



# V100 Service Management Implementation and Processing

Valentina Diaz

Business Analyst

# Timing and Agenda

---

**June 05, 2023 -10 AM -11:30 AM**

**Day 1**

**Lesson 1: Reviewing Basic Service Management Configuration**

**Lesson 2: Creating Branch Locations**

**Lesson 3: Creating Service Order Types**

**Lesson 4: Creating Service Classes**

**Lesson 5: Creating Services**

**Lesson 6: Creating Staff Members**

**Lesson 7: Creating Skills**

**June 06, 2023 -10 AM - 11:30 AM**

**Day 2**

**Lesson 8: Adding and Assigning Licenses**

**Lesson 9: Creating Service Areas**

**Lesson 10: Creating Staff Schedules**

**Lesson 11: Creating Billing Cycles**

**Lesson 12: Creating Resource Equipment**

# Timing and Agenda

---

**June 07, 2023 -10 AM - 11:30 AM**

**Day 3**

**Lesson 13: Processing Service Orders with One Appointment**

**Lesson 14: Adding Services and Appointments to Service Orders**

**Lesson 15: Quick Processing of Service Orders**

**Lesson 16: Quickly Creating Appointments**

**Lesson 17: Assigning Staff Members to Service Orders and Appointments**

**June 08, 2023 -10 AM - 11:30 AM**

**Day 4**

**Lesson 18: Using Resource Equipment in Appointments**

**Lesson 19: Quickly Processing Appointments**

**Lesson 20: Billing Appointments**

**Lesson 21: Processing Quotes**

**Lesson 22: Processing Appointments in the Mobile App**



Part 1: Configuring Service Management

Part 2: Processing Service Documents

Part 3: Processing Service Documents in the  
Mobile App

# Company Story

---

## Company Structure

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

- **SweetLife Head Office and Wholesale Center:** This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- **SweetLife Store:** This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- **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.

# Company Story

---

## Operational Activity

The company has been operating starting in the 01-2022 financial period. In November 2022, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. The equipment center has begun its operations in 01-2023 in response to the company's growth.

The base currency of the company and its subsidiaries is the U.S. dollar (USD). All amounts in documents and reports are expressed in U.S. dollars unless otherwise indicated.

# Company Story

---

## SweetLife Company Sales and Services

Each SweetLife company's branch has its own business processes, as follows:

- **SweetLife Head Office and Wholesale Center:** In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- **SweetLife Store:** In the store, retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).
- **SweetLife Service and Equipment Sales Center:** This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

# Company Story

---

## Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors.

The company also purchases juicers and juicer parts from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.



Day 1

# Lesson 1: Reviewing Basic Service Management Configuration

---

## Learning Objectives

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

- Learn about the settings that have to be specified
- Enable the needed system features
- Review the minimum required settings for the service management functionality

# Basic Service Management Configuration: Implementation Activity

---

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 the processing of service orders and the scheduling and processing of appointments.

# Figure: Service management settings

Service Management Preferences

NOTES FILES CUSTOMIZATION TOOLS

GENERAL CALENDARS & MAPS MAILING & PRINTING

3

**NUMBERING SETTINGS**

- Batch Numbering Sequence: FSPOST - SM Posting Batch 1
- Staff Schedule Numbering Sequence: FSSCHEDULE - Staff Membe 2
- Equipment Numbering Sequence: FSEQUIP - FS Equipment
- License Numbering Sequence: FSLICENSE - Staff Members'

**APPOINTMENT VALIDATION SETTINGS**

- Skills: Do Not Validate
- Service Areas: Do Not Validate
- Licenses: Do Not Validate
- Overlapping Appointments: Do Not Validate

**GENERAL SETTINGS**

- Enable Time & Expenses Integration
- Enable Rooms
- Enable Default Staff in Service Orders
- Enable Default Resource Equipment in Service Orders
- Enable Workflow Stages
- Manage Multiple Billing Options per Customer
- Alert About Open Appointments Before Service Orders Are Closed
- Require Manual Filtering on Billing Forms
- Track Start and Completion Appointment Locations

**DEFAULT SETTINGS**

- Default Service Order Type: MRO - Maintenance, repair ar
- Default Service Order Type for Sales Ord...: INST - Installation Services
- Default Service Order Type for Cases: MRO - Maintenance, repair ar

# Lesson 2: Creating Branch Locations

---

## Learning Objectives

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

- How a branch location is used in service management, and you will review and create branch locations to become familiar with their settings.

## Branch Locations: Implementation Activity

---

Suppose that an administrative user of the SweetLife Service and Equipment Sales Center previously created the WEST BRIGHTON branch location, which represents the main office of the Service and Equipment Sales Center (which is the SWEETEQUIP branch in the system). The company is now opening a new office of this branch, which is going to provide services.

Acting as an administrative user, you will create a new branch location in the system.

# Lesson 3: Creating Service Order Types

---

## Learning Objectives

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

- How to create a service order type and specify the needed settings.

## Service Order Types Without Inventory Sales: To Create a Service Order Type

---

Suppose that the SweetLife Service and Equipment Sales Center receives an order for consulting services. Acting as an administrative user, you need to create a service order type for service orders and appointments that include only services (that is, no inventory items can be included). AR invoices will be used to bill the customers.



## Service Order Types for Inventory Sales: To Review Sales Order Types

---

Suppose that SweetLife Service and Equipment Sales Center plans to sell inventory items along with the services on the appointments. Acting as the administrative user of the company, you need to configure the system for processing the sales of services and stock items, as well as for scheduling and processing appointments in which services are performed and associated stock items may be sold. Specifically, you need to review the sales order types to be used for sales orders related to service orders and appointments, to be sure their settings are appropriate for sales orders to be used in service management.

## Service Order Types for Inventory Sales (Without Shipping Involved): To Create a Service Order Type

---

Suppose that the SweetLife Service and Equipment Sales Center provides the juicer maintenance and repair services to its customers. Along with these services, the company also sells stock items. Acting as an administrative user, you need to create a service order type for service orders and appointments that include services and may also include stock items; these service orders and appointments will be billed by using SO invoices.

## Service Order Types for Inventory Sales (Shipping May Be Involved): To Create a Service Order Type

---

Suppose that the SweetLife Service and Equipment Sales Center provides juicer installation services to its customers. Along with these services, the company sells stock items. Acting as an administrative user, you need to create a service order type for service orders and appointments that include installation services and may also include stock items; these service orders and appointments will be billed by using sales orders.

## Service Order Types: To Create a Service Order Type for Quotes

---

Suppose that the SweetLife Service and Equipment Sales Center sends quotes with the details of the services and the stock items that will be used during the appointments. These quotes are later converted to service orders. Acting as an administrative user, you need to create a service order type for quotes.

## Service Order Types: To Configure Quick Processing for a Service Order Type

---

Acting as an administrative user of the SweetLife Service and Equipment Sales Center, and you need to configure quick processing for a service order type that has been created in the system. During the quick processing of a service order or appointment of the service order type, the system has to perform the following actions:

- Run the billing for the service order or appointment being processed
- Complete and close the service order being processed
- Prepare and release the associated SO invoice, and send it by email to the customer

# Lesson 4: Creating Service Classes

---

## Learning Objectives

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

- Create a service class
- Select a billing rule for a service class

# Service Classes: To Create a Service Class for Services with Fixed Prices

---

Suppose that SweetLife Service and Equipment Sales Center has decided to provide business consulting services related to juicing, such as developing recipes that are unique to customers' business or establishing a profitable menu pricing system. Acting as the implementation manager, you will create a new service class in the system, which will group the consulting services with similar settings.

## Service Classes: To Create a Service Class for Services Billed by Time

---

Suppose that SweetLife Service and Equipment Sales Center has decided to sell a set of educational services that will include teaching, coaching, and instructing. All these services are going to be billed by time. Acting as an administrative user, you need to create a service class that will contain the general settings of this group of services.



# Lesson 5: Creating Services

---

## Learning Objectives

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

- How to create a new service in Acumatica ERP.

## Services: To Create a Service with a Fixed Price

---

Suppose that SweetLife Service and Equipment Sales Center has hired a chef who has worked at some of the finest restaurants, and the company has recruited him to work as a full-time consultant to develop recipes that are unique to each business. Thus, SweetLife has decided to provide a recipe development service, which will have a fixed price. Acting as the implementation manager, you will create the service in the system.

## Services: To Create a Service Billed by Time

---

Suppose that SweetLife Service and Equipment Sales Center has decided to sell a set of educational services that are going to be billed by time. These services will include teaching, coaching, and instructing. Acting as an administrative user, you will create the Training course service and specify its typical duration and price per hour.

# Lesson 6: Creating Staff Members

---

## Learning Objectives

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

- How to define an employee as a staff member

## Staff Members: Implementation Activity

---

Suppose that the SweetLife Service and Equipment Sales Center needs to define a new employee as a staff member, so that this staff member can be assigned to appointments in Acumatica ERP.

# Lesson 7: Creating Skills

---

## Learning Objectives

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

- Create a skill
- Assign a skill to a staff member
- Assign a skill to a service

## Skills: To Create a Skill

---

Suppose that SweetLife Service and Equipment Sales Center provides multiple services. Each service requires the staff members to have certain skills, and the manager should assign the right person for each service.

Acting as an administrative user of the company, you will create a skill that corresponds to the provided service. As a result, the scheduler will be able to assign appointments to a staff member whose skills match the included service or services.

## Skills: To Assign a Skill to a Service

---

Suppose that SweetLife Service and Equipment Sales Center started to provide the cleaning service. It offers cleaning, which is billed by hours. The staff member who conducts this type of service must have strong skills related to using and cleaning the juicers, so the manager has to be able to assign the right person to provide this service.

Acting as an administrative user, you will assign the cleaning skill to the cleaning service. As a result, the scheduler can assign staff members whose skills match the service or services included in the appointment.



## Skills: To Assign a Skill to a Staff Member

---

Suppose that SweetLife Service and Equipment Sales Center provides multiple services, which makes assigning staff to appointments more complex. The services require the staff members to have certain skills, and the manager wants to assign the right person for each service.

Acting as a service manager, you will add a particular skill to a staff member. As a result, the scheduler can assign appointments to the staff members whose skills match the included service or services.

## Day 2

# Lesson 8: Adding and Assigning Licenses

---

## Learning Objectives

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

- Create a license type
- Assign a license type to a service
- Add a license
- Assign license information to an employee

## License: To Create a License Type and Assign It to a Service

---

Suppose that the SweetLife Service and Equipment Sales Center wants to keep track of the licenses its employees have. This will give service managers the ability to assign the right employee to each appointment, because for some services, a license can be a requirement for performing this service. Before adding license information to the system, you need to create the appropriate license types based on which the licenses will be added for individual users.

Acting as an administrative user, you will create a license type and then assign this license type to a service to represent which license is required for a staff member who can perform this service.

## License: To Create a License and Assign It to a Staff Member

---

Suppose that SweetLife Service and Equipment Sales Center tracks the licenses its employees have. The company also provides services that can be performed only by staff members with licenses. In Acumatica ERP, each license and its settings should be entered, including the employee who owns this license.

Acting as an administrative user, you will create a license record in the system, and assign it to an employee who has the license.

# Lesson 9: Creating Service Areas

---

## Learning Objectives

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

- Create service areas
- Assign a service area to a staff member

## Service Areas: To Add a Service Area and Assign a Staff Member to It

---

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center, and you are adding to the system a new service area where the company plans to provide services for customers.

# Lesson 10: Creating Staff Schedules

---

## Learning Objectives

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

- Create a schedule rule for a particular staff member
- Generate a schedule for a certain period of time



## Staff Schedules: To Create a Schedule Rule and Generate the Work Schedule

---

Suppose that an employee of the SweetLife Service and Equipment Sales Center works from Monday through Friday, 9 AM to 6 PM. Acting as an administrative user, you need to create a schedule rule based on which a particular employee's schedule will be generated in the system and available on the schedule boards.

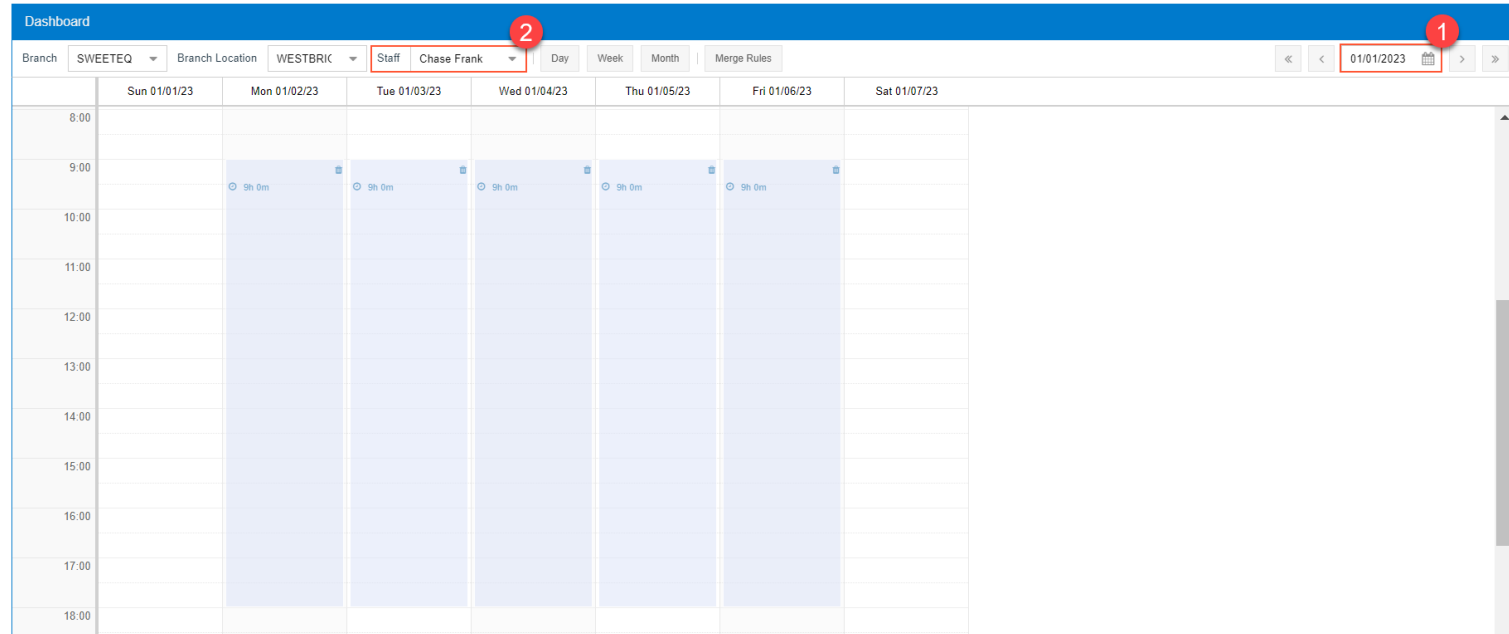
## Staff Schedules: Modifying Working Hours on the Schedule Board

