



Equipment and Route Management

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Business Analyst

Timing and Agenda

November 20, 2023 - 10:00-11:30 AM PT

Day 1

Lesson 1: Basic Equipment Management Configuration

Lesson 2: Configuration of Equipment to Be Tracked Post-Sale

Lesson 3: Management of Target Equipment

November 21, 2023 - 10:00-11:30 AM PT

Day 2

Lesson 3: Management of Target Equipment (continue)

Lesson 4: Management of Service Contracts

Timing and Agenda

November 22, 2023 - 10:00-11:30 AM PT

Day 3

**Lesson 4: Management of Service Contracts
(continue)**

Lesson 5: Route Management Configuration

Lesson 6: Route Executions with Service Delivery

November 23, 2023 - 10:00-11:30 AM PT

Day 4

Lesson 7: Route Executions with Item Delivery

Lesson 8: Route Service Contracts

**Lesson 9: Route Appointment Processing in the
Mobile App**



Day 1

Company Structure

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

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse.
- SweetLife Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.



Part 1: Equipment Management

Lesson 1: Basic Equipment Management Configuration

Learning Objectives

In this lesson, you will learn how to do the following:

- Enable the Equipment Management feature
- Review the minimum required configuration settings for the equipment management functionality

Configuring Equipment Management

Story

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center. You need to prepare the system for using the equipment management functionality.

Figure: Numbering sequence for equipment

Equipment Management Preferences

NOTES FILES CUSTOMIZATION TOOLS

GENERAL MAILING & PRINTING

NUMBERING SETTINGS

Equipment Numbering Sequence:	FSEQUIP - FS Equipment	1
* Service Contract Numbering Sequence:	FSCONTRACT - FS Contract	
* Service Contract Schedule Numbering S...	FSSCHEDULE - Staff Members' Sche...	

BILLING SETTINGS

Generated Billing Documents:	AR Documents	
* Default Terms:	30D - 30 Days	2
Use Sales Account From:	Customer/Vendor Location	

☒ Automatically Activate Upcoming Period

GENERAL SETTINGS

☐ Enable Service on All Target Equipment

CONTRACT SETTINGS

☐ Enable Seasons in Schedule Contracts

EQUIPMENT SETTINGS

Calculate Warranty From

- ☒ Sales Order Date
- ☐ Installation Date
- ☐ The Earliest of Both Dates
- ☐ The Latest of Both Dates

Lesson 2: Configuration of Equipment to Be Tracked Post-Sale

Learning Objectives

In this lesson, you will learn how to do the following:

- A manufacturer
- An item class of the **Model Equipment** type
- A stock item of the **Model Equipment** type without components
- An item class of the **Component** type
- Stock items of the **Component** type
- A stock item of the **Model Equipment** type with components specified

Creating a Manufacturer

Story

Suppose that SweetLife Service and Equipment Sales Center has in stock equipment of the Juice Appliances Co. manufacturer, a producer of the juicers, and sells this equipment to its customers. Acting as an administrative user, you will create a manufacturer record in the system.

Figure: Creation of a manufacturer

Manufacturers

JUICEAPP - Juice Appliances Co.

NOTES FILES CUSTOMIZATION TOOLS

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* Manufacturer ID: JUICEAPP - Juice Appliances Co. 1

* Description: Juice Appliances Co. 2

Contact:

GENERAL

☐ Override

MAIN CONTACT

Account Name:

Attention:

Email:

Web:

Business 1 ▾

Business 2 ▾

Fax ▾

MAIN ADDRESS

VIEW ON MAP

Address Line 1:

Address Line 2:

City:

* Country: US - United States of America 3

State:

Postal Code:

Creating an Item Class for Equipment Without Components

Story

Suppose that the SweetLife Service and Equipment Sales Center is going to sell different models of centrifugal juicers, so you need to create an item class that will group juicers with similar settings. Acting as an administrative user, you will create the CENTRIFJUC - Centrifugal Juicers item class of the Model Equipment equipment type, which will group different models of centrifugal juicers. The equipment of this class does not have components.

Creating Equipment with No Components

Story

Suppose that the SweetLife Service and Equipment Sales Center is going to sell centrifugal juicers with automatic pulp ejection and track these juicers after the sale. Acting as an administrative user, you will create the *JUICE_J22C - Multifruit Centrifugal Juicer J22C* stock item based on the item class of the **Model Equipment** type.

Creating an Item Class for Components

Story

Suppose that the SweetLife Service and Equipment Sales Center is going to sell cold press juicers with components. Acting as an administrative user, you will create the *CPRESSCOMP - Cold press juicer components* item class of the **Component** equipment type, which will group components of the cold press juicers.

Creating Components

Story

Suppose that the SweetLife Service and Equipment Sales Center is going to sell juicers that have components. Acting as an administrative user, you have already created an item class of the **Component** equipment type for these components, and now you are going to create the components themselves.

Creating an Item Class for Equipment with Components

Story

An administrative user of the SweetLife Service and Equipment Sales Center is going to create an item class for grouping commercial cold press juicers with components. Acting as an administrative user, you will create the *COLDPRESS - Commercial Cold Press Juicers* item class of the **Model Equipment** equipment type. The equipment of this class has components.

Figure: The item class with components

Item Classes

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Item Class Tree

- ALLOTHER** All Other
- BLADE**** Blade Holders
- CENTRIFJUC Centrifugal Juicers
- COACHING** Coaching
- COLDPRESS* Commercial Cold Press**
- COMPUTERS* Computers and Accessori
- CONTAINER* Juicer Containers and Tray
- COVER***** Juicer Covers
- CPRESSCOMP Cold press juicer compor
- DELIVERING Delivery Services
- FOOD***** Food Class
- FURNITURE* Office furniture and access
- INSTALLING Installation Services
- JAM***** Jam
- JCRCFGPRPT* Parts of configurable juicer
- JCRSPRPRT* Juicer spare parts
- JUICER**** High Speed Juicers
- JUICERCFG* Configurable juicers
- JUICERLOW* Low Speed Juicers
- JUICERMED* Medium Speed Juicers
- LABOR***** Labor
- MFGEXPENCE Expenses in manufacturi
- MJUICE**** Fruit and vegetable juices
- MNUTS***** Nuts

* Class ID: COLDPRESS - Commercial Cold Pres

Description: Commercial Cold Press Juicers

GENERAL REPLENISHMENT RESTRICTION GROUPS ATTRIBUTES **SERVICE MANAGEMENT**

EQUIPMENT MANAGEMENT

Equipment Class

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

* Component ID	Active	Optional	Quantity	Description	* Item Class ID
AUGER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Auger	CPRESSCOMP
DRUM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Drum	CPRESSCOMP
HOPPER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Hopper	CPRESSCOMP
HOPPER O	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Hopper optional	CPRESSCOMP
JUICECUP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Juice Cup	CPRESSCOMP
PLUNGER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Plunger	CPRESSCOMP

Creating Equipment with Components

Story

Suppose that the SweetLife Service and Equipment Sales Center is going to sell commercial cold press juicers that have components and track these juicers after the sale. Acting as an administrative user, you will create the *CPRESS30J - Cold Press Juicer H30J* stock item based on an item class of the *Model Equipment* type and define the components this equipment includes.

Figure: The defined model equipment

Model Equipment and Component Summary

CUSTOMIZATION ▾ TOOLS ▾

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Item Class ID:

Drag column header here to configure filter

Inventory ID	Equipment Class	Item Status	Class ID	Manufacturer ID	Manufacturer Model
> D 30HOPPERJK	Component	Active	CPRESSCOMP	JUICEAPP	
D AUGERH30J	Component	Active	CPRESSCOMP	JUICEAPP	
D BASKET	Component	Active	OTHERPARTS		
D BLADE12	Component	Active	BLADE		
D BLADE20	Component	Active	BLADE		
D CONTAINER	Component	Active	CONTAINER		
D COVERPRO	Component	Active	COVER		
D CPRESS30J	Model Equipment	Active	COLDPRESS	JUICEAPP	
D CUPH300J	Component	Active	CPRESSCOMP	JUICEAPP	
D DRUMH30J	Component	Active	CPRESSCOMP	JUICEAPP	
D EJECTOR03	Component	Active	OTHERPARTS		
D EJECTOR05	Component	Active	OTHERPARTS		
D HOPPERH3	Component	Active	CPRESSCOMP	JUICEAPP	
D JUICCY J22C	Model Equipment	Active	CENTRIFJUC	JUICEAPP	
D JUICER05	Model Equipment	Active	JUICERLOW	SQUEEZO	
D JUICER05C	Model Equipment	Active	JUICERLOW		

Lesson 3: Management of Target Equipment

Learning Objectives

In this lesson, you will learn how to do the following:

- Record the receipt of stock items in the system and create a sales order to register the sale of a piece of equipment to a customer
- Review the target equipment that a customer has
- Create an appointment for services performed on the customer's target equipment
- Create target equipment manually
- Sell a piece of equipment and an optional component
- Sell an optional component that will upgrade target equipment
- Upgrade a default component of a piece of equipment being sold
- Replace target equipment
- Replace a component of target equipment

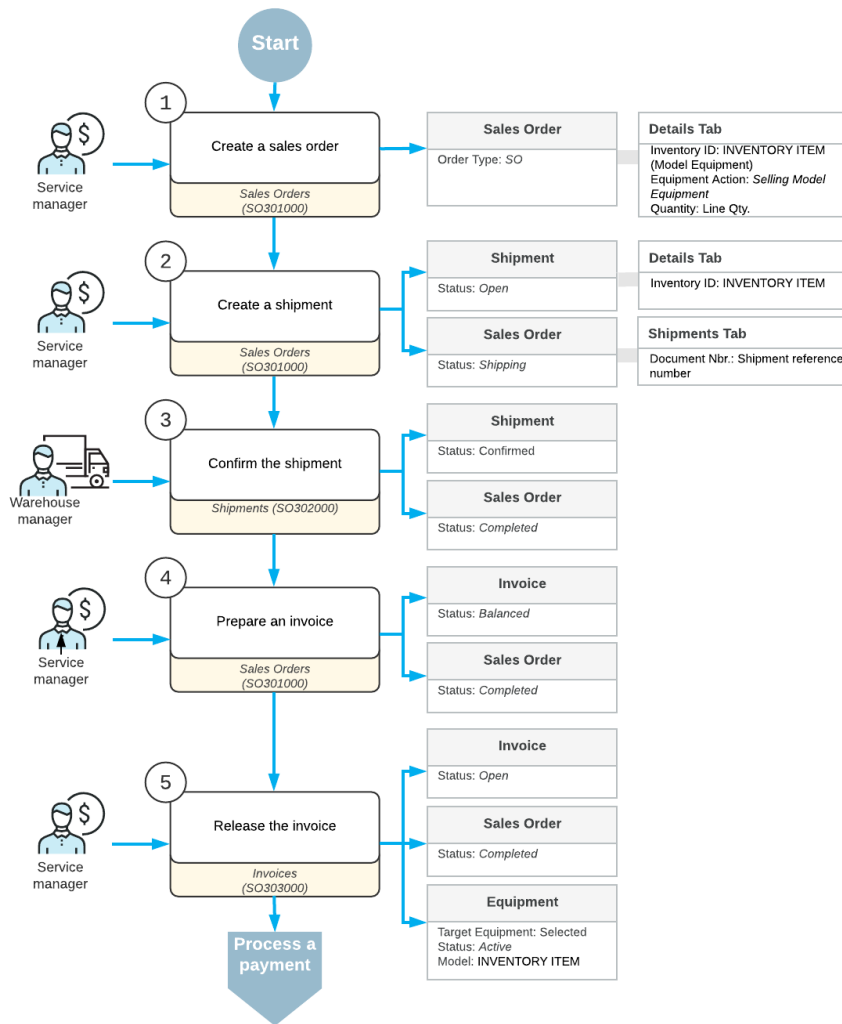


Figure: Selling a piece of model equipment from a sales order

Recording the Receipt of Stock Items

Story

Suppose that the SweetLife Service and Equipment Sales Center purchased equipment from the vendor, and needs to register the purchase in the system so that the items will be reflected in the warehouse.

Acting as an accountant, you will add an inventory receipt to the system indicating the purchase of the equipment. (To keep this training simple, you do not need to sign in as the accountant; you will perform this step under the user account of the service manager, Maia Davis.)

Figure: The receipt for the equipment items

✓ The operation has completed.

Receipts
 000086

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Reference Nbr.: <input type="text" value="000086"/>	Transfer Nbr.: <input type="text"/>	Total Qty.: 160.00
Status: Released	External Ref.: <input type="text"/>	Total Cost: 36,700.00
Date: <input type="text" value="1/30/2023"/>	Description: <input type="text"/>	
Post Period: <input type="text" value="01-2023"/>		

[DETAILS](#) FINANCIAL

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		*Inventory ID	*Warehouse	Location	Quantity	*UOM	Unit Cost	Ext. Cost	Reason Code	Cost Layer Type	*Project	Project Task	Cost Code	Description
>	📄	CRESS30J	EQUIHOUSE	MAIN	20.00	ITEM	800.0000	16,000.00	INRECEIPT	Normal	X			Cold Press Juicer H30J
	📄	JUICY J22C	EQUIHOUSE	MAIN	20.00	ITEM	700.0000	14,000.00	INRECEIPT	Normal	X			Juicy J22C Multifruit Centrifugal Juicer
	📄	CUPH300J	EQUIHOUSE	MAIN	20.00	ITEM	50.0000	1,000.00	INRECEIPT	Normal	X			Juice Cup H30J
	📄	HOPPERH3	EQUIHOUSE	MAIN	20.00	ITEM	40.0000	800.00	INRECEIPT	Normal	X			Hopper for cold press juicers (plastic)
	📄	30HOPPERJK	EQUIHOUSE	MAIN	20.00	ITEM	50.0000	1,000.00	INRECEIPT	Normal	X			Hopper H30J metallic
	📄	PLUNGERH30J	EQUIHOUSE	MAIN	20.00	ITEM	25.0000	500.00	INRECEIPT	Normal	X			Plunger H30J
	📄	AUGERH30J	EQUIHOUSE	MAIN	20.00	ITEM	70.0000	1,400.00	INRECEIPT	Normal	X			Auger H30J
	📄	DRUMH30J	EQUIHOUSE	MAIN	20.00	ITEM	100.0000	2,000.00	INRECEIPT	Normal	X			Drum H30J

On Hand 20.00 ITEM, Available 20.00 ITEM, Available for Shipping 20.00 ITEM, Available for Issue 20.00 ITEM

Processing a Sales Order for Equipment

Story

Suppose that the GOODFOOD (GoodFood One Restaurant) customer would like to purchase two pieces of equipment, along with installation services, from the SweetLife Service and Equipment Sales Center.

Acting as a service manager, you receive the request and create a sales order. Then acting as an accountant, you prepare and release an invoice. (To keep this training simple, you will perform all instructions by using the user account of the service manager (Maia Davis).

Figure: Target equipment created on release of the invoice

Invoices

Invoice 000113 - GoodFood One Restaurant

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Type: Invoice

Reference Nbr.: 000113

Status: Open

Date: 1/30/2023

Post Period: 01-2023

Customer Ord...

Project/Contract: X - Non-Project Code.

Description:

Customer: GOODFOOD - GoodFood One Restaurar

Location: MAIN - Primary Location

Terms: 30D - 30 Days

* Due Date: 3/1/2023

* Cash Discount... 3/1/2023

Detail Total: 1,500.00

Discount Total: 0.00

Tax Total: 0.00

Write-Off Total: 0.00

Balance: 1,500.00

Amount: 1,500.00

Cash Discount: 0.00

✓ The operation has completed.

DETAILS

TAXES

FREIGHT

FINANCIAL

ADDRESSES

APPLICATIONS

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ADD ORDER

ADD SO LINE

ADD RETURN LINE

RESET ORDER

⏮

⏭

📄	🔍	📄	Tran. Type	Reference Nbr.	Line Nbr.	Shipment Nbr.	Order Type	Order Nbr.	Inventory ID	Suspended Target Equipment ID	Equipment Action	Target Equipment ID	Model Equipment Line Nbr.	Component ID	Component Line Nbr.	Re Sv Do Nb
>	📄	📄	INV	000113	1	000066	SO	000071	JUICCY J22C		Selling Model Equipment	FSE00010				
	📄	📄	INV	000113	2	000066	SO	000071	CPRESS30J		Selling Model Equipment	FSE00011				

Figure: Details of the target equipment

Equipment
FSE00010 - Juicy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: FSE00010
Equipment Type:
Status: Active
Serial Nbr.:
Description: Juicy J22C Multifruit Centrifugal Juicer

☐ Vehicle
☒ Target Equipment
☐ Resource Equipment

Owner
☐ Company
☒ Customer
* Customer: GOODFOOD - Good

Location
☐ Company
☒ Customer
* Customer: GOODFOOD - Good
Location: MAIN - Primary Loca

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

Registered Date:
Registration N...
Barcode:
Tag Nbr.:
Sales Date: 1/30/2023
Color:

MANUFACTURER INFO
Manufacturer: JUICEAPP - Juice Appliances
Manufacturer ...
Manufacturing ...

INVENTORY INFO
Model Equipm... JUICY J22C - Juicy J22C
Warehouse: EQUIPHOUSE - Warehouse fc
Warehouse Lo...
Model Serial N...

INSTALLATION INFO
Installation Date: 1/30/2023
Service Order ...
Appointment N...

DISPOSAL INFO
Disposal Date:
Replacement ...

Figure: Components and warranties of the equipment

Equipment

FSE00011 - Cold Press Juicer H30J

NOTES ACTIVITIES FILES TOOLS

Equipment Type:

Target Equipment

Resource Equipment

Status:

Active

Serial Nbr.:

Description:

Cold Press Juicer H30J

Owner

Company

Customer

* Customer: GOODFOOD - Good

Location

Company

Customer

* Customer: GOODFOOD - Good

Location: MAIN - Primary Loca

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

COMPANY GENERAL WARRANTY

Company Warr...

12

Months

Company Warr...

1/30/2024

VENDOR GENERAL WARRANTY

Vendor Warran...

6

Months

Vendor Warran...

7/30/2023

REPLACE COMPONENT

		Ref. Nbr.	Component ID	Status	Description	Item Class ID	Inventory ID	Serial Nbr.	Company Warranty	Company Warranty Type	Company Warranty End Date	Vendor Warranty	Vendor Warranty Type	Vendor Warranty End Date	Vendor ID
>		00001	JUICECUP	Active	Juice Cup	CPRESSCOMP	CUPH300J		6	Months	7/30/2023	3	Months	4/30/2023	
		00002	HOPPER	Active	Hopper	CPRESSCOMP	HOPPERH3		3	Months	4/30/2023	0	Months		
		00003	PLUNGER	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
		00004	AUGER	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	SQUEEZO
		00005	DRUM	Active	Drum	CPRESSCOMP	DRUMH30J		12	Months	1/30/2024	6	Months	7/30/2023	

Creating an Appointment for Servicing Target Equipment

Story

Suppose that the GoodFood One Restaurant customer wants the SweetLife Service and Equipment Sales Center to perform installation and training services at the customer's location on the cold press and centrifugal juicers it has purchased. Acting as a service manager, you will receive the request and create and process an appointment.

