



Microsoft Dynamics® GP
Field Service – Service Call Management

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Introduction

You can use Service Call Management to enter customer service requests, dispatch technicians, and manage parts, labor, and miscellaneous charges. You also can bill customers for time and material services.

By implementing Service Call Management with Contract Administration, service requests can contain specific billing and service terms as stated in your customer maintenance contracts. If Service Call Management is integrated with Preventive Maintenance, service calls can be automatically generated based on the time-in-service or use of a piece of equipment. You also can implement Service Call Management with Returns Management. By doing so, you can allow returnable parts from a service request to be seamlessly returned from the field technician into your returns warehouse. The process can improve your bottom line by capturing more warranty returns and lowering your cost of doing business.

This introduction is divided into the following sections:

- [What's in this manual](#)
- [Symbols and conventions](#)
- [Resources available from the Help menu](#)
- [Send us your documentation comments](#)

What's in this manual

This manual is designed to give you an understanding of how to use the features of Service Call Management and how it integrates with the Microsoft Dynamics® GP system.

To make best use of Service Call Management, you should be familiar with systemwide features described in the System User's Guide, the System Setup Guide, and the System Administrator's Guide.

Some features described in the documentation are optional and can be purchased through your Microsoft Dynamics GP partner.

To view information about the release of Microsoft Dynamics GP that you're using and which modules or features you are registered to use, choose **Help > About Microsoft Dynamics GP**.

The manual is divided into the following parts:

- [Part 1, Service Call Management setup](#), introduces Service Call Management and explains the setup of it.
- [Part 2, Transaction activity](#), explains how to enter and update service calls. It also explains how to dispatch technicians and produce service call billings.
- [Part 3, Inquiries and reports](#), explains how to use inquiries and reports to analyze your field service information.

Symbols and conventions

This manual uses the following symbols and conventions 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. |

| Convention | Description |
|-------------------------|---|
| <i>Creating a batch</i> | Italicized type indicates the name of a section or procedure. |
| File > Print | The(>) symbol indicates a sequence of actions, such as selecting items from a menu or a toolbar or pressing buttons in a window. This example directs you to go to the File menu and select Print . |
| TAB or ENTER | Small capital letters indicate a key or a key sequence. |

Resources available from the Help menu

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web.

Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main “contents” topic. To browse a more detailed table of contents, click the **Contents** tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an “Additional Help files” topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the **Favorites** tab. Click **Add**.

Index

Opens the Help file for the active Microsoft Dynamics GP component, with the **Index** tab active. To find information about a window that’s not currently displayed, type the name of the window, and click **Display**.

About this window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press **F1** to display Help about the current window.

Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

Show Required Fields

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. You can change the font color and style used to highlight required fields. On the **Microsoft Dynamics GP** menu, choose **User Preferences**, and then choose **Display**.

Printable Manuals

Displays a list of manuals in Adobe Acrobat.pdf format, which you can print or view.

What's New

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

Microsoft Dynamics GP Online

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

Customer Feedback Options

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft® software and services.

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.

To send comments about specific topics from within Help, click the **Documentation Feedback** link, which is located at the bottom of each Help topic.

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

Part 1: Service Call Management setup

You can set up Service Call Management to fit the needs of your business. Setup procedures generally need to be completed only once, but you may want to refer to this information at other times for instructions on modifying or viewing existing entries.

The following topics are discussed:

- [Chapter 1, "Setup overview,"](#) describes how to use the Setup Checklist to assist in setting up Service Call Management.
- [Chapter 2, "Setup in Service Call Management,"](#) explains in more detail how to set up each document and item within Service Call Management.
- [Chapter 3, "Set up the SQL Mail Process Server,"](#) explains how to set up the SQL Mail Process Server within Service Call Management.

Chapter 1: Setup overview

The setup procedures are organized in an order that ensures proper setup.

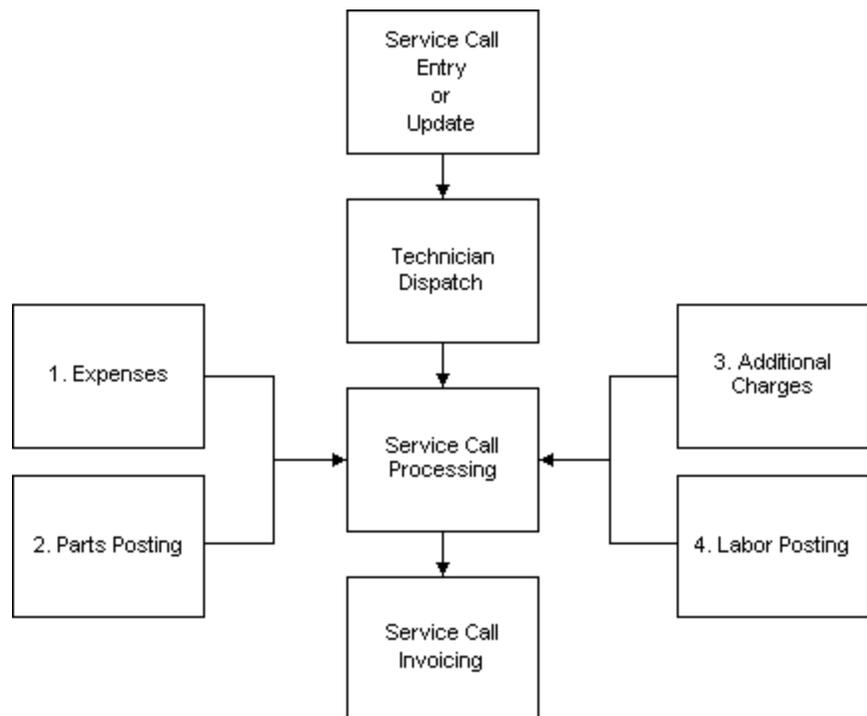
This information is divided into the following topics:

- [Service Call Management life cycle](#)
- [Service Call Management document types](#)
- [Before setting up Service Call Management](#)
- [Use the Setup Checklist](#)

Service Call Management life cycle

As a service company, your customers place calls to you requesting a technician be sent to repair a piece of equipment. You dispatch a technician, who repairs the equipment and consumes some part of your inventory in the process. Once the call is completed, you can send the customer an invoice for the service request.

The following diagram outlines the life cycle of service calls, from entry through invoicing. When Service Call Management is integrated with the other modules of the Field Service Series (Preventive Maintenance, Returns Management, Contract Administration, and Depot Management), many new options and paths become available.



You can create service calls from different areas throughout the Field Service Series.

- Manual entry in the Service Call Entry/Update window
- Generated documents from Engineered Change Orders (ECOs)
- Generated documents from Preventive Maintenance (PM) schedules
- Phone calls taken through the Call Center window

Five of the access points are found within Service Call Management.

- Manual
- E-mail
- ECO generation
- Call Center
- Preventive maintenance generation



Preventive Maintenance generation is not included in this documentation. For more information, see the Preventive Maintenance documentation.

During the entry or update of service calls, you can add items to service calls as parts, labor, expenses, and additional charges. Technicians also can be assigned at this time. Once the service call is ready for a field agent to visit the customer, the technician can be dispatched. After the service call is completed, you can process the call and assess the total price of the service call including parts, labor, expenses, and additional charges. Once the total is calculated, you can invoice the customer.

Service Call Management document types

Use Service Call Management to enter, update, and print service call documents. You also can transfer service call documents from one record type to another. You can set up the following types of documents within Service Call Management:

Quote A quote is a document that can be provided if a customer requests a price quote for services. A customer may ask for a price quote prior to initiating a service call. In that case, you can create a quote and then transfer the quote to an open service call once the customer has agreed to proceed.

Open Service Call An open service call is a “live” document used to track information about equipment serviced for a customer. The service call provides details about the service work performed, including charges for parts, labor, additional charges, and expenses.

Before setting up Service Call Management

Before setting up Service Call Management, complete the setup procedures for Sales Order Processing, Receivables Management, Inventory Control, and General Ledger, including the following tasks:

- Create general ledger accounts for parts sales, parts cost of goods sold, labor sales, additional charge sales, expenses incurred, and sales returns.
- Enter inventory cards for items that will be serviced.
- Create your invoice and return document types in Sales Order Processing.

For more information, see the General Ledger, Receivables Management, Sales Order Processing, and Inventory Control documentation.

If you’re using Service Call Management with Multicurrency Management, be sure you’ve also set up currencies, exchange rate tables, and Multicurrency default entries. For more information, see the Multicurrency Management documentation.

Use the Setup Checklist

When you set up Service Call Management, either open each setup window and enter information, or use the Setup Checklist window (**Microsoft Dynamics GP menu > Tools > Setup > Setup Checklist**) as a guide. See the System Setup Guide (**Help > Printable Manuals**) for more information.

Chapter 2: Setup in Service Call Management

Service Call setup involves setting up your Service Call Management preferences such as data entry defaults, technician assignment settings, call status defaults, and service call entry options.

When you set up Service Call Management, you can open each window and enter information or you can follow the Setup Checklist, which you can use as a guide to the setup process. For more information, see [Use the Setup Checklist](#) on page 9.

This information is divided into the following topics:

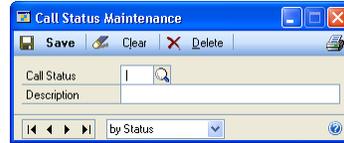
- [Set up call status codes](#)
- [Set up service types](#)
- [Miscellaneous charges for service calls](#)
- [Set up task codes](#)
- [Set up service codes](#)
- [Set up default service code tasks](#)
- [Set up service codes and tasks by service type](#)
- [Set up problem codes](#)
- [Set up cause codes](#)
- [Set up repair codes](#)
- [Set up tech status codes](#)
- [Set up equipment status codes](#)
- [Set up time zone codes](#)
- [Set up office location codes](#)
- [Set up service areas](#)
- [Set up technician records](#)
- [Set up default service call entries](#)
- [Non-inventoried items in the Field Service Series](#)
- [Set up default entries and options](#)
- [Set up Field Service and Payroll integration](#)
- [Set up permissions for SQL objects](#)
- [Set up default call status codes](#)
- [Set up schedule holiday templates](#)
- [Set up user-defined fields](#)
- [Set up service document security](#)
- [Set up warranties](#)
- [Set up customer extensions](#)
- [Set up item extensions](#)
- [Set up item site extensions](#)
- [Set up equipment maintenance cards](#)
- [Set up item configurations](#)
- [Set up work types](#)
- [Set up miscellaneous addresses](#)
- [Set up engineered change orders](#)
- [Set up Extended Pricing](#)
- [Set up technician inventory item templates](#)

Set up call status codes

You can set up and customize an unlimited number of call statuses. Call statuses represent the life cycle of a service call from entry through invoicing. Create a call status code for each stage a service call might undergo (for example, 10E for an Entered status, 15C for a Credit Hold status, and so on).

When entering character ID status codes, remember that characters are sorted from left to right, and numbers take priority over letters.

1. Open the Call Status Maintenance window.
Cards > Service Call Management > Call Status



2. Enter a 3-character call status ID. Use numbers first, then letters, such as 10E or 32B.
3. Click **Save**.

Set up service types

You can customize an unlimited number of service types, which are codes used to categorize the service work your organization performs. The types contain many of the default entries for service calls, such as labor types and miscellaneous charges.



Changes made to existing service types affect only documents that are created using that service type in the future, not existing service calls.

You can charge different labor rates for each type of service your company offers.

When you enter the default labor items for the service type, entries for the specified Standard, Overtime, and Travel rates are made to the Service Call Entry – Labor window automatically. Double time and Hotline labor entries must be made manually.

You'll need to enter minimum values and rounding values for standard, travel, and hotline labor items.

The minimum value is the smallest number of hours and minutes kept track of the first time the labor item is added to a service call. For example, if 30 minutes is the minimum time value, the customer is charged for 30 minutes even if the travel time was only 20 minutes.

The rounded value is the smallest whole unit the labor time is rounded to for actual recorded time. For example, if 15 minutes is the rounded time value, the customers is charged for 45 minutes even if the travel time was only 37 minutes.

Use miscellaneous charges to add items to service calls or modify the price of items on service calls. Expense items and additional charge items, specified with a currency amount, are added to service calls automatically. Items specified as a percentage modify the price of the item when you manually add the item to the service call.

Escalations allow you to automate the notification life cycle for your service activities.

You can set up accounts in the Service Type Account window, and they will appear as the default sales account in the distribution windows.

1. Open the Service Type Maintenance window.
Cards > Service Call Management > Service Types

The screenshot shows the 'Service Type Maintenance' window with the following details:

- Service Type:** PM
- Description:** PM Service Calls
- Default Tech ID:** (blank)
- Document ID:** SERWINV
- Credit Document ID:** SVCRTN
- Zero Document ID:** SVCZERO
- Batch ID:** SERVICE
- Credit Batch ID:** SVC CREDITS
- Zero Batch ID:** SVCZERO BATCH
- Payables Batch ID:** (blank)
- Options:** Contract, P.M., Sales Only, Subcontractor
- Default Labor Items Table:**

| Standard | Item | Minimum | Rounded |
|----------|------------|---------|---------|
| | 5-STDLABOR | 000.00 | 000.00 |
| | 5-OVTLABOR | | |
| | 5-DBLLABOR | | |
| | 5-TVLLABOR | 000.00 | 000.00 |
| | 5-HOTLINE | 000.00 | 000.00 |
- Misc. Charges Table:**

| Item Number | Qty | Price/Pct. | A/P | P | L | E | A |
|-------------|------|------------|-----|-------------------------------------|--------------------------|-------------------------------------|--------------------------|
| 5-STDLABOR | 1.00 | 25.00 | P | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3-C2924A | 1.00 | 25.00 | P | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5-FEE | 1.00 | 100.00 | A | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | 0.00 | 0.00 | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

2. Enter a service type ID and description.
3. Enter a default technician ID to indicate that a specific technician always will be assigned to this type of service call. If a technician should be selected during each service call entry, leave the **Default Tech ID** field blank.
4. Specify the document types to use during service call billing to create the Sales Order Processing documents for charges and credits. You can choose unique document IDs for invoices, credits (returns), and zero currency invoices.



The document types and batch IDs specified in the Service Setup window appear here automatically.

5. Specify the batch IDs to use to create the billing documents. You can designate separate batches for invoices, credits (returns), zero currency documents, and subcontractor payables vouchers.
6. Select options to specify the service type for the following functions:

Contract Service calls that are covered by a service contract. These calls are excluded from MTBF (Mean Time Between Failure) and MTTR (Mean Time to Repair) reporting.

PM Service calls that are generated through preventive maintenance scheduling. These calls are excluded from MTBF and MTTR reporting.

Sales Only Service calls that are used for only sales purposes, not services, allowing the sale of installable parts to a customer through a service call.



When an item number, selected as returnable in the Item Extensions window, is placed on a service call with a sales-only service type, this part of return line will not automatically be created.

Subcontractor Service calls that are performed by a subcontractor. When service calls are billed, vouchers will be generated in Payables Management for subcontractor labor, expenses, or additional charges. If this option is selected, a **Payables Batch ID** entry is required.

7. Enter the default labor items for the service type.



Providing different labor items allows different accounts to be affected in General Ledger and allows for more control over labor pricing.

Standard Labor hours within a technician's regular work schedule.

Overtime Hours outside of a technician's regular work schedule.

Double Time Hours manually assigned for a technician's labor entry.

Travel Time consumed between the dispatch time and arrival time on a service call.

Hotline Time posted when entering hotline information on a service call will use the hotline labor item.

8. Enter minimum values and rounding values for standard, travel, and hotline labor items.
9. If there are miscellaneous charge items associated with the service type, enter or select an item number and the quantity. Then specify the value as an amount or percentage by typing **A** or **P**. Select the line type option for the item **P** (part), **L** (labor), **E** (expense), **A** (additional charge).
10. Click **Service Tasks** to add service codes and tasks for each service type.
11. Click **Escalation** to create the escalation steps for each service type.
12. Select an escalation type.
13. Enter the steps in order, then specify the wait time for each step within the escalation path.
14. Click **Copy** to copy the escalation to the service type you choose or click **OK** to return to the Service Type Maintenance window.
15. Click **Accounts** to set up the default sales posting accounts for service call parts, labor, additional charges, and expense transactions.
16. Click **Save**.

Miscellaneous charges for service calls

The following tables depict how the miscellaneous charges displayed on the service type affect the price of the service call lines. The information is presented as you would encounter the fields in the Service Type Maintenance window.



Quantities affect only items with currency amounts when the initial service call is created. Quantities on the service type do not affect items added manually to existing service calls. Items with charges specified as a percentage are never affected by quantity from the service type.

Initial service call creation

If you have two separate lines for the same item, but different currency amounts, the initial service call line creation results in two separate lines on the service call for each price. Additions to existing service calls combines the currency amount into one line for the sum of the two and then adds any other necessary price information.

| Service Type Modification | Resulting Service Call and Lines |
|--|--|
| Item + (quantity>=1) + \$X.XX + (A) + E or A | Service Call with E or A line at \$X.XX multiplied by specified quantity |
| Item + (quantity=0) + \$X.XX + (A) + E or A | Service Call with no lines |
| Item + XX% + (P) + P or L or E or A | Service Call with no lines |
| Blank Item + (quantity>=1) + \$X.XX + (A) + E or A | Service Call with E or A lines (no item number) at \$X.XX multiplied by specified quantity |
| Blank Item + (quantity=0) + \$X.XX + (A) + E or A | Service Call with no lines |
| Blank Item + XX% + (P) + P or L or E or A | Service Call with no lines |

Existing service call updates

Percentages can apply to all four service call line item types (parts, labor, expenses, and additional charges). The percentage specified modifies the price of the item as either an increase (positive value) or discount (negative value). You must manually add the item to the appropriate line type window of the service call for the price to be marked up or marked down.

| Service Type Modification | Resulting Service Call Lines |
|---|---|
| Item + XX% + (A) + E or A | E or A line at Item Price + \$X.XX |
| Item + XX% + (P) + P or L or E or A | P, L, E, or A lines at Item Price * XX% |
| Blank Item + XX% + (A) + E or A | Blank item number E or A line with \$X.XX added to the item price of any item added to the service call |
| Blank Item + XX% + (P) + P or L or E or A | Blank item number P, L, E, or A line with the item price of any item added to the service call * XX% |



Percentages do not add the item to the service call automatically.

