



# Equipment and Route Management

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Business Analyst

# Timing and Agenda

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**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

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**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

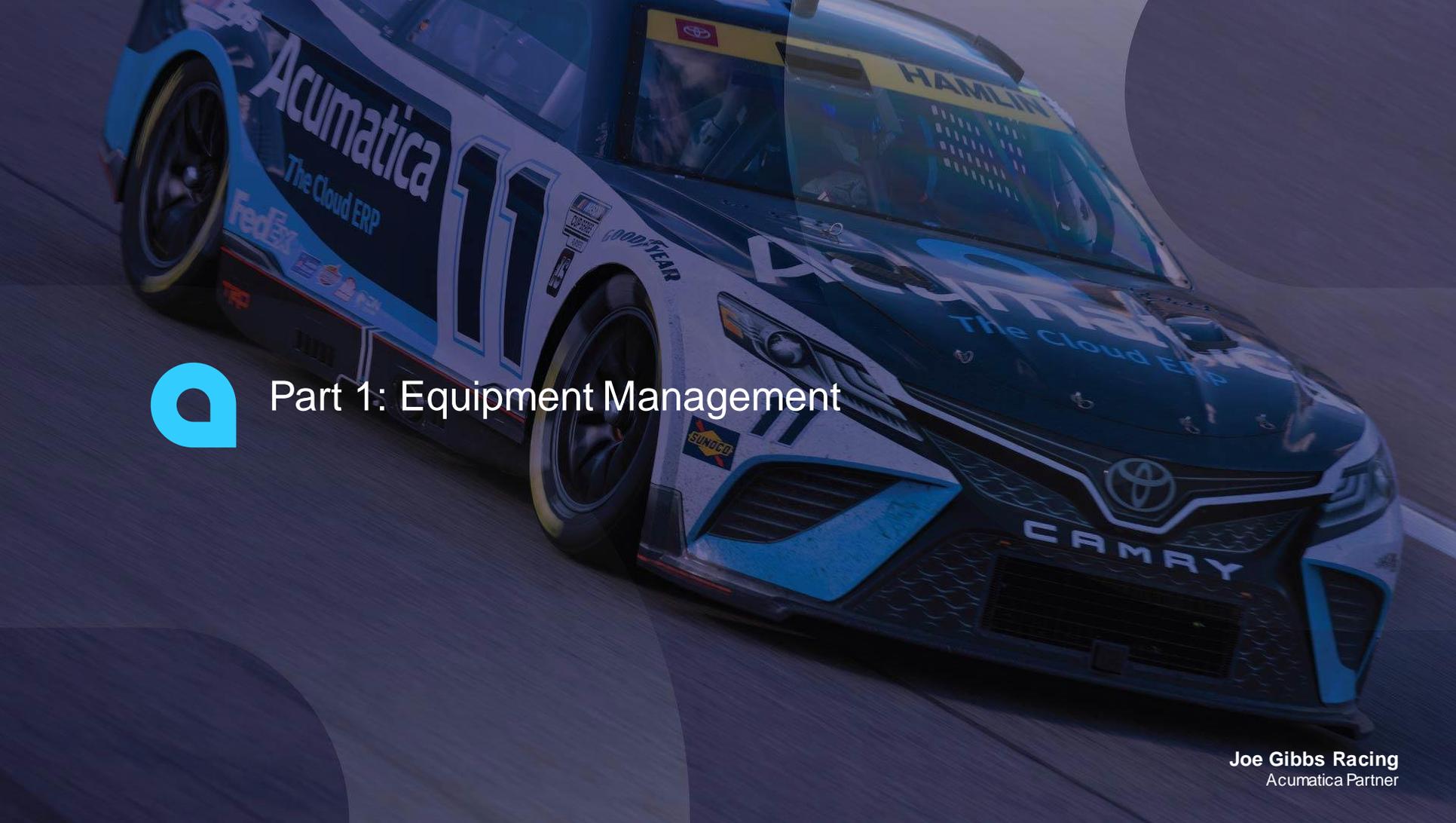


# Company Structure

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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

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## 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

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## 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

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## 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

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## 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: [input] 🔍

**GENERAL**

Override

**MAIN CONTACT**

Account Name: [input]

Attention: [input]

Email: [input] ✉️

Web: [input] 🌐

Business 1 ▾ [input]

Business 2 ▾ [input]

Fax ▾ [input]

**MAIN ADDRESS**

Address Line 1: [input]

Address Line 2: [input]

City: [input]

\* Country: US - United States of America 3

State: [input] 🔍

Postal Code: [input]

# Creating an Item Class for Equipment Without Components

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## 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

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## 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

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## 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

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## 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

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## 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

The screenshot displays the 'Item Classes' configuration page in Acumatica. The left sidebar shows a tree view of item classes, with 'COLDPRESS\* Commercial Cold Press' selected. The main area shows the configuration for this class, including the 'Service Management' tab and the 'Equipment Management' section. A table lists the components of the class, which are highlighted with a red border.

\* Class ID: COLDPRESS - Commercial Cold Press  
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

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## 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		

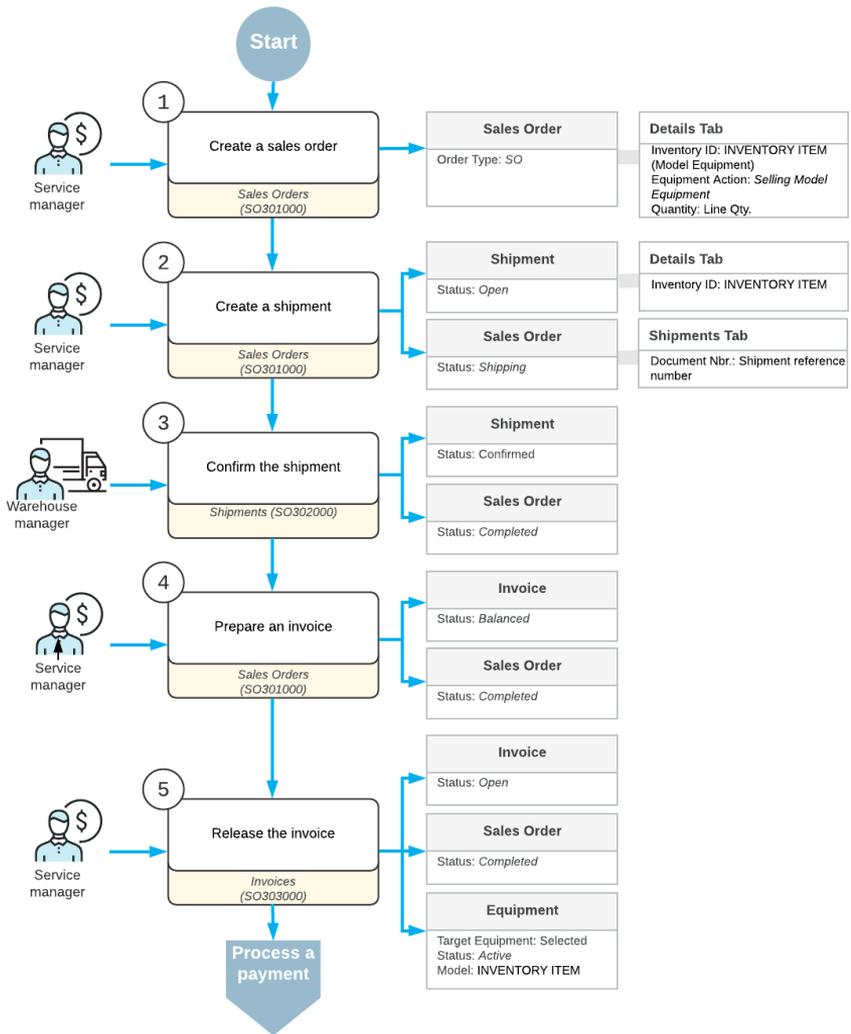
# Lesson 3: Management of Target Equipment

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## 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

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## 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

Receipts  
000086

The operation has completed.

Reference Nbr.: 000086    Transfer Nbr.:    Total Qty.: 160.00  
 Status: Released    External Ref.:    Total Cost: 36,700.00  
 Date: 1/30/2023    Description:     
 Post Period: 01-2023

DETAILS    FINANCIAL

LINE DETAILS    ADD ITEMS

	Inventory ID	Warehouse	Location	Quantity	UOM	Unit Cost	Ext. Cost	Reason Code	Cost Layer Type	Project	Project Task	Cost Code	Description
>	CPRESS30J	EQUIHOUSE	MAIN	20.00	ITEM	800.0000	16,000.00	INRECEIPT	Normal	X			Cold Press Juicer H30J
	JUICCY 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

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## 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

Type:	<input type="text" value="Invoice"/>	Customer:	GOODFOOD - GoodFood One Restaura	Detail Total:	1,500.00
Reference Nbr.:	<input type="text" value="000113"/>	Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Terms:	30D - 30 Days	Tax Total:	0.00
Date:	1/30/2023	* Due Date:	<input type="text" value="3/1/2023"/>	Write-Off Total:	0.00
Post Period:	01-2023	* Cash Discount...	<input type="text" value="3/1/2023"/>	Balance:	1,500.00
Customer Ord.:				Amount:	1,500.00
Project/Contract:	X - Non-Project Code			Cash Discount:	0.00
Description:					

	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	<a href="#">000068</a>	SO	<a href="#">000071</a>	<a href="#">JUICY J22C</a>		Selling Model Equipment	<a href="#">FSE00010</a>				
	INV	000113	2	<a href="#">000068</a>	SO	<a href="#">000071</a>	<a href="#">CPRESS30J</a>		Selling Model Equipment	<a href="#">FSE00011</a>				

The operation has completed.

# Figure: Details of the target equipment

Equipment  
FSE00010 - Juicy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: FSE00010

Equipment Type:   Vehicle  Target Equipment

Status: Active   Resource Equipment

Serial Nbr.:

Description: Juicy J22C Multifruit Centrifugal Juicer

**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  
 Status: Active  Resource Equipment  
 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** **VENDOR GENERAL WARRANTY**

Company Warran... 12 Months  
 Company Warran... 1/30/2024

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	<a href="#">JUICECUP</a>	Active	Juice Cup	CPRESSCOMP	CUPH300J		6	Months	7/30/2023	3	Months	4/30/2023	
00002	<a href="#">HOPPER</a>	Active	Hopper	CPRESSCOMP	HOPPERH3		3	Months	4/30/2023	0	Months		
00003	<a href="#">PLUNGER</a>	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
00004	<a href="#">AUGER</a>	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	<a href="#">SQUEEZO</a>
00005	<a href="#">DRUM</a>	Active	Drum	CPRESSCOMP	DRUMH30J		12	Months	1/30/2024	6	Months	7/30/2023	

# Creating an Appointment for Servicing Target Equipment

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## 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

START DEPART ...