Figure: Creation of an appointment for work on target equipment

Appointments

INST 000044-1 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

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* Service Order ... INST - Insta ⓘ Customer: GOODFOOD - GoodFood One Restaurant ⓘ Estimated Duration: 3 h 30 m

Appointment N... 000044-1 ⓘ * Location: MAIN - Primary Location ⓘ Actual Duration: 0 h 00 m

Service Order ... 000044 ⓘ * Branch Location: WEST BRIGHTON - Office in West Bri ⓘ Actual Billable Total: 275.00

Status: Not Started Service Contract: ⓘ Actual Tax Total: 0.00

* Scheduled Sta... 1/30/2023 ⓘ Project: X - Non-Project Code. ⓘ Invoice Total: 275.00

* Actual Start D... 1/30/2023 ⓘ ☐ Waiting for Purchased Items

Description: Installation and training services

SETTINGS DETAILS TAXES STAFF RESOURCE EQUIPMENT LOG FINANCIAL PROFITABILITY ATTRIBUTES PREPAYMENTS TOTALS BILLING DOCUMENTS OTHER

🔄 + ✎ ✕ ADD ITEMS LOT/SERIAL NBRS ADD STAFF ACTIONS ▾ CREATE EXPENSE RECEIPT CREATE AP BILL |🔍 📄 ⬆ All Records 🔍

📄	🔍	Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rule	Description	Equipment Action	Target Equipment ID	Model Equipment Ref. Nbr.	Component ID	Component Ref. Nbr.	Staff Member ID
🔍	🔍	0001	Not Started	Service	INSTALL	Flat Rate	Installation of equipment at the customers' place	N/A	FSE00010				<SPLIT>
🔍	🔍	0002	Not Started	Service	TRAINING	Time	Training on juicer usage (at customer's place)	N/A	FSE00010				<SPLIT>
🔍	🔍	0003	Not Started	Service	INSTALL	Flat Rate	Installation of equipment at the customers' place	N/A	FSE00011				<SPLIT>
>	🔍	0004	Not Started	Service	TRAINING	Time	Training on juicer usage (at customer's place)	N/A	FSE00011				<SPLIT>

Figure: Appointment history for the target equipment

Appointment Details

CUSTOMIZATION ▼ TOOLS ▼

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Branch: SWEETEQUIP - Service and

Branch Location: WEST BRIGHTON - Office in

Customer:

Location:

Service Order Type:

Service Order Nbr.:

Service Contract ID:

Schedule ID:

Item:

Target Equipment: FSE00010

From Scheduled Date:

To Scheduled Date:

Drag column header here to configure filter

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Branch Location ID	Order Type	Service Order Nbr.	Appointment Nbr.	Customer ID	Location ID	Scheduled Start Date	Actual Start Date	Actual Start Time	Actual End Time	Status	Line Type	Inventory ID	Target Equipment ID	Equipm
WEST BRIGHTON	INST	000044	000044-1	GOODFOOD	MAIN	1/30/2023	1/30/2023	6:43 PM		In Process	Service	INSTALL	FSE00010	
WEST BRIGHTON	INST	000044	000044-1	GOODFOOD	MAIN	1/30/2023	1/30/2023	6:43 PM		In Process	Service	TRAINING	FSE00010	

Creating Target Equipment Manually

Story

Suppose that the SweetLife Service and Equipment Sales Center needs to perform services on the equipment that was sold to the HMBAKERY - HM's Bakery & Cafe customer by a third party. Acting as a service manager, you will enter this equipment record in Acumatica ERP.

Figure: Manual creation of target equipment

Equipment
Juicy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS ▾

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Equipment Nbr.: <NEW> 🔍

Equipment Type: 🔍 ✎

Status: Active ▾

Serial Nbr.:

Description: Juicy J22C Multifruit Centrifugal Juicer 1

Owner

☐ Company

☒ Customer 3

* Customer: HIMBAKERY - HM's f 🔍

Location

☐ Company

☒ Customer 4

* Customer: HIMBAKERY - HM's f 🔍

Location: MAIN - Primary Loca 🔍

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

Registered Date: ▾

Registration N...

Barcode:

Tag Nbr.:

Sales Date: ▾

Color: ▾

INSTALLATION INFO

Installation Date: 1/30/2023 5

Service Order ...

Appointment N...

MANUFACTURER INFO

Manufacturer: JUICEAPP - Juice Appliances ✎

Manufacturer ... ✎

Manufacturing ...

INVENTORY INFO

Model Equipm... JUICCY J22C - Juicy J22C 6

Warehouse: ✎

Warehouse Lo... ✎

Model Serial N...

Figure: The created target equipment

Equipment Summary

CUSTOMIZATION ▾ TOOLS ▾

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Equipment Type:

Location:

Customer:

Model Equipment:

Drag column header here to configure filter

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		Equipment Type	Equipment Nbr.	Status	Description	Serial Nbr.	Target Equipmen	Resource Equipmen	Vehicle	Owner Type	Location Type	Customer ID	Location ID	Branch ID
>	🔍		FSE00012	Active	Juicy J22C Multifruit Centrifugal Juicer		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	HIMBAKERY	MAIN	
	🔍		FSE00006	Active	Commercial citrus juicer with a production r...		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	HIMBAKERY	MAIN	

Selling a Piece of Equipment and an Optional Component

Story

Suppose that the customer has contacted the SweetLife Service and Equipment Sales Center to request the following:

- A cold press juicer—that is, the CPRESS30J - Cold Press Juicer H30J equipment (a stock item of the Model Equipment type)
- An optional component for the juicer—the 30HOPPERJK - Hopper H30J metallic component (a stock item of the Component type)
- Installation services

Acting as a service manager, you will create an appointment. Further processing will then be performed by the assigned staff member and the accountant, who will prepare and process billing documents for the customer. To keep this training simple, you will perform all instructions while you are signed into the user account of the service manager (Maia Davis).

Figure: The sale of model equipment and its optional component within a service order

LEGEND

———— Required action

----- Optional action

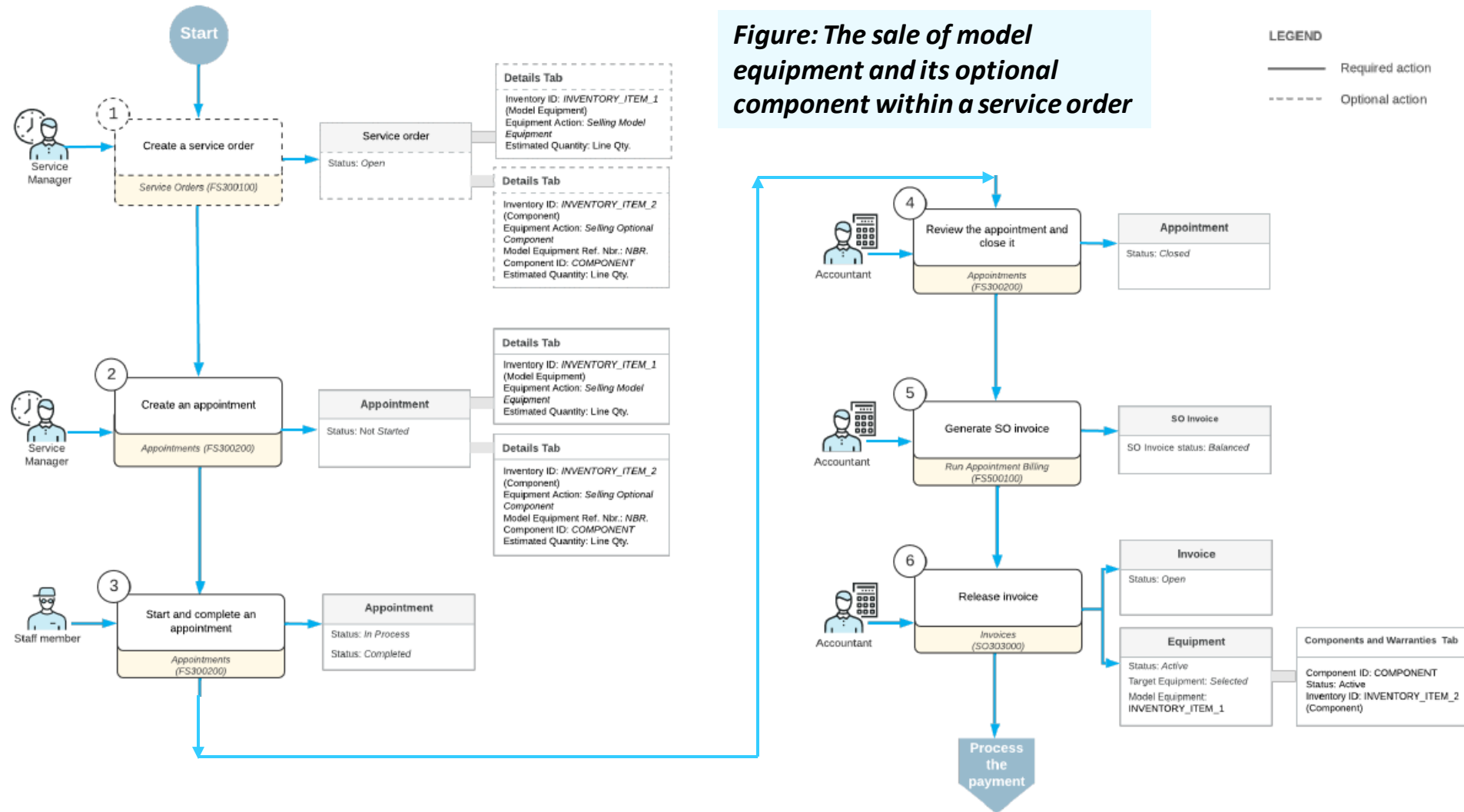


Figure: Equipment record with the additional component

Equipment

FSE00013 - Cold Press Juicer H30J

NOTESACTIVITIESFILESTOOLS

Equipment Nbr.: FSE00013

Equipment Type:

Status: Active

Serial Nbr.:

Description: Cold Press Juicer H30J

☐ Vehicle

☒ Target Equipment

☐ Resource Equipment

Owner

☐ Company

☒ Customer

* Customer: TOMYUM - Thai Foo

Location

☐ Company

☒ Customer

* Customer: TOMYUM - Thai Foo

Location: MAIN - Primary Loca

GENERALPURCHASECOMPONENTS AND WARRANTIESATTRIBUTESSOURCE

COMPANY GENERAL WARRANTY

Company Warran... 12 Months

Company Warran... 1/30/2024

VENDOR GENERAL WARRANTY

Vendor Warran... 6 Months

Vendor Warran... 7/30/2023

REPLACE COMPONENT

Ref. Nbr.	Component ID	Status	Description	Item Class ID	Inventory ID	Serial Nbr.	Company Warranty	Company Warranty Type	Company Warranty End Date	Vendor Warranty	Vendor Warranty Type	Vendor Warranty End Date	Vendor ID
00002	HOPPER	Active	Hopper	CPRESSCOMP	HOPPERH3		3	Months	4/30/2023	0	Months		
00003	PLUNGER	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
00004	AUGER	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	SQUEEZO
00005	DRUM	Active	Drum	CPRESSCOMP	DRUMH30J		12	Months	1/30/2024	6	Months	7/30/2023	
00006	HOPPER O	Active	Hopper optional	CPRESSCOMP	30HOPPERJK		3	Months	4/30/2023	0	Months		



Day 2

Saddleback Leather
Acumatica Customer

Selling an Optional Component of Target Equipment

Story

Suppose that the customer has requested that an optional component (*30HOPPERJK*) of target equipment (*CPRESS30J - Cold Press Juicer H30J*, which the company already has) be installed at the customer site, along with installation services from SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will create an appointment. Further processing will then be performed by the assigned staff member, and the accountant who will prepare billing documents for the customer and will process them in the system. To simplify this training, you will perform all instructions while signed into the user account of the service manager (Maia Davis).

Figure: The sale of an optional component of target equipment

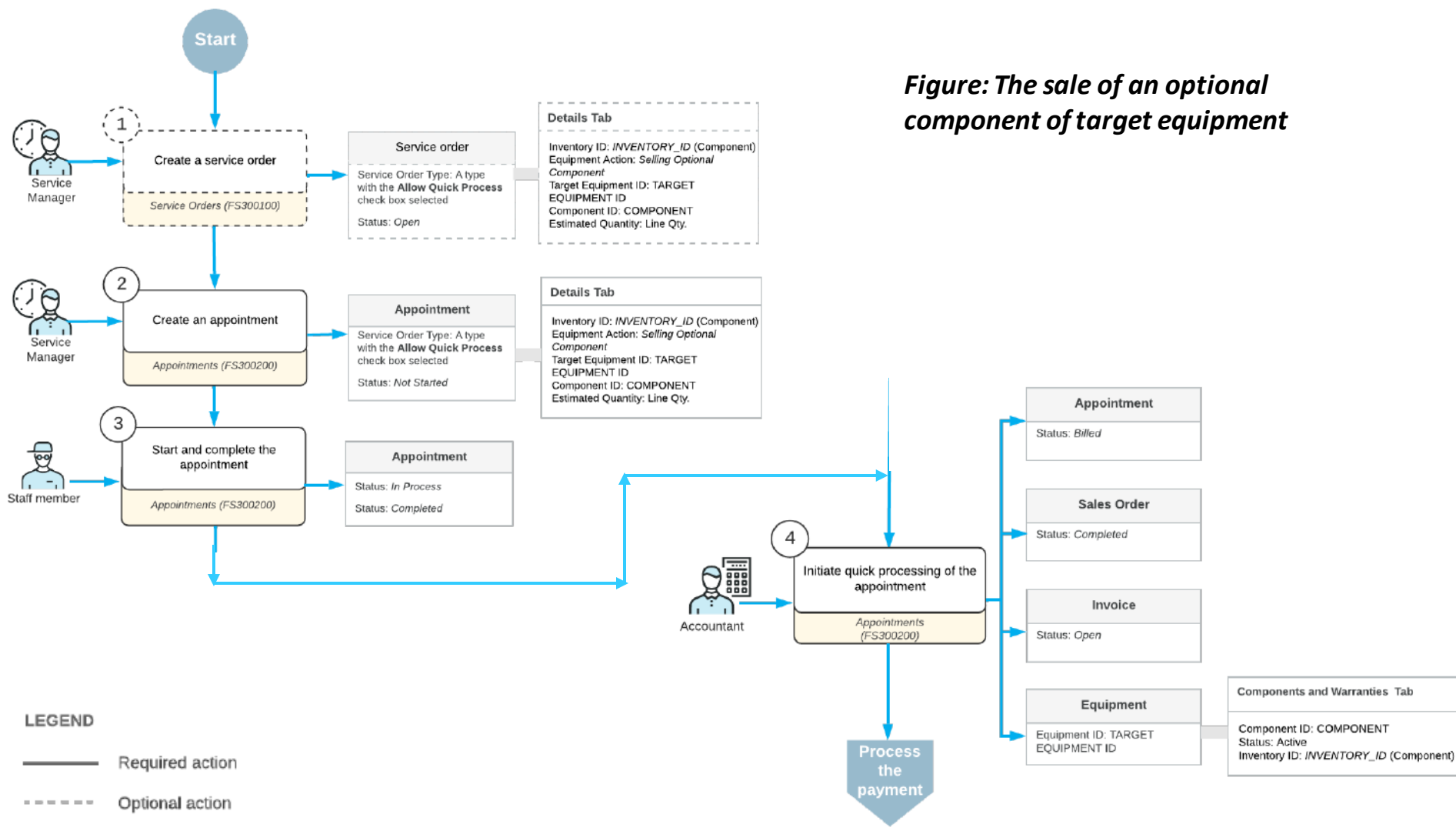


Figure: Equipment record with the additional component

Equipment

FSE00013 - Cold Press Juicer H30J

NOTES ACTIVITIES FILES TOOLS

← ↻ ↺ + 🗑️ 📄 ⏮ ⏪ ⏩ ⏭ ...

Description: Cold Press Juicer H30J

Owner

☐ Company

☒ Customer

* Customer: TOMYUM - Thai Foo

Location

☐ Company

☒ Customer

* Customer: TOMYUM - Thai Foo

Location: MAIN - Primary Loca

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

COMPANY GENERAL WARRANTY

Company Warran... 12 Months

Company Warran... 1/30/2024

VENDOR GENERAL WARRANTY

Vendor Warran... 6 Months

Vendor Warran... 7/30/2023

🔄 + ✕ REPLACE COMPONENT

Ref. Nbr.	Component ID	Status	Description	Item Class ID	Inventory ID	Serial Nbr.	Company Warranty	Company Warranty Type	Company Warranty End Date	Vendor Warranty	Vendor Warranty Type	Vendor Warranty End Date	Vendor ID
00002	HOPPER	Active	Hopper	CPRESSCOMP	HOPPERH3		3	Months	4/30/2023	0	Months		
00003	PLUNGER	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
00004	AUGER	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	SQUEEZO
00005	DRUM	Active	Drum	CPRESSCOMP	DRUMH30J	!	12	Months	1/30/2024	6	Months	7/30/2023	
00006	HOPPER O	Active	Hopper optional	CPRESSCOMP	30HOPPERJK		3	Months	4/30/2023	0	Months		

Upgrading a Default Component of Equipment to Be Sold

Story

Suppose that the customer has requested the following from the SweetLife Service and Equipment Sales Center:

- The CPRESS30J - Cold Press Masticating Juicer H3000J model equipment.
- A replacement of one of the default components of the juicer. The customer wants the 30HOPPERJK - Hopper H30J metallic component instead of the HOPPERH3 - Hopper for cold press juicers (plastic)) component.
- Installation services for the juicer and component.

Acting as a service manager, you will create an appointment. You will then perform further processing, acting as the assigned staff member and then as the accountant who will prepare billing documents for the customer and will process them in the system. To keep this training simple, you will perform all instructions while signed in to the account of the service manager (Maia Davis).