---

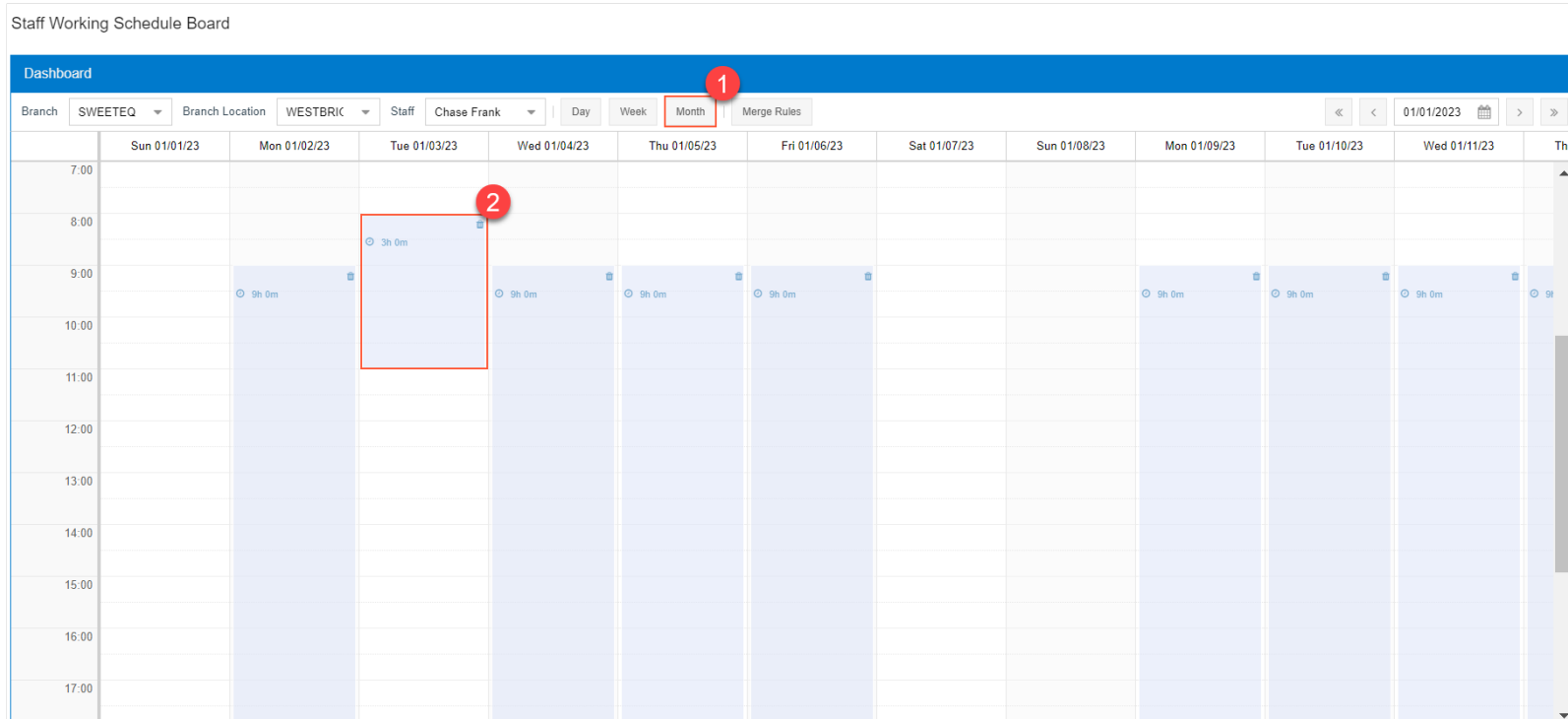
Suppose that the SweetLife Service and Equipment Sales Center needs to more effectively manage the availability of staff members. The service manager wants to know every staff member's working and unavailable hours, as well as to be able to schedule appointments and adjust a staff member's working schedule on the staff schedule board. Acting as a service manager, you will modify the working hours for a particular day. (In this activity, you will also remove working hours for a specific day, for educational purposes.)

# Figure: The Staff Working Schedule Board form

Staff Working Schedule Board



# Figure: Changed working hours



# Lesson 11: Creating Billing Cycles

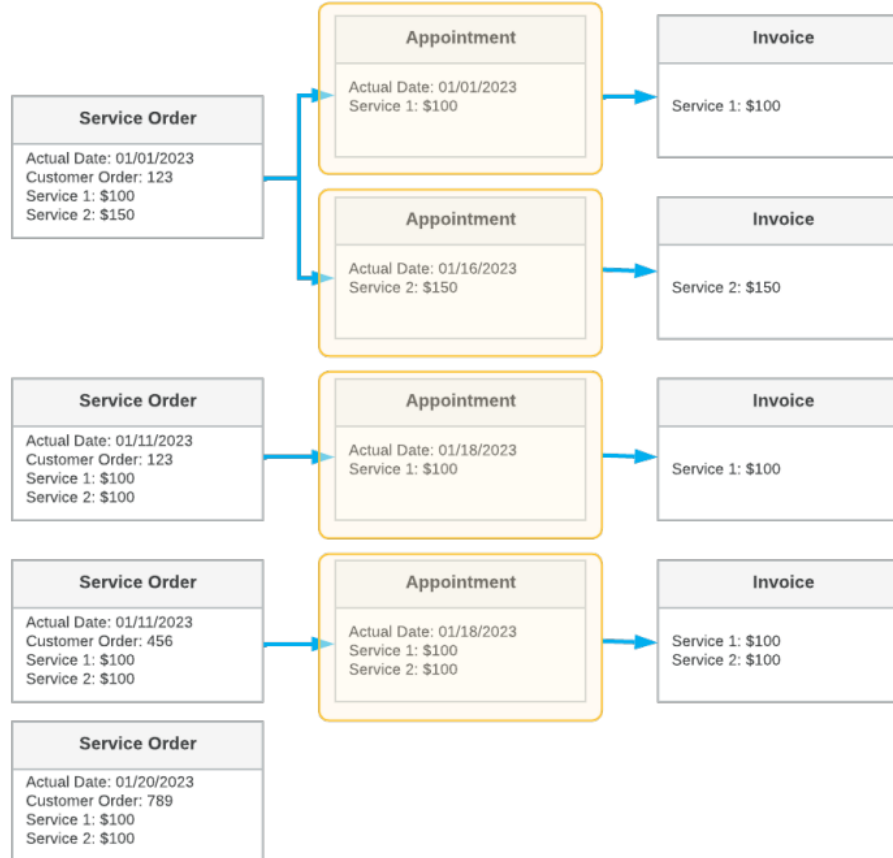
---

## Learning Objectives

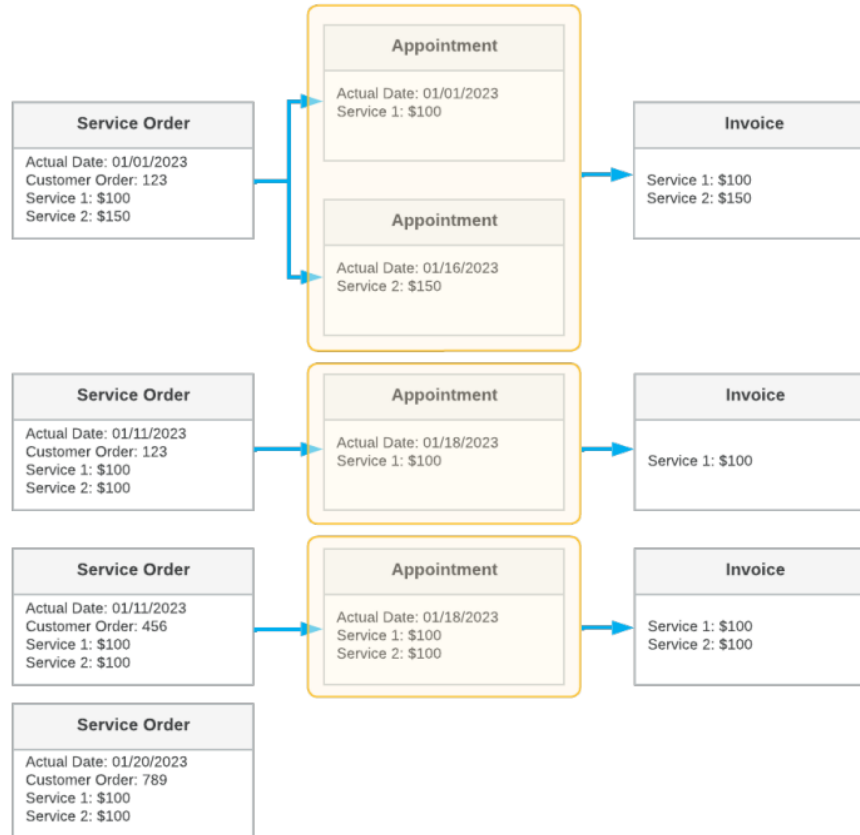
In this lesson, you will learn how to do the following:

- Create a billing cycle
- Assign a billing cycle to a customer

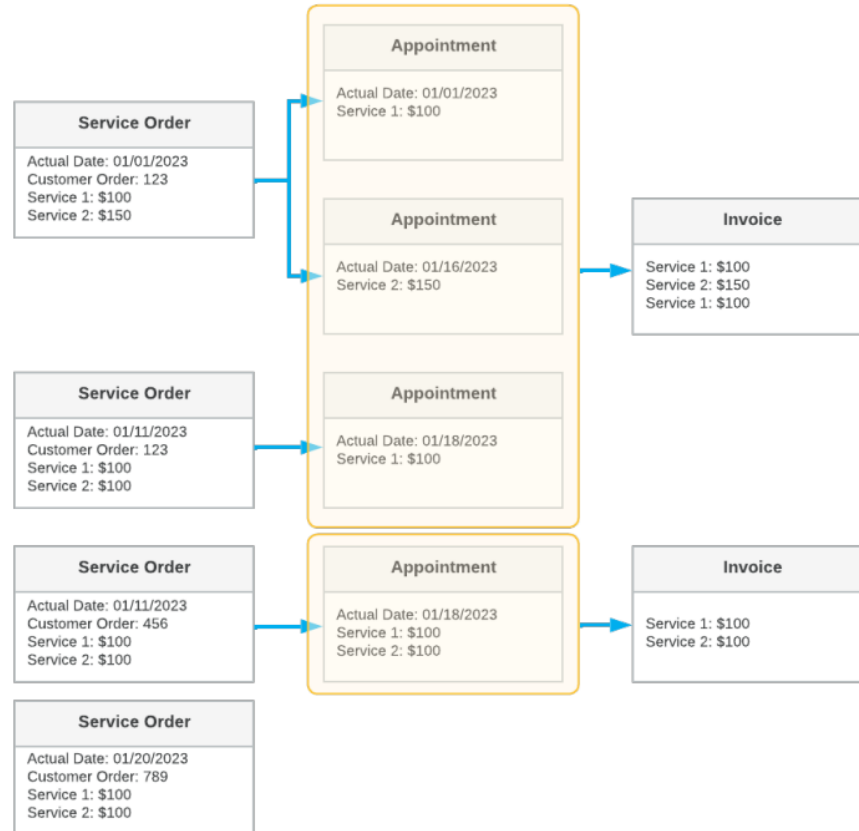
# Figure: Generation for appointments and grouping by appointment