\* Service Order ... INST - Insta  
Appointment N... 000044-1  
Service Order ... 000044  
Status: Not Started  
\* Scheduled Sta... 1/30/2023  
\* Actual Start D... 1/30/2023  
Description: Installation and training services

Customer: GOODFOOD - GoodFood One Restaura  
\* Location: MAIN - Primary Location  
\* Branch Location: WEST BRIGHTON - Office in West Bri  
Service Contract:  
Project: X - Non-Project Code.

Estimated Duration: 3 h 30 m  
Actual Duration: 0 h 00 m  
Actual Billable Total: 275.00  
Actual Tax Total: 0.00  
Invoice Total: 275.00  
 Waiting for Purchased Items

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

ADD ITEMS LOT/SERIAL NBR ADD STAFF ACTIONS CREATE EXPENSE RECEIPT CREATE AP BILL

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:  Service Order Type:  Item:   
Branch Location:  Service Order Nbr.:  Target Equipment:   
Customer:  Service Contract ID:  From Scheduled Date:   
Location:  Schedule ID:  To Scheduled Date:

Drag column header here to configure filter

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	<a href="#">000044</a>	000044-1	<a href="#">GOODFOOD</a>	<a href="#">MAIN</a>	1/30/2023	1/30/2023	6:43 PM		In Process	Service	<a href="#">INSTALL</a>	<a href="#">FSE00010</a>	
WEST BRIGHTON	INST	<a href="#">000044</a>	000044-1	<a href="#">GOODFOOD</a>	<a href="#">MAIN</a>	1/30/2023	1/30/2023	6:43 PM		In Process	Service	<a href="#">TRAINING</a>	<a href="#">FSE00010</a>	

# Creating Target Equipment Manually

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## 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  
Juiccy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: <NEW>  Vehicle  
Equipment Type:  Target Equipment **2**  
Status: Active  Resource Equipment  
Serial Nbr.:  
Description: Juiccy J22C Multifruit Centrifugal Juicer **1**

**Owner**  
 Company  
 Customer **3**  
\* Customer: HMBAKERY - HM's f **3**

**Location**  
 Company  
 Customer **4**  
\* Customer: HMBAKERY - HM's f **4**  
Location: MAIN - Primary Loca **4**

**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 ...

**INSTALLATION INFO**  
Installation Date: 1/30/2023 **5**  
Service Order ...  
Appointment N...

**INVENTORY INFO**  
Model Equipm... JUICCY J22C - Juiccy 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 🔍 📄 ...

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

# Selling a Piece of Equipment and an Optional Component

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## Story

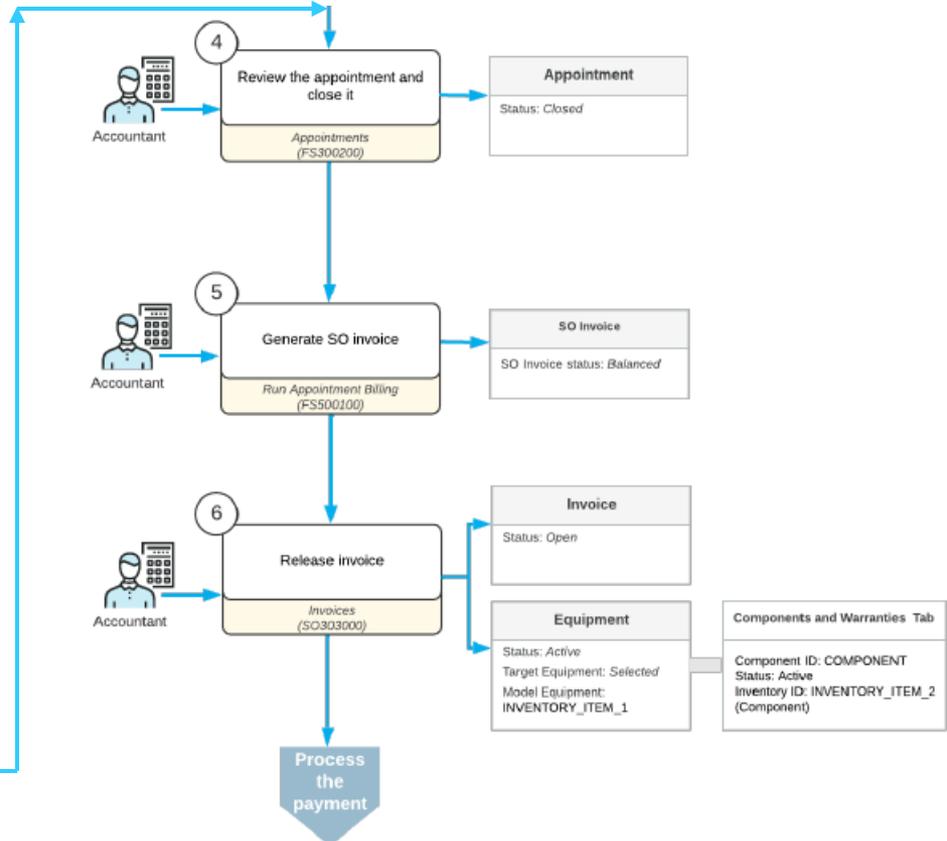
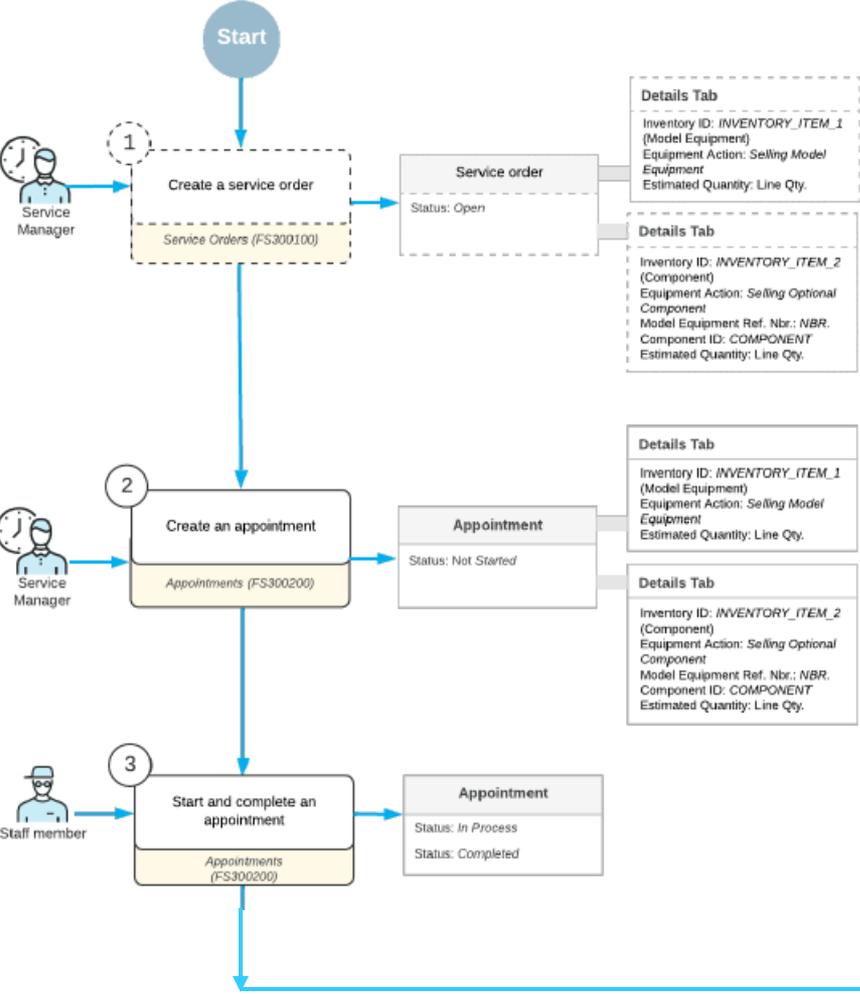
Suppose that the customer has contacted the SweetLife Service and Equipment Sales Center to request the following:

- 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: Released invoice showing the created target equipment

Invoices

Invoice 000114 - Thai Food Restaurant

The operation has completed.

Type: Invoice Customer: TOMYUM - Thai Food Restaurant Detail Total: 950.00

Reference Nbr.: 000114 Location: MAIN - Primary Location Discount Total: 0.00

Status: Open Terms: 30D - 30 Days Tax Total: 0.00

Date: 1/30/2023 \* Due Date: 3/1/2023 Write-Off Total: 0.00

Post Period: 01-2023 \* Cash Discount...: 3/1/2023 Balance: 950.00

Customer Ord... Amount: 950.00

Project/Contract: X - Non-Project Code. Cash Discount: 0.00

Description: Selling a juicer with optional component

DETAILS TAXES FREIGHT FINANCIAL ADDRESSES APPLICATIONS

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.	Related Svc. Doc. Nbr.	Transaction Descr.
INV	000114	1				<a href="#">INSTALL</a>		N/A					<a href="#">INST_000</a>	Installation of equipment at the customers'
INV	000114	2				<a href="#">CPRESS30J</a>		Selling Model Equipment	<a href="#">FSE00013</a>				<a href="#">INST_000</a>	Cold Press Juicer H30J
INV	000114	3				<a href="#">30HOPPERJK</a>		Selling Optional Component		2	HOPPER O		<a href="#">INST_000</a>	Hopper H30J metallic

# Figure: Equipment record with the additional component

Equipment  
FSE00013 - Cold Press Juicer H30J

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: FSE00013  Vehicle  
 Equipment Type:  Target Equipment  
 Status: Active  Resource Equipment  
 Serial Nbr.:  
 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  
 Vendor GENERAL WARRANTY: Vendor Warran... 6 Months  
 Company Warran... 1/30/2024 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	<a href="#">HOPPER</a>	Active	Hopper	CPRESSCOMP	HOPPERH3		3	Months	4/30/2023	0	Months		
00003	<a href="#">PLUNGER</a>	Active	Plunger	CPRESSCOMP	PLUNGERH30J		6	Months	7/30/2023	12	Months	1/30/2024	
00004	<a href="#">AUGER</a>	Active	Auger	CPRESSCOMP	AUGERH30J		12	Months	1/30/2024	12	Months	1/30/2024	<a href="#">SQUEEZO</a>
00005	<a href="#">DRUM</a>	Active	Drum	CPRESSCOMP	DRUMH30J		12	Months	1/30/2024	6	Months	7/30/2023	
00006	<a href="#">HOPPER O</a>	Active	Hopper optional	CPRESSCOMP	30HOPPERJK		3	Months	4/30/2023	0	Months		



