**Webinar – EU: Service Management** 

Anacarina Calvo

Field Service Product Manager



Collaborate • Innovate • Accelerate • Jan. 27 - Feb. 1 • Houston, TX

**#AcumaticaSummit** 



- End User Service Management
  - Day 1: Lessons 1 to 7
    - Service Order

- Appointment
- Calendar Board
- Creation from Customer and Cloning Appointment
- Creation from Opportunities
- Creation from Sales Order

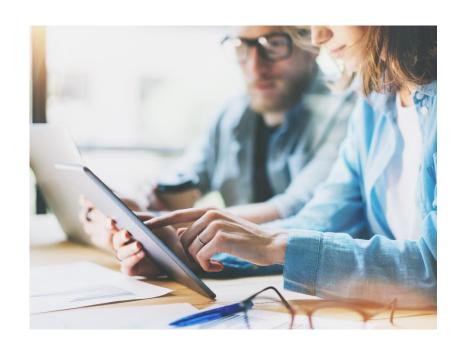
- Day 2: Lessons 8 to 15
  - Creation from Cases
  - Billing Cycles
  - Integration with Time and Expenses
  - Quick Process
  - Prepayments
  - Integration with Purchase Orders
  - Resource Equipment
  - Mobile App



#### Objectives

In this session, you will learn how to:

- Create Service Orders and Appointments
  - Starting from Calendar Board
  - Starting from Customer
  - Starting from Opportunities
  - Starting from Sales Order
- Schedule Appointments using skills, licenses and availability







### Objectives

In this session, you will learn how to:

- Configure Billing Cycles
- Use actions like:
  - Clone Appointment
  - Quick Process
  - Creation of Prepayments
- Integrate with Time & Expenses
- Create of Purchase Orders



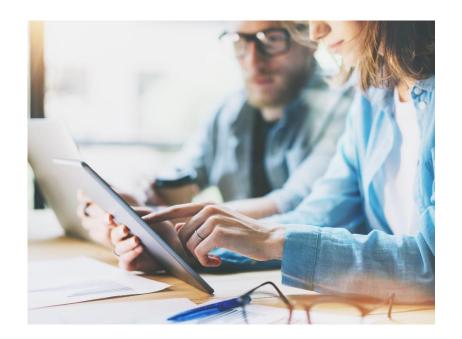




Objectives

In this session, you will learn how to:

- Schedule Resource Equipment
- Use mobile app to perform appointment's actions





Timing

**Monday**; **April 29**, **2019** 

12:00 PM – 2:00 PM (ET time)

Tuesday; April 30, 2019

12:00 PM – 02:00 PM (ET time)





#### Session Rules

- Dynamics of the Training:
  - Lesson's Step will be shown and explained
  - Questions can be written on the chat
  - Recording and Snapshots next day
- Questions after the Training:
  - Email: acalvo@acumatica.com
  - Skype: anacarinacalvo
- Have fun! ©







## **Training Steps**



### **Company Story**

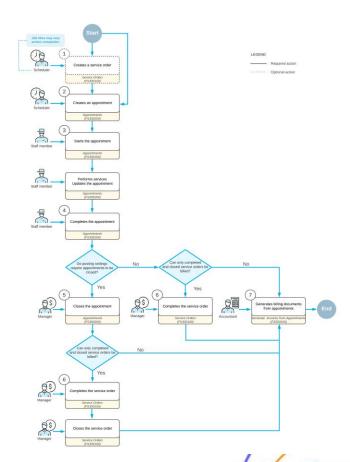
- SweetLife Fruits & Jams
  - SweetLife Office and Wholesale Center
  - SweetLife Store
  - Service and Equipment Sale Center



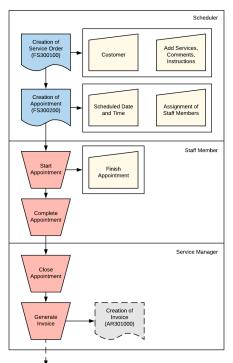


### Overview

- Service Order
- Appointment
- SM Process
- Calendar Board
- Service Order Types
- Billing Options
- Behavior Types



- Service Management Process from beginning to end
- Start from Service Order creation
  - Add a Service and a Comment
  - Add Staff Members
- End with Invoice generation



- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of TRN that generates AR Invoices
- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by App
- Customer (AR303000) forms, setup HMBAKERY with AP AP Billing Cycle



