Microsoft Dynamics®

Business Portal for Microsoft Dynamics® GP 2010

Field Service Suite

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Contents

Introduction

Welcome to Field Service Suite, a component of Business Portal for Microsoft Dynamics® GP. Using Field Service Suite, you can:

- Create, modify, and view service calls
- Enter and track meter readings
- Create, modify, and view return merchandise authorizations (RMAs)

Any service calls or RMAs entered via the Field Service Suite are automatically updated to Microsoft Dynamics GP for processing. Additionally, service call and RMA entry is more efficient and accurate, as address and contact information is automatically supplied based on company data and mappings.

This guide contains information for system administrators to:

- Set up users for Field Service Suite
- Provide access to Field Service Suite
- Manage site settings for Field Service Suite

This guide also contains information for users to:

- Enter, view and modify service calls
- Enter, view and modify RMAs
- Enter, view and modify meter readings

Field Service Suite is an extension of the service call and RMA functionality found in Microsoft Dynamics GP. This guide occasionally references settings and functionality within Microsoft Dynamics GP. Therefore, you should be familiar with the Microsoft Dynamics GP Field Service Series before attempting to use Field Service Suite. Refer to the appropriate Microsoft Dynamics GP user guides for assistance with any functionality not explicitly described in this document.

Check for updated instructions

This information was current as of March 10, 2010. The documentation may be updated as new information becomes available. Check the Microsoft Dynamics GP documentation web site (http://go.microsoft.com/fwlink/?LinkId=185513) for the most current documentation.

This introduction is divided into the following sections:

- *What's in this manual*
- *Symbols and conventions*
- *Additional resources*
- *Send us your documentation comments*

What's in this manual

This manual includes the following chapters:

- Chapter 1, "Installation and setup," explains how to install and set up Field Service Suite.
- Chapter 2, "Service calls," explains how to navigate the Field Service Suite application and perform daily activities relating to service call and meter reading functionality.
- Chapter 3, "RMAs," explains how to navigate the Field Service Suite application and perform daily activities relating to RMA functionality.

Symbols and conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Business Portal or the back office may be affected.

This manual uses the following conventions to refer to sections, navigation, and other information.

Convention	Description
Saving favorite queries	Italicized type indicates the name of a section or procedure.
File > **Print**	The (>) symbol indicates a sequence of actions, such as choosing items from a menu or toolbar or clicking buttons in a window. This example directs you to go to the **File** menu and click **Print**.
Bold	Bold type indicates navigation, tab names, menus, commands, buttons, field names, keywords, and functions.
TAB or ENTER	Small capital letters indicate a key or a key sequence.

Additional resources

In addition to this manual, the following documentation is included with this release of Business Portal.

Manuals

The following PDF manuals are included in the Documentation folder on the Business Portal media.

Business Portal Installation Guide The Installation Guide (BusinessPortalInstallation.pdf) provides step-by-step instructions for installing Business Portal.

Business Portal Administrator's Guide The Administrator's Guide (BusinessPortalAdminGuide.pdf) explains how to set up and configure Business Portal.

Application manuals User and Administrator manuals for each application installed in Business Portal are available in the Documentation folder.

Help

Help is available by clicking the Help icon button, located in the upper-right corner of any page. The help that is displayed depends on whether you open help from a Business Portal page, a Microsoft® Windows SharePoint® Services page, or a Microsoft Office SharePoint Server 2007 page or Microsoft SharePoint Server 2010 page.

Business Portal help When you click the Help icon button on a Business Portal page, the relevant help topic for that page is displayed. You can use the search field on the help page to search for information. You also can click the Home icon button to browse the contents of the help.

SharePoint help Many of the features included in Business Portal—such as document libraries, lists, announcements, links, and alerts—are provided by Windows SharePoint Services. General information about these features is provided in the Administering Business Portal help. For more detailed information, refer to the Windows SharePoint Services help, which can be accessed by clicking the Help icon button in the upper-right corner of any Windows SharePoint Services page. If you're using Office SharePoint Server 2007 or Microsoft SharePoint Server 2010, additional help related to the SharePoint Server features also will be available.

Send us your documentation comments

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: bizdoc@microsoft.com.

Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.

Chapter 1: Installation and setup

The following information explains how to install the software and perform setup tasks prior to using it in your organization.

