**Job Aids**

Service Manager 2021 R2

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# Managing Cases and Opportunities

This chapter contains instructions related to managing of cases and opportunities in Acumatica ERP.

## To Create a Case

1. Open the [*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area of the form, do the following:
   1. In the **Class ID** box, select the case class on which your case will be based.
   2. In the **Business Account** box, select the customer that is associated with the case and that will be billed for case resolution.

This step is required if the **Require Customer** check box is selected for the case class that you selected.

* 1. In the **Contact** box, select the customer representative who should be contacted about the case.

This step is required if the **Require Contact** check box is selected for the case class that you selected.

* 1. In the **Owner** box, select the employee of your company to whom you want to assign the case. If a workgroup has been specified on the **Additional Info** tab, you can select a user only from the list of the group members.
  2. In the **Subject** text box, type a brief description of the case.
  3. If needed, in the **Severity** box, select the severity level of the case.
  4. If needed, in the **Priority** box, select the priority level of the case.

1. On the **Additional Info** tab, do the following:
   1. If needed, in the **Location** box, select the location of the customer.
   2. Select the **Billable** check box if you want the case to be billable.
   3. If needed, in the **Workgroup** box, select the workgroup to be associated with the case. (If you have already selected an owner who is not included in this workgroup, the **Owner** box will be cleared.)
2. If needed, on the **Details** tab, in the Message text box, type a detailed description of the case.
3. On the form toolbar, click **Save**.

## To Create a Service Order Based on a Case

1. Open the Cases (CR3060PL) form.
2. On an appropriate filter tab, click the case based on which you want to create a service order. The [*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) form opens. The form is filled in with the data of the selected case.
3. On the More menu (under **Services**), click **Create Service Order**.
4. In the **Create Service Order** dialog box, which opens, do the following:
   1. In the **Service Order Type** box, select the type of the service order to be created.
   2. In the **Branch Location** box, select the location of the branch that delivers the services.
   3. Click **OK**.

The [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form opens.

1. On the **Details** tab, add the necessary services to the service order.
2. If applicable, on the **Details** tab, add the necessary inventory items to the service order.
3. Click **Save** on the form toolbar.
4. If needed, you can add a task to a case with a service by doing the following for the case on the

[*Cases*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=a492a091-9649-4826-bcc3-dccdf8765efd) (CR306000) form:

* 1. On the **Activities** tab, click **Create Task**. The [*Task*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6449513c-254e-4093-b7b8-06de0108c384) (CR306020) form opens.
  2. In the **Summary** box of the **Details** tab, type a summary description of the task.
  3. In the **Service** box, select the service related to the task.
  4. On the form toolbar, click **Save & Close**. The service is added to the case.

## To Create an Opportunity

1. Open the [*Opportunities*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=5cb49cd5-2be8-4617-9341-958f1c5d6d53) (CR304000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the Summary area, do the following:
   1. In the **Class ID** box, select the opportunity class.
   2. In the **Stage** box, select the current stage of the opportunity.
   3. In the **Estimated Close Date** box, select the estimated date of closing the deal.
   4. In the **Subject** box, specify the subject of the opportunity or a description.
   5. If needed, in the **Business Account** box, select the business account of the prospective customer.
   6. If needed, in the **Contact** box, select the contact to be associated with the opportunity.
   7. If needed, in the **Owner** box, select the employee to be assigned to the opportunity.
3. On the **CRM Info** tab, specify the following information:
   1. If needed, in the **Source** box, select the source of the opportunity.
   2. If needed, in the **Source Campaign** box, select the source campaign of the opportunity.
4. In the **Project** box on the **Financial** tab, select the project to be associated with the opportunity or specify the non-project code.
5. On the form toolbar, click **Save**.

## To Create a Service Order Based on an Opportunity

1. Open the Opportunities (CR3040PL) form.
2. On an appropriate filter tab, click the opportunity based on which you want to create a service order.

The [*Opportunities*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=5cb49cd5-2be8-4617-9341-958f1c5d6d53) (CR304000) form opens. The form is filled in with the data of the selected opportunity.

1. On the More menu (under **Services**), click **Create Service Order**.
2. In the **Create Service Order/Appointment** dialog box, which opens, do the following:
   1. In the **Service Order Type** box, select the type of the service order to be created.
   2. In the **Branch** box, select the branch specified for the opportunity.
   3. In the **Branch Location** box, select the location of the branch that delivers the services.
   4. In the **Project** box, select the project to be associated with the opportunity.
   5. Click **Create and Review**.

The [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form opens. The data specified on the **Details** tab is copied from the **Details** tab of the [*Opportunities*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=5cb49cd5-2be8-4617-9341-958f1c5d6d53) form.

# Processing Service Orders

This chapter contains instructions related to processing service orders in Acumatica ERP.

## To Create a Service Order

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Service Order Type** box, select the type of the service order.
3. In the **Customer** box, select the customer who has ordered a service.
4. If needed, check the location of the customer in the **Location** box.
5. Check the branch location of your company that delivers the service in the **Branch Location**

box.

1. In the **Project** box, select a particular project if this order is associated with the project. (The non-project code is inserted by default.)
2. If a particular project is selected, in the **Default Project Task** box, select the default task for the project.
3. If the service order is related to a service contract with the *End-Period Plus*, *Beginning-Period Plus*, or *Beginning-Period Fixed* billing types, in the **Service Contract** box, select the identifier of the service contract.
4. In the **Date** box, check the date when the services were ordered.
5. In the **Description** box, provide a brief description of the service order.
6. On the **Details** tab, add the services that will be provided.
7. On the form toolbar, click **Save**.

## To Copy a Quote

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the quote that you want to copy. (This must be a service order type with the *Quote* behavior.)
3. In the **Service Order Nbr.** box, select the number of the quote that you want to copy to a service order. It should have the *Confirmed* status.
4. On the form toolbar, click **Copy**. The **Select the New Service Order Type** dialog box opens.
5. In the **Service Order Type** box of the dialog box, select the service order type of the service order you want to create.
6. Click **Proceed**. The [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) form opens with the service order you have created.
7. On the form toolbar, click **Save**.

## To Add Services to a Service Order or Appointment

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 Create a Purchase Order for a Service Order

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order for which you want to create the prepayment.
3. In the **Service Order Nbr.** box, select the reference number of the needed service order.
4. On the **Details** tab, for the services and non-stock items that you want to purchase from vendors, do the following.
   1. Select the **Mark for PO** check box for the non-stock items that you want to purchase from the vendor.
   2. In the **Vendor ID** column, check the vendor who will provide the item or add the vendor manually if the system has not inserted it automatically.
   3. In the **Vendor Location ID** column, check the vendor location which will provide the item.
5. On the **Details** tab, do the following for each stock item you want to purchase from vendors:
   1. Select the **Mark for PO** check box for the stock items that you want to purchase from the vendor.
   2. In the **Vendor ID** column, check the vendor who will provide the item and change it if needed.
   3. In the **Vendor Location ID** column, check the vendor location which will provide the item and change it if needed.
6. On the More menu (under **Replenishment**), click **Create Purchase Order**. The [*Create Purchase Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=dc527541-a18a-44c9-8d51-6d2d77a37443) (PO505000) form opens.
7. On the form, do one of the following:

* To process all listed items, click **Process All** on the form toolbar.
* To process only selected items, select the appropriate unlabeled check box for each item you want to process, and on the form toolbar, click **Process**.

## To Allocate Items for a Service Order

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order for which you want to allocate items.
3. In the **Service Order Nbr.** box, select the reference number of the needed service order.
4. On the **Details** tab, click the line with the stock item that you want to allocate, and then on the table toolbar, click **Line Details**.

The **Line Details** dialog box opens.

