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<td>536</td>
</tr>
<tr>
<td>Tool Usage List (SD.615.00)</td>
<td>536</td>
</tr>
<tr>
<td>Usage Code List (SD.616.00)</td>
<td>537</td>
</tr>
<tr>
<td>Use Taxes List (SD.628.00)</td>
<td>537</td>
</tr>
<tr>
<td>Vehicle List (SD.617.00)</td>
<td>538</td>
</tr>
<tr>
<td>Zip Code List (SD.618.00)</td>
<td>538</td>
</tr>
</tbody>
</table>

### Index

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Introduction

User Guide Overview
This user guide provides information regarding the set up and use of the Service Dispatch module. Reviewing the user guide can help you make informed decisions regarding the implementation in the Service Dispatch module in your business.

What is Covered in the User Guide?
The user guide consists primarily of procedures and checklists that describe how to perform the various tasks featured in the Service Dispatch module. The user guide also contains topics that help you become better acquainted with the capabilities of the module. Topics are arranged in a logical order that builds on information previously presented in other user guides.

Who Should Use the User Guide?
The user guide is designed for readers who are new to Service Dispatch. The guide provides the information necessary for making decisions regarding how to use the Service Dispatch module in order to get the most from your system.

How to Use the User Guide
Read the appropriate section of the user guide before proceeding with any system customizations. The user guide presents the procedures and steps required for completing the various customization processes. To assist you in locating information, the user guide contains:

- A “Table of Contents” of logically organized activities and tasks
- A “Quick Reference Task List” of commonly performed tasks
- An alphabetized “Index” of the information provided in the user guide
Service Dispatch Overview

The Service Dispatch module in Microsoft Dynamics® SL is designed to track every detail of a service organization by providing complete automation of service call processing, dispatching, and service call completion or invoicing. This comprehensive service business module streamlines the processing tasks for service organizations and allows dispatching departments to efficiently manage field technicians. Service Dispatch also accurately maintains customer information including account status, equipment, and service history.

Service calls are the heart in the Service Dispatch module. The life cycle of a service call is a straightforward three-step process. Entering a service call in Service Call Entry (SD.200.00) is the first step of the service call process. Service Call Entry (SD.200.00) has been designed to allow customer service representatives to enter a service call into the system in the most simple and time saving manner. To begin the service call entry process, a customer and site must be selected. The fastest and most efficient way of processing a service call is to use the powerful search engine. The system allows users to search for customer site information based on site ID, site name, site attention, site description, site address, site phone, site city, site zip and various equipment information such as equipment ID and serial number.

Once the customer and site have been selected, values attached to the customer site default to the service call. Customer service representatives can override the default values such as scheduling information, call status, priority, start date, time promised, and primary technician. Several problem codes or reasons for the service call, along with notes or source documents specific to the issues can be attached to the service call. When all the needed information is entered and the service call is saved, the system automatically assigns a Service Call ID if this feature is enabled in Service Series Setup Maintenance (SD.000.00).

Depending on several setup options, this screen can default proactive messages to assist customer service representatives in the service call entry process. The PO Required message alerts users that a purchase order is mandatory and that a service call cannot be saved unless a purchase order number is entered. Tenant Not Auth to Call in Site Maintenance (SD.025.00) notifies users that tenants are not allowed to place a service call by displaying Authorization Req to the right of Attention in Service Call Entry (SD200.00). The Open Service Calls message appears when a specific site has existing open service calls when placing the call and allows users to stack calls. The Active Service Contract message notifies users that a site has an existing service contract where the service call may be covered.

Credit related messages also assist customer service representatives in the service call entry process. Many of the credit checking features of the Accounts Receivable module are present, such as verifying the customer’s past due open invoices and verifying that the customer’s credit limit has not been exceeded.

After a service call is entered into the system, the service call can be displayed in Dispatch (SD.201.00). Dispatching technicians to the service call is the second step of the service call process. While viewing the service calls in the dispatching screens, users can assign the appropriate technicians to perform the work. Dispatch (SD.201.00) is used to manage all open, in progress, and completed service calls by service call ID.

Call view templates allow users to view service calls in a variety of ways. Users can set up an unlimited number of call view templates in Dispatch - View Maintenance (SD.004.00) to display service calls in Dispatch (SD.201.00).

Example: A view can be set up to display only open service calls that have a premium or high priority.

After the service call has been dispatched and the technicians have performed the required work, the service call is invoiced or completed, which is the third step of the service call process. The service call invoicing process, which allows users to enter billable line items for material and labor used on a job, creates a batch of invoices in Invoice and Memo (08.010.00) of the Accounts Receivable module and a COGS batch in Issues (10.020.00). Service Call Invoice (SD.640.00) and Service Call Invoice (SSRS) (SD.643.00) also allow billable and non-billable material and labor inventory items to be charged to projects and service contracts. Once a service call invoice has been printed and processed, the service call is considered complete, and no further detail lines can be added to the service call invoice.
Generate Payroll Process (SD.302.00) allows users to initiate Time and Dollar (02.020.00) batches in the Payroll module for labor Work Hours entered in Invoice - T & M Details (SD.203.00). Generate Inventory (SD.306.00) allows users to produce quantity and cost information for material and labor used on a job in Issues (10.020.00) and to generate purchase orders in Purchase Order (04.250.00) and purchase order receipts in Receipt/Invoice Entry (04.010.00) of the Purchasing module. Therefore, Generate Payroll Process (SD.302.00) and Generate Inventory (SD.306.00) do not complete, additional material and labor inventory items can be added to the service call for invoicing.
Service Dispatch Interaction

The figure below illustrates the interaction between the Service Dispatch module and other modules of the system.

**Figure 1: Service Dispatch Interaction**
Implementation Hints and Tips

Auto Numbering Key Identifier Codes

In Microsoft Dynamics SL, most data records require unique identifying codes that distinguish a record from all other data records in the database. To ensure efficient data storage and easy record retrieval for reporting purposes, it is recommended that you establish standardized record coding formats. Depending on the data record type, these codes are either assigned automatically or manually assigned by users during data entry. These codes can be numeric, alphabetic, or alphanumeric.

Field Service Management gives you the option to have the ID of new customers, service calls, and service contracts manually assigned by users or automatically assigned by the system. These coding schemes are maintained in Service Series Setup Maintenance (SD.000.00).

Field Service Management also provides you with the option to add a corresponding branch abbreviation to the first three characters of Customer ID, Service Call ID, and Service Contract ID. If Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), then the abbreviation specified for the branch entered in Branch Maintenance (SD.001.00) is added to the ID when the record is saved.

Example: When entering a service call, the three-character branch prefix is added to Service Call ID when the service call is saved.

Developing Geographic Zones

Geographic zones are used to represent work zones or regions where a company performs jobs or services. These user-defined areas are designed to help dispatching departments be efficient when assigning a service technician to a service call. Since a geographic zone can consist of one or an unlimited number of zip codes, predetermined areas defined by organizations allow dispatchers to decrease the travel time of service technicians and reduce the waiting period of customers to receive service.

Since geographic zones can be associated with a branch, users can easily verify which branch is responsible for a service call. Unlike zip codes, only one branch can be assigned to a geographic zone. Therefore, management has the ability to collect sales and other reporting information by region and branch.

Geographic zone IDs are user-defined and can be any combination of numbers and letters up to 10 characters. The ID of geographic zones should be set up in a consistent and easy to identify manner.

Examples:

- Divide the areas of the city into regions:

<table>
<thead>
<tr>
<th>Alphabetic Geographic Zone ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTH</td>
<td>North Akron</td>
</tr>
<tr>
<td>SOUTH</td>
<td>South Akron</td>
</tr>
<tr>
<td>EAST</td>
<td>East Akron</td>
</tr>
<tr>
<td>WEST</td>
<td>West Akron</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Numeric Geographic Zone ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>North Akron</td>
</tr>
<tr>
<td>02</td>
<td>South Akron</td>
</tr>
<tr>
<td>03</td>
<td>East Akron</td>
</tr>
<tr>
<td>04</td>
<td>West Akron</td>
</tr>
</tbody>
</table>
• Use a branch number and region name combination:

<table>
<thead>
<tr>
<th>Branch ID</th>
<th>Branch Name</th>
<th>Geographic Zone ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Akron</td>
<td>01NORTH</td>
<td>Akron North</td>
</tr>
<tr>
<td>02</td>
<td>Columbus</td>
<td>01SOUTH</td>
<td>Akron South</td>
</tr>
<tr>
<td></td>
<td></td>
<td>01EAST</td>
<td>Akron East</td>
</tr>
<tr>
<td></td>
<td></td>
<td>01WEST</td>
<td>Akron West</td>
</tr>
<tr>
<td></td>
<td></td>
<td>02NORTH</td>
<td>Columbus North</td>
</tr>
<tr>
<td></td>
<td></td>
<td>02SOUTH</td>
<td>Columbus South</td>
</tr>
<tr>
<td></td>
<td></td>
<td>02EAST</td>
<td>Columbus East</td>
</tr>
<tr>
<td></td>
<td></td>
<td>02WEST</td>
<td>Columbus West</td>
</tr>
</tbody>
</table>

• Use an alphabetic branch ID and region name combination:

<table>
<thead>
<tr>
<th>Branch ID</th>
<th>Branch Name</th>
<th>Geographic Zone ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AKR</td>
<td>Akron</td>
<td>AKRNORTH</td>
<td>Akron North</td>
</tr>
<tr>
<td>COL</td>
<td>Columbus</td>
<td>AKRSOUTH</td>
<td>Akron South</td>
</tr>
<tr>
<td></td>
<td></td>
<td>AKREAST</td>
<td>Akron East</td>
</tr>
<tr>
<td></td>
<td></td>
<td>AKRWEST</td>
<td>Akron West</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COLNORTH</td>
<td>Columbus North</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COLSOUTH</td>
<td>Columbus South</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COLEAST</td>
<td>Columbus East</td>
</tr>
<tr>
<td></td>
<td></td>
<td>COLWEST</td>
<td>Columbus West</td>
</tr>
</tbody>
</table>

Note: You can run a report that lists the geographic zones and their zip codes. For more information, see “Geographic Zone List (SD.606.00)” on page 506.

Developing Branches

Branches are used to represent the different divisions or locations in an organization.

Example 1: An organization that has locations in Columbus, Cincinnati, and Cleveland may create a branch for each city.

Example 2: A company that has heating and air conditioning divisions may set up a separate branch for each division.

Organizations typically choose to separate locations or divisions by branch for reporting purposes. For example, Open Service Call List prints open service calls for each branch in an organization.

Geographic zones are attached to branches in order to separate the work areas or routes by location or division. For example, a company with branches in Columbus and Cincinnati may create four work zones for the Cincinnati branch and three work zones for the Columbus branch. Geographic zones can only be assigned with one branch. However, a branch may be associated with an unlimited number of geographic zones, thus forming a one-to-many relationship. If a geographic zone exists in multiple branches, the geographic zone should not be attached to a branch. The geographic zone associated with the customer site is used to default the branch responsible for the service call when entered into Service Call Entry (SD.200.00). Therefore, the service call could be assigned to the wrong branch.

Users have the ability to view open service calls by branch using Dispatch (SD.201.00). Dispatch - View Maintenance (SD.004.00) is used to set up templates to display service calls for one branch or all branches. Viewing open service calls for one branch eliminates the problem of dispatching technicians located in one branch to open service calls of other branches.
Branch IDs are user-defined and can be any combination of numbers and letters up to 10 characters. For example:

<table>
<thead>
<tr>
<th>Branch ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Columbus, Ohio</td>
</tr>
<tr>
<td>002</td>
<td>Cincinnati, Ohio</td>
</tr>
<tr>
<td>003</td>
<td>Cleveland, Ohio</td>
</tr>
</tbody>
</table>

**Note:** The Branch List Report (SD600) lists all of the branches and the information associated with them. For more information, see “Branch List (SD.600.00)” on page 501.

**Developing Call Statuses**

Call statuses are used to define the life cycle of a service call. The call status provides dispatchers and other users with information that tracks the progress of a service call. The system allows an unlimited number of user-defined call statuses that can be any combination of numbers and letters up to 10 characters.

Examples:

- **QUOTE**: The customer has requested a quote for services needed but has not approved the service call.
- **APPROVED**: The service call has been approved by the customer but not by your organization. For example, credit checking may be required before a service call can be opened.
- **OPEN**: The service call has been approved by your organization, but no technician has been assigned to complete the work.
- **ASSIGNED**: The service call has been assigned to a technician to complete the work.
- **ONSITE**: Technicians are at the customer site performing the work specified on the service call.
- **HOLD**: The service call is on hold.
- **HOLDPARTS**: The service call is on hold pending parts to finish the work.
- **PARTSIN**: The service call is on hold but the parts are arriving that were previously back ordered.
- **PARTSOUT**: The service call is on hold because the parts needed to complete the work have been back ordered.
- **INVOICED**: The customer has been invoiced for the work performed.
- **COMPLETED**: All work on the service call has been performed, and the customer has been invoiced.
- **CANCELLED**: The service call was cancelled by the customer.

**Note:** One call status must be used to represent a completed service call. A service call is considered complete when the service call invoice has been printed and processed. Once a service call is complete, no changes can be made to the service call, and the service call no longer displays on the dispatching boards. The **Call Status on Completion** in Service Series Setup Maintenance (SD.000.00) is used to define the call status automatically assigned by the invoicing process to complete a service call.

Each time the call status of a service call is changed, the system creates a log and records the date and time the change was made, as well as the user who made the change. Using the Note feature, users can attach notes as to why the status of a service call was changed.

**Example:** A service call was cancelled due to a snowstorm.

**Note:** You can run a report that lists call statuses and the information associated with them. For more information, see “Call Status List (SD.601.00)” on page 502.
Developing Call Types

Call types are extremely important to the Service Dispatch system. Call types give organizations the ability to separate service calls or jobs by different divisions or lines of business. If organizations want to track the revenue and costs of each line of business in the company, subaccounts associated to the line of business can be attached to the call types for general ledger purposes. For example, if Heating, Plumbing, Electrical and Air Conditioning profit and loss statements need to be generated separately, develop a call type for each line of business and attach the appropriate subaccount.

Call type IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, call types are alphabetical for easy recognition during data entry and reporting.

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Call Type Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEAT</td>
<td>Heating Line of Business</td>
</tr>
<tr>
<td>PLUMB</td>
<td>Plumbing Line of Business</td>
</tr>
<tr>
<td>AIR</td>
<td>Air Conditioning Line of Business</td>
</tr>
<tr>
<td>ELECT</td>
<td>Electrical Line of Business</td>
</tr>
<tr>
<td>PM</td>
<td>Preventive Maintenance</td>
</tr>
</tbody>
</table>

Note: You can run a report of all call types. For more information, see “Call Type List (SD.602.00)” on page 502.

Developing Problem Codes

Problem codes are used to define the reason why a service call is generated. Unlike call types that can have a one-to-one relationship with a line of business, multiple problem codes may exist for each call type.

Example: A HEATING call type can have HEAT01-Emergency No Heat and HEAT02 – Change Air Filter.

Although problem codes are optional, setting up at least one problem code for each call type is recommended. When attaching a call type to a service call, only the problem codes associated to the call type are displayed and can be assigned to the service call. If problem codes are not used in the system, only the call type must be entered when generating a service call.

An estimated time to complete a repair can be attached to problem codes. This time is used by the system to calculate the duration of time needed to complete a service call. This estimated time is also useful for users during the dispatching process by estimating the total amount of time needed to complete a service.

To reduce the amount of time needed to train Customer Service Representatives for service call processing, questions and notes can be attached to problem codes to assist in collecting valuable information from customers. Questions for CSRs to ask when entering a service call can be designed to provide technicians that perform the work with valuable information.

Example: When completing a HEATING call type and a HEAT02 – Change Air Filter problem code, specifying the location of a furnace in a house may be important. After a problem code is assigned to a service call in Service Call Entry (SD.200.00), the notes associated to the problem code displays. In order to activate the note feature when entering a problem code for a service call, the Prompt Operator check box must be selected.

If problem codes are not used, the note feature cannot be implemented.
Implementation Hints and Tips

Problem code IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, problem codes are alphanumeric for reporting purposes.

<table>
<thead>
<tr>
<th>Problem Code ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEAT01</td>
<td>Emergency No Heat</td>
</tr>
<tr>
<td>HEAT02</td>
<td>Change Air Filter</td>
</tr>
<tr>
<td>AIR01</td>
<td>Emergency No Air</td>
</tr>
<tr>
<td>AIR02</td>
<td>No Power</td>
</tr>
<tr>
<td>PLUMBING01</td>
<td>Emergency No Water</td>
</tr>
<tr>
<td>PLUMBING02</td>
<td>Emergency Flooding</td>
</tr>
<tr>
<td>PM</td>
<td>Routine Preventive Maintenance</td>
</tr>
</tbody>
</table>

Note: You can run a report that lists all of the problem codes and their associated information. For more information, see “Problem Code List (SD.634.00)” on page 509.

Differences Between Customers and Customer Sites

To process transactions for consumers that purchase items or services from your organization, information about each customer must be set up in Customer Maintenance (08.260.00) of the Accounts Receivable module. Every customer has a unique ID that distinguishes that customer from all other customers in the database. All customers can have an unlimited number of locations where items can be shipped or where services can be performed. In the Service Dispatch module, these locations are considered sites.

Although customers may have one central address for billing, multiple locations may exist where work is performed. There is a one-to-one relationship with a Customer ID and a billing address. There is a one-to-many relationship with a Customer ID and Customer Sites. Therefore, when setting up customers and customer sites, the billing address is the determining factor when setting up one Customer ID or multiple Customer IDs for a consumer.

Example: If a customer in Cleveland also has locations in Columbus, Cincinnati, and Detroit, and the company wants all of the invoices for each location sent to the central office in Cleveland for payment, then one Customer ID and four customer sites must be created. One customer site must be created for each city or location. If the customer wants each location to pay its own invoices, then four Customer IDs must be set up, one for each city or location.

Each customer site has a unique identifier that distinguishes one site from another site of the customer. Although a customer can only have one 001 site, every customer can have a 001 site. A site ID is only unique to the customer, not to the system. Site Maintenance (SD.025.00) is used to set up an unlimited number of sites per customer as an extension of the shipping address from Shipping Addresses (08.262.00). This screen is also used to identify specific information that pertains to each site of a customer as well as set up default values that allow customer service representatives to quickly process a service call once a site is selected.

Example: Each site can have separate Company Name, Attention, Address, Phone Number, Fax Number, Tax ID, and Special Pricing information as well as a default Geographic Zone, Branch ID, Call Type, Salesperson, and Technician.

Note: In Service Call Entry (SD.200.00), if the customer has a site of DEFAULT, the site defaults to service call entry when the customer is selected. If the customer does not have a DEFAULT site, the customer site must be selected manually.

Customer IDs are unique identifying codes that must be manually assigned to customers in Customer Maintenance (08.260.00) of Accounts Receivable or Service Call Entry (SD.200.00). If Auto Number Customer ID in Service Series Setup Maintenance (SD.000.00) is enabled, the Customer IDs of new customers can automatically be assigned by the system in Service Call Entry (SD.200.00). Customer IDs can be any combination of numbers and letters up to 10 characters. If Auto-Number Branch Prefix
Service Dispatch

is enabled in Service Series Setup Maintenance (SD.000.00), the corresponding branch abbreviation will default to the first three characters of the Customer ID.

Possible Customer ID formats include:

- The initial series of letters in the customer name:

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSINE</td>
<td>Business Interiors</td>
</tr>
<tr>
<td>FRONTZ</td>
<td>Frontz Drilling</td>
</tr>
<tr>
<td>HAINES</td>
<td>Haines &amp; Company</td>
</tr>
<tr>
<td>LETTER</td>
<td>The Letter Shop</td>
</tr>
</tbody>
</table>

- Sequential numbers:

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>Business Interiors</td>
</tr>
<tr>
<td>0002</td>
<td>Frontz Drilling</td>
</tr>
<tr>
<td>0003</td>
<td>Haines &amp; Company</td>
</tr>
<tr>
<td>0004</td>
<td>The Letter Shop</td>
</tr>
</tbody>
</table>

- Combination of a name and number:

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSI01</td>
<td>Business Interiors Cleveland</td>
</tr>
<tr>
<td>BUSI02</td>
<td>Business Interiors Akron</td>
</tr>
<tr>
<td>FRON01</td>
<td>Frontz Drilling Wooster</td>
</tr>
<tr>
<td>FRON02</td>
<td>Frontz Drilling Canton</td>
</tr>
<tr>
<td>HAIN01</td>
<td>Haines &amp; Company Akron</td>
</tr>
<tr>
<td>HAIN02</td>
<td>Haines &amp; Company Canton</td>
</tr>
<tr>
<td>LETT01</td>
<td>The Letter Shop Akron</td>
</tr>
<tr>
<td>LETT02</td>
<td>The Letter Shop Canton</td>
</tr>
</tbody>
</table>

Site IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Possible site ID formats include:

- A series of letters in the location name:

<table>
<thead>
<tr>
<th>Site ID</th>
<th>Site Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLEV</td>
<td>Cleveland</td>
</tr>
<tr>
<td>COLU</td>
<td>Columbus</td>
</tr>
<tr>
<td>CINC</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>DETR</td>
<td>Detroit</td>
</tr>
</tbody>
</table>

- Sequential numbers:

<table>
<thead>
<tr>
<th>Site ID</th>
<th>Site Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>Cleveland</td>
</tr>
<tr>
<td>002</td>
<td>Columbus</td>
</tr>
<tr>
<td>003</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>004</td>
<td>Detroit</td>
</tr>
</tbody>
</table>
• Combination of a name and number:

<table>
<thead>
<tr>
<th>Site ID</th>
<th>Site Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLEV01</td>
<td>Cleveland North</td>
</tr>
<tr>
<td>CLEV02</td>
<td>Cleveland South</td>
</tr>
<tr>
<td>CLEV03</td>
<td>Cleveland East</td>
</tr>
<tr>
<td>CLEV04</td>
<td>Cleveland West</td>
</tr>
<tr>
<td>COLU01</td>
<td>Columbus North</td>
</tr>
<tr>
<td>COLU02</td>
<td>Columbus South</td>
</tr>
<tr>
<td>COLU03</td>
<td>Columbus East</td>
</tr>
<tr>
<td>COLU04</td>
<td>Columbus West</td>
</tr>
<tr>
<td>CINC01</td>
<td>Cincinnati North</td>
</tr>
<tr>
<td>CINC02</td>
<td>Cincinnati South</td>
</tr>
<tr>
<td>CINC03</td>
<td>Cincinnati East</td>
</tr>
<tr>
<td>CINC04</td>
<td>Cincinnati West</td>
</tr>
<tr>
<td>DETR01</td>
<td>Detroit North</td>
</tr>
<tr>
<td>DETR02</td>
<td>Detroit South</td>
</tr>
<tr>
<td>DETR03</td>
<td>Detroit East</td>
</tr>
<tr>
<td>DETR04</td>
<td>Detroit West</td>
</tr>
</tbody>
</table>

**Site Subaccount versus Call Type Subaccount**

Spending a considerable amount of time developing a logical, well-organized chart of accounts structure in the General Ledger module is recommended. The financial report requirements of an organization not only affect the design of the subaccount, but also how the Service Dispatch module is set up. Typically, the subaccount code of the chart of accounts defines the companies, divisions, locations, departments, projects and other categories within the overall structure of the organization.

**Lines of Business**

If an organization wants a Profit and Loss statement for each line of business in the company, then the different lines of businesses must be set up as a segment of the subaccount in the General Ledger module.

**Example:** If a company performs plumbing, electrical, heating and air conditioning services, each line of business must be set up as a valid record in the line of business segment of the subaccount.

<table>
<thead>
<tr>
<th>Subaccount Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>PLUMBING</td>
</tr>
<tr>
<td>02</td>
<td>ELECTRICAL</td>
</tr>
<tr>
<td>03</td>
<td>HEATING</td>
</tr>
<tr>
<td>04</td>
<td>AIR CONDITIONING</td>
</tr>
</tbody>
</table>

After valid entries for each line of business of the company have been set up in the subaccount, each line of business must be set up as a valid call type in *Call Type Maintenance* (SD.003.00).
When setting up each call type, the appropriate subaccount that represents the line of business must be associated with the call type.

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Description</th>
<th>Subaccount Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLUMB</td>
<td>PLUMBING</td>
<td>01</td>
</tr>
<tr>
<td>ELECT</td>
<td>ELECTRICAL</td>
<td>02</td>
</tr>
<tr>
<td>HEAT</td>
<td>HEATING</td>
<td>03</td>
</tr>
<tr>
<td>AIR</td>
<td>AIR CONDITIONING</td>
<td>04</td>
</tr>
</tbody>
</table>

**Locations**

If an organization wants an Income Statement for each location in the company, then location must be a segment in the subaccount structure.

**Example:** If a company located in Cleveland, Ohio also has offices in Columbus, Cincinnati, and Detroit, each city must be set up as a valid segment of the subaccount.

<table>
<thead>
<tr>
<th>Subaccount Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>CLEVELAND</td>
</tr>
<tr>
<td>02</td>
<td>COLUMBUS</td>
</tr>
<tr>
<td>03</td>
<td>CINCINNATI</td>
</tr>
<tr>
<td>04</td>
<td>DETROIT</td>
</tr>
</tbody>
</table>

After valid entries for the different locations of the company have been established in the subaccount, each location must be set up as a valid branch in *Branch Maintenance* (SD.001.00).

<table>
<thead>
<tr>
<th>Branch</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>CLEVELAND</td>
</tr>
<tr>
<td>20</td>
<td>COLUMBUS</td>
</tr>
<tr>
<td>30</td>
<td>CINCINNATI</td>
</tr>
<tr>
<td>40</td>
<td>DETROIT</td>
</tr>
</tbody>
</table>
When creating a site for a customer in Site Maintenance (SD.025.00), the branch and the subaccount that identifies the branch responsible for the site must be associated to the site.

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Site ID</th>
<th>Site Description</th>
<th>Branch ID</th>
<th>Subaccount Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>C300</td>
<td>100</td>
<td>CLEVELAND-EAST</td>
<td>10</td>
<td>01</td>
</tr>
<tr>
<td></td>
<td>110</td>
<td>CLEVELAND-WEST</td>
<td>10</td>
<td>01</td>
</tr>
<tr>
<td></td>
<td>120</td>
<td>CLEVELAND-SOUTH</td>
<td>10</td>
<td>01</td>
</tr>
<tr>
<td></td>
<td>130</td>
<td>CLEVELAND-NORTH</td>
<td>10</td>
<td>01</td>
</tr>
<tr>
<td></td>
<td>200</td>
<td>COLUMBUS-EAST</td>
<td>20</td>
<td>02</td>
</tr>
<tr>
<td></td>
<td>210</td>
<td>COLUMBUS-WEST</td>
<td>20</td>
<td>02</td>
</tr>
<tr>
<td></td>
<td>220</td>
<td>COLUMBUS-SOUTH</td>
<td>20</td>
<td>02</td>
</tr>
<tr>
<td></td>
<td>230</td>
<td>COLUMBUS-NORTH</td>
<td>20</td>
<td>02</td>
</tr>
<tr>
<td></td>
<td>300</td>
<td>CINCINNATI-EAST</td>
<td>30</td>
<td>03</td>
</tr>
<tr>
<td></td>
<td>310</td>
<td>CINCINNATI-WEST</td>
<td>30</td>
<td>03</td>
</tr>
<tr>
<td></td>
<td>320</td>
<td>CINCINNATI-SOUTH</td>
<td>30</td>
<td>03</td>
</tr>
<tr>
<td></td>
<td>330</td>
<td>CINCINNATI-NORTH</td>
<td>30</td>
<td>03</td>
</tr>
<tr>
<td></td>
<td>400</td>
<td>DETROIT-EAST</td>
<td>40</td>
<td>04</td>
</tr>
<tr>
<td></td>
<td>410</td>
<td>DETROIT-WEST</td>
<td>40</td>
<td>04</td>
</tr>
<tr>
<td></td>
<td>420</td>
<td>DETROIT-SOUTH</td>
<td>40</td>
<td>04</td>
</tr>
<tr>
<td></td>
<td>430</td>
<td>DETROIT-NORTH</td>
<td>40</td>
<td>04</td>
</tr>
</tbody>
</table>

Although the line of business sales and costs are not be tracked in the General Ledger, each line of business must be set up as a valid call type in Call Type Maintenance (SD.003.00).

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLUMB</td>
<td>PLUMBING</td>
</tr>
<tr>
<td>ELECT</td>
<td>ELECTRICAL</td>
</tr>
<tr>
<td>HEAT</td>
<td>HEATING</td>
</tr>
<tr>
<td>AIR</td>
<td>AIR CONDITIONING</td>
</tr>
</tbody>
</table>

When setting up the call type for each line of business, **Sub from Site** must be selected in order to have the system default the subaccount associated to the sales and costs of the service call based on the value attached to the customer site.

If an organization wants to track the revenue and costs for each location and line of business in the company, both characteristics must be built into the subaccount structure.

<table>
<thead>
<tr>
<th>Line of Business Segment</th>
<th>Description</th>
<th>Location Segment Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>PLUMBING</td>
<td>01</td>
<td>CLEVELAND</td>
</tr>
<tr>
<td>20</td>
<td>ELECTRICAL</td>
<td>02</td>
<td>COLUMBUS</td>
</tr>
<tr>
<td>30</td>
<td>HEATING</td>
<td>03</td>
<td>CINCINNATI</td>
</tr>
<tr>
<td>40</td>
<td>AIR CONDITIONING</td>
<td>04</td>
<td>DETROIT</td>
</tr>
</tbody>
</table>

After valid entries for location and line of business of the company have been established in the subaccount, each location must be set up as a valid branch in Branch Maintenance (SD.001.00).

<table>
<thead>
<tr>
<th>Branch</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>CLEVELAND</td>
</tr>
<tr>
<td>02</td>
<td>COLUMBUS</td>
</tr>
<tr>
<td>03</td>
<td>CINCINNATI</td>
</tr>
<tr>
<td>04</td>
<td>DETROIT</td>
</tr>
</tbody>
</table>
After valid entries for each company location have been set up as a branch in *Branch Maintenance* (SD.001.00), each line of business and branch combination must be established as a valid call type in *Call Type Maintenance* (SD.003.00).

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLUMB-01</td>
<td>PLUMBING-CLEVELAND</td>
</tr>
<tr>
<td>PLUMB-02</td>
<td>PLUMBING-COLUMBUS</td>
</tr>
<tr>
<td>PLUMB-03</td>
<td>PLUMBING-CINCINNATI</td>
</tr>
<tr>
<td>PLUMB-04</td>
<td>PLUMBING-DETROIT</td>
</tr>
<tr>
<td>HEAT-01</td>
<td>HEATING-CLEVELAND</td>
</tr>
<tr>
<td>HEAT-02</td>
<td>HEATING- COLUMBUS</td>
</tr>
<tr>
<td>HEAT-03</td>
<td>HEATING- CINCINNATI</td>
</tr>
<tr>
<td>HEAT-04</td>
<td>HEATING- DETROIT</td>
</tr>
<tr>
<td>ELECT-01</td>
<td>ELECTRICAL- CLEVELAND</td>
</tr>
<tr>
<td>ELECT-02</td>
<td>ELECTRICAL- COLUMBUS</td>
</tr>
<tr>
<td>ELECT-03</td>
<td>ELECTRICAL- CINCINNATI</td>
</tr>
<tr>
<td>ELECT-04</td>
<td>ELECTRICAL- DETROIT</td>
</tr>
<tr>
<td>AIR-01</td>
<td>AIR CONDITIONING- CLEVELAND</td>
</tr>
<tr>
<td>AIR-02</td>
<td>AIR CONDITIONING- COLUMBUS</td>
</tr>
<tr>
<td>AIR-03</td>
<td>AIR CONDITIONING- CINCINNATI</td>
</tr>
<tr>
<td>AIR-04</td>
<td>AIR CONDITIONING- DETROIT</td>
</tr>
</tbody>
</table>
When setting up each call type, the appropriate subaccounts that represent the line of business and location must be associated with the call type.

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Description</th>
<th>Subaccount Number (Line of Business-Location)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLUMB-01</td>
<td>PLUMBING-CLEVELAND</td>
<td>10-01</td>
</tr>
<tr>
<td>PLUMB-02</td>
<td>PLUMBING-COLUMBUS</td>
<td>10-02</td>
</tr>
<tr>
<td>PLUMB-03</td>
<td>PLUMBING-CINCINNATI</td>
<td>10-03</td>
</tr>
<tr>
<td>PLUMB-04</td>
<td>PLUMBING-DETROIT</td>
<td>10-04</td>
</tr>
<tr>
<td>HEAT-01</td>
<td>HEATING-CLEVELAND</td>
<td>20-01</td>
</tr>
<tr>
<td>HEAT-02</td>
<td>HEATING- COLUMBUS</td>
<td>20-02</td>
</tr>
<tr>
<td>HEAT-03</td>
<td>HEATING- CINCINNATI</td>
<td>20-03</td>
</tr>
<tr>
<td>HEAT-04</td>
<td>HEATING- DETROIT</td>
<td>20-04</td>
</tr>
<tr>
<td>ELECT-01</td>
<td>ELECTRICAL- CLEVELAND</td>
<td>30-01</td>
</tr>
<tr>
<td>ELECT-02</td>
<td>ELECTRICAL- COLUMBUS</td>
<td>30-02</td>
</tr>
<tr>
<td>ELECT-03</td>
<td>ELECTRICAL- CINCINNATI</td>
<td>30-03</td>
</tr>
<tr>
<td>ELECT-04</td>
<td>ELECTRICAL- DETROIT</td>
<td>30-04</td>
</tr>
<tr>
<td>AIR-01</td>
<td>AIR CONDITIONING- CLEVELAND</td>
<td>40-01</td>
</tr>
<tr>
<td>AIR-02</td>
<td>AIR CONDITIONING- COLUMBUS</td>
<td>40-02</td>
</tr>
<tr>
<td>AIR-03</td>
<td>AIR CONDITIONING- CINCINNATI</td>
<td>40-03</td>
</tr>
<tr>
<td>AIR-04</td>
<td>AIR CONDITIONING-DETROIT</td>
<td>40-04</td>
</tr>
</tbody>
</table>

When creating a site for a customer in Site Maintenance (SD.025.00), only the branch that is responsible for the site must be associated to the site.

<table>
<thead>
<tr>
<th>Customer ID</th>
<th>Site ID</th>
<th>Site Description</th>
<th>Branch ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>C300</td>
<td>100</td>
<td>CLEVELAND</td>
<td>01</td>
</tr>
<tr>
<td>200</td>
<td>COLUMBUS</td>
<td>02</td>
<td></td>
</tr>
<tr>
<td>300</td>
<td>CINCINNATI</td>
<td>03</td>
<td></td>
</tr>
<tr>
<td>400</td>
<td>DETROIT</td>
<td>04</td>
<td></td>
</tr>
</tbody>
</table>

Therefore, how an organization wants to track revenue and costs plays an important factor in determining not only how to set up the subaccount structure, but also how to set up the Service Dispatch module.

**Time & Material versus Flat Rate Pricing**

After the service call has been dispatched and the technicians have performed the necessary work, the service call must be invoiced or completed. Invoice - T & M Details (SD.203.00) allows users to enter the material and labor needed to complete the service call or job. The system provides two Service Type options when invoicing: Time & Material and Flat Rate Pricing.

The Time & Material option allows users to enter an unlimited number of detail lines for labor and material needed to carry out the work of a service call or job. Once all of the detail has been entered and the invoice has been printed and processed, the Microsoft Dynamics SL modules are updated based on the Line Type of each line item. Line Type in Invoice - T & M Details (SD.203.00) determines whether to charge the line items to a customer, to a service contract, to a project, or to nothing in the case of warranty or other non-billable charges. The different Line Type options include Billable, In-House Warranty, Manufacturer Warranty, Non-Billable, Project, and Service Contracts.

Billable creates a batch in Invoice & Memo (08.010.00) of Accounts Receivable and an Issues (10.020.00) batch in Inventory, In-House Warranty, Manufacturer's Warranty, and Non-billable only create a batch in Issues (10.020.00); no batch is created in Accounts Receivable. Project creates a COGS batch in Issues (10.020.00) and updates a project based on Project ID associated to the service call and Task ID associated with the detail line item. Service Contract creates a COGS batch in Issues
(10.020.00) and updates the profitability of a service contract based on the **Contract ID** associated with the detail line item.

**Flat Rate Pricing** is a separate service management module in Field Service Management that allows users to create an unlimited number of user-defined flat rates that include all of the material, labor, and overhead costs needed to cover a job or service call. Since flat rate entries are always billable to the customer, users do not have to enter all of the detail material and labor line items when invoicing. However, if additional material and labor is required for a job, the additional resources can be added in **Flat Rate Order - Modify Detail** (SP.202.00) without modifying the price. Flat Rate Pricing creates a batch in **Invoice & Memo** (08.010.00) of Accounts Receivable and an **Issues** (10.020.00) batch in Inventory.

Service Dispatch also provides three **Invoice Type** options when entering invoice information into **Invoice Entry** (SD.202.00): **Invoice**, **Manual**, and **Progress**. The invoice number for **Invoice** is assigned to the service call after the service call invoice is printed and saved to the system through **Service Invoice Printing - Keep/Delete** (SD.642.00). **Manual** requires that a user-specified invoice number be typed into **Invoice/Memo Nbr** before the invoice information can be saved to the system in **Invoice Entry** (SD.202.00).

On occasion, although technicians may not be able to perform all of the work on a service call, an invoice for the customer still must be generated. Service Dispatch has the capability to perform progress invoices. **Progress** invoicing allows users to invoice customers for material and labor used to perform the work without closing the service call. Therefore, additional work and detail lines items can be added to the service call for invoicing. **Progress** disables **Invoice/Memo Nbr** in **Invoice Entry** (SD.202.00) and assigns an invoice number to the printed invoices when generated using **Service Call Invoice** (SD.640.00) or **Service Call Invoice (SSRS)** (SD.643.00).

**Dispatch Board versus Graphical Dispatch Board**

There are two dispatch boards available in Field Service Management. Use **Dispatch** (SD.201.00) to manage open and in-progress service calls by **Service Call ID**. Use **Graphical Dispatch Board** (SD.900.00) to manage service call information by **Problem Code**.

The **Graphical Dispatch Board** (SD.900.00) has limited compatibility with Customization Manager. You should only use the Customization Manager to change text on the following tabs:

<table>
<thead>
<tr>
<th>Options</th>
<th>Dispatch Board</th>
<th>Unassigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned</td>
<td>In-route</td>
<td>WIP</td>
</tr>
<tr>
<td>Completed</td>
<td>P/U Parts</td>
<td>Parts-out</td>
</tr>
<tr>
<td>Parts-in</td>
<td>Hold</td>
<td>Incomplete</td>
</tr>
</tbody>
</table>

Changing the order of the **Graphical Dispatch Board** (SD.900.00) columns in the service call details pane grid is simple and does not require Customization Manager. Simply click and hold the left mouse button in the title area of a column and drag the column to the desired position.

Sort data in the service call details pane grid by clicking in the title area of the column you wish to sort by. Clicking once sorts the rows in ascending order using the data in the column; clicking a second time causes the data to be sorted in descending order.

**Developing Special Pricing**

Use special pricing to set up special prices by customer ID, customer site ID, and inventory ID. These special prices apply only to Service Series. Additionally, you can set up special pricing revisions and perform revisions and updates in a global manner. The ability to group customer sites into a customer site group ID is also available.

**Example:** North wind Traders is a servicer of industrial HVAC systems and sells replacement parts directly to its customers during service appointments. North wind Traders has decided to reduce the sales price of some of their replacement parts because of a decrease in costs. North wind Traders currently services 135 customers, with an average of 75 sites per customer, totaling 10,000 customer sites. They provide 500 unique replacement parts (inventory IDs). They use **Site – Special Pricing Revisions** (SD.042.00) to perform a mass update to their revised price/disc%. Then, they use **Update Special Pricing with Revisions** (SD.043.00) to move these revised price/disc% to the current
price/disc%. Last, they save an electronic copy of the Special Pricing (SD.645.00) report to a network share for reference by their service technicians and salespeople.

For more information about special pricing, see the following topics:

- “Define Customer Site Groups (SD.041.00)” on page 110
- “Define Special Pricing (SD.037.00) (Optional)” on page 111
- “Create Special Pricing Revisions (SD.042.00) (Optional)” on page 183
- “Update Special Pricing with Revisions (SD.043.00) (Optional)” on page 186
Implementation Check List

The checklist below may be used as a guide when completing a Service Dispatch implementation.

<table>
<thead>
<tr>
<th>Description</th>
<th>Assigned To</th>
<th>Date Required</th>
<th>Date Completed</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Status Maintenance (SD.002.00)</td>
<td></td>
<td></td>
<td></td>
<td>• Define at least one call status</td>
</tr>
<tr>
<td>Service Series Setup Maintenance (SD.000.00)</td>
<td></td>
<td></td>
<td></td>
<td>• Define business hours 1. Define service lead time 2. Define service call range time • Define miscellaneous defaults 1. Auto-number branch prefix 2. Determine how PO numbers will be assigned 3. Create PO receipts on purchase orders 4. Determine if vouchers will be created on PO receipts 5. Is the Payroll module interfaced with Field Service Management? • Define paging information • Determine reference numbering schema 1. Last service call ID 2. Last customer ID 3. Last contract ID • Determine how reference number schemas will be assigned 1. Auto-number service call ID 2. Auto-number customer ID 3. Auto-number contract ID • Determine alert systems to activate 1. Active contract notification 2. Open service call alert 3. Technician skills and licenses alert • Assigned call status for completed service calls</td>
</tr>
<tr>
<td>Graphical Dispatch Setup Maintenance (SD.902.00) (optional)</td>
<td></td>
<td></td>
<td></td>
<td>• Determine if Employee Class Labels will be displayed • Enter Average Travel Time if desired • Determine when Average Travel Time will be assigned</td>
</tr>
<tr>
<td>Description</td>
<td>Assigned To</td>
<td>Date Required</td>
<td>Date Completed</td>
<td>Comments</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>• Select Conflicting Call Save Option</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Select text to display on task bars</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Determine if Time Conflict Warning should be displayed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set Customer Email options: 1. Determine if technicians should be copied when an email message is sent to a customer 2. Determine the subject text for email messages sent to customers 3. Determine the body text for email messages sent to customers</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set Technician Email options: 1. Determine the subject text for email messages sent to technicians 2. Determine the body text for email messages sent to technicians</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set Problem Status colors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set Technician Status colors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>License Maintenance (SD.010.00) (optional)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up employee licenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up business licenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip Code Maintenance (SD.021.00) (optional)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Set up postal codes where services are performed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>License - ZIP Code Maintenance (SD.011.00) (optional)</td>
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<tr>
<td>• Associate business licenses to postal codes</td>
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<td>• Associate employee licenses to postal codes</td>
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<tr>
<td>Geographic Zone Maintenance (SD.009.00)</td>
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<tr>
<td>• Define work zones or regions where services are performed</td>
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<tr>
<td>• Associate postal codes to each work zone or region</td>
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<tr>
<td>Branch Maintenance (SD.001.00)</td>
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<tr>
<td>• Define divisions or locations where services are performed for dispatching and reporting</td>
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<td>purposes</td>
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<tr>
<td>• Associate geographic zones to each branch</td>
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<td><strong>Call Type Maintenance (SD.003.00)</strong></td>
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<tr>
<td>• Define the types of services performed for reporting purposes</td>
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<tr>
<td>• If profit and loss statements are required for each division or line of business, associate a subaccount to each call type</td>
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<tr>
<td><strong>Pager Template (SD.031.00) (optional)</strong></td>
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<tr>
<td>• Define the data to be extracted from a service call and sent to technicians in the field during the paging process</td>
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<tr>
<td><strong>Vehicle Maintenance (SD.020.00) (optional)</strong></td>
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<tr>
<td>• Set up vehicles for tracking manufacturer information and odometer readings</td>
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<td>• If vehicle inventory tracking is used, associate the appropriate inventory site location to each vehicle</td>
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<tr>
<td>• Associate an employee to each vehicle</td>
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<tr>
<td><strong>Skills Maintenance (SD.017.00) (optional)</strong></td>
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<tr>
<td>• Define the skills or expertise required by technicians to complete the work of problem codes</td>
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<tr>
<td><strong>Tool Maintenance (SD.018.00) (optional)</strong></td>
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<tr>
<td>• Set up company-owned tools and equipment technicians use when performing services</td>
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<tr>
<td>• Associate each tool with an employee or inventory location</td>
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<tr>
<td><strong>Tool Usage Maintenance (SD.019.00) (Optional)</strong></td>
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<tr>
<td>• Define how tools are used</td>
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<tr>
<td><strong>Employee Class Maintenance (SD.006.00)</strong></td>
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<tr>
<td>• Define employee groups</td>
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<tr>
<td><strong>Employee Maintenance (SD.007.00)</strong></td>
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<tr>
<td>• Set up employees, volunteers, and subcontractors who perform work on service calls.</td>
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</table>
### Implementation Hints and Tips

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<th>Date Completed</th>
<th>Comments</th>
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<tbody>
<tr>
<td>• When the Payroll module is interfaced with Field Service Management, a service dispatch employee must be associated with an employee set up in Employee Maintenance (02.250.00) in the Payroll module. To associate a service dispatch employee to an employee in the Payroll module, enter the employee ID from the Payroll module in Payroll ID. Click the Copy Info button if you want to copy the employee information from the Payroll module to Service Dispatch to populate fields in this screen.</td>
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<tr>
<td>• Associate an employee class to each employee.</td>
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<tr>
<td>• Enter the employee’s email address if the Graphical Dispatch Board is implemented and email messages are sent to technicians (employees).</td>
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<tr>
<td>• When paging, associate a pager template and pager number.</td>
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<tr>
<td>• Select a default earnings type.</td>
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<tr>
<td>• Select a default work location.</td>
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<tr>
<td>• Attach skills that apply to each employee.</td>
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<tr>
<td>• Attach licenses that apply to each employee.</td>
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<tr>
<td>• Attach tools that apply to each employee.</td>
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<tr>
<td>• Associate employees to Geographic Zone(s) if the Graphical Dispatch Board is implemented.</td>
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</tbody>
</table>

**Dispatch - View Maintenance (SD.004.00)**
Set up call queues or views to determine how service calls are displayed on dispatching boards

**User Configuration (SD.000.01) (Optional)**
- Define a default call queue or view for each dispatcher or user

**Problem Code Maintenance (SD.008.00)**
- Define the reason service
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<th>Description</th>
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<tbody>
<tr>
<td>calls are generated</td>
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<tr>
<td>• If Flat Rate Pricing module is installed, associate Flat Rate prices that apply to each problem code</td>
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<tr>
<td>• Associate all call types that apply to each problem code</td>
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<tr>
<td>• Associate tool usage that apply to each problem code</td>
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<tr>
<td>• Associate skills that apply to each problem code</td>
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<td></td>
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<tr>
<td>• Associate licenses that apply to each problem code</td>
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<tr>
<td><strong>Cause Code Maintenance</strong> (SD.014.00) (Optional)</td>
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<tr>
<td>• Define why problem codes occur or why a piece of equipment is not working</td>
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<tr>
<td><strong>Resolution Code Maintenance</strong> (SD.015.00) (Optional)</td>
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<tr>
<td>• Define how technicians solve a problem or cause code</td>
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<tr>
<td><strong>Media Group Maintenance</strong> (SD.013.00) (Optional)</td>
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<tr>
<td>• Define marketing resource groups</td>
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<tr>
<td><strong>Media Buy Maintenance</strong> (SD.012.00) (Optional)</td>
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<tr>
<td>• Set up each marketing or advertising resource</td>
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<tr>
<td>• Associate with a media group</td>
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<tr>
<td><strong>Coop Advertising Information</strong> (SD.012.01) (Optional)</td>
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<tr>
<td>• Set up each cooperative advertising partner and the percentage share that each partner contributes to marketing resources</td>
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<tr>
<td><strong>Product Class Maintenance</strong> (SD.016.00) (Optional)</td>
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<tr>
<td>• Define additional informational to product classes set up in the Inventory module</td>
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<tr>
<td><strong>Dwelling Maintenance</strong> (SD.005.00) (Optional)</td>
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<tr>
<td>• Define the different type of building where services are performed</td>
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<tr>
<td><strong>Inventory Mark-Up Maintenance</strong></td>
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### Implementation Hints and Tips

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<td>(SD.026.00) (Optional)</td>
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<tr>
<td>- If Flat Rate Pricing module is installed, set up tables to increase the price of inventory items associated to flat rate prices when the cost of the inventory items increase</td>
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<td>Site Maintenance (SD.025.00)</td>
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<tr>
<td>- Set up all the locations of a customer</td>
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<tr>
<td>- If profit and loss statements are required by division or location, associated the appropriate subaccount to each site</td>
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<tr>
<td>- Associate a media source to each site</td>
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<tr>
<td>- Associate a default geographic zone for new service calls created for the customer site</td>
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<td>- Associate a branch for new service calls created for the customer site</td>
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<td>- Associate a tax or tax group to each site</td>
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<tr>
<td>- Attach a default call status for new service calls created for the customer site</td>
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<tr>
<td>- Associate an employee that primary performs the work for the customer site</td>
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<td>- Associate a salesperson for the customer site</td>
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<tr>
<td>Site - Special Pricing Maintenance (SD.037.00) (Optional)</td>
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<tr>
<td>- Create specific inventory item special pricing for customer sites</td>
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<tr>
<td>- Create revisions for future special prices</td>
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<tr>
<td>Notes Template (SD.410.00) (Optional)</td>
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<tr>
<td>- Set up note templates that can be attached to service call invoices</td>
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Service Dispatch Concepts

Service Call Life Cycle Overview

The Service Dispatch module is designed to track every detail of a service organization by providing complete automation of service call processing, dispatching, and service call completion or invoicing. When existing customers have issues and request services, customer service representatives can enter a service call into Service Call Entry (SD.200.00). Problem codes or the reasons a customer is requesting assistance can be attached to a service call. Users also have the option of setting up and attaching cause and resolution codes to the service call. Cause codes define the source of problems while resolution codes define what a technician did to resolve a problem.

Once the service call has been entered into the system, the service call can be viewed in the Dispatch (SD.201.00) to assign the appropriate technicians to perform the work. Dispatch (SD.201.00) is used to manage open and in-progress service calls by Service Call ID. Dispatch (SD.201.00) also allows users to send alphanumeric pages to technicians in the field.

To assist the dispatching department in assigning proper technicians in an efficient manner, geographic zones or work regions can be set up. These user-defined areas can be as broad or as specific as needed because one or an unlimited number of zip codes can be associated with a geographic zone. It is recommended that you define geographic zones because these work areas can reduce the travel time of technicians and decrease the waiting time for service of customers.

After the service call has been dispatched and technicians have performed the necessary work, the service call must be completed or invoiced. Invoice Entry (SD.202.00) allows users to enter billing information while Invoice - T & M Details (SD.203.00) allows users to enter the material and labor needed to complete the service call or job. The system provides two Service Type options when invoicing: Time & Material and Flat Rate Pricing. If the invoice is billable to the customer, the service call invoice process generates a batch of invoices in Invoice and Memo (08.010.00) in the Accounts Receivable modules and a COGS batch in Issues (10.010.00) in the Inventory module.

Note: You can run a report to assist with service call audits. For more information, see “Service Call Audit (SD.627.00)” on page 513.

Two other important processes in the Service Dispatch module are Generate Payroll Process (SD.302.00) and Generate Inventory (SD.306.00). Generate Payroll Process (SD.302.00) allows the hours worked by technicians on service calls to be integrated with Time and Dollar (02.020.00) of the Payroll module. If progress billing is needed, Generate Inventory (SD.306.00) allows users to create COGS batches for material and labor used to carry out a job in Issues (10.020.00) of the Inventory module. Generate Inventory (SD.306.00) does not complete the service call, the procedure sets the detail lines to processed and makes the line items inactive. Generate Inventory (SD.306.00) also gives users the capability to create purchase orders and receipts in the Purchasing module without having to complete service calls.

Dispatching

After service calls are entered into the system, the service calls can be displayed in Dispatch (SD.201.00) or Graphical Dispatch Board (SD.900.00). The dispatch board displays service calls based on call view templates set up in Dispatch - View Maintenance (SD.004.00). Call view templates can be created so that only service call records that meet specific criteria are included in a service call queue.

Example: A view can be set up to display only open and in-progress service calls that have a premium or high priority. Branch, Technician, Call Type, Call Status, and Geographic Zone are other criteria used to create specialized service call views.
When multiple branches or locations exist in an organization, call view templates are typically set up for each branch in the organization. The procedure of setting up a call view template for each branch decreases the possibility of assigning technicians in one location to service clients in another location.

**Example:** A company with locations in Cleveland, Columbus, Cincinnati, and Detroit may want to set up a call view queue for each location in order to eliminate the problem of sending Detroit service technicians to Cincinnati to complete a service call. If the user or dispatcher in Detroit can only view service calls for the Detroit location, the problem of assigning a technician for the Detroit location to a Cincinnati service call is eliminated.

### Using Dispatch (SD.201.00)

*Dispatch* (SD.201.00) is designed to give dispatching departments an efficient way to manage open and in-progress service calls for a date range by **Service Call ID**.

**Example:** Entering 09/27/00 in **To** and 09/27/00 in **From** displays open and in-progress service calls for September 27, 2000 by Service Call ID. While viewing the service calls in *Dispatch* (SD.201.00), dispatchers can assign the appropriate technicians to perform the work or change the technician already assigned to the service call.

Several predefined fields give dispatchers the ability to sort service call queues in ascending or descending order. Some of these predefined fields include **Branch ID**, **Call Status ID**, **Call Type ID**, **Caller Name**, **Customer Name**, **Date Entered**, **Date Promised**, **Time Promised**, **Geographic Zone**, **Priority**, **Service Call ID**, and **Service Technician**. Multiple sort criteria can be used in a service call queue.

Several other functions can be performed in *Dispatch* (SD.201.00), including:

- Modifying the sort and select options for displaying service call records,
- Accessing **Service Call Entry** (SD.200.00) to review the information of a selected service call.
- Reviewing status changes during the life cycle of a service call.
- Viewing, modifying, or entering problem codes for work to be performed on the service call.
- Sending an alphanumeric page to a technician in the field.
- Reviewing a list of the completed service calls associated with a selected customer.
- Accessing **Invoice Entry** (SD.202.00) for invoicing the work performed on a service call.
Using Graphical Dispatch Board (SD.900.00)

Graphical Dispatch Board (SD.900.00) is designed to give dispatching departments an efficient way to manage open and in-progress service calls by Technician or by Problem Code. Graphical Dispatch Board (SD.900.00) provides visual feedback using a color-coded Gantt chart format in the schedule pane. In addition, service call problem codes are organized by status using an easily-navigated tab arrangement.

Figure 2: Graphical Dispatch Board (SD.900.00), Dispatch Board tab

The following features and functionality should be noted for Graphical Dispatch Board (SD.900.00):

- Pager templates can be used to extract data from a service call to send to technicians in the field from Graphical Dispatch Board (SD.900.00).
- Dispatch call views created in Dispatch - View Maintenance (SD.004.00) are used to further filter the service calls displayed on Graphical Dispatch Board (SD.900.00).
- The following can be accessed directly from Graphical Dispatch Board (SD.900.00) by right-clicking on a problem code task bar in the schedule pane and selecting the appropriate item:
  - Service Call Entry (SD.200.00)
  - Service Call Status Log (SD.027.00)
  - Customer Site Location (SD.905.00)
  - Invoice Entry (SD.202.00)
  - Service Call History (SD.301.00)
  - Service Contract Summary (SD.900.01)
  - Service Call Search (SD.900.02)
  - Service Call Workorder (SD.625.00)
  - Technicians Page (SD.903.00)
  - Microsoft® Office Outlook® to send an email message to a customer
- Outlook to send an email message to a technician
- Employee Maintenance (SD.007.00)
- Employee Schedule (SD.904.00)

- **Graphical Dispatch Board** (SD.900.00) is problem code-oriented. Technicians are assigned to problem codes. Work and travel times are specified on each problem code.

- Users can drag and drop problem code task bars in **Graphical Dispatch Board** (SD.900.00). Start and stop times and assigned technicians can be changed easily. Users may “Bring to Front” or “Send to Back” stacked task bars.

- Users also can customize the **Graphical Dispatch Board** (SD.900.00), Dispatch Board tab display by dragging and dropping columns on the service call details pane to relocate them. The new column positions are then saved on the user’s workstation in the file ServCall.dte. If other changes are needed later, the ServCall.dte file can be deleted and the columns repositioned.

- Color-coded task bars quickly identify technicians not available for assignment on a given day.

**Technicians**

Technicians are employees, volunteers, and subcontractors that complete the work on a service call.

**Example:** A heating and air conditioning company installing a central air system in a new house would want to set up all employees assigned to the job in order to track the costs associated with the installation. Employees, volunteers, and subcontractors are entered into the system in **Employee Maintenance** (SD.007.00).

If the Payroll module is installed to process payroll for your employees, the employees also must be set up in **Employee Maintenance** (02.250.00) of the Payroll module. **Generate Payroll Process** (SD.302.00) creates a batch in **Time & Dollar** (02.020.00) of the Payroll module for all of the work hours and hourly pay rates entered during Invoice Entry (SD.202.00) for technicians.

**Employee ID** in **Employee Maintenance** (SD.007.00) does not need to be the same as **Employee ID** in **Employee Maintenance** (02.250.00) of the Payroll module. However, in order to have the Generate Payroll Process work correctly, **Payroll ID** in the **Employee Maintenance** (SD.007.00) must be populated with the Employee ID associated with the technician in the **Employee Maintenance** (02.250.00) of the Payroll module.

**Skills**

Skills are designed to track the expertise required by technicians to perform the work needed to complete problem codes on a service call. Skills are entered into the system in **Skills Maintenance** (SD.017.00) and attached to problem codes in **Problem Code Maintenance** (SD.008.00). Skills are also attached to employees in **Employee Maintenance** (SD.007.00).

Using the Employee Skills feature enables warning messaging during service call entry when assigning an employee who does not possess the necessary skills to perform the work on a service call.

**Example:** Assigning an electrician to a plumbing service call would display a warning message stating that the technician does not have the required skills.

**Licensing**

Licensing is designed to track business and employee licenses required by an organization to perform the work needed to complete problem codes on a service call. Licenses are entered into the system in **License Maintenance** (SD.010.00) and attached to problem codes in **Problem Code Maintenance** (SD.008.00). Licenses are also attached to employees in **Employee Maintenance** (SD.007.00).

Using the Employee Licensing feature enables warning messaging during service call entry when assigning an employee who does not possess the necessary license to perform the work on a service call.
Example: Assigning an apprentice electrician to a job that requires a special license would display a warning message stating that the technician does not have the required license to perform the work on a service call.

Since a license may be specific to a zip code, License - Zip Code Maintenance (SD.011.00) allows users to associate zip codes with licenses for informational purposes.

Tools

Tool Maintenance (SD.018.00) is used to set up and maintain an inventory of company-owned tools and equipment that technicians have on hand for completing work on a service call. Tools are attached to technicians in Employee Tool (SD.007.05) of Employee Maintenance (SD.007.00). Setting up tools also allows companies to track the availability of equipment and tools for each technician. Equipment being installed or repaired for customers are not considered tools.

Note: Company- and customer-owned equipment for preventive maintenance is entered into the system using Equipment Entry (SE.001.00), not Tool Maintenance (SD.018.00).
Service Dispatch Reference and ID Codes

Service Call ID

A service call is a document in the Service Dispatch module that is used to record information about customers and services that customers are requesting from organizations.

Example: A customer having a problem with an air conditioner blowing hot air may call a heating and air conditioning repair shop requesting an on-site visit from one of the service technicians. Service calls are entered into the system through Service Call Entry (SD.200.00) and are associated with a specific customer and site.

Once the customer and site have been selected, values attached to the customer site default to the service call. Customer service representatives can override default values such as scheduling information, call status, priority, start date, time promised, and primary technician. Several problem codes or reasons for the service call, along with notes or source documents specific to the issues, can be attached to the service call.

When all needed information is entered and the service call is saved, the system automatically assigns a Service Call ID if Auto Number Service Call is enabled in Service Series Setup Maintenance (SD.000.00). In addition, if Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the three-character Branch Abbreviation associated with the branch of the customer is added to the beginning of the Service Call ID.

You can view open service calls on the Open Service Call List (SD.620.00) report. See “Open Service Call List (SD.620.00)” on page 509 for more information.

Customer ID

To process transactions for consumers that purchase items or services from your organization, information about each customer must be set up in Customer Maintenance (08.260.00) of the Accounts Receivable module. Every customer has a unique ID that distinguishes that customer from all other customers in the database. Setting up the customer in Customer Maintenance (08.260.00) requires the Customer ID to be manually entered.

Possible customer ID formats include:

- A series of letters in the customer name (SMITHBOB for Robert Smith)
- Sequential numbers (234567, 234568, 234569, 234570, etc.)
- A branch number-customer number combination (001234567 for branch 001 and customer 234567)
- A branch number-customer name combination (001SMITH for branch 001 and SMITH for customer name)

Note: The Flexkey feature gives users the ability to divide customer IDs into segments to allow the production of more meaningful financial and management reports. The segments might represent a variety of information.

Example: Segments may be established for the customer class, territory, and company. Segments are defined in the Shared Information module using Flexkey Definition (21.320.00).

Service Dispatch gives users the ability to set up new customers in Service Call Entry (SD.200.00). By clicking on the New Customer tab in Service Call Entry (SD.200.00) and typing in the necessary information, new customers can be added to Accounts Receivable. When all of the needed information is entered and Create is clicked, the system automatically assigns a Customer ID if Auto Number Customer ID is enabled in Service Series Setup Maintenance (SD.000.00). In addition, if the Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the three-character Branch Abbreviation associated with the branch of the customer is added to the beginning of the Customer ID.
You can view customer IDs on the Accounts Receivable report Customers (08.650.00). For more information, see the Accounts Receivable online help or user guide.

**Customer Site ID**

All customers can have an unlimited number of locations where items can be shipped or where services can be performed. In the Service Dispatch module, these locations are considered sites. Although customers may have one central address for billing, multiple locations may exist where work is performed. There is a one-to-one relationship with a Customer ID and a billing address. There is a one-to-many relationship with a Customer ID and customer sites. Sites for a customer are manually entered in Site Maintenance (SD.025.00) and are an extension of shipping addresses in Accounts Receivable.

*Site ID* is a 10-character user-defined unique identifier for each site of a customer, set up in Shipping Addresses (08.262.00).

**Customer Site Group ID**

All customer sites can be linked in a customer site group ID so that you can process special pricing revisions and updates by a Customer Site Group ID instead of one customer site ID at a time.

You may want to group customer sites by physical region, by industry, by company size, or by any other descriptor. Each customer site can be in one or many customer site groups.

*Customer Site Group ID* is a 10-character user-defined unique identifier for each group of customer sites.

**Service Contract ID**

A Service Contract is a document in the Service Contracts module that is used by organizations to record information about customers, equipment, and types of service those organizations offer customers to cover on-site and off-site service commitments.

*Example:* An organization that sells heating and air conditioning units may offer Full or Partial Service Contracts to their customers to cover repairs or preventive maintenance on the pieces of equipment over a specified length of time.

Service Contracts are entered into the system through Service Contract Entry (SN.001.00) and are associated with a specific customer and site.

Once the customer and site have been selected, values attached to the customer site default to the service contract. Customer service representatives can override default values such as contract status, contract type, contract amount, contract start and expiration date, and renewal type. Independent revenue and billing schedules can also be assigned to each service contract. Several pieces of equipment can be associated with a service contract along with individual preventive maintenance schedules for each piece of equipment.

When all the needed information is entered and the service contract is saved, the system automatically assigns a Service Contract ID if Auto Number Contract ID is enabled in Service Series Setup Maintenance (SD.000.00). In addition, if Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the three-character Branch Abbreviation associated with the branch of the customer is added to the beginning of the Service Contract ID.

If Active Contract Notification in Service Series Setup Maintenance (SD.000.00) is activated, customer service representatives are notified of any sites that have active service contracts at the time the service call is entered into the system in Service Call Entry (SD.200.00). This feature allows organizations to respond to customer issues in a proper time frame when problems occur for customers covered by a service contract.

For a list of service contract IDs, use the Service Contract List (SN.601.00) report in the Service Contracts module. For more information, see the Service Contracts online help or user guide.
Equipment ID

A piece of equipment has a record in the database used to track information about both company- and customer-owned items.

**Example:** A heating and air conditioning organization may enter and associate heating and air conditioning units as customer-owned equipment and enter the service trucks as company-owned equipment. Equipment is entered into the system through **Equipment Entry (SE.001.00)**.

**Equipment Entry (SE.001.000)** allows users to enter pertinent information about a piece of equipment including the customer and site associated with the piece of equipment, the branch responsible for servicing the piece of equipment, the type of equipment, the vendor ID, the purchase date, and the purchase amount. Manufacturer information such as the manufacturer, model, serial number, and other warranty information can also be entered for a piece of equipment.

Once equipment has been entered into the system, customer service representatives can attach the equipment to a service call or service contract. **Equipment ID** in **Service Call Entry (SD.200.00)** allows users to enter the equipment to be serviced on a service call.

For a list of equipment IDs, use the **Equipment Information (SE.601.00)** report in the Equipment Maintenance module. For more information, see the Equipment Maintenance online help or user guide.

Invoice Number

Service Dispatch gives users the ability to choose one of three options for creating an invoice number in **Invoice Entry (SD.202.00)**:

- **Invoice:** The system automatically assigns the invoice number using the **Last Reference Number** in AR Setup (08.950.00) after the service call invoice is printed or sent electronically in **Service Call Invoice (SD.640.00)** or **Service Call Invoice (SSRS) (SD.643.00)** and saved to the system in **Service Invoice Printing - Keep/Delete (SD.642.00)**.

- **Manual:** Requires that a user-specified invoice number be typed into **Invoice/Memo Nbr** before the invoice information can be saved to the system in **Invoice Entry (SD.202.00)**.

- **Progress:** Allows users to invoice customers for material and labor used to perform work without closing the service call. Additional work and detail lines items can be added to the service call for invoicing. Therefore, multiple invoices can be created for one service call. **Progress** disables **Invoice/Memo Nbr** in **Invoice Entry (SD.202.00)** and assigns an invoice number to the printed invoices when generated using **Service Call Invoice (SD.640.00)** or **Service Call Invoice (SSRS) (SD.643.00)**.

**Note:** After an **Invoice** or **Manual** service call invoice is printed or sent electronically in **Service Call Invoice (SD.640.00)** or **Service Call Invoice (SSRS) (SD.643.00)** and saved to the system through **Service Invoice Printing - Keep/Delete (SD.642.00)**, the service call is considered completed. Once a service call is completed, no further changes can be made to the service call.

Geographic Zone ID

Geographic zones are used to represent work zones or regions where a company performs jobs or services. These user-defined areas are designed to help dispatching departments be efficient when assigning service technicians to a service call. Since a geographic zone can consist of one or an unlimited number of zip codes, geographic zones allow dispatchers to decrease the travel time of service technicians and thus reduce the customer’s waiting period.

Geographic zone IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Geographic zone IDs should be set up in a manner that is consistent and easy to identify. Geographic zone IDs are set up in **Geographic Zone Maintenance (SD.009.00)**.

**Note:** You can run a report that lists the geographic zones and their zip codes, and provides sales and other information by region and branch. For more information, see “**Geographic Zone List (SD.606.00)**” on page 506.
Branch ID
Branches are used to represent the different divisions or locations in an organization.

Example: An organization that has locations in Columbus, Cincinnati, and Cleveland may create a branch for each city.

A company that has a heating and an air conditioning division may set up a separate branch for each division. Organizations typically choose to separate locations or divisions by branch for reporting purposes. Open Service Call List (SD.620.00) is used to print open service calls for each branch in an organization.

Branch IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Branch IDs are set up in Branch Maintenance (SD.001.00). To view branch IDs, use the Branch List (SD.600.00) report. See “Branch List (SD.600.00)” on page 501 for more information.

Zip Codes
Postal zip codes along with geographic zones are designed to help dispatching departments be efficient when assigning service technicians to service calls. Although a geographic zone can consist of an unlimited number of zip codes, zip codes cannot be associated with multiple geographic zones. Associating zip codes to geographic zones allow dispatchers to decrease the travel time of service technicians and thus reduce the customer’s waiting period.

Associating zip codes with geographic zones saves time and reduces data entry errors when creating new customers in Service Call Entry (SD.200.00). When entering the zip code of the new customer, the geographic zone ID is populated with the appropriate value. An unlimited number of zip codes can be manually entered into Zip Code Maintenance (SD.021.00). Zip codes may also be downloaded from the Internet and populated into the system using the Transaction Import (98.500.00) utility.

To view zip codes that have been set up for use in Service Dispatch, use the Zip Code List (SD.618.00) report. See “Zip Code List (SD.618.00)” on page 538 for more information.

Call Type ID
Call Types are extremely important to the Service Dispatch system. Call types give organizations the ability to separate service calls or jobs by different divisions or lines of business. If organizations want to track the revenue and costs of each line of business in the company, subaccounts associated with the lines of business can be attached to the call types for general ledger purposes.

Example: If Heating, Plumbing, Electrical and Air Conditioning profit and loss statements need to be generated separately, developing a call type for each line of business and attaching the appropriate subaccount is required.

Call type IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, call types are alphabetical for easy recognition during data entry and reporting. Call type IDs are set up in Call Type Maintenance (SD.003.00) and can be viewed in the “Call Type List (SD.602.00)” on page 502.

Call Status ID
Call statuses are used to define the life cycle of a service call. The call status provides dispatchers and other users with information that tracks the progress of a service call. The system allows an unlimited number of user-defined call statuses that can be any combination of numbers and letters up to 10 characters. However, call status IDs are typically alphabetical for easy recognition during data entry and reporting.

Call statuses are set up in Call Status Maintenance (SD.002.00) and can be viewed in the “Call Status List (SD.601.00)” on page 501.
Problem Code ID
Problem codes are used to define the reason why a service call is generated. Unlike call types that have a one-to-one relationship with a line of business, multiple problem codes may exist for each call type.
Problem code IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Typically, problem codes are alphanumeric because multiple problem codes can exist for one call type.

Example: A HEATING call type can have HEAT01 - Emergency No Heat, HEAT02 - Change Air Filter, and HEAT03 - Emergency Cool Air Blowing.

Problem code IDs are set up in Problem Code Maintenance (SD.008.00) and can be viewed in the “Problem Code List (SD.634.00)” on page 509.

Cause Code ID
Cause codes are used to define why a Problem Code may occur or why a piece of equipment is not working.

Example: The cause of an air conditioner blowing warm air may be a Thermostat Inoperative.

An unlimited number of cause codes can be set up in Cause Code Maintenance (SD.014.00). Cause code IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

Resolution Code ID
Resolution codes are used to define what a technician does to solve a problem or cause code.

Example: The resolution code for a Thermostat Inoperative cause code may be Replaced Thermostat.

An unlimited number of resolution codes can be set up in Resolution Code Maintenance (SD.015.00). Resolution code IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

Technicians
Technicians are employees, volunteers, and subcontractors that complete the work on a service call.

Example: A heating and air conditioning company installing a central air system in a new house would want to set up all employees assigned to the job in order to track the costs associated with the installation. Employees, volunteers, and subcontractors are entered into the system in Employee Maintenance (SD.007.00).

Employee IDs are user-defined and can be any combination of numbers and letters up to 10 characters. It is recommended that you use the name of the employee as part of the Employee ID for easy recognition during data entry and reporting.

To view technician information, use the Employee Information (SD.604.00) report. See “Employee Information (SD.604.00)” on page 504 for more information.
Employee Class

Employee classes are typically designed to identify and group employees with similar characteristics for reporting purposes.

Example: A heating, plumbing, electrical and air conditioning company may want to group all plumbers into one class, electricians into another class, and heating and air specialists into another.

Employee classes are set up in Employee Class Maintenance (SD.006.00) and attached to employees in Employee Maintenance (SD.007.00). They can be viewed in “Employee Class List (SD.605.00)” on page 503. Employee class IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

Dispatch - Call View ID

Dispatch (SD.201.00) displays service calls based on call view templates set up in Dispatch - View Maintenance (SD.004.00). Call view templates are created so that only service call records that meet specific criteria are included in a service call queue.

Example: A view can be set up to display only open and in-progress service calls that have a premium or high priority.

Call view IDs are user-defined and can be any combination of numbers and letters up to 10 characters. It is recommended that you create alpha character IDs that identify specialized service call queues for easy recognition during dispatching.

Dwelling ID

Dwellings are used to represent the different type of buildings where organizations perform work.

Example: A heating and air conditioning company may want to track residential versus commercial buildings for reporting purposes. Dwelling types may also be set up by size or square footage of the building. For example, a company that sells swimming pools may want to mail a promotional brochure to all single family homes and skip all multiple family houses.

Dwelling IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Dwelling IDs are set up in Dwelling Maintenance (SD.005.00).

Note: You can run a report of all dwelling types. For more information, see “Dwelling List (SD.603.00)” on page 503.

Inventory Mark-Up ID

Inventory mark-up tables are used to increase the price of inventory items that are associated with a flat rate price. When running Price Update Process (SP.203.00) in the Flat Rate Pricing module, the system increases the price of individual inventory items associated with a flat rate by a cost multiplier based on the cost of the item.

Inventory mark-up IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Inventory mark-up IDs are set up in Inventory Mark-Up Maintenance (SD.026.00). You can run a report of the existing mark-up IDs. For more information, see “Inventory Mark-Up (SD.619.00)” on page 506.

License ID

Licensing is designed to track business and employee licenses required by an organization to perform the work that is needed to complete problem codes on a service call. Licenses are entered into the system in License Maintenance (SD.010.00) and attached to problem codes in Problem Code Maintenance (SD.008.00). Licenses are also attached to employees in Employee Maintenance (SD.007.00).
License IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Licenses are set up in License Maintenance (SD.010.00).

To view license ID information, use License List (SD.607.00) and License by Zip Code (SD.608.00). See “License List (SD.607.00)” on page 507 and “Zip Code List (SD.618.00)” on page 538.

**Media Buy ID**

The media buy feature provides users with the ability to track information about the different marketing programs that generate sales in an organization.

The Advertising Media Performance Report allows users to view the number of service calls and total revenue associated with each media source. For more information, see “Advertising Media Performance Report (SD.630.00)” on page 499. The different types of media are entered into the system in Media Buy Maintenance (SD.012.00).

You can run a report that lists the media codes and their associated information. For more information, see “Media Buy List (SD.610.00)” on page 508.

Media IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Although each customer is not really a media resource, setting up a media code for each referral is a great way to track how a service call was received.

**Media Groups**

Media groups are typically used to identify or group media with similar characteristics. Placing media resources into categories or groups can be beneficial to management because reports can be printed to show the most effective means of advertising. The different types of media groups are entered into the system in Media Group Maintenance (SD.013.00) and attached to media resources in Media Buy Maintenance (SD.012.00). For a list of media groups, see “Media Group List (SD.609.00)” on page 508.

Media group IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

**Skill ID**

Skills are designed to track the expertise required by technicians to perform the work needed to complete problem codes for a service call. Skills are entered into the system in Skills Maintenance (SD.017.00) and attached to problem codes in Problem Code Maintenance (SD.008.00). Skills are also attached to employees in Employee Maintenance (SD.007.00).

The employee skills feature enables warning messaging in Service Call Entry (SD.200.00) when assigning an employee that does not possess the necessary skills to perform the work on a service call.

Skill IDs are user-defined and can be any combination of numbers and letters up to 10 characters. You can run a report that lists all skill IDs. For more information, see “Skills List (SD.613.00)” on page 531.

**Tools**

Tool Maintenance (SD.018.00) is used to set up and maintain an inventory of company-owned tools and equipment that technicians have on hand for completing service calls. Tools are assigned to technicians in Employee Tool (SD.007.05) of Employee Maintenance (SD.007.00). Setting up tools also allows companies to track the availability of equipment and tools for each technician. For a list of tools, see “Tool List (SD.614.00)” on page 536.

Tool IDs are user-defined and can be any combination of numbers and letters up to 10 characters.
Tools Usage

Tool usage is designed to give dispatching departments the ability to confirm that technicians have the appropriate tools to perform the work of problem codes during Service Call Entry (SD.200.00). Usage codes are set up in Tool Usage Maintenance (SD.019.00) and attached to problem codes in Problem Code Maintenance (SD.008.00). For a list of tool usage codes, see “Tool Usage List (SD.615.00)” on page 536.

Tool usage IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

Note: Tool usage is for informational purposes only.

Vehicle ID

Vehicle records are set up in the system to track valuable information such as make, model, year, date purchased, and odometer readings of all vehicles used to provide service to customers.

Vehicle IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Vehicle IDs are set up in Vehicle Maintenance (SD.020.00).

Note: You can run a report that lists vehicle IDs and their associated information. For more information, see “Vehicle List (SD.617.00)” on page 538.

Pager Template ID

Pager templates are used to extract data from a service call to send to technicians in the field from Dispatch (SD.201.00).

Pager template IDs are user-defined and can be any combination of numbers and letters up to 10 characters. Pager templates are set up in Pager Template (SD.031.00). Open Pager Template (SD.031.00) by clicking Pager Configuration in Service Series Setup Maintenance (SD.000.00).

Note Template ID

Note templates are user-defined text that can be attached to an invoice in Invoice Entry (SD.202.00). Information in the note template appears on the bottom of a service call invoice. Note templates can also be attached to pieces of equipment in the Service Contract module.

Note template IDs are user-defined and can be any combination of numbers and letters up to 10 characters.

Earnings Type ID

Earnings Type ID, defined in Earnings Type Maintenance (SD.022.00), is important because it is associated with an earnings multiplier. Labor cost on a service call is computed using the following formula:

\[
\text{Work Hours} \times \text{Pay Rate} \times \text{Earnings Multiplier} = \text{Labor Cost}
\]

By setting up different earnings types with different earnings multipliers, you can control the labor cost calculation.

Work Location ID

Work Location ID is a unique alphanumeric code that identifies a service technician’s default job site (for example, a city abbreviation or warehouse name). You define work location IDs in Work Location Maintenance (SD.023.00). This screen is not available if the Payroll module is installed.
Task Guidelines

Quick Reference Task List
This list contains tasks that are commonly performed with the Service Dispatch module. Each task is cross-referenced to a specific page in the user guide.

How Do I...?

- Set up the Service Dispatch module? See “Setting up Service Dispatch” on page 46.
- Enter a service call? See “Entering a Service Call” on page 117.
- Send or resend an invoice electronically? See “Sending Invoices Electronically” on page 279.
- Create a new customer? See “Entering a New Customer during Service Call Entry” on page 129.
- Create a new customer site? See “Define New Customer Sites (SD.025.00)” on page 102.
- Cancel a service call? See “Canceling a Service Call” on page 137.
- Complete a service call? See “Printing a Service Invoice” on page 289.
- Charge a service call to a service contract? See “Entering Service Contract Material Inventory Line Items” on page 257 and “Entering Service Contract Labor Inventory Line Items” on page 261.
- Charge a service call to a project? See “Entering Project Material Inventory Line Items” on page 251 and “Entering Project Labor Inventory Line Items” on page 255.
- Record non-billable time and materials on a service call? See “Entering Non-Billable Labor Inventory Line Items” on page 249 and “Entering Non-Billable Material Inventory Line Items” on page 245.
- Record billable time and materials on a service call? See “Entering Billable Labor Inventory Line Items” on page 230.
- Track warranty repairs on a service call? See “Entering Manufacturer Warranty Material Inventory Line Items” on page 240 and “Entering Manufacturer Warranty Labor Inventory Line Items” on page 243.
- Create a new dispatch view? See “Define Dispatch View Templates (SD.004.00)” on page 81.
- View completed calls? See “Viewing Completed Service Calls” on page 149.
- Assign one or more technicians to a service call? See “Entering Technician Information on an Invoice” on page 277.
- View the history of status changes to a service call? See “Service Call Status Log (SD.027.00)” on page 357.
- View history for a site’s completed service calls? See “Service Call History (SD.301.00)” on page 365.
- View details of the Quick Send request created when an invoice is sent electronically? See “Viewing Details for Invoices Sent Electronically” on page 284.
- View open calls for this customer site? See “Viewing All Open Service Calls for a Specific Priority” on page 155.
- Search problem codes of open service calls? See “Search Problem Codes of Open Service Calls in Graphical Dispatch Board (SD.900.00)” on page 176.
- Page a technician? See “Paging with Graphical Dispatch Board (SD.900.00)” on page 193.
- Send email messages to customers? See “Sending Email Messages to Customers” on page 195.
• Send email messages to technicians? See “Sending Email Messages to Technicians” on page 198.
• Create an invoice for a service call without closing the call? See “Processing Independent of Call Completion” on page 211.
• Enter a time and materials invoice for a service call? See “Entering Time and Material Details” on page 225.
• Enter or modify a flat rate pricing invoice for a service call? See “Flat Rate Price Invoicing” on page 264.
• Assign a vehicle to a technician? See “Define Employees (SD.007.00)” on page 73.
• Associate an inventory site to a vehicle? See “Define Vehicles (SD.020.00) (Optional)” on page 66.
• Select service calls to be invoiced? See “Selecting Service Calls to be Invoiced” on page 285.
• Send or Resend Invoices Electronically. See “Sending Invoices Electronically” on page 279.
• Create item-specific special prices by customer site. See “Define Special Pricing (SD.037.00) (Optional)” on page 111.

Why...?
• Are problem codes not included in the possible values list on the service call entry screen? See “Problem Code Maintenance (SD.008.00)” on page 397.
• Is my service call not appearing on the Service Call Entry screen? See “Viewing Completed Service Calls” on page 149.
• Is a service call not appearing in the Dispatch Board screen? See “Dispatching” on page 25.

How Do I Define...?
• A branch? See “Set up Branches (SD.001.00)” on page 62.
• A geographic zone? See “Set up Geographic Zones (SD.009.00)” on page 60.
• A technician? See “Define Employees (SD.007.00)” on page 73.
• A call status? See “Define Call Statuses (SD.002.00)” on page 49.
• A problem code? “Define Problem Codes (SD.008.00)” on page 87.
• A call type? See “Define Call Types (SD.003.00)” on page 64.
• A special price? See “Define Special Pricing (SD.037.00) (Optional)” on page 111.