# Figure: Generating billing documents for appointments; grouping by service order

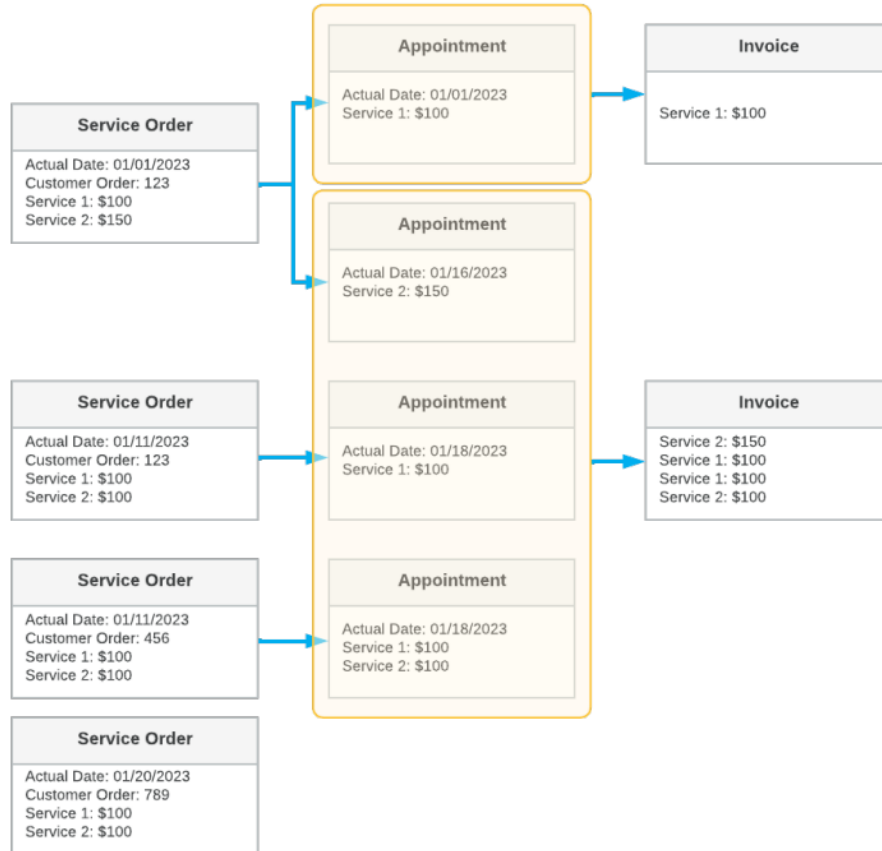


# Figure: Generating billing documents for appointments; grouping by customer order or external reference

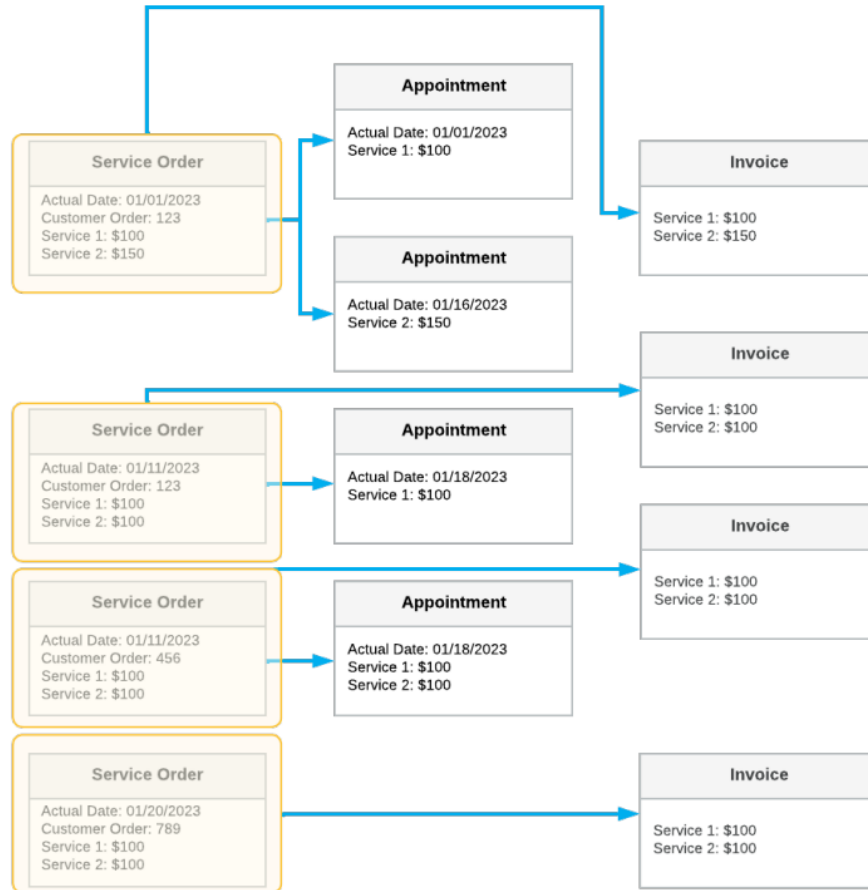




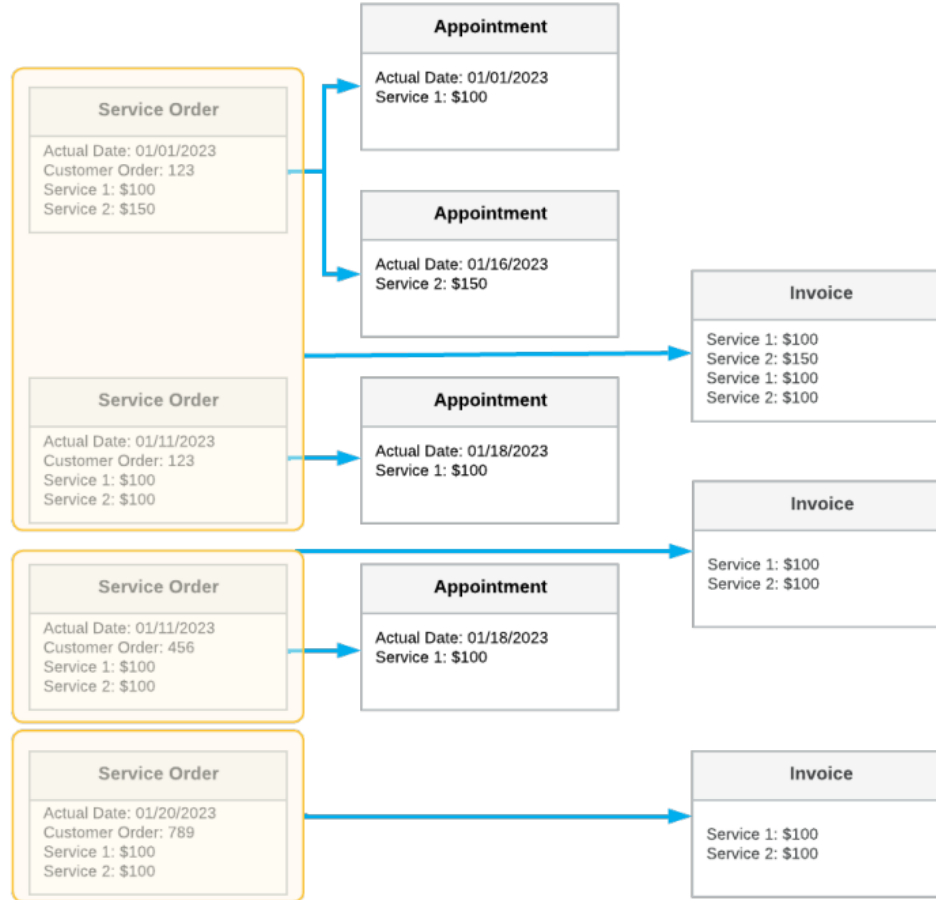
# Figure: Generating billing documents for appointments; grouping by time frame (15th of each month)



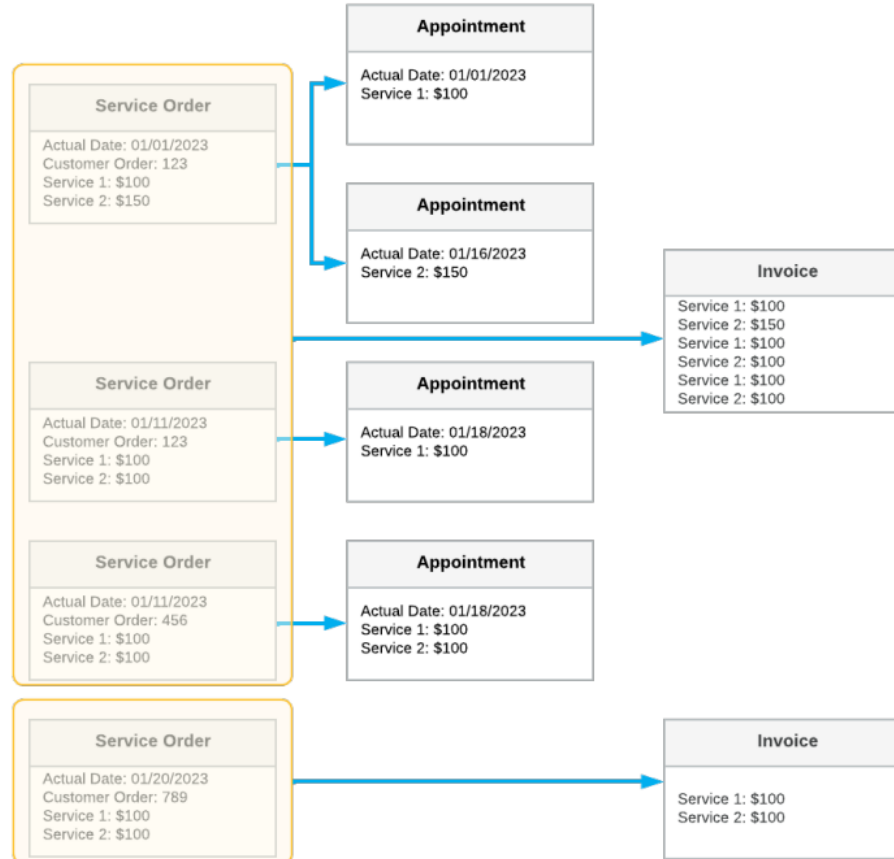
# Figure: Generating billing documents for service orders; grouping by service order



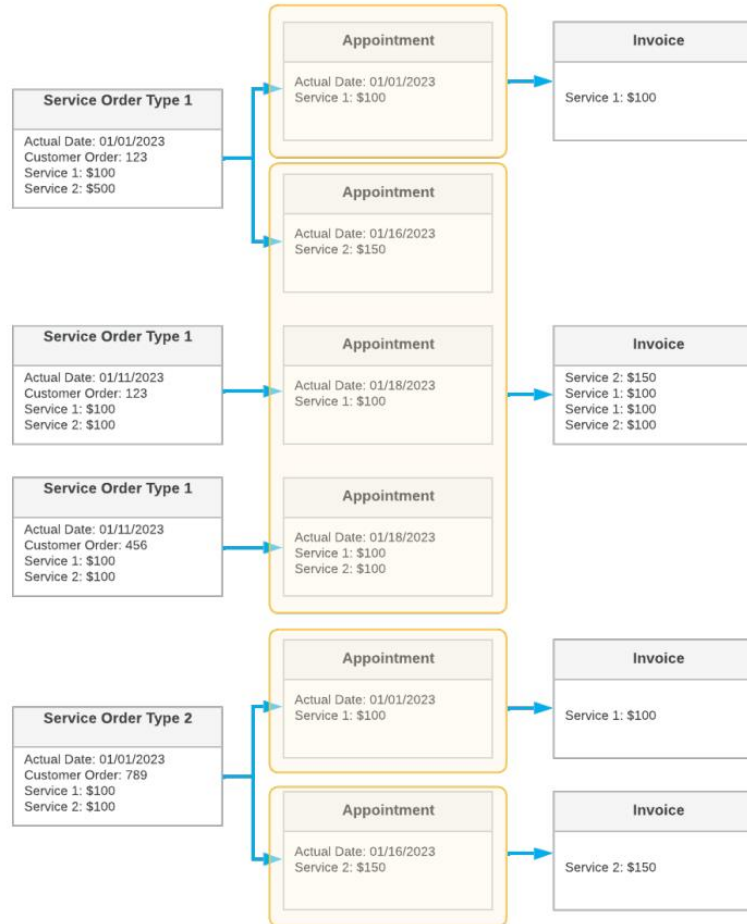
# Figure: Generation for service orders; grouping by customer order or external reference



# Figure: Generation for service orders; grouping by time frame



# Figure: Multiple billing cycles



## Billing Cycles: To Create a Billing Cycle and Assign a Billing Cycle to a Customer

---

Suppose that SweetLife Service and Equipment Sales Center is starting to provide the service of cleaning the juicers. The FRBUN - Cafe French Bun customer is going to order juicer cleaning periodically. The SweetLife Service and Equipment Sales Center wants to bill the customer right after each appointment is performed.

Acting as an administrative user Kimberly Gibbs, you will create a billing cycle that will cause a billing document to be generated for each appointment; each billing document will contain the details of each service of the appointment. Then you will assign the billing cycle to the customer.

# Lesson 12: Creating Resource Equipment

---

## Learning Objectives

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

- Create equipment types
- Assign the equipment types to services
- Create equipment records
- View the equipment history

## Resource Equipment: To Create an Equipment Type and Assign It to a Service

---

Suppose the SweetLife Service and Equipment Sales Center wants to start to keep track of its resource equipment—that is, equipment that staff members use to perform services. Acting as an administrative user of the company, you will create the needed equipment type, which will then be assigned to a service for which staff members providers need special equipment.



# Figure: The equipment type assigned to the service

Non-Stock Items

REPAIR - Repair of customer's equipment

NOTES ACTIVITIES FILES TOOLS

Inventory ID: REPAIR - Repair of customer's equip Product Workgroup:   
Item Status: Active Product Manager:   
Description: Repair of customer's equipment

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

* Equipment Type ID	Description
<a href="#">DRILL</a>	Drills
<a href="#">SCREWDRIVER</a>	Screwdrivers

# Resource Equipment: To Create Resource Equipment

---

Suppose that you are an administrative user of the SweetLife Service and Equipment Sales Center, and you need to add resource equipment used in appointments to Acumatica ERP.