1. In the **Allocated** column, select the check box.
2. In the **Alloc. Warehouse** column, check the warehouse where the specified quantity of the item is allocated, and change it if needed.
3. If needed, if the item is tracked by lot or serial number, in the **Lot/Serial Nbr.** box, select the lot or serial number of the item.
4. Click **OK** to close the dialog box.
5. On the form toolbar, click **Save**.

## To Print a Service Order or Quote

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order or quote you want to print.
3. In the **Service Order Nbr.** box, select the service order or quote that you want to print. (You can select from the list of only service orders of the selected type.)
4. On the More menu (under **Printing and Emailing**), click **Print Service Order**.
5. On the [*Service Order*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=5f7c8485-b190-4621-96ea-32a1f42199dc) (FS641000) report, which opens, do one of the following:
   * On the form toolbar, click **Print**, then select your printer, and click **OK** to print the service order or quote on paper.
   * On the form toolbar, click **Send**, then enter the needed information into the email, and click

**Send** to send the service order or quote by email.

* + On the form toolbar, click **Export**, then click the format, and click **OK** to save the service order or quote in Excel or PDF format.

## To Create a Prepayment for a Service Order

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order for which you want to create the prepayment.
3. In the **Service Order Nbr.** box, select the reference number of the needed service order.
4. On the **Prepayments** tab, click **Create Prepayment**.

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

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

## To Quickly Process a Service Order

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box of the Summary area, select the type of the service order that you want to process.
3. In the **Service Order Nbr.** box, select the reference number of the service order that you want to process, or create a new order, enter its information, and save.
4. On the form toolbar, click **Quick Process**.
5. If needed, in the **Process Service Order** dialog box, which appears, modify the settings.
6. Click **OK** to close the dialog box and run quick processing of the service order.

## To Cancel Service Orders

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order you want to cancel.
3. In the **Service Order Nbr.** box, select the service order that you want to cancel. (You can select from the list of only service orders of the selected type.)
4. On the **Appointments** tab, make sure that all the appointments related to the service order have the *Not Started* or *Canceled* status.
5. On the More menu (under **Processing**), click **Cancel**.

# Scheduling Appointments

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

## To Create an Appointment Related to a Service Order

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.

You can also open the particular appointment in one of the following ways:

* + By clicking the **Open Appointment Screen** button on the table toolbar of the **Appointments** tab of the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) 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
  + By clicking the **Appointment** button 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** button in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form

1. In the **Service Order Type** box, select the service order type related to the appointment.
2. In the **Service Order Nbr.** box, select the service order for which you want to create an appointment.
3. In the **Scheduled Date and Time** section of the **Settings** tab, perform the following actions:
   * In the **Scheduled Start Date** box, check the planned date and time when the appointment is going to start.
   * In the **Scheduled End Date** box, check the planned date and time when the appointment is going to end.
   * If the appointment has been confirmed with the customer, select the **Confirmed** check box.
   * If a staff member has been assigned to the appointment (and the appointment has been confirmed with the customer), select the **Validated by Dispatcher** check box.
4. If needed, on the **Details** tab, perform the following steps:
   * If services have been added to the service order, check the services and change them if needed. (If there are multiple appointments associated with a service order, only some of the listed services might be performed at the appointment).
   * If services have not been added to the service order, add the services that will be provided.
5. If services have been added to the appointment, on the **Staff** tab, perform the following steps:
   * If staff members have been assigned to perform services, make sure the appropriate persons have been assigned.
   * If staff members have not been assigned to perform services, assign the staff members who will perform services.
6. If needed, if the customer has purchased stock items along with services, on the **Details** tab, click **Add Row** and select the first stock item from the list.
7. If needed, on the **Resource Equipment** tab, click **Add Row** and select the first particular type of resource equipment that is necessary for performing the service from the list.
8. On the form toolbar, click **Save**.

## To Create an Appointment Without a Service Order

1. Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Service Order Type** box of the Summary area, check the service order type that has been inserted by default, and change it if needed.
3. In the **Customer** box, select the customer that has ordered the service or services.
4. Check the location of the customer in the **Location** box.
5. In the **Branch Location** box, check the branch location of your company that delivers the service.
6. In the **Project** box, select a particular project if this appointment is associated with a project. (The non-project code is inserted by default.)
7. If needed, if you selected a particular project, in the **Default Project Task** box, select the default task for the project.
8. If the appointment is related to a service contract with the *End-Period Plus*, *Beginning-Period Plus*, or *Beginning-Period Fixed* billing types, in the **Service Contract** box, select the identifier of the service contract.
9. In the **Scheduled Date** box, check the planned date of the appointment, and change it if needed.
10. If needed, in the **Description** box, provide a brief description of the appointment.
11. On the **Settings** tab, do the following:
    * To override the default details in the **Contact** or **Address** section, select the **Override** check box, and change the necessary details.
    * In the **Scheduled Start Date** box, check the planned date and time when the appointment is going to start.
    * In the **Scheduled End Date** box, check the planned date and time when the appointment is going to end.
    * If the appointment has been confirmed with the customer, select the **Confirmed** check box.
    * If a staff member has been assigned to the appointment (and the appointment has been confirmed with the customer), select the **Validated by Dispatcher** check box.
12. On the **Details** tab, add the services that will be provided at this appointment.
13. If the customer has purchased stock items along with services, on the **Details** tab, click **Add Row** on the table toolbar, and select one of the purchased stock items from the list. Perform this step for each purchased stock item.
14. On the **Staff** tab, specify the staff members who will perform the services.
15. If needed, on the **Resource Equipment** tab, click **Add Row** on the table toolbar, and select a particular type of resource equipment that is necessary for performing the services from the list. Perform this step for each needed type of resource equipment.
16. On the form toolbar, click **Save**.

## To Clone an Appointment

1. Open the [*Clone Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=03d8660a-796b-4a90-9add-0ad5d7e2ed4d) (FS500201) form by one of the following ways:
   * Open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form. In the **Appointment Nbr.** box, select the appointment you want to clone. On the More menu (under **Scheduling**), click **Clone**.
   * Open the **Calendar Board** (FS300300) form. In the **Date** box, select the date of the appointment that you want to clone. On the dashboard, right-click the appointment and click **Clone**.
2. In the **Cloning Type** section, make sure *Single* is selected.
3. In the **Date** box of the **Cloning Details** section, select the planned date of the appointment.
4. In the **Scheduled Start Time** box of the **Appointment Details** section, select the time when the new appointment is scheduled to start.
5. On the form toolbar, click **Process**.

## To Send a Notification Email to a Customer

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 about which you want to notify the customer.

You can also open the particular appointment in one of the following ways:

* + 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
  + By clicking the **Appointment** button 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** button in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form

1. Make sure the **Confirmed** check box on the **Settings** section is selected for the appointment, the needed items are added on the **Details** tab, and a staff member is assigned on the Staff tab.
2. On the More menu (under **Printing and Emailing**), click **Email Confirmation to Customer**.
3. To send the email, go to **Emails Pending Processing** (SM507000) form.
4. Do one of the following:
   * On the form toolbar, click **Process All** to process all listed emails.
   * On the form toolbar, select the unlabeled check box for each email you want to process and click **Process** to process only selected emails.

## To Print 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 about which you want to notify the staff member.

You can also open the particular appointment in one of the following ways:

* + 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

* + By clicking the **Appointment** button 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** button in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form

1. On the More menu (under **Printing and Emailing**), click **Print Appointment**.
2. In the [*Appointment*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=24c69c0a-cc06-41c4-9f4a-7672fe74c3f7) (FS642000) report, which opens, do one of the following:
   * On the form toolbar, click **Print**, then select your printer, and click **Print** to print the appointment on paper.
   * On the form toolbar, click **Send**, then enter the necessary information into the email, and click **Send** to send the appointment by email.
   * On the form toolbar, click **Export**, select the format, and open downloaded file to save the appointment in Excel or PDF format.