What...?
• Does the Handling field on Service Call Entry do? See “Handling” on page 296.
• Does the Handling field on Invoice Entry do? See “Handling” on page 316.

What Is the Difference Between...?
• A customer and a customer site? See “Differences Between Customers and Customer Sites” on page 9.
• A site subaccount and a call type subaccount? See “Site Subaccount versus Call Type Subaccount” on page 11.
• Time and Materials and Flat Rate invoices? See “Time & Material versus Flat Rate Pricing” on page 15.
Setup and Maintenance

Introduction to Setup and Maintenance
Setting up Service Dispatch involves two areas of module setup.
- Setting up the modules that integrate with Service Dispatch
- Setting up Service Dispatch – Overview

Setting up Other Microsoft Dynamics SL Modules
The first steps in setting up the Service Dispatch module are to perform the setup tasks for the other modules that interface with Service Dispatch.
- Shared Information
- General Ledger
- System Manager
- Accounts Receivable
- Inventory
- Purchasing
- Accounts Payable
- Payroll
- Project Controller
- Customization Manager
- Crystal Reports
- Application Server

Shared Information Module
The following screens must be completed before the Field Service Management modules can be set up.
1. Tax Maintenance (21.280.00) (Required)
   - Any Tax IDs used in Invoice Entry (SD.202.00) must have a Calculation Type of Document.
   
   Note: Sales tax is critical for Invoice Entry (SD.202.00) and is required when creating a new site for customers in Site Maintenance (SD.025.00). You can run a report that shows the taxable service calls for each tax ID. For more information, see “Use Taxes List (SD.628.00)” on page 537.

2. Tax Group Maintenance (21.340.00) (Optional)
3. Terms Maintenance (21.270.00) (Required)
4. Quick Send Setup (21.951.00) (Optional)

General Ledger Module
1. Chart of Accounts Maintenance (01.260.00) (Required)
2. General Ledger Setup (01.950.00) (Required)
3. Subaccounts Maintenance (01.270.00) (Required)
System Manager Module

1. **Users** (95.260.00) and **Groups** (95.280.00) (Optional)
   - Define all users in **Users** (95.260.00) and groups in **Groups** (95.280.00) along with passwords for all users.

2. **Access Rights** (95.270.00) (Optional)
   - Set the appropriate access rights for all Service Dispatch users and groups in **Access Rights** (95.270.00) for the Service Dispatch module.
   - Click **Preload** to open **Preload Screens** (95.270.01) and select Service Dispatch from the list to view the screens for the **Service Dispatch** module.
   - Specify the appropriate level of rights for each screen for each Service Dispatch user or group.

Accounts Receivable Module

1. **Statement Cycle** (08.280.00) (Required)
2. **Customer Class** (08.290.00) (Required)
3. **AR Setup** (08.950.00) (Required)
   - Select **Auto Reference Numbering** to have the system generate sequential invoice numbers during **Invoice Entry** (SD.202.00).
   - Set **Credit Checking Type** to Warning Only.
4. **Customer Maintenance** (08.260.00) (Required)
   - When converting customers from a legacy system, if the legacy system did not have a one-to-many relationship between customers and sites, the data may require modification before the conversion process. (Required)
   - Define customer Quick Send preferences, including designating additional contacts who will receive documents (Optional).
5. **Salesperson Maintenance** (08.310.00) (Required)
   - Define at least one salesperson such as “House.”

Inventory Module

1. **IN Setup** (10.950.00) (Required)
   - The **COGS Subaccount Source** drop-down list must be set to the Sales Transaction Subaccount option.
   - The **AR Clearing Subaccount** on the **Miscellaneous Accounts** tab is used by Service Dispatch when creating the customer accounts receivable side of a credit entry.
2. **Product Classes** (10.280.00) (Required)
   - If the Flat Rate Pricing module is installed, defining the product class IDs in a way that corresponds easily with the flat rate pricing scheme is suggested.
3. **Warehouse Bin Locations** (10.340.00) (Required)
4. **Unit Conversions** (10.650.00) (Required)
5. **Sites** (10.310.00) (Required)
   - If you want to track the inventory on service vehicles, set up an inventory site for each service vehicle.
   - The accounts defined on the **IN Accounts** tab are used by Service Dispatch.
   - The subaccounts defined on the **IN Accounts** tab are not used by Service Dispatch.
6. **Inventory Items** (10.250.00) (Required)
   - Type all labor hourly rates as non-stock inventory items. For any item entered as labor, the inventory account is actually an accrued wages payable account.
   - **Stock Base Price** defaults the unit price during flat rate entry and during invoicing.
   - Create one miscellaneous inventory item as taxable, such as Miscellaneous Materials - Taxable. This item is non-stock with a valuation method of user-specified.
   - Create one miscellaneous inventory item as non-taxable, such as Miscellaneous Materials - Non-taxable. This item is non-stock with a valuation method of user-specified. For example, when invoicing for equipment rented, you probably will not pay sales tax.

   **Note:** For all labor inventory items, the labels for the fields **Inventory Account** and **Sub** should be modified to **Invt/Wages Acct** and **Sub** using Customization Manager, as labor items are charged to the Accrued Wages Payable account.

   **Note:** Costing for labor items is determined as follows:
   - Inventory ID valuation method is Standard Cost: Labor will be costed at the standard cost.
   - Inventory ID valuation method is User-Specified, and Payroll Interface setting in **Service Series Setup Maintenance** (SD.000.00) is set to either Payroll or Advanced Payroll, and labor record was entered directly into **Invoice - T&M Details** (SD.203.00); Labor will be costed based on the **Pay Rate** value on the **Employee Personal Information** (SD.007.01) subscreen of **Employee Maintenance** (SD.007.00).
   - Inventory ID valuation method is User-Specified, and Payroll Interface setting in **Service Series Setup Maintenance** (SD.000.00) is set to either Payroll or Advanced Payroll, and labor record was originally entered in one of the Payroll time entry screens: Labor will be costed based on the payroll rate in the appropriate payroll module.
   - Inventory ID valuation method is User-Specified, and Payroll Interface setting in **Service Series Setup Maintenance** (SD.000.00) is set to either None or Other: Labor will be costed based on the **Pay Rate** value on the **Employee Personal Information** (SD.007.01) subscreen of **Employee Maintenance** (SD.007.00).

**Purchasing Module (Optional)**
1. **Purchase Order Setup** (04.950.00)
   - The following Purchasing screens integrate with Field Service Management modules.
     - **Receipt/Invoice Entry** (04.010.00)
       - The **Create Voucher for Receipt** check box is associated with **Service Series Setup Maintenance** (SD.000.00), **Voucher Receipts Option**.
     - **Purchase Orders** (04.250.00)

**Accounts Payable Module (Optional)**
1. **Accounts Payable Setup** (03.950.00)
   - Vouchers depend on the setup option in Service Dispatch.
2. **Vendor Maintenance** (03.270.00)
   - Associate with detail line items to create purchase orders, receipts, and vouchers.
Payroll Module (Optional)
1. Payroll Setup (02.950.00)
2. Employee Maintenance (02.250.00).
   - Work Location on the Defaults tab.
   - Earnings Type on the Defaults tab.
   - Pay Type on the Pay Info tab must be set to Hourly.
   - Std Unit Rate on the Pay Info tab is used for the default hourly pay rate. During Invoice Entry (SD.202.00), the hourly pay rate defaults from Employee Maintenance (SD.007.00).
3. Earnings Type Maintenance (02.270.00)
   - Pay Rate Multiplier should be associated with the employee's normal and overtime work hours.

Advanced Payroll Module (Optional)
1. Advanced Payroll Setup (58.950.00)
2. Union Rate Maintenance (58.270.00)
3. Shift Maintenance (58.260.00)
4. Labor Class Maintenance (58.250.00)
5. Prevailing Wage Rate Maintenance (58.280.00)
6. Employee Position/Rate Maintenance (58.290.00)

Project Controller (Optional)
Project Controller integration begins with the association of a service call with a project ID. When the service call is completed or being invoiced, a task ID must be associated with each line item that has a Line Type of Project. When labor and materials detail records are entered into Invoice Entry (SD.202.00), the values entered in Work Hours for labor records are pushed into Payroll Time and Dollar Entry (02.020.00) using Generate Payroll Process (SD.302.00). Material records are pushed into Issues (10.020.00) in Inventory. All records pushed from the detail screens of Invoice Entry (SD.202.00) that are associated with a project include the project and task IDs. In order to set up Project Controller, first set up revenue recognition, tasks, budgets, and integration with other modules.
The Project Controller screen, Flexible Key Maintenance (PA.FKM.00) integrates with the Field Service Management modules.
1. Project Setup
   - Set up revenue recognition
   - Set up tasks
   - Set up budgets
   - Set up integration with other modules
2. Employee Maintenance (02.250.00), Project Controller
3. Code File Maintenance
4. Flexible Key Maintenance (PA.FKM.00)
Customization Manager

Customization Manager gives users the ability to modify Service Dispatch screens to meet the accounting requirements of an organization. For example, new fields and controls can be added, data fields and objects can be hidden, and defaults values for data fields can be set. To make data entry more efficient, objects can be moved to other positions on a screen and the tab order of data fields can be modified.

Although there are no setup procedures required for the customization manager, the module must be purchased and installed separately in order to make modifications to Service Dispatch screens.

Crystal Reports

Crystal Reports gives users the ability to modify Service Dispatch reports to meet the accounting requirements of an organization. For example, new labels and fields can be added while data fields and objects can be removed.

Although there are no setup procedures required for Crystal Reports, the module must be installed in order to make modifications to Service Dispatch reports.

Application Server

Application Server gives users the ability to send Service Dispatch invoices to customers and additional receivers electronically via email or fax. Default Quick Send preferences for purchase orders and invoices created in Accounts Receivable, Order Management, Flexible Billings, Service Dispatch, and Service Contracts are defined on Quick Send Setup (21.951.00). Customer Quick Send preferences for each document type are defined on the Customer Maintenance (08.260.00), Quick Send tab. When invoices are printed on Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00), or reprinted on Reprint Service Call Invoice (SD.650.00), the customer’s and additional receivers’ Quick Send preferences for the Service Dispatch Invoice are reviewed to determine whether the invoice is to be printed or sent electronically via Application Server. For more information about setting up Quick Send, see “Setting up Quick Send” in the Shared Information online help or user guide.
Setting up Service Dispatch

Overview

The “Setting Up Service Dispatch” section provides an overview and detailed procedures explaining how to adapt the Service Dispatch module to your business needs and practices. Use the following general procedures to set up the Service Dispatch module. More detailed directions are provided for the following steps.

1. Define call statuses using Call Status Maintenance (SD.002.00)

   Call Status Maintenance (SD.002.00) is used to enter an unlimited number of call statuses and descriptions that define the life cycle of a service call.

2. Set up general service information using Service Series Setup Maintenance (SD.000.00)

   Service Series Setup Maintenance (SD.000.00) is used to set up regular business hours as well as determine the sequencing of key identifier codes, such as Customer ID, Service Call ID, Service Contract ID, and Equipment ID.

3. Set up licenses using License Maintenance (SD.010.00) (Optional)

   License Maintenance (SD.010.00) allows users to set up an unlimited number of licenses in the system that can be linked to technicians, problem codes, and zip codes.

4. Set up postal codes using Zip Code Maintenance (SD.021.00) (Optional)

   Zip Code Maintenance (SD.021.00) is used to set up an unlimited number of Postal Zip Codes to help dispatching departments be efficient when assigning service technicians to a service call in the dispatching screens.

5. Attach licenses to zip codes using License - ZIP Code Maintenance (SD.011.00) (Optional)

   License - ZIP Code Maintenance (SD.011.00) is used to associate licenses to zip codes in order to have the system display warning messages when a company no longer has a valid or active license to perform work in the zip code.

6. Set up geographic zones using Geographic Zone Maintenance (SD.009.00)

   Geographic Zone Maintenance (SD.009.00) is used to create an unlimited number of work zones or regions where a company performs jobs or services. These predetermined areas are designed to help dispatching departments be more efficient when assigning service technicians to a service call.

7. Set up branches using Branch Maintenance (SD.001.00)

   Branch Maintenance (SD.001.00) is used to set up an unlimited number of branches in the system. Branches are used to represent the different divisions or locations in an organization. For example, an organization that has locations in Columbus, Cincinnati, and Cleveland may create a branch for each city.

8. Define call types using Call Type Maintenance (SD.003.00)

   Call Type Maintenance (SD.003.00) is used to set up an unlimited number of call types that give users the ability to separate service calls or jobs for each division or line of business in an organization.

9. Create pager templates using Pager Template (SD.031.00) (Optional)

   Pager Template (SD.031.00) is used to define an unlimited number of paging templates used to extract data from a service call to send to technicians in the field from Dispatch (SD.201.00).

10. Define vehicles using Vehicle Maintenance (SD.020.00) (Optional)

    Vehicle Maintenance (SD.020.00) is used to create an unlimited number of vehicles in the system for tracking valuable information such as make, model, year, date purchased, and odometer readings.
11. Define skills using Skills Maintenance (SD.017.00) (Optional)
   Skills Maintenance (SD.017.00) is used to create an unlimited number of skills that are designed to track the expertise required by technicians to perform the work needed to complete a service call.

12. Define tools using Tool Maintenance (SD.018.00) (Optional)
   Tool Maintenance (SD.018.00) is used to set up and maintain an inventory of company-owned tools and equipment that technicians have on hand for completing service calls.

13. Define tool usage using Tool Usage Maintenance (SD.019.00)
   Tool Usage Maintenance (SD.019.00) is used to set up an unlimited number of tools usage to give dispatching departments the ability to confirm that technicians have the appropriate tools to perform the work of problem codes during Service Call Entry (SD.200.00).

14. Define employee classes using Employee Class Maintenance (SD.006.00)
   Employee Class Maintenance (SD.006.00) is designed to identify and set up groups of employees with similar characteristics for reporting purposes.

15. Define employees using Employee Maintenance (SD.007.00)
   Employee Maintenance (SD.007.00) is used to set up and maintain all employees, volunteers, and subcontractors who perform work on service calls.

16. Define dispatch view templates using Dispatch - View Maintenance (SD.004.00)
   Dispatch - View Maintenance (SD.004.00) is used to set up an unlimited number of call view templates in order to display service calls in Dispatch - View Maintenance (SD.004.00).

17. Set up templates and queues for users with User Configuration (SD.000.01) (Optional)
   User Configuration (SD.000.01) is used to define default dispatching view templates or service call queues for each user.

18. Define problem codes using Problem Code Maintenance (SD.008.00) (Optional)
   Problem Code Maintenance (SD.008.00) is used to set up an unlimited number of problem codes that define the reasons service calls are generated.

19. Define cause codes using Cause Code Maintenance (SD.014.00) (Optional)
   Cause Code Maintenance (SD.014.00) is used to set up an unlimited number of cause codes that define why a problem code may occur or why a piece of equipment is not working.

20. Define resolution codes using Resolution Code Maintenance (SD.015.00) (Optional)
   Resolution Code Maintenance (SD.015.00) is used to create an unlimited number of resolution codes that define what a technician does to solve a problem or cause code.

21. Define media groups using Media Group Maintenance (SD.013.00) (Optional)
   Media Group Maintenance (SD.013.00) is used to group similar marketing resources for reporting purposes to track the most effective means of advertising.

22. Define media sources using Media Buy Maintenance (SD.012.00) (Optional)
   Media Buy Maintenance (SD.012.00) is used to set up an unlimited number of marketing sources in order to track the most effective source of advertising.

23. Define advertising partners using Coop Advertising Information (SD.012.01)
   Coop Advertising Information (SD.012.01) is used to set up cooperative advertising partners and the percentage share amounts that the cooperative partners contribute to the marketing resources.

24. Define product classes using Product Class Maintenance (SD.016.00)
   Product Class Maintenance (SD.016.00) allows users to add Field Service Management-related information to the product classes created in the Inventory module.
25. Define dwellings using *Dwelling Maintenance* (SD.005.00) (Optional)

*Dwelling Maintenance* (SD.005.00) is used to create an unlimited number of dwelling types or building characteristics types in the system for reporting purposes. Dwellings are used to represent the different type of buildings where organizations perform work.

26. Define mark-up tables using *Inventory Mark-Up Maintenance* (SD.026.00) (Optional)

*Inventory Mark-Up Maintenance* (SD.026.00) is used to set up an unlimited number of inventory mark-up tables that increase the price of inventory items associated with a flat rate price. When running *Price Update Process* (SP.203.00) in the Flat Rate Pricing module, the system increases the price of individual inventory items of a flat rate price by a cost multiplier based on the cost of the item.

27. Define customer sites using *Site Maintenance* (SD.025.00)

*Site Maintenance* (SD.025.00) is used to set up an unlimited number of locations for customers. Service call defaults are entered into this screen so that customer service representatives can quickly enter a service call once a customer and site are selected.

28. Define special pricing parameters using *Site - Special Pricing Maintenance* (SD.037.00) (Optional)

*Site - Special Pricing Maintenance* (SD.037.00) allows users to create special pricing for specific inventory items for customer sites, including the ability to create revisions for future special prices.

29. Create note templates using *Notes Template* (SD.410.00) (Optional)

*Notes Template* (SD.410.00) allows users to set up an unlimited number of note templates to be attached to a service call for invoicing. These templates can also be attached to equipment in the Service Contracts module.
Define Call Statuses (SD.002.00)

_Call Status Maintenance_ (SD.002.00) is used to define IDs and descriptions that specify the life cycle of a service call. Call statuses provide dispatchers and other users with a monitoring system that tracks the progress of a service call. For example, _OPEN_, _ASSIGNED_, and _COMPLETED_ are three common call statuses.

The following data is required for all call statuses:

- **Call Status ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define call statuses:

1. Choose **Module | Service Dispatch | Call Status Maintenance** from the menu. _Call Status Maintenance_ (SD.002.00) displays.

2. Type the unique 10-character identifier for the call status in **Call Status ID**.
3. Type a 30-character explanation of the call status in **Description**.
4. If technicians are currently working on a service call for a call status, select the **Work in Progress** check box. _Work in Progress_ is for reporting purposes only.
5. Click **Save** on the toolbar.
6. Click **Close** on the toolbar.

**Note:** To view a list of call statuses, use “Call Status List (SD.601.00)” on page 501.
Set up General Information Using Service Series Setup Maintenance (SD.000.00)

Service Series Setup Maintenance (SD.000.00) is used to define general information and set default values used during data entry and invoicing. The information entered on this screen is designed to make data entry more efficient by reducing the amount of time needed to create transactions and reduce the number of data entry errors. This screen must be completed before Service Dispatch is used to enter a service call and print an invoice.

The following frames are required to complete Service Series Setup Maintenance (SD.000.00):

- **Business Hours** (Step 2)
- **General** (Steps 3 – 8)
- **Paging Service Information** (Step 9; Steps 10 – 11 if Step 9 is set to Wireless Office)
- **Service Call** (Steps 12 – 22)
- **Service Contract** (Steps 23 – 25)

Use the following procedure to set up general service series information:

1. Choose **Module | Service Dispatch | Service Series Setup Maintenance** from the menu. Service Series Setup Maintenance (SD.000.00) displays.

   ![Service Series Setup Maintenance (SD.000.00)](image)

   *Figure 4: Service Series Setup Maintenance (SD.000.00)*

   The **Business Hours** frame is used to define the range of hours an organization provides service to customers. These business hours are used in **Service Call Entry** (SD.200.00) in conjunction with the **Service Call Lead Time** and **Service Call Range Time** to calculate the **Promised Date**, the **Promised Time From**, and the **Promised Time To** of a service call.
2. Type the Hours of Operation From, Hours of Operation To, Service Call Lead Time, and Service Call Range Time.
   - The **Promised Date** of a service call is set to the date of the system when entered into *Service Call Entry* (SD.200.00).
   - The **Promised Time From** of a service call is calculated by adding the **Service Call Lead Time** to the time of the system.
   - The **Promised Time To** of a service call is calculated by adding the **Promised Time From** of a service call to the **Service Call Range Time**.
   - If a service call is entered after the indicated business hours, the **Promised Date** defaults to the next business day and the **Promised Time** defaults to the beginning of the next business day.
   - If a service call is entered before the indicated closing time, and the specified lead time creates a **Promised Time** after business hours, the system sets the **Promised Date** of the service call to the next business day and the **Promised Time** to the beginning of the next business day.

The **General** frame is used to define miscellaneous default information such as an option to add the branch abbreviations to the first three characters of reference codes used throughout the system. Other fields in this portion of the screen are used to determine interface options to Purchasing, Accounts Payable and Payroll.

**Example:**

- How purchase order numbers are assigned.
- If purchasing receipts are created when purchase orders are entered and released in *Invoice Entry* (SD.202.00).
- If accounts payable vouchers are created when purchase orders are created in *Invoice Entry* (SD.202.00).
- If the Payroll module is installed.

3. If your organization wants to add a corresponding branch abbreviation to the first three characters of the ID of new customers, service calls, equipment and service contracts, select **Auto-Number Branch Prefix**.

4. Establish how purchase order numbers are assigned when completing a service call in **PO Number Option**.
   - Automatic
   - Manual

5. Establish if a purchase order receipt will be created when a purchase order receipt from *Invoice Entry* (SD.202.00) is created in **Create Receipts on Purchase Orders**.
   - Yes
   - No

6. If your organization wants non-billable labor items and non-billable material line items to be calculated in the profitability and gross margin of service calls, select **Include Non-Billable Labor in Costs** and **Include Non-Billable T&M in Costs**.

7. Establish if an accounts payable voucher is created when a purchase order receipt from *Invoice Entry* (SD.202.00) is created in **Voucher Receipts Option**.
   - Always Voucher
   - Never Voucher
8. If Field Service Management is interfaced to Payroll, determine the type of payroll system in Payroll Interface.
   - None
   - Payroll
   - Advanced Payroll
   - Other

   The Paging Service Information frame specifies the type of paging software and subscriber information used if the company is sending alphanumeric pages from the dispatching screens.

9. If your organization intends to page technicians in the field, select the type of paging software that sends the alphanumeric pages in Service Type.
   - Wireless Office
   - None

10. If your organization intends to page technicians, select the type of subscriber information used by the paging software in Pager ID Info.
    - Employee ID
    - Pager PIN#

11. If your organization intends to page technicians, specify the path or directory that stores alphanumeric pages when creating text fields in Path.

   The Service Call frame defines default information for reference numbering schemes used throughout the system, such as how the IDs of customers and service calls are assigned and maintained.

   Other fields in this section indicate whether the alert system is activated during Service Call Entry (SD.200.00). If it is, customer service representatives are notified of any sites that have service contracts and any open service calls at the time a new service call is entered into the system.

12. If your company wants to use the same service call ID numbering sequence as the legacy system, type the last service call ID used in Last Service Call ID.

13. If your company wants to use the same customer ID numbering sequence as the legacy system, type the last customer ID used in Last Customer ID.

14. If your organization wants the system to automatically assign a customer ID once the Create button is clicked from the New Customer tab in Service Call Entry (SD.200.00), select Auto Number Customer ID.

15. Establish whether commissions must equal 100% of the Total Invoice amount when commissions are split over two or more technicians during Invoice Entry (SD.202.00) in if Split Commission Equal 100% is selected.
    - Split Commission Equal 100% is for reporting purposes only.

16. If your organization wants the system to notify customer service representatives of any customer sites that have active service contracts when entering a service call in Service Call Entry (SD.200.00), select Active Contract Notification.

17. If your organization wants the system to display all open service calls for a customer site when entering service calls in Service Call Entry (SD.200.00), select Enable Open Calls Alert.

18. Select Check Technician's Skills and Licenses to be alerted if a technician who is listed in the detail area of Service Call Entry (SD.200.00) does not have the skills or licenses needed for the call.
19. Type the call status assigned to the completed service call in Call Status on Completion.
   - If the call status ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.
     - To select a call status, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to modify information for an existing call status.
     - Clicking Insert on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to add new call statuses to the system.

20. Define the primary use of Service Dispatch in Primary Use Option.
   - Service Calls: this is the standard setting.
   - Work Orders: this setting will modify the behavior of the system when service calls are generated from a PM schedule.

21. Determine how the unit price is calculated for material in Material Markup Price On.
   - All Cost Types
   - Standard Cost Only
   - LIFO Cost Only
   - FIFO Cost Only
   - User Specified
   - Average

22. Determine how the unit price is calculated for labor in Labor Markup Price On.
   - All Cost Types
   - Standard Cost Only
   - LIFO Cost Only
   - FIFO Cost Only
   - User Specified
   - Average

The Service Contract frame is used to define how the IDs of service contracts are assigned and maintained.

23. If your company wants to use the same service contract ID numbering sequence as the legacy system, type the last service contract ID used in Last Contract ID.

24. If your organization wants the system to automatically assign a service contract ID once a service contract is saved in Service Contract Entry (SN.001.00), select Auto Number Contract ID.

25. If your organization wants the price of new service contracts to be automatically calculated by the system, select Auto Contract Price Calculation.

26. Click User Configuration. User Configuration (SD.000.01) displays.

   User Configuration (SD.000.01) is used to define default dispatching view templates or service call queues for each user. For example, if an organization has locations in Cleveland, Akron, and Columbus, a dispatching template can be set up to only show open service calls for each city or dispatcher for that city. Therefore, a dispatcher in Cleveland cannot view open service calls for Columbus and accidentally assign a technician located in Cleveland to complete the work for a customer in Columbus.

   Note: Completing User Configuration (SD.000.01) is an optional function in Service Dispatch. User Configuration (SD.000.01) cannot be set up until call view templates have been created in Dispatch - View Maintenance (SD.004.00).

27. Click OK.
28. Click **Pager Configuration**. **Pager Template** (SD.031.00) displays.

    **Note:** Completing **Pager Configuration** (SD.031.00) is an optional function in Service Dispatch.

    **Pager Template** (SD.031.00) is used to define the data that is extracted from the service call and sent to technicians in the field from **Dispatch** (SD.201.00) when the paging process is executed.

29. Click **OK** to close **Pager Template** (SD.031.00).

30. Click **Save** on the toolbar.

31. Click **Close** on the toolbar to close **Service Series Setup Maintenance** (SD.000.00).

### Set up Licenses (SD.010.00) (Optional)

**License Maintenance** (SD.010.00) allows users to set up an unlimited number of licenses required to complete a service call. Licenses can be linked to technicians, problem codes, and zip codes. When a license is attached to a problem, and the assigned technician does not have the license needed to complete the work, the system warns dispatchers during **Service Call Entry** (SD.200.00) and **Dispatch** (SD.201.00).

The following fields are required to complete **License Maintenance** (SD.010.00):

- **License ID** (Step 2)
- **Description** (Step 3: recommended)
- **License Type** (Step 4)

**Use the following procedure to set up licenses:**

1. Choose **Module | Service Dispatch | License Maintenance** from the menu.

    **License Maintenance** (SD.010.00) displays.

2. Type a unique 10-character ID for the license in **License ID**.

3. Type a 30-character explanation of the license in **Description**.

4. Establish the type of license in **License Type**.
   - Business
   - Employee

5. If the license type is business, type the date the license becomes valid in **Effective Date**.
6. If the license type is business, type the date the license expires or becomes invalid in **Expiration Date**.

7. Type the vendor number of the bureau that issues the license in **Issuing Agency**.
   - If the vendor number is unknown, press F3 or double-click the right mouse button. A list of all vendors set up in Vendor Maintenance (03.270.00) displays.
   - To select a vendor, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
   - Clicking **Insert** on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.
   - After a valid vendor from accounts payable is entered, the name of the vendor displays in **Name**.

8. Type the name of the bureau that issues the license in **Agency Description**.

9. Specify if a certificate is required for the license in **Certificate Required**.
   - Yes
   - No

10. Type the initial cost of the license in **Initial Amount**.

11. Type the numeric length of time the license is valid in **Initial Term**.

12. Establish the length of time the license is valid in the field to the right of **Initial Term**.
   - Days
   - Months
   - Years

13. Type the cost for renewing the license in **Renewal Amount**.

14. Type the numeric length of time for renewal of a license in **Renewal Term**.

15. Establish the length of time type in the field to the right of **Renewal Term**.
   - Days
   - Months
   - Years

16. Click **Save** on the toolbar.

17. Click **Close** on the toolbar.

**Note:** To view a list of license IDs, use “License List (SD.607.00)” on page 507.
Set up Postal Codes (SD.021.00) (Optional)

*Zip Code Maintenance* (SD.021.00) is used to enter postal zip codes. Postal zip codes along with geographic zones are designed to help dispatching departments be more efficient when assigning service technicians to a service call.

The following fields are required to complete *Zip Code Maintenance* (SD.021.00):

- **Zip Code** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to set up postal codes:

1. Choose **Module | Service Dispatch | Zip Code Maintenance** from the menu. The **Information** tab of *Zip Code Maintenance* (SD.021.00) displays.

2. Type the zip code in **Zip Code**.

3. Type a 30-character explanation of the zip code in **Description**.

4. Type the city of the zip code in **City**.

5. Type the county associated with the zip code in **County**.

6. Type the state associated with the zip code in **State**.
   
   - If the state is unknown, press F3 or double-click the right mouse button. A list of all states set up in *State/Province Maintenance* (21.290.00) displays.
     - To select a state or province, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **State List** accesses *State/Province Maintenance* (21.290.00), enabling you to modify information for an existing state or province.
     - Clicking **Insert** on the **State List** accesses *State/Province Maintenance* (21.290.00), enabling you to add new states/provinces to the system.

7. Type the map page associated with the zip code in **Map**.

8. Type the map page coordinates associated with the zip code in **Coordinates**.
9. Click the **Phones** tab. The **Phones** tab of *Zip Code Maintenance (SD.021.00)* displays.

![Figure 7: Zip Code Maintenance (SD.021.00), Phones tab](image)

10. Type the contact type for the phone number in **Type**.
11. Type the name of the contact associated with the phone number in **Contact**.
12. Type the phone number associated with the contact in **Phone Number**.
13. Click the **Business** tab. The **Business** tab of *Zip Code Maintenance (SD.021.00)* displays.

![Figure 8: Zip Code Maintenance (SD.021.00), Business tab](image)

14. If a business license is required for the zip code, type the license ID in **License ID**.
   - **Active** defaults to **Enabled** when selecting a license ID.
15. Click the **Employee** tab. The **Employee** tab of **Zip Code Maintenance** (SD.021.00) displays.

![Figure 9: Zip Code Maintenance (SD.021.00), Employee tab](image)

16. If technicians that perform work in the zip code require a license, type the license ID in **License ID**.

17. Click **Save** on the toolbar.

18. Click **Close** on the toolbar.

**Note:** To view a list of postal zip codes, see “Zip Code List (SD.618.00)” on page 538.
Attach Licenses to Zip Codes (SD.011.00) (Optional)

License - Zip Code Maintenance (SD.011.00) is used to associate licenses to zip codes in order to have the system display warning messages when a company no longer has a valid or active license to perform work in the zip code.

If licenses are attached to zip codes, you can run a report that shows licenses, by zip code. For more information, see “License - Zip Code List (SD.608.00)” on page 507 and “Zip Code List (SD.618.00)” on page 538.

The following fields are required to complete License - Zip Code Maintenance (SD.011.00):

- License ID (Step 2)
- Zip Codes (Step 6)

Use the following procedure to attach licenses to zip codes:

1. Choose Module | Service Dispatch | License - Zip Code Maintenance from the menu.

License - ZIP Code Maintenance (SD.011.00) displays.

2. Type the license ID that zip codes are associated with in License ID.
   - A list of available zip codes displays in Zip Code Available.
3. To restrict the available list of zip codes to a city, type a city name in City.
4. To restrict the available list of zip codes to a county, type a county name in County.
5. To restrict the available list of zip codes to a state/province, type a state or province in State.
   - If the state is unknown, press F3 or double-click the right mouse button. A list of all states/provinces set up in State/Province Maintenance (21.290.00) displays.
     - To select a state or province, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the State List accesses State/Province Maintenance (21.290.00), enabling you to modify information for an existing state or province.
     - Clicking Insert on the State List accesses State/Province Maintenance (21.290.00), enabling you to add new states/provinces to the system.
6. Select all the zip codes associated with this license and click Add.
7. Click Save on the toolbar.
8. Click Close on the toolbar.
Set up Geographic Zones (SD.009.00)

**Geographic Zone Maintenance** (SD.009.00) is used to create an unlimited number of geographic zones that is used to represent work zones or regions where a company performs jobs or services. These user-defined areas are designed to help dispatching departments be more efficient when assigning service technicians to a service call.

The following fields are required to complete Geographic Zone Maintenance (SD.009.00):

- **Geographic Zone ID** (Step 2)
- **Description** (Step 3: recommended)
- **Branch ID** (Step 6: recommended)

**Use the following procedure to set up geographic zones:**

1. Choose **Module | Service Dispatch | Geographic Zone Maintenance** from the menu. **Geographic Zone Maintenance (SD.009.00)** displays.

2. Type a unique 10-character ID for the geographic zone in **Geographic Zone ID**.

3. Type a 30-character name of the geographic zone in **Description**.

4. If a geographic zone has a technician that is primarily responsible for completing the work on a service call, then type a technician ID in **Technician Assigned**.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in **Employee Maintenance** (SD.007.00) displays.
     - To select a technician, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Employee PV Maintenance List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking **Insert** on the **Employee PV Maintenance List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new technicians to the system.

**Note:** **Number of Calls**, **Total Revenue**, and **Avg. Revenue/Call** are optional; they are for informational purposes only.
5. Type the **Branch ID** to create a one-to-one relationship between a geographic zone and branch.
   - If the branch ID is unknown, press `F3` or double-click the right mouse button. A list of all branches set up in *Branch Maintenance* (SD.001.00) displays.
     - To select a branch, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Branch Maintenance PV List* accesses *Branch Maintenance* (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking **Insert** on the *Branch Maintenance PV List* accesses *Branch Maintenance* (SD.001.00), enabling you to add new branches to the system.

6. Select all the zip codes that exist in the geographic zone in **Zip Code**.
   - If the zip code is unknown, press `F3` or double-click the right mouse button. A list of all zip codes set up in *Zip Code Maintenance* (SD.021.00) displays.
     - To select a zip code, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Possible Zip Code Assign to Zone PV List* accesses *Zip Code Maintenance* (SD.021.00), enabling you to modify information for an existing zip code.
     - Clicking **Insert** on the *Possible Zip Code Assign to Zone PV List* accesses *Zip Code Maintenance* (SD.021.00), enabling you to add new zip codes to the system.

7. Click **Save** on the toolbar.
8. Click **Close** on the toolbar.

**Note:** To view a list of geographic zone IDs, use “Geographic Zone List (SD.606.00)” on page 506.
Set up Branches (SD.001.00)

Branch Maintenance (SD.001.00) is used to set up an unlimited number of branches in the system. Branches are used to represent the different divisions or locations in an organization. At least one branch must be set up; it is recommended that you use branches for dispatching and reporting purposes.

The following fields are required to complete Branch Maintenance (SD.002.00):

- **Branch ID** (Step 2)
- **Branch Abbreviation** (Step 3)
- **Branch Name** (Step 4)
- **Company ID** (Step 5)

Use the following procedure to set up branches:

1. Choose **Module | Service Dispatch | Branch Maintenance** from the menu. Branch Maintenance (SD.001.00) displays.

2. Type a unique 10-character ID for the location or division in Branch ID.

3. Type a three-character abbreviation for the branch in Branch Abbreviation.
   - If Auto-Number Branch Prefix is selected in Service Series Setup Maintenance (SD.000.00), the branch abbreviation is added to the beginning of the ID for service calls, service contracts, and new customers.

4. Type the name of the location or division in Branch Name.

5. Type a company identifier to associate with the branch in Company ID.
   - If the company ID is unknown, press F3 or double-click the right mouse button. A list of all companies set up in Company List displays.
     - To select a company, highlight the ID and click OK, or double-click the ID.

6. Type the name of the branch manager or contact person for the branch in Attention.
7. Type the address for the branch in **Address**.
8. Type the city where the branch is located in **City**.
9. Type a two-character state abbreviation where the branch is located in **State**.
   - If the state is unknown, press F3 or double-click the right mouse button. A list of all states set up in State/Province Maintenance (21.290.00) displays.
   - To select a state or province, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **State List** accesses State/Province Maintenance (21.290.00), enabling you to modify information for an existing state or province.
   - Clicking **Insert** on the **State List** accesses State/Province Maintenance (21.290.00), enabling you to add new states/provinces to the system.
10. Type the zip code where the branch is located in **Zip**.
11. Type the country or region where the branch is located in **Country/Region**.
   - If the country or region is unknown, press F3 or double-click the right mouse button. A list of all countries or regions set up in Country/Region Maintenance (21.300.00) displays.
   - To select a country or region, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **Country/Region List** accesses Country/Region Maintenance (21.300.00), enabling you to modify information for an existing country or region.
   - Clicking **Insert** on the **Country/Region List** accesses Country/Region Maintenance (21.300.00), enabling you to add new countries or regions to the system.
12. Type the phone number for the branch in **Phone**.
13. Type the fax number for the branch in **Fax Number**.
14. Select all the geographic zones associated with the branch in **Geographic Zone ID**.
   - Geographic zones can only be associated with one branch.
   - If the geographic zone is unknown, press F3 or double-click the right mouse button. A list of all geographic zones set up in Branch/Zone Maintenance PV List displays.
   - To select a geographic zone, highlight the ID and click **OK**, or double-click the ID.

**Note:** Once you associate a geographic zone to a branch, the geographic zone no longer appears in the Branch/Zone Maintenance PV List.
15. Click **Save** on the toolbar.
16. Click **Close** on the toolbar.

**Note:** You can report on the branches you have defined. For more information, see “Branch List (SD.600.00)” on page 501.
Define Call Types (SD.003.00)

*Call Type Maintenance* (SD.003.00) is used to set up an unlimited number of call types that give users the ability to separate service calls or jobs for each division or line of business in an organization. For example, a heating and air conditioning company can set up a different call type for the heating and air conditioning divisions.

The following fields are required to complete *Call Type Maintenance* (SD.003.00):

- **Call Type ID** (Step 2)
- **Description** (Step 3)
- **Subaccount** (Step 5)

Use the following procedure to define call types:

1. Choose *Module | Service Dispatch | Call Type Maintenance* from the menu. *Call Type Maintenance* (SD.003.00) displays.

   ![Figure 13: Call Type Maintenance (SD.003.00)](image)

2. Type a unique 10-character ID for the call type in **Call Type ID**.
3. Type a 30-character explanation of the call type in **Description**.
4. If the subaccount associated with the customer site is to be used for the sales and costs of service calls, select **Use Sub from Site**.
5. If profit and loss statements are needed for each division or line of business, type a **Subaccount** for the sales and costs of a service call.
   - If the subaccount number is unknown, press F3 or double-click the right mouse button. A list of all subaccounts set up in *Subaccount Maintenance* (01.270.00) displays.
     - To select a subaccount, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Subaccount List** accesses *Subaccount Maintenance* (01.270.00), enabling you to modify information for an existing subaccount.
     - Clicking **Insert** on the **Active Subaccount List** accesses *Subaccount Maintenance* (01.270.00), enabling you to add new subaccounts to the system.
6. Click **Save** on the toolbar.
7. Click **Close** on the toolbar.

**Note:** To view a list of call type IDs, use “Call Type List (SD.602.00)” on page 502.
Create Pager Templates (SD.031.00) (Optional)

*Pager Configuration* (SD.031.00) is used to define the data extracted from a service call and sent to technicians in the field from *Dispatch* (SD.201.00) when the paging process is executed.

The following fields are required to complete *Pager Templates* (SD.031.00):

- **Template ID** (Step 3)
- **Description** (Step 4: recommended)

Use the following procedure to create pager templates:

1. Choose **Module | Service Dispatch | Service Series Setup Maintenance** from the menu. *Service Series Setup Maintenance* (SD.000.00) displays.
2. Click **Pager Configuration**. *Pager Template* (SD.031.00) displays.

![Figure 14: Pager Template (SD.031.00)](image)

3. Type a unique 10-character code that is referenced when sending an alphanumeric page to a technician in **Template ID**.
4. Type a 30-character explanation of the template ID in **Description**.
5. Select all the fields from **Available Fields** that are transmitted to technicians for the template ID and click **Add**.
   - Once fields are selected, clicking **Add** moves the fields to the **Selected Fields** column.
6. Click **Save** on the toolbar.
7. Click **OK** to close *Pager Template* (SD.031.00).
8. Click **Save** on the toolbar.
9. Click **Close** on the toolbar to close *Service Series Setup Maintenance* (SD.000.00).
Define Vehicles (SD.020.00) (Optional)

*Vehicle Maintenance* (SD.020.00) is used to create an unlimited number of vehicles in the system for tracking valuable information such as make, model, year, date purchased, and odometer readings. The following fields are required to complete *Vehicle Maintenance* (SD.020.00):

- **Vehicle ID** (Step 2)
- **Description** (Step 3: recommended)
- **Year** (Step 7)

Use the following procedure to define vehicles:

1. Choose **Module | Service Dispatch | Vehicle Maintenance** from the menu.
   
   *Vehicle Maintenance* (SD.020.00) displays.

   ![Vehicle Maintenance (SD.020.00)](image)

   **Figure 15: Vehicle Maintenance (SD.020.00)**

1. Type a unique 10-character ID for the vehicle in **Vehicle ID**.
2. Type a 30-character explanation of the vehicle in **Description**.
3. Type the manufacturer's identification number of the vehicle in **Manufacturer's VIN**.
4. Type the make of the manufacturer of the vehicle in **Make**.
5. Type the model of the manufacturer of the vehicle in **Model**.
6. Type the year the vehicle was manufactured in **Year**.
7. Type the date the vehicle was purchased in **Date Purchased**.
8. Type an inventory location to associate with the vehicle in **Vehicle Inventory Location**. If the location is unknown, press F3 or double-click the right mouse button. A list of all vehicle inventory locations set up in Sites (10.310.00) displays.
   - To select a vehicle inventory location, highlight the ID and click OK, or double-click the ID.
   - Clicking **Edit** on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing location.
   - Clicking **Insert** on the Inventory Location List accesses Sites (10.310.00), enabling you to add new vehicle inventory locations to the system.
9. Type the date when the odometer reading or mileage of the vehicle was recorded in **Date of Reading**.
10. Type the mileage of the vehicle to ensure proper maintenance of the vehicle in **Vehicle Odometer**.

11. Type the driver assigned to the vehicle at the time the mileage was recorded in **Employee ID**. If the employee ID is unknown, press F3 or double-click the right mouse button. A list of all employee IDs set up in **Employee Maintenance** (SD.007.00) displays.
   - To select a vehicle inventory location, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **Employee PV Maintenance List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing employee ID.
   - Clicking **Insert** on the **Employee PV Maintenance List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new employee IDs to the system.

12. Click **Save** on the toolbar.

13. Click **Close** on the toolbar.

**Note:** To view a list of vehicle IDs, use “Vehicle List (SD.617.00)” on page 538.
Define Skills (SD.017.00) (Optional)

Skills Maintenance (SD.017.00) is used to create an unlimited number of skills that track the expertise required by technicians to perform the work needed to complete problem codes on a service call. Skills are associated with problem codes in Problem Code Maintenance (SD.008.00) and technicians in Employee Maintenance (SD.007.00). If a technician is assigned to complete the work of a problem code in Service Call Entry (SD.200.00) and Dispatch (SD.201.00) and the technician does not have the appropriate skills, a warning message appears.

The following fields are required to complete Skills Maintenance (SD.017.00):

- **Skill ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define skills:

1. Choose *Module | Service Dispatch | Skills Maintenance* from the menu.

   *Skills Maintenance (SD.017.00)* displays.

   ![Skills Maintenance (SD.017.00)](image)

   *Figure 16: Skills Maintenance (SD.017.00)*

2. Type a unique 10-character ID for the skill in **Skill ID**.
3. Type a 30-character explanation of the skill in **Description**.
4. Type the cost amount for labor associated with the skill in **Labor Cost**.
   - **Labor Cost** is for informational purposes only.
5. Click **Save** on the toolbar.
6. Click **Close** on the toolbar.

**Note:** To view a list of skill IDs, use “Skills List (SD.613.00)” on page 531.
Define Tools (SD.018.00) (Optional)

*Tool Maintenance* (SD.018.00) is used to set up and maintain an inventory of company-owned tools and equipment that technicians have on hand for completing work on service calls.

**Note:** You can print a listing of tools and the information associated with them. For more information, see “Tool List (SD.614.00)” on page 536.

The following fields are required to complete *Tool Maintenance* (SD.018.00):

- **Tool ID** (Step 2)
- **Description** (Step 3: recommended)
- **Usage ID** (Step 14)

Use the following procedure to define tools:

1. Choose **Module | Service Dispatch | Tool Maintenance** from the menu. *Tool Maintenance* (SD.018.00) displays.

![Tool Maintenance (SD.018.00)](image)

**Figure 17: Tool Maintenance (SD.018.00)**

2. Type a unique 10-character ID for the tool in **Tool ID**.
3. Type a 30-character explanation of the tool in **Description**.
4. Type the vendor’s identification number or serial number associated with the tool in **VIN/Serial Number**.
5. Type the manufacturer associated with the tool in **Make**.
6. Type the model associated with the tool in **Model**.
7. Type the year the tool was manufactured in **Year**.
8. Type the date the tool was purchased in **Date Purchased**.
9. Select the condition of the tool in **Condition**.
   - Good
   - Fair
   - Poor
10. Type the date the tool was inspected in **Condition Date**.
11. Select the type of location for where the tool is located in **Location Type**.
   - Employee
   - Warehouse

12. If the **Location Type** of the tool is Warehouse, type the inventory site location of the tool in **Location**.
   - If the inventory location must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses Sites (10.310.00), enabling you to add new inventory location to the system.

13. If the **Location Type** of the tool is Employee, type the ID of the technician that has possession of the tool in **Employee ID**.
   - If the employee ID is unknown, press F3 or double-click the right mouse button. A list of all employee IDs set up in Employee Maintenance (SD.007.00) displays.
     - To select a vehicle inventory location, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Employee PV Maintenance List** accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing employee ID.
     - Clicking **Insert** on the **Employee PV Maintenance List** accesses Employee Maintenance (SD.007.00), enabling you to add new employee IDs to the system.

14. Associate a tool usage for the tool in **Usage ID**.
   - If the usage ID is unknown, press F3 or double-click the right mouse button. A list of all tool usage IDs set up in Tool Usage Maintenance (SD.019.00) displays.
     - To select a tool usage ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Tool Usage Maintenance PV List** accesses Tool Usage Maintenance (SD.019.00), enabling you to modify information for an existing tool usage.
     - Clicking **Insert** on the **Tool Usage Maintenance PV List** accesses Tool Usage Maintenance (SD.019.00), enabling you to add new tool usages to the system.

15. Click **Save** then **Close** on the toolbar.

**Note:** To view a list of tool IDs, use “Tool List (SD.614.00)” on page 536.
Define Tool Usage Maintenance (SD.019.00) (Optional)

*Tool Usage Maintenance* (SD.019.00) is used to set up an unlimited number of usages of tools to give dispatching departments the ability to confirm that technicians have the appropriate tools to perform the work of problem codes during *Service Call Entry* (SD.200.00).

The following fields are required to complete *Tool Usage Maintenance* (SD.019.00):

- **Usage ID** (Step 2)
- **Description** (Step 3: recommended)

**Use the following procedure to define tool usage:**

1. Choose **Module | Service Dispatch | Tool Usage Maintenance** from the menu. *Tool Usage Maintenance* (SD.019.00) displays.

2. Type a unique 10-character ID for the tool usage in **Usage ID**.
3. Type a 30-character explanation of the tool usage in **Description**.
4. Click **Save** on the toolbar.
5. Click **Close** on the toolbar.

**Note:** To view a list of tool usage IDs, use “Tool Usage List (SD.615.00)” on page 536.
Define Employee Classes (SD.006.00)

*Employee Class Maintenance* (SD.006.00) is designed to identify and set up groups of employees with similar characteristics for reporting purposes. Each employee entered into *Employee Maintenance* (SD.007.00) is assigned to one employee class.

The following fields are required in *Employee Class Maintenance* (SD.006.00):

- **Employee Class ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define employee classes:

1. Choose **Module | Service Dispatch | Employee Class Maintenance** from the menu.
   
   *Employee Class Maintenance* (SD.006.00) displays.

2. Type a unique 10-character ID for the employee class in **Employee Class ID**.
3. Type a 30-character explanation of the employee class in **Description**.
4. Type **Yes** if the employee class is eligible to be paid commission in **Commission Paid**.
   - **Commission Paid** is optional and is for informational purposes only.
5. Click **Save** on the toolbar.
6. Click **Close** on the toolbar.

**Note:** You can run a report that shows all employee classes with their descriptions and commissions paid indicator. For more information, see “Employee Class List (SD.605.00)” on page 503.
Define Employees (SD.007.00)

Employee Maintenance (SD.007.00) is used to set up and maintain information about employees, volunteers, and subcontractors that will perform work on service calls.

You must complete the following required fields:

- Employee ID (Step 2)
- Payroll ID (Step 3)
- First Name (Step 4)
- Last Name (Step 6)
- Employee Class (Step 14)

To define employees:

1. Choose Module | Service Dispatch | Employee Maintenance from the menu.

Employee Maintenance (SD.007.00) appears.

Figure 20: Employee Maintenance (SD.007.00) -- Service Dispatch is not integrated with the Payroll module
Note: Payroll ID and the Copy Info button appear only if Service Dispatch is integrated with the Payroll module.

Figure 21: Employee Maintenance (SD.007.00) – Service Dispatch is integrated with the Payroll module

2. Type a unique 10-character ID for the employee in Employee ID.
3. If Payroll ID and the Copy Info button appear, perform the following steps, and then go to Step 14 to continue this procedure. Otherwise, proceed to Step 4 below.
   a) In Payroll ID, type the employee ID found in Payroll Employee Maintenance (02.250.00).
   b) (Optional) Click Copy Info. The employee's information from the Payroll module appears in Employee Maintenance (SD.007.00).

Note: The payroll ID appears in Employee Personal Information (SD.007.01), which you can access by clicking Personal Info in Employee Maintenance (SD.007.00).

4. Type the first name of the employee in First Name.
5. Type the middle initial of the employee in M.I.
6. Type the last name of the employee in Last Name.
7. Select the status for the new employee from Status list.
   - Inactive
   - Active
   - Vacation
   - Sick
   - Personal
8. Type the home address of the employee in Address Line 1.
   - Use the second line of Address if necessary; for example, add apartment number, post office box information, etc.
9. Type the city for the home address of the employee in City.
10. Type the 2-character state code for the home address of the employee in State.
   - If the state is unknown, press F3 or double-click the right mouse button. A list of all states set up in State/Province Maintenance (21.290.00) displays.
     - To select a state or province, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the State List accesses State/Province Maintenance (21.290.00), enabling you to modify information for an existing state or province.
     - Clicking Insert on the State List accesses Zip Code Maintenance (SD.021.00), enabling you to add new states/provinces to the system.

11. Type the zip code for the home address of the employee in Zip Code.
   - If the zip code is unknown, press F3 or double-click the right mouse button. A list of all zip codes set up in Zip Code Maintenance (SD.021.00) displays.
     - To select a zip code, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Zip Code Maintenance PV List accesses Zip Code Maintenance (SD.021.00), enabling you to modify information for an existing zip code.
     - Clicking Insert on the Zip Code Maintenance PV List accesses Zip Code Maintenance (SD.021.00), enabling you to add new zip codes to the system.

12. Type the social security number of the employee in Social Security No.
13. Type the birth date of the employee in Date of Birth.
14. Establish the default employee class for the employee in Employee Class.
   - If the employee class is unknown, press F3 or double-click the right mouse button. A list of all employee classes set up in Employee Class Maintenance (SD.006.00) displays.
     - To select an employee class, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Class Maintenance PV List accesses Employee Class Maintenance (SD.006.00), enabling you to modify information for an existing employee class.
     - Clicking Insert on the Employee Class Maintenance PV List accesses Employee Class Maintenance (SD.006.00), enabling you to add new employee classes to the system.

15. Associate a default branch for the employee in Branch ID.
   - If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branch IDs set up in Branch Maintenance (SD.001.00) displays.
     - To select a branch ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch ID.
     - Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new Branch IDs to the system.

16. Type the home phone number of the employee in Home Phone No.
17. Type the pager number or PIN number of the employee in Pager No./PIN.
   - Pager No./PIN defaults when you page a technician.
18. Type the email address of the employee in E-mail Address if Service Dispatch is not integrated with the Payroll module or the modules are integrated but the employee information was not copied using the Copy Info button. Otherwise, the information found in Email Address on the Payroll Employee Maintenance (02.250.00) screen appears.
   - When you send an email message to a technician, the information in E-mail Address appears on the message To line.
19. Associate a valid inventory site for the employee in **Default Inventory Site**.
   - If the inventory site is unknown, press F3 or double-click the right mouse button. A list of all inventory sites set up in Site Maintenance (10.310.00) displays.
     - To select an inventory site, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Site List** accesses Site Maintenance (10.310.00), enabling you to modify information for an existing inventory site.
     - Clicking **Insert** on the **Site List** accesses Site Maintenance (10.310.00), enabling you to add new inventory sites to the system.

20. Type a pager template for the employee in **Template ID**.
   - If the pager template ID is unknown, press F3 or double-click the right mouse button. A list of all pager templates set up in Pager Template PV List displays.
     - To select a pager template, highlight the ID and click **OK**, or double-click the ID.

21. Type the supervisor for the employee in **Supervisor**.
   - If the employee ID is unknown, press F3 or double-click the right mouse button. A list of all employee IDs set up in Employee Maintenance (SD.007.00) displays.
     - To select a vehicle inventory location, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Employee PV Maintenance List** accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing employee ID.
     - Clicking **Insert** on the **Employee PV Maintenance List** accesses Employee Maintenance (SD.007.00), enabling you to add new employee IDs to the system.

22. Click the **Other Phone** button. **Employee Other Phone** (SD.007.02) displays.

![Image: Employee Other Phone (SD.007.02)]

23. Type the description for the additional phone numbers for the employee in **Description**.
24. Type additional phone numbers for contacting the employee in **Phone Number**.
25. Click **OK** to close **Employee Other Phone** (SD.007.02).
26. Click the **Personal Info** button. *Employee Personal Information* (SD.007.01) displays.

![Employee Personal Information (SD.007.01)](image)

**Figure 23: Employee Personal Information (SD.007.01)**

27. Type the extension for the office phone number of the employee in **Office Phone Ext**.
28. Type the worker’s compensation department assigned to the employee in **Worker’s Comp. Dept**.
   - If the department is unknown, press F3 or double-click the right mouse button. A list of all departments set up in **Code List** displays.
   - To select a worker’s compensation department, highlight the ID and click **OK**, or double-click the ID.
29. Select the gender of the employee in **Sex**.
   - Male
   - Female
30. Select the marital status of the employee in **Marital Status**.
   - Married
   - Single
31. Type the number of exemptions claimed by the employee in **Exemptions**.
32. If **Payroll Interface** in *Service Series Setup Maintenance* (SD.000.00) is set to Payroll or Advanced Payroll, the display-only field **Payroll ID** shows the ID of the employee entered in *Employee Maintenance* (02.250.00).
33. If **Payroll Interface** in *Service Series Setup Maintenance* (SD.000.00) is set to Advanced Payroll, **Send Time To** indicates whether labor time is sent to Payroll or Advanced Payroll.
34. Type the driver license number of the employee in **Driver’s License No.**
35. Type the expiration date of the employee’s driver license in **Expiration Date**.
36. Type the state or province that issued the driver’s license of the employee in **Issuing State**.
   - If the state is unknown, press F3 or double-click the right mouse button. A list of all states set up in **State/Province Maintenance** (21.290.00) displays.
   - To select a state or province, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **State List** accesses **State/Province Maintenance** (21.290.00), enabling you to modify information for an existing state or province.
   - Clicking **Insert** on the **State List** accesses **State/Province Maintenance** (21.290.00), enabling you to add new states/provinces to the system.
37. Type the ID of the vehicle assigned to the employee in Assigned Vehicle ID.
   - If the vehicle ID is unknown, press F3 or double-click the right mouse button. A list of all vehicles set up in Vehicle Maintenance (SD.020.00) displays.
     - To select a vehicle ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Vehicle Maintenance PV List accesses Vehicle Maintenance (SD.020.00), enabling you to modify information for an existing vehicle.
     - Clicking Insert on the Vehicle Maintenance PV List accesses Vehicle Maintenance (SD.020.00), enabling you to add new vehicles to the system.

38. Designate the pay type associated with the employee in Pay Type.
   - Commission
   - Hourly
   - Salaried

39. Select a default earnings type for the employee in Earnings Type.
   - Earnings Type defaults from Invoice - T & M Details (SD.203.00) when a technician is associated with a labor line item.
   - If the earnings type ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in Earnings Type Maintenance (02.270.00) in the Payroll module displays.
     - To select an earnings type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Earnings Type List accesses Earnings Type Maintenance (02.270.00), enabling you to modify information for an existing earnings type.
     - Clicking Insert on the Earnings Type List accesses Employee Maintenance (SD.007.00), enabling you to add new earning types to the system.

40. Type a default work location for the employee in Work Location.
   - Work Location defaults from Invoice - T & M Details (SD.203.00) when a technician is associated with a labor line item.
   - If the work location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all work location set up in Work Location Maintenance (02.280.00) displays.
     - To select a work location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Work Location Maintenance List accesses Work Location Maintenance (02.280.00), enabling you to modify information for an existing work location.
     - Clicking Insert on the Work Location Maintenance List accesses Work Location Maintenance (02.280.00), enabling you to add new work locations to the system.

41. Type the department the employee is assigned to in Department.

42. Type a pay rate for the employee in Pay Rate.
   - Pay Rate defaults from Invoice - T & M Details (SD.203.00) when a technician is associated with a labor line item.

43. Type a date the employee was hired in Date Hired.

44. Type the date the employee last received a raise in Date of Last Raise.

45. Type the total amount of sales to be generated by the employee in Sales Quota.

46. Click OK to close Employee Personal Information (SD.007.01)
47. Click the **Skills** button. *Employee Skills Information* (SD.007.03) displays.

![Employee Skills Information (SD.007.03)](image)

**Figure 24: Employee Skills Information (SD.007.03)**

48. Select all the skills the employee has in **Skill ID**.

- If the skill ID is unknown, press F3 or double-click the right mouse button. A list of all skill IDs set up in *Skills Maintenance* (SD.017.00) displays.
  - To select a skill ID, highlight the ID and click **OK**, or double-click the ID.
  - Clicking **Edit** on the *Skills Maintenance PV List* accesses *Skills Maintenance* (SD.017.00), enabling you to modify information for an existing skill ID.
  - Clicking **Insert** on the *Skills Maintenance PV List* accesses *Skills Maintenance* (SD.017.00), enabling you to add new skill IDs to the system.

49. Type a numeric value to rate the proficiency the employee has in skills in **Rating**.

- **Rating** is for informational purposes only.

50. Click **OK** to close *Employee Skills Information* (SD.007.03).

51. Click the **Licenses** button. *Employee License Information* (SD.007.04) displays.

![Employee License Information (SD.007.04)](image)

**Figure 25: Employee License Information (SD.007.04)**

52. Select all the licenses the employee has in **License ID**.

- If the license ID is unknown, press F3 or double-click the right mouse button. A list of all license IDs set up in *License Maintenance* (SD.010.00) displays.
  - To select a license ID, highlight the ID and click **OK**, or double-click the ID.
  - Clicking **Edit** on the *Employee License Maintenance PV List* accesses *License Maintenance* (SD.010.00), enabling you to modify information for an existing license ID.
  - Clicking **Insert** on the *Employee License Maintenance PV List* accesses *License Maintenance* (SD.010.00), enabling you to add new license IDs to the system.

53. Type the date the license of the employee becomes valid in **Effective Date**.

- A warning is displayed when a technician without the proper credentials is assigned to a problem code that requires a particular skill or license.

54. Type the date the license of the employee becomes invalid in **Expiration Date**.

- A warning is displayed when a technician without the proper credentials is assigned to a problem code that requires a particular skill or license.
55. Click **OK** to close *Employee License Information (SD.007.04)*.

56. Click the **Tool** button. *Employee Tool (SD.007.05)* displays.

![Figure 26: Employee Tool (SD.007.05)](image)

57. Select all of the company-owned tools given to the employee to perform work in **Tool ID** in the Tool frame.

   - If the tool ID is unknown, press F3 or double-click the right mouse button. A list of all tool IDs set up in *Tool Maintenance (SD.018.00)* displays.
     - To select a tool ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Tool Maintenance PV List** accesses *Tool Maintenance (SD.018.00)*, enabling you to modify information for an existing tool ID.
     - Clicking **Insert** on the **Tool Maintenance PV List** accesses *Tool Maintenance (SD.018.00)*, enabling you to add new tool IDs to the system.

58. Click **Add** to display the tool in the Add Tool frame.

59. Click **OK** to close *Employee Tool (SD.007.05)*.

60. Click **Save** on the toolbar.

61. Click **Close** on the toolbar.

**Note:** To view a list of employee information, use “Employee Information (SD.604.00)” on page 504.
Define Dispatch View Templates (SD.004.00)

*Dispatch* (SD.201.00) enables users to perform the functions related to viewing open service calls after the calls have been entered into *Service Call Entry* (SD.200.00). *Service Dispatch* allows dispatching departments to manage open service calls efficiently because the system gives users the flexibility to view open service calls in a variety of ways. For example, users can set up one call view template to only display service calls for one branch, a second call view to display only service calls for one technician, and another call queue to only display service calls with a high priority.

Dispatching a service call is a two-step process. First, users have to set up call view templates. *Dispatch - View Maintenance* (SD.004.00) allows users to set up an unlimited number of call viewing queues in order to display open service calls in a number of ways using *Dispatch* (SD.201.00), the second step in the dispatching process.

The following fields are required to complete *Dispatch - View Maintenance* (SD.004.00):

- Call View (Step 2)
- Description (Step 3: recommended)

Use the following procedure to define dispatch view templates:

1. Choose Module | Service Dispatch | Dispatch - View Maintenance from the menu.
   *Dispatch - View Maintenance* (SD.004.00) displays.

2. Type a unique 10-character ID for the call view template or queue in Call View.
3. Type a 30-character explanation of the call view template or queue in Description.
   - Description allows users to enter a 30-character explanation of the service call view template.
4. In the Priority frame, choose the priority of the service calls viewed with the call view template.
   - Premium
   - High
   - Medium
   - Low

   **Note:** Multiple priority values can be selected for a call view template.
5. Select the All check box to the right of Branch ID to view open service calls for all branches.
6. To restrict the call view template to display open service calls for a specific branch, type the appropriate branch in Branch ID.
7. If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in Branch Maintenance (SD.001.00) displays.
   - To select a branch ID, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch.
   - Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new branches to the system.

8. Select All to the right of Technician ID to view the open service calls for all technicians.

9. To restrict the call view template to display open service calls for a specific technician, type a technician ID in Technician ID.

10. If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
    - To select a technician ID, highlight the ID and click OK, or double-click the ID.

11. To restrict the call view template to display open service calls for a specific call type, click Call Type.
    Call Type (SD.004.005) displays.

12. Type a call type.
    - Multiple Call Types can be selected for a call view template.
    - If the call type ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in Call Type Maintenance (SD.003.00) displays.
      - To select a call type, highlight the ID and click OK, or double-click the ID.
      - Clicking Edit on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to modify information for an existing call type.
      - Clicking Insert on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to add new call types to the system.

13. Click OK.

14. To restrict a call view template to a specific call status, click Call Status.
    Call Status (SD.004.06) displays.
15. Type a call status.
   - Multiple call statuses can be selected for a call view template.
   - If the call status ID is unknown, the call status can be found by pressing the F3 key or by double-clicking the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.
     - To select a call status, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00) allowing users to modify information for an existing call status.
     - Clicking Insert on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00) and allows users to add new call statuses to the system.

16. Click OK.

17. To restrict a call view template to a specific geographic zone, click Geographic. Geography (SD.004.01) displays.

18. Type a geographic ID.
   - Multiple Geographic IDs can be selected for a call view template.
   - If the geographic zone ID is unknown, press F3 or double-click the right mouse button. A list of all geographic zones set up in Geographic Zone Maintenance (SD.009.00) displays.
     - To select a geographic zone, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Geographic Zone Maintenance PV List accesses Geographic Zone Maintenance (SD.009.00), enabling you to modify information for an existing geographic zone.
     - Clicking Insert on the Geographic Zone Maintenance PV List accesses Geographic Zone Maintenance (SD.009.00), enabling you to add new geographic zones to the system.

19. Click OK.
20. To change how service calls are sorted in Dispatch (SD.201.00), click **Sort Order**.

![Dispatch Sort Order (SD.004.02)](image)

**Figure 31: Dispatch Sort Order (SD.004.02)**

21. Choose the value that is used to create the dispatching sort from Available Fields and select **Add**.
   - The selected value shows in **Sort Fields**.
   - Multiple sorts can be used in a call view template.

22. Select the Sort Direction.
23. Click **OK**.
24. Click **Save** on the toolbar.
25. Click **Close** on the toolbar.
Set up Templates and Queues with User Configuration (SD.000.01)

(Optional) User Configuration (SD.000.01) is used to define default dispatching view templates or service call queues for each user. For example, if an organization has locations in Cleveland, Akron and Columbus, a dispatching template can be set up to only show open service calls for each city or dispatcher for that city. Therefore, a dispatcher in Cleveland cannot view open service calls for Columbus and accidentally assign a technician located in Cleveland to complete the work for a customer in Columbus.

**Note:** Completing User Configuration (SD.000.01) is an optional function in Service Dispatch. User Configuration (SD.000.01) cannot be set up until call view templates have been created in Dispatch - View Maintenance (SD.004.00).

1. Choose Module | Service Dispatch | Service Series Setup Maintenance from the menu. Service Series Setup Maintenance (SD.000.00) displays.
2. Click User Configuration. User Configuration (SD.000.01) displays.

![Figure 32: User Configuration (SD.000.01)](image)

3. Type a valid user in User ID.
   - If the user ID is unknown, press F3 or double-click the right mouse button. A list of all users set up in User Maintenance (95.260.00) displays.
     - To select a user, highlight the ID and click OK, or double-click the ID.
4. Type a call view template or Queue ID created in Dispatch - View Maintenance (SD.004.00) to default for the user in Dispatch (SD.201.00) in Service Call Config.
   - If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call queue views set up in Dispatch - View Maintenance (SD.004.00) displays.
     - To select a call queue view, highlight the ID and click OK, or double-click the ID.
   - Clicking **Edit** on the Call Queue View PV List accesses Dispatch - View Maintenance (SD.004.00), enabling you to modify information for an existing call view template.
   - Clicking **Insert** on the Call Queue View PV List accesses Dispatch - View Maintenance (SD.004.00), enabling you to add new call view templates to the system.
5. If the user needs to view open service calls for all branches, select the All check box.
6. If the user must be restricted to only view service calls for a single branch, do not select the All check box and type the branch ID in Branch ID.

- If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in Branch Maintenance (SD.001.00) displays.
  - To select a branch ID, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch.

- Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new branches to the system.

7. Click OK.

8. Click Save on the toolbar.

9. Click Close on the toolbar.
Define Problem Codes (SD.008.00)

Problem Code Maintenance (SD.008.00) is used to set up an unlimited number of problem codes that are used to define the reason service calls are generated. Problem codes can be attached to a service call in Service Call Entry (SD.200.00).

The following sections are required to complete Problem Code Maintenance (SD.008.00):

- **Problem Code** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define problem codes:

1. Choose **Module | Service Dispatch | Problem Code Maintenance** from the menu. Problem Code Maintenance (SD.008.00) displays.

   ![Figure 33: Problem Code Maintenance (SD.008.00)]

2. Type a unique 10-character ID for the problem code in **Problem Code**.

3. Type the 30-character explanation of the problem code in **Description**.

4. Type the estimated time needed to repair the problem code in **Estimate Time Duration**.

5. Select the **Prompt Operator** check box to have the system display the information in **Notes** when customer service representatives attach the problem code ID to a service call in Service Call Entry (SD.200.00).

6. Type the information or questions that displays when the problem code ID is attached to a service call in Service Call Entry (SD.200.00) in **Notes**.

7. If the Flat Rate Pricing module is installed, click **Tasks/Prices**. Possible Tasks/Prices (SD.008.01) displays.

   ![Figure 34: Possible Tasks/Prices (SD.008.01)]
8. Type the ID of all flat rate prices that apply to the problem code in Flat Rate ID.
   - Flat Rate ID description displays.
   - If the flat rate ID is unknown, press F3 or double-click the right mouse button. A list of all flat rate IDs set up in the Flat Rate Maintenance PV List displays.
     - To select a flat rate ID, highlight the ID and click OK, or double-click the ID.

9. Click Close on the toolbar.

10. Click Call Type. Problem Code - Call Type (SD.030.00) displays.

![Figure 35: Problem Code - Call Type (SD.030.00)](image)

11. Type the ID of all call types that apply to the problem code in Call Type ID.
   - Call Type ID description when a call type is selected.
   - If the call type ID is unknown, press F3 or double-click the right mouse button. A list of all call type IDs set up in Call Type Maintenance (SD.003.00) displays.
     - To select a call type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to modify information for an existing call type ID.
     - Clicking Insert on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to add new call type IDs to the system.

12. Click Save on the toolbar.

13. Click Close on the toolbar.

14. Click Tool Usage. Problem Code Tool Usage (SD.008.05) displays.

![Figure 36: Problem Code Tool Usage (SD.008.05)](image)
15. Type the ID of all tool usages that apply to the problem code in Usage ID.
   - **Usage ID** description displays.
   - If the usage ID is unknown, press F3 or double-click the right mouse button. A list of all tool usage IDs set up in Tool Usage Maintenance (SD.019.00) displays.
     - To select a usage ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Tool Usage Maintenance PV List accesses Tool Usage Maintenance (SD.019.00), enabling you to modify information for an existing usage ID.
     - Clicking **Insert** on the Tool Usage Maintenance PV List accesses Tool Usage Maintenance (SD.019.00), enabling you to add new usage IDs to the system.

16. Click **Close** on the toolbar.

17. Click **Skills**. Problem Code Skills Information (SD.008.02) displays.

18. Type the ID of all skills that apply to the problem code in Skill ID.
   - **Skill ID** description displays.
   - If the skill ID is unknown, press F3 or double-click the right mouse button. A list of all skill IDs set up in Skills Maintenance (SD.017.00) displays.
     - To select a skill ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Skills Maintenance PV List accesses Skills Maintenance (SD.017.00), enabling you to modify information for an existing skill ID.
     - Clicking **Insert** on the Skills Maintenance PV List accesses Skills Maintenance (SD.017.00), enabling you to add new skill IDs to the system.

19. Click **Close** on the toolbar.

20. Click **Licenses**. Problem Code Licenses Information (SD.008.03) displays.

21. Type the ID of all licenses that apply to the problem code in License ID.
   - **License ID** description displays.
   - If the license ID is unknown, press F3 or double-click the right mouse button. A list of all license IDs set up in License Maintenance (SD.010.00) displays.
     - To select a license ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Employee License Maintenance PV List accesses License Maintenance (SD.010.00), enabling you to modify information for an existing license ID.
     - Clicking **Insert** on the Employee License Maintenance PV List accesses License Maintenance (SD.010.00), enabling you to add new license IDs to the system.
22. Click **Close** on the toolbar.
23. Click **Save** on the toolbar.

**Note:** To view a list of problem codes, use “Problem Code List (SD.634.00)” on page 509.
Define Cause Codes (SD.014.00) (Optional)

*Cause Code Maintenance* (SD.014.00) is used to set up an unlimited number of cause codes used to define why a problem code may occur or why a piece of equipment is not working.

The following fields are required to complete *Cause Code Maintenance* (SD.014.00):

- **Cause ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define cause codes:

1. Choose **Module | Service Dispatch | Cause Code Maintenance** from the menu. *Cause Code Maintenance* (SD.014.00) displays.

2. Type a unique 10-character ID for the cause code in **Cause ID**.
3. Type the 30-character explanation of the cause code in **Description**.
4. Click **Save** on the toolbar.
5. Click **Close** on the toolbar.
Define Resolution Codes (SD.015.00) (Optional)

Resolution Code Maintenance (SD.015.00) is used to create an unlimited number of resolution codes used to define how a technician solves a problem or cause code.

The following fields are required to complete Resolution Code Maintenance (SD.015.00):

- **Resolution ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define resolution codes:


   ![Resolution Code Maintenance (SD015.00)](image)

   *Figure 40: Resolution Code Maintenance (SD015.00)*

2. Type a unique 10-character ID for the resolution code in **Resolution ID**.
3. Type the 30-character explanation of the resolution code in **Description**.
4. Click **Save** on the toolbar.
5. Click **Close** on the toolbar.
Define Media Groups (SD.013.00) (Optional)

*Media Group Maintenance* (SD.013.00) is used for reporting purposes to group similar marketing resources to track the most effective means of advertising. Media buy resources are attached to a media group in *Media Buy Maintenance* (SD.012.00) so the number of calls and total revenue generated by a media group can be viewed with the *Advertising Media Performance Report* (SD.630.00). For more information, see “Advertising Media Performance Report (SD.630.00)” on page 499.

The following fields are required to complete *Media Group Maintenance* (SD.013.00):

- **Media Group ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define media groups:

1. Choose *Module | Service Dispatch | Media Group Maintenance* from the menu.

   *Media Group Maintenance* (SD.013.00) displays.

2. Type a unique 10-character ID for the media group in **Media Group ID**.
3. Type the 30-character explanation of the media group in **Description**.
4. Click **Save** on the toolbar.
5. Click **Close** on the toolbar.

*Note:* To view a list of media group IDs, use “*Media Group List* (SD.609.00)” on page 508.
Define Media Sources (SD.012.00) (Optional)

Media Buy Maintenance (SD.012.00) is used to set up an unlimited number of marketing sources in order to track the most effective source of advertising. Media buy resources are attached to a service call in Service Call Entry (SD.200.00) so the number of calls and total revenue generated by a media code can be viewed with the Advertising Media Performance Report (SD.630.00). For more information, see “Advertising Media Performance Report (SD.630.00)” on page 499.

The following fields are required to complete Media Buy Maintenance (SD.012.00):

- Media Code (Step 2)
- Description (Step 3: recommended)
- Media Group (Step 4)

Use the following procedure to define media sources:

1. Choose Module | Service Dispatch | Media Buy Maintenance from the menu.

   Media Buy Maintenance (SD.012.00) displays.

2. Type a unique 10-character ID for the media source in Media Code.

3. Type the 30-character explanation of the media source in Description.

4. Type the media group associated with the media source in Media Group.
   - If the media group is unknown, press F3 or double-click the right mouse button. A list of all media groups set up in Media Group Maintenance (SD.013.00) displays.
     - To select a media group, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Media Group Maintenance PV List accesses Media Group Maintenance (SD.013.00), enabling you to modify information for an existing media group.
     - Clicking Insert on the Media Group Maintenance PV List accesses Media Group Maintenance (SD.013.00), enabling you to add new media groups to the system.

5. Depending on Frequency, type the total budget amount for the media source in Budget.
6. Establish the rate type that refers to the budget amount of the media source in Frequency.
7. Type the area or location that the marketing resource is covering in Location.
8. Type the date when the media source was purchased in Insertion/Buy Date.
9. Type the number of marketing resource pieces being used for the media source in Penetration/Pieces.
10. If cooperative advertising is used with the media source, select Coop Advertising.
11. If cooperative advertising is used with the media source, click Coop Information and type the needed cooperative advertising information.

12. Click Save on the toolbar.

13. Click Close on the toolbar.

**Note:** To view a list of media buys, use “Media Group List (SD.609.00)” on page 508.
Define Advertising Partners in Cooperative Advertising Information (SD.012.01) (Optional)

_Coop Advertising Information_ (SD.012.01) is used to set up cooperative advertising partners and the percentage share amounts that the cooperative partners contribute to the marketing resources. Cooperative advertising partner information is attached to media sources in _Media Buy Maintenance_ (SD.012.00).

**Note:** Data entered in Step 23 is used for informational purposes only.

1. Choose _Module | Service Dispatch | Media Buy Maintenance_ from the menu.

   _Media Buy Maintenance_ (SD.012.00) displays.

2. Select the _Media Code_ associated with the cooperative advertising partners.

3. Click _Coop Information_.

   _Coop Advertising Information_ (SD.012.01) displays.

4. Type a valid vendor from accounts payable for the cooperative advertising partner for the media source in _Coop/Vendor ID_.
   
   - The name of the cooperative advertising partner displays.
   - If the coop/vendor ID is unknown, press F3 or double-click the right mouse button. A list of all coop/vendor IDs set up in _Vendor Maintenance_ (03.270.00) displays.
     - To select a coop/vendor ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the _Vendor List_ _Vendor Maintenance_ (03.270.00), enabling you to modify information for an existing coop/vendor ID.
     - Clicking **Insert** on the _Vendor List_ _Vendor Maintenance_ (03.270.00), enabling you to add new coop/vendor IDs to the system.

5. Type the address associated with the cooperative advertising partner in _Address Line 1_.

6. Type the address associated with the cooperative advertising partner in _Address Line 2_.

7. Type the city where the cooperative advertising partner is located in _City_.

8. Type the state where the cooperative advertising partner is located in _State_.
   
   - If the state is unknown, press F3 or double-click the right mouse button. A list of all states set up in _State/Province Maintenance_ (21.290.00) displays.
     - To select a state or province, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the _State List_ accesses _State/Province Maintenance_ (21.290.00), enabling you to modify information for an existing state or province.
     - Clicking **Insert** on the _State List_ accesses _State/Province Maintenance_ (21.290.00), enabling you to add new states/provinces to the system.

9. Type the postal code where the cooperative advertising partner is located in _Zip Code_.

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*Figure 43: Coop Advertising Information (SD.012.01)*
10. Type the name of the contact associated with the cooperative advertising partner in **Contact**.
11. Type the phone number associated with the cooperative advertising partner in **Phone Number**.
12. Type the fax number associated with the cooperative advertising partner in **Fax Number**.
13. Type the percentage share the cooperative partner contributes to the marketing resources in **Share Percentage**.
14. If the cooperative advertising partner has paid their portion of the media resource, select the **Coop Portion Paid** check box.
15. Click **Save** on the toolbar.
16. Click **Close** on the toolbar.
Define Product Classes (SD.016.00) (Optional)

*Product Class Maintenance* (SD.016.00) allows users to add Field Service Management-related information to the product classes created in the Inventory module.

Product classes are defined in the Inventory module. A list of product classes can be found on Inventory’s *Product Classes* (10.700.00) report. Field Service Management extends product class data. Extended product class data can be viewed on “Product Class List (SD.611.00)” on page 509.

The following fields are required to complete *Product Class Maintenance* (SD.016.00):

- **Class ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define product classes:


2. Type a unique 10-character identifier for the class in **Class ID**.

3. Type a 30-character explanation of the product class in **Description**.

4. Select the type of commission to be paid for the class ID in **Comm Status**.
   - Materials
   - Labor
   - None
   - **Comm Status** is for informational purposes only.

5. Select the type of mark-up pricing in **Pricing Type** to be used with the class ID when entering detail lines in *Invoice - T & M Details* (SD.203.00):
   - Labor
   - Materials
   - None

6. Select the **Sales Analysis Category** for the class ID to be used when printing the *Sales Analysis Report* (SD.626.00). For more information, see “Sales Analysis Report (SD.626.00)” on page 512.
   - Materials
   - Labor
   - Rental
   - Subcontract
   - Misc
7. If the Flat Rate module is installed, type the Flat Rate Markup ID that calculates the unit price when entering detail records in Flat Rate Entry (SP.000.00).
   - If the ID is unknown, press F3 or double-click the right mouse button. A list of all flat rate mark-up IDs set up in Inventory Mark-up Maintenance (SD.026.00) displays.
     - To select a flat rate mark-up ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Mark Up Maintenance PV List accesses Inventory Mark-up Maintenance (SD.026.00), enabling you to modify information for an existing flat rate mark-up ID.
     - Clicking Insert on the Mark Up Maintenance PV List accesses Inventory Mark-up Maintenance (SD.026.00), enabling you to add new flat rate mark-up IDs to the system.

8. Click Save on the toolbar.

9. Click Close on the toolbar.
Define Dwelling Types (SD.005.00) (Optional)

Dwelling Maintenance (SD.005.00) is used to create an unlimited number of dwelling types in the system for reporting purposes. Dwellings are used to represent the different type of buildings where organizations perform work. For example, a customer report can be generated that shows residential versus commercial buildings.

The following fields are required to complete Dwelling Maintenance (SD.005.00):

- **Dwelling ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define dwelling types:

1. Choose **Module | Service Dispatch | Dwelling Maintenance** from the menu.  
   
   **Dwelling Maintenance** (SD.005.00) displays.

2. Type a unique 10-character ID for the dwelling type in **Dwelling ID**.
3. Type a 30-character explanation of the dwelling type in **Description**.
4. Click **Save** on the toolbar.
5. Click **Close** on the toolbar.

**Note:** To view a list of dwelling types, use “Dwelling List (SD.603.00)” on page 503.
Define Inventory Mark-Ups (SD.026.00) (Optional)

Inventory Mark-Up Maintenance (SD.026.00) is used to set up an unlimited number of inventory mark-up tables that increase the price of inventory items that are associated with a flat rate price. When running Price Update Process (SP.203.00) in the Flat Rate Pricing module, the system increases the price of individual inventory items of a flat rate price by a cost multiplier based on the cost of the item.

Inventory mark-ups are attached to a customer site in Site Maintenance (SD.025.00). To view a list of inventory mark-up IDs, use “Inventory Mark-Up (SD.619.00)” on page 506.