Day 2

# Selling an Optional Component of Target Equipment

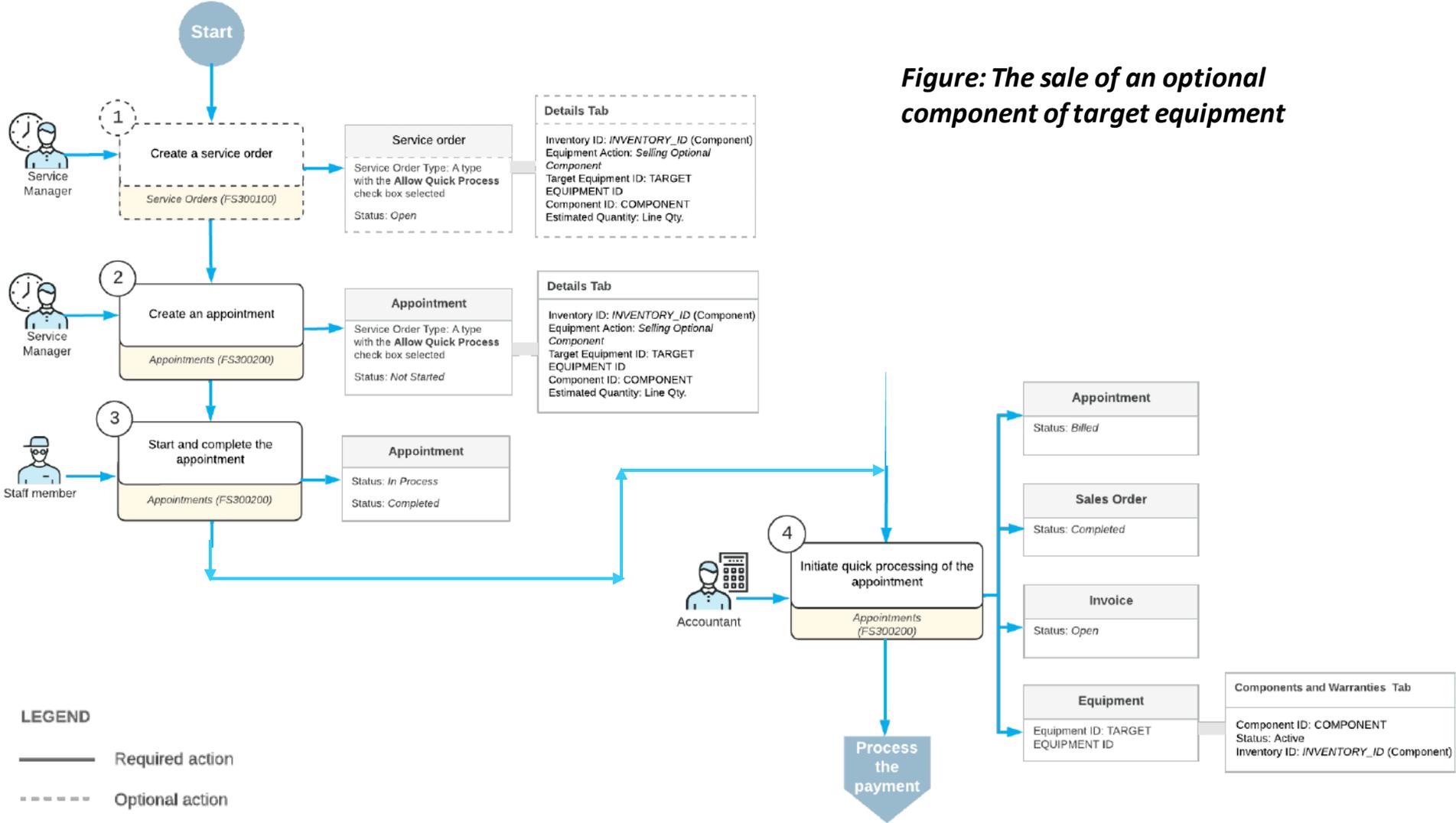
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## Story

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** \_\_\_\_\_ **VENDOR GENERAL WARRANTY** \_\_\_\_\_  
 Company Warr... 12 Months Vendor Warran... 6 Months  
 Company Warr... 1/30/2024 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	<a href="#">HOPPER</a>	Active	Hopper	<a href="#">CPRESSCOMP</a>	<a href="#">HOPPERH3</a>		3	Months	4/30/2023	0	Months		
00003	<a href="#">PLUNGER</a>	Active	Plunger	<a href="#">CPRESSCOMP</a>	<a href="#">PLUNGERH30J</a>		6	Months	7/30/2023	12	Months	1/30/2024	
00004	<a href="#">AUGER</a>	Active	Auger	<a href="#">CPRESSCOMP</a>	<a href="#">AUGERH30J</a>		12	Months	1/30/2024	12	Months	1/30/2024	<a href="#">SQUEEZO</a>
00005	<a href="#">DRUM</a>	Active	Drum	<a href="#">CPRESSCOMP</a>	<a href="#">DRUMH30J</a>	!	12	Months	1/30/2024	6	Months	7/30/2023	
00006	<a href="#">HOPPER O</a>	Active	Hopper optional	<a href="#">CPRESSCOMP</a>	<a href="#">30HOPPERJK</a>		3	Months	4/30/2023	0	Months		

# Upgrading a Default Component of Equipment to Be Sold

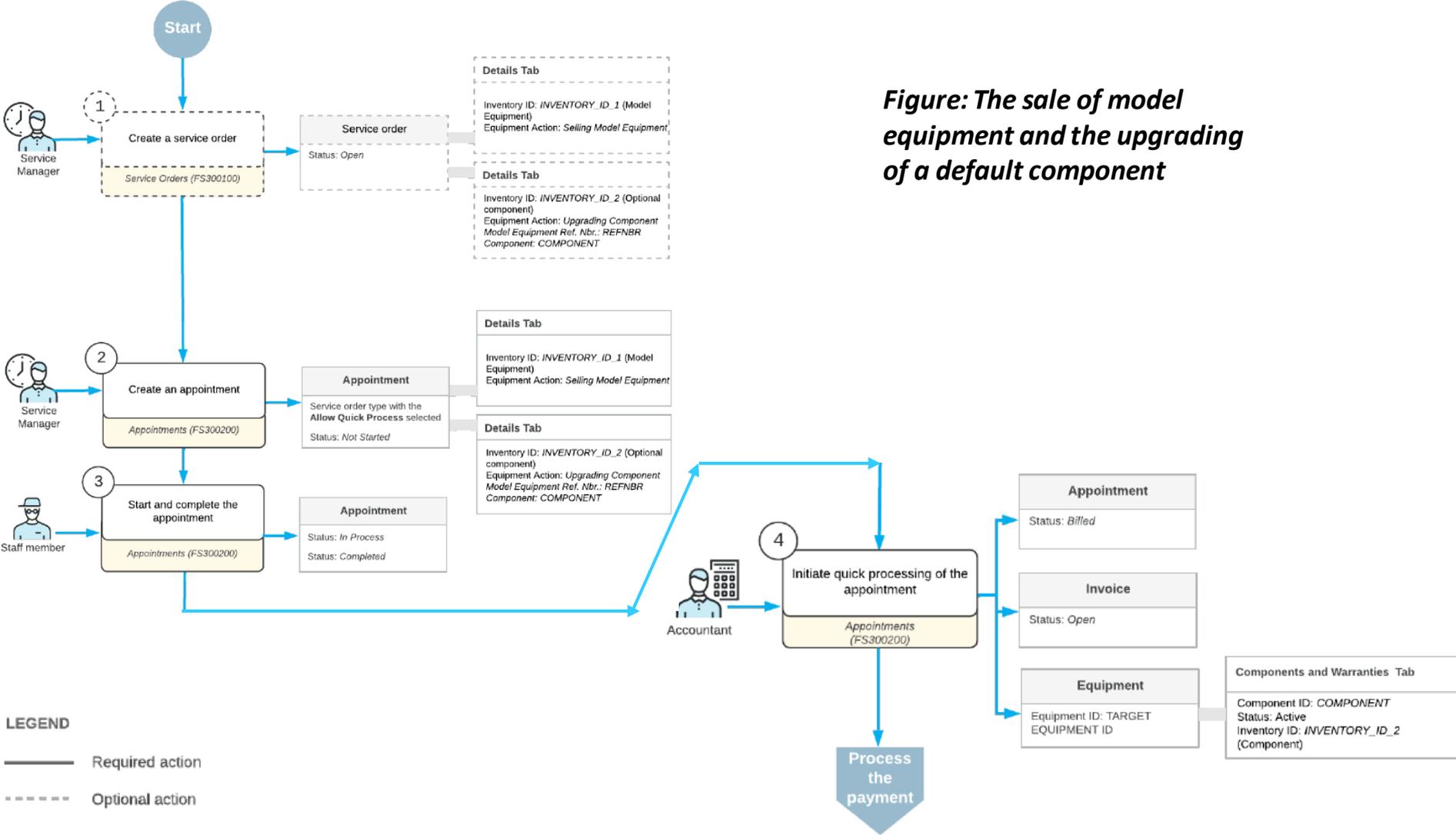
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## Story

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 sale of model equipment and the upgrading of a default component**