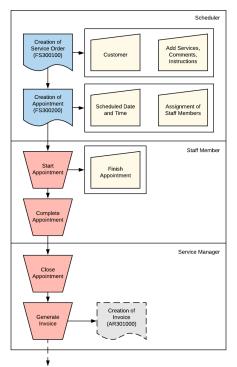


- Non-Stock Items (IN202000) form:
  - Creation of *TRAINING*, of billing rule Time rate
  - Creation of INSTALL, of billing rule Flat rate
- Employees (EP203000) form:
  - Setup EP00000002 (Todd Bloom) as Staff Member
  - Setup EP00000004 (Alberto Jimenez) as Staff Member

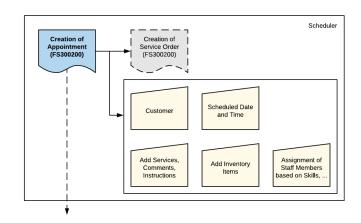




- Service Management Process from beginning to end
- Start from Service Order creation
  - Add a Service and a Comment
  - Add Staff Members
- End with Invoice generation



- Start from Appointment creation
  - Add Service through Service Selector
  - Add Inventory Items
  - Assign Staff Members based on:
    - Skills





- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of *INST* that generates Sales Orders
- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by App
- Customer (AR303000) forms, setup GOODFOOD with AP AP Billing Cycle



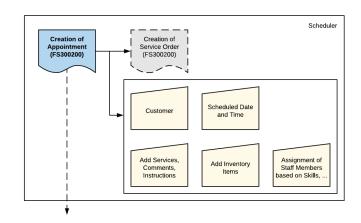


- Skills (FS200600) form:
  - Creation of INSTALLING
- Non-Stock Items (IN202000) forms:
  - Creation of INSTALL, of billing rule Flat rate, setup INSTALLING as skill
- Employees (EP203000) form:
  - Setup EP00000003 (Jon Waite) as Staff Member and INSTALLING as skill
- Stock Item (IN202500) forms:
  - Creation of JUICER15, Items available on Receipt (IN301000), etc.



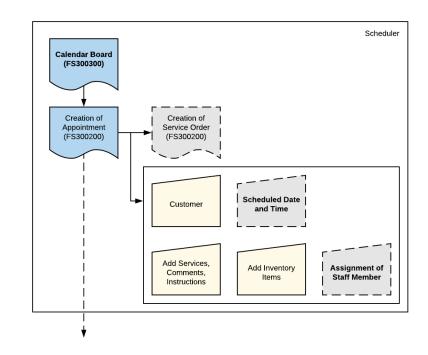


- Start from Appointment creation
  - Add Service through Service Selector
  - Add Inventory Items
  - Assign Staff Members based on:
    - Skills





- Start from Appointment creation on the Calendar Board
  - Assign Staff Members based on:
    - Availability
    - Skills
    - License
    - Service Area







- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of MRO that generates Sales Orders and setup as default SOType
- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by App
- Customer (AR303000) forms, setup GOODFOOD with AP AP Billing Cycle





- Skills (FS200600) form:
  - Creation of INSTALLING
  - Creation of REPAIRING
- License Type (FS200900) form:
  - Creation of INST&REP
- Non-Stock Items (IN202000) form:
  - Creation of REPAIR, of billing rule Flat rate; setup REPAIRING as skills and INST&REP as license



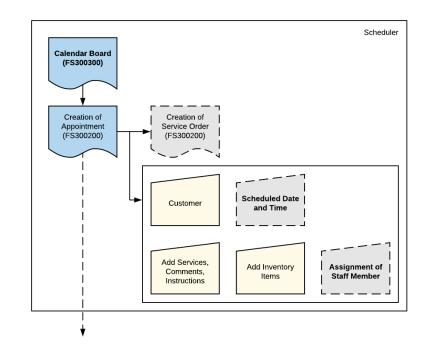


- Service Area (FS201900) form:
  - Creation of MANHATTAN with zipcodes
- Employees (EP203000) form:
  - Setup EP00000003 (Jon Waite) as Staff Member; INSTALLING and REPARING as skills; license of INST&REP; and MANHATTAN as Service Area.
  - Setup EP00000004 (Alberto Jimenez) as Staff Member; REPARING as skill; license of INST&REP; and MANHATTAN as Service Area.