The following fields are required to complete Inventory Mark-Up Maintenance (SD.026.00):

- **Mark-Up ID** (Step 2)
- **Description** (Step 3: recommended)

Use the following procedure to define inventory mark-ups:

1. Choose Module | Service Dispatch | Inventory Mark-Up Maintenance from the menu. **Inventory Mark-Up Maintenance (SD.026.00) displays.**

2. Type a unique 10-character ID for the inventory mark-up in Mark-Up ID.
3. Type the 30-character explanation of the inventory mark-up in Description.
4. Type the cost ranges associated with the inventory mark-up in From and To.
5. Type the cost multiplier for the cost ranges in Cost Multiplier.
6. Click **Save** on the toolbar.
7. Click **Close** on the toolbar.
Define New Customer Sites (SD.025.00)

Site Maintenance (SD.025.00) is designed to enable you to set up an unlimited number of locations for customers. Service call defaults are entered into this screen so that customer service representatives can quickly enter a service call once a customer and site are selected. To view a list of new customer sites, use “Site List (SD.612.00)” on page 531.

The following fields are required to complete Site Maintenance (SD.025.00):

- **Site ID** (Step 3)
- **Description** (Step 4: recommended)
- **Geographic Zone** (Step 26)
- **Tax ID** (Step 28)

Use the following procedure to define new customer sites:

1. Choose **Module | Service Dispatch | Site Maintenance** from the menu.

   If the screen is in Form View, the **Customer Info** tab of Site Maintenance (SD.025.00) displays.

![Site Maintenance (SD.025.00), Customer Info tab](image-url)

*Figure 47: Site Maintenance (SD.025.00), Customer Info tab*
2. Type the ID of the customer associated with the new site in Customer ID.
   • If the customer ID is unknown, press F3 or double-click the right mouse button. A list of all active customers set up in Customer Maintenance (08.260.00) of Accounts Receivable displays.
     – To select a customer ID, highlight the ID and click OK, or double-click the ID.
     – Clicking Edit on the Active Customer List accesses Customer Maintenance (08.260.00), enabling you to modify information for an existing customer.
     – Clicking Insert on the Active Customer List accesses Customer Maintenance (08.260.00), enabling you to add new customer to Accounts Receivable.

3. Type a unique 10-character ID for the customer site in Site ID.
   Note: Service Call Entry (SD.200.00) automatically populates Site ID with the default customer site ID. If a default site ID does not exist, you must manually select site ID.

4. Type a 30-character explanation of the customer site in Description.

5. If a new customer letter is printed for all new customer sites, select the Print Letter check box.

6. Type the contact person associated with the customer site in Attention.

7. Type the address of the customer site in Address Line 1 and Address Line 2.

8. Type the city in which the customer site is located in City.

9. Type the two-letter state abbreviation in which the customer site is located in State.
   • If the state is unknown, press F3 or double-click the right mouse button. A list of all states set up in State/Province Maintenance (21.290.00) displays.
     – To select a state or province, highlight the ID and click OK, or double-click the ID.
     – Clicking Edit on the State List accesses State/Province Maintenance (21.290.00), enabling you to modify information for an existing state or province.
     – Clicking Insert on the State List accesses State/Province Maintenance (21.290.00), enabling you to add new states/provinces to the system.

10. Type the zip code in which the customer site is located in Postal Code.
    • If the zip code is unknown, press F3 or double-click the right mouse button. A list of all zip codes set up in Zip Code Maintenance (SD.021.00) displays.
      – To select a zip code, highlight the ID and click OK, or double-click the ID.
      – Clicking Edit on the Zip Code Maintenance PV List accesses Zip Code Maintenance (SD.021.00), enabling you to modify information for an existing zip code.
      – Clicking Insert on the Zip Code Maintenance PV List accesses Zip Code Maintenance (SD.021.00), enabling you to add new zip codes to the system.

11. Type the two or three-character country or region abbreviation in which the customer site is located in Country/Region.
    • If the country or region is unknown, press F3 or double-click the right mouse button. A list of all countries or regions set up in Country/Region Maintenance (21.300.00) displays.
      – To select a country or region, highlight the ID and click OK, or double-click the ID.
      – Clicking Edit on the Country/Region List accesses Country/Region Maintenance (21.300.00), enabling you to modify information for an existing country or region.
      – Clicking Insert on the Country/Region List accesses Country/Region Maintenance (21.300.00), enabling you to add new countries or regions to the system.

12. Type the phone number of the customer site in Phone/Ext.

13. Type the fax number of the customer site is Fax/Ext.
14. If your company needs to generate Profit and Loss statements for each customer site, type the subaccount associated with the customer site in **Sub Account**.
   - Use **Sub from Site** in **Call Type Maintenance** (SD.003.00) must also be selected in order to associate the customer site subaccount to the sales and costs of a service call.
   - If the subaccount number is unknown, press F3 or double-click the right mouse button. A list of all subaccounts set up in **Subaccount Maintenance** (01.270.00) displays.
     - To select a subaccount, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to modify information for an existing subaccount.
     - Clicking **Insert** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to add new subaccounts to the system.

15. Type the tax information for the site in **Tax ID 1**, **Tax ID 2**, **Tax ID 3**, and **Tax ID 4**.
   - Although this tax data is not used by the invoicing functions in Field Service Management, the information is used in **Invoice and Memo** (08.010.00) of Accounts Receivable.
   - If the tax ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in **Tax Maintenance** (21.280.00) displays.
     - To select a tax ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking **Insert** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to add new sales taxes to the system.

16. Click **Special Pricing** to create special prices for specific inventory items for the customer site.
    **Site - Special Pricing Maintenance** (SD.037.00) displays.
    - **Special Pricing** is optional and is not required to complete **Site Maintenance** (SD.025.00).

17. If the screen is in Form View, click the **Serv Call Info** tab.
The **Serv Call Info** tab of *Site Maintenance (SD.025.00)* displays.

![Site Maintenance (SD.025.00), Serv Call Info tab](image)

**Figure 48: Site Maintenance (SD.025.00), Serv Call Info tab**

18. Type the date the customer site is entered into the system in **Created Date**.
   
   Although the date defaults to the current system date, a new date can be entered.

19. Type a map page that corresponds to the site address of the customer in **Map Page**.

20. Type the map coordinates that is associated with the map page and site address of the customer in **Coordinates**.

21. Type the maximum amount a service call can be without needing authorization in **Max Service Amount**.
   - **Max Service Amount** is for informational purposes only.
   - **Max Service Amount** is only valid when **Yes** is selected in **Tenant Auth To Call**.

22. Establish if the system should warn customer service representatives during **Service Call Entry** (SD.200.00) the caller has the authority to place a new service request in **Tenant Auth To Call**.
   
   - **Yes**
   - **No**

   **Note:** Selecting **Yes** turns **Authorization Req** blue beside **Attention** in **Service Call Entry** (SD.200.00).

23. Type the source used by the customer site to learn about your company in **Media ID**.
24. If the media ID is unknown, press F3 or double-click the right mouse button. A list of all media sources set up in Media Buy Maintenance (SD.012.00) displays.
   - To select a media ID, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Media Buy Maintenance PV List accesses Media Buy Maintenance (SD.012.00), enabling you to modify information for an existing media source.
   - Clicking Insert on the Media Buy Maintenance PV List accesses Media Buy Maintenance (SD.012.00), enabling you to add new media sources to Service Dispatch.

25. Type the pricing mark-up table that calculates the unit price from the unit cost of material inventory items when entering detail records in Invoice - T & M Details (SD.203.00) in Material Markup ID.

26. If the mark-up ID is unknown, press F3 or double-click the right mouse button. A list of all mark-up IDs set up in Inventory Mark-up Maintenance (SD.026.00) displays.
   - To select a mark-up ID, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Mark-up Maintenance PV List accesses Inventory Mark-up Maintenance (SD.026.00), enabling you to modify information for an existing mark-up table.
   - Clicking Insert on the Mark-up Maintenance PV List accesses Inventory Mark-up Maintenance (SD.026.00), enabling you to add new mark-up tables to Service Dispatch.

27. Type the pricing mark-up table that calculates the unit price from the unit cost of labor inventory items when entering detail records in Invoice - T & M Details (SD.203.00) in Labor Markup ID.

28. If the mark-up ID is unknown, press F3 or double-click the right mouse button. A list of all mark-up IDs set up in Inventory Mark-up Maintenance (SD.026.00) displays.
   - To select a mark-up ID, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Mark-up Maintenance PV List accesses Inventory Mark-up Maintenance (SD.026.00), enabling you to modify information for an existing mark-up table.
   - Clicking Insert on the Mark-up Buy Maintenance PV List accesses Inventory Mark-up Maintenance (SD.026.00), enabling you to add new mark-up tables to Service Dispatch.

29. Type the geographic ID associated with the customer site in Geographic Zone.
   - The Geographic Zone populates automatically if the zip code of the customer site has been associated with a geographic zone in Geographic Zone Maintenance (SD.009.00) or Zip Code Maintenance (SD.021.00).
   - If the geographic zone ID is unknown, press F3 or double-click the right mouse button. A list of all geographic zones set up in Geographic Zone Maintenance (SD.009.00) displays.
     - To select a geographic zone, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Geographic Zone Maintenance PV List accesses Geographic Zone Maintenance (SD.009.00), enabling you to modify information for an existing geographic zone.
     - Clicking Insert on the Geographic Zone Maintenance PV List accesses Geographic Zone Maintenance (SD.009.00), enabling you to add new geographic zones to the system.
30. Type the branch ID that is responsible for servicing the customer site in Branch ID.

- The Branch ID populates automatically if the zip code of the customer site has been associated with a geographic zone in Geographic Zone Maintenance (SD.009.00) or Zip Code Maintenance (SD.021.00) and the geographic zone has been associated with a branch in Branch Maintenance (SD.001.00) or Geographic Zone Maintenance (SD.009.00).

- If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in Branch Maintenance (SD.001.00) displays.
  - To select a branch ID, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch.
  - Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new branches to the system.

31. Type the sales tax that will be used by the invoicing functions in Field Service Management for the customer site in Tax ID.

- If the tax ID is unknown, press F3 or double-click the right mouse button. A list of all sales taxes set up in Tax Maintenance (21.280.00) displays.
  - To select a tax ID, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for an existing sales tax.
  - Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.

32. Type the building type for the customer site in Dwelling Type.

33. If the dwelling ID is unknown, press F3 or double-click the right mouse button. A list of all dwelling types set up in Dwelling Maintenance (SD.005.00) displays.

- To select a dwelling ID, highlight the ID and click OK, or double-click the ID.
- Clicking Edit on the Dwelling Maintenance PV List accesses Dwelling Maintenance (SD.005.00), enabling you to modify information for an existing dwelling type.
- Clicking Insert on the Dwelling Maintenance PV List accesses Dwelling Maintenance (SD.005.00), enabling you to add new dwelling types to the system.

34. Choose if a purchase order is necessary to process and save a service call in Service Call Entry (SD.200.00).

- Required
- Not Allowed
- Optional

35. Type a security entry code for the customer site if the site has an alarm system in Sec. Entry Code.

36. Type a purchase order number that defaults to the service call in Service Call Entry (SD.200.00) in Blanket PO Number.

37. Type a call type that is most frequently used by the customer site to default to Service Call Entry (SD.200.00) in Call Type.

38. If the call type ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.

- To select a call type, highlight the ID and click OK, or double-click the ID.
- Clicking Edit on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to modify information for an existing call status.
- Clicking Insert on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to add new call statuses to the system.

39. Type a call status to default to Service Call Entry (SD.200.00) for the customer site in Status ID.
- If the call status ID is unknown, press F3 key or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.
  - To select a call status, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to modify information for an existing call status.
  - Clicking Insert on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to add new call statuses to the system.

40. Type the Project or Service Manager for the customer site in Proj. Manager.
- If the employee ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
  - To select an employee ID, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing employee.
  - Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new employees to the system.

41. Type the salesperson that is responsible for the customer site that defaults to Service Call Entry (SD.200.00) in Salesperson.
- If the salesperson ID is unknown, press F3 or double-click the right mouse button. A list of all salespersons set up in Salesperson Maintenance (08.310.00) displays.
  - To select a salesperson, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Salesperson List accesses Salesperson Maintenance (08.310.00), enabling you to modify information for an existing salesperson.
  - Clicking Insert on the Salesperson List accesses Salesperson Maintenance (08.310.00), enabling you to add new salespersons to the system.

42. Type the ID of the technician responsible for performing most of the work for the customer site to default to Service Call Entry (SD.200.00) in Technician.
- If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
  - To select a technician, highlight the ID and click OK, or double-click ID.
  - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing employee.
  - Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new employees to the system.

43. If the Flat Rate Pricing module is installed, type a flat rate plan that will be associated with the customer site in Prc Plan ID.
- If the flat rate plan ID is unknown, press F3 or double-click the right mouse button. A list of all flat rates set up in Flat Rate Pricing Plan Maintenance (SP.002.00) displays.
  - To select a flat rate, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Plan Maintenance PV List accesses Flat Rate Pricing Plan Maintenance (SP.002.00), enabling you to modify information for an existing flat rate plan.
  - Clicking Insert on the Plan Maintenance PV List accesses Flat Rate Pricing Plan Maintenance (SP.002.00), enabling you to add new flat rate plans to the system.

44. Select the payment method for the customer site in Pyt Method.
- Cash
- Check
- Discover
• Visa
• Master Card
• American Express
• In House Charge

Pyt Method is for reporting purposes only.

45. Select the default call priority that defaults to Service Call Entry (SD.200.00) for the customer site in Priority.
• Premium
• High
• Medium
• Low
• None

46. Click Save then Close on the toolbar.
Define Customer Site Groups (SD.041.00)

Customer Site Group (SD.041.00) lets you set up groups into which you can organize customer sites. This lets you apply special pricing in a more robust manner, updating current prices and revised prices by group ID instead of by site ID.

To define new customer site groups, follow these steps:

1. Select Field Service | Service Dispatch | Customer Site Group Maintenance.

2. In Customer Site Group ID, type the identifier that you want to assign to the customer site group.

3. (Optional) In Description, specify a description of the customer site group.

4. In the Customer Site Group Members area, specify the following:
   a) Customer ID – type, or press F3 to select, a customer ID.
   b) Customer Site ID – type, or press F3 to select, a customer site ID.

   Note: Only those customer IDs and customer site IDs that you previously set up in Site Maintenance (SD.025.00) are available.

5. Repeat step 4 for each customer ID/customer site ID combination that you want to add to the group.

   Note: You can add each customer ID/customer site ID combination to as many groups as you want. No limit exists.

6. Click Save, and then close the screen.
Define Special Pricing (SD.037.00) (Optional)

Site - Special Pricing Maintenance (SD.037.00) lets you create specific inventory item special pricing for customer sites, including revisions for future special prices.

The following field is required to complete Site - Special Pricing Maintenance (SD.037.00):

- Inventory ID (Step 5)

Use the following procedure to define special pricing parameters:

1. Select Field Service | Service Dispatch | Site Maintenance.
   Site Maintenance (SD.025.00) displays.

2. Type the identifier of the customer in which inventory item special pricing will be associated with in Customer ID.
   - If the customer ID is unknown, press F3 or double-click the right mouse button. A list of all active customers set up in Customer Maintenance (08.260.00) of Accounts Receivable displays.
     - To select a customer ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Active Customer List accesses Customer Maintenance (08.260.00), enabling you to modify information for an existing customer.
     - Clicking Insert on the Active Customer List accesses Customer Maintenance (08.260.00), enabling you to add new customer to Accounts Receivable.

3. Choose the customer site where special inventory item pricing will be associated with in Site ID.

4. Click Special Pricing. Site - Special Pricing Maintenance (SD.037.00) displays.

5. Type the ID for the item that a special price is associated with in Inventory ID, and then click Refresh.

6. In the grid, specify the following settings for each special price that you want to create.
   a) In Inventory ID, type the ID for the item to which you want to associate a special price.
b) If the inventory item ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) of Inventory displays.
   - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
   - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to Inventory.

c) In Start Date, specify the date on which you want the special price to become effective. A blank start date indicates that the price has always been in effect.

d) Specify the date on which you want the special price to expire in End Date. A blank end date indicates that the price will never expire.

e) Select the pricing modification method associated with the inventory item in Price Option.
   - Amount
   - Discount %
   - In Price/Disc %, type the amount that overrides the Stock Base Price of the inventory item when invoicing by using Invoice – T & M Details (SD.203.00) if you selected Amount in Price Option.
   - If you selected Discount % in Price Option, type the percentage that reduces the Stock Base Price of the inventory item when invoicing by using Invoice – T & M Details (SD.203.00) in Price/Disc.

f) In Revised Start Date, specify the future date on which you want the revised special price to become effective. A blank start date indicates that you do not want to specify a start date.

 g) Specify the future date on which you want the special price to expire in End Date. A blank end date indicates that you do not want to specify an end date.

h) In Revised Price/Disc %, type the revised amount that overrides the Stock Base Price of the inventory item when invoicing by using Invoice – T & M Details (SD.203.00) if you selected Amount in Price Option.
   - If you selected Discount % in Price Option, type the revised percentage that reduces the Stock Base Price of the inventory item when invoicing by using Invoice – T & M Details (SD.203.00) in Price/Disc.

i) (Optional) In Price Description, add a description of the special price. For example, “Summer Sale” or “Midwest May Discount.”

7. Click OK.
Create Note Templates (SD.410.00) (Optional)

*Notes Template* (SD.410.00) allows users to set up an unlimited number of note templates to be attached to the service call for invoicing. These templates can also be attached to equipment in the Service Contracts module.

The following fields are required to complete *Notes Template* (SD.410.00):

- **Template ID** (Step 2)
- **Description** (Step 3: recommended)

**Use the following procedure to create notes templates:**

1. Choose **Module | Service Dispatch | Notes Template** from the menu. *Notes Template* (SD.410.00) displays.

2. Type a unique 10-character ID for the note in **Template ID**.
3. Type the 30-character explanation of the note in **Description**.
4. Type the note in the free-form text box below **Description**.
5. Click **Save** on the toolbar.
6. Click **Close** on the toolbar.
Service Call Entry

Creating and Processing Service Calls

Service Call Entry (SD.200.00) enables users to perform the functions related to creating and processing a service call on one central screen. Once the customer and site have been selected, values attached to the customer site default to the service call. Buttons and fields on Service Call Entry (SD.200.00) are active or inactive based on information entered.

Note: You can run a report to review billable and non-billable details associated with service calls. For more information, see “Service Call Audit (SD.627.00)” on page 513. You can run a report to review open service calls. For more information, see “Open Service Call List (SD.620.00)” on page 509.

Figure 51: Service Call Entry (SD.200.00)

Service Call Entry (SD.200.00) is divided into tabs and has several buttons. Each tab contains information related to a particular aspect of a service call such as, “What are the problem codes or reasons for the service call?”
The table displays an overview of the individual tabs in *Service Call Entry* (SD.200.00).

<table>
<thead>
<tr>
<th>The tab...</th>
<th>Enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Call Info</td>
<td>Add or update Problem, Cause, and Resolution Codes for a service call, and print service call work orders.</td>
</tr>
<tr>
<td>New Customer</td>
<td>Quickly add new customer and site information without opening Customer Maintenance (08.260.00) in Accounts Receivable.</td>
</tr>
<tr>
<td>Other Info</td>
<td>Add or view miscellaneous information related to the service call including aging information for the customer.</td>
</tr>
<tr>
<td>Tech Available</td>
<td>View technicians’ assignments on the Graphical Dispatch Board to determine the next available technician.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The button...</th>
<th>Enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>Access <em>Customer Equipment</em> (SD.200.03) and view pieces of equipment associated with the customer site whether covered by a service contract or not.</td>
</tr>
<tr>
<td>PM Tasks</td>
<td>Access <em>Service Contract - Equipment PM Tasks</em> (SE.017.00) and view the preventive maintenance line item detail associated to the PM Codes of the service call.</td>
</tr>
<tr>
<td>Open Calls</td>
<td>Access <em>Open Service Call</em> (SD.200.02) and review all open calls associated with the company and customer site.</td>
</tr>
<tr>
<td>Service History</td>
<td>Access <em>Service Call History</em> (SD.301.00) and review all completed service calls associated with the customer site.</td>
</tr>
<tr>
<td>Invoice</td>
<td>Access <em>Invoice Entry</em> (SD.202.00) and enter invoicing information and detail for the service call.</td>
</tr>
<tr>
<td>Print</td>
<td>Print a work order for the service call.</td>
</tr>
</tbody>
</table>
Entering a Service Call

Entering Header Information

To enter header information:

1. Open Service Call Entry (SD.200.00) by choosing Module | Service Dispatch | Service Call Entry from the menu. Service Call Entry (SD.200.00) displays.

2. (Optional) The identification code assigned to the company you are currently working in appears in Company ID. To enter a service call for another company, type that company’s ID.

3. Select how the system will process the service call in Handling.
   - No Action
   - Release Now
   - Release Later
   - Hold
   - Quote
   - Completed
Note: Release Now is the only option that releases the service call to Dispatch (SD.201.00).

4. Type the ID of the new service call in Service Call ID.
   If Auto Number Service Call in Service Series Setup Maintenance (SD.000.00) is enabled, Service Call ID is automatically assigned when Save or Finish is selected.

5. Type the customer identifier associated with the service call in Cust ID.
   - After typing the customer ID, click the ellipsis (...) button to the left of Cust ID to open Customer Maintenance (08.260.00) in the Accounts Receivable module.
   - If the customer ID is unknown:
     a) Press F3 or double-click the right mouse button.
        A list of all active customers displays by Customer ID in ascending order. If a large number of active customers exist in the system, the list may take some time to display.
     b) To select a customer ID, highlight the ID and click OK, or double-click the ID.

   Note:
   - When selecting a customer in Service Call Entry (SD.200.00), the Dflt Ship To ID on the Order Management tab associated with the customer in Customer Maintenance (08.260.00) of Accounts Receivable populates Site ID in Service Call Entry (SD.200.00).
   - If no Dflt Ship To ID is associated with the customer, Site ID in Service Call Entry (SD.200.00) must be selected manually.

-OR-

   a) Click Customer Lookup. Customer Lookup (SD.305.00) appears.
   b) Click the down arrow to the right of Search By. A list of possible filters for your search appears.
      The search engine can locate a customer based on Site Name, Attention, Description, Address 1, Address 2, City, Postal Code, Phone, Equipment ID, Asset ID, Serial Number, Model ID, Address User1, Address User2, Address User5, and Address User6.
   c) Select one of the values in Search By.

   Note:
   - We recommend that you base searches on Address 1, because typically that address is unique to a customer site. You can also use Phone Number for quick searches.
   - The Customization Manager module can be used to add Address User1, Address User2, Address User5, and Address User6 of the SOADDRESS table to Site Maintenance (SD.025.00). The search engine allows users to locate a customer and site by the information entered in these user fields.
   d) Refine your search in Using by selecting Begins with or Contains from the list that appears when you click the down arrow.
   e) In Search Info, type information to narrow the search further. You can enter partial data.
      Example: For example, your customer is located at 3700 Oak Street. You select Address 1 from the Search By list, Begins with from the Using list, and then enter 3700 in Search Info.
   f) Click Search.

6. Select the Filter Equip ID check box next to Cust ID if you would like to restrict the results of the possible values list for Equip ID to include only information for this specific customer. This check box can be used in conjunction with the Filter Equip ID check box for Site ID.
7. Type the customer’s site identifier associated with the service call in **Site ID**. If the site must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all sites for the customer displays.
   - To select a site ID, highlight the ID and click **OK**, or double-click the ID.

   **Note:** Click the ellipsis (...) button to the left of **Site ID** to open **Site Maintenance** (SD.025.00).
   - Once **Site Maintenance** (SD.025.00) has been accessed, existing sites associated with the customer can be viewed and edited while new sites can be added.
   - Once a **Site ID** has been selected, the **Site Attention**, **Site Address 1**, **Site Address 2**, **Site City**, **Site State**, **Site Zip**, and **Site Telephone Number** associated with the customer site are populated. When a **Site ID** is associated with a service call, the following fields default from the customer site: **Branch ID**, **Call Type**, **Call Status**, **Primary Tech**, and **Priority**.

   **Note:** When selecting a customer in **Service Call Entry** (SD.200.00), the **Dflt Ship To ID** on the **Order Management** tab associated with the customer in **Customer Maintenance** (08.260.00) of Accounts Receivable populates **Site ID** in **Service Call Entry** (SD.200.00).

   **Note:** If no **Dflt Ship To ID** is associated with the customer, **Site ID** in **Service Call Entry** (SD.200.00) must be selected manually.

8. Select the **Filter Equip ID** check box next to **Site ID** if you would like to restrict the results of the possible values list for **Equip ID** to include only information for this specific site. This check box can be used in conjunction with the **Filter Equip ID** check box for **Cust ID**.

9. Type the identifier of the branch responsible for completing the work on the service call in **Branch ID**.
   - After a site has been entered, the default **Branch ID** for the customer site displays.
   - If the branch must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all branches in the system displays.
     - To select a branch ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Branch Maintenance PV List** accesses **Branch Maintenance** (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking **Insert** on the **Branch Maintenance PV List** accesses **Branch Maintenance** (SD.001.00), enabling you to add new branches to the system.

10. Type the project identifier of the project associated with the service call in **Project ID**.
    - If the project ID is unknown, press **F3** or double-click the right mouse button. A list of all active projects for the customer displays in **Project Maintenance** (PA.PRJ.00) in the Project Controller module.
      - To select a project ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Active Projects in Login Company List** accesses **Project Maintenance** (PJ.PRJ.00), enabling you to modify information for an existing project.
      - Clicking **Insert** on the **Active Projects in Login Company List** accesses **Project Maintenance** (PJ.PRJ.00), enabling you to add new projects to the system.
11. Type the contract identifier of the contract entered in Service Contract Entry (SN.001.00) in the Service Contracts module associated with the service call in **Contract ID**.
   - If the contract ID is unknown, press F3 or double-click the right mouse button. A list of all service contracts in Service Contract Entry (SN.001.00) displays.
   - Clicking the ellipsis (…) button to the left of **Contract ID** displays a list of active service contracts for the customer site.
   - When a service contract is associated with a service call, the following fields default from the service contract: **Call Type**, **Primary Tech**, and **Priority**.
   - Attaching a service contract to a service call allows special pricing associated with the service contract during invoicing.
   - If **Active Contract Notification** is selected in Service Series Setup Maintenance (SD.000.000) and the customer site has active service contracts, a warning message displays.

12. Type the call type identifier of the call type, line of business, or division associated with the service call in **Call Type**.
   - If the call type must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call types in Call Type Maintenance (SD.003.00) displays.
     - To select a call type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to modify information for an existing call type.
     - Clicking **Insert** on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to add new call types to the system.
   - The call type associated with the customer site defaults.
   - If a service contract is attached to the service call, the call type associated with the service contract overrides the default.
   - **Note:** **Call Type** determines the subaccount used during the invoice entry process. The subaccount defaults from the call type unless **Use Sub from Site** is selected in Call Type Maintenance (SD.003.00).

13. Type the call status identifier of the call status associated with the service call in **Call Status**.
   - If the call status must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses in Call Status Maintenance (SD.002.00) displays.
     - To select a call status ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to modify information for an existing call status.
     - Clicking **Insert** on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.002.00), enabling you to add new call statuses to the system.
   - The call status associated with the customer site defaults.

14. Type the requested start date for the service call in **Promised Date**.
   - **Promised Date** defaults to the current system date unless the call is outside normal business hours set up in Service Series Setup Maintenance (SD.000.00).
   - If the service call is entered outside of normal business hours, the date defaults to the next business date.
   - **Promised Date** may be overridden during entry of the service call.
15. Type the range of times that a service call is to be performed in **Time From** and **Time To**.

- **Time From** is calculated using the time of the system plus the **Service Call Lead Time** entered in *Service Series Setup Maintenance* (SD.000.00).
- **Time To** is calculated by **Time From** plus the **Service Call Range Time** entered in *Service Series Setup Maintenance* (SD.000.00).
- The default values for **Time From** and **Time To** can be overridden during entry.

16. Type the ID of the technician responsible for completing the work on the service call in **Primary Tech**.

- **Primary Tech** is used to display service calls in *Dispatch* (SD.201.00).
- If the technician must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians in *Employee Maintenance* (SD.007.00) displays.
  - To select a technician ID, highlight the ID and click OK, or double-click the ID.
  - Clicking **Edit** on the **Employee Maintenance PV List** accesses *Employee Maintenance* (SD.007.00), enabling you to modify information for an existing technician.
  - Clicking **Insert** on the **Employee Maintenance PV List** accesses *Employee Maintenance* (SD.007.00), enabling you to add new technicians to the system.
- After the site has been entered, the default technician for the customer site displays.
- If a service contract is attached to the service call, the primary technician associated with the service contract defaults.

*Note*: *Dispatch* (SD.201.00) uses the primary technician entered here as the default technician.

17. Type the priority associated with the service call in **Priority**.

- Clicking the down arrow to the right of **Priority** displays a predefined list set up: Premium, High, Medium, and Low.
- After the site has been entered, the default priority for the customer site displays.
- If a service contract is attached to the service call, the priority associated with the service contract defaults.
- During the dispatching process, users can restrict service calls that display on dispatching screens by priority of the service calls. For example, a dispatcher can view only open service calls with a premium priority.
Entering Line Items, Service Call Info Tab

To enter line items:

1. Type the code that describes the reason for the service call in **Problem Code**.
   - If the problem code ID is unknown, press F3 or double-click the right mouse button. A list of all problem codes in **Problem Code Maintenance** (SD.008.00) associated with **Call Type** in **Service Call Entry** (SD.200.00) displays.
     - To select a problem code ID, highlight the ID and click **OK**, or double-click the ID.
   - After a problem code has been selected, the problem code description defaults to **Description/Problem Name**.
   - Multiple problem codes can be attached to the service call.
   - Using problem codes is optional when creating a service call.
   - If **Prompt Operator** is selected for the problem code in **Problem Code Maintenance** (SD.008.00), a window showing the text entered in **Notes** for the problem code appears.

**Note:** This feature allows customer service representatives to give the best service by asking the appropriate questions to get information needed to complete a service call without having to spend large amounts of time and money for training.
2. Type the ID of the technician responsible for performing the work to complete the problem code in Technician ID.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians in Employee Maintenance (SD.007.00) displays.
     - Select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new technicians to the system.

Note: Normally, customer service representatives will not know the technicians responsible for completing the work on a service call. The technicians are assigned to the service call during the dispatching process.

3. Type the estimated amount of time for performing the work to complete the problem code in Duration.
   - The value defaults from Estimated Time Duration entered in Problem Code Maintenance (SD.008.00) for the problem code entered in Problem Code ID.

4. Type the ID of the service contract entered in Service Contract Entry (SN.001.00) associated with the Problem Code of the service call in Contract ID.
   - If the contract ID is unknown, press F3 or double-click the right mouse button. A list of all service contracts for the customer site displays in Service Contract Entry (SN.001.00).
     - To select a contract ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Contract Maintenance PV List accesses Service Contract Entry (SN.001.00), enabling you to modify information for an existing service contract.
     - Clicking Insert on the Contract Maintenance PV List accesses Service Contract Entry (SN.001.00), enabling you to add new service contracts to the system.

5. Type the piece of equipment to be serviced on the service call in Equipment ID.
   - If the equipment ID is unknown, press F3 or double-click the right mouse button. A list of all pieces of equipment in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays. To select an equipment ID, highlight the ID and click OK, or double-click on the ID.
   - To restrict the Service Equipment possible values list by the customer ID and/or site ID entered in the screen header, select either or both of the Filter Equip ID check boxes.
   - Once a piece of equipment has been selected, the Warranty Start Date, Warranty End Date, and the Serial Number for the piece of equipment display.

Note: Clicking Equipment on the bottom of Service Call Entry (SD.200.00) displays Customer Equipment (SD.200.03). This subscreen displays all equipment associated with the customer site whether under a service contract or not.

6. Type a preventive maintenance code for the piece of equipment to be serviced on the service call in PM Code.
   - If the PM code is unknown, press F3 or double-click the right mouse button. A list of all preventive maintenance types in PM Code Maintenance (SE.002.00) of the Equipment Maintenance module displays.
     - To select a PM code, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the PM Code Maintenance PV List accesses PM Code Maintenance (SE.002.00), enabling you to modify information for an existing preventive maintenance code.
     - Clicking Insert on the PM Code Maintenance PV List accesses PM Code Maintenance (SE.002.00), enabling you to add new preventive maintenance codes to the system.
Note: PM Code in Service Call Entry (SD.200.00) is for informational purposes only.

Note: Clicking PM Tasks at the bottom of Service Call Entry (SD.200.00) accesses Service Contract - Equipment PM Tasks (SE.001.00). This screen displays the line item tasks of the PM Code for the service call.

7. If the piece of equipment has a warranty period, the Warranty Start Date and Warranty End Date display.
   - These fields are display-only and cannot be changed.
8. If the piece of equipment has a serial number, the serial number displays in Serial Nbr.
   - Serial Nbr is display-only and cannot be changed.
9. Type miscellaneous notes for the problem code associated with the service call in Note.
   - The length of Note is 60 characters.
   - Longer notes can be recorded using the Notes/Attachments icon.
10. After the technician has been to the customer location, enter the cause of the problem in Cause ID.
    - If the cause ID is unknown, press F3 or double-click the right mouse button. A list of all problem causes in Cause Code Maintenance (SD.014.00) displays.
      - To select a problem cause, highlight the ID and click OK, or double-click the ID.
      - Clicking Edit on the Problem Cause List accesses Cause Code Maintenance (SD.014.00), enabling you to modify information for an existing problem cause.
      - Clicking Insert on the Problem Cause List accesses Cause Code Maintenance (SD.014.00), enabling you to add new problem causes to the system.
    Note: Typically, customer service representatives do not know the cause of problems when entering the service call in Service Call Entry (SD.200.00). The cause of a problem is usually not known until the technician has been to the customer site.
    Note: Cause codes can be associated with the problem codes of a service call by dispatchers in Dispatch (SD.201.00) and Service Call Entry (SD.200.00).
11. After the technician has been to the customer location, enter the problem Resolution ID.
    If the resolution ID is unknown, press F3 or double-click the right mouse button. A list of all resolutions in Resolution Code Maintenance (SD.015.00) displays.
    - To select a resolution ID, highlight the ID and click OK, or double-click the ID.
    - Clicking Edit on the Resolutions List accesses Resolution Code Maintenance (SD.015.00), enabling you to modify information for an existing resolution.
    - Clicking Insert on the Resolutions List accesses Resolution Code Maintenance (SD.015.00), enabling you to add new resolutions to the system.
    Note: Typically, customer service representatives do not know the cause of problems when entering the service call in Service Call Entry (SD.200.00). The cause of a problem is usually not known until the technician has been to the customer site.
    Note: Resolution codes can be associated with the problem codes of a service call by dispatchers in Dispatch (SD.201.00) and Service Call Entry (SD.200.00).
Entering Other Information, Other Info Tab

Additional information may be entered into the Other Info tab; however, all the fields on this tab are optional. They are for informational purposes only.

To enter additional information:

1. Click the **Other Info** tab or press **ALT+O**. The **Other Info** tab displays.
2. Type the contact name of the person calling in the service request in **Caller Name**.
   - If **Attention** for the customer site is populated in **Site Maintenance (SD.025.00)**, its value defaults.
3. Type the purchase order number of the customer for the service call request in **Customer PO**.
   - If **P.O. Number** for the customer site is set to Required in **Site Maintenance (SD.025.00)**, then a **Purchase Order Number** must be entered before the service call can be saved.
   - If a **Blanket PO Number** is entered for the customer site in **Site Maintenance (SD.025.00)**, then that Purchase Order number displays.
4. If the customer has a security system, type the security access code that may be needed by the service technician(s) to obtain access into the building.
   - If a security code was entered in **Sec. Entry Code** for the customer site in **Site Maintenance (SD.025.00)**, the security code defaults.
5. If marketing programs are used to promote business, type the advertising method that influenced the customer to request services in **Media ID**.
   - If the media must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all media resources in **Media Buy Maintenance** (SD.012.00) displays.
     - To select a media ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Media Buy Maintenance PV List** accesses **Media Buy Maintenance** (SD.012.00), enabling you to modify information for an existing media resource.
     - Clicking **Insert** on the **Media Buy Maintenance PV List** accesses **Media Buy Maintenance** (SD.012.00), enabling you to add new media resources to the system.
   - The **Media ID** associated with the customer site defaults.

**Note:** **Advertising Media Performance Report** (SD.630.00) is used to report the revenue and the number of calls associated with media IDs. For more information, see “**Advertising Media Performance Report** (SD.630.00)” on page 499.

**Note:** Referral from other customers can be tracked with media codes.

6. Type the terms for the service call in **Terms ID**.
   - If the terms must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all terms in **Terms Maintenance** (21.270.00) displays.
     - To select a terms ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Terms Maintenance List** accesses **Terms Maintenance** (21.270.00), enabling you to modify information for existing terms.
     - Clicking **Insert** on the **Terms Maintenance List** accesses **Terms Maintenance** (21.270.00), enabling you to add new terms to the system.
   - The **Terms ID** associated with the customer site defaults to this field.
   - After the terms ID is selected, the description of the terms ID displays.

**Note:** Terms are used to create Due Date and Discount Date of an invoice in **Invoice & Memo** (08.010.00) when the invoice is printed for a service call in **Service Call Invoice** (SD.640.00) or **Service Call Invoice (SSRS)** (SD.643.00), and processed in **Service Invoice Printing - Keep/Delete** (SD.642.00). Due Date and Discount Date of an invoice are based on Invoice Date and Terms ID of the invoice.

**Note:** Multiple installment terms have no effect on Field Service Management modules. Multiple installment terms are processed when the batch of invoices is released in **Invoice & Memo** (08.010.00).

7. Type the payment method for the service call into **Pymt Method**.
   - If the payment method must be changed, click the down arrow to the right of **Pymt Method** to display a list of predefined values: Cash, Check, Discover, Visa, Master Card, American Express, or In House Charge.
   - Once the customer site is selected, the default payment method defaults from **Site Maintenance** (SD.025.00).
   - **Pymt Method** is used for informational purposes only.

8. **Invoice Status** indicates if the service call is open or closed.
   - **Invoice Status** is managed by the system.
9. **Invoice Handling** is used during *Invoice Entry* (SD.202.00) to assist the approval process prior to invoicing the service call.
   - Click the down arrow to the right of **Invoice Handling** to display the predefined list of options.
10. Once the Customer ID is selected for the service call and if the customer has credit card information attached in *Customer Maintenance* (08.260.00), **Credit Card Nbr**, **Card Type**, and **Expiration Date** are populated.
    - These fields are display-only.
11. Once the Customer ID is selected for the service call, **Current Balance**, other aging fields, and **Available Credit** defaults from *Customer Maintenance* (08.260.00).
    - These fields are display-only.
Saving the Service Call

When all the necessary information has been entered for the service call:

- You can save and release the service call for processing. Click Finish on the toolbar. The system saves and releases the service call while Service Call Entry (SD.200.00) is cleared for the next service call to be entered. The system assigns the Service Call ID if Auto Number Service Call is enabled in Service Series Setup Maintenance (SD.000.00).

  **Note:** Handling must be set to Release Now in order to have the service call display on Dispatch (SD.201.00).

  **Note:** Click Close on the toolbar to process the service call and close Service Call Entry (SD.200.00).

- To save the service call without releasing the service call and without closing Service Call Entry (SD.200.00), click Save on the toolbar. The system saves the service call and assigns the Service Call ID if Auto Number Service Call is enabled in Service Series Setup Maintenance (SD.000.00).

  **Note:** Handling can be set to any value.

- To save the service call without releasing the service call while closing Service Call Entry (SD.200.00), click Finish on the toolbar. The system saves the service call and assigns the Service Call ID if Auto Number Service Call is enabled in Service Series Setup Maintenance (SD.000.00) and closes Service Call Entry (SD.200.00).

  **Note:** Handling must be set to Release Later or Hold.
Entering a New Customer during Service Call Entry

To add a new customer:

1. Open Service Call Entry (SD.200.00) by choosing Module | Service Dispatch | Service Call Entry from the menu. Service Call Entry (SD.200.00) displays.

2. Click the New Customer tab. The New Customer tab displays.

3. Type the customer ID of the new customer in Customer ID.
   - If Auto Number Customer ID in Service Series Setup Maintenance (SD.000.00) is enabled, Customer ID is automatically assigned when Create is selected.
   - If Auto Number Customer ID in Service Series Setup Maintenance (SD.000.00) is enabled, Customer ID is display-only.

4. Type a default site identifier for the new customer in Site ID.
   
   Note: Site ID updates Dflt Ship To ID of the customer on the Order Management tab of Customer Maintenance (08.260.00). Dflt Ship To ID defaults to Site ID for new service calls in Service Call Entry (SD.200.00) when the customer is selected.

5. Type the site name for the new site in Description.

6. Type the name of the new customer in Name.
7. Type a contact person for the new site in **Attention**.
8. Type a salutation for the contract person in **Salutation**.
9. Type the address of the site in the two address fields: **Address 1** and **Address 2**.
10. Type the city where the site is located in **City**.
11. Type the state where the site is located in **State**.
12. Type the zip code of the site in **Zip**.
13. Type the country or region where the site is located in **Cntry**.
   - If the country or region ID is unknown, press **F3** or double-click the right mouse button. A list of all countries or regions in **Country/Region Maintenance (21.300.00)** displays.
     - To select a country or region, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Country/Region List** accesses **Country/Region Maintenance (21.300.00)**, enabling you to modify information for existing countries or regions.
     - Clicking **Insert** on the **Country/Region List** accesses **Country/Region Maintenance (21.300.00)**, enabling you to add new countries or regions to the system.
14. Type the class identifier for the new customer in the **Class ID**.
   - If the Class ID is unknown, press **F3** or double-click the right mouse button. A list of all Accounts Receivable customer classes in **Customer Class (08.290.00)** displays.
     - To select a class, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Customer Class List** accesses **Customer Class (08.290.00)**, enabling you to modify information for existing customer classes.
     - Clicking **Insert** on the **Customer Class List** accesses **Customer Class (08.290.00)**, enabling you to add new customer classes to the system.
15. Type the default salesperson identifier for the new site in **Salesperson**.
   - If the salesperson ID is unknown, press **F3** or double-click the right mouse button. A list of all salespersons in **Salesperson Maintenance (08.310.00)** displays.
     - To select a salesperson ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Salesperson List** accesses **Salesperson Maintenance (08.310.00)**, enabling you to modify information for existing salespersons.
     - Clicking **Insert** on the **Salesperson List** accesses **Salesperson Maintenance (08.310.00)**, enabling you to add new salespersons to the system.
16. Type the default terms identifier for the new customer in **Terms ID**.
   - If the terms ID is unknown, press **F3** or double-click the right mouse button. A list of all terms in **Terms Maintenance (21.270.00)** displays.
     - To select a terms ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Terms Maintenance List** accesses **Terms Maintenance (21.270.00)**, enabling you to modify information for existing terms.
     - Clicking **Insert** on the **Terms Maintenance List** accesses **Terms Maintenance (21.270.00)**, enabling you to add new terms to the system.

**Note:** Terms are used to create **Due Date** and **Discount Date** of an invoice in **Invoice & Memo (08.010.00)** when the invoice is printed for a service call in **Service Call Invoice (SD.640.00)** or **Service Call Invoice (SSRS) (SD.643.00)**, and processed in **Service Invoice Printing - Keep/Delete (SD.642.00)**. **Due Date** and **Discount Date** of an invoice are based on **Invoice Date** and **Terms ID** of the invoice.

**Note:** Multiple installment terms have no effect on Field Service Management modules. Multiple installment terms are processed when the batch of invoices is released in **Invoice & Memo (08.010.00)**.
17. Type the default tax identifier for the new site in Tax ID.
   - If the tax ID is unknown, press F3 or double-click the right mouse button. A list of all taxes in Tax Maintenance (21.280.00) displays.
     - To select a tax ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.

18. Type the default credit card number for the new customer in Card Nbr.

19. Type the default name on the credit card for the new customer in Card Holder Name.

20. Type the default credit card type for the new customer in Type.

21. Type the expiration date of the credit card in Expiration Date.

22. Type the phone number for the new site in Phone/Ext.
   - Ext. can contain a maximum of four digits.

23. Type the fax number for the new site in Fax/Ext.
   - Ext. can contain a maximum of four digits.

24. Select Print Statements to print a statement for the customer each time you print statements for the customer’s statement cycle.

   Note: The Statement Cycle defaults to the code set up in the Customer Defaults tab of AR Setup (08.950.00).

25. Type the default Branch identifier for the branch responsible for the new site in Branch ID.
   - If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches in Branch Maintenance (SD.001.00) displays.
     - To select a branch ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new branches to the system.

26. Type the default call type identifier of the call type, line of business, or division to associate with the new customer in Call Type.
   - If the call type ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in Call Type Maintenance (SD.003.00) displays.
     - To select a call type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to modify information for an existing call type.
     - Clicking Insert on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to add new call types to the system.
27. Type the default call status identifier of the call status to associate with the new customer in **Call Status**.
   - If the call status ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses in **Call Status Maintenance** (SD.002.00) displays.
     - To select a call status ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Call Status Maintenance PV List** accesses **Call Status Maintenance** (SD.003.00), enabling you to modify information for an existing call status.
     - Clicking **Insert** on the **Call Status Maintenance PV List** accesses **Call Status Maintenance** (SD.003.00), enabling you to add new call statuses to the system.

28. Type the default dwelling identifier defining the dwelling to associate with the new site in **Dwelling**.
   - If the dwelling ID is unknown, press F3 or double-click the right mouse button. A list of all dwelling types in **Dwelling Maintenance** (SD.005.00) displays.
     - To select a dwelling ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Dwelling Maintenance PV List** accesses **Dwelling Maintenance** (SD.005.00), enabling you to modify information for existing dwelling types.
     - Clicking **Insert** on the **Dwelling Maintenance PV List** accesses **Dwelling Maintenance** (SD.005.00), enabling you to add new dwelling types to the system.

29. Type the default geographic zone identifier to associate with the new site in **Geo Zone ID**.
   - If the geographic zone ID is unknown, press F3 or double-click the right mouse button. A list of all geographic zones in **Geographic Zone Maintenance** (SD.009.00) displays.
     - To select a geographic ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Geographic Zone Maintenance PV List** accesses **Geographic Zone Maintenance** (SD.009.00), enabling you to modify information for existing geographic zones.
     - Clicking **Insert** on the **Geographic Zone Maintenance PV List** accesses **Geographic Zone Maintenance** (SD.009.00), enabling you to add new geographic zones to the system.

30. Select the default priority associated with a new service call in **Priority**.
    - Clicking the down arrow to the right of **Priority** displays a predefined list set up: Premium, High, Medium, and Low.

    **Note:** In **Dispatch** (SD.201.00), users can restrict service calls displayed by priority. For example, the dispatcher can view all open service calls with a Premium priority.

31. Type the ID of the technician responsible for completing the work on the service calls for the new site in **Technician**.
    - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians in **Employee Maintenance** (SD.007.00) displays.
      - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing technician.
      - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new technicians to the system.
32. Type the ID of the project manager who is responsible for the new site in **Proj. Manager**.
   - If the project manager ID is unknown, press **F3** or double-click the right mouse button. A list of all employees in **Employee Maintenance (SD.007.00)** displays.
     - To select an employee ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance (SD.007.00)**, enabling you to modify information for an existing employee.
     - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance (SD.007.00)**, enabling you to add new employees to the system.

33. Click **Create** to have the system generate a customer record in **Customer Maintenance (08.260.00)** of **Account Receivable**, a ship-to address record in **Shipping Address (08.262.00)** of **Account Receivable**, and a customer site record in **Site Maintenance (SD.025.00)** of **Service Dispatch**.
   - When the new customer is created, the system checks for duplicate Customer IDs.
   - Click **OK** to close **Create Customer Record**, the message that lists **Created Customer ID** and **Site ID**.

**Note:** The **Service Call Info** tab of **Service Call Entry (SD.200.00)** displays.
Creating a New Service Call Using Duplicate Call

To create a new service call by copying an existing one, use the Duplicate Call button to the right of Service Call ID on Service Call Entry (SD.200.00).

To copy an existing service call:
1. Open Service Call Entry (SD.200.00).
2. Click Duplicate Call next to Service Call ID. Duplicate Service Call (SD.200.05) appears.
3. Enter the ID of the service call you want to copy.
   To search for a service call ID, click Call Lookup. Service Call Lookup (SD.303.00) appears.

Figure 56: Duplicate Service Call (SD.200.05)

Figure 57: Service Call Lookup (SD.303.00)
4. (Optional) Click **Customer Lookup**. **Customer Lookup** (SD.305.00) appears.

5. Select one or more criteria for your customer search. For example, you are looking for a customer in Boston, so you select City in **Search by**, in **Using**, you select Begins with, and in **Search Info**, you type **Bos**.

   - **Search by** — Find the customer using a specific field. The options are:
     - Site Name
     - Attention
     - Description
     - Address 1
     - Address 2
     - City
     - Postal Code
     - Phone
     - Equipment ID
     - Asset ID
     - Serial Number
     - Model ID
     - Address User1
     - Address User2
     - Address User5
     - Address User6

   - **Using** — Select an option to narrow your customer search, and then enter text in **Search Info** to complete the criteria. The options are:
     - Begins with — Enter the first few characters of the search criteria.
     - Contains — Enter text that occurs anywhere in the search info.
- **Search Info** — Enter text to complete the search criteria.

6. To view the search results, click **Refresh**.

7. Locate the correct customer, click the customer’s detail line, and then click **Select**. This returns you to **Service Call Lookup** (SD.303.00). Note that the selected customer’s ID appears.

8. Click **Refresh**. The customer’s service calls appear in the grid.

9. Select the service call you want to copy, and then click **Select**. **Duplicate Service Call** (SD.200.05) appears again with the service call ID you selected appearing in **Service Call ID**.

10. Click **OK**. Details from the service call you selected appear on **Service Call Entry** (SD.200.00).

   To exit **Duplicate Service Call** (SD.200.05) without copying the service call, click **Cancel**.

11. Add any information that is still needed to complete your service call entry.

12. Click **Save** to create a new service call from a copy of the one you selected.
Canceling a Service Call

To cancel a service call:

1. Open Service Call Entry (SD.200.00) by choosing Module | Service Dispatch | Service Call Entry from the menu.

   Service Call Entry (SD.200.00) displays.

   ![Service Call Entry (SD.200.00) Displayed](image)

   Figure 59: Service Call Entry (SD.200.00)

2. Type the identifier of the service call to be cancelled in the Service Call ID.
   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all service calls in Service Call Entry (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click OK, or double-click the ID.

3. Type the identifier of a cancelled service call in Call Status.
   - If the cancelled call status must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses in Call Status Maintenance (SD.002.00) displays.
     - To select the cancelled call status ID, highlight the ID and click OK, or double-left click the ID.
4. Choose Completed from the drop-down list in Handling.

Note: Because both completed and cancelled service calls will have a Handling of Completed, it is recommended that you have one Call Status of COMPLETED and another Call Status of CANCELLED. Two separate call statuses allow users to distinguish between service calls that had all of the work performed and service calls that were cancelled by the customer.

5. Click Yes to cancel the service call when Call Handling Critical Warning appears, or click No to cancel the outstanding changes to the service call record.

6. On the toolbar, click Save and then Close.

Note: Call Cancellation Error appears if time and material detail line items are entered for the service call in Invoice - T & M Details (SD.203.00). If this message appears, you cannot cancel the service call, and the system sets Handling back to the original value.

7. Click OK to close the Call Cancellation Error message.

8. Click Close on the toolbar.
Creating a Service Call Quote

**Note:** You can display and print a quote from the Service Dispatch module Reports menu. For more information, see “T&M Quote (SD.633.00)” on page 533.

**Entering Header Information**

To create a service call quote:

1. Open **Service Call Entry (SD.200.00)** by choosing **Module | Service Dispatch | Service Call Entry** from the menu.

   *Service Call Entry (SD.200.00)* displays.

2. (Optional) The identification code assigned to the company you are currently working in appears in **Company ID**. To enter a service call for another company, type that company’s ID.

3. Select **Quote** from the drop-down list in **Handling**.

4. Type the identifier of the new service call quote in **Service Call ID**.
   - If **Auto Number Service Call ID** in **Service Series Setup Maintenance (SD.000.00)** is enabled, **Service Call ID** is automatically assigned when **Save** or **Finish** is clicked.

*Figure 60: Service Call Entry (SD.200.00)*
5. Type the customer identifier associated with the service call in **Customer ID**.
   - After typing the Customer ID, click the ellipsis (...) button to the left of **Customer ID** to open **Customer Maintenance** (08.260.00) in the Accounts Receivable module.
   - If the customer ID is unknown, you can:
     a) Press F3 or double-click the right mouse button.
        A list of all active customers displays by Customer ID in ascending order. If a large number of active customers exist in the system, the list may take some time to display.
     b) To select a customer ID, highlight the ID and click **OK**, or double-click the ID.

   **Note:**
   - When selecting a customer in **Service Call Entry** (SD.200.00), the Dflt Ship To ID on the Order Management tab associated with the customer in **Customer Maintenance** (08.260.00) of Accounts Receivable populates Site ID in **Service Call Entry** (SD.200.00).
   - If no Dflt Ship To ID is associated with the customer, Site ID in **Service Call Entry** (SD.200.00) must be selected manually.

   **-OR-**
   a) Click **Customer Lookup**. **Customer Lookup** (SD.305.00) appears.
   b) Click the down arrow to the right of **Search By**. A list of possible filters for your search appears.
      The search engine can locate a customer based on Site Name, Attention, Description, Address 1, Address 2, City, Postal Code, Phone, Equipment ID, Asset ID, Serial Number, Model ID, Address User1, Address User2, Address User5, and Address User6.
   c) Select one of the values in **Search By**.

   **Note:**
   - We recommend that you base searches on Address 1, because typically that address is unique to a customer site. You can also use Phone Number for quick searches.
   - The Customization Manager module can be used to add Address User1, Address User2, Address User5, and Address User6 of the SOADDRESS table to Site Maintenance (SD.025.00). The search engine allows users to locate a customer and site by the information entered in these user fields.
   d) Refine your search in **Using** by selecting Begins with or Contains from the list that appears when you click the down arrow.
   e) In **Search Info**, type information to narrow the search further. You can enter partial data.

   **Example:** For example, your customer is located at 3700 Oak Street. You select Address 1 from the **Search By** list, Begins with from the **Using** list, and then enter 3700 in **Search Info**.
   f) Click **Search**.

6. Select the **Filter Equip ID** check box next to **Cust ID** if you would like to restrict the results of the possible values list for Equip ID to include only information for this specific customer. This check box can be used in conjunction with the **Filter Equip ID** check box for Site ID.
7. Type the customer’s site identifier associated with the service call in **Site ID**. If the site must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all sites for the customer is displayed.
   - To select a site ID, highlight the ID and click **OK**, or double-click the ID.

   **Note:** Click the ellipsis (...) button to the left of **Site ID** to open **Site Maintenance** (SD.025.00).
   - Once **Site Maintenance** (SD.025.00) has been accessed, existing sites associated with the customer can be viewed and edited while new sites can be added.
   - Once a **Site ID** has been selected, the Site **Attention**, Site **Address 1**, Site **Address 2**, Site **City**, Site **State**, Site **Zip**, and Site **Telephone Number** associated with the customer site are populated. When a **Site ID** is associated with a service call, the following fields default from the customer site: **Branch ID**, **Call Type**, **Call Status**, **Primary Tech**, and **Priority**.

   **Note:** When selecting a customer in **Service Call Entry** (SD.200.00), the **Dflt Ship To ID** on the **Order Management** tab associated with the customer in **Customer Maintenance** (08.260.00) of Accounts Receivable populates **Site ID** in **Service Call Entry** (SD.200.00).

   **Note:** If no Dflt Ship To ID is associated with the customer, **Site ID** in **Service Call Entry** (SD.200.00) must be selected manually.

8. Select the **Filter Equip ID** check box next to **Site ID** if you would like to restrict the results of the possible values list for **Equip ID** to include only information for this specific site. This check box can be used in conjunction with the **Filter Equip ID** check box for **Cust ID**.

9. Type the branch identifier of the branch responsible for completing the work on the service call in **Branch ID**.
   - After entering a site, the default **Branch ID** for the customer site displays.
   - If the branch ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all branches in **Branch Maintenance** (SD.001.00) displays.
     - To select a branch ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Branch Maintenance PV List** accesses **Branch Maintenance** (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking **Insert** on the **Branch Maintenance PV List** accesses **Branch Maintenance** (SD.001.00), enabling you to add new branches.

10. Type the project identifier of the project associated with the service call in **Project ID**.
    - If the project ID is unknown, press F3 or double-click the right mouse button. A list of all projects in **Project Maintenance** (PA.PRJ.00) in the Project Controller module displays.
      - To select a project ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Active Projects in Login Company List** accesses **Project Maintenance** (PA.PRJ.00), enabling you to modify information for an existing project.
      - Clicking **Insert** on the **Active Projects in Login Company List** accesses **Project Maintenance** (PA.PRJ.00), enabling you to add new projects.
11. Type the contract identifier of the contract entered in Service Contract Entry (SN.001.00) and associated with the service call in **Contract ID**.
   - If the contract ID is unknown, press F3 or double-click the right mouse button. A list of all service contracts set up in Service Contract Entry (SN.001.00) displays.
   - Clicking on the ellipsis (…) button to the left of **Contract ID** displays a list of active service contracts for the customer site.
   - When a service contract is associated with a service call, **Call Type, Primary Tech**, or **Priority** default from the service contract.
   - Attaching a service contract to a service call allows special pricing associated with the service contract during invoicing.
   - If **Active Contract Notification** is selected in Service Series Setup Maintenance (SD.000.000) and the customer site has active service contracts, a warning message displays.

12. Type the call type identifier of the call type, line of business, or division associated with the service call in **Call Type**.
   - If the call type must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in Call Type Maintenance (SD.003.00) displays.
     - To select a call type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Call Type Maintenance PV List** accesses Call Type Maintenance (SD.003.00), enabling you to modify information for an existing call type.
     - Clicking **Insert** on the **Call Type Maintenance PV List** accesses Call Type Maintenance (SD.003.00), enabling you to add new call types to the system.
   - The call type associated with the customer site defaults.
   - If a service contract is attached to the service call, the call type associated with the service contract defaults.

   **Note:** Call Type determines the subaccount to be used during the invoice entry process. The subaccount defaults from the call type unless **Use Sub from Site** is selected in Call Type Maintenance (SD.003.00).

13. Type the call status identifier of the call status associated with the service call in **Call Status**.
   - If the call status must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.
     - To select a call status ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Call Status Maintenance PV List** accesses Call Status Maintenance (SD.003.00), enabling you to modify information for an existing call status.
     - Clicking **Insert** on the **Call Status Maintenance PV List** accesses Call Status Maintenance (SD.003.00), enabling you to add new call statuses to the system.
   - The call status associated with the customer site defaults.

14. Type the requested start date for the service call in **Promised Date**.
   - **Promised Date** defaults to the current system date unless the call is outside normal business hours.
   - If the service call is entered outside of normal business hours, the date defaults to the next business date.
   - **Promised Date** may be overridden during entry of the service call.
15. Type the range of times that a service call is to be performed in the **Time From** and **Time To**.
   - **Time From** is calculated using the time of the system plus the **Service Call Lead Time** entered in *Service Series Setup Maintenance* (SD.000.00).
   - **Time To** is calculated by **Time From** plus the **Service Call Range Time** entered in *Service Series Setup Maintenance* (SD.000.00).
   - The default values for **Time From** and **Time To** can be overridden during entry.

16. Type the identifier of the technician responsible for completing the work on the service call in **Primary Tech**.
   - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in *Employee Maintenance* (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Employee Maintenance PV List** accesses *Employee Maintenance* (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking **Insert** on the **Employee Maintenance PV List** accesses *Employee Maintenance* (SD.007.00), enabling you to add new technicians to the system.
   - After the site is entered, the default technician for the customer site displays.
   - If a service contract is attached to the service call, the primary technician associated with the service contract defaults.

17. Select the priority assigned to the service call in **Priority**.
   - Clicking the down arrow to the right of **Priority** displays a predefined list set up by: Premium, High, Medium, or Low
   - After typing in the site, the default priority for the customer site displays.
   - If a service contract is attached to the service call, the priority associated with the service contract defaults.
   - During the dispatching process, users can restrict service calls that display on dispatching screens by service call priority. For example, a dispatcher can view only open or in-progress service calls with a premium priority.
Entering Line Items, Service Call Info Tab

To enter line items:

1. Type the code that describes the reason for the service call in Problem Code.
   - If the problem code ID is unknown, press F3 or double-click the right mouse button. A list of all problem codes associated with Call Type in Service Call Entry (SD.200.00) displays.
     - To select a problem code ID, highlight the ID and click OK, or double-click the ID.
   - After a problem code has been selected, the problem code description defaults to Description/Problem Name.
   - Multiple problem codes can be attached to the service call.
   - Using problem codes is optional when creating a service call.
   - If Prompt Operator is selected for the problem code in Problem Code Maintenance (SD.008.00), a window showing the text entered in Notes for the problem code appears.

   **Note:** This feature allows customer service representatives to give the best service by asking the appropriate questions to get information needed to complete a service call without having to spend large amounts of time and money for training.

2. Type the identifier of the technician responsible for performing the work to complete the problem code in Technician ID.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Maintenance List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking Insert on the Employee Maintenance List accesses Employee Maintenance (SD.007.00), enabling you to add new technicians to the system.

   **Note:** Normally, customer service representatives do not know the technicians responsible for completing the work on a service call. Technicians are assigned to the service call during the dispatching process.

3. Type the estimated amount of time for performing the work to complete the problem code in Duration.
   - Duration defaults from Estimated Time Duration in Problem Code Maintenance (SD.008.00) for the problem code in Problem Code ID.

4. Type the contract ID of the contract entered in Service Contract Entry (SN.001.00) and associated with the service call.
   - If the contract ID is unknown, press F3 or double-click the right mouse button. A list of all service contracts in Service Contract Entry (SN.001.00) displays.
     - To select a contract ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Contract Maintenance PV List accesses Service Contract Entry (SN.001.00), enabling you to modify information for an existing service contract.
     - Clicking Insert on the Contract Maintenance PV List accesses Service Contract Entry (SN.001.00), enabling you to add new service contracts to the system.
5. Type the piece of equipment that will be serviced on the service call in **Equipment ID**.
   - If the equipment ID is unknown, press F3 or double-click the right mouse button. A list of all pieces of equipment set up in *Equipment Entry* (SE.001.00) of the Equipment Maintenance module displays. To select an equipment ID, highlight the ID and click **OK**, or double-click the ID.
   - To restrict the Service Equipment possible values list by the customer ID and/or site ID entered in the screen header, select either or both of the **Filter Equip ID** check boxes as needed.
   - Once a piece of equipment has been selected, the **Warranty Start Date**, **Warranty End Date**, and the **Serial Number** for the piece of equipment display.

   **Note:** Clicking **Equipment** on the bottom of *Service Call Entry* (SD.200.00) displays *Customer Equipment* (SD.200.03). This subscreen displays all equipment associated with the customer site whether under a service contract or not.

6. Type a preventive maintenance code for the piece of equipment to be serviced on the service call in **PM Code**.
   - If the PM code ID is unknown, press F3 or double-click the right mouse button. A list of all preventive maintenance records set up in *PM Code Maintenance* (SE.002.00) of the Equipment Maintenance module displays.
     - To select a PM code, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **PM Code Maintenance PV List** accesses *PM Code Maintenance* (SE.002.00), enabling you to modify information for an existing preventive maintenance code.
     - Clicking **Insert** on the **PM Code Maintenance PV List** accesses *PM Code Maintenance* (SE.002.00), enabling you to add new preventive maintenance codes to the system.

   **Note:** Entering a PM code in the *Service Call Entry* (SD.200.00) is for informational purposes only.

   **Note:** Clicking **PM Tasks** at the bottom of *Service Call Entry* (SD.200.00) accesses *Service Contract - Equipment PM Tasks* (SE.001.00). This screen displays the line item tasks of the PM code for the service call.

7. If the piece of equipment has a warranty period, the **Warranty Start Date** and **Warranty End Date** display.
   - These fields are display-only and cannot be changed.

8. If the piece of equipment has a serial number, the serial number will display in **Serial Nbr**.
   - **Serial Nbr** is display-only and cannot be changed.

9. Type miscellaneous notes for the problem code associated with the service call in **Note**.
   - The length of **Note** is 60 characters.
   - Longer notes can be recorded using the **Notes/Attachments** icon.

10. After the technician has been to the customer location, the cause of the problem can be entered into **Cause ID**.
    - Data is typically not entered in **Cause ID** during service call entry.
    - If the cause ID is unknown, press F3 or double-click the right mouse button. A list of all problem causes in *Cause Code Maintenance* (SD.014.00) displays.
      - To select a problem cause ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Problem Cause List** accesses *Cause Code Maintenance* (SD.014.00), enabling you to modify information for an existing problem cause.
Clicking **Insert** on the **Problem Cause List** accesses **Cause Code Maintenance (SD.014.00)**, enabling you to add new problem causes to the system.

**Note:** Typically, customer service representatives do not know the cause of problems when entering the service call in **Service Call Entry (SD.200.00)**. The cause of a problem is usually not known until the technician has been to the customer site.

**Note:** Cause codes can be associated with the problem codes of a service call by dispatchers in **Dispatch (SD.201.00)** and **Service Call Entry (SD.200.00)**.

11. After the technician has been to the customer location, the resolution for the problems can be entered into **Resolution ID**.
   - Data is typically not entered in **Resolution ID** during service call entry.
   - If the resolution ID is unknown, press F3 or double-click the right mouse button. A list of all resolutions set up in **Resolution Code Maintenance (SD.015.00)** displays.
     - To select a resolution ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Resolutions List** accesses **Resolution Code Maintenance (SD.015.00)**, enabling you to modify information for an existing resolution.
     - Clicking **Insert** on the **Resolutions List** accesses **Resolution Code Maintenance (SD.015.00)**, enabling you to add new resolutions to the system.

**Note:** Typically, customer service representatives do not know the cause of problems when entering the service call in **Service Call Entry (SD.200.00)**. The cause of a problem is usually not known until the technician has been to the customer site.

**Note:** Resolution codes can be associated with the problem codes of a service call by dispatchers in **Dispatch (SD.201.00)** and **Service Call Entry (SD.200.00)**.

12. Click **Save** on the toolbar.
Entering Other Information, Other Info Tab

You can enter additional information on the Other Info tab. The fields on this tab are optional and are for informational purposes only.

To enter additional information:

1. Click the Other Info tab, or press ALT+O. The Other Info tab displays.
2. **Company ID** is display-only and defaults based on the current processing company when the service call is saved.
3. Type the contact name for the person calling in the service request in **Caller Name**.
   - If Attention for the customer site is populated in Site Maintenance (SD.025.00), then that value defaults in this field.
4. Type the purchase order number of the customer for the service call request in **Customer PO**.
   - If P.O. Number for the customer site is set to Required in Site Maintenance (SD.025.00), then a Purchase Order Number must be entered before the service call can be saved.
   - If a Blanket PO Number was entered for the customer site in Site Maintenance (SD.025.00), then that Purchase Order number displays.
5. If the customer has a security system, type the security access code that may be needed by the service technician(s) to obtain access into the building.
   - If a security code for the customer site was entered in Sec. Entry Code in Site Maintenance (SD.025.00), the security code defaults to this field.
6. If marketing programs are used to promote business, type the advertising method that influenced the customer to request services in **Media ID**.
   - If the media ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all media resources in Media Buy Maintenance (SD.012.00) displays.
     - To select a media ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Media Buy Maintenance PV List accesses Media Buy Maintenance (SD.012.00), enabling you to modify information for an existing media resource.
     - Clicking Insert on the Media Buy Maintenance PV List accesses Media Buy Maintenance (SD.012.00), enabling you to add new media resources to the system.
   - The Media ID associated with the customer site defaults.

**Note:** Advertising Media Performance Report (SD.630.00) is used to report the revenue and the number of calls associated with media IDs. For more information, see “Advertising Media Performance Report (SD.630.00)” on page 499.

**Note:** Referral from other customers can be tracked with media codes.

7. Type the terms for the service call in **Terms ID**.
   - If the terms ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all terms set up in Terms Maintenance (21.270.00) displays.
     - To select a terms ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Terms Maintenance List accesses Terms Maintenance (21.270.00), enabling you to modify information for existing terms.
     - Clicking Insert on the Terms Maintenance List accesses Terms Maintenance (21.270.00), enabling you to add new terms to the system.
   - The Terms ID associated with the customer defaults in this field.
   - After the terms ID is selected, the description of the terms ID displays in Terms Description.
Note: Terms are used to create Due Date and Discount Date of an invoice in Invoice & Memo (08.010.00) when the invoice is printed for a service call in Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00), and processed in Service Invoice Printing - Keep/Delete (SD.642.00). Due Date and Discount Date of an invoice are based on Invoice Date and Terms ID of the invoice.

Note: Multiple installment terms have no effect on Field Service Management modules. Multiple installment terms are processed when the batch of invoices is released in Invoice & Memo (08.010.00).

8. Type the payment method for the service call into Pymt Method.
   - If the payment method is unknown, click the down arrow to the right of Pymt Method to display a list of predefined values: Cash, Check, Discover, Visa, Master Card, American Express, or In House Charge.
   - Once the customer site is selected, the default payment method defaults from Site Maintenance (SD.025.00).

9. Invoice Status indicates if the service call is open or closed.
   - Invoice Status is managed by the system.

10. Invoice Handling is used during Invoice Entry (SD.202.00) to assist the approval process prior to invoicing the service call.
    - Click the down arrow to the right of Invoice Handling to display the predefined list of options.

11. Note that Source Svc Call ID contains the identifier of the service call you duplicated to create the current service call.

12. Once the Customer ID is selected for the service call and if the customer has credit card information attached in Customer Maintenance (08.260.00), Credit Card Nbr, Credit Card Type, and Expiration Date are populated.
    - These fields are display-only.

13. Once the Customer ID is selected for the service call, Current Balance, other aging fields, and Available Credit defaults from Customer Maintenance (08.260.00).
    - These fields are display-only.

14. Click Save on the toolbar.

15. Click Close on the toolbar.
Viewing Service Calls Not Completed

To view a service call not completed:
1. Open Service Call Entry (SD.200.00) by choosing Module | Service Dispatch | Service Call Entry from the menu.
   Service Call Entry (SD.200.00) displays.
2. Type the identifier of the service call to be viewed in the Service Call ID.
   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all completed service calls set up in Service Call Entry (SD.200.00) displays.
   - To select a service call ID, highlight the ID and click OK, or double-click the ID.
3. Click Close on the toolbar.

Note: To view a list of open service calls, use “Open Service Call List (SD.620.00)” on page 509.

Viewing Completed Service Calls

To view a completed service call:
1. Open Service Call Entry (SD.200.00) by choosing Module | Service Dispatch | Service Call Entry from the menu.
   Service Call Entry (SD.200.00) displays.
2. Select Completed Calls.
3. Type the identifier of the service call to be viewed in the Service Call ID.
   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all completed service calls set up in Service Call Entry (SD.200.00) displays.
   - To select a service call ID, highlight the ID and click OK, or double-click the ID.
4. Click Close on the toolbar.

Note: To view a listing of completed service calls that are billable, use “Billable - Completed Calls (SD.623.00)” on page 500.
Dispatching

Introduction to Dispatching

Both Dispatch (SD.201.00) and Graphical Dispatch Board (SD.900.00) enable users to perform the functions related to viewing open service calls after the calls have been entered in Service Call Entry (SD.200.00). Service Dispatch allows dispatching departments to manage open service calls efficiently because the system gives users the flexibility to view open service calls in a variety of ways. For example, users can set up one call view template to display only service calls for one branch, a second call view to display only service calls for one technician, and another call queue to display only service calls with a high priority.

Note: You can also run a report of open service calls. For more information, see “Open Service Call List (SD.620.00)” on page 509.

Dispatching service calls is a two-step process. First, users can set up call view templates in Dispatch - View Maintenance (SD.004.00). Dispatch - View Maintenance (SD.004.00) allows users to set up an unlimited number of call viewing queues. Second, users can display open service calls in a number of ways using Dispatch (SD.201.00) and/or Graphical Dispatch Board (SD.900.00).
Viewing All Open Service Calls

Creating a Call View Template

To create a call view template:

1. Choose **Module | Service Dispatch | Dispatch - View Maintenance** from the menu.

   *Dispatch - View Maintenance (SD.004.00)* displays.

   ![Dispatch - View Maintenance (SD.004.00)](image)

   *Figure 61: Dispatch - View Maintenance (SD.004.00)*

2. Type a call view template identifier indicating that all open service calls display in *Dispatch (SD.201.00)* in **Call View**.
   - For example, type ALL in **Call View**.

3. Type a call view template description indicating that all open service calls display in *Dispatch (SD.201.00)* in **Description**.
   - For example, type All Open Service Calls in **Description**.

4. Verify that the check boxes to the left of **Premium, High, Medium** and **Low** in the **Priority** frame are selected.
   - **Premium, High, Medium**, and **Low Priority** default to selected when creating new call view templates in *Dispatch - View Maintenance (SD.004.00)*.

5. Verify that the **All** check box to the right of **Branch ID** is selected.
   - Choosing **All** to the right of **Branch ID** allows users to view all open service calls for every branch simultaneously.
   - The **All** check box to the right of the **Branch ID** defaults to selected when creating new call view templates in *Dispatch - View Maintenance (SD.004.00)*.

6. Verify that the **All** check box to the right of **Technician** is selected.
   - Choosing **All** to the right of **Technician** allows users to view all of the open service calls for all technicians simultaneously.
   - The **All** check box to the right of the **Technician** defaults to selected when creating new call view templates in *Dispatch - View Maintenance (SD.004.00)*.

7. Press the **Call Type** button and insure the grid is empty.

8. Press the **Call Status** button and insure the grid is empty.

9. Press the **Geographic** button and insure all geographic zones are listed in the grid.

   *Note:* This step is required for the *Graphical Dispatch Board (SD.900.00)*. For *Dispatch (SD.201.00)*, leaving the grid empty has the same effect as listing all geographic zones.

10. Click **Save** on the toolbar.

11. Click **Close** on the toolbar.
Viewing All Open Service Calls, Dispatch (SD.201.00)

To view all open service calls:

1. Choose **Module | Service Dispatch | Dispatch** from the menu. 
   *Dispatch (SD.201.00) displays.*

2. Type the ID of the call view template denoting all open service calls in **Queue ID**.
   *For example, type ALL.*
   *If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates in **Dispatch - View Maintenance (SD.004.00)** displays.*

3. Type a range of dates to restrict the view of service calls displayed on **Dispatch (SD.201.00)** using **From** and **To**.
   *From defaults to seven days prior to the current date.*
   *To defaults to the current date.*
   *All open service calls with a promised date between the specified date range displays.*

   **Note:** Customer service representatives typically view service calls for a single day.

4. Click **Query Now** to display all open service calls for the starting and ending date range specified in **From** and **To**.
   *All open service calls with a promised date between the specified date range display.*

5. Click **Close** on the toolbar.
Viewing All Open Service Calls, Graphical Dispatch Board (SD.900.00)

To view all open service calls:

Note:

- If Queue ID is blank, the Graphical Dispatch Board (SD.900.00) displays all open service calls by default.
- If you choose to use a queue ID you will need a call queue view that lists all geographic zones, and selects all priorities and all branch IDs

1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Options tab of Graphical Dispatch Board (SD.900.00) appears.

2. Type the identifier of the Call Queue View template denoting all open service calls for the company in Queue ID. If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates set up in Dispatch - View Maintenance (SD.004.00) appears.

   The General tab of Graphical Dispatch Board (SD.900.00) appears. Review the tab’s contents to ensure all priority check boxes are selected, the All check box is selected for branch IDs, and all geographic zones are listed in the grid.

3. Click the Dispatch Board tab. The Dispatch Board tab of Graphical Dispatch Board (SD.900.00) appears. The schedule pane on the right side of the top section displays in Day View. You can switch from Day View to Week View by right-clicking on the date bar and selecting Week View.

   All open service calls are included in the service call details pane. Some service calls may appear under more than one status tab. This occurs when a call has multiple problem codes and each problem code status is different.

![Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View](image-url)
Viewing All Open Service Calls for a Specific Priority

Note: The Graphical Dispatch Board (SD.900.00) does not filter the schedule pane portion of the screen by priority.

Creating a Call View Template for a Specific Priority

To create a call view template for a specific priority:

1. Choose Module | Service Dispatch | Dispatch from the menu.
   
   Dispatch - View Maintenance (SD.004.00) displays.

   Figure 64: Dispatch - View Maintenance (SD.004.00)

   2. Type a call view template identifier indicating that all premium priority open service calls display in Dispatch (SD.201.00) in Call View.
      
      For example, type PREMIUM in Call View.

   3. Type a call view template description indicating that all Premium Priority open service calls in Dispatch (SD.201.00) in Description.
      
      For example, type Premium Priority Service Calls in Description.

   4. Verify that the check box to the left of Premium in the Priority frame is selected.
      
      Premium, High, Medium, and Low Priority are selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

   5. Clear the check boxes to the left of High, Medium, and Low in the Priority frame.
      
      Premium, High, Medium, and LowPriority are selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

   6. Verify that the All check box to the right of Branch ID is selected.
      
      The All check box to the right of the Branch ID allows users to view open service calls for every branch simultaneously.
      
      The All check box to the right of the Branch ID is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

   7. Verify that the All check box to the right of Technician is selected.
      
      Choosing All to the right of Technician allows users to view all of the open service calls for all technicians simultaneously.
      
      The All check box to the right of Technician is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

   8. Click Save on the toolbar.

   9. Click Close on the toolbar.
Viewing Open Service Calls for a Specific Priority, Dispatch (SD.201.00)

To view all premium priority service calls:
1. Choose Module | Service Dispatch | Dispatch from the menu.
   *Dispatch (SD.201.00) displays.*

   ![Dispatch (SD.201.00)](image)

   *Figure 65: Dispatch (SD.201.00)*

2. Type the ID of the call view template denoting all premium priority service calls in **Queue ID**.
   - For example, type PREMIUM.
   - If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates in Dispatch - View Maintenance (SD.004.00) displays.

3. Type a range of dates to restrict the view of service calls displayed on Dispatch (SD.201.00) using **From** and **To**.
   - **From** defaults to seven days prior to the current date.
   - **To** defaults to the current date.
   - All open service calls with a promised date between the specified date range display.

   **Note:** Customer service representatives typically view service calls for a single day.

4. Click **Query Now** to display all open service calls for the starting and ending date range specified in **From** and **To**.
   - All open service calls with a premium priority and a promised date between the specified date range display.

5. Click **Close** on the toolbar.
Viewing All Open Service Calls for a Specific Branch

Note: The Graphical Dispatch Board (SD.900.00) does not filter the Gantt chart portion of the screen by branch.

Creating a Call View Template for a Specific Branch

To create a call view template for a specific branch:

1. Choose Module | Service Dispatch | Dispatch - View Maintenance from the menu. Dispatch - View Maintenance (SD.004.00) displays.

2. Type a call view template identifier identifying that all open service calls for a specific branch display in Dispatch (SD.201.00) in Call View.
   - For example, type AKRON.

3. Type a call view template description indicating that all open service calls for a specific branch display in Dispatch (SD.201.00) in Description.
   - For example, type Akron Branch in Description.

4. Verify that the check boxes to the left of Premium, High, Medium and Low in the Priority frame are selected.
   - Premium, High, Medium, and Low Priority are selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

5. Clear the All check box to the right of Branch ID.
   - The All check box to the right of the Branch ID is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

6. To restrict the call view template to display open service calls for a specific branch, type the appropriate branch in Branch ID.
   - For example, type AKRON.
   - If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches in Branch Maintenance (SD.001.00) displays.
7. Verify that the All check box to the right of Technician is selected.
   - Choosing the All check box to the right of Technician allows users to view all of the open
     service calls for all technicians simultaneously.
   - All to the right of Technician is selected by default when creating new call view templates in
     Dispatch - View Maintenance (SD.004.00).

8. Click Save on the toolbar.
9. Click Close on the toolbar.
Viewing All Open Service Calls for A Specific Branch, Dispatch (SD.201.00)

To view all service calls for a specific branch:

1. Choose Module | Service Dispatch | Dispatch from the menu. Dispatch (SD.201.00) displays.

2. Type the ID of the call view template denoting all open service calls for a specific branch in Queue ID.
   - For example, type AKRON.
   - If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates in Dispatch - View Maintenance (SD.004.00) displays.

3. Type a range of dates to restrict the view of service calls displayed in Dispatch (SD.201.00) using From and To.
   - From defaults to seven days prior to the current date.
   - To defaults to the current date.
   - All open service calls for the specific branch with a promised date between the specified date range displays.

   **Note:** Customer service representatives typically view service calls for a single day.

4. Click Query Now to display all open service calls for the specified branch with a starting and ending date range specified in From and To.
   - All open service calls for the specified branch with a promised date between the specified date range displays.

5. Click Close on the toolbar.
Viewing All Open Service Calls for a Specific Technician

Creating a Call View Template for a Specific Technician

To create a call view template for a specific technician:

1. Choose Module | Service Dispatch | Dispatch - View Maintenance from the menu. Dispatch - View Maintenance (SD.004.00) displays.

   ![Dispatch - View Maintenance (SD.004.00)](image)

2. Type a call view template identifier indicating that all open service calls for a specific technician display in Dispatch (SD.201.00) or Graphical Dispatch Board (SD.900.00) in Call View.
   - For example, type DSMITH in Call View.

3. Type a call view template description indicating that all open service calls for a specific technician display in Dispatch (SD.201.00) or Graphical Dispatch Board (SD.900.00) in Description.
   - For example, type Don Smith in Description.

4. Verify that the check boxes to the left of Premium, High, Medium and Low in the Priority frame are selected.
   - Premium, High, Medium, and Low Priority are selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

5. Verify that the All check box to the right of Branch ID is selected.
   - Choosing the All check box to the right of the Branch ID allows users to view open service calls for every branch simultaneously.
   - All to the right of the Branch ID is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

6. Clear the All check box to the right of Technician.
   - The All check box to the right of Technician is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

7. To restrict the call view template to display open service calls for a specific technician, type the appropriate ID of the technician in Technician.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
   - For example, type SMITH00.