The following sections are included:

Installation preparation

Business Portal must be installed and configured for your environment prior to the installation of the Field Service Suite. Additionally, the Field Service Suite is available only if you are installing on Microsoft Office SharePoint Server, Enterprise Edition.

Intranet vs. Extranet deployment

Business Portal can be deployed in an intranet or extranet environment. The environment chosen determines who is able to use the Field Service Suite.

Intranet An intranet is a company's internal network. When you deploy Business Portal in an intranet environment, only internal users are able to manage service calls and/or RMAs in the Field Service Suite.

Extranet An extranet is an extension of a company's intranet that provides limited access to authorized outside users. When you deploy Business Portal in an extranet environment, both your external users (customers) and internal users are able to manage service calls and/or RMAs in the Field Service Suite.

If you decide to deploy Business Portal in your intranet, you can add external access at a later time.

For information about setting up intranet and extranet environments, see the Business Portal Installation Guide.

Before starting the Field Service Suite, refer to the Business Portal Administrator's Guide for important information about user security setup. These mappings are vital to the success of the Field Service Suite.

Microsoft Dynamics GP modules required

Before installing the Field Service Suite, verify that the following Microsoft Dynamics GP Field Service modules are registered and set up:

- Service Call Management
- Returns Management

For more information about these modules, refer to the Microsoft Dynamics GP Field Service documentation.

Access rights required

To install the Field Service Suite, you must log on to the Business Portal Web server as a user with the correct access rights. Specifically, you must be a member of the Administrators group in SharePoint, Microsoft SQL Server®, and Web Services.

Microsoft Office SharePoint Server setup

If you're going to install the advanced version of Office SharePoint Server, you must first create domain user accounts that SharePoint can use to launch services, run processes, and connect to the SQL Server.

You don't need to create these accounts if you're going to use the basic installation method for Office SharePoint Server. The following user accounts for Office SharePoint Server should be created:

- A domain user account that acts as the application pool identity for the Web application where you will create the Business Portal site collection. We recommend creating an account called oss_user. This user account must be a member of the IIS Worker Process (IIS_WPG) group on the web server, and the account must be dedicated (used only by SharePoint). If you're installing on multiple web servers, the account must be a Business Portal user.

- A domain user account under which the Office SharePoint Server Search service can run. The user account must be a member of the Administrators group on the computer that is running the Search service.

- A domain user account that is used to crawl content on your sites and create indexes.

- A domain user account that acts as the identity for the SharePoint Central Administration application pool. The Windows SharePoint Services Timer service also runs under this account.

- A domain user account that acts as the application pool identity for the web application where you will create the Shared Services Provider (SSP).

- A domain user account under which the SSP runs.

Additional information concerning the configuration of Office SharePoint Server can be found in the Business Portal Installation Guide.

SQL Server setup

During the Business Portal installation, you'll need to enter the following SQL Server logon IDs:

- The SQL Server administrator logon ID—entered in the Connection Information window if you choose to use SQL authentication—can be any SQL logon ID that has administrator privileges with access to all Microsoft Dynamics GP SQL databases. You can use the sa logon, but are not required to do so. These credentials are used only during the Business Portal installation process, to permit the installation wizard to create the Business Portal logon ID. The SQL Server administrator credentials are not used again.

- The Business Portal logon ID—entered in the Business Portal SQL Configuration window—is the logon account Business Portal uses to access data in SQL Server. This logon ID is used continually to access Microsoft Dynamics GP data. The default entry in the Business Portal SQL Configuration window is BusinessPortalUser. However, you can also use an existing SQL user or create your own SQL user. If you enter a nonexistent SQL logon in the window, that user will be created automatically in SQL Server during the Business Portal installation. If you're installing Business Portal on multiple web servers, be sure that the same Business Portal logon ID and password are used for all web servers.

Additional information concerning SQL configuration can be found in the Business Portal Installation Guide.

Field Service Suite installation

If you did not install Field Service Suite when running the Business Portal installation wizard, use the setup wizard to add it to your Business Portal installation. For additional information regarding setup, refer to the Business Portal Installation Guide.

