End-User Course

Service Management

Training Guide

Acumatica
The Cloud ERP

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Acumatica ERP 2019 R1

Contents

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Software Version - 2019 R1

Introduction

In the course, you will learn about the service management processes in Acumatica ERP. After you complete the course, you will have an understanding of how to work with service orders and appointments in Acumatica ERP and use the mobile application when you are performing services. You will learn to process service orders and appointments in the system. Also, you will learn how to create service orders from opportunities, cases, and sales orders, how to process billing documents related to service orders and appointments, and how to record staff time in the system.

The course is designed to be completed on Acumatica ERP 2019 R1. For educational purposes of this course, you use Acumatica ERP under the trial license that doesn't require activation and provides all available features. For production, you have to activate the purchased license; each particular feature may be a subject to additional licensing; please consult the Acumatica ERP sales policy for details.

How to Use This Course

This end-user course provides a set of lessons that illustrate service management processes in a midsize company. The course should be completed on Acumatica ERP 2019 R1. To complete the course, ask your system administrator to deploy an instance of Acumatica ERP for training and to create a tenant and preload the *U100* data set to it; this data set provides the pre-configured settings and entities you will need as you complete the course. You also have to enable the necessary features and install the mobile app on your device. (You can find detailed instructions on creating a tenant below.)

What Is in a Guide?

The guide includes the *Company Story* topic, lessons, concept topics related to these lessons, and the *Additional References* topic. *Company Story* explains the organizational structure of the company preconfigured in the *U100* dataset, as well as the company's business processes and requirements. Concept topics provide general overviews of the processes that are performed in Acumatica ERP. Each of the lessons of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

What Is in a Lesson?

Each lesson provides a story describing a particular user scenario and an overview of the relevant features that have been enabled in the system; configuration settings that are related to the described scenario are also listed. The lesson provides a brief overview of the process that should be performed to complete the described scenario, and instructions that guide you through the process in Acumatica ERP. At the end of the lesson topics, you can find links to detailed information about the forms used in the lesson.

The lessons are independent and can be completed in any order.

What Are the Documentation Resources?

All the links listed in the *Forms Used* sections of individual lessons refer to the form documentation available on the *https://help.acumatica.com/* website. The *Additional References* topic provides links to Acumatica ERP Help Portal, where you can find additional information on concepts and procedures that are included in this course. Complete documentation, which includes concept topics and form reference topics, is also included in the Acumatica ERP instance, and you can find these topics under the **Help** menu.

How to Create a Tenant with the Needed Data

As mentioned, you should ask your system administrator to first deploy an instance of Acumatica ERP for training. The administrator should then add a tenant with the *U100* data to this Acumatica ERP instance by performing the following instructions:

1. Open the Acumatica ERP Configuration Wizard, and click **Perform Application Maintenance**.
2. On the **Application Maintenance** page of the wizard, click the **Tenant Maintenance** button.
3. In the **SQL Server Authentication** dialog box, which appears, specify the credentials for connecting to the database server, and click **OK**. The **Company Setup** page opens.
4. To create the new tenant, click **New**, and in the **Insert Data** column, select the *U100* data to be preloaded to the tenant.
5. Click **Next**, and on the **Confirm Configuration** page, click **Finish**.

The system adds the new tenant to the Acumatica ERP instance and preloads the selected data. In the first processing step of each lesson, you can find the user credentials to be used for sign-in.

Now you can sign in to the website and enable the necessary features.

How to Enable the Necessary Features

To complete lessons of this training, you have to enable the *Service Management* feature so that you can use the service management functionality of Acumatica ERP.

Perform the following instructions:

1. Launch the Acumatica ERP website, and sign in by using the *brawner* login and the *123* password.
2. On the Enable/Disable Features (CS100000) form, click **Modify** to be able to make changes to the activated features in the system.
3. Select the **Service Management** check box. Leave the other check boxes as they are.
4. Select the **Equipment Management** check box.
5. Click **Enable** on the form toolbar.

How to Install the Mobile App

In the last lesson of this training, you will use the Acumatica ERP mobile app. You can install the Acumatica mobile app on any mobile device that is running Android 4.0 or later. You can instead install the application on a device that is running iOS 8.0 or later, but the appearance and functionality of the application may differ somewhat from what is shown and described in the course.

To install the Acumatica mobile app on an Android device, do the following:

1. On your mobile device, open the Play Store app.
2. Find the Acumatica mobile app.
3. Tap **Install**.

   After the app installation is finished, you can open it.

To install the Acumatica mobile app on an iOS device, do the following:

1. On your mobile device, open the App Store app.
2. Find the Acumatica mobile app.
3. Tap **Get**.
4. Confirm the installation.

   After the app installation is finished, you can open it.

Company Story

This topic explains the organizational structure and operational activity of the company with which you will work during this training.

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where fruit (purchased from wholesale vendors) and the produced jam are stored.
- SweetLife Store: This branch has a retail shop with a small warehouse, to which the goods to be sold are distributed from the company's main warehouse.
- Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch sells juicers, installs juicers, trains customers' employees to operate juicers, and provides juicer servicing.

Operational Activity

The company has been operating starting in the *01-2018* financial period. In November 2018, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. Because the company has grown, the equipment center has begun its operations in *01-2019*.

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers for sale from a large juicer vendor and either purchases the installation service or provides the installation service on its own, depending on the complexity of the installation.

Company Sales and Services

Each company's branch has its own business processes, as follows:

- SweetLife Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafés. The company also conducts home canning training at the customer's location, and webinars on the company's website.
- SweetLife Store: In the store, small retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- Service and Equipment Sales Center: This branch sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle or through USPS, the third-party carrier that provides delivery nationwide and to some customers outside the United States. Customers can pay for order by cash, check, or credit card.

Customer Relationship Management

The company needs to handle a large number of customers, both current and potential, to maximize its sales opportunities. The customers of the company can be divided into the following two types:

- End customers: Organizations that purchase goods or services, or both, from the company
- Referral partners: Partner organizations that endorse the goods and services of the company

Potential customers of each of these types should be analyzed and processed differently, in accordance with the qualification process adopted by the company.

In its pursuit of new potential customers, the marketing department of the company generates a host of leads from various sources: It purchases lists of leads from third parties; it receives direct phone calls and emails from leads attracted by marketing campaigns or referrals; and the company's website invites any user who is interested in the offered services to fill out an online form, which results in yet more leads. Thus, organizing information meaningfully is among the department's highest priorities.

The marketing department also needs to facilitate the process of assigning leads to sales personnel for qualification.

The sales department of the company aims to create as many opportunities as possible and then bring these opportunities to actual sales. To increase repeated sales and to attract new leads, the company runs frequent marketing campaigns and sends company newsletters and special offers targeted at specific audiences.

Overview of Service Management Processes

By using the service management functionality of Acumatica ERP, you can track and manage every detail in your service organization. To do this, you work with two main documents in the system: service orders and appointments.

Service Orders

A service order is an entity in the Acumatica ERP system that represents the initial agreement and intention of the job. The service order contains various information about the job to be performed, including the services requested by a customer. These details include such information as the initial plan that is going to be done (or has already been done) and the location where the services will be (or have been) performed.

Appointments

An appointment is a record in the system that represents the execution of a part (or all) of the job represented by the service order. The appointment can take place in the customer location, customer contact location, or branch location (of your company). The appointment holds the details of the actual services performed, the exact date and time (scheduled and actual) of each service, and the staff member (or members) who delivered each service.

A single service order can consist of a single appointment or multiple appointments, depending on what is needed to complete the service order. An appointment is always linked to only one service order. If you create an appointment and do not select an existing service order to be linked to it, a new service order is automatically created for the appointment.

You can define service orders that don't have appointments associated with them.

Service Management Process

The following diagram illustrates the service management process as a whole; the stages of this process are described in more detail below. This diagram shows this process when invoices are generated for appointments; they can instead be generated for service orders.

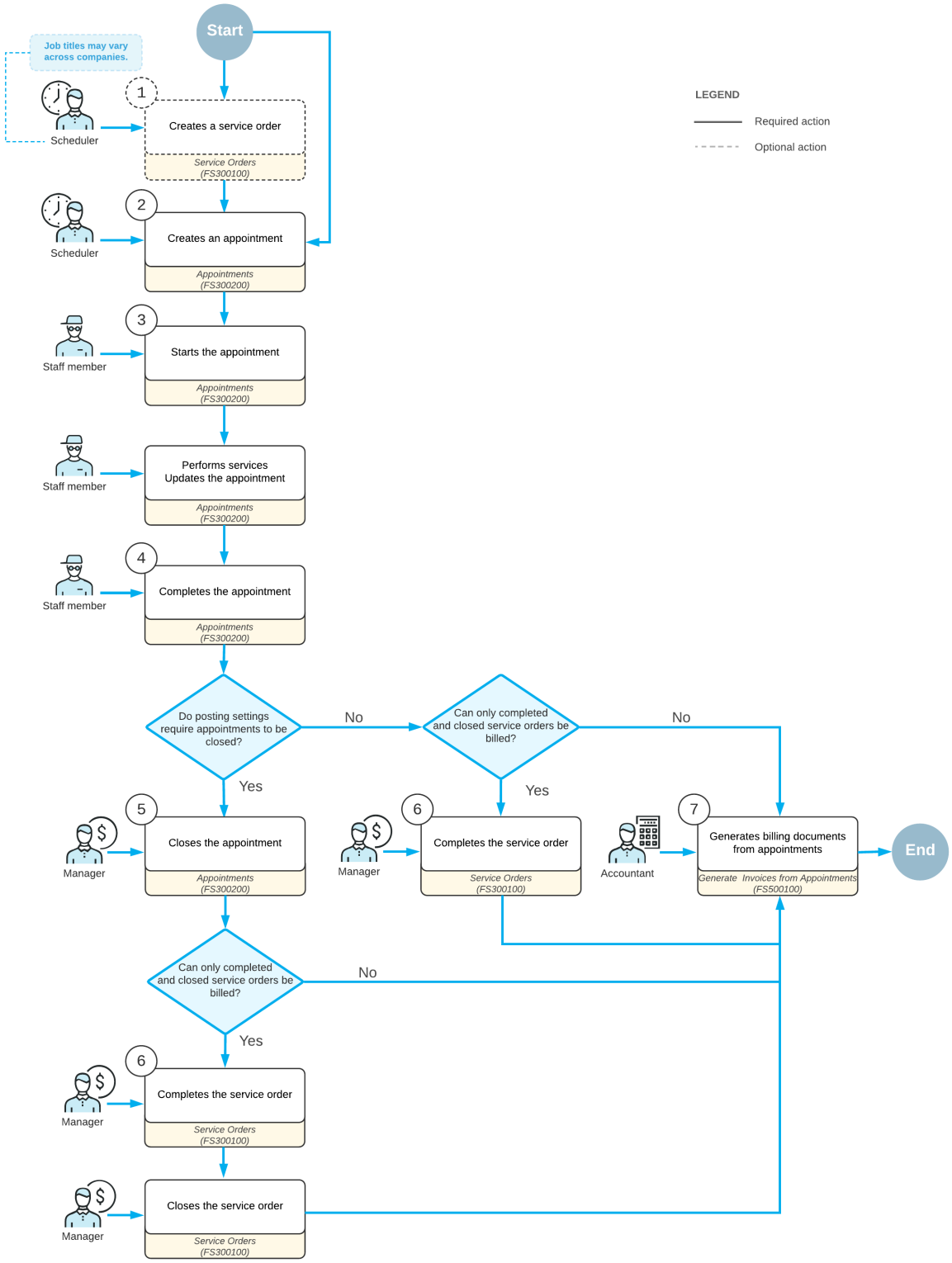


Figure: Service management process (with invoices generated by appointments)

The service management process consists of the following general stages:

1. *Optional: Service order creation*

In the service order, you can define such settings as the scope of the requested services, the customer, the company branch whose employees perform the services, the location where the services are performed, and the estimated date when the services will be performed. The service order can instead be created automatically by the system when an appointment has been created.

2. *Creation of the appointment or appointments*

   You create the appointment (or multiple appointments, if applicable) in the system, specifying the details of each appointment. If the service order has not been created yet, it will be created automatically when you save the created appointment. At this stage, you schedule this appointment or these appointments to deliver the requested service (or services) and assign the staff to perform all requested services.

3. *Start of appointments*

   A staff member goes to the location of the appointment (multiple staff members may go), usually the customer location, and indicates in the system that staff members are starting to perform the services of the appointment. Depending on the settings of the service order type, when the staff member starts the appointment, the system can fill in the actual start time of the appointment and services.

4. *Completion of each appointment of the service order*

   After the staff member has performed the services (or multiple staff members have done so) and entered any additional settings of the appointment, he or she indicates the completion of the appointment in the system, meaning that all operative activities have been done. Depending on the settings of the service order type, when the staff member completes the appointment, the system can fill in the actual end time of the appointment and services; this data is important for services billed based on time.

5. *Optional: Closing of the appointment or appointments associated with the service order*

   The manager usually reviews and closes all appointments after the services are delivered, indicating that the administrative activities related to the appointment have been done. Depending on your settings on the Service Order Types (FS202300) form, this stage can be omitted.

6. *Optional: Service order completion and closing*

   After every appointment in the service order has been completed, the service order can also be completed to indicate that all operative activities of the service order have been done. A manager usually completes and closes a service order after the services have been delivered. Depending on your settings on the Service Order Types (FS202300) form, this stage can be omitted.

7. *Generating invoice documents*

   If you agreed with the customer to generate invoices by appointment, then when each appointment has been completed or closed (depending on the settings of the service order type), you can charge the customer for the services delivered in the appointment. You can configure the billing cycle so that the service order also has to be completed or closed before the invoice is generated.

   If you prefer to generate invoices by service order, then the invoice document can be generated after the service order has been created.

Calendar Board

Because appointment creation and scheduling are the most common tasks in service management, Acumatica ERP gives you a variety of ways to create service orders and appointments. You can create these records as you do in other Acumatica ERP modules, and you can also use the Calendar Boards

—dashboards where you can see the workloads of your staff and where appointments can be created, scheduled, and assigned with a single movement of the mouse.

Through the Calendar Boards, you can do the following:

- Create appointments or delete them
- Assign an appointment to a staff member based on skills, licenses, and other settings, and schedule this appointment
- Change an appointment's estimated start and end time
- Reassign an appointment to another staff member
- Confirm, validate, and clone appointments

Service Order Types

A service order type is a group of general settings, including the behavior type and posting settings, that is specified for each service order or appointment. Depending on the settings of a particular service order type, some specific UI elements are added to or removed from the appropriate form for the service order or appointment of this type.

The posting settings of a service order type include the type of billing document that will be generated for the service order or appointment (AR invoice, sales order, or no document). Other service order type settings include the mailing settings defining how the customer will receive email notifications about certain actions during the service delivery process.

Billing Options

Depending on your needs, you can generate either AR invoices or sales orders and SO invoices for the provided services. If service orders include only services to be provided, you can configure the system to generate AR invoices on the Invoices and Memos (AR301000) that affect accounts receivable. If service orders include stock items along with services to be provided, you have to configure the system to generate sales orders on the Sales Orders (SO301000) form, from which SO invoices are generated.

Because the service management functionality is integrated with the inventory functionality, you can track inventory stock items that your company sells to the customer or uses as repair parts while staff members attend appointments. You can add inventory items to service orders and sell them to the customer; the lines for the sold items will appear in the generated invoices.

You can define whether you want to group multiple appointments or service orders into a single invoice, and even define the frequency of invoicing. These settings are determined by the billing cycles, which can be different for different customers.

Behavior Types

Each service order type is assigned one of the following behavior types, which affect service orders and appointments of the type:

- *Regular*: Service orders of the type are fulfilled by appointments to provide a service to a customer.
- *Internal*: Service orders of the type are fulfilled by appointments inside your company that do not involve a customer.
- *Quote*: Service orders of the type are agreements to provide a service with a specified price to a customer in the future.

In your production environment, we recommend that you create a service order type with the *Internal* behavior for managing internal services and making internal appointments, and another service order type with the *Quote* behavior if you plan to keep track of quotes made to your customers. For services delivered outside of your company, create at least one service order type with the *Regular* behavior.

Other Features

To optimally manage services, you can also define skills and licenses—attributes required for the services provided by the company, and possessed by the staff members delivering these services—to make sure you assign the right employee to perform the requested service.

You can also define service areas that are served by different staff members and then filter staff by the served area when you select the person to assign to the appointment. All filtering options are also available on the Calendar Board.

Lesson 1: Processing a Service Order with One Appointment

In this lesson, you will go through the service management process from the very beginning, starting with creating a service order and ending with generating an invoice for the provided services. Once you complete this lesson, you will grasp the service management process as a whole.

Story

Suppose that Sweet Life Equipment receives an order for the provision of a training and installation service to the company's customer—HM's Bakery and Cafe. The service manager (Pam Brawner) needs to enter the service order into the system, assign a staff member, and schedule an appointment to perform the necessary services. The assigned staff member needs to perform the necessary services at the customer location and complete the appointment in the system. The accountant will then verify the appointment, close the appointment, and generate an AR invoice to bill the customer. You will perform these actions, acting as the service manager, staff member, and accountant.

At this point in learning about the service management process, you will not take into consideration employees' qualifications, working hours, and service areas covered.

Configuration Overview

Various settings have been preconfigured to give you the ability to easily perform the processing described below. The *10 Staff Members* feature (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members, has been enabled on the Enable/Disable Features (CS100000) form.

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *TRN* service order type has been configured on the Service Order Types (FS202300) form to generate AR invoices to bill customers for services that have been provided. That is, **Accounts Receivable** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section of the **Preferences** tab of this form.

On the Customers (AR303000) form, the *HMBAKERY (HM's Bakery and Cafe)* customer has been preconfigured, and the *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *AP AP* billing cycle on the Billing Cycles (FS206000) form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Appointments**

Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

On the Non-Stock Items (IN202000) form, for the *TRAINING* and *INSTALL* non-stock items, the *Service* type is selected. The *TRAINING* service has the *Time* billing rule and the *INSTALL* service has the *Flat Rate* billing rule.

The **Staff Member in Service Management** check box has been selected for *EP00000002 (Todd Bloom)* and *EP00000004 (Alberto Jimenez)* on the Employees (EP203000) form, so you can assign these employees to perform services.

Process Overview

To process a service order with an appointment, you create a new service order on the Service Orders (FS300100) form, add the services to be performed for the order, and create the related appointment on the Appointments (FS300200) form. You then assign a staff member to the appointment. Finally, you process the appointment through completion and closing, and generate an invoice for it.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Entering a Service Order

Create a service order as follows:

1. Open the Service Orders (FS300100) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
   - **Service Order Type**: *TRN*
   - **Customer**: *HMBAKERY (HM's Bakery and Cafe)*
3. On the form toolbar, click **Save**.
4. On the table toolbar of the **Services** tab, click **Add Row**; in the **Inventory ID** column of this row, select *TRAINING*.
5. Add the *INSTALL* service similarly.
6. For a new row, in the **Line Type** column, select *Comment*, and enter the following comment in the **Description** column: `Training for 4 of the customer's employees is necessary after the juicer has been installed.`
7. Again click **Save** on the form toolbar.

Step 3: Creating and Scheduling an Appointment

To create and schedule an appointment, do the following:

1. While you are still viewing the service order on the Service Orders (FS300100) form, on the form toolbar, click **Actions** > **Schedule Appointment**.

   The system opens the Appointments (FS300200) form with the settings that have been specified in the service order filled in.
2. In the **Scheduled Start Time** box of the **Settings** tab, select *9:00 AM*.
3. On the **Staff** tab, assign the staff member to perform the service as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Staff Member** column, select *EP00000002 (Todd Bloom)*.

   c. Add the *EP00000004 (Alberto Jimenez)* staff member similarly.

4. On the form toolbar, click **Save**.

Step 4: Processing the Appointment

Now you will process the appointment on behalf of staff members. Process the appointment from starting it to closing it as follows:

1. On the form toolbar of the Appointments (FS300200) form, click **Actions** > **Start Appointment**.

You start an appointment to indicate that the appointment is being attended.

2. In the **Actual Date and Time** section of the **Settings** tab, select the **Finished** check box.

You select this check box to indicate that the work has been finished during the appointment and no follow-up appointment is necessary.

3. On the form toolbar, click **Actions** > **Complete Appointment**.

You complete an appointment to indicate that the assigned staff members have completed their work on the appointment.

4. On the form toolbar, click **Actions** > **Close Appointment**.

You close an appointment after all information entered into the system about the appointment has been verified and is correct.

Step 5: Generating an Invoice

Now you will process the appointment on behalf of an accountant. To generate an invoice for the appointment, do the following:

1. While still viewing the appointment on the Appointments (FS300200) form, on the form toolbar, click **Actions** > **Generate Invoice**.

The system opens the Invoices and Memos (AR301000) form with the generated invoice, as the screenshot below shows.

2. Verify the details of the invoice on the form and make sure they are correct. In a production environment, the invoice could now be processed in the system.