8. Click Save on the toolbar.

9. Click Close on the toolbar.
Viewing a Technician’s Open Service Calls, Dispatch (SD.201.00)

To view all service calls for a specific technician:

1. Choose **Module | Service Dispatch | Dispatch** from the menu. 
   *Dispatch* (SD.201.00) displays.

![Dispatch (SD.201.00)](image)

2. Type the ID of the call view template denoting all open service calls for a specific technician in **Queue ID**.
   - For example, type DSMITH.
   - If the call view template ID is unknown, press **F3** or double-click the right mouse button. A list of all call view templates in *Dispatch - View Maintenance* (SD.004.00) displays.

3. Type a range of dates to restrict the view of service calls displayed on *Dispatch* (SD.201.00) using **From** and **To**.
   - **From** defaults to seven days prior to the current date.
   - **To** defaults to the current date.
   - All open service calls with a promised date between the specified date range displays.

   **Note:** Customer service representatives typically view service calls for a single day.

4. Click **Query Now** to display all open service calls for the technician with a starting and ending date range specified in **From** and **To**.
   - All open service calls for the technician with a promised date between the specified date range displays.

5. Click **Close** on the toolbar.
Viewing a Technician’s Open Service Calls, Graphical Dispatch Board (SD.900.00)

To view open service calls for a technician on the Graphical Dispatch Board (SD.900.00):

1. In the navigation pane of the Microsoft Dynamics SL window, click Field Service.
2. In the Service Dispatch application pane under Inquiries, click Graphical Dispatch Board. The Graphical Dispatch Board (SD.900.00), Options tab appears.
3. (Optional) Enter the appropriate queue identification number in Queue ID.
4. Click the **Dispatch Board** tab. The **Dispatch Board** tab appears.

![Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View](image)

5. Enter the technician identification number in **Technician**.

6. (Optional) Clear the **Include Queue Filters** check box.

   **Note:**
   - The **Include Queue Filters** check box does not affect service call information that appears in the schedule pane if you click the **All** tab or the class tab for a specific employee. It also does not affect information that appears on the tabs of the service call details pane.
   - The **Include Queue Filters** check box does affect service call information that appears in the schedule pane and on the tabs of the service call details pane if you click the **Technician** tab.
   - If you clear the **Include Queue Filters** check box and then click the **Technician** tab, open service calls for the technician whose ID you specified in **Technician** appear in the schedule pane and on the tabs of the service call details pane. If you entered filter criteria for a queue on the **Options** tab, it is disregarded.
   - If you define filter criteria for the queue on the **Options** tab, and then on the **Dispatch Board** tab, select **Include Queue Filters** check box and click the **Technician** tab, open service calls for the technician that meet the selection criteria you specified appear in the schedule pane and on the tabs of the service call details pane.

7. Click **Refresh**. The **Technician** tab appears as the last item in the technician class tabs.
8. Click the Technician tab.

**Note:**

- All service calls that are not assigned to a technician appear on the Unassigned tab of the service call details pane. The technician filter does not affect the information that is available on the tab.

- Service call information appears on the schedule pane and on the tabs of the service call details pane (except for the Unassigned tab) based on the technician filter and the status of the Include Queue Filters check box. Only return to the Options tab if you need to change a queue or select new settings for the current queue. Once you return to the Options tab, the technician settings on the Dispatch Board tab are cleared. To view a new technician, you must then repeat steps 5 through 8 above.
Viewing All Open Service Calls for a Call Type

Creating a Call View Template for a Call Type

To create a call template for a call type:

1. Choose **Module | Service Dispatch | Dispatch - View Maintenance** from the menu.

   *Dispatch - View Maintenance (SD.004.00)* displays.

2. Type a call view template identifier indicating that all open service calls for a specific call type display in **Dispatch (SD.201.00)** or **Graphical Dispatch Board (SD.900.00)** in **Call View**.
   - For example, type COMMNEW in **Call View**. COMMNEW represents a Commercial New installation call type.

3. Type a call view template description that identifies that all open service calls for a specific call type display in **Dispatch (SD.201.00)** or **Graphical Dispatch Board (SD.900.00)** in **Description**.
   - For example, type Commercial New Installation in **Description**.

4. Verify that the check boxes to the left of **Premium**, **High**, **Medium** and **Low** in the **Priority** frame are selected.
   - **Premium**, **High**, **Medium**, and **Low Priority** are selected by default when creating new call view templates in **Dispatch - View Maintenance (SD.004.00)**.

5. Verify that the **All** check box to the right of **Branch ID** is selected.
   - Choosing **All** to the right of **Branch ID** allows users to view all open service calls for every branch simultaneously.
   - The **All** check box to the right of **Branch ID** is selected by default when creating new call view templates in **Dispatch - View Maintenance (SD.004.00)**.

6. Verify that the **All** check box to the right of **Technician** is selected.
   - Choosing **All** to the right of **Technician** allows users to view all of the open service calls for all technicians simultaneously.
   - The **All** check box to the right of **Technician** is selected by default when creating new call view templates in **Dispatch - View Maintenance (SD.004.00)**.
7. Click **Call Type**. *Call Type (SD.004.05)* displays.

8. To restrict the call view template to display open service calls for a specific call type, type the appropriate ID of the call type in **Call Type**.
   - If the call type ID is unknown, press **F3** or double-click the right mouse button. A list of all call types in *Call Type Maintenance (SD.003.00)* displays.
   - For example, type COMMNEW in **Call Type**. COMMNEW represents a Commercial New installation call type.
   
   **Note:** A call view queue can be restricted to multiple call types.

9. Click **OK**.
10. Click **Save** on the toolbar.
11. Click **Close** on the toolbar.
Viewing All Open Service Calls for a Specific Call Type, Dispatch (SD.201.00)

To view service calls for a specific call type:

1. Choose Module | Service Dispatch | Dispatch from the menu. Dispatch (SD.201.00) displays.

2. Type the identifier of the call view template denoting all open service calls for a specific call type in Queue ID.
   - For example, type COMMNEW in Queue ID. COMMNEW represents a Commercial New installation call type.
   - If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates set up in Dispatch - View Maintenance (SD.004.00) displays.

3. Type a range of dates to restrict the view of service calls displayed on Dispatch (SD.201.00) using From and To.
   - From defaults to seven days prior to the current date.
   - To defaults to the current date.
   - All open service calls with a specific call type and a promised date between the specified date range display.

   **Note:** Customer service representatives typically view service calls for a single day.

4. Click Query Now to display all open service calls for the specific call type with the starting and ending date range specified in From and To.
   - All open service calls with a promised date between the specified date range display.

   **Note:** Customer service representatives typically view service calls for a single day.

5. Click Close on the toolbar.
Viewing All Open Service Calls for a Call Status

Creating a Call View Template for a Call Status

To create a call view template for a specific call status:

1. Choose Module | Service Dispatch | Dispatch - View Maintenance from the menu. Dispatch - View Maintenance (SD.004.00) displays.

![Dispatch - View Maintenance (SD.004.00)](image)

2. Type a call view template identifier indicating that all open service calls for a specific call status display in Dispatch (SD.201.00) or Graphical Dispatch Board (SD.900.00) in Call View.
   - For example, type ASSIGNED in Call View.

3. Type a call view template description identifying that all open service calls for a specific call status display in Dispatch (SD.201.00) or Graphical Dispatch Board (SD.900.00) in Description.
   - For example, type Assigned Service Calls in Description.

4. Verify that the check boxes to the left of Premium, High, Medium and Low in the Priority frame are selected.
   - Premium, High, Medium, and Low Priority are selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

5. Verify that the All check box to the right of Branch ID is selected.
   - Choosing All to the right of Branch ID allows users to view all open service calls for every branch simultaneously.
   - The All check box to the right of Branch ID is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).

6. Verify that the All check box to the right of Technician is selected.
   - Choosing All to the right of Technician allows users to view all open service calls for all technicians simultaneously.
   - The All check box to the right of Technician is selected by default when creating new call view templates in Dispatch - View Maintenance (SD.004.00).
7. Click **Call Status**. Call Status (SD.004.06) displays.

![Call Status (SD.004.06)](image)

**Figure 76: Call Status (SD.004.06)**

8. To restrict the call view template to display open service calls for a specific call status, type the appropriate ID of the call status in **Call Status**.
   - If the call status ID is unknown, press **F3** or double-click the right mouse button. A list of all call statuses in **Call Status Maintenance** (SD.002.00) of Service Dispatch displays.
   - For example, type ASSIGNED.

   **Note:** A call queue view can be restricted to multiple call statuses.

9. Click **OK**.
10. Click **Save** on the toolbar.
11. Click **Close** on the toolbar.
Viewing All Open Service Calls for a Specific Call Status, Dispatch (SD.201.00)

To view service calls for a specific call status:

1. Choose **Module | Service Dispatch | Dispatch** from the menu. 
   *Dispatch (SD.201.00)* displays.

2. Type the ID of the call view template denoting the specific call type in **Queue ID**.
   - For example, type OPEN.
   - If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates set up in *Dispatch - View Maintenance (SD.004.00)* displays.

3. Type a range of dates to restrict the view of service calls displayed in *Dispatch (SD.201.00)* using **From** and **To**.
   - **From** defaults to seven days prior to the current date.
   - **To** defaults to the current date.
   - All open service calls with a promised date between the specified date range display.
   
   **Note:** Customer service representatives typically view service calls for a single day.

4. Click **Query Now** to display all open service calls with a specific call type and the starting and ending date range specified in **From** and **To**.
   - All open service calls with the specific call type and a promised date between the specified date range display.

5. Click **Close** on the toolbar.
Viewing All Open Service Calls for a Geographic Zone

Creating a Call View Template for a Geographic Zone

To create a call view template for a specific geographic zone:

1. Choose Module | Service Dispatch | Dispatch - View Maintenance from the menu.
   
   *Dispatch - View Maintenance (SD.004.00)* displays.

2. Type a call view template identifier indicating that service calls for a specific geographic zone display in *Dispatch* (SD.201.00) or Graphical Dispatch Board (SD.900.00) in Call View.
   
   - For example, type 02 in Call View. 02 represents the South Akron Geographic Zone.

3. Type a call view template description indicating that service calls for a specific geographic zone display in *Dispatch* (SD.201.00) or Graphical Dispatch Board (SD.900.00) in Description.
   
   - For example, type South Akron Geographic Zone in Description.

4. Verify that the check boxes to the left of Premium, High, Medium and Low in the Priority frame are selected.
   
   - Premium, High, Medium and Low Priority default to selected when creating new call view templates in *Dispatch - View Maintenance* (SD.004.00).

5. Verify that the All check box to the right of Branch ID is selected.
   
   - Choosing All to the right of Branch ID allows users to view all open service calls for every branch simultaneously.
   - The All check box to the right of Branch ID defaults to selected when creating new call view templates in *Dispatch - View Maintenance* (SD.004.00).

6. Verify that the All check box to the right of Technician is selected.
   
   - Choosing All to the right of Technician allows users to view service calls for every technician simultaneously.
   - The All check box to the right of Technician defaults to selected when creating new call view templates in *Dispatch - View Maintenance* (SD.004.00).
7. Click **Geographic**. Geography (SD.004.01) displays.

![Figure 79: Geography (SD.004.01)](image)

8. To restrict the call view template to display open service calls for a specific geographic zone, type the appropriate ID of the geographic zone in **Geographic ID**.

   - If the geographic zone ID is unknown, press F3 or double-click the right mouse button. A list of all call status set up in **Geographic Zone Maintenance** (SD.009.00) of Service Dispatch displays.
   - For example, type 02. 02 represents the South Akron Geographic Zone.

9. Click **OK**.

10. Click **Save** on the toolbar.

11. Click **Close** on the toolbar.
Viewing Open Service Calls for a Specific Geographic Zone, Dispatch (SD.201.00)

To create a call view template for a specific geographic zone:

1. Choose Module | Service Dispatch | Dispatch from the menu. Dispatch (SD.201.00) displays.

2. Type the identifier of the call view template denoting service calls for a specific geographic zone in Queue ID.
   - For example, type 02. 02 represents the South Akron Geographic Zone.
   - If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates set up in Dispatch - View Maintenance (SD.004.00) displays.

3. Type a range of dates to restrict the view of service calls displayed on Dispatch (SD.201.00) using From and To.
   - From defaults to seven days prior to the current date.
   - To defaults to the current date.
   - All open service calls associated with the geographic zone and a promised date between the specified date range display.

   Note: Customer service representatives typically view service calls for a single day.

4. Click Query Now to display service calls associated with the geographic zone with a starting and ending date range specified in From and To.
   - All service calls associated with the geographic zone and a promised date between the specified date range display.

5. Click Close on the toolbar.

Figure 80: Dispatch (SD.201.00)
Viewing Open Service Calls for a Specific Geographic Zone, Graphical Dispatch Board (SD.900.00)

To create a call view template for a specific geographic zone:

1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Options tab of Graphical Dispatch Board (SD.900.00) appears.

2. Type the identifier of the Call Queue View template denoting all open service calls for the company in Queue ID. If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates set up in Dispatch - View Maintenance (SD.004.00) appears. The General area of the Options tab appears. Review the contents to ensure all priority check boxes are selected, the All Branch ID check box is selected, and only the Geographic Zone you are interested in is listed in the grid.

3. Click the Dispatch Board tab. The Dispatch Board tab appears, showing only service calls associated with the specified geographic zone.

Warning: Use of this filtering option can cause service calls that are assigned to a technician to not be displayed when a technician works in multiple geographic zones. Caution must be taken to ensure that conflicting service call assignments are not made when using this filtering option.
Changing Sort Order in Dispatch (SD.201.00)

Dispatch Sort Order (SD.004.02) allows service calls to be sorted in a manner most efficient for an organization in Dispatch (SD.201.00). For example, service calls can be displayed in ascending order by Service Call ID in Dispatch (SD.201.00).

**Note:** The Graphical Dispatch Board (SD.900.00) is not affected by changing the sort order in Dispatch - View Maintenance (SD.004.00).

**To change the dispatch order:**

1. Choose Module | Service Dispatch | Dispatch - View Maintenance from the menu. Dispatch - View Maintenance (SD.004.00) displays.

   ![Dispatch - View Maintenance](image)

   **Figure 81: Dispatch - View Maintenance (SD.004.00)**

2. Type a call view template identifier with which to associate the new sort order in Call View.

3. Click Sort Order. Dispatch Sort Order (SD.004.02) displays.

   ![Dispatch Sort Order](image)

   **Figure 82: Dispatch Sort Order (SD.004.02)**

4. Select the values to base the sort for open service calls in Dispatch (SD.201.00) from Available Fields and click Add.
   - Multiple sorts can exist for a call view template.

5. Choose the direction of the sort in Sort Direction.
   - Ascending
   - Descending

6. Click OK. Dispatch - View Maintenance (SD.004.00) displays.

7. Click Save on the toolbar.

8. Click Close on the toolbar.
Search Problem Codes of Open Service Calls in Graphical Dispatch Board (SD.900.00)

Service Call Search (SD.900.02) allows you to search problem codes of open service calls in the Graphical Dispatch Board (SD.900.00).

To search problem codes of open service calls:

1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Graphical Dispatch Board (SD.900.00), Options tab appears.

2. (Optional) Enter the appropriate queue identification number in Queue ID.
3. Click the **Dispatch Board** tab. The **Dispatch Board** tab appears.

![Dispatch Board Tab](image)

*Figure 84: Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View*
4. Click **Search**. Service Call Search (SD.900.02) appears.

![Service Call Search (SD.900.02)](image)

*Figure 85: Service Call Search (SD.900.02) – Accessed from the Graphical Dispatch Board (SD.900.00), Dispatch Board tab*

5. (Optional) Select any combination of **Customer**, **Technician**, **Contract**, or **Priority**. If selection criteria is not entered, problem codes for all open service calls will display in the grid area when **Search** is clicked.

6. Click **Search**. Problem codes for open service calls that match the selection criteria display in the grid area.

7. Click the line in the grid area that contains the problem code you are looking for. The **Graphical Dispatch Board** (SD.900.00) opens with the problem code displayed in the schedule pane and in the service call details pane.
Assigning a Technician to a Problem Code from Graphical Dispatch Board (SD.900.00)

Graphical Dispatch - Assign Technician (SD.901.00) allows you to:

- Assign technicians to problem codes
- Indicate both when work will begin and the duration of the work on a problem code
- Change the status of a problem code.

To assign a technician to a problem code:

1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu.
   The Options tab of Graphical Dispatch Board (SD.900.00) appears.
2. Enter the desired Queue ID.
3. Select the Dispatch Board tab.
4. Select the Unassigned tab.
5. Click in the Service Call ID column on the call you wish to make an assignment on.
6. Click the ellipsis (…) button to open Graphical Dispatch - Assign Technician (SD.901.00).
7. Click in Technician ID for the problem code you wish to make an assignment on and type in the technician ID you want to assign to the problem code.
8. If the technician ID is unknown, press F3 or double-click the right mouse button to access a list of active technicians.
9. After selecting a technician ID, the status automatically changes to Assigned and the mouse pointer moves to the **Status** column. If you wish to change the status, select the desired status from the list.

10. Press **Tab** to move to **Start Date** and enter the date when work on this problem code is expected to begin.

11. Press **Tab** to move to **Start Time** and enter the time when work on this problem code is expected to begin. Note that time must be typed in 24-hour, or military time, format. For example, 1:00PM is entered as 13:00.

12. Press **Tab** to move to **Travel Time** and enter travel time, if desired. Note that **Travel Time** may already be populated with a default value. The default is set in **Graphical Dispatch Setup Maintenance** (SD.902.00).

13. Press **Tab** to move to **Duration** and enter the total time, including travel time that the task is expected to take to complete. Note that **Duration** may already be populated with a default value. The default is set in **Problem Code Maintenance** (SD.008.00).

14. **End Date** and **End Time** are calculated by the system based on the values entered in steps 7 – 10 above.

15. Review the entries in **Equip ID**, **PM Code**, and **Contract ID** and adjust as needed.
Adding a New Problem Code to a Service Call from Graphical Dispatch Board (SD.900.00)

Graphical Dispatch - Assign Technician (SD.901.00) allows you to add problem codes to a service call directly from Graphical Dispatch Board (SD.900.00) without opening Service Call Entry (SD.200.00).

To add a new problem to a service call:
1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Options tab of Graphical Dispatch Board (SD.900.00) appears.
2. Enter the desired queue ID.
3. Select the Dispatch Board tab.
4. Select the service call you want to add a new problem code to and open Graphical Dispatch - Assign Technician (SD.901.00).
   - To select the service call from the schedule pane, double-click the task bar to open Graphical Dispatch - Assign Technician (SD.901.00).
   - To select the service call from the service call details pane, click the service call ID in the Service Call ID column and press the ellipsis (...) button to open Graphical Dispatch - Assign Technician (SD.901.00).
5. Click in the Problem ID column of Graphical Dispatch - Assign Technician (SD.901.00) on the first empty row.
6. Type the problem ID.
7. If the ID is unknown, press F3 or double-click the right mouse button to access a list of problem code IDs.

8. If you do not wish to assign a technician at this time or change any of the values in the other columns, you can close the screen by clicking OK.

9. Press Tab to move to Technician ID and assign a technician, if desired.

10. Type in the technician ID you want to assign to the problem code. If the ID is unknown, press F3 or double-click the right mouse button to access a list of active technicians.

11. After selecting the technician ID, the status automatically changes to Assigned. The mouse pointer moves to the Status column. If you wish to change the status, press the arrow and select a new status from the drop-down list.

12. Press Tab to move to Start Date and enter the date when work on this problem code is expected to begin.

13. Press Tab to move to Start Time and enter the time when work on this problem code is expected to begin. Note that time must be entered in 24-hour, or military time, format. For example, 1:00PM is entered as 13:00.

14. Press Tab to move to Travel Time and enter travel time if desired. Note that Travel Time may already be populated with a default value. The default is set in Graphical Dispatch Setup Maintenance (SD.902.00).

15. Press Tab to move to Duration and enter the total time, including travel time that the task is expected to take to complete. Note that Duration may already be populated with a default value. The default is set in Problem Code Maintenance (SD.008.00).

16. End Date and End Time are calculated by the system based on the values entered in steps 9 – 12 above.

17. Review the entries in Equip ID, PM Code, and Contract ID and adjust as needed.
Special Pricing Revisions

The following section explains how to use special pricing revisions in Service Series.

**Create Special Pricing Revisions (SD.042.00) (Optional)**

*Site - Special Pricing Maintenance* (SD.037.00) lets users create revisions for specific inventory item special pricing for customer sites. Use this method if you have only a few revisions to create. However, if you have many revisions to create, you can use *Site - Special Pricing Revisions* (SD.042.00) to create revisions on a larger scale, by using various selection criteria including customer site groups.

For more information about creating a few revisions, see “Define Special Pricing (SD.037.00) (Optional)” on page 111.

To define many revisions for special pricing, follow these steps:

1. Select **Field Service | Service Dispatch | Site – Special Pricing Revisions**.

![Figure 88: Site - Special Pricing Revisions (SD.042.00)](image)

2. Select **Amount or Discount % in Pricing Option**.

   ![Figure 88: Site - Special Pricing Revisions (SD.042.00)](image)
3. In the **Customer Site ID** area, select one of the following:

- **All Customer Site IDs** – select this option if you want to create revised price/disc% for all customer site IDs. On the right side, **Customer Site Group ID**, **Customer ID**, and **Customer Site ID** are disabled.

- **Customer Site Group ID** – select this option if you want to create revised price/disc% for one or more customer site group IDs. On the right side, you can also decide to refine your selection by specifying values in **Customer Site Group ID**, **Customer ID**, and **Customer Site ID**. The default in these boxes is an asterisk (*) that represents all values. You can also use the asterisk(*) as a wildcard or you can use the question mark (?) as a mask. For more information about this functionality, see “Site – Special Pricing Revisions (SD.042.00)” on page 441.

  **Note:** This option is disabled if you have not yet created and customer site group IDs. To create a customer site group ID, see “Define Customer Site Groups (SD.041.00)” on page 110.

- **Customer Site ID** – select this option if you want to create revised price/disc% for one or more customer site IDs. On the right side, you can also decide to refine your selection by specifying values in **Customer ID** and **Customer Site ID**. Customer Site Group ID is disabled. The default in these boxes is an asterisk (*) that represents all values. You can also use the asterisk(*) as a wildcard or you can use the question mark (?) as a mask. For more information about this functionality, see “Site – Special Pricing Revisions (SD.042.00)” on page 441.

4. In the **Additional Selection Criteria** area, optionally specify any other selection criteria that you want to use.

- **Inventory ID** – select this option if you want to refine the search results by the inventory ID. An asterisk (*) functions as a placeholder and a question mark (?) functions as a mask.

- **Current Price** – select this option if you want to refine the search results by a specific price. This box is enabled if the **Pricing Option** is **Amount**.

- **Current Percent** – select this option if you want to refine the search results by a specific percent. This box is enabled if the **Pricing Option** is **Discount %**.

- **Start Date** – select this option if you want to refine the search results by the start date.

- **End Date** – select this option if you want to refine the search results by the end date.

- **Update price plans with revised price or percent not equal to zero** – click to select this check box if you want to include only special pricing plans that contain nonzero values and exclude any special pricing plans with a revised price/disc % equal to zero.

5. In the **Change to Revised Price or Discount %** area, specify one new price/disc% and dates.

- **New Revised Price** – specify the new revised price that will be placed into **Revised Price/Disc %** in Site – Special Pricing Maintenance (SD.037.00). This value will replace the existing value. This box is enabled if the **Pricing Option** is **Amount**.

- **Revised Price Flat Increase/Decrease** – specify the flat amount by which you want to increase (type a positive number) or decrease (type a negative number) the existing current price. This box is enabled if the **Pricing Option** is **Amount**. For example, if the current price is $10.00, and you type $-1.50 in this box, the new revised price will be $8.50.

  **Note:** The new revised price cannot be less than zero. If the calculation results in the new revised price being less than zero, the process will set the price to exactly zero.

- **Revised Price % Increase/Decrease** – specify the percentage by which you want to increase (type a positive number) or decrease (type a negative number) the existing current price. This box is enabled if the **Pricing Option** is **Amount**. For example, if the current price is $10.00, and you type 1.5 in this box, the new revised price will be $10.15.
Note: The new revised price cannot be less than zero. If the calculation results in the new revised price being less than zero, the process will set the price to exactly zero.

- **New Revised Discount %** - specify the new revised discount % that will be placed into Revised Price/Disc % in **Site – Special Pricing Maintenance** (SD.037.00). This value will replace the existing value. This box is enabled if the **Pricing Option** is Discount %. For example, if the current discount % is 5.00%, and you type 2.25% in this box, the new revised discount % will be 7.75%.

- **Revised Discount % Flat Increase/Decrease** - specify the percentage by which you want to increase (type a positive number) or decrease (type a negative number) the existing current discount %. This box is enabled if the **Pricing Option** is Discount %. For example, if the current discount % is 5.00%, and you type 2.00% in this box, the new revised discount % will be 5.10%.

- **New Start Date** – specify the start date that you want to use to replace the existing start date.
- **New End Date** – specify the end date that you want to use to replace the existing end date.

6. (Optional) Click **View Pending Price/Disc% Revisions** to review all special prices that match the criteria in the screen (except **Update price plans with revised price or percent not equal to zero**) in **View Pending Special Pricing Revisions** (SD.042.01). Close the subscreen when you are finished.

7. Click **Begin Processing** to update the Revised Price/Disc% in **Site – Special Pricing Maintenance** (SD.041.00).

8. When the process is complete, you are ready to move the revised price/disc% to the current price/disc%, if you have no other revised pricing changes that you must make. For more information, see “Update Special Pricing with Revisions (SD.043.00) (Optional)” on page 186.
Update Special Pricing with Revisions (SD.043.00) (Optional)

Update Special Pricing with Revisions (SD.043.00) lets you update the price/disc% with the revised price/disc% value. Additionally, you can update the start date and end date from the revised start date and revised end date. When the process is complete, it zeros the revised price/disc% and clears the revised start date and revised end date.

You can decide to update all special prices that contain nonzero revised price/disc% or you can decide to update a subset of those, based on customer site group ID, customer ID, customer site ID, and inventory ID.

To update special prices with the revised prices, follow these steps:

1. Select Field Service | Service Dispatch | Update Special Pricing with Revisions.

2. In Revise Special Pricing with Start Dates on or prior to, specify the date that you want to use to select the special prices to update. The default date is the current business date.

3. In Categories, select one of the following:
   - All Special Prices – select this option to update all special prices that have a revised price/disc%. All additional selection is disabled. This selection is the default.
   - Customer Site Group ID – select this option if you want to select a customer site group ID to narrow your selection. This option is disabled if you have not previously created a customer site group ID. The Customer Site Group ID, Customer ID, Customer Site ID, and Inventory ID text boxes are enabled. The defaults are asterisks (*) which represent all values. You can specify a value in one or more text box.
   - Customer ID – select this option if you want to select a customer ID to narrow your selection. The Customer ID and Inventory ID text boxes are enabled. The defaults are asterisks (*) which represent all values. You can specify a value in one or both text boxes.
• **Customer Site ID** – select this option if you want to select a customer site ID to narrow your selection. The **Customer Site Group ID** text box is disabled and all other text boxes are enabled. The default is an asterisk (*) which represents all values.

• **Inventory ID** - select this option if you want to select only an inventory ID to narrow your selection. The **Inventory ID** text box is enabled and all other text boxes are disabled. The default is an asterisk (*) which represents all values.

4. Depending on your choice in the **Categories** area, you may want to specify a value in one or more of the following to refine your selection: **Customer Site Group ID**, **Customer ID**, **Customer Site ID**, or **Inventory ID**. You can use an asterisk (*) wildcard, a question mark (?) placeholder, alphanumeric characters, or a combination of the three.

5. Click **Begin Processing** to update the **Price/Disc%** with the **Revised Price/Disc%**, **Start Date** with **Revised Start Date**, and **End Date** with **Revised End Date**. This process also clears the values from the selected **Revised Price/Disc%**, **Revised Start Date**, and **Revised End Date**.
Paging

The following section explains how to page a technician using Dispatch (SD.201.00) or Graphical Dispatch Board (SD.900.00).

Paging with Dispatch (SD.201.00)

Dispatch (SD.201.00) enables users to perform the functions related to viewing open service calls after the calls have been entered into Service Call Entry (SD.200.00). These functions include assigning technicians to perform the work and sending alphanumeric pages to these technicians in the field. Service technicians can be paged through Dispatch - Service Call Page (SD.024.00) in Dispatch (SD.201.00).

After service calls have been entered and released in Service Call Entry (SD.200.00), technicians can be assigned to perform the work and alphanumeric pages can be sent to these technicians in the field through Dispatch - Service Call Page (SD.024.00).

To page a technician:

1. Open Dispatch (SD.201.00) by choosing Module | Service Dispatch | Dispatch Board from the menu.
   Dispatch (SD.201.00) displays.
2. Type a call view template in Queue ID.
   • If the call view template ID is unknown, press F3 or double-click the right mouse button. A list of all call view templates set up in Dispatch - View Maintenance (SD.004.00) displays.
   Note: The call view template defaults to the Queue ID associated with the current user set up in User Configuration (SD.000.01).
3. Type a range of dates to restrict the view of service calls displayed on Dispatch (SD.201.00) using From and To.
   • From defaults to seven days prior to the current date.
   • To defaults to the current date.
   Note: Customer service representatives typically view service calls for a single day.
4. Click Query Now to display all service calls for the starting and ending date range specified in From and To.
   • All service calls with a promised date between the specified date range display.
5. Click any field of the service call record to activate Page.
6. Click **Page**. **Dispatch - Service Call Page** (SD.024.00) displays.

![Dispatch - Service Call Page (SD.024.00)](image)

**Figure 90: Dispatch - Service Call Page (SD.024.00)**

7. Type a different **Service Call ID** if the selected service call is not correct.
   - **Service Call ID** displays if selected in **Dispatch** (SD.201.00).
   - If the service call ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in **Service Call Entry** (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click **OK**, or double-click the ID.

8. Type the ID of the technician who will perform the work on the service call and receive the alphanumeric page in **Technician ID**.
   - If the technician must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in **Employee Maintenance** (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing employee.
   - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new employees to the system.
   - If the technician has already been assigned to the call, the technician ID defaults.
   - If a pager number is attached to the technician in **Employee Maintenance** (SD.007.00), then the pager number defaults in **Number**.
   - To assign a technician to a service call without paging the technician, type the technician ID and click **Assign To Call**.

**Note:** **Assign To Call** updates the service calls with any changes made in **Dispatch - Service Call Page** (SD.024.00) without paging the technician. For example, changing the Call Status of the service call or assigning a technician to perform the work of the service call.
9. Type the call status indicating that a technician has been paged for the service call in **Call Status ID**.
   - If the call status ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.
   - For example, type ASSIGNED.
     - To select a call status ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Call Status PV List** accesses Call Status Maintenance (SD.002.00), enabling you to modify information for an existing call status.
     - Clicking **Insert** on the **Call Status PV List** accesses Call Status Maintenance (SD.002.00), enabling you to add new call statuses to the system.
   - The **Call Status** is used to update the status of the service call at the same time a user assigns the technician to be paged.

   **Note:** Assign To Call updates the service calls with any changes made in Dispatch - Service Call Page (SD.024.00) without paging the technician. For example, changing the Call Status of the service call or assigning a technician to perform the work of the service call.

10. Type a paging template in **Template ID**.
    - If the template must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all paging templates set up in Pager Maintenance (SD.031.00) displays.
      - To select a template ID, highlight the ID and click OK, or double-click the ID.
      - Clicking **Edit** on the **Pager Template PV List** accesses Pager Template (SD.031.00), enabling you to modify information for an existing pager template.
      - Clicking **Insert** on the **Pager Template PV List** accesses Pager Template (SD.031.00), enabling you to add new pager templates to the system.
    - When selecting a template ID, an alphanumeric message displays in the message box depending on the criteria chosen in Pager Template (SD.031.00).

    **Note:** Template ID defaults from Template ID in Employee Maintenance (SD.007.00).

11. Type a pager number in **Number**.
    - If a pager number is attached to the technician in Employee Maintenance (SD.007.00), then the pager number defaults.

12. Type the message being sent to the technician in the message box.

    **Note:** While Template ID is required, users can edit or delete the default message and type a new message in the message box.

13. Check **Auto-Retry** to continue to send the page if the initial try failed.

14. Choose **Page** to initiate the page process.
    - The alphanumeric text information is sent to a technician based on the template ID selected.

    **Note:** During the page process, the system creates an ASCII file. Wireless Office checks periodically for a file and sends them whenever a file is detected.

15. Click **OK** to close the Page Sent Notification message, which indicates that the page was transmitted to the paging server.

16. Click **OK** to close the Service Call Updated, a message that confirms changes you made in the service call.
17. Click **Close** on the toolbar to close *Dispatch - Service Call Page* (SD.024.00).

*Dispatch* (SD.201.00) displays.

**-OR-**

Click **Assign to Call** to automatically save any changes made to the service call in *Dispatch - Service Call Page* (SD.024.00).

**Note:** **Assign To Call** updates the service calls with any changes made in *Dispatch - Service Call Page* (SD.024.00) without paging the technician. For example, changing the **Call Status** of the service call or assigning a technician to perform the work of the service call.

18. Click **Close** on the toolbar.
Paging with Graphical Dispatch Board (SD.900.00)

Technicians Page (SD.903.00) allows technicians to be paged directly from the Graphical Dispatch Board (SD.900.00).

To page a technician:

1. Choose Module | Service Dispatch | Technicians Page from the menu. Technicians Page (SD.903.00) appears.

   Note: Technicians Page (SD.903.00) can also be accessed by right-clicking on either a problem code task bar in the schedule pane or a service call in the service call details pane, and then selecting Page from the task bar menu.

2. Type a different Service Call ID if the service call displayed on the screen is incorrect. (The service call ID appears if Technicians Page (SD.903.00) was accessed from Graphical Dispatch Board (SD.900.00).) If the service call must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in Service Call Entry (SD.200.00) appears. To select a service call ID, highlight the ID and click OK, or double-click the ID.

3. Type the call status that indicates a technician has been assigned to the service call in Call Status ID. If the call status must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) appears. To select a call status ID, highlight the ID and click OK, or double-click the ID.
Note: Clicking Edit on the Call Status PV List accesses Call Status Maintenance (SD.002.00), enabling you to modify information for an existing call status. Clicking Insert on the Call Status PV List accesses Call Status Maintenance (SD.002.00), enabling you to add new call statuses to the system. Call Status is used to update the status of the service call at the same time that a user assigns the technician to be paged. The status of the problem code is not changed by the page. Typically, a call status of Assigned is chosen.

4. All technicians currently associated with the service call will be displayed in the grid if the screen was accessed from Graphical Dispatch Board (SD.900.00). Select the check box to the left of Technician to indicate which of the technicians should be paged with the service call information. Multiple technicians can be paged at the same time.

5. If the technician you wish to page is not listed in the grid, type the ID of the technician who will perform the work on the service call and receive the alphanumeric page in Technician ID. If the technician must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of technicians set up in Employee Maintenance (SD.007.00) appears. To select a technician ID, highlight the ID and click OK, or double-click the ID.

Note: Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing employee. Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new employees to the system.

6. If a pager number is attached to the technician in Employee Maintenance (SD.007.00), then the pager number will default in Number.

7. Type a paging template in Template ID. If the template ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all paging templates set up in Pager Maintenance (SD.031.00) appears. To select a template ID, highlight the ID and click OK, or double-click the ID. When selecting a template ID, an alphanumeric message appears in the message box depending on the criteria that was chosen in Pager Template (SD.031.00).

Note: Clicking Edit on the Pager Template PV List accesses Pager Template (SD.031.00), enabling you to modify information for an existing pager template. Clicking Insert on the Pager Template PV List accesses Pager Template (SD.031.00), enabling you to add new pager templates to the system. While Template ID is required, you can erase the default message and type a new message in the message box. The template ID defaults from the template assigned in Employee Maintenance (SD.007.00).

8. The pager number in Number defaults from Employee Maintenance (SD.007.00).

9. Select Auto-Retry to continue to send the page if the initial try fails.

10. Choose Page to initiate the page process. Page Sent Notification appears, advising that the page was transmitted to the paging server.

Note: The alphanumeric text information is sent to a technician based on the template ID selected.

11. Click OK to close Page Sent Notification. Service Call Updated appears, confirming changes you made in the service call.

12. Click OK to close Service Call Updated.

Note: If multiple technicians are being paged, the last technician in the list is the one assigned to the service call though the message will appear for each technician.

13. Click Close on the toolbar to close Technicians Page (SD.903.00). Graphical Dispatch Board (SD.900.00) appears if Technicians Page (SD.903.00) was accessed from Graphical Dispatch Board (SD.900.00).
Sending Email Messages to Customers and Technicians

The following topics explain how to send email messages to customers and technicians directly from the Graphical Dispatch Board (SD.900.00) with Outlook.

Sending Email Messages to Customers

Using Outlook, you can send email messages to customers to discuss service calls that appear on the Graphical Dispatch Board (SD.900.00). You can also send copies of customer-related email messages to technicians.

To send email messages to customers:
1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Graphical Dispatch Board (SD.900.00), Options tab appears.

![Figure 92: Graphical Dispatch Board (SD.900.00), Options tab]

2. (Optional) Enter the appropriate queue identification number in Queue ID.
3. Click the Dispatch Board tab. The Dispatch Board tab appears.

![Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View](image)

*Figure 93: Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View*

4. Rest the mouse pointer on a problem code task bar.

**Note:** A problem code task bar lists the service call identification number that is associated with a particular problem code.
5. Right-click to select the problem code task bar. The Problem Code Task Bar menu appears.

![Figure 94: Problem code task bar menu – Accessed from a problem code task bar on the Graphical Dispatch Board (SD.900.00), Dispatch Board tab](image)

**Note:** The **Invoice** menu option is not available if the ID of the company you are currently working in and the company ID of the service call you select are not the same.

6. Select **Send Customer E-mail**. Outlook opens and a new email message window appears. The following fields in the window are populated for you:
   - **To** contains the customer’s email address specified in **E-mail Address** on the **Address** tab of Accounts Receivable Customer Maintenance (08.260.00)
   - **Cc** contains the technician’s email address specified in **E-mail Address** in Employee Maintenance (SD.007.00) if **Customer E-mail Options** in Graphical Dispatch Setup Maintenance (SD.902.00) is set to **Cc Technician**
   - **Bcc** contains the technician’s email address specified in **E-mail Address** in Employee Maintenance (SD.007.00) if **Customer E-mail Options** in Graphical Dispatch Setup Maintenance (SD.902.00) is set to **Bcc Technician**
   - **Subject** contains **Service Call:** followed by the service call identification number associated with the problem code

7. Complete the details of the email message.

8. Click **Send** to transmit the message.
Sending Email Messages to Technicians

Using Outlook, you can send email messages to technicians to discuss service calls that appear on the Graphical Dispatch Board (SD.900.00). You can also send email messages that are not related to problem codes from the technician pane or technician status task bars that display on the schedule pane.

To send a problem service call-related email message to a technician:

1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Graphical Dispatch Board (SD.900.00), Options tab appears.

2. (Optional) Enter the appropriate queue identification number in Queue ID.
3. Click the **Dispatch Board** tab. The **Dispatch Board** tab appears.

![Figure 96: Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View](image)

4. Rest the mouse pointer on a problem code task bar.

   **Note:** A problem code task bar lists the service call identification number that is associated with a particular problem code.
5. Right-click to select the problem code task bar. The Problem Code Task Bar menu appears.

![Graphical Dispatch Board](image)

**Figure 97: Problem code task bar menu – Accessed from a problem code task bar on the Graphical Dispatch Board (SD.900.00), Dispatch Board tab**

**Note:** The Invoice menu option is not available if the ID of the company you are currently working in and the company ID of the service call you select are not the same.

6. Select **Send Technician E-mail**. Outlook opens and a new email message window appears. The following fields are populated for you:
   - **To** contains the technician’s email address specified in **E-mail Address** in Employee Maintenance (SD.007.00)
   - **Subject** contains Service Call: followed by the service call identification number

7. Complete the details of the email message.

8. Click **Send** to transmit the message.
To send a technician an email message that is not related to a service call:

1. Choose Module | Service Dispatch | Graphical Dispatch Board from the menu. The Graphical Dispatch Board (SD.900.00), **Options** tab appears.

![Graphical Dispatch Board (SD.900.00), Options tab](image)

2. (Optional) Enter the appropriate queue identification number in **Queue ID**.
3. Click the **Dispatch Board** tab. The **Dispatch Board** tab appears.

![Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View](image)

*Figure 99: Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View*

4. Rest the mouse pointer on a line in the technician pane that contains the technician’s identification number.
5. Right-click to select the technician. **Send Technician E-mail** appears.

![Figure 100: Technician menu – Accessed from Technician on the Graphical Dispatch Board (SD.900.00), Dispatch Board tab](image)

6. Click **Send Technician E-mail**. Outlook opens and a new email message window appears.

   **Note:** **To** is populated with the technician’s email address specified in **E-mail Address** in Employee Maintenance (SD.007.00).

7. Complete the details of the email message.
8. Click **Send** to transmit the message.
To send an email message to a technician from a technician status task bar:

1. Choose **Module | Service Dispatch | Graphical Dispatch Board** from the menu. The **Graphical Dispatch Board** (SD.900.00), **Options** tab appears.

2. (Optional) Enter the appropriate queue identification number in **Queue ID**.
3. Click the **Dispatch Board** tab. The **Dispatch Board** tab appears.

![Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View](image.png)

*Figure 102: Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Day View*

4. Rest the mouse pointer on a technician status task bar.

*Note:* The technician status task bar lists a technician’s employee identification number.
5. Right-click to select the technician status task bar. The Technician Status Task Bar menu appears.

![Figure 103: Technician status task bar menu – Accessed from a technician status task bar on the Graphical Dispatch Board (SD.900.00), Dispatch Board tab](image)

6. Select **Send Technician E-mail**. Outlook opens and a new email message window appears.

   **Note:** To is populated with the technician’s email address specified in **E-mail Address** in *Employee Maintenance* (SD.007.00).

7. Complete the details of the email message.
8. Click **Send** to transmit the message.
Printing Service Call Work Orders

Printing a Service Call Work Order from the Reports Menu

To print a service call work order:

1. Open Service Call Workorder (SD.625.00) by choosing Module | Service Dispatch | Reports | Service Call Workorder from the menu.

   Service Call Workorder (SD.625.00) displays.

2. Click the Select tab. The Select tab of Service Call Workorder (SD.625.00) displays.

3. Type smservcall.servicecallid in Field.

   - Press F3 or double-click the right mouse button to display a list of fields associated with the service call work order report that can be used for record criteria selections.

4. Select Equal in Operator.

   - Click the down-arrow to the right of Operator to display a list of possible operators for record criteria selections.

5. Enter a valid service call ID in Value.

6. Click Print.

   - Clicking Print sends the service call to a specified printer.
7. Click **Close** on the toolbar.

-OR-

Click **Print Preview**.

a) Note that clicking **Print Preview** prints the service call on the screen.

---

Figure 105: Service Call Workorder (SD.625.00) report

b) Click **Close** on the Crystal Report Writer toolbar.

c) Click **Close** on the toolbar.
Printing Service Call Work Orders from Service Call Entry (SD.200.00)

To print a service call work order:
1. Open Service Call Entry (SD.200.00) by choosing Module | Service Dispatch | Service Call Entry from the menu.
   Service Call Entry (SD.200.00) displays.
2. If the service call has been invoiced and completed, select Completed Calls.
3. Type the identifier of the service call to be printed in Service Call ID.
   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all completed service calls set up in Service Call Entry (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click OK, or double-click the ID.
4. Click Print.
5. Click Close on the toolbar.
Printing a Service Call Work Order from the Graphical Dispatch Board (SD.900.00)

To print a service call work order:

1. Choose **Module | Service Dispatch | Graphical Dispatch Board** from the menu.
   The **Options** tab of **Graphical Dispatch Board (SD.900.00)** appears.
2. Enter the desired queue ID.
3. Select the **Dispatch Board** tab.
4. Select the service call or problem code task bar you want to print the work order for.
5. Once the call is selected, right-click on the mouse and select **Print Service Call Workorder**.

*Note:* The **Invoice** menu option is not available if the ID of the company you are currently working in and the company ID of the service call you select are not the same.
Processing Independent of Call Completion

After service calls have been dispatched and technicians have performed some or all of the work on the job, labor and material used to complete the work can be entered into the system. *Invoice Entry* (SD.202.00) allows users to enter billing information for a service call or job while *Invoice - T & M Details* (SD.203.00) allows users to enter material and labor line item details for a service call or job.

Regardless of if line items are billable, labor and material can be entered and tracked for a service call or job. If the Payroll module is interfaced to Service Dispatch, *Generate Payroll Process* (SD.302.00) generates batches in *Time and Dollar* (02.020.00) for processing the labor *Work Hours* of technicians. *Generate Inventory* (SD.306.00) creates batches in *Issues* (10.020.00) for updating quantity and cost information for material inventory items used on a service call or job.

If the Purchasing module is interfaced to Service Dispatch, *Generate Inventory* (SD.306.00) can also be used to create purchase orders and purchase order receipts where a *Vendor ID* is populated on detail lines of *Invoice - T & M Details* (SD.203.00) or *Flat Rate Order - Modify Details* (SP.202.00).
Generate Payroll Process

Generate Payroll Process (SD.302.00) allows technician hours and hourly pay rate to integrate with the Payroll module. The Work Hours entered during Invoice - T & M Details (SD.203.00) along with the Employee ID, Earnings Type, Work Location, and Pay Rate are processed based on the Service Call ID and service date range.

The following data is required:

- Tran Date - From and Tran Date - To (Step 5)

To generate the payroll process:

1. Choose Module | Service Dispatch | Generate Payroll Process from the menu.
   Generate Payroll Process (SD.302.00) displays.

2. To run the Generate Payroll Process (SD.302.00) for all branches, verify that the check box to the left of All Branch is selected.

3. To restrict Generate Payroll Process (SD.302.00) to a specific branch, clear the check box to the left of All Branch and type the ID of the appropriate branch in Branch ID.
   - If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in Branch Maintenance (SD.001.00) displays.
     - To select a Branch ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new branches to the system.

4. To restrict Generate Payroll Process (SD.302.00) to a range of service calls, type the identifier of the first service call in Svc Call ID - From and type the identifier of the last service call in Svc Call ID - To.
   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in Service Call Entry (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Service Call Maintenance PV List accesses Service Call Entry (SD.200.00), enabling you to modify information for an existing service call.
     - Clicking Insert on the Service Call Maintenance PV List accesses Service Call Entry (SD.200.00), enabling you to add a new service call to the system.
5. To restrict Generate Payroll Process (SD.302.00) to a range of transaction dates, type the first date in **Tran Date - From** and type the last date in **Tran Date - To**.
   - All labor detail records with a **Service Date** in Invoice - T & M Details (SD.203.00) or Flat Rate Order - Modify Details (SP.202.00) between **Tran Date - From** and **Tran Date - To** will be included in the Time & Dollar (02.020.00) batch of Payroll.

   **Note:** **Tran Date - From** and **Tran Date - To** generally coincide with the payroll period dates of an organization.

6. Click **Begin Processing**. A batch is created in Time and Dollar (02.020.00) of the Payroll module.
7. When the payroll generation process is finished, click **OK** to close the Process Status message.
8. Click **Close** on the toolbar to close Generate Payroll Process (SD.302.00).
   - Clicking **Cancel** closes Generate Payroll Process (SD.302.00).
Generate Inventory

Generate Inventory (SD.306.00) allows users to generate an Issues (10.020.00) batch in the Inventory module for the quantity and costs of non-billable inventory items, create purchase orders in Purchase Orders (04.250.00) and purchase order receipts in Receipts/Invoice Entry (04.010.00) without completing service calls. In addition, Generate Inventory (SD.306.00) processes quantity and costs of non-billable inventory items.

**Note:** All fields default from information entered previously. If you choose to clear check boxes, you must type a value into the corresponding field.

To generate inventory:

1. Choose Module | Service Dispatch | Generate Inventory from the menu. Generate Inventory (SD.306.00) displays.

   ![Generate Inventory (SD.306.00)](image)

   **Figure 108: Generate Inventory (SD.306.00)**

2. To run Generate Inventory (SD.306.00) for all branches, verify the check box to the left of All Branch is selected.

3. To restrict Generate Inventory (SD.306.00) to a specific branch, clear the check box to the left of All Branch and type the identifier of the appropriate branch in Branch ID.
   
   - If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in Branch Maintenance (SD.001.00) displays.
     - To select a branch ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking Insert on the Branch Maintenance PV List accesses Branch Maintenance (SD.001.00), enabling you to add new branches to the system.

4. If Generate Inventory (SD.306.00) is to be generated for all service calls, verify that the check box to the left of All Service Calls is selected.
5. To restrict Generate Inventory (SD.306.00) to a range of service calls, clear the check box to the left of All Service Calls and type the ID of the first service call in Beginning Call ID and type the ID of the last service call in Ending Call ID.
   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in Service Call Entry (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Service Call Maintenance PV List accesses Service Call Entry (SD.200.00), enabling you to modify information for an existing service call.
     - Clicking Insert on the Service Call Maintenance PV List accesses Service Call Entry (SD.200.00), enabling you to add a new service call to the system.

6. If Generate Inventory (SD.306.00) is to be generated for all service dates, verify the check box to the left of All Service Dates is selected.

7. To restrict Generate Inventory (SD.306.00) to process all non-billable detail line items up to and including a specific Service Date, type the date in Process Through.

8. To have Qty Used and Unit Price for non-billable material detail lines entered in Invoice Entry (SD.202.00) update the quantities on hand and costs of inventory items, select the check box to the left of Book Inventory Costs.
   - A batch is created in Issues (10.020.00) of the Inventory module.

   **Note:** This option is used for Progress Billing.

9. To have purchase orders created for detail line records where a Vendor ID is populated in Invoice - T & M Details (SD.203.00) or Flat Rate Order - Modify Details (SP.202.00), select the check box to the left of Create Purchase Orders.

   **Note:** Selecting the check box to the left of Create Purchase Orders has no effect on the Purchasing module if there are no invoice detail line records with a vendor ID.

10. To have purchase orders and purchase order receipts created for detail line records where a Vendor ID is populated in Invoice - T & M Details (SD.203.00) or Flat Rate Order - Modify Details (SP.202.00), select the check box to the left of Create P.O. Receipts.

    **Note:** If Voucher Receipts is set to Always Voucher, the system creates a voucher batch in Voucher & Adjustment Entry (03.010.00) in the Accounts Payable module.

    **Note:** Selecting the check box to the left of Create P.O. Receipts has no effect on the Purchasing module if Create Receipts On Purchase Orders is not enabled in Service Series Setup Maintenance (SD.000.00).

    **Note:** A purchase order will be created for each Vendor ID associated to a detailed line record in Purchase Orders (04.250.00). If multiple detail line records of an invoice are associated with the same Vendor ID, each invoice detail line record will create a purchase order line record.

    **Note:** If Voucher Receipts Option in Service Series Setup Maintenance (SD.000.00) is set to Always Voucher, a voucher is created for each receipt in Voucher & Adjustment Entry (03.010.00) of Accounts Payable. A balanced batch is created each time Generate Inventory (SD.306.00) is processed.

11. Specify what period to post the service calls you wish to process should have. Service calls with a blank period to post will not process unless Include Service Calls having blank period to post is checked.

12. Click **Begin Processing**.

13. When the generate inventory process is finished, click OK to close the Process Status message.

14. Click **Close** on the toolbar to close Generate Inventory (SD.306.00).

15. Clicking **Cancel** also closes Generate Inventory (SD.306.00).
Invoicing

Invoicing Overview

After a service call has been dispatched and technicians have been at the customer site performing work, the service call must be completed or invoiced. Invoice Entry (SD.202.00) allows users to enter billing information for a service call or job while Invoice - T & M Details (SD.203.00) allows users to enter material and labor line item details needed to complete the work on a service call or job. Other important information can be associated with the service call invoice such as the vehicle and odometer readings to track usages for preventive maintenance.

The system provides two Service Type options when invoicing: Time & Material and Flat Rate Pricing. Time & Material allows users to enter an unlimited number of detail lines for labor and parts needed to carry out the work of the service call. Flat Rate Pricing is a separate service management module in Field Service Management that allows users to create an unlimited number of user-defined flat rates that include all of the material, labor and overhead costs needed to cover a job or service call. Since the Service Dispatch and the Flat Rate Pricing modules require inventory, material and labor are set up as inventory items in Inventory Item (10.250.00) of the Inventory module.

The quantity entered on an invoice for a non-stock item is checked against the quantity available in the Inventory module. For time and material invoices, this is done on Invoice - T & M Details (SD.203.00). For Flat Rate Pricing invoices, this is done on Flat Rate Order – Modify Details (SP.202.00). When a quantity entered is greater than the quantity available, the message displayed and options available are controlled by Allow Negative Quantities in IN Setup (10.950.00).

An inventory item that is not a non-stock item and is entered in a service invoice area allocated in the Inventory module will be allocated in the Inventory module when the invoice is saved. This provides control over the inventory by preventing the over-allocation of items by other transactions across all modules.

The system also provides three Invoice Type options when entering invoice information into Invoice Entry (SD.202.00): Invoice, Manual and Progress. The invoice number for Invoice is assigned to the service call after the service call invoice is printed and saved to the system through Service Invoice Printing – Keep/Delete (SD.642.00). Invoice requires Auto Reference Number in AR Setup (08.950.00) to be checked because the invoice number is automatically generated from Last Reference Number of AR Setup (08.950.00).

Manual requires that a user-specified invoice number be typed into Invoice/Memo Nbr before the invoice information can be saved to the system in Invoice Entry (SD.202.00). After Invoice and Manual invoices are printed and saved to the system through Service Invoice Printing – Keep/Delete (SD.642.00), the service call is considered completed. Once the service call is completed, no further changes can be made to the service call and no additional costs can be charged to the customer.

On occasions, technicians may not be able to perform all of the work on a service call and an invoice for the customer still must be generated. Service Dispatch has the capability to perform progress invoices. Progress invoicing allows users to invoice customers for material and labor used to perform the work without closing the service call. Therefore, additional work and detail lines items can be added to the service call for invoicing. Progress disables Invoice/Memo Nbr in Invoice Entry (SD.202.00) and assigns an invoice number to the printed invoices when generated using Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00).

Note: If you are invoicing a customer for a service call for the final time, change Invoice Type to Invoice.

Line Type in Invoice - T & M Details (SD.203.00) determines whether to charge the line items to a customer, to a service contract, to a project, or to nothing in the case of warranty or other non-billable charges. Billable creates a batch in Invoice & Memo (08.010.00) of Accounts Receivable and an Issues (10.020.00) COGS batch in Inventory. In-house Warranty and Manufacturer's Warranty do not create an invoice batch in Accounts Receivable, but does create a COGS transaction in Issues (10.020.00). Non-billable does not create an Accounts Receivable invoice batch, but does create a
COGS transaction in Issues (10.020.00). **Project** creates a COGS batch in Issues (10.020.00) and updates a project based on **Project ID** associated with the service call and the **Task ID** associated with the detail line item. **Service Contract** creates a COGS transaction in Issues (10.020.00) and updates the profitability of a service contract based on the **Contract ID** associated with the invoice detail line item.

After all of the billing information is entered into Invoice Entry (SD.202.00) and Invoice - T & M Details (SD.203.00), invoices are printed or sent electronically using Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00). In these screens, you select service calls for invoicing that have an Approved **Handling** in Invoice Entry (SD.202.00).
Entering Invoice Information

*Invoice Entry* (SD.202.00) is divided into tabs and includes several buttons. Each tab contains information related to a particular aspect of a service call invoice such as the service type, invoice type and invoice date. The table on the following page displays an overview of the individual tabs and buttons in *Invoice Entry* (SD.202.00).

![Invoice Entry (SD.202.00)](image)

**Figure 109: Invoice Entry (SD.202.00), Invoice Info tab**

<table>
<thead>
<tr>
<th>The tab...</th>
<th>Enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Info</td>
<td>Enter invoice information such as the service type, invoice type, invoice date, salesperson, and period to post for the invoice.</td>
</tr>
<tr>
<td>Other Info</td>
<td>Enter or view additional information such as the caller’s name, the customer's purchase order number, and media source associated with the service call.</td>
</tr>
<tr>
<td>Invoice History</td>
<td>View all invoice transactions processed against the service call.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The button...</th>
<th>Enables you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technician</td>
<td>Access <em>Invoice - Technician Information</em> (SD.028.00) and split commission for two or more technicians.</td>
</tr>
<tr>
<td>Details</td>
<td>Access <em>Invoice - T &amp; M Details</em> (SD.203.00) or <em>Invoice - Flat Rate Order</em> (SP.200.00) depending on the invoice type selected. Time &amp; Material invoices allows billable, non-billable, contract, project and warranty detail line items for material and labor. Flat rate invoices are billable line items that are not associated with service contracts or projects.</td>
</tr>
<tr>
<td>Invoice Notes</td>
<td>Access <em>Invoice - Note Entry</em> (SD.408.00) allowing you to enter notes to be included on service call invoices.</td>
</tr>
<tr>
<td>Billing Address</td>
<td>Access <em>Customer Information</em> (SD.202.01) allowing you to view customer billing address information associated with the service call invoice.</td>
</tr>
<tr>
<td>OK</td>
<td>Close <em>Invoice Entry</em> (SD.202.00) and save any changes.</td>
</tr>
</tbody>
</table>
Creating a New Invoice

The following data is required for Invoice Entry (SD.202.00):

- **Service Call ID** (Step 2)
- **Service Type** (Step 3)
- **Invoice Type** (Step 4)
- **Invoice Date** (Step 5)
- **Invoice/Memo Nbr** (Step 7 if Service Type is Manual)
- **Salesperson ID** (Step 9)
- **Period to Post** (Step 11: recommended)
- **Terms ID** (Step 12)
- **Handling** (Step 31)

To create a new invoice:

1. Open Invoice Entry (SD.202.00) by choosing **Module | Service Dispatch | Invoice Entry** from the menu.
   
   *Note:* Access Invoice Entry (SD.202.00) by clicking Invoice in Service Call Entry (SD.200.00), by clicking Invoice in Dispatch (SD.201.00).

2. Type the ID of the service call in **Service Call ID** to be invoiced.
   
   - If the service call ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in Service Call Entry (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click OK, or double-click the ID.
   - Once the **Service Call ID** is entered, the Customer ID, Customer Site, Branch ID, Project ID, and Contract ID associated with the service call is populated.

3. Choose the type of invoice detail for the service call in **Service Type**.
   
   - Time & Material
   - Flat Rate

   *Note:* Time & Material allows users to enter an unlimited number of detail lines for labor and parts needed to carry out the work of a service call. Flat Rate Pricing is a separate service management module in Field Service Management that allows users to create an unlimited number of user-defined flat rates that include all of the material, labor and overhead costs needed to complete a job or service call.

4. Choose how the invoice number is assigned for the invoice in **Invoice Type**.
   
   - Invoice: Assigned to a service call after the service call invoices are printed and saved to the system through Service Invoice Printing - Keep/Delete (SD.642.00).
   - Manual: Requires that a user-specified invoice number be typed into Invoice/Memo Nbr before the invoice information can be saved to the system in Invoice Entry (SD.202.00).
   - Progress: Allows users to invoice customers for material and labor used to perform the work without closing the service call. Therefore, additional work and detail lines items can be added to the service call for invoicing.

5. If the **Invoice Type** is Manual, type a date the work on the service call is complete in **Completed Date**.

   *Note:* If the Invoice Type is Invoice, the date the invoice is printed and processed in the system defaults to Completed Date. If the Invoice Type is Progress, no value is entered in Completed Date because the service call is not closed during the invoice printing process.
6. Type the accounts receivable aging date for the invoice in Invoice Date.

7. If the Invoice Type is Manual, type an invoice number for the invoice in Invoice/Memo Nbr.

   Note: If the Invoice Type is Invoice or Progress, Invoice/Memo Nbr is inactive.

8. Type a work order number associated with the service call in Workorder Nbr.

   • Workorder Nbr may be printed on the customer invoice.

9. Type the salesperson associated with the customer site of the service call in Salesperson ID.

   • Salesperson ID defaults from Site Maintenance (SD.025.00).

   • If the salesperson must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all salespersons set up in Salesperson Maintenance (08.310.00) displays.

     – To select a salesperson ID, highlight the ID and click OK, or double-click the ID.

     – Clicking Edit on the Salesperson List accesses Salesperson Maintenance (08.310.00), enabling you to modify information for existing salespersons.

     – Clicking Insert on the Salesperson List accesses Salesperson Maintenance (08.310.00), enabling you to add new salespersons to the database.

10. Type the technician who performed the work of the service call in Primary Tech.

   • Primary Tech defaults from Service Call Entry (SD.200.00) or Dispatch (SD.201.00).

   • If the technician must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.

     – To select a technician ID, highlight the ID and click OK, or double-click the ID.

     – Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.

     – Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new technicians to the system.

11. Type the period you want the invoice to update in the Accounts Receivable and General Ledger modules in Period to Post.

   Note: Period to Post is important when selecting service calls to be invoiced in Service Invoice Selection (SD.641.00). Only invoices that have a Period to Post in Invoice Entry (SD.202.00) that matches the Period to Post in Service Invoice Selection (SD.641.00) are selected for invoicing.

12. Type a term to associate with the invoice in Terms ID.

   • Terms ID defaults from Customer Maintenance (08.260.00).

   • If the terms ID is unknown, press F3 or double-click the right mouse button. A list of all terms set up in Terms Maintenance (21.270.00) displays.

     – To select a terms ID, highlight the ID and click OK, or double-click the ID.

     – Clicking Edit on the Terms Maintenance List accesses Terms Maintenance (21.270.00), enabling you to modify information for existing terms.

     – Clicking Insert on the Terms Maintenance List accesses Terms Maintenance (21.270.00), enabling you to add new terms to the system.

   • Terms ID is for informational purposes only.

   Note: Terms are used to create Due Date and Discount Date of an invoice in Invoice & Memo (08.010.00) when a service call invoice is printed in Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00) and processed in Service Invoice Printing - Keep/Delete (SD.642.00). Due Date and Discount Date of an invoice are based on Invoice Date and Terms ID of the invoice.
Note: Multiple installment terms have no effect on Field Service Management modules. Multiple installment terms are processed when the batch of invoices is released in Invoice & Memo (08.010.00).

13. If the work of a service call is covered under a manufacturer or in-house warranty, and the manufacturer must be invoiced for the material and labor costs, enter the customer ID of the manufacturer in Alt Cust ID.
   - If the customer ID is unknown, press F3 or double-click the right mouse button. A list of all active customers set up in Customer Maintenance (08.260.00) displays.
     - To select a customer ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Customer Maintenance List accesses Customer Maintenance (08.260.00), enabling you to modify information for existing customer.
     - Clicking Insert on the Customer Maintenance List accesses Customer Maintenance (08.260.00), enabling you to add new customers to the system.

14. If the service call is a “call back,” type the identifier of the original service call in Orig Call Nbr.

15. Type a 30-character explanation of the service call invoice in Description.
   - Description is for informational purposes only.

16. Click the Other Info tab or press ALT+O. The Other Info tab displays.

Additional information may be entered into the Other Info tab; however, all the fields on this tab are optional. They are for informational purposes only.
17. Type a different call status associated with the service call in **Call Status**.
   - If the call status must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in **Call Status Maintenance** (SD.002.00) displays.
     - To select a branch ID, highlight the ID and click the OK call status, or double-click the ID.
     - Clicking **Edit** on the **Call Status Maintenance PV List** accesses **Call Status Maintenance** (SD.003.00), enabling you to modify information for an existing call status.
     - Clicking **Insert** on the **Call Status Maintenance PV List** accesses **Call Status Maintenance** (SD.003.00), enabling you to add new call statuses to the system.
   - **Call Status** defaults from **Service Call Entry** (SD.200.00).

18. Type a different call type associated with a service call in **Call Type**.
   - **Call Type** defaults from **Service Call Entry** (SD.200.00).
   - If the call type ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in **Call Type Maintenance** (SD.003.00) displays.
     - To select a call type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Call Type Maintenance PV List** accesses **Call Type Maintenance** (SD.003.00), enabling you to modify information for an existing call type.
     - Clicking **Insert** on the **Call Type Maintenance PV List** accesses **Call Type Maintenance** (SD.003.00), enabling you to add new call types to the system.

19. Type a different name for the person who requested the service call in **Caller Name**.
   - **Caller Name** defaults from **Service Call Entry** (SD.200.00).

20. Type a different purchase order number associated with the service call **Customer PO**.
   - **Customer PO** defaults from **Service Call Entry** (SD.200.00).

21. Choose a payment method for the service invoice in **Payment Method**.
   - American Express
   - Cash
   - Check
   - Discover
   - In-house Charge
   - MasterCard
   - Visa

   **Note:** **Payment Method** is for informational purposes only.

22. If the **Payment Method** is check or a credit card, type the check or credit card number in **Check/Card Nbr**.

   **Note:** **Check/Card Nbr** is for informational purposes only.

23. If the **Payment Method** is credit card, type the credit card expiration number in **Exp Date**.

   **Note:** **Exp Date** is for informational purposes only.

24. Type the name of the user entering the invoice in **Processed By**.
25. Type the date the invoice is being entered into the system in **Processed Date**.
26. Type the name of the user who reviewed the invoice for accuracy in **Reviewed By**.
27. Type the date the invoice was reviewed for accuracy in **Reviewed Date**.
28. Click **Save** on the toolbar.
29. Enter specific invoice details into Invoice - T & M Details (SD.203.00). The following invoice detail types are available:
   - Billable material inventory line items
   - Billable labor inventory line items
   - In-house warranty material inventory line items
   - In-house warranty labor inventory line items
   - Manufacturer warranty material inventory line items
   - Manufacturer warranty labor inventory line items
   - Non-billable material inventory line items
   - Non-billable labor inventory line items
   - Project material inventory line items
   - Project labor inventory line items
   - Service contract material inventory line items
   - Service contract labor inventory line items
   - See the following sections for more information.

   **Note:** Quantities on inventory line items that are not non-stock are checked against the quantity available in the Inventory module as each line is entered to verify that sufficient stock is available to allocate to the invoice.

30. When you are finished entering specific invoice details, click **OK** to close Invoice - T & M Details (SD.203.00).
    Invoice Entry (SD.202.00) displays.

31. Choose Approved for Handling.

   **Note:** Handling must be set to Approved in order to select the service call to be invoiced in Service Invoice Selection (SD.641.00).

32. Click **Save** to save changes to the current invoice; click **Finish** to enter the next invoice.

   **Note:** Inventory line items that are not non-stock items are allocated in the Inventory module to prevent over-allocation of items by other transactions.
Entering Time and Material Details

Entering Time and Material Invoice Detail Information

Invoice - T & M Details (SD.203.00) allows users to enter labor and material line item details needed to complete the work on a service call or job. To enter specific line item details for work performed on a service call or job, select Time and Material in Service Type in Invoice Entry (SD.202.00).

To enter billable material inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   Invoice - T & M Details (SD.203.00) displays.

2. Select the type of detail for the line item in Line Types.
   - Select Billable from the drop-down list.
3. Type the material inventory items used to complete the work of a service call in **Line Item ID**.
   - If the inventory ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in **Inventory Items** (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to add new inventory items to the system.
   - Once **Line Item ID** is populated, the description of the inventory item to the right of **Line Item ID**, **Detail Type**, **Class**, **Base Price**, **Unit Price**, **Tax ID**, **Unit Cost**, **Rev Acct**, and **COGS Acct** are populated.
   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

4. Type a different description for the material inventory item in the field to the right of **Line Item ID**.

5. Type the site of the inventory item where the quantity on hand is reduced by **Qty Used** in **Invt Location ID**.
   - If the inventory location must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in **Sites** (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to add new inventory locations to the system.
   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

6. Type the warehouse location of the inventory item where the quantity on hand is reduced by **Qty Used** in **Whse Loc**.
   - If the warehouse location ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in **Warehouse Bin Locations** (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click **OK**, or double-click the ID.
   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

7. Type the quantity of the inventory item used to perform the work on a service call in **Qty Used**.
   - **Qty Used** is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, **Allow Negative Quantities** in **IN Setup** (10.950.00) controls the message displayed and options available.
8. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in **Lot/Ser Nbr**.
   - If the lot/serial number ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     - To select a lot/serial number, highlight the ID and click OK, or double-click the ID.
     - Quantity available must be greater than zero to select a lot/serial number.
     - For serial number-controlled items, **Qty Used** must be 1 (an issue from inventory) or -1 (a return to inventory).
     - For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     - For serial number-controlled items returned to inventory, the serial number must not already exist.

9. Type the unit price for the inventory item in **Unit Price**.
   - **Unit Price** may differ from **Stock Base Price** of the inventory item if any special pricing is applicable.

10. Type a tax identifier associated with the detail line item in **Tax ID**.
    - If the tax ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in **Tax Maintenance** (21.280.00) displays.
      - To select a tax ID, highlight the ID and click OK, or double-click the ID.
      - Clicking **Edit** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to modify information for existing sales taxes.
      - Clicking **Insert** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to add new sales taxes to the system.

11. Type the date material inventory item associated with the line item was used in **Service Date**.
    - If **Equipment ID** is associated with the line item, then **Service Date** determines when the period in **Equipment History** (SE.012.00) in the Equipment Maintenance module is updated. For billable inventory items, **Equipment History** (SE.012.00) is updated in **Service Invoice Printing - Keep/Delete** (SD.642.00).

12. If a purchase order is required for the inventory item, type the vendor identifier associated with the line item record in **Vendor ID**.
    - If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in **Vendor Maintenance** (03.270.00) displays.
      - To select a vendor ID, highlight the ID and click OK, or double-click the ID.
      - Clicking **Edit** on the **Vendor List** accesses **Vendor Maintenance** (03.270.00), enabling you to modify information for existing vendors.
      - Clicking **Insert** on the **Vendor List** accesses **Vendor Maintenance** (03.270.00), enabling you to add new vendors to the system.

    **Note:** A purchase order will be created in **Generate Inventory** (SD.306.00) for each Vendor ID associated with a detail line record in **Purchase Orders** (04.250.00). If multiple detail line records of an invoice are associated with the same Vendor ID, each invoice detail line record will create a purchase order line record.

13. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in **PO Date**.
    - **PO Date** is inactive until **Vendor ID** is populated.

14. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in **Qty Ordered**.
    - **Qty Ordered** is inactive until **Vendor ID** is populated.
15. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in Qty Received.
   - Qty Received is inactive until Vendor ID is populated.

   **Note:** A purchase order receipt will be created in Generate Inventory (SD.306.00) when Create P.O. Receipts is selected in Generate Inventory (SD.306.00) and Create Receipts On Purchase Orders is set to Yes in Service Series Setup Maintenance (SD.000.00).

16. If PO Number Option in Service Series Setup Maintenance (SD.000.00) is Manual, type the purchase order number in PO Number.
   - If PO Number Option in Service Series Setup Maintenance (SD.000.00) is Automatic, PO Number is populated by the system from Generate Inventory (SD.306.00).

17. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in Unit Cost.
   - Unit Cost defaults according to the costing method of the inventory item in Inventory Items (10.250.00).
   - Unit Cost becomes active when Vendor ID is associated with the inventory line item.

18. If the work for the service call is associated with a piece of equipment, type the equipment identifier in Equipment ID.
   - If the equipment ID is unknown, press F3 or double-click the right mouse button. A list of all equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click OK, or double-click the ID.

19. Type the revenue account associated with the inventory line item in Rev Acct.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account number set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
   - Clicking Insert on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.

20. Type the revenue subaccount associated with the inventory line item in Rev Sub.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount number set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
   - Clicking Edit on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
   - Clicking Insert on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
• Rev Sub defaults from several places:
  – If **Use Sub From Site** is selected in **Call Type Maintenance** (SD.003.00), then Rev Sub defaults from **Sub Account** in **Site Maintenance** (SD.025.00).
  – If **Use Sub From Site** is not selected in **Call Type Maintenance** (SD.003.00), then Rev Sub defaults from **Subaccount** in **Call Type Maintenance** (SD.003.00).
  – If a contract ID is associated with the detail line item, then Rev Sub defaults from **Deferred Revenue Subaccount** in **Contract Type Maintenance** (SN.003.00) unless **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00). If **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00), then Rev Sub defaults from **Sub Account** in **Site Maintenance** (SD.025.00).

21. Type the cost of goods account associated with the inventory line item in **COGS Acct**.

• If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account number set up in **Account Maintenance** (01.260.00) displays.
  – To select an account number, highlight the ID and click **OK**., or double-click the ID.
  – Clicking **Edit** on the **Active Account List** accesses **Account Maintenance** (01.260.00), enabling you to modify information for an existing account number.
  – Clicking **Insert** on the **Active Account List** accesses **Account Maintenance** (01.260.00), enabling you to add new account numbers to the system.

• **COGS Acct** defaults from the inventory item in **Inventory Items** (10.250.00).

22. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.

• If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount number set up in **Subaccount Maintenance** (01.270.00) displays.
  – To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
  – Clicking **Edit** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to modify information for an existing subaccount number.
  – Clicking **Insert** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to add new subaccount numbers to the system.

• **COGS Sub** defaults from several places:
  – If **Use Sub From Site** is selected in **Call Type Maintenance** (SD.003.00), then COGS Sub defaults from **Sub Account** in **Site Maintenance** (SD.025.00).
  – If **Use Sub From Site** is not selected in **Call Type Maintenance** (SD.003.00), then COGS Sub defaults from **Subaccount** in **Call Type Maintenance** (SD.003.00).
  – If a contract ID is associated with the detail line item, then COGS Sub defaults from **Deferred COGS Subaccount** in **Contract Type Maintenance** (SN.003.00) unless **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00). If **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00), then COGS Sub defaults from **Sub Account** in **Site Maintenance** (SD.025.00).

23. Click **Save** on the toolbar.

24. Click **Close** on the toolbar.
Entering Billable Labor Inventory Line Items

To enter billable labor inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   *Invoice - T & M Details* (SD.203.00) displays.
2. Select the type of detail for the line item in Line Types.
   - Select **Billable** from the drop-down list.
3. Type the labor inventory items used to complete the work on a service call in Line Item ID.
   - If the inventory ID is unknown, press **F3** or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct, and COGS Acct are populated.
4. Type a different description for the inventory item in the field to the right of Line Item ID.
5. Type the site associated with the labor inventory item in Invt Location ID.
   - Setting up labor as a non-stock inventory item is recommended.
   - If the inventory location ID must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory location to the system.
6. Type the warehouse location associated with the labor in Whse Loc.
   - Setting up labor as a non-stock inventory item is recommended.
   - If the warehouse location ID must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click **OK**, or double-click the ID.
7. Type the number of hours to be paid to technicians for the work completed on a service call in Worked Hours.
   - *Generate Payroll Process* (SD.302.00) is used to create a timesheet in Payroll Time and Dollar Entry (02.020.00).
8. Type the number of hours to be charged to the customer in Billed Hrs.
   - When service call invoices are processed in Service Invoice Printing - Keep/Delete (SD.642.00), a batch is created in Invoice and Memo (08.010.00) in the Accounts Receivable module.
9. Type the unit price for the labor inventory item in Unit Price.
   - Unit Price defaults from Stock Base Price associated with the labor item in Inventory Items (10.250.00).
10. Type the employee identifier associated with the technician that performed the work on the service call in **Employee ID**.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in **Employee Maintenance** (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new technicians to the system.
   - **Employee ID** is populated from the primary technician associated with the service call.

11. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in **Earnings Type Maintenance** (02.270.00) in the Payroll module displays.
     - To select an earnings type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Earnings Type List** accesses **Earnings Type Maintenance** (02.270.00), enabling you to modify information for an existing earnings type.
     - Clicking **Insert** on the **Earnings Type List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new earning types to the system.
   - **Earnings Type ID** defaults from **Employee Maintenance** (SD.007.00) for the **Employee ID** associated with the detail line.

12. Type the work location associated with the line item in **Work Location**.
   - If the work location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all work location set up in **Work Location Maintenance** (02.280.00) displays.
     - To select a work location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Work Location Maintenance List** accesses **Work Location Maintenance** (02.280.00), enabling you to modify information for an existing work location.
     - Clicking **Insert** on the **Work Location Maintenance List** accesses **Work Location Maintenance** (02.280.00), enabling you to add new work locations to the system.
   - **Work Location** defaults from **Employee Maintenance** (SD.007.00) for the **Employee ID** associated with the detail line.

13. Type a tax identifier associated with the line item in **Tax ID**.
   - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in **Tax Maintenance** (21.280.00) displays.
     - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking **Insert** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to add new sales taxes to the system.
   - **Tax ID** defaults from **Tax ID** associated with the customer site in **Site Maintenance** (SD.025.00).
   - Tax ID is only enabled for Billable **Line Types**.

**Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.
14. Type the date the work was performed associated with the line item in **Service Date**.
   - If **Equipment ID** is associated with the line item, then **Service Date** determines when the period in **Equipment History** (SE.012.00) in the Equipment Maintenance module is updated. For billable inventory items, **Equipment History** (SE.012.00) is updated in **Service Invoice Printing - Keep/Delete** (SD.642.00).

15. If the work performed is associated with a piece of equipment, type the equipment identifier associated with the line item in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all equipment set up in **Equipment Entry** (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.

16. Type the revenue account associated with the inventory line item in **Rev Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in **Account Maintenance** (01.260.00) displays.
     - To select an account number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Account List** accesses **Account Maintenance** (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the **Active Account List** accesses **Account Maintenance** (01.260.00), enabling you to add new account numbers to the system.
   - **Rev Acct** defaults from the inventory item in **Inventory Items** (10.250.00).

17. Type the revenue subaccount associated with the inventory line item in **Rev Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in **Subaccount Maintenance** (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to add new subaccount numbers to the system.
   - **Rev Sub** defaults from several places:
     - If **Use Sub From Site** is selected in **Call Type Maintenance** (SD.003.00), then **Rev Sub** defaults from **Sub Account** in **Site Maintenance** (SD.025.00).
     - If **Use Sub From Site** is not selected in **Call Type Maintenance** (SD.003.00), then **Rev Sub** defaults from **Subaccount** in **Call Type Maintenance** (SD.003.00).
     - If a contract ID is associated with the detail line item, then **Rev Sub** defaults from **Deferred Revenue Subaccount** in **Contract Type Maintenance** (SN.003.00) unless **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00). If **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00), then **Deferred Revenue Subaccount** defaults from **Sub Account** in **Site Maintenance** (SD.025.00).
18. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in *Account Maintenance* (01.260.00) displays.
     - To select an account number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Account List** accesses *Account Maintenance* (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the **Active Account List** accesses *Account Maintenance* (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in *Inventory Items* (10.250.00).

19. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in *Subaccount Maintenance* (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Subaccount List** accesses *Subaccount Maintenance* (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the **Active Subaccount List** accesses *Subaccount Maintenance* (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in *Call Type Maintenance* (SD.003.00), then **COGS Sub** defaults from **Sub Account** in *Site Maintenance* (SD.025.00).
     - If **Use Sub From Site** is not selected in *Call Type Maintenance* (SD.003.00), then **COGS Sub** defaults from **Call Type Maintenance** (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from **Deferred COGS Subaccount** in *Contract Type Maintenance* (SN.003.00) unless **Use Subaccount From Site** is selected in *Subaccount From Site* in *Contract Type Maintenance* (SN.003.00). If **Use Subaccount From Site** is selected in *Contract Type Maintenance* (SN.003.00), then **COGS Sub** defaults from **Sub Account** in *Site Maintenance* (SD.025.00).

20. Click **Save** on the toolbar.
21. Click **Close** on the toolbar.
Entering In-House Warranty Material Inventory Line Items

**Note:** Information completed in this section populates the *In-House Warranty Report*.

To enter in-house warranty material inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   
   *Invoice - T & M Details (SD.203.00)* displays.

2. Select the type of detail for the line item in **Line Types**.
   
   - Select *In-House Warranty* from the drop-down list.

3. Type the material inventory item used to complete the work of a service call in **Line Item ID**.
   
   - If the inventory ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) displays.
     
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Inventory Item List* accesses *Inventory Items* (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the *Inventory Item List* accesses *Inventory Items* (10.250.00), enabling you to add new inventory items to the system.
   
   - Once **Line Item ID** is populated, the description of the inventory item to the right of **Line Item ID**, **Detail Type**, **Class**, **Base Price**, **Unit Price**, **Tax ID**, **Unit Cost**, **Rev Acct**, and **COGS Acct** are populated.

4. Type a different description for the inventory item in the field to the right of **Line Item ID**.

5. Type the site of the inventory item where the quantity on hand is reduced by **Qty Used** in **Invt Location ID**.
   
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in *Sites* (10.310.00) displays.
     
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Inventory Location List* accesses *Sites* (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the *Inventory Location List* accesses *Sites* (10.310.00), enabling you to add new inventory locations to the system.

   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

6. Type the warehouse location of the inventory item where the quantity on hand is reduced by **Qty Used** in **Whse Loc**.
   
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in *Warehouse Bin Locations* (10.340.00) displays.

   - To select a warehouse location ID, highlight the ID and click **OK**, or double-click the ID.

   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.
7. Type the quantity of the inventory item used to perform the work on a service call in Qty Used.
   - Qty Used is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, Allow Negative Quantities on IN Setup (10.950.00) controls the message displayed and options available.

8. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in Lot/Ser Nbr.
   - If the lot/serial number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     - To select a lot/serial number, highlight the ID and click OK, or double-click the ID.
     - Quantity available must be greater than zero to select a lot/serial number.
     - For serial number-controlled items, Qty Used must be 1 (an issue from inventory) or -1 (a return to inventory).
     - For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     - For serial number-controlled items returned to inventory, the serial number must not already exist.

9. Type a tax ID associated with the detail line item in Tax ID.
   - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
     - To select a tax ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
   - Tax ID defaults from Tax ID associated with the customer site in Site Maintenance (SD.025.00).
   - Tax ID is only enabled for Billable Line Types.
   