1. From the Business Portal installation media, double-click the **CDSetup.exe** file.
2. Under **Install**, click **Business Portal for Microsoft Dynamics GP**.
3. The End-User License Agreement window appears. Read and accept the terms in the License Agreement, and click **Next**.
4. The Connection Information window appears. Enter the location of your Microsoft Dynamics GP SQL Server database, and select the type of authentication that should be used when creating objects used by Business Portal. Further information on this step can be found in the Business Portal Installation guide.
5. The Select Features window appears. Select the Field Service Suite module to be installed.
6. The Ready to Install window appears. Click **Install**. The installation process may take several minutes to complete.
7. The Finish window appears. Click **Finish**.
8. We recommend creating a backup of the Web.config file after installing Business Portal applications. The Web.config file is located at C:\inetpub\wwwroot\wss\VirtualDirectories\<*port number*>, where <*port number*> is the port number of the IIS web site where you installed Business Portal.

Windows SharePoint Services setup

SharePoint groups are used to grant access to Business Portal sites, document libraries, and pages. When you log on to the Business Portal, menu options and Quick Launch items appear based on the SharePoint groups you belong to.

For additional information about managing groups, see the Windows SharePoint Services Administrator's Guide.

1. From the **Site Actions** menu on any Business Portal page, choose **Site Settings**.
2. Under **Users and Permissions**, click **People and Groups**. Click **Groups** in the Quick Launch to display all groups.
3. Click the name of the group that you want to add users to. Choose **New > Add Users**.
    - To access RMA information, select the **Business Portal Return Customer** group.
    - To access service call information, select the **Business Portal Service Customer** group.
4. Follow the instructions on the page to enter user names and select permissions. Additionally, you may reference Add Users to SharePoint Groups the Business Portal Administrator's Guide for in depth steps on assigning users to a SharePoint group.
5. Click **OK** to save your changes.

Domain user setup

A domain user must be set up in Business Portal prior to completing the mappings in the Field Service Suite.

1. Open the Dynamics Security Console. (On a computer where the console is installed, choose **Start > Administrative Tools > Dynamics Security Console**.)
2. Select the **Role Assignments** node in the left pane of the Dynamics Security Console.
3. In the **Action** menu, click **Add**. The Add Role Assignments window appears.
4. In the **Role** list, select the role that you want to assign users or groups to:
    - For RMA information, select the role of **Returns Customer - Self**.
    - For service call information, select the role of **Service Customer - Self**.
5. Click **Add Windows Users** to add individual windows users to the role assignment. Click **Add Groups** to add application level groups or enterprise level groups to the role assignment.

Roles are important because they dictate what pages and information you are able to view. These roles determine how much or how little access a user has, including the determination of read/write permission

Entity ID assignment

Assigning the entity ID in the Dynamics Security Console associates the user with the appropriate back office customer. The Business Portal Administrator's Guide contains additional information about this task.

1. Open the Dynamics Security Console. (On a computer where the console is installed, choose **Start > Administrative Tools > Dynamics Security Console**.)
2. Select the **Entity ID Assignments** node in the left pane of the Dynamics Security Console.
3. In the **Action** menu, click **Add**. The Add Entity ID Assignments window appears.
4. Click **Select Windows User** to select the user you would like to assign to a back office entity.
5. In the **Entity Type** list, select the entity type you would like to assign to the user. For Service Center, the entity type is **customer**.
6. In the **Company** list, select the company where the entity exists. A list of entity IDs for the selected entity type and company appears.
7. In the **Entity** list, select the ID you would like to assign to the user.
8. Click **OK** to save the new assignment.

Roles and permissions

In Business Portal, the following groups should be considered:

- Business Portal Return Customer Group
- Business Portal Service Customer Group

The Business Portal Return Customer Group allows you to access the RMA Documents in the control panel in the Business Administration portal. The Business Portal Service Customer Group allows you to access the service calls and meter readings entry in the Quick Launch.

In the Dynamics Security Console, the following roles and permissions should be considered:

- Return Customer Role
- Service Customer Role

Additionally, the following settings should be considered when setting up the Entity ID:

- Type: Customer
- Company: Corresponding company name

These settings allow you to be set up in association with the appropriate company and, in turn, the correct company data. This is important because the address, contact name, and equipment information is all driven from the company that is selected and associated to your ID.