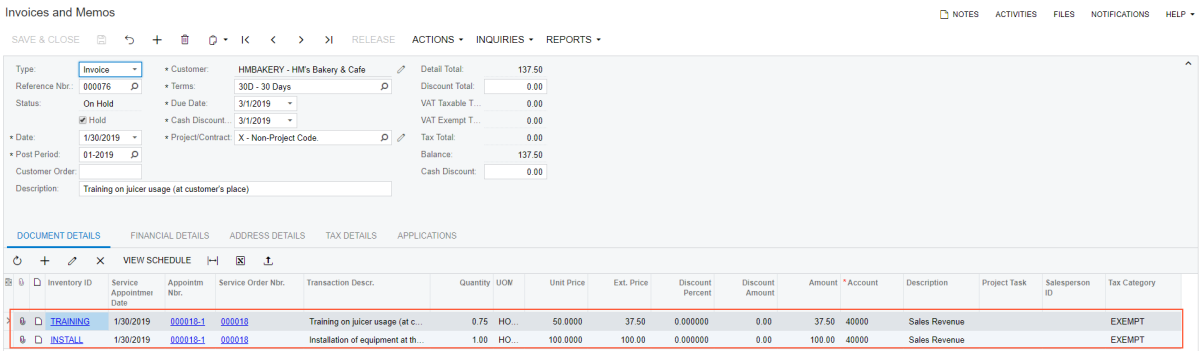


Figure: The invoice generated for the appointment

Forms Used

You have used the following forms for completing this lesson:

- *Appointments* (FS300200)
- *Invoices and Memos* (AR301000)

- *Service Orders* (FS300100)

Process Diagram

For any customer requesting a service from the Sweet Life Equipment company, the company manager, the assigned staff member, and the accountant will take part in the service management process shown in the diagram below.

Processes and job titles may be different in your company.

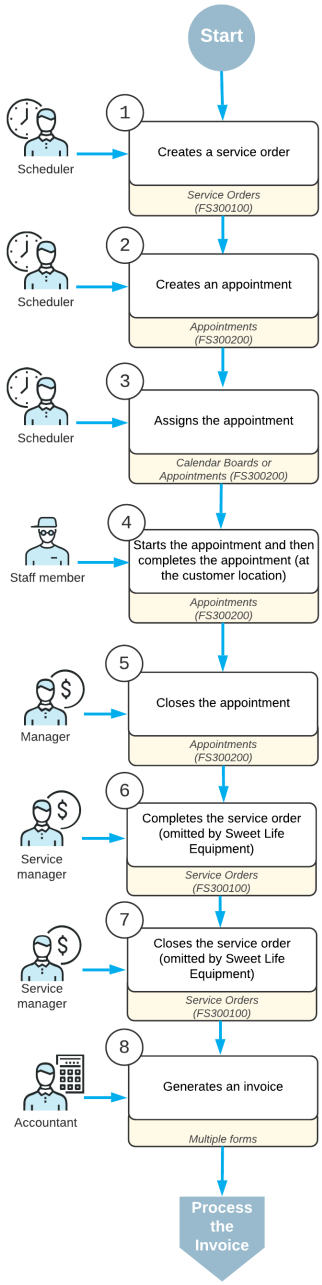


Figure: Service management process of Sweet Life Equipment

Lesson 2: Creating an Appointment Quickly

In this lesson, you will learn how to create an appointment without a service order, add inventory items to the appointment, and assign staff members to the appointment based on their skills.

Story

Suppose that the GoodFood One Restaurant has ordered a juicer with a production rate of 1.5 liters per minute and installation services for the juicer. The service manager (Pam Brawner) and the customer have agreed that the item and the service will be delivered on February 4, 2019, at 9 AM. Acting as the service manager, you need to create an appointment in the system and assign a staff member with the skill that is necessary for performing the service.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *INST* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab).

On the Customers (AR303000) form, the *GOODFOOD (GoodFood One Restaurant)* customer has been defined, and the *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *AP AP* billing cycle on the Billing Cycles (FS206000) form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Appointments**

Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

On the Skills (FS200600) form, the *INSTALLING* skill has been created.

On the Non-Stock Items (IN202000) form, the *INSTALL* service has been defined. This service has the *Service* type and the *Flat Rate* billing rule. To perform this service the *INSTALLING* skill is necessary so this skill has been assigned to the service.

On the Employees (EP203000) form, *EP00000003 (Jon Waite)* has been defined. For this employee, the **Staff Member in Service Management** check box has been selected (on the **General Info** tab) and the *INSTALLING* skill has been added (on the **Skills** tab).

Process Overview

You create an appointment starting from the Appointments (FS300200) form, add an installation service by using the **Service Selector**, and add the inventory item to the appointment. You then assign a staff member by using the **Staff Selector** on the same form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Creating an Appointment

To create an appointment, do the following:

1. Open the Appointments (FS300200) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings for the new appointment:
   - **Service Order Type**: *INST*
   - **Customer**: *GOODFOOD (GoodFood One Restaurant)*
3. On the **Settings** tab, specify the date and time of the appointment as follows:
   a. In the **Scheduled Date** box, select *2/4/2019*.
   b. In the **Scheduled Start Time** box, select *9:00 AM*.
4. Save the appointment.

   Because you have neither created this appointment from a service order nor selected any service order for the appointment, a new service order (with the reference number displayed in the **Service Order Nbr.** box) has been created automatically for the appointment when you saved it.

Step 3: Adding a Service and an Inventory Item to the Appointment

1. While you are still viewing the appointment on the Appointments (FS300200) form, on the table toolbar of the **Services** tab, click **Service Selector**.

   The **Service Selector** dialog box is opened.
2. In the **Service Class ID** box, select *INSTALLING*.

   The dialog box lists only those services that belong to the selected class.
3. In the lower table, double-click the *INSTALL* service, and click **Close**.
4. On the table toolbar of the **Inventory Items** tab, click **Add Row**; in the **Inventory ID** column, select *JUICER15*.
5. Save your changes.

Step 4: Assigning a Staff Member by Using the Staff Selector

To assign a staff member, do the following:

1. On the **Staff** tab of the Appointments (FS300200) form, on the table toolbar, click **Staff Selector**.

   The **Staff Selector** dialog box is opened. In the top left table (below the Selection area), which lists all skills that have been created in the system, the skill or skills that are preferred for performing the service for the appointment are selected. Notice that the *INSTALLING* skill is selected because it is associated with the *INSTALL* service.

   The right table (also below the Selection area) lists only those staff members who match all of the selected skills.

2. In the Skills and License Types tables (at the left), clear all check boxes.

   Notice that all staff members now are available in the Staff Member table (at the right).

3. Select the *INSTALLING* skill.

4. Select the check box for *Jon Waite* to select this staff member, and click **Close**.

5. Save your changes.

   EP00000003 (Jon Waite) is now assigned to the appointment, as the following screenshot shows.

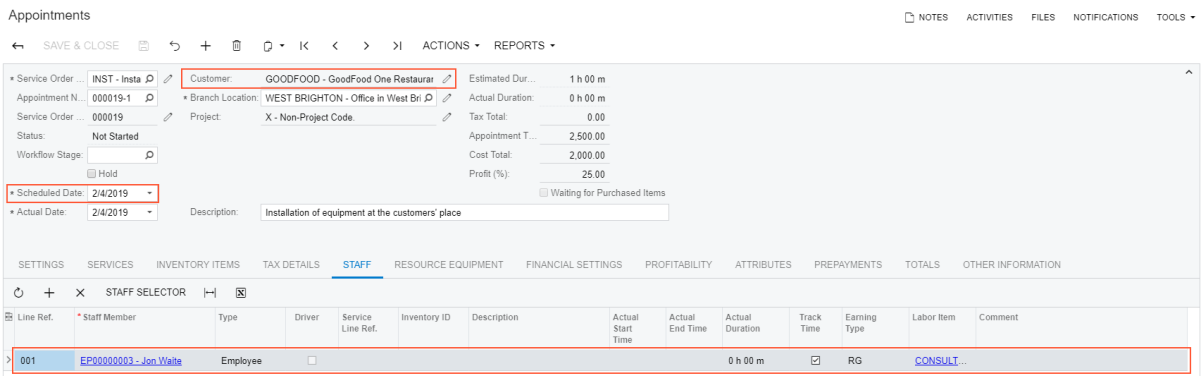


Figure: The appointment with the staff member assigned to it

Form Used

You have completed the lesson by using the *Appointments* (FS300200) form.

Self-Test Exercise

On the Appointments (FS300200) form, create an appointment for *GOODFOOD (GoodFood One Restaurant)* for February 5, 2019, at 9 AM to provide training on how to use juicers. Assign a staff member by using the **Staff Selector**.

Lesson 3: Creating an Appointment Quickly on the Calendar Board

In this lesson, you will learn how to create an appointment without a service order from the Calendar Board, and how to filter staff members that meet the requirements for an appointment by using the staff filter (based on skills, licenses, and service areas).

Story

Suppose that GoodFood One Restaurant has a juicer for which repair works are needed now. The service manager (Pam Brawner) and the customer have agreed that a staff member will come to repair the juicer on January 31, 2019, at 8 AM. A special skill is necessary to repair the juicer, as well as a license from the producer of the juicer. Acting as the service manager, you will create the appointment and assign a staff member that meets these requirements and can perform work at the agreed-upon time.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *MRO* service order type has been configured on the Service Order Types (FS202300) form.

On the Service Management Preferences (FS100100) form, the *MRO* service order type has been selected in the **Default Service Order Type** box, meaning that when a new service order is created on the Service Orders (FS300100) form or an appointment is created on the Appointments (FS300200) or calendar board forms, *MRO* is inserted as its service order type.

On the Skills (FS200600) form, the *REPAIRING* skill has been created.

On the License Types (FS200900) form, the *INST&REP* license type has been configured.

On the Service Areas (FS201900) form, the *BRONX*, *BROOKLYN*, *MANHATTAN*, and *STATENISLAND* service areas have been configured.

On the Non-Stock Items (IN202000) form, the *REPAIR* service has been defined. This service has the *Service* type and the *Flat Rate* billing rule. To perform this service, a staff member must have the *REPAIRING* skill and a license of the *INST&REP* type.

On the Employees (EP203000) form, *EP00000003 (Jon Waite)* has been defined. For this employee, the **Staff Member in Service Management** check box (on the **General Info** tab) has been selected and the *REPAIRING* skill has been added (on the **Skills** tab). *EP00000004 (Alberto Jimenez)* has also been defined on this form; for him, the **Staff Member in Service Management** check box has been selected and the *REPAIRING* skill has been added. Both employees have licenses of the *INST&REP* type on the **Licenses** tab of the Employees form, and both of them has been assigned to the *MANHATTAN* service area on the **Service Areas** tab of the form.

The *GOODFOOD (GoodFood One Restaurant)* customer location is related to the *MANHATTAN* service area.

Process Overview

On the Calendar Board (FS300300) form, you filter staff members for the performed service, making invisible the staff members who don't match the requirements, before you create an appointment. You then select the staff members whose working schedule is suitable for the appointment and create the appointment from the Calendar Board.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Filtering Staff Members for an Appointment

To filter staff members, do the following:

1. Open the Calendar Board (FS300300) form, in the Date box (in the upper right corner of the dashboard), select *1/31/2019*.

   The dashboard displays the staff members of the Sweet Life Equipment branch and their appointments for the next working day.
2. Click the **Staff Filters** button in the top right corner of the dashboard.

   The **Staff Filters** dialog box opens, where you can narrow the selection of staff members by using the elements of the dialog box.
3. On the **Services** tab of the dialog box, select the **Repair of customer's equipment** check box.
4. On the **Service Areas** tab, select **Manhattan**.

   The staff members whose skills, active licenses, and assigned service areas match those of the selected service will be displayed on the Calendar Board after the filter is applied.
5. Click **Filter & Close**.

Step 3: Creating the Appointment

To create the appointment, do the following:

1. On the Calendar Board (FS300300) form, in the column for *Alberto Jimenez*, click at 08:00 AM, and drag the shaded box area downward to 09:30 AM.

   On the Appointments form (FS300200), which is opened in a pop-up window, notice that the scheduled starting date is the next working day, and that the scheduled starting and ending times are 08:00 AM and 09:30 PM, respectively.
2. In the **Customer** box, select *GOODFOOD (GoodFood One Restaurant)*.
3. On the **Settings** tab, in the **Scheduled Date and Time** section, select the **Confirmed** check box.
4. On the table toolbar of the **Services** tab, click **Add Row**; in the **Inventory ID** column, select *REPAIR*.

5. Save your changes.

Notice that *Alberto Jimenez* has been assigned to the appointment on the **Staff** tab, as the following screenshot shows.

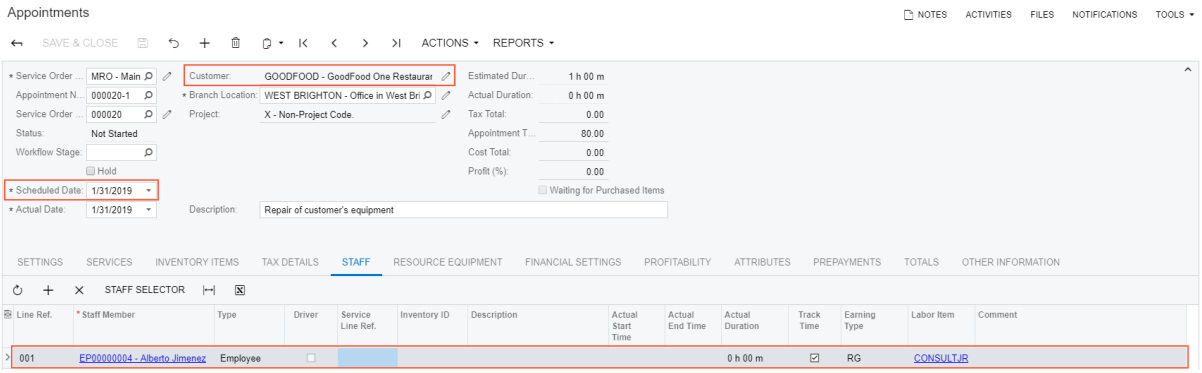


Figure: The appointment with the staff member assigned to it

Forms Used

You have used the following forms for completing this lesson:

- *Appointments* (FS300200)
- *Calendar Board* (FS300300)

Self-Test Exercise

For February 4, 2019, on the Calendar Board (FS300300) form, filter staff for the existing service order (right-click the service order on the **Service Orders** tab and click **Filter Staff**). Create an appointment for one of the staff members.

Lesson 4: Creating an Appointment from the Customers Form and Cloning an Appointment

In this lesson, you will learn how to schedule an appointment from the Customers (AR303000) form. You will learn how to send notification emails to the customer and to your company's own staff members. You will also learn how to clone one appointment to create another with the same details except the date and time of the appointment.

Story

Suppose that the service manager (Pam Brawner) has received a call from HM's Bakery and Cafe about the repair of two juicers that had been sold to the customer previously. The customer has asked for the repairs of the juicers to be performed on two different days: on February 4, 2019, and on February 5, 2019. The service manager needs to check the history of this customer and schedule the appointment for the repair of the first juicer. When the appointment is scheduled, the service manager needs to send confirmation emails both to the assigned employee and to the customer. The service manager will then clone the first appointment to create an appointment for the repair of the second broken juicer. You will perform these actions, acting as the service manager.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

On the Service Management Preferences (FS100100) form, the *MRO* service order type has been selected in the **Default Service Order Type** box, meaning that when a new service order is created on the Service Orders (FS300100) form or an appointment is created on the Appointments (FS300200) or calendar board forms, *MRO* is inserted as its service order type.

On the Non-Stock Items (IN202000) form, the *REPAIR* service has been defined. This service has the *Service* type and the *Flat Rate* billing rule. To perform this service, a staff member must have the *REPAIRING* skill and a license of the *INST&REP* type.

On the Employees (EP203000) form, *EP00000003 (Jon Waite)* has been created. For this employee, the **Staff Member in Service Management** check box has been selected (on the **General Info** tab), the *REPAIRING* skill has been added (on the **Skills** tab), the license of the *INST&REP* type has been added (on the **Licenses** tab). The **Allow Appointment Notification** check box has been selected for Jon Waite so that the notification emails about appointments can be sent to the staff member.

On the Customers (AR303000) form, the *HMBAKERY (HM's Bakery and Cafe)* customer has been preconfigured. The *AP AP* billing cycle has been selected and the **Allow Appointment Notification** check box has been selected in the **Service Management** section of the **Billing Settings** tab so that notification emails about appointments can be sent to the customer.

Process Overview

You open the customer's appointment history from the Customers (AR303000) form, and after reviewing it, create the first appointment from the Calendar Board (FS300300) form. By using the

Appointments (FS300200) form, you then send notification emails about the appointment to the customer and staff member. Finally, you clone the created appointment to a new one by using the Clone Appointments (FS500201) form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Scheduling an Appointment from the Customers From

To schedule an appointment, do the following:

1. Open the Customers (AR303000) form, and select *HMBAKERY (HM's Bakery and Cafe)* in the **Customer ID** box.
2. On the form toolbar, click **Inquiries** > **Appointment History**.

   The Appointment Summary (FS400100) form is opened in a new window.
3. In the Summary area, clear the **Staff Member** box.

   The list of all appointments related to the customer appears.
4. Return to the Customers (AR303000) form.
5. On the form toolbar, click **Actions** > **Schedule on the Calendar Board**.

   The Calendar Board (FS300300) form is opened in a new window.
6. On the Calendar Board, in the Date box (in the top right corner of the dashboard), change the calendar date to *1/31/2019*.
7. On the dashboard, point to *Jon Waite* at 16:00, and drag the bottom of the shaded box to 17:30.
8. In the Summary area of the Appointments form (FS300200), which is opened with the customer settings filled in, on the **Services** tab, add the *REPAIR* service.
9. Save the appointment.

Step 3: Sending Appointment Confirmation Emails

To send emails with confirmation of the scheduled appointment, do the following:

1. While you are still viewing the appointment on the Appointments (FS300200) form, on the **Settings** tab, in the **Scheduled Date and Time** section, make sure the **Confirmed** check box is selected.

   This setting indicates that the appointment date and time have been confirmed with the customer.
2. On the form toolbar, click **Actions** > **Send Email Confirmation to Customer**.
3. On the form toolbar, click **Actions** > **Send Email Confirmation to Staff Member**.

4. On the title toolbar, click **Activities**, and in the **Task & Activities** pop-up window, which opens, double-click the emails to review what has been sent to the staff member and to the customer.
5. Close the pop-up windows.

Step 4: Cloning the Appointment

To clone the appointment you created in Step 2, do the following:

1. While you are still viewing the appointment on the Appointments (FS300200) form, on the form toolbar, click **Actions** > **Clone Appointment**.

   The Clone Appointments (FS500201) form opens.
2. In the **Date** box of the **New Date and Time** section, select *2/4/2019*.
3. On the form toolbar, click **Clone Appointment**.

   The new appointment is generated with the same details as those of the original appointment except for the scheduled date, as the following screenshot shows.

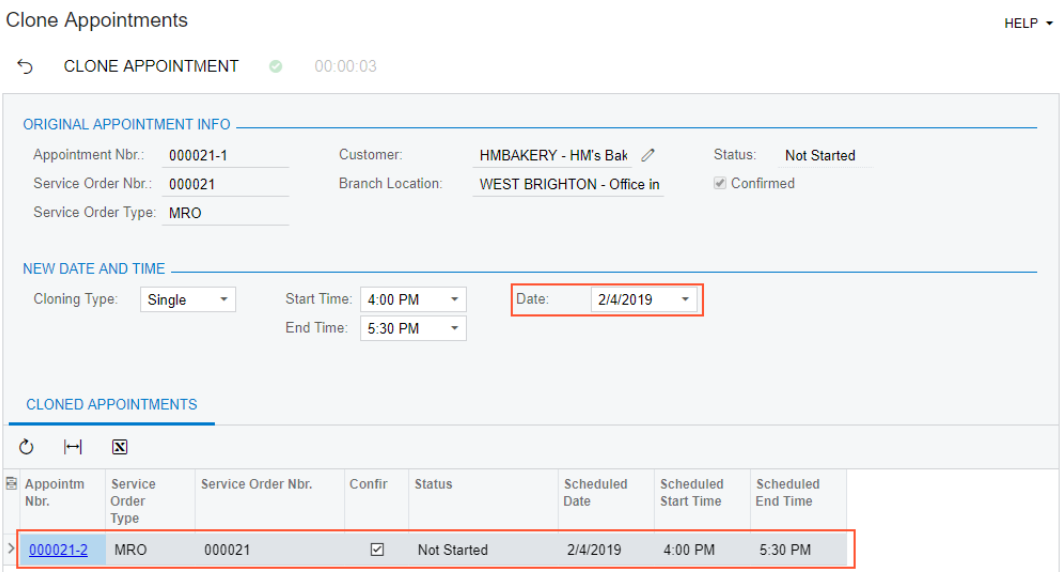


Figure: The cloned appointment

Forms Used

You have used the following forms for completing this lesson:

- *Appointment Summary* (FS400100)
- *Appointments* (FS300200)
- *Calendar Board* (FS300300)
- *Clone Appointments* (FS500201)
- *Customers* (AR303000)
- *Outgoing* (CO409020)

Self-Test Exercise

Create an appointment for *GOODFOOD (GoodFood One Restaurant)* by scheduling an appointment from the Customers (AR303000) form on February 11, 2019. Clone the appointment to multiple appointments (set **Cloning Type** to *Multiple*) on February 13, 2019 and on February 15, 2019.

You can use the **Clone Appointments** button on the Appointments (FS300200) form to clone the appointment selected on the form.

Lesson 5: Creating a Service Order from an Opportunity

In this lesson, you will learn how to create a service order from an opportunity with the submitted quote.