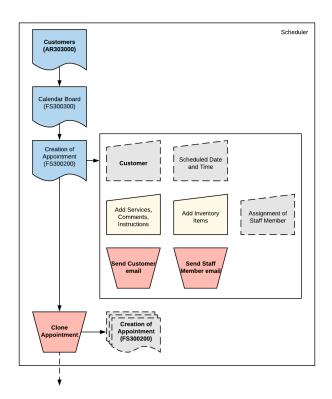


- Start from Appointment creation on the Calendar Board
  - Assign Staff Members based on:
    - Availability
    - Skills
    - License
    - Service Area





- Start from Customer to create an Appointment, using the Calendar Board
  - Send Notification emails
  - Clone Appointment







- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of MRO that generates Sales Orders and setup as default SOType
- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by App





- Customer (AR303000) forms, setup HBAKERY with AP AP Billing Cycle, allow Appointment Notifications
- Skills (FS200600) form:
  - Creation of REPAIRING
- License Type (FS200900) form:
  - Creation of INST&REP
- Non-Stock Items (IN202000) form:
  - Creation of REPAIR, of billing rule Flat rate; setup REPAIRING as skills and INST&REP as license



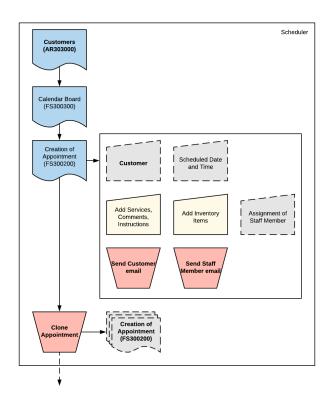


- Employees (EP203000) form:
  - Setup EP00000003 (Jon Waite) as Staff Member; INSTALLING and REPARING as skills; license of INST&REP; and allow Appointment Notifications





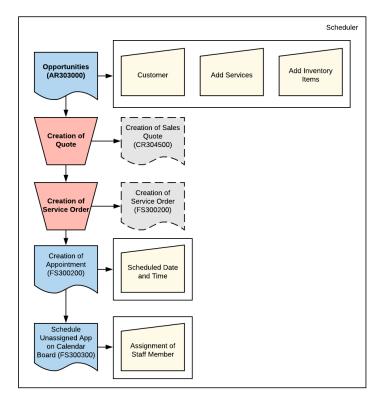
- Start from Customer to create an Appointment, using the Calendar Board
  - Send Notification emails
  - Clone Appointment







- Start from Opportunity
  - Create an Sales Quote
  - Create a Service Order
  - Creation of an Unassigned Appointment
  - Schedule Unassigned Appointment on the Calendar Board



- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of INST that generates Sales Orders and setup as default SOType
- Billing Cycle (FS206000) form:
  - Creation of AP SO that generates from App /groups by SrvOrd
- Customer (AR303000) form, setup TOMYUM with AP SO Billing Cycle



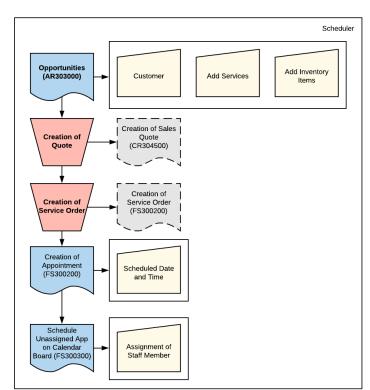


- Non-Stock Items (IN202000) form:
  - Creation of INSTALL, of billing rule Flat rate
- Stock Item (IN202500) form:
  - Creation of JUICER15, Items available on Receipt (IN301000), etc.
- Employees (EP203000) form:
  - Setup EP00000003 (Jon Waite) as Staff Member



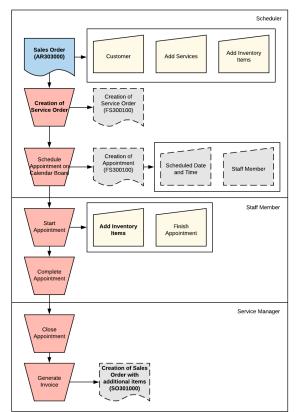


- Start from Opportunity
  - Create an Sales Quote
  - Create a Service Order
  - Creation of an Unassigned Appointment
  - Schedule Unassigned Appointment on the Calendar Board