# Figure: The pieces of equipment you have created

Equipment Summary CUSTOMIZATION ▾ TOOLS ▾

Drag column header here to configure filter

		Equipment Type	Equipment Nbr.	Status	Description	Serial Nbr.	Target Equipmer	Resource Equipmen	Vehicle	Owner Type	Location Type	Custom
>		<a href="#">DRILL</a>	<a href="#">FSE00011</a>	Active	Cheston CHD-6104 10mm Drill		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Company	Company	
		<a href="#">DRILL</a>	<a href="#">FSE00010</a>	Active	Froster FPD-010A 10mm Drill		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Company	Company	
		<a href="#">SCREWDRIVER</a>	<a href="#">FSE00002</a>	Active	Tapria Screwdriver Set		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Company	Company	
		<a href="#">SCREWDRIVER</a>	<a href="#">FSE00001</a>	Active	Vissko Screwdriver Set		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Company	Company	
			<a href="#">FSE00009</a>	Active	Commercial citrus juicer with a production rate of 2 litres per minute		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	<a href="#">COFFEE</a>
			<a href="#">FSE00008</a>	Active	Commercial citrus juicer with a production rate of 2 litres per minute		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	<a href="#">GOODF</a>
			<a href="#">FSE00007</a>	Active	Commercial citrus juicer with a production rate of 1.5 litres per minute		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	<a href="#">GOODF</a>
			<a href="#">FSE00006</a>	Active	Commercial citrus juicer with a production rate of 1.5 litres per minute		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	<a href="#">HIMBAK</a>
			<a href="#">FSE00005</a>	Active	Commercial citrus juicer with a production rate of 2 litres per minute		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer	Customer	<a href="#">TOMYU</a>
			<a href="#">FSE00004</a>	Active	Mercedes-Bens S3500	MGMTS5C85S3481099	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Company	Customer	
			<a href="#">FSE00003</a>	Active	Nisan NV200	KNDMG4C75C6481099	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Company	Customer	

## Day 3

# Lesson 13: Processing Service Orders with One Appointment

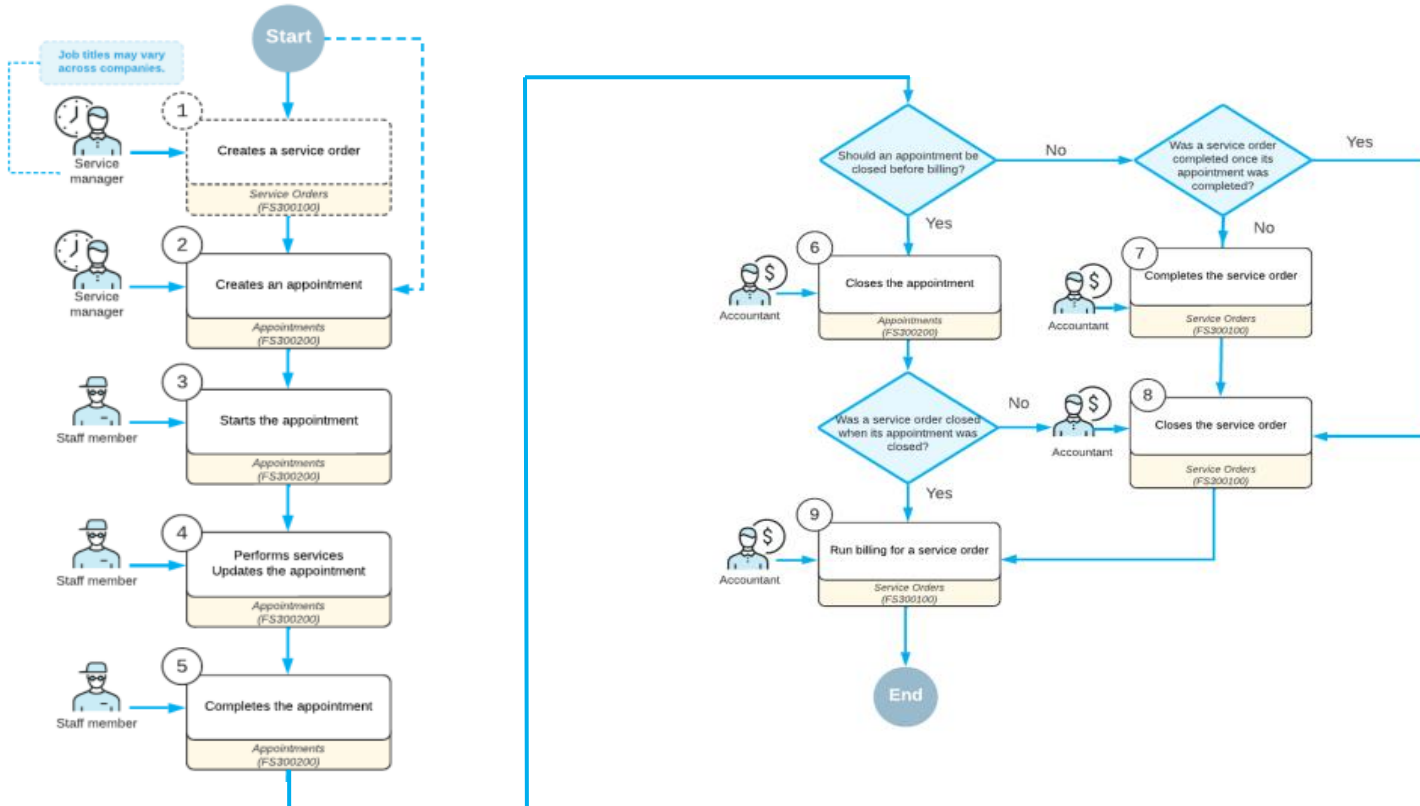
---

## Learning Objectives

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

- Create a service order with the service requested by a customer
- Create an appointment and assign a staff member to perform the service
- Start and complete an appointment
- Close the appointment and run service order billing

# Figure: Processing of a service order



## **Service Order Processing (One Appointment): To Create and Process a Service Order with One Appointment**

---

Suppose that the SweetLife Service and Equipment Sales Center receives an order for the provision of the training service to a customer of the company, FourStar Coffee & Sweets Shop.

The service manager (Maia Davis) needs to enter the service order into the system, assign a staff member, and schedule an appointment to perform the service. The assigned staff member needs to perform the necessary service at the customer location and complete the appointment in the system. (At this point in learning about the service management process, this assignment will be made without regard to employees' qualifications, working hours, and service areas.) Then the accountant will verify the appointment, close the appointment, and generate an AR invoice to bill the customer. You will perform these actions, acting as the service manager, the staff member, and the accountant.

# Figure: The invoice generated for the service order

Invoices and Memos

Invoice 000113 - FourStar Coffee & Sweets Shop

NOTES ACTIVITIES FILES TOOLS

REMOVE HOLD

Type: Invoice Customer: COFFEESHOP - FourStar Coffee & Sweets  
 Reference Nbr.: 000113 Location: MAIN - Primary Location  
 Status: On Hold Currency: USD 1.00 VIEW BASE  
 Date: 1/30/2023 Terms: 30D - 30 Days  
 Post Period: 01-2023 Due Date: 3/1/2023 Apply Retainage  
 Customer Ord... Cash Discount... 3/1/2023 Pay by Line  
 Project/Contract: X - Non-Project Code

Detail Total: 37.50  
 Discount Total: 0.00  
 Tax Total: 0.00  
 Balance: 37.50  
 Cash Discount: 0.00

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_000044	Training on juicer usage (at customer's place)	0.75	HOUR	50.0000	37.50	0.000000	0.00	37.50	40000	Sales Revenue



# Lesson 14: Adding Services and Appointments to Service Orders

---

## Learning Objectives

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

- Add to an existing service order a new service to be provided to the customer
- Consider the skills of the staff member assigned to the service order
- Create a new appointment to provide the additional service, and add this appointment to the service order

## Service Orders with Added Services and Appointments: Process Activity

---

Suppose that the FourStar Coffee & Sweets Shop customer has contacted the SweetLife Service and Equipment Sales Center to request the training service (TRAINING) in addition to the juicer installation service (INSTALL), which it had requested earlier. The service manager of the Service and Equipment Sales Center has already created a service order that includes the installation service.

Acting as the service manager (Maia Davis), in the existing service order, you will add another service and create another appointment for the training service.

# Figure: The two created appointments

Service Orders

INST 000036 - FourStar Coffee & Sweets Shop

NOTES ACTIVITIES FILES TOOLS

← 📄 🗑️ ↺ + 🗑️ 📄 < > >| COMPLETE QUICK PROCESS **CREATE APPOINTMENT** ...

\* Order Type: INST - Insta Customer: COFFEESHOP - FourStar Coffee & Sweets Estimated Duration: 1 h 45 m  
Order Nbr.: 000036 \* Location: MAIN - Primary Location Estimated Billable Total: 137.50  
Status: Open Currency: USD 1.00 VIEW BASE Estimated Tax Total: 0.00  
\* Date: 1/31/2023 \* Branch Location: WEST BRIGHTON - Office in West Bri Estimated Total: 137.50  
Customer Order: External Refer... \* Project: X - Non-Project Code. Invoice Total: 137.50  
Description: Installation of equipment at the customers' place Billing By: Service Orde...  
 Waiting for Purchased Items  
 Appointments Needed

SETTINGS DETAILS TAXES **APPOINTMENTS** FINANCIAL PROFITABILITY DEFAULT STAFF DEFAULT RESOURCE EQUIPMENT ATTRIBUTES PREPAYMENTS TOTALS >

🔄 |🔍 |🗑️

Appointment Nbr.	Confirmed	Status	* Scheduled Start Time	* Scheduled Start Date	* Scheduled End Date	* Scheduled End Time	Actual Billable Total	Actual Tax Total	Invoice Total	Cost Total
<a href="#">000036-1</a>	<input checked="" type="checkbox"/>	Not Started	9:00 AM	1/31/2023	1/31/2023	10:00 AM	100.00	0.00		0.00
<a href="#">000036-2</a>	<input type="checkbox"/>	Not Started	9:00 AM	1/31/2023	1/31/2023	9:45 AM	37.50	0.00		0.00

# Lesson 15: Quick Processing of Service Orders

---

## Learning Objectives

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

- Process a service order by using the Quick Process command
- Review the generated billing documents

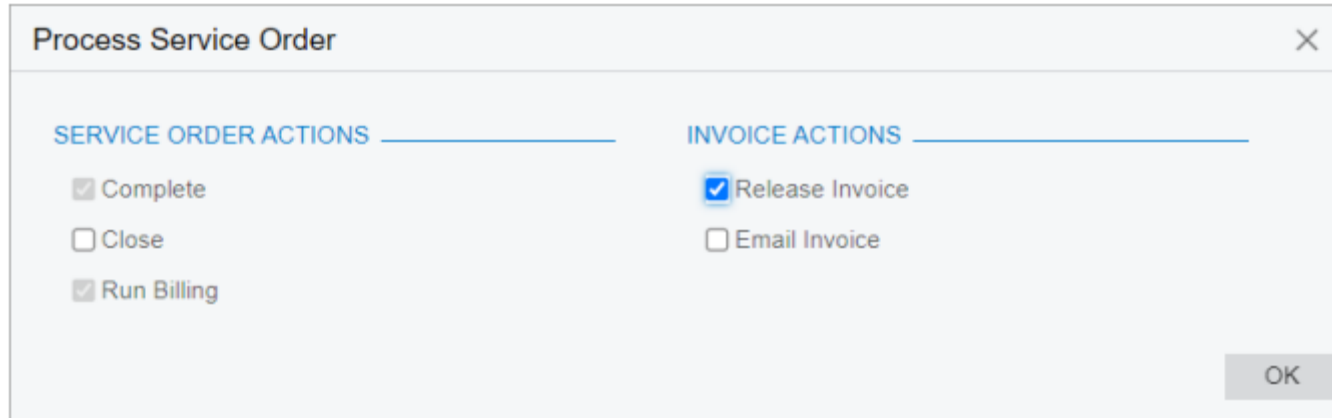
## Figure: The quick processing actions for a service order for which a sales order is to be generated

The screenshot shows a dialog box titled "Process Service Order" with a close button (X) in the top right corner. The dialog is divided into three sections of actions:

- SERVICE ORDER ACTIONS**
  - Allow Billing
  - Complete
  - Close
  - Run Billing
- SALES ORDER ACTIONS**
  - Prepare Invoice
  - Email Sales Order/Quote
- INVOICE ACTIONS**
  - Release Invoice
  - Email Invoice

An "OK" button is located in the bottom right corner of the dialog.

## Figure: The quick processing actions for a service order for which an SO invoice is to be generated



The screenshot shows a dialog box titled "Process Service Order" with a close button (X) in the top right corner. The dialog is divided into two columns of actions:

- SERVICE ORDER ACTIONS**
  - Complete
  - Close
  - Run Billing
- INVOICE ACTIONS**
  - Release Invoice
  - Email Invoice

An "OK" button is located in the bottom right corner of the dialog.

## Quick Processing of Service Orders: Process Activity

---

Suppose that the SweetLife Service and Equipment Sales Center received a call from the FourStar Coffee & Sweets Shop customer about a needed repair of one of its orange juicers. The customer and the service manager (Maia Davis) agreed that billing documents will be generated for the service order before the appointment occurs. The customer also asked to receive the billing document by email.

The service manager has entered the service order and selected a service order type for which quick processing settings have been specified. A user can then invoke one-click quick processing, which initiates the generation of an invoice for the service order.

Acting as an accountant (Yona Jones), you will process the service order for the customer.

# Figure: The Process Service Order dialog box

The screenshot shows the 'Process Service Order' dialog box overlaid on the 'Service Orders' main screen. The main screen displays details for order MRO 000037 at FourStar Coffee & Sweets Shop, including order type, location, date, and estimated totals. The dialog box contains three sections of actions:

- SERVICE ORDER ACTIONS:**
  - Allow Billing
  - Complete
  - Close
  - Run Billing
- SALES ORDER ACTIONS:**
  - Prepare Invoice
  - Email Sales Order/Quote
- INVOICE ACTIONS:**
  - Release Invoice
  - Email Invoice

An 'OK' button is located at the bottom right of the dialog box.



# Figure: The results of the service order processing

The screenshot displays a software interface for managing service orders. At the top, the title is "Service Orders" and the specific order is "MRO 000037 - FourStar Coffee & Sweets Shop". A green button labeled "CREATE APPOINTMENT" is visible. A notification in the top right corner states "The operation has completed." with a green checkmark icon.

The main area shows order details:

- Order Type: MRO - Main
- Order Nbr.: 000037
- Status: Open
- Date: 1/30/2023
- Customer: COFFEESHOP - FourStar Coffee & Sweets
- Location: MAIN - Primary Location
- Branch Location: WEST BRIGHTON - Office in West Brighton
- Project: X - Non-Project Code.
- Estimated Duration: 1 h 00 m
- Estimated Billable Total: 80.00
- Estimated Tax Total: 0.00
- Estimated Total: 80.00

The description of the order is "Repair of customer's equipment".

A "Processing Results" dialog box is open in the center, displaying the following message:

- ✓ The document is successfully processed
- ✓ Document [000113](#) is created.

An "OK" button is located at the bottom of the dialog box.

At the bottom of the interface, there is a table with columns: Branch, Ref. Nbr., Line Status, Line Type, Inventory ID, Billing, Warehouse, Location, UOM, Estimated Duration, Estimated Quantity, Unit Price, and Man Price. The visible row is:

Branch	Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing	Warehouse	Location	UOM	Estimated Duration	Estimated Quantity	Unit Price	Man Price
SWEETEQUIP	0001	Requiring Scheduling	Service	REPAIR	Time	EQUIPHOUSE	MAIN	HOUR	1 h 00 m	1.00	80.0000	

# Figure: The billing documents generated for the service order

Service Orders  
MRO 000037 - FourStar Coffee & Sweets Shop

← 📄 🗑️ ↶ + 🗑️ 📄 ▶️ | COMPLETE **CREATE APPOINTMENT** ...

