



Service Management Extended Scenarios 2022 R2

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Lead Business Analyst

Timing and Agenda

May 4, 2023 -10 AM -11.00 AM

Day 1

Lesson 1: Recording Staff Time in Appointments

Lesson 2: Processing Sales Order-Related Service Orders

Lesson 3: Processing Service Orders with Items to Be Purchased

May 5, 2023 -10 AM -11.00 AM

Day 2

Lesson 4: Processing Case-Related Service Orders

Lesson 5: Processing Opportunity-Related Service Orders

Lesson 6: Correcting Appointments

Lesson 7: Processing Prepayments for Service Orders

Day 1

Lesson 1: Recording Staff Time in Appointments

Learning Objectives

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

- Assign a staff member to an appointment to perform all services, and record the time spent on the appointment
- Assign staff members to each particular service of the appointment, and record the time spent on providing a particular service of the appointment

Staff Time in Appointments: To Record Staff Time Spent in an Appointment

Suppose that the management of the SweetLife Service and Equipment Sales Center has decided to track the time activities of its employees. Further suppose that for the GoodFood One Restaurant customer, staff members of the SweetLife Service and Equipment Sales Center attend regular appointments to deliver training services. Only one staff member attends each appointment, and this staff member works during the whole appointment. Thus, the time activity should be created for the whole duration of the appointment.

Acting as a staff member (Chase Frank), you will start and complete an appointment, and then review the time activity that has been created for the appointment.

Figure: Calculation of the actual service duration for Example 1



Figure: Calculation of the actual service duration for Example 2

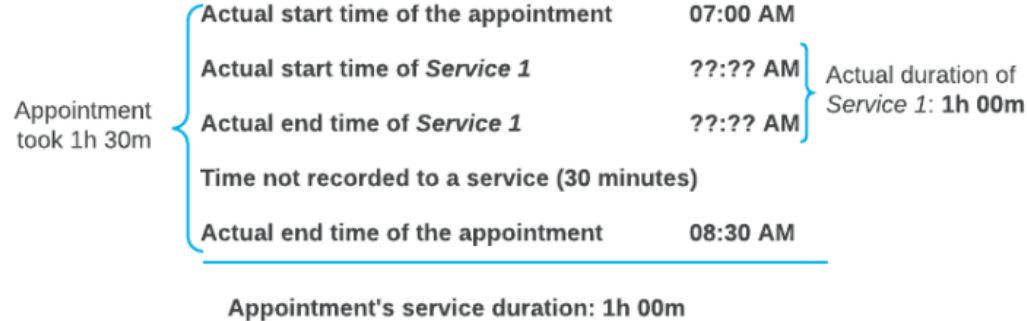


Figure: Calculation of the actual service duration for Example 3



Figure: The time activity of Chase Frank

Employee Time Activities TOOLS ▾

Employee: EP00000042 - Chase Frank 1

From Week: 2023-05 (01/29 - 02/04) 2

Until Week: 2023-05 (01/29 - 02/04)

Project: Project Task: ☐ Include All Rejected

REGULAR OVERTIME TOTAL

Time S... 00:02 00:00 00:02

Billable: 00:00 00:00 00:00

Hold	Status	Date	Time 3	Earning Type	Task	Certified Job	Cost Code	Union Local	Labor Item	WCC Code	Shift Code	Appointment Nbr.	Customer ID	Log Ref. Nbr.	Service 5	Time Spent	Billable 4
> D	<input type="checkbox"/>	Completed	1/29/2023	7:17 AM	RG	<input type="checkbox"/>			CONSULTSR			000044-1	COFFEESHOP	001		00:02	<input type="checkbox"/>

Staff Time in Appointments: To Record Staff Time Spent on a Particular Service

Suppose that the management of the SweetLife Service and Equipment Sales Center has decided to track the time activities of its employees based on service duration. Each staff member must keep accurate records on what service has been performed and enter the actual start and end times of the provided services in appointments.



Acting as staff member Edward Smith, you will record the start and completion times of the service assigned to you and the service assigned to Chase Frank. You will then review the time activities that have been created for the appointment.



Figure: Staff time spent on services



Appointments



MRO 000039-1 - GoodFood One Restaurant


← ↻ ⌂ ⌕ + 🗑️ 📄 ⌕ ⌕ < > >| PAUSE COMPLETE ...


 The operation has completed. 