## To Cancel 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 cancel. You can also open the particular appointment in one of the following ways:
   * By clicking the **Open Appointment Screen** button on the table toolbar of the **Appointments** tab of the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form
   * By clicking the **Appointment** button 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** button in the calendar on the [*Staff Calendar Board*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b1d15e47-fba9-4bbf-a7fa-2f7c396c8df4) (FS300400) form
3. On the More menu (under **Processing**), click **Cancel**.

## 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**.

## To Quickly Process 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 of the Summary area, select the type of the appointment that you want to process.
3. In the **Appointment Nbr.** box, select the reference number of the appointment that you want to process.
4. On the form toolbar, click **Quick Process**.

The **Quick Process** button is available only if the appointment has the *Completed* or *Closed* status, the service order type selected in the **Service Order Type** box allows quick processing, and the billing cycle associated with the customer is defined to generate billing documents from appointments.

1. If needed, in the **Process Appointment** dialog box, which appears, modify the settings.
2. Click **OK** to close the dialog box and run quick processing of the appointment.

# Processing Billing Documents

This chapter contains instructions related to processing of customers' billing documents for service orders and appointments in Acumatica ERP.

## To Generate a Billing Document from a Particular 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 generate the billing document.
3. In the **Appointment Nbr.** box, select the appointment for which you want to generate the billing document.
4. On the More menu (under **Processing**), click **Run Billing**.

## To Generate Billing Documents from Multiple Appointments

1. Open the [*Run Appointment Billing*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=f1d027ae-c546-47ab-b861-1b7670532bd9) (FS500100) form.
2. In the **Generated Billing Documents** box, select one of the following values:
   * If the **AR Documents** option button is selected on the [*Service Order Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=06fd8a36-dd81-4df9-b609-92c3d552c542) (FS202300) form for the related service order type, select *AR Documents and/or AP Bills*.
   * If the **Sales Orders** option button is selected, select *Sales Orders*.
   * If the **SO Invoices** option button is selected, select *SO Invoices*.
   * If the **Project Transactions** option button is selected, select *Project Transactions*.
3. If needed, in the **Billing Cycle** box, select the billing cycle to generate invoices for the appointments associated with this billing cycle only.
4. If needed, in the **Billing Customer** box, select the customer to generate invoices for this customer only.
5. If needed, in the **Up to Date** box, select the date up to which you want the system to display appointments in the list. By default, the current business date is selected.
6. If you want all completed and closed service orders to be shown in the list, select the **Ignore the Time Frame** check box. All completed and closed service orders, regardless of their billing cycle grouping settings, will be shown in the list
7. In the **Billing Date** box, select the date to be used in the generated documents.
8. In the **Billing Period** box, check the period to be used in the generated documents.
9. If needed, if the *Sales Orders* option is selected in the **Generated Billing Documents** box, do the following:
10. To also create an invoice for each sales order generated by the process, select the **Prepare Invoice** check box.
11. If the **Prepare Invoice** check box is selected, to automatically release the created invoice, select the **Release Invoice** check box.
12. To send an email with each generated sales order to the associated customer, select the

**Email Sales Order/Quote** check box.

1. To process sales orders of the order type based on the *IN* order template by using the quick process set up for sales orders, select the **Use Sales Order Quick Processing** check box.
2. Do one of the following:
   * To process all listed appointments, click **Process All** on the form toolbar.
   * To process only selected appointments, select the unlabeled check box in the row of each appointment you want to process, and on the form toolbar, click **Process**.

## To Allow Billing for a Service Order on the Service Orders Form

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order for which you want to allow generation of invoices.
3. In the **Service Order Nbr.** box, select the service order that you want to complete.
4. On the More menu (under **Processing**), click **Allow Billing**.

## To Allow Billing for Multiple Service Orders on the Process Service Orders Form

1. Open the [*Process Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=1495e11e-6751-43f7-b6bd-287fae73ca6e) (FS501100) form.
2. In the **Action** box, select *Allow Billing*.
3. In the **Service Order Type** box, select the service order type of the service orders for which you want to allow generation of invoices.
4. In the **Branch** box, select the branch that is specified for the service orders for which you want to allow generation of invoices.
5. In the **Branch Location** box, select the branch location that is specified for the service orders for which you want to allow generation of invoices.
6. In the **Customer ID** box, select the customer that made service orders for which you want to allow generation of invoices.
7. In the **Service Contract ID** box, select the service contract related to the service orders for which you want to allow generation of invoices.
8. In the **From Date** box, specify the start date from which the service orders will be displayed in the list.
9. In the **To Date** box, specify the end date until which the service orders will be displayed in the list.
10. Do one of the following:
    * Click **Process All** to allow generation of invoices for all the listed service orders.
    * Select the unlabeled check box in the row of each service order for which you want to allow generation of invoices. Click **Process**.

## To Generate a Billing Document for a Particular Service Order

1. Open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
2. In the **Service Order Type** box, select the service order type related to the service order for which you want to generate the billing document.
3. In the **Service Order Nbr.** box, select the service order for which you want to generate the billing document.
4. On the More menu under **Processing**, click **Run Billing**.

## To Generate Billing Documents for Multiple Service Orders

1. Open the [*Run Service Order Billing*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=4df1e52f-392a-4342-a219-335b86dcdd18) (FS500600) form.
2. In the **Generated Billing Documents** box, select one of the following values:
   * If the **AR Documents** option button is selected on the [*Service Order Types*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=06fd8a36-dd81-4df9-b609-92c3d552c542) (FS202300) form for the related service order type, select *AR Documents and/or AP Bills*.
   * If the **Sales Orders** option button is selected, select *Sales Orders*.
   * If the **SO Invoices** option button is selected, select *SO Invoices*.
   * If the **Project Transactions** option button is selected, select *Project Transactions*.
3. In the **Billing Cycle** box, select the billing cycle to view (and generate invoices for) the service orders associated with only this billing cycle.
4. In the **Billing Customer** box, select the customer to view (and generate invoices for) the service orders of only this customer.
5. In the **Up to Date** box, select the date up to which you want the system to display service orders in the list. By default, the current business date is selected.
6. Select the **Ignore Time Frame** check box to see completed and closed service orders in the list.
7. In the **Billing Date** box, select the date to be used in the generated documents.
8. In the **Billing Period** box, check the period to be used in the generated documents.
9. If needed, if the *Sales Orders* option is selected in the **Generated Billing Documents** box, do the following:
10. To also create an invoice for each sales order generated by the process, select the **Prepare Invoice** check box.
11. If the **Prepare Invoice** check box is selected, to automatically release the created invoice, select the **Release Invoice** check box.
12. To send an email with each generated sales order to the associated customer, select the

**Email Sales Order/Quote** check box.

1. To process sales orders of the order type based on the *IN* order template by using the quick process set up for sales orders, select the **Use Sales Order Quick Processing** check box.
2. Do one of the following:
   * To process all listed service orders, click **Process All** on the form toolbar.
   * To process only selected service orders, select the unlabeled check box for each service order you want to process, and on the form toolbar, click **Process**.

# Processing Service Contracts

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

## To Create a Master Contract

1. Open the [*Master Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=2432ce61-06a6-4301-91fc-b141eb1bfc8e) (FS204700) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Master Contract ID** box, type the identifier of the master contract.
3. In the **Customer** box, select the customer with which the contract is signed.
4. If needed, in the **Branch** box, select the branch that provides services associated with the contract.
5. In the **Description** box, enter a brief description of the master contract.
6. On the form toolbar, click **Save**.

