**Job Aids**

Service Consultant 2021 R2

**Contents**

[Processing Appointments 3](#_Toc93585982)

[To Start an Appointment 4](#_Toc93585983)

[To Add Services to a Service Order or Appointment by Using the Add Items Button 5](#_Toc93585984)

[To Add Services to a Service Order or Appointment by Using the Details Tab 6](#_Toc93585985)

[To Add Inventory Items to a Service Order or Appointment 7](#_Toc93585986)

[To Attach a File to an Appointment 8](#_Toc93585987)

[To Attach a File to an Appointment Line 9](#_Toc93585988)

[To Attach a Note to an Appointment 10](#_Toc93585989)

[To Attach a Note to an Appointment Line 11](#_Toc93585990)

[To Create a Prepayment for an Appointment 12](#_Toc93585991)

[To Specify Staff Member Working Time 13](#_Toc93585992)

[To Complete an Appointment 14](#_Toc93585993)

[To Reopen an Appointment 15](#_Toc93585994)

[Executing Routes 16](#_Toc93585995)

[To Start a Route Execution 17](#_Toc93585996)

[To Complete a Particular Route Execution 18](#_Toc93585997)

[To Reopen a Route Execution 19](#_Toc93585998)

# Processing Appointments

This chapter contains instructions related to processing of appointments in Acumatica ERP.

## To Start an Appointment

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Appointment Nbr.** box, select the appointment you want to start. You can also open the particular appointment in one of the following ways:
   * By clicking the appointment number in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form
   * By clicking the appointment number in the calendar on the [*Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=00cc92c3-408f-4fe3-b6bf-e801559f74f9) (FS300300) form
   * By clicking the appointment number in the **Appointment Nbr.** column on the **Appointments** tab of the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form
3. On the form toolbar, click **Start**.
4. In the **Actual Date and Time** section of the **Settings** tab, check the **Actual Start Date** and

**Actual Start Time** boxes.

1. Click **Save** on the form toolbar.

## To Add Services to a Service Order or Appointment by Using the Add Items Button

1. Navigate to one of the forms by doing the following:
   * If you want to add services to a service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
   * If you want to add services to an appointment, open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the service order or appointment.
3. Depending on whether you are adding services to a service order or an appointment, in the **Service Order Nbr.** or **Appointment Nbr.** box, select the reference number of the needed service order or appointment.
4. On the **Details** tab, click the **Add Items** button. In the **Inventory Lookup** dialog box, which opens, do the following:
5. In the **Line Type** box, select the type of inventory, for example, *Service*.
6. If needed, in the **Item Class ID** box, select the service class of the service to narrow the list of services.
7. Select the unlabeled check box in the line or lines line with the services to be added and click **Add & Close**.

The selected lines are added on the **Details** tab of the form.

1. On the **Details** tab, do the following for each listed service:
2. Check the estimated duration of the service delivery in the **Estimated Duration** column.
3. Check the price for the service unit in the **Unit Price** column.
4. Click **Save** on the form toolbar.

## To Add Services to a Service Order or Appointment by Using the Details Tab

1. Navigate to one of the forms by doing the following:
   * Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form to add services to a service order.
   * Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form to add services to an appointment.
2. In the **Service Order Type** box, select the service order type related to the service order or appointment.
3. Depending on whether you are adding services to a service order or an appointment, in the **Service Order Nbr.** or **Appointment Nbr.** box, select the reference number of the needed service order or appointment.
4. On the **Details** tab, for each service you want to add, click **Add Row** and do the following:
5. In the **Inventory ID** column, select the identifier of the service you want to add to the service order or appointment.
6. Check the billing rule for the service in the **Billing Rule** column.
7. Check the estimated duration of the service delivery in the **Estimated Duration** column.
8. Check the price for the service unit in the **Unit Price** column.
9. On the form toolbar, click **Save**.

## To Add Inventory Items to a Service Order or Appointment

1. Navigate to one of the forms by doing the following:
   * If you want to add services to a service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
   * If you want to add services to an appointment, open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the service order or appointment.
3. Depending on whether you are adding services to a service order or an appointment, in the **Service Order Nbr.** or **Appointment Nbr.** box, select the reference number of the needed service order or appointment.
4. On the **Details** tab, for each inventory item (stock item) you want to add, click **Add Row** and do the following:
5. In the **Inventory ID** column, select the identifier of the stock item you want to add to the service order or appointment.
6. In the **Estimated Quantity** column, specify the quantity of the stock items.
7. Check the price for the stock item in the **Unit Price** column.
8. Click **Save** on the form toolbar.

## To Attach a File to an Appointment

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the appointment.
3. In the **Appointment Nbr.** box, select the reference number of the appointment.
4. To attach a file to a record, use one of the following methods:
   * Open the folder or library where the file is located and drag it to the Summary area of the form.
   * Use the **File Upload** dialog box:
5. On the form title bar, click **Files**.
6. In the **Files** dialog box, click **Browse**.
7. Select the file you want to attach, click **Open**, and then click **Upload**.