• Service Order ... MRO - Main  Customer: GOODFOOD - GoodFood One Restaurant  Estimated Duration: 1 h 45 m

Appointment N. 000039-1  • Location: MAIN - Primary Location  Actual Duration: 2 h 00 m

Service Order ... 000039  • Branch Location: WEST BRIGHTON - Office in West Bn  Actual Billable Total: 150.00

Status: In Process Service Contract:  Actual Tax Total: 0.00

• Scheduled Sta. 1/30/2023 • Project: X - Non-Project Code  Invoice Total: 150.00

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

Description: Installation + training

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

🔄 + × ⏮️ ⏭️ ⏪️ ⏩️ ⏴️ ⏵️ All Records ▾

Log Ref. Nbr.	Staff Member	Workgroup	Log Line Status	Travel	Detail Ref. Nbr.	Inventory ID	Description	* Start Date	* Start Time	End Date	End Time	Duration	# / Di
001	EP00000043 - Edward Smith		Completed	<input type="checkbox"/>	0002	INSTALL	Installation of equipment at the customers' ...	1/30/2023	2:00 PM	1/30/2023	3:00 PM	1 h 00 m	
002	EP00000042 - Chase Frank		Completed	<input type="checkbox"/>	0001	TRAINING	Training on juicer usage (at customer's place)	1/30/2023	3:00 PM	1/30/2023	4:00 PM	1 h 00 m	

Figure: Employee time activity

Employee Time Activities

TOOLS ▾

1

2

Employee: EP00000043 - Edward Smith

From Week: 2023-05 (01/29 - 02/04)

Until Week: 2023-05 (01/29 - 02/04)

Project:

Project Task:

☒ Include All Rejected

REGULAR

OVERTIME

TOTAL

Time S... 01:00

00:00

01:00

Billable: 00:00

00:00

00:00

VIEW

Time

2:00 PM

RG

X

CONSULTSR

000039-1

GOODFOOD

001

INSTALL

4

Time Spent

01:00

Billable

00:00

Description

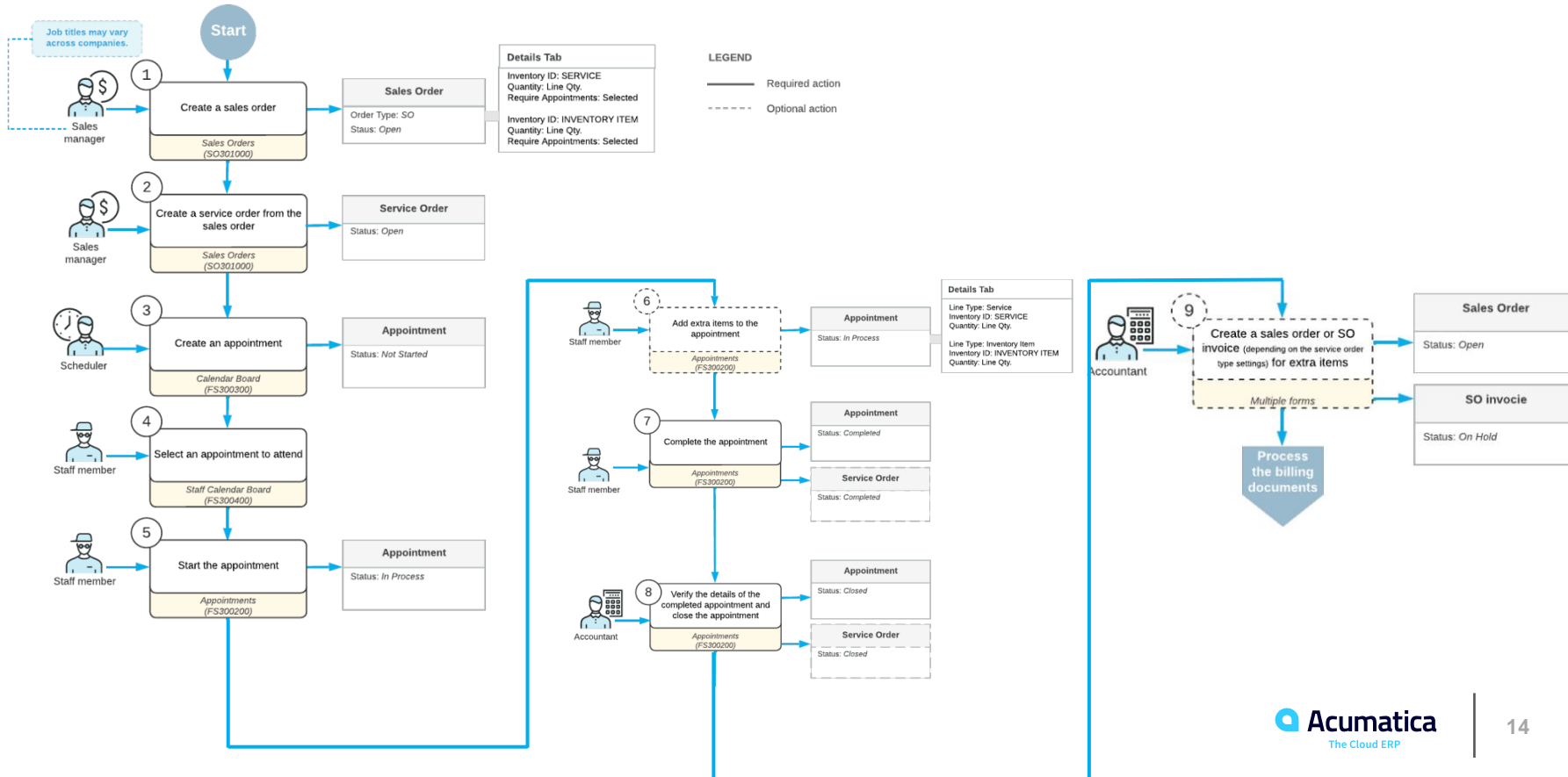
Installation of equipment at the custom

Lesson 2: Processing Sales Order-Related Service Orders

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

- Create a service order from a sales order
- Create an appointment from a sales order
- Process the appointment

Figure: Sales order processing along with service order processing



Sales Order-Related Service Orders: Process Activity

Suppose that SweetLife Service and Equipment Sales Center has sold the GoodFood One Restaurant customer a juicer in combination with installation and repair services. The service manager (Maia Davis) needs to create a sales order for the juicer and the services, and then schedule the appointment to deliver the services.

Further suppose that during the appointment, the customer decides to buy an additional inventory item (a plastic container for juice). The assigned staff member needs to add this item to the service order. The accountant will create a separate sales order for the extra item because it was not in the original sales order. You will perform these actions, acting as the service manager, staff member, and accountant.

Figure: An appointment on the staff board

Staff Calendar Board

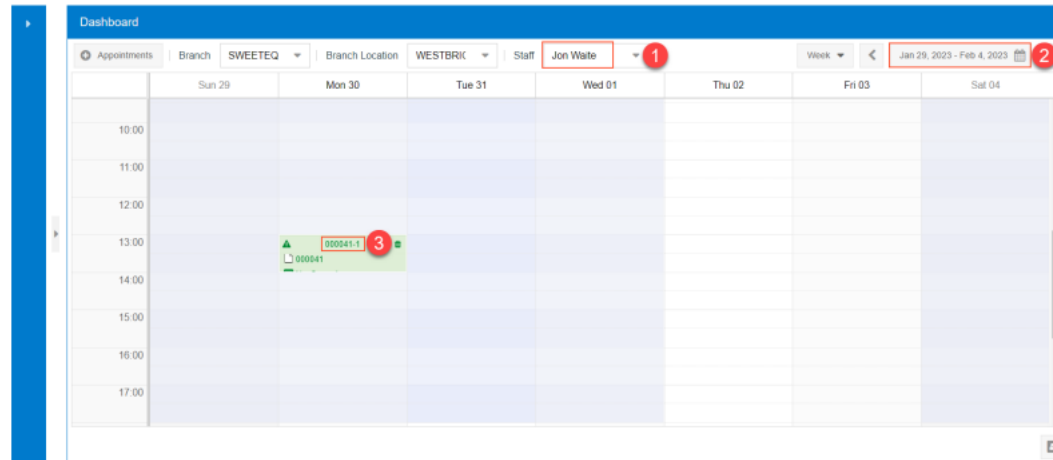


Figure: The sales order generated for the additional item

Sales Orders

IN 000114 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

PREPARE INVOICE HOLD ...

* Order Type: IN * Customer: GOODFOOD - GoodFood One Restau. Ordered Qty.: 1.00
Order Nbr.: 000114 * Location: MAIN - Primary Location Discount Total: 0.00
Status: Open Contact: Tax Total: 0.00
* Date: 1/30/2023 * Project: X - Non-Project Code Order Total: 50.00
* Requested On: 1/30/2023 Description: Sale of a juicer and installation service
Customer Ord...
External Refer...

