Acumatica
Summit 2018

Jan. 28 – Feb. 2 • Nashville, TN

V150 Field Services: Advanced (online)

Anacarina Calvo

Field Service Product Manager

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Collaborate. Innovate. Accelerate

Agenda

- V150 – Field Service Management: Advanced
  - Day 1:
    - Part 1 Equipment Management Lesson: 1, 2, 3
  - Day 2:
    - Part 1 Equipment Management: Lesson 3, 4
    - Part 2 Route Management: Overview
  - Day 3:
    - Part 2 Route Management: Lesson 5, 6, 7
    - Part 3 Mobile App

Objectives

- You will learn how to:
  - Keep track of your customer´s equipment ítems
  - Create service contracts to do recurring visits to your customers
  - Manage your company´s routes

Timing

3 days Online Course:

- Mon, Oct 22, 2018 9:00 AM – 11:00 AM PDT
- Tue, Oct 23, 2018 9:00 AM – 11:00 AM PDT
- Wed, Oct 24, 2018 9:00 AM – 11:00 AM PDT

Session Rules

- Dynamics during the Training:
  - Lesson's Step will be shown and explained
  - Questions can be written on the chat
  - Polling questions (CPE certificate)
  - Recording and Snapshots after each day
- Questions after the Training:
  - Email: acalvo@acumatica.com
  - Skype: anacarinacalvo
- Have fun! ☺

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Day 1

Part 1 Equipment Management Lesson: 1, 2, 3

Part 1 Equipment Management

Part 1 – Equipment Management

- Create Manufacturers
- Create item class for Model Equipment and components
- Create model equipment
- Create target equipment
- Use different Target Equipment actions
- Managing Service contracts

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Lesson 1 – Introduction to Equipment Management

- Enable the Equipment Management feature
- Perform minimum required configuration for the Equipment Management module

Lesson 1 – Introduction to Equipment Management

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

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Lesson 1 – Introduction to Equipment Management

POLL #1:

In Acumatica ERP, equipment that a company performs particular services upon, such as repair and maintenance is called…

- Model equipment
- Target equipment
- Resource equipment

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Lesson 1 – Introduction to Equipment Management

- Enable the Equipment Management feature
- Perform minimum required configuration for the Equipment Management module

Lesson 2 – Managing Model Equipment

- Create manufacturer
- Create item class for model equipment
- Create item class for component
- Create model equipment entity without components
- Create model equipment entity with components

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Lesson 2 – Managing Model Equipment

- Model Equipment
- Component
- Consumable
- Part or Other Inventory

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Lesson 2 – Managing Model Equipment

POLL #2:

On the Item Classes form, which of the following classes will you select to track the warranty of the stock item?

- Part or Other Inventory Item
- Model Equipment
- Component
- Consumable

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Lesson 2 – Managing Model Equipment

- Company Warranty vs Vendor Warranty

CW - 2 years

VW – 6 m

CW

VW – 18 m

CW – 6 m

VW

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Lesson 2 – Managing Model Equipment

POLL #3:

Which of the followings will you select for a stock item to specify the warranty that your company provides to the customer?

- Company Warranty
- Vendor Warranty

Lesson 2 – Managing Model Equipment

- Create manufacturer
- Create item class for model equipment
- Create item class for component
- Create model equipment entity without components
- Create model equipment entity with components

Lesson 3 – Managing Target Equipment

- Create a target equipment from a sales order and manually
- Perform appointment to a target equipment
- Perform actions upon Target Equipment items
  - Selling Model Equipment
  - Selling Optional Component
  - Upgrading Component
  - Replacing Target Equipment
  - Replacing Component