Amounts apply only to expense items and additional charge items. The price specified in the Service Type Maintenance window is used regardless of any other price information for the item (price level, list price, or price).



Amounts automatically add the item to the service call.

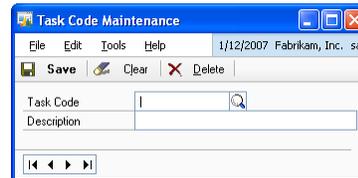
To apply an amount or a percentage to all items added to a line type window, leave the **Item Number** field blank. Then, enter an amount or a percentage value and select the line type option you want to charge to apply towards.

The amounts and percentages shown on the service type miscellaneous charges window are cumulative based on the order they appear in on the table.

Set up task codes

You can set up and customize an unlimited number of task codes to add to a service code. Using task codes allows you to describe each process to be performed for the service call.

1. Open the Task Code Maintenance window.
Cards > Service Call Management > Task Codes

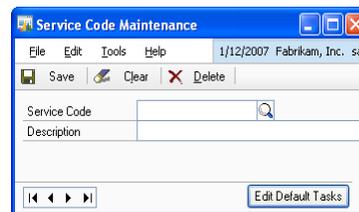


2. Enter a task code ID and description.
3. Click **Save**.

Set up service codes

You can set up and customize groups of task codes, called service codes to represent a category of work that has multiple steps or tasks.

1. Open the Service Code Maintenance window.
Cards > Service Call Management > Service Codes

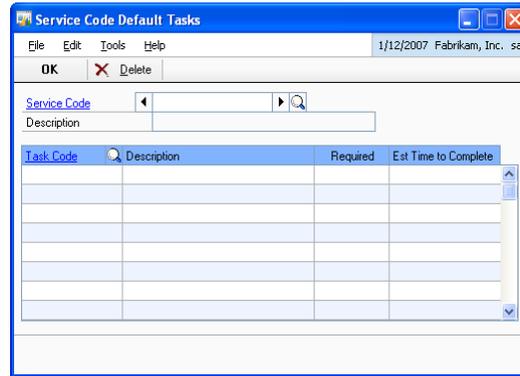


2. Enter a service code and description.
3. Click **Save**.

Set up default service code tasks

You can customize the task codes for each service code by selecting which tasks are required and including an estimated completion time for each task.

1. Open the Service Code Default Tasks window.
Cards > Service Call Management > Service/Tasks



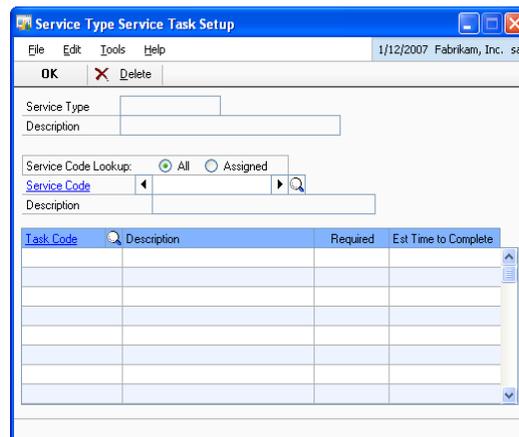
2. Enter or select the service code to customize the task codes for.
3. Select a task code.

Select whether the task is required.
4. Enter an estimated completion time, in minutes.
5. Click OK.

Set up service codes and tasks by service type

You can customize the tasks listed for the service codes linked to the selected service type by selecting which tasks are required and including an estimated completion time for each task.

1. Open the Service Type Service Task Setup window.
Cards > Service Call Management > Service Types > Service Tasks button



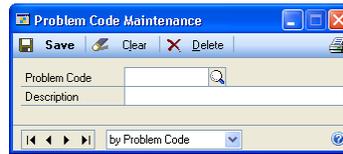
2. Enter or select a service code.
3. Edit, remove, or add tasks as necessary.

4. Mark the tasks that are required to be completed by the technician and enter an estimated completion time for each task.
5. Click **OK**.

Set up problem codes

You can set up and customize an unlimited number of problem codes to represent general issues encountered when repairing equipment. Using problem codes allows you to create reports to analyze the problems reported on service calls.

1. Open the Problem Code Maintenance window.
Cards > Service Call Management > Problem Codes

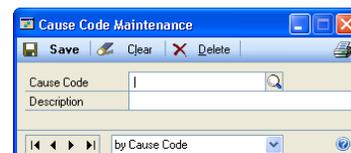


2. Enter a problem code ID and description.
3. Click **Save**.

Set up cause codes

You can set up and customize an unlimited number of cause codes to represent general root causes for failures encountered when repairing equipment. Using cause codes allows you to create reports to analyze the root failures reported on service calls.

1. Open the Cause Code Maintenance window.
Cards > Service Call Management > Cause Codes

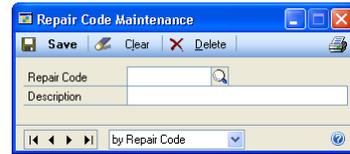


2. Enter a cause code ID and description.
3. Click **Save**.

Set up repair codes

You can set up and customize an unlimited number of repair codes to represent the general procedures used to repair equipment. Using repair codes allows you to create reports to analyze the repair procedures used on service calls.

1. Open the Repair Code Maintenance window.
Cards > Service Call Management > Repair Codes

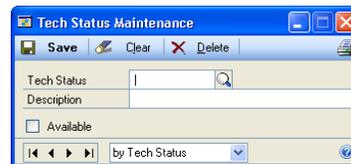


2. Enter a repair code ID and description.
3. Click **Save**.

Set up tech status codes

You can set up an unlimited number of technician status codes to represent a technician’s availability for service call assignment. Create a specific status code for each situation where a technician may be available or unavailable. For example, you may have statuses of available, training, vacation, sick, appointment, and so on.

1. Open the Tech Status Maintenance window.
Cards > Service Call Management > Tech Status

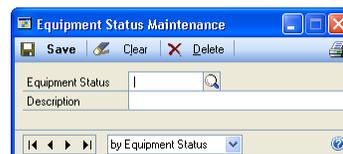


2. Enter a tech status code ID and description.
3. Select the **Available** option if a technician with the status code is available for service call assignment.
4. Click **Save**.

Set up equipment status codes

You can set up and customize an unlimited number of equipment status codes, which represent stages in the life cycle of specifically identifiable equipment. Some examples of equipment statuses include installed, rental, and leased.

1. Open the Equipment Status Maintenance window.
Cards > Service Call Management > Equipment Status



2. Enter an equipment status code ID and description.
3. Click **Save**.

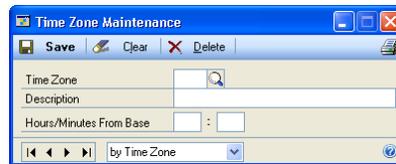
Set up time zone codes

You can set up and maintain time zones by creating codes to represent the time zones where your company provides service.

One of your time zone codes is defined as the base time zone (in the Service Setup window) and should have a value of zero (0) in the **Hours From Base** field.

For the additional time zone records, you can enter the number of hours plus or minus (+/-) from the base time zone. For example, if Central Time Zone is used as the base time zone, the amount from the base time zone equals zero (0). For Eastern Time Zone, the amount from base would be +1, or one hour ahead of the base time zone. For Mountain Standard Time, the amount from base would be -1, or one hour behind the base time zone.

1. Open the Time Zone Maintenance window.
Cards > Service Call Management > Time Zones



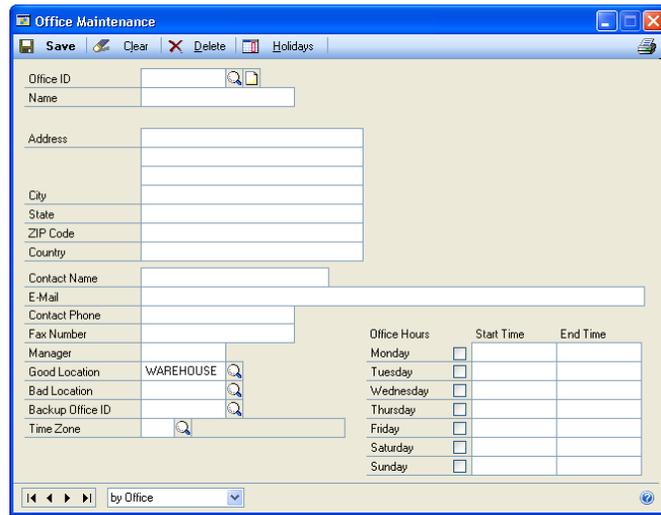
2. Enter a time zone ID and description.
3. For each additional time zone record, enter the number of hours plus or minus (+/-) from the base time zone.
4. Click **Save**.

Set up office location codes

You can set up an unlimited number of office location codes. An office ID is a unique identification code representing specific office locations for your company.

You can set up good parts locations and bad parts locations. A good parts location is the site where parts are used from as indicated on the Install and Consumable lines on a service call. The bad parts location is the site where parts are returned as indicated by the return line on a service call. These sites are assigned to the office if a technician is not assigned to the service call.

1. Open the Office Maintenance window.
Cards > Service Call Management > Office



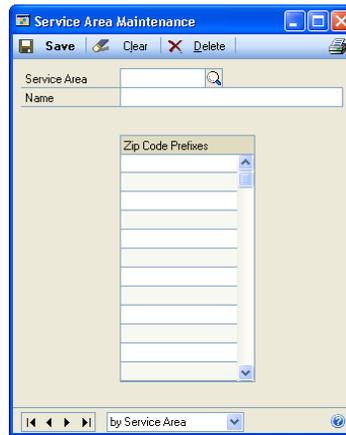
2. Enter office ID codes that represent the various sites within your company that provide service.
3. Enter details about each office.
4. Enter an inventory site for the **Good Location** and **Bad Location** for the office.
5. Enter the **Office ID** that is to be used as a backup for the office. The **Backup Office ID** is only an informational field.
6. Assign the time zone that the office is located in and the days and hours that the office is open for business.
7. Click **Holidays** to enter details about the holidays your company recognizes.
8. If your company takes service calls even when the office is closed for a specific holiday, select the **Service** check box in the scrolling window. If your company takes contract calls when the office is closed, select the **Contract** check box.
9. Click **Defaults** to automatically enter the holidays previously defined in the Service Setup window.
10. Click **Copy** to copy holidays from another Office ID.
11. Click **Save**.

Set up service areas

You can create, modify, or delete the geographical areas serviced by your company.

The information in the ZIP code field is used to fill in the service area for an equipment item automatically based on the ZIP code when entering a call in the Service Call Entry/Update window. Service areas are cross-referenced to the technician to determine the area that each technician normally works in.

1. Open the Service Area Maintenance window.
Cards > Service Call Management > Service Area



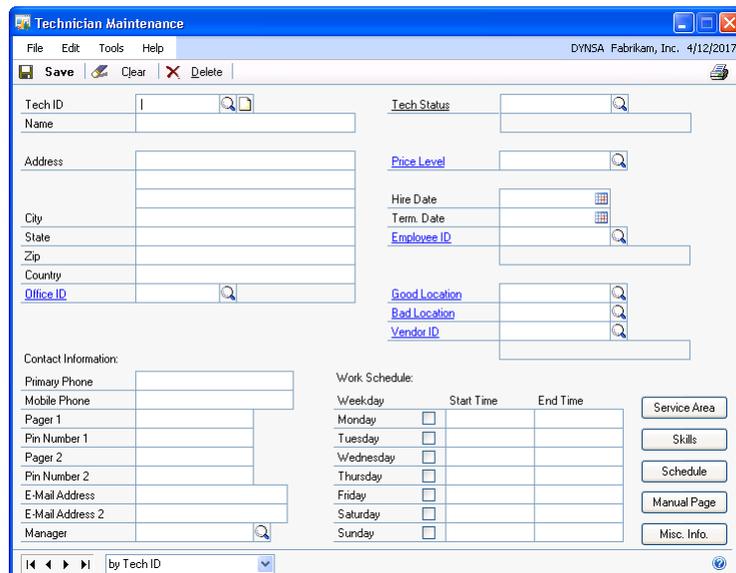
2. Enter a service area ID and name.
3. Enter the ZIP code that uniquely identifies each service area represented.
4. Click **Save**.

Set up technician records

You can maintain technician address information, contact information, and work schedules. You also can create, modify, or delete technician records.

Price levels can be used if you have variable billing rates for technicians, giving you the flexibility to set a price level for a customer for parts and still be able to charge for labor when a technician is involved in a service call.

1. Open the Technician Maintenance window.
Cards > Service Call Management > Technicians



2. Enter a technician ID and name.
3. Enter the address information for the technician.
4. Assign a tech status to the technician record to determine the technician's availability for assignment.
5. Specify the price level to be used to determine the price on labor transactions in Service Call Entry – Labor window.
6. Enter the hire and termination dates.
7. Enter an employee ID if payroll integration is activated in the Service Setup window. For more information, see [Set up Field Service and Payroll integration](#) on page 29.
8. Enter an inventory site for the **Good Location** and **Bad Location** for the technician. These sites will be used if a technician is assigned to the service call. See [Set up office location codes](#) on page 20 for more information.
9. Enter or select a vendor ID if you want to allow subcontractor payables vouchers to be generated for this technician.
10. Enter the technician's contact information.
11. If you use escalations to send e-mail through SQL Mail to technicians, specify the technician's default e-mail address in the **E-Mail Address** field. You can track a second address in the **E-Mail Address 2** field.
12. Enter or select the name of the manager who the technician reports to.



Enter a valid tech ID if you want to use the "manager" option in service type escalations.

13. Select the work days and times in a 24-hour format. Technician work schedules, among other criteria, are used when assigning technicians to service calls.
14. Click **Service Area** to specify the service areas a technician may normally work within.
15. Click **Skills** to track a technician's qualifications to repair specific items or to address a specific problem for an item.
16. Click **Schedule** to enter dates and times when a technician isn't available to work, such as vacation or training periods.
17. Click **Manual Page** to page a technician. Specify the **Pager Address** for the technician along with the message you want to send to the technician.
18. Click **Misc. Info.** to enter information about company assets issued to a technician, such as a laptop computer, diagnostic equipment, cellular phone, or a company vehicle.
19. Click **Save**.

Set up default service call entries

You can set up default entries and other information that affects Service Call Management.

If you have selected the **Create Equipment from PO Receiving** check box, you can expand this capability to items without serial numbers by selecting the **For Non-Serial Tracked Items** check box. When this option is selected, you can identify specific items to generate an equipment record by selecting the **Create Equipment from PO Receiving** check box in the Item Site Extensions window.

1. Open the Service Setup window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup

2. Enter the in-stock and return equipment status.
3. Enter the customer IDs for each piece of equipment.
4. Select the **Create Equipment from SOP** check box to have equipment records automatically created from Sales Order Processing.
5. Select the **Create Equipment from PO Receiving** check box to have equipment automatically created from Purchase Order Processing.
6. Enter names for the five user-defined fields that are available in the Equipment Maintenance window when you enter records, allowing you to enter information that is unique to the equipment record.
7. Enter the transfer defaults that are used when creating inventory requirements.

Specify the **Site ID** that is used when creating transfers.

Specify the number of days for the Overdue Transfer Report.

Set the default entries for the **Disable Consolidation** and the **Create History Distribution Records** options.

8. Specify the options that will affect Service Call Management and the service call documents that you enter.

Allow Non-Inventoried Items Allows entry of items that don't exist in your inventory records. Marking this option allows you to make such entries in all Field Service Series modules.

Use the Sales Order Processing Setup window to specify the number of decimal places used for non-inventoried item quantities and currency amounts. Use the Sales Order Processing Setup Options window to specify tax options for non-inventoried items sold through the Field Service Series. Use the Purchase Order Processing Setup Options window to specify tax options for non-inventoried items when a purchase order is created from the Field Service Series.

For more information about using non-inventoried items, see [Non-inventoried items in the Field Service Series](#) on page 26.

Use SOP Enables the integration between Service Call Management and Sales Order Processing.

Use Returns Enables the integration between Service Call Management and Returns Management. When this option is selected, entering a quantity sold on the Returnable line on a Service Call Parts line creates an RMA automatically in Returns Management.

Use Payable Management Enables integration between Returns Management and Payables Management. The default setting for this option is selected if Payables Management is registered.

Selecting this option allows the following types of documents to be generated automatically in Payables Management.

- Shipping or closing Return To Vendor (RTV) documents will generate credit documents.
- Billing service calls will generate vouchers for subcontractor labor, expenses, or additional charges. For more information about enabling this feature, see [Set up technician records](#) on page 22 and [Set up service types](#) on page 12.

Use Return Price Level Allows you to enter the price level to be used for customer returns. The system searches for the price level you specify on the item card of the item being returned and will use that price as the credit back to your customer.

If you don't select the **Use Return Price Level** check box, the standard pricing is used for a return customer credit. That standard pricing includes your search for a valid price level from the customer and item cards.

9. If you are using Purchase Order Processing and want to integrate it with Field Service applications, select **POP** as the PO Interface. If you do not want to integrate to Purchase Order Processing or are not using Purchase Order Processing, select **None**.