# 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  
 Vendor Warran... 7/30/2023

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	

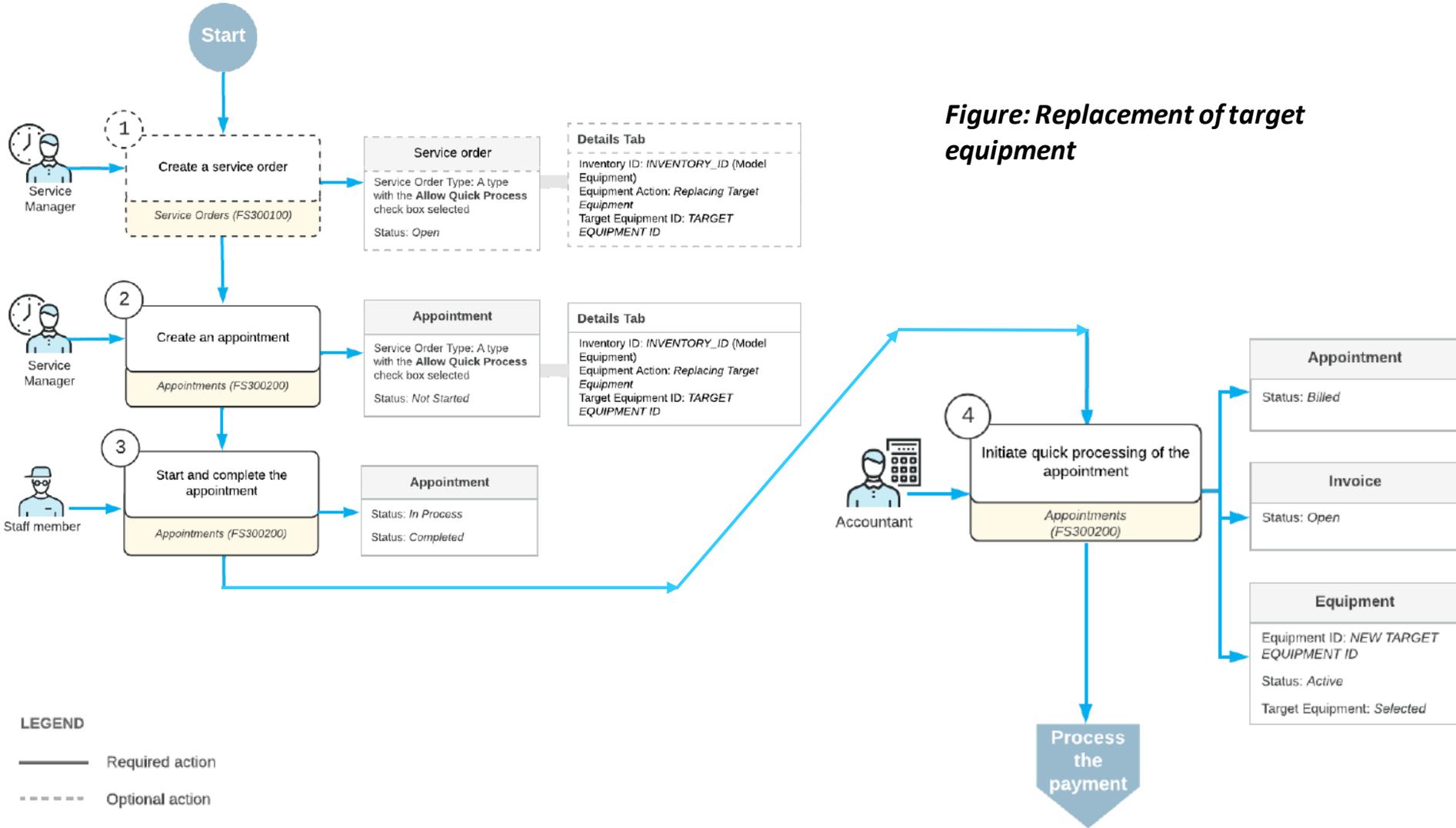
# Replacing Target Equipment

---

## 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: Replacement of target equipment**

# Figure: Disposed equipment

Equipment  
FSE00012 - Juicy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: FSE00012  Vehicle  
Equipment Type:  Target Equipment  
Status: **Disposed**  Resource Equipment  
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

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

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

**INVENTORY INFO**  
Model Equipm...: JUICY J22C - Juicy 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 - Juicy J22C Mult

# Figure: Settings related to the replaced equipment

Equipment

FSE00015 - Juicy J22C Multifruit Centrifugal Juicer

NOTES ACTIVITIES FILES TOOLS

Equipment Nbr.: FSE00015  Vehicle

Equipment Type:  Target Equipment

Status: Active  Resource Equipment

Serial Nbr.:

Description: Juicy J22C Multifruit Centrifugal Juicer

**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

Document Type: AR - Invoice

Document Ref... 000119

Sales Order N... 000118

Equipment Re... FSE00012

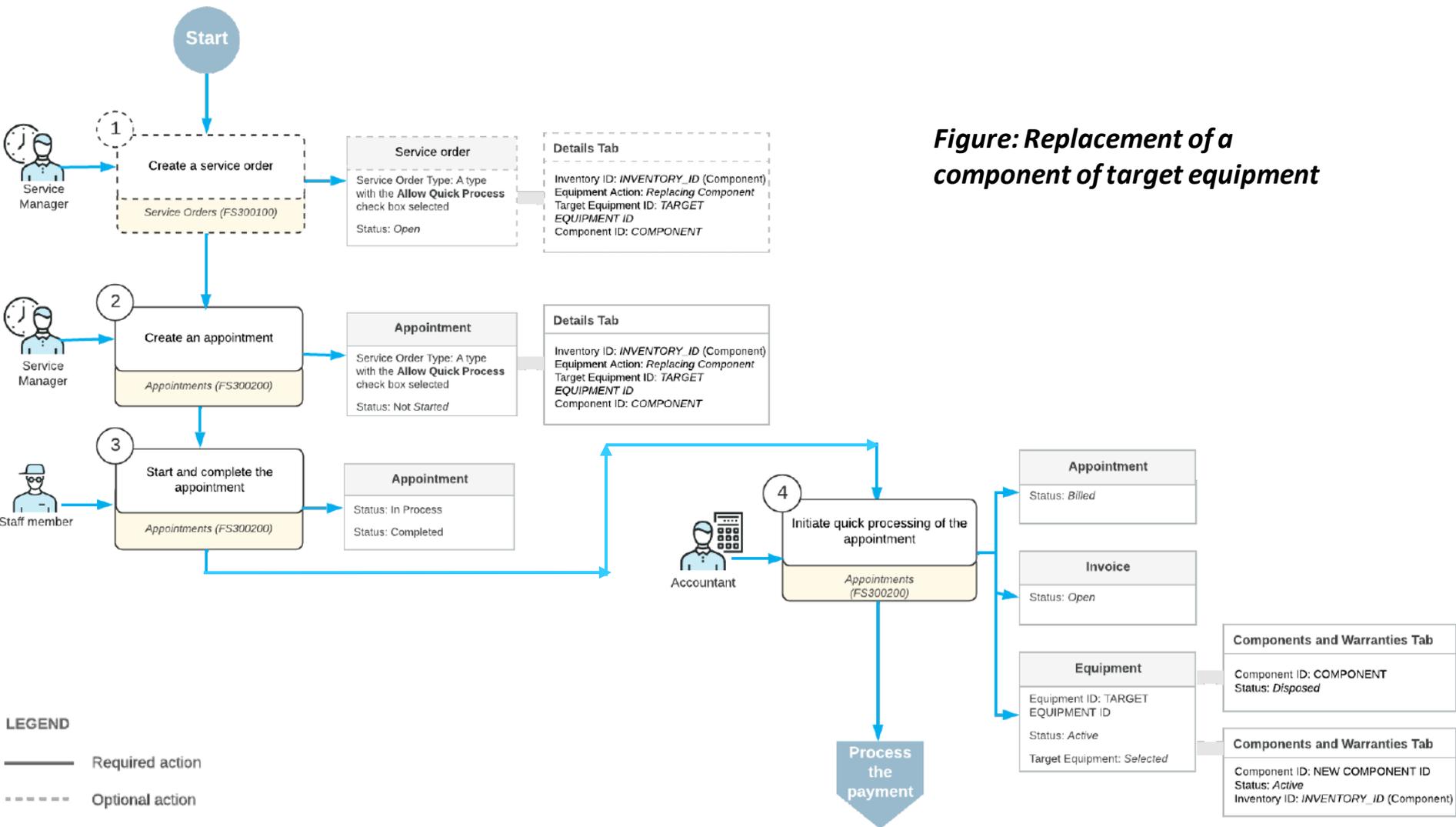
# Replacing a Component of Target Equipment

---

## 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

NOTES ACTIVITIES FILES TOOLS

Equipment Type:   Target Equipment  
 Status:   Resource Equipment  
 Serial Nbr.:   
 Description:

Owner:  Company  Customer  
 \* Customer:

Location:  Company  Customer  
 \* Customer:   
 Location:

GENERAL PURCHASE COMPONENTS AND WARRANTIES ATTRIBUTES SOURCE

COMPANY GENERAL WARRANTY: Company Warr... 12 Months  
 Vendor Warran... 6 Months  
 Company Warr... 1/30/2024 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	<a href="#">HOPPER</a>	Active	Hopper	<a href="#">CPRESSCOMP</a>	<a href="#">HOPPERH3</a>		3	Months	4/30/2023	0	Months		
00003	<a href="#">PLUNGER</a>	Active	Plunger	<a href="#">CPRESSCOMP</a>	<a href="#">PLUNGERH30J</a>		6	Months	7/30/2023	12	Months	1/30/2024	
00004	<a href="#">AUGER</a>	Active	Auger	<a href="#">CPRESSCOMP</a>	<a href="#">AUGERH30J</a>		12	Months	1/30/2024	12	Months	1/30/2024	<a href="#">SQUEEZO</a>
00005	<a href="#">DRUM</a>	Disposed	Drum	<a href="#">CPRESSCOMP</a>	<a href="#">DRUMH30J</a>	12345	12	Months	1/30/2024	6	Months	7/30/2023	
00006	<a href="#">DRUM</a>	Active	Drum H30J	<a href="#">CPRESSCOMP</a>	<a href="#">DRUMH30J</a>		12	Months	1/30/2024	6	Months	7/30/2023	

# Lesson 4: Management of Service Contracts

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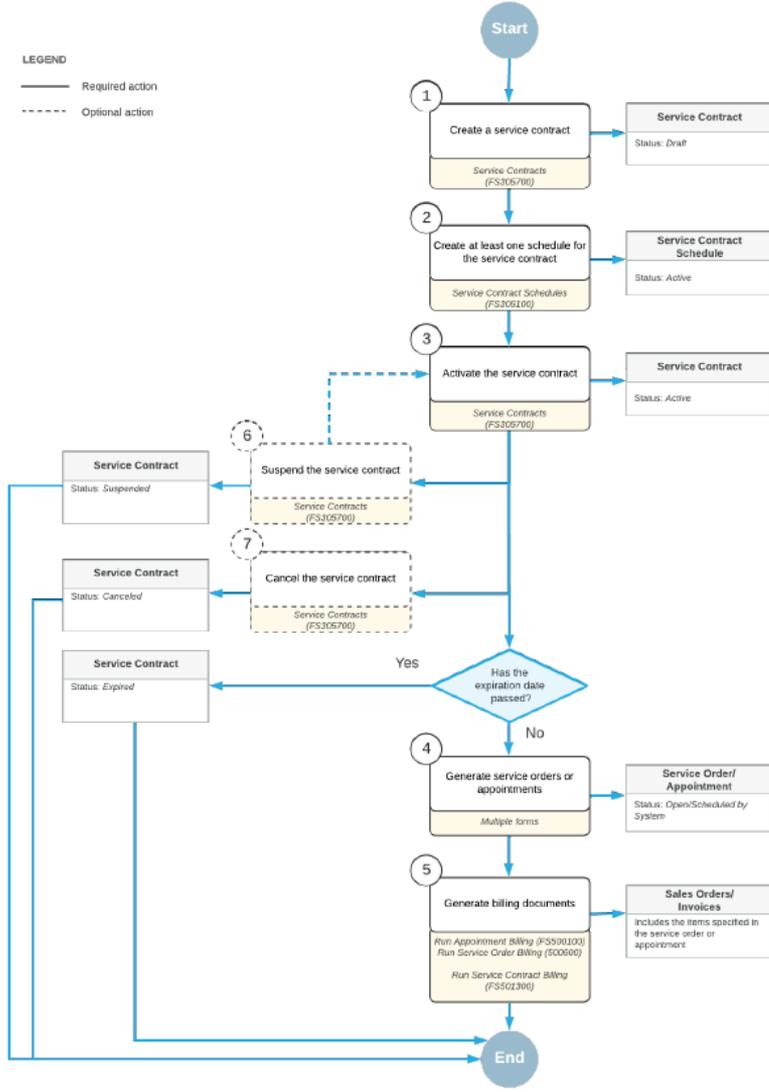
## Learning Objectives