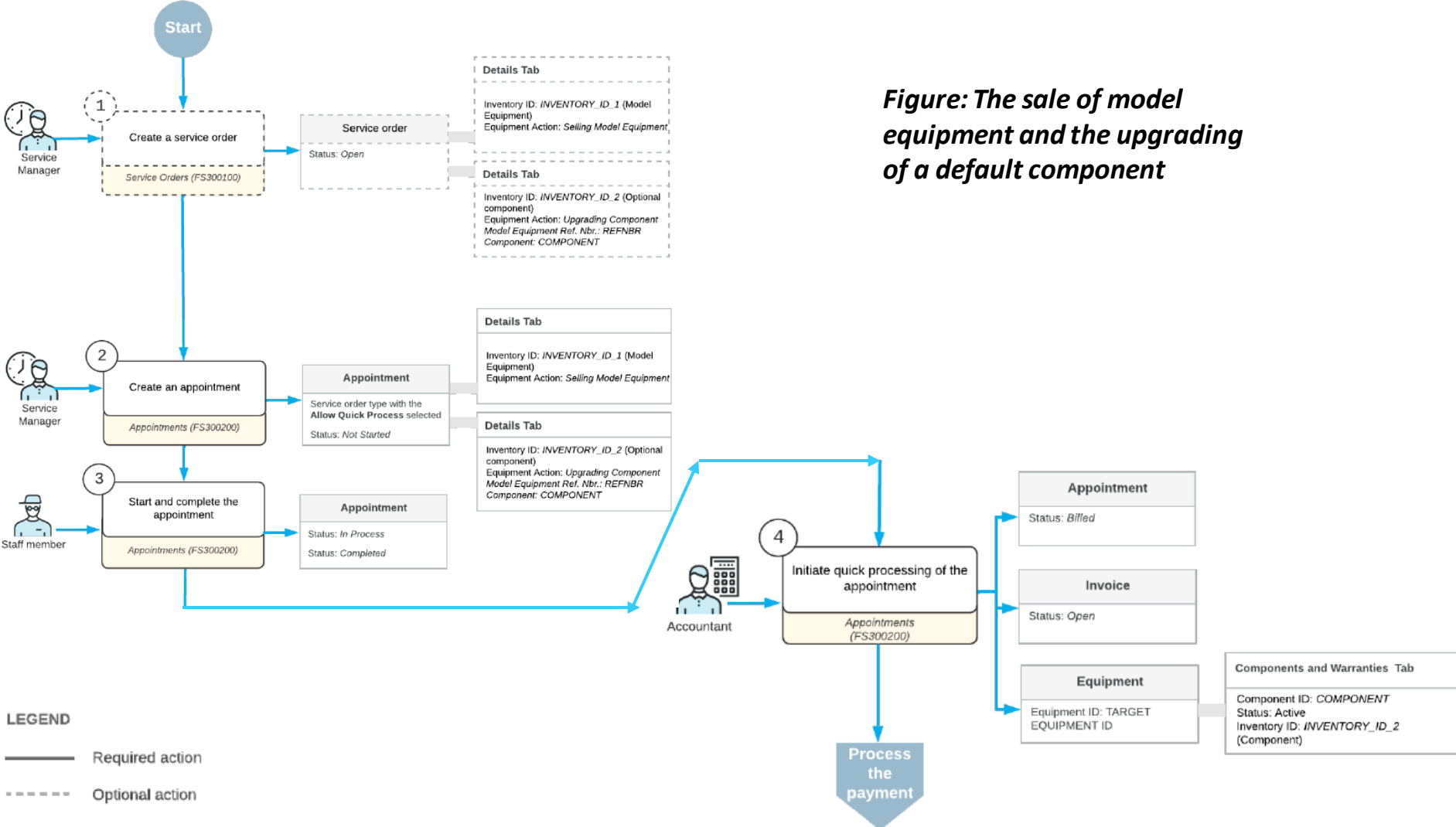


Figure: The equipment record with the additional component

Equipment
FSE00014 - Cold Press Juicer H30J

NOTES ACTIVITIES FILES TOOLS

Equipment Type: ☒ Target Equipment
Status: Active ☐ Resource Equipment
Serial Nbr.:
Description: Cold Press Juicer H30J

Owner
☐ Company
☒ Customer
* Customer: HIMBAKERY - HM's t

Location
☐ Company
☒ Customer
* Customer: HIMBAKERY - HM's t
Location: MAIN - Primary Loca

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

COMPANY GENERAL WARRANTY
Company Warran... 12 Months
Company Warran... 1/30/2024

VENDOR GENERAL WARRANTY
Vendor Warran... 6 Months
Vendor Warran... 7/30/2023

REPLACE COMPONENT

Ref. Nbr.	Component ID	Status	Description	Item Class ID	Inventory ID	Serial Nbr.	Company Warranty	Company Warranty Type	Company Warranty End Date	Vendor Warranty	Vendor Warranty Type	Vendor Warranty End Date	Vendor ID
00001	JUICECUP	Active	Juice Cup	CPRESSCOMP	CUPH300J		6	Months	7/30/2023	3	Months	4/30/2023	
00002	HOPPER	Active	Hopper H30J metallic	CPRESSCOMP	30HOPPERJK		3	Months	4/30/2023	0	Months		
00003	PLUNGER	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
00004	AUGER	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	SQUEEZO
00005	DRUM	Active	Drum	CPRESSCOMP	DRUMH30J		12	Months	1/30/2024	6	Months	7/30/2023	

Replacing Target Equipment

Story

Suppose that the HM's Bakery & Cafe customer has requested a new piece of equipment (J22C Multifruit Centrifugal Juicer) to replace an old one, along with replacement services from SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will create an appointment. You will then perform further processing, acting as the assigned staff member and then as the accountant who will prepare billing documents for the customer and will process them in the system. To keep this training simple, you will perform all instructions while signed in to the user account of the service manager (Maia Davis).

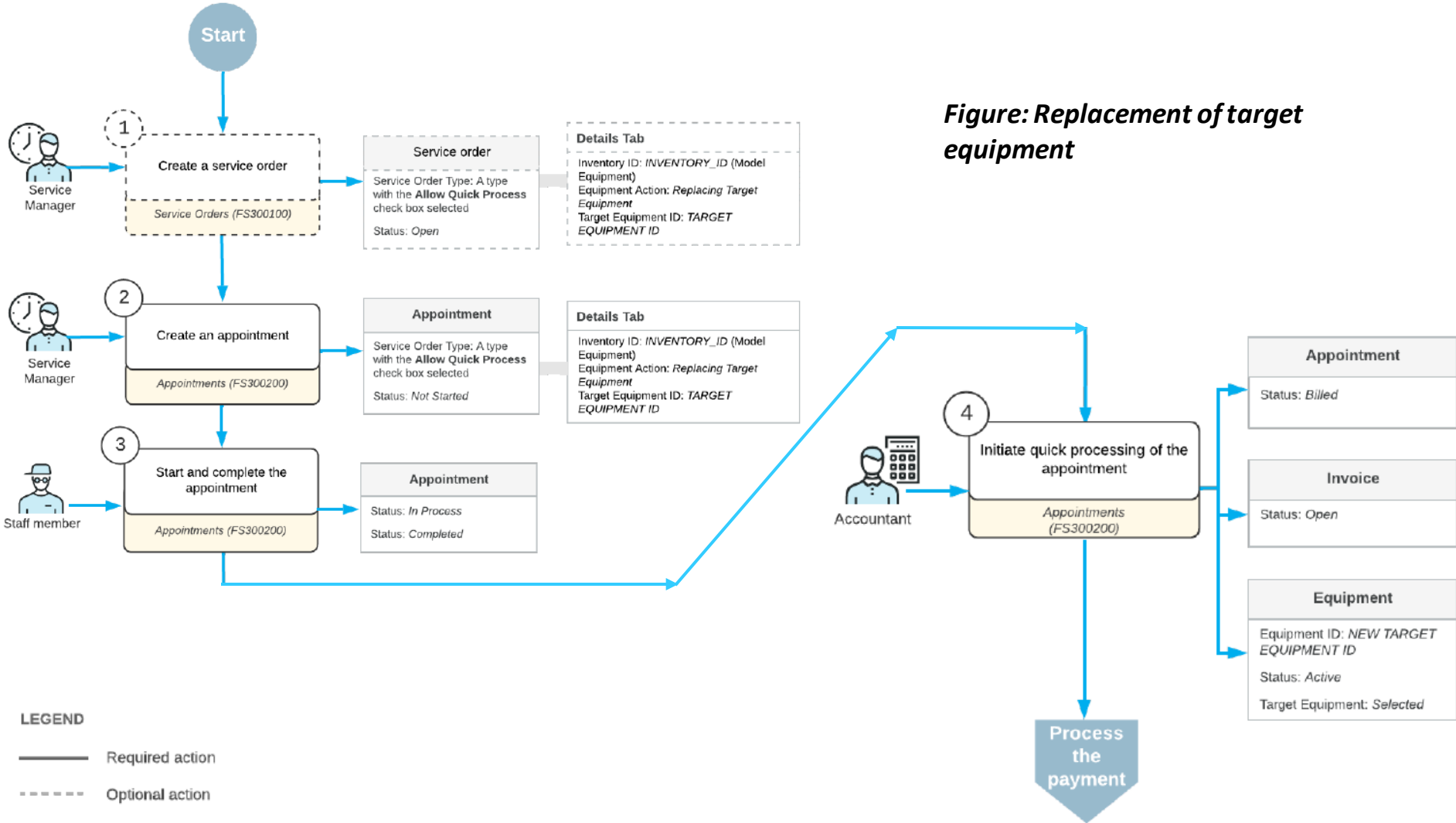


Figure: Disposed equipment

Equipment
FSE00012 - Juiccy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: FSE00012
Equipment Type:
Status: **Disposed**
Serial Nbr.:
Description: Juiccy J22C Multifruit Centrifugal Juicer

Owner
☐ Company
☒ Customer
* Customer: HIMBAKERY - HM's

Location
☐ Company
☒ Customer
* Customer: HIMBAKERY - HM's
Location: MAIN - Primary Loca

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

Registered Date:
Registration N...
Barcode:
Tag Nbr.:
Sales Date:
Color:

MANUFACTURER INFO
Manufacturer: JUICEAPP - Juice Appliances
Manufacturer ...
Manufacturing ...

INVENTORY INFO
Model Equipm... JUICCY J22C - Juiccy J22C
Warehouse:
Warehouse Lo...
Model Serial N...

INSTALLATION INFO
Installation Date: 1/30/2023
Service Order ...
Appointment N...

DISPOSAL INFO
Disposal Date: 1/30/2023
Replacement ... FSE00015 - Juiccy J22C Mult

Figure: Settings related to the replaced equipment

Equipment

FSE00015 - Juicy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS ▾

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Equipment Nbr.: FSE00015

Equipment Type:

Status: Active ▾

Serial Nbr.:

Description: Juicy J22C Multifruit Centrifugal Juicer

Owner

☐ Company

☒ Customer

* Customer: HIMBAKERY - HM's

Location

☐ Company

☒ Customer

* Customer: HIMBAKERY - HM's

Location: MAIN - Primary Loca

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

Document Type: AR - Invoice

Document Ref... 000119

Sales Order N... 000118

Equipment Re... FSE00012

Replacing a Component of Target Equipment

Story

Suppose that the GoodFood One Restaurant customer has requested a new component (a new drum) to replace an old one in the existing target equipment (CPRESS30J - Cold Press Juicer H30J), along with replacement services from SweetLife Service and Equipment Sales Center.

Acting as a service manager, you will create an appointment. You will then perform further processing, acting as the assigned staff member and then as the accountant who will prepare billing documents for the customer and will process them in the system. To keep this training simple, you will perform all instructions while signed in to the user account of the service manager (Maia Davis).

Figure: Replacement of a component of target equipment

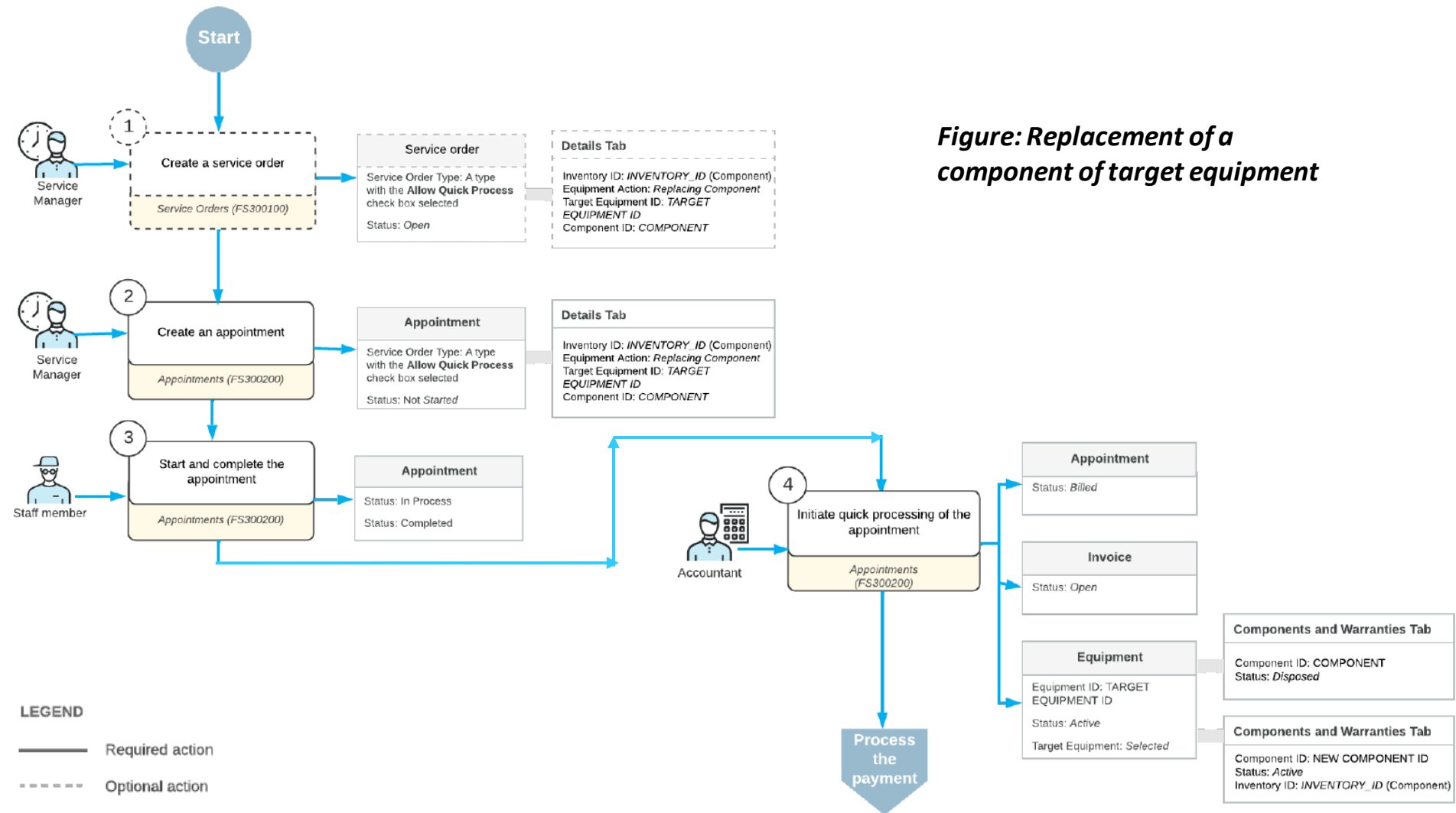


Figure: Disposed component

Equipment

FSE00011 - Cold Press Juicer H30J

NOTESACTIVITIESFILESTOOLS

Equipment Type: ☒ Target Equipment

Status: ☐ Resource Equipment

Serial Nbr.:

Description:

Owner

☐ Company

☒ Customer

* Customer:

Location

☐ Company

☒ Customer

* Customer:

Location:

GENERALPURCHASECOMPONENTS AND WARRANTIESATTRIBUTESSOURCE

COMPANY GENERAL WARRANTY

Company Warr...

Company Warr...


VENDOR GENERAL WARRANTY

Vendor Warran...

Vendor Warran...

REPLACE COMPONENT

Ref. Nbr.	Component ID	Status	Description	Item Class ID	Inventory ID	Serial Nbr.	Company Warranty	Company Warranty Type	Company Warranty End Date	Vendor Warranty	Vendor Warranty Type	Vendor Warranty End Date	Vendor ID
<input type="checkbox"/> 00002	HOPPER	Active	Hopper	CPRESSCOMP	HOPPERH3		3	Months	4/30/2023	0	Months		
<input type="checkbox"/> 00003	PLUNGER	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
<input type="checkbox"/> 00004	AUGER	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	SQUEEZO
<input type="checkbox"/> 00005	DRUM	Disposed	Drum	CPRESSCOMP	DRUMH30J	12345	12	Months	1/30/2024	6	Months	7/30/2023	
<input type="checkbox"/> 00006	DRUM	Active	Drum H30J	CPRESSCOMP	DRUMH30J		12	Months	1/30/2024	6	Months	7/30/2023	

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Lesson 4: Management of Service Contracts

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a service contract billed at the time of service
- Create a service contract billed at the end of the billing period, including the following actions:
 - Process an appointment with no additional items (those that are not covered by a service contract) added
 - Processing an appointment with overage services added
- Create and process a service contract billed at the beginning of the billing period

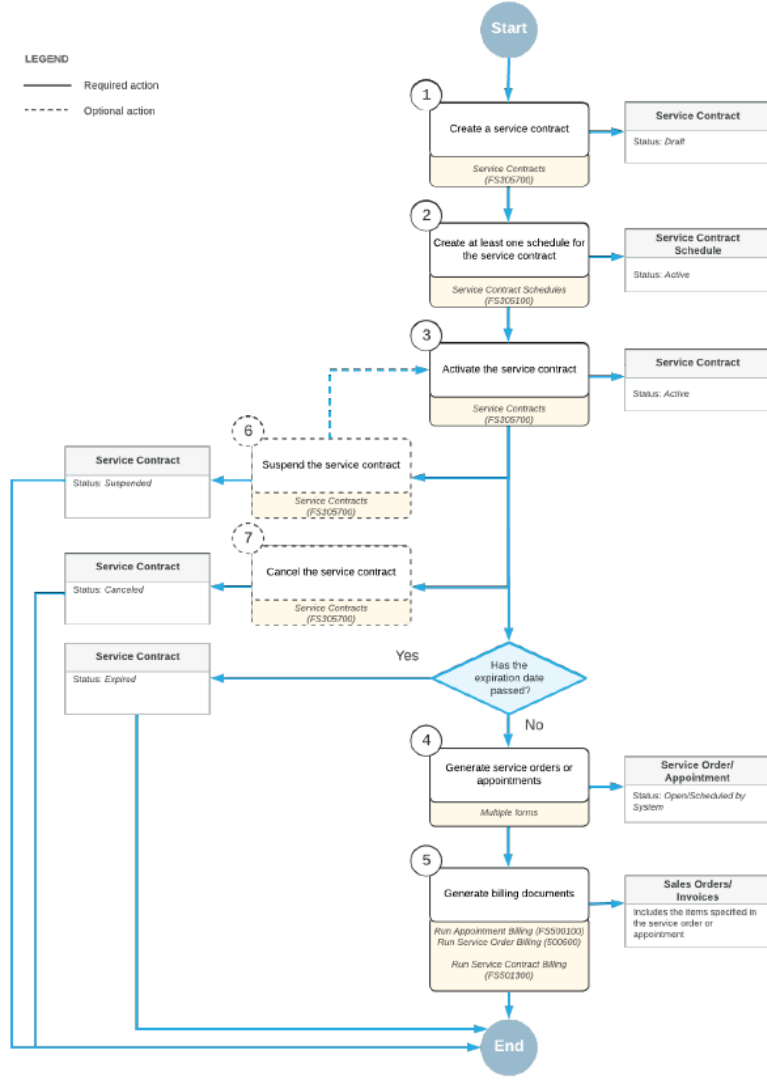


Figure: Processing of a service contract billed at the time of service

Creating a Service Contract Billed at the Time of Service









Story

Suppose that the GoodFood One Restaurant customer requires appointments on Mondays and Fridays of each week for one year, starting next week, and is willing to sign a contract. The service to be performed is the cleaning of the customer's equipment. The service manager of the SweetLife Service and Equipment Sales Center (Maia Davis) needs to create a service contract in Acumatica ERP, and create a schedule of appointments, which will allow employees to generate appointments for each upcoming week.

Acting as the service manager, you need to create a contract, create a schedule for the appointment generation, activate the contract, and generate the appointments for the first two weeks.