## Lesson 6: Creating a Service Order from a Sales Order

- Start from Sales Order
  - Create a Service Order
  - Generate invoice for Additional Items



## Lesson 6: Creating a Service Order from a Sales Order

- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of INST that generates Sales Orders and setup as default SOType
- Billing Cycle (FS206000) form:
  - Creation of AP AP that generates/groups by App
- Customer (AR303000) form, setup GOODFOOD with AP AP Billing Cycle





## Lesson 6: Creating a Service Order from a Sales Order

- Skills (FS200600) form:
  - Creation of INSTALLING
- License Type (FS200900) form:
  - Creation of INST&REP
- Non-Stock Items (IN202000) form:
  - Creation of INSTALL, of billing rule Flat rate; setup INSTALLING as skill and INST&REP as license





## Lesson 6: Creating a Service Order from a Sales Order

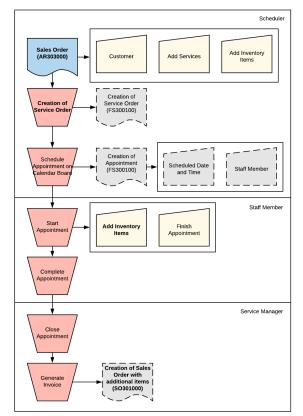
- Stock Item (IN202500) form:
  - Creation of JUICER15 with Items available on Receipt (IN301000), etc.
  - Creation of CONTAINER with Items available on Receipt (IN301000), etc.
- Employees (EP203000) form:
  - Setup EP00000003 (Jon Waite) as Staff Member setup INSTALLING as skill and INST&REP as license
- Order Types (SO201000) form:
  - Enable IN and SO types with Field Service Integration





## Lesson 6: Creating a Service Order from a Sales Order

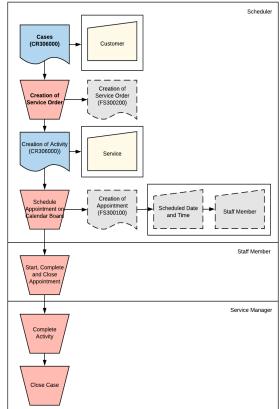
- Start from Sales Order
  - Create a Service Order
  - Generate invoice for Additional Items



## Day 2



- Start from Case
  - Create a Service Order
  - Add a Service through an Activity



- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of MRO that generates Sales Orders and setup as default SOType
- Billing Cycle (FS206000) form:
  - Creation of SO SO that generates/groups by SrvOrd
- Customer (AR303000) form, setup TOMYUM with AP SO Billing Cycle

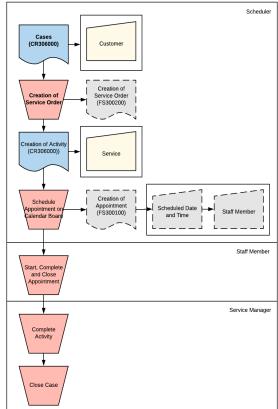




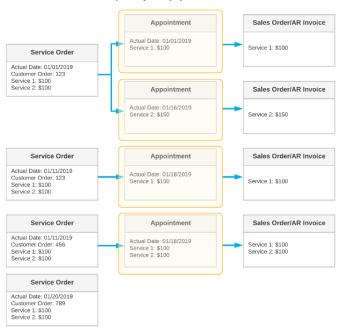
- Employees (EP203000) form:
  - Setup EP00000004 (Alberto Jimenez) as Staff Member



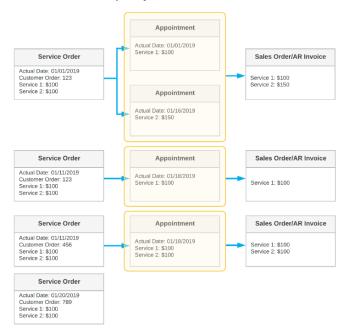
- Start from Case
  - Create a Service Order
  - Add a Service through an Activity



## Generate From Appointments Group By Appointments



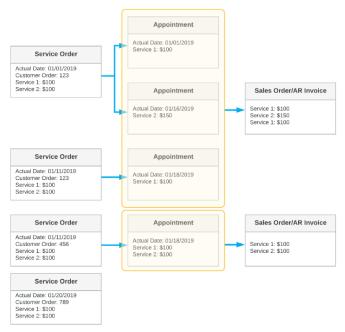
#### Generate From Appointments Group By Service Orders