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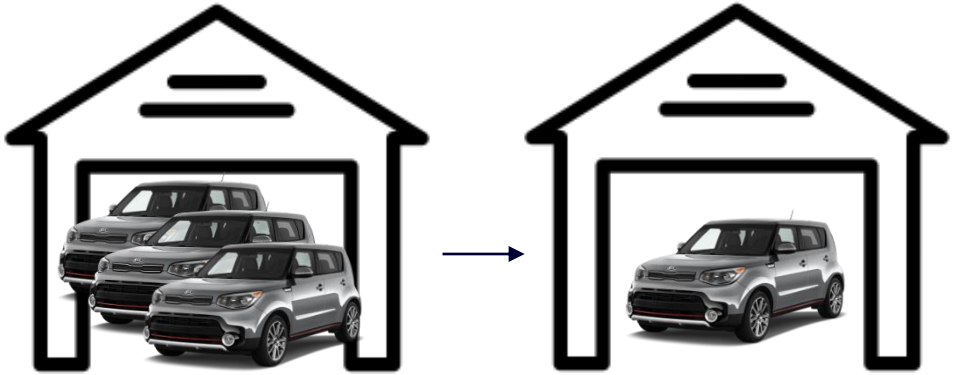
Lesson 3 – Managing Target Equipment

- Model Equipment
- Target Equipment



Inventory –
Stock Item (Model Equipment)

Customer Location –
Equipment (Target Equipment)

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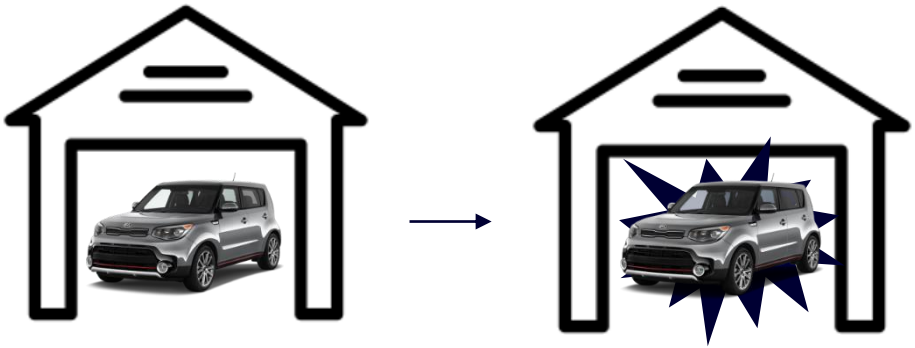
Lesson 3 – Managing Target Equipment

- Action > Selling Model Equipment



Stock Item (Model Equipment)

Creates Target Equipment

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Lesson 3 – Managing Target Equipment

- Create Target Equipment Manually

Target Equipment

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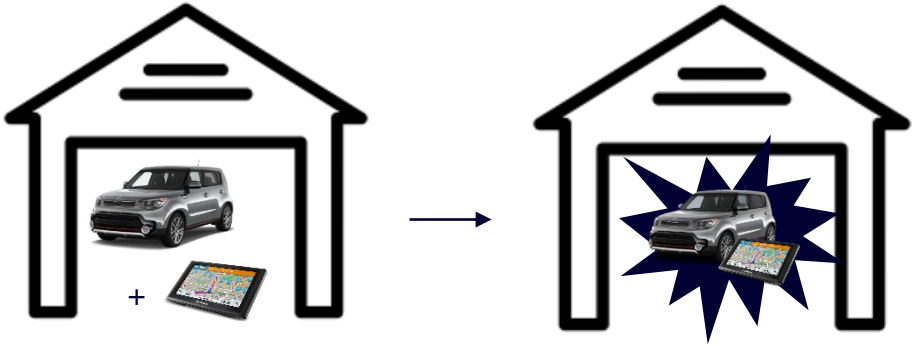
Day 2

Part 1 Equipment Management Lesson: 3, 4
Part 2 Route Management: Overview

Lesson 3 – Managing Target Equipment

- Action > Selling Optional Component



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

Creates Target Equipment

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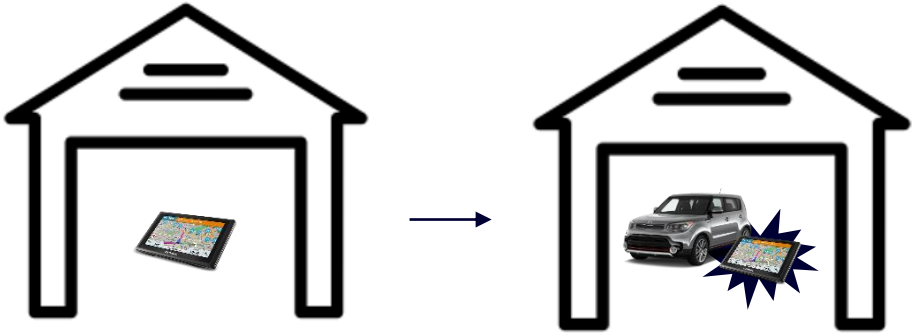
Lesson 3 – Managing Target Equipment