Story

Suppose that the Thai Food Restaurant customer has called and requested a proposal for some products of the Sweet Life Equipment company, along with installation services for the products. The service manager (Pam Brawner) of your company has received the opportunity and needs to enter it into the system. The service manager then needs to prepare a sales quote and send it to the customer for review. Suppose that after reviewing the proposal, the customer will decide to procure the company for the services and products, so the opportunity will be won. The service manager then needs to prepare a service order based on the opportunity, and schedule an appointment for a staff member. You will act as the service manager in performing all of these actions.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *Sales Quotes*, which provides the support of the functionality of sales quotes for opportunities
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *INST* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab).

The **Staff Member in Service Management** check box has been selected for *EP00000003 (Jon Waite)* on the Employees (EP203000) form, so you can assign these employees to perform services.

Process Overview

In the process of creating a service order from an opportunity, you create a new opportunity on the Opportunities (CR304000) form and add the applicable service to be performed and stock item to be sold to this opportunity. You then create a sales quote for the customer, submit it, and send it to the customer. Finally, you create a service order based on the opportunity and schedule appointments.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Creating an Opportunity

You create an opportunity as follows:

1. Open the Opportunities (CR304000) form.
2. Create a new opportunity with the following settings:
   - **Class ID**: *SERVICE*
   - **Subject**: `Sale of a juicer and installation service`
   - **Business Account**: *TOMYUM (Thai Food Restaurant)*
3. Save the opportunity you have created.
4. On the **Document Details** tab, add the *INSTALL* item and set quantity to `1`.
5. Add the *JUICER15* item and set quantity to `1`.
6. In the **Status** box, select *Open*.
7. Save your changes.

Step 3: Sending a Quote to the Customer

You create and send the quote as follows:

1. While you are still viewing the opportunity on the Opportunities (CR304000) form, on the form toolbar, click **Create Quote**.
2. In the **Create New Quote** dialog box, which opens, click **Create and Review**.

   The Sales Quotes (CR304500) form opens with the created quote.
3. On the form toolbar, click **Submit Quote**.

Step 4: Creating a Service Order from the Opportunity

To create a service order, do the following:

1. Go back to the opportunity you created on the Opportunities (CR304000) form.
2. In the **Stage** box, select *Won*, and save the opportunity.
3. On the form toolbar, click **Actions** > **Create Service Order**.
4. In the **Create Service Order** dialog box, which opens, in the **Service Order Type** box, select *INST (Installation Services)*, and click **OK**.

   The Service Orders (FS300100) form opens with the details from the opportunity filled in. Notice that the service order has the service and the inventory item that have been copied from the related opportunity (on the **Services** and **Inventory Items** tabs, respectively); the service order is ready to be processed.
5. Save the service order.
6. In the **Source Info** section of the **Other Information** tab, verify that *Opportunities* is specified in the **Document Type** box and the reference number of the related opportunity has been inserted in the **Reference Nbr.** box.

Step 5: Scheduling an Appointment

Schedule an appointment as follows:

1. While you are still viewing the service order on the Service Orders (FS300100) form, on the form toolbar, click **Actions** > **Schedule Appointments**.
2. In the **Scheduled Date** box of the **Settings** tab, select *2/6/2019*.
3. In the **Scheduled Start Time** box, select *2:00 PM*.
4. Save your the appointment.
5. On the form toolbar, click **Actions** > **Schedule on the Calendar Board**.

   The Calendar Board (FS300300) form opens.
6. On the **Unassigned Appointments** tab, click the appointment you just created, and drag it to the column for *Jon Waite*.

   The appointment is now scheduled and the staff member is assigned to it, as the following screenshot shows.

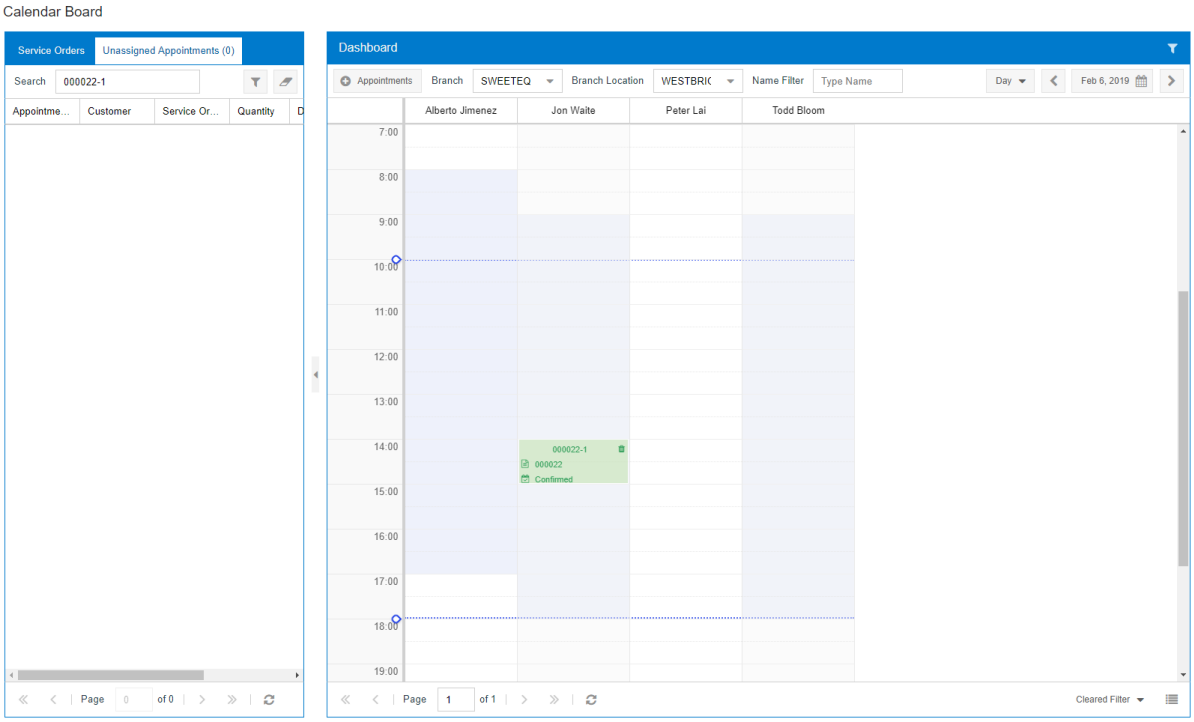


Figure: The scheduled appointment

Forms Used

You have used the following forms for completing this lesson:

- *Appointments* (FS300200)
- *Calendar Board* (FS300300)
- *Opportunities* (CR304000)
- *Sales Quotes* (CR304500)
- *Service Orders* (FS300100)

Process Diagram

In the diagram below, you can see the entire workflow of processing the opportunity and the related documents and entities in the system.

Processes and job titles may be different in your company.

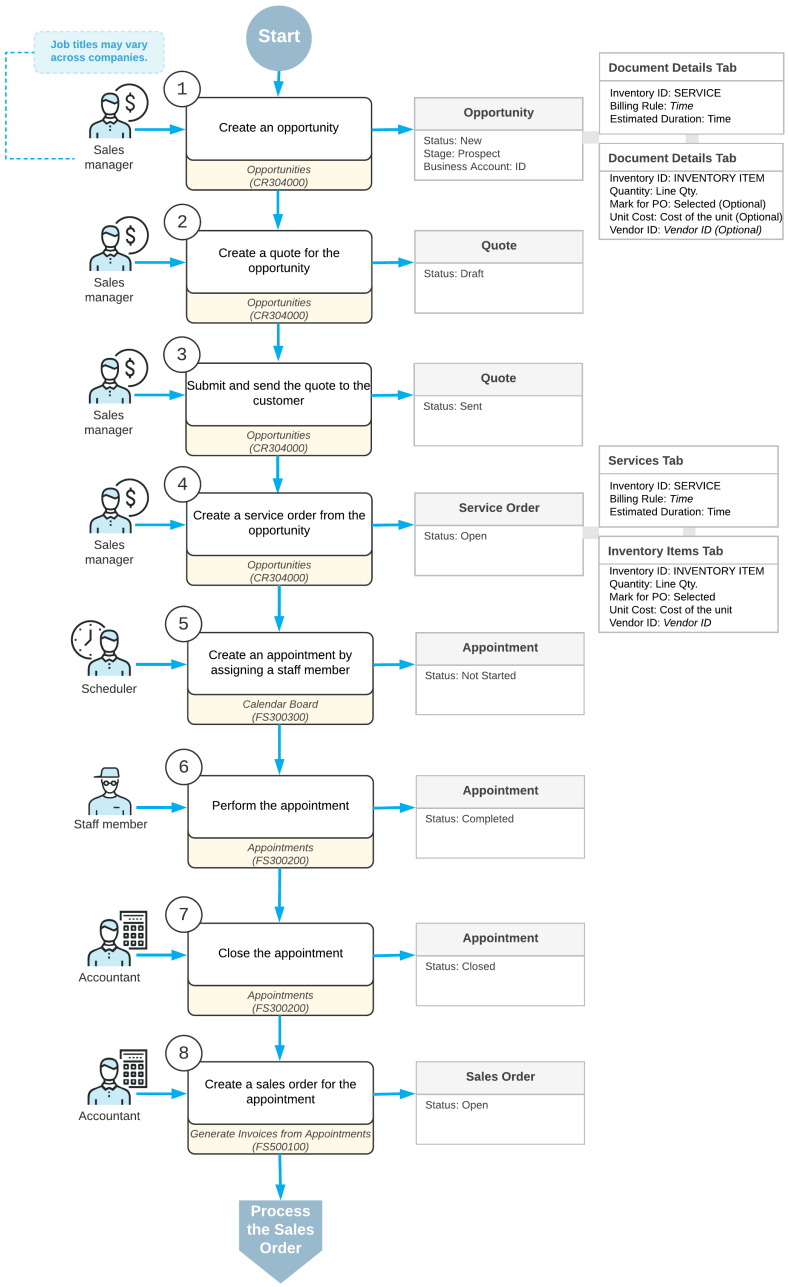


Figure: Opportunity processing along with the service order

Lesson 6: Creating a Service Order from a Sales Order

In this lesson, you will learn how to create a service order from a sales order. You will also learn how to add an inventory item to a service order that has prepaid service or inventory lines, and how this service order will be billed.

Story

Suppose that Sweet Life Equipment has sold the GoodFood One Restaurant customer a juicer in combination with installation and repair services. The manager (Pam Brawner) needs to create a sales order for the juicer and the services, and then schedule the appointment to deliver the services.

During the appointment, suppose that the customer decides to buy an additional inventory item (a plastic container for juice). The assigned staff member needs to add this item to the service order. The accountant will create separate sales orders and invoices that include the extra item because it was not in the original sales order. You will perform these actions, acting as the service manager, staff member, and accountant.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *Inventory*, which provides the ability to create sales and purchase orders with stock items
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

On the Customers (AR303000) form, for the *GOODFOOD (GoodFood One Restaurant)* customer has been defined, and the *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *AP AP* billing cycle on the Billing Cycles (FS206000) form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Appointments**

Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

On the Order Types (SO201000) form, for the *SO* and *IN* order types, the **Enable Field Services Integration** check box has been selected for this order type.

The *INST* service order type has been configured to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section on the Service Order Types (FS202300) form. In the **Order Type for Invoice** box, the *IN* order type has been selected.

On the Non-Stock Items (IN202000) form, for the *INSTALL* non-stock item, the *Service* type is selected.

The **Staff Member in Service Management** check box has been selected for *EP00000003 (Jon Waite)* on the Employees (EP203000) form, so you can assign these employees to perform services.

Process Overview

To create a service order from a sales order, you first create a sales order on the Sales Orders (SO301000) form with the inventory items to be sold and the services to be provided, and you create a related service order from this form. You then schedule the appointment to perform the needed services and complete the appointment. Finally, when an item has been added during the appointment, you generate a sales order for it from the Appointments (FS300200) form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Creating a Service Order Along with the Sales Order

You create a sales order as follows:

1. Open the Sales Orders (SO301000) form.
2. Create a new sales order with the following settings in the Summary area:
   - **Order Type**: *SO*
   - **Customer**: *GOODFOOD (GoodFood One Restaurant)*
   - **Description**: `Sale of a juicer and installation service`
3. On the **Document Details** tab, add a row with the following settings:
   - **Inventory ID**: *INSTALL*
   - **Require Appointment**: Selected
   - **Warehouse**: *EQUIPHOUSE*
   - **Quantity**: `1.00`
4. Add one more row with the following settings:
   - **Inventory ID**: *JUICER15*
   - **Require Appointment**: Selected
   - **Quantity**: `1.00`
5. Save the sales order you have created.
6. On the form toolbar, click **Actions** > **Create Service Order**.
7. In the **Create Service Order** dialog box, which opens, in the **Service Order Type** box, make sure *INST (Installation Services)* is selected, and click **OK**.

   The Service Orders (FS300100) form opens with the details from the opportunity filled in. Notice that the service order has the service and the inventory item that have been copied from the related sales order (on the **Services** and **Inventory Items** tabs, respectively); the service order is ready to be processed.

8. Save the service order.
9. In the **Source Info** section of the **Other Information** tab, verify that *SO Order* is specified in the **Document Type** box and the order type and the reference number of the related sales order have been inserted in the **Reference Nbr.** box.

Step 3: Creating an Appointment from the Sales Orders Form

To create an appointment related to the sales order, do the following:

1. Open the Sales Orders (SO301000) form with the sales order you have created.
2. On the form toolbar, click **Actions** > **Schedule on the Calendar Board**.

   The Calendar Board (FS300300) opens, displaying only the service order the system has created for the sales order, in a new browser tab.
3. On the **Service Orders** tab of the Calendar Board, right-click the service order, and click **Filter Staff** to apply filters.
4. Drag the service order from the **Service Orders** tab into the *Jon Waite* column of the dashboard area so that the start time of the appointment is set to 13:00.
5. On the Appointments (FS300200) form, which has been opened, click **Save** on the form toolbar.

Step 4: Attending the Appointment

Now you will process the appointment on behalf of Jon Waite. To perform the needed actions involved with attending the appointment, do the following:

1. Open the Staff Calendar Board (FS300400) form.
2. In the **Staff** box, select *Jon Waite*.
3. Make sure that the *1/30/2019* is selected in the **Date** box.
4. Click the link on the appointment you have created to open the appointment.

   The Appointments (FS300200) form opens.
5. On the form toolbar of the Appointments (FS300200) form, click **Actions** > **Start Appointment**.
6. On the **Inventory Items** tab, click the **Add Row** button, add a row with the following settings:
   - **Inventory ID**: *CONTAINER*
   - **Equipment Action**: *N/A*
   - **Estimated Quantity**: `1.00`

   Notice that for the *JUICER15* item added to the sales order, the **Prepaid Item** check box is selected, and for the newly added inventory item, the **Prepaid Item** check box is cleared. Also, the **Billable** check box is selected for the item, which indicates that it will be added to another sales order rather than to the original sales order.
7. Save your changes.
8. In the Summary area, select the **Finished** check box.
9. On the form toolbar, click **Actions** > **Complete Appointment**.
10. On the form toolbar, click **Actions** > **Close Appointment**.

Step 5: Generating an Invoice for the Additional Item

You generate the invoice as follows:

1. While you are still viewing the appointment on the Appointments (FS300200) form, on the form toolbar, click **Actions** > **Generate Invoice**.

   The system opens the Sales Orders (SO301000) form with the generated invoice.

2. Verify that only the inventory item added during the appointment has been added to the sales order, as the following screenshot shows.

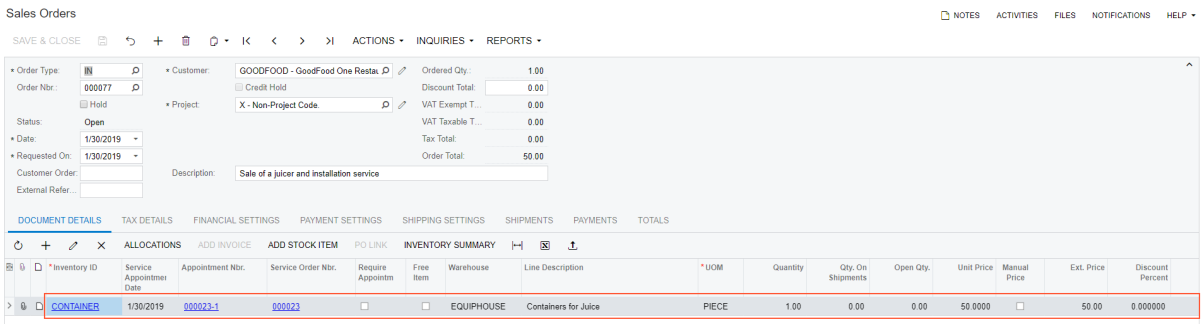


Figure: The sales order generated for the additional item

Two sales orders have been created in the system: the original one for the requested service and item, and the second one to bill the customer for additional item that was not included in the original sales order.

Forms Used

You have used the following forms for completing this lesson:

- *Appointments* (FS300200)
- *Calendar Board* (FS300300)
- *Sales Orders* (SO301000)
- *Staff Calendar Board* (FS300400)

Process Diagram

In the diagram below, you can see the general workflow of processing a sales order along with a service order in the system.

Processes and job titles may be different in your company.

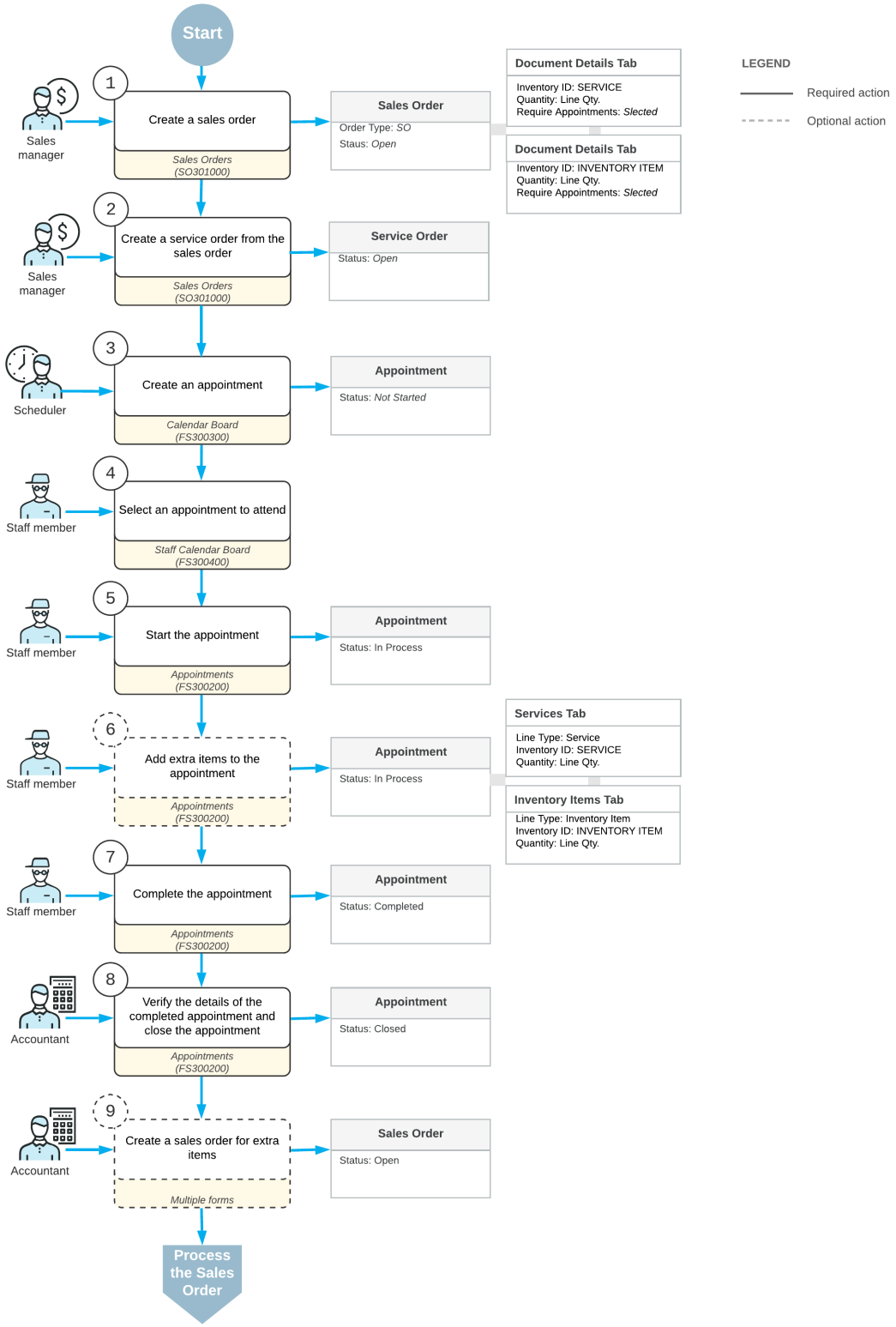


Figure: Sales order processing along with service order processing

Lesson 7: Creating a Service Order Along with a Case

In this lesson, you will learn how to create a service order from a case. You will go through the service management process, from creating the case through closing it.

Story

Sweet Life Equipment provides support to its customers on equipment that the company sells, and these support services are billed to the customer on a per-case basis. The Thai Food Restaurant customer has requested the replacement of a component in the juicer that the company purchased earlier. Acting as the manager of Sweet Life Equipment (Pam Brawner), you will create a case for which an appointment should be scheduled and the replacement services need to be performed. You will also continue the processing of the related service order through the closing of the case, acting as the respective employees.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *Case Management*, which provides the support of the case functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *MRO* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab). This service order type has been selected in the **Default Service Order Type for Cases** box, meaning that when a new service order is created from the Cases (CR306000) form, *MRO* is inserted as its service order type.