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS TOTALS

ADD ITEMS ADD MATRIX ITEMS ADD INVOICE LINE DETAILS PO LINK ITEM AVAILABILITY

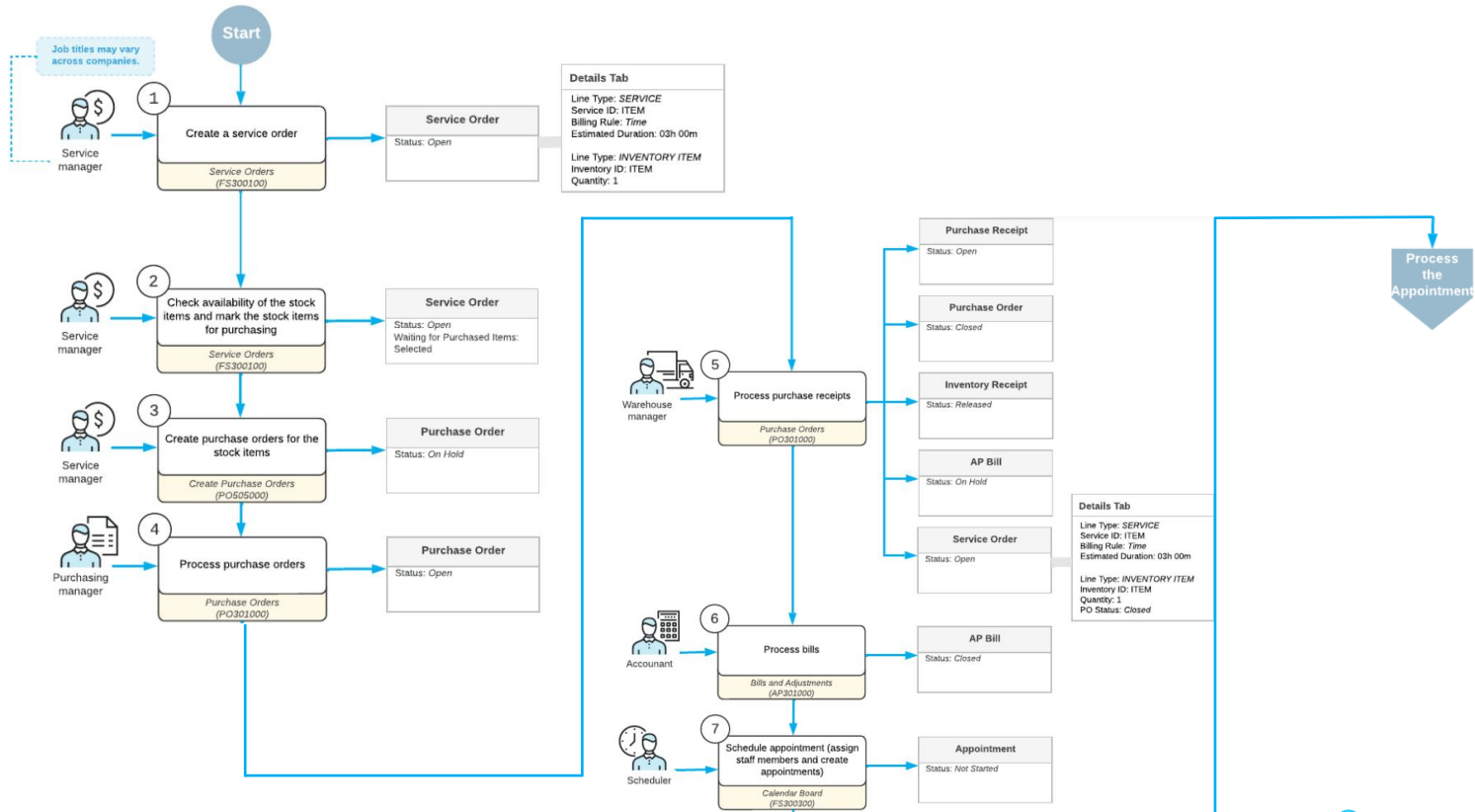
	* Inventory ID	Related Svc. Doc. Nbr.	Require Appointment	Free Item	Warehouse	* Location	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price
>	CONTAINER	INST_000041-1			EQUIHOUSE	MAIN	Containers for Juice	PIECE	1.00	0.00	0.00	50.0000		50.00

Lesson 3: Processing Service Orders with Items to Be Purchased

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

- Create a service order with an item to be purchased
- Create a purchase order that includes at least one item in a service order
- Process a purchase order that includes at least one item in a service order

Figure: Purchase order processing along with service order processing



Service Orders with Items to Be Purchased: Process Activity

Suppose that the SweetLife Service and Equipment Sales Center has announced that it will begin selling a new juicer, JUICER05. The FourStar Coffee & Sweets Shop customer would like to order this juicer along with training services.

Because this juicer is not yet in stock, the SweetLife Service and Equipment Sales Center needs to first purchase the juicer from the SQUEEZO vendor. When the juicer is received, an appointment to perform the services can be created. Acting as the service manager (Maia Davis), you will create the service order, create the purchase order, and process the purchase order.