✔ The operation has completed. ✕

* Order Type:	MRO - Main	Customer:	COFFEESHOP - FourStar Coffee & Sweets	Estimated Duration:	1 h 00 m
Order Nbr.:	000037	Location:	MAIN - Primary Location	Estimated Billable Total:	80.00
Status:	Open	Branch Location:	WEST BRIGHTON - Office in West Brighton	Estimated Tax Total:	0.00
* Date:	1/30/2023	Project:	X - Non-Project Code	Estimated Total:	80.00
Customer Order:		Invoice Total:		80.00	
External Refer...:		Billing By:	Service Order...		
Description:	Repair of customer's equipment			<input type="checkbox"/> Waiting for Purchased Items	
				<input checked="" type="checkbox"/> Appointments Needed	

SETTINGS DETAILS TAXES APPOINTMENTS FINANCIAL PROFITABILITY DEFAULT STAFF DEFAULT RESOURCE EQUIPMENT ATTRIBUTES PREPAYMENTS TOTALS **BILLING DOCUMENTS** OTHER

Allow Billing  
 Billed

🔄 |🔍 |🗑️

Doc. Type	Reference Nbr.	Description	Date	Status
> SO Invoice	INV_000113	Repair of customer's equipment	1/30/2023	Open

# Lesson 16: Quickly Creating Appointments

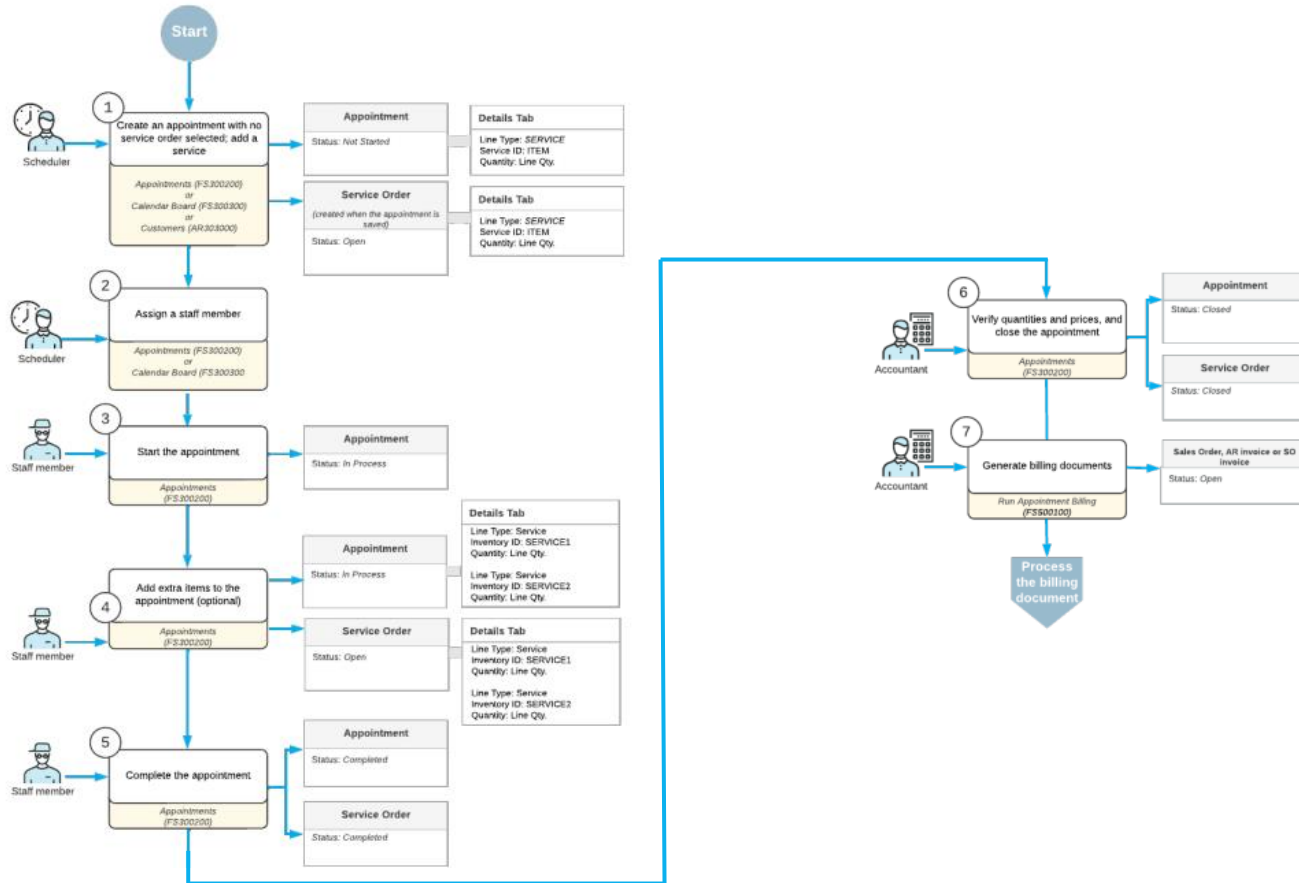
---

## Learning Objectives

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

- Create an appointment directly on the *Appointments* (FS300200) form, add a service to the appointment, assign a staff member to the appointment, and send appointment notification emails to the customer and to the assigned employee.
- Create an appointment on the *Calendar Board* (FS300300) form. You will filter staff members by the performed services and select a staff member whose schedule suits your needs.
- Create an appointment from the *Customers* (AR303000) form, and send notification emails to the customer and to staff members

# Figure: Appointment creation and processing



## Quick Appointment Creation: To Create an Appointment Without Creating a Service Order First

---

Suppose that the GoodFood One Restaurant previously ordered a juicer from the SweetLife Service and Equipment Sales Center with a production rate of 1.5 liters per minute. Now this customer needs installation services for the juicer. The service manager (Maia Davis) and the customer have agreed that the service will be delivered on February 4, 2023, at 9 AM.

Acting as the service manager, you need to create an appointment in the system and assign a staff member who has the needed skill for performing the service.

# Figure: The appointment with the staff member assigned to it

Appointments  
INST 000048-1 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

HOLD **START** DEPART

Service Order: INST - Insta Customer: GOODFOOD - GoodFood One Restaurant Estimated Duration: 1 h 00 m  
Appointment N.: 000048-1 Location: MAIN - Primary Location Actual Duration: 0 h 00 m  
Service Order: 000048 Branch Location: WEST BRIGHTON - Office in West Bri Actual Billable Total: 100.00  
Status: Not Started Project: X - Non-Project Code. Actual Tax Total: 0.00  
Scheduled Sta.: 2/4/2023 Invoice Total: 100.00  
Actual Start D.: 2/4/2023  Waiting for Purchased Items  
Description: Juicer installation

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

ADD STAFF ACTIONS

Ref. Nbr.	* Staff Member	Primary Driver	Detail Ref. Nbr.	Inventory ID	Description	Track Time	Earning Type	Labor Item	Project Task	Cost Code
001	<a href="#">EP00000043 - Edward Smith</a>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	RG	<a href="#">CONSULTSR</a>		

## Quick Appointment Creation: To Create an Appointment on the Calendar Board

---

Suppose that GoodFood One Restaurant has a juicer and wants the SweetLife Service and Equipment Sales Center to perform repairs on the juicer. The service manager (Maia Davis) and the customer have agreed that a staff member will come to repair the juicer on January 30, 2023, at 8 AM. The assigned staff member must have a special skill to repair the juicer, as well as a license from the producer of the juicer.

Acting as the service manager, you will create the appointment and assign a staff member who meets these requirements and can perform the work at the agreed-upon time.

# Figure: An appointment on the calendar board

The screenshot displays the Acumatica Calendar Board interface. On the left, a sidebar titled "Service Orders" shows a list of "Unsigned Appointments (7)". The list includes:

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

The main area is a "Dashboard" calendar view for "Jan 30, 2023". It shows a grid for three staff members: Alberto Jimenez, Edward Smith, and Jon Wale. The time slots range from 7:00 to 14:00. An appointment for "000046-1" is highlighted in green, spanning from 8:00 to 9:00 AM. The appointment details include:

- 000046-1
- 000046
- Not Started
- +1-212-555-0109

Another appointment for "000039-1" is visible for Edward Smith from 9:00 AM to 10:00 AM, with details:

- 000039
- Not Started
- +1 321 459 2410
- Goodfood One Restaura



## Quick Appointment Creation: To Create an Appointment from the Customers Form

---

Suppose that the service manager (Maia Davis) of the SweetLife Service and Equipment Sales Center has received a call from HM's Bakery and Cafe about the repair of a juicer that had been sold to this customer previously. The customer has asked for the repair of the juicer to be performed on February 1, 2023.

The service manager needs to check the history of this customer and schedule the appointment for the repair of the juicer. When the appointment is scheduled, the service manager needs to send confirmation emails both to the assigned employee and to the customer. You will perform these actions, acting as the service manager.

# Figure: An appointment created from the Customers form

Appointment Summary TOOLS ▾

Branch: SWEETEQUIP - Service and Eq Schedule ID:  From Scheduled Date: 1/1/2023  
 Branch Location:  Staff Member:  To Scheduled Date: 2/1/2023  
 Customer: HMBAKERY - HM's Bakery &  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
	SWEETEQUIP	WEST BRIGHTON	INST	000002	000002-1	Installation of equipment at the custo...	HMBAKERY_...	MAIN - Primary...	1/9/2023	12:00 PM	1/9/2023	Billed
	SWEETEQUIP	WEST BRIGHTON	MRO	000023	000023-1	Cleaning Contract	HMBAKERY_...	MAIN - Primary...	1/31/2023	9:00 AM	1/31/2023	Closed
	SWEETEQUIP	WEST BRIGHTON	MRO	000021	000021-1	Cleaning Contract	HMBAKERY_...	MAIN - Primary...	1/31/2023	9:00 AM		Not Started
	SWEETEQUIP	WEST BRIGHTON	RTE	000014	000014-1	Delivery of Fruits	HMBAKERY_...	MAIN - Primary...	1/31/2023	9:07 AM		Not Started
	SWEETEQUIP	WEST BRIGHTON	MRO	000047	000047-1	Repair of customer's equipment	HMBAKERY_...	MAIN - Primary...	2/1/2023	4:00 PM		Not Started

# Lesson 17: Assigning Staff Members to Service Orders and Appointments

---

## Learning Objectives

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

- Assign a staff member to a service of an appointment.
- Assign an appointment to an employee considering employee's working schedule.
- Assign a service order to an employee with consideration of the employee's skills and licenses.

## Appointments: To Assign a Staff Member to a Particular Service Considering Skills and Licenses

---

Suppose that the GoodFood One Restaurant customer has contacted the SweetLife Service and Equipment Sales Center and requested the juicer installation service, along with the training service after installation is completed. The customer wants each employee performing the service to have specific licenses and skills, to be sure that the services will be provided with the highest quality. The service manager, Maia Davis, has already created an appointment in the system.

Acting as the service manager, you now need to assign a staff member to each service of the appointment in accordance with the staff members' skills and licenses and the skills and licenses required for the services.

# Figure: Staff members assigned to services

Appointments  
MRO 000040-1 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

← ↻ 🗑️ 📄 ↩️ + 📄 > |< < > >| HOLD **START** DEPART ...

• Service Order ... MRO - Main ⓘ Customer: GOODFOOD - GoodFood One Restaura ⓘ Estimated Duration: 1 h 45 m  
 Appointment N... 000040-1 ⓘ \* Location: MAIN - Primary Location ⓘ Actual Duration: 0 h 00 m  
 Service Order ... 000040 ⓘ Currency: USD 1.00 ⓘ VIEW BASE Actual Billable Total: 137.50  
 Status: Not Started \* Branch Location: WEST BRIGHTON - Office in West Bri ⓘ Actual Tax Total: 0.00  
 • Scheduled Sta... 1/30/2023 ⓘ Project: X - Non-Project Code ⓘ Invoice Total: 137.50  
 • 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

🔄 + X ADD STAFF ACTIONS |< |> All Records

Ref. Nbr.	* Staff Member	Primary Driver	Detail Ref. Nbr.	Inventory ID	Description	Track Time	Earning Type	Labor Item	Project Task	Cost Code
> 001	<a href="#">EP00000043 - Edward Smith</a>	<input checked="" type="checkbox"/>	0001	<a href="#">INSTALL</a>	Installation of equipment at the customers' place	<input checked="" type="checkbox"/>	RG	<a href="#">CONS...</a>		
002	<a href="#">EP00000042 - Chase Frank</a>	<input type="checkbox"/>	0002	<a href="#">TRAINING</a>	Training on juicer usage (at customer's place)	<input checked="" type="checkbox"/>	RG	<a href="#">CONS...</a>		

## Appointments: To Assign a Staff Member by Using the Calendar Board

---

Suppose that the COFFEESHOP - FourStar Coffee & Sweets Shop customer has contacted the SweetLife Service and Equipment Sales Center and requested the juicer installation service. The customer wants the employee performing the service to have specific licenses and skills, to be sure that the services will be provided with the highest quality. A service order has been entered in the system.

Acting as the service manager (Maia Davis), you now need to create an appointment and assign it to the staff member while considering the staff member's available working hours as well as specific licenses and skills.

# Figure: An unassigned appointment

The screenshot displays a software interface for managing appointments. At the top, a navigation bar includes a search field, a refresh icon, the company name 'SweetLife Fruits & Jams', the current date and time '1/30/2023 2:53 PM', and the user profile 'Maia Davis U100'.

The main area is divided into two panels:

- Calendar Board (Left Panel):** This panel has a tab for 'Unassigned Appointments (1)' (marked with a red circle '1'). Below the tab is a search field containing '000041-1'. A table lists the appointment details, with the first row highlighted in red (marked with a red circle '2').
- Dashboard (Right Panel):** This panel shows a calendar grid for 'Jan 30, 2023'. The columns represent staff members: Alberto Jimenez, Chase Frank, Edward Smith, Jon Waite, Peter Lai, and Todd Bloom. The rows represent time slots from 7:00 to 13:00. An appointment is visible in the 9:00-10:00 slot for Chase Frank and Edward Smith, with details for 'GoodFood One Restaura'.