On the Employees (EP203000) form, *Alberto Jimenez* has been defined on this form; for him, the **Staff Member in Service Management** check box has been selected and the *REPAIRING* skill has been added.

Process Overview

To create a service order along with a case, you create a new case on the Cases (CR306000) and a service order for it on the Service Orders (FS300100) form. You then add the service to be performed by creating the related task on the Task (CR306020) form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Creating a Case

To create the case, perform the following instructions:

1. Open the Cases (CR306000) form, and click **Add New Record**.
2. In the Summary area of this form, specify the following settings:
   - **Class ID**: *SUPPORT*
   - **Business Account**: *TOMYUM (Thai Food Restaurant)*
   - **Subject**: `Component replacement is necessary`
3. On the **Details** tab, briefly describe the situation by entering the following: `The component of the juicer has a defect; replacement with a new one is necessary`.
4. Save the case you have created.

Step 3: Creating a Service Order from the Case

To create a service order from the case, perform the following instructions:

1. On the form toolbar of the Cases (CR306000) form while you are still viewing the case, click **Actions** > **Create Service Order**.
2. In the **Create Service Order** dialog box, which opens, make sure *MRO (Maintenance, repair and operations)* is selected in the **Service Order Type** box, and click **OK**.

   The Service Orders (FS300100) form opens with the customer details inserted. Note that services have not yet been added to the service order.
3. In the **Source Info** section of the **Other Information** tab, verify that the system has inserted *Case* as the document type and the reference number of the created case for the service order.
4. On the form toolbar, click **Save & Close.**

Step 4: Adding Services

1. On the **Activities** tab of the Cases (CR306000) form while you are again viewing the case, click **Add Task**.

   The Task (CR306020) form opens. You must create a task in order to add a service for the case.
2. In the **Summary** box of the **Details** tab, type `Replacement of a component`.
3. In the **Service** box, select *REPAIR*.
4. On the form toolbar, click **Save & Close**.

   This closes the Task (CR306020) form. The case now has one task associated with it. The service associated with the task is automatically added to the service order related to the case on the **Services** tab of the Service Orders (FS300100) form. You can now proceed to creating an appointment for this service order and assigning the appointment to the employee who is the best fit to deliver the installation service.
5. In the **Status** box, change the status to *Open*.
6. Save the case.

Step 5: Scheduling an Appointment

To schedule the appointment, do the following steps:

1. On the Cases (CR306000) form, click **Actions** > **Schedule on the Calendar Board** on the form toolbar.

   The Calendar Board (FS300300) form opens with the service order related to the case listed on the **Service Orders** tab.

2. In the Date box, make sure the *1/30/2019* date is selected.

3. Drag the service order to the column of *Alberto Jimenez* at 15:00.

   The Appointments (FS300200) form opens.

4. Click **Save**.

Step 6: Processing the Appointment

Now you will process the appointment on behalf of Alberto Jimenez. Process the appointment as follows:

1. On the Appointments (FS300200) form toolbar, click **Actions** > **Start Appointment**.

2. In the **Actual Date and Time** section of the **Settings** tab, select the **Finished** check box.

3. On the form toolbar, click **Actions** > **Complete Appointment**.

4. On the form toolbar, click **Actions** > **Close Appointment**.

   The service required to complete the case has been delivered, and you have completed and closed the corresponding appointment. Now you can complete the task and close the related case; these actions must be performed manually.

Step 7: Closing the Case

Do the following steps:

1. On the Cases form (CR306000), open the case that you created.

2. On the **Activities** tab, click the link of the task associated with the case in the **Summary** column.

3. On the form toolbar of the Task (CR306020) form, which opens, click **Complete**.

   Now the task is completed in the system, and you can close the case.

4. Change the status of the case to *Closed* (see the screenshot below).

5. Save the case.

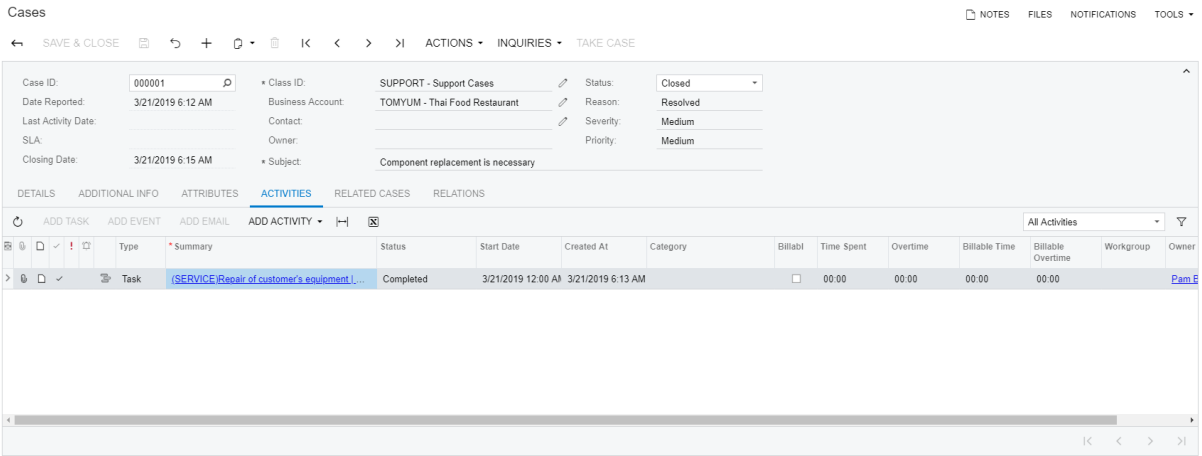


Figure: The closed case

Now you would generate an invoice to bill the customer. (In this lesson, we will not perform this action.)

Forms Used

You have used the following forms for completing this lesson:

- *Appointments* (FS300200)
- *Calendar Board* (FS300300)
- *Cases* (CR306000)
- *Service Orders* (FS300100)
- *Task* (CR306020)

Process Diagram

In the diagram below, you can see the general workflow of processing a case along with a service order in the system.

Processes and job titles may be different in your company.

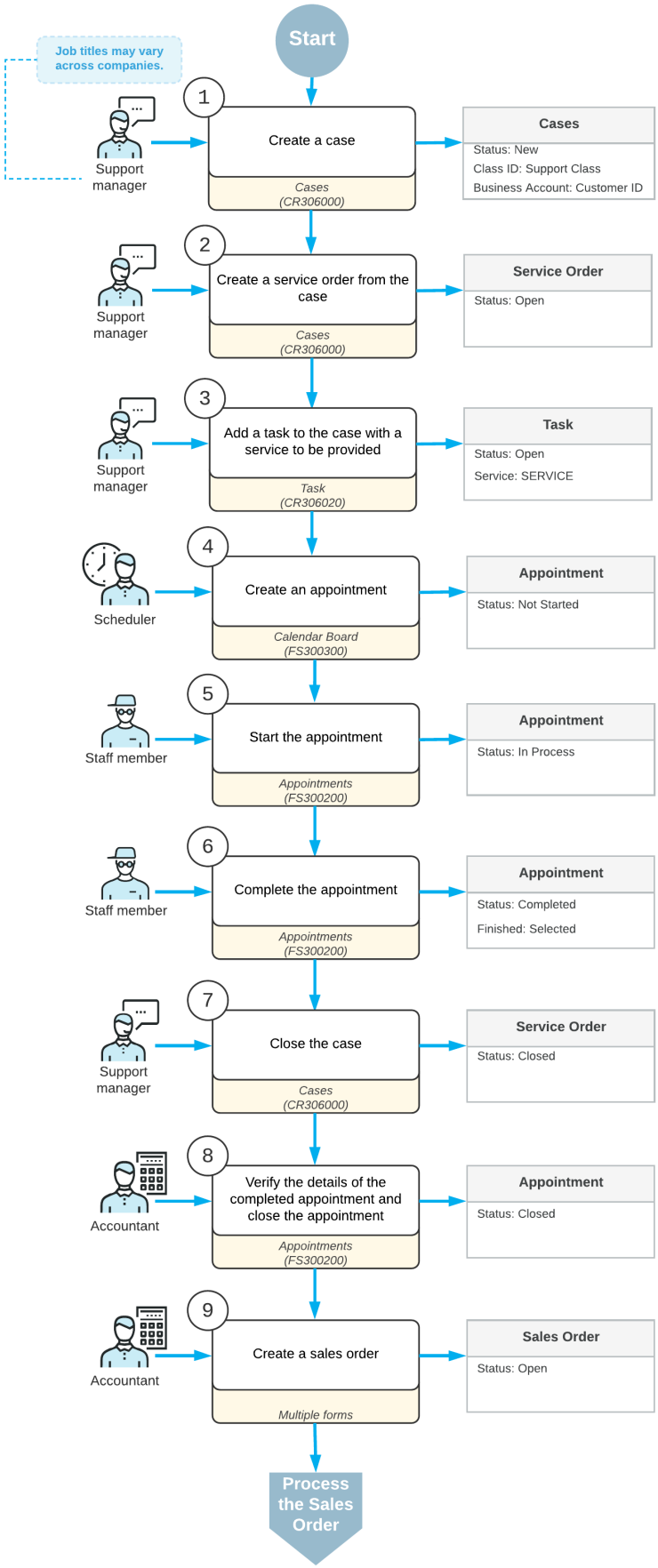


Figure: Case processing along with service order processing

Overview of Billing Cycles

A billing cycle, defined in Acumatica ERP on the Billing Cycles form (FS206000), is a series of settings that defines how the services provided by the company are going to be billed.

Billing cycles are assigned to customers on the Customers (AR303000) form, thus designating how each customer will be billed. One billing cycle can be assigned to any number of customers.

You can also have multiple billing cycles assigned to the same customer. In this case, each billing cycle is associated with a service order type for the customer. You can use this capability if the **Manage Multiple Billing Cycles per Customer** check box is selected on the Service Management Preferences form (FS100100). The **Multiple Billing Cycles per Customers** setting is outside of the scope of this course.

Specifying the Document Generation Option

For each billing cycle, under **Generate Invoices From** on the Billing Cycles form (FS206000), you can select one of the following option buttons for generating billing documents:

- **Appointments**: The customer is billed based on what was done during each appointment.

  We recommend that you use this option when you bill the customer for the actual work time of the appointments or when you bill the customer after the appointments have occurred.

- **Service Orders**: The customer is billed based on service orders.

  We recommend that you use this option when you don't need an appointment to bill the service, or when you want to generate a billing document for the estimated price and hours.

Specifying the Grouping Option

For the billing cycle, on the Billing Cycles form (FS206000), you can also define (under **Group Invoices By**) what the generated billing documents will be grouped by:

- **Appointments**: For each appointment billed, a single invoice is generated in the appropriate module (depending on the service order type).
- **Service Orders**: The generated invoices are grouped by service order. If the services are billed by appointments and grouped by service orders, this setting means that one service order with multiple appointments will result in one invoice being generated in the appropriate module (depending on the service order type). If the services are billed by service orders and grouped by service orders, a single invoice is generated in the appropriate module (depending on the service order type) for each service order.
- **Customer Order**: The generated invoices are grouped by the order provided by the customer. This setting is outside of the scope of this training.
- **External Reference**: The generated invoices are grouped by the purchase order provided by the customer. This setting is outside of the scope of this training.
- **Time Frame**: Invoices are grouped with the frequency you specify: on a particular day of the week or the month. If the services are billed by appointments, for one customer, a single document is generated containing all of the appointments' services performed up to the specified day.

Generating Invoices from Appointments and Grouping by Appointment

The diagram below demonstrates how the customer billing is performed if the billing cycle assigned to the customer is set to generate billing documents from appointments and group them by appointment.

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

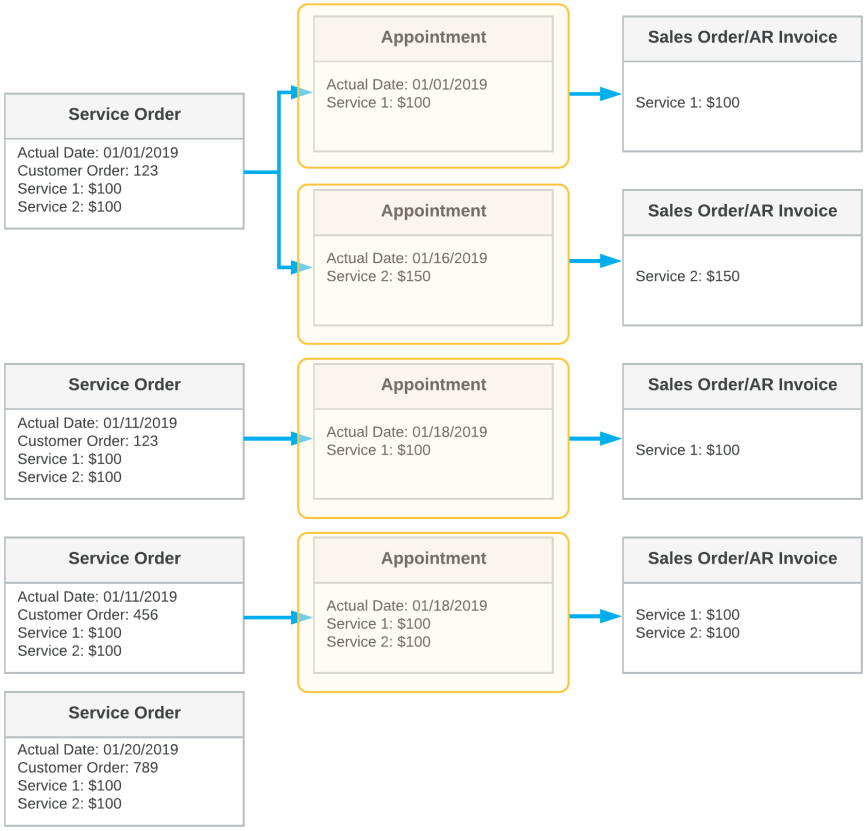


Figure: Generating invoices for appointments and grouping by appointment

Generating Invoices from Appointments and Grouping by Service Order

The diagram below demonstrates how the customer billing is performed if the billing cycle assigned to the customer is set to generate billing documents from appointments and group them by service order.

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

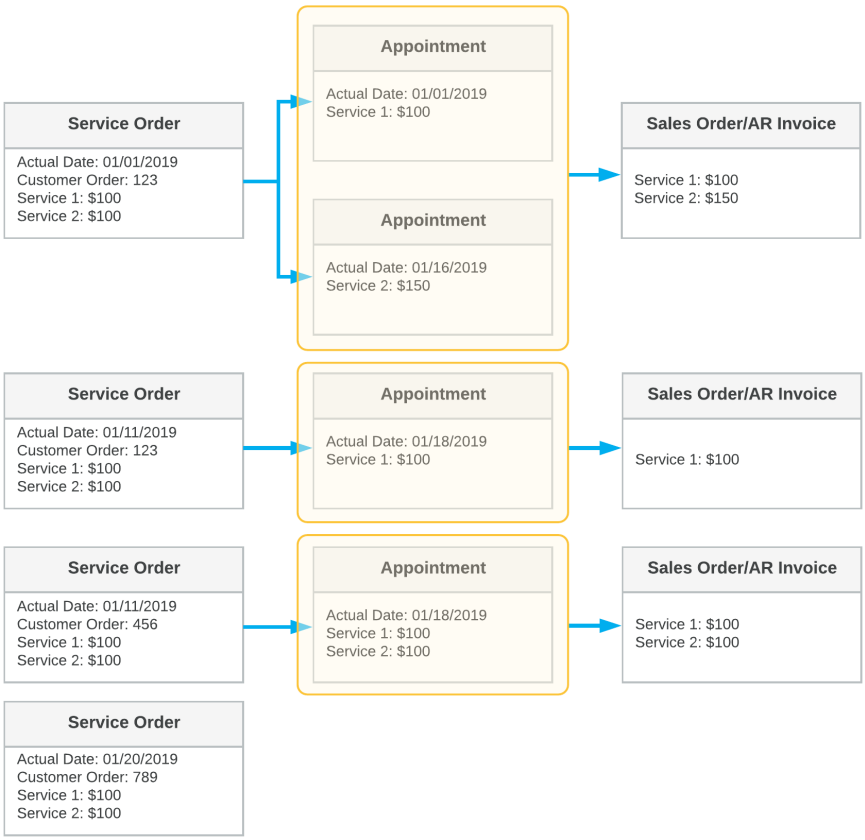


Figure: Generating invoices for appointments and grouping by service order

Generating Invoices from Appointments and Grouping by Customer Order or External Reference

The diagram below demonstrates how the customer billing is performed if the billing cycle assigned to the customer is set to generate billing documents from appointments and group them by purchase order or customer order.

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

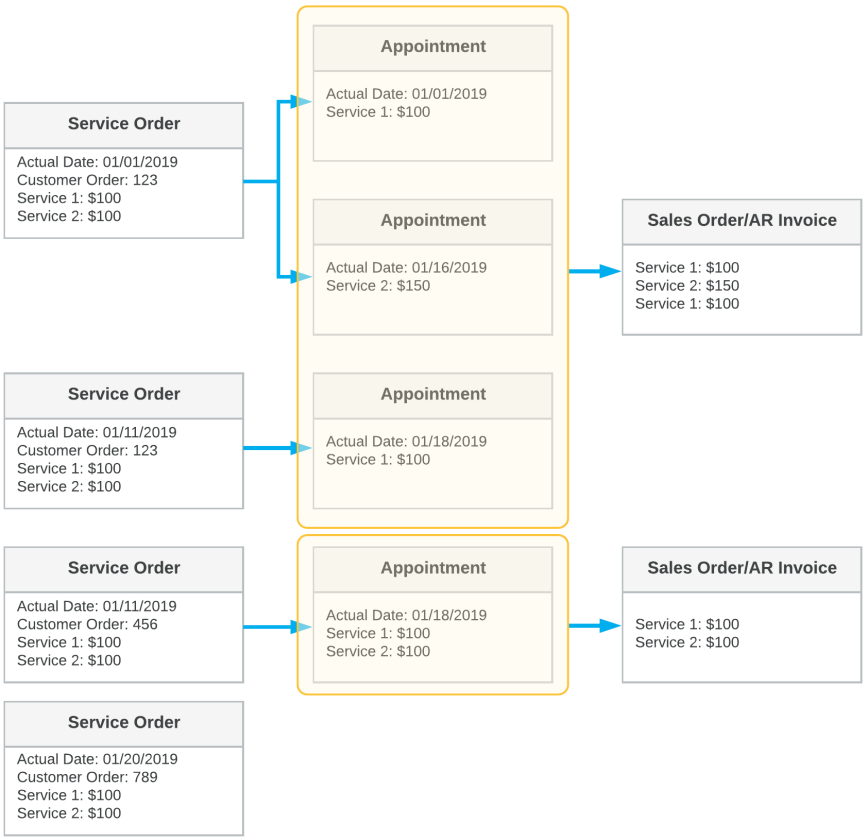


Figure: Generating invoices for appointments and grouping by customer order or external reference

Generating Invoices from Appointments and Grouping by Time Frame

The diagram below demonstrates how the customer billing is performed if the billing cycle assigned to the customer is set to generate billing documents from appointments and group them by time frame (15th of each month).

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

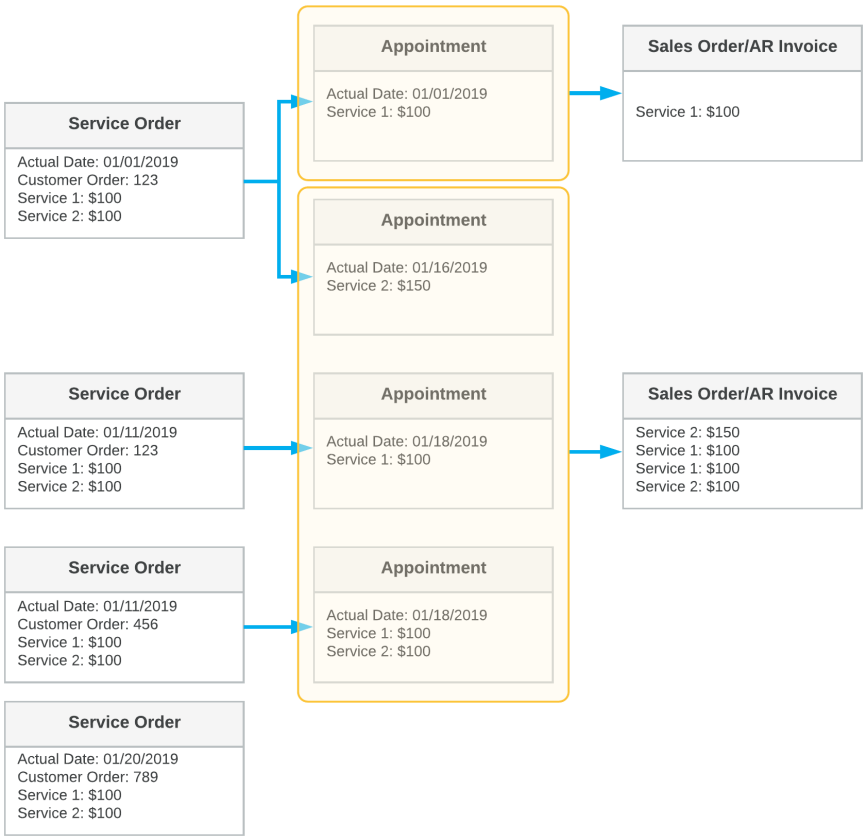


Figure: Generating invoices for appointments and grouping by time frame (15th of each month)

Generating Invoices from Service Orders and Grouping by Service Order

The diagram below demonstrates how the customer billing is performed if the billing cycle assigned to the customer is set to generate billing documents from service orders and group them by service order.