Chapter 2: Service calls

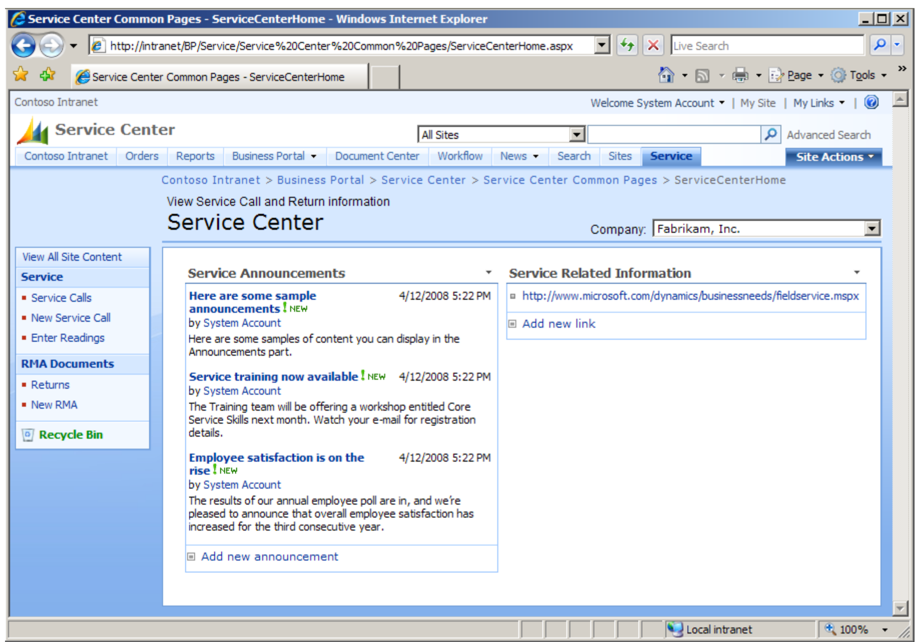
This part of the documentation explains how to navigate the Field Service Suite application and perform daily activities relating to service call and meter reading functionality.

The following topics are discussed:

- *Enter a new service call*
- *View existing service calls*
- *Enter meter readings*

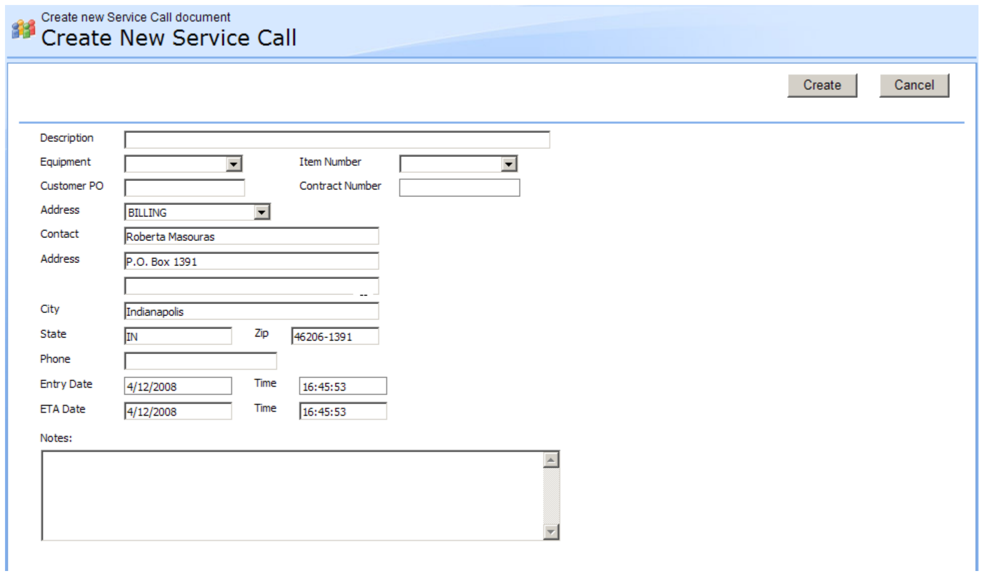
Service Center home page

In Business Portal, click the **Service** tab to display the Service Center home page. You can access all the Field Service Suite functionality from this page.



Enter a new service call

To enter a new service call, click the **New Service Call** link on the Service Center Quick Launch.