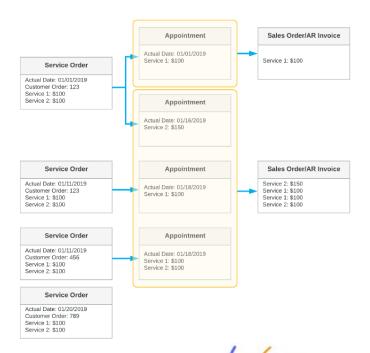


## Generate From Appointments Group By Customer Order/External Ref

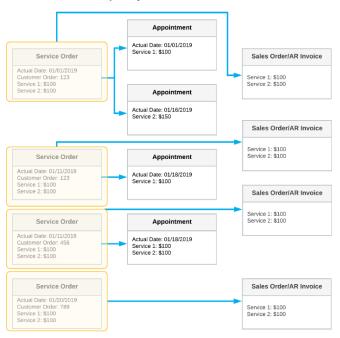


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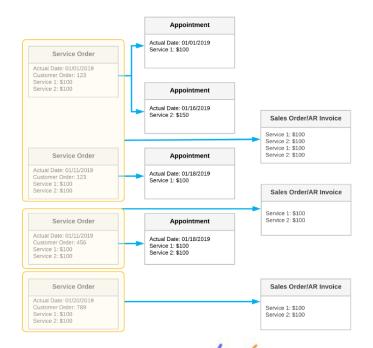
#### Generate From Appointments Group By Time Frame (15<sup>th</sup>)



## Generate From Service Orders Group By Service Orders



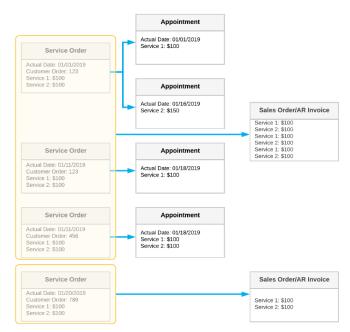
#### Generate From Service Order Customer Order/External Ref



#AcumaticaSummit



#### Generate From Service Orders Group By Time Frame (15th)







Objective

 Generate Invoices for multiple Appointments with different Billing Cycles





- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of INST that generates Sales Orders and setup as default SOType





- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by App
  - Creation of AP MONDAY that generates from App /groups by Time Frame
  - Creation of AP SO that generates from App /groups by SrvOrd
- Customer (AR303000) form:
  - Setup GOODFOOD with AP AP Billing Cycle
  - Setup RETSALE with AP MONDAY Billing Cycle
  - Setup TOMYUM with AP SO Billing Cycle





- Order Types (SO201000) form:
  - Enable IN type with Field Service Integration
  - Enable SO type with Field Service Integration





Objective

 Generate Invoices for multiple Appointments with different Billing Cycles





### Recording Staff Times in Time Activities

Actual Start Time of the appointment 07:00 AM

Actual Start Time of Service 1 07:00 AM

Actual End Time of Service 1 08:00 AM

Time not recorded to a service (30 minutes)

Actual End Time of the appointment 08:30 AM

**Appointment's Actual Duration: 1h, 00m** 





### Recording Staff Times in Time Activities

Actual Start Time of the appointment 07:00 AM

Actual Start Time of Service 1 ??:?? AM

Actual End Time of Service 1 ??:?? AM

Time not recorded to a service (30 minutes)

Actual End Time of the appointment 08:30 AM

**Appointment's Actual Duration: 1h, 00m** 





### Recording Staff Times in Time Activities

**Actual Start Time of the appointment** 07:00 AM **Actual Start Time of Service 1** 07:00 AM Actual Duration of Service 1: 1h, 00m **Actual End Time of Service 1** 08:00 AM Appointment **Actual Start Time of Service 2** 07:00 AM **Actual Duration of** took 1h, 30m Service 2: 1h, 00m Actual End Time of Service 2 08:00 AM Time not recorded to a service (30 minutes) **Actual End Time of the appointment** 08:30 AM