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

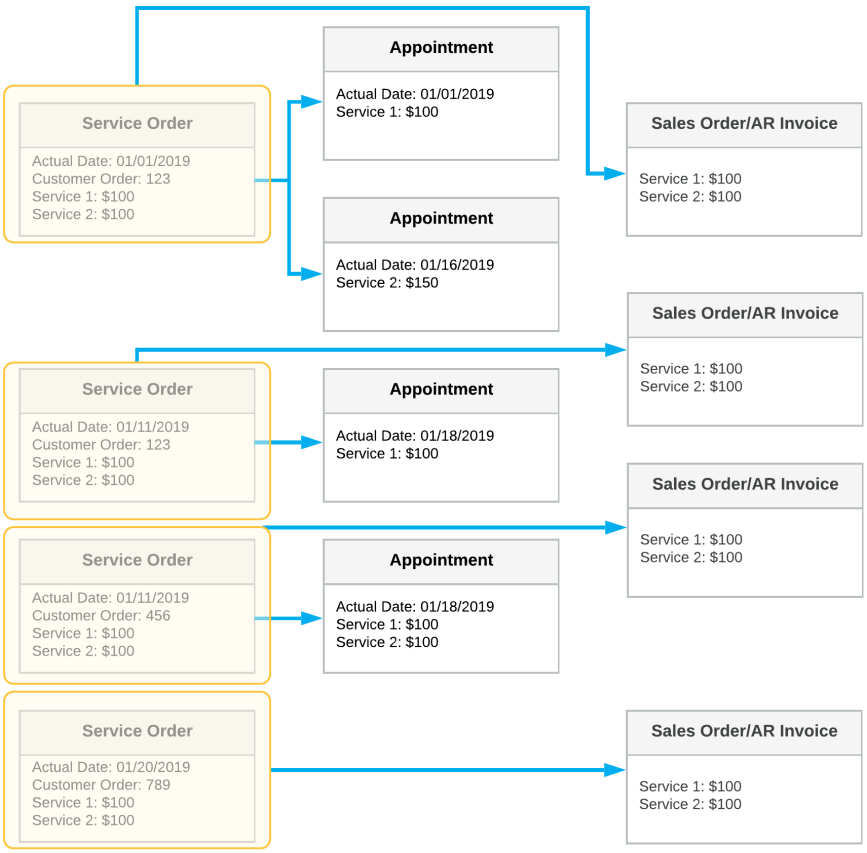


Figure: Generating invoices for service orders and grouping by service order

Generating Invoices from Service Orders and Grouping by Customer Order or External Reference

The diagram below demonstrates how the customer billing is performed if the billing cycles assigned to the customer is set to generate billing documents from service orders and group them by purchase order or customer order.

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

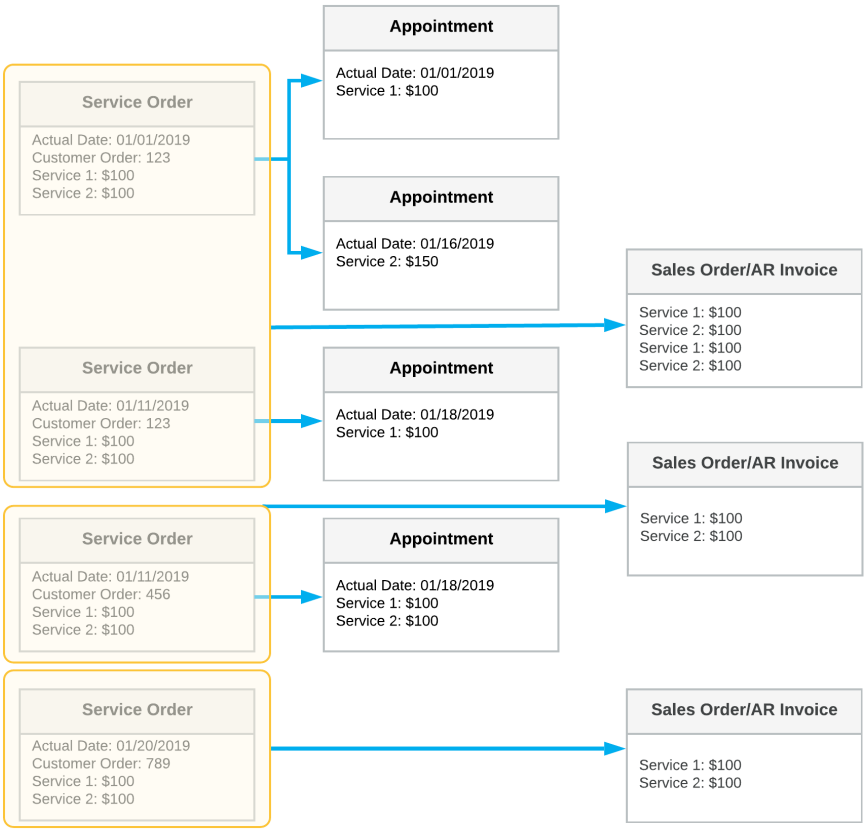


Figure: Generating invoices for service orders and grouping by customer order or external reference

Generating Invoices from Service Orders and Grouping by Time Frame

The diagram below demonstrates how the customer billing is performed if the billing cycles assigned to the customer is set to generate billing documents from service orders and group them by time frame (15th of each month).

In the diagram, you see the details of the service orders (the first column) and appointments (the second column), and the details of the billing documents generated according to the settings of the billing cycle (the third column). Each yellow box reflects the grouping of documents whose information is used in the generated invoices.

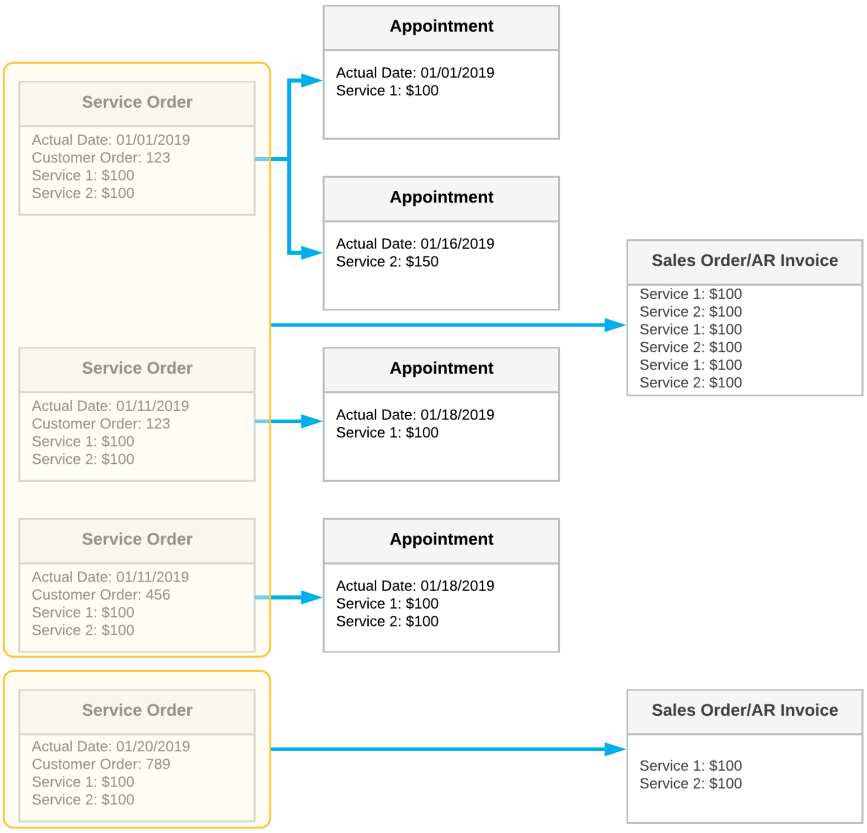


Figure: Generating invoices for service orders and grouping by time frame (15th of each month)

Lesson 8: Generating Billing Documents for Multiple Appointments

In this lesson, you will learn about generating sales orders and invoices for multiple appointments. You will also review invoices generated for customers with different billing cycles assigned.

Story

The accountant of the Sweet Life Equipment company generates invoices every day. On January 28, 2019, the accountant (Yona Jones) has to generate invoices for appointments for the following customers:

- GoodFood One Restaurant

  For this customer, a billing document is generated for each appointment.
- Individual client

  For this customer, a billing document is generated each Monday.
- Thai Food Restaurant

  For this customer, a billing document is generated for all appointments of each service order.

The service orders for all these customers are of a service order type that is defined to generate SO documents, so the accountant also needs to generate these documents. In this lesson, you will act as the accountant and perform the needed actions.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- The *10 Staff Members* pack (under *Service Management*) feature, which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Order Types (SO201000) form, for the *SO* and *IN* order types, the **Enable Field Services Integration** check box is selected for this order type.

The *INST* service order type is assigned to the appointments that will be billed in this lesson. The *INST* service order type has been configured to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section on the Service Order Types (FS202300) form. In the **Order Type for Invoice** box, the *IN* order type has been selected so that processing of sales orders does not require shipments.

On the Customers (AR303000) form, the *GOODFOOD (GoodFood One Restaurant)* customer has been defined, and the *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *AP AP* billing cycle on the Billing Cycles (FS206000) form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Appointments**

Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

The *RETSALE (Individual client)* customer has also been defined on the Customers form, and the *AP_MONDAY* billing cycle has been selected in the **Service Management** section of the **Billing**

Settings tab. The following settings have been specified for the *AP_MONDAY* billing cycle on the Billing Cycles form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Time Frame**
- **Fixed Day of Week**: *Monday*

Based on these billing cycle settings, a separate billing document is generated for all appointments on each Monday. This document presents the details of each service of the appointment.

The *TOMYUM (Thai Food Restaurant)* customer has been defined on the Customers form as well. For this customer, the *AP_SO* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *AP_SO* billing cycle on the Billing Cycles form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Service Orders**

Based on these billing cycle settings, a separate billing document is generated for all appointments of a particular service order. This document presents the details of each service of the appointment.

Process Overview

You generate sales orders for multiple appointments on the Generate Invoices from Appointments (FS500100) form. You can configure the system so that invoices are generated automatically (upon some action) for the created sales orders. You then review the generated documents.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the accountant by using the *jones* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/28/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/28/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. In the company and branch selection menu, on the top pane of the Acumatica ERP screen, make sure the *SWEETEQUIP* branch is selected.

Step 2: Reviewing the Closed Appointments for Customers

Do the following to review the closed appointments for the customers to be billed:

1. Open the Generate Invoices from Appointments (FS500100) form.
2. In the **Generate Invoices In** box, select *Sales Orders*.
3. In the **Up to Date** box, make sure that the *1/28/2019* date is selected.

   In the table, notice that for *GOODFOOD*, two appointments of one service order have been closed on *1/28/2019*. For *RETSALE*, two appointments of one service order have been closed and one appointment of another service order has been closed during the past week. For *TOMYUM*, the last appointment of a service order has been closed on *1/28/2019*. In the **Cut-Off Date** column, you can see the date when the billing document can be generated for each

appointment. This date is computed based on the actual completion date of the appointment, and the billing date based on the customer's billing cycle.

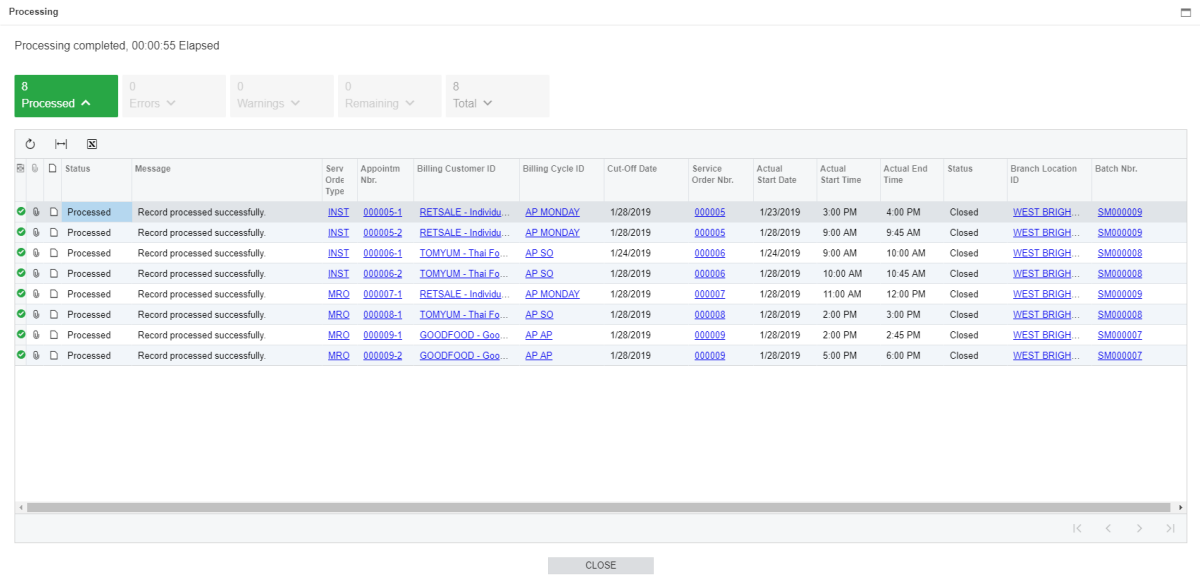
Step 3: Generating and Reviewing Sales Orders and Invoices

To generate multiple sales orders and invoices for the appointments, do the following:

1. On the Generate Invoices from Appointments (FS500100) form, in the **Invoice Actions** section, select the following check boxes:
   a. **Prepare Invoice**
   b. **Release Invoice**
2. On the form toolbar, click **Process All**.

   The system opens the **Processing** pop-up window, in which you can see the status of the process.
3. After the processing has successfully completed, in the **Processing** pop-up window, click **Processed**.

   The table with the processed records is shown in the window. A separate batch with invoices has been generated for each customer, as the following screenshot shows.



Status	Message	Serv Orde Type	Appointm Nbr.	Billing Customer ID	Billing Cycle ID	Cut-Off Date	Service Order Nbr.	Actual Start Date	Actual Start Time	Actual End Time	Status	Branch Location ID	Batch Nbr.
Processed	Record processed successfully.	INST	000005-1	RETSALE - Individu...	AP MONDAY	1/28/2019	000005	1/23/2019	3:00 PM	4:00 PM	Closed	WEST BRIGH...	SM000009
Processed	Record processed successfully.	INST	000005-2	RETSALE - Individu...	AP MONDAY	1/28/2019	000005	1/28/2019	9:00 AM	9:45 AM	Closed	WEST BRIGH...	SM000009
Processed	Record processed successfully.	INST	000006-1	TOMYUM - Thai Fo...	AP SO	1/24/2019	000006	1/24/2019	9:00 AM	10:00 AM	Closed	WEST BRIGH...	SM000008
Processed	Record processed successfully.	INST	000006-2	TOMYUM - Thai Fo...	AP SO	1/28/2019	000006	1/28/2019	10:00 AM	10:45 AM	Closed	WEST BRIGH...	SM000008
Processed	Record processed successfully.	MRO	000007-1	RETSALE - Individu...	AP MONDAY	1/28/2019	000007	1/28/2019	11:00 AM	12:00 PM	Closed	WEST BRIGH...	SM000009
Processed	Record processed successfully.	MRO	000008-1	TOMYUM - Thai Fo...	AP SO	1/28/2019	000008	1/28/2019	2:00 PM	3:00 PM	Closed	WEST BRIGH...	SM000008
Processed	Record processed successfully.	MRO	000009-1	GOODFOOD - Goo...	AP AP	1/28/2019	000009	1/28/2019	2:00 PM	2:45 PM	Closed	WEST BRIGH...	SM000007
Processed	Record processed successfully.	MRO	000009-2	GOODFOOD - Goo...	AP AP	1/28/2019	000009	1/28/2019	5:00 PM	6:00 PM	Closed	WEST BRIGH...	SM000007

Figure: The batches with the generated billing documents

4. In the table, in the **Batch Nbr.** column, click the link for the batch of invoices generated for *GOODFOOD (GoodFood One Restaurant)*.

   The Invoice Generation Batches (FS305800) form opens with the batch of generated sales orders and related invoices. Notice that a separate invoice has been generated for each appointment. This is because the billing cycle of the customer has been defined to generate invoices from appointments and group them by appointments.
5. Close the Invoice Generation Batches form.
6. In the **Processing** pop-up window, in the **Batch Nbr.** column, click the link for the batch of invoices generated for *RETSALE (Individual client)*.

   The Invoice Generation Batches form opens with the batch of generated sales orders and related invoices. Notice that one invoice has been generated for three appointments of two service

orders. This is because the billing cycle of the customer has been defined to generate invoices from appointments and group them by time frame (on each Monday).

7. Close the Invoice Generation Batches form.
8. In the **Processing** pop-up window, in the **Batch Nbr.** column, click the link for the batch of invoices generated for *TOMYUM (Thai Food Restaurant)*.

   The Invoice Generation Batches form opens with the batch of generated sales orders and related invoices. Notice that two invoices has been generated for three appointments. This is because the billing cycle of the customer has been defined to generate invoices from appointments and group them by service orders.
9. Close the Invoice Generation Batches form.

Forms Used

You have used the following forms for completing this lesson:

- *Generate Invoices from Appointments* (FS500100)
- *Invoice Generation Batches* (FS305800)

Self-Test Exercise

With the business date set to January 28, 2019, generate AR invoices for the *COFFEESHOP (FourStar Coffee & Sweets Shop)* customer, whose billing cycle has been defined to generate invoices from service orders. That is, generate invoices for the *000013* service order.

Process Diagrams

The diagrams below demonstrate how the customer billing is performed for the customers that have billing cycles used in this lesson.

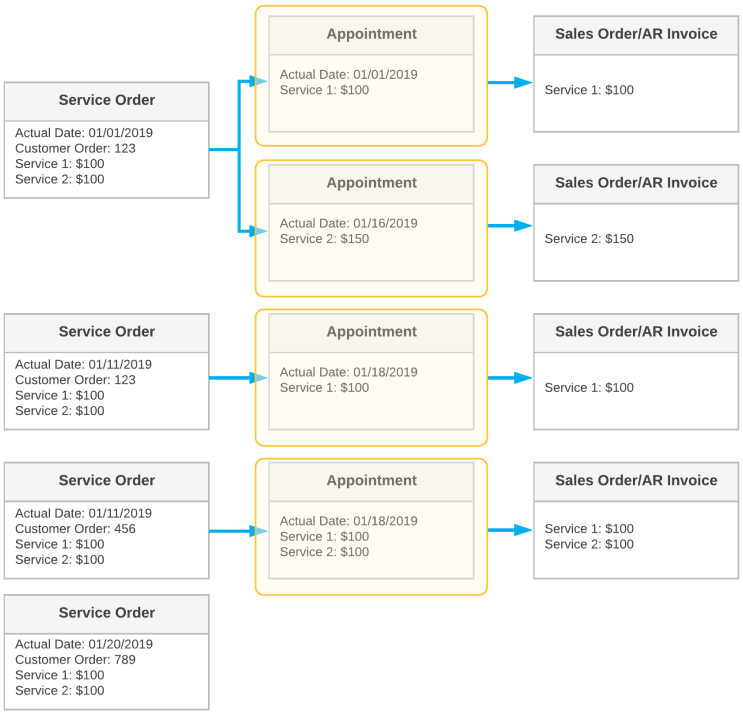


Figure: Generating invoices for appointments and grouping by appointment

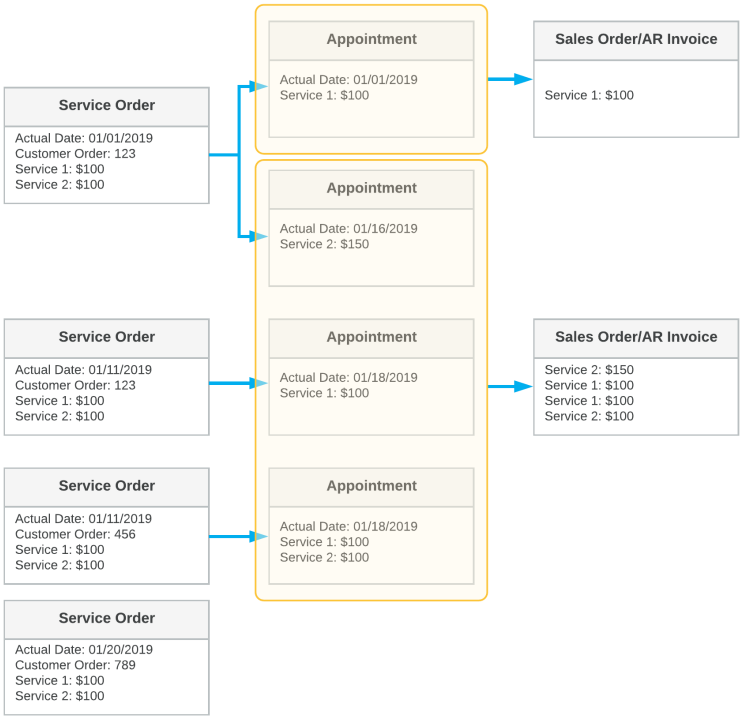


Figure: Generating invoices for appointments and grouping by time frame (each Monday)

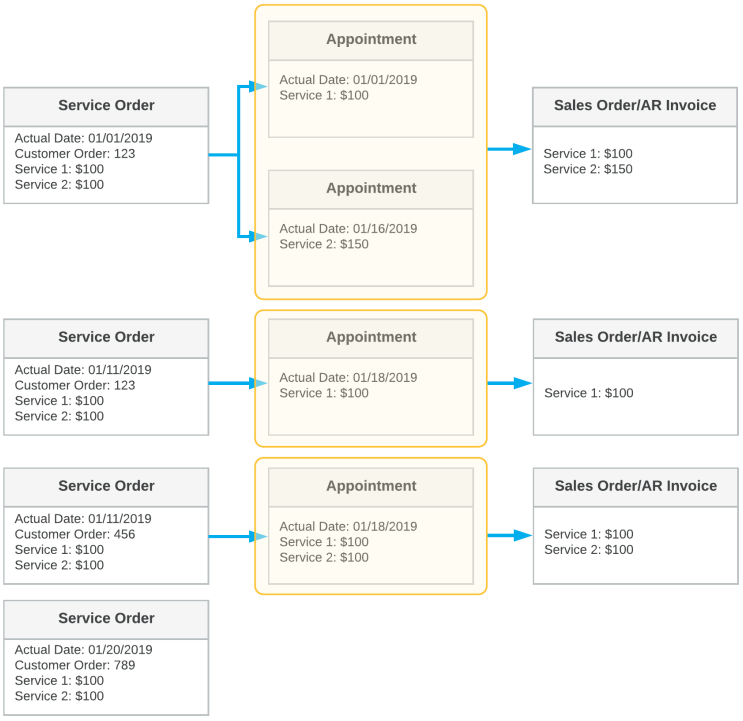


Figure: Generating invoices for appointments and grouping by service order

Recording Staff Times in Time Activities

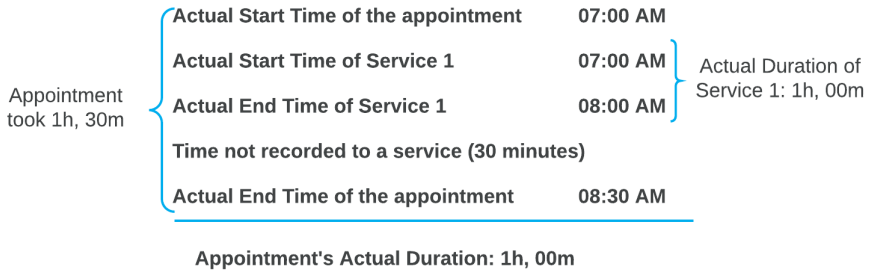
With the *Time Reporting on Activity* feature enabled on the Enable/Disable Features (CS100000) form, activities can be created on the Employee Time Activities form (EP307000) for each employee involved in an appointment when the appointment has been completed.