Appointments	Account Name	Service Order Ty
000041-1	FourStar Coffee ...	INST

	Alberto Jimenez	Chase Frank	Edward Smith	Jon Waite	Peter Lai	Todd Bloom
7.00						
8.00						
9.00		000039-1 000039 Not Started +1 321 459 2410 GoodFood One Restaura	000039-1 000039 Not Started +1 321 459 2410 GoodFood One Restaura			
10.00						
11.00						
12.00						
13.00						

# Figure: An assigned staff member

The screenshot displays a software interface for managing appointments. At the top, a blue header bar contains a search field, a refresh icon, and user information: 'SweetLife Fruits & Jams Service and Equipment Sales ...', '1/30/2023 3:15 PM', and 'Maia Davis U100'. Below the header, the main area is divided into two panels. The left panel, titled 'Calendar Board', has a sub-header 'Service Orders' and 'Unassigned Appointments (0)'. It includes a search field with '00041-1' and a table with columns 'Appointments', 'Account Name', and 'Service Order Ty...'. The right panel, titled 'Dashboard', has a sub-header 'Appointments' and filters for 'Branch', 'Branch Location' (WESTBRIC), 'Staff', and 'Type Name'. It also includes a 'Day' dropdown and a date selector for 'Jan 30, 2023'. The main content of the dashboard is a calendar grid. The columns are labeled 'Edward Smith' and 'Jon Wate'. The rows represent time slots from 9:00 to 15:00. A red box labeled '1' highlights the name 'Jon Wate' in the top row. A red box labeled '2' highlights an appointment card for '00041-1' in the 13:00 slot under the 'Jon Wate' column. The appointment card details include: '00041-1', '00041', 'Not Started', '+1-212-555-0195', 'FourStar Coffee &', and 'Primary Location'.



## Service Orders: To Assign a Service Order to a Staff Member by Using the Calendar Board

---

Suppose that the COFFEESHOP - FourStar Coffee & Sweets Shop customer has contacted the SweetLife Service and Equipment Sales Center and requested the training service. The service order has been entered in the system.

Acting as the service manager (Maia Davis), you now need to assign a staff member to perform the service included in the service order. While performing this assignment, you need to consider the staff member's available working hours, skills, and licenses.

# Figure: An assigned staff member

The image displays two side-by-side software panels. The left panel, titled 'Service Orders', has a search bar containing '000042' and a table with columns for 'Service Order', 'Account Name', and 'Order Type'. The right panel, titled 'Dashboard', shows a staff assignment grid for 'Branch SWEETEQ' and 'WESTBRK'. The grid lists staff members 'Chase Frank' and 'Todd Bloom'. A service order entry is visible for 'Todd Bloom' at 16:00, with details including '000040-1', '000040', 'Not Started', '+1 321 459 2410', and 'GoodFood One Restaurant'. Red circles highlight: 1) the 'Service Orders' tab, 2) the 'Todd Bloom' staff name, and 3) the service order entry.

## Day 4

# Lesson 18: Using Resource Equipment in Appointments

---

## Learning Objectives

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

- How to add a resource equipment to an appointment, and how to find and review the appointments to which the resource equipment entity has been assigned.

## Use of Resource Equipment in Appointments: To Use Resource Equipment in Appointments

---

Suppose that the SweetLife Service and Equipment Sales Center has its own equipment that is used for repair services and keeps a history of appointments for each item that was used. The service manager (Maia Davis) receives a call from the FourStar Coffee & Sweets Shop customer that the repair of a juicer is necessary on February, 4, 2023.

Acting as the service manager, you will schedule the appointment, while taking into consideration which piece of resource equipment can be used during the time of the appointment. You will also review the history of usage of the selected piece of resource equipment.

# Figure: Appointments related to the resource equipment

Appointment Summary TOOLS ▾

Branch: SWEETEQUIP - Service and Eq      Schedule ID:       From Scheduled Date: 1/1/2023 ▾  
 Branch Location:       Staff Member:       To Scheduled Date: 2/4/2023 ▾ **2**  
 Customer:       Resource Equipment: FSE00001 **1**  
 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
SWEETEQUIP	WEST BRIGHTON	INST	000001	000001-1	Installation of equipment at the customers' ...	TOMYUM - Thai Food Restaur...	MAIN - Primary...	1/7/2023	10:00 AM	1/7/2023	Billed <b>3</b>
SWEETEQUIP	WEST BRIGHTON	INST	000003	000003-1	Installation of equipment at the customers' ...	GOODFOOD - GoodFood Che...	MAIN - Primary...	1/15/2023	11:00 AM	1/15/2023	Billed
SWEETEQUIP	WEST BRIGHTON	INST	000004	000004-1	Installation of equipment at the customers' ...	COFFEEESHOP - FourStar Cof...	MAIN - Primary...	1/18/2023	11:00 AM	1/18/2023	Closed
SWEETEQUIP	WEST BRIGHTON	INST	000006	000006-1	Installation of equipment at the customers' ...	TOMYUM - Thai Food Restaur...	MAIN - Primary...	1/24/2023	9:00 AM	1/24/2023	Closed
SWEETEQUIP	WEST BRIGHTON	MRO	000044	000044-1	Repair of customer's equipment	COFFEEESHOP - FourStar Cof...	MAIN - Primary...	2/4/2023	9:00 AM		Not Started

# Lesson 19: Quickly Processing Appointments

---

## Learning Objectives

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

- Process an appointment by using the Quick Process command
- Review the generated billing documents

## Figure: The quick processing actions for an appointment for which a sales order is to be generated

Process Appointment ×

**APPOINTMENT ACTIONS**

- Close
- Email Signed Appointment
- Run Billing

**SALES ORDER ACTIONS**

- Prepare Invoice
- Email Sales Order/Quote

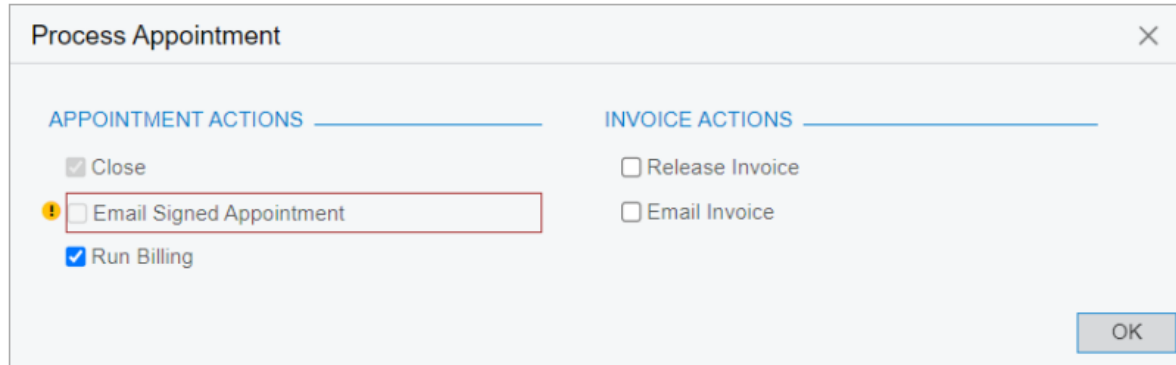
**INVOICE ACTIONS**

- Release Invoice
- Email Invoice

OK



## Figure: The quick processing actions for an appointment for which an SO invoice is to be generated



The screenshot shows a dialog box titled "Process Appointment" with a close button (X) in the top right corner. The dialog is divided into two columns: "APPOINTMENT ACTIONS" and "INVOICE ACTIONS".

**APPOINTMENT ACTIONS**

- Close
- Email Signed Appointment (highlighted with a red border and a yellow warning icon)
- Run Billing

**INVOICE ACTIONS**

- Release Invoice
- Email Invoice

An "OK" button is located in the bottom right corner of the dialog.

## Quick Processing of Appointments: Process Activity

---

Suppose that the SweetLife Service and Equipment Sales Center has received a call from HM's Bakery and Cafe. This customer has requested the repair of one of the orange juicers, and the service manager (Maia Davis) has agreed on the appointment day and time with the customer.

Maia Davis has also created and scheduled the appointment in the system. A staff member, Ricardo Martinez (EP00000044), has visited the customer, provided the repairing service, and completed the appointment. No changes need to be made to the invoice to be generated for this appointment.

Acting as accountant Yona Jones, you will quickly process the appointment, which initiates the automatic closing of the appointment and the generation of an invoice for it. Because the customer has requested that you send the invoice by email, you will include the sending of the released invoice to the customer in this processing.

# Lesson 20: Billing Appointments

---

## Learning Objectives

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

- How to generate billing documents simultaneously for multiple appointments of different customers with different billing cycles assigned.

# Billing of Multiple Appointments: Process Activity

---

The accountant of the SweetLife Service and Equipment Sales Center generates billing documents every day. On January 28, 2023, the accountant (Yona Jones) has to run billing for appointments for the following customers:

- GOODFOOD (GoodFood One Restaurant): For this customer, a billing document is generated for each appointment.
- RETSALE (Individual client): For this customer, a billing document is generated each Monday.
- TOMYUM (Thai Food Restaurant): For this customer, one billing document is generated for each service order; it includes all appointments of the service order.

The service orders for all these customers are of a service order type that is defined to generate SO invoice. In this activity, you will act as the accountant and run billing for these customers.

# Figure: The batches with the generated billing documents

Processing

Processing completed, 00:01:08 Elapsed

8 Processed ^ 0 Errors v 0 Warnings v 0 Remaining v 8 Total v

Message	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	Status	Description	Batch Nbr.
Record processed successfully.	INST	000005-1	RETSALE - Individ...	MAIN	AP MONDAY	1/28/2023	000005	1/23/2023	3:00 PM	4:00 PM	Closed	Installation of equipm...	SM000011
Record processed successfully.	INST	000005-2	RETSALE - Individ...	MAIN	AP MONDAY	1/28/2023	000005	1/28/2023	9:00 AM	9:45 AM	Closed	Installation of equipm...	SM000011
Record processed successfully.	INST	000006-1	TOMYUM - Thai F...	MAIN	AP SQ	1/24/2023	000006	1/24/2023	9:00 AM	10:00 AM	Closed	Installation of equipm...	SM000010
Record processed successfully.	INST	000006-2	TOMYUM - Thai F...	MAIN	AP SQ	1/28/2023	000006	1/28/2023	10:00 AM	10:45 AM	Closed	Installation of equipm...	SM000010
Record processed successfully.	MRO	000007-1	RETSALE - Individ...	MAIN	AP MONDAY	1/28/2023	000007	1/28/2023	11:00 AM	12:00 PM	Closed	Service on cleaning of...	SM000011
Record processed successfully.	MRO	000008-1	TOMYUM - Thai F...	MAIN	AP SQ	1/28/2023	000008	1/28/2023	2:00 PM	3:00 PM	Closed	Service on cleaning of...	SM000010
Record processed successfully.	MRO	000009-1	GOODFOOD - Go...	MAIN	AP AP	1/28/2023	000009	1/28/2023	2:00 PM	2:45 PM	Closed	Training on juicer usa...	SM000009
Record processed successfully.	MRO	000009-2	GOODFOOD - Go...	MAIN	AP AP	1/28/2023	000009	1/28/2023	5:00 PM	6:00 PM	Closed	Training on juicer usa...	SM000009

← | →

CLOSE

# Figure: A separate invoice generated for each appointment

Service Billing Batches TOOLS ▾

Batch Nbr.: SM000009  Billing Date: 1/28/2023  
Billing Cycle: AP AP - Generate Invoices from Appointr Billing Period: 01-2023  
Up to Date: 1/28/2023 Documents Pr...: 2

Document	Document Type	Document Nbr.	Invoice Nbr.	Service Order Type	Appointment Nbr.	Billing Customer ID	Billing Customer Name	Service Order Nbr.	Date	Start Time	End Time	Branch Location ID
> SI	INV	000113	000113	1 MRO	000009-1	GOODEFOOD	GoodFood One Restaurant	000009	1/28/2023	2:00 PM	2:45 PM	WEST BRIGHTON
SI	INV	000114	000114	2 MRO	000009-2	GOODEFOOD	GoodFood One Restaurant	000009	1/28/2023	5:00 PM	6:00 PM	WEST BRIGHTON

# Figure: One invoice generated for three appointments

Service Billing Batches TOOLS ▾

Batch Nbr.: SM000011  Billing Date: 1/28/2023

Billing Cycle: AP MONDAY - Generate Invoices from A Billing Period: 01-2023

Up to Date: 1/28/2023 Documents Pr... 3

Document	Document Type	Document Nbr.	Invoice Nbr.	Service Order Type	Appointment Nbr.	Billing Customer ID	Billing Customer Name	Service Order Nbr.	Date	Start Time	End Time	Branch Location ID
> SI	INV	000117	000117	INST	000005-1	RETSALE	Individual Retail Customer	000005	1/23/2023	3:00 PM	4:00 PM	WEST BRIGHTON
SI	INV	000117	000117	INST	000005-2	RETSALE	Individual Retail Customer	000005	1/28/2023	9:00 AM	9:45 AM	WEST BRIGHTON
SI	INV	000117	000117	MRO	000007-1	RETSALE	Individual Retail Customer	000007	1/28/2023	11:00 AM	12:00 PM	WEST BRIGHTON

# Figure: Two invoices generated for three appointments and grouped by service order

Service Billing Batches TOOLS ▾

Batch Nbr.:  Billing Date: 1/28/2023  
Billing Cycle: AP SO - Generate Invoices from Appointr Billing Period: 01-2023  
Up to Date: 1/28/2023 Documents Pr... 3

Document	Document Type	Document Nbr.	Invoice Nbr.	Service Order Type	Appointment Nbr.	Billing Customer ID	Billing Customer Name	Service Order Nbr.	Date	Start Time	End Time	Branch Location ID
> SI	INV	000115	000115	1 INST	000006-1	TOMYJM	Thai Food Restaurant	000006	1/24/2023	9:00 AM	10:00 AM	WEST BRIGHTON
SI	INV	000115	000115	INST	000006-2	TOMYJM	Thai Food Restaurant	000006	1/28/2023	10:00 AM	10:45 AM	WEST BRIGHTON
SI	INV	000116	000116	2 MRC	000008-1	TOMYJM	Thai Food Restaurant	000008	1/28/2023	2:00 PM	3:00 PM	WEST BRIGHTON