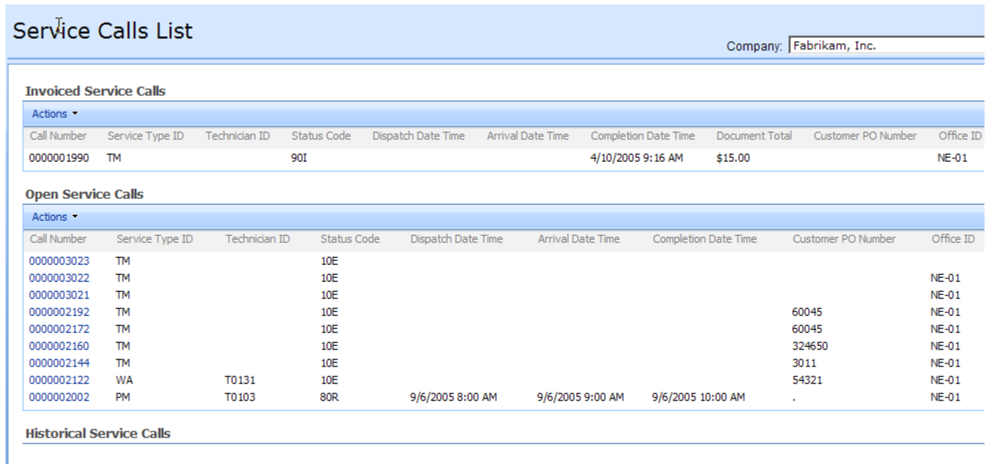
Address and contact information is automatically provided, based on the company information that is loaded during the entity ID assignment, and these fields are required for submission.

Once you have filled out the document, click **Create** to submit it. The View Service Call Details window appears with the assigned service call number and a call status. The call has now been created in Microsoft Dynamics GP, and can be recalled by using the assigned service call number.

By clicking **OK**, you can view the newly created service call under Open Service Calls. This view can also be accessed by clicking the corresponding hyperlinks in the Service Center Quick Launch.

View existing service calls

To view existing service calls, click the **Service Call** link or **Service** link in the Service Center Quick Launch. The Service Calls List page displays all invoiced, open, and historical service calls.



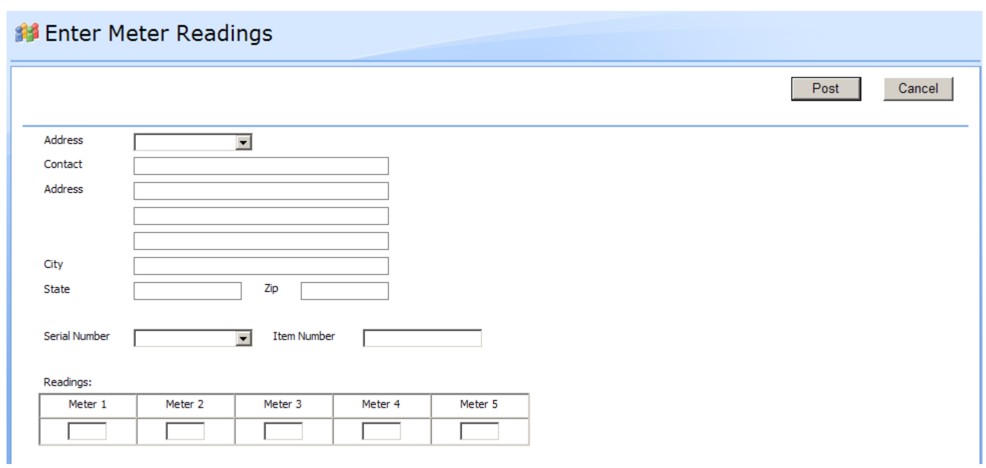
Call Number	Service Type ID	Technician ID	Status Code	Dispatch Date Time	Arrival Date Time	Completion Date Time	Document Total	Customer PO Number	Office ID
0000001990	TM		90I			4/10/2005 9:16 AM	$15.00		NE-01

Call Number	Service Type ID	Technician ID	Status Code	Dispatch Date Time	Arrival Date Time	Completion Date Time	Customer PO Number	Office ID
0000003023	TM		10E					
0000003022	TM		10E					NE-01
0000003021	TM		10E					NE-01
0000002192	TM		10E				60045	NE-01
0000002172	TM		10E				60045	NE-01
0000002160	TM		10E				324650	NE-01
0000002144	TM		10E				3011	NE-01
0000002122	WA	T0131	10E				54321	NE-01
0000002002	PM	T0103	80R	9/6/2005 8:00 AM	9/6/2005 9:00 AM	9/6/2005 10:00 AM	.	NE-01

Click a link corresponding to an open service call number to view additional details, such as equipment and company information.

Enter meter readings

To enter meter readings, click the **Enter Readings** link on the Service Center Quick Launch. The Enter Meter Readings window allows you to enter any meter reading information obtained from metered equipment.