- Action > Selling Optional Component



Stock Item (Component)

Updates Target Equipment:
Adds New Component

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Lesson 3 – Managing Target Equipment

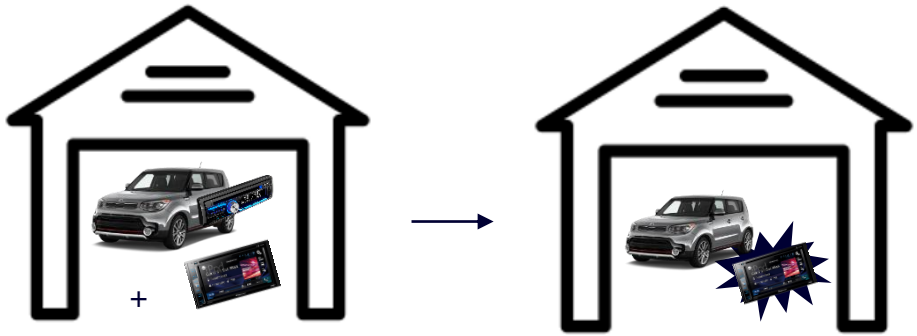
POLL #4:

Which of the following do you perform if you want to add an optional component on the Appointments form?

- Select Selling Model Equipment
- Select Selling Optional Component
- Specify the related model equipment
- Select the ID of the equipment component

Lesson 3 – Managing Target Equipment

- Action > Upgrading Component



Stock Item (Component)

Creates Target Equipment

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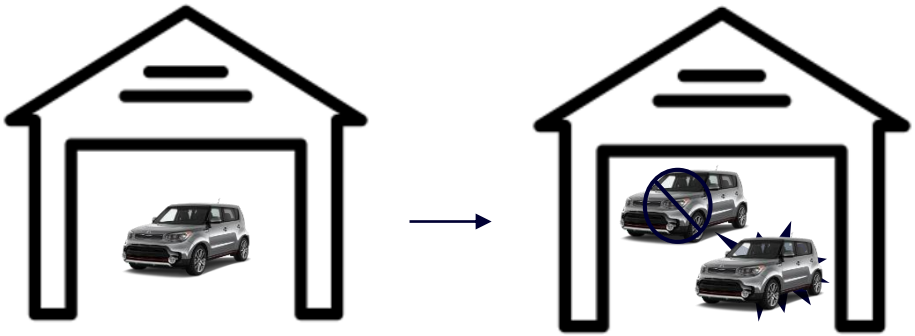
Lesson 3 – Managing Target Equipment

- Action > Replacing Target Equipment



Stock Item (Target Equipment)

Discards Target Equipment +
Create Target Equipment

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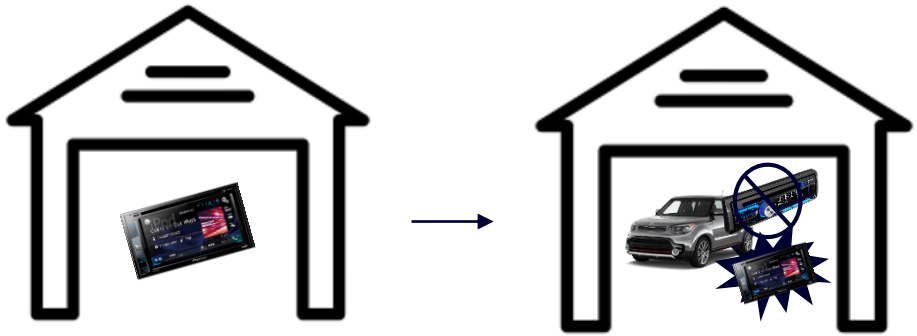
Lesson 3 – Managing Target Equipment

- Action > Replacing Component



Stock Item (Component)

Updates Target Equipment:
Discards Old Component +
Adds New Component

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Lesson 3 – Managing Target Equipment