10. Click **Add-Ons** to enter the file location of the street mapping software accessible within the Service Call Dispatch window (**Transactions > Service Call Management > Service Dispatch**).
11. Click **OK**.

Non-inventoried items in the Field Service Series

You can set up the Field Service Series to allow entering items that don't exist in your inventory records. For information about activating this feature, see [Set up default service call entries](#) on page 24.

When you enter a non-inventoried item, you can specify an eight-character unit of measure or accept the default, "Each." The item's description field will be blank and not editable. Item warehouse quantities won't be checked, and inventory transfers or adjustments won't be created.

You can create item extensions for non-inventoried items, but not for item-site extensions. You can't create work orders for non-inventoried items.

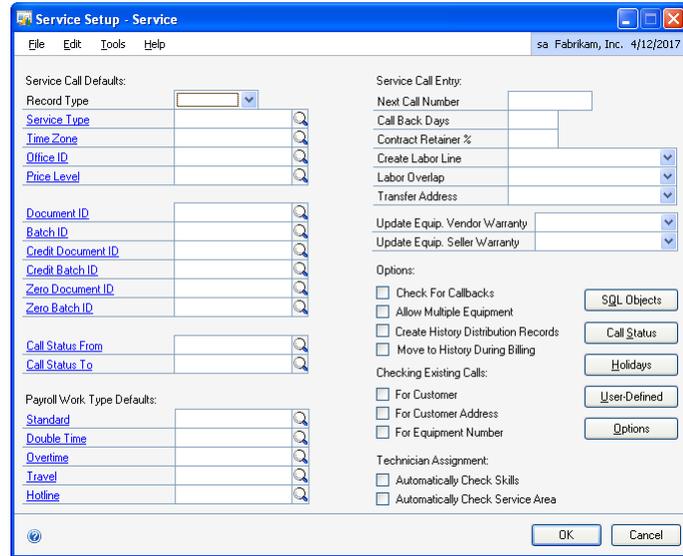
The following default accounts are used for non-inventoried items.

| Account | Source |
|---------------------|--|
| Inventory | The account assigned to non-inventoried items for the Sales series in the Posting Account Setup window. |
| Cost of Goods Sold | The following accounts are used, in order of preference: <ul style="list-style-type: none"> - The account for the service type or RMA type, if one is specified. - The account assigned to the customer, if you are using posting accounts from the customer. - The account from the Inventory series in the Posting Account Setup window, if you are not using posting accounts from the customer. |
| Sales | The following accounts are used, in order of preference: <ul style="list-style-type: none"> - The account for the service type, contract type, or RMA type, if one is specified. - The account assigned to the customer, if you are using posting accounts from the customer. - The account from the Inventory series in the Posting Account Setup window, if you are not using posting accounts from the customer. |
| Accounts Receivable | The account assigned to the customer. If no account is assigned to the customer, the system uses the account from the Sales series in the Posting Account Setup window. |
| Markdown | The account from the Inventory series in the Posting Account Setup window. |

Set up default entries and options

You can set up default entries and other information, such as service type, batch information, and call status details that affect service call documents. You also can set up security options for service call documents.

1. Open the Service Setup – Service window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button



2. Set up common entries that appear automatically when entering service call documents.

Record Type The type that appears when you open the Service Call Entry/Update window.

Service Call Defaults The ID of the service type, time zone, office ID, and price level you use most often. The entries you make here are the default entries in the Service Call Entry/Update window.

Document Defaults The default entries for the document ID, batch ID, credit document ID, credit batch ID, zero document ID, and zero batch ID that are used when setting up new service types.

Call Status Defaults The default status codes to be displayed within the Service Call Dispatch window. The status codes entered here are used the first time a user enters the Dispatch window. Once you designate your own range of codes, that range is used to display service call records.

3. Set up common entries that appear automatically when entering service call documents.

Next Call Number The next call number to be assigned when a new service call is created in the Service Call Entry/Update window.

Call Back Days The default number of days for a customer call back. If you receive more than one service call on a piece of equipment within the specified number of days and the **Check for Callbacks** option is selected in this window, you will receive the message, "This is a possible recall Service Call." The value entered helps determine whether a new call taken for an item should be considered a "call back" or a new incident.

Contract Retainer Percentage The point when the operator should be notified that a customer is within the specified remaining retainage percentage on their contract. For example, if you specify 10% and a contract line item originally specified \$1000 of retainage, a warning would be displayed when \$100 or less retainage remains.

Create Labor Line The creation of service call labor line items in the Service Call Entry/Update window.

Labor Overlap If selected, labor line items in Service Call Management can overlap.

Transfer Address The default address in the **Address Option field** when new customer extensions are created.

4. Select a method for updating the vendor warranty information on the equipment master record.
5. Select a method for updating the seller warranty information on the master seller record.
6. Customize the options available for service call entry.

Allow Multiple Equipment If selected, you can type information for more than one item with a serial number on a service call, and the serial number expansion window will be accessible. Data for mean time reports is available on only the first item reported.

Check For Callbacks Select to be alerted when a new call back service call is received within the number of days specified in the **Call Back Days** field.

Create History Distribution Records If selected, corresponding distribution history records are created and moved to history when the service call or service inventory transfer is moved to history. If cleared, the distribution records will not be available for inquiry on history records.

Move to History During Billing Select to automatically transfer service calls to history when the billing process is complete. If cleared, you'll need to use the Move Service Calls to History window to perform this task manually. See [Transfer service calls to history](#) on page 84.

7. Specify whether to be alerted of service calls for the following selections.

For Customer Select to receive a warning if an open service call already exists when entering a new service call for a customer in the Service Call Entry/Update window.

For Customer Address Select to receive a warning if an open service call already exists when entering a new service call for a customer address in the Service Call Entry/Update window.

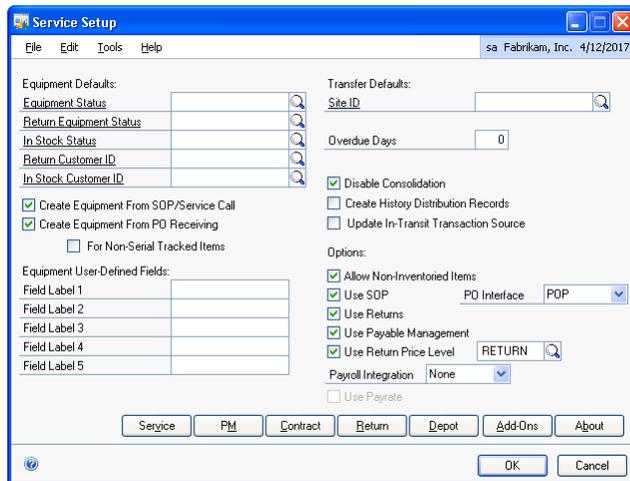
For Equipment Number Select to receive a warning if an open service call already exists when entering additional service calls for an equipment number in the Service Call Entry/Update window.

8. Select the **Automatically Check Skills** and **Automatically Check Service Area** option. Available technicians are assigned based on skills and service area when calls are generated from the Engineered Change Order process or Preventive Maintenance generation process.
9. Click **OK**.

Set up Field Service and Payroll integration

You can set up the Field Service Series to post labor information from Field Service to Payroll. Payroll transactions can be based on the information that is entered in the Service Call Entry – Labor, Labor Information, and Indirect Labor Entry/Update windows in Service Call Management, the Labor Information and Labor Posting windows in Depot Management, and the Field Service Labor – Payroll window. The cost from the employee’s pay code also integrates to the labor record in the Field Service Series.

1. Open the Service Setup window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup



2. In the **Payroll Integration** field, select **US Payroll**.
3. To use the cost from the employee’s pay code as the default entry for the corresponding labor record in the Field Service Series, select **Use payrate**.

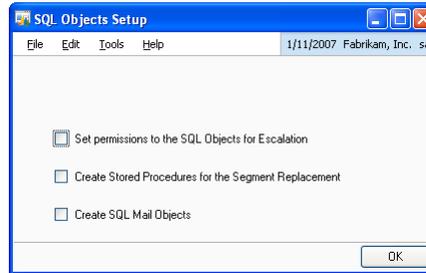
- Click **Service** to open the Service Setup – Service window.

- Click a labor type lookup button, such as **Standard**.
- In the Work Type Lookup window, highlight the work type to use as the default entry for standard labor types. Click **Zoom**.
- In the Work Type Maintenance window, select **Post To Payroll** and select a pay code.
- Save the record and then close the Work Type Maintenance window.
- Select the work type and click **Select** to close the Work Type Lookup window.
- Repeat steps 5 through 9 for the remaining labor type fields in the **Payroll Work Type Defaults** section.
- Click **OK**.

Set up permissions for SQL objects

The system administrator can set up permissions for Microsoft Dynamics GP users who perform service call escalations.

1. Open the SQL Objects Setup window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button > SQL Objects button



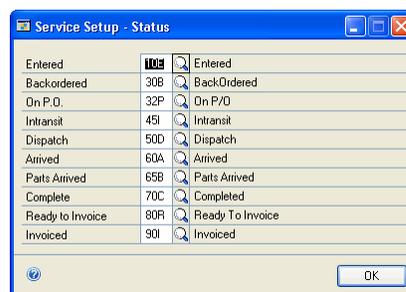
2. Select the **Set permissions to the SQL Objects for Escalation** check box.
3. You can select the **Create Stored Procedures for the Segment Replacement** check box to have stored procedures created for segment replacement.
4. Click **OK**.

Set up default call status codes

You can assign the default call status codes for each status displayed. Status codes are updated automatically on each service call depending on certain processes. These statuses help to determine the service call escalation life cycle.

To create the call status codes, use the Call Status Maintenance window. For more information, see [Set up call status codes](#) on page 11.

1. Open the Service Setup – Status window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button > Call Status button



2. Enter the default status codes for each of the displayed statuses. The status codes entered in the Service Setup – Status window update the service call automatically based on where the service call is in the service call life cycle.
3. Click **OK**.

Set up schedule holiday templates

You can define the holidays that your company observes by creating a template. The template provides default entries for the holiday schedule in the Office Maintenance window.

1. Open the Holidays window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button > Holidays button

| Description | Start Date | End Date |
|------------------|------------|------------|
| New Years Day | 1/1/2003 | 1/1/2003 |
| Memorial Day | 5/26/2003 | 5/26/2003 |
| Independence Day | 7/4/2003 | 7/3/2003 |
| Labor Day | 9/8/2003 | 9/7/2003 |
| Thanksgiving Day | 11/27/2003 | 11/26/2003 |
| Christmas Day | 12/25/2003 | 12/25/2003 |
| New Years Day | 1/1/2004 | 1/1/2004 |
| Memorial Day | 5/31/2004 | 5/31/2004 |
| Independence Day | 7/4/2004 | 7/5/2004 |
| Labor Day | 9/6/2004 | 9/6/2004 |
| Thanksgiving Day | 11/25/2004 | 11/25/2004 |
| Christmas Day | 12/25/2004 | 12/24/2004 |
| New Years Day | 1/1/2005 | 1/1/2005 |
| Memorial Day | 5/30/2005 | 5/29/2005 |

2. Click the hide and show buttons.
3. Enter the name of the office to enter holiday information for.
4. Enter a description of the holiday and specify when it starts and ends.
5. Select the **Service** option to take service calls even when your office is closed.
6. Select the **Contract** option to take contract type service calls on holidays when your office is closed.
7. Click **OK**.

Set up user-defined fields

You can customize the user-defined field names that are available in the Service Entry – Additional Information window, where you can enter information that is unique to each service call.

1. Open the Service Setup – User–Defined window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button > User–Defined button



2. Enter a name for the additional information to be tracked when entering service calls.
3. Click **OK**.

Set up service document security

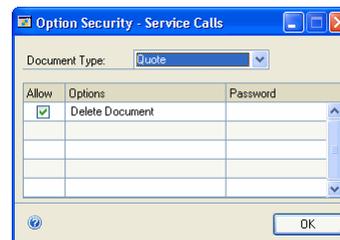
Because you can delete quote, open, and invoiced (history) service call documents all in one window, you might want to prevent users from deleting specific document types. For example, you might want to allow only a few users to delete open and historical documents, while allowing all users to delete quotes.

By default, the **Allow** option is selected for the document types you select, allowing all users to delete any document type.

You also can control security for other document options, such as the ability to attach future contracts, change contract response times, and make changes to invoiced service calls.

You can enter a password for the document type security setting, however, a password is not required. If no password has been entered, anyone who has access to the Service Call Entry/Update window can delete service call documents.

1. Open the Option Security – Service Calls window.
Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button > Options button



2. Select a document type to create security options for.
3. Clear or select the **Allow** check box for the specified option.

4. Enter a password for the document type security setting to help prevent unauthorized users from making changes.
5. Click **OK**.

Set up warranties

You can define codes that represent the different types of warranties offered to your customers. These codes may represent the original manufacturer's warranty or your company's warranty on equipment serviced and sold by your company.

If the warranty is active, the default service type is set up from the Warranty card. Once a warranty period expires, the default service call type is the type that is specified in the Service Setup window. You'll still be able to assign service calls once the warranty expires. The service call will be billable at the default service call rate.

1. Open the Warranty Maintenance window.
Cards > Service Call Management > Warranty

The screenshot shows the 'Warranty Maintenance' window with the following fields and table:

- Warranty Code: []
- Description: []
- Vendor ID: []
- Valid For: [] Days
- ETA: [] Days
- Location: []
- Service Type: []
- RMA Type: []
- RTV Type: []

| | Vendor | A/P | Customer | A/P |
|------------------------|--------|-----|----------|-----|
| Parts | [] | A | [] | P |
| Labor | [] | A | [] | P |
| Add'l Charges/Expenses | [] | A | [] | P |

Vendor Authorization: [] PO Required

Navigation: [] by Warranty Code

2. Enter or select a **Warranty Code** and a short description.
3. If the warranty is provided by an original manufacturer, enter or select the appropriate vendor ID representing the manufacturing vendor.
4. Enter the number of days that the warranty code is valid for.
5. Enter the estimated number of days to return the item to its final destination.
6. Enter or select an inventory location to be used as the default location for this warranty record.
7. Enter or select the service type to use as the default window when you create a service call for an item that's covered by the warranty.
8. Enter the RMA type and RTV type used to represent the different types of returns your company supports for the warranty type.

9. Type the currency amount or billable percentage the vendor will reimburse for on a service call under the warranty.

Enter an **A** if the value is a currency amount. Enter a **P** if the value is a percentage.

10. Type the currency amount or billable percentage the customer is responsible to pay for parts, labor, and additional charges on a service call for an item under warranty.

Enter an **A** if the value is a currency amount. Enter a **P** if the value is a percentage.

11. Type the code that the vendor has given for this record's warranty coverage maintenance in the **Vendor Authorization** field.
12. Select the **PO Required** option if a purchase order number is required for this warranty code.
13. Click **Save**.

Set up customer extensions

You can create, modify, or delete additional customer information that's not available in Receivables Management. You also can enter the default time zone, office hours, service area, and other information that may be used when servicing the customer account.

The customer extension information is stored for each customer and address combination.

The bill-to customer information is entered automatically on a service call when the customer ID and address ID on a service call match an existing customer extension record.

You can indicate a customer's preference for the month that annual preventive maintenance events and the day that monthly preventive maintenance events are to be performed. This information is used as the default entries in the **PM Month** and **PM Day** fields in the Equipment Maintenance window.

1. Open the Customer Extensions window.
Cards > Service Call Management > Extensions > Customer or Cards > Sales > Addresses > Select a customer and an address ID > Additional > Service Extensions

2. Enter or select a customer and address.
3. Select customer information.
4. Select the **Consolidate Service Invoices** check box to allow consolidation of all billed service calls into a single sales invoice to the customer. See [Consolidate service invoices](#) on page 77 for more information.
5. Select the **Consolidate Contract Invoices** check box to allow billing for multiple contracts to be consolidated into one invoice. A single invoice will be generated for all contracts that apply to customers having the same bill-to address.
6. Select the **Allow PMs** check box to indicate that preventive maintenance service call requirements may be generated for the customer.
7. Select the **Annual PM Month** and **Day** fields to set the customer's preferences for when preventive maintenance events are performed.
8. Select an address option for the default address option for creating inventory transfers to fulfill a back-ordered part from a service call parts line.
9. Click **Service Hours** to enter the customer's preferred service time.
10. Click **Contacts** to enter contact information for multiple contacts. You can track them for each customer by address ID.
11. Click **Unavailable** to enter the times when the customer is not available for service work to be performed.
12. Click **Save**.

Set up item extensions

You can assign, modify, or delete additional item information that is not available in Inventory Control. For example, certain items might be returnable and other items might be metered, which is important for service situations.

When you set the default vendor and seller warranty codes for any item, the default codes appear when you enter new items in the Equipment Maintenance window.

1. Open the Item Extensions window.
Cards > Service Call Management > Extensions > Item or Cards > Inventory > Item > Additional > Service Extensions

2. Enter or select an item number.
3. Select additional features for the item.

Metered An item that tracks a quantity for rate of flow or usage. For example, a copy machine that tracks the number of copies made is metered.

Contractible The item number that may generate a service contract from Sales Order Processing automatically.

Returnable The item that can be returned from a customer through the Service Call Entry – Parts window. If an item selected as “returnable” is installed on a service call, a return line is created automatically for the selected item. If the original item is not returned, the return line can be deleted manually.

Use Current Cost The item’s cost in inventory that is used when processing the item as a return. When selected, the current cost overrides the returned item cost.

Allow PMs The item that may be scheduled for preventive maintenance.

4. Enter the vendor and seller warranty information that applies to the piece of equipment.
5. Enter the estimated number of days for the item’s **MTBF** (Mean Time Between Failure), the **MTBI** (Mean Time Between Incidents), and the **MTTR** (Mean Time To Repair).