Figure: The appointments generated for the service contract

Appointment Summary TOOLS ▾

Branch: SWEETEQUIP - Service and Equipment
Branch Location: WEST BRIGHTON - Office in
Customer: GOODFOOD - GoodFood On
Location: MAIN - Primary Location
Service Order Nbr.:
Service Contract ID: FCT00000005
Schedule ID:
Staff Member:
Resource Equipment:
From Scheduled Date: 1/1/2023
To Scheduled Date: 2/13/2023

ALL RECORDS TODAY

	Branch ID	Branch Location ID	Service Order Type	Service Order Nbr.	Appointment Nbr.	Description	Customer	Location	Scheduled Start Date	Scheduled Start Time	Actual Start Date	Status
>	  SWEETEQUIP	WEST BRIGHTON	MRO	000050	000050-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	1/30/2023	10:00 AM		Not Started
	  SWEETEQUIP	WEST BRIGHTON	MRO	000051	000051-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/3/2023	10:00 AM		Not Started
	  SWEETEQUIP	WEST BRIGHTON	MRO	000052	000052-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/6/2023	10:00 AM		Not Started
	  SWEETEQUIP	WEST BRIGHTON	MRO	000053	000053-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/10/2023	10:00 AM		Not Started
	  SWEETEQUIP	WEST BRIGHTON	MRO	000054	000054-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/13/2023	10:00 AM		Not Started

Creating an End-Period Service Contract (Appointment with No Overage Items)

Story

Suppose that the HM's Bakery and Cafe customer has agreed to enter into a contract with the SweetLife Service and Equipment Sales Center for one hour of cleaning a juicer every week. The contract states that one hour of service is paid every week at a price of \$70; for overage cleaning services (which are occasionally required), a price of \$85 per hour should be paid. The customer will pay at the end of each week according to the prices that are defined in the contract.

The appointment schedule needs to be specified for the contract, and an appointment for the next week should be generated. You will perform the needed actions in the system, acting as the service manager, Maia Davis.

Figure: The service contract

Service Contracts

FCT00000006 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

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Service Contract ID: FCT00000006 🔍

Status: Active

Customer: HMBAKERY - HM's Bakery & Cafe ✎

Effective From Date: 1/30/2023

* Location: MAIN - Primary Location 🔍

Upcoming Status: Expired

Customer Contract Nbr.: 000003

Effective Until Date: 1/29/2024

Project: X - Non-Project Code. ✎

Master Contract: 🔍

Description: Cleaning contract

SUMMARY SCHEDULES SERVICES PER PERIOD BILLING DOCUMENTS HISTORY ATTRIBUTES

Actions: Search by Billing Periods ⌵

Billing Period: 01/30/2023 - 02/05/2023 🔍

Reference Nbr.:

Contract Total: 70.00

🔄 + × ⏴ ⏵

Line Type	*Inventory ID	Target Equipment ID	Billing Rule	Value	Recurring Item Price	Total Recurring Price	Overage Item Price	Remaining Period Value	Used P
> Service	CLEANING	FSE00006	Time	1 h 00 m	70.0000	70.00	85.0000	1 h 00 m	

Figure: One hour of service scheduled for the billing period

[Service Contracts](#)

NOTESACTIVITIESFILESTOOLS

FCT00000006 - HM's Bakery & Cafe

Service Contract ID: FCT00000006Status: Active

Customer: HMBAKERY - HM's Bakery & CafeEffective From Date: 1/30/2023

* Location: MAIN - Primary LocationUpcoming Status: Expired

Customer Contract Nbr.: 000003Effective Until Date: 1/29/2024

Project: X - Non-Project Code.

Master Contract:

Description: Cleaning contract

SUMMARYSCHEDULESSERVICES PER PERIODBILLING DOCUMENTSHISTORYATTRIBUTES

Actions: Search by Billing PeriodsBilling Period: 01/30/2023 - 02/05/2023Reference Nbr.:Contract Total: 70.00

Line Type	Inventory ID	Target Equipment ID	Billing Rule	Value	Recurring Item Price	Total Recurring Price	Overage Item Price	Remaining Period Value	Used Period Value	Scheduled Period Value	Project Task	Cost Code
> Service	CLEANING	FSE00006	Time	1 h 00 m	70.0000	70.00	85.0000	1 h 00 m	0 h 00 m	1 h 00 m		

Figure: The appointments generated from the contract schedule

Appointment Summary

TOOLS

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Branch: SWEETEQUIP - Service and Eq

Branch Location: WEST BRIGHTON - Office in

Customer: HIMBAKERY - HM's Bakery & Cafe

Location: MAIN - Primary Location

Service Order Nbr.:

Service Contract ID: FCT00000006

Schedule ID:

Staff Member:

Resource Equipment:

From Scheduled Date: 1/30/2023

To Scheduled Date: 2/6/2023

ALL RECORDS

TODAY

		Branch ID	Branch Location ID	Service Order Type	Service Order Nbr.	Appointment Nbr.	Description	Customer	Location	Scheduled Start Date	Scheduled Start Time	Actual Start Date	Status
>	🗑️	SWEETEQUIP	WEST BRIGHTON	MRO	000055	000055-1	Cleaning contract	HIMBAKERY - HM's Bakery & Cafe	MAIN - Primary...	1/30/2023	11:00 AM		Not Started
	🗑️	SWEETEQUIP	WEST BRIGHTON	MRO	000056	000056-1	Cleaning contract	HIMBAKERY - HM's Bakery & Cafe	MAIN - Primary...	2/6/2023	11:00 AM		Awaiting

Processing an Appointment with Overage Services

Story

Suppose that the HM's Bakery & Cafe customer wants the service personnel of the SweetLife Service and Equipment Sales Center to come to clean the juicer twice during the first billing period (January 30, 2023 through February 5, 2023): one appointment has been generated automatically from the contract schedule (on January 31, 2023), and another one will be generated on the fly by the service manager (Maia Davis). The staff member (Alberto Jimenez) will complete both appointments, and the accountant (Yona Jones) will generate an invoice for the billing period.

Figure: The check mark indicating that the appointment has been created for a service contract

Appointments

MRO 000057-1 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

← ↻ ⏮ + ⏭ ⏪ ⏩ ⏴ ⏵ HOLD **START** DEPART ...

* Service Order ... MRO - Main Ⓜ Customer: HIMBAKERY - HM's Bakery & Cafe Ⓜ Estimated Duration: 1 h 00 m

Appointment N... 000057-1 Ⓜ * Location: MAIN - Primary Location Ⓜ Actual Duration: 0 h 00 m

Service Order ... 000057 Ⓜ * Branch Location: WEST BRIGHTON - Office in West Bri Ⓜ Actual Billable Total: 0.00

Status: Not Started Service Contract: FCT00000001 - Cleaning Contract Ⓜ Actual Tax Total: 0.00

* Scheduled Sta... 2/4/2023 Contract Period: 01/30/2023 - 02/05/2023 Invoice Total: 0.00

* Actual Start D... 2/4/2023 Project: X - Non-Project Code. Ⓜ ☐ Waiting for Purchased Items

Description: Service on cleaning of juicers

SETTINGS DETAILS TAXES STAFF RESOURCE EQUIPMENT LOG FINANCIAL PROFITABILITY ATTRIBUTES TOTALS BILLING DOCUMENTS OTHER

🔄 + ✎ ✕ ADD ITEMS LOT/SERIAL NBRs ADD STAFF ACTIONS CREATE EXPENSE RECEIPT CREATE AP BILL |<| ☒ ⬆ All Records ▾ 🔍

Billable	Billable Quantity	Ext. Price	Ext. Cost	Discount Percent	Discount Amount	Billable Amount	Tax Category	Covered Quantity	Overage Quantity	Overage Unit Price	Mark for PO	PO Source	Vendor ID	Vendor Location ID	PO Nbr.	PO Status	Related Doc. Type	Related Doc. Nbr.	Service Contract Item
<input checked="" type="checkbox"/>	0.00	0.00	0.00	0.000000	0.0000	0.00	EXEMPT	1.00	0.00	85.0000	<input type="checkbox"/>								<input checked="" type="checkbox"/>

Figure: The Scheduled Period Value in the service contract

Service Contracts

FCT00000001 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

Service Contract ID: FCT00000001 Status: Active

Customer: HMBAKERY - HM's Bakery & Cafe Effective From Date: 1/30/2023

* Location: MAIN - Primary Location Upcoming Status: Expired

Customer Contract Nbr.: 000001 Effective Until Date: 1/29/2024

Project: X - Non-Project Code.

Master Contract:

Description: Cleaning Contract

SUMMARY SCHEDULES SERVICES PER PERIOD BILLING DOCUMENTS HISTORY ATTRIBUTES

Actions: Search by Billing Periods Billing Period: 01/30/2023 - 02/05/2023 Reference Nbr.: Contract Total: 70.00

Line Type	Inventory ID	Target Equipment ID	Billing Rule	Value	Recurring Item Price	Total Recurring Price	Overage Item Price	Remaining Period Value	Used Period Value	Scheduled Period Value	Project Task	Cost Code
> Service	CLEANING	FSE00006	Time	1 h 00 m	70.0000	70.00	85.0000	1 h 00 m	0 h 00 m	2 h 00 m		

Figure: The values indicating the used, scheduled, and remaining items for the billing period

[Service Contracts](#)

NOTESACTIVITIESFILESTOOLS

FCT00000001 - HM's Bakery & Cafe

←↻📄+🗑️📅⏮️⏪⏩⏭⋮

Service Contract ID: FCT00000001

Customer: HMBAKERY - HM's Bakery & Cafe

Location: MAIN - Primary Location

Customer Contract Nbr.: 000001

Project: X - Non-Project Code.

Master Contract:

Description: Cleaning Contract

Status: Active

Effective From Date: 1/30/2023

Upcoming Status: Expired


Effective Until Date: 1/29/2024

SUMMARYSCHEDULESSERVICES PER PERIODBILLING DOCUMENTSHISTORYATTRIBUTES

Actions: Search by Billing Periods Billing Period: 01/30/2023 - 02/05/2023 Reference Nbr.: Contract Total: 70.00

↻+×|⌂☑️

Line Type	Inventory ID	Target Equipment ID	Billing Rule	Value	Recurring Item Price	Total Recurring Price	Overage Item Price	Remaining Period Value	Used Period Value	Scheduled Period Value	Project Task	Cost Code
> Service	CLEANING	FSE00006	Time	1 h 00 m	70.0000	70.00	85.0000	0 h 00 m	1 h 00 m	1 h 00 m		

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Figure: The values indicating that the quantity of the item exceeds the quantity covered by the service contract

MRO 000057-1 - HM's Bakery & Cafe

Appointments | NOTES | ACTIVITIES | FILES | TOOLS

PAUSE COMPLETE ...

* Service Order ...	MRO - Main	Customer:	HIMBAKERY - HM's Bakery & Cafe	Estimated Duration:	1 h 00 m
Appointment N...	000057-1	* Location:	MAIN - Primary Location	Actual Duration:	1 h 00 m
Service Order ...	000057	* Branch Location:	WEST BRIGHTON - Office in West Bri	Actual Billable Total:	85.00
Status:	In Process	Service Contract:	FCT00000001 - Cleaning Contract	Actual Tax Total:	0.00
* Scheduled Sta...	2/4/2023	Contract Period:	01/30/2023 - 02/05/2023	Invoice Total:	85.00
* Actual Start D...	1/30/2023	Project:	X - Non-Project Code.	<input type="checkbox"/> Waiting for Purchased Items	
Description:	Service on cleaning of juicers				

SETTINGS DETAILS TAXES STAFF RESOURCE EQUIPMENT LOG FINANCIAL PROFITABILITY ATTRIBUTES TOTALS BILLING DOCUMENTS OTHER

Actual Amount	Free Item	Billable	Billable Quantity	Ext. Price	Ext. Cost	Discount Percent	Discount Amount	Billable Amount	Tax Category	Covered Quantity	Overage Quantity	Overage Unit Price	Mark for PO	PO Source	Vendor ID	Vendor Location ID	PO Nbr.	PO Status	Related Doc. Type	Related Doc. Nbr.
70.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.00	85.00	0.00	0.000000	0.0000	85.00	EXEMPT	0.00	1.00	85.0000	<input type="checkbox"/>							

Figure: The Used Period Value column

Service Contracts

FCT00000001 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

← ↻ + 🗑️ 📄 > < > >| ...

Service Contract ID: FCT00000001

Status: Active

Customer: HMBAKERY - HM's Bakery & Cafe

Effective From Date: 1/30/2023

* Location: MAIN - Primary Location

Upcoming Status: Expired

Customer Contract Nbr.: 000001

Effective Until Date: 1/29/2024

Project: X - Non-Project Code.

Master Contract:

Description: Cleaning Contract

SUMMARY SCHEDULES SERVICES PER PERIOD BILLING DOCUMENTS HISTORY ATTRIBUTES

Actions: Search by Billing Periods Billing Period: 01/30/2023 - 02/05/2023 Reference Nbr.: Contract Total: 70.00

🔄 + × ⏏️ ☑️

Line Type	* Inventory ID	Target Equipment ID	Billing Rule	Value	Recurring Item Price	Total Recurring Price	Overage Item Price	Remaining Period Value	Used Period Value	Scheduled Period Value	Project Task	Cost Code
> Service	CLEANING	FSE00006	Time	1 h 00 m	70.0000	70.00	85.0000	0 h 00 m	2 h 00 m	0 h 00 m		

Figure: The invoice for the first billing period of the service contract

Invoices and Memos

Invoice 000123 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

REMOVE HOLD

Type: Invoice

Reference Nbr.: 000123

Status: On Hold

* Date: 2/5/2023

* Post Period: 02-2023

Customer Ord...

Customer: HIMBAKERY - HM's Bakery & Cafe

* Location: MAIN - Primary Location

* Terms: 30D - 30 Days

* Due Date: 3/7/2023

* Cash Discount: 3/7/2023

* Project/Contract: X - Non-Project Code

Detail Total: 155.00

Discount Total: 0.00

Tax Total: 0.00

Balance: 155.00

Cash Discount: 0.00

Description: End-Period Plus Contract: FCT00000001 Cleaning Contract

DETAILS

FINANCIAL

ADDRESSES

TAXES

APPLICATIONS

COMPLIANCE

Inventory ID	Related Svc. Doc. Nbr.	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount	* Account	Description	Project Ta
CLEANING	FCT00000001	Contract Coverage: Service on cleaning of juicers	1.00	HOUR	85.0000	85.00	0.000000	0.00	85.00	40000	Sales Revenue	
CLEANING	FCT00000001	Contract Usage: Service on cleaning of juicers	1.00	HOUR	70.0000	70.00	0.000000	0.00	70.00	40000	Sales Revenue	

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Figure: The Invoiced and Active billing periods

Service Contracts

FCT00000001 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

Service Contract ID: FCT00000001 Status: Active

Customer: HMLBAKERY - HM's Bakery & Cafe Effective From Date: 1/30/2023

* Location: MAIN - Primary Location Upcoming Status: Expired

Customer Contract Nbr.: 000001 Effective Until Date: 1/29/2024

Project: X - Non-Project Code

Master Contract:

Description: Cleaning Contract

SUMMARY SCHEDULES SERVICES PER PERIOD BILLING DOCUMENTS HISTORY ATTRIBUTES

Actions: Search by Billing Periods Billing Period: 02/06/2023 - 02/12/2023 Reference Nbr.: Contract Total: 70.00

Line Type *Inventory ID Target Equipment ID Billing Rule

> Service CLEANING FSE00006 Time

Remaining Period Value Used Period Value Scheduled Period Value Project Task Cost Code

1 h 00 m 0 h 00 m 0 h 00 m

Select - Billing Period

SELECT

Billing Period Status Invoiced

01/30/2023 - ... Invoiced ☒

> 02/06/2023 - ... Active ☐



Day 3

Processing a Service Contract with a Beginning-Period Fixed Billing Type

Story

Suppose that the GoodFood One Restaurant customer has decided to sign an annual maintenance contract with the SweetLife Service and Equipment Sales Center for a fixed price, which will be billed at the beginning of each billing period (a month). The contract will cover the full assistance during the contract period. The list of services covered by the service contract has been agreed upon; it includes the cleaning of a customer's equipment twice a week on Monday and Friday. The service manager (Maia Davis) needs to create a service contract with fixed billing at the beginning of each month, and to add schedules for the generation of appointments.

Figure: An appointment generated for a service contract

Appointments

MRO 000058-1 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

START DEPART

* Service Order ... MRO - Main Customer: GOODFOOD - GoodFood One Restaurant Estimated Duration: 1 h 00 m
Appointment N... 000058-1 * Location: MAIN - Primary Location Actual Duration: 0 h 00 m
Service Order ... 000058 * Branch Location: WEST BRIGHTON - Office in West Bri Actual Billable Total: 0.00
Status: Not Started Service Contract: FCT00000007 - Maintenance contract Actual Tax Total: 0.00
* Scheduled Sta... 1/30/2023 Contract Period: 01/30/2023 - 02/27/2023 Invoice Total: 0.00
* Actual Start D... 1/30/2023 Project: X - Non-Project Code. ☐ Waiting for Purchased Items
Description: Maintenance contract

SETTINGS DETAILS TAXES STAFF RESOURCE EQUIPMENT LOG FINANCIAL PROFITABILITY ATTRIBUTES TOTALS BILLING DOCUMENTS OTHER

ADD ITEMS LOT/SERIAL NBRS ADD STAFF ACTIONS CREATE EXPENSE RECEIPT CREATE AP BILL All Records

Component Ref. Nbr.	Staff Member ID	Warranty	Warehouse	Location	UOM	Estimated Duration	Estimated Quantity	Unit Price	Manual Price	Unit Cost	Estimated Amount	Actual Duration	Actual Quantity	Actual Amount	Free Item	Billable	E	Q
<SPLIT>		<input checked="" type="checkbox"/>	EQUIPHOUSE	MAIN	HOURL	1 h 00 m	1.00	0.0000	<input type="checkbox"/>	0.0000	0.00	0 h 00 m	0.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		



Part 2: Route Management

Lesson 5: Route Management Configuration

Learning Objectives

In this lesson, you will learn how to do the following:

- Enable the Route Management feature
- Perform the minimum required configuration for the route management functionality
- Review a service order type with the Route behavior
- Create a driver skill and assign it to staff members
- Create a vehicle type
- Create vehicles
- Create an item class for route services and then create a route service
- Create two routes

Configuring Route Management

Story

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center. You are configuring the minimum required functionality to prepare the system for using the route management functionality.

Figure: Route Management feature

Enable/Disable Features TOOLS ▾

↶ MODIFY ENABLE

- ☐ Paperless Picking
- ☒ Advanced Picking
- ☒ Receiving
- ☒ Inventory Operations
- ☐ Cart Tracking
- ☒ Customer Management
 - ☒ Case Management
 - ☒ Duplicate Validation
 - ☒ Sales Quotes
 - ☐ Address Lookup Integration
- ☐ Customer Portal
 - ☐ B2B Ordering
 - ☐ Case Management on Portal
 - ☒ Financials on Portal
- ☒ Service Management
 - ☒ Equipment Management
 - ☒ Route Management
- ☒ Payroll
 - ☒ US Payroll
 - ☐ Canadian Payroll
- ☒ Platform
 - ☒ Monitoring & Automation
 - ☐ Approval Workflow

Figure: Creation of a Bing Maps key

Bing maps | Dev Center

My account ▾ Data sources ▾ Announcements Contacts & Info

My keys

Create key

Application name *

Application URL

Key type * [What's This](#)

Basic ▾

Application type *

Dev/Test ▾


[Create](#) [Cancel](#)

* Required field

To create Education, Broadcast or Not-for-Profit keys, please contact the Bing Maps account team at mpnet@microsoft.com.