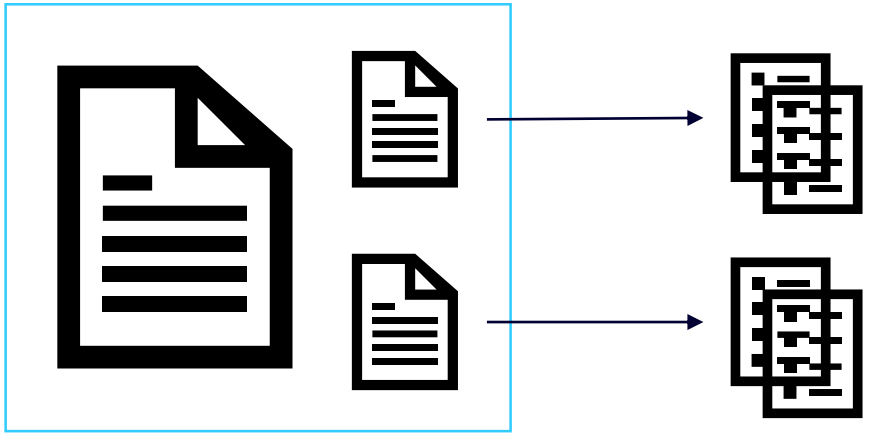
- Create a target equipment from a sales order and manually
- Perform appointment to a target equipment
- Perform actions upon Target Equipment items
  - Selling Model Equipment
  - Selling Optional Component
  - Upgrading Component
  - Replacing Target Equipment
  - Replacing Component

Lesson 4 – Service Contracts

- Create a service contract
- Create a service contract schedule
- Generate a service order for the service contract

Lesson 4 – Service Contracts

- Service contract
- Service contract schedule



Lesson 4 – Service Contracts

POLL #5:

Select the stage that is not a part of the processing of a service contractSelect Selling Model Equipment

- Entering the service contract
- Creating the contract schedule
- Generating the service orders
- Releasing the invoices

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Part 1 – Equipment Management

- Create Manufacturers
- Create item class for Model Equipment and components
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- Create target equipment
- Use different Target Equipment actions
- Managing Service contracts

Part 2 Route Management

Part 2 – Route Management

- Create routes
- Create route class and route services
- Define staff members as drivers
- Create route service order type
- Create route service contract and route service contract schedules
- Create route documents on the fly
- Create, modify and delete route appointments

Overview

- Route Management
- Documents:
  - Route (Route template)
  - Route documents details (Route instance)

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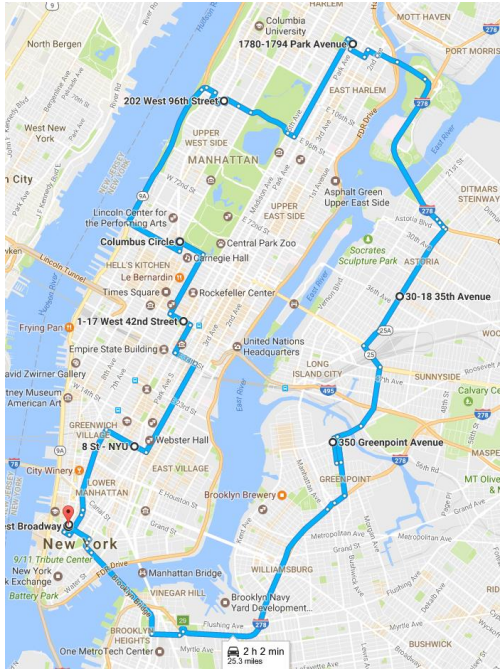
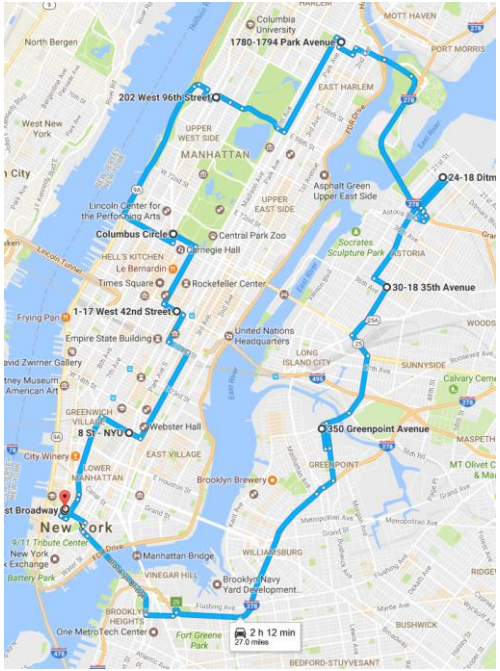
Route Management Setup

Route

Monday 01/06/2014



Friday 01/10/2014



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Lesson 6: Processing Route Appointments

POLL #6:

The routes can be created only manually for a specific day.