   **Note:** If the inventory item is tax-exempt, Taxable Amount is $0.00.

10. Type the date the work associated with the line item was performed in Service Date.

11. If a purchase order is required for the inventory item, type the vendor ID associated with the line item record in Vendor ID.
   - If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in Vendor Maintenance (03.270.00) displays.
     - To select a vendor ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
     - Clicking Insert on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.

12. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in PO Date.
   - PO Date is inactive until Vendor ID is populated.

13. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in Qty Ordered.
   - Qty Ordered is inactive until Vendor ID is populated.
14. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in **Qty Received**.
   - **Qty Received** is inactive until **Vendor ID** is populated.

15. If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Manual, type the purchase order number in **PO Number**.
   - If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Automatic, **PO Number** is populated by the system from Generate Inventory (SD.306.00).

16. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in **Unit Cost**.
   - **Unit Cost** defaults according to the costing method of the inventory item in Inventory Items (10.250.00).
   - **Unit Cost** becomes active when **Vendor ID** is associated with the inventory line item.

17. If the inventory material item is associated with a piece of equipment, type the equipment identifier in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click OK, or double-click the ID.

18. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
   - Clicking **Edit** on the **Active Account List** accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
   - Clicking **Insert** on the **Active Account List** accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.

19. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
   - Clicking **Edit** on the **Active Subaccount List** accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
   - Clicking **Insert** on the **Active Subaccount List** accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
Invoicing

- **COGS Sub** defaults from several places:
  - If **Use Sub From Site** is selected in **Call Type Maintenance** (SD.003.00), then **COGS Sub** defaults from **Sub Account** in **Site Maintenance** (SD.025.00).
  - If **Use Sub From Site** is not selected in **Call Type Maintenance** (SD.003.00), then **COGS Sub** defaults from **Subaccount** in **Call Type Maintenance** (SD.003.00).
  - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from **Deferred COGS Subaccount** in **Contract Type Maintenance** (SN.003.00) unless **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00). If **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00), then **COGS Sub** defaults from **Sub Account** in **Site Maintenance** (SD.025.00).

**Note:** A revenue account/subaccount is not necessary; a batch is not created in the Accounts Receivable module.

20. Click **Save** on the toolbar.
21. Click **Close** on the toolbar.

**Entering In-House Warranty Labor Inventory Line Items**

To enter in-house warranty labor inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click **Details**.  
   **Invoice - T & M Details** (SD.203.00) displays.
2. Select the type of detail for the line item in **Line Types**.
   - Select **In-House Warranty** from the drop-down list.
3. Type the labor inventory item used to complete the work of a service call in **Line Item ID**.
   - If the inventory ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in **Inventory Items** (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to add new inventory items to the system.
   - Once **Line Item ID** is populated, the description of the inventory item to the right of **Line Item ID**, **Detail Type**, **Class**, **Base Price**, **Unit Price**, **Tax ID**, **Unit Cost**, **Rev Acct**, and **COGS Acct** are populated.
4. Type a different description for the inventory item in the field to the right of **Line Item ID**.
5. Type the site associated with the in-house labor inventory in **Inv Location ID**.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in **Sites** (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses **Inventory Items** (10.250.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses **Inventory Items** (10.250.00), enabling you to add new inventory locations to the system.
6. Type the site associated with the in-house labor inventory in **Whse Loc**.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in **Warehouse Bin Locations** (10.340.00) displays.
7. Type the number of hours to be paid to technicians for the work completed on a service call in **Worked Hours**.
   - *Generate Payroll Process (SD.302.00)* is used to create a timesheet in *Payroll Time and Dollar Entry (02.020.00)*.
8. Type the employee identifier associated with the technician that performed the work on the service call in **Employee ID**.
   - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in *Employee Maintenance (SD.007.00)* displays.
     - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Employee Maintenance PV List* accesses *Employee Maintenance (SD.007.00)*, enabling you to modify information for an existing technician.
     - Clicking **Insert** on the *Employee Maintenance PV List* accesses *Employee Maintenance (SD.007.00)*, enabling you to add new technicians to the system.
9. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in *Earnings Type Maintenance (02.270.00)* in the Payroll module displays.
     - To select an earnings type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Earnings Type List* accesses *Earnings Type Maintenance (02.270.00)*, enabling you to modify information for an existing earnings type.
     - Clicking **Insert** on the *Earnings Type List* accesses *Employee Maintenance (SD.007.00)*, enabling you to add new earnings types to the system.
   - *Earnings Type ID* defaults from *Employee Maintenance (SD.007.00)* for the **Employee ID** associated with the detail line.
10. Type the work location associated with the line item in **Work Location**.
    - If the work location must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all work locations set up in *Work Location Maintenance (SD.007.00)* displays.
      - To select a work location ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the *Work Location Maintenance List* accesses *Work Location Maintenance (02.280.00)*, enabling you to modify information for an existing work location.
      - Clicking **Insert** on the *Work Location Maintenance List* accesses *Work Location Maintenance (02.280.00)*, enabling you to add new work locations to the system.
    - *Work Location* defaults from *Employee Maintenance (SD.007.00)* for the **Employee ID** associated with the detail line.
11. Type a tax identifier associated with the line item in **Tax ID**.
    - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in *Tax Maintenance (21.280.00)* displays.
      - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the *Sales Tax List* accesses *Tax Maintenance (21.280.00)*, enabling you to modify information for existing sales taxes.
      - Clicking **Insert** on the *Sales Tax List* accesses *Tax Maintenance (21.280.00)*, enabling you to add new sales taxes to the system.
- **Tax ID** defaults from **Tax ID** associated with the customer site in **Site Maintenance** (SD.025.00).
- Tax ID is only enabled for **Billable Line Types**.

**Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.

12. Type the date the work was performed associated with the line item in **Service Date**.

13. If the work performed is associated with a piece of equipment, type the equipment identifier in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in **Equipment Entry** (SE.001.00) of the Equipment Maintenance module displays.
   - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.

14. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in **Account Maintenance** (01.260.00) displays.
   - To select an account number, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **Active Account List** accesses **Account Maintenance** (01.260.00), enabling you to modify information for an existing account number.
   - Clicking **Insert** on the **Active Account List** accesses **Account Maintenance** (01.260.00), enabling you to add new account numbers to the system.

   - **COGS Acct** defaults from the inventory item in **Inventory Items** (10.250.00).

15. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in **Subaccount Maintenance** (01.270.00) displays.
   - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to modify information for an existing subaccount number.
   - Clicking **Insert** on the **Active Subaccount List** accesses **Subaccount Maintenance** (01.270.00), enabling you to add new subaccount numbers to the system.

   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in **Call Type Maintenance** (SD.003.00), then **COGS Sub** defaults from **Sub Account** in **Site Maintenance** (SD.025.00).
     - If **Use Sub From Site** is not selected in **Call Type Maintenance** (SD.003.00), then **COGS Sub** defaults from **Subaccount** in **Call Type Maintenance** (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from **Deferred COGS Subaccount** in **Contract Type Maintenance** (SN.003.00) unless **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00). If **Use Subaccount From Site** is selected in **Contract Type Maintenance** (SN.003.00), then **COGS Sub** defaults from **Sub Account** in **Site Maintenance** (SD.025.00).

16. Click **Save** on the toolbar.

17. Click **Close** on the toolbar.
Entering Manufacturer Warranty Material Inventory Line Items

To enter manufacturer warranty material inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   *Invoice - T & M Details* (SD.203.00) displays.

2. Select the type of detail for the line item in Line Types.
   - Select Mfr Warranty from the drop-down list.

3. Type the material inventory item used to complete the work of a service call in Line Item ID.
   - If the inventory ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in *Inventory Items* (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct, and COGS Acct are populated.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

4. Type a different description for the inventory item in the field to the right of Line Item ID.

5. Type the site of the manufacturer warranty material inventory item in Inv Location ID.
   - If the inventory location ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking Insert on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory locations to the system.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

6. Type the warehouse location of the manufacturer warranty material inventory item in Whse Loc.
   - If the warehouse location ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click OK, or double-click the ID.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

7. Type the quantity of the inventory item used to perform the work on a service call in Qty Used.
   - Qty Used is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, Allow Negative Quantities on IN Setup (10.950.00) controls the message displayed and options available.
8. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in Lot/Ser Nbr.
   - If the lot/serial number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     - To select a lot/serial number, highlight the ID and click OK, or double-click the ID.
     - Quantity available must be greater than zero to select a lot/serial number.
     - For serial number-controlled items, Qty Used must be 1 (an issue from inventory) or -1 (a return to inventory).
     - For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     - For serial number-controlled items returned to inventory, the serial number must not already exist.

9. Type the tax identifier associated with the detail line item in Tax ID.
   - If the tax ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
     - To select a tax ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
   - Tax ID defaults from Tax ID associated with the customer site in Site Maintenance (SD.025.00).
   - Tax ID is only enabled for Billable Line Types.

   Note: If the inventory item is tax-exempt, Taxable Amount is $0.00.

10. Type the date the work associated with the line item was performed in Service Date.

11. If a purchase order is required for the inventory item, type the vendor identifier associated with the line item record in Vendor ID.
   - If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in Vendor Maintenance (03.270.00) displays.
     - To select a vendor ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
     - Clicking Insert on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.

12. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in PO Date.
   - PO Date is inactive until Vendor ID is populated.

13. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in Qty Ordered.
   - Qty Ordered is inactive until Vendor ID is populated.

14. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in Qty Received.
   - Qty Received is inactive until Vendor ID is populated.
15. If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Manual, type the purchase order number in **PO Number**.
   - If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Automatic, **PO Number** is populated by the system from Generate Inventory (SD.306.00).

16. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in **Unit Cost**.
   - **Unit Cost** defaults according to the costing method of the inventory item in Inventory Items (10.250.00).
   - **Unit Cost** becomes active when **Vendor ID** is associated with the inventory line item.

17. Type a piece of equipment associated with the line item in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all the equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.

18. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
   - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in Inventory Items (10.250.00).

19. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
   - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
   - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Sub Account in Site Maintenance (SD.025.00).
     - If **Use Sub From Site** is not selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Subaccount in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00). If **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00), then **COGS Sub** defaults from Sub Account in Site Maintenance (SD.025.00).

20. Click **Save** on the toolbar.
21. Click **Close** on the toolbar.
Entering Manufacturer Warranty Labor Inventory Line Items

**Note:** This section is used for informational purposes only. The Manufacturer Warranty Report (SE.400.00) in the Equipment Maintenance module uses the data entered into this section.

To enter manufacturer warranty labor inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.

   *Invoice - T & M Details* (SD.203.00) displays.

2. Select the type of detail for the line item in **Line Types**.
   - Select **Mfr Warranty** from the drop-down list.

3. Type the labor inventory item used to complete the work of a service call in **Line Item ID**.
   - If the inventory is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in **Inventory Items** (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to add new inventory items to the system.
   - Once **Line Item ID** is populated, the description of the inventory item to the right of **Line Item ID**, **Detail Type**, **Class**, **Base Price**, **Unit Price**, **Tax ID**, **Unit Cost**, **Rev Acct** and **COGS Acct** are populated.

4. Type a different description for the inventory item in the field to the right of **Line Item ID**.

5. Type the location of the manufacturer warranty labor inventory item in **Invt Location ID**.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in **Sites** (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to add new inventory locations to the system.

**Note:** Labor is considered a non-stock, non-inventory item. When processing a labor detail line item, quantity on hand is not reduced.

6. Type the warehouse location of the manufacturer warranty labor inventory item in **Whse Loc**.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in **Warehouse Bin Locations** (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click **OK**, or double-click the ID.

7. Type the number of hours to be paid to technicians for the work completed on a service call in **Worked Hours**.
   - **Generate Payroll Process** (SD.302.00) is used to create a timesheet in **Payroll Time and Dollar Entry** (02.020.00).
8. Type the employee identifier associated with the technician that performed the work on the service call in **Employee ID**.
   - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in *Employee Maintenance* (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Employee Maintenance PV List* accesses *Employee Maintenance* (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking **Insert** on the *Employee Maintenance PV List* accesses *Employee Maintenance* (SD.007.00), enabling you to add new technicians to the system.

9. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in *Earnings Type Maintenance* (02.270.00) in the Payroll module displays.
     - To select an earnings type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the *Earnings Type List* accesses *Earnings Type Maintenance* (02.270.00), enabling you to modify information for an existing earnings type.
     - Clicking **Insert** on the *Earnings Type List* accesses *Employee Maintenance* (SD.007.00), enabling you to add new earnings types to the system.
     - **Earnings Type ID** defaults from *Employee Maintenance* (SD.007.00) for the **Employee ID** associated with the detail line.

10. Type the work location associated with the line item in **Work Location**.
    - If the work location ID is unknown, press F3 or double-click the right mouse button. A list of all work locations set up in *Work Location Maintenance* (02.280.00) displays.
      - To select a work location ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the *Work Location Maintenance List* accesses *Work Location Maintenance* (02.280.00), enabling you to modify information for an existing work location.
      - Clicking **Insert** on the *Work Location Maintenance List* accesses *Work Location Maintenance* (02.280.00), enabling you to add new work locations to the system.
      - **Work Location** defaults from *Employee Maintenance* (SD.007.00) for the **Employee ID** associated with the detail line.

11. Type a tax identifier associated with the line item in **Tax ID**.
    - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in *Tax Maintenance* (21.280.00) displays.
      - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the *Sales Tax List* accesses *Tax Maintenance* (21.280.00), enabling you to modify information for existing sales taxes.
      - Clicking **Insert** on the *Sales Tax List* accesses *Tax Maintenance* (21.280.00), enabling you to add new sales taxes to the system.
      - **Tax ID** defaults from **Tax ID** associated with the customer site in *Site Maintenance* (SD.025.00).
      - Tax ID is only enabled for Billable **Line Types**.

      **Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.

12. Type the date the work was performed associated with the line item in **Service Date**.
13. Type a piece of equipment to associate with the line item in Equipment ID.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click OK, or double-click the ID.
14. Type the cost of goods account associated with the inventory line item in COGS Acct.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking Insert on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - COGS Acct defaults from the inventory item in Inventory Items (10.250.00).
15. Type the cost of goods subaccount associated with the inventory line item in COGS Sub.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking Insert on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - COGS Sub defaults from several places:
     - If Use Sub From Site is selected in Call Type Maintenance (SD.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).
     - If Use Sub From Site is not selected in Call Type Maintenance (SD.003.00), then COGS Sub defaults from Subaccount in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then COGS Sub defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00). If Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).
16. Click Save on the toolbar.
17. Click Close on the toolbar.

**Entering Non-Billable Material Inventory Line Items**

To enter non-billable material inventory line items:
1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   
   Invoice - T & M Details (SD.203.00) displays.
2. Select the type of detail for the line item in Line Types.
   - Select Non-Billable from the drop-down list.
3. Type the material inventory item used to complete the work of a service call in Line Item ID.
   - If the inventory ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct, and COGS Acct are populated.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

4. Type a different description for the inventory item in the field to the right of Line Item ID.

5. Type the site of the inventory item where the quantity on hand is reduced by Qty Used in Inv Location ID.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking Insert on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory locations to the system.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

6. Type the warehouse location of the inventory item where the quantity on hand is reduced by Qty Used in Whse Loc.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click OK, or double-click the ID.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

7. Type the quantity of the inventory item used to perform the work on a service call in Qty Used.
   - Qty Used is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, Allow Negative Quantities on IN Setup (10.950.00 controls the message displayed and options available.)
8. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in **Lot/Ser Nbr**.
   - If the lot/serial number ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     - To select a lot/serial number, highlight the ID and click **OK**, or double-click the ID.
     - Quantity available must be greater than zero to select a lot/serial number.
     - For serial number-controlled items, **Qty Used** must be 1 (an issue from inventory) or -1 (a return to inventory).
     - For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     - For serial number-controlled items returned to inventory, the serial number must not already exist.

9. Type a tax identifier associated with the detail line item in **Tax ID**.
   - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
     - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking **Insert** on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
   - **Tax ID** defaults from **Tax ID** associated with the customer site in Site Maintenance (SD.025.00).
   - Tax ID is only enabled for Billable **Line Types**.

   **Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.

10. Type the date the work associated with the line item was performed in **Service Date**.

11. If a purchase order is required for the inventory item, type the vendor ID associated with the line item record in **Vendor ID**.
   - If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in Vendor Maintenance (03.270.00) displays.
     - To select a vendor ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
     - Clicking **Insert** on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.

12. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in **PO Date**.
   - **PO Date** is inactive until **Vendor ID** is populated.

13. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in **Qty Ordered**.
   - **Qty Ordered** is inactive until **Vendor ID** is populated.

14. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in **Qty Received**.
   - **Qty Received** is inactive until **Vendor ID** is populated.
15. If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Manual, type the purchase order number in **PO Number**.
   - If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Automatic, **PO Number** is populated by the system from Generate Inventory (SD.306.00).

16. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in **Unit Cost**.
   - **Unit Cost** defaults according to the costing method of the inventory item in Inventory Items (10.250.00).
   - **Unit Cost** becomes active when **Vendor ID** is associated with the inventory line item.

17. Type a piece of equipment associated with the line item in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click OK, or double-click the ID.

18. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults **Rev Acct** defaults from the inventory item in Inventory Items (10.250.00).

19. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from **Sub Account** in Site Maintenance (SD.025.00).
     - If **Use Sub From Site** is not selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from **Subaccount** in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from **Deferred COGS Subaccount** in Contract Type Maintenance (SN.003.00) unless **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00). If **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00), then **COGS Sub** defaults from **Sub Account** in Site Maintenance (SD.025.00).

20. Click **Save** then **Close** on the toolbar.
Entering Non-Billable Labor Inventory Line Items

To enter non-billable labor inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   
   Invoice - T & M Details (SD.203.00) displays.

2. Select the type of detail for the line item in Line Types.
   - Select Non-Billable from the drop-down list.

3. Type the labor inventory item used to complete the work of a service call in Line Item ID.
   - If the inventory ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct and COGS Acct are populated.

4. Type a different description for the inventory item in the field to the right of Line Item ID.

5. Type the location of the labor inventory item in Inv Location ID.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking Insert on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory locations to the system.

6. Type the warehouse location of the labor inventory item in Whse Loc.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click OK, or double-click the ID.

7. Type the number of hours to be paid to technicians for the work completed on a service call in Worked Hours.
   - Generate Payroll Process (SD.302.00) is used to create a timesheet in Payroll Time and Dollar Entry (02.020.00).

8. Type the employee identifier associated with the technician that performed the work on the service call in Employee ID.
   - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new technicians to the system.
9. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in **Earnings Type Maintenance (02.270.00)** displays.
     - To select an earnings type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Earnings Type List** accesses **Earnings Type Maintenance (02.270.00)**, enabling you to modify information for an existing earnings type.
     - Clicking **Insert** on the **Earnings Type List** accesses **Earnings Type Maintenance (02.270.00)**, enabling you to add new earnings types to the system.
   - **Earnings Type ID** defaults from **Employee Maintenance (SD.007.00)** for the **Employee ID** associated with the detail line.

10. Type the work location associated with the line item in **Work Location**.
    - If the work location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all work locations set up in **Work Location Maintenance (02.280.00)** displays.
      - To select a work location ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Work Location Maintenance List** accesses **Work Location Maintenance (02.280.00)**, enabling you to modify information for an existing work location.
      - Clicking **Insert** on the **Work Location Maintenance List** accesses **Work Location Maintenance (02.280.00)**, enabling you to add new work locations to the system.
    - **Work Location** defaults from **Employee Maintenance (SD.007.00)** for the **Employee ID** associated with the detail line.

11. Type a tax identifier associated with the line item in **Tax ID**.
    - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in **Tax Maintenance (21.280.00)** displays.
      - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Sales Tax List** accesses **Tax Maintenance (21.280.00)**, enabling you to modify information for existing sales taxes.
      - Clicking **Insert** on the **Sales Tax List** accesses **Tax Maintenance (21.280.00)**, enabling you to add new sales taxes to the system.
    - **Tax ID** defaults from **Tax ID** associated with the customer site in **Site Maintenance (SD.025.00)**.
    - **Tax ID** is only enabled for **Billable Line Types**.

    **Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.

12. Type the date the work was performed associated with the line item in **Service Date**.
13. Type the piece of equipment associated with the line item in **Equipment ID**.
    - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in **Equipment Entry (SE.001.00)** of the Equipment Maintenance module displays.
      - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.
14. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in Inventory Items (10.250.00).

15. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Sub Account in Site Maintenance (SD.025.00).
     - If **Use Sub From Site** is not selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00). If **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00), then **COGS Sub** defaults from Sub Account in Site Maintenance (SD.025.00).

16. Click **Save** and then **Close** on the toolbar.

**Entering Project Material Inventory Line Items**

To enter project material inventory line items:
1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click **Details**.
   *Invoice - T & M Details* (SD.203.00) displays.
2. Select the type of detail for the line item in **Line Types**.
   - Select **Project** from the drop-down list.
   - **Project ID** in the Service Contracts module must be populated before selecting **Project**.
3. Type the material inventory item used to complete the work of a service call in Line Item ID.
   - If the inventory ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct, and COGS Acct are populated.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

4. Type a different description for the inventory item in the field to the right of Line Item ID.

5. Type the site of the inventory item where the quantity on hand is reduced by Qty Used in Inv Location ID.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking Insert on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory locations to the system.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

6. Type the warehouse location of the inventory item where the quantity on hand is reduced by Qty Used in Whse Loc.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click OK, or double-click the ID.
   - The quantity available of the inventory item is reduced by the value in Qty Used when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

7. Type the quantity of the inventory item used to perform the work on a service call in Qty Used.
   - Qty Used is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, Allow Negative Quantities on IN Setup (10.950.00) controls the message displayed and options available.
8. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in Lot/Ser Nbr.
   - If the lot/serial number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     - To select a lot/serial number, highlight the ID and click OK, or double-click the ID.
     - Quantity available must be greater than zero to select a lot/serial number.
     - For serial number-controlled items, Qty Used must be 1 (an issue from inventory) or -1 (a return to inventory).
     - For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     - For serial number-controlled items returned to inventory, the serial number must not already exist.

9. Type a tax identifier associated with the detail line item in Tax ID.
   - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
     - To select a tax ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
   - Tax ID defaults from Tax ID associated with the customer site in Site Maintenance (SD.025.00).
   - Tax ID is only enabled for Billable Line Types.

Note: If the inventory item is tax-exempt, Taxable Amount is $0.00.

10. Type the date the work associated with the line item was performed in Service Date.

11. If a purchase order is required for the inventory item, type the vendor ID associated with the line item record in Vendor ID.
   - If the vendor ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in Vendor Maintenance (03.270.00) displays.
     - To select a vendor ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
     - Clicking Insert on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.

12. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in PO Date.
   - PO Date is inactive until Vendor ID is populated.

13. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in Qty Ordered.
   - Qty Ordered is inactive until Vendor ID is populated.

14. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in Qty Received.
   - Qty Received is inactive until Vendor ID is populated.
15. If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Manual, type the purchase order number in PO Number.
   - If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Automatic, PO Number is populated by the system from Generate Inventory (SD.306.00).

16. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in **Unit Cost**.
   - **Unit Cost** defaults according to the costing method of the inventory item in Inventory Items (10.250.00).
   - **Unit Cost** becomes active when **Vendor ID** is associated with the inventory line item.

17. Type a task to associate with the line item in **Task**.
   - If the task ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all tasks set up for the project in Tasks (PA.PRJ.02) of Project Maintenance (PA.PRJ.00) displays.
     - To select a task ID, highlight the ID and click OK, or double-click the ID.

18. Type the piece of equipment associated with the line item in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click OK, or double-click the ID.

19. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
   - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
   - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in Inventory Items (10.250.00).

20. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
   - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
   - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If Use Sub From Site is selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Sub Account in Site Maintenance (SD.025.00).
     - If Use Sub From Site is not selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Subaccount in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00). If Use Subaccount From Site is selected in Contract Type
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Maintenance (SN.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).

21. Click Save on the toolbar.
22. Click Close on the toolbar.

**Entering Project Labor Inventory Line Items**

To enter project labor inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.
   *Invoice - T & M Details* (SD.203.00) displays.

2. Select the type of detail for the line item in Line Types.
   - Select Project from the drop-down list.

3. Type the labor inventory items that complete the work of a service call in Line Item ID.
   - If the inventory ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct, and COGS Acct are populated.

4. Type a different description for the inventory item in the field to the right of Line Item ID.

5. Type the site of the labor inventory item in Invt Location ID.
   - If the inventory location ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking Insert on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory locations to the system.

6. Type the warehouse location of the labor inventory item in Whse Loc.
   - If the warehouse location ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click OK, or double-click the ID.

7. Type the number of hours to be paid to technicians for the work completed on a service call in Worked Hours.
   - Generate Payroll Process (SD.302.00) is used to create a timesheet in Payroll Time and Dollar Entry (02.020.00).

8. Type the employee identifier associated with the technician that performed the work on the service call in Employee ID.
   - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.
Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance (SD.007.00)**, enabling you to add new technicians to the system.

9. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in **Earnings Type Maintenance (02.270.00)** in the Payroll module displays.
     - To select an earnings type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Earnings Type List** accesses **Earnings Type Maintenance (02.270.00)**, enabling you to modify information for an existing earnings type.
   - Clicking **Insert** on the **Earnings Type List** accesses **Earnings Type Maintenance (02.270.00)**, enabling you to add new earnings types to the system.
   - **Earnings Type ID** defaults from **Employee Maintenance (SD.007.00)** for the **Employee ID** associated with the detail line.

10. Type the work location associated with the line item in **Work Location**.
   - If the work location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all work locations set up in **Work Location Maintenance (02.280.00)** displays.
     - To select a work location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Work Location Maintenance List** accesses **Work Location Maintenance (02.280.00)**, enabling you to modify information for an existing work location.
     - Clicking **Insert** on the **Work Location Maintenance List** accesses **Work Location Maintenance (02.280.00)**, enabling you to add new work locations to the system.
   - **Work Location** defaults from **Employee Maintenance (SD.007.00)** for the **Employee ID** associated with the detail line.

11. Type a tax identifier associated with the line item in **Tax ID**.
   - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in **Tax Maintenance (21.280.00)** displays.
     - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Sales Tax List** accesses **Tax Maintenance (21.280.00)**, enabling you to modify information for existing sales taxes.
     - Clicking **Insert** on the **Sales Tax List** accesses **Tax Maintenance (21.280.00)**, enabling you to add new sales taxes to the system.
   - **Tax ID** defaults from **Tax ID** associated with the customer site in **Site Maintenance (SD.025.00)**.
   - Tax ID is only enabled for Billable **Line Types**.

   **Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.

12. Type the date the work associated with the line item was performed in **Service Date**.

13. Type a task to associate with the line item in **Task**.
   - If the task ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all tasks set up for the project in **Tasks (PA.PRJ.02) of Project Maintenance (PA.PRJ.00)** displays.
     - To select a task ID, highlight the ID and click **OK**, or double-click the ID.
14. Type a piece of equipment to associate with the line item in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in **Equipment Entry (SE.001.00)** of the Equipment Maintenance module displays.
   - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.

**Note:** The project is associated with the Service Contracts module.

15. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in **Account Maintenance (01.260.00)** displays.
     - To select an account number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Account List** accesses **Account Maintenance (01.260.00)**, enabling you to modify information for an existing account number.
     - Clicking **Insert** on the **Active Account List** accesses **Account Maintenance (01.260.00)**, enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in **Inventory Items (10.250.00)**.

16. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in **Subaccount Maintenance (01.270.00)** displays.
     - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Active Subaccount List** accesses **Subaccount Maintenance (01.270.00)**, enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the **Active Subaccount List** accesses **Subaccount Maintenance (01.270.00)**, enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in **Call Type Maintenance (SD.003.00)**, then **COGS Sub** defaults from **Sub Account** in **Site Maintenance (SD.025.00)**.
     - If **Use Sub From Site** is not selected in **Call Type Maintenance (SD.003.00)**, then **COGS Sub** defaults from **Subaccount** in **Call Type Maintenance (SD.003.00)**.
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from **Deferred COGS Subaccount** in **Contract Type Maintenance (SN.003.00)** unless **Use Subaccount From Site** is selected in **Contract Type Maintenance (SN.003.00)**. If **Use Subaccount From Site** is selected in **Contract Type Maintenance (SN.003.00)**, then **COGS Sub** defaults from **Sub Account** in **Site Maintenance (SD.025.00)**.

17. Click **Save** on the toolbar.

18. Click **Close** on the toolbar.

**Entering Service Contract Material Inventory Line Items**

To enter service contract material inventory line items:

1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click **Details. Invoice - T & M Details (SD.203.00)** displays.
2. Select the type of detail for the line item in **Line Types**.

   - **Select Svc Contract** from the drop-down list.

   **Note**: Unlike **Project**, **Contract ID** does not need to be populated. For example, a technician may complete the service call without realizing that the work is covered under a service contract.

3. Type the material inventory item used to complete the work of a service call in **Line Item ID**.

   - If the inventory ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in **Inventory Items** (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to add new inventory items to the system.

   - Once **Line Item ID** is populated, the description of the inventory item to the right of **Line Item ID**, **Detail Type**, **Class**, **Base Price**, **Unit Price**, **Tax ID**, **Unit Cost**, **Rev Acct**, and **COGS Acct** are populated.

   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

4. Type a different description for the inventory item in the field to the right of **Line Item ID**.

5. Type the site of the inventory item where the quantity on hand is reduced by **Quantity Used** in **Inv Location ID**.

   - If the inventory location ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in **Sites** (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to add new inventory locations to the system.

   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

6. Type the warehouse location of the inventory item where the quantity on hand is reduced by **Qty Used** in **Whse Loc**.

   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in **Warehouse Bin Locations** (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click **OK**, or double-click the ID.

   - The quantity available of the inventory item is reduced by the value in **Qty Used** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.

7. Type the quantity of the inventory item used to perform the work on a service call in **Qty Used**.

   - **Qty Used** is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, **Allow Negative Quantities** on **IN Setup** (10.950.00) controls the message displayed and options available.
8. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in Lot/Ser Nbr.
   • If the lot/serial number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     – To select a lot/serial number, highlight the ID and click OK, or double-click the ID.
     – Quantity available must be greater than zero to select a lot/serial number.
     – For serial number-controlled items, Qty Used must be 1 (an issue from inventory) or -1 (a return to inventory).
     – For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     – For serial number-controlled items returned to inventory, the serial number must not already exist.

9. Type a tax identifier associated with the detail line item in Tax ID.
   • If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
     – To select a tax ID, highlight the ID and click OK, or double-click the ID.
     – Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     – Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
   • Tax ID defaults from Tax ID associated with the customer site in Site Maintenance (SD.025.00).
   • Tax ID is only enabled for Billable Line Types.

Note: If the inventory item is tax-exempt, Taxable Amount is $0.00.

10. Type the date the work associated with the line item was performed in Service Date.

11. If a purchase order is required for the inventory item, type the vendor identifier associated with the line item record in Vendor ID.
    • If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in Vendor Maintenance (03.270.00) displays.
      – To select a vendor ID, highlight the ID and click OK, or double-click the ID.
      – Clicking Edit on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
      – Clicking Insert on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.

12. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in PO Date.
    • PO Date is inactive until Vendor ID is populated.

13. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in Qty Ordered.
    • Qty Ordered is inactive until Vendor ID is populated.

14. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in Qty Received.
    • Qty Received is inactive until Vendor ID is populated.
15. If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Manual, type the purchase order number in **PO Number**.
   - If **PO Number Option** in Service Series Setup Maintenance (SD.000.00) is Automatic, **PO Number** is populated by the system from Generate Inventory (SD.306.00).

16. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in **Unit Cost**.
   - **Unit Cost** defaults according to the costing method of the inventory item in Inventory Items (10.250.00).
   - **Unit Cost** becomes active when **Vendor ID** is associated with the inventory line item.

17. Type a service contract to associate with the line item in **Contract ID**.
   - If the service contract ID is unknown, press F3 or double-click the right mouse button. A list of all service contracts set up in Service Call Entry (SN.001.00) of the Service Contract module displays.
     - To select a service call ID, highlight the ID and click **OK**, or double-click the ID.

18. Type the piece of equipment identifier associated with the line item in **Equipment ID**.
   - If the equipment ID is unknown, press F3 or double-click the right mouse button. A list of all equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.

19. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in Inventory Items (10.250.00).

20. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Sub Account in Site Maintenance (SD.025.00).
     - If **Use Sub From Site** is not selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from Subaccount in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00). If **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00), then **COGS Sub** defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00).
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Maintenance (SN.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).

21. Click Save on the toolbar.
22. Click Close on the toolbar.

Entering Service Contract Labor Inventory Line Items

To enter service contract labor inventory line items:
1. After entering basic invoice information (see “Entering Invoice Information” on page 219), click Details.

   Invoice - T & M Details (SD.203.00) displays.
2. Select the type of detail for the line item in Line Types.
   - Select Svc Contract from the drop-down list.
   
   Note: Unlike Project, Contract ID does not need to be populated. For example, a technician may complete the service call without realizing that the work is covered under a service contract.

3. Type the labor inventory item used to complete the service call in Line Item ID.
   - If the inventory ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking Insert on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once Line Item ID is populated, the description of the inventory item to the right of Line Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Rev Acct, and COGS Acct are populated.

4. Type a different description for the inventory item in the field to the right of Line Item ID.

5. Type the site of the labor inventory item in Invt Location ID.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Inventory Location List accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking Insert on the Inventory Location List accesses Sites (10.310.00), enabling you to add new inventory locations to the system.

6. Type the warehouse location of the labor inventory item in Whse Loc.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in Warehouse Bin Locations (10.340.00) displays.
     - To select a warehouse location ID, highlight the ID and click OK, or double-click the ID.

7. Type the number of hours to be paid to technicians for the work completed on a service call in Worked Hours.
   - Generate Payroll Process (SD.302.00) is used to create a timesheet in Payroll Time and Dollar Entry (02.020.00).
8. Type the employee identifier associated with the technician that performed the work on the service call in **Employee ID**.
   - If the technician ID must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all technicians set up in **Employee Maintenance** (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new technicians to the system.

9. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type ID must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all earnings types set up in **Earnings Type Maintenance** (02.270.00) displays.
     - To select an earnings type ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Earnings Type List** accesses **Earnings Type Maintenance** (02.270.00), enabling you to modify information for an existing earnings type.
     - Clicking **Insert** on the **Earnings Type List** accesses **Earnings Type Maintenance** (02.270.00), enabling you to add new earnings types to the system.
   - **Earnings Type ID** defaults from **Employee Maintenance** (SD.007.00) for the **Employee ID** associated with the detail line.

10. Type the work location associated with the line item in **Work Location**.
    - If the work location ID must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all work locations set up in **Work Location Maintenance** (02.280.00) displays.
      - To select a work location ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Work Location Maintenance List** accesses **Work Location Maintenance** (02.280.00), enabling you to modify information for an existing work location.
      - Clicking **Insert** on the **Work Location Maintenance List** accesses **Work Location Maintenance** (02.280.00), enabling you to add new work locations to the system.
    - **Work Location** defaults from **Employee Maintenance** (SD.007.00) for the **Employee ID** associated with the detail line.

11. Type a tax identifier associated with the line item in **Tax ID**.
    - If the tax ID must be changed or the ID is unknown, press **F3** or double-click the right mouse button. A list of all taxes set up in **Tax Maintenance** (21.280.00) displays.
      - To select a tax ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to modify information for existing sales taxes.
      - Clicking **Insert** on the **Sales Tax List** accesses **Tax Maintenance** (21.280.00), enabling you to add new sales taxes to the system.
    - **Tax ID** defaults from **Tax ID** associated with the customer site in **Site Maintenance** (SD.025.00).
    - **Tax ID** is only enabled for Billable **Line Types**.

**Note:** If the inventory item is tax-exempt, **Taxable Amount** is $0.00.

12. Type the date the work associated with the line item was performed in **Service Date**.
13. Type a service contract to associate with the line item in **Contract ID**.
   - If the service contract ID is unknown, press F3 or double-click the right mouse button. A list of all service contracts set up in Service Call Entry (SN.001.00) of the Service Contract module displays.
     - To select a service call ID, highlight the ID and click **OK**, or double-click the ID.
14. Type the piece of equipment associated with the line item in **Equipment ID**.
   - If the equipment ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all the equipment set up in Equipment Entry (SE.001.00) of the Equipment Maintenance module displays.
     - To select a piece of equipment, highlight the ID and click **OK**, or double-click the ID.
15. Type the cost of goods account associated with the inventory line item in **COGS Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **COGS Acct** defaults from the inventory item in **Inventory Items** (10.250.00).
16. Type the cost of goods subaccount associated with the inventory line item in **COGS Sub**.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - **COGS Sub** defaults from several places:
     - If **Use Sub From Site** is selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from **Sub Account** in Site Maintenance (SD.025.00).
     - If **Use Sub From Site** is not selected in Call Type Maintenance (SD.003.00), then **COGS Sub** defaults from **Subaccount** in **Call Type Maintenance** (SD.003.00).
     - If a contract ID is associated with the detail line item, then **COGS Sub** defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00). If **Use Subaccount From Site** is selected in Contract Type Maintenance (SN.003.00), then **COGS Sub** defaults from **Sub Account** in Site Maintenance (SD.025.00).
17. Click **Save** on the toolbar.
18. Click **Close** on the toolbar.

**Note:** Service Contract Profitability (SN.013.00) is not updated until you run the service call invoice.
Flat Rate Price Invoicing

Flat rates are used to combine both material and labor detail line items that are billable to customers at one price. Therefore detail line items are not required when creating invoices.

Entering a Flat Rate Price Invoice

To enter a flat rate price invoice:

1. **Open Invoice Entry (SD.202.00) by choosing Module | Service Dispatch | Invoice Entry from the menu.**

   *Invoice Entry (SD.202.00) displays.*

   - *Note: Invoice Entry (SD.202.00) can be accessed by clicking Invoice in Service Call Entry (SD.200.00), by clicking Invoice in Dispatch (SD.201.00).*

2. **Type the identifier of the service call in Service Call ID to be invoiced.**

   - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in Service Call Entry (SD.200.00) displays.
     - To select a service call ID, highlight the ID and click OK, or double-click the ID.

   - *Note: Service Call ID is already populated if you access Invoice Entry (SD.202.00) via an alternative method.*

   - *Note: Once the Service Call ID is entered, the Customer ID, Customer Site and Branch ID associated with the service call will be populated.*

3. **Choose the type of invoice detail for the service call in Service Type.**

   - Select Flat Rate from the drop-down list.

   - *Note: Flat Rate Pricing is a separate service management module in Field Service Management that allows users to create an unlimited number of user-defined flat rates that include all of the material, labor and overhead costs needed to complete a job or service call.*

4. **Choose how the invoice number will be assigned for the invoice in Invoice Type.**

   - **Invoice:** Assigned to a service call after the service call invoices are printed and saved to the system through Service Invoice Printing - Keep/Delete (SD.642.00).
   - **Manual:** Requires that a user-specified invoice number be typed into Invoice/Memo Nbr before the invoice information can be saved to the system in Invoice Entry (SD.202.00).
   - **Progress:** Allows users to invoice customers for material and labor used to perform the work without closing the service call. Therefore, additional work and detail lines items can be added to the service call for invoicing.

5. **If the Invoice Type is Manual, type a date the work on the service call is complete in Completed Date.**

   - *Note: If the Invoice Type is Invoice, the date the invoice is printed and processed in the system defaults to Completed Date. If the Invoice Type is Progress, no value is entered in Completed Date because the service call is not closed during the invoice printing process.*

6. **Type the accounts receivable aging date for the invoice in Invoice Date.**

7. **If the Invoice Type is Manual, type an invoice number for the invoice in Invoice/Memo Nbr.**

   - *Note: If the Invoice Type is Invoice or Progress, Invoice/Memo Nbr is inactive.*

8. **Type a work order number associated with the service call in Workorder Nbr.**

   - **Workorder Nbr** may be printed on the customer invoice.
9. Type the salesperson associated with the customer site of the service call in **Salesperson ID**.
   - **Salesperson ID** defaults from **Site Maintenance** (SD.025.00).
   - If the salesperson must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all salespersons set up in **Salesperson Maintenance** (08.310.00) displays.
     - To select a salesperson ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Salesperson List** accesses **Salesperson Maintenance** (08.310.00), enabling you to modify information for existing salespersons.
     - Clicking **Insert** on the **Salesperson List** accesses **Salesperson Maintenance** (08.310.00), enabling you to add new salespersons to the system.

10. Type the technician that performed the work of the service call in **Primary Tech**.
    - **Primary Tech** defaults from **Dispatch** (SD.201.00).
    - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in **Employee Maintenance** (SD.007.00) displays.
      - To select a technician ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00) and allows users to modify information for a technician.
      - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new technicians to the system.

11. Type the period the invoice updates the Accounts Receivable and General Ledger modules in **Period to Post**.
    - **Period to Post** is important when selecting service calls to be invoiced in **Service Invoice Selection** (SD.641.00). Only invoices that have a **Period to Post** in **Invoice Entry** (SD.202.00) that matches the **Period to Post** in **Service Invoice Selection** (SD.641.00) are selected for invoicing.

12. Type a terms to associate with the invoice in **Terms ID**.
    - **Terms ID** defaults from **Customer Maintenance** (08.260.00).
    - If the terms ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all terms set up in **Terms Maintenance** (21.270.00) displays.
      - To select a terms ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Terms Maintenance List** accesses **Terms Maintenance** (21.270.00), enabling you to modify information for existing terms.
      - Clicking **Insert** on the **Terms Maintenance List** accesses **Terms Maintenance** (21.270.00), enabling you to add new terms to the system.
    - **Terms ID** is for informational purposes only.

Note: Terms are used to create **Due Date** and **Discount Date** of an invoice in **Invoice & Memo** (08.010.00) when a service call invoice is printed in **Service Call Invoice** (SD.640.00) or **Service Call Invoice (SSRS)** (SD.643.00) and processed in **Service Invoice Printing - Keep/Delete** (SD.642.00). **Due Date** and **Discount Date** of an invoice are based on **Invoice Date** and **Terms ID** of the invoice.

Note: Multiple installment terms have no effect on Field Service Management modules. Multiple installment terms are processed when the batch of invoices is released in **Invoice & Memo** (08.010.00).
13. If the work of a service call is covered under a manufacturer or in-house warranty, and the manufacturer must be invoiced for the material and labor costs, type the customer ID of the manufacturer in Alt Cust ID.
   - If the customer ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active customers set up in Customer Maintenance (08.260.00) displays.
     - To select a customer ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Customer Maintenance List accesses Customer Maintenance (08.260.00), enabling you to modify information for existing customer.
     - Clicking Insert on the Customer Maintenance List accesses Customer Maintenance (08.260.00), enabling you to add new customers to the system.

14. If the service call is a “call back,” type the ID of the original service call in Orig Call Nbr.

15. Type a 30-character explanation of the service call invoice in Description.
   - Description is for informational purposes only.

Note: The remaining steps are optional; they are for informational purposes only.

16. Click the Other Info tab or press ALT+O.
   - The Other Info tab displays.
   Additional information may be entered into the Other Info tab; however, all the fields on this tab are optional. They are for informational purposes only.

17. Type a different call status associated with the service call in Call Status.
   - If the call status must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call statuses set up in Call Status Maintenance (SD.002.00) displays.
     - To select a branch ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.003.00), enabling you to modify information for an existing call status.
     - Clicking Insert on the Call Status Maintenance PV List accesses Call Status Maintenance (SD.003.00), enabling you to add new call statuses to the system.
   - Call Status defaults from Service Call Entry (SD.200.00).

18. Type a different call type associated with a service call in Call Type.
   - Call Type defaults from Service Call Entry (SD.200.00).
   - If the call type ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in Call Type Maintenance (SD.003.00) displays.
     - To select a call type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to modify information for an existing call type.
     - Clicking Insert on the Call Type Maintenance PV List accesses Call Type Maintenance (SD.003.00), enabling you to add new call types to the system.

19. Type a different name for the person who requested the service call in Caller Name.
   - Caller Name defaults from Service Call Entry (SD.200.00).

20. Type a different purchase order number associated with the service call Customer PO.
   - Customer PO defaults from Service Call Entry (SD.200.00).
21. Choose a payment method for the service invoice in **Payment Method**.

- American Express
- Cash
- Check
- Discover
- In-house Charge
- MasterCard
- Visa

**Note:** **Payment Method** is for informational purposes only.

22. If the **Payment Method** is check or a credit card, type the check or credit card number in **Check/Card Nbr**.

- **Check/Card Nbr** is for informational purposes only.

23. If the **Payment Method** is credit card, type the credit card expiration number in **Exp Date**.

- **Exp Date** is for informational purposes only.

24. Type the name of the user entering the invoice in **Processed By**.

25. Type the date the invoice is being entered into the system in **Processed Date**.

26. Type the name of the user who reviewed the invoice for accuracy in **Reviewed By**.

**Invoicing a Flat Rate Order**

1. Click **Details**. **Invoice - Flat Rate Order (SP.200.00)** displays.

![Figure 112: Invoice - Flat Rate Order (SP.200.00)](image)
2. Type a flat rate identifier associated with the service call in **Flat Rate ID**.
   - Multiple **Flat Rate Prices** can be attached to a service call.
   - If the flat rate ID must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all flat rate prices set up in Flat Rate Entry (SP.000.00) displays.
     - To select a flat rate ID, highlight the ID and click **OK** call status, or double-click the ID.
     - Clicking **Edit** on the **Flat Rate Maintenance PV List** accesses Flat Rate Entry (SP.000.00), enabling you to modify information for an existing flat rate.
     - Clicking **Insert** on the **Flat Rate Maintenance PV List** accesses Flat Rate Entry (SP.000.00), enabling you to add new flat rates to the system.

3. Type the site location of the inventory item where the quantity on hand is reduced in **Invt Loc ID**.
   - If the inventory location ID must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses Sites (10.310.00), enabling you to modify information for an inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses Sites (10.310.00), enabling you to add new inventory locations to the system.

4. Type the pricing plan identifier associated with the service call in **Pricing Plan ID**.
   - If the pricing plan ID must be changed or the ID is unknown, press `F3` or double-click the right mouse button. A list of all pricing plans set up in Flat Rate Pricing Plan Maintenance (SP.000.00) displays.
     - To select a pricing plan ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Plan Maintenance PV List** accesses Flat Rate Pricing Plan Maintenance (SP.000.00), enabling you to modify information for an existing pricing plan.
     - Clicking **Insert** on the **Plan Maintenance PV List** accesses Flat Rate Pricing Plan Maintenance (SP.000.00), enabling you to add new pricing plans to the system.
Modifying Details of a Flat Rate Order

*Flat Rate Order - Modify Detail (SP.202.00)* allows users to view and modify the line item details of a flat rate without changing the price.

**To view or add material inventory items for a flat rate price invoice:**

Click *Task Detail*. *Flat Rate Order - Modify Detail (SP.202.00)* displays.

*Figure 11.3: Flat Rate Order - Modify Detail (SP.202.00)*
Entering Material Inventory Line Items

1. On Invoice – Flat Rate Order (SP.200.00), click **Task Detail**.
2. Type a different material inventory item used to complete the work of a service call in **Item ID**.
   - If the inventory ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in **Inventory Items** (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the **Inventory Item List** accesses **Inventory Items** (10.250.00), enabling you to add new inventory items to the system.
   - Once **Item ID** is populated, the description of the inventory item to the right of **Item ID, Detail Type, Class, Base Price, Unit Price, Tax ID, Unit Cost, Revenue Acct, and COGS Acct** are populated.
   - The quantity available of the inventory item is reduced by the value in **Quantity** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.
3. Type a different description for the inventory item in the field to the right of **Item ID**.
4. Type a different site of the inventory item where the quantity on hand is reduced by **Quantity** in **Inv Location ID**.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in **Sites** (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses **Sites** (10.310.00), enabling you to add new inventory locations to the system.
   - The quantity available of the inventory item is reduced by the value in **Quantity** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.
5. Type the warehouse location of the inventory item where the quantity on hand is reduced by **Quantity** in **Whse Loc**.
   - If the warehouse location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all warehouse locations set up in **Warehouse Bin Locations** (10.340.00) is displayed.
     - To select a warehouse location ID, highlight the ID and click **OK**, or double-click the ID.
   - The quantity available of the inventory item is reduced by the value in **Quantity** when the invoice is saved. This allocation remains until the invoice is cancelled or until the resulting inventory transaction is processed to reduce quantity on hand.
6. Type a different quantity of the inventory item used to perform the work on a service call in **Quantity**.
   - **Quantity** is compared to the quantity available in the Inventory module. When a quantity greater than the quantity available is entered, **Allow Negative Quantities** on **IN Setup** (10.950.00) controls the message displayed and options available.
7. If the inventory item used to complete the work on a service call is serialized, type the serial number of the inventory item in Lot/Ser Nbr.
   - If the lot/serial number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all lot/serial numbers received for the inventory item displays.
     - To select a lot/serial number, highlight the ID and click OK, or double-click the ID.
     - Quantity available must be greater than zero to select a lot/serial number.
     - For serial number-controlled items, Quantity must be 1 (an issue from inventory) or -1 (a return to inventory).
     - For serial number-controlled items issued from inventory, each instance of the item on the grid must have a unique serial number.
     - For serial number-controlled items returned to inventory, the serial number must not already exist.

8. Type a different price of the inventory item used to perform the work on a service call in Unit Price.

9. Select if the inventory item is taxable in Tax Exempt.
   - No
   - Yes

10. If the inventory item is taxable, type a tax identifier associated with the detail line item in Tax ID.
    - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
      - To select a tax ID, highlight the ID and click OK, or double-click the ID.
      - Clicking Edit on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
      - Clicking Insert on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
    - Tax ID defaults from Tax ID associated with the customer site in Site Maintenance (SD.025.00).
    - Tax ID is only enabled for Billable Line Types.

    Note: If the inventory item is tax-exempt, Txbl Amount is $0.00.

11. Type the date the work associated with the line item was performed in Service Date.

12. If a purchase order is required for the inventory item, type the vendor ID associated with the line item record in Vendor ID.
    - If the vendor ID is unknown, press F3 or double-click the right mouse button. A list of all active vendors set up in Vendor Maintenance (03.270.00) displays.
      - To select a vendor ID, highlight the ID and click OK, or double-click the ID.
      - Clicking Edit on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to modify information for an existing vendor.
      - Clicking Insert on the Vendor List accesses Vendor Maintenance (03.270.00), enabling you to add new vendors to the system.

13. If a purchase order is required for the inventory item, type the purchase order date associated with the line item record in PO Date.
    - PO Date is inactive until Vendor ID is populated.

14. If a purchase order is required for the inventory item, type the quantity ordered for a specific item that was purchased on a purchase order in Qty Purch.
    - Qty Purch is inactive until Vendor ID is populated.
15. If a purchase order receipt is required for the inventory item, type the quantity received for a specific item that was used in Qty Received.
   - Qty Received is inactive until Vendor ID is populated.
16. If a purchase order is required for the inventory item, type the cost of the inventory item associated with the line item record in Unit Cost.
17. Type the revenue account associated with the inventory line item in Revenue Acct.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account number set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking Insert on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - Revenue Acct defaults from the inventory item in Inventory Items (10.250.00).
18. Type the revenue subaccount associated with the inventory line item in Revenue Sub.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount number set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking Insert on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.
   - Revenue Sub defaults from several places:
     - If Use Sub From Site is selected in Call Type Maintenance (SD.003.00), then Revenue Sub defaults from Sub Account in Site Maintenance (SD.025.00).
     - If Use Sub From Site is not selected in Call Type Maintenance (SD.003.00), then Revenue Sub defaults from Subaccount in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then Revenue Sub defaults from Deferred Revenue Subaccount in Contract Type Maintenance (SN.003.00) unless Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00). If Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00), then Revenue Sub defaults from Sub Account in Site Maintenance (SD.025.00).
19. Type the cost of goods account associated with the inventory line item in COGS Acct.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking Insert on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - COGS Acct defaults from the inventory item in Inventory Items (10.250.00).
20. Type the cost of goods subaccount associated with the inventory line item in COGS Sub.
   - If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
     - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
     - Clicking **Insert** on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.

   - COGS Sub defaults from several places:
     - If Use Sub From Site is selected in Call Type Maintenance (SD.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).
     - If Use Sub From Site is not selected in Call Type Maintenance (SD.003.00), then COGS Sub defaults from Subaccount in Call Type Maintenance (SD.003.00).
     - If a contract ID is associated with the detail line item, then COGS Sub defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00). If Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).

21. When you are finished viewing or adding invoice details, click OK.
   - Invoice - Flat Rate Order (SP.200.00) displays.

22. Click OK to close Invoice - Flat Rate Order (SP.200.00).
   - Invoice Entry (SD.202.00) displays.

23. Choose Approved for Handling.

   **Note:** Handling must be set to Approved in order to select the service call to be invoiced in Service Invoice Selection (SD.641.00).

24. Click Save to save changes to the current invoice; click Finish to enter the next invoice.

### Entering Labor Inventory Line Items

**To enter labor inventory line items:**

1. On Invoice - Flat Rate Order (SP.200.00), click Task Detail.
   - Flat Rate Order - Modify Detail (SP.202.00) displays.

2. Type a different labor inventory item used to complete the work of a service call in **Item ID**.
   - If the inventory ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory items set up in Inventory Items (10.250.00) displays.
     - To select an inventory ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to modify information for an existing inventory item.
     - Clicking **Insert** on the Inventory Item List accesses Inventory Items (10.250.00), enabling you to add new inventory items to the system.
   - Once **Item ID** is populated, the description of the inventory item to the right of **Item ID**. **Detail Type**, **Class**, **Base Price**, **Unit Price**, **Tax ID**, **Unit Cost**, **Revenue Acct.** and **COGS Acct** are populated.

3. Type a different description for the inventory item in the field to the right of **Line Item ID**.
4. Type the site of the labor inventory item in **Invt Location ID**.
   - If the inventory location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all inventory locations set up in Sites (10.310.00) displays.
     - To select an inventory location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Inventory Location List** accesses Sites (10.310.00), enabling you to modify information for an existing inventory location.
     - Clicking **Insert** on the **Inventory Location List** accesses Sites (10.310.00), enabling you to add new inventory locations to the system.

5. Type a different number of hours to be paid to technicians for the work completed on a service call in **Worked Hours**.
   - **Generate Payroll Process** (SD.302.00) is used to create a timesheet in **Payroll Time and Dollar Entry** (02.020.00).

6. Type the number of hours to be charged to the customer in **Billed Hrs**.
   - **Note**: Flat Rate Pricing is always billable to the customer associated with the service call.
   - When service call invoices are processed in **Service Invoice Printing - Keep/Delete** (SD.642.00), a batch is created in **Invoice and Memo** (08.010.00) in the Accounts Receivable module.

7. Type a different price of the inventory item used to perform the work on a service call in **Unit Price**.

8. Type the employee identifier associated with the technician that performed the work on the service call in **Employee ID**.
   - If the technician ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in **Employee Maintenance** (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking **Insert** on the **Employee Maintenance PV List** accesses **Employee Maintenance** (SD.007.00), enabling you to add new technicians to the system.

9. Type the earnings type associated with the line item record in **Earnings Type ID**.
   - If the earnings type ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all earning types set up in **Earnings Type Maintenance** (02.270.00) in the Payroll module displays.
     - To select an earnings type ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the **Earnings Type List** accesses **Earnings Type Maintenance** (02.270.00), enabling you to modify information for an existing earnings type.
     - Clicking **Insert** on the **Earnings Type List** accesses **Earnings Type Maintenance** (02.270.00), enabling you to add new earnings type to the system.
   - **Earnings Type ID** defaults from **Employee Maintenance** (SD.007.00) for the **Employee ID** associated with the detail line.
10. Type the work location associated with the line item in **Work Location**.
   - If the work location ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all work locations set up in Work Location Maintenance (02.280.00) displays.
     - To select a work location ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Work Location Maintenance List accesses Work Location Maintenance (02.280.00), enabling you to modify information for an existing work location.
     - Clicking **Insert** on the Work Location Maintenance List accesses Work Location Maintenance (02.280.00), enabling you to add new work locations to the system.
   - **Work Location** defaults from Employee Maintenance (SD.007.00) for the Employee ID associated with the detail line.

11. Select if the inventory item is taxable in **Tax Exempt**.
   - No
   - Yes

12. If the inventory item is taxable, type a tax identifier associated with the line item in **Tax ID**.
   - If the tax ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all taxes set up in Tax Maintenance (21.280.00) displays.
     - To select a tax ID, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to modify information for existing sales taxes.
     - Clicking **Insert** on the Sales Tax List accesses Tax Maintenance (21.280.00), enabling you to add new sales taxes to the system.
   - **Tax ID** defaults from Tax ID associated with the customer site in Site Maintenance (SD.025.00).
   - Tax ID is only enabled for Billable Line Types.

   **Note:** If the inventory item is tax-exempt, **Txbl Amount** is $0.00.

13. Type the date the work associated with the line item was performed in **Service Date**.

14. Type the revenue account associated with the inventory line item in **Revenue Acct**.
   - If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account number set up in Account Maintenance (01.260.00) displays.
     - To select an account number, highlight the ID and click OK, or double-click the ID.
     - Clicking **Edit** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
     - Clicking **Insert** on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.
   - **Revenue Acct** defaults from the inventory item in Inventory Items (10.250.00).
15. Type the revenue subaccount associated with the inventory line item in Revenue Sub.

- If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount number set up in Subaccount Maintenance (01.270.00) displays.
  - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
  - Clicking Insert on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.

- Revenue Sub defaults from several places:
  - If Use Sub From Site is selected in Call Type Maintenance (SD.003.00), then Revenue Sub defaults from Sub Account in Site Maintenance (SD.025.00).
  - If Use Sub From Site is not selected in Call Type Maintenance (SD.003.00), then Revenue Sub defaults from Subaccount in Call Type Maintenance (SD.003.00).
  - If a contract ID is associated with the detail line item, then Revenue Sub defaults from Deferred Revenue Subaccount in Contract Type Maintenance (SN.003.00) unless Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00). If Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00), then Revenue Sub defaults from Sub Account in Site Maintenance (SD.025.00).

16. Type the cost of goods account associated with the inventory line item in COGS Acct.

- If the account number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active account numbers set up in Account Maintenance (01.260.00) displays.
  - To select an account number, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Active Account List accesses Account Maintenance (01.260.00), enabling you to modify information for an existing account number.
  - Clicking Insert on the Active Account List accesses Account Maintenance (01.260.00), enabling you to add new account numbers to the system.

- COGS Acct defaults from the inventory item in Inventory Items (10.250.00).

17. Type the cost of goods subaccount associated with the inventory line item in COGS Sub.

- If the subaccount number must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active subaccount numbers set up in Subaccount Maintenance (01.270.00) displays.
  - To select a subaccount number, highlight the ID and click OK, or double-click the ID.
  - Clicking Edit on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to modify information for an existing subaccount number.
  - Clicking Insert on the Active Subaccount List accesses Subaccount Maintenance (01.270.00), enabling you to add new subaccount numbers to the system.

- COGS Sub defaults from several places:
  - If Use Sub From Site is selected in Call Type Maintenance (SD.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).
  - If Use Sub From Site is not selected in Call Type Maintenance (SD.003.00), then COGS Sub defaults from Subaccount in Call Type Maintenance (SD.003.00).
  - If a contract ID is associated with the detail line item, then COGS Sub defaults from Deferred COGS Subaccount in Contract Type Maintenance (SN.003.00) unless Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00).
(SN.003.00). If Use Subaccount From Site is selected in Contract Type Maintenance (SN.003.00), then COGS Sub defaults from Sub Account in Site Maintenance (SD.025.00).

18. Click OK to close Flat Rate Order - Modify Detail (SP.202.00).
   - Invoice - Flat Rate Order (SP.200.00) displays.
19. Click OK to close Invoice - Flat Rate Order (SP.200.00)
   - Invoice Entry (SD.202.00) displays.
20. Click OK to close Invoice Entry (SD.202.00).

**Entering Technician Information on an Invoice**

*Invoice - Technician Information* (SD.028.00) allows users to associate multiple technicians to an invoice. This screen also allows users to enter vehicle information assigned to the technicians such as the Vehicle ID and Ending Mileage to track usage for preventive maintenance.

**To enter technician information:**

1. Open Invoice Entry (SD.202.00) by choosing Module | Service Dispatch | Invoice Entry from the menu.

   Invoice Entry (SD.202.00) displays.

   **Note:** Invoice Entry (SD.202.00) can be accessed by clicking Invoice in Service Call Entry (SD.200.00), by clicking Invoice in Dispatch (SD.201.00).

2. Click Technician. Invoice - Technician Information (SD.028.00) displays.

   ![Invoice - Technician Information (SD.028.00)](image)

   **Figure 114: Invoice - Technician Information (SD.028.00)**

3. If other technicians besides the primary technician performed work on the service call, type the additional technicians in Technician ID.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new technicians to the system.
4. Type the vehicle assigned to the technician that performed work on the service in **Vehicle ID**.
   - If the technician was assigned as the primary service technician, the vehicle assigned to the technician in *Employee Personal Information* (SD.007.01) of *Employee Maintenance* (SD.007.00) defaults automatically.
   - If the vehicle ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all vehicles set up in *Vehicle Maintenance* (SD.020.00) displays.
     - To select a vehicle ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Vehicle Maintenance PV List** accesses *Vehicle Maintenance* (SD.020.00), enabling you to modify information for an existing vehicle.
     - Clicking **Insert** on the **Vehicle Maintenance PV List** accesses *Vehicle Maintenance* (SD.020.00), enabling you to add new vehicles to the system.

5. Type the ending odometer mileage of the vehicle assigned to the technician in **Ending Mileage**.
   - **Ending Mileage** is for informational purposes only.

6. Type the commission percentage for the technicians on a service call in **Commission %**.
   - **Commission %** allows users to split commissions on a service call. Each technician is given a commission based on the revenue generated from the service call.
   - **Commission %** is for informational purposes only.

7. Type the amount of revenue the technicians on a service call receive credit for in **Revenue Credited**.

8. Click **Save** on the toolbar, then **OK**.
Invoicing

Sending Invoices Electronically

Invoices created in Service Dispatch can be sent to customers and other contacts electronically using Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00). Invoices can be resent using Reprint Service Call Invoice (SD.650.00). To transmit invoices electronically, you must first set up Quick Send for the Service Call Invoice document type in Shared Information’s Quick Send Setup (21.951.00). You must also assign Quick Send preferences to the customer and any additional contacts on the Quick Send tab in Accounts Receivable’s Customer Maintenance (08.260.00).

Note: Shared Information’s Quick Send Inquiry (21.200.00) also provides you with the ability to resend documents. For more information about resending documents using Quick Send Inquiry (21.200.00), see “Resending Documents Delivered Electronically” in the Shared Information help or user guide.

To send invoices electronically:

1. Open Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00).

Figure 115: Service Call Invoice (SD.640.00)
2. Click **Print**. *Service Invoice Selection (SD.641.00)* displays.

![Image of Service Invoice Selection (SD.641.00) - Hi-Tech Headquarters](image)

*Figure 116: Service Invoice Selection (SD.641.00) – Service Call Invoice document type is defined in Quick Send Setup (21.951.00)*

3. Indicate the appropriate settings to select invoices.
4. Click **Continue**. *Service Invoice Printing – Keep/Delete (SD.642.00)* displays.
5. Verify **Handling** is set to Keep All Invoices.
6. Click **Begin Processing**. The invoice is printed, or it is transmitted electronically by means of Quick Send.

**Note:** If the invoice has not been transmitted electronically, Quick Send requests are created according to the Quick Send preferences defined for the Service Call Invoice document type on the **Quick Send** tab of Account Receivable *Customer Maintenance (08.260.00)*. Quick Send requests are also created for each additional receiver defined on Accounts Receivable *Additional Receivers (08.260.08)*. If the invoice was transmitted electronically, the Quick Send preferences indicated in the invoice’s **Quick Send** requests are used to resend the invoice to the initial recipients. For more information about Quick Send requests, see “Quick Send Inquiry (21.200.00)” in the Shared Information online help or user guide.
To resend invoices electronically:

2. Open Reprint Service Call Invoice (SD.650.00).

Figure 117: Reprint Service Call Invoice (SD.650.00)

2. Click Print. The invoice is printed, or it is transmitted electronically by means of Quick Send.

Note: If the invoice has not been transmitted electronically, Quick Send requests are created according to the Quick Send preferences defined for the Service Call Invoice document type on the Quick Send tab of Account Receivable Customer Maintenance (08.260.00). Quick Send requests are also created for each additional receiver defined on Accounts Receivable Additional Receivers (08.260.08). If the invoice was transmitted electronically, the Quick Send preferences indicated in the invoice’s Quick Send requests are used to resend the invoice to the initial recipients. For more information about Quick Send requests, see “Quick Send Inquiry (21.200.00)” in the Shared Information online help or user guide.

To send invoices to one-time receivers:

Note: Invoices cannot be sent to one-time receivers using Reprint Service Call Invoice (SD.650.00). For more information about sending invoices to a one-time receiver after the invoice has been kept, see “To send a Quick Send request to a one-time receiver” in the Shared Information online help or user guide.

1. Determine which service call associated with the invoice to send to the one-time recipient.
2. Open Service Call Invoice (SD.640.00).
3. Click **Print**. *Service Invoice Selection (SD.641.00)* displays.

![Service Invoice Selection (SD.641.00)](image1)

*Figure 118: Service Invoice Selection (SD.641.00) — Service Call Invoice document type is defined in Quick Send Setup (21.951.00)*

4. Clear the **All Service Calls** check box.
5. Enter the identification number of the service call determined in step 1 in **Service Call ID**.
6. Click **Quick Send to One-time Receiver**. *One-time Receiver (SD.641.03)* displays.

![One-time Receiver (SD.641.03)](image2)

*Figure 119: One-time Receiver (SD.641.03)*

7. Select the appropriate manner to send the invoice to the one-time recipient in **Delivery Method**.
8. Enter the one-time receiver’s email address in **Receiver Email Address** when **Delivery Method** is Email.
   - OR -

9. Enter the one-time receiver’s fax number in **Receiver Fax Number** when **Delivery Method** is Fax.

10. Select the appropriate settings for the one-time recipient based on the delivery method.

11. Click **Send Request** to send the invoice to the one-time recipient.
Viewing Details for Invoices Sent Electronically

When an invoice created in Service Dispatch is sent electronically to a customer, a Quick Send request is created instructing Application Server to transmit the invoice according to the Quick Send preferences defined on the Accounts Receivable Customer Maintenance (08.260.00), Quick Send tab. You can view Quick Send request details on Shared Information Quick Send Inquiry (21.200.00) by clicking the Quick Send Inquiry button in Service Call History (SD.301.00).

To view invoice Quick Send request details:
1. Decide which invoice’s Quick Send details you want to view.
2. Open Service Call History (SD.301.00). Service Call History (SD.301.00) displays.

3. Select the customer ID of the invoice determined in step 1 in Customer ID.
4. Select the site ID of the invoice determined in step 1 in Site ID.
5. Click the line in the Service Calls grid that contains the invoice determined in step 1.
6. Click Quick Send Inquiry. Quick Send Inquiry (21.200.00) opens and the invoice details appear.
Selecting Service Calls to be Invoiced

In Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00) you select service calls for invoicing that have an Approved Handling in Invoice Entry (SD.202.00).

There is a four-step process when invoicing a service call:

1. Service Call Invoice Approval (SD.204.00)
2. Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00)
3. Service Invoice Selection (SD.641.00)
4. Service Invoice Printing - Keep/Delete (SD.642.00)

Approving Service Call Invoices

To select a service call to approve:

1. Choose Module | Service Dispatch | Service Call Invoice Approval from the menu. Service Call Invoice Approval (SD.204.00) appears.
2. Select the check box next to any selection criteria you wish to have applied and then specify the filter value. For example:
   - Select the box next to Invoice Handling if you want to review service calls with only a specific invoice handling value.
   - Select Review from the drop-down list to view only service calls with an invoice handling value of Review.
3. Click Refresh after you have specified all selection criteria.
4. Review the data in the grid.
5. Click Close on the toolbar.
6. Choose Module | Service Dispatch | Service Call Invoice Approval from the menu. Service Call Invoice Approval (SD.204.00) appears.
7. Select the check box next to any selection criteria you wish to have applied and then specify the filter value. For example:
   - Select the box next to Invoice Handling if you want to review service calls with only a specific invoice handling value.
   - Select Review from the drop-down list to view only service calls with an invoice handling value of Review.
8. Click Refresh after you have specified all selection criteria.
9. Review the data in the grid.
10. Change the value in Invoice Date of the service call you want to modify.
11. Click in Invoice Handling of the service call you want to modify.
12. Select a new status for the invoice in **Invoice Handling**.

   **Note:** There are restrictions on setting **Invoice Handling** to Approved. When B is clicked, the following criteria must be true before the Update process can change the value in **Invoice Handling** to Approved.

   - The invoice must have at least one detail line.
   - The **Handling** value on **Service Call Entry** (SD.200.00) for the service call is not set to Quote.
   - The revenue account and subaccount combination is valid for each detail line in the invoice.
   - The Cost of Goods Sold account and subaccount combination is valid for each detail line in the invoice.
   - The Tax IDs for the invoice are valid and the tax total for the invoice is the sum of the detail tax by Tax ID.
   - **Invoice Date** is not blank.

13. Insure **Selected** is checked for all service calls you have modified.

14. Click **Update** to update the originating service calls with your changes.

15. Click **Close** on the toolbar.

**Selecting a Service Call to Invoice**

**To select a service call to invoice:**

1. Open **Service Call Invoice** (SD.640.00) by choosing **Module | Service Dispatch | Service Call Invoice** from the menu.

   **Service Call Invoice** (SD.640.00) displays.

   ![Figure 121: Service Call Invoice (SD.640.00), Report tab](image)

   **Note:** You can use Quick Send to transmit invoices if you select **Service Call Invoice (SSRS)** (SD.643.00) instead of **Service Call Invoice** (SD.640.00), and then follow the steps below.

2. To exclude invoices with total invoice amounts of zero, click the **Options** tab and select the **Suppress zero invoices printing** check box.
3. Click **Print** or **Print Preview**. **Service Invoice Selection** (SD.641.00) displays.

**Note:** For any open service call to be invoiced, **Handling** in **Invoice Entry** (SD.202.00) must be set to Approved.

![Service Invoice Selection (SD.641.00) - Hi-Tech Headquarters](image)

*Figure 122: Service Invoice Selection (SD.641.00) — Service Call Invoice document type is defined in Quick Send Setup (21.951.00)*

4. Type a **Period to Post**.
   - **Period to Post** determines which invoices are processed from **Invoice Entry** (SD.202.00).
   - Only invoices that have a **Period to Post** in **Invoice Entry** (SD.202.00) that matches the **Period to Post** in **Service Invoice Selection** (SD.641.00) are selected for invoicing.

**Note:** The current period from the Accounts Receivable module is the default **Period to Post** in **Service Invoice Selection** (SD.641.00). **Period to Post** in **Service Invoice Selection** (SD.641.00) can be overridden.

5. Choose an **Invoice Type**. The **Invoice Type** determines which invoices to print from **Invoice Entry** (SD.202.00).
   - Manual
   - Invoice
   - Progress
   - Manual/Invoice
   - Progress/Invoice
   - Progress/Manual
   - All

6. Choose a **Detail Type**. The **Detail Type** determines which invoices to print or send electronically from **Invoice Entry** (SD.202.00).
   - Time and Material
   - Flat Rate
   - All
7. To generate invoices for all branches in the organization, select the **All Branches** check box to the left of **Branch ID**.

8. To restrict generating invoices to a specific branch, clear the **All Branches** check box and type the appropriate branch in **Branch ID**.
   - If the branch ID is unknown, press F3 or double-click the right mouse button. A list of all branches set up in **Branch Maintenance** (SD.001.00) displays.
     - To select a branch ID, highlight the ID and click **OK**, or double-click the ID.
     - Clicking **Edit** on the **Branch Maintenance PV List** accesses **Branch Maintenance** (SD.001.00), enabling you to modify information for an existing branch.
     - Clicking **Insert** on the **Branch Maintenance PV List** accesses **Branch Maintenance** (SD.001.00), enabling you to add new branches to the system.

9. To generate invoices for all call types in the system, select the **All Call Types** check box to the left of **Call Type ID**.

10. To restrict generating invoices to a call type, clear the **All Call Types** check box and type the appropriate call type in **Call Type ID**.
    - If the call type ID is unknown, press F3 or double-click the right mouse button. A list of all call types set up in **Call Type Maintenance** (SD.003.00) displays.
      - To select a call type, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Call Type Maintenance PV List** accesses **Call Type Maintenance** (SD.003.00), enabling you to modify information for an existing call type.
      - Clicking **Insert** on the **Call Type Maintenance PV List** accesses **Call Type Maintenance** (SD.003.00), enabling you to add new call types to the system.

11. To generate invoices for all invoices with an **Approved Handling**, select the **All Service Calls** check box to the left of **Service Call ID**.

12. To restrict generating invoices to a service call, clear the **All Service Calls** check box and type the appropriate service call in **Service Call ID**.
    - If the service call ID is unknown, press F3 or double-click the right mouse button. A list of all service calls set up in **Service Call Entry** (SD.200.00) displays.
      - To select a service call ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Service Call Maintenance PV List** accesses **Service Call Entry** (SD.200.00), enabling you to modify information for an existing service call.
      - Clicking **Insert** on the **Service Call Maintenance PV List** accesses **Service Call Entry** (SD.200.00), enabling you to add a new service call to the system.

13. To generate invoices for all customers that have invoices with an **Approved Handling**, select the **All Customers** check box to the left of **Customer ID**.

14. To restrict generating invoices to a customer, clear the **All Customers** check box and type the appropriate customer in **Customer ID**.
    - If the customer ID must be changed or the ID is unknown, press F3 or double-click the right mouse button. A list of all active customers set up in **Customer Maintenance** (08.260.00) displays.
      - To select a customer ID, highlight the ID and click **OK**, or double-click the ID.
      - Clicking **Edit** on the **Customer List** accesses **Customer Maintenance** (08.260.00), enabling you to modify information for an existing customer.
      - Clicking **Insert** on the **Customer List** accesses **Customer Maintenance** (08.260.00), enabling you to add new customers to the system.

15. To generate invoices for all customer sites, select the **All Service Sites** check box to the left of **Site ID**.
16. To restrict generating invoices to a specific customer site, clear the All Service Sites check box and type the appropriate customer site in Site ID.
   - If the site ID is unknown, press F3 key or double-click the right mouse button. A list of all sites set up in Site Maintenance (SD.025.00) display.
     - To select a site ID, highlight the ID and click OK, or double-click the ID.
   - If a user chooses not to select All Service Sites, the system requires a specific site ID and therefore only generates invoices for that particular site.

17. To generate invoices for all technicians select the All Technicians check box to the left of Technician ID.

18. To restrict generating invoices to a specific technician, clear the All Technicians check box and type the appropriate technician in Technician ID.
   - If the technician ID is unknown, press F3 or double-click the right mouse button. A list of all technicians set up in Employee Maintenance (SD.007.00) displays.
     - To select a technician ID, highlight the ID and click OK, or double-click the ID.
     - Clicking Edit on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to modify information for an existing technician.
     - Clicking Insert on the Employee Maintenance PV List accesses Employee Maintenance (SD.007.00), enabling you to add new technicians to the system.

19. Click View Selections.
   - Service Calls Selected for Invoicing (SD.641.01) displays a list of all service calls selected for invoicing and allows users to select specific service calls to exclude from printing.

20. Click Continue to proceed with the invoicing process.
   - While invoices are printing or being sent electronically, Service Invoice Printing - Keep/Delete (SD.642.00) displays.

**Printing a Service Invoice**

![Service Invoice Printing - Keep/Delete (SD.642.00)](image)

1. Select a Handling option.
   - **Keep All Invoices**: All invoices have printed successfully.
     - **Note**: This is true except for manual invoices.
     - **Note**: Selecting this option creates a batch in Inventory for updating quantities on hand and cost of goods sold. It also creates a batch in Accounts Receivable for recognizing revenue and any applicable taxes.
   - **Delete All Invoices**: Prevents any invoices from posting.
     - **Note**: Selecting this option deletes the batch and allows the invoice to be printed.
2. Click **Begin Processing**.
   - Clicking **Begin Processing** creates the Inventory and Accounts Receivable batches unless **Handling** was set to **Delete All Invoices**.

**Note:** You can reprint an invoice. For more information, see “Reprint Service Call Invoice (SD.650.00)” on page 510.
Data Entry Screens

Data Entry Screens Overview

Service calls are the heart in the Service Dispatch module. The life cycle of a service call is a straightforward three-step process. Entering a service call in Service Call Entry (SD.200.00) is the first step of the service call process. Service Call Entry (SD.200.00) has been designed to allow customer service representatives to enter a service call into the system in the most simple and time saving manner. To begin the Service Call Entry process, a customer and site must first be selected. The fastest and most efficient way of processing a service call is to use the powerful search engine. The system allows users to search for customer site information based on site ID, site name, site attention, site description, site address, site phone, site city, site zip and various equipment information such as equipment ID and serial number.

Once the customer and site have been selected, values attached to the customer site default to the service call. Customer service representatives can override the default values and enter the other needed data such as scheduling information, call status, priority, start date, time promised, and primary technician. Several problem codes or reasons for the service call, along with notes or source documents specific to the issues can be attached to the service call. When all of the needed information is entered and the service call is saved, the system automatically assigns a Service Call ID if this feature is enabled in the Service Series Setup Maintenance (SD.000.00).

Based on options chosen in Service Series Setup Maintenance (SD.000.00), alert messages will be displayed to assist customer service representatives in the service call entry process. The PO Required message alerts users that a purchase order is mandatory and that a service call cannot be saved unless a purchase order number is entered. The Tenant Not Authorized to Call message notifies users that tenants are not allowed to place service calls. Only the property manager can place a call. The Open Service Calls message appears when a specific site has existing open service calls when placing the call and allows users to stack calls. The Active Service Contract message notifies users that a site has an existing service contract where the service call may be covered. An alert notifies you if a technician lacks the skills and licenses required to handle the particular service call.
Invoice - Technician Information (SD.028.00)

*Invoice - Technician Information* (SD.028.00) associates multiple technicians with a service call. This screen displays the vehicle ID, ending mileage on the assigned vehicle to track travel mileage, the commission percent to be paid to each individual technician, and the revenue generated by each technician assigned to a service call.

**Note:** Access *Invoice - Technician Information* (SD.028.00) through *Invoice Entry* (SD.202.00) by clicking *Technician Info*.

Figure 124: Invoice - Technician Information (SD.028.00)

Following are the field descriptions for *Invoice - Technician Information* (SD.028.00).

**Service Call ID**

*Service Call ID* displays the service call associated with this technician’s information. It is populated with the service call ID entered in *Invoice Entry* (SD.202.00).

**Customer ID**

*Customer ID* displays the customer identifier and name associated with a service call selected in *Invoice Entry* (SD.202.00).

**Assigned Technician**

*Assigned Technician* defaults to the primary service technician assigned to the service call. If no other service technician is entered, the primary technician receives the entire commission amount or percent.

**Technician ID**

*Technician ID* associates an unlimited number of technicians to a service call for the purposes of splitting commissions over two or more technicians.

**Tech Name**

*Tech Name* displays the name of a technician for this customer. Additional technicians assigned to this service call may be displayed.
Vehicle ID

Vehicle ID contains the number of the vehicle assigned to the selected technician.

Note: Technician ID, Tech Name, and Vehicle ID are all related fields. When you view information about a particular technician, all three fields are populated with information.

Ending Mileage

Ending Mileage contains the ending odometer mileage. Ending Mileage allows you to track and report the average revenue generated per mile, the efficiency of the dispatching department, etc.

Commission %

Commission % handles split commissions on a service call. By typing the commission percent for the technicians on a service call, each technician is given a commission based on the revenue generated from the call. You can split commissions between an unlimited number of technicians by entering each technician’s commission.

Revenue Credit

Revenue Credit credits any portion of the revenue generated from a service call to a technician. This amount is added to the technician’s accumulated sales totals.

Note: More than one technician can receive revenue credit for a service call.

Commission Total

Commission Total displays the total commission percentage associated with all technicians for this particular invoice. The amount displayed in Commission Total cannot exceed 100%.

OK (button)

OK saves the information typed into Invoice - Technician Information (SD.028.00).
Service Call Entry (SD.200.00)

Service Call Entry (SD.200.00) allows you to complete the first step of the service call process. After a service call is entered in the system, the call appears on the dispatch board. The dispatching department views all the calls and assigns the proper technician to the call, which is the second step of the service call process.

After the call has been dispatched and the technician has performed the necessary work, the call is completed or invoiced, which is step three of the process. This step allows you to create invoices in the Accounts Receivable module, multiple purchase orders in the Purchasing module, a payroll batch through the Payroll module, and various other accounting transactions. After completion and invoicing, all service calls are archived in the history tables.

Service Call Entry (SD.200.00) contains proactive messages that give you additional information about the service call. For example, the “PO required” message displays when a purchase order is mandatory and that the service call cannot be saved unless a purchase order number is entered. The “Tenant Not Authorized to Call” message indicates that tenants are not allowed to place a service call; therefore, the property manager must place the call. The “Open Service Calls” message appears when a specific site has open service calls and enables you to stack calls. The “Active Service Contract” message indicates that this site has a contract and describes how to attach the service contract to the call.

Credit related messages also assist in the service call entry process. Many credit checking features such as verifying a customer’s past-due open invoices, verifying that the customer’s credit limit has not been exceeded, etc., alert you regarding the customer’s credit status.
A quote can be produced in this screen. This indicates that the service call is a quote and has not been released to the dispatch queues.

![Service Call Entry (SD.200.00)](image)

Figure 125: Service Call Entry (SD.200.00)

Following are the field descriptions for Service Call Entry (SD.200.00).

**Service Call ID**

If the **Auto Number Service Call** check box is selected in Service Series Setup Maintenance (SD.000.00), the system assigns an identifier automatically when the service call is saved. In addition, if the **Auto-Number Branch Prefix** is enabled in Service Series Setup Maintenance (SD.000.00), the three-character abbreviation is added to the front of the service call ID.