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

LEGEND

- Required action
- - - - Optional action



**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 Eq  
 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	
>	🔍	D	SWEETEQUIP	WEST BRIGHTON	MRO	000050	000050-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	1/30/2023	10:00 AM		Not Started
	🔍	D	SWEETEQUIP	WEST BRIGHTON	MRO	000051	000051-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/3/2023	10:00 AM		Not Started
	🔍	D	SWEETEQUIP	WEST BRIGHTON	MRO	000052	000052-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/6/2023	10:00 AM		Not Started
	🔍	D	SWEETEQUIP	WEST BRIGHTON	MRO	000053	000053-1	Cleaning contract	GOODFOOD - GoodFood One Restau...	MAIN - Primary...	2/10/2023	10:00 AM		Not Started
	🔍	D	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

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  
FCT00000006 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

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 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 ▾

Branch:  Service Contract ID:  From Scheduled Date:  ▾

Branch Location:  Schedule ID:  To Scheduled Date:  ▾

Customer:  Staff Member:  Resource Equipment:

Location:  Service Order Nbr.:

[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
>	<input type="checkbox"/>	SWEETEQUIP	WEST BRIGHTON	MRO	<a href="#">000055</a>	<a href="#">000055-1</a>	Cleaning contract	<a href="#">HMLBAKERY - HM's Bakery &amp; Cafe</a>	MAIN - Primary...	1/30/2023	11:00 AM		Not Started
	<input type="checkbox"/>	SWEETEQUIP	WEST BRIGHTON	MRO	<a href="#">000056</a>	<a href="#">000056-1</a>	Cleaning contract	<a href="#">HMLBAKERY - HM's Bakery &amp; Cafe</a>	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 NBR'S 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  
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	1 h 00 m	1 h 00 m		

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

Appointments

MRO 000057-1 - HM's Bakery & Cafe

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.  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

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: 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: 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 Customer: HMBAKERY - HM's Bakery & Cafe Detail Total: 155.00

Reference Nbr.: 000123 \* Location: MAIN - Primary Location Discount Total: 0.00

Status: On Hold \* Terms: 30D - 30 Days Tax Total: 0.00

\* Date: 2/5/2023 \* Due Date: 3/7/2023  Apply Retainage Balance: 155.00

\* Post Period: 02-2023 \* Cash Discount: 3/7/2023  Pay by Line Cash Discount: 0.00

Customer Ord... \* Project/Contract: X - Non-Project Code.

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 Usage: Service on cleaning of juicers	1.00	HOUR	70.0000	70.00	0.000000	0.00	70.00	40000	Sales Revenue	
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	

# 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: HIMBAKERY - 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	Remaining Period Value	Used Period Value	Scheduled Period Value	Project Task	Cost Code
> Service	CLEANING	FSE00006	Time	1 h 00 m	0 h 00 m	0 h 00 m		

Select - Billing Period

Billing Period	Status	Invoiced
01/30/2023 - ...	Invoiced	<input checked="" type="checkbox"/>
> 02/06/2023 - ...	Active	<input type="checkbox"/>



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: The active billing period

Service Contracts  
FCT00000007 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

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Service Contract ID: FCT00000007 Status: Active  
Customer: GOODFOOD - GoodFood One Restaurar 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: Maintenance contract

SUMMARY SCHEDULES SERVICES PER PERIOD BILLING DOCUMENTS HISTORY ATTRIBUTES

Actions: Search by Billing Periods Billing Period: 01/30/2023 - 02/27/2023 Reference Nbr.: Contract Total: 150.00

Line Type	*Inventory ID	Target Equipment ID	Billing Rule	Value	Recurring Item Price	Total Recurring Price	Project Task	Cost Code	Deferral Code
> Non-Stock Item	DEPOSIT		Flat Rate	1.00	150.0000	150.00			

# 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  
Appointment N.: 000058-1  
Service Order: 000058  
Status: Not Started  
\* Scheduled Sta.: 1/30/2023  
\* Actual Start D.: 1/30/2023  
Description: Maintenance contract

Customer: GOODFOOD - GoodFood One Restaurant  
\* Location: MAIN - Primary Location  
\* Branch Location: WEST BRIGHTON - Office in West Bri  
Service Contract: FCT00000007 - Maintenance contract  
Contract Period: 01/30/2023 - 02/27/2023  
Project: X - Non-Project Code

Estimated Duration: 1 h 00 m  
Actual Duration: 0 h 00 m  
Actual Billable Total: 0.00  
Actual Tax Total: 0.00  
Invoice Total: 0.00

Waiting for Purchased Items

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
<SPLIT>		<input checked="" type="checkbox"/>	EQUIPHOUSE	MAIN	HOUR	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.

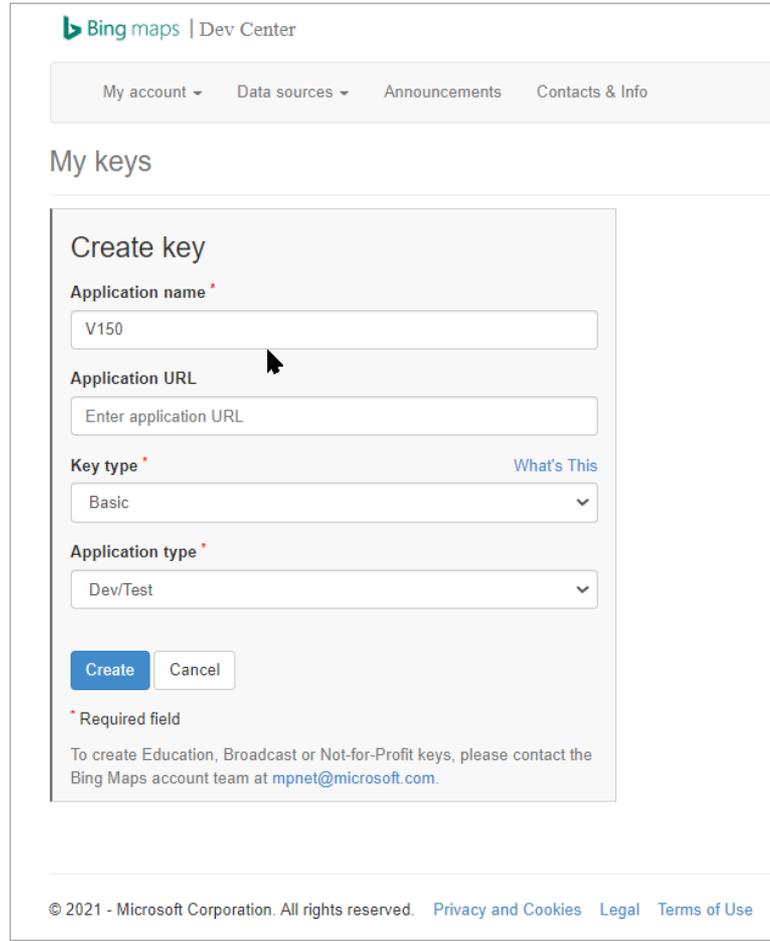
# Figure: Route Management feature

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



The screenshot shows the 'Create key' form in the Bing Maps Dev Center. The form is titled 'Create key' and contains the following fields and options:

- Application name \***: A text input field containing 'V150'.
- Application URL**: A text input field with the placeholder text 'Enter application URL'.
- Key type \***: A dropdown menu with 'Basic' selected. A link 'What's This' is visible to the right of the dropdown.
- Application type \***: A dropdown menu with 'Dev/Test' selected.

At the bottom of the form, there are two buttons: 'Create' (in blue) and 'Cancel' (in white). Below the buttons, there is a note: '\* Required field' and a link: 'To create Education, Broadcast or Not-for-Profit keys, please contact the Bing Maps account team at [mpnet@microsoft.com](mailto:mpnet@microsoft.com).'

The page header includes the Bing Maps logo and 'Dev Center'. A navigation bar contains 'My account', 'Data sources', 'Announcements', and 'Contacts & Info'. The page title is 'My keys'.

# Figure: Created key

The screenshot shows the Bing Maps Dev Center interface. At the top, there is a navigation bar with 'Bing maps | Dev Center' on the left and 'Hello' on the right. Below the navigation bar, there are several menu items: 'My account', 'Data sources', 'Announcements', and 'Contacts & Info'. The main heading is 'My keys'. Below the heading, there is a message: 'Key created successfully.' followed by two links: 'Click here to create a new key.' and 'Click here to download complete list of keys.' Below this, there is a search bar labeled 'View Specific Key:' with the placeholder text 'Enter key to search...' and a search icon. Below the search bar, there is a table with the following data:

Application name	Key details	Enable Preview for All Keys <input checked="" type="checkbox"/>
V150	<p>Key: <a href="#">Show key</a></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><a href="#">Update</a></p> <p><a href="#">Copy key</a></p> <p><a href="#">Usage Report</a></p> <p><a href="#">Enable Security</a></p> <p>Enable Preview <input type="checkbox"/></p>

# Figure: Bing Map API key inserted

Service Management Preferences NOTES FILES TOOLS ▾

GENERAL **CALENDARS & MAPS** MAILING & PRINTING

**CALENDAR SETTINGS**

\* Work Calendar:  

Appointment Resize Precision:

Appointment Auto-Confirm Time:

Number of Staff Members:

Show Service Orders in a Period Of:  Days

**MAP SETTINGS**

Bing Map API Key:

Refresh GPS Locations Every:  Seconds

History Time Accuracy:  Minutes

History Distance Accuracy:  Kilometers

Show Location Tracking

**DEFAULT CALENDAR SETTINGS**

View Mode:

Time Range:

Time Filter:

Day Start Time:

Day End Time:

Day Resolution:

Week Resolution:

Month Resolution:

# 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

The screenshot displays the Acumatica interface for an employee's profile. At the top, the employee's name is "Ricardo Martinez" with ID "EP00000044". The status is "Active". A navigation bar includes tabs for GENERAL, HISTORY, FINANCIAL, ATTRIBUTES, ACTIVITIES, MAILING & PRINTING, WORKGROUPS, ASSIGNMENT AND APPROVAL MAPS, DELEGATES, USER, CORPORATE CARDS, and SKILLS. The SKILLS tab is highlighted with a red box and a red circle containing the number "1". Below the tabs is a table of skills assigned to the employee:

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

The "DRIVING" skill row is highlighted with a red box and a red circle containing the number "2".

# 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: \_\_\_\_\_

**INSTALLATION INFO**

Installation Date: \_\_\_\_\_

Service Order ... \_\_\_\_\_

Appointment N... \_\_\_\_\_

**MANUFACTURER INFO**

Manufacturer: \_\_\_\_\_

Manufacturer ... \_\_\_\_\_

Manufacturing ... \_\_\_\_\_

**INVENTORY INFO**

Model Equipm... \_\_\_\_\_

Warehouse: \_\_\_\_\_

Warehouse Lo... \_\_\_\_\_

Model Serial 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 Expences in manufacturing
- MJUICE\*\*\*\* Fruit and vegetable juices
- MNUTS\*\*\*\*\* Nuts
- MPC\*\*\*\*\* Basic Maintenance and Operation S...