- True
- False

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Day 3

Part 2 Route Management: Lesson 5, 6, 7
Part 3 Mobile App

Lesson 5: Introduction to Route Management

- Creating service order type with Route behavior
- Creating and assigning driver skill
- Creating vehicle type and vehicles
- Creating an item class and route services
- Creating routes

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Lesson 5: Introduction to Route Management

POLL #7:

What is the first step to be able to create vehicles in Acumatica ERP?

- Create skills
- Create vehicle type
- Create an item class for route

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Lesson 6: Processing Route Appointments

- Create a route execution document
- Add route appointments to the route
- View the route on the map
- Modify routes and the order of appointments in the route
- Start, complete, and close routes
- Create pickup route service
- Create delivery route service

Lesson 6: Processing Route Appointments

POLL #8:

If the vehicle was entered as a fixed asset on the Fixed Assets form, you can't associate the fixed asset with the vehicle.

- True
- False

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Lesson 7: Route Service Contracts

- Create a route service contract
- Create a schedule for the route service contract
- Setup the order in which appointments for the route will be generated
- Generate appointments for the service contract
- Find the generated route execution documents in the system and assign drivers and vehicles

Lesson 7: Route Service Contracts

POLL #9:

With what status can a route execution be reopened?

- Completed
- Closed

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Part 2 – Route Management

- Create routes
- Create route class and route services
- Define staff members as drivers
- Create route service order type
- Create route service contract and route service contract schedules
- Create route documents on the fly
- Create, modify and delete route appointments

Part 3 The Mobile Application

Part 3 – The Mobile Application

- Install the mobile application
- Process route appointments in the mobile application

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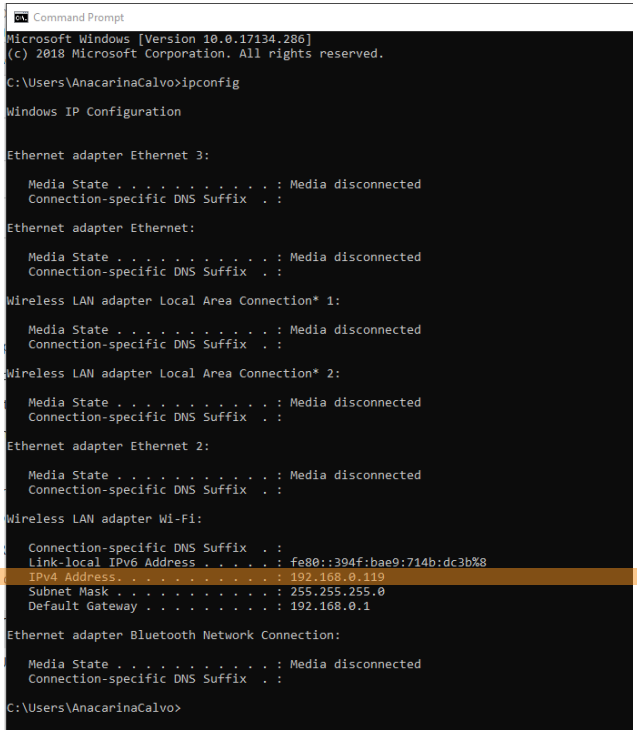
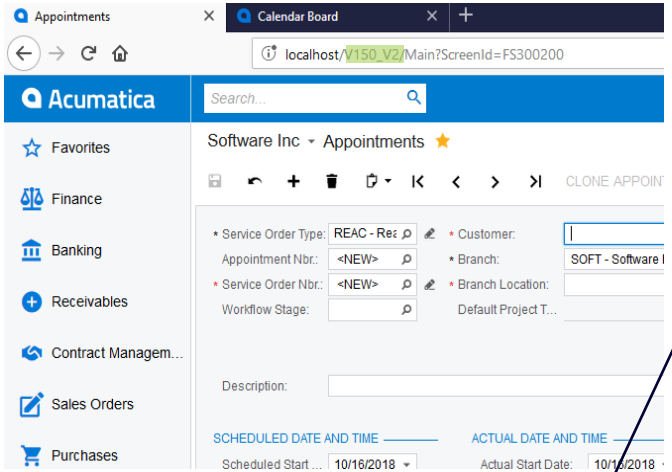
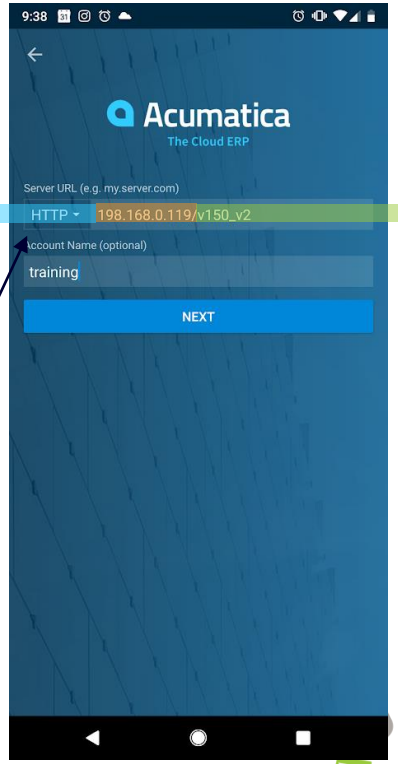
Lesson 8: Introduction to the Acumatica Mobile App