## To Create a Service Contract Billed at the End of the Period

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Customer** box of the Summary area, select the customer with which the contract is signed.
3. Check the location of the customer in the **Location** box.
4. In the **Project** box, select a particular project to which this service contract is related. (The non- project code is inserted by default.)
5. If a particular project is selected, in the **Default Project Task** box, select the default task for the project.
6. If needed, in the **Description** box, enter a brief description of the service contract.
7. On the **Summary** tab, in the **Contract Settings** section, do the following:
   1. In the **Start Date** box, select the start date when the service orders or appointments can be generated for this contract.
   2. If the contract expires on a certain date, in the **Expiration Type** box, select *Expiring*.
   3. If the contract has an expiration date, in the **Expiration Date** box, select the end date of the contract.
   4. In the **Schedule Generation Type** box, select the option to indicate whether service orders or appointments will be generated for the service contract.
   5. If a vendor (instead of the staff members of your company) performs the services associated with the service contract, in the **Vendor** box, select the vendor.
   6. If a particular salesperson sells the services of the contract to the customer, in the **Salesperson ID** box, specify the identifier of the salesperson who is assigned to the customer.
   7. If commission is paid to the salesperson, select the **Commissionable** check box.
8. On the **Summary** tab, in the **Billing Settings** section, do the following:
   1. In the **Branch** box, check the branch of your company that handles the service orders of the service contract, and change it if needed.
   2. In the **Branch Location** box, check the branch location of your company that handles the service orders of the service contract, and change it if needed.
   3. In the **Billing Type** box, select *End-Period Plus*.
   4. If the billing documents have to be sent to an email address other than the one specified for the customer, perform the following steps (otherwise, leave the default option in the **Bill To** box and leave the other boxes blank):
      1. In the **Bill To** box, select *Specific Account*.
      2. In the **Billing Customer** box, specify the customer account to which invoices have to be sent.
9. In the **Billing Location** box, make sure that the correct location (to which invoices must be sent) is selected, and change the location if needed. In the **Billing Type Settings** section, in the **Period** box, select the duration of the periods for which invoices will be generated (at the end of each period).
10. On the **Services per Period** tab, for each service or non-stock item you want to add, click **Add Row** and do the following:
    1. In the **Line Type** column, make sure the correct line type is selected (*Service* or *Non-Stock Item*), and change it if needed.
    2. In the **Inventory ID** column, select the identifier of the service or non-stock item you want to add to the prepaid contract.
    3. If needed, in the **Target Equipment ID** column, select the piece of target equipment associated with the service or non-stock item.
    4. In the **Billing Rule** column, check the billing rule related to the service or non-stock item, and change the rule if needed.
    5. In the **Value** column, check the quantity of the service or non-stock item, and change the quantity if needed.
    6. In the **Recurring Item Price** column, specify the price of the service or non-stock item that the customer prepays for in each period.
    7. In the **Overage Item Price** column, specify the price of the service or non-stock item that is paid by the customer if the quantity of the service or non-stock item is exceeded in the period.
11. On the form toolbar, click **Save**.

## To Create a Service Contract Billed at the Time of Service

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Customer** box of the Summary area, select the customer with which the contract is signed.
3. Check the location of the customer in the **Location** box, and change it if needed.
4. In the **Project** box, select a particular project to which this service contract is related. (The non- project code is inserted by default.)
5. If a particular project is selected, in the **Default Project Task** box, select the default task for the project.
6. If needed, in the **Description** box, enter a brief description of the service contract.
7. On the **Summary** tab, in the **Contract Settings** section, do the following:
   1. In the **Start Date** box, select the start date when the service orders or appointments can be generated for this contract.
   2. If the contract expires on a certain date, in the **Expiration Type** box, select *Expiring*.
   3. If the contract has an expiration date, in the **Expiration Date** box, select the expiration date of the contract.
   4. In the **Schedule Generation Type** box, select the option to indicate whether service orders or appointments will be generated for the service contract.
   5. If a vendor (instead of the staff members of your company) performs the services associated with the service contract, in the **Vendor** box, select the vendor.
   6. If a particular salesperson sells the services of the contract to the customer, in the **Salesperson ID** box, specify the identifier of the salesperson who is assigned to the customer.
   7. If commission is paid to the salesperson, select the **Commissionable** check box.
8. On the **Summary** tab, in the **Billing Settings** section, do the following:
   1. In the **Branch** box, check the branch of your company that handles the service orders of the service contract, and change it if needed.
   2. In the **Branch Location** box, check the branch location of your company that handles the service orders of the service contract, and change it if needed.
   3. In the **Billing Type** box, make sure that *At Time of Service* is selected.
   4. If the invoices have to be sent to an email address other than the one specified for the customer, perform the following steps (otherwise, leave the default option in the **Bill To** box and leave the other boxes blank):
      1. In the **Bill To** box, select *Specific Account*.
      2. In the **Billing Customer** box, specify the customer account to which invoices have to be sent.
      3. In the **Billing Location** box, make sure that the correct location (to which invoices must be sent) is selected, and change the location if needed.
9. In the **Billing Type Settings** section, in the **Take Prices From** box, select the source of the prices for each item in the contract as follows:

* To use for billing the regular sales prices specified in accounts receivable, select the *Regular Price* option.
* To use for billing the service prices and inventory item prices in the contract, select the

*Contract* option.

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

## To Create a Route Service Contract Billed at the Time of Service

1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Customer** box, select the customer with which the contract is signed.
3. Check the location of the customer in the **Location** box, and change it if needed.
4. In the **Project** box, select a particular project to which this service contract is related. (The non- project code is inserted by default.)
5. If a particular project is selected, in the **Default Project Task** box, select the default task for the project.
6. If needed, in the **Description** box, enter a brief description of the service contract.
7. On the **Summary** tab, in the **Contract Settings** section, do the following:
   1. In the **Start Date** box, select the start date when the service orders or appointments can be generated for this contract.
   2. If the contract expires on a certain date, in the **Expiration Type** box, select *Expiring*.
   3. If the contract has an expiration date, in the **Expiration Date** box, select the end date of the contract.
   4. If a vendor performs services associated with the service contract, in the **Vendor** box, select the vendor.
   5. If a particular salesperson sells services to the customer, in the **Salesperson ID** box, specify the salesperson who is assigned to the customer.
   6. If the commission is paid to the salesperson, select the **Commissionable** check box.
8. On the **Summary** tab, in the **Billing Settings** section, do the following:
   1. In the **Branch** box, check the branch of your company that handles the service orders of the service contract, and change it if needed.
   2. In the **Branch Location** box, check the branch location of your company that handles the service orders of the service contract, and change it if needed.
   3. In the **Billing Type** box, make sure that *At Time of Service* is selected.
   4. If the billing documents have to be sent to an email address other than the one specified for the customer, perform the following steps (otherwise, leave the default option in the **Bill To** box and leave the other boxes blank):
      1. In the **Bill To** box, select *Specific Account*.
      2. In the **Billing Customer** box, specify the customer account to which invoices have to be sent.
      3. In the **Billing Location** box, make sure that the correct location (to which invoices must be sent) is selected, and change the location if needed.
9. In the **Billing Type Settings** section, in the **Take Prices From** box, select the source of the prices for each item in the contract as follows:

* Select the *Regular Price* option to use for billing the regular sales prices specified in the accounts receivable functional area. Select the *Contract* option to use for billing the service prices and inventory item prices in the contract.