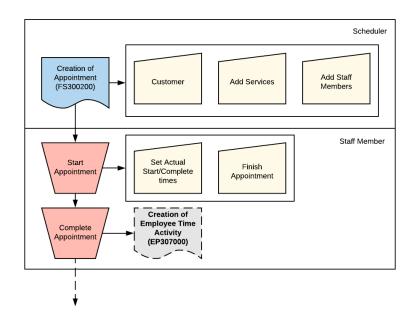
**Appointment's Actual Duration: 2h, 00m** 





### Lesson 9: Recording the Appointment Staff Time

- Record Time on the Appointment
  - Employee not associated to any service







### Lesson 9: Recording the Appointment Staff Time

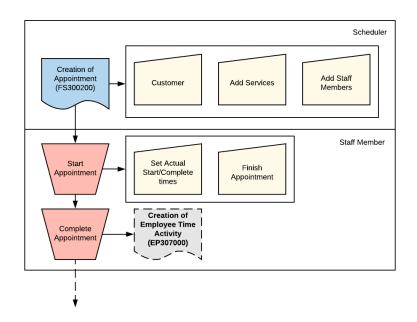
- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form:
  - Enable Time and Expense integration
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of TRN that generates AR and Time and Expenses setup
- Employees (EP203000) form:
  - Setup EP00000002 (Todd Bloom) as Staff Member





### Lesson 9: Recording the Appointment Staff Time

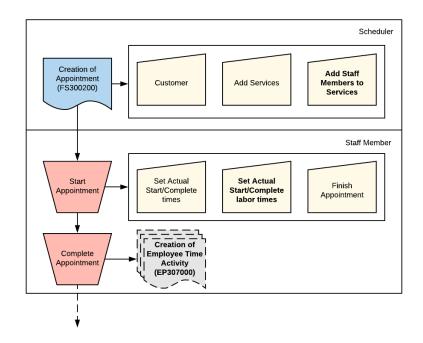
- Record Time on the Appointment
  - Employee not associated to any service







- Record Time on the Appointment
  - Employee associated to a service







- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form:
  - Enable Time and Expense integration
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of INST that generates SO and Time and Expenses setup



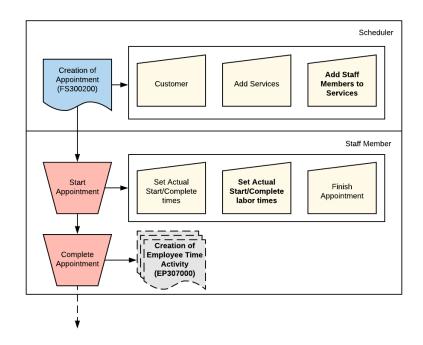


- Employees (EP203000) form:
  - Setup EP00000002 (Todd Bloom) as Staff Member
  - Setup EP00000003 (Jon Waite) as Staff Member





- Record Time on the Appointment
  - Employee associated to a service

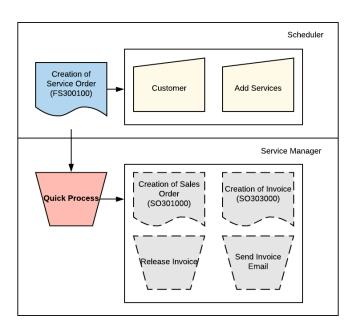






#### Objective

 Quick Process on the Service Order form







- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form:
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of MRO that generates SO, enable Allow Quick Process and setup Quick Process tab
- Billing Cycle (FS206000) form:
  - Creation of SO SO that generates/groups by App





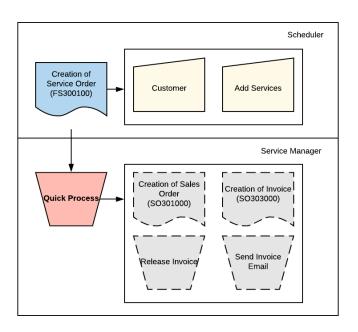
- Customer (AR303000), setup COFFEESHOP with SO SO Billing Cycle
- Non-Stock Items (IN202000) form:
  - Creation of REPAIR, of billing rule Flat rate;
- Order Types (SO201000) form, Enable IN type with Field Service Integration





### Objective

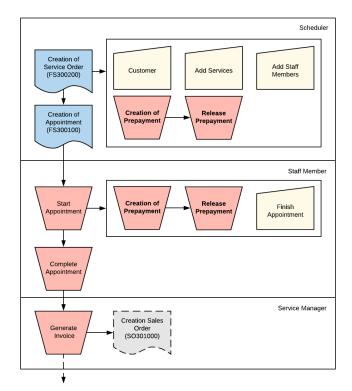
 Quick Process on the Service Order form