Figure: The purchased item

Service Order Details

CUSTOMIZATION ▾ TOOLS ▾



Branch:	SWEETEQUIP - Service and	Service Contract ID:		From Date:	1/1/2023
Branch Location:	WEST BRIGHTON - Office in	Schedule ID:		To Date:	1/31/2023
Customer:	COFFEESHOP - FourStar Ce	Item:			
Location:		Target Equipment:			

Drag column header here to configure filter

Order Type	Order Nbr.	Customer ID	Location ID	Date	Status	Line Type	Inventory ID	Billable	Estimated Quantity	Estimated Amount	Appointment Quantity	Appointment Amount	Appointment Count	Mark for PO	PO Nbr.	PO Status
INST	000060	COFFEESHOP	MAIN	1/30/2023	Open	Service	INSTALL	<input checked="" type="checkbox"/>	1.00	100.00	0.00	0.00	0	<input type="checkbox"/>		
INST	000060	COFFEESHOP	MAIN	1/30/2023	Open	Inventory Item	JUICER05	<input checked="" type="checkbox"/>	1.00	700.00	0.00	0.00	0	<input checked="" type="checkbox"/>	000050	Completed
DEV	000055	COFFEESHOP	MAIN	1/29/2023	Completed	Service	TRAINING	<input checked="" type="checkbox"/>	0.75	37.50	0.75	37.50	1	<input type="checkbox"/>		
DEV	000054	COFFEESHOP	MAIN	1/30/2023	Completed	Service	TRAINING	<input checked="" type="checkbox"/>	0.75	37.50	0.75	37.50	1	<input type="checkbox"/>		
DEV	000053	COFFEESHOP	MAIN	1/30/2023	Completed	Service	TRAINING	<input checked="" type="checkbox"/>	0.75	37.50	0.75	37.50	1	<input type="checkbox"/>		
MRO	000050	COFFEESHOP	MAIN	1/30/2023	Open	Service	CLEANING	<input checked="" type="checkbox"/>	1.00	70.00	0.00	0.00	0	<input type="checkbox"/>		
MRO	000049	COFFEESHOP	MAIN	1/30/2023	Open	Service	REPAIR	<input checked="" type="checkbox"/>	1.00	80.00	0.00	0.00	0	<input type="checkbox"/>		
MRO	000049	COFFEESHOP	MAIN	1/30/2023	Open	Inventory Item	JUICER15	<input checked="" type="checkbox"/>	1.00	2,500.00	0.00	0.00	0	<input type="checkbox"/>		
MRO	000049	COFFEESHOP	MAIN	1/30/2023	Open	Inventory Item	BLADE20	<input checked="" type="checkbox"/>	1.00	500.00	0.00	0.00	0	<input type="checkbox"/>		
QUOT	000048	COFFEESHOP	MAIN	1/30/2023	Copied	Service	REPAIR	<input checked="" type="checkbox"/>	1.00	80.00	0.00	0.00	0	<input type="checkbox"/>		

Day 2

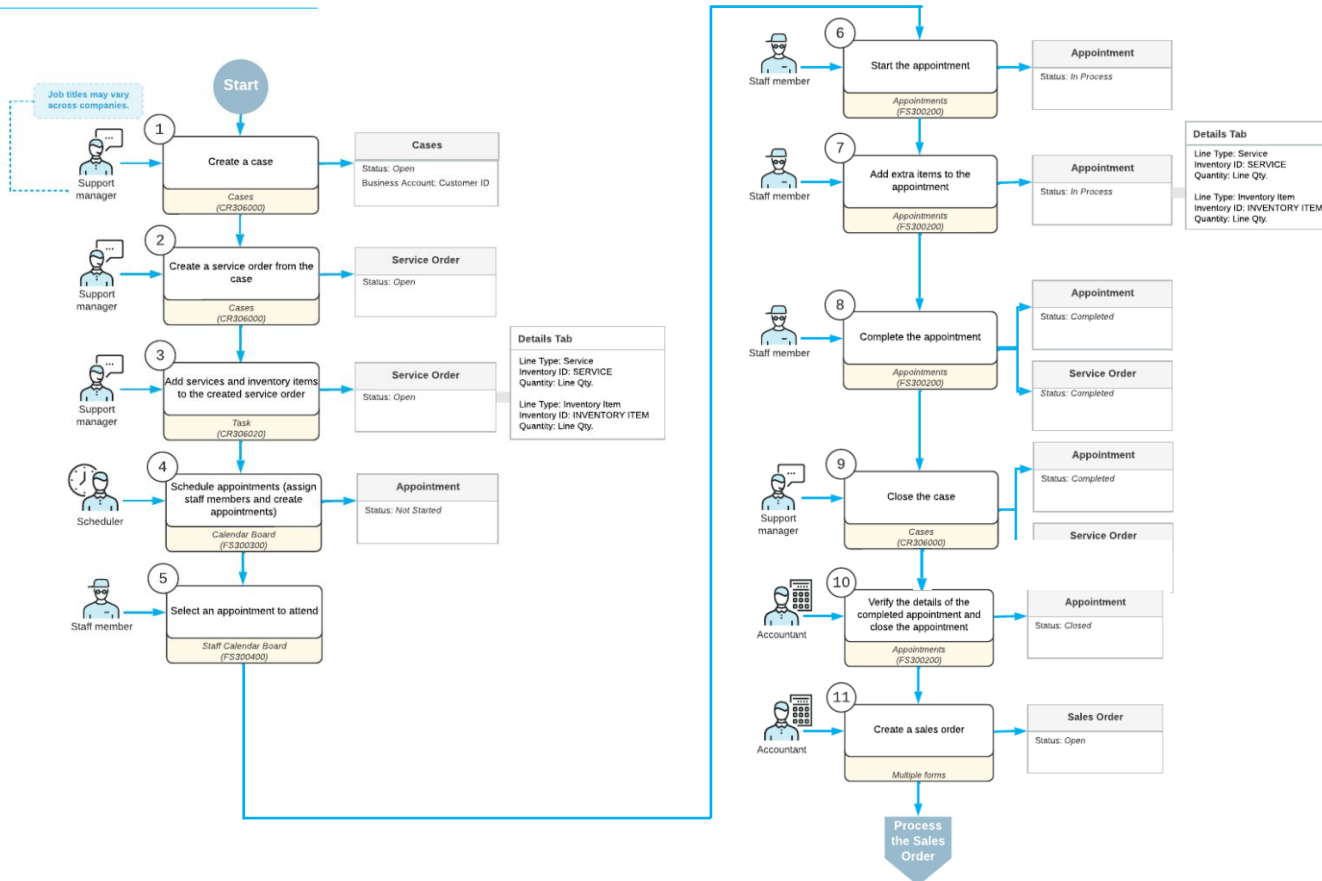
Lesson 4: Processing Case-Related Service Orders