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

## To Create a Route Service Contract Billed at the End of the Period

1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Customer** box, select the customer with which the contract is signed.
3. Check the location of the customer in the **Location** box, and change it if needed.
4. In the **Project** box, select a particular project to which this service contract is related. (The non- project code is inserted by default.)
5. If a particular project is selected, in the **Default Project Task** box, select the default task for the project.
6. If needed, in the **Description** box, enter a brief description of the service contract.
7. On the **Summary** tab, in the **Contract Settings** section, do the following:
   1. In the **Start Date** box, select the start date when the service orders or appointments can be generated for this contract.
   2. If the contract expires on a certain date, in the **Expiration Type** box, select *Expiring*.
   3. If the contract has an expiration date, in the **Expiration Date** box, select the end date of the contract.
   4. In the **Schedule Generation Type** box, select the option to indicate whether appointments or no documents will be generated for the service contract.
   5. If a vendor performs services associated with the service contract, in the **Vendor** box, select the vendor.
   6. If a particular salesperson sells services to the customer, in the **Salesperson ID** box, specify the salesperson who is assigned to the customer.
   7. If the commission is paid to the salesperson, select the **Commissionable** check box.
8. On the **Summary** tab, in the **Billing Settings** section, do the following:
   1. In the **Branch** box, check the branch of your company that handles the service orders of the service contract, and change it if needed.
   2. In the **Branch Location** box, check the branch location of your company that handles the service orders of the service contract, and change it if needed.
   3. In the **Billing Type** box, select *End-Period Plus*.
   4. If the billing documents have to be sent to an email address other than the one specified for the customer, perform the following steps (otherwise, leave the default option in the **Bill To** box and leave the other boxes blank):
      1. In the **Bill To** box, select *Specific Account*.
      2. In the **Billing Customer** box, specify the customer account to which invoices have to be sent.
      3. In the **Billing Location** box, make sure that the correct location (to which invoices must be sent) is selected, and change the location if needed.
9. In the **Billing Type Settings** section, in the **Period** box, select the duration of the periods at the end of which invoices will be generated.
10. On the **Services per Period** tab, for each route service or non-stock item you want to add, click

**Add Row** and do the following:

* 1. In the **Line Type** column, make sure the correct line type is selected, and change it if needed.
  2. In the **Inventory ID** column, select the service or non-stock item you want to add to the prepaid contract.
  3. If needed, in the **Target Equipment ID** column, select the piece of target equipment associated with the service or non-stock item.
  4. In the **Billing Rule** column, check the billing rule related to the service or non-stock item, and change it if needed.
  5. In the **Value** column, check the value of the service or non-stock item, and change it if needed.
  6. In the **Recurring Item Price** column, specify the price of the service or non-stock item that the customer prepays in each period.
  7. In the **Overage Item Price** column, specify the price of the service or non-stock item that is paid by the customer if the amount of the service or non-stock item is exceeded in the period.

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

## To Add a Schedule

1. Open the [*Service Contract Schedules*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=f435f472-2bdd-4d76-9e41-08591b878f3a) (FS305100) form.
2. In the **Service Contract ID** box, select the service contract for which you want to create a schedule.

You can also open the particular service contract in the following way:

* 1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.
  2. In the **Service Contract ID** box, select the service contract for which you want to create a schedule.
  3. On the **Schedules** tab, click **Add Schedule**.

1. In the **Location** box, check the location for which you want to create a schedule, and change it if needed.
2. In the **Service Order Type** box, select the type of the service orders you want to associate with the contract.
3. If appointments are generated for the service contract, in the **Schedule Start Time** box, specify the time when the generated appointments are scheduled to start.
4. In the **Start Date** box, specify the date from which the schedule is generated.
5. If needed, in the **Expiration Date** box, specify the date until which the schedule can be generated.
6. If needed, on the **Details** tab, specify services to be performed and comments and instructions to the services as follows:

* Click **Add Row**.
* In the **Line Type** column, do the following:
  + To add to the schedule a service (that is, a non-stock item of the *Service* type), select

*Service*.

* + To add to the schedule a non-stock item of a type other than *Service*, select *Non-Stock Item*.
  + To add to the schedule a service template, select *Service Template*.
  + To add to the schedule a stock item, select *Inventory Item*.
  + To leave a comment on the services related to the schedule, select *Comment*.
  + To leave an instruction related to the schedule, select *Instruction*.
* If you have selected *Service* or *Non-Stock Item* in the **Line Type** column, do the following:
  + In the **Inventory ID** column, select the service to be performed according to the schedule.
  + Check the billing rule for the service in the **Billing Rule** column, and change it if needed.
  + Check the quantity of line items in the **Estimated Quantity** column, and change it if needed.
  + Check the estimated time for the line item in the **Estimated Duration** column, and change it if needed.
  + If needed, in the **Target Equipment ID** column, select the equipment for which the service is provided.
  + Check the description of the service or non-stock item in the **Transaction Description**

column, and change it if needed.

* If you have selected *Inventory Item* in the **Line Type** column, do the following:
  + In the **Inventory ID** column, select the stock item to be involved in the service contract schedule.
  + Check the quantity of line items in the **Estimated Quantity** column, and change it if needed.
  + If needed, in the **Equipment Action** column, select the action that is performed by a staff member.
  + If needed, in the **Target Equipment ID** column, select the equipment for which the service is provided.
  + Check the description of the stock item in the **Transaction Description** column, and change it if needed.
* If you have selected *Service Template* in the **Line Type** column, do the following:
  + In the **Service Template ID** column, select the service template that is performed according to the schedule.
  + Check the billing rule for the service in the **Billing Rule** column, and change it if needed.
  + Check the description of the service template in the **Transaction Description** column, and change it if needed.
* If you have selected *Comment* or *Instruction* in the **Line Type** column, in the **Transaction Description** column, enter the comment or instruction for the services related to the schedule.

1. On the **Recurrence** tab, do the following:
   1. Under **Frequency Settings**, select one of the following options:
      * If you want to repeat the schedule daily or every *x* days, click **Daily**.
      * If you want to repeat the schedule weekly or every *x* weeks, click **Weekly**.
      * If you want to repeat the schedule monthly or every *x* months, click **Monthly**.
      * If you want to repeat the schedule yearly or every *x* years, click **Yearly**.
   2. If you have selected the **Daily**, **Weekly**, or **Monthly** frequency type, and the **Season Settings** section is available, in the **Season Settings** section, clear the check boxes for the months when the schedule does not occur, if applicable. (By default, all the months are selected.)
   3. If you have selected the **Daily** frequency type, in the **Every** box of the **Daily Settings**

section, specify the integer that represents how often in days the schedule occurs.

* 1. If you have selected the **Weekly** frequency type, in the **Weekly Settings** section, do the following:
     + In the **Every** box, specify the integer that represents how often in weeks the schedule occurs.
     + Select the check boxes of the days of week when the recurrence is applied to the schedule rule.
  2. If you have selected the **Monthly** frequency type, in the **Monthly Settings** section, specify the following information:
     + In the **Every** box, select the integer that represents how often in months the schedule occurs.
     + If you want to specify the specific day of the month when the schedule occurs, select the

**Fixed Day of Month** option button, and specify the number of the day of the month.

* + - If you want to specify the week of the month and the day of the week when the schedule occurs, select the **Fixed Day of Week** option button, and specify the applicable week of the month and the day of the week.
  1. If you have selected the **Monthly** frequency type and you want to apply a second rule for the same month, select the **Monthly 2 Selected** check box in the **Second Recurrence Monthly Settings** section, and make your selections as described in Step 10.e above.
  2. If you have selected the **Monthly** frequency type and you want to apply a third rule for the same month, repeat Step 10.e in the **Third Recurrence Monthly Settings** section.
  3. If you have selected the **Monthly** frequency type and you want to apply a fourth rule for the same month, repeat Step 10.e in the **Fourth Recurrence Monthly Settings** section.

1. If you selected the **Yearly** frequency type, in the **Yearly Settings** section, do the following:
   * In the **Every** box, select the integer representing how often in years the schedule occurs.
   * Select the check boxes of the months when the schedule occurs.
   * If you want to specify the specific day of the month when the schedule occurs, select the

**Fixed Day of Month** option button and specify the number of the day of the month.

* + If you want to specify the week of the month and the day of the specific week when the schedule occurs, select the **Fixed Day of Week** option button, and specify the number of the week of the month and the day of the week.