**Notes/Attachments (Icon)**

**Notes/Attachments** allows the entry of or attaching a source document regarding the service call ID. Click the **Notes/Attachments** icon 📄 to choose to enter either a note or attach source documents. For more information, see “Attaching Notes and Source Documents to Data Items” in the Quick Reference user’s guide or help.
Call Lookup (icon button)
Click Call Lookup to open Service Call Lookup (SD.303.00), which gives you the ability to search for a particular service call. For more information, see “Service Call Lookup (SD.303.00)” on page 367.

Duplicate Call (icon button)
Click Duplicate Call to open Duplicate Service Call (SD.200.05), and create a new service call by copying an existing one. For more information, see “Creating a New Service Call Using Duplicate Call” on page 134.

Handling
Handling controls the system status of the service call. For example, if this is not a service call, set Handling to Quote. With this status, the call is not released to the dispatch board.

Note: Release Now is the only option that releases the record to the service call queue when the service call record is saved.

Company ID
Company ID contains the unique code assigned to the company. To select a company, place the cursor in Company ID, and then press F3 or double right-click. Company List appears. Select from the list of companies.
In a multi-company environment, Company ID contains the ID code of the currently active company. You can update Company ID only in a new, unsaved service call. After you save the service call, you can view Company ID, but not change it.

Completed Calls
Completed Calls controls the filter on the Service Call Maintenance PV List in Service Call ID to include only completed calls. If this check box is not selected, you view only those calls that are not complete.

Service Call - Problems Area
Following are the field descriptions for the Service Call - Problems area of Service Call Entry (SD.200.00).

Note: The tabs are described after this section.

Problem ID
Problem ID displays a code that describes the reason why the service call was issued.

Problem Name
Problem Name contains the explanation of the problem identifier entered for this call.

Technician ID
Technician ID contains the name of the technician assigned to this problem.

Contract ID
Contract ID contains the identifier of the service contract that applies to this problem.

Status
Status indicates where the problem stands in the service process; called Task Status in grid view.
Start Date
Start Date is the month, day, and year when work on this problem will begin.

Start Time
Start Time is the specific time or day when work on this problem will begin. Enter the time in a 24-hour (military) time format. For example, enter 1:00 PM as 13:00.

Travel Time
Travel Time is the amount of time it will take the technician assigned to the problem to go to the site and return. Travel Time may already be populated with a default value. The default is set in Graphical Dispatch Setup Maintenance (SD.902.00).

Duration
Duration contains the estimated amount of time required for the technician to travel to the problem, resolve it, and return. You can set a default value for Duration and attach it to a problem code in Problem Code Maintenance (SD.008.00). You can also override the value in this screen.

Equip ID
Equip ID contains the unique identifier of the equipment to be serviced on this service call.

PM Code
PM Code contains the preventive maintenance code for this equipment.

Warr Info Start Date
Warr Info Start Date contains the first day of the warranty.

Warr Info End Date
Warr Info End Date displays the last day of the warranty.

Serial Nbr
Serial Nbr displays the serial number of the equipment, if applicable.

Notes
Notes contains miscellaneous information about the call. Longer notes can be recorded using the Notes/Attachments icon.

Cause ID
Cause ID displays the root cause of the problem.

Resolution ID
Resolution ID contains the resolution of the problem.

Equipment (button)
Equipment accesses Customer Equipment (SD.200.03), which displays equipment associated with the site regardless of whether the customer is under a service contract. You can also view Equipment Entry (SE.001.00) by selecting a piece of equipment and clicking Details.

PM Tasks (button)
PM Tasks accesses Service Contract-Equipment PM Tasks (SE.017.00) and displays the line item detail of the PM code on this service call.
Open Calls (button)

Open Calls accesses Open Service Call (SD.200.02) and displays open calls for this customer or site related to the specified company. Open Calls is enabled only if a site has an open service call record for the specified company.

Service History (button)

Service History accesses Service Call History (SD.301.00) and displays a list of completed service calls associated with the selected site and details of the service call and invoice information.

Invoice (button)

Invoice accesses Invoice Entry (SD.202.00) for invoicing. Invoice is disabled if the company ID associated with the service call differs from the ID of the company you are currently accessing.

Print (button)

Print generates a service call work order which includes information related to the customer name and address, service call status, nature of work (problem code), and preventive maintenance information (if the call is a planned maintenance generated from a service contract).
Service Call Entry, Service Call Info Tab

Following are the field descriptions for the Service Call Info tab of Service Call Entry (SD.200.00).

Cust ID

If a customer/site is not selected using Search, type the Customer identifier or select one from the Customer List. When the identifier is entered, the customer name displays to the right of the field. Click the ellipsis (…) to the left of Cust ID to access Customer Maintenance (08.260.00) PV list in the Accounts Receivable module.

Customer Lookup (Icon button)

To search for a customer, click Customer Lookup, which opens Customer Lookup (SD.305.00). For more information, see “Customer Lookup (SD.305.00)” on page 371.

Filter Equip ID (check box)

If the Filter Equip ID check box next to Cust ID is selected, possible values for Equip ID in the Service Call - Problems grid will include only information for the specific customer. This check box can be selected along with the Filter Equip ID check box next to Site ID.
Site ID

Site ID selects the physical location of the work to be done for this service call. When the ID is entered, the site name displays to the right of Site ID. Click the ellipsis (…) to the left of Site ID to access Site Maintenance (SD.025.00).

Filter Equip ID (check box)

If the Filter Equip ID check box next to Site ID is selected, possible values for Equip ID in the Service Call - Problems grid will include only information for the specific site. This check box can be selected along with the Filter Equip ID check box next to Cust ID.

Attention, Address 1, Address 2, City, State, Zip, and Telephone Nbr

These fields display the customer's address and telephone information in the database.

Branch ID

Branch ID contains the branch identifier assigned to the site for the service call. After a site has been selected, the site branch identifier and service call defaults appear. You can override this data, if desired.

Geographic ID

Geographic ID contains the geographic identifier assigned to the service call. After a site has been selected, the site geographic identifier and service call defaults appear. You can override this data, if desired.

Project ID

Project ID associates or links a service call and associated costs of performing the work to a project. To select a project, press F3 to access the Active Projects in Login Company List.

Contract ID

Contract ID associates a service contract created in Service Contract Entry (SN.001.00) in the Service Contracts module with a service call. The contract ID on a service call populates the screen with the associated values and utilizes any special pricing associated with the contract ID during invoice entry. Click the ellipsis (…) to the left of Contract ID to view active service contracts in the Active Customer Contracts PV List. If you select a site record and the site has an active service contract, a soft warning is displayed.

Call Type

Call Type defines the line of business, division, or profit center associated with a service call. A default value populates from Site Maintenance (SD.025.00), which can be overridden. Call Type also determines the subaccount used during the invoice entry process. It defaults to the subaccount on the call type unless you selected the Use Sub from Site check box in Call Type Maintenance (SD.003.00).

Call Status

Call Status defines the status of a service call. A default value populates from Site Maintenance (SD.025.00), which can be overridden. Click the ellipsis (…) to the left of Call Status to view the Service Call Status Log (SD.027.00).

Promised Date

Promised Date contains the date the service call was requested. The promised date defaults to the system date unless the call is outside normal working hours. This date may be overridden. If the Primary Use Option in Service Series Setup Maintenance (SD.000.00) is set to Work Orders, then the date does not default.
**Time From** and **Time To**

**Time From** and **Time To** contain the time range in which a service call is to be performed. **Time From** is calculated using the system clock plus the service call lead-time in **Service Series Setup Maintenance** (SD.000.00). **Time To** is **Time From** plus the service call range time from **Service Series Setup Maintenance** (SD.000.00). The default values may be overridden.

**Primary Tech**

**Primary Tech** identifies the primary technician on a service call although multiple technicians may be assigned.

**Priority**

**Priority** assigns a priority to a service call. A default value populates from **Site Maintenance** (SD.025.00). If a service contract ID exists for the service call, the priority defaults from the contract type associated with the selected contract ID.
Service Call Entry, New Customer Tab

The New Customer tab allows you to add new customer and site information rapidly without opening the Accounts Receivable module. Service Series Setup Maintenance (SD.000.00) includes the option to auto-number customer identifiers. If enabled, the system assigns the value in Customer ID. If Auto Number Customer ID is disabled, the system requires a customer ID prior to clicking Create. The system checks for duplicate customer IDs whenever a new customer is created. Refer to Site Maintenance (SD.025.00) in this manual and Customer Maintenance (08.260.00) in the Accounts Receivable module for more information.

![Service Call Entry (SD.200.00)](image)

Figure 127: Service Call Entry (SD.200.00), New Customer tab

Following are the field descriptions for the New Customer tab of Service Call Entry (SD.200.00).

**Cust ID**

If a customer/site is not selected using Search, type the Customer identifier or select one from the Customer List. When the ID is entered, the customer name displays to the right of the field. Click the ellipsis (…) to the left of Cust ID to access Customer Maintenance (08.260.00) PV list in the Accounts Receivable module.
Site ID
Site ID selects the physical location of the work to be done for this service call. When the ID is entered, the site name displays to the right of Site ID. Click the ellipsis (…) to the left of Site ID to access Site Maintenance (SD.025.00).

Description
Description contains an explanation of the site.

Name
Name contains the contact person at this site.

Salutation
Salutation contains the first line of a letter used when corresponding with this customer.

Attention, Address 1, Address 2, City, Zip/Country/Region, Phone/Ext, and Fax/Ext
These display-only fields contain the customer’s address and telephone information from the Accounts Receivable module.

Class ID
Class ID is a unique identifying code that distinguishes this product class from all other product classes in the database. New product classes must be defined in the Inventory module.

Salesperson
Salesperson displays the salesperson associated with the completed service call. The salesperson defaults from Site Maintenance (SD.025.00).

Terms ID
Terms ID displays the term for the service call. Terms ID defaults from the customer identifier associated with the selected site.

Tax ID
Tax ID displays the tax identifier associated with the service call. Tax ID defaults from Site ID.

Card Nbr
Card Nbr displays the credit card number used to pay for the service call.

Card Holder Name
Card Holder Name displays the name of the person on the credit card.

Type
Type indicates the type of card used; for example, Visa, Master Card, etc.

Expiration Date
Expiration Date contains the expiration date of the credit card.

Phone/Ext
Phone/Ext contains the phone number and extension for the customer.

Fax/Ext
Fax/Ext displays the fax number and extension for the customer.
Print Statements (check box)
Select this check box to print a statement for the customer each time you print statements for the customer's statement cycle. Clear the check box if the customer's statement should not be printed.

Statement Cycle
Statement Cycle displays the identification code of the customer's statement cycle. The statement cycle defaults to the code set up in the Customer Defaults tab of AR Setup (08.950.00).

Branch ID
Branch ID displays the branch identifier associated with the service call.

Call Type
Call Type ID contains the service call type identifier associated with a service call. Call Type ID defaults from Service Call Entry (SD.200.00).

Call Status
Call Status associates the service call status identifier with a service call. Call Status defaults the status identifier from Dispatch (SD.201.00).

Dwelling
Dwelling contains the unique dwelling identifier for each dwelling type in the system. The dwelling ID is a default value from Site Maintenance (SD.025.00) which is associated with a service call record.

Geo Zone ID
Geo Zone ID contains the area of the country or region where the service call is located.

Priority
Priority contains the level of importance assigned to a service call. A default value populates from Site Maintenance (SD.025.00). If a service contract ID exists for the service call, the priority defaults from the contract type associated with the selected contract ID.

Technician
Technician contains the technician assigned to the service call.

Proj Manager
Proj Manager contains the name of the Project Manager or Service Manager assigned to the site.

Create (button)
Create saves the record.
Service Call Entry, Other Info Tab

The Other Info tab allows you to enter or view miscellaneous information related to the service call, including aging information on the customer.

Following are the field descriptions of the Other Info tab for Service Call Entry (SD.200.00).

**Caller Name**

Caller Name contains the contact name for the person calling in the service request. If a name was entered in Attention in Site Maintenance (SD.025.00), the value is shown in Caller Name.

**Customer PO**

Customer PO displays the customer’s purchase order number for a service request. Some customers require a purchase order number be typed in and printed on the billing invoice. If a blanket purchase order number was typed in Site Maintenance (SD.025.00), it appears in Customer PO.

**Sec Entry Code**

Sec Entry Code contains the security access code that may be needed by the service technician(s) to obtain access into a security building. Sec Entry Code defaults from Site Maintenance (SD.025.00).
Media ID
Media ID contains the media identifier for a service call. Media ID defaults from the site and may be overridden.

Terms ID
Terms ID contains the term identifier for the service call. Terms ID defaults from the customer ID associated with the selected site.

Pymnt Method
Pymnt Method selects a payment method for a service call. The default payment method populates based on the selected value in Site Maintenance (SD.025.00).

Invoice Status
Invoice Status indicates whether the invoice is open or closed. Invoice Status is managed by the system.

Invoice Handling
Invoice Handling indicates the invoice handling, which assists you during the approval process prior to invoicing the service call. Usually, Invoice Handling is only changed during Invoice Entry (SD.202.00).

Source Svc Call ID
Source Svc Call ID shows the identification code assigned to the service call used to create the current service call.

Bill to Customer
Bill To Customer contains the customer ID that will be invoiced for any billable items on the service call. This field defaults to the customer ID on the Service Call Info tab, but can be overridden so that the service call history can be maintained on a different customer than the one billed for the work.

Credit Card Nbr
Credit Card Nbr contains the credit card number used to pay for service calls.

Card Type
Card Type indicates the type of card used; such as, Visa, Master Card, etc.

Expiration Date
Expiration Date contains the expiration date of the credit card.

Current Balance
Current Balance contains the outstanding balance due as of the system date.

1 To 30
1 To 30 displays the outstanding balance from 1 to 30 days past due.

31 To 60
31 To 60 displays the outstanding balance from 31 to 60 days past due.

61 To 90
61 To 90 displays the outstanding balance from 61 to 90 days past due.
Over 90
Over 90 displays the outstanding balance over 90 days past due.

Available Credit
Available Credit displays the remaining credit available to this customer.
Service Call Entry, Tech Available Tab

The Tech Available tab allows you to view technician workload on the promise date of the service call.

Options Tab

The Options tab allows you to enter parameters to filter the information displayed on the View tab.

![Tech Available Options Tab](image)

Following are the field descriptions of the Options tab on the Tech Available tab for Service Call Entry (SD.200.00).

Emp Class All (check box)

The Emp Class All check box allows you to indicate whether the information on the View tab displays information for all employees regardless of the employee class they are assigned to. Select the box to indicate all employee classes should be displayed.

Emp Class

Emp Class allows you to filter the information on the View tab so that only employees assigned to the employee class entered are displayed. The Emp Class All check box must be cleared in order to filter on just one employee class.
Branch ID All (check box)
The Branch ID All check box allows you to indicate whether the information on the View tab displays information for all employees and service calls regardless of the branch ID they are assigned to. Select the box to indicate all branch IDs should be displayed.

Branch ID
Branch ID allows you to filter the information on the View tab so that only employees and service calls assigned to the branch ID entered are displayed. The Branch ID All check box must be cleared to filter on just one branch ID.

Geographic All (check box)
The Geographic All check box allows you to indicate whether the information on the View tab displays information for all employees and service calls regardless of the geographic zone they are assigned to. Select the box to indicate all geographic zones should be displayed.

Geographic
Geographic allows you to filter the information on the View tab so that only employees and service calls assigned to the geographic zone entered are displayed. The Geographic All check box must be cleared to filter on just one geographic zone.
View Tab

The View tab allows you to view technician workload on the promise date of the service call.

![Service Call Entry (SD.200.00), Tech Available View tab](image)

Following are the field descriptions of the View tab on the Tech Available tab for Service Call Entry (SD.200.00).

**Technician**

Technician contains the employee ID from Employee Maintenance (SD.007.00) for all technicians assigned to the geographic zones included in Queue ID entered on the Options tab. Technicians are assigned to geographic zones using either Geographic Zone - Employees (SD.038.00) or Employees - Geographic Zones (SD.039.00).

**Calls**

Calls contains the total number of problem codes to which the technician has been assigned for the day being viewed. A technician may be assigned to multiple problem codes on a single service call.

**Duration**

Duration contains the total amount of time for all problem codes assigned to the technician on the day being viewed, including travel time.
Data Entry Screens

Zone
Zone contains the geographic zone where a technician is currently located. Zone is populated if the technician has a call with a status of In-Route or WIP. A technician can only have one call In-Route or WIP at a time. The geographic zone for a customer site is defined on Site Maintenance (SD.025.00).

Assigned Zone(s)
Assigned Zone(s) contains the geographic zones to which the technician is assigned. Geographic zone assignments are made using either Employees - Geographic Zones (SD.039.00) or Geographic Zone - Employees (SD.038.00).

Gantt Chart
The Gantt chart contains the start time, finish time, and duration of each problem code for which a technician has been assigned in a graphical format. Problem codes are not displayed in the Gantt chart if they are not associated with a technician or do not have a start time and a duration greater than zero. Each problem code for a particular service call is assigned a line ID. The line ID corresponds to the line number of the problem code in the problem code grid on Service Call Entry (SD.200.00).

The day you are currently viewing is displayed on the Gantt chart date bar. You can navigate to different days by pressing the arrows on either side of the date bar or by right-clicking on the date bar.

The Gantt chart also displays task bars representing technician status when the technician is not available for assignments. Use Status in Employee Maintenance (SD.007.00) or Employee Schedule (SD.904.00) to indicate when a technician is not available for assignments.

The Gantt chart task bars have the following features:

Color-coded task bars allow quick determination of the status of a problem code. A problem code appears on the Gantt chart only if the status of the problem is something other than Unassigned. The color scheme for the task bars is determined in Graphical Dispatch Setup Maintenance (SD.902.00).

Color-coded task bars also allow the quick determination of the status of a technician. Technician status can be set via Employee Maintenance (SD.007.00) for all dates or via Employee Schedule (SD.904.00) for a limited date range. The color scheme for the task bars is determined in Graphical Dispatch Setup Maintenance (SD.902.00). Technician status values that can be displayed as a bar in the Gantt chart include:

- Vacation
- Sick
- Personal
- Training

Task bar text quickly provides basic information. If the task bar represents a technician’s status, the text displayed on the task bar is the technician’s service employee ID and status. If the task bar represents a problem code, the text displayed on the task bar is determined by the selection made from the following options in Graphical Dispatch Setup Maintenance (SD.902.00):

- **ServiceCallID**: Line ID
- **FaultCodeID**: Line ID (Note: The FaultCodeID is the same as the Problem Code ID)
- **CallerName**: Phone
- **CallerName**: Addr1 (Note: Addr1 is Address Line 1 from the customer site)
- **Status**: FaultCodeID; Line ID
- **Addr1**
Allowing the mouse pointer to hover over a problem code task bar causes a tool tip to appear displaying the following information:

- **Problem Code** status
- **Zone ID**
- **Caller Name**
- **Customer Name**
- **Address Line 1**
- **City**
- **Zip Code**
- **Phone Number**

Allowing the mouse pointer to hover over a task bar representing a technician’s status causes a tool tip to appear displaying the technician’s service employee ID and the technician’s status.

*Duplicate Service Call* (SD.200.05) appears when you click the **Duplicate Call** icon button in **Service Call Entry** (SD.200.00). Use this screen to create a new service call by copying an existing one.

![Duplicate Service Call (SD.200.05)](image)

*Figure 131: Duplicate Service Call (SD.200.05)*

Following are the field descriptions for **Duplicate Service Call** (SD.200.05).

**Service Call ID**

*Service Call ID* displays the identification code assigned to the service all you want to copy. Press **F3** to see a list of service calls for the company you entered in **Service Call Entry** (SD.200.00).

**Call Lookup (icon button)**

Click **Call Lookup** to open **Service Call Lookup** (SD.303.00), which gives you the ability to search for a particular service call.

**OK (button)**

After you select the service call you want to duplicate, click **OK** to copy it. The details of the existing service call appear in **Service Call Entry** (SD.200.00).

**Cancel (button)**

Click **Cancel** to close the screen without copying a service call.
**Dispatch (SD.201.00)**

*Dispatch (SD.201.00)* allows the dispatching department to manage open calls and calls that are in progress. Service calls can be viewed in many ways. For example, you can set up *Dispatch (SD.201.00)* to view only plumbing type calls or to view only high or premium priority calls.

The majority of *Dispatch (SD.201.00)* fields are display-only. Following are the descriptions for data entry fields and buttons on *Dispatch (SD.201.00)*.

![Dispatch (SD.201.00) screen](image)

*Figure 132: Dispatch (SD.201.00)*

The majority of *Dispatch (SD.201.00)* fields are display-only. Following are the descriptions for data entry fields and buttons on *Dispatch (SD.201.00)*.

**Queue ID**

*Queue ID* contains the call queue identifier used to select how service calls are displayed. A default queue ID for the user is populated based on the selected service call configuration in the *User Configuration* sub-screen of *Service Series Setup Maintenance (SD.000.00)*. Type in a new queue identifier, or select one from the *Call Queue View PV List* to override the default value.

**Description**

*Description* contains an explanation of the selected queue identifier.

**From**

*From* selects the starting date to view the service calls on *Dispatch (SD.201.00)*. The default is seven days prior to the system date. Service calls with a promised date between the user-specified date ranges are displayed.

**To**

*To* selects the ending date to view the service calls. The default is the system date. Service calls with a promised date between the user-specified date ranges are displayed.
Query Now (button)
Query Now refreshes and updates the records with changes to the service calls in the system.

Options (button)
Options accesses Dispatch - View Maintenance (SD.004.00), which allows you to enter or modify the sort and select options for displaying records on Dispatch (SD.201.00).

Service Call (button)
Service Call accesses Service Call Entry (SD.200.00) and populates the screen with the record selected on Dispatch (SD.201.00).

Status Log (button)
Status Log accesses Service Call Status Log (SD.027.00) to view the status changes during the life cycle of the service call. Every time the call status is changed, the system updates Service Call Status Log (SD.027.00). The status log appears only when a record is saved.

Problems (button)
Problems accesses Service Call - Problem Code Entry (SD.407.00), that is used to view/modify/enter problem codes and other specific information related to the nature of the problem. If any changes are made to Est Hours, Expected Time on Dispatch (SD.201.00) is updated accordingly.

Page (button)
Page accesses Dispatch - Service Call Page (SD.024.00), which sends an alphanumeric page to the technician in the field and updates Dispatch (SD.201.00) with the assigned technician, start date, and start time.

History (button)
History accesses Service Call History (SD.301.00), which lists the completed service calls associated with the selected record as well as service call and invoice information.

Invoice (button)
Invoice accesses Invoice Entry (SD.202.00). Invoice is not available if the company ID associated with the service call differs from the company you are currently accessing.
### Invoice Entry (SD.202.00)

*Invoice Entry* (SD.202.00) contains the details of a service call or a job. *Invoice Entry* (SD.202.00) and the subscreens accessed from **Details** at the bottom of the screen allow you to enter data that interfaces with many other modules. Once a service call ID has been selected, **Customer ID**, **Site ID**, and other related fields linked to the service call default onto the screen.

![Invoice Entry (SD.202.00), Invoice Info tab](image)

Following are the field descriptions for *Invoice Entry* (SD.202.00).

#### Completed Calls

*Completed Calls* controls the filter on the **Service Call Maintenance PV List** in **Service Call ID** to include only completed calls. If this check box is not selected, you view only those calls that are **not** complete.

#### Service Call ID

**Service Call ID** selects a service call to complete an invoice with the appropriate detail information.

#### Branch ID

**Branch ID** contains the branch identifier associated with the service call.

#### Customer ID

**Customer ID** validates the customer identifier with the service call. The customer name displays to the right of **Customer ID**.

#### Site ID

**Site ID** validates the site identifier with the service call. The site name displays to the right of **Site ID**.

#### Status

**Status** indicates whether the service call is open or closed. **Status** is managed by the system and does not require user intervention.
Handling

Handling indicates the invoice handling used during the approval process prior to invoicing the service call. In order to create an invoice, recognize revenue, and apply costs, Handling must be set to Approved.
Invoice Entry, Invoice Info Tab

Following are the field descriptions for the Invoice Info tab of Invoice Entry (SD.202.00).

Service Type

Service Type selects the type of detail desired for a service call in the Invoice Entry process. The two options available are Flat Rate and Time & Material.

Invoice Type

Invoice Type allows the selection of one of the following options when creating an invoice number:

- Invoice: Invoice/Memo Nbr is disabled. The system assigns the invoice number. Assigned to a service call after the service call invoices are printed and saved to the system through Service Invoice Printing - Keep/Delete (SD.642.00).
- Manual: Requires that a user-specified invoice number be typed into Invoice/Memo Nbr before the invoice information can be saved to the system in Invoice Entry (SD.202.00).
- Progress: Allows users to invoice customers for material and labor used to perform the work without closing the service call. Therefore, additional work and detail lines items can be added to the service call for invoicing.

Completed Date

Completed Date contains the date the service call was completed.

Invoice Date

Invoice Date contains the accounts receivable aging date for the invoice.

Invoice/Memo Nbr

Invoice/Memo Nbr contains the invoice number if the Invoice Type is set to Manual.
Workorder Nbr

Workorder Nbr contains a work order number associated with the service call. The work order number may be included on the customer's invoice. This value displays in Reference in Accounts Receivable.

Salesperson ID

Salesperson ID contains the salesperson associated with the completed service call. The salesperson defaults from Site Maintenance (SD.025.00).

Primary Tech

Primary Tech defaults from Dispatch (SD.201.00) and displays the primary technician assigned to the service call.

Period to Post

Period to Post overrides the default post period. The current period from the Accounts Receivable module is the default period and may be overridden by typing in the desired period.

Terms

Terms displays a term identifier for a service call. The terms default from the Customer Maintenance table.

Company ID

Company ID defaults from Branch ID entered in Service Call Entry (SD.200.00).

Alt Cust ID

Alt Cust ID contains the valid customer identifier used as the billing customer account (for example, manufacturer warranty). However, the service call history continues to be the actual customer and site as designated during service call entry.

Orig Call Nbr

Orig Call Nbr displays a valid service call identifier used to associate the current service call to another service call. For example, the current service call may be a “call back” to previously performed service work.

Contract ID

Contract ID identifies whether the service call is associated with a service contract. If it is a contract call, but not a preventive maintenance service call, then special pricing related to the service contract is in effect. If a service contract is associated with the service call and the service call is a preventive maintenance call, then special pricing at the preventive maintenance level is in effect. (See contract pricing.)

Project ID

Project ID displays costs associated with the service call and updates the profitability of the project through Issues (10.020.00) in the Inventory module.

Description

Description contains a short description. This is a free-form 30-character field.

Last Inv. Date

Last Inv. Date displays the date the service call was last invoiced.
Billed Hrs
Billed Hrs displays the total billed hours entered in Invoice - T & M Details (SD.203.00) or Invoice - Flat Rate Order (SP.200.00), depending on the invoice type.

Worked Hours
Worked Hours displays the total worked hours from Invoice - T & M Details (SD.203.00) or Invoice - Flat Rate Order (SP.200.00), depending on the invoice type.

Labor
Labor displays the total labor dollar amount entered in Invoice - T & M Details (SD.203.00).

Materials/Other
Materials/Other displays the total material and other related dollar amounts entered in Invoice - T & M Details (SD.203.00).

Subtotal
Subtotal displays the subtotal of the invoice.

Disc %
Disc % displays the total discount percentage of this invoice.

Discount
Discount displays the total discount amount of this invoice.

Tax
Tax displays the total tax amount entered in the detail lines.

Total
Total displays the total invoice amount from all detail lines, including the calculated sales tax totals.

Technician Info (button)
Technician Info accesses Invoice - Technician Information (SD.028.00), which accepts technician data needed to calculate special commission handling for the selected service call. Split commission information may be used, enabling the system to report commission for two or more technicians.

Details (button)
Details accesses one of two screens depending on the invoice type selected: Time & Materials or Flat Rate. For flat rate type invoices, only billable lines are entered with no association to service contracts or projects. For Time & Materials type invoices, you can enter billable, non-billable, contract, project, and warranty detail line types for labor and materials.

Invoice Notes (button)
Invoice Notes allows notes to be included on a printed invoice.

Note: These notes are billable notes, not service call notes.

Billing Address (button)
Billing Address accesses Customer Information (SD.202.01), which allows the billing address associated with the service call invoice to be viewed.
**OK (button)**

**OK** closes the screen and saves any changes.
Invoice Entry, Other Info Tab

The Other Info tab contains additional information, such as the caller’s name (defaulted from Service Call Entry (SD.200.00), the customer’s purchase order (if applicable), the media ID associated with this specific service call, and a description of the media ID. Program/Coupon ID accepts a coupon identifier that assists in the tracking of advertising resources. The Satisfied check box indicates that the customer is pleased with the service provided from the service company.

![Invoice Entry (SD.202.00), Other Info tab](image)

Following are the field descriptions of the Other Info tab for Invoice Entry (SD.202.00).

**Completed Calls (check box)**

Completed Calls controls the filter on the Service Call Maintenance PV List in Service Call ID to include only completed calls. If this check box is not selected, you view only those calls that are not complete.

**Service Call ID**

Service Call ID selects a service call to complete an invoice with the appropriate detail information.

**Branch ID**

Branch ID contains the branch identifier associated with the service call.

**Customer ID**

Customer ID validates the customer identifier with the service call. The customer name displays to the right of Customer ID.

**Site ID**

Site ID validates the site identifier with the service call. The site name displays to the right of Site ID.

**Status**

Status indicates whether the service call is open or closed. Status is managed by the system and does not require user intervention.
Handling

Handling indicates the invoice handling used during the approval process prior to invoicing the service call. In order to create an invoice, recognize revenue, and apply costs, Handling must be set to Approved.

Call Status

Call Status associates the service call status identifier with a service call. Call Status defaults the status identifier from Dispatch (SD.201.00).

Call Type

Call Type displays the service call type identifier associated with a service call. Call Type defaults from Service Call Entry (SD.200.00).

Media ID

Media ID associates a media identifier with a service call.

Program/Coupon ID

Program/Coupon ID allows a coupon reference number to be typed in if the service call is associated with a coupon.

Satisfied

Satisfied indicates whether a customer is satisfied with the service provided. This allows Management to generate reports on customer satisfaction.

Caller Name

Caller Name displays the contact name for the person calling in the service request. If a name was entered in Attention in Site Maintenance (SD.025.00), the value is shown in Caller Name.

Customer PO

Customer PO displays the customer’s purchase order number or reference number. If a customer purchase order is typed into Service Call Entry (SD.200.00), it defaults to Customer PO.

Payment Method

Payment Method selects the method used for payment of this invoice.

Check/Card Nbr

Check/Card Nbr contains the appropriate check or card number, if Check or Credit Card was selected in Payment Method.

Exp Date

Exp Date contains the expiration date of the credit card.

Processed By

Processed By contains the name of the user who processed the invoice.

Processed Date

Processed Date contains the date the invoice was processed.

Reviewed By

Reviewed By displays the name of the user who reviewed the invoice.
Reviewed Date
Reviewed Date displays the date the invoice was reviewed.

Technician Info (button)
Technician Info accesses Invoice - Technician Information (SD.028.00), which accepts technician data needed to calculate special commission handling for the selected service call. Split commission information may be used, enabling the system to report commission for two or more technicians.

Details (button)
Details accesses one of two screens depending on the invoice type selected: Time & Materials or Flat Rate. For flat rate type invoices, only billable lines are entered with no association to service contracts or projects. For Time & Materials type invoices, you can enter billable, non-billable, contract, project, and warranty detail line types for labor and materials.

Invoice Notes (button)
Invoice Notes allows notes to be included on a printed invoice.

Note: These notes are billable notes, not service call notes.

Billing Address (button)
Billing Address accesses Customer Information (SD.202.01), which allows the billing address associated with the service call invoice to be viewed.

OK (button)
OK closes the screen and saves any changes.
Invoice Entry, Invoice History Tab

The Invoice History tab displays all invoice transactions processed against the service call. For example, a service call with an invoice type handling of Progress may generate two or more invoices for the same service call. The information on this screen displays each invoice transaction created in Accounts Receivable.

Figure 136: Invoice Entry (SD.202.00), Invoice History tab

Following are the field descriptions of the Invoice History tab for Invoice Entry (SD.202.00).

Completed Calls (check box)

Completed Calls controls the filter on the Service Call Maintenance PV List in Service Call ID to include only completed calls. If this check box is not selected, you view only those calls that are not complete.

Service Call ID

Service Call ID displays the service call identifier associated with this invoice.

Branch ID

Branch ID displays the branch identifier associated with the service call.

Customer ID

Customer ID displays the customer identifier and customer name associated with the service call.

Site ID

Site ID displays the site identifier and site name associated with the service call.

Status

Status indicates whether the service call is open or closed. Status is managed by the system and does not require user intervention.
Data Entry Screens

Handling
Handling indicates the invoice handling used during the approval process prior to invoicing the service call.

Company ID
Company ID defaults from the branch identifier entered in Service Call Entry (SD.200.00).

Customer ID
Customer ID displays the customer identifier and customer name associated with the service call.

Service Call ID
Service Call ID displays the service call identifier associated with the selected service call.

Invoice Date
Invoice Date displays the accounts receivable aging date for the invoice.

Tran Date
Tran Date displays the payroll period date.

Invoice Nbr
Invoice Nbr displays the number of the invoice for this service call.

Invoice Amt
Invoice Amt displays the amount due on this invoice.

Tax Amt
Tax Amt contains the total sales tax amount for the order.

AR Batch Nbr
AR Batch Nbr displays the number assigned by the system for Accounts Receivable processing.

Technician Info (button)
Technician Info accesses Invoice - Technician Information (SD.028.00), which accepts technician data needed to calculate special commission handling for the selected service call. Split commission information may be used, enabling the system to report commission for two or more technicians.

Details (button)
Details accesses one of two screens depending on the invoice type selected: Time & Materials or Flat Rate. For flat rate type invoices, only billable lines are entered with no association to service contracts or projects. For Time & Materials type invoices, you can enter billable, non-billable, contract, project, and warranty detail line types for labor and materials.

Invoice Notes (button)
Invoice Notes allows notes to be included on a printed invoice.

Note: These notes are billable notes, not service call notes.

Billing Address (button)
Billing Address accesses Customer Information (SD.202.01), which allows the billing address associated with the service call invoice to be viewed.
OK (button)

OK closes the screen and saves any changes.
Invoice - T & M Details (SD.203.00)

Invoice - T & M Details (SD.203.00) accepts line item details for a service call. When the invoice is saved, the quantities for inventory line items are reserved in the Inventory module. When all details are complete and the invoice process has been run, the information from Invoice - T & M Details (SD.203.00) is sent to the appropriate modules based on the line types selected for each line of detail. A line type is the indicator for a line item, which tells the system whether to charge the line item to a customer, to a service contract, to a job/project, or to no one in the case of warranty or other non-billable charges. The Line Types options include: Billable, In-House Warranty, Manufacturer Warranty, Non-Billable, Project, and Service Contracts.

Note: You can use Timesheet Report (SD.400.00) to generate the Time Sheet and Invoice Report (SD.624.00). For more information, see “Timesheet Report (SD.400.00)” on page 534.

Figure 137: Invoice - T & M Details (SD.203.00)

Following are the field descriptions for Invoice - T & M Details (SD.203.00).

Service Call ID
Service Call ID displays the service call identifier associated with the selected service call.

Customer ID
Customer ID displays the customer identifier and customer name associated with the selected service call.

Site ID
Site ID displays the site identifier and site name associated with the selected service call.
Project ID

Project ID displays the project identifier associated with the selected service call.

Contract ID

Contract ID displays the contract identifier associated with the selected service call.

Subtotal

Subtotal displays the subtotal for the order. This figure does not include sales tax or non-billable amounts.

Tax

Tax displays the total sales tax amount for the order.

Total

Total displays the total dollar figure for the detail. This total is calculated by adding the subtotal and the tax total.

Line Types

Line Types selects the appropriate behavior related to the specific line item record. A selection may be made from the following line types:

- Billable: This option creates a transaction in the Accounts Receivable module.
- In-house Warranty: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The In-house Warranty option also enables you to create operation reports for analysis.
- Manufacturer’s Warranty: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The Manufacturer’s Warranty option also enables you to create operation reports for analysis.
- Non-billable: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. If a negative quantity is used, then the detail record in Issues (10.020.00) of Inventory is defined as a credit memo.
- Project: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a project ID present on the service call as well as a task ID associated with the detail line item. Project line items sent from inventory updates the profitability of the respective project.
- Service Contract: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a contract ID to be present on the service call as well as a contract ID to be associated with the detail line item. Service contract line types update the Contract History Profitability table.

Line Item ID

Line Item ID indicates inventory items from the Inventory module. These inventory items are the parts and/or labor that are needed to complete a service call. An inventory item may be selected either by typing in the desired inventory item or by accessing the Inventory Item List and selecting the desired inventory item. The inventory description displays to the right of Line Item ID.

Note: Inventory items that are lot or serial tracked and have the assignment of When Used cannot be used in Service Dispatch. Inventory items that use Specific Identification valuation also cannot be used in Service Dispatch. These items will also not be seen in the possible values list for the Line Item ID field.
**Detail Type**

Detail Type contains the classification of the current record being entered as either labor or materials. Detail Type populates based on Type in Inventory Items (10.250.00). Detail Type displays Material for any selection other than Labor.

**Class**

Class contains the product class associated with a specific inventory item. Class defaults the product class associated with the selected inventory item. In addition, Class may control the commission and mark-up categories.

**Invt Location ID**

Invt Location ID associates the inventory item entered with a specific inventory storage or inventory site (warehouse, truck, etc.). The quantity used is reserved in Inventory when the transaction is saved. When the details are sent to the Inventory module and are processed, the transaction decrements the quantity available for inventory location ID entered in the detail record.

**Whse Loc**

Whse Loc associates a warehouse location with the inventory item.

**Worked Hours (Labor Only)**

Worked Hours contains the number of work hours to be paid to the technician/employee and charged to the service call.

**Billed Hrs (Labor Only)**

Billed Hrs contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal. Billed Hrs is enabled for billable line types only.

**Qty Used (Material Only)**

Qty Used contains the quantity of a specific inventory item used to complete a call. This number is multiplied by the unit price to calculate the extended price for an item.

**Serial Nbr**

Serial Nbr contains the serial number for the inventory item.

**Base Price**

Base Price displays the stock base price default value from the inventory ID. Base Price assists in identifying if any “special pricing” is in effect for the line item record.

**Unit Price**

Unit Price contains the unit price for a line item. The unit price may differ from the stock base price if any special pricing is applicable (for example, site or contract pricing, mark-up ID, etc.). Unit Price is enabled for billable line types only.

**Extended Price**

Extended Price contains the price of a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden. Extended Price is enabled for billable line types only.

**Employee ID (Labor Only)**

Employee ID contains the employee Base Price associated with the technician. The Employee ID defaults to the technician assigned to the service call.
Earnings Type ID (Labor Only)

Earnings Type ID associates the earnings type with the line item record. The default value is based on the value populated in Employee Maintenance (SD.007.00). The earnings type multiplier is included in the calculation for extended cost.

Work Location (Labor Only)

Work Location associates a work location identifier with the line item record. The default value is based on the value populated in Work Location ID from Employee Maintenance (02.250.00) in the Payroll module.

Tax ID

Tax ID assigns a tax identifier (tax group) to a line item. The tax ID defaults from Tax ID in Site Maintenance (SD.025.00). If the inventory is tax exempt, Taxable Amount is zero. Tax ID is enabled for billable line types only.

Taxable Amount

Taxable Amount displays the amount of a line item that is taxable. The taxable amount value defaults from Extended Price.

Tax Amount

Tax Amount displays the amount of sales tax for a specific line item. It is calculated by multiplying the tax percentages associated with a tax identifier or tax group by the taxable amount.

Service Date

Service Date contains the work date associated with the line item record. The default value is based on the start date of the service call. If the start date is not available, then the default value is based on the date the service call was originally processed. Service Date is used for running Generate Payroll Process (SD.302.00).

Vendor ID (Material Only)

Vendor ID contains the valid vendor identifier associated with the current record. If a vendor ID is entered, a purchase order is created in the Purchasing module.

PO Date (Material Only)

PO Date displays the purchase order date. Once Vendor ID is populated, PO Date is populated with the service call date.

Qty Ordered (Material Only)

Qty Ordered displays the quantity ordered for a specific item that was purchased on a purchase order.

Qty Received

Qty Received displays the quantity received for use when updating Receipts in the Purchasing module.

PO Number

PO Number displays the purchase order number for the items acquired with a purchase order. If Manual on PO Number Option in Service Series Setup Maintenance (SD.000.00) is selected, the user populates PO Number with a manual PO number. If Automatic is selected, the system populates PO Number after the invoice entry process.
Unit Cost

Unit Cost contains the unit cost of a line item. If an inventory item (material) with a valuation method of user-specified cost is selected, enter a unit cost. If the inventory item entered has a valuation method other than user-specified, the default cost is populated. For labor records, the default cost is the hourly rate entered in Employee Maintenance (SD.007.00).

Extended Cost

Extended Cost displays the cost based on the quantity times the unit cost for material. For labor, the extended cost is work hours times hourly rate times the earnings type multiplier.

Task

Task associates a line item to a specific task set up in the Project Controller module. Task is enabled only when the line type is set to Project.

Contract ID (Line Item)

Contract ID associates a line item with a service contract in the Service Contracts module. Contract ID is enabled only when the line type is set to Service Contract.

Equipment ID

Equipment ID links a piece of equipment to the line item. Equipment identifiers may be entered in any line type. If populated, costs associated with the line item record update the Equipment History table.

Rev Acct

Rev Acct contains the default revenue account from the inventory item. If the line type is Billable, the revenue account defaults.

Rev Sub

Rev Sub contains the subaccount for a line item. The default subaccount is based on the Use Sub from Site setting in Call Type Maintenance (SD.003.00). If Use Sub from Site is checked, the subaccount defaults from Site Maintenance (SD.025.00). If Use Sub from Site is not checked, the subaccount defaults from the call type. If the line type is Service Contract, the subaccount defaults from the accrued liability subaccount.

COGS Acct

COGS Acct contains the default COGS account from the inventory item.

COGS Sub

COGS Sub contains the subaccount for a line item. The default subaccount is based on the Use Sub from Site setting in Call Type Maintenance (SD.003.00). If Use Sub from Site is checked, the subaccount defaults from Site Maintenance (SD.025.00). If Use Sub from Site is not checked, the subaccount defaults from the call type. If the line type is Service Contract, the subaccount defaults from the accrued liability subaccount.

Profit

Profit displays the dollar profit earned on a single line item.

Profit %

Profit % displays the percent of profit earned on a single line item.
Labor Class (Labor Only)

**Labor Class** associates a labor class with the line item record. The default is the Labor Class input in *Employee Position/Rate Maintenance* (58.290.00) with an effective date closest to, but not greater than, the date entered for the project input. If a record is not found for the project input, (for example, if Project is blank) the default labor class is used. Possible values for this required field may be viewed and selected by pressing F3.

*Note:* This field is only visible if *Payroll Integration* in *Service Series Setup Maintenance* (SD.000.00) is set to Advanced Payroll.

Union ID (Labor Only)

**Union ID** associates a union ID code with the line item record. It defaults to the union code input in *Employee Position/Rate Maintenance* (58.290.00) with an effective date closest to, but not greater than, the week-ending date. The default Employee Project Rate (PJEMPPJT) record (where Project is blank) is always used to retrieve the default union but may be overwitten. Possible values for this optional field may be viewed and selected by pressing F3.

*Note:* This field is only visible if *Payroll Integration* in *Service Series Setup Maintenance* (SD.000.00) is set to Advanced Payroll.

Shift

**Shift** associates a shift code with the line item record. This is an optional field.

*Note:* This field is only visible if *Payroll Integration* in *Service Series Setup Maintenance* (SD.000.00) is set to Advanced Payroll.

Cert PR

**Cert PR** is used to exempt a line item from prevailing wage rate consideration. No is the default if the project does not have a prevailing wage ID associated with it and cannot be modified. For projects that have a prevailing wage ID associated with them, this setting defaults to Yes but may be changed for a particular line item that is not eligible for prevailing wage rates.

*Note:* This field is only visible if *Payroll Integration* in *Service Series Setup Maintenance* (SD.000.00) is set to Advanced Payroll.

Group

**Group** is a modifier or subclass of a labor class for projects that contain a prevailing wage ID. The default for this optional field is the group code input in *Employee Position/Rate Maintenance* (58.290.00) with an effective date closest to, but not greater than, the week-ending date. The default Employee Project Rate record (where Project is blank) is always used to retrieve the default group code, but may be overwitten.

*Note:* This field is only visible if *Payroll Integration* in *Service Series Setup Maintenance* (SD.000.00) is set to Advanced Payroll.

Prev Code

**Prev Code** identifies the prevailing wage that should be used to default the rate. Prevailing Wage is a general heading for the government’s regulations and controls on the pay rates for certain laborers (trades or crafts) performing work under contracts covered by federal and/or state regulations and guidelines. The combination of prevailing wage code, labor class, and group (an optional subclass of labor class) must be unique for Prevailing Wage Rate table (PJWAGEPR). Use *Prevailing Wage Rate Maintenance* (58.280.00) to view and maintain prevailing wage codes. Each line item record must contain a “Y” in Cert PR to be eligible for a prevailing wage rate. **Prev Code** is display-only when project is entered, enabled if there is no project and line item record is eligible for prevailing wage (Cert PR = Y).
**Data Entry Screens**

**Note:** This field is only visible if **Payroll Integration** in Service Series Setup Maintenance (SD.000.00) is set to Advanced Payroll.

**Work Comp**

**Work Comp** identifies a particular worker’s compensation type for the wages to be paid and must first be set up in Workers’ Compensation Maintenance (02.380.00).

**Note:** This field is only visible if **Payroll Integration** in Service Series Setup Maintenance (SD.000.00) is set to Advanced Payroll.

**Work Type**

**Work Type** defines a work category within the labor class for union workers. The default for this optional field is the Work Type input in Employee Position/Rate Maintenance (58.290.00) with an effective date closest to, but not greater than, the week-ending date. The default Employee Project Rate record (where Project is blank) is always used to retrieve the default work type but may be overwritten.

**Note:** This field is only visible if **Payroll Integration** in Service Series Setup Maintenance (SD.000.00) is set to Advanced Payroll.

**Invoiced**

**Invoiced** will appear in the left-most field when the cursor is positioned on a record that has been processed through Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00).

**PO Created**

**PO Created** will appear in the next field when the cursor is positioned on a record that has had a purchase order created via the Generate Inventory (SD.306.00) process.

**PR Created**

**PR Created** will appear in the third field when the cursor is positioned on a record that has either:

- Been processed by the Generate Payroll (SD.302.00) process, or
- Been originally created in the Payroll or Advanced Payroll module

**Note:** This status is only applicable when **Payroll Integration** in Service Series Setup Maintenance (SD.000.00) is set to either Payroll or Advanced Payroll.

**Rcpt Created**

**Rcpt Created** will appear in the fourth field, immediately to the right of the **Cancel** button, when a receipt for a purchase order has been created via the Generate Inventory (SD.306.00) process.

**Inventory Posted**

**Inventory Posted** will appear in the right-most field when the record has had its inventory costs booked by any of the following:

- Service Call Invoice (SD.640.00)
- Service Call Invoice (SSRS) (SD.643.00)
- Generate Inventory (SD.306.00)

**OK (button)**

**OK** closes the screen and saves any changes.

**Cancel (button)**

**Cancel** prompts you to save your changes and closes the screen.
Service Call - Problem Code Entry (SD.407.00)

Service Call - Problem Code Entry (SD.407.00) assigns an unlimited number of problem codes to a service call. Access Service Call - Problem Code Entry (SD.407.00) by clicking Problems in Dispatch (SD.201.00).

Following are the field descriptions for Service Call - Problem Code Entry (SD.407.00).

**Service Call ID**
Service Call ID selects a service call identifier for assigning problem codes to a service call.

**Problem ID**
Problem ID contains the code that describes the reason a service call is issued. The description of identifier displays to the right of Problem ID.

**Technician ID**
Technician ID contains the technician assigned to this problem. The technician’s first and last names display to the right of Technician ID.

**Duration**
Duration contains the estimated time required to fix this problem.

**Contract ID**
Contract ID contains the contract that applies to the servicing of this problem.

**Equip ID**
Equip ID contains the equipment to be serviced on this service call.

**Warranty Start**
Warranty Start contains the start date of the warranty.
Warranty End

_Warrant End_ contains the end date of the warranty.

Serial Nbr

_Serial Nbr_ displays the serial number of the equipment.

Notes

_Notes_ contains miscellaneous information about the call. Longer notes can be recorded using the _Notes/Attachments_ icon.

Cause ID

_Cause ID_ contains the root cause of the problem.

Resolution ID

_Resolution ID_ contains the resolution of the problem.

OK (button)

_OK_ closes the screen and saves the entry.
Graphical Dispatch Board (SD.900.00)

Use the Graphical Dispatch Board (SD.900.00) to review dispatch information.

Graphical Dispatch Board (SD.900.00), Options Tab

Use the Graphical Dispatch Board (SD.900.00), Options tab to select the Call Queue ID from Dispatch - View Maintenance (SD.004.00) that determines the data to display on the Graphical Dispatch Board (SD.900.00). The General tab contains a display-only view of the filter parameters of the selected Queue ID.

![Graphical Dispatch Board (SD.900.00), Options tab](image)

Figure 139: Graphical Dispatch Board (SD.900.00), Options tab

Following are the field descriptions for the Options tab of Graphical Dispatch Board (SD.900.00).

**Queue ID**

Queue ID contains the call queue identifier used to filter the service calls to be displayed. The queue ID can be typed in directly, or can be selected from a list of all queue IDs set up in Dispatch - View Maintenance (SD.004.00) by pressing F3 or double-clicking the right mouse button.

**Note:** If Queue ID is blank, Graphical Dispatch Board (SD.900.00) displays all open service calls by default.

**Description**

Description contains an explanation of the selected queue identifier.

**Priority**

Priority contains the priority code selections of Queue ID.
Branch ID
Branch ID contains the Branch ID filter of Queue ID.

All
All indicates whether Queue ID is selecting all Branch IDs. If it is marked with an ‘x’, then all Branch IDs are selected.

Geographic ID
Geographic ID contains a list of geographic zone IDs included in the queue ID filter. Note that if no geographic zone ID is included in Queue ID, no geographic zones are selected for display. This is different than how the queue ID filter works for Dispatch (SD.201.00). If the queue ID has no geographic zones listed, Dispatch (SD.201.00) displays all geographic zone IDs.

Note: To display service calls that have blank geographic zones, leave Queue ID blank. Graphical Dispatch Board (SD.900.00) will displays all open service calls by default, including service calls with blank geographic zones.

Description
Description contains an explanation of the Geographic ID.
Graphical Dispatch Board, Dispatch Board Tab

Graphical Dispatch Board (SD.900.00), Dispatch Board tab consists of two major areas. The top section has tabs representing each employee class. This area is divided into two sections:

- **Technician pane** — Located on the left side of the window, the technician pane lists the technicians that are available to be assigned to problem codes on service calls that match the filter criteria from Queue ID on the Options tab. The list is grouped by employee class. Graphical Dispatch Setup Maintenance (SD.902.00) provides the option to turn off the display of the employee class label.

- **Schedule pane** — The color-coded schedule pane on the right side of the window has two view formats, (1) Day View, and (2) Week View. You can switch from one view to the other by right-clicking on the date bar and selecting the view you desire. Task bars representing either the time commitment for a problem code or the unavailability of a technician appear in this area. Technician class tabs at the bottom give you the ability to see the board for all technicians or filtered for only the technicians within a specific employee class.

- **Service call details pane** — The bottom section is the service call details pane. A service call appears only once on each task status tab regardless of how many problem codes on the service call have that status. If a service call has multiple problem codes with different status values, it appears once on each task status tab for each problem code status. The task status tabs represent the status codes available to problem codes and cannot be edited.

**Note:** Service calls without problem codes are displayed on the Unassigned tab.

![Figure 140](image-url)
Following are the field descriptions for the **Dispatch Board** tab of *Graphical Dispatch Board* (SD.900.00).

**Technician**

To view information about service calls that are assigned to a particular technician, type the technician’s ID in **Technician** or press F3 to select the technician ID from the *Employee Maintenance PV List*.

**Note:** If you select a technician ID and then refresh the *Graphical Dispatch Board* (SD.900.00), the **Technician** tab appears in the technician class tabs.

**Include Queue Filters** (check box)

**Include Queue Filters** indicates whether the filter criteria defined for the queue identification number in **Queue ID** on the **Options** tab is applied to service calls that display in the schedule pane and service call details pane Queue filters do not affect the **Unassigned** tab.

**Note:**

- The **Unassigned** tab displays all service calls that are not assigned to a technician.
- The **Technician** tab displays as the last item in the technician class tabs when a technician identification code is specified in **Technician**, which is located above the schedule pane and the *Graphical Dispatch Board* (SD.900.00) is refreshed.
Refresh (button)
Clicking **Refresh** causes the system to refresh the schedule pane with any changes made to problem code information.

**Note:** To refresh a tab in the service call detail pane of the *Graphical Dispatch Board* (SD.900.00), click on a different tab and then back on the tab you want to refresh.

Search (button)
Clicking **Search** opens *Service Call Search* (SD.900.02).

**Graphical Dispatch Board, Technician Pane**

**Technician**
**Technician** contains the employee IDs from *Employee Maintenance* (SD.007.00) for all technicians included in **Queue ID** entered in the *Graphical Dispatch Board* (SD.900.00), **Options** tab. Technician class tabs appear below **Technician** for each employee class set up in *Employee Class Maintenance* (SD.006.00), as well as a tab for all employee classes. When a technician identification code is specified in the **Technician** box located above the schedule pane and the *Graphical Dispatch Board* (SD.900.00) is refreshed, a **Technician** tab appears last. Selecting a tab causes problem codes assigned to technicians for the employee class or for the technician to display in the schedule pane.

**Note:**
- technicians are grouped by employee class when employee class labels are displayed in *Graphical Dispatch Setup Maintenance* (SD.902.00).
- Right-clicking the technician causes the following Technician menu to open which allows you to send an email message to the technician.

![Send Technician E-mail](image)

*Figure 142: Technician menu*

**Calls**
**Calls** contains the total number of problem codes to which the technician has been assigned for the day being viewed. A technician may be assigned to multiple problem codes on a single service call.

**Duration**
**Duration** contains the total amount of time for all problem codes assigned to the technician on the day being viewed, including travel time.

**Zone**
**Zone** contains the geographic zone where a technician is currently located. **Zone** is populated if the technician has a call with a status of In-Route or WIP. A technician can only have one call In-Route or WIP at a time. The geographic zone for a customer site is defined on *Site Maintenance* (SD.025.00).

**Assigned Zone(s)**
**Assigned Zone(s)** contains the geographic zones to which the technician is assigned. Geographic zone assignments are made using either *Employees - Geographic Zones* (SD.039.00) or *Geographic Zone - Employees* (SD.038.00).
Graphical Dispatch Board, Schedule Pane

The schedule pane contains the start time, finish time, and duration of each problem code for which a technician has been assigned in a graphical format. Problem codes do not appear in the schedule pane if they are not associated with a technician or do not have a start time and a duration greater than zero. Each problem code for a particular service call is assigned a line ID. The line ID corresponds to the line number of the problem code in the Problem Code grid on Service Call Entry (SD.200.00).

The schedule pane has two view formats, (1) Day View, and (2) Week View. You can switch from one view to the other by right-clicking on the date bar and selecting the view you desire:

![Graphical Dispatch Board (SD.900.00), Dispatch Board tab, Date bar menu](image)

The day you are currently viewing appears on the schedule pane date bar. You can navigate to different days by pressing the arrows on either side of the date bar or by right-clicking on the date bar. When you right-click the date bar, the Date bar menu appears listing the seven days prior and seven days after the currently displayed date (if you are in Day View), a listing of the seven weeks prior to and seven weeks after the current week (if in Week View), a Today option, a Go To option and options to switch between the Day View and Week View. Selecting Go To displays a calendar from which you may select any date to move to.

The schedule pane also displays task bars representing technician status when the technician is not available for assignments. Use Status in Employee Maintenance (SD.007.00) or Employee Schedule (SD.904.00) to indicate when a technician is not available for assignments.

The schedule pane task bars have the following features:

- Color-coded task bars allow quick determination of the status of a problem code. A problem code appears on the schedule pane if the status of the problem is something other than Unassigned. The color scheme for the task bars is determined in Graphical Dispatch Setup Maintenance (SD.902.00).
• Color-coded task bars also allow the quick determination of the status of a technician. Technician status can be set via Employee Maintenance (SD.007.00) for all dates or via Employee Schedule (SD.904.00) for a limited date range. The color scheme for the task bars is determined in Graphical Dispatch Setup Maintenance (SD.902.00). Technician status values that can be displayed as a bar in the schedule pane include:
  - Vacation
  - Sick
  - Personal
  - Training

• Task bar text quickly provides basic information. If the task bar represents a technician’s status, the text displayed on the task bar is the technician’s service employee ID and status. If the task bar represents a problem code, the text displayed on the task bar is determined by the selection made from the following options in Graphical Dispatch Setup Maintenance (SD.902.00):
  - ServiceCallID: Line ID
  - FaultCodeID: Line ID (Note: The FaultCodeID is the same as the Problem Code ID)
  - CallerName: Phone
  - CallerName: Addr1 (Note: Addr1 is Address Line 1 from the customer site)
  - Status: FaultCodeID: Line ID
  - Addr1

• Double left-clicking the task bar for a problem code causes Graphical Dispatch - Assign Technician (SD.901.00) to open.

• Allowing the mouse pointer to hover over a problem code task bar causes a tool tip to appear displaying the following information:
  - Problem Code status
  - Zone ID
  - Company ID
  - Caller Name
  - Customer Name
  - Address Line 1
  - City
  - Zip Code
  - Phone Number

• Allowing the mouse pointer to hover over a task bar representing a technician’s status causes a tool tip to appear displaying the technician’s service employee ID and the technician’s status.
• When you right-click over a problem code task bar, the task bar menu appears.

![Figure 144: Problem code task bar menu](image)

From this menu you can open the following:
- Service Call Entry (SD.200.00)
- Service Call Status Log (SD.027.00)
- Customer Site Location (SD.905.00)
- Invoice Entry (SD.202.00)
- Service Call History (SD.301.00)
- Service Contract Summary (SD.900.01)
- Service Call Search (SD.900.02)
- Service Call Workorder (SD.625.00)
- Technicians Page (SD.903.00)
- Outlook to send an email message to the customer
- Outlook to send an email message to the technician
- Employee Maintenance (SD.007.00)
- Employee Schedule (SD.904.00)

• When you right-click over a task bar representing a technician’s status, the technician status task bar menu appears.

![Figure 145: Technician status task bar menu](image)
From this menu you can open the following:
- *Service Call Workorder* (SD.625.00)
- *Technicians Page* (SD.903.00)
- Outlook to send an email message to the customer
- Outlook to send an email message to the technician
- *Employee Maintenance* (SD.007.00)
- *Employee Schedule* (SD.904.00)

In addition to the selections above, the menu also provides the capability to adjust the relative “vertical” position of overlapping task bars. For example, if you believe a task bar is hiding another task bar beneath, right-click on the task bar you can see and select Send to Back. Any task bars hiding beneath the task bar you right-clicked on will now appear above it.

Use your mouse to adjust the start or end time of the problem code. This action also changes the duration of the task. To adjust the start or end time, move the mouse pointer over the left or right end of the bar until you see it change to a double-arrow. When the mouse pointer is a double-arrow, press and hold the left mouse button, drag the bar to the desired location, and release the mouse button.

Use your mouse to move the entire task bar to another location. To perform this task, place the mouse pointer on top of the task bar you wish to move, press and hold the left mouse button, drag the bar to the new location, and release the mouse button.

Problem codes can be reassigned to another technician by dragging and dropping the task bar. Place the mouse pointer on top of the task bar you wish to move, press and hold the left mouse button, drag the bar to the new technician, date, and time, and release the mouse button.

**Note:** Problem codes with a status of *WIP* or *Completed* cannot be reassigned using drag-and-drop, nor can the bar be moved to another position on the same technician. Use *Graphical Dispatch - Assign Technician* (SD.901.00) to make these changes.

### Graphical Dispatch Board, Service Call Details Pane

The service call details pane contains information about individual service calls regardless of status. Right-click on a detail line to view the service call details pane menu.

![Service call details pane menu](image)

*Figure 146: Service call details pane menu*

Use this menu to open:
- *Service Call Entry* (SD.200.00)
- *Service Call Status Log* (SD.027.00)
- *Customer Site Location* (SD.905.00)
- *Invoice Entry* (SD.202.00)
- *Service Call History* (SD.301.00)
- *Service Contract Summary* (SD.900.01)
- *Service Call Workorder* (SD.625.00)
- *Technicians Page* (SD.903.00)
Additional information about the service call details pane:

- All task status tabs of the service call details pane, except the **Assigned** tab, show service calls for all dates. On the **Assigned** tab, you see only service calls with problem codes assigned on the date currently on view in the schedule pane.

- The **Unassigned**, **Assigned**, **In-route**, **WIP**, and **Incomplete** tab labels include the number of service calls for each status.

- All task status tabs show service calls for a technician except the **Unassigned** tab when a technician identification code is specified in **Technician** and the **Graphical Dispatch Board** (SD.900.00) is refreshed. The **Unassigned** tab shows service calls that have problem codes that are not assigned to a technician.

**Note:** Consider using Customization Manager to change the **User 1**, **User 2**, **User 3**, and **User 4** tab names and the corresponding Task Status options in **Service Call Entry** (SD.200.00) to capture task status indicators that are important to your organization. See your Microsoft Dynamics SL system administrator if you need assistance.

**Service Call ID**

**Service Call ID** contains the service call identifier. An ellipsis button (...) appears in the next column when a service call is displayed in the service call details pane grid. Pressing the ellipsis button opens **Graphical Dispatch - Assign Technician** (SD.901.00).

**Company ID**

**Company ID** contains the identification code of the company associated with the service call.

**Customer ID**

**Customer ID** contains the customer ID of the service call. An ellipsis button (...) appears in the next column when a service call is displayed in the service call details pane grid. Pressing the ellipsis button opens **Customer Maintenance** (08.260.00).

**Site ID**

**Site ID** contains the site ID of the service call. An ellipsis button (...) appears in the next column when a service call is displayed in the service call details pane grid. Pressing the ellipsis button opens **Site Maintenance** (SD.025.00).

**Promise Date**

**Promise Date** contains the promise date of the service call.

**From Time**

**From Time** contains the promise from time of the service call.

**To Time**

**To Time** contains the promise to time of the service call.

**Terms ID**

**Terms ID** contains the terms identifier of the service call.

**PM**

**PM** contains a P if the service call was generated from a service contract PM schedule.

**Call Type**

**Call Type** contains the call type of the service call.
Priority
Priority contains the priority of the service call.

Caller Name
Caller Name contains the name of the person who called in the service call specified in Caller Name on the Other Info tab of Service Call Entry (SD.200.00).

Name
Name contains the name of the customer for the service call displayed on the Service Call Info tab of Service Call Entry (SD.200.00).

Addr 1
Addr 1 contains the first address line of the customer site associated with the service call.

Addr 2
Addr 2 contains the second address line of the customer site associated with the service call.

City
The city where the customer site associated with the service call is located. If you are unable to view the City column, close Graphical Dispatch Board (SD.900.00), locate the file ServCall.dte on your workstation, delete the file, and open Graphical Dispatch Board (SD.900.00) again. Refer to “Using Graphical Dispatch Board (SD.900.00)” on page 27 for more information about customizing the appearance of the service call details pane grid.

Zip
Zip contains the zip code of the customer site associated with the service call.

Phone
Phone contains the phone number of the customer site associated with the service call.

Geo Zone
Geo Zone contains the geographic zone of the customer site associated with the service call.

Default Technician
Default Technician contains the name of the technician assigned to the service call specified in Primary Tech on the Service Call Info tab of Service Call Entry (SD.200.00).

Map Page
Map Page contains the map page of the customer site associated with the service call.

Map Coord
Map Coord contains the map coordinate of the customer site associated with the service call.

Contract ID
Contract ID contains the ID of the contract as entered in Service Call Entry (SD.200.00) for the service call.

Contract Type
Contract Type contains the type of contract associated with the service call.
Project ID
Project ID contains the project identifier as entered in Service Call Entry (SD.200.00) for the service call.

Unassigned (Tab)
Unassigned contains service calls that have problem codes with a status of Unassigned or no problem code at all. Note that a technician may be associated with a problem code and still have a status of Unassigned.

Assigned (Tab)
Assigned contains service calls that have problem codes with a status of Assigned. Note that service calls are only displayed on this tab if the problem code assignment date is for the current Gantt chart date.

In-route (Tab)
In-route contains service calls that have problem codes with a status of In-route.

WIP (Tab)
WIP contains service calls that have problem codes with a status of WIP.

Completed (Tab)
Completed contains service calls that have problem codes with a status of Completed.

P/U Parts (Tab)
P/U Parts contains service calls that have problem codes with a status of P/U Parts.

Parts-out (Tab)
Parts-out contains service calls that have problem codes with a status of Parts-out.

Parts-in (Tab)
Parts-in contains service calls that have problem codes with a status of Parts-in.

Hold (Tab)
Hold contains service calls that have problem codes with a status of Hold.

Incomplete (Tab)
Incomplete contains service calls that have problem codes with a status of Incomplete.

User 1 (Tab)
User 1 contains service calls that have problem codes with a status of User 1.

Note: Consider using Customization Manager to change the User 1 tab name to reflect a task status that is important to your organization. See your Microsoft Dynamics SL system administrator if you need assistance.

User 2 (Tab)
User 2 contains service calls that have problem codes with a status of User 2.

Note: Consider using Customization Manager to change the User 2 tab name to reflect a task status that is important to your organization. See your Microsoft Dynamics SL system administrator if you need assistance.
User 3 (Tab)

User 3 contains service calls that have problem codes with a status of User 3.

Note: Consider using Customization Manager to change the User 3 tab name to reflect a task status that is important to your organization. See your Microsoft Dynamics SL system administrator if you need assistance.

User 4 (Tab)

User 4 contains service calls that have problem codes with a status of User 4.

Note: Consider using Customization Manager to change the User 4 tab name to reflect a task status that is important to your organization. See your Microsoft Dynamics SL system administrator if you need assistance.
Screens That Interact with Graphical Dispatch Board (SD.900.00)

The following existing screens are used by Graphical Dispatch Board (SD.900.00):

- Dispatch - View Maintenance (SD.004.00)
- Service Call Entry (SD.200.00)
- Employee Class Maintenance (SD.006.00)
- Employee Maintenance (SD.007.00)

Dispatch - View Maintenance (SD.004.00)

Open Dispatch - View Maintenance from the Graphical Dispatch Board (SD.900.00) Options tab. You must select at least one Geo Zone in the Queue ID. If the Queue ID in Geography (SD.004.01) is empty, no data is selected for the Graphical Dispatch Board (SD.900.00). At least one Geo Zone is REQUIRED by Graphical Dispatch Board (SD.900.00).

Note: An exception occurs when Queue ID on the Graphical Dispatch Board (SD.900.00) Options tab is blank. Graphical Dispatch Board (SD.900.00) pulls in all open service calls and technicians regardless of geographic zone.

The Graphical Dispatch Board (SD.900.00) does not use the following parameter from Dispatch - View Maintenance (SD.004.00):

- Sort Order

Service Call Entry (SD.200.00)

Graphical Dispatch Board (SD.900.00) operates at the problem code level rather than at the service call level. Service Call Entry (SD.200.00) has an area in the lower portion of the screen labeled Service Call - Problems where problem codes for a service call are entered. Information entered in this area is available to Graphical Dispatch Board (SD.900.00).

Employee Class Maintenance (SD.006.00)

The values created in Employee Class Maintenance (SD.006.00) appear at the bottom of the schedule pane. This allows you to only view technicians in a specific employee class. A maximum of 20 employee class entries can be displayed on Graphical Dispatch Board (SD.900.00). If more than 20 employee classes are set up, only the first 20 entries (determined alphabetically) are used by Graphical Dispatch Board (SD.900.00).

Employee Maintenance (SD.007.00)

Status on Employee Maintenance (SD.007.00) controls how an employee is displayed in the Graphical Dispatch Board (SD.900.00) schedule pane. If the employee’s status is Active, the employee is available for assignments unless specific dates are blocked out via Employee Schedule (SD.904.00).

If an employee’s status in Employee Maintenance (SD.007.00) is Inactive, the employee does not appear in Graphical Dispatch Board (SD.900.00). If the employee’s status is Vacation, Sick, or Personal, a task bar appears across all days and times of the Graphical Dispatch Board (SD.900.00) schedule pane indicating that the employee is not available for assignments.
Service Contract Summary (SD.900.01)

Service Contract Summary (SD.900.01) appears when you right-click in a service call details line on the Graphical Dispatch Board (SD.900.00), and then select Service Contract Summary from the menu that appears. This screen provides a condensed view of information about the service contract associated with the service call task.

![Service Contract Summary (SD.900.01)](Image)

Figure 147: Service Contract Summary (SD.900.01)

Following are field descriptions for Service Contract Summary (SD.900.01).

**Contract**

*Contract* lists the identification code assigned to the service contract.

**Branch ID**

*Branch ID* contains the identification code assigned to the customer’s branch location.

**Contract Type**

*Contract Type* shows the category of the service contract.

**Contract Amount**

*Contract Amount* contains the total value of the service contract.

**Priority**

*Priority* lists the level of importance when service calls are received for work covered by the contract.

**Start Date**

*Start Date* shows the date the contract began.

**End Date**

*End Date* contains the last date of the contract.

**Salesperson ID**

*Salesperson ID* lists the identifier of the salesperson assigned to the service contract.

**Primary Tech**

*Primary Tech* shows the identification code assigned to the service technician who normally performs works for the service contract.

**Secondary Tech**

*Secondary Tech* contains the identifier of the service technician who is the substitute for the primary technician assigned to the service contract.
Service Call Search (SD.900.02)

Use Service Call Search (SD.900.02) to look for problem codes of open service calls. You can perform the search by customer, technician, service contract, and priority. Problem codes that match the selection criteria are displayed in the Graphical Dispatch Board (SD.900.00) schedule pane and service call details pane.

![Service Call Search (SD.900.02)](image)

Figure 148: Service Call Search (SD.900.02)

Following are field descriptions for Service Call Search (SD.900.02).

**Search Criteria Area**

Use to select which problem codes of open service calls display on the Graphical Dispatch Board (SD.900.00).

**Specific Customer ID**

Specific Customer ID indicates problem codes for the specified customer identification code are included in the search.

All Customers

All Customers indicates problem codes for all customer identification codes are included in the search.

**Enable Contract Based Search**

Enable Contract Based Search indicates problem codes associated to a service contract are the only problem codes included in the search.

**Specific Contract ID**

Specific Contract ID indicates problem codes for the specified service contract identification code are included in the search.

Any Contract

Any Contract indicates problem codes for all service contract identification codes are included in the search.
Specific Technician
Specific Technician indicates problem codes for the specified technician identification code are included in the search.

All Technicians
All Technicians indicates problem codes for all technician identification codes are included in the search.

Priority Area
Priority indicates problem codes for the selected level of importance are included in the search. Valid priorities are:

- All – problem codes for all priorities are included in the search
- Premium – problem codes with the Premium priority are included in the search
- High – problem codes with the High priority are included in the search
- Medium – problem codes with the Medium priority are included in the search
- Low – problem codes with the Low priority are included in the search
- None – problem codes with no priority assigned are included in the search

Search (button)
Click Search to display problem codes for open service calls on the Graphical Dispatch Board (SD.900.00) based on the selection criteria entered.

Select (button)
Click Select to choose a problem code displayed on the Graphical Dispatch Board (SD.900.00) schedule pane and service call details pane.

Customer ID
Customer ID contains the customer identification code associated to the problem code.

Service Call ID
Service Call ID contains the service call identification code associated to the problem code.

Problem ID
Problem ID contains the problem code identification code assigned to the problem code.

Technician ID
Technician ID contains the technician identification code associated to the problem code.

Contract ID
Contract ID contains the service contract identification code associated to the problem code.

Start Date
Start Date contains the date the problem code is to begin.

Start Time
Start Time contains the time the problem code is to begin.
**Priority**

*Priority* contains the level of importance assigned to the problem code. Valid priorities are:

- Premium
- High
- Medium
- Low
- Blank
Graphical Dispatch - Assign Technician (SD.901.00)

Use Graphical Dispatch - Assign Technician (SD.901.00) to assign a technician to a task. Technicians are assigned to individual problem codes on a service call. It is the individual problem code assignment that is managed on the Graphical Dispatch Board (SD.900.00), not the primary technician assignment made at the service call level.

You can access the screen by either double-clicking while the mouse pointer is above a problem code task bar in Graphical Dispatch Board (SD.900.00) or by clicking on the ellipsis (…) button in the service call ID field in the Graphical Dispatch Board (SD.900.00) service call details pane.

You can add problem codes to a service call using Graphical Dispatch - Assign Technician (SD.901.00). You can also use the screen to delete problem codes from a service call.

You can update the following fields on Graphical Dispatch - Assign Technician (SD.901.00):

- Problem ID
- Technician ID
- Status
- Start Date
- Start Time
- Travel Time
- Duration
- Equip ID
- PM Code
- Contract ID

![Graphical Dispatch - Assign Technician (SD.901.00)](image)

Figure 149: Graphical Dispatch - Assign Technician (SD.901.00)

Following are field descriptions for Graphical Dispatch - Assign Technician (SD.901.00).

**Service Call ID**

Service Call ID contains the service call identifier associated with the problem code.

**Promised Date**

Promised Date contains the promise date of the service call.
Problem ID

Problem ID contains the problem code ID. You can change an existing problem code or add a new one to the grid by typing the desired problem code ID directly in the cell, by pressing F3, or by double-clicking in Problem ID to access a list of problem code IDs.

Technician ID

Technician ID contains the employee ID from Employee Maintenance (SD.007.00) of the technician assigned to work on the problem code. You may change an existing technician ID or add a new one to the grid by typing the desired technician ID directly in the cell, by pressing F3, or by double-clicking in the field to access a list of technician IDs.

Status

Status contains the status of the problem code, not the service call as a whole. Available status codes are:
- Unassigned
- Assigned
- In-route
- WIP
- Competed
- P/U Parts
- Parts-Out
- Parts-In
- Hold
- Incomplete

Start Date

Start Date contains the date work started, or is expected to start. The date can be changed manually or by using the mouse pointer to adjust the position of the task bar on the Graphical Dispatch Board (SD.900.00) schedule pane representing this problem code.

Start Time

Start Time contains the time when work on this problem code is expected to begin. Note that time must be typed in 24-hour, or military time, format. For example, 1:00PM is entered as 13:00. You can also change Start Time using the mouse pointer to move either (1) the entire task bar on the Graphical Dispatch Board (SD.900.00) schedule pane representing this problem code, or (2) the leading edge of the task bar.

Travel Time

Travel Time contains the amount of time the technician needs for travel to the work location. Graphical Dispatch Setup Maintenance (SD.902.00) provides a default value entered either for all tasks or just for the first problem code on each service call for each technician.

Duration

Duration contains the total amount of time the technician will be spending on the problem code in one continuous effort, including travel time. Note that if a problem code cannot be completed in one continuous effort, enter multiple problem codes to allow the tracking of each instance when the technician is working on the problem code.

End Date

End Date contains the calculated date work on the problem code is expected to be completed.
End Time

End Time contains the calculated time when work on the problem code is expected to complete. Note that time must be typed in 24-hour, or military time, format. For example, 1:00PM is entered as 13:00.

Equip ID

Equip ID contains the equipment identifier from Equipment Entry (SE.001.00). Equip ID is an optional field that allows the tracking of work by equipment ID for later reporting and analysis. This information is also available for printing on the work order given to the technician. You may change an existing equipment ID or enter one by typing the desired ID directly in the cell, by pressing F3, or by double-clicking with the right mouse button in the field to access a list of equipment IDs.

PM Code

PM Code contains the preventive maintenance code from PM Code Maintenance (SE.002.00). PM Code is an optional field that allows the linking of the work being completed to a specific preventive maintenance requirement. This information is also available for printing on the work order given to the technician. You may change an existing PM code or enter one by typing the desired PM code directly in the cell, by pressing F3, or by double-clicking with the right mouse button in PM Code to access a list of PM codes. Typically, this field is filled in automatically when a service call is generated from a service contract PM schedule.

Contract ID

Contract ID contains the contract identifier from Service Contract Entry (SN.001.00). Contract ID is an optional field that allows the linking of the work being done to a specific service contract. This information is also available for printing on the work order given to the technician. You may change an existing contract ID or enter one by typing the desired contract ID directly in the cell, by pressing F3, or by double-clicking with the right mouse button in the field to access a list of contract IDs.

OK (button)

Clicking OK causes the changes to be saved. The screen is closed and you are returned to Graphical Dispatch Board (SD.900.00).

Cancel (button)

Clicking Cancel causes any changes you have made to be canceled. The screen is closed and you are returned to Graphical Dispatch Board (SD.900.00).
Inquiry Screens Overview

The Service Dispatch module is designed to track every detail of a service organization. Several inquiry screens exist in the system that enable users to effectively manage customers, equipment, and technicians. Customer Information (SD.202.01) displays the customer address, credit card information and accounts receivable aging balances during Invoice Entry (SD.202.00).

Service Dispatch gives customer service representatives the ability to view all open service calls for a customer site while entering service calls in Open Service Call (SD.200.02) as well as see the equipment associated with a customer site in Customer Equipment (SD.200.03). Service Call History (SD.301.00) gives users the ability to view all completed service calls for a customer site while Service Call Status Log (SD.027.00) gives users the ability to analyze the status changes of a service call.

Service Call Status Log (SD.027.00)

Service Call Status Log (SD.027.00) shows the changes made to a call’s status from the time a service call is created until it is completed. Open Service Call Status Log (SD.027.00) by clicking the ellipsis (…) to the left of Call Status in Service Call Entry (SD.200.00), Status Log in Dispatch (SD.201.00), or from the Service Dispatch menu.

Following are the field descriptions for Service Call Status Log (SD.027.00).

Service Call ID

Service Call ID contains the service call identifier associated with the selected service call.

Customer ID

Customer ID contains the customer identifier and customer name associated with the service call.

Site ID

Site ID contains the site identifier and site name associated with the selected call.
Call Status

Call Status associates the service call status identifier with a service call. Call Status defaults the status identifier from Dispatch (SD.201.00).

Date Changed

Date Changed contains the date information was changed on Service Call Status Log (SD.027.00).

Time Changed

Time Changed contains the time when information was changed on Service Call Status Log (SD.027.00).

User ID

User ID identifies the person making the change.

OK (button)

OK closes the screen and saves the entry.
Open Service Call (SD.200.02)

Open Service Call (SD.200.02) displays open calls for a particular company and customer or site, allowing you to stack calls. This button is only enabled if a site has at least one open service call record. To access Open Service Call (SD.200.02), click Open Calls in Service Call Entry (SD.200.00).

![Open Service Call (SD.200.02)](image)

Figure 151: Open Service Call (SD.200.02)

Following are the field descriptions for Open Service Call (SD.200.02).

**Service Call ID**

*Service Call ID* contains the service call identifier associated with the selected service call.

**Company ID**

*Company ID* defaults from the branch identifier entered in Service Call Entry (SD.200.00).

**Status**

*Status* indicates whether the service call is open or closed. *Status* is managed by the system and does not require user intervention.

**Date Promised**

*Date Promised* contains the date the call is expected to be complete.

**Promised Time From**

*Promised Time From* contains the approximate time a technician is expected to be at the customer site.

**Call Status ID**

*Call Status ID* contains the service call status identifier associated with a service call.

**Call Type ID**

*Call Type ID* displays the service call type identifier associated with a service call. *Call Type ID* defaults from Service Call Entry (SD.200.00).

**Caller Name**

*Caller Name* contains the contact name for the person calling in the service request. If a name was entered in *Attention* in Site Maintenance (SD.025.00), the value is shown in *Caller Name.*
Service Technician

Service Technician contains the technician assigned to the service call.

Select (button)

Select displays details about the open service call.

Cancel (button)

Cancel prompts you to save your changes and closes the screen.

Note: You can run a report that shows all open service calls. For more information, see “Open Service Call List (SD.620.00)” on page 509.
Customer Equipment (SD.200.03)

Customer Equipment (SD.200.03) displays all the equipment associated with a customer site. Open Customer Equipment (SD.200.03) by clicking Equipment in Service Call Entry (SD.200.00). Selecting a piece of equipment and clicking Details accesses Equipment Entry (SE.001.00) in the Equipment Maintenance module.

Figure 152: Customer Equipment (SD.200.03)

Following are the field descriptions for Customer Equipment (SD.200.03).

**Equipment ID**

Equipment ID contains the number assigned to this piece of equipment.

**Description**

Description contains the description of the equipment.

**Location**

Location indicates where the piece of equipment is located at the site.

**Serial Number**

Serial Number contains the unique manufacturer's number assigned to this piece of equipment.

**Status**

Status indicates whether the service call is open or closed. Status is managed by the system and does not require user intervention.

**Manuf ID**

Manuf ID identifies the manufacturer of this piece of equipment

**Model ID**

Model ID contains the manufacturer's model identification assigned to this piece of equipment.

**Equip Type**

Equip Type describes whether the equipment is owned or leased by the site.

**Warr Start Date**

Warr Start Date contains the first day of the warranty.
Warr End Date
Warr End Date contains the last day of the warranty.

OK (button)
OK closes the screen and saves any changes.

Details (button)
Selecting a piece of equipment and clicking Details accesses Equipment Entry (SE.001.00) in the Equipment Maintenance module.
Customer Information (SD.202.01)

*Customer Information* (SD.202.01) contains customer address, credit card, and aging information from Accounts Receivable. Open *Customer Information* (SD.202.01) by clicking **Billing Address** in *Invoice Entry* (SD.202.00).

![Customer Information (SD.202.01)](image)

**Figure 153: Customer Information (SD.202.01)**

Following are the field descriptions for *Customer Information* (SD.202.01).