Learning Objectives

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

- Create a case whose resolution requires the provision of services
- Create a service order from a case
- Process an appointment associated with a case
- Close a case

Figure: Case processing along with service order processing



Case-Related Service Orders: Process Activity

The SweetLife Service and Equipment Sales Center provides support to its customers on equipment that the company sells, and these support services are billed to the customer on a per-case basis. The Thai Food Restaurant customer has requested the replacement of a component in a juicer that the company purchased previously.

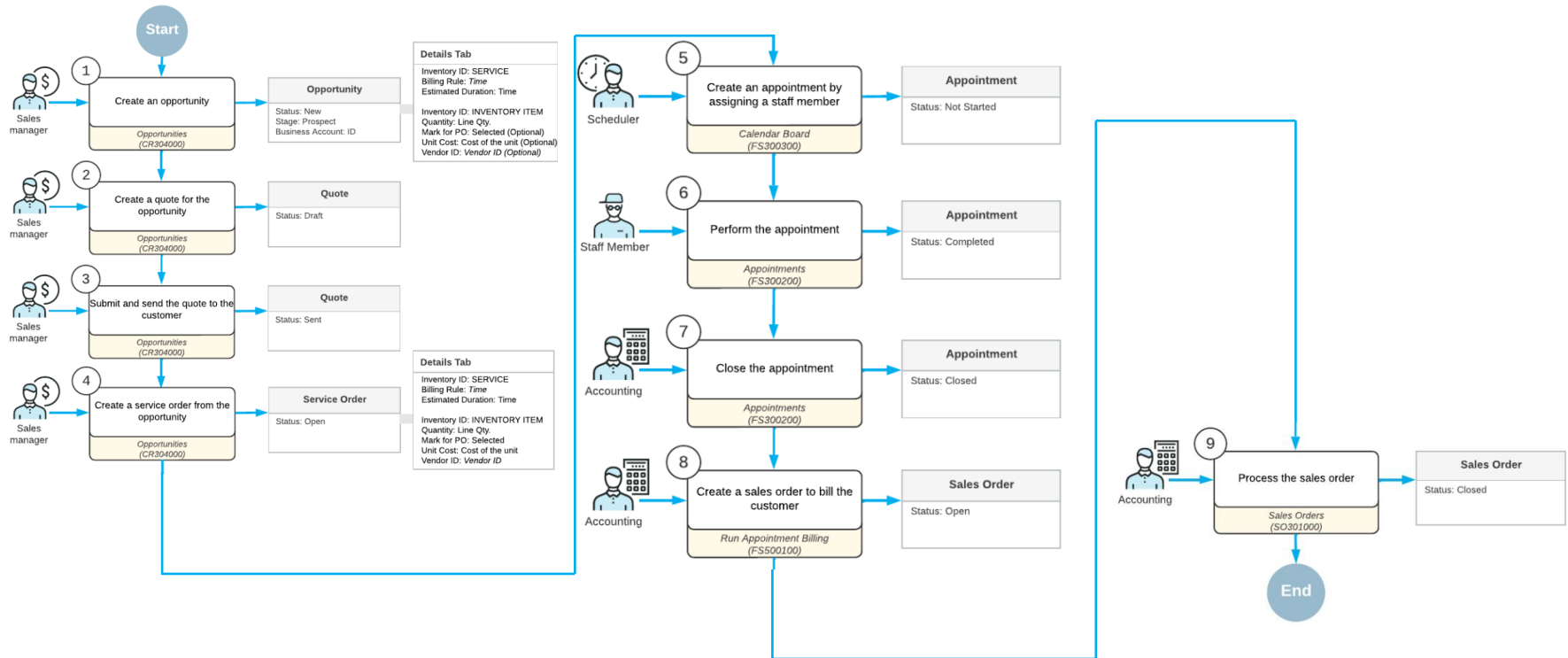
Acting as the service manager of the company (Maia Davis), you will create a case for which an appointment should be scheduled for the replacement services to be performed. Acting as the respective employees, you will also continue the processing of the related service order through the closing of the case.