Appointments are created and the applicable times are recorded on the Appointments (FS300200) form. If a staff member works during the entire appointment, the appointment time is recorded in the employee's time activity. If a staff member works during a part of appointment, the actual staff time is recorded in the employee's time activity. If a staff member performs only particular services of the appointment, the service time is recorded in the employee's time activity.

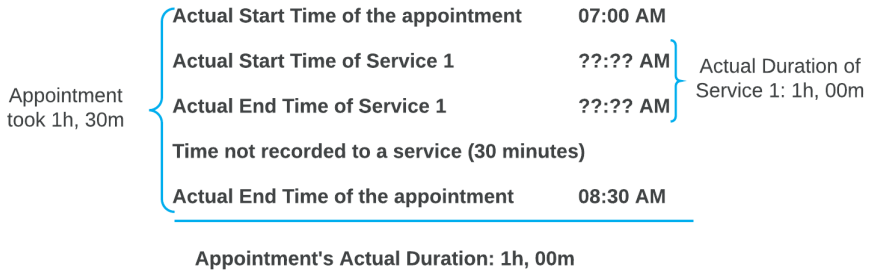
Calculation of the Appointment Time in the System

Service personnel enter and work with on the Appointments (FS300200) form. When the system calculates the actual duration of an appointment (in the **Actual Duration** box of the Summary area of this form), the system sums up the duration of the services included in the appointment. The system does not include in the actual duration of the appointment the time that has not been recorded to any service.

Suppose that you have attended an appointment that lasted an hour and a half, but you have spent only one hour on service delivery. Further suppose that in the system, you specify the start and end times of the service and the start and end times of the appointment. The system calculates the appointment's actual duration as one hour (see below).



Suppose that you have attended an appointment that lasted an hour and a half, but you have spent only one hour on service delivery. Further suppose that in the system, you specify the actual duration of the service (one hour) and the start and end time of the appointment. The system calculates the appointment's actual duration as one hour (see below).



Suppose that you have attended an appointment that lasted an hour and a half. You and your colleague delivered different services at the same time (Service 1 and Service 2, respectively) and each spent one hour on service delivery. In the system, you specify the start and end time of each service as well as the start and end time of the appointment. The system calculates the actual duration of the

appointment as two hours (the total of the times of Service 1 and Service 2), even though the services were performed in the same hour (see below).

Recording of Staff Time for the Entire Appointment

If a staff member is working during the entire duration of an appointment, to record the working time, the staff member has to be assigned to the appointment but not associated with any particular service of this appointment. That is, in the row for the appointment staff member on the **Staff** tab of the Appointments (FS300200) form, the **Service Line Ref** and **Service ID** columns are empty.

Recording of Staff Time for a Part of the Appointment

If a staff member is working on the appointment only during a specific part of an appointment but not during the entire appointment, to correctly track the staff time, you assign the applicable staff member to the appointment and do not associate the person with any service. That is, on the Appointments (FS300200) form, you assign the necessary staff members to the appointment on the **Staff** tab and leave the **Service ID** column empty for these staff members.

In this case, on the Appointments form, he or she enters the time when the staff member has started to work on the appointment and the time when the staff member has ended or the actual time he or she has worked. That is, the staff member fills in the **Actual Start Time** and **Actual End Time** boxes or **Actual Duration** box on the **Staff** tab of the form.

Recording of Staff Time Performing Services

If a staff member is working on an appointment during only particular services (or one service) but not during all services, to correctly track the staff member's time, you associate the staff member with the services he or she is performing on the Appointments (FS300200) form. You can assign a staff member to a service line in the following ways:

- If the service is performed by only one staff member, by selecting this staff member in the **Staff Member ID** column of the service line on the **Services** tab
- By clicking the service line, clicking the **Staff Selector** button on the **Services** tab, and selecting the staff member in the **Staff Selector** dialog box
- By clicking the **Staff Selector** button on the **Staff** tab, selecting a service line in the **Service Line Ref.** box, and selecting the staff member in the **Staff Selector** dialog box
- By selecting the service line reference number in the **Service Line Ref.** column on the **Staff** tab for the staff member

During the appointment, on the **Services** tab of the Appointments form, staff members should enter the actual times of particular services.

Lesson 9: Recording the Appointment Staff Time

In this lesson, you will learn about recording in the system the time that staff members spend at an appointment. That is, you will learn about how to record the time if the staff member works during the whole appointment.

Story

Suppose that Sweet Life Equipment management has decided to track the time activities of its employees, thus requiring the staff members visiting customers to enter the actual start and end times of each appointment. For the GoodFood One Restaurant customer, Sweet Life Equipment attends regular appointments to deliver training services. Only one staff member attends these appointments, and this staff member works during the whole appointment. Thus, the time activity should be created for the whole duration of the appointment. Acting as a staff member (Todd Bloom), you will record the start and completion of the appointment, and then review the time activity that has been created for the appointment.

Configuration Overview

For the purposes of this portion of the lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *Time Reporting on Activity*, which provides the ability to track employees' time activities in the system
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Service Management Preferences (FS100100) form, the **Enable Time & Expenses Integration** check box has been selected in the **Integrating with Time & Expenses** section.

On the Service Order Types (FS202300) form, for the *TRN* service order type, the following settings have been specified in the **Integrating with Time & Expenses** section:

- **Require Time Approval to Close Appointments**: Cleared
- **Automatically Create Time Activities from Appointments**: Selected
- **Default Earning Type**: *RG*

The **Staff Member in Service Management** check box has been selected for *EP00000002 (Todd Bloom)* on the Employees (EP203000) form, so you can assign this employee to perform services.

Process Overview

To register the staff time of an appointment, with the appropriate configuration settings specified for these capabilities, you complete the appointment on the Appointments (FS300200) form, specifying the actual start and end times. You can then review the time activity created in the system on the Employee Time Activities (EP307000) form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the staff member by using the *bloom* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Attending an Appointment

To attend an already-existing appointment and process it through completion, do the following:

1. Open the Appointments (FS300200) form.
2. In the **Appointment Nbr.** box, select *000010-1*.
3. On the **Staff** tab, add a row and then select *EP00000002 (Todd Bloom)*.
4. Save the changes.
5. On the form toolbar, click **Actions** > **Start Appointment**.
6. On the **Settings** tab, in the **Actual Date and Time** section, set the **Actual Start Time** to *12:00 PM*.
7. Set the **Actual End Time** to *1:00 PM*.
8. Select the **Finished** check box.
9. On the form toolbar, click **Actions** > **Complete Appointment**.

Step 3: Reviewing Time Activities

You review the time activity that has been created for the appointment as follows:

1. Open the Employee Time Activities (EP307000) form, and in the **Employee** box, make sure *Todd Bloom* is selected.
2. In the table, review the time activity record for the *000010-1* appointment.

   Notice that the **Time** value corresponds to the **Actual Start Time** of the appointment, and the **Time Spent** value (of two hours) corresponds to the difference between the appointment's **Actual Start Time** and **Actual End Time**.
3. Verify that the **Service** column is empty, meaning that this employee is not associated with any particular service of the appointment.

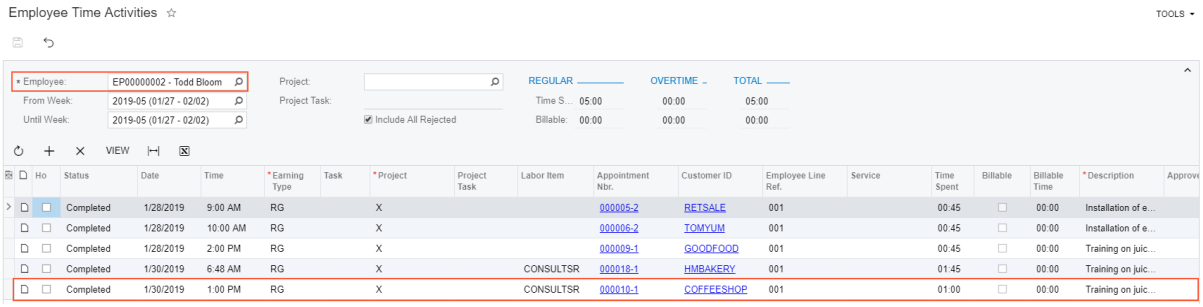


Figure: Time activities of Todd Bloom

Forms Used

You have used the following forms for completing this portion of the lesson:

- *Appointments* (FS300200)
- *Employee Time Activities* (EP307000)

Lesson 10: Recording the Staff Time Spent on Services

In this lesson, you will learn about recording in the system the staff time spent on services. That is, you will learn about how to register the time if each staff member performs a particular service during an appointment.

Story

Suppose that Sweet Life Equipment management has decided to track the time activities of its employees, thus requiring the staff members visiting customers to enter the actual start and end times of each appointment. For the HM's Bakery and Cafe customer, the service manager of Sweet Life Equipment has already entered an appointment to provide installation and training services. Each service is performed by a different staff member, you will assign the staff members accordingly. You will then act as a staff member attending the appointment, specifying the starting and ending times for each service. Finally, you will review the time activities that have been created for the staff members.

Configuration Overview

For the steps to be completed below, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *Time Reporting on Activity*, which provides the ability to track employees' time activities in the system
- The *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Service Management Preferences (FS100100) form, the **Enable Time & Expenses Integration** check box has been selected in the **Integrating with Time & Expenses** section.

On the Service Order Types (FS202300) form, for the *TRN* and *INST* service order types, the following settings have been specified in the **Integrating with Time & Expenses** section:

- **Require Time Approval to Close Appointments**: Cleared
- **Automatically Create Time Activities from Appointments**: Selected
- **Default Earning Type**: *RG*

The **Staff Member in Service Management** check box has been selected for *EP00000002 (Todd Bloom)* and *EP00000003 (Jon Waite)* on the Employees (EP203000) form, so you can assign these employees to perform services.

Process Overview

To register the time of a staff member, you complete the appointment, specifying the times for the particular staff member on the Appointments (FS300200) form. You can then review the time activity created for the staff member in the system on the Employee Time Activities (EP307000) form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the staff member by using the *waite* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *2/1/2019*. If a different date is displayed, click the Business Date menu button, and select the *2/1/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Assigning Staff Members to an Appointment

To assign multiple staff members to an existing appointment for which staff member time will be tracked, do the following:

1. Open the Appointments (FS300200) form.
2. In the **Appointment Nbr.** box, select *000012-1*.
3. On the **Services** tab, assign *EP00000003 (Jon Waite)* to the *INSTALL* service by selecting him in the **Staff Member ID** column for that row.
4. On the **Staff** tab, make sure *Jon Waite* is listed.
5. Click the **Add Row** button, and specify the following settings in the added row:
   - **Staff Member**: *EP00000002 (Todd Bloom)*
   - **Service Line Ref.**: *0002* (*TRAINING*)

     This is the line reference number of the *TRAINING* service to which the staff member is assigned.
6. Save your changes.

Step 3: Attending the Appointment

To attend the appointment and process it, do the following:

1. On the form toolbar, click **Actions** > **Start Appointment**.
2. On the **Settings** tab, in the **Actual Date and Time** section, set the **Actual Start Time** to 9:00 AM.
3. Set the **Actual End Time** to 11:00 AM.
4. On the **Staff** tab, specify the following actual starting and ending times in the corresponding lines:
   - *INSTALL*—from 9:00 AM until 10:00 AM
   - *TRAINING*—from 9:30 AM until 10:45 AM
5. Save your changes.
6. On the **Settings** tab, in the **Actual Date and Time** section, select the **Finished** check box.
7. On the form toolbar, click **Actions** > **Complete Appointment**.

Step 4: Reviewing Time Activities

You review the time activities that have been created for the appointment as follows:

1. Open the Employee Time Activities (EP307000) form, and in the **Employee** box, select *Jon Waite*.

2. In the table, review the record for the *000012-1* appointment, and make sure that he has a time activity for the *INSTALL* service: one hour spent, starting at 9:00 AM, as the following screenshot shows.

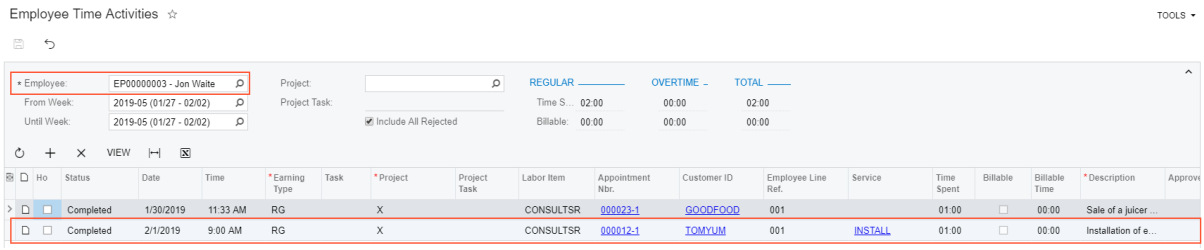


Figure: Time activities of Jon Waite

3. In the **Employee** box, select *Todd Bloom*.

4. In the table, review the record for the *000012-1* appointment, and make sure that he has a time activity for the *TRAINING* service: one hour and fifteen minutes spent, starting at 9:30 AM.

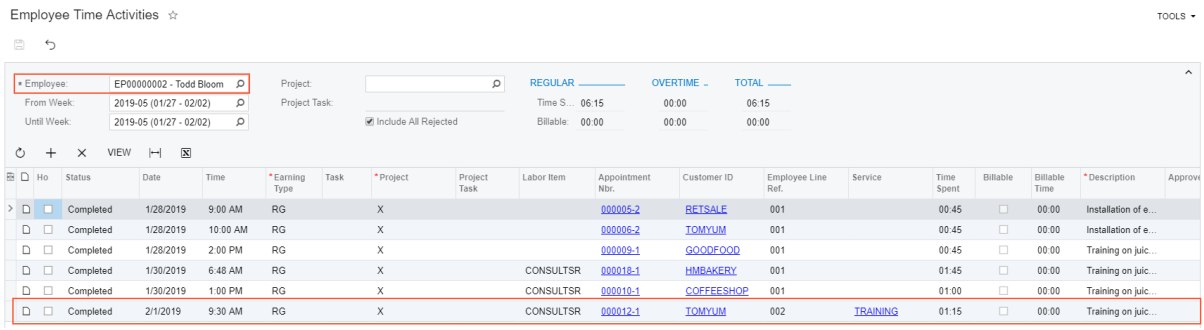


Figure: Time activities of Todd Bloom

Forms Used

You have used the following forms for completing this portion of the lesson:

- *Appointments* (FS300200)
- *Employee Time Activities* (EP307000)

Self-Test Exercise

Correct the *000012-1* appointment so that *Jon Waite* also participated in first half of the training. To do so, assign *Jon Waite* to perform the *TRAINING* service in a new row of the **Staff** tab. For this row, set the **Actual Start Time** to 09:00 AM and the **Actual End Time** to 09:30 AM. Review *Jon Waite* time activity records on the Employee Time Activities (EP307000) form. He should have two activities for the appointment.

Lesson 11: Quickly Processing a Service Order

In this portion of the lesson, you will learn how to process service orders with just one click if quick processing has been configured for the applicable service order type (the one specified for the service order).

You can quickly process a service order if the billing cycle assigned to the selected customer has been configured to generate invoices from service orders—that is, if the **Service Orders** option button is selected under **Generate Invoices From** on the Billing Cycles (FS206000) form for the billing cycle.

Story

Suppose that the Sweet Life Equipment company receives a call from the FourStar Coffee & Sweets Shop customer about a needed repair of one of the orange juice machines. Acting as the service manager (Pam Brawner), you will enter the service order into the system and quickly process it. The quick processing initiates the allowing of generation of billing documents for the service order and the generation of a sales order and the related invoice for it. Because the customer requested that you send the invoice by email, you will also include the sending of the released invoice to the customer in this processing.

Configuration Overview

Various settings have been preconfigured to give you the ability to easily perform the processing described below. The following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which that provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Service Order Types (FS202300) form, the *MRO* service order type has been configured with the following settings:

- On the **Preferences** tab:
  - **Generate Invoices In**: **Sales Orders**
  - **Allow Quick Process**: Selected
- On the **Quick Process** tab:
  - **Allow Invoice** (**Service Order Actions** section): Selected

    This check box is read-only and always selected to notify you that the allowing of the generation of billing documents for the service order is going to be performed during the quick processing of service orders of the type.
  - **Complete Order** (**Service Order Actions**): Cleared
  - **Close Order** (**Service Order Actions**): Cleared
  - **Generate Invoice** (**Service Order Actions**): Selected
  - **Prepare Invoice** (**Sales Order Actions**): Selected
  - **Email Sales Order/Quote** (**Sales Order Actions** section): Cleared
  - **Release Invoice** (**Invoice Actions**): Selected
  - **Email Invoice** (**Invoice Actions** section): Cleared

On the Customers (AR303000) form, the *COFFEESHOP (FourStar Coffee & Sweets Shop)* customer has been defined, and the *SO SO* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *SO SO* billing cycle on the Billing Cycles (FS206000) form:

- **Generate Invoices From**: **Service Orders**
- **Group Invoices By**: **Service Orders**

Process Overview

To quickly process a service order, you create a new service order on the Service Orders (FS300100) form and initiate the quick processing of the service order by the system. You can also change some settings of the quick processing. You then review the documents generated as the result of quick processing.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Entering a Service Order

To create the service order that will be processed quickly, do the following:

1. Open the Service Orders (FS300100) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
   - **Service Order Type**: *MRO*

     Quick processing settings have been defined for the *MRO* service order type, as described in the Configuration Overview section.
   - **Customer**: *COFFEESHOP (FourStar Coffee & Sweets Shop)*
3. On the table toolbar of the **Services** tab, click **Add Row**; in the **Inventory ID** column of the row, select *REPAIR*.
4. On the form toolbar, click **Save** to save the order.

Step 3: Quick Processing of the Service Order

To quickly process the service order, do the following:

1. While still viewing the appointment on the Service Orders (FS300100) form, on the form toolbar, click **Quick Process**.

   The **Process Service Order** dialog box opens.
2. In the dialog box, select the **Email Invoices** check box.

3. Click **OK**.

   The system closes the **Process Service Order** dialog box and opens the **Processing Results** dialog box, in which you can see the status of the process (see the screenshot below).