- Enter the returned item cost, which is the currency amount specified for use as your inventory cost when processing a returned item from a customer.
- Click **Save**.

Set up item site extensions

Certain items use a specific restocking path and shipping method. You can assign, modify, or delete item site restocking information that's not available within Inventory Control.

You cannot set up item site extensions for non-inventoried items.

- Open the Item Site Extensions window.
Cards > Service Call Management > Extensions > Item Site or
Cards > Inventory > Quantities/Sites > Additional > Service Extensions

- Enter or select an item number.
- Enter the location that needs to be restocked with the selected item.
- Add item site restocking information for inventory items that may be transferred in Service Call Management.

Restock From The site ID for the warehouse that is responsible for restocking the selected location with the item.

Restock Via The site ID that is the interim location during an inventory transfer, for restocking inventory.

- If the item selected in the **Item Number** field is not set up to track serial numbers in inventory and you have selected the **For Non-Serial Tracked Items** check box in the Service Setup window, you will have access to the **Create Equipment from PO Receiving** check box.

If the check box is selected on the item site record, an equipment record is created when a purchase order is received in Purchase Order Processing for the item and site combination.

- Specify the stock type.

7. Enter or select the shipping method to use when transferring inventory between sites.
8. Specify the **ETA** (estimated time of arrival), in days, for the item. The number of days entered is used to establish the ETA date for inventory transfers.
9. Click **Save**.

Set up equipment maintenance cards

You can create a record for any specifically identifiable equipment within your customer-installed database. The maintenance card contains all of the information for this equipment, including the owner and the location of the equipment and warranty information. You can track several dates for each equipment item.

The equipment record can be created automatically when you receive an item in the Purchase Order Receiving window, when you sell a serial-numbered item in Sales Order Processing, or when a new serial-numbered item is added to a service call.

The **Quantity** field is available only for equipment items that don't have serial numbers and allows you to track multiple quantities of the equipment.

The equipment number and item number typed must create a unique combination. Duplicate equipment number and item number combinations are not allowed.

To create an equipment record from Purchase Order Processing, select **Create Equipment from POP** in the Service Setup window. To create an equipment record from Sales Order Processing, select **Create Equipment from SOP** in the Service Setup window. During the Sales Order Processing posting process, the equipment card is created for any items with serial numbers on an invoice document.

1. In the navigation pane, choose the **Field Service** button, and then choose the **Equipment** list.
2. Choose the **New Equipment** button to display the Equipment Maintenance window.

The screenshot shows the 'Equipment Maintenance' window with the following data:

| | | | | | |
|-------------------------|----------------------|-------------------------|-----------|----------------------|------|
| Equipment Number | 32225816SL | Equipment Status | INSTALL | Qty | 1.00 |
| Item Number | 4-E2094A | Reference | 2094-6SL | | |
| Serial Number | 32225816SL | Version | | | |
| Customer ID | WESTCENT0001 | Asset Tag | | | |
| Address ID | PRIMARY | SDP Number | | | |
| Contact Name | John Oleander | Service Area | CENTRAL | Central Service Area | |
| Address | 3001 Woodridge Drive | Office ID | C-01 | TW0 Central | |
| City | Overland Park | Tech ID | | | |
| State | KS | Date History: | | | |
| ZIP Code | 66175 | Ship | 6/12/2004 | ECO's | |
| Country | USA | Install | 6/12/2004 | Configuration | |
| Time Zone | CST | Register | 6/12/2004 | Supersessions | |
| Vendor ID | | Last P.M. | 0/0/0000 | Meter Readings | |
| Vendor Warranty | | Last Serviced | 0/0/0000 | PM Schedules | |
| Vendor Warranty Start | 0/0/0000 | PM Month | | PM History | |
| End | 0/0/0000 | PM Day | 0 | | |
| Seller Warranty | | Contract | | | |
| Seller Warranty Start | 0/0/0000 | Contract Type | | | |
| End | 0/0/0000 | Contract Start/End | 0/0/0000 | . 0/0/0000 | |

3. Enter or select an equipment number and an equipment status.
4. Enter additional information that pertains to the equipment record in the **Reference, Version, and Asset Tag** fields.

The **SOP Number** field displays the sales transaction document number created when the item was sold to the customer. Click the link to view details of the original sales document.

5. Select existing customer information.
6. Enter the area that is serviced by your company, your office ID, and technician information. Enter a **Tech ID** or click the reassign button to select multiple technicians to work on the piece of equipment.

If technicians should be assigned based on certain skills and their availability at the time an actual service call is created, leave the **Tech ID** field blank.

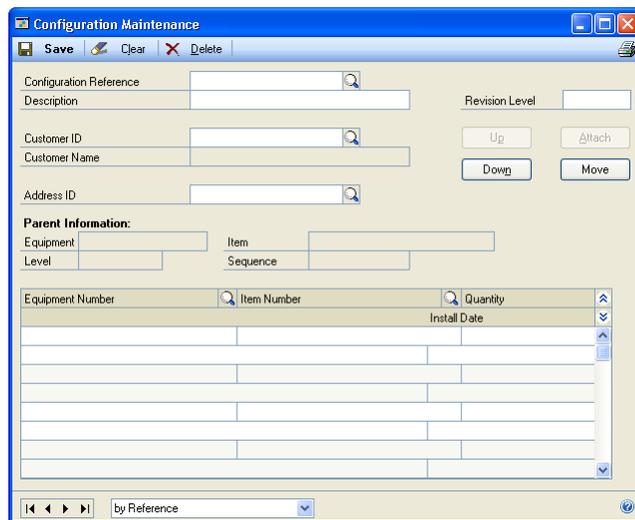
7. Enter or select the dates that the equipment was shipped, installed at the customer site, registered by the customer, last had preventive maintenance work performed on it, and last had service work performed on it.
8. Enter or select the vendor ID that the equipment originally was purchased from and the warranty code.
9. Enter or select the start and end date for the warranty on the piece of equipment.
10. Enter or select the seller warranty code, which represents the warranty your company offers after the manufacturer's warranty expires.
11. Enter or select the starting and ending dates for the seller's warranty.
12. Select an annual **PM Month** and **PM Day** to indicate the customer's preference for when preventive maintenance events are to be performed. This information is used as the default entries in the Equipment Maintenance window.
13. Click **ECOs** to view all engineering change orders for the equipment record.
14. Click **Configuration** to create, modify, or delete a unique configuration reference that represents a customer's system.
15. Click **Supersessions** to open the Supersession window to change an equipment number, item number, or reference ID, while still retaining historical data for the equipment record.
16. If the equipment is set up as a metered item, click **Meter Readings** to type the initial reading for up to five different meters.
17. Click **PM Schedules** to activate, select, or reset to the default settings and the preventive maintenance events for the record.

18. Click **PM History** to view the preventive maintenance requirements or past preventive maintenance events for the current record, and view meter information for metered items.
19. Click **Save**.

Set up item configurations

Configurations are used to track component parts that make up a customer’s equipment. You can create, modify, or delete a unique configuration reference that represents a customer’s system.

1. Open the Configuration Maintenance window.
Cards > Service Call Management > Configuration



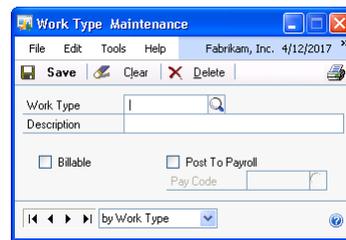
2. Enter or select a customer’s **Configuration Reference**, then enter a description.
3. Enter any additional information about the configuration in the **Revision Level** field. For example, if you are tracking a configuration for your customer’s software, you can enter the release of the software that the customer currently has installed.
4. Enter or select customer information.
5. Enter or select an equipment number and an item number.
6. Click **Add** to enter the appropriate item information.
7. Enter or accept the default quantity and installation date.
8. Define multiple levels within your configuration by placing your cursor on the line item to define components for. Click the **Up** or **Down** buttons to move a level in the configuration. The parent item information for the components within the level of the configuration you are viewing will appear in the middle of the window.

9. Move and attach configuration components from one configuration to another or from one configuration level to another by placing your cursor on the line item you want to move. Click **Move** to move to the level or configuration where you want to attach the component and click **Attach**.
10. Click **Save**.

Set up work types

A work type is a unique code used to represent the different types of labor performed on a service call. You can set up and customize an unlimited number of work types. The work type code is assigned during service call labor entry. The use of work types allows you to create reports to analyze labor within your service department.

1. Open the Work Type Maintenance window.
Cards > Service Call Management > Work Types



2. Enter a work type ID and description.
3. Select **Billable** if the work type activity should be billed to the customer.
4. Select **Post To Payroll** and select a pay code if the work type activity should be posted to Payroll. This option is not available if the **Payroll Integration** field is set to **None** in the Service Setup window.

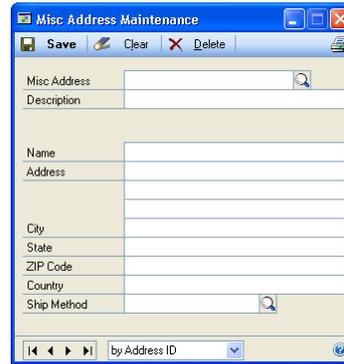
This information will be displayed on the Tech Labor report (**Reports > Service Call Management > Technician Labor**). If a line's work type has the **Post to Payroll** check box selected, a P is displayed in the PY column. The total of payroll hours is shown for each technician, and the grand total of hours posted to Payroll is displayed at the end of the report.

5. Click **Save**.

Set up miscellaneous addresses

Miscellaneous addresses represent alternate ship-to locations for parts that are needed to repair equipment in Service Call Management. You can set up and maintain an unlimited number of miscellaneous addresses.

1. Open the Misc Address Maintenance window.
Cards > Service Call Management > Misc. Address

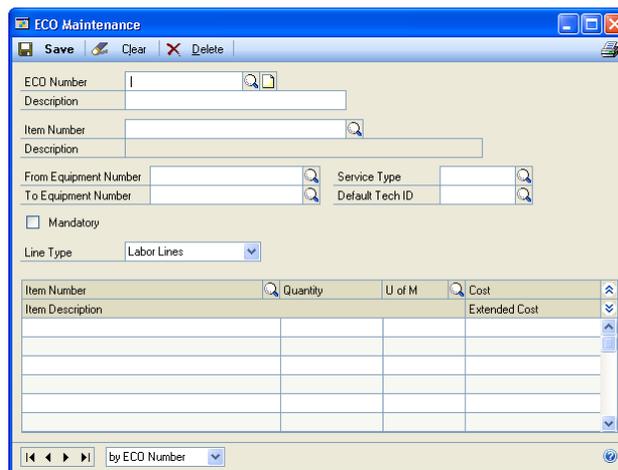


2. Enter a miscellaneous address and ID.
3. Enter the name and address information for the record.
4. Specify the **Shipping Method** to be used as the default method for the miscellaneous address.
5. Click **Save**.

Set up engineered change orders

You can create codes for engineered change orders (ECOs). ECOs can be used if a vendor requires work to be completed on an item, such as an upgrade or the replacement of a defective part. ECO generation creates service calls for the specified range of items, customers, or equipment numbers.

1. Open the ECO Maintenance window.
Cards > Service Call Management > ECO



2. Enter an ECO number and description.

3. Select the item number that the ECO is generated for. Enter a range restriction to specify which equipment numbers should have service calls created under the engineered change order.
4. Enter or select a service type, which is the default entry on service calls that are generated for the ECO.
5. Enter or select the technician who is completing the ECO service calls. If the **Tech ID** field is left blank on the ECO Maintenance card, a technician is assigned automatically or may be manually assigned to each service call.
6. Specify default parts, labor, and expense lines for each ECO.

For each line type selected, enter or select the item number, quantity, and unit of measure. The items specified appear on the service call within the labor, parts, and miscellaneous charges windows when an ECO call is generated.

If you add a kit item to a parts line, the generated ECO call will include the kit components.

7. Click **Save**.

Set up Extended Pricing

If you have enabled Extended Pricing, all other pricing is disabled. You can use only one pricing system at a time. You can use the Service Price Level Maintenance window to establish Extended Pricing for labor transactions used within Service Call Management.

The price level you set up should be assigned to the technicians in the Technician Maintenance window.

When a labor line is entered on a service call, the percentage, from the appropriate price level, is multiplied by the labor item price to calculate the extended price for labor items on the service call.

1. Open the Service Price Level Maintenance window.
Cards > Service Call Management > Technicians > select a technician > Price Level expansion button

| Return Price Level | |
|-----------------------|---------|
| Standard Time Percent | 100.00% |
| Overtime Percent | 100.00% |
| Doubletime Percent | 100.00% |
| Hotline Percent | 100.00% |
| Travel Percent | 100.00% |

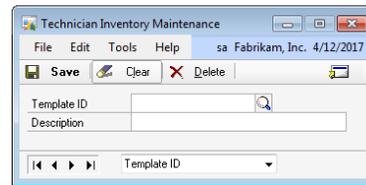
2. Enter or select a price level for a specific technician or a group of technicians.
3. Enter a percentage for each of the five types of labor supported in Service Call Management.

4. Click **Save**.

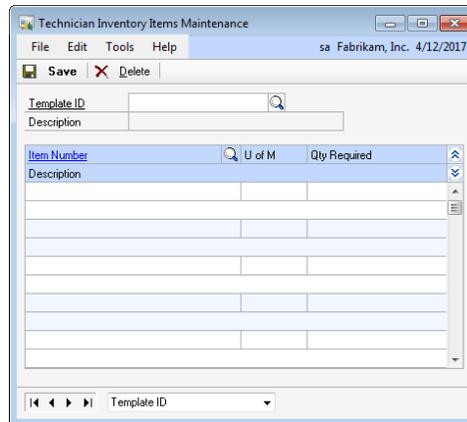
Set up technician inventory item templates

Set up inventory templates to provide a list of the items and stock levels that are typically used for your technicians and their warehouses. Re-order points can be assigned to each item and warehouse which helps keep the item stocked in the appropriate location. After your templates are set up, assign a technician to them and transfer the inventory using the Technician Inventory Stock/Replenish window.

1. Open the Technician Inventory Maintenance window.
Cards > Service Call Management > Tech Inventory



2. Enter a Template ID and description.
3. Click **Go To** and select Technician Inventory Item. The Technician Inventory Items Maintenance window opens.



4. Enter the item number, U of M and quantity required for each item that will be included in the template.
5. Click **Save**.

Chapter 3: Set up the SQL Mail Process Server

The SQL Mail Process Server within Service Call Management allows you to use e-mail messages to request open service calls and history service calls, perform keyword searches, enter new service calls, and submit service call time sheets.

You also can use the SQL Mail Process Server to send pages to mobile devices for remote or dispatched technicians.

The SQL Mail Process Server is set up by a user with system administrator rights or by the SQL server administrator. Refer to your Microsoft SQL Server® documentation and Exchange server documentation for updated information.



For paging, a third-party paging product or service provider is required before page messages can be sent.

This information is divided into the following sections:

- [Create a mailbox profile for Microsoft SQL Server](#)
- [Use the profile with the MSSQLServer service](#)
- [Connect SQL Mail and the mail profile](#)
- [Create a job and schedule for SQL Mail](#)

Create a mailbox profile for Microsoft SQL Server

You must establish a connection between the SQL Mail processor on a SQL server and Microsoft Exchange to send and receive messages. To enable this functionality, you need to create a mailbox profile for SQL Server to use.

1. Create a domain user account on the Exchange server. If you are unfamiliar with this process, see the appropriate Microsoft Exchange documentation.
2. Create a profile (mailbox) for the domain user account.
Start > Control Panel > Mail

Use the profile with the MSSQLServer service

Once you have created a mailbox profile for the SQL Mail Process Server to use, you need to be sure the profile is used by SQL Server. Set the profile you created as the default logon account used by the MSSQLServer service. Complete the following procedure to use the mailbox profile with the MSSQLServer service.

1. Open the Services window.
Start > Administrative Tools > Services
2. Right-click the **MSSQLSERVER** service and click **Properties**.
3. Click the **Log On** tab.
4. Select **This account**.
5. Type the domain user account and password information.
(domain\username)

6. Click **OK**.
7. Restart the **MSSQLSERVER** service.

Connect SQL Mail and the mail profile

The final connection you need to make is between SQL Mail and the mail profile. Once you have set up the profile and specified the profile for the **MSSQLSERVER** service, you can establish a connection between the mailbox and the SQL Mail Process Server. Complete the following steps to allow the mail processor to scan the Inbox for requests.

1. Open SQL Server Enterprise Manager.
Start > Programs > Microsoft SQL Server > Enterprise Manager
2. Expand **Microsoft SQL Servers**.
3. Choose the **SQL Server group** that contains your SQL server.
4. Expand your **SQL server**.
5. Expand the **Support Services** folder.
6. Right-click **SQL Mail** and click **Properties**.
7. In the SQL Mail Configuration window, type or select the profile you created and click **Test**.
8. Click **OK**.

Create a job and schedule for SQL Mail

To allow SQL Server to scan for mail without manual operation, you need to set up a job and create a schedule for the job. SQL server uses the instructions to periodically scan the profile's inbox for new, unread messages. Complete the following procedure to create a job to scan the mailbox.

1. Open SQL Server Enterprise Manager.
Start > Programs > Microsoft SQL Server > Enterprise Manager
2. Expand **Microsoft SQL Servers**.
3. Choose the **SQL Server group** that contains your SQL server.
4. Expand your **SQL server**.
5. Expand the **Management** folder.
6. Expand the **SQL Server Agent** object.
7. Right-click **Jobs** and select **New Job...**
8. When the New Job Properties window opens, type a name for the new job, such as Mail Scanner.
9. Enter **sa** for the **Owner**. Entering a description is optional.