# Lesson 21: Processing Quotes

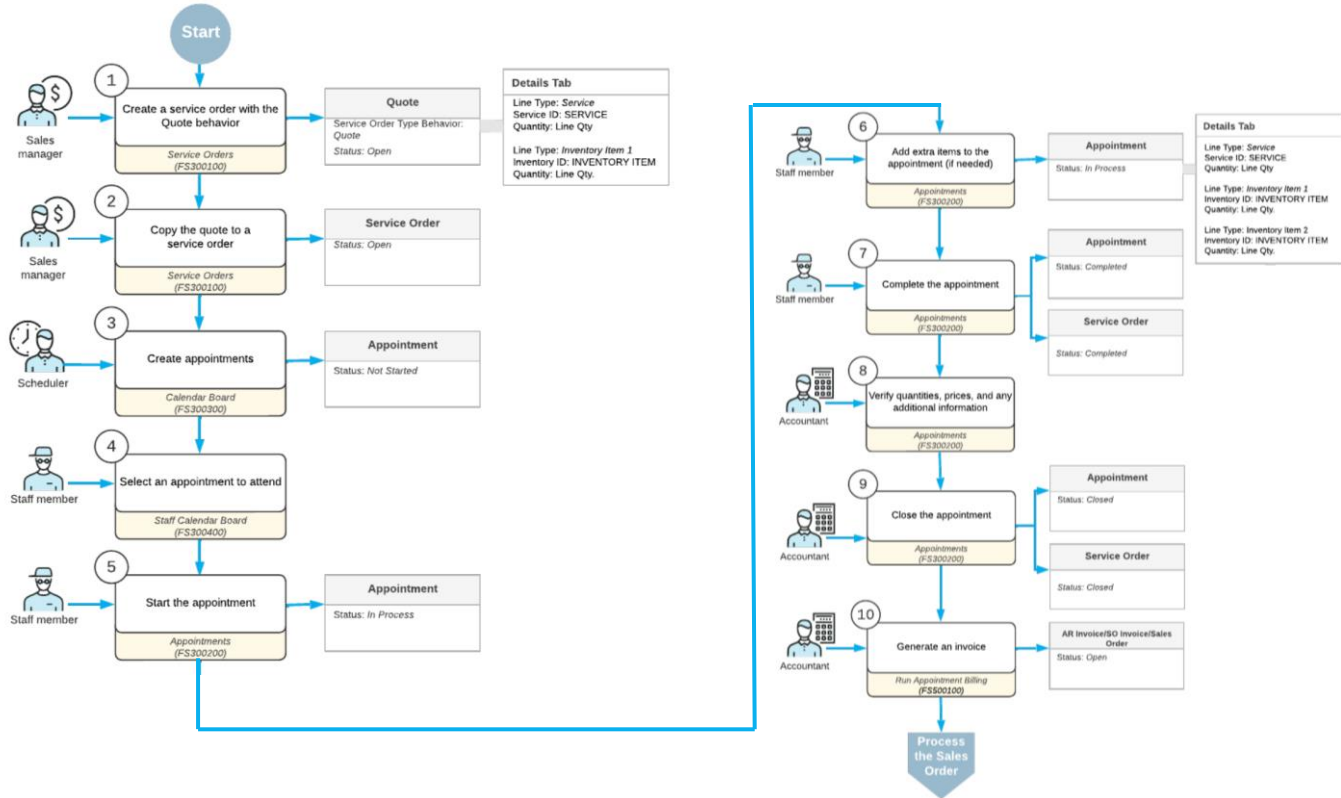
---

## Learning Objectives

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

- Create a quote
- Confirm the quote
- Copy the quote to a service order

# Figure: Quote processing



## Quote Processing: To Create and Process a Quote

---

Suppose that the COFFEESHOP - FourStar Coffee & Sweets Shop customer has requested particular services from the SweetLife Service and Equipment Sales Center. Acting as a service manager (Maia Davis) of the company, you will create a quote in the Acumatica ERP. Then you will generate the quote and review a printable version of it. Finally, after the customer has approved the quote, you will confirm the quote in the system and convert it to a service order.

# Figure: The service order total

Service Orders

QTE 000045 - FourStar Coffee & Sweets Shop

NOTES ACTIVITIES FILES TOOLS

CONFIRM

Order Type: QTE - Quotr Customer: COFFEESHOP - FourStar Coffee & Swex Estimated Duration: 1 h 00 m

Order Nbr.: 000045 Location: MAIN - Primary Location Estimated Billable Total: 3,080.00

Status: Open Branch Location: WEST BRIGHTON - Office in West Bri Estimated Tax Total: 0.00

Date: 1/30/2023 Project: X - Non-Project Code Estimated Total: 3,080.00

Customer Order: Invoice Total: 3,080.00

External Refer... Billing By:

Description: Repair of customer's equipment  Appointments Needed

SETTINGS DETAILS TAXES FINANCIAL PROFITABILITY ATTRIBUTES RELATED DOCUMENTS TOTALS OTHER


ADD ITEMS ADD STAFF CREATE EXPENSE RECEIPT CREATE AP BILL All Records

Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rule	Description	Staff Member ID	Warehouse	Location	UOM	Estimated Duration	Estimate Quantity	Unit Price	Manual Price
0001	Requiring Scheduli...	Service	REPAIR	Flat Rate	Repair of customer's equipment	<SPLIT>	EQUIPHOUSE	MAIN	HOUR	1 h 00 m	1.00	80.0000	<input type="checkbox"/>
0002	Requiring Scheduli...	Inventory Item	JUICER15	Flat Rate	Commercial juicer with a production rate of ...	<SPLIT>	EQUIPHOUSE	MAIN	PIECE	0 h 00 m	1.00	2,500.0000	<input type="checkbox"/>
0003	Requiring Scheduli...	Inventory Item	BLADE20	Flat Rate	Blade Holder V 2.0	<SPLIT>	EQUIPHOUSE	MAIN	PIECE	0 h 00 m	1.00	500.0000	<input checked="" type="checkbox"/>

# Figure: The print-friendly quote

Service Order TOOLS ▾

🔍 🔄 🖨️ 📧 🔑 ⏪ ⏩ PRINT SEND EXPORT ▾
Type your query here



Service and Equipment Sales Center  
219 Oakland Ave  
New York, NY, 10007  
Phone - +1 212 667 1506

### Quotes

Service Order No.: 000052  
Status: Open  
Order Date: 13/02/23  
Customer ID: COFFEESHOP  
Currency: USD

**BILL TO:**  
Customer: COFFEESHOP - FourStar Coffee & Sweets Shop  
Location: MAIN - Primary Location

**APPOINTMENT ADDRESS:**  
1167 Williams Avenue, Brooklyn  
New York NY 11235  
United States of America

**MAIN CUSTOMER CONTACT:**  
Email: salesperson@fourstars.example.com  
Phone: +1 212 555-8105

**SERVICE ORDER DETAILS:**  
Project: X - Non-Project Code.

**PROBLEM DETAILS:**  
Severity: Medium  
Priority: Medium

SERVICES		TARGET EQ.	BILLING R.	QTY.	PRICE	DISC.	TRAN. AMOUNT
NO.	ITEM		Flat Rate			0%	00.00
0001	REPAIR - Repair of customer's equipment						

INVENTORY ITEMS		TARGET EQ.	WAREHS	QTY.	PRICE	DISC.	TRAN. AMOUNT
NO.	ITEM						
0002	JUCER15 - Commercial juicer with a production rate of 1.5 liters per minute		EQUIPHOUSE	1.00	2.500.0000	0%	2500.00
0003	BLADE23 - Blade Holder V 2.0		EQUIPHOUSE	1.00	500.0000	0%	500.00

STAFF MEMBER ID	DESCRIPTION	TYPE

APPOINTMENTS		
REF. NBR.	CONFIRMED STATUS	SCHEDULED DATE

# Figure: The service order based on the quote

Service Orders

MRO 000046 - FourStar Coffee & Sweets Shop

NOTES ACTIVITIES FILES TOOLS

← ↻ + 🗑️ 📄 K < > >| COMPLETE QUICK PROCESS **CREATE APPOINTMENT** ...

• Order Type: MRO - Main    Customer: COFFEESHOP - FourStar Coffee & Sweets    Estimated Duration: 1 h 00 m

Order Nbr.: 000046    • Location: MAIN - Primary Location    Estimated Billable Total: 3,080.00

Status: **Open**    • Branch Location: WEST BRIGHTON - Office in West Bri    Estimated Tax Total: 0.00

• Date: 1/30/2023    • Project: X - Non-Project Code    Estimated Total: 3,080.00

Customer Order:    Invoice Total: 3,080.00

External Refer...    Billing By: Service Orde...

Description: Repair of customer's equipment     Waiting for Purchased Items

Appointments Needed

SETTINGS DETAILS TAXES APPOINTMENTS FINANCIAL PROFITABILITY DEFAULT STAFF DEFAULT RESOURCE EQUIPMENT ATTRIBUTES PREPAYMENTS TOTALS

🔄 + ✎ ✕ ADD ITEMS ADD STAFF LINE DETAILS CREATE EXPENSE RECEIPT CREATE AP BILL 📄 📄 All Records

Ref. Nbr.	Line Status	Line Type	Inventory ID	Billing Rule	Description	Staff Member ID	Warehouse	Location	UOM	Estimated Duration	Estimate Quantity	Unit Price
0001	Requiring Scheduling	Service	REPAIR	Flat Rate	Repair of customer's equipment	<SPLIT>	EQUIPHOUSE	MAIN	HOUR	1 h 00 m	1.00	80.0000
0002	Requiring Scheduling	Inventory Item	JUICER15	Flat Rate	Commercial juicer with a production rate of ...	<SPLIT>	EQUIPHOUSE	MAIN	PIECE	0 h 00 m	1.00	2,500.0000
0003	Requiring Scheduling	Inventory Item	BLADE20	Flat Rate	Blade Holder V 2.0	<SPLIT>	EQUIPHOUSE	MAIN	PIECE	0 h 00 m	1.00	500.0000

# Lesson 22: Processing Appointments in the Mobile App

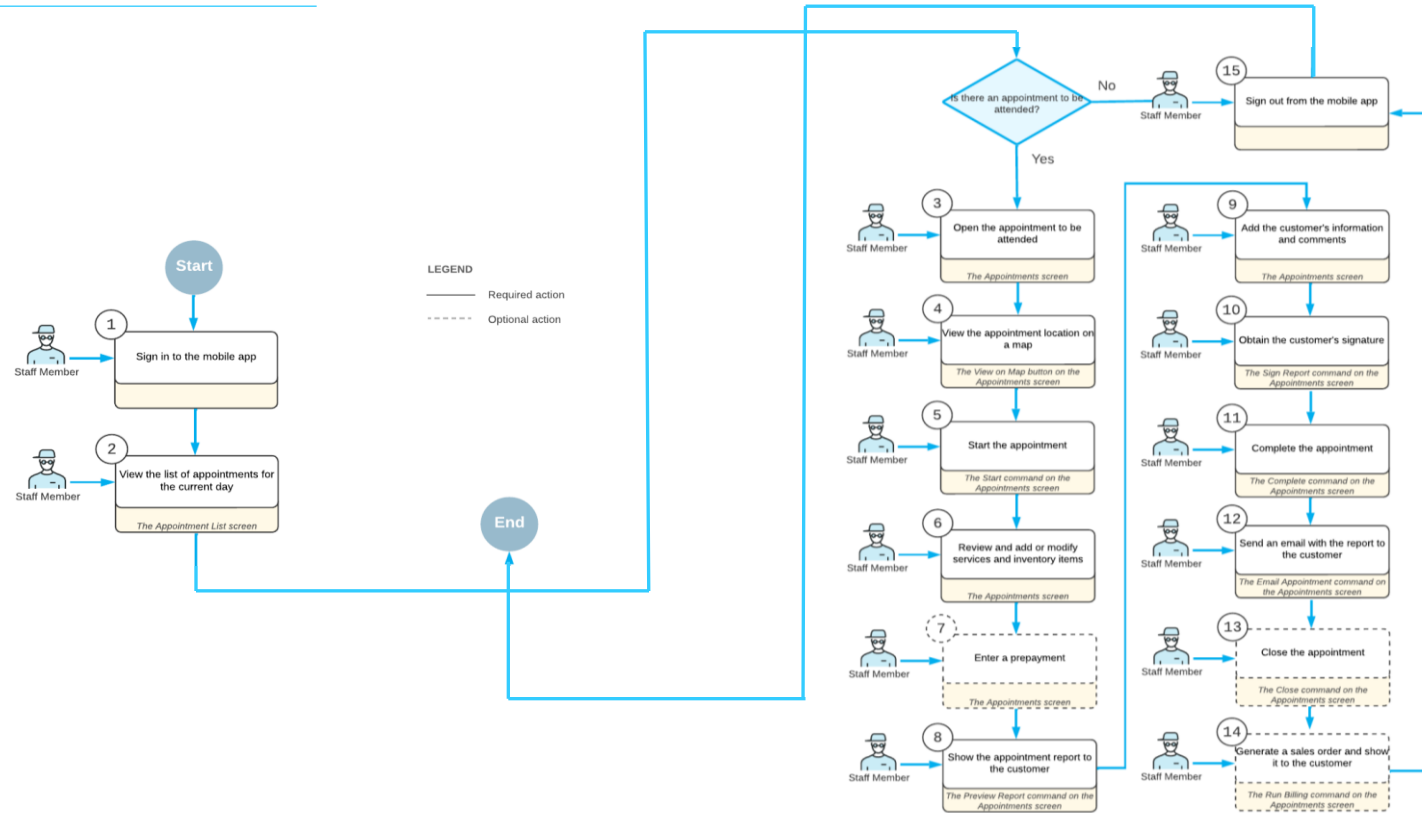
---

## Learning Objectives

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

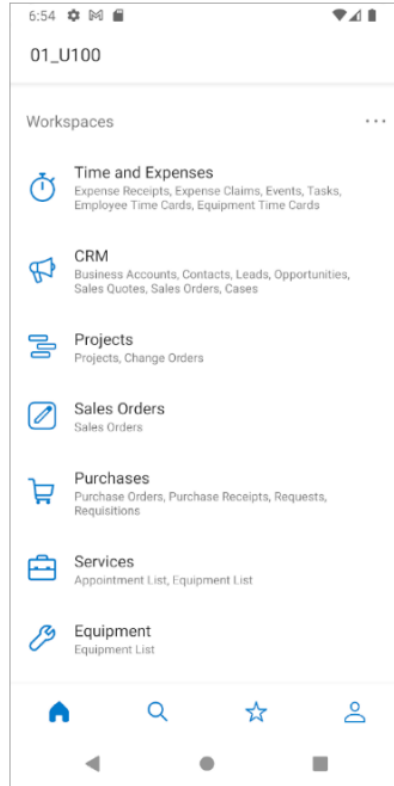
- View and filter the appointments assigned to a staff member
- Start the appointment and add an additional item to the Details tab
- Obtain the customer's signature and complete the appointment

