to register a replacement of target equipment or a component
- How to create and process service contracts with different billing types in the system
- How to create a route execution on the fly
- How to process a route execution (by using web application and mobile app)
- How to process route service contracts in the system

Question

We can add an appointment to a route execution only by generating from a route service contract schedule.

1. True
2. False

Please complete the survey:

<https://www.surveymonkey.com/r/onlineessions2019>



Thank You

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