Lesson 5: Processing Opportunity-Related Service Orders

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

- Create an opportunity that includes at least one service
- Create a sales quote associated with the opportunity, and send it to the customer
- Create a service order from the opportunity
- Create an opportunity-related appointment for the service order

Figure: Opportunity processing along with service order processing



Opportunity-Related Service Orders: Process Activity

Suppose that the Thai Food Restaurant customer has called and requested a proposal for some products of the SweetLife Service and Equipment Sales Center, along with installation services for the products. The service manager (Maia Davis) has received the opportunity and needs to enter it into the system. She then needs to prepare a sales quote and send it to the customer for review.

Further suppose that after reviewing the proposal, the customer decides to procure the company for the services and products, making the opportunity won. The service manager then needs to prepare a service order based on the opportunity, and schedule an appointment for a staff member. You will act as the service manager in performing all of these actions.

Lesson 6: Correcting Appointments

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

- Correct an appointment and generate a new AR invoice
- Find an appointment in the system if the related billing document was deleted

Appointment Correction: Process Activity

Suppose that HM's Bakery & Cafe ordered a training on juicer usage for newcomers. A service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center created an appointment and included a training service item. The assigned staff member (Todd Bloom) performed the necessary service at the customer location and completed the appointment in the system. The accountant (Yona Jones) closed the appointment and generated an AR invoice.

Further suppose that after the invoice was generated, the service manager learned that at the end of the appointment where the training was delivered, the staff member performed a repair of a juicer. The service manager contacted the customer and both parties agreed to include the repair service in the previously created appointment, and to generate an updated AR invoice. Acting as the service manager, you will perform the needed steps to update the appointment and generate a new AR invoice, which the accountant will process further.

Figure: Newly generated invoice

Invoices and Memos

Invoice 000133 - HM's Bakery & Cafe

NOTES ACTIVITIES FILES TOOLS

REMOVE HOLD ...

Type: Invoice Customer: HMBAKERY - HM's Bakery & Cafe Detail Total: 180.00

Reference Nbr.: 000133 Location: MAIN - Primary Location Discount Total: 0.00

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

Date: 2/16/2023 Due Date: 3/18/2023 Apply Retainage Balance: 180.00

Post Period: 02-2023 Cash Discount: 3/18/2023 Pay by Line Cash Discount: 0.00

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

Description: Training on juicer usage (at customer's place)