# Figure: Appointment processing in the mobile app



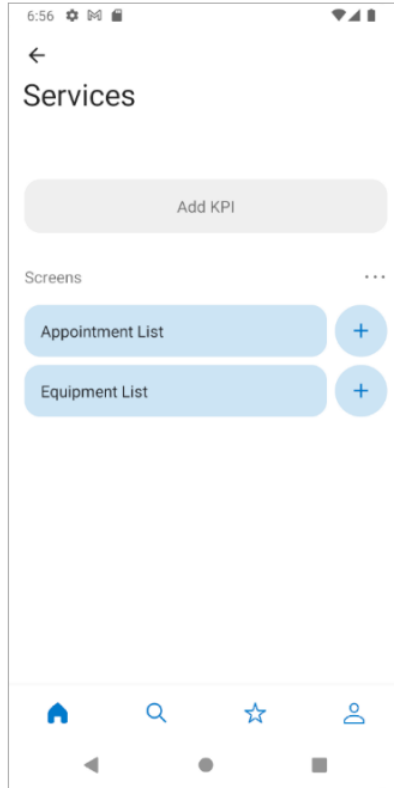


# Figure: The list of workspaces on the main menu of the mobile app

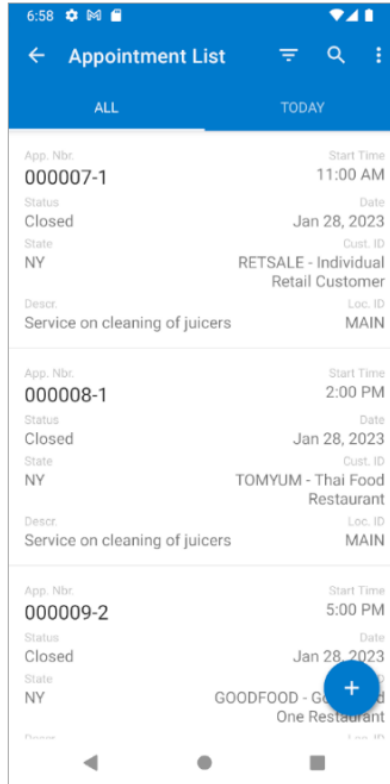


## Figure: The list of screens in the Services workspace

---



# Figure: The list of appointments on the Appointment List screen



The screenshot shows a mobile application interface for an 'Appointment List'. The top navigation bar is blue with a back arrow, the title 'Appointment List', a filter icon, a search icon, and a menu icon. Below the navigation bar are two tabs: 'ALL' (selected) and 'TODAY'. The main content area displays a list of three appointment entries, each with a white background and a thin border. Each entry contains the following information:

App. Nbr.	Start Time
000007-1	11:00 AM
Closed	Jan 28, 2023
NY	RETSALE - Individual Retail Customer
Service on cleaning of juicers	MAIN
000008-1	2:00 PM
Closed	Jan 28, 2023
NY	TOMYUM - Thai Food Restaurant
Service on cleaning of juicers	MAIN
000009-2	5:00 PM
Closed	Jan 28, 2023
NY	GOODFOOD - Good One Restaurant

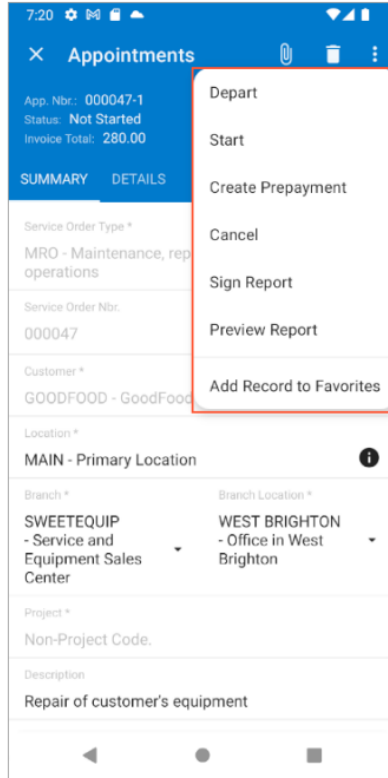
A blue circular button with a white plus sign is overlaid on the right side of the third appointment entry. The bottom of the screen shows the standard Android navigation bar with back, home, and recent apps icons.

# Figure: Search results

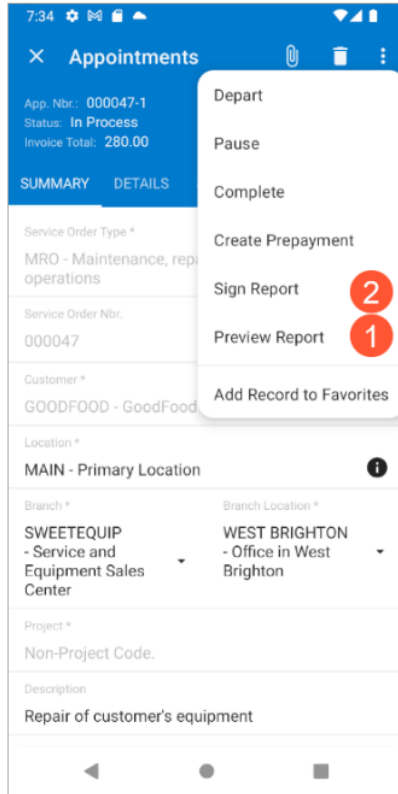
The screenshot shows a mobile application interface with a search bar at the top containing the text 'Goodfood'. Below the search bar are two tabs: 'ALL' and 'TODAY'. The search results are displayed in a list format, showing three entries. Each entry includes fields for App. Nbr., Start Time, Status, Date, State, Cust. ID, Descr., and Loc. ID. The 'Cust. ID' field is highlighted in blue for each entry.

App. Nbr.	Start Time	Status	Date	State	Cust. ID	Descr.	Loc. ID
000009-2	5:00 PM	Closed	Jan 28, 2023	NY	GOODFOOD - GoodFood One Restaurant	Training on juicer usage (at customer's place)	MAIN
000046-1	9:00 AM	Billed	Jan 31, 2023	NY	GOODFOOD - GoodFood One Restaurant	Training on juicer usage (at customer's place)	MAIN
000045-1	2:00 PM	Billed	Jan 31, 2023	NY	GOODFOOD - GoodFood One Restaurant	Training on juicer usage (at customer's place)	MAIN

# Figure: Appointment commands



## Figure: The Preview Report and Sign Report commands on the More menu



## Figure: The signature screen

---



# Figure: The signed report





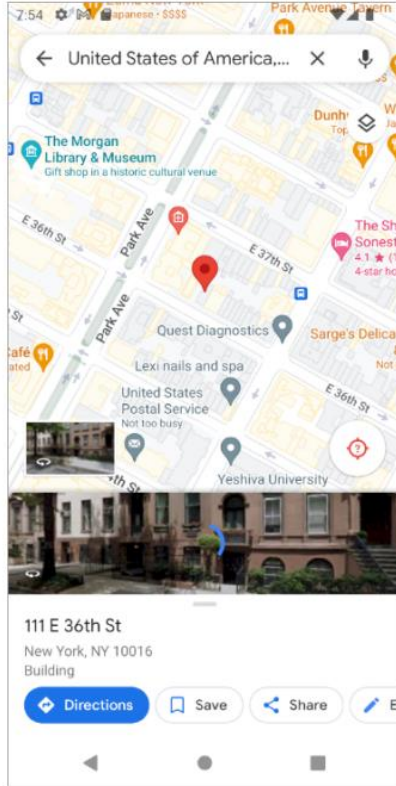
## Appointments in the Mobile App: To Process an Appointment Assigned to a Staff Member

---

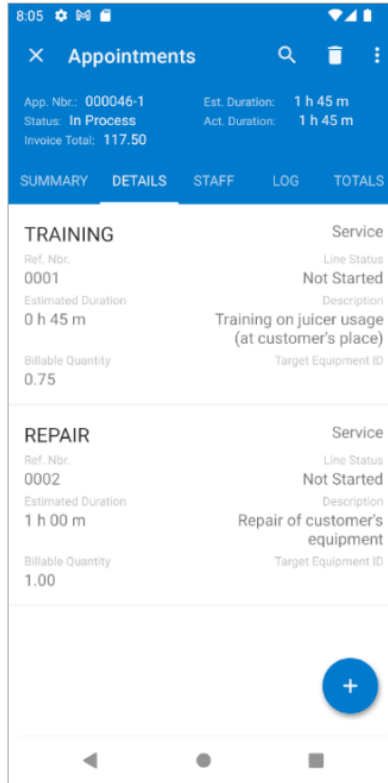
Suppose that Alberto Jimenez uses the Acumatica mobile app to process the appointments that he attends. On January 31, 2023, he will arrive to the appointment location and process the appointment by using the mobile app. That is, he will start the appointment in the mobile app, add one more service to the appointment, and show the appointment report to the customer. The customer will sign the appointment in the app. Alberto Jimenez will then complete the appointment, send the signed appointment to the customer. Acting as Alberto Jimenez, you will perform these actions in the mobile app.

# Figure: View on Map

---



# Figure: The additional REPAIR service has been added to the appointment



# Figure: Preview Report

**SweetLife**  
 Service and Equipment Sales Center  
 274 Cabernet Ave  
 West York, PA 17360  
 Phone: +1 717 867 1936

**Customer Training**

Appointment No: 000001  
 Sales: 0.0000  
 Sales Tax Code: 000000  
 App Date: 1/15/2025  
 Customer ID: 00000000  
 Company: 000

**TRA No:**  
 Customer: 00000000 - GoodFood One Restaurant  
 Location: 0000 - Primary Location

**APPOINTMENT DETAILS:**  
 131 E. 9th St  
 West York, PA 17360  
 United States of America

**MAIN CUSTOMER CONTACT:**  
 Email: goodfoodone@comcast.net  
 Phone: +1 717 867 1936

**APPOINTMENT DETAILS:**  
 Contact: A. SweetLife 0000  
 Appointment Date: 1/15/2025 10:00 AM  
 Scheduled Date: 1/15/2025 10:00 AM  
 Appointment Type: 00000000 1/15/2025 AM  
 Appointment Time:

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TAX	DISC	NET PRICE	AMOUNT
001	Training	Training on point-of-sale	1.00	0.00	0.00	1.00	0.00
002	Training	Training on inventory	1.00	0.00	0.00	1.00	0.00
003	Training	Training on supplier's equipment	1.00	0.00	0.00	1.00	0.00

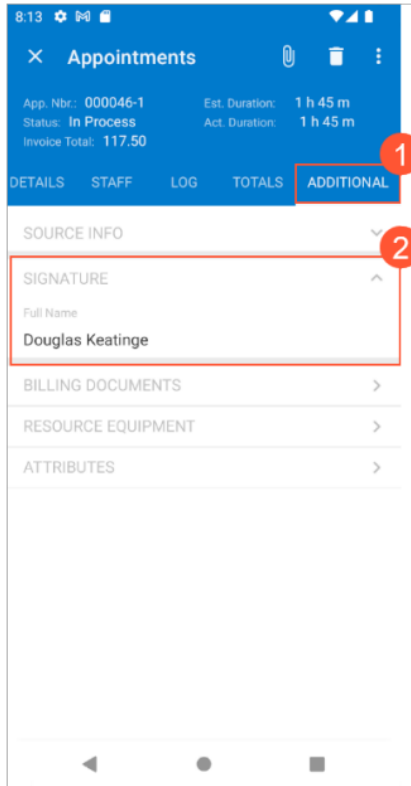
**CHARGE SUMMARY:**

CHARGE NUMBER	DESCRIPTION	TAX
00000000	0000-00000	0.00

Appointments Total (GROSS) 1.00  
 Less Discount 0.00  
 Net Total 1.00  
 Total (GROSS) 1.00

Page: 1 of 1

# Figure: Additional tab and Signature section

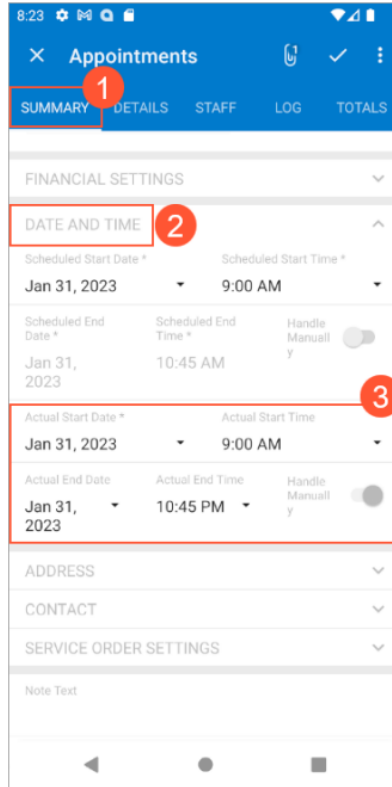


## Figure: Sign Report

---



# Figure: Summary tab



# Figure: Select Finished

The screenshot displays a mobile application interface for managing appointments. At the top, the status is 'In Process' and the invoice total is 117.50. The 'Finished' toggle switch is currently turned off. A red box highlights the 'Finished' label and the toggle switch, indicating the action to be taken.

8:34

Appointments

App. Nbr.: 000046-1 Est. Duration: 1 h 45 m  
Status: In Process Act. Duration: 1 h 45 m  
Invoice Total: 117.50

SUMMARY DETAILS STAFF LOG TOTALS

Service Order Type \*  
TRN - Customer Training Services [VIEW ON MAP](#)

Service Order Nbr.  
000046 **Finished**

Customer \*  
GOODFOOD - GoodFood One Restaurant

Location \*  
MAIN - Primary Location

Branch \*  
SWEETEQUIP - Service and Equipment Sales Center

Branch Location \*  
WEST BRIGHTON - Office in West Brighton

Project \*  
Non-Project Code.

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





Thank you!

Valentina Diaz