10. Click the **Steps** tab and then click **New**.
11. In the New Job Step window, type a name for the step, such as Mail Scanner. Be sure the **Type** list shows **Transact-SQL Script (TSQL)**. Type the name of the database you want the job to apply to, such as, TWO. In the **Command** box, type the following SQL instructions:
exec SVC_MailScanner.
12. Click **Apply**, then **OK**.



You must edit the SVC_MailScanner stored procedure to contain the proper password for the SQL Server System Administrator, or sa, account (select @BCP_Password ="). Failure to set the password properly will prevent the SQL Mail Process Server from functioning.

13. Click the **Schedules** tab and then click **New Schedule**.
14. When the New Job Schedule window opens, type a name for the new schedule, such as **Mail Scanner**. Click **Change** to open the Edit Recurring Job Schedule window and modify the scanning frequency. Make the necessary schedule adjustments and click **OK**.
15. Click **OK** to close the New Job Schedule window.
16. Click **Apply**
17. Click **OK**.

Part 2: Transaction activity

Use the procedures described in this part of the documentation as a step-by-step guide for entering and updating service calls within Service Call Management.

The following topics are discussed:

- [Chapter 4, "Routine procedures,"](#) describes how to create quotes and service calls, dispatch technicians, enter parts and labor information, and complete service calls.
- [Chapter 5, "Posting,"](#) explains how to generate service call bills and ship service inventory transfers.
- [Chapter 6, "Maintenance procedures,"](#) describes processes like reconciling service inventory quantities and removing service call history.
- [Chapter 7, "Reconciling procedures,"](#) explains how to reconcile your service call parts inventory and how to remove nonessential history.

Chapter 4: Routine procedures

Being able to enter and track technician communication transactions is an essential part of field service. When technicians are dispatched or paged, service tickets are updated with details such as parts and labor usage.

The Service Call Entry/Update window is like a printed service ticket, with information about customers, equipment, parts, labor, additional charge, miscellaneous charge, and service ticket totals. You can enter and save quotes and service calls using the this window.

Eliminate duplicate entry of similar documents by transferring one type of document to another.

This information is divided into the following topics:

- [Enter a new service call](#)
- [Enter a quote](#)
- [Price levels for service calls](#)
- [Tax schedules for service calls](#)
- [Service call to contract linking](#)
- [Assign technicians](#)
- [Reassign technicians](#)
- [Dispatch service calls](#)
- [Determine price levels for service call parts](#)
- [Service call parts return line details](#)
- [Service call parts kit line details](#)
- [Enter parts](#)
- [Determine price levels for service call labor items](#)
- [Enter labor](#)
- [Enter additional charges](#)
- [Enter expenses](#)
- [Complete service tasks](#)
- [Complete a service call](#)
- [Enter or view indirect labor](#)
- [Generate engineered change orders \(ECOs\)](#)
- [Replenish technician inventory](#)

Enter a new service call

Service call documents are used when a customer calls to request service for equipment problems, repairs, preventive maintenance, and so on. You must enter a call number, the customer's ID and time zone, the call status code, and the entry date and time. You can designate a default entry for many of these required fields.

You can include parts from inventory on a service call, as well as selected non-saleable items, such as labor, travel time, or mileage. Your company's cost and the price to the customer are calculated automatically.

To attach more than one equipment record to a single service call, select the **Allow Multiple Equipment** option in the Service Setup – Service window. (Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > Service button)

If a technician is not assigned to the service type, customer extension, or equipment record automatically, assign one or more manually using the Tech Assignment window. For more information, see [Assign technicians](#) on page 58.

Service history is kept for only the primary equipment number entered in the Service Call Entry/Update window. **MTBF (Mean Time Between Failure)** and **MTTR (Mean Time to Repair)** reporting can be performed on only that primary equipment number.

To update or select the primary equipment number in the Service Call Entry/Update window, select an equipment number in the Service Entry – Equipment window and click **Select**. This selection allows you to enter a different problem, cause, and repair code for each equipment number that is attached to the service call.

To determine repair code ratios to problem codes, you can perform problem analysis by printing reports.

1. In the navigation pane, choose the **Field Service** button, and then choose the **Service Call Transactions** list.
2. Choose the **Service Call** button to display the Service Call Entry/Update window.

The screenshot shows the 'Service Call Entry/Update' window with the following data:

| Equipment Information: | | Date/Time: | |
|---------------------------------------|-------------------------------|---------------------------------|-------------|
| Equipment Number | Reference | TimeZone | Base |
| 22072103 | 3284-103 | CST | EST |
| Item Number: 2A3284A | Description: Dual Core Server | Entry: 8/16/2008 3:54:00 PM | 4:54:00 PM |
| Contract #: 0000002020 | Contract Type: | Response: 8/18/2008 3:54:00 PM | 4:54:00 PM |
| Start / End Date: 0/0/0000 / 0/0/0000 | Problem: | E.T.A...: 8/16/2008 3:54:00 PM | 4:54:00 PM |
| | Cause: | Dispatch...: | 12:00:00 AM |
| | Repair: | Arrival...: | 12:00:00 AM |
| | Service Area: CENTRAL | Complete...: | 12:00:00 AM |
| | Office ID: C01 | Contact: Farjad Namour | |
| | Tech ID: T0102 | Phone: (314) 555-0185 Ext. 0000 | |
| | Terms ID: Net 30 | Address: 3456 N. Jupiter St | |
| | Currency ID: Z-US\$ | City: St Louis | |
| | | State: MO | |
| | | ZIP Code: 63156-3427 | |
| | | Country: USA | |

3. Select **Open** as the document type and click **New**.
4. Enter or accept the default service type. For more information, see [Set up service types](#) on page 12.
5. Enter or select the customer ID. Customer information is displayed.
6. Enter a brief explanation of the problem that generated the service call in the **General Description** field.

7. Enter or select an equipment number or enter or select the item number that matches the item that needs to be repaired.
8. Enter or select the codes that describe the problems encountered for the serviced equipment or item. Information entered in the code fields can be useful in solving future service calls.
9. Enter or select the service area where the customer is located and the office where the customer is serviced.
10. Click **Page** (the third icon to the right of the **Tech ID** field) to send an e-mail or page the technicians assigned to the service call. Edit the pager message, then click **Send** to generate a page using third-party paging software, if available.
11. Enter and track dispatch, estimated time of arrival, arrival, response, and completion times.

Enter the date and time fields to correspond with the user date and system time automatically, based on the current time zone.

12. Enter or change the contact information.
13. Click **Parts** to order and track parts that are to be used on a service call. For more information, see [Enter parts](#) on page 65.
14. Click **Labor** to enter travel and labor time for a service call. For more information, see [Enter labor](#) on page 68.
15. Click **Additional Charges** to enter any additional charges for parts that cannot be classified as parts, labor, or expenses. For more information, see [Enter additional charges](#) on page 70.
16. Click **Expenses** to enter each technician's expenses related to the service call. For more information, see [Enter expenses](#) on page 71.
17. Click **Hotline** to enter the details of a telephone support call.

The text entered in the Hotline Entry window also is appended to the service call's header notes. To view the note, click the **Notes** button attached to the service call number.

Click **Post** to update the end date and time with the user date and system time.

18. Click **Meters** to enter meter readings for the piece of equipment. The **Meters** button is available if the equipment being serviced is designated as a metered item in the Item Extensions window.

The **Current** field represents the new meter reading. The **Internal Use** field represents the meter "clicks" that were used by a technician during the service call repair process. The internal use reading doesn't affect any meter calculations, such as the daily usage or contract meter billing. Click **OK** to update the meter readings on the equipment maintenance record.

If a meter was replaced during the service call repair process, select **Replaced**. This step is necessary to enter a meter reading that's lower than the previous entry for the piece of equipment. Click **OK** to return to the Service Call Entry/Update window.

19. Click **Invoice** to view invoice and return information for an invoiced service call.
20. Click **Totals** to preview costs, sales tax amounts, and prices incurred on the service call.
21. Save, print, or transfer the service call to another service call, a quote, or to history.

Before transferring a service call, the appropriate transfer options must be selected for the type of document you are transferring to. For more information, see [Transfer quotes or service calls](#) on page 83 and [Transfer service calls to history](#) on page 84.

Enter a quote

Customers often request an estimate, or quote, for the cost of servicing an item before they decide to purchase. You can include items from inventory on a quote, as well as items that do not track inventory quantities. Your cost and price to the customer are calculated automatically, enabling you to estimate the profitability of the potential service call.

Service quotes are not active service calls; they are either transferred to an open service call or deleted. If the customer decides to purchase services based on the quoted terms, you can transfer the quote to an open service call. If the customer decides not to purchase the service from your company, the quote remains available until you delete it or transfer it to history.

1. Open the Service Call Entry/Update window.
Transactions > Service Call Management > Service Calls
2. Select **Quote** as the document type and click **New**.
3. Enter service call information to include in the quote. For more information, see [Enter a new service call](#) on page 53.
4. Click **Totals** to preview costs, tax amounts, and prices on the quote.
5. Save, print, or transfer the quote to a service call, another quote, or to history.

Before transferring a quote, the appropriate transfer options must be selected for the type of document you are transferring to. For more information, see [Transfer quotes or service calls](#) on page 83.

Price levels for service calls

Price levels are codes used to affect the price of items sold to customers. You can assign price levels to customers, items, technicians, Receivables Management, and Service Call Management. Price level information specified for the customer, Service Call Management, and Receivables Management are used for the header of service call documents. Price levels are determined automatically during service call entry by checking for price level information in these windows in the order of appearance.

- Customer Maintenance window
- Service Setup – Service window
- Receivables Management Setup window



If no price level is entered for any of the three locations, then no price level is assigned to the service call header. You must select a price level before entering items on any service call lines window (parts, labor, expenses, additional charges).

When a new service call is created, Service Call Management determines the price level and assigns the price level to the service call header. The price level assigned to the service call header applies to items on part, expense, and additional charge lines. Labor line items check the price level of the technician before checking the service call header. For more information, see [Determine price levels for service call labor items](#) on page 67.

Tax schedules for service calls

You can assign tax schedules to customers and items for use with Service Call Management. Tax schedules are assigned automatically during service call entry, but can be changed. The tax schedule assigned to the service call is determined according to the following list. The windows are checked in the following order.

- Customer Maintenance window
- Item Maintenance window

Each item has tax options. You can select a tax option to specify whether the item is taxed, and on what basis the taxing follows. The options are described in the following table.

| Tax Option | Description |
|------------------|--|
| Taxable | Enter or select a schedule in the Tax Schedule ID field for the item. |
| Nontaxable | The item will not be taxed. |
| Base on Customer | Either the customer tax schedule or the site tax schedule is applied, depending on whether the shipping method is delivery or pickup. The shipping method determines where the exchange of goods takes place and also which tax schedule is used. If the shipping method is delivery, the tax schedule entered for the customer shipping address is used. If the shipping method is pickup, the tax schedule entered for the "selling" site is used. |

If you're using Inventory Control and you select **Taxable**, taxes are calculated using the schedules described in the following table.

| Shipping method | Taxing description |
|-----------------|---|
| Delivery | The customer tax schedule is compared to the item tax schedule. |
| Pickup | The site tax schedule is compared to the item tax schedule. |

If you're not using Inventory Control and you select **Taxable**, taxes are calculated using the schedules described in the following table.

| Shipping method | Taxing description |
|-----------------|---|
| Delivery | The customer tax schedule is compared to the item tax schedule. |
| Pickup | The company tax schedule is compared to the item tax schedule. |

For more information, see the System Setup manual.

Service call to contract linking

When Contract Administration is integrated with Service Call Management, you can manage the number of service calls as customer requests. If a contract exists when an item is entered on a service call, the contract number and the contract type is displayed on the service call automatically.

Contract information, such as the Priority and Service Type, will be shown in the appropriate fields on the service call record.

Assign technicians

Technicians can be assigned to service calls automatically or manually. They are assigned based on the entries made during setup. Technicians are assigned to a service call automatically if any IDs are specified in the **Tech ID** field of one of the following windows:

- Service Type Maintenance
- Customer Extensions
- Equipment Maintenance



If no ID is found in any of the windows, you can assign technicians manually.

You can assign technicians manually in the following windows:

- Service Call Entry/Update
- Tech Assignment
- Service Call Dispatch

Assign a technician in the Service Call Entry/Update window

1. Open the Service Call Entry/Update window.
Transactions > Service Call Management > Service Calls
2. Select **Open** in the **Record Type** list.
3. Enter or select a service call number.

- Click **OK** to assign the technicians to the service call and close the window.

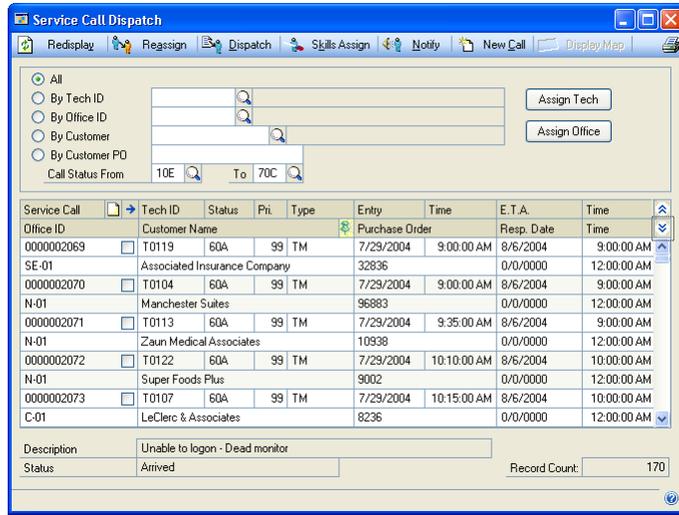


If you assigned more than one technician to this service call, an icon appears next to the Tech ID field, indicating that multiple technicians are assigned to this service call.

- Click **Save**.

Assign a technician in the Service Call Dispatch window

- Open the Service Call Dispatch window.
Transactions > Service Call Management > Service Call Dispatch



- Select an option to sort information by. If you select an option other than **All**, you must make a corresponding entry in the field to the right of the option.
- Enter or select a technician ID.
- Select a service call in the scrolling list.
- Click **Assign Tech**. You can assign more than one technician to a service call by using the **Skills Assign** button.



If you assigned more than one technician to this service call, an icon appears next to the Tech ID field, indicating that multiple technicians are assigned to this service call.

Reassign technicians

You can change the technician assigned to a service call using one of four windows: Service Call Entry/Update, Tech Assignment, Reassign Service Call, and Reassign Technician.

Reassign technicians in the Service Call Entry/Update window

- Open the Service Call Entry/Update window.
Transactions > Service Call Management > Service Calls
- Select **Open** in the **Record Type** list.

3. Enter or select a service call number.
4. Enter or select a new technician ID.



*You can assign additional technicians to the service call in the Tech Assignment window (click the **Reassign** icon button, next to the **Tech ID** field).*

5. Click **Save**.

Reassign technicians in the Tech Assignment window

1. Open the Service Call Entry /Update window.
Transactions > Service Call Management > Service Calls
2. Select **Open** in the **Record Type** list.
3. Enter or select a service call number.
4. Click **Reassign** (the icon to the right of the **Tech ID** field).



5. Select one or more technicians from the scrolling list.
6. Click **OK** to assign the technicians to the service call.

Reassign technicians in the Reassign Service Call window

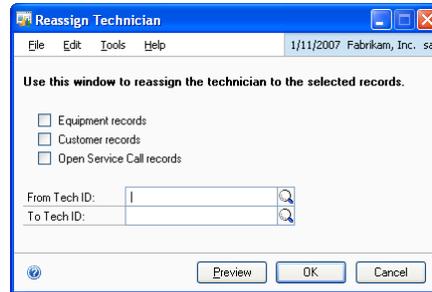
1. Open the Service Call Dispatch window.
Transactions > Service Call Management > Service Call Dispatch
2. Select a service call in the scrolling list.
3. Click **Reassign**.



4. Enter or select the technician you are reassigning the call from and enter or select the technician you are reassigning the call to.
5. Select a reassignment option. If you select **All**, all open service calls for the technician you are reassigning the call from are reassigned to the technician you choose. If you select **This Call**, only the selected call is reassigned.
6. Click **OK**.

Reassign technicians in the Reassign Technician window

1. Open the Reassign Technician window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Reassign Technician



2. Select which types of records to include.
3. Enter or select the technician to reassign service calls from.
4. Enter or select the technician to reassign service calls to.
5. Click **Preview** to view or print a report of the records affected by the reassignment.
6. Click **OK**.

Dispatch service calls

You can dispatch service calls, view a list of open service calls, and help assign or reassign calls to technicians.

1. Open the Service Call Dispatch window.
Transactions > Service Call Management > Service Call Dispatch
2. When viewing open calls, specify how the information should be displayed by selecting **All** or other options. When you select an option other than **All**, you must make a corresponding entry in the field to the right of the selected option.



*The Call Status range offers additional filtering for only **All**, **By Tech ID**, and **By Office ID** options. The **By Customer** and **By Customer PO** options will display all open service calls for the specified data entered in the field next to the selected option.*

3. Click **Reassign** to change the technician currently assigned to a service call. Then enter the ID of the technician you're reassigning the call to. You can reassign all the calls for a selected technician by selecting **All**.
4. Click **Skills Assign** to assign service calls to technicians based on who works in the appropriate service area and who has the required parts.
5. Click **Notify** to indicate that the technician has been notified. Clicking this button does not actually notify the technician, but serves as a visual reminder to the dispatcher that the technician has been notified.
6. Click **New Call** to enter a new service call.