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

## To Add a Route Schedule

1. Open to the [*Route Service Contract Schedules*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=648377cc-38b8-4711-a0e1-8182f337168c) (FS305600) form.
2. In the **Service Contract ID** box, select the service contract for which you want to create a schedule.

You can also open the particular route service contract in the following way:

* 1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.
  2. In the **Service Contract ID** box, select the service contract for which you want to create a schedule.
  3. On the **Schedules** tab, click **Add Schedule**.

1. In the **Location** box, check the customer location, and change it if needed.
2. In the **Service Order Type** box, select the type of the service orders you want to associate with the contract.
3. If needed, on the **Details** tab, add each line item by doing the following:

* Click **Add Row**.
* In the **Line Type** column, do the following:
  + To add to the schedule a service (that is, a non-stock item of the *Service* type), select

*Service*.

* + To add to the schedule a non-stock item of a type other than *Service*, select *Non-Stock Item*.
  + To add to the schedule a service template, select *Service Template*.
  + To add to the schedule a stock item, select *Inventory Item*.
  + To leave a comment on the services related to the schedule, select *Comment*.
  + To leave an instruction related to the schedule, select *Instruction*.
* If you have selected *Service* or *Non-Stock Item* in the **Line Type** column, do the following:
  + In the **Inventory ID** column, select the identifier of the service or non-stock item to be performed according to the schedule.
  + Check the billing rule for the service in the **Billing Rule** column, and change it if needed.
  + Check the estimated time for the line item in the **Estimated Duration** column, and change it if needed.
  + Check the quantity of the line item in the **Estimated Quantity** column, and change it if needed.
  + If needed, in the **Target Equipment ID** column, select the identifier of the equipment for which the line item is provided.
  + Check the description of the service or non-stock item in the **Transaction Description**

column, and change the description if needed.

* If you have selected *Inventory Item* in the **Line Type** column, do the following:
  + In the **Inventory ID** column, select the stock item to be involved in the service contract schedule.
  + Check the estimated quantity of line items in the **Estimated Quantity** column, and change it if needed.
  + If needed, in the **Target Equipment ID** column, select the equipment for which the service is provided.
  + Check the description of the stock item in the **Transaction Description** column, and change it if needed.
* If you have selected *Service Template* in the **Line Type** column, do the following:
  + In the **Service Template ID** column, select the service template, by its identifier, whose services are performed according to the schedule.
  + Check the billing rule for the service in the **Billing Rule** column, and change the rule if needed.
  + Check the description of the service template in the **Transaction Description** column, and change the description if needed.
  + If needed, in the **Target Equipment ID** column, select the identifier of the equipment for which the services are provided.
* If you have selected *Comment* or *Instruction* in the **Line Type** column, in the **Transaction Description** column, enter the comment or instruction for the services related to the schedule.

1. On the **Recurrence** tab, do the following:
   1. Under **Frequency Settings**, select one of the following options:
      * If you want to repeat the schedule daily or every *x* days, click **Daily**.
      * If you want to repeat the schedule weekly or every *x* weeks, click **Weekly**.
      * If you want to repeat the schedule monthly or every *x* months, click **Monthly**.
      * If you want to repeat the schedule annually or every *x* years, click **Yearly**.
   2. If you have selected the **Daily**, **Weekly**, or **Monthly** frequency type, and the **Season Settings** section is available, in the **Season Settings** section, clear the check boxes for the months when the schedule does not occur, if applicable. (By default, all the months are selected.)
   3. If you have selected the **Daily** frequency type, in the **Every** box of the **Daily Settings**

section, specify the integer that represents how often in days the schedule occurs.

* 1. If you have selected the **Weekly** frequency type, in the **Weekly Settings** section, do the following:
     + In the **Every** box, specify the integer that represents how often in weeks the schedule occurs.
     + Select the check boxes of the days of week when the recurrence is applied to the schedule.
  2. If you have selected the **Monthly** frequency type, in the **Monthly Settings** section, do the following:
     + In the **Every** box, select the integer that represents how often in months the schedule occurs.
     + If you want to specify the specific day of the month when the schedule occurs, select the

**Fixed Day of Month** option button, and specify the number of the day of the month.

* + - If you want to specify the week of the month and the day of the week when the schedule occurs, select the **Fixed Day of Week** option button, and specify the applicable week of the month and the day of the week.
  1. If you have selected the **Monthly** frequency type and you want to apply a second rule for the same month, select the **Monthly 2 Selected** check box in the **Second Recurrence Monthly Setting** section, and make your selections as described in substep.
  2. If you have selected the **Monthly** frequency type and you want to apply a third rule for the same month, repeat Step 11.e in the **Third Recurrence Monthly Setting** section.

1. If you have selected the **Monthly** frequency type and you want to apply a fourth rule for the same month, repeat Step 11.e in the **Fourth Recurrence Monthly Setting** section. If you have selected the **Yearly** frequency type, in the **Yearly Settings** section, do the following:
   * In the **Every** box, select the integer representing how often in years the schedule occurs.
   * Select the check boxes of the months when the schedule occurs.
   * If you want to specify the specific day of the month when the schedule occurs, select the

**Fixed Day of Month** option button, and specify the number of the day of the month.

* + If you want to specify the week of the month and the day of the specific week when the schedule occurs, select the **Fixed Day of Week** option button, and specify the number of the week of the month and the day of the week.

1. On the **Route** tab, in the **Route ID** box, select the route related to the schedule.
2. On the form toolbar, click **Save**.

## To Activate a Route Service Contract with the Draft Status

1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.
2. In the **Service Contract ID** box, select the contract you want to activate.
3. On the More menu (under **Processing**), click **Activate**. The system assigns the contract the *Active* status.

## To Activate a Service Contract with the Draft Status

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.
2. In the **Service Contract ID** box, select the contract you want to activate.
3. On the More menu (under **Processing**), click **Activate**. The system assigns the contract the *Active* status.

## To Activate a Route Service Contract with the Suspended Status

1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.
2. In the **Service Contract ID** box, select the contract you want to activate.
3. On the More menu (under **Processing**), click **Activate**. The **Activate Contract** dialog box opens.
4. In the **Activation Date** box of the dialog box, select the date since which the contract has to be activated.
5. If schedules have been applied to the contract, do the following for each schedule for which you want to change the default date since which the service orders or appointments can be generated:
   1. In the **Change Recurrence** column, select the check box.
   2. In the **Effective Recurrence Start Date** column, specify the date since which the service orders or appointments can be generated for the schedule.
6. Click **OK**.

The system assigns the contract the *Active* status.

## To Activate the Next Period for Contracts Billed at the End of the Period

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.
2. In the **Service Contract ID** box of the Summary area, select the contract for which you want to activate the period.
3. On the **Services per Period** tab, make sure that *Modify Upcoming Billing Period* is selected in the **Actions** box.
4. On the table toolbar, click **Activate Period**.

## To Activate a Service Contract with the Suspended Status

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.
2. In the **Service Contract ID** box, select the contract you want to activate.
3. On the More menu (under **Processing**), click **Activate**. The **Activate Contract** dialog box opens.
4. In the **Activation Date** box of the dialog box, select the date when the contract has to be activated.
5. If schedules have been applied to the contract, do the following for each schedule for which you want to change the default start date when the service orders or appointments can be generated:
   1. In the **Change Recurrence** column, select the check box.
   2. In the **Effective Recurrence Start Date** column, specify the start date when the service orders or appointments can be generated for the schedule.
6. Click **OK**.