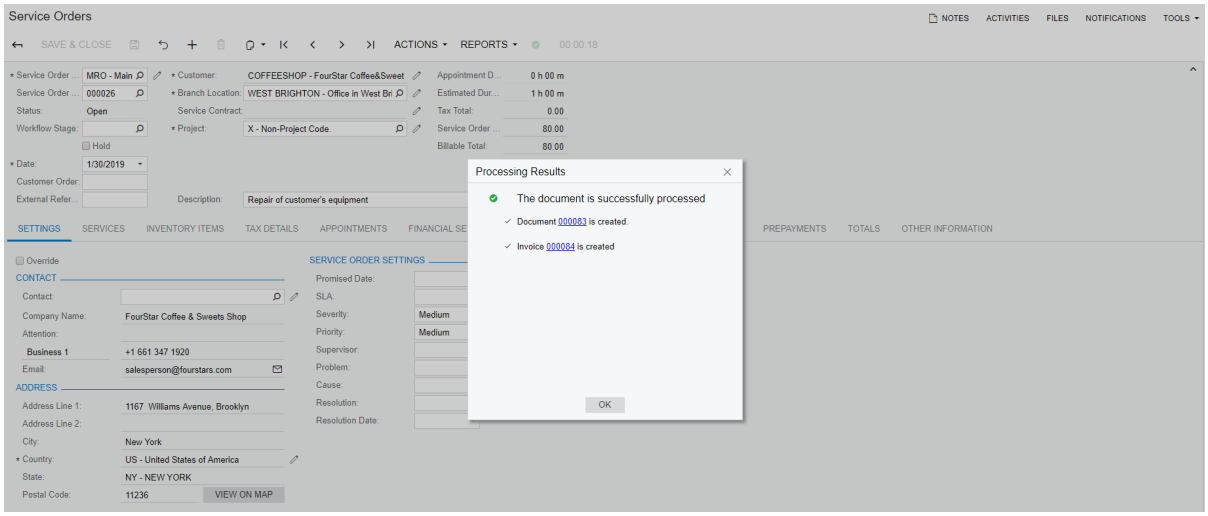


Figure: The status of the service order processing

4. After the processing has successfully completed, close the **Processing Results** dialog box.

   Based on the settings specified for the *MRO* service order type (and the setting you changed to have the invoice sent to the customer), during the quick processing, the system allows the generation of billing documents for the service order, creates a sales order for the service order, creates a related invoice and releases it, and sends the invoice to the customer by email.

Step 4: Reviewing the Created Documents and the Sent Email

Review the documents that have been generated and the email that has been sent as follows:

1. While still viewing the appointment on the Service Orders (FS300100) form, on the **Invoice Info** tab, notice that the **Document Nbr.** and **Invoice Nbr.** columns are filled in, indicating that the sales order and invoice, respectively, have been created.
2. In the **Invoice Nbr.** column, click the link to open the invoice.

   The Invoices (SO30300) form opens. Note that the invoice has the *Open* status.
3. Open the Outgoing (CO409020) form, and review the email sent to the customer with the invoice.
4. Click the email sent to the customer with the invoice; this brings up the email in a pop-up window, so you can review it.

Forms Used

You have used the following forms for completing this portion of the lesson:

- *Invoices* (SO303000)
- *Service Orders* (FS300100)
- *Outgoing* (CO409020)

Lesson 12: Processing Prepayments for a Service Order

In this lesson, you will learn how to process prepayments that have been made for a service order, including entering a prepayment by a staff member when attending an appointment. You will go through the whole process, starting from the creation of a service order and ending with the release of the invoice for service order.

Story

Suppose that the GoodFood One Restaurant customer has contacted the service manager of the Sweet Life Equipment company (Pam Brawner) to request installation services and a juicer. You will enter this service order for it into the system, and create and schedule the related appointment. The customer has paid in advance 20% of the service order total when requesting the services and item, and will prepay an additional 30% during the appointment. You will enter the prepayments at the appropriate times, process the appointment, and generate the billing documents.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *INST* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab).

On the Customers (AR303000) form, the *GOODFOOD (GoodFood One Restaurant)* customer has been defined, and the *AP AP* billing cycle has been selected in the **Service Management** section of the **Billing Settings** tab. The following settings have been specified for the *AP AP* billing cycle on the Billing Cycles (FS206000) form:

- **Generate Invoices From**: **Appointments**
- **Group Invoices By**: **Appointments**

Based on these billing cycle settings, a separate billing document is generated for each appointment; this document presents the details of each service of the appointment.

The *10200EQ (Equipment Checking)* cash account is assigned to the *SWEETEQUIP* branch on the Cash Accounts (CA202000) form.

Process Overview

You can process prepayments that occur prior to the appointment and during the appointment. You create a service order on the Service Orders (FS300100) form, add the service to be performed for the order, enter a prepayment for the service order (to reflect the initial prepayment), and create the related appointment on the Appointments (FS300200) form. You then process the appointment, including entering the second prepayment. Finally, you generate and process a sales order to bill the customer.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Entering a Service Order

Create the service order for the GoodFood One Restaurant as follows:

1. Open the Service Orders (FS300100) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
   - **Service Order Type**: *INST*
   - **Customer**: *GOODFOOD (GoodFood One Restaurant)*
3. On the table toolbar of the **Services** tab, click **Add Row**; in the **Inventory ID** column of the row, select *INSTALL*.
4. On the table toolbar of the **Inventory Items** tab, click **Add Row**; in the **Inventory ID** column of the row, select *JUICER20C*.
5. Click **Save** on the form toolbar.

Step 3: Entering a Prepayment for the Service Order

To create a prepayment for the service order, do the following:

1. On the **Prepayments** tab of the Service Orders (FS300100) form, click **Create Prepayment**.

   The Payments and Applications (AR302000) form opens in a separate window.
2. In the **Cash Account** box, select *10200EQ (Equipment Checking)*.
3. In the **Payment Amount** box, type `820` (20% of the total amount).
4. On the **Service Orders to Apply** tab, note that the service order you created is assigned to the prepayment.
5. In the Summary area, clear the **On Hold** check box.
6. On the form toolbar, click **Save** and then **Release**.
7. Close the window.

   The prepayment you have created is now listed on the **Prepayments** tab of the Service Orders form.

Step 4: Creating an Appointment

To create an appointment, do the following:

1. On the form toolbar of the Service Orders (FS300100) form, click **Actions** > **Schedule Appointment**.

The system opens the Appointments (FS300200) form with the settings that have been specified in the service order.

2. On the **Settings** tab, specify the following settings:
   - **Scheduled Date**: *2/1/2019*
   - **Scheduled Start Time**: *12:00 PM*
3. On the **Staff** tab, assign the staff member to perform the service as follows:
   a. On the table toolbar, click **Add Row**.
   b. In the **Staff Member** column of the row, select *Alberto Jimenez*.
4. On the form toolbar, click **Save**.

Step 5: Processing the Appointment with the Prepayment

Now you will process the appointment on behalf of Alberto Jimenez. Process the appointment as follows:

1. On the Appointments (FS300200) form toolbar, click **Actions** > **Start Appointment**.
2. On the **Prepayments** tab of the Appointments form, click **Create Prepayment**.

   The Payments and Applications (AR302000) form opens in a separate window.
3. In the **Cash Account** box, select *10200EQ (Equipment Checking)*.
4. In the **Payment Amount** box, type `1230` (30% of total amount).
5. On the **Service Orders to Apply** tab, note that the created service order is assigned to the prepayment.
6. In the Summary area, clear the **On Hold** check box.
7. On the form toolbar, click **Save** and then **Release**.
8. Close the window.
9. On the **Settings** tab, in the **Actual Date and Time** section, select the **Finished** check box.
10. On the form toolbar, click **Actions** > **Complete Appointment**.
11. On the form toolbar, click **Actions** > **Close Appointment**.

Step 6: Generating Billing Documents

Now you will process the appointment on behalf of an accountant through the generation of the billing documents. Do the following:

1. Open the Generate Invoices from Appointments (FS500100) form.
2. In the **Generate Invoices In** box, select *Sales Orders*.
3. In the **Up to Date** box, make sure that the *2/1/2019* date is selected.
4. In the table, select the unlabeled check box for the appointment you have closed for *GOODFOOD (GoodFood One Restaurant)* on *2/1/2019*.
5. On the form toolbar, click **Process**.

   The system opens the **Processing** pop-up window, in which you can see the status of the process.
6. After the processing has successfully completed, in the **Processing** pop-up window, click **Processed**.

The system displays the processed record in the table.

7. In the table, in the **Batch Nbr.** column, click the link for the generated batch.

The Invoice Generation Batches (FS305800) form opens with the batch with the generated sales order.

8. In the **Document Nbr.** box, click the link.

The Sales Orders (SO301000) form opens with the generated sales order.

9. On the **Payments** tab, note that both prepayments are listed.

10. On the form toolbar, click **Actions > Prepare Invoice**.

The Invoices (SO303000) form opens in a separate window.

11. On the **Payment Information** tab, verify that the payment total is 50% of total amount, as the following screenshot shows.

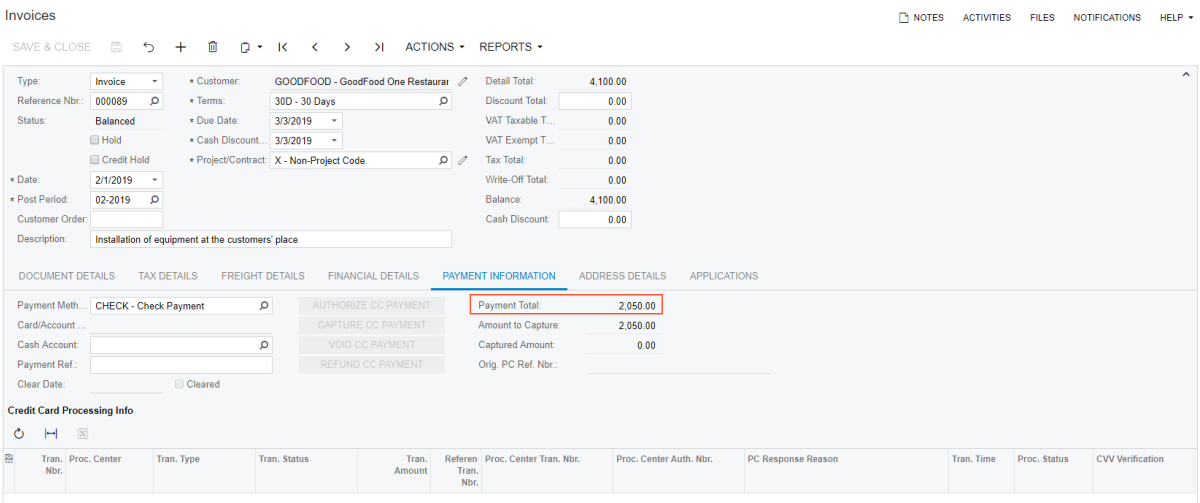


Figure: The prepaid invoice

Forms Used

You have used the following forms for completing this lesson:

- *Appointments* (FS300200)
- *Invoices* (SO303000)
- *Payments and Applications* (AR302000)
- *Sales Orders* (SO301000)
- *Service Orders* (FS300100)

Process Diagram

In the diagram below, you can see the general workflow of processing the service order with prepayments.

Processes and job titles may be different in your company.

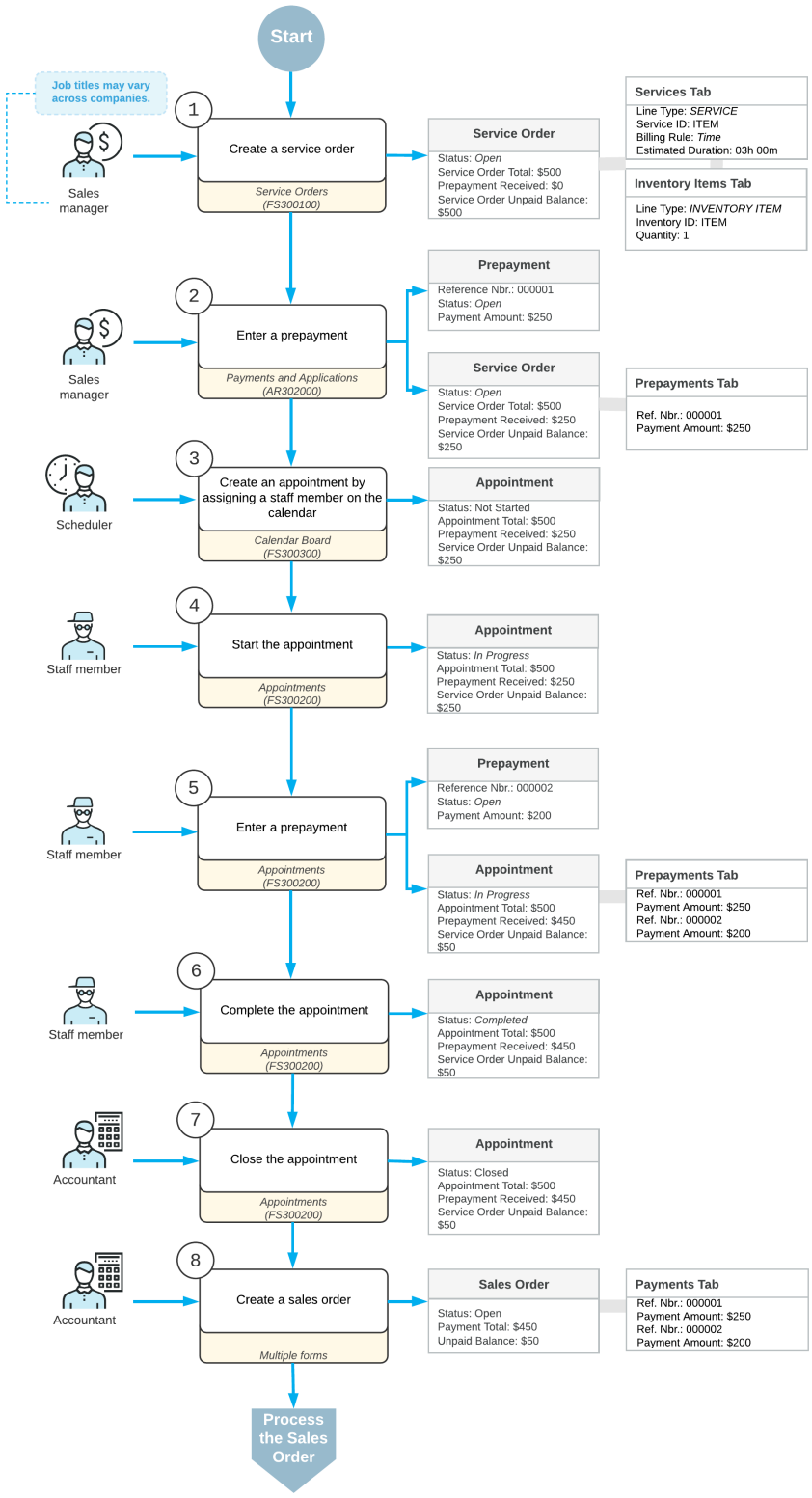


Figure: Processing a service order with prepayments

Lesson 13: Processing Service Orders with Items to Be Purchased

In this lesson, you will go through the process of creating a service order for which a stock item must be purchased from a vendor. You will also learn how to process a purchase order and service order (up to but not including the creation of appointments).

Story

Suppose that the Sweet Life Equipment company has announced that it will begin selling a new juicer (*JUICER05*). The FourStar Coffee & Sweets Shop customer would like to order this juicer along with training services. Sweet Life Equipment will purchase the juicer from the *SQUEEZO* vendor. When the juicer is received, an appointment for services can be created. Acting as the service manager (Pam Brawner), you will create the service order, create the purchase order, and process the purchase order.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *INST* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab).

On the Non-Stock Items (IN202000) form, for the *INSTALL* non-stock item, the *Service* type has been selected.

Process Overview

To process a service order with items to be purchased, on the Service Orders (FS300100) form, you create a service order and specify each item that has to be purchased. You then create a purchase order and process it in the system.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Creating a Service Order with an Item to Be Purchased

To create a service order whose items need to be purchased from a vendor, do the following:

1. On the Service Orders (FS300100) form, create a service order, and specify the following settings in the Summary area:
   - **Service Order Type**: *INST*
   - **Customer ID**: *COFFEESHOP (FourStar Coffee & Sweets Shop)*
2. On the table toolbar of the **Services** tab, click the **Add Row** button, and add the *INSTALL* service to this service order.
3. On the table toolbar of the **Inventory Items** tab, click the **Add Row** button, and add the *JUICER05* stock item to the service order.

   In the table footer, notice that the juicer is not available at the warehouse.
4. Save your changes.
5. On the **Inventory Items** tab, select the **Mark for PO** check box for *JUICER05*.

   Now a purchase order can be created from the service order and the purchase order will contain this stock item.
6. In the **Vendor ID** column, select *SQUEEZO*.

   The item that is designated for purchase will be purchased from this vendor.
7. Save your changes.

Step 3: Creating a Purchase Order

To create a purchase order, perform the following steps:

1. While still viewing the service order on the Service Orders (FS300100) form, on the form toolbar, click **Actions > Create Purchase Order**.

   The Create Purchase Orders (PO505000) form opens with the service order type and service order number selected, and the table shows one row with the item to be purchased.
2. For the row in the table, verify the vendor in the **Vendor** column.
3. Select the unlabeled check box in the row of the inventory item, and click **Process** on the form toolbar.

   After the processing has successfully completed, the Purchase Orders (PO301000) form opens with the purchase order you have created.

Step 4: Processing the Purchase Order

Now you will process the appointment on behalf of the purchase manager. To process the purchase order, do the following:

1. On the Purchase Orders (PO301000) form, open the purchase order that you created in the previous step.
2. In the Summary area, clear the **On Hold** check box.
3. On the form toolbar, click **Actions > Enter PO Receipt**.

   The Purchase Receipts (PO302000) form opens with a new receipt that has settings copied from the purchase order.
4. In the Summary area, select the **Create Bill** check box.
5. Save the receipt.

The receipt has been created for the purchased item.

6. On the form toolbar, click **Release**, and close the window with the receipt.

   The receipt has been released, indicating that the ordered inventory item is at the warehouse.

Reviewing the Service Order with the Purchased Item

To review the service order, do the following:

1. Open the Service Order Details (FS401000) form, and in the **Customer** box, select the *COFFEESHOP (FourStar Coffee & Sweets Shop)* customer.

   Review the list of service order items. In the **PO Status** column, notice that the status of the purchase order is *Closed*. This indicates that the stock item has been received at the warehouse.

2. In the **Service Order Nbr.** box, click the link of the service order you created with the purchased item.

   The Service Order (FS300100) form opens with the service order.

3. On the table toolbar of the **Inventory Items** tab, click the **Allocations** button.

   In the **Allocations** dialog box, which has been opened, notice that the **Allocated** check box is selected for the inventory item, indicating that the purchased item is reserved for the service order, as the following screenshot shows.

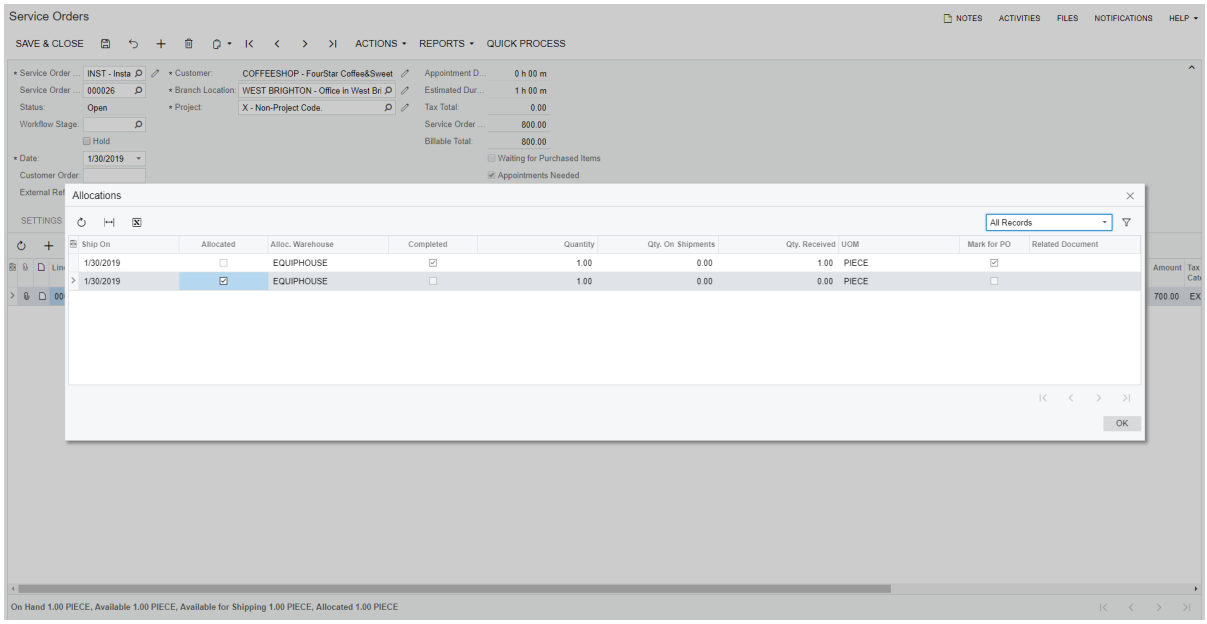


Figure: The allocated item

Forms Used

You have used the following forms for completing this lesson:

- *Create Purchase Orders* (PO505000)
- *Purchase Orders* (PO301000)
- *Purchase Receipts* (PO302000)
- *Service Order Details* (FS401000)
- *Service Orders* (FS300100)

Process Diagram

In the diagram below, you can see the entire workflow of processing the service order and the related purchase order.

Processes and job titles may be different in your company.