\* Class ID:  1  
Description:  2

GENERAL REPLENISHMENT RESTRICTION GROUPS ATTRIBUTES SERVICE MANAGEMENT

GENERAL SETTINGS

Stock Item 3  
 Allow Negative Quantity  
 Accrue Cost  
 Export to External System

Item Type:  4  
Valuation Method:   
Tax Category:  5  
Posting Class:  6  
Price Class:   
Default Warehouse:  7

Availability Calculation ...  
Country Of Origin:

INTERNATIONAL SHIPPING

Commodity Code Type:   
Commodity Code:

SHIPPING THRESHOLDS

Undership Threshold (%):   
Overship Threshold (%):

UNIT OF MEASURE 8

\* Base Unit:   Divisible Unit  
\* Sales Unit:   Divisible Unit  
\* Purchase Unit:   Divisible Unit

* From Unit	Multiply/Divide	Conversion Factor	To Unit
> MINUTE	Multiply	0.016667	HOUR

PRICE MANAGEMENT

Price Workgro...   
Price Manager:   
Min. Markup %:   
Markup %:

# 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 Product Workgroup: Product Manager: Description: Demonstration visit

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 \* Tax Category: EXEMPT - Exempt Tax Category Default Warehouse: EQUIPHOUSE - Warehouse for Equip

Require Receipt  
 Require Shipment  
Close PO Line: By Amount

FIELD SERVICE DEFAULTS  
Estimated Duration: 0 h 00 m  
 Route Service

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

# Figure: Route service

Services CUSTOMIZATION ▾ TOOLS ▾

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Drag column header here to configure filter

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

NOTES FILES CUSTOMIZATION TOOLS

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\* Route ID:  Week Code(s) ...

Origin Route:  Max. Appointm...:   No Limit

Route Short:

\* Description:

START LOCATION:  END LOCATION:

\* Branch:  \* Branch:

\* Branch Location:  \* Branch Location:

EXECUTION EMPLOYEES ATTRIBUTES WEEK CODES

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

# Lesson 6: Route Executions with Service Delivery

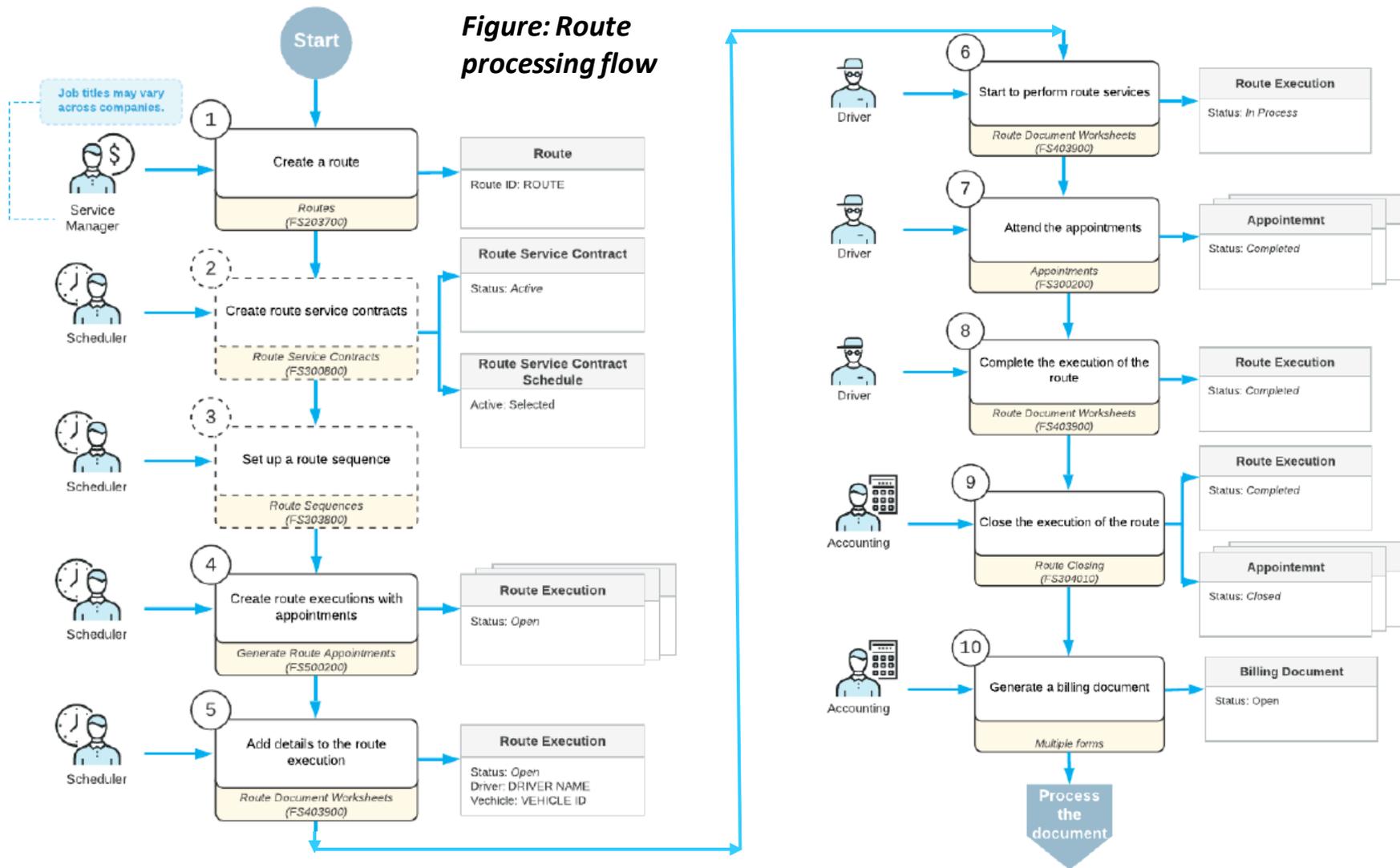
---

## 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

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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: EP0000005 - 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	* Schedule End Time
---	----	---	--------------------	----------------------------	------------------------	--------------------	------------------	-------------	-------------	-------------	--------	------------------------	------------------------	---------------------

# Figure: Staff Calendar Board

Staff Calendar Board

Service Orders Unassigned Appointments (8)

Search

Service Order	Account Name	Order Type
▶ 000041	FourStar Coffee ...	INST
▶ 000022	HM's Bakery & C...	MRO
▶ 000024	HM's Bakery & C...	MRO
▶ 000037	FourStar Coffee ...	MRO
▶ 000013	FourStar Coffee ...	TRN
▶ 000042	FourStar Coffee ...	TRN

Page 1 of 1

Dashboard

Appointments Branch SWEETEQ Branch Location WESTBRIC Staff Peter Lai Week Jan 29, 2023 - Feb 4, 2023

	Sun 29	Mon 30	Tue 31	Wed 01	Thu 02	Fri 03	Sat 04
7:00							
8:00							
9:00			000014-1				
10:00			000015-1		FSR00004-1 FSR00004 Not Started +1-212-555-0113		
11:00			000016-1				
12:00							
13:00							
14:00							
15:00							
16:00				000017-1			
17:00							
18:00							

Task Manager

# Figure: Appointment details

### Staff Routes on Map

Staff

☰
✉
💬
1

Route List	Route/Customer	Locati...	Service Duration
☑️ 📄 Peter Lai	R-ROUTE		1h 30m
☑️ 📍 START LOCATI...			0
☑️ 📍 FSR00004-1	HM's Bakery & Cafe	MAIN	1h 30m
☑️ 📍 END LOCATION...			0

Route for Peter Lai

**Route Time:** 1h 48m  
**Route Distance:** 4 miles  
**Number of Appointments:** 1

### Map

📍 Appointments
Branch
SWEETEQ
◻

◀
02/02/2023
📅
▶

Appointments for Peter Lai (3)

Appointme...	Route/Customer	Service Type	Trave ...	Service Du...	Estimated ...	Estimated ...	Actual Star...	Actual End...	Location
START LO...			0h 0m	0					
FSR00004-1	HM's Bakery & Cafe	Routes	0h 9m	1h 30m	2023-02-0...	2023-02-0...			MAIN
END LOC...			0h 9m	0					

# 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

NOTES ACTIVITIES FILES TOOLS

OPEN ROUTE ON MAP OPEN DRIVER CALENDAR

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

**ROUTE STATISTICS**

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

**ACTUAL TIME**

Actual Start Date:  
Actual End Date:  
Actual Duration:

[\*] 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	* Sched End T
>	ROUT				FSR00004-1	Demonstration of goods for prospective cu...	HMBAKERY - HM...	MAIN	Not Started	2/7/2023	9:08 AM	10:38

# Figure: Appointment added to the route execution document

Route Document Details NOTES ACTIVITIES FILES TOOLS ▾

FSR00003 - Regular route

← ↻ 📄 ↺ + 📄 ▾ ⏪ ⏩ ⏴ ⏵ 🗑️ OPEN ROUTE ON MAP OPEN DRIVER CALENDAR ...

Route Nbr.:

Branch: SWEETEQUIP - Service

Route: R-ROUTE - Regular rou ✎

Trip Nbr.:

\* Schedule Start...

Status: Open

Driver:  DRIVER SELECTOR

Additional Driver:

Vehicle:  VEHICLE SELECTOR

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

↻ + × ↑ ↓ 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	* Schec 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 List	Route/Customer	Locati...	Service Dura
<input checked="" type="checkbox"/> Peter Lai	R-ROUTE		3h 0m
<input checked="" type="checkbox"/> START LOCA...			0
<input checked="" type="checkbox"/> FSR00004-1	HM's Bakery & Cafe	MAIN	1h 30m
<input checked="" type="checkbox"/> FSR00005-1	Thai Food Restaurant	MAIN	1h 30m
<input checked="" type="checkbox"/> END LOCATI...			0

Page 1 of 1 | Displaying 1 - 1 of 1

### Map

Appointments Branch SWEETEIQ

### Route for Peter Lai

**Route Time:** 4h 30m  
**Route Distance:** 51 miles  
**Number of Appointments:** 2

### Appointments for Peter Lai (4)

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

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

The screenshot shows a 'Driver Selector' dialog box overlaid on a software interface. The dialog box contains the following information:

- 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
- Table of available drivers:

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

At the bottom of the dialog box, there are navigation arrows and two buttons: 'SELECT DRIVER' and 'CLOSE'.



# Figure: Modified route execution

Staff Routes on Map

### Staff

Route List	Route/Customer	Locati...	Service Duration
<input checked="" type="checkbox"/> Peter Lai	R-ROUTE		4h 30m
<input checked="" type="checkbox"/> START LOCATION ( R-R...			0
<input checked="" type="checkbox"/> FSR00004-1	HM's Bakery & Cafe	MAIN	1h 30m
<input checked="" type="checkbox"/> FSR00007-1	GoodFood One Restaurant	MAIN	1h 30m
<input checked="" type="checkbox"/> FSR00005-1	Thai Food Restaurant	MAIN	1h 30m
<input checked="" type="checkbox"/> END LOCATION ( R-RO...			0
<input checked="" type="checkbox"/> Luke Cole	TU-ROUTE		0

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### Route for Peter Lai

**Route Time:** 6h 13m  
**Route Distance:** 52 miles  
**Number of Appointments:** 3

### Map

Appointments Branch SWEETEQ | 02/07/2023

The map displays a red route starting in Jersey City, NJ, and passing through Newark, NJ. Numbered stops are marked: 1 (Jersey City), 2 (Newark), 3 (Newark), and 4 (Jersey City). The route is shown on a street map with major highways and landmarks.