## To Cancel a Route Service Contract

1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.
2. In the **Service Contract ID** box, select the contract you want to cancel.
3. On the More menu (under **Processing**), click **Cancel**. The **Terminate Contract** dialog box opens.
4. In the **Cancellation Date** box, select the date since which the contract has to be canceled and click **OK**.

The system assigns the contract the *Canceled* status

## To Cancel a Service Contract

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.
2. In the **Service Contract ID** box, select the contract you want to cancel.
3. On the More menu (under **Processing**), click **Cancel**. The **Terminate Contract** dialog box opens.
4. In the **Cancellation Date** box, select the starting date when the contract has to be canceled.
5. Click **OK**.

## To Suspend a Route Service Contract

1. Open the [*Route Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=9036b4a6-98fe-42dd-bf5d-f1808e6bb122) (FS300800) form.
2. In the **Service Contract ID** box, select the contract you want to suspend.
3. On the More menu (under **Processing**), click **Suspend**. The **Suspend Contract** dialog box opens.
4. In the **Suspension Date** box, select the date since which the contract has to be suspended.
5. Click **OK**.

The system assigns the contract the *Suspended* status.

## To Suspend a Service Contract

1. Open the [*Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=11932f17-56fe-4a4e-8b66-e839bb21f402) (FS305700) form.
2. In the **Service Contract ID** box, select the contract you want to suspend.
3. On the More menu (under **Processing**), click **Suspend**. The **Suspend Contract** dialog box opens.
4. In the **Suspension Date** box, select the starting date when the contract has to be suspended.
5. Click **OK**.

## To Update the Statuses of Multiple Contracts

1. Open the [*Process Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=0c365261-43a6-4805-860c-0bc6558267af) (FS501200) form.
2. In the **Action** box, select *Update to Upcoming Status*.
3. If needed, in the **Branch** box, select the branch of the service contracts whose status you want to update.
4. If needed, in the **Branch Location** box, select the branch location of the service contracts whose status you want to update.
5. If needed, in the **Customer** box, select the customer for which services are performed in the service contracts whose status you want to update.
6. If needed, in the **Service Contract ID** box, select the service contract whose status you want to update.
7. Do one of the following:
   * Click **Process All** to process all the listed service contracts.
   * Select the unlabeled check box in the row of each service contract whose status you want to update. Click **Process**.

## To Generate Service Orders or Appointments for a Service Contract

1. Open the [*Generate from Service Contracts*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=28585e20-4cfa-4235-bfda-a6e0ecb0d5a8) (FS500300) form.
2. If needed, in the **Filtering Option** section of the form, do any of the following:
   * In the **Customer** box, select the customer to generate service orders and appointments for a particular customer.
   * In the **Location** box, select the customer location to generate service orders and appointments for a particular customer location.
   * In the **Branch** box, select the branch to generate service orders and appointments for a particular branch.
   * In the **Branch Location** box, select the branch location to generate service orders and appointments for a particular branch location.
3. In the **Generate Up To** box of the **Generation Options** section, select the date through which you want to generate the schedules.
4. Do one of the following:
   * On the form toolbar click **Process All** to generate service orders and appointments for all listed schedules.
   * Select the unlabeled check box for each schedule you want to generate and, on the form toolbar, click **Process**.

# Tracking Customers' Equipment

This chapter contains instructions related to tracking of customers' equipment and warranties in Acumatica ERP.

## To Add Equipment

1. Open the [*Equipment*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=43b7c838-3051-4238-87db-e9b9c213894e) (FS205000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Equipment Type** box, select the type of the equipment you are creating.
3. Do the following:
   * If the equipment is owned by your company and used to perform services, select the

**Resource Equipment** check box.

* + If the equipment needs to be serviced by your company, select the **Target Equipment** check box.
  + If the equipment is owned and used by your company but currently it needs to be serviced by your company, select both check boxes.

1. If needed, in the **Serial Nbr.** box, enter the serial number of the equipment.
2. If needed, in the **Description** box, enter a brief description of the equipment.
3. Under **Owner**, do one of the following:
   * If your company is an owner of the equipment, select **Company**.
   * If a customer is an owner of the equipment, select **Customer** and specify the customer in the

**Customer** box.

1. If the equipment is placed at your company location, under **Location**, do the following:
   * In the **Branch** box, select the branch where the equipment is placed.
   * Check the **Branch Location** box, and change it if needed.
2. If the equipment is placed at customer location, under **Location**, do the following:
   * In the **Customer** box, select the customer at whose location the equipment is placed.
   * Check the **Location** box, and change it if needed.
3. On the form toolbar, click **Save**.

## To Add a Model Equipment Sale to a Service Order or Appointment

1. Navigate to the needed form by doing one of the following:
   * To add model equipment being sold directly to the service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21)

(FS300100) form.

* + To add model equipment being sold to the appointment, open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.

1. In the **Service Order Type** box, select the service order type related to the service order or appointment.
2. In the **Service Order Nbr.** or **Appointment Nbr.** box (depending on the form you are using), select the reference number of the needed service order or appointment.
3. On the **Details** tab, do the following for each model equipment entity being sold as part of the service order:
4. On the table toolbar, click **Add Row**.
5. In the **Line Type** column, make sure that *Inventory Item* is selected.
6. In the **Inventory ID** column, select the identifier of the stock item that is the model equipment being sold.
7. In the **Equipment Action** column, select *Selling Model Equipment*.
8. On the form toolbar, click **Save**.

## To Add a Sale of Optional Components to a Service Order or Appointment

1. Navigate to the needed form by doing one of the following:
   * To add optional components directly to the service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
   * To add optional components to the 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. In the **Service Order Nbr.** or **Appointment Nbr.** box (depending on the form you are using), select the reference number of the needed service order or appointment.
4. On the **Details** tab, do the following for each optional component being sold as part of the service order:
5. On the table toolbar, click **Add Row**.
6. In the **Line Type** column, make sure that *Inventory Item* is selected.
7. In the **Inventory ID** column, select the identifier of the stock item that is associated with the component.
8. In the **Equipment Action** column, select *Selling Optional Component*.
9. If the component is being added to a piece of target equipment, in the **Target Equipment ID** column, select the identifier of the target equipment.
10. If the component is being added to a piece of model equipment that is being sold within the same service order or appointment, in the **Model Equipment Ref. Nbr.** column, select the line reference number of the model equipment.
11. In the **Component ID** column, select the identifier of the component specified in the model equipment.
12. On the form toolbar, click **Save**.

## To Add Upgraded Components to a Service Order or Appointment

1. Navigate to the needed form by doing one of the following:
   * To add upgraded components directly to the service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
   * To add upgraded components to the 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. In the **Service Order Nbr.** or **Appointment Nbr.** box (depending on the form you are using), select the reference number of the needed service order or appointment.
4. On the **Details** tab, do the following for each component being replaced (upgraded):
5. On the table toolbar, click **Add Row**.
6. In the **Line Type** column, make sure that *Inventory Item* is selected.
7. In the **Inventory ID** column, select the identifier of the stock item that is associated with the component being upgraded.
8. In the **Equipment Action** column, select *Upgrading Component*.
9. In the **Model Equipment Ref. Nbr.** column, select the line reference number in the service order or appointment of the model equipment in which you want to upgrade a component.
10. In the **Component ID** column, select the identifier of the component being upgraded specified in the model equipment.
11. On the form toolbar, click **Save**.

## To Add Replacement Target Equipment to a Service Order or Appointment

1. Navigate to the needed form by doing one of the following:
   * To add replacement target equipment directly to the service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21)

(FS300100) form.

* + To add replacement target equipment to the appointment, open the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form.