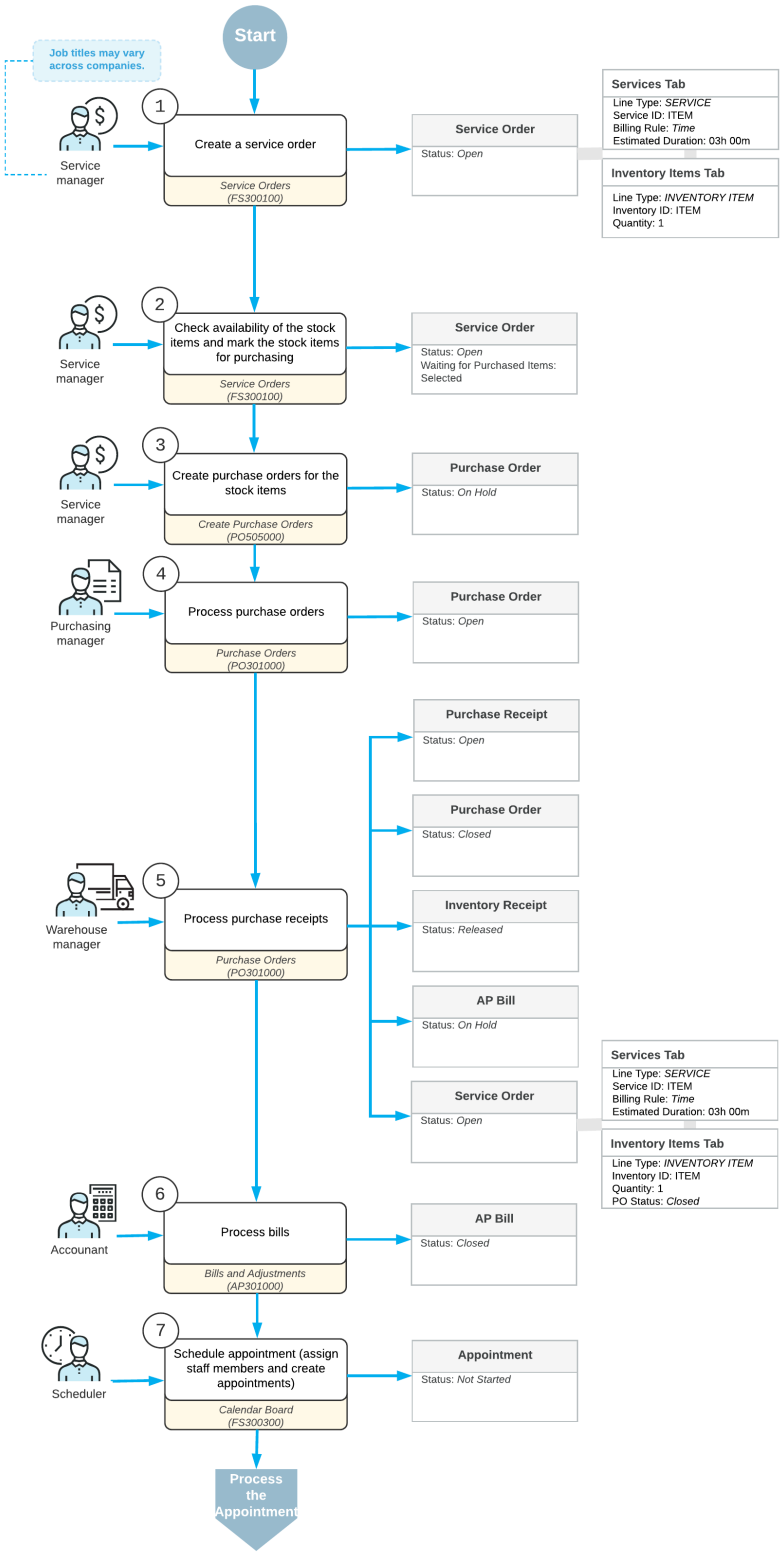


Figure: Purchase order processing along with service order processing

Lesson 14: Using Resource Equipment

You will learn how to assign to appointments equipment that is necessary for performing services—that is, resource equipment that your company owns.

Story

Suppose that the Sweet Life Equipment company has its own equipment that is used for repair services and keeps a history of appointments for each item that was used. The service manager (Pam Brawner) receives a call from the FourStar Coffee & Sweets Shop customer that the repair of a juicer is necessary on February, 4, 2019. When the service manager schedules the appointment, she takes into consideration which piece of resource equipment can be used during the time of the appointment. She also tracks the history of usage of the selected piece of resource equipment.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

On the Branch Locations (FS202500) form, the *WEST BRIGHTON* branch location has been configured. This branch location has been assigned as a default branch location to the *brawner* user on the User Profile (SM203010) form.

The *MRO* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab).

On the Equipment Types (FS200800) form, the *SCREWDRIVER* equipment type has been created. This type has been assigned to the *FSE00001 (Vissko Screwdriver Set)* equipment on the Equipment (FS208000) form.

On the Non-Stock Items (IN202000) form, for the *REPAIR* non-stock item, the *Service* type is selected on the **General Settings** tab, and the *SCREWDRIVER* equipment type is assigned on the **Resource Equipment Types** tab.

Process Overview

To assign to an appointment resource equipment that is necessary to perform a service, on the Appointments (FS300100) form, you create an appointment with the service for which resource equipment is required. You then check the Resource Equipment History (FS656500) report to define which equipment can be used during the appointment, and assign the selected resource equipment to the appointment. You can then track the usage history of the selected piece of equipment on the Appointment Summary (FS400100) form.

To open any form, you can navigate to it or search for it (by its name or by its form ID without periods).

Step 1: Preparing the System

Do the following:

1. Launch the Acumatica ERP website, and sign in as the service manager by using the *brawner* login and the *123* password.

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2019*. If a different date is displayed, click the Business Date menu button, and select the *1/30/2019* date from the calendar. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

Step 2: Creating an Appointment

To create the appointment for which resource equipment will be used, do the following:

1. Open the Appointments (FS300200) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
   - **Service Order Type**: *MRO*
   - **Customer**: *COFFEESHOP (FourStar Coffee & Sweets Shop)*
3. On the **Settings** tab, specify the date and time of the appointment as follows:
   a. In the **Scheduled Date** box, select *2/4/2019*.
   b. In the **Scheduled Start Time** box, select *9:00 AM*.
4. On the table toolbar of the **Services** tab, click **Add Row**; in the **Inventory ID** column of the row, select *REPAIR*.
5. Save your changes.

Step 3: Selecting a Piece of Resource Equipment to Be Used in the Appointment

1. On the Resource Equipment History (FS656500) report form, in the **End Date** box, select *2/04/2019*.
2. On the form toolbar, click **Run Report**.

   The report opens with the details on each piece of equipment that is used in appointments. Note that there is no resource equipment that is already in use during the scheduled time of the appointment. You can assign any piece of resource equipment to the created appointment.
3. Open the Appointments (FS300200) form with the created appointment.
4. On the **Resource Equipment** tab, click **Add Row** on the table toolbar, and select the *FSE00001 (Vissko Screwdriver Set)* equipment.
5. Save your changes.

Step 4: Reviewing the Resource Equipment History

Review the history of appointments to which a resource equipment entity has been assigned as follows:

1. Open the Equipment (FS205000) form, and select *FSE00001* in the **Equipment Nbr.** box.
2. On the form toolbar, click **Inquiries** > **Resource Equipment History**.

   The Appointment Summary (FS400100) form opens with the *FSE00001* resource equipment selected in the **Resource Equipment** box.
3. Clear the **Staff Member** box.
4. In the **To Scheduled Date** box, select a date that is later than the date of the created appointment.

   You can view all appointments for the selected time range in which the resource equipment has been or will be used to provide services, as the following screenshot shows.

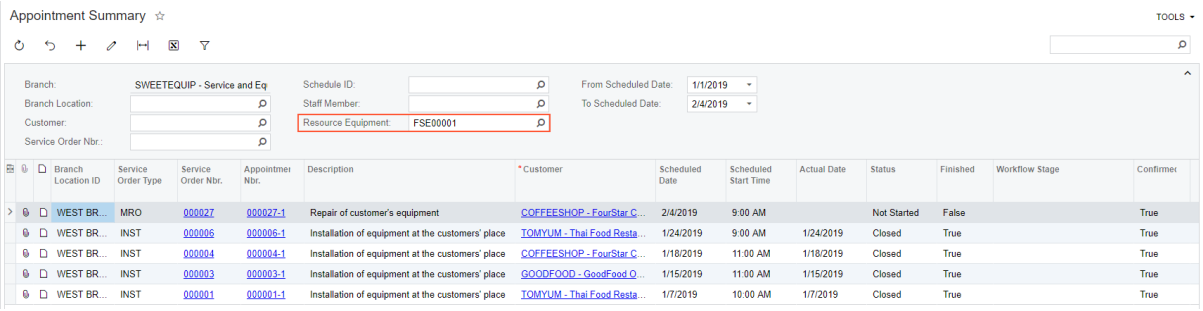


Figure: Appointments related to the resource equipment

Forms Used

You have used the following forms to complete this lesson:

- *Appointment Summary* (FS400100)
- *Appointments* (FS300200)
- *Equipment* (FS205000)
- *Resource Equipment History* (FS656500)

Lesson 15: Processing Appointments by Using the Mobile App

In this lesson, you will learn how to process an appointment that requires additional inventory items, a prepayment, and a customer signature in the Acumatica ERP mobile app. You will also learn how to generate an invoice

In this training, we use the mobile app for Android devices. The appearance and functionality of the mobile app for iOS devices may differ somewhat.

Story

Suppose that Alberto Jimenez uses the Acumatica ERP mobile app to process the appointments that he attends. On January 31, 2019, he will arrive to the appointment location and process the appointment by using the mobile app. That is, he will start the appointment in the mobile app, add necessary information to the appointment, and show the appointment report to the customer. The customer needs to sign the appointment in the app. Alberto Jimenez will then complete the appointment, send the signed appointment to the customer, and generate a sales order by using the mobile app. Acting as Alberto Jiminez, you will perform these actions in the mobile app.

Configuration Overview

For the purposes of this lesson, the following features have been enabled on the Enable/Disable Features (CS100000) form:

- *Inventory and Order Management*, which provides the support of the sales order functionality
- *10 Staff Members* (under *Service Management*), which provides the ability to perform service-related activities for a company that has up to 10 staff members

The *MRO* service order type has been configured on the Service Order Types (FS202300) form to generate sales orders to bill customers for provided services. That is, **Sales Orders** has been selected under **Generate Invoices In** in the **Invoice Generation Settings** section (**Preferences** tab). Also, the **Require Customer Signature on Mobile App** check box has been selected for this service order type.

Before you proceed, you should install the mobile app on your device. Also, on your device, make sure that GPS location recording is switched on.

Process Overview

To process an appointment by using the mobile app, you filter appointments by employee, open an appointment, and view the appointment location on a map. You then perform the appointment by doing the following: start it, add inventory items, specify working times for the staff member, enter prepayment, obtain the customer's signature for the appointment, complete the appointment, and send the report with the signed appointment to the customer. Finally, you generate a sales order and open it.

Step 1: Signing Into the Mobile App

Do the following:

1. On the mobile device, tap the application icon to launch the app.
2. Enter the URL of your Acumatica ERP instance (for example, *http://my.site.acumatica.com*), and tap **Next**.
3. Sign in as staff member Alberto Jimenez by using the *jimenez* login and the *123* password.

Step 2: Viewing Appointments Assigned to a Staff Member

To view the appointments to which Alberto Jimenez, the staff member whose actions you are performing in the mobile app, is assigned, do the following:

1. On the main menu of the app, tap the **Appointments List** icon to see the appointments in list view.
2. Tap the Filter button, and specify the filter criteria so that the scheduled date range includes the 1/31/2019 date.
3. Tap the Save button at the top right.
4. Tap the *000011-1* appointment to open it.
5. On the Summary tab, tap the **View on Map** button to view the location of the appointment.
6. Close the map and return to the appointment.

Step 3: Starting the Appointment and Adding Additional Items

To start the appointment and add the inventory item, do the following:

1. While you are still viewing the appointment in the mobile app, tap the vertical ellipsis button (in the upper right corner) to open the action bar, and tap **Start Appointment**.
2. Tap the **Inventory Items** tab, and tap the Add Record button.

   The Inventory Items screen opens.
3. Specify the following settings:
   - **Inventory ID**: *BLADE20*
   - **Actual Quantity**: 1
4. In the **Target Equipment** section, in the **Equipment Action** box, select *N/A*.
5. Tap the Back button at the top left, and save the appointment.

Step 4: Entering a Prepayment

To enter a prepayment for the appointment in the app, do the following:

1. While still viewing the appointment in the mobile app, on the action bar, tap **Create Prepayment**.

   The Payments screen opens.
2. In the **Payment Amount** field, type `100`.
3. In the **Cash Account** box, select the *10200EQ (Equipment Checking)* account.
4. Clear **On Hold**.
5. Save and close the prepayment.

   The system returns to the appointment on the Appointments screen.
6. Tap the **Totals** tab, and in the **Prepayments** section, verify that the prepayment you have just created has appeared.

Step 5: Obtaining the Customer's Signature and Completing the Appointment

Sign the appointment (on behalf of the customer) and complete it (again acting as Alberto Jiminez) as follows:

1. While still viewing the appointment in the mobile app, on the action bar, tap **Preview Report**.

The report appears on the screen. The staff member shows this report to the customer to verify that all information has been entered correctly.

2. Close the report, and tap the **Additional** tab.
3. In the **Signature** section, specify the following settings:
   - **Full Name**: `Douglas Keatinge`
   - **I, the Person Above, Agree That the Appointment Has Been Completed**: Selected
4. Save these changes.
5. On the action bar, tap **Sign Report**.
6. In the form view of the appointment, on behalf of the customer, leave a signature, and tap **OK**.

   The image with the signature is now attached to the appointment.
7. On the **Summary** tab, select **Finished**.
8. Save your changes.
9. Tap **Complete Appointment** on the action bar.

   The signed report is attached to the appointment in the Files section. You can tap the attached report to view it.
10. On the action bar, tap **Send Email with Signed Appointment**.

    When you invoke this action, an email with the signed report attached is sent to the customer assigned to the appointment.

Step 6: Closing the Appointment and Generating a Sales Order

To close the appointment and generate an invoice, do the following:

1. While you are still viewing the appointment in the mobile app, on the action bar, tap **Close Appointment**.
2. On the action bar, tap **Generate Invoice**.

   The system creates a sales order and opens it on the Sales Order screen, as shown on the following screenshot. You could now show the sales order to the customer and process it by using the mobile app.

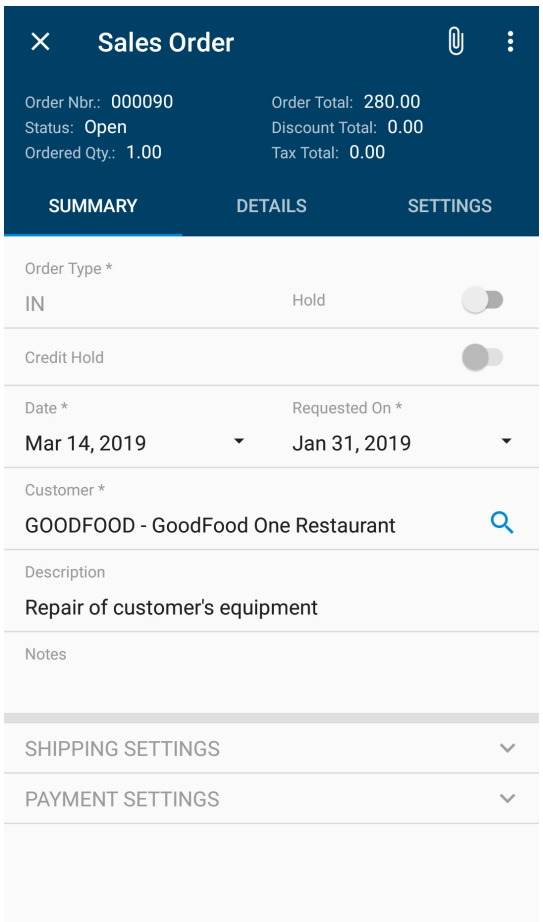


Figure: The sales order created for the appointment in the mobile app

Process Diagram

In the diagram below, you can see the general workflow of processing an appointment in the mobile app by a staff member.

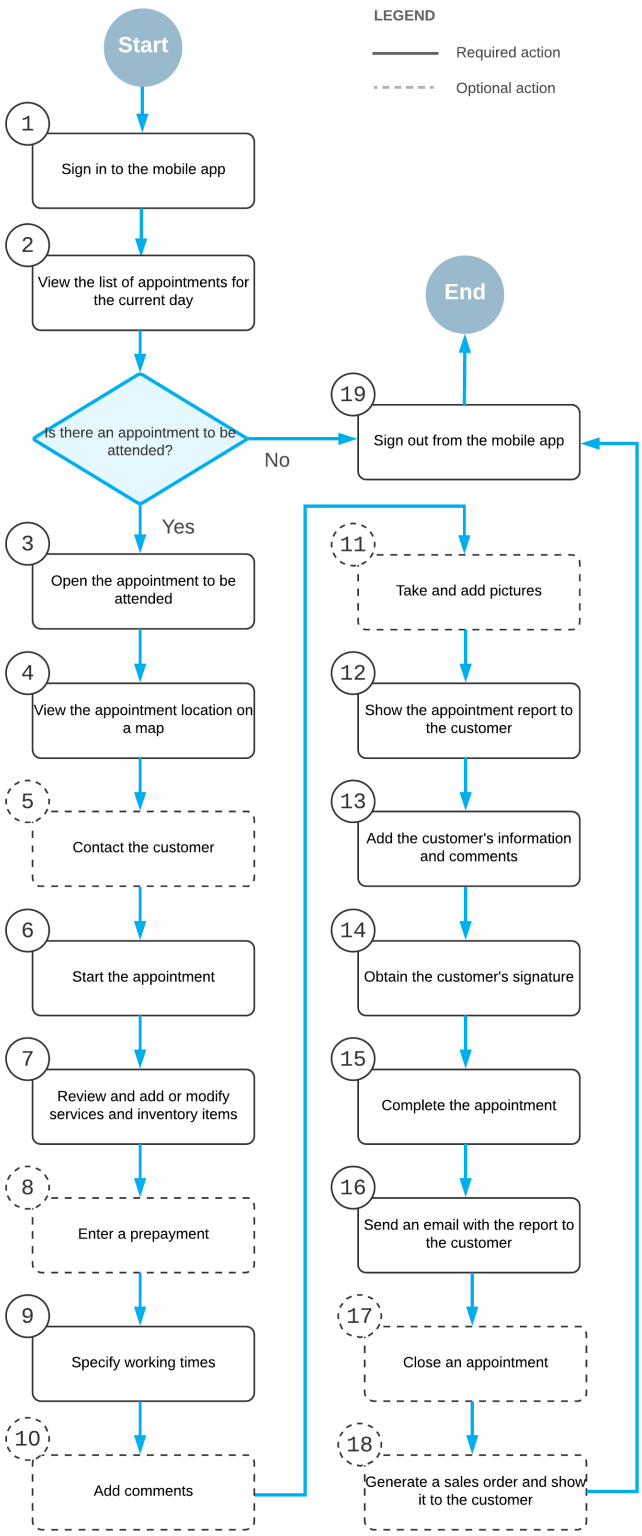


Figure: Processing an appointment in the mobile app

Additional References

You can refer to the following topics in the Acumatica ERP Help Portal (*https://help.acumatica.com/*) for additional information on concepts and procedures that are explained in the scope of this course.

Service Order Types

In Acumatica ERP, service order types are used to define the general settings for service orders and appointments associated with the particular type. For each type, you can configure quick processing so that users can process the service orders and appointments of this type with just one click. For details, see *Service Order Types* and *Configuration of Quick Processing*.

Staff Members

You can configure define an employee of your company or a vendor as a staff member who can perform the services that your company offers to customers. For each employee defined as a staff member, you can specify skills, service areas, licenses, and working hours. For more information, see *Managing Staff Members*.

Billing Customers

Before you start to record the services provided by your company for customers, billing cycles have to be created in the system and assigned to the customer accounts. Billing cycles define the method used to generate the invoices for the services provided to customers. For more information, see the *Managing Customers* chapter in the Field Services Guide.

Services

Acumatica ERP provides you with tools that help you to maintain your company's service information. In the system, you define the services that your company provides to customers as non-stock items. For each service, you can enter the skills needed for performing the service, the types of licenses that a staff member or the branch location needs to have for the service to be performed, and the equipment types that are necessary to perform the service. For details, see *Managing Services*.

Resource Equipment

In Acumatica ERP, you can maintain all the necessary information about equipment that your company uses to perform services. You can enter the equipment information, such as its serial number, registration information, manufacturing information, purchase information, owner, and location. For more information, see *Managing Resource Equipment*.

Labor, Stock and Non-Stock Item Costs

If you sell stock and non-stock items during appointments, you can track the item costs and profitability. You can also track the amounts paid to the employee for the job (labor costs). You can use this information for future planning, budgeting, forecasting, and performance reporting. For more information, see *Tracking the Costs of Stock and Non-Stock Items* and *Tracking Labor Costs*.

Time Activities for Staff Members

In Acumatica ERP, you can configure the system to record the time that staff members spend on attending appointments or performing services automatically. For more information, see *Integration with Time & Expenses*.

Integration of Service Orders and Other Documents

If a sales order, opportunity, or case contains services, a service order can be created to process the services. A purchase order can be created from the service order if the necessary stock items are not at any of your company's warehouses, or if services or non-stock items are provided by vendor. For more details, see the *Service Management Use Cases*.