Using the **Address** list, you can select from any available addresses that are stored in the system. Selecting an address automatically provides the **Contact**, **Address**, **City**, **State**, and **ZIP** information. Select the serial number for the metered part, and the **Item Number** field will display the corresponding item. Up to five meter readings may be entered for the equipment within one form. Click **Post** to post and update the readings in Microsoft Dynamics GP.

Chapter 3: RMAs

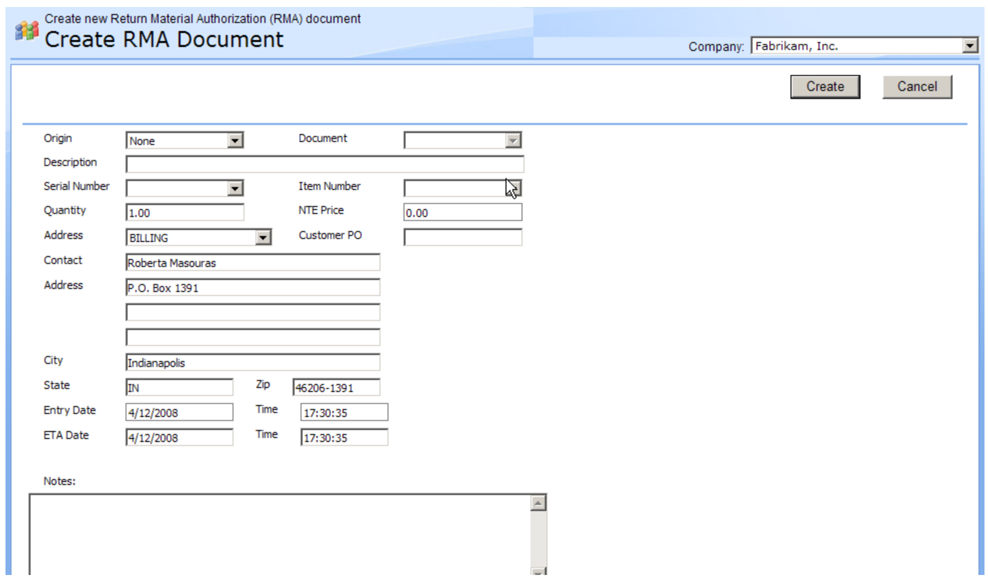
This part of the documentation explains how to navigate the Field Service Suite application and perform daily activities relating to RMA functionality.

The following topics are discussed:

- *Enter a new RMA*
- *View existing RMAs*

Enter a new RMA

To enter a new RMA, click the **New RMA** link on the Service Center Quick Launch.

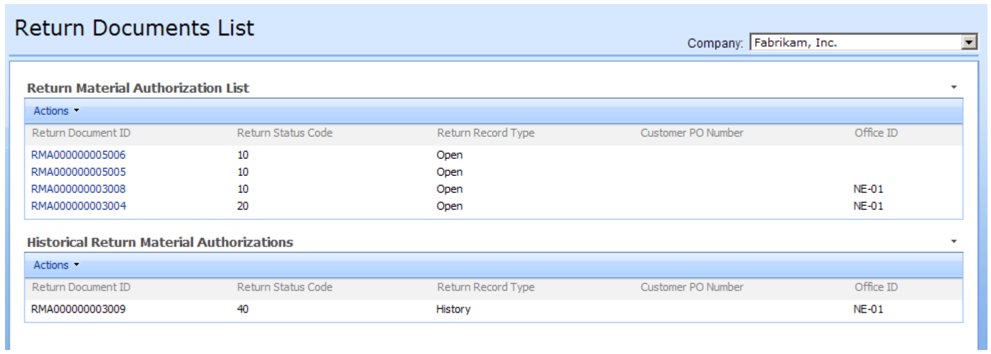


The address and contact information is provided based on the entity ID, and are required to create the RMA. Once you have filled out the document, click **Create**.

The Preview RMA Document window appears, and the RMA is assigned a number and a status. Once you click **OK**, you can view the newly created RMA from the list of RMAs. The RMA has also been created in Microsoft Dynamics GP and you can recall it there by using the assigned RMA number.

View existing RMAs

You can view existing RMAs by clicking the **Returns** or **RMA Documents** links on the Service Center Quick Launch.



On the Return Documents List page, click a link corresponding to an RMA number to view details such as additional equipment and company information.

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