- Creation of a Prepayment on the Service Order
- Creation of a Prepayment on the Appointment
- Generation of Sales Order



- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of INST that generates SO
- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by App
- Customer (AR303000), setup GOODFOOD with AP AP Billing Cycle



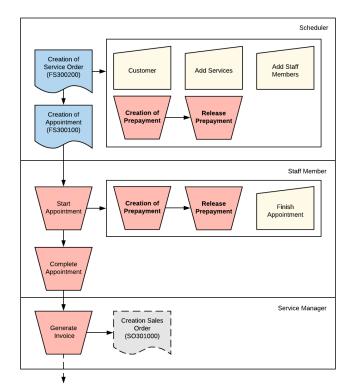


- Employees (EP203000) form:
  - Setup EP00000004 (Alberto Jimenez) as Staff Member
- Non-Stock Items (IN202000) form:
  - Creation of INSTALL, of billing rule Flat rate;
- Stock Item (IN202500) form:
  - Creation of JUICER20C, Items available on Receipt (IN301000), etc.
- Order Types (SO201000) forms, Enable IN type with Field Service Integration
- Cash Accounts (CA202000), 10300 is assigned to the branch.



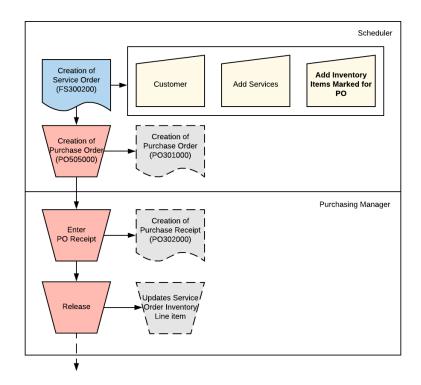


- Creation of a Prepayment on the Service Order
- Creation of a Prepayment on the Appointment
- Generation of Sales Order



## Lesson 13: Processing Service Orders with Items to Be Purchased

- On Service Order, Mark item for PO
- Creation of a Purchase Order from a Service Order
- Creation of Purchase Receipt



## Lesson 13: Processing Service Orders with Items to Be Purchased

- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of INST that generates SO
- Billing Cycle (FS206000) form:
  - Creation of SO SO that generates/groups by Service Order
- Customer (AR303000), setup COFFEESHOP with SO SO Billing Cycle





# Lesson 13: Processing Service Orders with Items to Be Purchased

- Employees (EP203000) form:
  - Setup EP00000004 (Alberto Jimenez) as Staff Member
- Non-Stock Items (IN202000) form:
  - Creation of INSTALL, of billing rule Flat rate;
- Stock Item (IN202500) form:
  - Creation of JUICER05
- Vendor (AP303000) form, creation of SQUEEZO

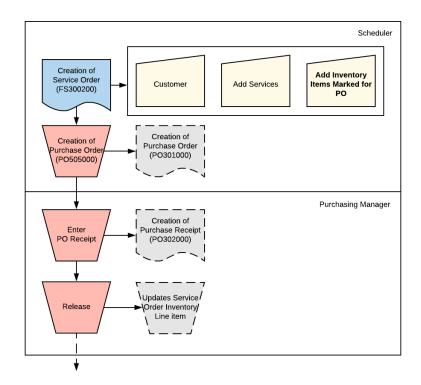




# Lesson 13: Processing Service Orders with Items to Be Purchased

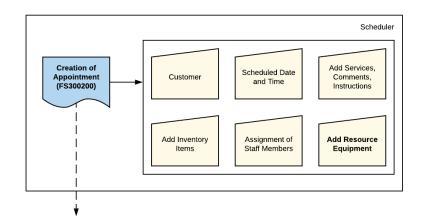
### Objective

- On Service Order, Mark item for PO
- Creation of a Purchase Order from a Service Order
- Creation of Purchase Receipt



### Objective

 Assignment of Resource Equipment to an Appointment





- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of MRO that generates SO
- Billing Cycle (FS206000) form:
  - Creation of SO SO that generates/groups by Service Order
- Customer (AR303000), setup COFFEESHOP with SO SO Billing Cycle