7. Click **Display Map** to access mapping software, such as Microsoft MapPoint (if available), to show the location of technicians and customers and the shortest route between locations. You can define the map software location in the Service Setup – Add-on Products window.
8. Click **Dispatch** to update the call status and the dispatch date and time to reflect the current date and time.

Determine price levels for service call parts

The service call header default price level is used when calculating the price of a service call parts line.

When you enter a service call parts line item, the selling unit of measure set up in the Item Pricing Maintenance window will appear as the default unit of measure.

The price level assigned to service call part lines is determined according to the following schedule:

- Service Call header
- Customer Maintenance window
- Item Maintenance window
- Receivables Management Setup window

Once a price level has been determined for the parts line and that price level exists on the item's price schedule, but is not assigned to the selling unit of measure, the **Unit of Measure** field is blank and the focus is on the field. Enter a unit of measure that can be used with the price level assigned to the parts line. The price level and the selling unit of measure are used to determine the price for the item.

Service call parts return line details

You can sell and return items on a service call in the Service Call Entry – Parts window. Return lines are automatically created for the returning item; they are designated with the letter "R" in the first column of the table. General ledger entries are created automatically for the affected accounts. Any return item cost information that is available for the item is used also.



The item must be selected as "returnable" in the Item Extensions window.

General ledger account information

When the quantity sold on the return (R) line of a service call is changed from zero to a positive number, which indicates that inventory is returned to a site, an inventory adjustment journal is created and posted. The inventory journal updates the following general ledger accounts.

| Account | Debit | Credit | Description |
|--------------------|--------|--------|---|
| Inventory | 100.00 | | From Item master table; if empty, from Posting accounts |
| Cost of Goods Sold | | 100.00 | From Item master table; if empty, from Posting accounts |

Compare this to a positive number for the quantity sold on an installable (I) or consumable (C) parts line, which indicates that inventory is taken out of a site. In this case, the inventory journal updates the following general ledger accounts. The WIP and COGs accounts are updated when the sales invoice that results from the service billing process is posted.

| Account | Debit | Credit | Description |
|-----------------------------|--------|--------|---|
| Inventory | | 100.00 | From Item master table; if empty, from Posting accounts |
| Work In Process (Drop-Ship) | 100.00 | | From Item master table; if empty, from Posting accounts |

When the quantity sold for any parts line (I, C, or R) of a service call is changed from a positive number to zero, the inventory transaction is reversed.

When the service call for a return line is billed, a Sales Order Processing (SOP) credit is created. The credit voucher is selected as a drop ship to suppress inventory adjustments. This selection allows immediate receiving and processing, rather than waiting for SOP posting to occur. Posting the SOP credit document updates the following accounts.

| Account | Debit | Credit | Description |
|---------------------|--------|--------|--|
| Part Sales Return | 100.00 | | From Return Item master table; if empty, from Posting accounts |
| Accounts Receivable | | 100.00 | From Item master table; if empty, from Posting accounts |



This table is based on the Posting Accounts From option (Item or Customer) selected in the Sales Order Processing Setup window (Microsoft Dynamics GP menu > Tools > Setup > Sales > Sales Order Processing).

Return cost information

When creating an Return Materials Authorization (RMA) document from a service call, Service Call Management uses the return item cost set up in the Item Extensions window for both the return line and the RMA returned item cost. The returned item cost also appears on the Inventory Adjustment posting.

Service call parts kit line details

You can add kit items to parts lines for a service call in the Service Call Entry – Kits window. Kit components are added to the service line table; they are designated with the letter “K” in the item use type field. A component line sequence number

tracks the sequence of the kit components. The kit item has a component sequence of 0. All the kit components share the line item sequence of the kit item. A kit component can have an item use type of C, I, R, or M. You can change the quantity ordered for each kit component, and you can add or delete components.

If necessary, you can create a purchase order for kit item or kit components for a service call by using the Create PO window.

If a service call is generated from an engineered change order (ECO) that includes a kit item, the kit items and components are taken from the item record in the Item Kit Maintenance window.

Allocation quantities

By default, the quantity allocated for components that have an item type of Misc. Charges, Services, or Flat Fee is the same as the ordered quantity for the kit. For item types of Sales Inventory and Discontinued, the quantity allocated for the components is the ordered quantity multiplied by the quantity on the component line. For example, if a kit contains four table legs and the quantity ordered is three, the quantity for the components is 12. The kit item's quantity allocated is based on the allocation of the components. In the previous example, if twelve table legs are allocated, then three complete kits are allocated. If only 11 table legs are allocated, then only two kits are allocated.

General ledger account information

When a service call that includes a kit item is billed, the Cost of Goods Sold account is updated. The selection for the Cost of Goods Sold account in the Item Kit Maintenance window determines whether the accounts come from the kit item or from the kit component.

If **From Component Item** is selected in the Item Kit Maintenance window, the Cost of Goods Sold accounts come from the kit components. If **From Kit Item** is selected, the Cost of Goods Sold account comes from the kit item.

Enter parts

You can enter the parts to be used for repairing or servicing a piece of equipment on a service call.

Transaction amounts on a service call are distributed automatically to the posting accounts assigned to the Service Type, the Item Maintenance, or the Posting Accounts Setup windows.

If a technician is not specified on the service call, the site is the default of the site ID assigned to the office ID on the service call.

If sufficient inventory is available in the selected site for the part ordered, the quantity allocated is automatically set as equal to the number of parts that are available, up to the quantity ordered. After these units have been allocated, they are no longer available for use elsewhere in the system.

If you're using Returns Management, a Return Material Authorization (RMA) document is created automatically when the quantity sold is entered on the returnable line item.

When the quantity sold on a consumable line item or installable line item of a service call is updated, an inventory decrease adjustment is created and posted. When the quantity sold on the returnable line item of a service call is updated, an inventory increase adjustment is created and posted.

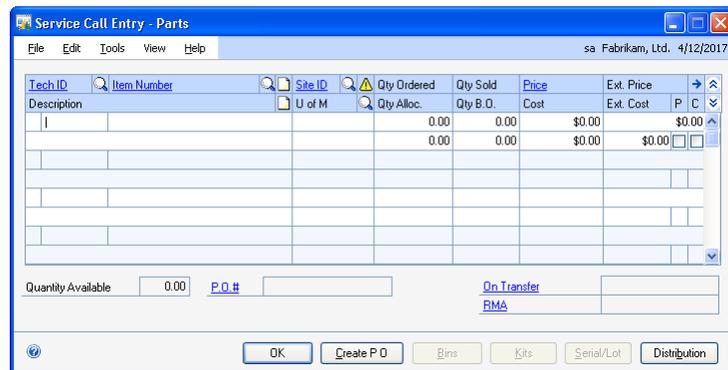
The **Quantity Back Ordered** field displays the difference between the quantity ordered and the quantity allocated if the parts are not available at the site selected on the service call parts line.

The default price for an item is based on the item’s price schedule, the currency ID selected on the service call and the price level on the service call header.

The **Extended Price** field displays the unit price multiplied by the quantity sold multiplied by the billable percentage on a consumable line item or installable line item. The extended price is the amount the customer is responsible for paying, before applicable taxes. The extended price on an returnable line item is the amount the customer is issued a credit for, before applicable taxes.

If sufficient quantities of a part aren’t available for completing a service call, there are several ways that the shortage can be filled. If there is a quantity back ordered on the part line, you can use the Inventory Requirements window to either generate an inventory transfer or a vendor purchase order.

1. Open the Service Call Entry – Parts window.
Transactions > Service Call Management > Service Calls > Parts button



2. Enter or select the item number of the parts needed on the service call. Enter or select the **Tech ID** associated with the **Item Number**. One of the following types is displayed to the left of the **Item Number**.

I (Installable) A part that is removed from the customer site and replaced with a new part. The installable line item represents the newly installed item and always will create a corresponding returnable line item.

R (Returnable) A defective part that is brought back into the bad stock warehouse. This item generates an RMA when a quantity sold is entered for the returnable item, if integrated with Returns Management.

C (Consumable) A consumable part that is used at the customer site and has no corresponding return item. For example, small parts such as washers that are used to repair equipment rarely have enough value to justify their return, so they are discarded when replaced.

K (Kit) A kit item that is used as a part. The kit components are indicated as installable, returnable, or consumable in the Service Parts – Kit Components window.

N (Non-Inventoried) An item that is not tracked in inventory and that is used as a part. You can use non-inventoried items as parts only if the **Allow Non-Inventoried Items** check box is selected in the Service Setup window.

The type of parts line item is determined by the settings in the Item Extension record. For more information, see [Set up item extensions](#) on page 37.



The item lookup window shows all inventoried items but only Sales Inventory, Discontinued, and Kit item types can be used in the Service Call Entry – Parts window.

3. Click the **Site ID** expansion button to select a location or accept the default location.
4. Enter the quantity of the part that is needed to complete the service call in the **Quantity Ordered** field.
5. Enter the quantity of parts actually used to complete the service call. The quantity sold cannot be greater than the quantity allocated.
6. Enter the quantity sold for an item with a serial or lot number, then click **Serial/Lot** to enter or select the specific serial or lot numbers for the parts transactions.
7. If your company uses bins, click **Bins** to select quantities from various bin locations, up to the extended quantity selected on the service call parts line. The **Bins** button is not available if the selected part is a kit item.
8. If the selected part is a kit item, click **Kits** to view or change quantities for the kit components.
9. Click the **Extended Price** expansion button to view or modify the price level and billable percentage for the selected item.
10. To skip the Inventory Requirements window and simply generate a purchase order for the shortage, select the **P** (Create PO) check box and click the **Create PO** button. Then select the vendor to order the item from and generate a purchase order that is attached directly to the service call parts line. The **Create PO** button is not available if the selected part is a kit item. You can use the **Bins** button in the Service Parts – Kit Components window to create a purchase order for kit components.
11. To change distributions for unposted parts distributions, click **Distributions**.
12. Click **OK**.

Determine price levels for service call labor items

Service call labor line pricing is slightly different than service call parts line pricing. The price level assigned to service call labor lines is determined according to the following schedule. The windows are checked in the following order.

- Technician Maintenance window
- Service Call Entry/Update window

- Customer Maintenance window
- Item Maintenance window
- Receivables Management Setup window

Technicians

Each technician can be assigned a different price level based on the position. The result is that all labor lines entered for a technician have the same price level.

Items

Item numbers used on service call labor lines are specified in the Service Type Maintenance window. You can enter an item number for standard labor, overtime labor, double time labor, travel labor, and hotline support labor for each service type. Standard labor, overtime labor, and travel labor can be created automatically or manually. Only double time labor and hotline labor can be entered manually.



All price levels and selling units of measure should be assigned to the price schedule of each specified labor item.

| Default Labor Items: | | Minimum | Rounded |
|----------------------|------------|---------|---------|
| Standard | 5-STDLABOR | 000.00 | 000.00 |
| Overtime | 5-OVTLABOR | | |
| DoubleTime | 5-DBLLABOR | | |
| Travel | 5-TVLLABOR | 000.00 | 000.00 |
| Hotline | 5-HOTLINE | 000.00 | 000.00 |

Once a price level has been determined for the labor item, the price level and the selling unit of measure are used to determine the price for the labor item.



The default unit of measure for labor items is the selling unit of measure set up for the item in the Item Pricing Maintenance window.

Enter labor

Labor items can be entered on a service call in three ways. You can select to create labor lines automatically once the arrival and completion times are entered.

The second way is to open the Service Entry – Time window next to the **Arrival Time** field, where you can enter travel or regular labor hours for technicians.

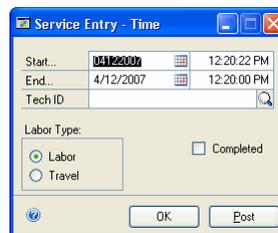
The third way to enter labor on a service call is to use the Service Call Entry – Labor window, where you can enter and track the time a technician spends on a service call. Labor for multiple technicians can be entered against one service call. The labor item number determines how the time spent is billed.



If payroll integration is activated in the Service Setup window, the labor information can be posted to Payroll.

Enter labor in the Service Entry – Time window

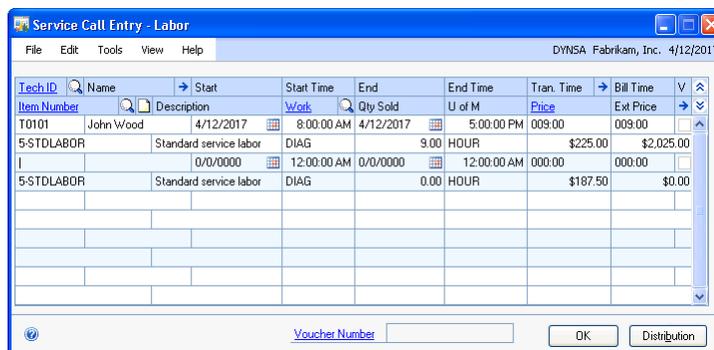
1. Open the Service Entry – Time window.
Transactions > Service Call Management > Service Calls > i button to the right of the arrival time field



2. Enter the starting and ending date and time for the labor record in 24-hour format.
3. Enter or select the ID of the technician who performed the work.
4. Select the type of labor the technician performed. The labor type determines which labor item is used when creating the labor entry.
5. Select the **Completed** option to enter the ending date and time from the labor entry automatically as the date and time the service was completed and change the service call status to completed.
6. Click **Post**.

Enter labor in the Service Call Entry – Labor window

1. Open the Service Call Entry – Labor window.
Transactions > Service Call Management > Service Calls > Labor button



2. Enter or select the technician to create a labor record for. If a technician is assigned to the service call, the tech ID and name will display automatically for each labor line that is added.
3. Click the **Name** expansion button to track vehicle mileage for a travel labor record.
4. Enter the starting and ending date and time for the labor record in 24-hour format.

5. Enter or accept the default starting and ending dates.
6. Enter or accept the default item number to enter the labor for the service call.
7. Enter the work type that best defines the activity the technician performed for the labor record if you want to print detailed labor reports.

Click the Tran. Time expansion button to view or modify the payroll

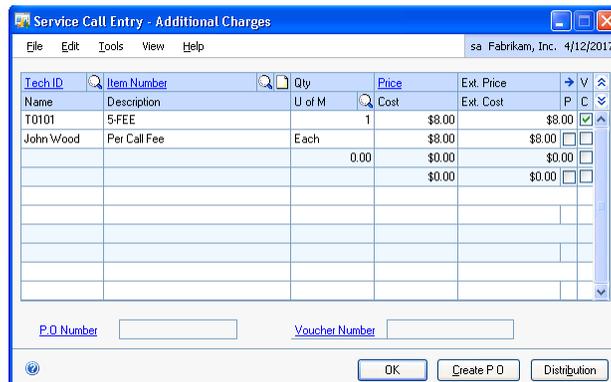
8. Enter the quantity of the labor item that was sold, which will post as the quantity sold in Sales Order Processing when the service call is billed. The default entry in the **Quantity Sold** field is the amount of time between the start date and time and the end date and time.
9. Click the **Extended Price** expansion button to view or modify the price level and billable percentage for the additional charge item. The default price for an item is based on the item's price schedule, currency ID, price level, and the billable percentage.
10. To indicate a subcontractor labor charge, select the **V (Create Voucher)** check box. During service call billing, a voucher will be generated in Payables Management for this charge.
11. If Payroll integration is activated, save the line item. Click the **Tran. Time** expansion button to view or modify the payroll information that will be used to generate transactions when labor information is posted to Payroll.
12. Click **Distributions** to change distributions for unposted distributions.

Enter additional charges

You can enter any additional charges that cannot be classified as parts, labor, or expenses, but do need to be applied to the service call.

Transaction amounts on a service call are distributed automatically to the posting accounts assigned to the Service Type, the Item Master, or the Posting Accounts setup.

1. Open the Service Call Entry – Additional Charges window.
Transactions > Service Call Management > Service Calls > Add'l Charges button



2. Enter or select the item number of the additional charge.



*The Inventory Item Lookup window shows all inventory items but only **Services, Flat Fee, and Miscellaneous Charge** type inventory items can be selected in this window.*

3. Enter or select the **Tech ID** associated to the additional charge.
4. Enter the quantity of the additional charge item that should be charged to the customer.
5. Click the **Extended Price** expansion button to view or modify the price level and billable percentage for the additional charge item.
6. To issue a purchase order for a particular Additional Charge item, select the **P** (Create PO) check box on the item, then click **Create PO**. You can select the vendor associated with the purchase order and generate the purchase order document.
7. To indicate a subcontractor charge, select the **V** (Create Voucher) check box. During service call billing, a voucher will be generated in Payables Management for this charge.
8. To change distributions for unposted distributions, click **Distributions**.

Enter expenses

You can enter expenses incurred for each technician for each service call.

The default cost is the same value as the expense price. Most expenses incurred for a service call will not have a cost that differs from the price. For example, a technician’s meal expenses, parking fees, or tolls may be entered in the Expenses window. The extended cost is the quantity sold multiplied by the item’s cost.

Transaction amounts on a service call are distributed automatically to the posting accounts assigned to the Service Type, the Item Master, or the Posting Accounts Setup windows.

1. Open the Service Call Entry – Expenses window.
Transactions > Service Call Management > Service Calls > Expenses button

| Tech ID | Item Number | Description | Qty | Price | Ext. Cost | V | P | C |
|-----------|-------------|-----------------|------|---------|-----------|-------------------------------------|--------------------------|--------------------------|
| T0101 | 5-TRAVEL | Travel Expenses | 1 | \$25.99 | \$25.99 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| John Wood | | Each | | \$25.99 | \$25.99 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | | 0.00 | \$0.00 | \$0.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | | | \$0.00 | \$0.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

P.O. # Voucher Number

OK Create P O Distribution

2. Enter or select the technician to create an expense record for.



The Inventory Item Lookup window shows all inventory items but only **Services, Flat Fee, and Miscellaneous Charge** type inventory items can be entered in this window.