1. In the **Service Order Type** box, select the service order type related to the service order or appointment.
2. In the **Service Order Nbr.** or **Appointment Nbr.** box (depending on the form you are using), select the reference number of the needed service order or appointment.
3. On the **Details** tab, do the following for each piece of target equipment that is being replaced:
4. On the table toolbar, click **Add Row**.
5. In the **Line Type** column, make sure that *Inventory Item* is selected.
6. In the **Inventory ID** column, select the identifier of the stock item that is the new model equipment replacing the target equipment.
7. In the **Equipment Action** column, select *Replacing Target Equipment*.
8. In the **Target Equipment ID** column, select the piece of target equipment that is being replaced.
9. On the form toolbar, click **Save**.

## To Replace Components in Target Equipment

1. Navigate to the needed form by doing one of the following:
   * To add replacement components to the service order, open the [*Service Orders*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=6e5277d3-274e-45f5-b77d-4410ed736d21) (FS300100) form.
   * To add replacement components to the 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. In the **Service Order Nbr.** or **Appointment Nbr.** box (depending on the form you are using), select the reference number of the needed service order or appointment.
4. On the **Details** tab, do the following for each component you want to replace:
5. On the table toolbar, click **Add Row**.
6. In the **Line Type** column, make sure that *Inventory Item* is selected.
7. In the **Inventory ID** column, select the identifier of the stock item that is a replacement component.
8. In the **Equipment Action** column, select *Replacing Component*.
9. In the **Target Equipment ID** column, select the target equipment whose component is being replaced.
10. In the **Component Ref. Nbr.** column, select the line reference number of the equipment component to be replaced in the target equipment.
11. On the form toolbar, click **Save**.

# Processing Routes

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

## To Create a Route

1. Open the [*Routes*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=174a8c81-a57a-41fa-b59e-0f043854a40c) (FS203700) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Route ID** box of the Summary area, type the identifier to be used for the route.
3. In the **Description** box, type a brief description of the route.
4. In the **Start Location** section, do the following:
   1. In the **Branch** box, select the branch that is related to the starting location of the route.
   2. In the **Branch Location** box, select the branch location that is related to the starting location of the route.
5. In the **End Location** section, do the following:
   1. In the **Branch** box, select the branch that is related to the ending location of the route.
   2. In the **Branch Location** box, select the branch location that is related to the ending location of the route.
6. On the **Execution** tab, specify the days when this route can be executed:
   1. In the **Day of Week** column, select the check boxes next to the days of week when the route can be executed.
   2. For each selected day of the week, in the **Start Time** column, select the earliest time when staff members can start executing this route.
   3. For each selected day of the week, in the **Nbr. Trip(s) per Day** column, specify the maximum number of times the route is executed during the day.
7. To be able to select drivers to execute a route, on the **Employees** tab, for each driver that can execute this route, do the following:
   1. On the table toolbar, click **Add Row**.
   2. In the **Employee ID** column, select the driver.
   3. In the **Priority Preference** box, select the priority of this driver to execute the route. The lower the digit, the higher the priority of the driver.
8. If needed, on the **Attributes** tab, for each attribute you want to add, perform the following steps:
   1. On the table toolbar, click **Add Row**.
   2. In the **Attribute ID** column, select an attribute that defines a characteristic related to executions of this route.
   3. If needed, in the **Sort Order** column, specify the order of the attribute for sorting in reports.
   4. If users must specify a value for the attribute for all executions of this route, select the

**Required** check box.

* 1. If needed, in the **Default Value** column, select the value.

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

## To Generate Route Appointments

1. Open the [*Generate Route Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=d8e31b4a-ec95-49a3-961c-ad02a84b3299) (FS500200) form.
2. If needed, in the **Route** box, select the route for which you want to generate appointments. If you leave this box blank, schedules for all routes are displayed on the form.
3. In the **Generation Options** section of the form, specify the date range for which you want the schedules to be displayed as follows:
   * In the **Generate From** box, select the start date of the range. By default, the current date is selected.
   * In the **Generate Up To** box, select the end date of the range. By default, the current date is selected.
4. Do one of the following:
   * On the form toolbar click **Process All** to generate appointments for all listed schedules.
   * On the **Schedules** tab, select the unlabeled check box for each schedule you want to generate, and on the form toolbar, click **Process** to generate appointments for only the schedules you select.

## To Create a Route Execution Manually

1. Open the [*Route Document Details*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=b26fcf32-359a-4ef3-97e4-ab697fcfcdb1) (FS304000) form.

To open the form for creating a new record, type the form ID in the Search box, and on the Search form, point at the form title and click **New** right of the title.

1. On the form toolbar, click **Add New Record**.
2. In the **Route** box, select the route for which you want to create the document.
3. If needed, if multiple trips are performed for the route on the specified date, in the **Trip Nbr.**

box, specify the number of the trip.

1. In the **Schedule Start Date** box, select the date and time when the route execution is going to be started.
2. In the Summary area, click the **Driver Selector** button.
3. In the **Driver Selector** dialog box, which opens, select the driver from the list of available drivers assigned to the route related to this route execution and click **Select Driver**.
4. In the Summary area, click the **Vehicle Selector** button.
5. In the **Vehicle Selector** dialog box, which opens, select the vehicle from the list of available vehicles and click **Select Vehicle**.
6. On the form toolbar, click **Save**.

## To Set Up a Route Sequence

1. Open the [*Route Sequences*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=7563ef07-350b-4138-8061-3c7a42753d50) (FS303800) form.
2. In the **Route** box, select the route for which you want to change the order of appointments.
3. In the table, in the **Order** column, specify a new order number for each appointment whose order you want to change.
4. On the form toolbar, click **Save**.

## To Change an Order of Appointments on the Route Document Details Form

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 for which you want to change the order.
3. On the **Appointments** tab, for each appointment whose position in the route execution you want to change do the following:
   1. Click the appointment.
   2. If you want to move the appointment up, click **Move Up**.
   3. If you want to move the appointment down, click **Move Down**.
4. On the form toolbar, click **Save**.

## To Change an Order of Appointments on the Routes on Map Form

1. Open the [*Routes on Map*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=552bd083-b7e4-4ee3-9270-7be6b7292a01) (FS300900) form.
2. In the **Date** box, select the date of the route execution.
3. In the **Routes** table, click the arrow button at the left of the route execution for which you want to change the order.
4. Drag the appointment you want to move and drop it at the position where you want it to be.

## To Reassign an Appointment to Another 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 to which the appointment is currently assigned.
3. On the **Appointments** tab, click the appointment that you want to reassign.
4. On the table toolbar, click **Reassign**
5. In the **Route Appointment Assignment** dialog box, which opens, do the following:
   1. In the **Route Date** box of the **Filter Options** section, specify the date for which you want to view route executions to which the appointment can be reassigned.
   2. If needed, in the **Route** box, select the route for which you want to view route executions.
   3. In the **Available Routes** table, click the line with the route execution to which you want to reassign the selected appointment.
   4. Click **Reassign to Current Route** button.

## To Add an Appointment to 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 to which you want to add the appointment.
3. On the table toolbar of the **Appointments** tab, click **Create New Appointment**.
4. In the **Select the Service Order Type for the New Appointment** dialog box, select a service order type with the *Route* behavior and click **Proceed**.
5. On the [*Appointments*](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=ac486e9c-f5df-4829-94f0-2df8821361a0) (FS300200) form, which opens, add the details of the appointment, and click

**Save & Close** on the form toolbar to save the appointment details and close this form.

## To Delete an Appointment from 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 to which the appointment is currently assigned.
3. On the **Appointments** tab, click the appointment that you want to delete.
4. On the table toolbar, click **Delete Appointment**.
5. In the **Confirm Unassign Appointment** dialog box, click **Yes**.

## To Cancel 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 cancel.
3. On the More menu (under **Processing**), click **Cancel**. The route execution gets the *Canceled* 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.