DETAILS FINANCIAL ADDRESSES TAXES APPLICATIONS COMPLIANCE

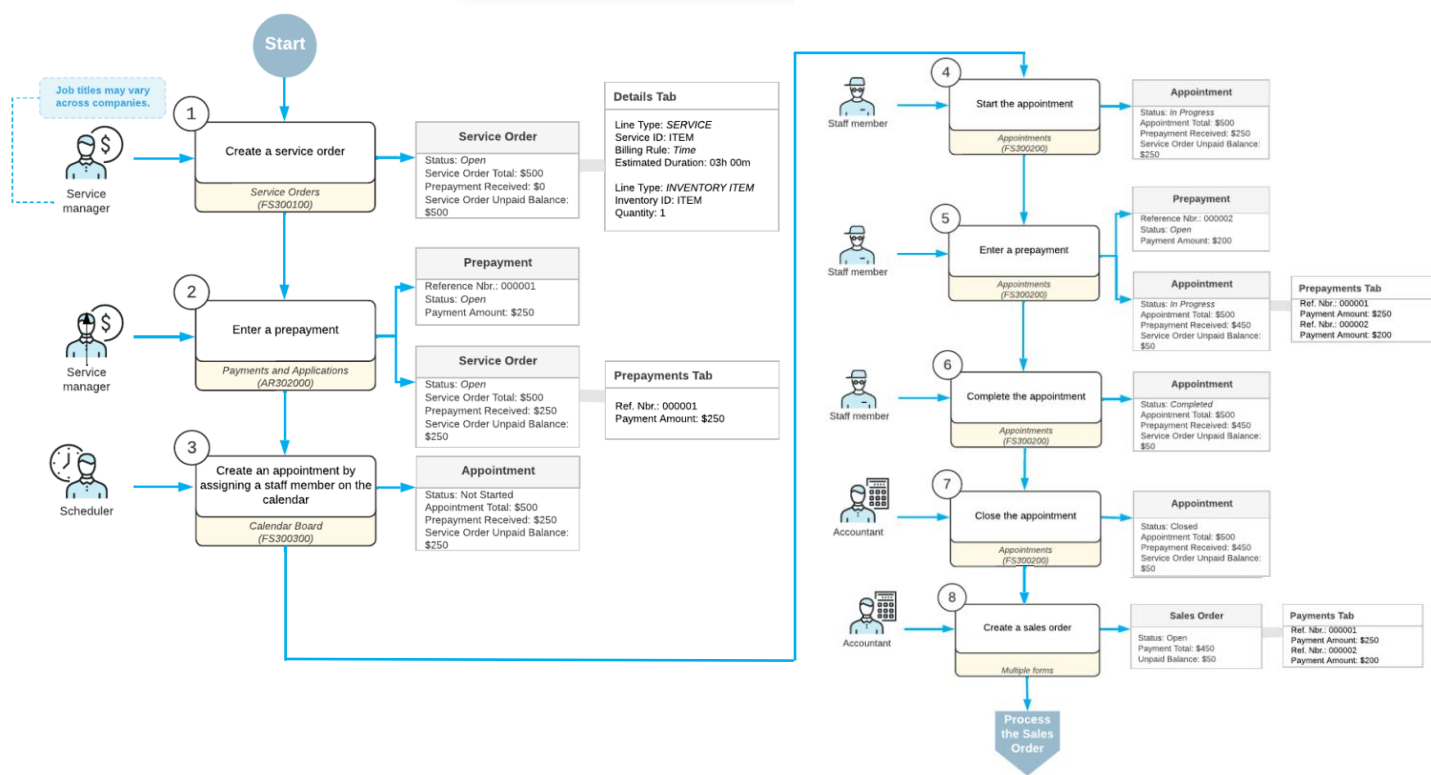
Inventory ID	Related Svc. Doc. Nbr.	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount	* Account	Description
TRAINING	TRN_000018-1	Training on juicer usage (at customer's place)	2.00	HOUR	50.0000	100.00	0.000000	0.00	100.00	40000	Sales Revenue
REPAIR	TRN_000018-1	Repair of customer's equipment	1.00	HOUR	80.0000	80.00	0.000000	0.00	80.00	40000	Sales Revenue

Lesson 7: Processing Prepayments for Service Orders

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

- Create a service order and enter the prepayment to the service order
- Create an appointment and enter the second prepayment for the appointment
- Generate a sales order and review two prepayments applied

Figure: Processing a service order with prepayments



Service Order Prepayments: Process Activity

Suppose that the GoodFood One Restaurant customer has contacted the service manager of the SweetLife Service and Equipment Sales Center to request installation services and a juicer. You will enter the service order into the system and create and schedule the related appointment. The customer has paid 20% of the service order total in advance when requesting the services and the item, and will prepay an additional 30% at the appointment. You will enter the prepayments at the appropriate times, process the appointment, and generate the billing documents.

Figure: The Payments Tab

Sales Orders

IN 000134 - GoodFood One Restaurant

PREPARE INVOICE HOLD ...

Order Type: IN Customer: GOODFOOD - GoodFood One Restaurant Ordered Qty: 1.00
Order Nbr.: 000134 Location: MAIN - Primary Location Discount Total: 0.00
Status: Open Contact: Tax Total: 0.00
Date: 2/3/2023 Project: X - Non-Project Code Order Total: 4,100.00
Requested On: 1/30/2023 Description: Installation of equipment at the customers' place
Customer Ord.:
External Refer.:

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS RELATIONS TOTALS

CREATE PAYMENT CREATE PREPAYMENT CAPTURE VOID CARD PAYMENT IMPORT CARD PAYMENT Active

Doc. Type	Reference Nbr.	Applied To Order	Transferred to Invoice	Balance	Status	Payment Ref.	Payment Method	Cash Account	Payment Amount	Currency	Proc. Status
Prepayment	000075	820.00	0.00	0.00	Open	0006	CHECK	10200EQ	820.00	USD	
Prepayment	000076	1,230.00	0.00	0.00	Open	0007	CHECK	10200EQ	1,230.00	USD	

Not Released: 0.00
Authorized: 0.00
Released: 0.00
Total Paid: 0.00
Total Transferr...: 0.00
Unpaid Balance: 4,100.00
Unbilled Balan...: 4,100.00



Thank you!

Ashani Jayakody