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Figure: Created key

 Bing maps | Dev Center

My account ▾

Data sources ▾

Announcements

Contacts & Info


Hello

My keys

Key created successfully.

Click [here](#) to create a new key.

Click [here](#) to download complete list of keys.

View Specific Key: 



Application name	Key details	Enable Preview for All Keys 
V150	<p>Key: Show key</p> <p>Application Url:</p> <p>Key type: Basic / Dev/Test</p> <p>Created date: 05/20/2021</p> <p>Expiration date: None</p> <p>Key Status: Enabled</p> <p>Security Enabled: No</p>	<p>Update</p> <p>Copy key</p> <p>Usage Report</p> <p>Enable Security</p> <p>Enable Preview </p>

Figure: Bing Map API key inserted

Service Management Preferences

NOTES FILES TOOLS ▾

GENERAL **CALENDARS & MAPS** MAILING & PRINTING

CALENDAR SETTINGS

• Work Calendar: MAIN - Main Calendar ⓘ

Appointment Resize Precision: 30 MINUTES ▾

Appointment Auto-Confirm Time: 12 h 00 m

Number of Staff Members: 10

Show Service Orders in a Period Of: Days

MAP SETTINGS

Bing Map API Key: [REDACTED]

Refresh GPS Locations Every: 30 Seconds

History Time Accuracy: 15 Minutes

History Distance Accuracy: 5 Kilometers

☐ Show Location Tracking

DEFAULT CALENDAR SETTINGS

View Mode: Vertical ▾

Time Range: Day ▾

Time Filter: Cleared Filter ▾

Day Start Time: 7:00 AM ▾

Day End Time: ▾

Day Resolution: 16 ▾

Week Resolution: 12 ▾

Month Resolution: 10 ▾

Reviewing a Service Order Type with Route Behavior

Story

Suppose that SweetLife Equipment and Service Center is going to process route appointments. Acting as an administrative user of the company, you need to create a service order type with the Route behavior. You will then specify the new service order type as the default service order type on the Route Management Preferences (FS100400) form.

In this activity, you will review a service order type with the Route behavior that has been preconfigured in the U100 dataset instead of creating the type.

Creating and Assigning a Driver Skill

Story

Suppose that the SweetLife Service and Equipment Sales Center provides route services. The route services require the staff members to have driver skills, which should be assigned to employees in Acumatica ERP.

Acting as an administrative user of the company, you will create a driver skill and then assign it to an employee. As a result, the scheduler will be able to assign route appointments to an appropriate staff member.

In this training, you will review a driver skill that has been preconfigured in the U100 dataset, and you will assign this skill to an employee.

Figure: Skill assigned to a staff member

Employees

EP00000044 - Ricardo Martinez

NOTES FILES CUSTOMIZATION TOOLS

Employee ID: EP00000044 Status: Active

Employee Name: Ricardo Martinez

GENERAL HISTORY FINANCIAL ATTRIBUTES ACTIVITIES MAILING & PRINTING WORKGROUPS ASSIGNMENT AND APPROVAL MAPS DELEGATES USER CORPORATE CARDS **SKILLS**

Skill ID	Description	Driver Skill
REPAIRING	Repair of juicers	<input type="checkbox"/>
✓ DRIVING	Driving skill	<input checked="" type="checkbox"/>

Creating a Vehicle Type

Story

Suppose that the SweetLife Equipment and Service Center has multiple types of vehicles that they use for providing route services. To register the vehicles in the system, at least one vehicle type should be created, which will group vehicles with similar settings. Acting as an administrative user, you need to create a vehicle type record in Acumatica ERP.

Creating Vehicles

Story

Suppose that the SweetLife Equipment and Service Center has multiple types of vehicles that they use for providing route services. Acting as an administrative user, you need to create vehicle records in Acumatica ERP.

Figure: The selected Vehicle check box

Equipment
FSE00017 - White Ford

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS ▾

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Equipment Nbr.: FSE00017 ☒ Vehicle
Equipment Type: ☐ Target Equipment
Status: Active ☐ Resource Equipment
Serial Nbr.: 1234567890
Description: White Ford

Owner
☒ Company
☐ Customer
Customer:

Location
☐ Company
☒ Customer
Customer:
Location:

GENERAL VEHICLE INFO PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

Registered Date:
Registration N...
Barcode:
Tag Nbr.:
Sales Date:
Color:

MANUFACTURER INFO
Manufacturer:
Manufacturer ...
Manufacturing ...

INVENTORY INFO
Model Equipm...
Warehouse:
Warehouse Lo...
Model Serial N...

INSTALLATION INFO
Installation Date:
Service Order ...
Appointment N...

Creating an Item Class for Route Services and a Route Service

Story

Suppose that the SweetLife Service and Equipment Sales Center is going to provide route services. Acting as an administrative user, you will create the *ROUTE* route item class and the VISIT service.

Figure: New item class for route services

Item Classes

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Item Class Tree

- ALLOTHER** All Other
- BLADE**** Blade Holders
- CENTRIFJUC Centrifugal Juicers
- COACHING** Coaching
- COLDPRESS* Commercial Cold Press Juicers
- COMPUTERS* Computers and Accessories
- CONTAINER* Juicer Containers and Trays
- COVER***** Juicer Covers
- CPRESSCOMP Cold press juicer components
- DELIVERING Delivery Services
- FOOD***** Food Class
- FURNITURE* Office furniture and accessories
- INSTALLING Installation Services
- JAM***** Jam
- JCRCFGPRT* Parts of configurable juicers
- JCRSPRPRT* Juicer spare parts
- JUICER**** High Speed Juicers
- JUICERCFG* Configurable juicers
- JUICERLOW* Low Speed Juicers
- JUICERMED* Medium Speed Juicers
- LABOR***** Labor
- MFGEEXPENCE Expenses in manufacturing
- MJUICE**** Fruit and vegetable juices
- MNUTS***** Nuts
- MPC***** Basic Maintenance and Cleaning Services

* Class ID: ROUTE

Description: Route services

GENERAL REPLENISHMENT RESTRICTION GROUPS ATTRIBUTES SERVICE MANAGEMENT

GENERAL SETTINGS

☐ Stock Item

☐ Allow Negative Quantity

☐ Accrue Cost

☒ Export to External System

Item Type: Service

Valuation Method: Standard

Tax Category: EXEMPT - Exempt Tax Category

Posting Class: NONSTOCK - Non-Stock Items

Price Class:

Default Warehouse: EQUIPHOUSE - Warehouse for Equip

Availability Calculation ...

Country Of Origin:

INTERNATIONAL SHIPPING

Commodity Code Type:

Commodity Code:

SHIPPING THRESHOLDS

Undership Threshold (%): 100.00

Overship Threshold (%): 100.00

UNIT OF MEASURE

* Base Unit: HOUR

* Sales Unit: HOUR

* Purchase Unit: HOUR

☒ Divisible Unit

☒ Divisible Unit

☒ Divisible Unit

From Unit Multiply/Divide Conversion Factor To Unit

> MINUTE Multiply 0.016667 HOUR

PRICE MANAGEMENT

Price Workgro...

Price Manager:

Min. Markup %: 0.00

Markup %: 0.000000

Figure: Creation of the route service

Non-Stock Items
VISIT - Demonstration visit

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Item Sales Prices
Item Vendor Prices

Inventory ID: VISIT - Demonstration visit
Item Status: Active
Description: Demonstration visit

Product Workgroup:
Product Manager:

GENERAL PRICE/COST VENDORS CROSS-REFERENCE RELATED ITEMS PACKAGING GLACCOUNTS ATTRIBUTES DESCRIPTION SERVICE SKILLS SERVICE LICENSE TYPES

Template ID:

ITEM DEFAULTS

Item Class: ROUTE - Route services
Type: Service
* Posting Class: NONSTOCK - Non-Stock Items
☐ Is a Travel Item
* Tax Category: EXEMPT - Exempt Tax Category
Default Warehouse: EQUIPHOUSE - Warehouse for Equip
☒ Require Receipt
☒ Require Shipment
Close PO Line: By Amount

UNIT OF MEASURE

* Base Unit: HOUR
* Sales Unit: HOUR
* Purchase Unit: HOUR

☒ Divisible Unit
☒ Divisible Unit
☒ Divisible Unit

From Unit Multiply/Divid Conversion Factor To Unit

MINUTE Multiply 0.016667 HOUR

FIELD SERVICE DEFAULTS

Estimated Duration: 0 h 00 m
☒ Route Service

Figure: Route service

Services

CUSTOMIZATION ▾ TOOLS ▾

⌂ ↶ + ✎ 📑 🗑

Drag column header here to configure filter

	Inventory ID	Item Status	Type	Class ID	Estimated Duration	Billing Rule	Earning Type	Route Service
>	CLEANING	Active	Service	MRO	1 h 00 m	Time	RG	<input type="checkbox"/>
	DELIVERY	Active	Service	DELIVERING	0 h 30 m	Flat Rate	RG	<input checked="" type="checkbox"/>
	INSTALL	Active	Service	INSTALLING	1 h 00 m	Flat Rate		<input type="checkbox"/>
	REPAIR	Active	Service	MRO	1 h 00 m	Time		<input type="checkbox"/>
	TRAINING	Active	Service	TRAINING	0 h 45 m	Time		<input type="checkbox"/>
	VIDEOGUIDE	Active	Service	TRAINING	0 h 00 m			<input type="checkbox"/>
	VISIT	Active	Service	ROUTE	1 h 30 m	Time	RG	<input checked="" type="checkbox"/>
	WCLEAN	Active	Service	MRO	0 h 00 m			<input type="checkbox"/>
	WDISMANT	Active	Service	MRO	0 h 00 m			<input type="checkbox"/>
	WDISPOS	Active	Service	MRO	0 h 00 m			<input type="checkbox"/>

Creating a Route

Story

Suppose that the SweetLife Service and Equipment Sales Center plans to provide services on two routes, each of which has its own schedule. Acting as an administrative user, you will create two routes. The first route (ROUTE) can be executed on any working day by either of two drivers in your company. The second route (TU-ROUTE) can be executed only on Tuesdays, starting no earlier than 01:00 PM, and only one driver can execute this route.

Figure: Creation of the route

Routes

R-ROUTE - Regular route

NOTESFILESCUSTOMIZATIONTOOLS

←↺↻+🗑️📄⌵⏪⏩⏴⏵

* Route ID: R-ROUTE🔍

Origin Route: 🔍

Route Short:

* Description: Regular route

START LOCATION

END LOCATION

* Branch: SWEETEQUIP - Sen 🔍✎

* Branch: SWEETEQUIP - Sen 🔍✎

* Branch Location: WEST BRIGHTON - 🔍✎

* Branch Location: WEST BRIGHTON - 🔍✎


EXECUTION

EMPLOYEES

ATTRIBUTES

WEEK CODES

Day of Week	Start Time	Nbr. Trips per Day
<input type="checkbox"/> Sunday		0
<input checked="" type="checkbox"/> Monday	9:00 AM ▾	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Tuesday	9:00 AM ▾	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Wednesday	9:00 AM ▾	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Thursday	9:00 AM ▾	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Friday	9:00 AM ▾	<input type="text" value="1"/>
<input type="checkbox"/> Saturday		0

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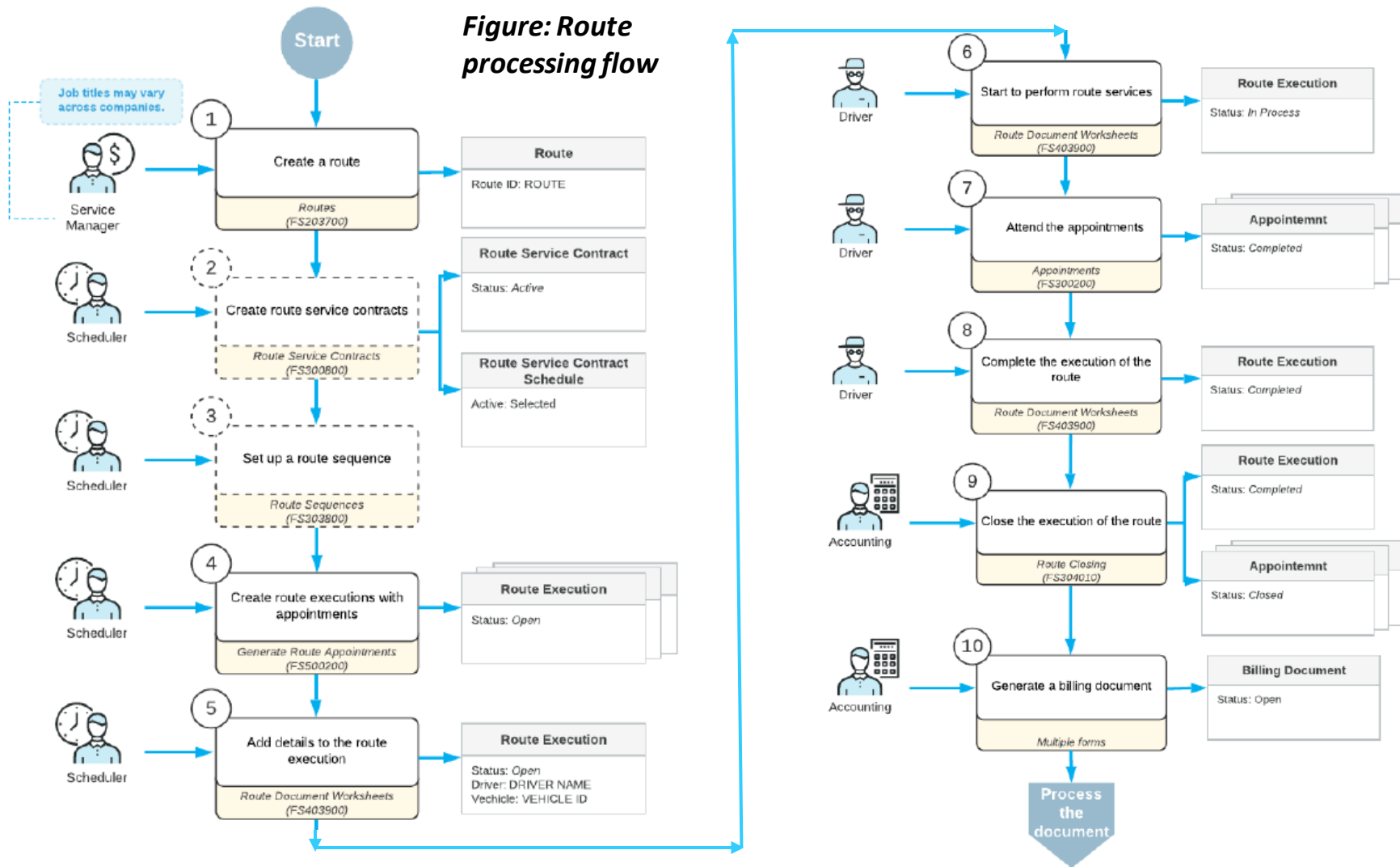
Lesson 6: Route Executions with Service Delivery

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a route execution document and add appointments to the route
- View the route on the map
- Modify the route execution document and edit the order of appointments in the route execution
- Start, complete, and close route execution
- Run route appointment billing

Figure: Route processing flow



Creating a Route Execution with Appointments

Story

Suppose that the HM's Bakery & Cafe customer has requested the juicer demonstration service, which will be performed at the customer's location. Acting as a service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center, you will create a route execution document that includes one trip to the HMBAKERY customer for the demonstration. You will schedule the route for a specific day and time (next Thursday at 10:00 AM) and add the route appointment, where you will select the customer and the service to be performed. You will also view the route on a map.

Figure: Creation of a route execution document

Route Document Details

Regular route

NOTES ACTIVITIES FILES TOOLS

← ↺ ↻ + ↻ >| ☒ ...

Route Nbr.: <NEW>

* Branch: SWEETEQUIP - Sen

* Route: R-ROUTE - Regular 1

Trip Nbr.: 1

* Schedule Start: 2/2/2023 10:00 AM 2

Status: Open

Driver: EP00000005 - Peter DRIVER SELECTOR 3

Additional Driver:

Vehicle: FSE00017 - White Fr VEHICLE SELECTOR 4

Additional Vehi:

Additional Vehi:

ROUTE STATISTICS

Number of App...