**Customer ID**

*Customer ID* indicates the customer identifier.

**Name**

*Name* indicates the customer or site name.

**Salutation**

*Salutation* contains the first line of a letter used when corresponding with this customer.

**Address**

*Address* contains the street number and name of the customer.

**City**

*City* contains the city where the customer is located. The city name can be a maximum of 30 characters.

**State/Zip/Cntry**

*State* contains the two-character abbreviation for the state in which the customer is located; *Zip* is the zip code for the customer; *Cntry* is the country or region where the customer is located.

**Phone/Ext**

*Phone/Ext* contains the phone number and extension for the customer.

**Fax/Ext**

*Fax/Ext* contains the fax number and extension for the customer.

**Current Balance**

*Current Balance* contains the total amount due for this customer.
Future Balance
Future Balance contains the total dollar amount of invoices posted to future periods.

Credit Limit
Credit Limit contains the total amount of credit granted to this customer.

Credit Available
Credit Available contains the remaining credit available to this customer.

Current
Current contains the outstanding balance due as of the system date.

1 To 30
1 To 30 contains the outstanding balance from 1 to 30 days past due.

31 To 60
31 To 60 contains the outstanding balance from 31 to 60 days past due.

61 To 90
61 To 90 contains the outstanding balance from 61 to 90 days past due.

Over 90
Over 90 contains the outstanding balance over 90 days past due.

Credit Card Nbr
Credit Card Nbr contains the credit card number used to pay for service calls.

Type
Type indicates the type of credit card used, such as Visa, Master Card, etc.

Expiration Date
Expiration Date contains the expiration date of the credit card.

OK (button)
OK closes the screen and saves any changes.
Service Call History (SD.301.00)

Service Call History (SD.301.00) displays the history of completed service calls for a specific customer and site. You can drill down on a specific service call by selecting the desired call from the grid and clicking Call Details. The related invoice information is displayed by clicking Invoice. Click the Quick Send Inquiry button to view the details of the Quick Send requests created when an invoice is sent electronically based on the customer’s and any additional receivers’ preferences defined on the Accounts Receivable Customer Maintenance (08.260.00), Quick Send tab. Open Service Call History (SD.301.00) by clicking Service History in Service Call Entry (SD.200.00), History in Dispatch (SD.201.00) or from the Service Dispatch menu.

Note: You can run a report that shows service call history. For more information, see “Service Call History (SD.622.00)” on page 514.

Following are the field descriptions for Service Call History (SD.301.00).

Cust ID
Customer ID contains the name of the customer.

Site ID
Site ID contains the site of the service call. When the identifier is entered, the site name appears to the right of Site ID.

Service Call ID
Service Call ID contains the service call identifier associated with the selected service call.

Company ID
Company ID defaults from the branch identifier entered in Service Call Entry (SD.200.00).

Call Date
Call Date contains the date the service call was first placed.

Service Technician
Service Technician contains the primary technician assigned to the service call.
Call Type ID

Call Type ID displays the service call type identifier associated with a service call. **Call Type ID** field defaults from **Service Call Entry** (SD.200.00).

Call Status ID

Call Status ID associates the service call status identifier with a service call.

Caller Name

Caller Name displays the contact name of the person calling in the service request.

Completed Date

Completed Date contains the date the service call was completed.

Completed Time

Completed Time contains the time the service call was completed.

Status

Status indicates whether the service call is open or closed. **Status** is managed by the system and does not require user intervention.

Invoice Nbr

Invoice Nbr contains the number of the invoice for this service call.

Invoice Amount

Invoice Amount contains the amount due on this invoice.

Call Details (button)

Call Details accesses detailed information about a specific call.

Invoice (button)

Invoice accesses **Invoice Entry** (SD.202.00). **Invoice** is not available if the company ID associated with the service call does not match that of the company you are currently accessing.

Quick Send Inquiry (button)

Quick Send Inquiry accesses **Quick Send Inquiry** (21.200.00) for viewing the details of Quick Send requests created when the invoice was sent electronically.

Cancel (button)

Cancel prompts you to save your changes and closes the screen.
Service Call Lookup (SD.303.00)

Use Service Call Lookup (SD.303.00) to search for service calls. You can access the screen either from the Inquiries list in Service Dispatch or by clicking Call Lookup on Duplicate Service Call (SD.200.05).

Following are the field descriptions for Service Call Lookup (SD.303.00).

Customer ID

Use Customer ID to specify an identification code assigned to a customer. Use the asterisk (*) to retrieve service call information for all customers. Press F3 to open Customer List and search information for all customers, regardless of their status.

Customer Lookup (icon button)

Click Customer Lookup to open Customer Lookup (SD.305.00), on which you can set up search criteria to find a particular customer. For more information, go to “Customer Lookup (SD.305.00)” on page 371.

Site ID

Use Site ID to designate the identification code assigned to a customer site. Use the asterisk (*) to retrieve service call information for all sites associated with the customer ID you specified in Customer ID. Press F3 to open the Site Maintenance List and search for all sites associated with the customer.
Project ID
Use Project ID to limit the service call information that appears in the grid. Use the asterisk (*) to retrieve service call information for all projects, or press F3 to open Active Projects in Login Company List and select a project.

Call Type ID
Use Call Type ID to specify the identification code assigned to the call type associated with a service call. Use the asterisk (*) in Call type ID to retrieve service call information for all call types. Press F3 in Call type ID to open the Call Type Maintenance PV List and search for call types associated with a customer you specify in Customer ID or all projects if Customer ID contains an asterisk.

Call Status ID
Use Call Status ID to designate the identification code assigned to the status of a service call. Use the asterisk (*) in Call Status ID to retrieve service call information for all call statuses. Press F3 to open the Call Status Maintenance PV List and search for call statuses associated with a customer you specify in Customer ID or all call statuses if Customer ID contains an asterisk.

Promised Date
Use Promised Date to specify a range that includes the planned completion date of the service call. To search by a single date, enter the same beginning and ending date.

Completed Date
Use Completed Date to specify a range of dates during which the service call was finished. To search by a single date, enter the same beginning and ending date.

Primary Tech
Use Primary Tech to select the employee ID of the technician who handled the service call. Use the asterisk (*) to retrieve service calls assigned to all technicians. Press F3 to open the Employee Maintenance PV List and select a specific technician's employee ID.

Invoice Number
Use Invoice Number to designate a service call invoice. Use the asterisk (*) in Invoice Number to retrieve information about all service calls that have been invoiced. Press F3 to open the Service Call Invoice List and search for invoices that are associated with a customer you specify in Customer ID or all service call invoices if Customer ID contains an asterisk.

Service Call Status
Click a Service Call Status option to select service calls based on call status. The options are:
- Open (the default)
- Completed
- Both

Problem Code Status
Click a Problem Code Status option to select service calls based on the status of the associated problem. The options are:
- Open (the default)
- Completed
- Both
Refresh (button)
Click Refresh to initiate the service call search. If you opened Service Call Lookup (SD.303.00) while in Duplicate Service Call (SD.200.05), search results appear in the grid area based on the company you selected in Company ID on Service Call Entry (SD.200.00) and other search criteria you specified in Service Call Lookup (SD.303.00). If you accessed Service Call Lookup (SD.303.00) from the Inquiries list, search results appear in the grid for the company to which you are currently logged on and based on the search criteria you specified.

Select (button)
Click Select to select a service call line on the Calls tab grid. If you accessed Service Call Lookup (SD.303.00) from Duplicate Service Call (SD.200.05), that screen appears again after you click Select, and the ID of the service call you selected appears in Service Call ID. If you accessed Service Call Lookup (SD.303.00) from the Inquiries list, Service Call Entry (SD.200.00) appears, and the service call’s details appear.

Calls Tab
Information on the Calls tab is available for display and selection only. The fields are:

Service Call ID
Service Call ID contains the identification code assigned to the service call.

Company ID
Company ID contains the identification number of the company associated with the service call.

Customer ID
Customer ID contains the identification number of the customer that requested the service call.

Customer Name
Customer Name contains the name of the customer who requested the service call.

Status
Status indicates the current state of the service call.

Telephone Nbr
Telephone Nbr contains the phone number of the site receiving the service.

Project ID
Project ID contains the identifier of a project associated with the service call.

Call Type
Call Type contains the type of service call.

Call Status
Call Status indicates whether the service call is open or completed.

Date Promised
Date Promised contains the planned date of service.

Primary Tech
Primary Tech contains the identification code of the technician assigned to the service call.
Caller Name
Caller Name contains the name of the person who requested the service.

Invoice Number
Invoice Number is the number assigned to the service call invoice.

Invoice Amount
Invoice Amount is the total charges on the service call invoice.

Problems Tab
Information on the Problems tab is available for display and selection only. The fields are:

Service Call ID
Service Call ID contains the identification code assigned to the service call associated with the problem.

Problem ID
Problem ID contains the identification code assigned to the problem the service call addresses.

Problem Name
Problem Name contains a brief description of the problem the service call addresses.

Technician
Technician contains the identification code of the technician assigned to the call.

Status
Status contains the state of the problem the service call addresses.

Start Date
Start Date contains the date service is expected to begin.

Start Time
Start Time contains the time of day service is expected to begin.

Cause ID
Cause ID contains the identification code assigned to the cause of the problem.

Resolution ID
Resolution ID contains the identification code assigned to the solution to the problem.
Customer Lookup (SD.305.00)

Use Customer Lookup (SD.305.00) to search for customers based on site information. For example, a dispatcher selects the Site Name option in Search By, Contains in Using, and types 01 in Search Info to find customer sites with names such as 010 and 98016. Search results appear in the Query Results area.

You can access Customer Lookup (SD.305.00) either from the Inquiries list in Service Dispatch or by clicking Customer Lookup on Service Call Lookup (SD.303.00).

![Customer Lookup (SD.305.00)](image)

Figure 156: Customer Lookup (SD.305.00)

Following are the field descriptions for Customer Lookup (SD.305.00).

**Search By**

Use Search By to select the field on which to base the search. The options are:

- Site Name
- Attention
- Description
- Address 1
- Address 2
- City
- Equipment ID
- Asset ID
- Serial Number
- Model ID
- Address User1
- Address User2
- Postal Code
- Phone
- Address User5
- Address User6
Using

In **Using** you can specify the beginning characters or any characters within the text you enter in **Search Info** to narrow your search. The options are:

- **Begins with** — Type the first few characters of the text.
- **Contains** — Type characters that appear consecutively in the text.

**Search Info**

Use **Search Info** to enter text to complete search criteria.

**Refresh (button)**

Click **Refresh** to initiate the customer search. Search results appear in the Query Results area.

**Select (button)**

Click **Select** to select a customer detail line in the Query Results area. Click the detail line for the appropriate customer, and then click **Select**.

If you opened **Customer Lookup** (SD.305.00) in **Service Call Entry** (SD.200.00), the customer’s information appears on that screen’s **Service Call Info** tab. If you accessed **Customer Lookup** (SD.305.00) from **Service Call Lookup** (SD.303.00), the customer’s identification code appears in **Customer ID** on that screen. If you accessed **Customer Lookup** (SD.305.00) on the Inquiries list, **Site Maintenance** (SD.025.00) opens and information for the site you selected appears.

**Query Results area**

Information in the Query Results area is available for display and selection only. Fields in the Query Results area are:

**Equip ID**

**Equip ID** is visible if Equipment ID, Asset ID, Serial Nbr, or Model ID is selected in **Search By**. It contains the identification code assigned to a piece of equipment associated with a customer site.

**Asset ID**

**Asset ID** is visible if Equipment ID, Asset ID, Serial Nbr, or Model ID is selected in **Search By**. It contains the identification code assigned to a piece of equipment associated with a customer site.

**Serial Nbr**

**Serial Nbr** is visible if Equipment ID, Asset ID, Serial Nbr, or Model ID is selected in **Search By**. It contains the serial number assigned to a piece of equipment associated with a customer site.

**Manufacturer ID**

**Manufacturer ID** is visible if Equipment ID, Asset ID, Serial Nbr, or Model ID is selected in **Search By**. It contains the identification code assigned to the manufacturer of a piece of equipment associated with a customer site.

**Model ID**

**Model ID** is visible if Equipment ID, Asset ID, Serial Nbr, or Model ID is selected in **Search By**. It contains the model number assigned to a piece of equipment associated with a customer site.

**Customer ID**

**Customer ID** contains the customer identification code associated with a customer site.

**Site ID**

**Site ID** contains the customer site’s identification code.
Name
Name contains the name of the customer site.

Description
Description contains brief details about the customer site.

Attention
Attention contains a contact name for the customer site.

Address Line 1
Address Line 1 contains the customer site’s first address line.

Address Line 2
Address Line 2 contains the customer site’s second address line.

City
City contains the name of the city in which the customer site is located.

State
State contains the name of the state in which the customer site is located.

Postal Code
Postal Code contains the postal code for the customer site.

Country/Region
Country/Region contains the name of the country or region in which the customer site is located.

Branch ID
Brand ID contains the identification code assigned to the customer site’s branch.

Phone/Ext
Phone/Ext contains the telephone number for the customer site.

Fax/Ext
Fax/Ext contains the fax telephone number for the customer site.

Geographic Zone
Geographic Zone contains the identification code assigned to the geographic zone in which the customer site is located.

Dwelling Type
Dwelling Type contains the identification code assigned to the type of structure that houses the customer site.
Customer Site Location (SD.905.00)

Integrating with Microsoft MapPoint, Customer Site Location (SD.905.00) will display a map indicating the location of a customer site (shipping address). Access the screen by selecting MapPoint Integration from the Service Dispatch menu or by right-clicking on the task bar on Graphical Dispatch Board (SD.900.00) and selecting Map from the menu.

Following are the field descriptions for Customer Site Location (SD.905.00).

Cust ID

Cust ID is the customer identifier. Type one in or select one from the Customer List. When the identifier is entered, the customer name displays to the right of the field. Click the ellipsis (…) button to the left of Cust ID to access the Customer Maintenance (08.260.00) PV list in the Accounts Receivable module.

Site ID

Site ID selects the physical location address. When the ID is entered, the site name displays to the right of Site ID. Click the ellipsis (…) button to the left of Site ID to access Site Maintenance (SD.025.00).

Refresh (button)

Click Refresh to regenerate the map window.
Maintenance Screens

Maintenance Screens Overview

The Service Dispatch module is a comprehensive service business system that is designed to track and manage every detail of a service organization. Several maintenance screens exist in the system that enables users to completely automate service call processing, dispatching and invoicing efficiently and accurately.

See “Setting up Service Dispatch” on page 46 for detailed procedures explaining how to adapt the Service Dispatch module to your business needs and practices.

Branch Maintenance (SD.001.00)

Branch Maintenance (SD.001.00) allows you to create an unlimited number of user-defined branches. It links a user-specified number of geographic zones to a branch code, thus allowing a branch to be as small or as large as necessary. This screen also creates a branch abbreviation. This abbreviation is added to the beginning of service call IDs, equipment IDs and service contract IDs, if you select this option in Service Series Setup Maintenance (SD.000.00). The identifiers created with abbreviations do not allow each branch to have its own sequential ID numbering schema. However, you can quickly identify a branch with a service contract, piece of equipment, or service call.

This screen also accepts general information regarding the branch, such as the contact, address, phone, and fax number. Notes are also entered for the branch by clicking the Notes/Attachments icon.

Note: A geographic zone and a branch form a one-to-one relationship. Therefore, a geographic zone is only associated with one branch. If a geographic zone exists over two or more branches, do not link the geographic zone to a branch.

![Branch Maintenance (SD.001.00)](image)

Figure 158: Branch Maintenance (SD.001.00)
Following are the field descriptions for Branch Maintenance (SD.001.00).

**Branch ID**
Branch ID creates a user-defined identifier code to identify a branch. The identifier is a 10-character alphanumeric code.

**Branch Abbreviation**
Branch Abbreviation creates a three-character abbreviation for a branch. This abbreviation is added to the beginning of the service call identifiers, equipment IDs, and service contract IDs, if you select this option in Service Series Setup Maintenance (SD.000.00).

**Branch Name**
Branch Name contains the 30-character maximum branch name for a branch identifier.

**Company ID**
Company ID assigns a branch to a company.

**Attention**
Attention contains the name of the branch manager or other contact person at a particular branch.

**Address**
Address contains the address of the branch. It may be two lines of address up to 30 characters each.

**City**
City contains the city where the branch is located. The city name can be a maximum of 30 characters.

**State**
State contains the two-character abbreviation for the state in which the branch is located.

**Zip**
Zip contains the zip code where the particular branch is located.

**Country/Region**
Country/Region contains the country or region where the particular branch is located.

**Phone**
Phone contains the branch’s phone number along with a four-digit extension.

**Fax Number**
Fax Number contains the branch’s fax number along with a four-digit extension.

**Zone Area**

**Geographic Zone ID**
Geographic Zone ID associates a geographic zone with a branch code. A parent-to-child relationship between a branch code and a geographic zone may be created.
Description

Description displays the explanation of the geographic zone.

Note: The Branch/Zone Maintenance PV List filters and lists only those geographic zones that have not been assigned to a branch. This association is made in Geographic Zone Maintenance (SD.009.00).

Note: You can print a listing of the branches. For more information, see “Branch List (SD.600.00)” on page 501.
Call Status Maintenance (SD.002.00)

*Call Status Maintenance* (SD.002.00) displays an unlimited number of call statuses and descriptions used to define the life cycle of a call. These call statuses provide needed information regarding the status of a service call.

Each time the call status of a service call is changed, the system creates an event log and records the date and time the change was made, as well as the user who made the change. A note or a source document can be attached for each line of detail, indicating the reason for the call status change. Open *Service Call Status Log* (SD.027.00) by clicking the ellipsis (...) next to *Call Status* in *Service Call Entry* (SD.200.00), from *Status Log* button in *Dispatch* (SD.201.00), or directly accessing *Service Call Status Log* (SD.027.00).

**Note:** This screen is viewed in either grid view or form view by double-clicking or by pressing F4.

![Call Status Maintenance (SD.002.00)](image)

**Figure 159: Call Status Maintenance (SD.002.00)**

Following are the field descriptions for *Call Status Maintenance* (SD.002.00).

**Call Status ID**

*Call Status ID* accepts an unlimited number of unique identifiers assigned to a service call. These IDs can be a maximum of 10 characters.

**Description**

*Description* contains a 30-character explanation of the service call’s status.

**In Progress**

*In Progress* displays the service calls technicians are actively and/or currently working. *In Progress* is not operable in the current release.

**Note:** You can run a report that lists call statuses and the information associated with them. For more information, see “Call Status List (SD.601.00)” on page 501.
Call Type Maintenance (SD.003.00)

Call Type Maintenance (SD.003.00) accepts an unlimited number of unique call types. It provides the ability to separate service calls or jobs by divisions or lines of business. For example, a call may be classified as an air conditioning call, heating call, plumbing call, or a preventive maintenance call.

In addition, this screen allows you to link a subaccount with a call type. For instance, you may want to have the revenue from the heating division in a separate subaccount from the air conditioning division in the General Ledger. This allows sales revenue to be recognized in a more detailed manner.

Note: This screen is viewed in both grid and form view by double-clicking or by pressing F4.

Figure 160: Call Type Maintenance (SD.003.00)

Following are the field descriptions for Call Type Maintenance (SD.003.00).

Call Type ID
Call Type ID accepts an unlimited number of unique call type identifiers. Call Type IDs allow the creation and separation of the calls by line of business or business centers.

Description
Description contains a 30-character explanation of the service call type.

Use Sub from Site
Use Sub from Site permits the default of the subaccount associated with the sales and costs of the service call to the value entered in Site Maintenance (SD.025.00). If this box is checked and no subaccount information exists at the site level, the subaccount from the call type is used.

SubAccount
SubAccount associates or links a General Ledger subaccount to a call type. A subaccount is selected by double-clicking or by pressing the F3 key that accesses the active subaccount list.

Note: It is recommended that you carefully think through your subaccounts relative to call types. Once service calls have been created, you must update the database to recognize and clean up all call types for various analysis reports if you desire to change subaccounts. In addition, it is recommended that companies with three or more branches consider checking Use Sub from Site.
Default Service Type

Default Service Type provides an optional way of associating a call type to a specific invoice type. This is optional and has no functional impact, but may be used for reporting purposes.

Note: You can run a report of all call types. For more information, see “Call Type List (SD.602.00)” on page 502.
Dispatch - View Maintenance (SD.004.00)

Dispatch - View Maintenance (SD.004.00) sets up an unlimited number of call view templates to display service calls in Dispatch (SD.201.00) in any manner.

Following are the field descriptions for Dispatch - View Maintenance (SD.004.00).

**Call View**

*Call View* allows you to set up an unlimited number of unique template identifiers. These call view IDs are associated with a user (for example, dispatcher) for defaulting the most popular set of records in the service call queue.

**Description**

*Description* contains a 30-character explanation of the service call view.

**Priority**

*Priority* selects the desired priority of service calls to be viewed. To view premium priority service calls only, select the *Premium* check box and clear the *High*, *Medium*, and *Low* check boxes.

**Branch ID**

*Branch ID* displays a list of service calls. Select the *All* check box to access all service calls for a Branch ID. The list is determined by the related branch fields in the *User Configuration* subscreen of Service Series Setup Maintenance (SD.000.00). If only one branch ID is allowed, the branch identifier associated with the service call defaults to *Branch ID* and is display-only.

**All (Branch ID)**

*All (Branch ID)* displays all service calls for all branches. *All (Branch ID)* is restricted to those users who have appropriate access rights. This prevents the dispatching departments of two different branches from dispatching each other’s service calls.

**Technician**

*Technician* displays a selected list of service calls in the service call queue based on a single Technician ID.

**All (Technician)**

*All (Technician)* displays all service calls. It does not filter/restrict calls by any particular service technician.
Call Type (button)

Call Type accesses Call Type (SD.004.05), which provides a tool for restricting the service call queue to view only the service calls with a desired call type.

Call Status (button)

Call Status accesses Call Status (SD.004.06), which provides a tool for restricting the service call queue to view only the service calls with a desired call status.

Geographic (button)

Geographic accesses Geography (SD.004.01), which provides a tool for restricting the service call queue to view only the service calls that reside in the selected geographic zones.

Sort Order (button)

Sort Order accesses Dispatch Sort Order (SD.004.02), which sorts service calls in the service call queue, allowing calls to be viewed in the most desirable manner.

Note: It is recommended that you set up a user with at least one call queue view with no filters.

Geography (SD.004.01)

Geography (SD.004.01) restricts the service call queue to display only the calls that reside in selected geographic zones. Open Geography (SD.004.01 from Dispatch - View Maintenance (SD.004.00) by clicking Geographic.

![Geography (SD.004.01)](image)

Figure 162: Geography (SD.004.01)

Following are the field descriptions for Geography (SD.004.00).

Geographic ID

Geographic ID contains the identification given to a particular region.

Description

Description accepts a 30-character explanation of the geographic zone.

OK (button)

OK closes the screen and saves any changes.
Dispatch Sort Order (SD.004.02)

Dispatch Sort Order (SD.004.02) sorts calls on the service call queue, allowing you to view the calls many different ways. Open Dispatch Sort Order (SD.004.02) from Dispatch - View Maintenance (SD.004.00) by clicking Sort Order.

![Dispatch Sort Order (SD.004.02) screen]

Figure 163: Dispatch Sort Order (SD.004.02)

Following are the field descriptions for Dispatch Service Order (SD.204.02).

Available Fields
Available Fields is a listing of fields available for display.

Sort Fields
Sort Fields displays the fields selected from Available Fields.

Add (button)
Add transfers the highlighted field from Available Fields to Sort Fields.

Remove (button)
Remove transfers the highlighted field from Sort Fields to Available Fields.

Remove All (button)
Remove All transfers all entries from Sort Fields to Available Fields.

Sort Direction
Sort Direction determines whether highlighted fields appear in ascending or descending order.

OK (button)
OK closes the screen and saves any changes.
Call Type (SD.004.05)

Call Type (SD.004.05) restricts the service call queue to display only the calls that have desired call type(s). Open Call Type (SD.004.05) from Dispatch - View Maintenance (SD.004.00) by clicking Call Type.

![Call Type (SD.004.05)](image)

Figure 164: Call Type (SD.004.05)

Following are the field descriptions for Call Type (SD.004.05).

**Call Type**

Call Type is a particular service call type.

**Description**

Description is a 30-character explanation of the call type.

**OK (button)**

OK closes the screen and saves any changes.

Call Status (SD.004.06)

Call Status (SD.004.06) restricts the service call queue to display only the calls that have a desired call status. Open Call Status (SD.004.06) from Dispatch - View Maintenance (SD.004.00) by clicking Call Status.

![Call Status (SD.004.06)](image)

Figure 165: Call Status (SD.004.06)

Following are the field descriptions for Call Status (SD.004.06).

**Call Status**

Call Status is a particular service call status.

**Description**

Description is a 30-character explanation of the call status.

**OK (button)**

OK closes the screen and saves any changes.
Dwelling Maintenance (SD.005.00)

*Dwelling Maintenance* (SD.005.00) accepts an unlimited number of unique dwelling types. *Dwelling Maintenance* (SD.005.00) creates dwelling types by size or square footage and by the type of building (residential, single, or multiple family dwelling) on the particular site. This information is useful for reporting purposes, such as marketing pieces created for a specific dwelling type. For example, the marketing department might want to send a promotional piece to all single-family homes with pools.

![Dwelling Maintenance (SD.005.00)](image.png)

*Figure 166: Dwelling Maintenance (SD.005.00)*

Following are the field descriptions for *Dwelling Maintenance* (SD.005.00).

**Dwelling ID**

Dwelling ID contains the unique dwelling identifier for each dwelling type in the database. The dwelling ID is a default value from *Site Maintenance* (SD.025.00), which is associated with a service call record.

**Description**

Description accepts a 30-character explanation of Dwelling ID.

**Note:** You can run a report of all dwelling types. For more information, see “Dwelling List (SD.603.00)” on page 503.
**Employee Class Maintenance (SD.006.00)**

*Employee Class Maintenance (SD.006.00)* creates an unlimited number of unique employee classes. Each employee entered into the system using *Employee Maintenance (SD.007.00)* is assigned to one of these user-defined classes. An employee is only assigned to one class. A description of the employee class is also typed into this screen, along with information regarding eligibility for commission.

**Note:** This screen is viewed in either form or grid view by double-clicking or pressing F4.

![Employee Class Maintenance (SD.006.00)](image)

*Figure 167: Employee Class Maintenance (SD.006.00)*

Following are the field descriptions for *Employee Class Maintenance (SD.006.00)*.

**Employee Class ID**

*Employee Class ID* contains the employee class using a unique user-defined identifying code. Each identifier can be 10 characters in length. An unlimited number of user-defined classes can be entered into the system.

**Description**

*Description* accepts a 30-character explanation of the employee class identifier.

**Commission Paid**

*Commission Paid* may be used for reporting purposes. There is no system functionality.

**Note:** You can run a report that shows all employee classes with their descriptions and commissions paid indicator. For more information, see “Employee Class List (SD.605.00)” on page 503.
Employee Maintenance (SD.007.00)

Employee Maintenance (SD.007.00) adds and maintains employee information. Employee ID assigns a unique ID to each employee. The General Information frame includes basic information needed for each employee, such as address, social security number, date of birth, supervisor, home phone, and pager number.

Clicking Personal Info accesses Employee Personal Information (SD.007.01), which contains information regarding the employee’s pay, driver’s license information, and other general office information. The system administrator may choose to deny employees the right to view this screen because of its sensitive content. Denying access to selected screens is done via Customization Manager, which allows you to make the Personal Info button invisible for specific users, thus preventing access.

Note: You can run a report that shows the general and personal information for employees. For more information, see “Employee Information (SD.604.00)” on page 504.

Skills accesses Employee Skills Information (SD.007.03), which associates an employee with needed skills. It also rates each employee on the associated skills.

Licenses accesses Employee License Information (SD.007.04), which associates an employee with the necessary licenses needed by a technician or other employee.

Tool accesses Employee Tool (SD.007.05), which manages company-owned tools loaned to employees. Select tools from the Tool Maintenance PV List to be assigned to an employee. You also have the ability to remove previously selected tools from an employee.

Figure 168: Employee Maintenance (SD.007.00) -- Service Dispatch is not integrated with the Payroll module
Employee Maintenance (SD.007.00)

Following are the field descriptions for Employee Maintenance (SD.007.00).

**Employee ID**
Employee ID assigns a unique identification code to each employee. Employee ID allows you to input and distinguish between two employees that may have the same or similar names.

**Payroll ID**
Payroll ID associates a Service Dispatch employee to a Payroll employee when Service Dispatch is integrated with the Payroll module. Enter the Employee ID from Payroll Employee Maintenance (02.250.00) in Payroll ID. Payroll ID must be populated to allow you to copy employee information when using the Copy Info button.

**Copy Info (button)**
Click the Copy Info button to copy employee information from the Payroll module to Employee Maintenance (SD.007.00) when Service Dispatch is integrated with the Payroll module.

**First Name**
First Name contains the first name of the person associated with Employee ID.

**M.I.**
M.I. contains the middle initial of the person associated with Employee ID.

**Last Name**
Last Name contains the last name of the person associated with Employee ID. The drop-down list to the right of Last Name indicates whether the employee is currently on the payroll.
Status

Status designates an employee as active or inactive. In addition, you can identify when an employee is on vacation, out sick, or on personal time off. Only active employees can be assigned to service calls.

Note: When the status of an employee is set to vacation, sick or personal, a task bar will be displayed across all dates on the Graphical Dispatch Board (SD.900.00) for the employee. If the status is set to inactive, the employee will not appear on the Graphical Dispatch Board (SD.900.00).

Hint: Employee Schedule (SD.904.00) provides an alternative means of setting an employee's status. A benefit to using Employee Schedule (SD.904.00) instead of Employee Maintenance (SD.007.00) is that you can indicate specific days the status should apply to.

Address Line 1

Address Line 1 accepts the home address for the employee. There are two lines of 30 characters each for the address.

City

City contains the municipality in which the employee resides.

State

State contains the two or three character state abbreviation for the employee. This is a validated field; therefore, only values entered in State/Province Maintenance (21.290.00) in the Shared Information module are entered.

Zip Code

Zip Code contains the zip code for the employee.

Social Security No.

Social Security No. contains the social security number of the employee.

Date of Birth

Date of Birth contains the birth date of the employee.

Employee Class

Employee Class associates the employee with a user-specified employee class.

Branch ID

Branch ID associates the employee with a specific branch. Although this field is not required, you should enter a Branch ID if Field Service Management will be integrated with either Payroll or Advanced Payroll. The Branch ID used should be associated with the same company the employee is associated with in Employee Maintenance (02.250.00).

Home Phone No.

Home Phone No. contains the home phone number of the employee.

Pager No./PIN

Pager No./PIN contains the pager number or PIN number of the employee. This number will be used by the paging program to send pages to the employee.

E-mail Address

E-mail Address contains the email address of the employee. This address will be used in Graphical Dispatch Board (SD.900.00) when an email message is sent to the employee.
Default Inventory Site
Default Inventory Site contains the valid inventory site (for example, truck) associated with the employee. If the employee is the primary technician on a service call, this inventory site will be the default value during invoice entry. Entering a valid inventory site identifier streamlines invoice processing.

Template Id
Template Id associates a pager template with the employee. When an employee or technician is assigned to a call, the appropriate fields are populated and included in the alphanumeric page. Pager template default fields are set up in Service Series Setup Maintenance (SD.000.00).

Supervisor
Supervisor associates an employee with a supervisor. The supervisor’s name displays to the right of Supervisor. Use Supervisor to group employees on reports.

Company ID
Company ID defaults to the company assigned to the branch ID.

Other Phone (button)
Other Phone accesses Employee Other Phone (SD.007.02) which accepts additional phone numbers to use when trying to contact an employee.

Personal Info (button)
Personal Info accesses Employee Personal Information (SD.007.01) which associates additional information about this employee; such as, the driver’s license and pay information.

Skills (button)
Skills accesses Employee Skills Information (SD.007.03), which associates an employee with possible required skills for a service call. Using this feature incorporates messaging behavior when assigning an employee to a service call.

Licenses (button)
Licenses accesses Employee License Information (SD.007.04), which associates an employee with possible licensing requirements for a service call. Using this feature incorporates messaging behavior when assigning an employee to a service call.

Tool (button)
Tool accesses Employee Tool (SD.007.05), which allows management of company-owned tools loaned to employees.

Geo Zones (button)
Geo Zones accesses Employees - Geographic Zones (SD.039.00) where the employee can be assigned to geographic zones.
**Employee Personal Information (SD.007.01)**

*Employee Personal Information* (SD.007.01) allows you to enter the following types of information:

- **Office Information**: Office phone extension, worker’s compensation department, gender, marital status, and exemptions.
- **Driver’s License/Vehicle**: Driver’s license number, expiration date, issuing state, and assigned vehicle.
- **Pay/Quota Information**: Pay type, department, pay rate, date hired, date of last raise, date terminated, commission plan, and sales quota.

Access to this information can be controlled by making the button used to access this screen invisible. This can be accomplished with Customization Manager.

![Employee Personal Information (SD.007.01)](image)

Figure 170: Employee Personal Information (SD.007.01)

Following are the field descriptions for *Employee Personal Information* (SD.007.01).

**Office Phone Ext.**

*Office Phone Ext.* is an office extension for reference.

**Worker’s Comp. Dept.**

*Worker’s Comp. Dept.* contains the Worker’s Compensation department to which the employee is assigned.

**Sex**

*Sex* selects Male or Female from a drop-down list.

**Marital Status**

*Marital Status* selects Married or Single from a drop-down list.

**Exemptions**

*Exemptions* contains the number of exemptions claimed by the employee.

**Payroll ID**

*Payroll ID* is only visible if *Payroll Interface* in *Service Series Setup Maintenance* (SD.000.00) is set to Payroll or Advanced Payroll. *Payroll ID* allows linking employee ID in Field Service Management to the employee identifier defined in the Payroll module.
Send Time To
If Payroll Interface in Service Series Setup Maintenance (SD.000.00) is set to Advanced Payroll, Send Time To indicates whether labor time is sent to Payroll or Advanced Payroll.

Driver’s License No.
Driver’s License No. contains the driver’s license number of the employee.

Expiration Date
Expiration Date contains the date the driver’s license expires.

Issuing State
Issuing State contains the state or province that issued the driver’s license to the employee.

Assigned Vehicle ID
Assigned Vehicle ID displays the vehicle identifier associated with the employee. Vehicles are set up in the system using Vehicle Maintenance (SD.020.00).

Pay Type
Pay Type designates the pay type associated with an employee. A designation of hourly enables the system to calculate costs based on the employee’s hourly labor rate. If a salaried employee will be dispatched on service calls and you wish to capture labor cost on the service call for the salaried employee, you should set the employee up as hourly. This has no effect on how the employee is set up in the Payroll module.

Earnings Type
Earnings Type contains a unique identifying code that distinguishes the earnings type from all other earnings types in the database. An earnings type ID is any alphanumeric code you assign (for example, REG for regular or OT for overtime). Earnings types are set up in Earnings Type Maintenance (02.270.00) or in Earnings Type Maintenance (SD.022.00) if Payroll is not installed.

Note: Earnings types are important because they are associated with an “earnings multiplier”. Labor cost on a service call is computed with the following formula: Work Hours * Pay Rate * Earnings Multiplier = Labor Cost. By setting up different earnings types with different earnings multipliers you can control the labor cost calculation.

Example: Two earnings types are created, “REG” with an earnings multiplier of “1.0” and “OT15” with an earnings multiplier of “1.5”. A technician paid $20.00/hr works one hour of regular time. The time would be entered with the REG earnings type:

\[ 1.0 \text{ hour} \times \$20.00/\text{hr} \times 1.0 = \$20.00 \text{ Labor cost} \]

A technician paid $20.00/hr works one hour of evening time when the technician’s pay is 1 ½ the regular pay rate. The time would be entered with the OT15 earnings type:

\[ 1.0 \text{ hour} \times \$20.00/\text{hr} \times 1.5 = \$30.00 \text{ Labor cost} \]

Work Location
Work Location contains a unique identifying code that distinguishes the work location from all other work locations in the database. A work location is any alphanumeric code assigned (for example, a city abbreviation, a warehouse name, etc.). Work locations are set up in Work Location Maintenance (02.280.00) or in Work Location Maintenance (SD.023.00) if Payroll is not installed.

Department
Department contains the department to which the employee is assigned.
Pay Rate
Pay Rate is a user-specified hourly rate. The amount or value entered in Pay Rate is used during invoice entry as the default for unit cost.

Note: Many organizations want to use a burdened rate for labor costing as opposed to the straight hourly pay rate. The rate entered here is used strictly for labor costing on a service call and does not impact the actual pay rate of an employee, so this rate can be a burdened rate.

Date Hired
Date Hired contains the date the employee was hired.

Date of Last Raise
Date of Last Raise contains the date of the employee’s last raise.

Date Terminated
Date Terminated is disabled unless the employee is an inactive employee.

Commission Plan ID
Commission Plan ID is not operable in the current release.

Sales Quota
Sales Quota contains the forecasted expected sales volume for the employee.

OK (button)
OK closes the screen and saves any changes.

Employee Other Phone (SD.007.02)
Employee Other Phone (SD.007.02) provides a screen where you can list any telephone numbers associated with the employee. These may be emergency contact numbers or any other number you may want to keep a record of that relates to the employee.

Description
Description is a free-form text field where a brief description or label for the telephone number can be entered.

Phone Number
Phone Number is a telephone number formatted field where a contact telephone number is entered.
Employee Skills Information (SD.007.03)

Employee Skills Information (SD.007.03) associates an employee with skills possibly needed for a service call. If a technician is assigned as the primary technician on a service call and a problem code requires a skill that is not listed here for the technician, a message will display during service call entry informing the user that the technician does not have the required skill(s).

![Employee Skills Information (SD.007.03)](image)

Following are the field descriptions for Employee Skills Information (SD.007.03).

**Skill ID**
Skill ID contains the skill identifier assigned to an employee.

**Description**
Description displays an explanation of the skill identifier.

**Rating**
Rating allows an evaluation of the employee’s proficiency in this skill.

**OK (button)**
OK closes the screen and saves any changes.
Employee License Information (SD.007.04)

Employee License Information (SD.007.04) associates an employee with possible licensing requirements for a service call. If a technician is assigned as the Primary Technician on a service call and a problem code requires a license that is not listed here for the technician, a message will display during service call entry informing the user that the technician does not have the required license(s).

Following are the field descriptions for Employee License Information (SD.007.04).

**License ID**
License ID contains the license identifier for an employee’s license.

**Active**
Active displays whether the license is active.

**Description**
Description displays an explanation of License ID.

**Effective Date**
Effective Date contains the date when the license becomes effective.

**Expiration Date**
Expiration Date contains the expiration date of the license.

**Certificate Sent**
Certificate Sent is a Yes/No field that defaults to Certificate Required in License Maintenance (SD.010.00).

**OK (button)**
OK closes the screen and saves any changes.
Employee Tool (SD.007.05)

Employee Tool (SD.007.05) manages company-owned tools loaned to employees. If a technician is assigned as the primary technician on a service call and a problem code requires a particular tool usage, the system will check to determine if any of the tools issued to the primary technician are in the tool usage category required. If not, a message will display during service call entry informing the user that the technician does not have the required tool(s).

![Employee Tool (SD.007.05)](image)

**Figure 174: Employee Tool (SD.007.05)**

Following are the field descriptions for Employee Tool (SD.007.05).

**Add Tool - Tool ID**

Add Tool - Tool ID contains the identifier for the tool loaned to the employee. A list of available tools will be displayed in a PV list. Clicking Add issues the tool to the employee by adding the tool to the grid in the Tool frame.

**Add (button)**

Add displays the tool in the Tool frame.

**Return to Warehouse - Tool ID**

Return to Warehouse - Tool ID is activated by highlighting a tool ID in the Tool frame. The tool is displayed in Return to Warehouse - Tool ID.

**Warehouse**

Warehouse contains the warehouse (inventory location) where this tool is being returned. Clicking Return removes this tool from the employee tool list.

**Return (button)**

Return removes this tool from the employee tool list.

**OK (button)**

OK closes the screen and saves any changes.
Problem Code Maintenance (SD.008.00)

*Problem Code Maintenance* (SD.008.00) defines an unlimited number of unique problem or fault codes. The estimated time needed to repair a problem code is also entered.

**Note:** You can run a report of the existing problem codes and their associated information. For more information see “Problem Code List (SD.634.00)” on page 509.

Another feature of *Problem Code Maintenance* (SD.008.00) is the **Prompt Operator** check box. If this check box is selected, the notes that are entered appear when a customer service representative attaches the problem code ID to a service call. This feature allows you to give your customers superior service by asking the appropriate questions to obtain the information necessary to complete a call without spending large amounts of money and time in training.

In addition, the buttons on this screen give access to six subscreens that attaches:

- Possible Tasks/Prices: Interacts with the Flat Rate Pricing module to assign flat rate prices to problem codes. This allows a customer service representative to quote the price of the repair over the phone.
- Problem Code Call Type: Attaches call types to problem codes. The *Problem Code Maintenance PV List* is filtered based on the call types. Therefore, if a service call's call type is A/C and you attach a problem code to the call when accessing the PV list, only the problem codes associated with the A/C call type are displayed.
- Problem Code Tool Usage: Attaches needed tool usage groups to a specific problem code.
- Problem Code Skills: Attaches the skills needed for a problem code. This enables you to dispatch the technicians with the skills necessary to repair a particular problem. If a technician is assigned to a call without the proper skills, the system warns you.
- Problem Code Licenses: Attaches the licenses required for a specific problem code. If a technician without the proper license(s) is assigned to a call, the system warns you.

**Note:** We recommend that you enter at least one problem code for each call type.

![Problem Code Maintenance (SD.008.00)](image.png)

**Figure 175:** Problem Code Maintenance (SD.008.00)

Following are the field descriptions for *Problem Code Maintenance* (SD.008.00).

**Problem Code**

*Problem Code* allows the creation of an unlimited number of user-defined problem codes. Problem codes provide the technician with information regarding the “nature of the problem” in a rapid manner.
Description
Description is a 30-character explanation of the service call problem code.

Estimated Time Duration
Estimated Time Duration allows the estimation of the approximate time required to complete a repair. This assists CSRs and the dispatching department in the dispatching process by estimating the time needed to complete a service. In addition, this time is used to calculate the total duration of the service call.

Prompt Operator
Prompt Operator, if enabled, displays useful notes to the dispatcher or CSR when a problem code is selected at the time a service call is entered. This assists CSRs in collecting the needed information from the customers and provides them with relevant information to ask when processing the service call.

Notes
Notes is a free-form field which allows the entry of prompts for the customer service representative to ask the customer.

Tasks/Prices (button)
Click Tasks/Prices to open Possible Tasks/Prices (SD.008.01) and link flat rate IDs to a problem code. Using this option enables the customer service representative to gain easy access to prices for work performed on a flat rate basis. For more information, see “Possible Tasks/Prices (SD.008.01)” on page 399.

Call Type (button)
(Recommended) Click Call Type to open Problem Code - Call Type (SD.030.00) and link call types to problem codes. Adding call types to the problem codes filters the list of possible values to select when entering problem codes in a service call. For more information, see “Problem Code - Call Type (SD.030.00)” on page 400.

Tool Usage (button)
Click Tool Usage to open Problem Code Tool Usage (SD.008.05) and link tool usage groups to a problem code. Using this option enables the customer service representative to gain easy access to recommended tool groups for performing a particular service. For more information, see “Problem Code Tool Usage (SD.008.05)” on page 401.

Skills (button)
Click Skills to open Problem Code Skills Information (SD.008.02) and link skills to problem codes. Adding skills to problem codes incorporates new behavior in Service Call Entry (SD.200.00) by using warning messages to inform the CSR that a technician may not have the skills required to perform the service. For more information, see “Problem Code Skills Information (SD.008.02)” on page 399.

Licenses (button)
Click Licenses to open Problem Code Licenses Information (SD.008.03) and link license requirements to problem codes. Adding licenses to problem codes incorporates new behavior in Service Call Entry (SD.200.00) by using warning messages to inform the CSR a technician may not have the licenses required to perform the service. For more information, see “Problem Code Licenses Information (SD.008.03)” on page 400.
Possible Tasks/Prices (SD.008.01)

If Flat Rate Pricing is installed, Possible Tasks/Prices (SD.008.01) appears when you click the Tasks/Prices button in Problem Code Maintenance (SD.008.00).

![Figure 176: Possible Tasks/Prices (SD.008.01)]

**Flat Rate ID**

Identifier associated with a flat rate price. Type the ID. If you do not know the flat rate ID, press F3 in the Flat Rate ID box or double-click the right mouse button. A list of all flat rate IDs set up in Flat Rate Entry (SP.000.00) appears. Select an ID and click OK, or double-click the ID.

**Description**

Description is based on the flat rate ID you entered.

**Price**

Price is the flat rate price that is associated with the ID you entered.

Problem Code Skills Information (SD.008.02)

Problem Code Skills Information (SD.008.02) appears if you click the Skills button in Problem Code Maintenance (SD.008.00). Use this screen to associate the problem code with skills that are needed to resolve the problem. Add skills to problem codes to receive warning messages while working in Service Call Entry (SD.200.00) if a technician does not have the skills required to perform the service.

![Figure 177: Problem Code Skills Information (SD.008.02)]

**Skill ID**

Skill ID contains the identification code assigned in Skills Maintenance (SD.017.00) to an expertise needed by a technician when solving a particular problem. Press F3 or double-click the right mouse button to open a list of all skill IDs. Select a skill ID from the list.

Click Edit or Insert on the Skills Maintenance PV List to open Skills Maintenance (SD.017.00) and modify or add a skill ID.

**Description**

Description is an explanation of the skill ID.
Problem Code Licenses Information (SD.008.03)

Click **Licenses** to open **Problem Code Licenses Information** (SD.008.03) and link license requirements to problem codes. Add license information to problem codes to receive warning messages while working in **Service Call Entry** (SD.200.00) if a technician does not have the licenses required to perform a service.

![Figure 178: Problem Code Licenses Information (SD.008.03)](image)

License ID

**License ID** contains the identification code assigned in **License Maintenance** (SD.010.00) to a license needed by a technician when solving a particular problem. Press F3 or double-click the right mouse button to open a list of all license IDs. Select a license ID from the list.

Click **Edit** or **Insert** on the **Employee License Maintenance PV List** to open **License Maintenance** (SD.010.00) and modify or add a license ID.

Description

**Description** is an explanation of the license ID.

Problem Code - Call Type (SD.030.00)

**Problem Code - Call Type** (SD.030.00) appears if you click the **Call Type** button in **Problem Code Maintenance** (SD.008.00).

![Figure 179: Problem Code – Call Type (SD.030.00)](image)

**Problem Code**

**Problem Code** displays the identification code of the problem code you select in **Problem Code Maintenance** (SD.008.00).

**Description**

**Description** displays the brief explanation of the problem code you enter in **Problem Code Maintenance** (SD.008.00).
Call Type ID
In Call Type ID you can designate the identification code of a call type you want to link to the problem code. Press F3 or double-click the right mouse button. A list of all call type IDs set up in Call Type Maintenance (SD.003.00) appears. Select a call type ID from the list.

Click Edit or Insert on the Call Type Maintenance PV List to open Call Type Maintenance (SD.003.00) and modify or add a call type ID.

Description
Description displays a brief explanation of the call type you select in Call Type ID.

Problem Code Tool Usage (SD.008.05)
Problem Code Tool Usage (SD.008.05) appears when you click on the Tool Usage button in Problem Code Maintenance (SD.008.00). In this screen, you can assign all the tools that are needed by the technician to fix the specific problem.

Usage ID
Identifier assigned to a particular tool. Type the ID. If you do not know the usage ID, press F3 in the Usage ID box, or double-click the right mouse button. A list of all tool usage IDs set up in Tool Usage Maintenance (SD.019.00) appears. Select an ID and click OK, or double-click the ID.

Description
Description is associated with the usage ID you entered.
**Geographic Zone Maintenance (SD.009.00)**

*Geographic Zone Maintenance* (SD.009.00) creates an unlimited number of work zones or regions. This assists the dispatching department in assigning proper technicians in the most efficient manner. It also provides management with the ability to collect sales and other reporting information by region. These geographic zones are user-defined areas and can be as broad or specific as needed. This allows the dispatcher to decrease the travel time of the service technicians and, more importantly, cut the waiting time for the customer. Geographic zones can be attached, or linked, to a branch code forming a one-to-one relationship. Geographic zones may also be linked to one or more zip codes. To view a list of geographic zone IDs, use “Geographic Zone List (SD.606.00)” on page 506.

![Figure 181: Geographic Zone Maintenance (SD.009.00)](image)

Following are the field descriptions for *Geographic Zone Maintenance* (SD.009.00).

**Geographic Zone ID**

*Geographic Zone ID* allows the creation of an unlimited number of user-defined geographic zones. Zones are created by grouping zip codes together to form a single zone.

**Description**

*Description* is a 30-character explanation of the geographic zone.

**Technician Assigned**

*Technician Assigned* is an optional field that allows you to indicate the technician ID primarily responsible for the geographic zone. This field does not default into the technician field anywhere else within the system.

**Number of Calls**

*Number of Calls* is the number of service calls in a specific geographic zone that are complete. *Number of Calls* is not operable in the current release.
Total Revenue

Total Revenue is the total revenue generated from a geographic zone. Revenues are calculated when the area revenue process is run. This information generates useful operational reports for management. Total Revenue is not operable in the current release.

Avg Revenue/Call

Avg Revenue/Call is the average revenue generated from all the service calls in a specific zone. This allows the dispatching department to assign service calls to areas where the average revenue per service call is the highest. Avg Revenue/Call is not operable in the current release.

Branch ID

Branch ID associates a branch code with a geographic zone. This creates a one-to-one relationship between a geographic zone and branch code identifier. If more zones are serviced by one branch, we recommend leaving Branch ID blank.

Zip Codes Included Area

Zip Code

Zip Code defines the zip codes in a geographic zone. Access Possible Zip Code Assign to Zone PV List and click Insert to add a zip code on the fly. This accesses Zip Code Maintenance (SD.021.00), where a zip code can be added. Zip codes are optional. A geographic zone can be set up without referencing a zip code.

Description

Description is a free-form area for a description of the zone.

Employees (button)

Employees opens Geographic Zone - Employee Maintenance (SD.038.00), which allows you to review and/or change the employees assigned to the geographic zone.
License Maintenance (SD.010.00)

License Maintenance (SD.010.00) accepts an unlimited number of licenses in the database. Both employee and business licenses may be created. If the Employee type is selected, the business license frame is disabled. This screen also accepts the issuing agency responsible for a particular license, the cost of the initial license, the initial term, and renewal information.

Note: You can run a report that lists all employee and business licenses and their associated information. For more information, see “License List (SD.607.00)” on page 507.

Licenses created in License Maintenance (SD.010.00) may be linked to problem codes, employees, and zip codes.

When a problem code is entered on Service Call Entry (SD.200.00), a check will be made to determine if the primary technician on the service call has the requisite licenses and skills. If not, a warning message will appear. This check is only made on Service Call Entry (SD.200.00) and only for the primary technician on the service call.

Following are the field descriptions for License Maintenance (SD.010.00).

License ID

License ID accepts an unlimited number of licenses in the database by assigning a unique ID to a license.

Description

Description accepts a 30-character explanation of License ID.

License Type

The type of license being entered: Employee or Business. The Employee type of license is used for licenses that must be obtained by employees; many employees within a company may require the same license. The Business type of license applies to the business as a whole; only one of these licenses is required by an organization.
Effective Date

Effective Date is used for business licenses only. If License Type is Business, type the date the license becomes valid.

Expiration Date

Expiration Date is used for business licenses only. If License Type is Business, type in the date the license becomes invalid or the expiration date.

Active

Active compares the system date to the effective/expiration dates; the system determines whether the license is active based on this comparison and will check or uncheck the box accordingly.

Issuing Agency

Issuing Agency allows the selection of the agency that provides the needed licenses. This agency must be an active vendor in Accounts Payable. When entered, the vendor name displays to the right of Issuing Agency.

Agency Description

Agency Description accepts agency information when the agency is not on the vendor list.

Certificate Required

Certificate Required allows the selection of whether a certificate is required for this particular type of license. For example, a City Business Tax license/permit may require that a worker’s compensation certificate be presented before the license is issued. This is for reference purposes only.

Initial Amount

Initial Amount is used to enter the initial cost of the license.

Initial Term

Initial Term is used to enter the length of time that the initial license is valid. A drop-down list allows you to choose Days, Months, or Years.

Renewal Amount

Renewal Amount contains the cost for renewing the license.

Renewal Term

Renewal Term contains the length of time for a renewal of a license. A drop-down list allows you to choose Days, Months, or Years.
License - ZIP Code Maintenance (SD.011.00)

License - ZIP Code Maintenance (SD.011.00) associates zip codes with licenses so the system can issue a warning message if the company no longer has a valid or active license within a specific zip code. You can run a report that shows licenses, by zip code. For more information, see “License - Zip Code List (SD.608.00)” on page 507 and “Zip Code List (SD.618.00)” on page 538.

Following are the field descriptions for License - ZIP Code Maintenance (SD.011.00).

**License ID**

*License ID* associates a license with a problem code, employee, and zip codes.

**License ID (Description)**

*License ID (Description)* accepts a three-character explanation of *License ID*.

**License Type**

*License Type* contains the description of the license identifier.

**City**

*City* indicates the location where the license is valid.

**County**

*County* indicates the county where the license is valid.

**State**

*State* indicates the two-character abbreviation for the state in which the license is valid.

**ZIP Description**

*ZIP Description* contains an explanation of the valid zip code for this license.

**Add (button)**

*Add* transfers the highlighted field from the left side to the right.
Add All (button)
Add All transfers all entries from the left side to the right.

Remove (button)
Remove transfers the highlighted field from the right side to the left.

Remove All (button)
Remove All transfers all entries from the right side to the left.
Media Buy Maintenance (SD.012.00)

*Media Buy Maintenance* (SD.012.00) tracks the marketing resources and referrals for a company. When a service call is entered, the customer service representative selects one of the media IDs from the system, linking the service call to a media code or a specific referral. A media ID is also linked directly to a site, allowing the media ID or resource to default automatically to the service call. The defaulted value can be overridden.

**Note:** To view the revenue and the number of calls associated with a media code, run the *Advertising Media Performance Report* (SD.630.00) report. For more information, see “Advertising Media Performance Report (SD.630.00)” on page 499. You can also run a report that lists the media codes and their associated information. For more information, see “Media Group List (SD.609.00)” on page 508.

For each marketing resource used, a media code can be created. *Media Buy Maintenance* (SD.012.00) links a media code to a media group, which allows you to group similar media codes into a broad media group. You can also enter a budget for a specific media code, a frequency which refers to the budget figure, the location/area which this marketing resource is penetrating, the date the marketing resource was purchased, and the number of penetration pieces being released along with the needed Coop information.

**Note:** Media code can track referrals from other customers. While this is not “media,” it is a good way to track how a call was received.

Following are the field descriptions for *Media Buy Maintenance* (SD.012.00).

**Media Code**

*Media Code* contains the identifier given to a type of marketing resource.

**Description**

*Description* is a 30-character explanation of the resource.

**Media Group**

*Media Group* is general type of resource.

**Budget**

*Budget* contains the amount of money allocated to the particular resource.
Frequency
Frequency contains the number of times the resource is used.

Location
Location contains the physical location of the resource.

Insertion/Buy Date
Insertion/Buy Date contains the deadline for the resource.

Penetration Pieces
Penetration Pieces contains the number of collaterals in use by the resource.

Coop Advertising
Coop Advertising is selected when cooperative resource partners are involved.

Coop Information (button)
Coop Information accesses Coop Advertising Information (SD.012.01).

Coop Advertising Information (SD.012.01)
Coop Advertising Information (SD.012.01) defines the cooperative advertising partners and their share percentage. A check box indicates whether the coop company has paid their portion of a specific media piece. Access Coop Advertising Information (SD.012.01) by clicking the Coop Information in Media Buy Maintenance (SD.012.00).

Select a valid vendor from the Accounts Payable module. The address and phone information may be edited.

Note: If you wish to permanently change vendor information, access Vendor Maintenance (03.270.00) in Accounts Payable.

![Coop Advertising Information (SD.012.01)](image)

Figure 185: Coop Advertising Information (SD.012.01)

Following are the field descriptions for Coop Advertising Information (SD.012.01).

Coop/Vendor ID
Coop/Vendor ID contains the unique identifier given to the vendor or coop.

Name
Name contains the legal name of the vendor or coop.

Address Line 1
Address Line 1 accepts the first line containing the street number and name of the vendor or coop.
Address Line 2
Address Line 2 accepts the second line containing the street number and name of the vendor or coop.

City
City contains the city where the vendor or coop is located. The city name can be a maximum of 30 characters.

State
State contains the two-character abbreviation for the state in which the vendor or coop is located.

Zip Code
Zip Code contains the zip code for the vendor or coop.

Contact
Contact contains the name of the primary contact for the vendor or coop.

Phone Number
Phone Number contains the phone number for the contact person.

Fax Number
Fax Number contains the fax number for the contact person.

Share Percentage
Share Percentage contains the percentage amount cooperative partners contribute to marketing resources.

Coop Portion Paid
Coop Portion Paid is selected when the cooperative advertising partner is current with their portion of the media resource.

OK (button)
OK closes the screen and saves any changes.
Media Group Maintenance (SD.013.00)

*Media Group Maintenance* (SD.013.00) defines a broad media group or category. For example, all the *Media Codes* that are Yellow Pages advertisements may belong to a media group of YELPGS. This provides management with the proper tools to view useful reports regarding the most effective means of advertising.

![Image of Media Group Maintenance (SD.013.00)](image)

*Figure 186: Media Group Maintenance (SD.013.00)*

Following are the field descriptions for *Media Group Maintenance* (SD.013.00).

**Media Group ID**

*Media Group ID* contains the identification for a broad media group.

**Description**

*Description* accepts the 30-character explanation of the media group.

**Note:** You can run a report that lists the media groups and their descriptions. For more information, see “Media Group List (SD.609.00)” on page 508.
Cause Code Maintenance (SD.014.00)

*Cause Code Maintenance* (SD.014.00) creates a cause ID defining what made a piece of equipment fail. For example, the cause code may be Thermostat Inoperative for the problem code A/C Blowing Warm Air.

![Figure 187: Cause Code Maintenance (SD.014.00)](image)

Following are the field descriptions for *Cause Code Maintenance* (SD.014.00).

**Cause ID**

*Cause ID* contains the root cause of the problem.

**Description**

*Description* indicates the 30-character explanation of the cause.
Resolution Code Maintenance (SD.015.00)

Resolution Code Maintenance (SD.015.00) creates a resolution code defining what a technician did to solve a problem. For example, the resolution code may be Replaced Thermostat for the cause code Thermostat Inoperative.

![Resolution Code Maintenance (SD.015.00)](image)

*Figure 188: Resolution Code Maintenance (SD.015.00)*

Following are the field descriptions for Resolution Code Maintenance (SD.015.00).

**Resolution ID**

*Resolution ID* contains the resolution of the problem.

**Description**

*Description* accepts a 30-character explanation of the resolution.
Product Class Maintenance (SD.016.00)

*Product Class Maintenance* (SD.016.00) adds Field Service Management related information to the product class data created in the Inventory module.

**Note:** You can run reports that list all of the product classes and just the extended Field Service Management product class data. See Inventory’s *Product Classes* (10.700.00) and “Product Class List (SD.611.00)” on page 509, respectively, for more information.

![Figure 189: Product Class Maintenance (SD.016.00)](image)

Following are the field descriptions for *Product Class Maintenance* (SD.016.00).

**Class ID**

*Class ID* is a unique identifying code that distinguishes the product class from all other product classes in the database. New product classes must be defined in the Inventory module.

**Description**

*Description* displays a 30-character explanation of *Class ID*.

**Comm Status**

*Comm Status* manages the grouping of inventory items with respect to the type of commission being paid when generating the commission report. *Comm Status* is not operable in the current release.

**Pricing Type**

*Pricing Type* manages the grouping of inventory items with respect to the type of mark-up pricing to be calculated when entering detail lines in the *Invoice - T & M Details* (SD.203.00) of *Invoice Entry* (SD.202.00). A class ID is associated with a detail line item record in the *Invoice - T & M Details* (SD.203.00). Therefore, the relationship between the pricing type and class ID controls which mark-up ID to use.

**Sales Analysis Category**

*Sales Analysis Category* manages the grouping of inventory items when generating the *Sales Analysis Report*. For more information, see “Sales Analysis Report (SD.626.00)” on page 512.

**Flat Rate Markup ID**

(Optional use with Flat Rate Pricing module) *Flat Rate Markup ID* manages the grouping of inventory items associated with the Inventory Mark-up table used to calculate the unit price when entering detail records in *Flat Rate Entry* (SP.000.00).

**Markup Descr**

*Markup Descr* displays the *Flat Rate Markup ID*. 
Skills Maintenance (SD.017.00)

Skills Maintenance (SD.017.00) creates an unlimited number of user-defined skills which must be held by a technician in the organization. This screen assigns an ID, description, and labor cost to a skill. This information is used in Problem Code Maintenance (SD.008.00) and Employee Maintenance (SD.007.00) to create parent-to-child relationships. In both cases, Skill ID is the child. That is, many possible skills can exist for every employee or problem code.

If a skill is associated with a problem code and an employee, the system checks in Service Call Entry (SD.200.00) and Dispatch (SD.201.00) that the assigned technician has the proper skills to repair a specific problem code.

Note: This screen is viewed in either form view or grid view by double-clicking or pressing the F4 key. To view a list of skill IDs, use “Skills List (SD.613.00)” on page 531.

Following are the field descriptions for Skills Maintenance (SD.017.00).

**Skill ID**
Skill ID accepts an unlimited number of unique user-defined skills. Skill ID links skills to employees and to problem codes.

**Description**
Description accepts a 30-character explanation of the service call’s skill identifier.

**Labor Cost**
Labor Cost contains the labor cost associated with Skill ID. This information is for reporting purposes only.
Tool Maintenance (SD.018.00)

*Tool Maintenance* (SD.018.00) adds tools and equipment into the system. This allows you to track the availability of equipment and tools. It also allows you to maintain a record of the inventory of company-owned tools that each technician carries. The information for each tool includes a unique tool ID with a description, VIN/serial number, make, year and model, date purchased, the condition with a date, the location with a description, and a usage ID with a description. To view a list of tool IDs, use “Tool List (SD.614.00)” on page 536.

A tool is signed out to an employee using *Employee Maintenance* (SD.007.00). The assigned tool appears in the *Employee Tool Information* subscreen for a specific employee.

Do not confuse this screen with *Equipment Entry* (SE.001.00). The *Employee Tool Information* subscreen is used for company-owned equipment and tools used in-house. The equipment entered in *Equipment Entry* (SE.001.00) is the customer’s equipment that is being installed and repaired.

![Figure 191: Tool Maintenance (SD.018.00)](image)

Following are the field descriptions for *Tool Maintenance* (SD.018.00).

**Tool ID**

*Tool ID* contains the unique identifier for a particular tool.

**Description**

*Description* accepts a 30-character explanation of the tool.

**VIN/Serial No.**

*Vin/Serial No.* contains the manufacturer’s unique number stamped or printed on the tool.

**Make**

*Make* contains the name of the tool’s manufacturer.

**Model**

*Model* contains the manufacturer’s designation for the tool.

**Year**

*Year* contains the purchase year of the tool.
Date Purchased
Date Purchased contains the acquisition date of the tool.

Condition
Condition contains the physical state of the tool.

Condition Date
Condition Date contains the date when the tool's condition was last evaluated.

Location Type
Location Type contains where the tool is stored.

Location
Location is the inventory site where the tool physically resides.

Location (Description)
Location (Description) contains an explanation of the inventory site.

Employee ID
Employee ID contains the identifier for the employee who has the tool.

Employee ID (Description)
Employee ID (Description) contains the name of the technician possessing the tool.

Usage ID
Usage ID accepts a 10-character identifier used to track tool usage.

Usage ID (Description)
Description ID contains a 30-character explanation of Usage ID.
Tool Usage Maintenance (SD.019.00)

*Tool Usage Maintenance* (SD.019.00) creates an unlimited number of user-defined tool usage codes which are then linked to employee hand tools. Tool usage codes are assigned to problem codes, giving the dispatching department the ability to confirm that a technician has the proper tools to repair a problem code.

**Note:** You can run a report that lists all of the usage codes and their descriptions. For more information, see “Tool Usage List (SD.615.00)” on page 536.

![Tool Usage Maintenance (SD.019.00)](image)

*Figure 192: Tool Usage Maintenance (SD.019.00)*

Following are the field descriptions for *Tool Usage Maintenance* (SD.019.00).

**Usage ID**

**Usage ID** accepts a 10-character identifier used to track tool usage.

**Description**

**Description ID** accepts a 30-character explanation of **Usage ID**.
Vehicle Maintenance (SD.020.00)

Vehicle Maintenance (SD.020.00) creates an unlimited number of vehicle records in the database. It contains useful information regarding the vehicle’s VIN (vehicle identification number), make, model, year, date purchased, and the location of the vehicle. Vehicle Maintenance (SD.020.00) also tracks odometer information. To view a list of vehicle IDs, use “Vehicle List (SD.617.00)” on page 538.

A vehicle entered in Vehicle Maintenance (SD.020.00) may be assigned to a service employee via Employee Personal Information (SD.007.01).

Figure 193: Vehicle Maintenance (SD.020.00)

Following are the field descriptions for Vehicle Maintenance (SD.020.00).

Vehicle ID
Vehicle ID displays the vehicle identifier associated with a vehicle that has an inventory site in the Inventory module.

Description
Description displays a 30-character explanation of the vehicle ID.

Manufacturer’s VIN
Manufacturer’s VIN displays the vehicle manufacturer’s identification number.

Make
Make displays the manufacturer of the vehicle.

Model
Model displays the model of the vehicle.

Year
Year displays the year the vehicle was manufactured.

Date Purchased
Date Purchased displays the date the vehicle was purchased.
Vehicle Inventory Location

Vehicle Inventory Location allows you to link the vehicle to an inventory site for information purposes only.

Location Name

Location Name displays the location description from the inventory sites in the Inventory module.

Date of Reading

Date of Reading displays the date when an odometer reading or mileage of the vehicle was recorded.

Vehicle Odometer

Vehicle Odometer displays the mileage of the vehicle. Vehicle Odometer helps ensure the vehicle is properly maintained.

Employee ID

Employee ID assigns a driver to the vehicle at the time the mileage was recorded.
Zip Code Maintenance (SD.021.00)

Zip Code Maintenance (SD.021.00) creates an unlimited number of zip codes into the system. The zip codes play a significant role in tracking information. Geographic Zone Maintenance (SD.009.00) uses zip codes to set up geographic zones. Zip codes are also important in tracking licensing because a zip code may be specific for a license.

Zip Code Maintenance (SD.021.00) provides a description of the zip code including the city, county, and state where it is located. It also gives the map page and coordinates for that zip code for national or regional directories. In addition, it allows you to attach licenses (either business or employee) to a zip code along with important phone numbers. To view a list of zip codes, see “Zip Code List (SD.618.00)” on page 538.

Note: License - ZIP Code Maintenance (SD.011.00) is used to associate related zip codes for a license. Entries here automatically appear on License - ZIP Code Maintenance (SD.011.00).

Figure 194: Zip Code Maintenance (SD.021.00)

Following are the field descriptions for Zip Code Maintenance (SD.021.00).

Zip Code
Zip Code accepts an unlimited number of unique zip codes into the system.

Description
Description is a 30-character explanation of the zip code.

City
City contains the city associated with the zip code. It is recommended that this information be typed in if License - ZIP Code Maintenance (SD.011.00) is used.

County
County contains the county associated with the zip code. It is recommended this information be typed in if License - ZIP Code Maintenance (SD.011.00) is used.

State
State contains the state associated with the zip code. It is recommended that this information be typed in if License - ZIP Code Maintenance (SD.011.00) is used.
Map Page
Map Page contains the map page associated with this zip code. Entering the map page defaults into the Site Maintenance (SD.025.00) record.

Coordinates
Coordinates contains the map page coordinates associated with this zip code. Entering the coordinates defaults in the Site Maintenance (SD.025.00) record.

Phones Tab
Phone Tab associates related phone numbers to a zip code, such as local building department phones numbers for different inspectors.

Business Tab
Business Tab adds necessary licenses to a zip code.

Employee Tab
Employee Tab adds necessary employee licenses to a zip code.
Earnings Type Maintenance (SD.022.00)

Use *Earnings Type Maintenance* (SD.022.00) to define employee earnings types (regular, overtime, etc.) if the Payroll module is not installed.

![Earnings Type Maintenance (SD.022.00)](image)

**Earnings Type ID**

**Earnings Type ID** is a unique identifying code that distinguishes the earnings type from all other earnings types in the database. An earnings type ID can be any alphanumeric code you assign (for example, REG for regular and OT for overtime). When you are editing an existing earnings type, a possible values lookup can be used to display a table of earnings types from which to choose. An existing ID cannot be deleted if it is assigned to an employee ID in *Employee Maintenance* (SD.007.00).

**Description**

**Description** is an explanation of **Earnings Type ID**.

**Pay Rate Multiplier**

**Pay Rate Multiplier** is used to compute earnings (cost). The default multiplier of 1.00 is automatically assigned. To pay an employee time-and-one-half for overtime, enter 1.50 as the pay rate multiplier.
Work Location Maintenance (SD.023.00)

Use Work Location Maintenance (SD.023.00) to define work locations if the Payroll module is not installed.

![Work Location Maintenance (SD.023.00)](image)

Figure 196: Work Location Maintenance (SD.023.00)

Work Location ID

**Work Location ID** is a unique identifying code distinguishing the work location from all other work locations in the database. A work location ID can be any alphanumeric code you assign (for example, a city abbreviation or a warehouse name). Note that once work location information is set up in the database, you cannot change the work location ID. The only way to change the ID is to delete and re-enter the work location’s information, using a new work location ID. An existing ID cannot be deleted if it is assigned to an employee ID in Employee Maintenance (SD.007.00).

Description

**Description** is an explanation of **Work Location ID**.

State/Prov

**State/Prov** typically uses a standard two-letter state abbreviation (see “State/Province Maintenance (21.290.00)” in the Shared Information online help or user guide).
Site Maintenance (SD.025.00)

Site Maintenance (SD.025.00) creates an unlimited number of sites for a customer. Open Site Maintenance (SD.025.00) by clicking the ellipsis (...) to the left of Site ID on Service Call Entry (SD.200.00) or by using the site menu option in Service Dispatch.

You can print a detailed listing of the sites. For more information, see “Site List (SD.612.00)” on page 531.

Site Maintenance, Customer Info Tab

Site Maintenance (SD.025.00) contains site information for a customer. This means that a customer has an unlimited number of sites, all with different profile information. Site ID is a user-defined unique identifier for a site.

Following are the field descriptions of the Customer Info tab for Site Maintenance (SD.025.00).

Customer ID

Customer ID validates the customer identifier with the service call. The customer name displays to the right of Customer ID.

Site ID

Site ID associates a unique user-defined site identifier with a customer identifier. It allows you to attach an unlimited number of sites to one customer. This identifier can be a maximum of 10 characters. It is recommended that you use a three-character identifying code, such as 001.

Print Letter

Print Letter flags this site for printing a “new customer” letter, using a mail merge function.
Description
Description accepts a 30-character explanation of Site ID.

Name
Name displays the person associated with the site. When a new customer is created in Customer Maintenance (08.260.00), a default site record is created in the database. Many sites can use the same name as long as they each have distinct identifying codes.

Attention
Attention identifies a contact person for a particular site. If a company has multiple sites, each site can be managed by a different contact person in the organization.

Address Line 1-2
Address Line 1-2 are the street addresses for a site. This address information is the work location where the requested service is performed.

City
City displays the municipality or city in which a site is located. City is populated by entering a valid zip/postal code from Zip Code Maintenance (SD.021.00).

State
State contains the standard two-letter state abbreviation.

Postal Code
Postal Code contains a five-digit zip code plus a four-digit extension. Entering a valid postal (zip) code populates the city, state, geographic zone, branch ID, map page, and map coordinates.

Country/Region
Country/Region is a standard two- to three-letter country or region code abbreviation.

Phone/Ext
Phone/Ext contains the phone number and extension for a specific site. This phone number can be different from the customer phone number since the number corresponds to the site.

Fax/Ext
Fax/Ext contains the fax number for a specific site. This fax number can be different from the customer fax number since the number corresponds to the site.

Sub Account
Sub Account is a validated field from the General Ledger Subaccounts Maintenance (01.270.00). The subaccount entered here may be used to populate the subaccount in Invoice - T & M Details (SD.203.00) and Flat Rate Order - Modify Details (SP.202.00) when completing service calls. In addition, the subaccount entered here may be used when using the accrual process, generating revenue process, and generating billing process in the Contracts module. It is recommended that you use the subaccount from the site only if the organization has three or more branches. Otherwise, use the subaccount from call types.
Tax ID 1, Tax ID 2, Tax ID 3, Tax ID 4
The tax information entered here is used in Invoice and Memo (08.010.00) in Accounts Receivable. This tax data is not used by the invoicing functions in Field Service Management.

Note: You can run a report that shows all taxable service calls, by tax ID. For more information, see “Use Taxes List (SD.628.00)” on page 537.

Special Pricing (button)
Site-Special Pricing Maintenance (SD.037.00) contains pricing commitments by inventory item at the site level. When an inventory item is entered in Invoice Entry (SD.202.00), the system checks the site special pricing to see if any pricing commitments exist.
Site Maintenance, Serv Call Info Tab

The **Serv Call Info** tab allows you to select default values so that the customer service representative can quickly process a service call once a site is selected.

![Image of Site Maintenance (SD.025.00), Serv Call Info tab](image)

Following are the field descriptions of the **Serv Call Info** tab for **Site Maintenance (SD.025.00)**.

**Customer ID**

Customer ID validates the customer identifier with the service call. The customer name displays to the right of **Customer ID**.

**Site ID**

Site ID displays a unique user-defined site identifier associated with a customer identifier.

**Created Date**

Created Date contains the date the site record was created. The date defaults to the system date. It is possible to override the default system date and enter a new date if desired.

**Map Page**

Map Page contains the map page that corresponds to the site address for assisting the dispatching department and service technician in locating a site. Map Page populates when a zip/postal code is entered.
Coordinates
Coordinates are the map coordinates that correspond to the map page and to the site address for assisting the dispatching department and service technician in locating a site. Coordinates populates at the time a zip/postal code is entered.

Max Service Amount
Max Service Amount contains the maximum allowable amount for service call without the need for authorization. Max Service Amount is valid only when the Yes option is selected in Tenant Auth To Call.

Tenant Auth to Call
Tenant Auth to Call alerts the customer service representative during the creation of a service call whether the caller has the authority to place a new service request. If the No option is selected, a soft warning message “Tenant Not Authorized to Call” defaults during service call entry.

Media ID
Media ID contains the source of media which this site used in order to find an organization. This is used for tracking purposes. The media ID defaults into the service call at the time a new record is being processed.

Materials Markup ID
Material Markup ID selects the pricing mark-up table, if desired, to automatically calculate the unit price from the unit cost when entering records in Invoice - T & M Details (SD.203.00). For setting up the actual mark-up tables, see Inventory Mark-up Maintenance (SD.026.00).

Labor Markup ID
Labor Markup ID selects the pricing mark-up table, if desired, to automatically calculate the unit price from unit cost when entering labor records in Invoice - T & M Details (SD.203.00). For setting up the actual mark-up tables, see Inventory Mark-up Maintenance (SD.026.00).

Geographic Zone
Geographic Zone contains the valid geographic zone associated with a site. The Geographic Zone may populate automatically if a valid zip code is associated with a geographic zone ID.

Branch ID
Branch ID contains the valid branch identifier that identifies the branch to which this site belongs. In addition, entering a branch ID combined with enabling the Auto Number Branch Prefix from Service Series Setup Maintenance (SD.000.00) adds a prefix to the service call record. The branch ID populates automatically by entering the zip code.

Tax ID
Tax ID contains the associated tax identifier (sales tax) for this site. Tax ID is a required field. Tax ID is used by the invoicing functions in Field Service Management. When entering tax IDs in the Shared Information module, select Item for Calculation Type.

Dwelling Type
Dwelling Type attaches a dwelling type to a site.

P.O. Number
P.O. Number selects whether a purchase order is necessary in order to process and save a service call in Service Call Entry (SD.200.00). If the Required option is selected, a proactive message displays on the Other Info tab in Service Call Entry (SD.200.00), and the call cannot be saved until missing data is entered.
Sec. Entry Code
Sec. Entry Code populates a security entry code associated with the site record making it unnecessary to request the same information from the customer for each new service request.

Blanket PO Number
Blanket PO Number contains the 15-character purchase order number used as a default for a new service call.

Call Type
Call Type contains the call type that defaults to Service Call Entry (SD.200.00) when a specific site is selected. This call type is the most frequent trade used by this site or customer class.

Status ID
Status ID contains the default call status identifier that populates Service Call Entry (SD.200.00). The recommended Status ID is Open.

Proj. Manager
Proj. Manager selects a Project Manager or Service Manager for a site. Proj. Manager is for reporting purposes only.

Salesperson
Salesperson contains the salesperson for a site. This required field populates onto Service Call Entry (SD.200.00). If there is no salesperson, type in the default House as the salesperson.

Technician
Technician contains the default technician for a site. The entered technician populates into Service Call Entry (SD.200.00). If technicians randomly change, do not enter a value in Technician.

Prc Plan ID
Prc Plan ID associates a site with a flat rate pricing plan. When a flat rate invoice is created, the entered value defaults with the appropriate price calculation associated with the pricing plan ID. Prc Plan ID is useful only when invoicing on a flat rate basis.

Pyt Method
Pyt Method displays the default payment method for a site. Pyt Method is for reporting purposes only.

Priority
Priority contains the default call priority value associated with the site.

Special Pricing (button)
Site-Special Pricing Maintenance (SD.037.00) contains pricing commitments by inventory item at the site level. When an inventory item is entered in Invoice Entry (SD.202.00), the system checks the site special pricing to see if any pricing commitments exist.
Site Maintenance, Form View

Site Maintenance (SD.040.00) is the same as Site Maintenance (SD.025.00) except that it opens in form view as opposed to grid view.

Figure 199: Site Maintenance (SD.040.00), form view
Inventory Mark-Up Maintenance (SD.026.00)

Inventory Mark-Up Maintenance (SD.026.00) creates an unlimited number of user-defined inventory mark-up tables. These tables are used to mark-up the price of inventory items associated with a flat rate. For example, when recalculating detail for a flat rate using Price Update Process (SP.203.00) in the Flat Rate Pricing module, if an inventory item and a mark-up ID are entered, the system looks at the cost of the item and selects the proper cost multiplier. This marks up the price of the individual inventory items.

![Inventory Mark-Up Maintenance (SD.026.00)](image)

Figure 200: Inventory Mark-Up Maintenance (SD.026.00)

Following are the field descriptions for Inventory Mark-Up Maintenance (SD.026.00).

**Mark-Up ID**

Mark-Up ID creates a user-defined alphanumeric mark-up identifier. It is recommended that you create a mark-up ID for labor with a cost multiplier of 0. Generally, labor items are excluded when using Price Update Process (SP.203.00) in the Flat Rate Pricing module, as labor rates are usually fixed amounts.

**Description**

Description is 30-character explanation of the mark-up identifier.

**From/To**

From/To creates a cost range. The cost multiplier is dependent on the ranges created in these two fields.

**Cost Multiplier**

Cost Multiplier contains the amount that is multiplied to an inventory cost based on the applicable cost range.

**Above**

Above contains the multiplier for the highest level of the mark-up table.

**Note:** You can run a report of the inventory mark-up IDs. For more information, see “Inventory Mark-Up (SD.619.00)” on page 506.
Pager Template (SD.031.00)

Pager Template (SD.031.00) defines the data to extract from the service call and send to a technician from Dispatch (SD.201.00). You can define the data fields and their order as a default during paging. When you issue a page, you can override the text that is generated; the template serves as the default.

An unlimited number of pager templates may be defined. A template may be assigned to a technician in Employee Maintenance (SD.007.00).

Open Pager Template (SD.031.00) by clicking Pager Configuration in Service Series Setup Maintenance (SD.000.00).

![Pager Configuration](image)

Figure 201: Pager Template (SD.031.00)

Following are the field descriptions for Pager Template (SD.031.00).

**Template ID**

Template ID is a template identifier. This unique code can be a maximum of 10 characters. This value is referenced when sending an alphanumeric paging message to a technician.

**Description**

Description is an explanation for the template identifier.

**Available Fields**

Available Fields contains a list of all of the available fields that can be transmitted in the page. Select the field you want to include in the page. When selecting more than one field, select them in the order you wish the fields to be displayed.

**Selected Fields**

Selected Fields contains the list of the fields that have been selected for this pager template identifier.

**Add (button)**

Clicking Add moves highlighted fields in the Available Fields column to the Selected Fields column.
Add All (button)
Add All adds all the fields in the Available Fields column to the Selected Fields column.

Remove (button)
Clicking Remove moves highlighted fields in the Selected Fields column to the Available Fields column.

Remove All (button)
Remove All moves all fields in the Selected Fields column back to the Available Fields column.

OK (button)
OK closes the screen and saves any changes.
Site - Special Pricing Maintenance (SD.037.00)

Site - Special Pricing Maintenance (SD.037.00) accepts special pricing and special pricing revisions by inventory items for a selected site. Open Site - Special Pricing Maintenance (SD.037.00) by clicking **Special Pricing** on Site Maintenance (SD.025.00). The values entered in Site - Special Pricing Maintenance (SD.037.00) affect **Unit Price** and **Extended Price** in Invoice - T & M Details (SD.203.00).

![Site - Special Pricing Maintenance (SD.037.00)](image)

Figure 202: Site - Special Pricing Maintenance (SD.037.00)

Following are the field descriptions for Site - Special Pricing Maintenance (SD.037.00).

**Customer ID**

Customer ID displays the customer identifier and name from Site Maintenance (SD.025.00).