3. Enter or select the item number of the expense incurred on the service call.
4. Enter the quantity of the expense item that should be charged to the customer.
5. Click the **Extended Price** expansion button to view or modify the price level and billable percentage for the additional charge item.
6. To issue a purchase order for a particular Expense item, select the **P** (Create Purchase Order) check box, then click **Create PO**. You can select the vendor associated with the purchase order and generate the purchase order document.
7. To indicate a subcontractor expense, select the **V** (Create Voucher) check box. During service call billing, a voucher will be generated in Payables Management for this charge.
8. To change distributions for unposted distributions, click **Distributions**.

Complete service tasks

You can mark service tasks as complete and enter the time it took to complete each task. This can be done as each service task is completed.

1. Open the Service Call Service Task window.
Transactions > Service Call Management > Service Calls > Service Type item information icon button

| Task Code | Description | Required | Completed | Tech ID | User | Date | Time | Est Complete Time | Actual Time |
|-----------|-------------|----------|-----------|---------|------|------|-------------|-------------------|-------------|
| 0/0/0000 | | | | | | | 12:00:00 AM | 000:00 | 000:00 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

2. Enter or select a service code.
3. Select **Complete** for each task that is completed.



If a task is required and the **Mark Tasks Required** option is selected in the Option Security – Service Calls window, it must be completed before the service call can be completed. Refer to [Set up default service code tasks](#) on page 16 to change which tasks are required. Refer to [Set up service document security](#) on page 33 to change the settings in the Option Security – Service Calls window.

4. Enter the actual time it took to complete the task, if that value is different from the time that was estimated. If an actual time is not entered, the estimated time will be used.
5. Click **OK**.

Complete a service call

You can complete the review of a service call in preparation for billing. Once a technician has completed the repair or service work on an item, the service call needs to be updated and prepared for billing.

Information entered in the **Cause Code** and **Repair Code** fields can be useful in solving future service calls.

When you enter the date and time the call was completed, the call status is changed to the **Completed** status from the Service Setup – Service window. Marking a service call as ready to invoice allows a service call to appear in the Service Call Billing window.

1. Open the Service Call Entry/Update window.
Transactions > Service Call Management > Service Calls
2. Enter or select a service call number.
3. Enter or select the cause code that indicates why the problem occurred.
4. Enter or select the repair code that represents the resolution used to repair the item.
5. Click the **Complete** field name to automatically enter the date and time that the service call was completed.
6. Enter any additional parts, labor, expenses, or additional charges that pertain to the equipment serviced.
7. Click **Totals** to preview and verify costs, pre-tax prices, tax amounts, and invoice amounts for charges incurred on the service call.
8. Click **Ready Invoice** to update the service call status to Ready to Invoice.
9. Click **Save**.

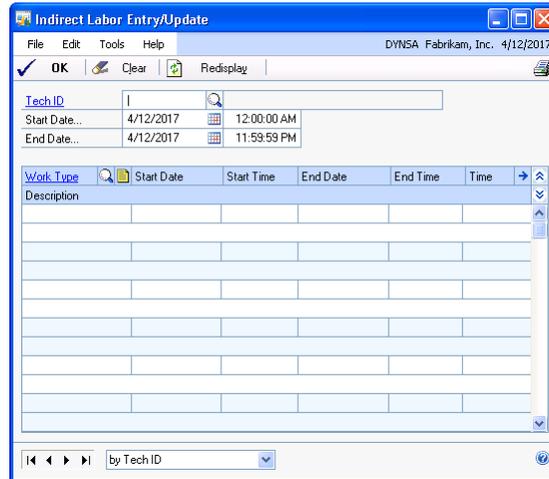
Enter or view indirect labor

You can enter or view labor for a technician who is not directly associated with a service call, such as someone whose labor is non-billable. For example, if a technician needed to attend training, the labor would not be associated with a service call, nor would it be billable to a customer.



If payroll integration is activated in the Service Setup window, the indirect labor information can be posted to Payroll.

1. Open the Indirect Labor Entry/Update window.
Transactions > Service Call Management > Indirect Labor



2. Enter or select a tech ID.
3. Enter the starting and ending date and time range to view labor information for.
4. Enter or accept the default starting and ending dates and times in 24-hour format.
5. If Payroll integration is activated, save the line item. Click the **Time** expansion button to view or modify the payroll information that will be used to generate transactions when labor information is posted to Payroll.
6. To enter additional indirect labor hours, select an existing work type.
7. Enter the starting and ending dates and times in 24-hour format.
8. Click **OK**.

Generate engineered change orders (ECOs)

You can create service calls for engineered change orders (ECOs), which are requests for modification to an item. If a vendor requires work on an item, such as an upgrade, you can use an ECO to automatically enter a service call for the item. You can create service calls for any range of ECO numbers, items numbers, customers IDs, or equipment numbers.

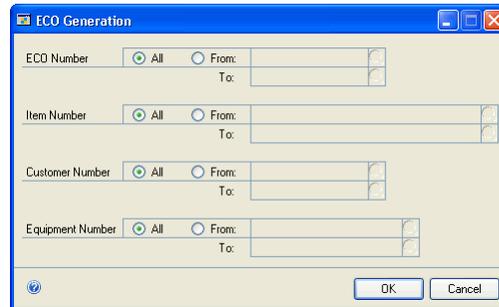
The following is a list of windows the ECO generation process uses to enter the service type on service calls. The windows are shown in the order they are selected. If no entry is found at the first location, the second location is checked and then the third. If no entry is found, no service type is entered on the service call.

- ECO Maintenance window
- Service Setup – Service window
- Item Extensions window
- Contract Type Maintenance window



If both the contract and the item warranty have service types associated with them, the service type specified for the contract overrides the item warranty service type.

1. Open the ECO Generation window.
Microsoft Dynamics GP menu > Tools > Routines > Service Call Management > ECO Generation

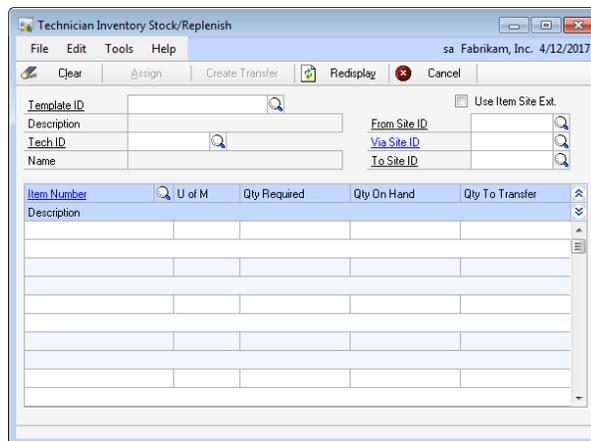


2. Enter ranges to generate ECOs for. You can generate ECOs for a single record or multiple records based on the ranges you select.
3. Click OK.

Replenish technician inventory

Once inventory templates are set up, you can assign a technician to them, and transfer inventory to new and existing warehouses.

1. Open the Technician Inventory Stock/Replenish window.
Microsoft Dynamics GP menu > Tools > Routines > Service Call Management > Tech. Inventory Stock/Replenish



2. Enter or select a Template ID.
3. Enter or select a Tech ID. Click Redisplay. The Items assigned to the template will appear.

4. The default entry in the From Site ID is from the item record and the default entry in the To Site ID is from the Tech ID record. To transfer items using an In Transit Transfer, enter the Via Site ID and click Create Transfer. For more information about In-Transit transfers, see [Transfer inventory](#). The quantity transferred is the quantity necessary to bring the on hand to the required amount.



To quickly assign the items to the To Site ID, click Assign. This is useful if you have a new Tech ID, the items from the template are all assigned to that warehouse, rather than individually adding the site to each item.

5. Once the transfer is complete, the Quantity On Hand will be updated next time you open this window or click Redisplay.



If you have the Allow Transfer Overrides box marked in the Inventory Control Setup window, you will be prompted to override or use the available quantity.

Chapter 5: Posting

When transactions are posted, they become permanent audit trail information. They also update the appropriate service call information, create inventory transfers or adjustments, and generate general ledger journal entries. There are several areas within Service Call Management where transactions are posted to update other modules. Some of these include inventory transfers and service call billing.

For example, when you create a service ticket, the information is available within only Service Call Management. After you've posted service call parts usage, inventory reflects a decrease adjustment for the item and a credit entry updates the inventory account in General Ledger for the item being used in the repair process.

Each of the types of posting routines that can be accomplished within Service Call Management is explained in this part of the documentation. For more information about posting and the audit trail created by the posting process, see the System User's Guide (**Help > Printable Manuals**).

The following topics are discussed:

- [*Consolidate service invoices*](#)
- [*Process required parts*](#)
- [*Inventory transfer consolidation*](#)
- [*Transfer inventory*](#)
- [*Inventory receipts*](#)
- [*Post labor information to Payroll*](#)
- [*Complete service call billing*](#)

Consolidate service invoices

You can consolidate all service calls for a customer into a single sales invoice to simplify billing. To use this feature for a customer, you must have selected the **Consolidate Service Invoices** check box in the **Customer Extensions** window. While billing, you can select from the following options to consolidate service calls:

None Select this option to not perform the consolidation even if you have selected the **Consolidate Service Invoices** check box in the **Customer Extensions** window. See [*Set up customer extensions*](#) on page 35 for more information.

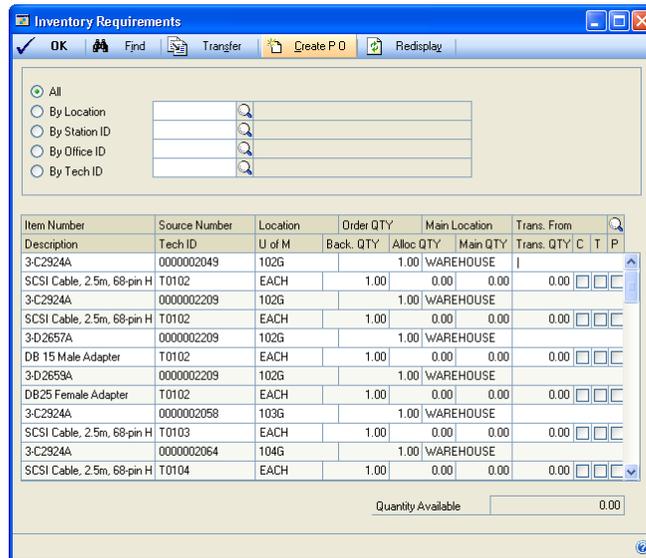
By service type Select this option to consolidate service calls by the service type assigned to the call for the billing customer address combination.

By batch run Select this option to consolidate service calls by the batch run. All the service calls for the customer will be consolidated in a single sales order processing invoice when the batch is run. See [*Complete service call billing*](#) on page 81 for more information.

Process required parts

You can view back-ordered items and determine how to process those back orders. You also can transfer parts from various inventory locations or order the parts by creating a vendor purchase order.

1. Open the Inventory Requirements window.
Transactions > Service Call Management > Inventory Requirements



2. Select the inventory requirements to process.
3. To order parts through a purchase order from the vendor:
 - Enter the site where the purchase order will be received from the vendor.
 - Specify the quantity to be ordered.
 - Select the **P** (Purchase Order) check box to generate a purchase order.
 - Select the **C** (Consolidate) check box to consolidate this item on any existing open purchase orders for the same vendor and location.
 - Click **Create PO** to open the Create PO window.
 - Enter or select the vendor ID that the purchase order should be sent from.
 - Click **Post** to generate the purchase order.
4. To transfer parts from another inventory location:
 - Enter the site where the inventory will be transferred from.
 - Specify the quantity to be transferred.
 - Select the **T** (Transfer) check box to generate an inventory transfer.
 - Select the **C** (Consolidate) check box to consolidate this item on any existing open transfers.
 - Click **Transfer** to create the inventory transfer.
 - The transfer is processed in the In-Transit Transfer Entry window (**Transactions > Service Call Management > In-Transit Transfer Entry**). For more information, see [Transfer inventory](#) on page 79.
5. Click **OK**.

Inventory transfer consolidation

Inventory transfer consolidation creates one transfer document. All items destined for the same customer and address are shipped at the same time.

Consolidation is controlled by the **Disable Consolidation** option in the Service Setup window. Leaving the option cleared indicates that all inventory transfers will be consolidated.

You also can control consolidation manually. Select **Disable Consolidation** in the Service Setup window, then select **Consolidate** on the **Inventory Transfer** line. Each selected item is added to a single transfer document.

If the **Disable Consolidation** option in the setup information is selected, the **C** (Consolidate) check box is empty for any new requirements, or those created after the option was selected. Transfers going to the same Via Site and To Site should be shipped separately.



This option also is checked when transfers are created automatically (Service Call return line, RTV for Repair, and Return).

For consolidation to occur, the following conditions must be true.

- The **Transfer Header** status must be **O** (open).
- The **From**, **Via**, and **To** site IDs must be the same for all items.
- One of the following for the address option must be true.

| Status | Description |
|------------------------|---|
| SVC_Address_Option = 1 | The customer/address must be the same. |
| SVC_Address_Option = 2 | The tech site IDs must be the same. |
| SVC_Address_Option = 3 | The Misc[ellaneous] Address Code must be the same. |
| SVC_Address_Option = 4 | A new transfer always will be created. A status 4 indicates that the shipping address information on the transfer header has been modified. |

Transfer inventory

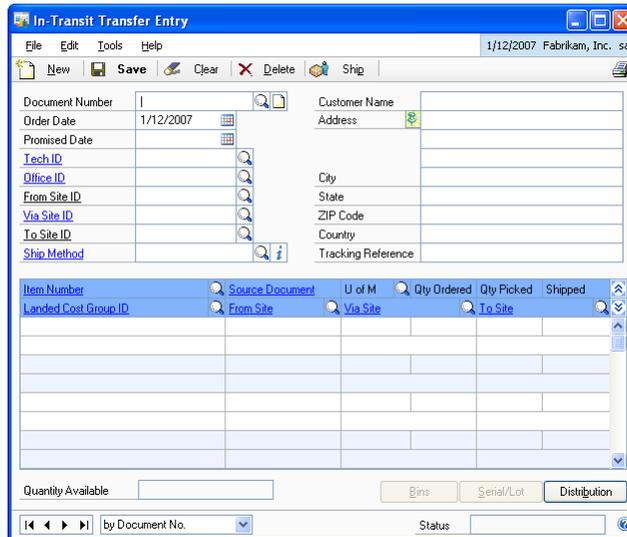
You can enter or process transactions that keep track of a physical movement of inventory items from one site to another. You also can print picking tickets and packing slips and create an inventory transfer not related to a service call.

The customer and address information that you enter is printed on the packing slip that is generated for the transfer.

You can access the Internet tracking pages for delivery services.

1. In the navigation pane, choose the **Field Service** button, and then choose the **In-Transit Transfers** list.

- Choose the **Transfer** button to display the **In-Transit Transfer Entry** window.



- Enter or select a document number or click **New**.



A new transfer created from this window cannot be associated with an existing service call.

- Enter shipping and item information for the transfer record. For more information transferring inventory, see the Returns Management documentation.
- Click **Ship**.

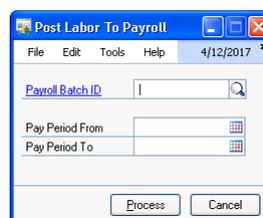
Inventory receipts

You can receive in-transit inventory from the Receiving Transaction Entry window in Purchase Order Processing. Refer to Purchase Order Processing documentation for more information.

Post labor information to Payroll

If Payroll integration is activated in the Service Setup window, you can post labor and indirect labor information to Payroll. For more information, see [Set up Field Service and Payroll integration](#) on page 29.

- Open the Post Labor To Payroll window.
Microsoft Dynamics GP menu > Tools > Setup > Utilities > Project > Service Utilities > Post Labor To Payroll



2. Enter or select a payroll batch.
3. Enter the from and to dates for the transactions to include.
4. Click **Process**.
5. To view the resulting transactions in Payroll, click **Transactions > Payroll > Transaction Entry** and select the batch.

Complete service call billing

The service call billing process automatically creates the correct Sales Order Processing document based on the needs of each service call. If a contract is associated with the service call, the contract is updated with service call information when billing is complete.

During the service call billing process, the tax schedule from the service call header is transferred to the Sales Order Processing invoice and taxes for each item are calculated accordingly. The shipping method from the customer master record also is transferred to the invoice during the billing process.

To update the customer balance in Receivables Management and to update General Ledger accounts, you must post the invoice and return documents that are generated in Sales Order Processing by the service call billing process. For more information about posting, see the Sales Order Processing documentation.

The default entry in the **Complete Date** field is the current user date. The complete date in the Service Call Billing window is used to filter the service calls displayed in the window. All service calls that are selected as **Ready to Invoice** and with a completion date up to and including the selected **Complete Date** are displayed.

1. Open the Service Call Billing window.
Transactions > Service Call Management > Service Call Billing

| Call Number | Status | Type | Tech ID | Office ID | Customer ID | Pre-Tax Total |
|-------------|--------|------|---------|-----------|-------------|---------------|
| Description | | | | | | |
| | | | | | | |
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2. Select whether to consolidate invoices by service type or by batch run. See [Consolidate service invoices](#) on page 77.

3. Select the filter options for the service calls to be invoiced.
4. Select the **M** (Marked to Post) check box to designate any calls to be invoiced.
5. To post the selected service calls, click **Invoice**. A **Service Call Audit Report** is generated, providing a record of the Sales Order Processing documents that have been created. If you consolidated service calls into one invoice, the same invoice number is displayed for the calls that were consolidated.
6. Click **OK**.