### Appointments for Peter Lai (5)

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

# Processing the Route Execution

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## 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

The screenshot displays the 'Route Document Details' for 'FSR00003 - Regular route'. The interface includes a top navigation bar with 'NOTES', 'ACTIVITIES', 'FILES', and 'TOOLS'. Below this is a toolbar with icons for file operations and buttons for 'OPEN ROUTE ON MAP' and 'OPEN DRIVER CALENDAR'. The main content area is divided into several sections:

- Form Fields:** 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), and Vehicle (FSE00010 - White Fr).
- 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), and Total Route Du... (7 h 58 m).
- Buttons:** DRIVER SELECTOR and VEHICLE SELECTOR.
- APPOINTMENTS:** A table listing appointments with columns for Service Order Type, Source Service Contract ID, Customer Contract Nbr., Source Schedule ID, Appointment Nbr., Description, Customer ID, Location ID, Status, Scheduled Start Date, and Sc St.

A dropdown menu is open over the 'Start' button, showing the following options:

- Processing
- ☆ Start (highlighted with a red box)
- Complete
- Cancel
- Corrections
- Reopen
- Unclose
- Delete
- Other
- Open Route On Map
- Open Driver Calendar
- Calculate Route Statistics

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...	HMBAKERY - 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 E...	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: EP0000005 - 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

**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	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: EP0000005 - 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 - HM...	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

# Figure: Closing of the route

Routes Closing TOOLS ▾

Route Nbr.:  Route: R-ROUTE - Regular rou  ACTUAL TIME

\* Branch: SWEETEQUIP - Sen Status: Completed
   
 \* Schedule Start Date: 2/7/2023 Trip Nbr.: 1
   
 Start Time: 9:00 AM Driver: EP00000005 - Peter
   
 Vehicle: FSE00010 - White Fi

\* Actual Start Time: 9:08 AM 1
  
 \* Actual End Time: 3:13 PM 3

APPOINTMENTS ADDITIONAL INFO

		* Service Order Type	Service Contract ID	Customer Contract Nbr.	Schedule ID	Appointment Nbr.	Description	Customer	Customer Location	Status	* Scheduled Start Date	* Scheduled Start Time	* Scheduled End Time	Estimated Duration			
>	<input type="checkbox"/>	ROUT				<a href="#">FSR00004-1</a>	Demonstration of goods for prospective cu...	<a href="#">HIMBAKERY - HM's Bak...</a>	<a href="#">MAIN</a>	Completed	2/7/2023	9:08 AM <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span>	10:38 AM	1 h 30 m			
	<input type="checkbox"/>	ROUT				<a href="#">FSR00007-1</a>	Juicer Demonstration	<a href="#">GOODFOOD - GoodFoo...</a>	<a href="#">MAIN</a>	Completed	2/7/2023	11:51 AM	1:21 PM	1 h 30 m			
	<input type="checkbox"/>	ROUT				<a href="#">FSR00005-1</a>	Juicer Demonstration	<a href="#">TOMYUM - Thai Food R...</a>	<a href="#">MAIN</a>	Completed	2/7/2023	1:43 PM	3:13 PM <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">4</span>	1 h 30 m			

# Generating Invoices for Route Appointments

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## 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...:

Billing Cycle:

Billing Customer:

Up to Date:

Ignore the Time Frame

**BILLING OPTIONS**

Billing Date:

\* Billing Period:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	INST	000006-1	TOMYUM - Thai Food Resta...	MAIN	AP SO	1/24/2023	000006	1/24/2023	9:00 AM	10:00 AM	WEST BRIGHTON	Closed	Installation of equipment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INST	000006-2	TOMYUM - Thai Food Resta...	MAIN	AP SO	1/28/2023	000006	1/28/2023	10:00 AM	10:45 AM	WEST BRIGHTON	Closed	Installation of equipment
<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input type="checkbox"/>	MRO	000008-1	TOMYUM - Thai Food Resta...	MAIN	AP SO	1/28/2023	000008	1/28/2023	2:00 PM	3:00 PM	WEST BRIGHTON	Closed	Service on cleaning of ju
<input type="checkbox"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<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"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ROUT	FSR00005-1	TOMYUM - Thai Food Resta...	MAIN	AP SO	2/7/2023	FSR00005	2/7/2023	1:43 PM	3:13 PM	WEST BRIGHTON	Closed	Juicer Demonstration
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<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

# Lesson 7: Route Executions with Item Delivery

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## 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

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## 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 ▾

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Drag column header here to configure filter

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

# Figure: Availability of stock item

Inventory Summary CUSTOMIZATION TOOLS ▾

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\* 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 for 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	0.00
<b>Total:</b>		<b>10.00</b>	<b>10.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>10.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

# Processing Pickup and Delivery Route Services

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## 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

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## 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

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## 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 Duration: 0 h 30 m  Override

Schedule ID: <NEW>  Active \* Start Date: 2/6/2023

Customer: GOODFOOD - GoodFood One F Expiration Date: 2/5/2024

Location: MAIN - Primary Location

Customer Contract Nbr.: 000002 Next Execution Date:

Project: X - Non-Project Code. Last Generated:

\* Service Order Type: ROUT - Routes

Schedule Generation T...: Appointments

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

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## 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

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Order	Customer	Location	Location Name	Address	City	State	Service Contract ID	Customer Contract Nbr.	Description	Service Contract Status
00005	<a href="#">TOMYUM - Thai Food Restaurant</a>	MAIN	Primary Location	341 E 138th St	New York	NY	<a href="#">FCT00000006</a>	000001	Juicer accessories delivery	Active
00010	<a href="#">GOODFOOD - GoodFood One Restaurant</a>	MAIN	Primary Location	111 E 36th St	New York	NY	<a href="#">FCT00000005</a>	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

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

# Generating Route Appointments

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## 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** **GENERATION OPTIONS**

Route:  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
<a href="#">GOODFOOD - GoodFoo...</a>	<a href="#">FCT00000005</a>	000002	Juicer Accessories Pickup	<a href="#">MAIN</a>	Primary Location	Occurs every 1 week(s) on Friday.	<a href="#">FSC00000006</a>	2/6/2023	2/5/2024	
<a href="#">TOMYJUM - Thai Food R...</a>	<a href="#">FCT00000006</a>	000001	Juicer accessories delivery	<a href="#">MAIN</a>	Primary Location	Occurs every 1 week(s) on Friday.	<a href="#">FSC00000007</a>	2/6/2023	2/5/2024	

# Assigning a Driver and a Vehicle to a Route Execution

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## 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 ▾

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From:    
To:    
Driver:

2 3

2 ASSIGN DRIVER 3 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	<a href="#">EP00000005 - Peter Lai</a>		<a href="#">FSE00003</a>			3	3	2 h 34 m	1 h 30 m	4 h 04 m
	🗑️	FSR00002	NY		1	Open	2/1/2023	3:00 PM	<a href="#">EP00000005 - Peter Lai</a>		<a href="#">FSE00004</a>			1	1	1 h 10 m	0 h 30 m	1 h 40 m
<span style="border: 1px solid red; border-radius: 50%; padding: 2px 5px;">1</span>	🗑️	FSR00006	TU-ROUTE		1	Open	2/7/2023	3:00 PM	<a href="#">EP00000045 - Luke Cole</a>		<a href="#">FSE00011</a>			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 NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

FSR00011 - Friday route NY

OPEN ROUTE ON MAP OPEN DRIVER CALENDAR ...

Route Nbr.:

Branch: SWEETEQUIP - Service

Route:

Trip Nbr.:

Schedule Start: 2/10/2023 9:00 AM

Status: Open

Driver:  DRIVER SELECTOR

Additional Driver:

Vehicle:  VEHICLE SELECTOR

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

[\*] 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	Estim Dura
>	ROUT	<a href="#">FCT00000006</a>	000001	<a href="#">FSC00000007</a>	<a href="#">FSR00012-1</a>	Juicer accessories delivery	<a href="#">TOMYUM - Th...</a>	<a href="#">MAIN</a>	Not Started	2/10/2023	10:36 AM	11:06 AM	0 h
	ROUT	<a href="#">FCT00000005</a>	000002	<a href="#">FSC00000006</a>	<a href="#">FSR00010-1</a>	Juicer Accessories Pickup	<a href="#">GOODFOOD - ...</a>	<a href="#">MAIN</a>	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 DRIVER SELECTOR  
Additional Driver:  
Vehicle: FSE00011 - Brown VEHICLE SELECTOR  
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:

[\*] 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	ECT00000006	000001	FSC00000007	FSR00012-1	Juicer accessories delivery	TOMYUM - Th...	MAIN	Not Started	2/10/2023	10:36 AM	11:06 AM	0 h
	ROUT	ECT00000005	000002	FSC00000006	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	HMBAKERY - ...	MAIN	Not Started	2/10/2023	1:10 PM	1:40 PM	0 h

# Figure: The generated routes on the map

Routes on Map

Routes

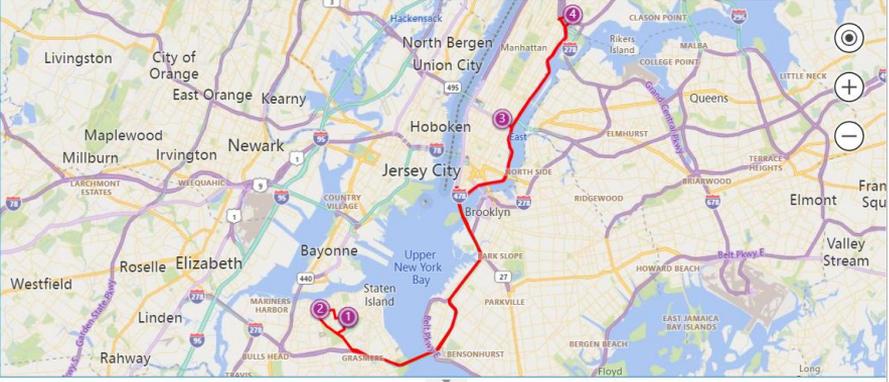
☰
🔗
💬

Route List	Route/Customer	Locati...	Service Duration
☑️ <input checked="" type="checkbox"/> FSR00011	FR-ROUTE		1h 30m
☑️ <input checked="" type="checkbox"/> START LOCATION ( F...			0
☑️ <input checked="" type="checkbox"/> FSR00013-1	HM's Bakery & Cafe	MAIN	0h 30m
☑️ <input checked="" type="checkbox"/> FSR00010-1	GoodFood One Restaurant	MAIN	0h 30m
☑️ <input checked="" type="checkbox"/> FSR00012-1	Thai Food Restaurant	MAIN	0h 30m
☑️ <input checked="" type="checkbox"/> END LOCATION ( FR...			0