Total Services:

Total Distance ... unavailable

Total Services ... 0 h 00 m

Total Driving D... 0 h 00 m

Total Route Du... 0 h 00 m

[*] Approximate values. Use for reference

ACTUAL TIME

Actual Start Date:

Actual End Date:


Actual Duration:

APPOINTMENTS

ADDITIONAL INFO ATTRIBUTES LOCATION

↺ + × ↑ ↓ REASSIGN ⇄

Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time
--------------------	----------------------------	------------------------	--------------------	------------------	-------------	-------------	-------------	--------	------------------------	------------------------	----------------------

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Figure: Staff Calendar Board

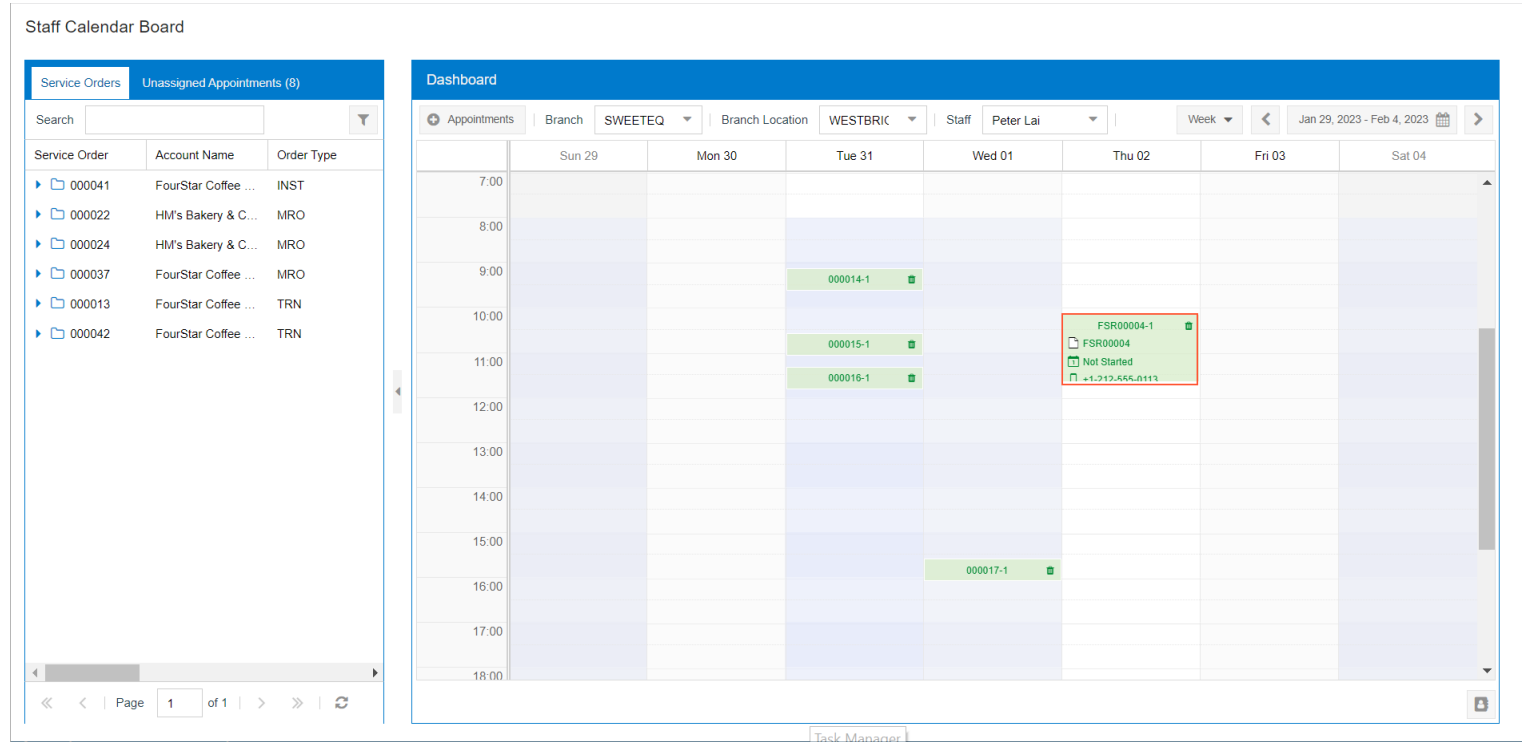
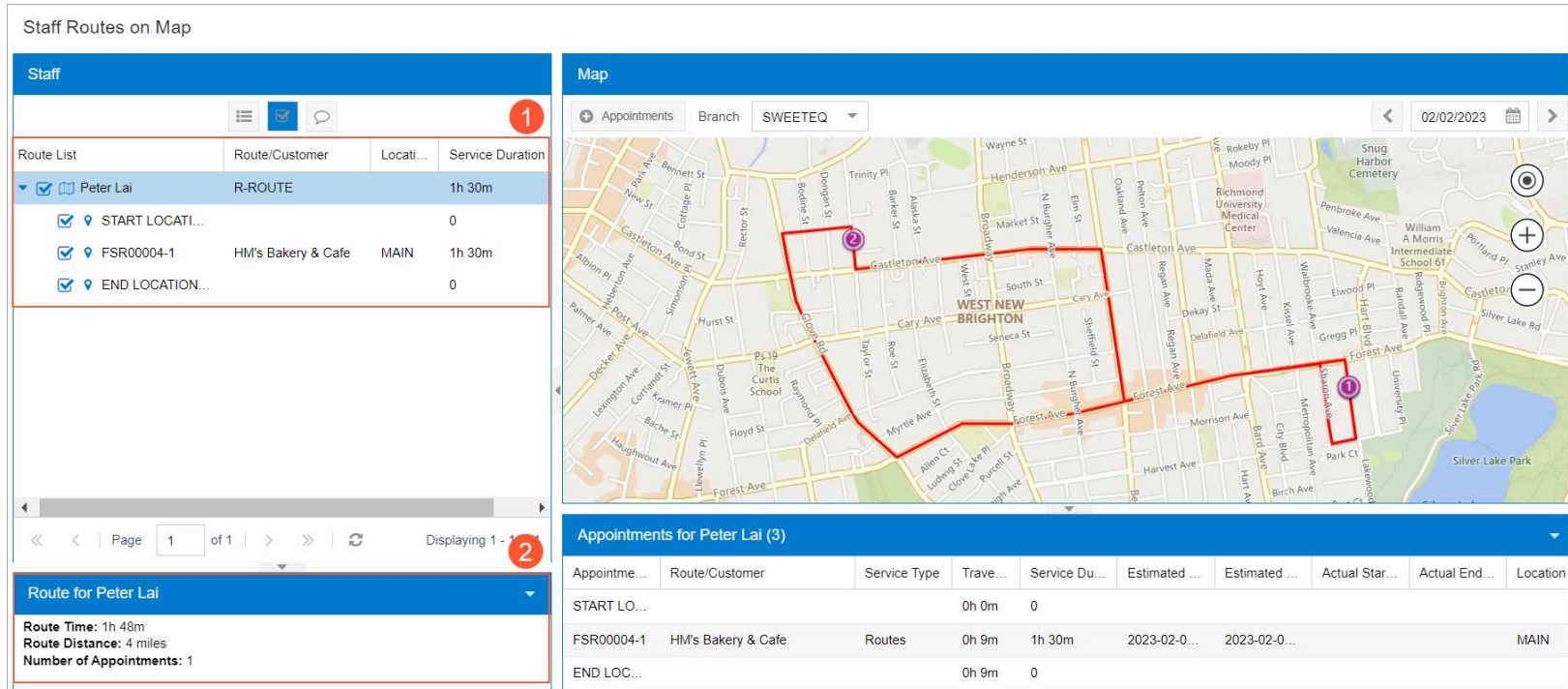


Figure: Appointment details



Modifying the Route Execution

Story

Suppose that the Thai Food Restaurant customer has requested the juicer demonstration service to be performed at the customer's location. At the same time, the HM's Bakery & Cafe customer has requested to change the date of the service that has been scheduled for them, and the route execution document has been created. Also suppose that another route execution has been scheduled for the GoodFood One Restaurant customer on the next Tuesday.

A service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center analyzed the route execution dates, confirmed them with the customers, and decided to combine these route executions to be performed within one route execution because they were requested for the same day. Acting as this service manager, you will modify the date in the route execution previously created for the HM's Bakery & Cafe customer, add an additional appointment for the Thai Food Restaurant customer, and reassign a route appointment for the GoodFood One Restaurant customer from one route execution to another one.

Figure: Scheduled date and time of the appointment

Route Document Details
FSR00003 - Regular route

Route Nbr.: FSR00003
Branch: SWEETEQUIP - Service
Route: R-ROUTE - Regular route
Trip Nbr.:
Schedule Start: 2/7/2023 9:00 AM
Status: Open
Driver: EP00000005 - Peter
Additional Driver:
Vehicle: FSE00010 - White Fr
Additional Vehi...
Additional Vehi...

DRIVER SELECTOR

VEHICLE SELECTOR

ROUTE STATISTICS
ACTUAL TIME

Number of App... 1
Actual Start Date:
Total Services: 1
Actual End Date:
Total Distance ... 3.41 mi
Actual Duration:
Total Services ... 1 h 30 m
Total Driving D... 0 h 17 m
Total Route Du... 1 h 47 m

[*] Approximate values. Use for reference

APPOINTMENTS
ADDITIONAL INFO
ATTRIBUTES
LOCATION

Service Order Type
Source Service Contract ID
Customer Contract Nbr.
Source Schedule ID
Appointment Nbr.
Description
Customer ID
Location ID
Status
Scheduled Start Date
Scheduled Start Time
Scheduled End Time

ROUT
FSR00004-1
Demonstration of goods for prospective cu...
HIMBAKERY - HM...
MAIN
Not Started
2/7/2023
9:08 AM
10:38 AM

Figure: Appointment added to the route execution document

Route Document Details
FSR00003 - Regular route
NOTES
ACTIVITIES
FILES
TOOLS

←
↶
↷
+
-
↺
↻
OPEN ROUTE ON MAP
OPEN DRIVER CALENDAR
...

Route Nbr.: FSR00003
Branch: SWEETEQUIP - Service
Route: R-ROUTE - Regular rou
Trip Nbr.: 1
Schedule Start: 2/7/2023 9:00 AM
Status: Open
Driver: EP00000005 - Peter
Additional Driver:
Vehicle: FSE00010 - White Fr
Additional Vehi...
Additional Vehi...

ROUTE STATISTICS
Number of App... 2
Total Services: 2
Total Distance ... 45.59 mi
Total Services ... 3 h 00 m
Total Driving D... 3 h 19 m
Total Route Du... 6 h 19 m
[*] Approximate values. Use for reference

ACTUAL TIME
Actual Start Date:
Actual End Date:
Actual Duration:

APPOINTMENTS
ADDITIONAL INFO
ATTRIBUTES
LOCATION

↺
+
x
↑
↓
REASSIGN
|←|
☒

	Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Sched End T
>	ROUT				FSR00004-1	Demonstration of goods for prospective cu...	HIMBAKERY - HM...	MAIN	Not Started	2/7/2023	9:08 AM	10:38
	ROUT				FSR00005-1	Juicer Demonstration	TOMYUM - Thai E...	MAIN	Not Started	2/7/2023	12:03 PM	1:33 P

Figure: Route on map

Staff Routes on Map

Staff

Route List

Route/Customer

Locati...

Service Dura

▼

☑

📖

Peter Lai

R-ROUTE

3h 0m

☑

📍

START LOCA...

0

☑

📍

FSR00004-1

HM's Bakery & Cafe

MAIN

1h 30m

☑

📍

FSR00005-1

Thai Food Restaurant

MAIN

1h 30m

☑

📍

END LOCATI...

0

Page 1 of 1

Displaying 1 - 1 of 1

Route for Peter Lai

Route Time: 4h 30m

Route Distance: 51 miles

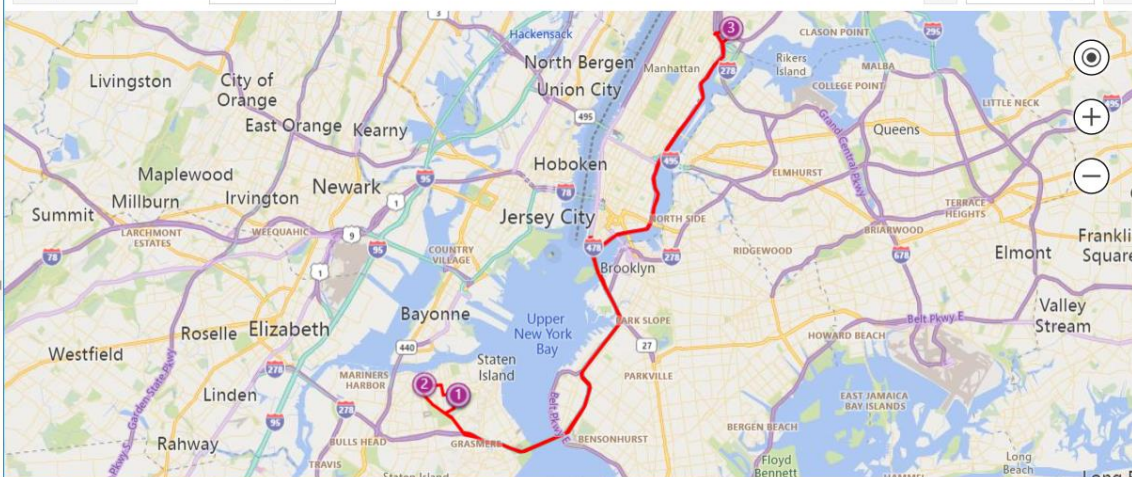
Number of Appointments: 2

Map

Appointments

Branch SWEETEQ

02/07/2023



Appointments for Peter Lai (4)

Appointme...	Route/Customer	Service Type	Trave...	Service Du...	Estimated ...	Estimated ...	Actual Star...	Actual End...	Location
START LO...			0h 0m	0					

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Figure: Driver Selector dialog box displaying both available drivers for the route

Route Document Details
Tuesday route

Route Nbr.: <NEW>
Branch: SWEETEQUIP - Ser
Route: TU-ROUTE - Tuesda
Trip Nbr.: 1
Schedule Start: 2/7/2023 3:00 PM
Status: Open
Driver: DRIVER SELECTOR
Additional Driver: VEHICLE SELECTOR
Vehicle: VEHICLE SELECTOR
Additional Vehi...
Additional Vehi...

ROUTE STATISTICS
Number
Total Se
Total Dis
Total Se
Total Dr
Total Ro
[*] App

Driver Selector

Route Nbr.: <NEW>
ROUTE INFO
Route ID: TU-ROUTE
Schedule Start: 2/7/2023
CURRENT SELECTION
Driver:
Vehicle:

FILTER OPTIONS
☐ Show Available Drivers for this Route only

* Employee ID	Employee Name	Already Assigned	Priority
EP00000005	Peter Lai	<input checked="" type="checkbox"/>	1
EP00000045	Luke Cole	<input type="checkbox"/>	1

SELECT DRIVER CLOSE

APPOINTMENTS
Service Order Type
Source Service Contract ID
Customer Contract Nbr.
Source Schedule ID
Appointment

* Scheduled Start Date
* Scheduled Start Time
* Scheduled End Time
Estimated Duration
Address Line

Figure: Reassigned appointment

Route Document Details

FSR00003 - Regular route

OPEN ROUTE ON MAP

OPEN DRIVER CALENDAR

Route Nbr.: FSR00003

Branch: SWEETEQUIP - Service

Route: R-ROUTE - Regular rou

Trip Nbr.: 1

Schedule Start...: 2/7/2023 9:00 AM

Status: Open

Driver: EP00000005 - Peter

Additional Driver:

Vehicle: FSE00010 - White Fr

Additional Vehi...

Additional Vehi...

ROUTE STATISTICS

Number of App... 3

Total Services: 3

Total Distance ... 45.97 mi

Total Services ... 4 h 30 m

Total Driving D... 3 h 28 m

Total Route Du... 7 h 58 m

[*] Approximate values. Use for reference

ACTUAL TIME

Actual Start Date:

Actual End Date:

Actual Duration:

APPOINTMENTS

ADDITIONAL INFO

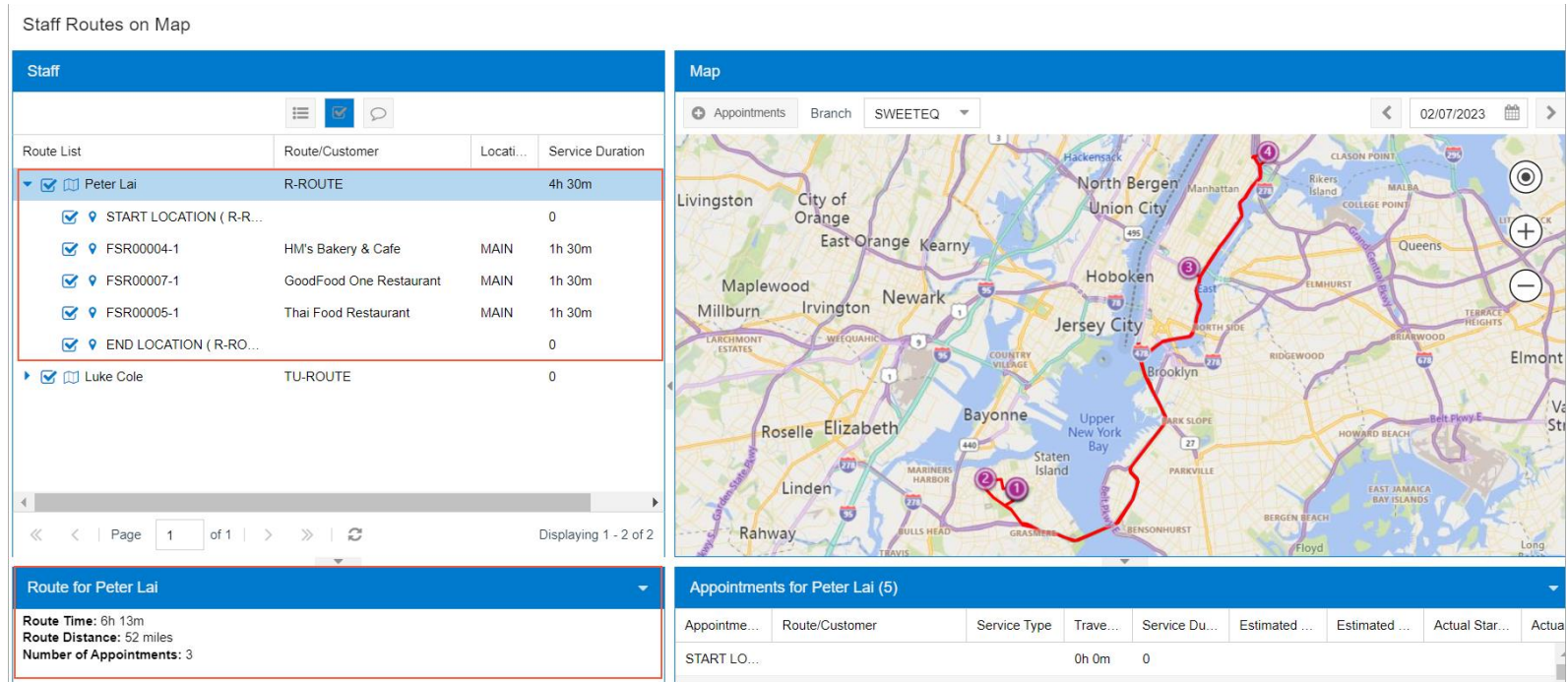
ATTRIBUTES

LOCATION

REASSIGN

		Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time	Estimated Duration	Ad
		ROUT				FSR00004-1	Demonstration of goods for prospective cu...	HIMBAKERY - HM...	MAIN	Not Started	2/7/2023	9:08 AM	10:38 AM	1 h 30 m	40
		ROUT				FSR00005-1	Juicer Demonstration	TOMYUIM - Thai E...	MAIN	Not Started	2/7/2023	12:03 PM	1:33 PM	1 h 30 m	34
>		ROUT				FSR00007-1	Juicer Demonstration	GOODFOOD - Go...	MAIN	Not Started	2/7/2023	2:03 PM	3:33 PM	1 h 30 m	111

Figure: Modified route execution



Processing the Route Execution

Story

Suppose that you are a staff member of the SweetLife Service and Equipment Sales Center. Acting as a staff member, you will start the route execution, attend the appointments, enter the actual time and date the appointments have been carried out, and complete the execution of the route. Acting as a service manager, you will close the appointment. (To ease the training process, you will not sign out and sign in as each involved employee.

In production, however, the drivers start and complete the route executions assigned to them.)

Figure: Start menu command

Route Document Details
FSR00003 - Regular route

NOTES ACTIVITIES FILES TOOLS

OPEN ROUTE ON MAP OPEN DRIVER CALENDAR

Route Nbr.: FSR00003
Branch: SWEETEQUIP - Service
Route: R-ROUTE - Regular rou
Trip Nbr.: 1
Schedule Start: 2/7/2023 9:00 AM
Status: Open
Driver: EP00000005 - Peter DRIVER SELECTOR
Additional Driver:
Vehicle: FSE00010 - White Fi VEHICLE SELECTOR
Additional Vehi...
Additional Vehi...