Chapter 6: Maintenance procedures

Once you've begun using Service Call Management, proper maintenance of your item and service information is essential for preserving the accuracy of your records. This part of the documentation focuses on tasks that allow you to maintain your service call records effectively.

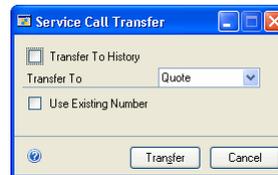
This information is divided into the following topics:

- [*Transfer quotes or service calls*](#)
- [*Transfer service calls to history*](#)
- [*Delete an open service call*](#)
- [*Service call history and deletion*](#)
- [*Modify an existing service call*](#)
- [*Assign items to sites*](#)
- [*Reassign a technician*](#)

Transfer quotes or service calls

You can transfer service call information from an existing document to a newly created document. You can transfer a quote to an open service call, an open service call to history, or a history call to a new quote. For example, if you routinely create service calls based on a quote, you can use the Service Call Transfer window to transfer the existing quote to a new service call document.

1. Open the Service Call Transfer window.
Transactions > Service Call Management > Service Calls > Transfer



2. Select the **Transfer to History** check box to move the existing document to the history service call table.
3. Select the new record type to transfer the existing document to.
4. Select the **Use Existing Number** check box to keep the existing document number.
5. Click **Transfer**.

Transfer service calls to history

You can transfer completed service call documents to service call history tables once the service call has been completed and invoiced. The service call information for the documents in history are still available. You also can transfer quotes to history at any time.



If you select the Move to History During Billing check box in the Service Setup – Service window, service calls are automatically transferred to history when the billing process is complete.

Service history is kept for only the primary equipment number entered in the Service Call Entry/Update window.

1. Open the Move Service Call To History window.
Microsoft Dynamics GP menu > Tools > Routines > Service Call Management > Move To History

2. Enter the criteria to select the records you would like to move to history. You can move either single records or a range of records.
3. Click **Preview** to print a preview report.
4. Click **Process**.

Delete an open service call

You can delete open service call documents if the option to allow service call deletion is selected in the Option Security – Service Calls window. If you delete a document, that document will disappear and not be saved to history.

You cannot delete a service call document if any of the following conditions apply:

- The document has parts that are allocated, back ordered, intransit, or sold.
- Posted general ledger distributions are associated with the document.
- A Return Materials Authorization (RMA) document is associated with the service call document.

1. Open the Service Call Entry/Update window.
Transactions > Service Call Management > Service Calls

2. Enter or select a document to delete.
3. Click **Delete**.

Service call history and deletion

Before you can delete a service call document from history, the option to allow deletion of history documents must be selected in the Option Security – Service Calls window.

You can't delete a document from history in the Service Call Entry/Update window. You must use the [Purge Service Call Utility](#) to remove history service calls. For more information, see [Guidelines for deleting service history](#) on page 92 and [Delete service call history](#) on page 92.

Modify an existing service call

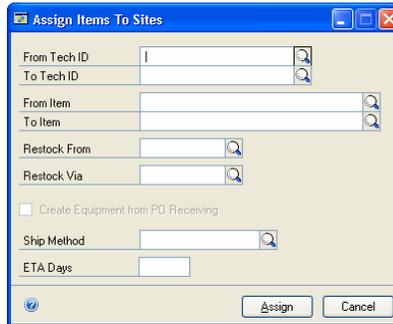
You can add or delete items, change item quantities, or correct posted items on an open service call document.

1. Open the Service Call Entry/Update window.
Transactions > Service Call Management > Service Calls
2. Enter or select the document to modify.
3. To modify a posted parts line item, click **Parts**, then enter the new quantity used. Accept the change to post the new information.
4. To delete an unposted item, select the item and choose **Edit > Delete Row**.

Assign items to sites

You can define restocking paths for a group of technicians or a range of items.

1. Open the Assign Items to Sites window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Assign Item to Site



2. If a group of technicians always is restocked from a specific location, enter the range of technicians in the **From Tech ID** and **To Tech ID** fields.
3. Enter the range of items to restock from a specific location.
4. Specify the location to **Restock From** and the location to **Restock Via**.
5. Click **Assign**.

Reassign a technician

If a technician has stopped working for your company or has taken an extended leave of absence, you to reassign all of that technician's records to a different technician. You can transfer all of the technician's equipment records, customer extensions, and open service calls.

1. Open the Reassign Technician window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Reassign Technician



2. Select which types of records to include in the transfer.
3. Enter or select a technician ID to transfer records from.

4. Enter or select a new technician ID to transfer the records to.
5. Click **Preview** to view or print a report of the records affected by the reassignment.
6. Click **OK**.

Chapter 7: Reconciling procedures

You can reconcile your service call parts inventory to ensure that there is an adequate stock of spare parts to keep your service operations running smoothly.

This part of the documentation also contains information about removing nonessential history. You'll need to determine how much historical information is necessary, and use these procedures to remove that information that is no longer needed.

This information is divided into the following topics:

- [*Reconcile*](#)
- [*Reconcile inventory quantities for service calls*](#)
- [*Reconcile service totals*](#)
- [*Checking links in the Field Service Series*](#)
- [*Guidelines for deleting service history*](#)
- [*Delete service call history*](#)
- [*Delete Service Call Management inventory transfer history*](#)
- [*Remove technician schedule history*](#)

Reconcile

The reconciling process should be used if a system problem, such as a power fluctuation, occurs and you need to be sure that your Service Call Management data is accurate. You also may find the reconcile process useful if you discover inconsistencies in inventory quantities or service call totals.

Before reconciling, back up your company's data. For more information, see the System User's Guide (**Help > Printable manuals**).

Reconcile inventory quantities for service calls

You can reconcile inventory quantities if you discover inconsistencies in inventory allocated quantities. The inventory reconciliation for service calls takes place when you reconcile your inventory quantities. To do this, open the **Reconcile Inventory Quantities** window (**Microsoft Dynamics GP menu > Tools > Utilities > Inventory > Reconcile**), and click **Process**. The service call allocations are validated with the item's allocated quantity values. The **Inventory Reconcile** report displays the discrepancies, if any. See the Inventory control documentation for more information.

The reconcile process resets allocated quantities in the Item Maintenance window for the following records:

- Service Call Parts Lines
- Transfer Parts Lines
- Depot Work Order Parts Lines

Reconcile service totals

You can reconcile totals if you discover inconsistencies in the totals on service quotes and open service calls for parts, labor, and miscellaneous costs and prices.

Before reconciling, back up your company's data. For more information, see the System Administrator's Guide (**Help > Printable Manuals**).

1. Open the Reconcile Service Totals window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Reconcile Service Totals



2. Select the option to recalculate and reset the following totals on service quotes and open service calls:
 - Recalculates the kit item quantity, cost, price, and status based on the component items for the kit on the Parts line.
 - Adds the Parts line cost and price fields to reset the Parts Sub–Total Cost and Price values on the service call header.
 - Adds the Labor line cost and price fields to reset the Labor Sub–Total Cost and Price values on the service call header.
 - Adds the Miscellaneous Charge cost and price fields to reset the Miscellaneous Charges Sub–Total Cost and Price values on the service call header.
3. Click **Process**. The **Service Totals Reconcile** report is generated automatically after the completion of the reconciliation process.

Checking links in the Field Service Series

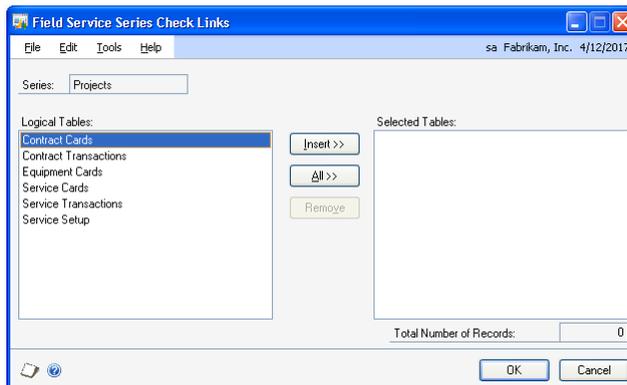
Checking links examines tables, checking corresponding information in related tables and, if possible, changing the damaged data to match the corresponding data in an undamaged table.

If an alert message indicated damage to a specific table, the name of the table won't be listed in the Field Service Series Check Links window.

1. Be sure that no one is using Microsoft Dynamics GP. To view which users are in the Microsoft Dynamics GP system and where, choose **Microsoft Dynamics GP menu > Tools > Setup > System > User Activity**.
2. Make a backup.

Always make a backup before checking links.

3. Open the Field Service Series Check Links window.
Microsoft Dynamics GP menu > Maintenance > FSS Check Links



4. Select the logical tables to check links for, and click **Insert**.

If you know the name of the damaged table, but not the table group to which it belongs, refer to the Table Descriptions window (**Microsoft Dynamics GP menu > Tools > Resource Descriptions > Tables**).

To remove any table from the **Selected Tables** list, highlight the table name and click **Remove**.

5. Click **OK** to check links for the selected tables and print the File Maintenance Error Report. Checking links is performed as a background process, which means you can perform other tasks while the checking is being done. The following things happen when you check links:
 - Microsoft Dynamics GP checks links in the selected tables.
 - The Report Destination window will appear, and you can specify where the File Maintenance Error Report should be printed. If you mark **File**, select the appropriate file format and enter the report file name.
 - The File Maintenance Error Report will display any information that was re-created. If any records that do not have corresponding information in related tables are deleted because they cannot be re-created, the report displays the deleted records. If any records are missing, the report indicates that you should re-create the records.



We recommend that you send the File Maintenance Error Report to the screen, and then print it if necessary, because it might be very large. Each report can be printed only once each time you check links, so it's a good idea to send the report to a file, as well.

- To determine what information to enter again, use the Table Descriptions window (**Microsoft Dynamics GP menu > Tools > Resource Descriptions > Tables**) to view information for the table you checked links for, and then use a window that accesses the table to re-enter information. Some records are created through processes such as posting or aging, and this information can't be reentered manually in a window.



You might want to create a report using Report Writer that lists all fields included in the table that you checked links for. This report can serve as a valuable reference tool. For more information, refer to the Report Writer manual.

Guidelines for deleting service history

History records provide useful information for auditing purposes. They can be maintained and reviewed for an unlimited number of years.

Because historical records increase the amount of storage space needed, review and remove history periodically to ensure that only necessary information is kept.

Before removing service history, back up your company's data. For more information, see the System User's Guide (**Help > Printable Manuals**).

Delete service call history

You can remove history service calls, quotes, and invoiced calls from history up to and including the specified completion date.

- Open the Service Call Purge Utility window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Purge Service Calls



- Select a **Service Call Record Type**.
- Select a specific date up to which service call history should be removed.
- Click **Print** to print a Service Call History Purge report to check for accuracy before removing history.
- Click **Remove** to delete the selected history.

Delete Service Call Management inventory transfer history

You can remove received inventory transfers with a date received on or before the date you specify from history.

1. Open the Transfer Purge Utility window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Purge In –Transit Transfer

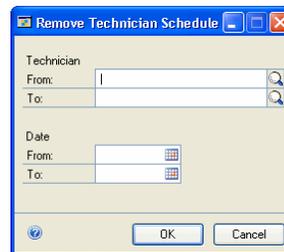


2. Select a specific date up to which transfer history should be removed.
3. Click **Print** to print a Transfer History Purge report to check for accuracy before removing history.
4. Click **Remove** to delete the selected history.

Remove technician schedule history

You can remove outdated technician schedule information from history. This information can be viewed on the technician card (**Cards > Service Call Management > Technician > Schedule**).

1. Open the Remove Technician Schedule window.
Microsoft Dynamics GP menu > Tools > Utilities > Project > Service Utilities > Remove Tech Schedule



2. Enter the range of technicians.
3. Enter the date range to remove a technician’s past schedule information for. The **From Date** field may be left blank, but the **To Date** field is required when removing schedule information.
4. Click **OK**.

Part 3: Inquiries and reports

A vast amount of detailed information about your field service operations and activities is stored. There may be times when you need information about a specific transaction or general information about a group of service tickets. You'll use inquiries and reports to help you view and organize this information.

Use the Inquiry windows to view customer service tickets or problem/repair analysis information. The Inquiry windows provide access to detailed and summarized Field Service information.

Reports can be used to analyze service activity and pinpoint errors in transaction entry. The Printing Reports procedure describes how to print reports using the Service Reports menu.

The following topics are discussed:

- [Chapter 8, "Inquiries,"](#) explains how to use the various inquiry windows within Service Call Management to view current important information on screen.
- [Chapter 9, "Reports,"](#) describes how to use the built-in report writer and the reports provided with Service Call Management to print the information you need in the format that best fits your business needs.

Chapter 8: Inquiries

You can use the inquiry options to review service call transactions, technician workloads, and equipment failure analysis information.

To allow specified users to view information without being able to enter or delete it, specify inquiry settings in the Options Security – Service Calls window.

You can look up information by using the SmartList option or by using inquiry windows.

This information is divided into the following topics:

- [Use SmartList](#)
- [Use inquiry windows](#)

Use SmartList

You can use SmartList to run queries. Default queries are set up automatically, and you can set up customized queries at any time. You also can export queries into Microsoft Word or Microsoft Excel® documents. To use SmartList, choose **Microsoft Dynamics GP menu > SmartList**. For more information, see the System User's Guide (**Help > Printable Manuals**).

Use inquiry windows

Inquiry windows provide easy access to information so that you always have a current view of your repair activity. Some inquiry windows have the same fields and buttons as the maintenance windows that the inquiry information originally was entered in. Most inquiry windows have a link option that you can use to view information as it was entered in the original service call document.



The service call inquiry windows are informational—you cannot make changes to the field service information you're viewing. To make changes to any nonbilled service tickets, use the Service Call Entry/Update window to do so.

Some inquiry windows have unique information that does not appear on entry windows. You can open each of the following windows by choosing **Inquiry > Service Call Management > select a window**.

- Equipment Service Calls
- Problem – Repair Analysis – Summary
- Keyword Inquiry
- Service Audit Inquiry
- Desktop audit inquiry
- Tech Utilization
- Tech Assignment
- Service Call Inquiry
- Tech Labor Inquiry
- Tech Queue
- Service Call History by Customer
- Inventory Transfers History Inquiry
- Equipment Inquiry

Chapter 9: Reports

You can use Service Call Management reports to view your organization's use of parts on service requests, gather information showing the average time a repair takes, or view the actual profitability for your field service activities. Use this documentation as a guide for printing reports and working with report options.

This information is divided into the following topics:

- [Service Call Management report summary](#)
- [Reports you can use with named printers](#)
- [Specify a Service Call Management report option](#)

For information about creating and printing reports and using the reporting tools that you can use with Microsoft Dynamics GP, see the System User's Guide (**Help > Printable Manuals**).

For information about named printers, see the System Administrator's Guide (**Help > Printable Manuals**).

Service Call Management report summary

You can print several types of reports within Service Call Management. Some reports are printed automatically when you complete certain procedures. For example, audit trail reports are printed automatically when you generate service call bills. You can choose to print some reports during procedures. For example, you can print a Technician Listing while entering technician information by clicking the **Printer** icon in the Technician Maintenance window.

The following table displays the report types available in Service Call Management and the reports included in those categories.

| Report type | Report | Printing method |
|---------------|--|--|
| Setup reports | Service Type List Service Type Escalation List Problem Code List Cause Code List Repair Code List Tech Status List Call Status List Serial Equipment Status List Service Time Zone List Office List Service Area List Technician Lists Warranty Code List Customer Extension List Customer Schedule List Item Extension List Serial Master Setup List Configuration Master Setup List Work Type List ECO List Service Call | Choose File > Print in the setup windows or click the Printer icon. |
| Audit reports | Service Call Completion Audit Trail | Printed automatically when you close the service call billing window. |

| Report type | Report | Printing method |
|-----------------------|---|---|
| Analysis reports | Service Call Report Service Call Problem Analysis Equipment Traceability Machine Population Service/Contract Revenue Service Revenue Parts Usage MTBF/MTTR Warranty Overdue Quotes Overdue Transfer Item Site Restocking Path Technician Schedule Pick Tickets Technician Labor Inventory Requirements | Create report options in the Service Call Management reports windows. |
| Reconciliation report | Service Totals Reconcile report | Printed automatically when you complete the reconciliation process. |

Reports you can use with named printers

You can assign printers to the following documents and reports:

- Posting journals and audit reports
- Analysis report
- Service call printouts
- Inventory requirements, transfer and pick reports

Specify a Service Call Management report option

In order to print Service Call Management reports, you must first create a report option. Report options include specifications for sorting reports and range restrictions for a particular report. Each report may have several different options so that you can easily print the information you need. For example, you can create report options for the Service Revenue Report that show information for different ranges of technicians or customers.

Use the Service Call Management report options windows to create sorting, restriction, and printing options for the reports that have been included within Service Call Management.

1. Open a Service Call Management reports window.
Reports > Service Call Management > select a report type
2. Select a report.
3. Click **New**.
4. Enter a name and definition for the option. The name you choose for the option won't appear on the report. The selections available for defining report options vary, depending on the report type you've selected.



You can enter only one restriction for each restriction type. For instance, you can insert one serial number restriction and one customer ID restriction.

5. Enter range restrictions. The available ranges vary, depending on the report type you've selected.
6. Insert or remove the ranges for the **Restrictions List**.
7. Choose **Email Options** to enter email options for the report option. Once the email options are set up, you'll be able to send the reports in an email message from this window by choosing Email. You can also send this report in an email from any list view where the report option is displayed.
8. Click **Destination** to select a printing destination. Select **Ask Each Time** to select printing options each time you print this report option.
9. Click **Print**.

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