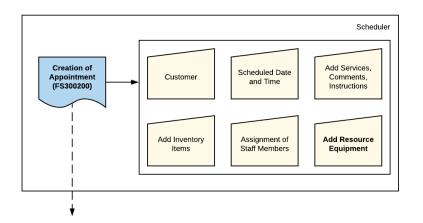
- Non-Stock Items (IN202000) form:
  - Creation of REPAIR, of billing rule Flat rate;
- Equipment Type (FS200800) form, creation of SCREWDRIVER
- Equipment (FS205000) form, creation of FSE00001 Vissko Screwdriver Set resource equipment





### Objective

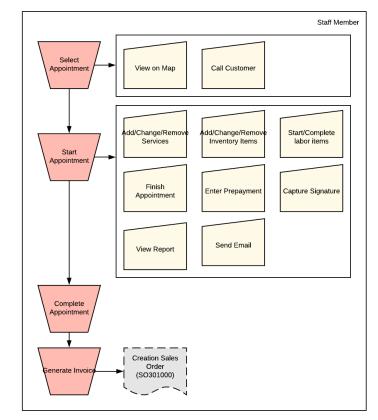
 Assignment of Resource Equipment to an Appointment





### Objective

- Process Appointment using the mobile app
  - Start Appointment
  - View On Map
  - Add Inventory Item
  - Start/Complete labor hours
  - Enter Prepayment
  - Gather Customer Signature
  - Complete Appointment
  - Generate Invoice







- Enable/Disable Features (CS100000) form
- Service Management Preferences (FS100100) form
- Branch Location (FS202500) form, Creation of WEST BRIGHTON
- Service Order Type (FS202300) form:
  - Creation of MRO that generates SO
- Billing Cycle (FS206000) form:
  - Creation of APAP that generates/groups by Appointment
- Customer (AR303000), setup GOODFOOD with AP AP Billing Cycle





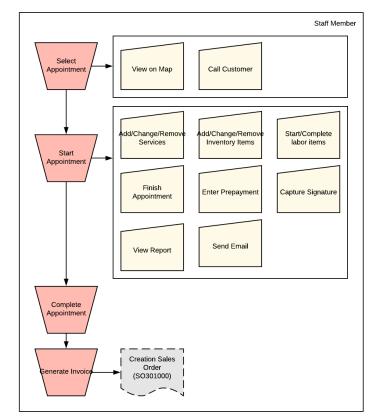
- Employees (EP203000) form:
  - Setup EP00000004 (Alberto Jimenez) as Staff Member
- Non-Stock Items (IN202000) form:
  - Creation of REPAIR, of billing rule Flat rate
- Stock Item (IN202500) form:
  - Creation of BLADE20, Items available on Receipt (IN301000), etc.





### Objective

- Process Appointment using the mobile app
  - Start Appointment
  - View On Map
  - Add Inventory Item
  - Start/Complete labor hours
  - Enter Prepayment
  - Gather Customer Signature
  - Complete Appointment
  - Generate Invoice







### **Objectives**

#### You have learned how to:

- Create Service Orders and Appointments
  - Starting from Calendar Board
  - Starting from Customer
  - Starting from Opportunities
  - Starting from Sales Order
- Schedule Appointments using skills, licenses and availability







### **Objectives**

#### You have learned how to:

- Configure Billing Cycles
- Use actions like:
  - Clone Appointment
  - Quick Process
  - Creation of Prepayments
- Integrate with Time & Expenses
- Create of Purchase Orders



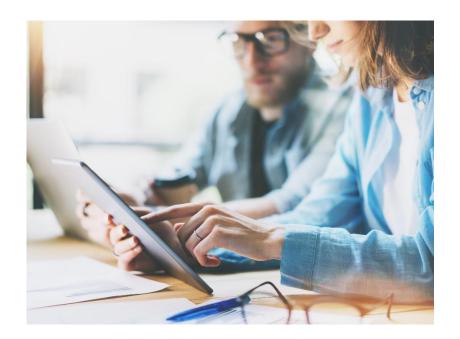




### **Objectives**

#### You have learned how to:

- Schedule Resource Equipment
- Use mobile app to perform appointment's actions





# **Thank You**



### Survey

Please give us your feedback:

https://www.surveymonkey.com/r/onlinesessions2019





### **Anacarina Calvo**

Email: acalvo@acumatica.com

Skype: anacarinacalvo





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