ROUTE STATISTICS

Number of App... 3
Total Services: 3
Total Distance ... 45.97 mi
Total Services ... 4 h 30 m
Total Driving D... 3 h 28 m
Total Route Du... 7 h 58 m
[*] Approximate values. Use for reference

Processing

- ☆ Start
- Complete
- Cancel

Other

- Open Route On Map
- Open Driver Calendar
- Calculate Route Statistics

Corrections

- Reopen
- Unclose
- Delete

APPOINTMENTS ADDITIONAL INFO ATTRIBUTES LOCATION

REASSIGN

	Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Sc St
>	ROUT				FSR00004-1	Demonstration of goods for prospective cu...	HIMBAKERY - HM...	MAIN	Not Started	2/7/2023	9:0
	ROUT				FSR00007-1	Juicer Demonstration	GOODFOOD - Go...	MAIN	Not Started	2/7/2023	11:
	ROUT				FSR00005-1	Juicer Demonstration	TOMYUM - Thai F...	MAIN	Not Started	2/7/2023	1:4

Figure: Completed appointment

Route Document Details

FSR00003 - Regular route

NOTES ACTIVITIES FILES TOOLS

OPEN ROUTE ON MAP OPEN DRIVER CALENDAR

Route Nbr.: FSR00003

Branch: SWEETEQUIP - Service

Route: R-ROUTE - Regular rou

Trip Nbr.: 1

Schedule Start... 2/7/2023 9:00 AM

Status: In Process

Driver: EP00000005 - Peter DRIVER SELECTOR

Additional Driver:

Vehicle: FSE00010 - White Fi VEHICLE SELECTOR

Additional Vehi...

Additional Vehi...

ROUTE STATISTICS

Number of App... 3

Total Services: 3

Total Distance ... 45.97 mi

Total Services ... 4 h 30 m

Total Driving D... 3 h 28 m

Total Route Du... 7 h 58 m

[*] Approximate values. Use for reference

ACTUAL TIME

Actual Start Date:

Actual End Date:

Actual Duration:

APPOINTMENTS ADDITIONAL INFO ATTRIBUTES LOCATION

REASSIGN

	Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time	Estimated Duration	Address Line
>	ROUT				FSR00004-1	Demonstration of goods for prospective cu...	HIMBAKERY - HM...	MAIN	Completed	2/7/2023	9:08 AM	10:38 AM	1 h 30 m	4056 Taylor
	ROUT				FSR00007-1	Juicer Demonstration	GOODFOOD - Go...	MAIN	Not Started	2/7/2023	11:51 AM	1:21 PM	1 h 30 m	111 E 36th S
	ROUT				FSR00005-1	Juicer Demonstration	TOMYUM - Thai F...	MAIN	Not Started	2/7/2023	1:43 PM	3:13 PM	1 h 30 m	341 E 138th

Figure: Completed route execution

Route Document Details
FSR00003 - Regular route

NOTES ACTIVITIES FILES TOOLS

OPEN ROUTE ON MAP OPEN DRIVER CALENDAR

Route Nbr.: FSR00003
Branch: SWEETEQUIP - Service
Route: R-ROUTE - Regular rou
Trip Nbr.: 1
Schedule Start: 2/7/2023 9:00 AM
Status: **Completed**
Driver: EP00000005 - Peter DRIVER SELECTOR
Additional Driver:
Vehicle: FSE00010 - White Fr VEHICLE SELECTOR
Additional Vehi...
Additional Vehi...

ROUTE STATISTICS
Number of App... 3
Total Services: 3
Total Distance ... 45.97 mi
Total Services ... 4 h 30 m
Total Driving D... 3 h 28 m
Total Route Du... 7 h 58 m
[*] Approximate values. Use for reference

ACTUAL TIME
Actual Start Date:
Actual End Date:
Actual Duration:

APPOINTMENTS ADDITIONAL INFO ATTRIBUTES LOCATION

		Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time	Estimated Duration	Address Line
>		ROUT				FSR00004-1	Demonstration of goods for prospective cu...	HIMBAKERY - HIM...	MAIN	Completed	2/7/2023	9:08 AM	10:38 AM	1 h 30 m	4056 Taylor :
		ROUT				FSR00007-1	Juicer Demonstration	GOODFOOD - Gg...	MAIN	Completed	2/7/2023	11:51 AM	1:21 PM	1 h 30 m	111 E 36th S
		ROUT				FSR00005-1	Juicer Demonstration	TOMYUM - Thai F...	MAIN	Completed	2/7/2023	1:43 PM	3:13 PM	1 h 30 m	341 E 138th

Generating Invoices for Route Appointments

Story

Acting as an accountant of the SweetLife company, you will run billing for route appointments, including appointments that were closed in the previous step. The appointments are of the ROUT service order type that is defined to generate the sales invoice.

Figure: The appointments to be billed

Run Appointment Billing TOOLS ▾

↺ ↻ PROCESS PROCESS ALL 🔄 🔍 🗑️ 🔎

FILTERING OPTIONS

Generated Billing Docu...: SO Invoices ▾

Billing Cycle: 🔍

Billing Customer: 🔍

Up to Date: 2/7/2023 ▾

☐ Ignore the Time Frame

BILLING OPTIONS

Billing Date: 2/7/2023 ▾

* Billing Period: 02-2023 🔍

🔍	🔍	🔍	Service Order Type	Appointment Nbr.	Billing Customer ID	Billing Location	Billing Cycle ID	Cut-Off Date	Service Order Nbr.	Actual Start Date	Actual Start Time	Actual End Time	Branch Location ID	Status	Description
🔍	🔍	<input type="checkbox"/>	INST	000005-1	RETSALE - Individual Retail...	MAIN	AP MONDAY	1/28/2023	000005	1/23/2023	3:00 PM	4:00 PM	WEST BRIGHTON	Closed	Installation of equipment
🔍	🔍	<input type="checkbox"/>	INST	000005-2	RETSALE - Individual Retail...	MAIN	AP MONDAY	1/28/2023	000005	1/28/2023	9:00 AM	9:45 AM	WEST BRIGHTON	Closed	Installation of equipment
🔍	🔍	<input type="checkbox"/>	INST	000006-1	TOMYUM - Thai Food Resta...	MAIN	AP SQ	1/24/2023	000006	1/24/2023	9:00 AM	10:00 AM	WEST BRIGHTON	Closed	Installation of equipment
🔍	🔍	<input type="checkbox"/>	INST	000006-2	TOMYUM - Thai Food Resta...	MAIN	AP SQ	1/28/2023	000006	1/28/2023	10:00 AM	10:45 AM	WEST BRIGHTON	Closed	Installation of equipment
🔍	🔍	<input type="checkbox"/>	MRO	000007-1	RETSALE - Individual Retail...	MAIN	AP MONDAY	1/28/2023	000007	1/28/2023	11:00 AM	12:00 PM	WEST BRIGHTON	Closed	Service on cleaning of ju
🔍	🔍	<input type="checkbox"/>	MRO	000008-1	TOMYUM - Thai Food Resta...	MAIN	AP SQ	1/28/2023	000008	1/28/2023	2:00 PM	3:00 PM	WEST BRIGHTON	Closed	Service on cleaning of ju
🔍	🔍	<input type="checkbox"/>	MRO	000009-1	GOODFOOD - GoodFood Q...	MAIN	AP AP	1/28/2023	000009	1/28/2023	2:00 PM	2:45 PM	WEST BRIGHTON	Closed	Training on juicer usage
🔍	🔍	<input type="checkbox"/>	MRO	000009-2	GOODFOOD - GoodFood Q...	MAIN	AP AP	1/28/2023	000009	1/28/2023	5:00 PM	6:00 PM	WEST BRIGHTON	Closed	Training on juicer usage
●	🔍	<input checked="" type="checkbox"/>	ROUT	FSR00004-1	HIMBAKERY - HIM's Bakery...	MAIN	AP AP	2/7/2023	FSR00004	2/7/2023	9:08 AM	10:38 AM	WEST BRIGHTON	Closed	Demonstration of goods
●	🔍	<input checked="" type="checkbox"/>	ROUT	FSR00005-1	TOMYUM - Thai Food Resta...	MAIN	AP SQ	2/7/2023	FSR00005	2/7/2023	1:43 PM	3:13 PM	WEST BRIGHTON	Closed	Juicer Demonstration
●	🔍	<input checked="" type="checkbox"/>	ROUT	FSR00007-1	GOODFOOD - GoodFood Q...	MAIN	AP AP	2/7/2023	FSR00007	2/7/2023	11:51 AM	1:21 PM	WEST BRIGHTON	Closed	Juicer Demonstration



Day 4

Industrial Specialty Services
Acumatica Customer

Lesson 7: Route Executions with Item Delivery

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a pickup route service
- Create a delivery route service
- Create a route execution document
- Add appointments to the route
- Start, complete, and close route executions

Creating Pickup and Delivery Route Services

Story

Suppose that the SweetLife Service and Equipment Sales Center has decided to provide route services that involve pickup or delivery of stock items. Acting as an administrative user of the company, you will create route services in the system with special configuration settings. That is, you will create services based on the ROUTE item class, and on the **Pickup/Delivery** Item tab of the Non-Stock Items (IN202000) form, you will specify the needed action in the **Pickup/Delivery** Action box, and the stock items to be delivered or picked up.

Figure: The created route services

Services

CUSTOMIZATION ▾ TOOLS ▾






⌂ ↶ + ✎ ⌵ ☒

Drag column header here to configure filter

	Inventory ID	Item Status	Type	Class ID	Estimated Duration	Billing Rule	Earning Type	Route Service
>	CLEANING	Active	Service	MRO	1 h 00 m	Time	RG	<input type="checkbox"/>
	DELIVERY	Active	Service	DELIVERING	0 h 30 m	Flat Rate	RG	<input checked="" type="checkbox"/>
	INSTALL	Active	Service	INSTALLING	1 h 00 m	Flat Rate		<input type="checkbox"/>
	PICK_JUIACC	Active	Service	ROUTE	0 h 30 m		RG	<input checked="" type="checkbox"/>
	REPAIR	Active	Service	MRO	1 h 00 m	Time		<input type="checkbox"/>
	SUPP_JUIACC	Active	Service	ROUTE	0 h 30 m		RG	<input checked="" type="checkbox"/>
	TRAINING	Active	Service	TRAINING	0 h 45 m	Time		<input type="checkbox"/>
	VIDEOGUIDE	Active	Service	TRAINING	0 h 00 m			<input type="checkbox"/>
	VISIT	Active	Service	ROUTE	1 h 30 m		RG	<input checked="" type="checkbox"/>
	WCLEAN	Active	Service	MRO	0 h 00 m			<input type="checkbox"/>
	WDISMANT	Active	Service	MRO	0 h 00 m			<input type="checkbox"/>
	WDISPOS	Active	Service	MRO	0 h 00 m			<input type="checkbox"/>

Figure: Availability of stock item

Inventory Summary CUSTOMIZATION TOOLS

* Inventory ID: Warehouse:
Location:

Warehouse	Location	Available	Available for Shipment	SO Booked	SO Allocated	SO Shipped	SO Back Ordered	Purchase Orders	On Hand	FS Prepared	FS Booked	FS Allocated	FS to Purchase	Purchase for FS	Purchase FS Prep
> EQUIPHOUSE	MAIN	10.00	10.00	0.00	0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	C
	Total:	10.00	10.00	0.00	0.00	0.00	0.00	0.00	10.00	0.00	0.00	0.00	0.00	0.00	C

Processing Pickup and Delivery Route Services

Story

Suppose that the HM's Bakery & Cafe customer has requested a service of the delivery of 10 juicer containers each Wednesday. Acting as a service manager of the SweetLife Service and Equipment Sales Center, you will create a route execution with a route appointment that you will schedule for the delivery of juicer accessories. For the appointment, you will select the *SUPP JUIACC - Delivery of juicer accessories* service and specify that you are transferring 10 *CONTAINER* units.

Lesson 8: Route Service Contracts

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a route for the service contract, and then create a service contract
- Create a schedule for the route service contract
- Specify the order in which the 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 to them

Creating Route Service Contracts

Story

Suppose that the GOODFOOD (GoodFood One Restaurant) customer requires weekly appointments on each Friday for one year, starting next week. The service to be performed is PICK JUIACC - Juicer accessories pick up. Another customer—TOMYUM (Thai Food Restaurant)—also requires a weekly delivery of juicer supplies (the SUPP JUIACC service). Acting as a service manager (in this training course, this employee is responsible for managing service contracts in Acumatica ERP), you will create service contracts and generate schedules for both customers.

Figure: The Route tab on the Route Service Contract Schedules form

Route Service Contract Schedules
FCT00000005 - GoodFood One Restaurant

NOTES FILES CUSTOMIZATION TOOLS

GENERATE ROUTE APPOINTMENTS

* Service Contract ID: FCT00000005
Schedule ID: <NEW> ☒ Active
Customer: GOODFOOD - GoodFood One F
Location: MAIN - Primary Location
Customer Contract Nbr.: 000002
Project: X - Non-Project Code.
* Service Order Type: ROUT - Routes
Schedule Generation T...: Appointments

Schedule Duration: 0 h 30 m ☐ Override
* Start Date: 2/6/2023
Expiration Date: 2/5/2024
Next Execution Date:
Last Generated:

ADDITIONAL SETTINGS

Week Codes e.g.: 1, 2...
Vendor:

DETAILS RECURRENCE ATTRIBUTES **ROUTE** WEEK CODES FORECAST DELIVERY NOTES INTERNAL NOTES

ROUTE SETTINGS

* Route ID: FR-ROUTE - Friday route NY
Order:

Specifying the Route Order

Story

Suppose that two customers (TOMYUM - Thai Food Restaurant and GOODFOOD - GoodFood One Restaurant) are scheduled to be visited on the same day as part of the same route (FR-ROUTE)—that is, the appointments will be generated automatically according to the route contract schedules. The system automatically defines the sequence in which the customers will be visited.

Suppose that you need to change the default order of appointments. Acting as a service manager of the SweetLife Service and Equipment Sales Center, you will change the order in which appointments will be generated for the route.

Figure: Updated route sequence

Route Sequences

CUSTOMIZATION TOOLS ▾

↶ 📄 RESET SEQUENCE

* Route: 🔍

☐ Display active Service Contracts only

☐ Display active Schedules only

🔄 ⏮ ⏭ ⏭ ⏭

	Order	Customer	Location	Location Name	Address	City	State	Service Contract ID	Customer Contract Nbr.	Description	Service Contract Status	
🔍	📄	00005	TOMYUM - Thai Food Restaurant	MAIN	Primary Location	341 E 138th St	New York	NY	FCT00000006	000001	Juicer accessories delivery	Active
>	🔍	00010	GOODFOOD - GoodFood One Restaurant	MAIN	Primary Location	111 E 36th St	New York	NY	FCT00000005	000002	Juicer Accessories Pickup	Active

Figure: Updated order numbers

Route Sequences

CUSTOMIZATION TOOLS ▾

↶ 📄 RESET SEQUENCE

* Route: ☐ Display active Service Contracts only
☐ Display active Schedules only

🔄 ⏮ ⏭ ⏮ ⏭

	Order	Customer	Location	Location Name	Address	City	State	Service Contract ID	Customer Contract Nbr.	Description	Service Contract Status
🔍	00010	TOMYUM - Thai Food Restaurant	MAIN	Primary Location	341 E 138th St	New York	NY	FCT00000006	000001	Juicer accessories delivery	Active
>	00020	GOODFOOD - GoodFood One Restaurant	MAIN	Primary Location	111 E 36th St	New York	NY	FCT00000005	000002	Juicer Accessories Pickup	Active

Generating Route Appointments

Story

Acting as a service manager of the SweetLife Service and Equipment Sales Center, you need to process the generation of route appointments for a particular route. The route includes appointments for two customers.

Figure: Route service contract schedules that match the selection criteria

Generate Route Appointments CUSTOMIZATION TOOLS ▾

↶ PROCESS PROCESS ALL ↷

FILTERS OPTIONS

Route:

GENERATION OPTIONS

Generate from:

Generate Up To:

SCHEDULES RUN HISTORY GENERATION ERROR LOG

🔄 📅 🗑️ All Records ▾ 🔍

			Customer	Service Contract ID	Customer Contract Nbr.	Description	Location	Location Name	Recurrence Description	Schedule ID	Schedule Start Date	Schedule Expiration Date	Last Generated
>	🔍	📅	<input type="checkbox"/>	GOODFOOD - GoodFoo...	FCT00000005	000002	Juicer Accessories Pickup	MAIN	Primary Location	Occurs every 1 week(s) on Friday.	FSC00000006	2/6/2023	2/5/2024
	🔍	📅	<input type="checkbox"/>	TOMYUM - Thai Food R...	FCT00000006	000001	Juicer accessories delivery	MAIN	Primary Location	Occurs every 1 week(s) on Friday.	FSC00000007	2/6/2023	2/5/2024

Assigning a Driver and a Vehicle to a Route Execution

Story

Acting as a service manager of the SweetLife Service and Equipment Sales Center responsible for managing service contracts, you will assign a driver and a vehicle to the route execution with two appointments generated for the service contract.

Figure: Assigning a driver

Route Document Worksheets CUSTOMIZATION TOOLS ▾

🔄 ↶ + ✎ 📏 🗑️ 🔍

From: 1/30/2023 ▾
To: 2/10/2023 ▾
Driver:

2 **3**
ASSIGN DRIVER **ASSIGN VEHICLE**

		Route Nbr.	Route ID	Route Short	Trip Nbr.	Status	Date	Start Time	Driver	Additional Driver	Vehicle	Additional Vehicle 1	Additional Vehicle 2	Number of Appointments	Total Services	Total Driving Duration	Total Services Duration	Total Route Duration
🔍	🗑️	FSR00001	NY2		1	Open	1/31/2023	9:00 AM	EP00000005 - Peter Lai		FSE00003			3	3	2 h 34 m	1 h 30 m	4 h 04 m
🔍	🗑️	FSR00002	NY		1	Open	2/1/2023	3:00 PM	EP00000005 - Peter Lai		FSE00004			1	1	1 h 10 m	0 h 30 m	1 h 40 m
1 🔍	🗑️	FSR00006	TU-ROUTE		1	Open	2/7/2023	3:00 PM	EP00000045 - Luke Cole		FSE00011			0	0	0 h 00 m	0 h 00 m	1 h 30 m
>	🗑️	FSR00011	FR-ROUTE		1	Open	2/10/2023	9:00 AM						2	2	3 h 31 m	1 h 00 m	4 h 31 m

Figure: Route execution document with assigned driver and vehicle

Route Document Details
FSR00011 - Friday route NY
NOTES
ACTIVITIES
FILES
CUSTOMIZATION
TOOLS

OPEN ROUTE ON MAP
OPEN DRIVER CALENDAR
...

Route Nbr.: FSR00011
Branch: SWEETEQUIP - Service
Route: FR-ROUTE - Friday rou
Trip Nbr.: 1
Schedule Start: 2/10/2023 9:00 AM
Status: Open
Driver: EP00000005 - Peter
Additional Driver:
Vehicle: FSE00011 - Brown N
Additional Vehi...
Additional Vehi...

ROUTE STATISTICS
Number of App... 2
Total Services: 2
Total Distance ... 44.89 mi
Total Services ... 1 h 00 m
Total Driving D... 3 h 31 m
Total Route Du... 4 h 31 m

ACTUAL TIME
Actual Start Date:
Actual End Date:
Actual Duration:

[*] Approximate values. Use for reference

APPOINTMENTS
ADDITIONAL INFO
ATTRIBUTES
LOCATION

REASSIGN

			Service Order Type	Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time	Estir Dura
>			ROUT	FCT00000006	000001	FSC00000007	FSR00012-1	Juicer accessories delivery	TOMYUM - Th...	MAIN	Not Started	2/10/2023	10:36 AM	11:06 AM	0 h
			ROUT	FCT00000005	000002	FSC00000006	FSR00010-1	Juicer Accessories Pickup	GOODEFOOD - ...	MAIN	Not Started	2/10/2023	11:36 AM	12:06 PM	0 h

Adding an Appointment to a Route Execution Document

Story

Suppose that today is Friday and your HM's Bakery & Cafe customer calls because they need a last-minute service (SUPP JUIACC) to be performed today. Acting as service manager Maia Davis, you will add an additional appointment to the route execution document.