## To Attach a File to an Appointment Line

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the appointment.
3. In the **Appointment Nbr.** box, select the reference number of the appointment.
4. If you want to add a file to a service or a stock item, on the **Details** tab, at the beginning of the appropriate detail row, click Files () to open the **Files** dialog box.
5. In the **Files** dialog box, click **Browse**.
6. Select the file you want to attach, and click **Open** and then click **Upload**.

## To Attach a Note to an Appointment

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the appointment.
3. In the **Appointment Nbr.** box, select the reference number of the appointment.
4. On the form title bar, click **Notes**.
5. In the **Enter Record Note** dialog box, type the text of the note.
6. Click **OK**.

On the form title bar, make sure that the icon color near the **Notes** button has changed from white to yellow.

1. Click **Save** on the form toolbar.

## To Attach a Note to an Appointment Line

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the appointment.
3. In the **Appointment Nbr.** box, select the reference number of the appointment.
4. If you want to add a note to a service or a stock item, on the **Details** tab, at the beginning of the appropriate detail row, click Note ( ).
5. In the **Enter Record Note** dialog box, type the text of the note.
6. Click **OK**.

Verify that the icon color in the **Notes** ( ) column has changed from white to yellow.

1. Click **Save** on the form toolbar.

## To Create a Prepayment for an Appointment

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type related to the appointment for which you want to create the prepayment.
3. In the **Appointment Nbr.** box, select the reference number of the needed appointment.
4. On the table toolbar on the **Prepayments** tab, click **Create Prepayment** button.

The [*Payments and Applications*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ae844bf4-1aef-42cd-9e2f-49b3ee1bc8d7) (AR302000) form opens in a pop-up window with the *Prepayment*

type selected.

1. In the **Payment Amount** box, enter the amount that has been prepaid by the customer.
2. Click **Save** and then **Release**.

## To Specify Staff Member Working Time

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Appointment Nbr.** box, select the appointment you want to start. You can also open the particular appointment in one of the following ways:
   * By clicking the appointment number in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form
   * By clicking the appointment number in the calendar on the [*Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=00cc92c3-408f-4fe3-b6bf-e801559f74f9) (FS300300) form
   * By clicking the appointment number in the **Appointment Nbr.** column on the **Appointments** tab of the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form
3. On the **Staff** tab, click the row and click **Actions > Start** on the table toolbar. In the **Perform Action** dialog box that opens, do the following:
4. In the **Date** box, specify the actual date and time when you started to work.
5. In the table, make sure the unlabeled check box is selected for the row.
6. Click **OK**.
7. On the table toolbar, click **Actions > Complete**. In the **Perform Action** dialog box, do the following:
8. In the **Logging** box, select the setting that defines for which items the action is performed, for example, *Service*.
9. In the **Date** box, specify the actual date and time when you completed to work.
10. In the table, make sure the unlabeled check box is selected for the row.
11. Click **OK**.

## To Complete an Appointment

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Service Order Type** box, select the service order type of the appointment.
3. In the **Appointment Nbr.** box, select the appointment you want to complete. You can also open the particular appointment in one of the following ways:
   * By clicking the appointment number in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form
   * By clicking the appointment number in the calendar on the [*Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=00cc92c3-408f-4fe3-b6bf-e801559f74f9) (FS300300) form
   * By clicking the appointment number in the **Appointment Nbr.** column on the **Appointments** tab of the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form
4. In the **Actual Date and Time** section of the **Settings** tab, in the **Actual End Time** box, specify the time when the appointment ended.
5. If all the work is completed successfully and no follow-up appointment is needed, select the

**Finished** check box.

1. On the form toolbar, click **Complete**.

## To Reopen an Appointment

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.
2. In the **Appointment Nbr.** box, select the appointment you want to reopen. Note, that the appointment should have the *Completed* status.
3. On the More menu (under **Corrections**), click **Reopen**.

# Executing Routes

This chapter contains instructions related to executing of routes in Acumatica ERP.

## To Start a Route Execution

1. Open the [*Route Document Details*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b26fcf32-359a-4ef3-97e4-ab697fcfcdb1) (FS304000) form.
2. In the **Route Nbr.** box, select the route which you want to start.
3. On the More menu (under **Processing**), click **Start**. The route execution is assigned the *In Process* status.
4. In the **Actual Start Time** box of the **Actual Time** section, make sure the time when the route execution was started is correct.

## To Complete a Particular Route Execution

1. Open the [*Route Document Details*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b26fcf32-359a-4ef3-97e4-ab697fcfcdb1) (FS304000) form.
2. In the **Route Nbr.** box, select the route execution that you want to complete.
3. On the More menu (under **Processing**), click **Complete**. The route execution is assigned the *Completed* status.

## To Reopen a Route Execution

1. Open the [*Route Document Details*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b26fcf32-359a-4ef3-97e4-ab697fcfcdb1) (FS304000) form.
2. In the **Route Nbr.** box, select the route execution that you want to reopen.
3. On the More menu (under **Corrections**), click **Reopen**. The route execution gets the *Open* status.