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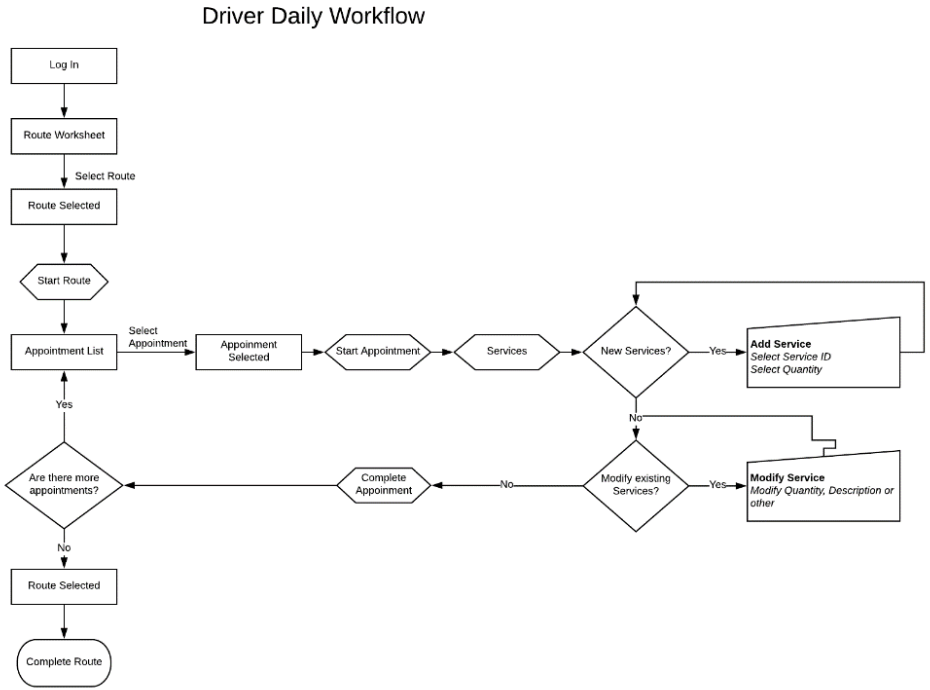
Lesson 9: Use of the Mobile Application…

- Sign in to the Acumatica mobile application
- Learn how to navigate between the app forms
- Learn how to make selections and enter data on the forms
- Start a route appointment in the mobile app
- Modify the route appointment in the mobile app
- Complete a route in the mobile app
- Generate an invoice for the appointment

Lesson 9: Use of the Mobile Application



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Part 3 – The Mobile Application

- Install the mobile application
- Process route appointments in the mobile application

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Survey

- Please give us your feedback:

https://www.surveymonkey.com/r/onlinesessions2018

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Thank You

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