Figure: Appointment added to route execution document

Route Document Details
FSR00011 - Friday route NY
NOTES
ACTIVITIES
FILES
CUSTOMIZATION
TOOLS

OPEN ROUTE ON MAP
OPEN DRIVER CALENDAR

Route Nbr.: FSR00011
Branch: SWEETEQUIP - Service
Route: FR-ROUTE - Friday rou
Trip Nbr.: 1
Schedule Start: 2/10/2023 9:00 AM
Status: Open
Driver: EP00000005 - Peter
Additional Driver:
Vehicle: FSE00011 - Brown H
Additional Vehi:
Additional Vehi:

ROUTE STATISTICS
Number of App... 3
Total Services: 3
Total Distance ... 45.85 mi
Total Services ... 1 h 30 m
Total Driving D... 3 h 19 m
Total Route Du... 4 h 49 m

ACTUAL TIME
Actual Start Date:
Actual End Date:
Actual Duration:

DRIVER SELECTOR
VEHICLE SELECTOR

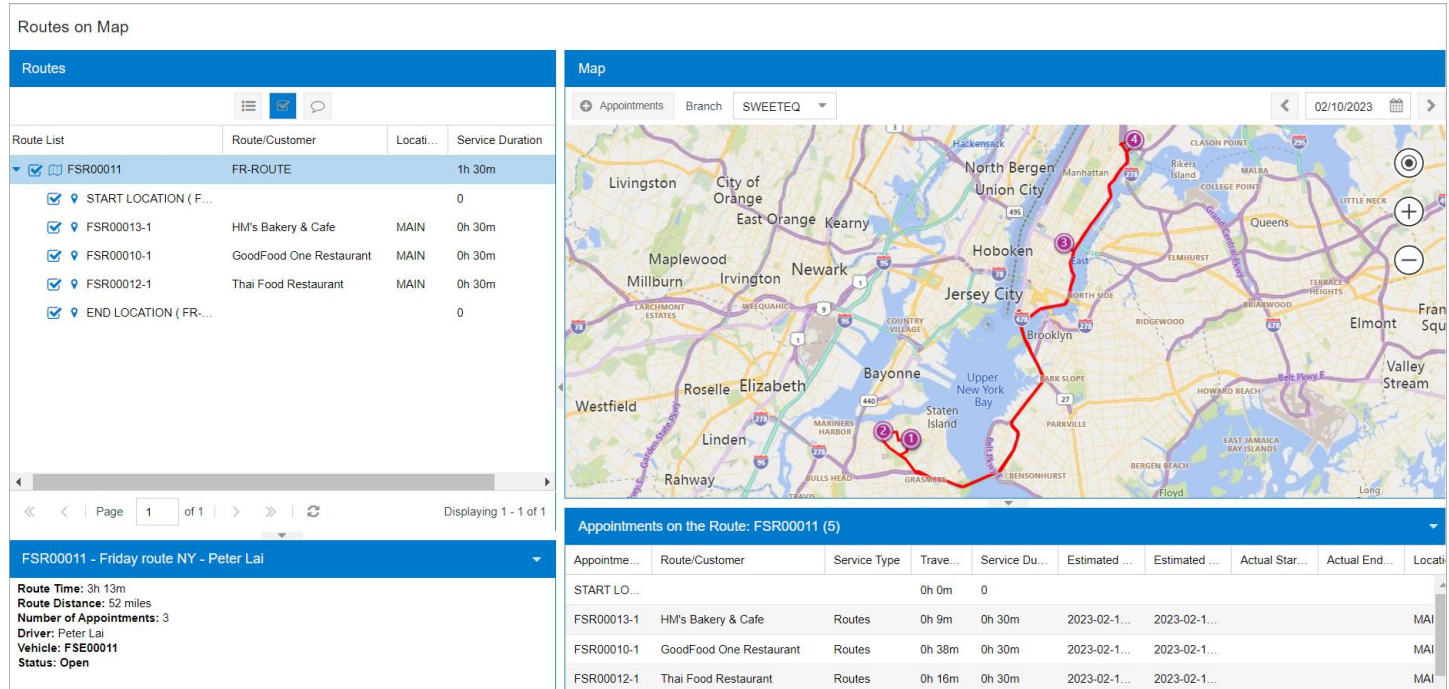
[*] Approximate values. Use for reference

APPOINTMENTS
ADDITIONAL INFO
ATTRIBUTES
LOCATION

REASSIGN

			Source Service Contract ID	Customer Contract Nbr.	Source Schedule ID	Appointment Nbr.	Description	Customer ID	Location ID	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time	Estir Dura
>		ROUT	ECT000000006	000001	FSC000000007	FSR00012-1	Juicer accessories delivery	TOMYUM - Th...	MAIN	Not Started	2/10/2023	10:36 AM	11:06 AM	0 h
		ROUT	ECT000000005	000002	FSC000000006	FSR00010-1	Juicer Accessories Pickup	GOODFOOD - ...	MAIN	Not Started	2/10/2023	11:36 AM	12:06 PM	0 h
		ROUT				FSR00013-1	Juicer accessories supply	HIMBAKERY - ...	MAIN	Not Started	2/10/2023	1:10 PM	1:40 PM	0 h

Figure: The generated routes on the map





Part 3: Route Management in the Mobile App

Lesson 9: Route Appointment Processing in the Mobile App

Learning Objectives

In this lesson, you will learn how to do the following:

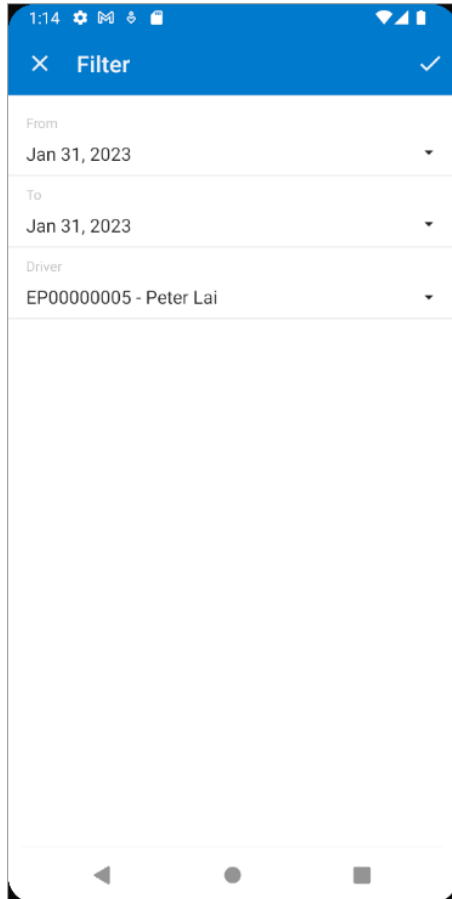
- Sign in to the Acumatica mobile app
- Learn how to navigate between the app screens
- Learn how to make selections on the screens
- Start a route appointment in the mobile app
- Complete a route in the mobile app
- Generate an invoice for the appointment

Processing a Route Execution in the Mobile App

Story

Suppose that you, acting as EP00000005 - Peter Lai (a driver of the SweetLife Service and Equipment Sales Center), need to visit appointments. You will find a route execution in the Acumatica mobile app, will start the route execution, will complete the appointments, and will complete the route execution.

Figure: Filtering the date range and a driver



A mobile application interface for filtering data. The screen has a blue header with a back arrow, a 'Filter' title, and a checkmark icon. Below the header, there are three filter sections: 'From' with a date picker set to 'Jan 31, 2023', 'To' with a date picker set to 'Jan 31, 2023', and 'Driver' with a dropdown menu set to 'EP00000005 - Peter Lai'. The bottom of the screen shows a white bar with three navigation icons: a back arrow, a circle, and a square.

1:14

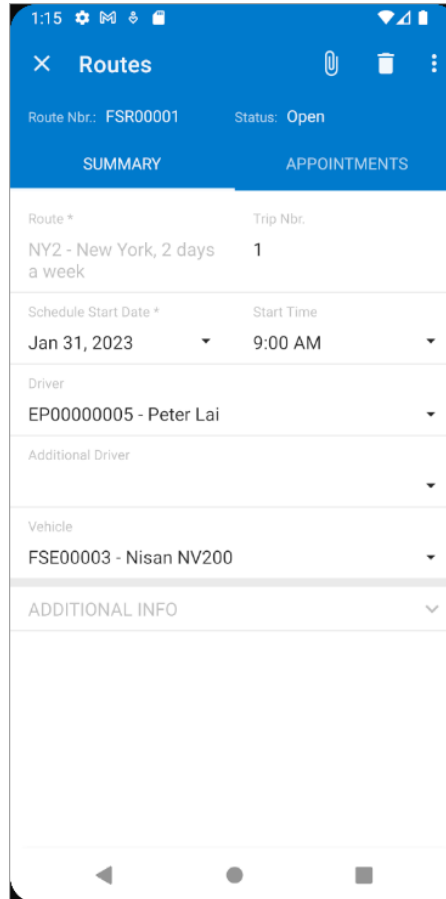
× Filter ✓

From
Jan 31, 2023

To
Jan 31, 2023

Driver
EP00000005 - Peter Lai

Figure: The route execution document



A mobile application interface for viewing route execution documents. The screen has a blue header with a back arrow, a 'Routes' title, and icons for a document, a trash can, and a menu. Below the header, there are two tabs: 'SUMMARY' and 'APPOINTMENTS'. The 'SUMMARY' tab is active. The main content area displays route details: 'Route *' as 'NY2 - New York, 2 days a week', 'Trip Nbr.' as '1', 'Schedule Start Date *' as 'Jan 31, 2023', and 'Start Time' as '9:00 AM'. Below this, there are sections for 'Driver' (EP00000005 - Peter Lai), 'Additional Driver', 'Vehicle' (FSE00003 - Nisan NV200), and 'ADDITIONAL INFO'. The bottom of the screen shows a white bar with three navigation icons: a back arrow, a circle, and a square.

1:15

× Routes

Route Nbr.: FSR00001 Status: Open

SUMMARY APPOINTMENTS

Route * Trip Nbr.
NY2 - New York, 2 days a week 1

Schedule Start Date * Start Time
Jan 31, 2023 9:00 AM

Driver
EP00000005 - Peter Lai

Additional Driver

Vehicle
FSE00003 - Nisan NV200

ADDITIONAL INFO

Figure: The Start menu command

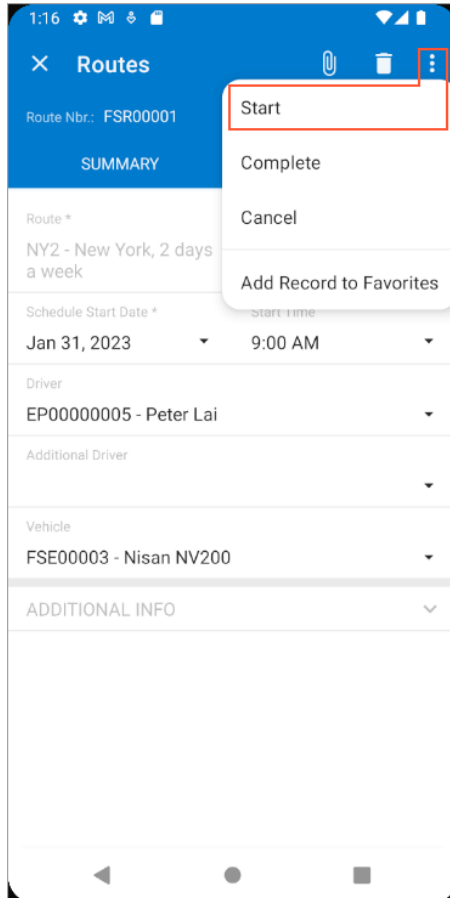


Figure: The route appointment on the Appointments tab

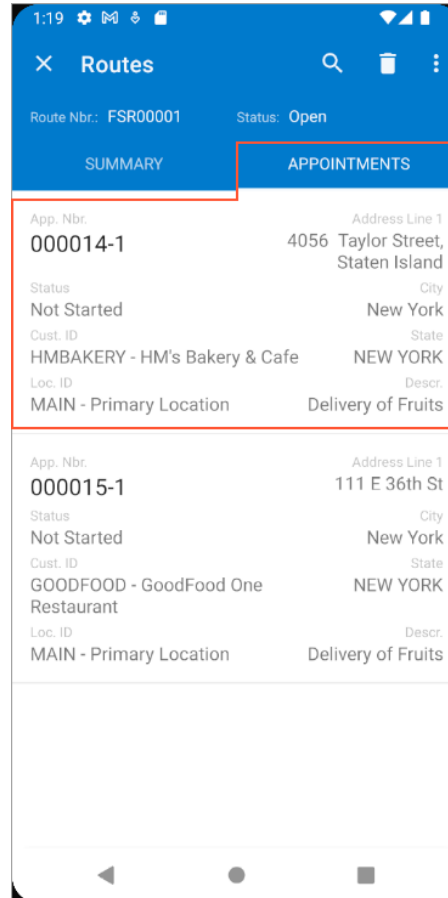


Figure: The Start menu command

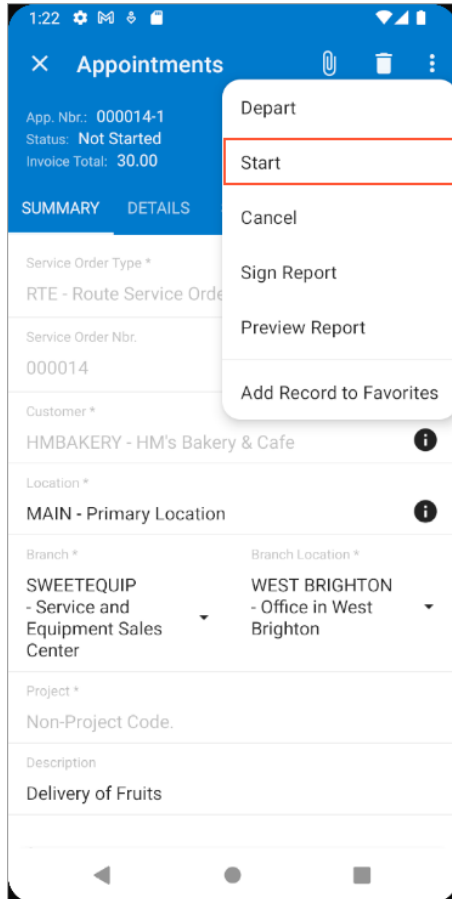


Figure: The generated report about the provided services



Figure: The Signature section on the Additional tab

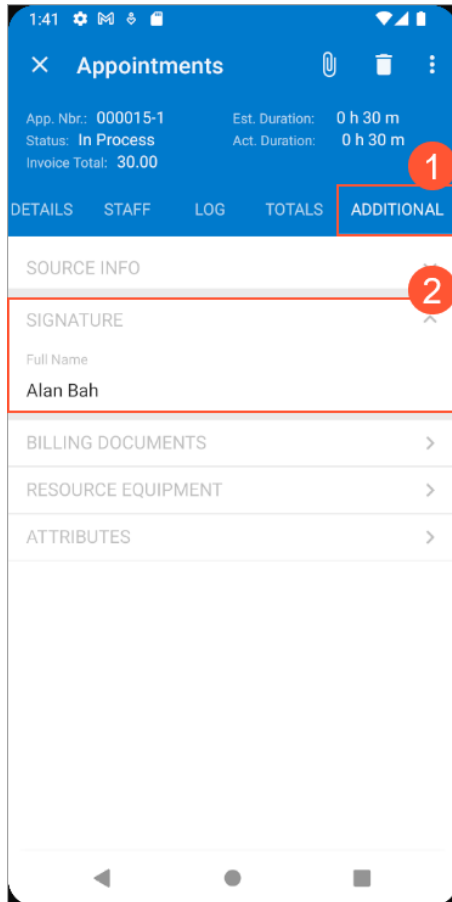


Figure: The signature in the report



Figure: Specifying the actual appointment times in the Date and Time section

The screenshot shows the 'Appointments' screen with the following details:

- App. Nbr.: 000014-1
- Status: In Process
- Invoice Total: 30.00
- Est. Duration: 0 h 30 m
- Act. Duration: 0 h 30 m

The 'DATE AND TIME' section is highlighted with a red border and contains the following fields:

Scheduled Start Date *		Scheduled Start Time *	
Jan 31, 2023		9:08 AM	
Scheduled End Date *	Scheduled End Time *	Handle Manually	
Jan 31, 2023	9:38 AM	<input type="checkbox"/>	
Actual Start Date *		Actual Start Time	
Jan 31, 2023		9:08 AM	
Actual End Date	Actual End Time	Handle Manually	
Jan 31, 2023	9:38 AM	<input checked="" type="checkbox"/>	

Below the 'DATE AND TIME' section are sections for ADDRESS, CONTACT, and SERVICE ORDER SETTINGS.

Figure: The Finished option button

The screenshot shows the 'Appointments' screen with the following details:

- App. Nbr.: 000014-1
- Status: In Process
- Invoice Total: 30.00
- Est. Duration: 0 h 30 m
- Act. Duration: 0 h 30 m

The 'Finished' toggle switch is highlighted with a red border. The toggle is currently turned on (blue).

Below the 'Finished' toggle are sections for Service Order Type, Service Order Nbr., Customer, Location, Branch, Branch Location, Project, and Description.

Closing the Route Execution and Generating Billing Documents

Story

Acting as the accountant of the SweetLife Service and Equipment Sales Center, you will use Acumatica ERP to close the route execution document and generate invoices for the appointments that were completed by a staff member in the Acumatica mobile app. Based on the settings of service order type of the appointments, the AR invoices will be generated.

Figure: Route appointments to be billed

Run Appointment Billing

TOOLS ▾

🔄 ↶ PROCESS PROCESS ALL ⏸ ⏹ ⏷

FILTERING OPTIONS

Generated Billing Docu... AR Documents and/or AP Bills 1

Billing Cycle:

Billing Customer:

Up to Date: 1/31/2023 2

☐ Ignore the Time Frame

BILLING OPTIONS

Billing Date: 1/31/2023

* Billing Period: 01-2023

				Service Order Type	Appointment Nbr.	Billing Customer ID	Billing Location	Billing Cycle ID	Cut-Off Date	Service Order Nbr.	Actual Start Date	Actual Start Time	Actual End Time	Branch Location ID	Status
>	📄	📄	<input type="checkbox"/>	RTE	000014-1	HMBAKERY - HM's...	MAIN	APAP	1/31/2023	000014	1/31/2023	9:08 AM	9:38 AM	WEST BRIGHTON	Closed
	📄	📄	<input type="checkbox"/>	RTE	000015-1	GOODFOOD - Goo...	MAIN	APAP	1/31/2023	000015	1/31/2023	10:51 AM	11:21 AM	WEST BRIGHTON	Closed

 **Acumatica**
The Cloud ERP

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