Map

📍 Appointments
Branch
SWEETEQ ▾

◀ 02/10/2023 📅 ▶



Appointments on the Route: FSR00011 (5)

Appointme...	Route/Customer	Service Type	Trave...	Service Du...	Estimated ...	Estimated ...	Actual Star...	Actual End...	Locati...
START LO...			0h 0m	0					
FSR00013-1	HM's Bakery & Cafe	Routes	0h 9m	0h 30m	2023-02-1...	2023-02-1...			MAI
FSR00010-1	GoodFood One Restaurant	Routes	0h 38m	0h 30m	2023-02-1...	2023-02-1...			MAI
FSR00012-1	Thai Food Restaurant	Routes	0h 16m	0h 30m	2023-02-1...	2023-02-1...			MAI

FSR00011 - Friday route NY - Peter Lai

**Route Time:** 3h 13m  
**Route Distance:** 52 miles  
**Number of Appointments:** 3  
**Driver:** Peter Lai  
**Vehicle:** FSE00011  
**Status:** Open



# Part 3: Route Management in the Mobile App

# Lesson 9: Route Appointment Processing in the Mobile App

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## 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

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## 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

1:14

Filter

From  
Jan 31, 2023

To  
Jan 31, 2023

Driver  
EP00000005 - Peter Lai

## Figure: The route execution document

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

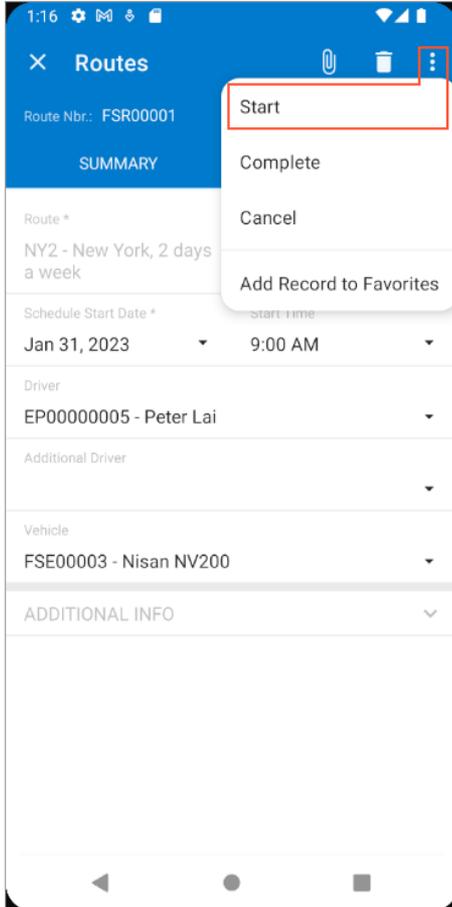
Driver  
EP00000005 - Peter Lai

Additional Driver

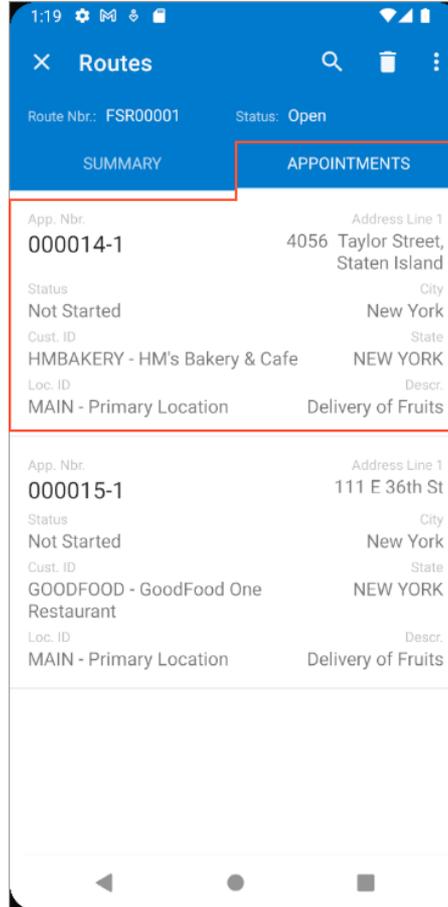
Vehicle  
FSE00003 - Nisan NV200

ADDITIONAL INFO

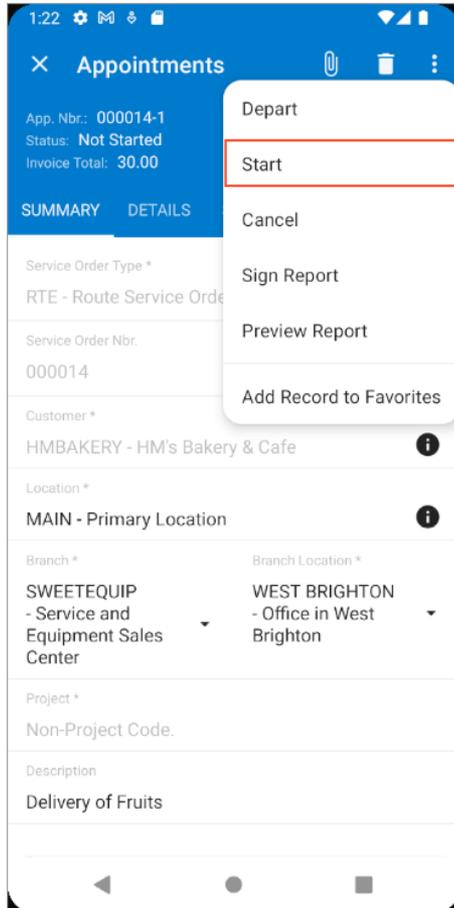
## Figure: The Start menu command



## Figure: The route appointment on the Appointments tab



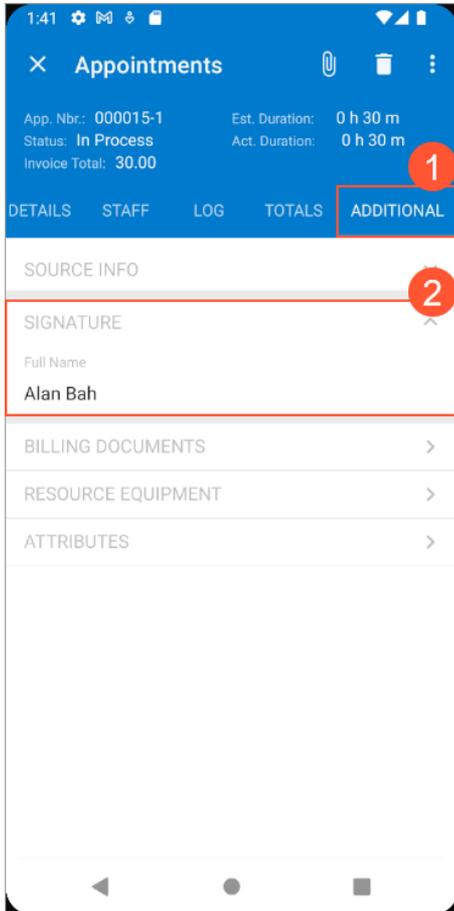
## Figure: The Start menu command



## Figure: The generated report about the provided services



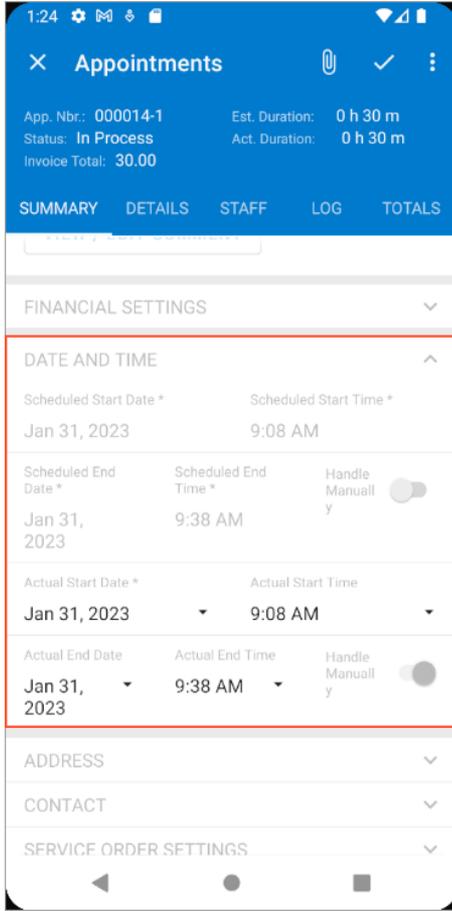
**Figure: The Signature section on the Additional tab**



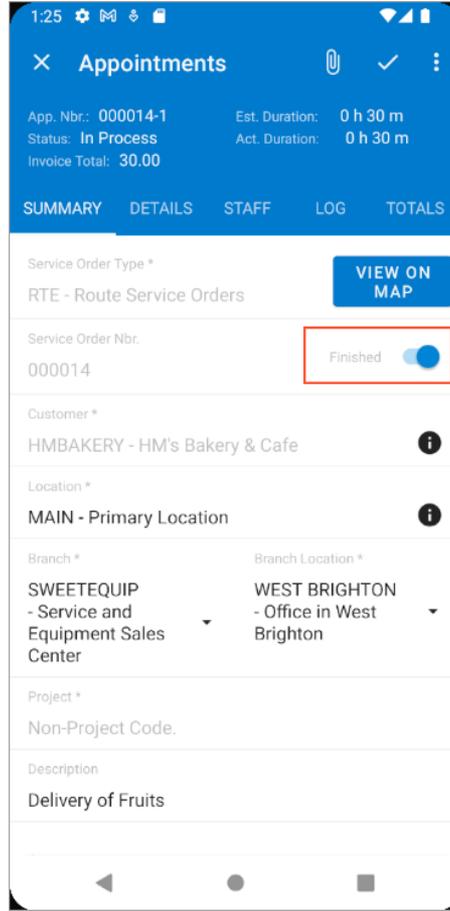
**Figure: The signature in the report**



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



**Figure: The Finished option button**



# Closing the Route Execution and Generating Billing Documents

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## 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 Date: 1/31/2023 ▾

Billing Cycle:  🔍 \* Billing Period: 01-2023 🔍

Billing Customer:  🔍

Up to Date: 1/31/2023 ▾ 2

Ignore the Time Frame

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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 checked="" type="checkbox"/>	<input type="checkbox"/>	RTE	<a href="#">000014-1</a>	HMLBAKERY - HM's...	MAIN	APAP	1/31/2023	<a href="#">000014</a>	1/31/2023	9:08 AM	9:38 AM	<a href="#">WEST BRIGHTON</a>	Closed
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	RTE	<a href="#">000015-1</a>	GOODFOOD - Goo...	MAIN	APAP	1/31/2023	<a href="#">000015</a>	1/31/2023	10:51 AM	11:21 AM	<a href="#">WEST BRIGHTON</a>	Closed



Thank you!

Valentina Diaz