**Customer ID (Description)**

Customer ID (Description) contains the name of the customer.

**Site ID**

Site ID displays the site identifier and name from Site Maintenance (SD.025.00).

**Site ID (Description)**

Site ID (Description) contains an explanation of the customer site.

**Inventory ID (header)**

Use Inventory ID to specify selection criteria to apply when you click **Refresh**. You can specify any of the following values, or a combination of all three:

- Asterisk (*) – This is the default value. An asterisk indicates that you want to display all inventory IDs for which you have previously set up special pricing for the customer ID and site ID shown. Or, you can use the asterisk as a wildcard. For example, if you type **HON***, and then click **Refresh**, the screen displays inventory IDs that begin with "HON" such as HON-672L-L and HON-673L-S. If you type ***L**, and then click **Refresh**, the screen displays inventory IDs that end with “L” such as HON-
672-L and HON-674-L-L. Lastly, if you type HON*S, and then click **Refresh**, the screen displays inventory IDs that both begin with “HON” and end with “S” such as HON-673L-S and HON-674L-S.

- **Question mark (?)** – Use one or more question marks as a wildcard placeholder. For example, if you type HON-????-L, and then click **Refresh**, the screen displays inventory IDs that begin with “HON-” and end with “-L” that also have four characters in the middle. The screen displays both HON-672L-L and HON-673L-L, but not HON-672L-P.

- **Alphanumeric characters** – You can use alphabetic and numeric characters, within the restrictions specified for the inventory ID flexible key in Flexkey Definition (21.320.00).

**Refresh (button)**

Click **Refresh** to display the special prices for the inventory IDs that meet the criteria that you specified.

**Note:** Clicking refresh displays only those inventory IDs for which you have previously set up one or more special prices for the customer ID/site ID combination displayed.

**Inventory ID (grid/detail)**

**Inventory ID** is a valid inventory ID from the Inventory module. Press F3 to display a list of possible inventory ID values, and then select an inventory ID from the list to begin creating a new special price. If you specify a special price, the special price overrides the stock base price found in Inventory Items (10.250.00) during invoice entry.

**Inventory Description**

**Inventory Description** displays the explanation of the inventory identifier.

**Start Date**

**Start Date** displays the first date when the special price is active. A blank start date indicates that the special price has no start, that is 01/01/1900.

**End Date**

**End Date** displays the last date when the special price is active. A blank end date indicates that the special price has no end, that is 12/31/9999.

**Pricing Option**

**Pricing Option** contains the pricing modification associated with the inventory ID based on a fixed amount or percent. The unit price amount in invoice entry is affected by **Pricing Option. Price/Disc %, Start Date, End Date**, and also **Stock Base Price** in Inventory Items (10.250.00).

**Price/Disc %**

**Price/Disc %** overrides the stock base price on the invoice if **Amount** is selected in **Pricing Option**. If **Discount %** is selected in **Pricing Option**, the stock base price is reduced or increased by the percentage specified in **Price/Disc %**.

**Revised Start Date**

**Revised Start Date** displays the start date that will go into effect when you apply the revisions to the special price.

**Revised End Date**

**Revised End Date** displays the end date that will go into effect when you apply the revisions to the special price.
Revised Price/Disc %
Revised Price/Disc % displays the amount or percentage that will go into effect when you apply the revisions to the special price.

Price Description
Price Description displays a description of the special price. For example, you might use “March Promotion” or “Seasonal Discount” to describe a particular special price.

OK (button)
OK closes the screen and saves any changes.
Geographic Zone - Employees (SD.038.00)

Use Geographic Zone - Employees (SD.038.00) to assign one or more employees to a geographic zone. Geographic Zone - Employees (SD.038.00) also allows you to quickly view the technicians assigned to a particular geographic zone.

Note: The Graphical Dispatch Board (SD.900.00) filters on geographic zones. Employees must be assigned to the geographic zone included in the Queue View selected on the Graphical Dispatch Board (SD.900.00), Options tab to be included in the data selected for viewing. If Queue ID on the Graphical Dispatch Board (SD.900.00), Options tab is blank, all technicians are included even if they are not assigned to a geographic zone.

Refer to Employees - Geographic Zone (SD.039.00) to view all the geographic zones to which a particular technician has been assigned.

![Geographic Zone - Employees (SD.038.00)](image)

**Figure 203: Geographic Zone - Employees (SD.038.00)**

Following are the field descriptions for Geographic Zone - Employees (SD.038.00).

**Geo Zone ID**

*Geo Zone ID* contains the geographic zone identifier from Geographic Zone Maintenance (SD.009.00). *Geo Zone ID* may be typed directly, or may be selected from a list of available geographic zones by pressing F3, or by double-clicking the right mouse button.

**Employee ID**

*Employee ID* contains the employee identifiers from Employee Maintenance (SD.007.00) of the employees you wish to include in the geographic zone. The employee ID may be typed directly, or may be selected from a list of available employees by pressing F3 or double-clicking the right mouse button.

**First Name**

*First Name* contains the first name of the employee.

**Last Name**

*Last Name* contains the last name of the employee.
Employees - Geographic Zones (SD.039.00)

Use Employees - Geographic Zones (SD.039.00) to determine the geographic zone(s) linked to a particular employee. Information from Employees - Geographic Zones (SD.039.00) is used by Queue ID in Graphical Dispatch Board (SD.900.00).

Note: The Graphical Dispatch Board (SD.900.00) filters on geographic zones. Employees must be assigned to the geographic zone included in the queue view selected on the Graphical Dispatch Board (SD.900.00), Options tab to be included in the data selected for viewing. If Queue ID on the Graphical Dispatch Board (SD.900.00), Options tab is blank, all technicians are included even if they are not assigned to a geographic zone.

Refer to Geographic Zone - Employees (SD.038.00) to view all the employees assigned to a specific geographic zone.

Following are the field definitions for Employees - Geographic Zones (SD.039.00).

**Employee ID**

*Employee ID* contains the employee identifiers from Employee Maintenance (SD.007.00) to which you will assign geographic zones. The employee ID may be typed directly, selected from a list of available employees by pressing F3, or selected by double-clicking the right mouse button.

**First Name**

*First Name* contains the first name of the employee.

**Last Name**

*Last Name* contains the last name of the employee.

**Geo Zone ID**

*Geo Zone ID* contains the geographic zone identifier from Geographic Zone Maintenance (SD.009.00) to which the employee is being assigned. *Geo Zone ID* may be typed directly, selected from a list of available geographic zones by pressing F3, or selected by double-clicking the right mouse button.

**Description**

*Description* contains the description of the geographic zone.
Customer Site Group (SD.041.00)

Use Customer Site Group (SD.041.00) to link customer site IDs that you set up in Site Maintenance (SD.025.00) into a group. This lets you revise special prices by a customer site group ID instead of by a single customer site ID in Site – Special Pricing Revisions (SD.042.00).

![Customer Site Group (SD.041.00)](image)

Figure 205: Customer Site Group (SD.041.00)

The following are the field descriptions for Customer Site Group (SD.041.00).

**Customer Site Group ID**

**Customer Site Group ID** contains the identifier that you assign to a group of customer sites.

**Customer ID**

**Customer ID** contains the identifier for a customer from Customer Maintenance (08.260.00). The possible values list contains only those customer IDs for which you previously set up one or more sites in Site Maintenance (SD.025.00).

**Customer Name**

**Customer Name** displays the name of the customer from Customer Maintenance (08.260.00).

**Customer Site ID**

**Customer Site ID** contains the identifier for a customer site from Site Maintenance (SD.025.00).

**Customer Site Name**

**Customer Site Name** displays the name of the customer site from Site Maintenance (SD.025.00).
**Site – Special Pricing Revisions (SD.042.00)**

Use Site – Special Pricing Revisions (SD.042.00) to update multiple revised price/disc% at the same time. You can select the price/disc% that you want to update by customer site ID, customer site group ID, and customer site ID. Then, you can further refine your selection by inventory ID, current price/disc%, start date, and end date. **Customer Site Group ID**, **Customer ID**, **Customer Site ID**, and **Inventory ID** support the use of both an asterisk (*) as a wildcard and a question mark (?) as a mask.

After you specify the selection criteria that you want, input the new revised price, flat increases/decreases, or percent increases/decreases. Also, you can specify the new start date and end date. Then, you can review the proposed changes by clicking **View Pending Price/Disc% Revisions** to open the **View Pending Price Revisions** (SD.042.01) screen.

When you click **Begin Processing**, the proposed revised special prices are placed into **Revised Price/Disc%**, as seen in Site – Special Pricing Maintenance (SD.037.00) or in the **Special Prices (SSRS)** (SD.645.00) report.

The following are the field descriptions for Site – Special Pricing Revisions (SD.042.00).
Pricing Option
Pricing Option contains the pricing modification associated with the inventory ID based on a fixed amount or percent.

Customer Site ID (area)
The Customer Site ID area contains the following options:

All Customer Site IDs (option)
All Customer Site IDs lets you specify that you want to create revised prices for all customer site IDs. When you select this option, all selection boxes in this area are disabled.

Customer Site Group ID (option)
Customer Site Group ID lets you specify that you want to create revised prices by Customer Site Group ID. This option is disabled if you have not yet created a customer site group in Customer Site Group (SD.041.00). When you select this option, all selection boxes in this area are enabled.

Customer Site ID (option)
Customer Site ID lets you specify that you want to create revised prices by customer site ID. When you select this option, the Customer Site Group ID selection box is disabled and the Customer ID selection box and the Customer Site ID selection box are enabled.

The Customer Site ID area contains the following boxes for selection:

Customer Site Group ID (box)
Customer Site Group ID lets you specify the customer site group ID(s) by which you want to refine the search. You can specify any of the following values, or a combination of all three:

- Asterisk (*) – This is the default value. An asterisk indicates that you want to display all inventory IDs for which you have previously set up special pricing for the customer ID and site ID shown. Or, you can use the asterisk as a wildcard. For example, if you type HON*, and then click Refresh, the screen displays inventory IDs that begin with “HON” such as HON-672L-L and HON-673L-S. If you type *L, and then click Refresh, the screen displays inventory IDs that end with “L” such as HON-672L-L and HON-674L-L. Finally, if you type HON*S, and then click Refresh, the screen displays inventory IDs that both begin with “HON” and end with “S” such as HON-673L-S and HON-674L-S.

- Question mark (?) – Use one or more question marks as a wildcard placeholder. For example, if you type HON-????-L, and then click Refresh, the screen displays inventory IDs that begin with “HON-” and end with “-L” that also have four characters in the middle. The screen displays both HON-672L-L and HON-673L-L, but not HON-672L-P.

- Alphanumeric characters – You can use alphabetic and numeric characters, within the restrictions specified for the inventory ID flexible key in Flexkey Definition (21.320.00).

Customer ID (box)
Customer ID lets you specify the customer ID(s) by which you want to refine the search. You can specify an asterisk (*) wildcard, question mark (?) mask, alphanumeric characters, or a combination of the three.

Customer Site ID (box)
Customer Site ID lets you specify the customer site ID(s) by which you want the refine the search. You can specify an asterisk (*) wildcard, question mark (?) mask, alphanumeric characters, or a combination of the three.

Additional Selection Criteria (area)
The Additional Selection Criteria area contains the following options:
Inventory ID
Inventory ID lets you refine the search results by the inventory ID. An asterisk (*) functions as a placeholder and a question mark (?) functions as a mask. You can specify an asterisk (*) wildcard, question mark (?) mask, alphanumeric characters, or a combination of the three.

Current Price
Current Price lets you refine the search results by a specific price. This box is enabled if the Pricing Option is Amount.

Current Percent
Current Percent lets you refine the search results by a specific percent. This box is enabled if the Pricing Option is Discount %.

Start Date
Start Date lets you refine the search results by the start date.

End Date
End Date lets you refine the search results by the end date

Update price plans with revised price or percent not equal to zero (check box)
Select the Update price plans with revised price or percent not equal to zero check box to include only special pricing plans that contain nonzero values and exclude any special pricing plans with a revised price/disc % equal to zero.

Change to Revised Price or Discount % (area)
The Change to Revised Price or Discount % area contains the following options:

New Revised Price
New Revised Price contains the new revised price that is placed into Revised Price/Disc % in Site – Special Pricing Maintenance (SD.037.00). This value replaces the existing value. This box is enabled if the Pricing Option is Amount.

Revised Price Flat Increase/Decrease
Revised Price Flat Increase/Decrease contains the flat amount by which you want to increase (positive) or decrease (negative) the existing current price. This box is enabled if the Pricing Option is Amount.

Note: The new revised price cannot be less than zero. If the calculation results in the new revised price being less than zero, the process sets the price to exactly zero.

Revised Price % Increase/Decrease
Revised Price % Increase/Decrease contains the percentage by which you want to increase (positive) or decrease (negative) the existing current price. This box is enabled if the Pricing Option is Amount.

Note: The new revised price cannot be less than zero. If the calculation results in the new revised price being less than zero, the process sets the price to exactly zero.

New Revised Discount %
New Revised Discount % contains the new revised discount % that will be placed into Revised Price/Disc % in Site – Special Pricing Maintenance (SD.037.00). This value replaces the existing value. This box is enabled if the Pricing Option is Discount %.
Revised Discount % Flat Increase/Decrease

Revised Discount % Flat Increase/Decrease contains the percentage by which you want to increase (positive) or decrease (negative) the existing discount %. This box is enabled if the Pricing Option is Discount %.

New Start Date

New Start Date contains the start date that you want to set for the revised price. A blank date indicates that you do not want to override the existing revised start date.

New End Date

New End Date contains the end date that you want to set for the revised price. A blank date indicates that you do not want to override the existing revised end date.

View Pending Price/Disc % Revisions (button)

Click View Pending Price/Disc% Revisions to review all special prices that match the criteria in the screen (except Update price plans with revised price or percent not equal to zero) in View Pending Special Pricing Revisions (SD.042.01). Close the subscreen when you are finished.

Begin Processing (button)

Click Begin Processing to update the Revised Price/Disc% in Site – Special Pricing Maintenance (SD.041.00).

View Pending Special Pricing Revisions (SD.042.01)

View Special Pricing Revisions (SD.042.01) displays the special prices that fit the selection criteria that you specified in Site – Special Pricing Revisions (SD.042.00).

The following are the field descriptions for View Special Pricing Revisions (SD.042.01).

Customer ID

Customer ID displays the customer ID to which the special price is related.
Customer Site ID
Customer Site ID displays the customer site ID to which the special price is related.

Inventory ID
Inventory ID displays the inventory ID to which the special price is related.

Price Type
Price Type displays the kind of special price. The valid values are Amount and Discount %.

Price/Discount %
Price/Discount % displays the current Price/Disc% as seen in Site – Special Pricing Maintenance (SD.037.00).

Revised Price/Discount %
Revised Price/Discount % displays the current Revised Price/Disc% as seen in Site – Special Pricing Maintenance (SD.037.00).

Start Date
Start Date displays the current Start Date as seen in Site – Special Pricing Maintenance (SD.037.00).

New Start Date
New Start Date displays the current Revised Start Date as seen in Site – Special Pricing Maintenance (SD.037.00).

End Date
End Date displays the current End Date as seen in Site – Special Pricing Maintenance (SD.037.00).

New End Date
New End Date displays the current Revised End Date as seen in Site – Special Pricing Maintenance (SD.037.00).

OK (button)
Click OK to close View Special Price Revisions (SD.042.01).
Update Special Pricing with Revisions (SD.043.00)

Use Update Special Pricing with Revisions (SD.043.00) to update the **Price/Disc%** in **Site – Special Pricing Maintenance (SD.037.00)** with the **Revised Price/Disc%**.

![Update Special Pricing with Revisions (SD.043.00)](image)

Figure 208: Update Special Pricing with Revisions (SD.043.00)

The following are the field descriptions for Update Special Pricing with Revisions (SD.043.00).

**Revise Special Pricing with Start Dates on or prior to**

Use **Revise Special Pricing with Start Dates on or prior to** in order to specify the special prices that you want to update, by restricting the up to only those special prices that contain a Start Date on or before the date that you specify. The default value is the current business date.

**Categories (area)**

The **Categories** area contains the following options:

- **All Special Prices** (option)
  
  **All Special Prices** lets you update all special prices that have a revised price/disc%. All additional selection is disabled. This selection is the default.

- **Customer Site Group ID** (option)
  
  **Customer Site Group ID** lets you select a customer site group ID to narrow your selection. This option is disabled if you have not previously created a customer site group ID. The **Customer Site Group ID**, **Customer ID**, **Customer Site ID**, and **Inventory ID** boxes are enabled. You can specify a value in one or more boxes.

- **Customer ID** (option)
  
  **Customer ID** lets you select a customer ID to narrow your selection. The **Customer ID** and **Inventory ID** boxes are enabled. You can specify a value in one or both boxes.
Customer Site ID (option)
Customer Site ID lets you select a customer site ID to narrow your selection. The Customer Site Group ID box is disabled and all other boxes are enabled.

Inventory ID (option)
Inventory ID lets you select only an inventory ID to narrow your selection. The Inventory ID box is enabled and all other boxes are disabled. The default is an asterisk (*) which represents all values.

Customer Site Group ID (box)
Use Customer Site Group ID to specify a customer site group ID value to refine your selection. You can use an asterisk (*) wildcard, a question mark (?) placeholder, alphanumeric characters, or a combination of the three.

Customer ID (box)
Use Customer ID to specify a customer ID value to refine your selection. You can use an asterisk (*) wildcard, a question mark (?) placeholder, alphanumeric characters, or a combination of the three.

Customer Site ID (box)
Use Customer Site ID to specify a customer site ID value to refine your selection. You can use an asterisk (*) wildcard, a question mark (?) placeholder, alphanumeric characters, or a combination of the three.

Inventory ID (box)
Use Inventory ID to specify an inventory ID value to refine your selection. You can use an asterisk (*) wildcard, a question mark (?) placeholder, alphanumeric characters, or a combination of the three.

Begin Processing (button)
Click Begin Processing to update the Price/Disc% with the Revised Price/Disc%. Start Date with Revised Start Date, and End Date with Revised End Date. This process also clears the values from the Revised Price/Disc%, Revised Start Date, and Revised End Date for the selected special prices.
Notes Template (SD.410.00)

Notes Template (SD.410.00) creates a template for notes to efficiently add boilerplate notes onto a service call for invoicing. In addition, these templates are used in Contract Equipment (SN.001.05) in the Service Contracts module.

![Image of Notes Template (SD.410.00)]

Figure 209: Notes Template (SD.410.00)

Following are the field descriptions for Notes Template (SD.410.00).

**Template ID**

Template ID associates a pager template with the employee.

**Description**

Description contains the 30-character explanation of the Template ID.
Employee Schedule (SD.904.00)

Use Employee Schedule (SD.904.00) to define a date, or a range of dates, when a specific technician is not available for service calls.

**Note:** An alternative to using Employee Schedule (SD.904.00) is to set the status of an employee to a value other than Active using Employee Maintenance (SD.007.00). If an employee’s status is set to Inactive, the employee will not display on the Graphical Dispatch Board (SD.900.00). If the status is set to Vacation, Sick, or Personal, a bar appears across all days and times of the Graphical Dispatch Board (SD.900.00) schedule pane indicating that the employee is not available for assignments. Use Employee Schedule (SD.904.00) when you want to specify days that a technician is not available.

- Dates entered in Employee Schedule (SD.904.00) are displayed in the Graphical Dispatch Board (SD.900.00) as a task bar, providing a visual indication of when a technician is not available to take service calls.
- Graphical Dispatch Board (SD.900.00) task bars created in Employee Schedule (SD.904.00) are color-coded based on settings in Graphical Dispatch Setup Maintenance (SD.902.00).
- Indicating a technician is on vacation, sick, or otherwise not available does not prevent a technician from being assigned to a task during the period of unavailability. The purpose is to indicate the technician’s status, but if a dispatcher must assign the technician, the dispatcher will be able to do so.
- To absolutely prevent a dispatcher from assigning a technician to a task, you must change the technician’s status using Employee Maintenance (SD.007.00). If the status is anything other than Active at the time the assignment is being made, the technician cannot be assigned to service calls.

![Employee Schedule (SD.904.00)](image)

**Figure 210: Employee Schedule (SD.904.00)**

Following are the field descriptions for Employee Schedule (SD.904.00).

**Employee ID**

**Employee ID** contains the technician’s employee ID from Employee Maintenance (SD.007.00). The employee ID can be entered directly, or selected from a list of employee IDs by pressing F3 or by double-clicking the right mouse button.

**Employee Status (not labeled)**

**Employee Status** contains the current status of the technician as shown in Employee Maintenance (SD.007.00).
First, M.I., Last Name
The First, M.I., Last Name boxes contain the technician’s name as shown in Employee Maintenance (SD.007.00).

Start Date
Start Date contains the first date the status is applicable.

End Date
End Date contains the last date the status will be applicable.

Status
Status contains the technician status during the dates entered. Status changes made via Employee Schedule (SD.904.00) do not change the employee status recorded in Employee Maintenance (SD.007.00). Options are:
- Inactive
- Vacation
- Sick
- Personal

OK (button)
Clicking OK saves the data and closes the screen.
Processing Screens

Processing Screens Overview

The Service Dispatch module is a comprehensive service business system that is designed to track every detail of a service organization. Several processing screens exist in the system that enables users to completely automate service call processing, dispatching and invoicing efficiently and accurately.

Generate Inventory (SD.306.00) allows organizations to effectively manage inventory quantity and costs by creating cost of goods sold batches in Issues (10.020.00). Purchase orders and purchase order receipts can also be generated without completing service calls. Generate Payroll (SD.302.00) integrates with the Payroll module by creating timesheet entries in Payroll Time & Dollar Entry (02.020.00) for hours worked by technicians.

Dispatch - Service Call Page (SD.024.00)

Dispatch - Service Call Page (SD.024.00) sends an alphanumeric page to an employee in the field and assigns a technician to the related service call. Open Dispatch - Service Call Page (SD.024.00) by clicking Page in Dispatch (SD.201.00).

Following are the field descriptions for Dispatch - Service Call Page (SD.024.00).

Service Call ID

Service Call ID displays the currently selected service call. If you click Assign To Call, this is the service call that is updated.

Technician ID

Technician ID contains the technician assigned to the call. However, a different technician may be selected if you desire. If a new technician is selected, you can assign the technician ID to the service call by clicking Assign To Call.

Call Status ID

Call Status ID updates the status of the service call when you assign the paged technician. Enter the desired call status before clicking Assign To Call.
Template ID

Template ID automatically extracts data from the service call and places it in the alphanumeric message area of Dispatch - Service Call Page (SD.024.00). Although Template ID is required, you can completely erase the default message and enter your own message.

Number

Number contains the pager number or the PIN number of the technician.

Auto-Retry

Auto-Retry continues to try to send the page if the initial try is unsuccessful.

Page (button)

Page initiates the paging process. It sends alphanumeric text information to the technician base on the paging service that has been set up in Service Series Setup Maintenance (SD.000.00).

Assign To Call (button)

Assign To Call automatically assigns the paged technician to the service call.
Service Call Invoice Approval (SD.204.00)

Service Call Invoice Approval (SD.204.00) allows you to review multiple service calls from one screen prior to invoicing. You can use a variety of filters to control which service calls are loaded into the grid. Once the calls are in the grid you can select one and click **Detail** to open Invoice Entry (SD.202.00). From Invoice Entry (SD.202.00) you can review and/or modify invoicing information, including the invoicing details for labor and material. From Service Call Invoice Approval (SD.204.00) you may also click **Invoice Notes** to review and/or modify the invoice notes related to the service call.

You can change the values in **Invoice Date** and **Invoice Handling**, copy the new values to the clipboard, and then paste your changes to any number of rows, saving you time when making mass changes. After you complete your review of the service calls, you can indicate which changes should be permanent by selecting the **Selected** check box. When you click **Update**, all service calls with **Selected** marked are updated with the changes you have made. All indicated service calls will be updated at the same time. This process allows you to easily review and make a large number of service calls ready for invoicing at the same time from one screen.

**Note:** When you click **Update**, a validation is performed on all service calls marked with **Invoice Handling** set to Approved. An invoice is updated to Approved only if:

- The invoice has at least one detail line.
- The **Handling** value on Service Call Entry (SD.200.00) for the service call is not set to Quote.
- The revenue account and subaccount combination is valid for each detail line in the invoice.
- The Cost of Goods Sold account and subaccount combination is valid for each detail line in the invoice.
- The tax IDs for the invoice are valid and the tax total for the invoice is the sum of the detail tax by tax ID.
- **Invoice Date** is not blank.

![Service Call Invoice Approval (SD.204.00)](image)

*Figure 212: Service Call Invoice Approval (SD.204.00)*
Following are the field descriptions for *Service Call Invoice Approval* (SD.204.00).

**Note:** You may select as many **Select Criteria** check boxes as required to filter your invoice approval list, or you may leave all the boxes cleared. If no Select Criteria is selected, all service calls appear in the grid.

**Customer (check box)**
Select **Customer** to filter the list based on a single customer ID.

**Customer**
Customer contains the customer ID and customer name you wish to use as a filter. Customer ID can be entered directly into the cell, or selected from a list of available customer IDs by pressing F3 or by double-clicking the right mouse button in the field.

**Branch ID (check box)**
Select **Branch ID** to filter the list based on a single branch ID.

**Branch ID**
**Branch ID** contains the 10-character code and description for the particular branch you wish to use as a filter. Branch IDs are defined in **Branch Maintenance** (SD.001.00). **Branch ID** can be entered directly into the field, or selected from a list of available Branch IDs by pressing F3 or by double-clicking the right mouse button in the field.

**Supervisor (check box)**
Select **Supervisor** to filter the list based on a single supervisor employee ID.

**Supervisor**
**Supervisor** contains the employee ID from **Employee Maintenance** (SD.007.00) and the name of the supervisor that you wish to use as a filter. You can enter the employee ID of the supervisor directly into the field, or select from a list of all available employee IDs by pressing F3 or by double-clicking the right mouse button in the field.

The supervisor for an employee is defined in **Employee Maintenance** (SD.007.00).

**Technician (check box)**
Select **Technician** to filter the list based on a single technician employee ID.

**Technician**
**Technician** contains the employee ID from **Employee Maintenance** (SD.007.00) and the name of the technician you wish to use as a filter. **Technician** can be entered directly into the field, or selected from a list of available technician employee IDs by pressing F3 or by double-clicking the right mouse button in the field.

**Invoice Handling (check box)**
Select **Invoice Handling** to filter the list based on a specific invoice handling value. The invoice handling value is found on **Invoice Entry** (SD.202.00).
Invoice Handling (list box)
Select the type of invoiced handling you wish to approve. The following options are available:

- In Progress
- Review
- Rejected
- Approved
- Completed (Note: Invoice Handling set to Completed should not be changed to any other value.)
- Hold

Completed From (check box)
Select Completed From to filter the list based on a specific date range of when work on the service calls had been completed. The completed date is found on Invoice Entry (SD.202.00).

Completed From
Completed From contains a date range that filters the selection of service calls so that only service calls with a completed date falling within the date range specified are used to populate the grid.

Period (check box)
Select Period to filter the list based on a specific period to post value. The period to post value is found on Invoice Entry (SD.202.00).

Period
Period contains the period to post that service calls brought into the grid must have if the Period check box is selected.

Refresh (button)
Clicking Refresh causes the system to refresh the grid based on the current selection criteria.

Selected (check box)
Selected indicates that changes made to Invoice Date, Invoice Handling and/or Invoice Note values update the source service call when Update is pressed. Note that you can copy and paste the “x” in the box to any number of rows in sequence.

Service Call ID
Service Call ID contains the service call identifier of the service call being reviewed.

Customer ID
Customer ID contains the customer ID used on the service call. Note that the Bill To customer may or may not be the same as this customer ID. To confirm that the correct bill to customer ID is being used, click the Detail button and review the Bill To value on Invoice Entry (SD.202.00).

Invoice Date
Invoice Date contains the date you want the system to use as the date of the invoice. This date is used for accounts receivable aging purposes. Invoice Date can be changed directly in the grid. Note that you can copy and paste Invoice Date to any number of rows in sequence.

Note: You can use the copy and paste feature to perform a mass update to this field.
Invoice Handling

Invoice Handling contains the invoice handling status of the service call. The invoice handling value can be changed directly in the grid. Setting Invoice Handling to Approved makes the service call available for invoicing in Service Call Invoice (SD.640.00) or Service Call Invoice (SSRS) (SD.643.00). Available options are:

- In Progress
- Review
- Rejected
- Approved
- Completed (Note: Invoice Handling set to Completed should not be changed to any other value.)
- Hold

Note: You can use the copy and paste feature to perform a mass update to this field.

When you click Update, a validation is performed on all service calls marked with Invoice Handling set to Approved. An invoice is updated to Approved only if:

- The invoice has at least one detail line.
- The Handling value on Service Call Entry (SD.200.00) for the service call is not set to Quote.
- The revenue account and subaccount combination is valid for each detail line in the invoice.
- The Cost of Goods Sold account and subaccount combination is valid for each detail line in the invoice.
- The tax IDs for the invoice are valid and the tax total for the invoice is the sum of the detail tax by tax ID.
- Invoice Date is not blank.

Technician

Technician contains the employee ID of the primary technician assigned to the service call.

Call Type

Call Type contains the call type identifier of the service call.

Amount

Amount contains the total amount of the invoice, including labor, material, and taxes.

Salesperson ID

Salesperson ID contains the salesperson identifier of the service call.

Branch ID

Branch ID contains the branch identifier of the service call.

Select All (button)

Clicking Select All causes Selected to be marked for all service calls in the grid.

Unselect All (button)

Clicking Unselect All causes Selected to be cleared for all service calls in the grid.
Detail (button)
Clicking Detail causes Invoice Entry (SD.202.00) to open for the highlighted service call in the grid. Information on Invoice Entry (SD.202.00) can be edited and all the tabs and buttons on the screen function. Click Details on Invoice Entry (SD.202.00) to access the supporting invoice details screen.

Invoice Notes (button)
Clicking Invoice Notes causes Invoice - Notes Entry (SD.408.00) to open for the highlighted service call in the grid. The invoice note can be edited. For more information, see “Invoice – Notes Entry (SD.408.00)” on page 458.

Update (button)
Clicking Update causes the changes made in the grid to be applied to those service calls with the Selected check box marked.
Invoice – Notes Entry (SD.408.00)

Invoice – Notes Entry (SD.408.00) opens if you select a service call in Service Call Invoice Approval (SD.204.00) and then click Invoice Notes. Use this screen to view, enter, edit, or delete notes for the invoice you selected in Service Call Invoice Approval (SD.204.00). You can select a notes template to view and edit a standard note.

![Invoice – Notes Entry (SD.408.00)](image)

Figure 213: Invoice – Notes Entry (SD.408.00)

Following are the field descriptions for Invoice – Notes Entry (SD.408.00).

**Service Call ID**

Service Call ID displays the identification code assigned to the service call you selected in Service Call Invoice Approval (SD.204.00).

**Template ID**

In Template ID, you can select a notes design template that contains a standard message created in Notes Template (SD.410.00). Template text appears in the note text area.

**Note Text Area**

Use the note text to view or edit template text. If you do not use a note template, you can enter and edit notes in this area.

**Delete Note (button)**

Click Delete Note to remove the note.
Generate Payroll Process (SD.302.00)

Generate Payroll Process (SD.302.00) integrates technician hours and hourly pay rate information with the Payroll module. The work hours entered during invoice entry, including employee ID, earnings type, work location and rate, are processed based on the service call ID by service date range. Processing technician pay to payroll does not close the service call. The posting to Payroll creates the offset debit entry to the Accrued Wages Payable account.

![Generate Payroll Process (SD.302.00) Image]

Figure 214: Generate Payroll Process (SD.302.00)

Following are the field descriptions for Generate Payroll Process (SD.302.00).

**All Branches/Branch ID**

All Branches/Branch ID processes payroll records for service calls for all branches or for a specific branch.

**Svc Call ID From/To**

Svc Call ID From/To selects a range of service calls to include when generating payroll processing.

**Tran Date From/To**

Tran Date From/To is a payroll period date range. Records included in this date range are those records where the Service Date in Invoice - T & M Details (SD.203.00) and/or Flat Rate Order - Modify Details (SP.202.00) falls within the selected date range.

**Begin Processing (button)**

Begin Processing creates the timesheet in Payroll Time and Dollar (02.020.00).

**Cancel (button)**

Cancel prompts you to save your changes and closes the screen.

**Note:** The functionality of this process requires the user to set up inventory items with default settings for the inventory account and subaccount as Wages Payable. It is recommended that you use Customization Manager to change the label in Inventory Items (10.250.00), GL Accounts tab to Invt/Wages Acct.
Generate Inventory (SD.306.00)

Generate Inventory (SD.306.00) generates an issues batch in Inventory, creates purchase orders, and creates receipts without completing the service call.

![Generate Inventory (SD.306.00)](image)

Following are the field descriptions for Generate Inventory (SD.306.00).

**All Branches/Branch ID**

If you select All Branches, the system does not exclude generating the inventory costs, purchase orders, or receipts on invoices for any particular branch. However, if you do not select All Branches, the system requires a specific branch ID and processes only transactions for the selected branch.

**All Service Calls/Beginning/Ending Call ID**

If you select All Service Calls, the system does not exclude generating the inventory costs, purchase orders, or receipts on invoices for any particular service call. However, if you do not select All Service Calls, the system requires a range of service call IDs and processes only transactions for the selected calls.

**All Service Dates/Process Through**

If you select All Service Dates, the system does not exclude generating the inventory costs, purchase orders, or receipts on invoices based on dates. The “Service Date” is the date held in Invoice - T & M Details (SD.203.00) or Flat Rate Order - Details (SP.202.00). If you do not select All Service Dates, the system processes only those transactions up to the date entered in this screen.

**Book Inventory Costs**

If you select Book Inventory Costs, the system creates a balanced batch in Inventory, viewable in Issues (10.020.00). The system uses the Worked Hours for labor detail lines and Quantity for material detail lines entered in Invoice Entry (SD.202.00) to update the quantities on hand in Inventory. Labor items should be a non-stock item with Verify Quantities disabled on Inventory Items (10.250.00). The COGS account and subaccount are from Invoice Entry (SD.202.00), and the Inventory account and subaccount are from Inventory Items (10.250.00). For labor items, a Wages Payable account and subaccount should be entered instead of an Inventory account in Inventory.
Create Purchase Orders
If you select Create Purchase Orders, the system creates a purchase order where a vendor ID is populated in the detail line record of Invoice Entry (SD.202.00), Invoice - T & M Details (SD.203.00), or Flat Rate Order - Modify Details (SP.202.00). If the same vendor ID is entered two or more times, the system generates only one purchase order for the vendor with multiple detail lines. However, if two or more vendor IDs are entered, the system creates a purchase order for each vendor. The system uses Qty Purch in Invoice - T & M Details (SD.203.00).

Create P.O. Receipts
If you select Create P.O. Receipts, the system creates a purchase order and receipt. The receipts must be reviewed prior to posting to Inventory and creating an AP voucher.

Include Service Calls Having Blank Period to Post
Specify the period to post for the service calls you wish to process. Service calls with a blank period to post will not be processed unless Include Service Calls having blank period to post is checked.

Begin Processing (button)
Begin Processing posts the transactions to Inventory and Accounts Receivable unless the Handling option of Delete All Invoices is selected.

Cancel (button)
Cancel prompts you to save your changes and closes the screen.
Service Invoice Printing - Keep/Delete (SD.642.00)

After invoices have printed, Service Invoice Printing - Keep/Delete (SD.642.00) is displayed. Confirm that all invoices have printed successfully prior to proceeding, unless the invoices are manual invoices. When all invoices have been printed, select Keep All Invoices and click Begin Processing. The system creates a batch in Inventory for updating quantities on hand, quantities available, quantities allocated, and cost of goods sold. In addition, a batch is created in Accounts Receivable for recognizing revenue and any applicable taxes.

To terminate the invoice process, preventing any records from posting, select the Handling option Delete All Invoices.

![Figure 216: Service Invoice Printing - Keep/Delete (SD.642.00)](image)

Following are the field descriptions for Service Invoice Printing - Keep/Delete (SD.642.00).

**Batch Number**

Batch Number displays the current batch you are processing.

**Handling**

Handling has two options. Keep All Invoices indicates the batch is processed. Delete All Invoices deletes the batch. These invoices may also be processed at another time.

**Begin Processing (button)**

Begin Processing posts the transactions to Inventory and Accounts Receivable unless the Handling option of Delete All Invoices is selected.
Technicians Page (SD.903.00)

Following are the field definitions for the Technicians Page (SD.903.00).

**Service Call ID**
Service Call ID contains the service call identifier.

**Call Status ID**
Call Status ID contains the status assigned to the service call when the page is sent.

*Note:* The status of a problem code task is not changed by sending a page.

**Selected**
Selected indicates that a page should be sent to the technician.

**Technician ID**
Technician ID contains the employee ID from Employee Maintenance (SD.007.00) of the technician being paged.

**Number**
Number contains the pager or PIN to be used to page the technician. The Pager/PIN defaults from Employee Maintenance (SD.007.00) and cannot be edited in Technicians Page (SD.903.00).

**Template ID**
Template ID contains the ID of the paging template to be used when paging the technician. Paging templates are created and maintained in Pager Template (SD.031.00). This is a required field.

**Create Msg (button)**
Clicking Create Msg causes the system to format the message in the message box based on the Template ID. This is useful if you have modified the default message and then want to discard your changes and return to the default format.
Auto-Retry

Auto-Retry indicates that the system should continue to try and send the page if previous attempts have failed.

Page (button)

Clicking Page causes the system to format the page message into a text file saved in the folder identified in Service Series Setup Maintenance (SD.000.00).
Setup Screens

Setup Screens Overview

*Service Series Setup Maintenance* (SD.000.00) is the first screen you should complete when setting up the service management system.

**Service Series Setup Maintenance (SD.000.00)**

*Service Series Setup Maintenance* (SD.000.00) sets the organization’s regular business hours, the service call lead time, and the service call range time. Sequencing of key identifier codes is also accomplished using *Service Series Setup Maintenance* (SD.000.00). Sequence the customer ID, the service call ID, and the service contract ID, numbering system with the former IDs in your old system. Once these key identifier codes are sequenced, you have the option to have the system automatically assign IDs to customers, service calls, and service contracts. If the **Auto-Number Branch Prefix** check box and the auto-numbering feature for the customer ID, service contracts ID, and service call ID are selected, the corresponding beginning of the unique identifying codes are masked with the appropriate three-character branch abbreviation.

The PO number option determines whether purchase order numbers in call completion are assigned automatically or manually. The non-billable cost options determine whether costs for non-billable lines are calculated in the profitability of service calls. In addition, you can select the type of paging service being used. (If you are using a paging service not included in the drop-down list, please contact your Microsoft Certified Partner.)

In **User Configuration**, assign a default call queue configuration for each user ID. When you open the dispatch board, this defaulted code allows each user to view the queues in the most desired and useful way. This screen also allows you to be associated with a particular branch.
In **Pager Configuration**, create an unlimited amount of pager templates. This is accomplished by assigning a unique ID to a template and selecting the desired fields to be linked to a template. You may select from a number of predefined fields to be attached to a template. This screen also allows you to enter the necessary modem and paging information needed to use the pager functionality in the software. Consult your local pager service for the correct settings.

![Figure 218: Service Series Setup Maintenance (SD.000.00)](image)

Following are the field descriptions for **Service Series Setup Maintenance (SD.000.00)**.

**Hours of Operation**

**Hours of Operation** sets the service hours for the organization. This information may be modified at any time. If a service call is entered after the indicated business hours, the system defaults the promised time to the beginning of the next business day. If the service call is entered before the indicated closing time but the specified lead time creates a promised time after business hours, the system again defaults the promised time to the beginning of the next business day.

**Service Call Lead Time**

**Service Call Lead Time** assigns a promised time from and a promised time to for a new service call. The promised time from is calculated by adding the service call lead time to the system time.

**Service Call Range Time**

**Service Call Range Time** adds service call range time to the service call lead time to calculate the promised time.
Auto-Number Branch Prefix (check box)

Auto-Number Branch Prefix adds a corresponding branch abbreviation to the first three characters of the customer ID, service call ID, and service contract ID. The branch prefix default is based on the branch ID linked with the associated record in each respective screen: Service Call Entry (SD.200.00), including the New Customer tab, and Service Contract Entry (SN.001.00).

PO Number Option

PO Number Option provides two options for purchase order numbers when completing a service call: Manual and Automatic. The Manual option allows you to enter a user-specified purchase order during invoice entry. If the Manual option is selected, the Auto Numbering PO and Receipt should be disabled in PO Setup (04.950.00). If the Automatic option is selected, the system automatically assigns a purchase order number for each purchase order.

Create Receipts On Purchase Orders

Create Receipts On Purchase Orders permits the selection of whether to create a receipt when creating a purchase order from Invoice Entry (SD.202.00). If Create Receipts on Purchase Orders is set to Yes, a receipt is created when entering and releasing a purchase order from Invoice Entry (SD.202.00). A receipt is not created if Create Receipts on Purchase Orders is set to No.

Include Non-Billable Labor in Costs (check box)

Include Non-Billable Labor in Cost permits the selection of whether non-billable labor items are calculated in the profitability and gross margin of service calls. If the check box is selected, the non-billable labor items are included in the calculation.

Include Non-Billable T&M in Costs (check box)

Include Non-Billable T&M in permits the selection of whether non-billable line items other than labor are calculated in the profitability and gross margin for service calls. If the check box is selected, the non-billable items are included in the calculation.

Voucher Receipts Option

Voucher Receipts Option provides three options for generating purchase orders from Invoice Entry (SD.202.00): Always Voucher, Never Voucher, and Use Purchasing Option. The Always Voucher option creates and prepares a voucher through Accounts Payable each time a purchase order is created from Invoice Entry (SD.202.00). The Never Voucher option does not create a voucher when creating a purchase order from Invoice Entry (SD.202.00). The Use Purchasing Option looks at the PO Setup (04.950.00) when creating a purchase order from Invoice Entry (SD.202.00) and bases its functionality accordingly.

Payroll Interface

Payroll Interface is set to None if there is no requirement to link the employee in Field Service Management to a payroll system.

If the Payroll module is installed and there is a requirement to capture work hours in Service Dispatch for payroll purposes and to use the Payroll hourly rate for costing, set Payroll Interface to Payroll or Advanced Payroll (depending on the module being used). With this setting, employee information can be copied from Payroll to Employee Maintenance (SD.007.00). Also, if Payroll ID in Employee Personal Information (SD.007.01) is enabled, the Generate Payroll process can exchange work hour information with the appropriate payroll module, and labor costing will be based on the pay rate in Payroll.

If a third-party payroll application is being used and you wish to link the employee in Field Service Management to the employee ID in the third-party application, set Payroll Interface to Other. This will enable Other Employee ID in Employee Personal Information (SD.007.01).
Use Pay Rate from

Use Pay Rate from controls the pay rate that is used when Generate Payroll Process (SD.302.00) is used to create timesheets in the Payroll or Advanced Payroll module. If Use Pay Rate from is Service, then the cost used on the service invoice is used as the pay rate when the Payroll or Advanced Payroll timesheet is created. If Use Pay Rate from is Payroll, then the pay rate is calculated based on the Payroll or Advanced Payroll rules applicable to that employee when the timesheet is created.

Service Type

Service Type permits the selection of the type of paging software to be used when sending alpha-pages from the service call queue. Currently, the options are Wireless Office and None (no paging enabled).

Pager ID Info

Pager ID Info defines the type of subscriber information to be used with the paging software. If Employee ID is used to page, that information must be entered in Pager No./PIN # in Employee Maintenance (SD.007.00) and must match the subscriber name on the Wireless Office server. If you page using Pager/Pin #, data must be entered in Employee Maintenance (SD.007.00) and match the subscriber name on the Wireless Office server.

Path

Path permits specifying the path or directory to store alpha-pages. Click the ellipses (…) to the right of Path to browse for the desired default path.

Last Service Call ID

Last Service Call ID permits the starting service call identifier relative to the last service call identifier to be entered from the old system, allowing continuous numbering from the old system to the new. After the initial use of the system, Last Service Call ID is used as a reference, allowing the last service call ID created to be viewed. If Auto Number Service Call is enabled, the system automatically increments this number.

Auto Number Service Call (check box)

Auto Number Service Call automatically assigns a service call ID once the record is saved. If the check box is cleared, the service call ID must be entered manually. If Auto-Number Branch Prefix is enabled in combination with the Auto Number Service Call check box, the appropriate prefix or abbreviation entered in Branch Maintenance (SD.001.00) is added to the service call ID when the service call is saved.

Last Customer ID

Last Customer ID enables the entering of the starting customer ID relative to the last customer ID from the old system, allowing continuous numbering from the old system to the new. The customer ID increments at the time new customers are created from the New Customer tab in Service Call Entry (SD.200.00). After the initial use of the system, Last Customer ID is used as a reference, allowing the last customer ID created to be viewed.

Auto Number Customer ID (check box)

Auto Number Customer ID automatically assigns a customer identifier when Create is clicked from the New Customer tab in Service Call Entry (SD.200.00). If the check box is cleared, the customer ID must be entered manually. If Auto-Number Branch Prefix is enabled in combination with the Auto Number Customer ID check box, the appropriate prefix or abbreviation entered in Branch Maintenance (SD.001.00) is added to the customer ID when the service call is saved.
**Split Commission Equal 100% (check box)**

**Split Commission Equal 100%** forces commissions to equal 100% (one hundred percent) of the **Total Invoice** amount, if a commission is split over two or more technicians during invoice entry. If the check box is selected, the system does not allow allocation of a partial percentage of the commission. If **Split Commission Equal 100%** is not selected, the total split of the commission can be less than or equal to 100%.

**Active Contract Notification (check box)**

**Active Contract Notification** allows active contract notification to be turned off when taking a service call in Service Call Entry (SD.200.00) where a service contract may be associated with the respective service site. If the check box is selected, the CSR is notified of any sites that have service contracts at the time when a service call is entered. If it is not selected, the contract notification message is not displayed, but a small message appears below Service Contract ID.

**Enable Open Calls Alert (check box)**

**Enable Open Calls** allows the open calls alert to be turned off when taking a service call in Service Call Entry (SD.200.00). The alert displays any open service calls for the selected company, customer, or site. If the check box is selected, the CSR is notified of any open service calls at the time a new service call is entered. If it is not selected, Open Service Call (SD.200.02) is not displayed, but the Open Calls button on Service Call Entry (SD.200.00) is activated.

**Check Technician's Skills and Licenses (check box)**

Select **Check Technician's Skills and Licenses** to be alerted if a technician who is listed in the detail area of Service Call Entry (SD.200.00) does not have the skills and licenses required for the call.

**Call Status on Completion**

**Call Status on Completion** defines the call status that is assigned when a service call is completed.

**Primary Use Option**

**Primary Use Option** provides two options for defining the primary use of the system: Service Calls and Work Orders. For field service related organizations, select Service Calls. For facility/equipment maintenance organizations, select Work Orders.

**Material Markup Price On**

**Material Markup Price On** provides six options to automatically calculate the unit price by selecting a costing method. For setting up the actual mark-up tables, see Inventory Mark-up Maintenance (SD.026.00) in Service Dispatch. The User-Specified option is most popular.

**Labor Markup Price On**

**Labor Markup Price On** provides six options to automatically calculate the unit price by selecting a costing method. For setting up the actual mark-up tables, see Inventory Mark-up Maintenance (SD.026.00) in Service Dispatch. The User-Specified option is most popular.

**Discount Account**

Specify the discount account from the G/L Chart of Accounts that corresponds to the discount amount entered on Invoice Entry (SD.202.00).

**Last Contract ID**

**Last Contract ID** enters a starting service contract identifier relative to the last contract ID in the old system, allowing continuous numbering. After the initial use of the system, **Last Contract ID** is used as a reference field which allows viewing of the last contract ID created. If **Auto Number Contract ID** is enabled, the system automatically increments the number to the next service contract ID.
Auto Number Contract ID (check box)

Auto Number Contract ID automatically assigns a service contract identifier to a service contract once it is saved. If the check box is cleared, the identifier must be entered manually. If the Auto-Number Branch Prefix check box is selected, the system generates a number with the appropriate branch abbreviation associated with the service contract.

Auto Contract Price Calculation (check box)

Auto Contract Price Calculation indicates to the system that a new service contract price is automatically created. This new service contract price is calculated by multiplying the base price with the renewal percentage.

User Configuration (button)

User Configuration button accesses User Configuration (SD.000.01). This screen provides the ability to select a default configuration code for the service call queue by user.

Pager Configuration (button)

Pager Configuration accesses Pager Template (SD.031.00).
**User Configuration (SD.000.01)**

*User Configuration* (SD.000.01) defines the default call view configuration to use when the user opens *Dispatch* (SD.201.00). Call views are defined in *Dispatch - View Maintenance* (SD.004.00). Setting up the default here saves the user time when opening the dispatch board as no input is required for *Queue ID*. Open *User Configuration* (SD.000.01) by clicking *User Configuration* in *Service Series Setup Maintenance* (SD.000.00).

![User Configuration (SD.000.01)](image)

**Figure 219: User Configuration (SD.000.01)**

Following are the field descriptions for *User Configuration* (SD.000.01).

**User ID**

*User ID* is a Microsoft Dynamics SL user login.

**Service Call Config**

*Service Call Config* selects a default call view (*Queue ID*) for *Dispatch* (SD.201.00).

**All Branch**

*All Branch* allows the login user to view service calls for all branches. If the login user can view calls only for a single branch, do not select the *All Branch* check box.

**Branch ID**

If the login user can view calls only for a single branch, enter the *Branch ID*.

**OK (button)**

*OK* closes the screen and saves any changes.
Graphical Dispatch Setup Maintenance (SD.902.00)

Use *Graphical Dispatch Setup Maintenance* (SD.902.00) to define the look, feel, and optional behaviors of the *Graphical Dispatch Board* (SD.900.00). You can also define preferences for email messages sent to customers and technicians in *Graphical Dispatch Board* (SD.900.00).

![Graphical Dispatch Setup Maintenance](image)

Figure 220: Graphical Dispatch Setup Maintenance (SD.902.00), Customer E-mail Options tab

Following are the field descriptions for *Graphical Dispatch Setup Maintenance* (SD.902.00).

**Note:** The tabs are described after this section.

**Employee Class label**

*Employee Class label* controls whether employee class labels display on *Graphical Dispatch Board* (SD.900.00). Select Yes to see the labels, No to have the labels suppressed.

**Average Travel Time**

*Average Travel Time* contains the amount of travel time you want as the default travel time on a problem code. Enter 00:00 if you do not want a default amount.

**When Assign Travel Time**

*When Assign Travel Time* allows you to designate when a default travel time, if one is entered in *Average Travel Time*, should be entered by the system. The options are:

- For all tasks: Each problem code task has *Average Travel Time* defaulted automatically.
- For first task only: *Average Travel Time* defaults only for the first problem code on each service call.
Conflicting Call Save Option

Conflicting Call Save Option allows you to control how conflicts are handled when multiple users are attempting to simultaneously update a problem code in Graphical Dispatch Board (SD.900.00). To illustrate, assume User A and User B have each selected, at the same time, the same problem code to update. How each option handles the situation is described below:

- **First Changes**: If selected, changes made by the first person to save changes are retained. For example: If User A moves the call from 9am to 8am at the same time that User B is moving the call from 9am to 10am and User A saves first, then User B’s changes are not saved. Instead, User B’s screen refreshes to display the call at 8am when the save is attempted.

- **Last Changes**: If selected, changes made by the last person to save changes are retained. For example: If User A moves the call from 9am to 8am at the same time that User B is moving the call from 9am to 10am and User A saves first, then the 9am value is saved. When User B subsequently saves changes, the call is updated to 10am. The call moves to 10am on User A’s screen the next time User A refreshes.

Bar Text

Bar Text allows you to select the text displayed on a problem code task bar in the Graphical Dispatch Board (SD.900.00) schedule pane. Available options are:

- ServiceCallID: Line ID
- FaultCodeID: Line ID (Note: The FaultCodeID is the same as the Problem Code ID)
- CallerName: Phone
- CallerName: Addr1 (Note: Addr1 is Address Line 1 from the customer site)
- Status: FaultCodeID: Line ID
- Addr1

Warning If Time Conflict

Warning If Time Conflict indicates whether a warning message appears if the user overlaps times on two service calls for the same technician.

Problem Status Color

Problem code task bars in the Graphical Dispatch Board (SD.900.00) schedule pane can be color-coded to represent the various available problem code status options. Each of these status options is listed in the lower portion of Graphical Dispatch Setup Maintenance (SD.902.00) with an ellipsis (...) button and a color display area. Click the ellipsis button to display a color selection screen. Once a color is selected it appears in the color display area. Problem code task bars in the Graphical Dispatch Board (SD.900.00) schedule pane correspond to the color selected here for each available status.

Note: Make sure that you select colors on which both black text and white text display clearly.

Technician Status Color

Task bars can be color-coded on Graphical Dispatch Board (SD.900.00) to represent technician status. Each of the possible status options is listed in the lower portion of Graphical Dispatch Setup Maintenance (SD.902.00) with an ellipsis (...) button and a color display area. Click the ellipsis (...) button to display a color selection screen. Once a color is selected it appears in the color display area. Technician status task bars in the Graphical Dispatch Board (SD.900.00) schedule pane correspond to the color selected here for each available status.

Note:

- The technician status of Training and the technician status of Shop are not active at this time.
- Make sure that you select colors on which both black text and white text display clearly.
Graphical Dispatch Setup Maintenance, Customer E-mail Options Tab

The Customer E-mail Options tab allows you to indicate whether technicians receive copies of email messages sent to customers in the Graphical Dispatch Board (SD.900.00). You can also specify the subject and body text for email messages sent to customers in the Graphical Dispatch Board (SD.900.00).

![Graphical Dispatch Setup Maintenance (SD.902.00), Customer E-mail Options tab](image)

Figure 221: Graphical Dispatch Setup Maintenance (SD.902.00), Customer E-mail Options tab

Following are the field descriptions for the Customer E-mail Options tab of Graphical Dispatch Setup Maintenance (SD.902.00).

Do not copy
Do not copy indicates technicians do not receive copies of email messages sent to customers.

Cc Technician
Cc Technician indicates technicians receive copies of email messages sent to customers. When an email message is created for a customer, Cc contains the email address of the technician assigned to the service call. The technician’s email address is specified in E-mail Address in Employee Maintenance (SD.007.00).

Bcc Technician
Bcc Technician indicates technicians receive copies of email messages sent to customers. When an email message is created for a customer, Bcc contains the email address of the technician assigned to the service call. The technician’s email address is specified in E-mail Address in Employee Maintenance (SD.007.00).
**E-mail Subject**

*E-mail Subject* is the wording that will appear in the *Subject* line of an email message sent to a customer.

You can specify the following variables within the email subject to personalize each email message:

- `<Service Call ID>`
- `<Problem Code Desc>`
- `<Promise Time>`
- `<Site ID>`
- `<Problem Code Notes>`

Each variable must begin with a less-than symbol (<) and end with a greater-than symbol (>). Also, the first letter of each word in the variable name must be capitalized and the rest of the word must be in lowercase letters.

**Example:** You enter a variable to customize the default email subject: *Service Call* `<Service Call ID>` *on* `<Promise Time>`. If the Service Call ID is ORC0000014, the Promised Date is 2/21/2008, Time From is 08:00 AM, and Time To is 10:00 AM, the email subject for the email message reads, *Service Call ORC0000014 on 2/21/2008 08:00 AM – 10:00 AM.*

**E-mail Body Text**

*E-mail Body Text* is the wording that will appear in the body of an email message sent to a customer.

You can specify the following variables within the email body text to personalize each email message:

- `<Service Call ID>`
- `<Problem Code Desc>`
- `<Promise Time>`
- `<Site ID>`
- `<Problem Code Notes>`
- `<CR>`

Each variable must begin with a less-than symbol (<) and end with a greater-than symbol (>). Also, the first letter of each word in the variable name must be capitalized and the rest of the word must be in lowercase letters.

**Example:**

You enter a variable to customize the email body text:

*A technician will investigate the* `<Problem Code Desc>`. `<CR>` *Amy* `<CR>` *Hi-Tech Headquarters.*

If the Problem Code Description is *furnace not working*, the email message reads:

*A technician will investigate the furnace not working.*

*Amy*

*Hi-Tech Headquarters*
Graphical Dispatch Setup Maintenance, Technician E-mail Options Tab

The Technician E-mail Options tab allows you to specify the subject and body text for email messages sent to technicians in the Graphical Dispatch Board (SD.900.00).

![Graphical Dispatch Setup Maintenance (SD.902.00), Technician E-mail Options tab](image)

Figure 222: Graphical Dispatch Setup Maintenance (SD.902.00), Technician E-mail Options tab

Following are the field descriptions for the Technician E-mail Options tab of Graphical Dispatch Setup Maintenance (SD.902.00).

**E-mail Subject**

**E-mail Subject** is the wording that will appear in the Subject line of an email message sent to a technician.

You can specify the following variables within the email subject to personalize each email message:

- `<Service Call ID>`
- `<Problem Code Desc>`
- `<Promise Time>`
- `<Site ID>`
- `<Problem Code Notes>`

Each variable must begin with a less-than symbol `<` and end with a greater-than symbol `>`. Also, the first letter of each word in the variable name must be capitalized and the rest of the word must be in lowercase letters.

**Example:** You enter a variable to customize the default email subject: *Service Call `<Service Call ID>` on `<Promise Time>`*. If the Service Call ID is ORC0000014, the Promised Date is 2/21/2008, Time From
is 08:00 AM, and Time To is 10:00 AM, the email subject for the email message reads, Service Call ORC0000014 on 2/21/2008 08:00 AM – 10:00 AM.

E-mail Body Text

E-mail Body Text is the wording that will appear in the body of an email message sent to a technician. You can specify the following variables within the email body text to personalize each email message:

- `<Service Call ID>`
- `<Problem Code Desc>`
- `<Promise Time>`
- `<Site ID>`
- `<Problem Code Notes>`
- `<CR>`

Each variable must begin with a less-than symbol (<) and end with a greater-than symbol (>). Also, the first letter of each word in the variable name must be capitalized and the rest of the word must be in lowercase letters. This does not apply to “ID” as this abbreviation must be fully capitalized.

Example:

You enter a variable to customize the email body text:

Look at the following problem: `<CR>`<Problem Code Desc>`<CR>`Amy.

If the Problem Code Description is furnace not working, the email message reads:

Look at the following problem:

furnace not working.

Amy
Other Screens Associated with Service Dispatch

Invoice - Flat Rate Order (SP.200.00)

*Invoice - Flat Rate Order* (SP.200.00) creates an invoice using flat rate IDs. These flat rates can consist of both materials and labor necessary for the flat rate detail. Flat rate entries are always billable to the customer; therefore, line types are not required for the detail.

![Invoice - Flat Rate Order (SP.200.00)](image)

Following are the field descriptions for *Invoice - Flat Rate Order* (SP.200.00).

**Service Call ID**

*Service Call ID* displays the service call. It is populated with the service call ID entered in *Invoice Entry* (SD.202.00).

**Customer ID**

*Customer ID* displays the customer identifier and name associated with a service call selected in *Invoice Entry* (SD.202.00).

**Site ID**

*Site ID* displays the site identifier and name associated with the service call. *Site ID* is populated by information entered in *Service Call Entry* (SD 200.00).

**Total**

*Total* calculates and displays the sum of extended price of all Flat Rate IDs.

**Flat Rate ID**

*Flat Rate ID* displays a flat rate identifier and description associated with the invoice. There may be more than one flat rate ID per invoice.
Price
Price displays the total price associated with the flat rate identifier.

Invt Loc ID
Invt Loc ID associates an inventory location with the service call (warehouse, truck, etc.). The detail quantities used decrement quantities on hand and quantities available for this inventory location.

Pricing Plan ID
Pricing Plan ID displays the pricing plan associated with the invoice. The pricing plan defaults from the site associated with the service call. The display-only field to the right allows you to view the percentage discount associated with the pricing plan ID. The pricing plan ID must be changed in order to change the percentage or discount. Pricing Plan ID is used for discounting purposes; you cannot change a percentage directly.

Extended Price
Extended Price displays the extended amount associated with the flat rate.

Task Detail (button)
Task Detail accesses the material and labor detail line items associated with the flat rate ID. The detail line items may be modified.

OK (button)
OK closes the screen and saves the entry.

Cancel (button)
Cancel prompts you to save your changes and closes the screen.
Flat Rate Order - Modify Detail (SP.202.00)

Flat Rate Order - Modify Detail (SP.202.00) allows you to view and modify the details of a flat rate without modifying the price. The flat rate created in the Flat Rate Pricing module defaults the inventory item, a description, product class, inventory location identifier, quantity, unit price, and extended price. Sales tax information also defaults, including the tax, the taxable amount, and the tax amount.

Inventory quantities for all items on the flat rate are automatically allocated in the Inventory module when the invoice is saved. This prevents the items from being over-allocated by other transactions.

Purchase orders can be generated from this screen. Entering a vendor identifier triggers the system to create a purchase order in the Purchasing module. The purchase order date defaults from the service call date. If Automatic is selected from PO Number Option in Service Series Setup Maintenance (SD.000.00), PO Nbr is disabled and the system assigns the purchase order number after the invoice process has been completed.

This screen also allows you to modify the details of a service call without modifying the price. Therefore, the variance amount, which is the difference between the extended price entered in Flat Rate Entry (SP.000.00) and the detail total, must equal 0.00. You cannot exit or save data until the total equals the extended price.

![Flat Rate Order - Modify Detail (SP.202.00)](image)

Figure 224: Flat Rate Order - Modify Detail (SP.202.00)

Following are the field descriptions for Flat Rate Order - Modify Detail (SP.202.00).

**Service Call ID**
Service Call ID displays the service call identifier associated with this invoice.

**Plan ID**
Plan ID displays the plan identifier associated with the flat rate identifier entered in Invoice - Flat Rate Order (SP.200.00).

**Flat Rate ID**
Flat Rate ID displays the flat rate identifier associated with the selected service call.
**Tax ID**

*Tax ID* contains the tax identifier associated with the service call. The tax ID defaults from the site ID.

**Sub Total**

*Sub Total* contains the **Extended Price** total for all items in the flat rate.

**Tax**

*Tax* contains the total of the tax amount fields for all the items in the flat rate.

**Total**

*Total* contains the total dollar figure for the detail. It is calculated by adding *Sub Total* and *Tax*.

**Item ID**

*Item ID* contains inventory items from the Inventory module. These inventory items are the parts and/or labor that were needed to complete a service call. If any inventory items were populated in **Flat Rate Entry** (SP.000.00), they display in **Flat Rate Order - Modify Detail** (SP.202.00). The item description displays to the right of *Item ID*.

**Materials & Labor Area**

**Detail Type**

*Detail Type* displays the classification of the current record being entered as either labor or materials. *Detail Type* populates based on *Type* in **Inventory Items** (10.250.00). *Detail Type* displays Material for any selection other than Labor.

**Class**

*Class* displays the product class associated with a specific inventory item. *Class* defaults to the product class associated with the selected inventory item. In addition, *Class* controls the commission handling of the line item record.

**Invt Loc ID**

*Invt Loc ID* associates a specific inventory location or inventory site (warehouse, truck, etc.) with the inventory item. The quantity used is reserved in Inventory when the transaction is saved. When the details are sent to the Inventory module and processed, the transaction decreases the inventory quantities on hand.

**Whse Loc**

*Whse Loc* is the warehouse location of the inventory item where the quantity on hand is reduced by the amount in *Quantity*.

**Worked Hours**

*Worked Hours* contains the number of work hours to be paid to the technician/employee and charged to the service call.

**Billed Hours**

*Billed Hours* contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal.

**Quantity**

*Quantity* displays the number of a specific inventory item used to complete a call. This figure is multiplied by the unit price to calculate the extended price for an item.
Unit Price
Unit Price displays the unit price for the line item.

Extended Price
Extended Price displays the extended price for a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden.

Employee ID
Employee ID displays the employee identifier associated with the technician. The Employee ID defaults to the technician assigned to the service call.

Earnings Type
Earnings Type displays the earnings type associated with the line item record. The default value is based on the value populated in Employee Maintenance (SD.007.00). The earnings type multiplier is included in the calculation for extended cost.

Work Location
Work Location displays the work location identifier associated with the line item record. The default value is based on the value populated in Work Location ID from Employee Maintenance (02.250.00) in the Payroll module.

Tax Exempt
Tax Exempt indicates a line item is tax exempt. The value defaults from Flat Rate Entry (SP.000.00).

Tax ID
Tax ID assigns a tax group to a line item. Tax ID defaults from Tax ID in Site Maintenance (SD.025.00). If the inventory is tax exempt, Txbl Amount is zero.

Txbl Amount
Txbl Amount contains the amount of a line item that is taxable. A taxable amount value defaults from Extended Price. If the inventory is tax exempt, Txbl Amount is zero.

Tax Amount
Tax Amount displays the amount of sales tax for this line item. This is calculated by multiplying the tax percentages associated with a tax ID or tax group by the taxable amount.

Service Date
Service Date displays the work date for the line item. The default value is based on the start date for the service call. If the start date is not available, then the default value is based on the date the service call was originally processed.

Vendor ID
Vendor ID contains the identifier used to create a purchase order for the detail line item. Vendor ID triggers the system to create a purchase order once the call has been released.

PO Date
PO Date displays the purchase order date. Once a vendor identifier is entered, PO Date contains the service call date.
Qty Purch

Qty Purch contains the quantity ordered for a specific item that was purchased on a purchase order.

Note: The quantity purchased may be different than the quantity used.

Qty Received

Qty Received displays the quantity received for use when updating Receipt/Invoice Entry (04.010.00) in the Purchasing module.

PO Nbr

PO Nbr displays the purchase order number for items acquired with a purchase order. If Manual is selected from PO Number Option in Service Series Setup Maintenance (SD.000.00), a manual purchase order number may be typed in. If the Automatic option is selected, the system populates PO Nbr after the invoice entry process.

Receipt Nbr

Receipt Nbr displays the receipt number created in the Purchasing module.

Unit Cost

Unit Cost displays the unit cost of a line item. If an inventory item is selected with a valuation method of user-specified cost, the unit cost may be typed in. If the inventory item has a valuation method other than user specified, the default cost is populated. If the detail type is labor, the unit cost is the hourly labor rate.

Ext Cost

Ext Cost displays the calculated extended cost of a line item.

Revenue Acct

Revenue Acct displays the default sales account from the inventory item.

Revenue Sub

Revenue Sub displays the subaccount for a line item. The default subaccount is based on the Use Sub from Site setting in Call Type Maintenance (SD.003.00). If Use Sub from Site is checked, the subaccount defaults from Site Maintenance (SD.025.00). If Use Sub from Site is not checked, the subaccount defaults from the call type.

COGS Acct

COGS Acct displays the default COGS account from the inventory item.

COGS Sub

COGS Sub displays the subaccount for a line item. The default subaccount is based on the Use Sub from Site setting in Call Type Maintenance (SD.003.00). If Use Sub from Site is checked, the subaccount defaults from Site Maintenance (SD.025.00). If Use Sub from Site is not checked, the subaccount defaults from the accrued liability subaccount.

Profit

Profit contains the dollar profit figure earned on a single line item.

Profit %

Profit % contains the percent of profit earned on a single line item.
Variance Amount

**Variance Amount** contains the difference between the extended price total and any price changes you have made. The variance must equal zero before you can save the record.

**Ext Price**

**Ext Price** contains the total of the flat rate.

**OK (button)**

**OK** closes the screen and saves any changes.

**Cancel (button)**

**Cancel** prompts you to save your changes and closes the screen.
Service Call Information

There are a number of Service Call Information subscreens that are accessed via screens in other modules.

Time Entry - Service Call Information (02.010.01)

T&M Detail (SD.203.00) labor records can be entered using Service Call Information (02.010.01), which can be accessed via Payroll Time Entry (02.010.00). When the Time Entry batch is released, T&M Detail (SD.203.00) records are created.

Following are field descriptions for Service Call Information (02.010.01).

Service Call ID

Service Call ID displays the service call identifier associated with the selected service call.

Line Types

Line Types selects the appropriate behavior related to the specific line item record. A selection may be made from the following line types:

- Billable: This option creates a transaction in the Accounts Receivable module.
- In-house Warranty: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The In-house Warranty option also enables you to create operation reports for analysis.
- Manufacturer’s Warranty: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The Manufacturer’s Warranty option also enables you to create operation reports for analysis.
- Non-billable: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. If a negative quantity is used, then the detail record in Issues (10.020.00) of Inventory is defined as a credit memo.
- **Project**: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a project ID be present in Time Entry (02.010.00) as well as a task ID associated with the detail line item. In addition, the same Project needs to be in the Project field of Service Call Entry (SD.200.00). Project line items sent from inventory updates the profitability of the respective project.

- **Service Contract**: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a contract ID to be present on the service call as well as a contract ID to be associated with the detail line item. Service contract line types update the Contract History Profitability table.

**Line Item ID**

*Line Item ID* indicates inventory items from the Inventory module. These inventory items are the parts and/or labor that are needed to complete a service call. An inventory item may be selected either by typing in the desired inventory item or by accessing the *Inventory Item List* and selecting the desired inventory item. The inventory description displays to the right of *Line Item ID*.

**Contract ID**

*Contract ID* displays the contract identifier associated with the selected service call.

**Equip ID**

*Equipment ID* links a piece of equipment to the line item. Equipment identifiers may be entered in any line type. If populated, costs associated with the line item record update the Equipment History table.

**Billable Hours**

*Billable Hours* contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal. *Billable Hours* is enabled for billable line types only.

**Unit Price**

*Unit Price* contains the unit price for a line item. The unit price may differ from the stock base price if any special pricing is applicable (for example, site or contract pricing, mark-up ID, etc.). *Unit Price* is enabled for billable line types only.

**Extended Price**

*Extended Price* contains the price of a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden. *Extended Price* is enabled for billable line types only.
Time and Dollar Entry, Service Call Information (02.020.01)

T&M Detail (SD.203.00) labor records can be entered using Service Call Information (02.010.01), which can be accessed via Payroll’s Time and Dollar Entry (02.020.00). When the Time and Dollar Entry batch is released, T&M Detail (SD.203.00) records are created.

Following are field definitions for Service Call Information (02.010.01).

Service Call ID

Service Call ID displays the service call identifier associated with the selected service call.

Line Types

Line Types selects the appropriate behavior related to the specific line item record. A selection may be made from the following line types:

- Billable: This option creates a transaction in the Accounts Receivable module.
- In-house Warranty: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The In-house Warranty option also enables you to create operation reports for analysis.
- Manufacturer’s Warranty: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The Manufacturer’s Warranty option also enables you to create operation reports for analysis.
- Non-billable: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. If a negative quantity is used, then the detail record in Issues (10.020.00) of Inventory is defined as a credit memo.
• Project: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a project ID be present in Time Entry (02.010.00) as well as a task ID associated with the detail line item. In addition, the same Project needs to be in the Project field of Service Call Entry (SD.200.00). Project line items sent from inventory updates the profitability of the respective project.

• Service Contract: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a contract ID to be present on the service call as well as a contract ID to be associated with the detail line item. Service contract line types update the Contract History Profitability table.

**Line Item ID**

*Line Item ID* indicates inventory items from the Inventory module. These inventory items are the parts and/or labor that are needed to complete a service call. An inventory item may be selected either by typing in the desired inventory item or by accessing the *Inventory Item List* and selecting the desired inventory item. The inventory description displays to the right of *Line Item ID*.

**Contract ID**

*Contract ID* displays the contract identifier associated with the selected service call.

**Equip ID**

*Equipment ID* links a piece of equipment to the line item. Equipment identifiers may be entered in any line type. If populated, costs associated with the line item record update the Equipment History table.

**Billable Hours**

*Billable Hours* contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal. *Billable Hours* is enabled for billable line types only.

**Unit Price**

*Unit Price* contains the unit price for a line item. The unit price may differ from the stock base price if any special pricing is applicable (for example, site or contract pricing, mark-up ID, etc.). *Unit Price* is enabled for billable line types only.

**Extended Price**

*Extended Price* contains the price of a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden. *Extended Price* is enabled for billable line types only.
Manual Check Entry, Service Call Information (02.040.01)

T&M Detail (SD.203.00) labor records can be entered using Service Call Information (02.040.01), which can be accessed via Payroll’s Manual Check Entry (02.010.00). When the Time Entry batch is released, T&M Detail (SD.203.00) records are created.

Following are field definitions for Service Call Information (02.040.01).

Service Call ID

Service Call ID displays the service call identifier associated with the selected service call.

Line Types

Line Types selects the appropriate behavior related to the specific line item record. A selection may be made from the following line types:

- **Billable**: This option creates a transaction in the Accounts Receivable module.
- **In-house Warranty**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The In-house Warranty option also enables you to create operation reports for analysis.
- **Manufacturer’s Warranty**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The Manufacturer’s Warranty option also enables you to create operation reports for analysis.
- **Non-billable**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. If a negative quantity is used, then the detail record in Issues (10.020.00) of Inventory is defined as a credit memo.
• Project: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a project ID be present in Time Entry (02.010.00) as well as a task ID associated with the detail line item. In addition, the same Project needs to be in the Project field of Service Call Entry (SD.200.00). Project line items sent from inventory updates the profitability of the respective project.

• Service Contract: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a contract ID to be present on the service call as well as a contract ID to be associated with the detail line item. Service contract line types update the Contract History Profitability table.

Line Item ID

Line Item ID indicates inventory items from the Inventory module. These inventory items are the parts and/or labor that are needed to complete a service call. An inventory item may be selected either by typing in the desired inventory item or by accessing the Inventory Item List and selecting the desired inventory item. The inventory description displays to the right of Line Item ID.

Contract ID

Contract ID displays the contract identifier associated with the selected service call.

Equip ID

Equipment ID links a piece of equipment to the line item. Equipment identifiers may be entered in any line type. If populated, costs associated with the line item record update the Equipment History table.

Billable Hours

Billable Hours contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal. Billable Hours is enabled for billable line types only.

Unit Price

Unit Price contains the unit price for a line item. The unit price may differ from the stock base price if any special pricing is applicable (for example, site or contract pricing, mark-up ID, etc.). Unit Price is enabled for billable line types only.

Extended Price

Extended Price contains the price of a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden. Extended Price is enabled for billable line types only.
**Net Check Entry - Service Call Information (02.080.02)**

T&M Detail (SD.203.00) labor records can be entered using Service Call Information (02.080.02), which can be accessed via Payroll’s Net Check Entry (02.080.00). When the Time Entry batch is released, T&M Detail (SD.203.00) records are created.

![Service Call Information (02.080.02)](image)

**Figure 228: Service Call Information (02.080.02)**

Following are field definitions for Service Call Information (02.080.01).

**Service Call ID**

Service Call ID displays the service call identifier associated with the selected service call.

**Line Types**

Line Types selects the appropriate behavior related to the specific line item record. A selection may be made from the following line types:

- **Billable**: This option creates a transaction in the Accounts Receivable module.
- **In-house Warranty**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The In-house Warranty option also enables you to create operation reports for analysis.
- **Manufacturer’s Warranty**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The Manufacturer’s Warranty option also enables you to create operation reports for analysis.
- **Non-billable**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. If a negative quantity is used, then the detail record in Issues (10.020.00) of Inventory is defined as a credit memo.
- **Project**: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a project ID be present in Time Entry (02.010.00) as well as a task ID associated with the detail line item. In addition, the same Project needs to be in the Project field of Service Call Entry (SD.200.00). Project line items sent from inventory updates the profitability of the respective project.
• Service Contract: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a contract ID to be present on the service call as well as a contract ID to be associated with the detail line item. Service contract line types update the Contract History Profitability table.

Line Item ID
Line Item ID indicates inventory items from the Inventory module. These inventory items are the parts and/or labor that are needed to complete a service call. An inventory item may be selected either by typing in the desired inventory item or by accessing the Inventory Item List and selecting the desired inventory item. The inventory description displays to the right of Line Item ID.

Contract ID
Contract ID displays the contract identifier associated with the selected service call.

Equip ID
Equipment ID links a piece of equipment to the line item. Equipment identifiers may be entered in any line type. If populated, costs associated with the line item record update the Equipment History table.

Billable Hours
Billable Hours contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal. Billable Hours is enabled for billable line types only.

Unit Price
Unit Price contains the unit price for a line item. The unit price may differ from the stock base price if any special pricing is applicable (for example, site or contract pricing, mark-up ID, etc.). Unit Price is enabled for billable line types only.

Extended Price
Extended Price contains the price of a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden. Extended Price is enabled for billable line types only.
Advanced Timesheet Entry, Service Call Information (58.010.01)

T&M Detail (SD.203.00) labor records can be entered using Service Call Information (58.010.01), which can be accessed by clicking Service Call Info on Advanced Payroll’s Advanced Timesheet Entry (50.010.00). When the time entry batch is released, T&M Detail (SD.203.00) records are created.

Note: The Service Call Info button appears if Payroll Interface in Service Series Setup Maintenance (SD.200.00) is set to Adv Payroll.

![Figure 229: Service Call Information (58.010.01)](image)

Following are field definitions for Service Call Information (58.010.01).

**Service Call ID**

Service Call ID displays the service call identifier associated with the selected service call.

**Line Types**

Line Types selects the appropriate behavior related to the specific line item record. A selection may be made from the following line types:

- **Billable**: This option creates a transaction in the Accounts Receivable module.
- **In-house Warranty**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The In-house Warranty option also enables you to create operation reports for analysis.
- **Manufacturer’s Warranty**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. The Manufacturer’s Warranty option also enables you to create operation reports for analysis.
- **Non-billable**: This option creates a non-billable COGS transaction in Issues (10.020.00) of the Inventory module. If a negative quantity is used, then the detail record in Issues (10.020.00) of Inventory is defined as a credit memo.
• Project: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a project ID be present in Time Entry (02.010.00) as well as a task ID associated with the detail line item. In addition, the same Project needs to be in the Project field of Service Call Entry (SD.200.00). Project line items sent from inventory updates the profitability of the respective project.

• Service Contract: This option creates a COGS transaction in Issues (10.020.00) of the Inventory module. Using this line type requires a contract ID to be present on the service call as well as a contract ID to be associated with the detail line item. Service contract line types update the Contract History Profitability table.

**Line Item ID**

**Line Item ID** indicates inventory items from the Inventory module. These inventory items are the parts and/or labor that are needed to complete a service call. An inventory item may be selected either by typing in the desired inventory item or by accessing the **Inventory Item List** and selecting the desired inventory item. The inventory description displays to the right of **Line Item ID**.

**Contract ID**

**Contract ID** displays the contract identifier associated with the selected service call.

**Equip ID**

**Equipment ID** links a piece of equipment to the line item. Equipment identifiers may be entered in any line type. If populated, costs associated with the line item record update the Equipment History table.

**Billable Hours**

**Billable Hours** contains the number of billable hours to charge to the customer as revenue. The billable hours and worked hours do not have to be equal. **Billable Hours** is enabled for billable line types only.

**Unit Price**

**Unit Price** contains the unit price for a line item. The unit price may differ from the stock base price if any special pricing is applicable (for example, site or contract pricing, mark-up ID, etc.). **Unit Price** is enabled for billable line types only.

**Extended Price**

**Extended Price** contains the price of a detail line item. This value is calculated by multiplying the unit price by the quantity used. This value may be overridden. **Extended Price** is enabled for billable line types only.
Customer Maintenance (08.260.00)

Customer Maintenance (08.260.00) is an Accounts Receivable screen. Fields should be used according to normal implementation procedures for Accounts Receivable. See the Accounts Receivable online help or user guide for more information.

![Customer Maintenance (08.260.00), Customer Information tab](image)

Figure 230: Customer Maintenance (08.260.00), Customer Information tab

Following are the field descriptions for Customer Maintenance (08.260.00), Customer Information tab.

**Customer ID**

Customer ID contains the customer identifier and the customer name associated with a service call selected in Invoice Entry (SD.202.00).

**Class ID**

Class ID is a unique identifying code that distinguishes this product class from all other product classes in the database. New product classes must be defined in the Inventory module.

**Status**

Status accepts the current condition of the customer.

**Name**

Name contains the name of the customer.
Trade Discount %
Trade Discount % is any additional discount percentage, at a specific price level, that should be deducted from the customer’s document amounts at payment time.

Price Class
Price Class contains the identification code of the customer’s price class.

Terms ID
Terms ID controls the discount, due dates, and discount amount of the document and explanation of the discount percent and discount days associated with the terms ID.

History (button)
History accesses Customer History (08.261.00).

Activity (button)
Activity accesses Customer Activity (08.260.04).

Shipping Address (button)
Shipping Address accesses Shipping Address (08.262.00).

Credit Check
Credit Check contains the customer’s current credit status in the system, and is available only when the Order Management module is installed.

Limit
Limit contains the maximum amount of goods or services the customer can purchase on terms; zero specifies that the customer has unlimited credit.

Available
Available contains the amount of credit remaining.

Avg Days to Pay
Avg Days to Pay contains the number of days, on average, from the date when you invoice the customer to the date when you receive the customer’s invoice payment for the current company.

Grace Period
Grace Period contains the number of “grace” days granted to a customer with past-due payments before taking action, such as notification or assessment of finance charges. The figure must be greater than 0.

Credit Manager ID
Credit Manager ID contains the identifier of the credit manager who performed the customer credit check.

Current
Current contains the total of the customer’s Accounts Receivable documents as of the current fiscal period.

Future
Future contains the total of the customer’s Accounts Receivable documents currently entered but marked for posting to a future fiscal period.
Open Order
Open Order contains the total of the customer’s open sales orders.

Pre-Payments
Pre-Payments contains the total of all prepayments made for this customer.

Past Due
Past Due contains the total of all past-due invoices for this customer.

Last Invoice
Last Invoice contains the date of the customer’s most recent invoice.

Last Activity
Last Activity contains the date of the customer’s most recent account activity.
Reports

Advertising Media Performance Report (SD.630.00)

The Advertising Media Performance Report (SD.630.00) report allows users to view the number of service calls and total revenue associated with each media source. You can flexibly specify this report using the Media Report Performance Selection (SD.402.00) dialog box. For example, for the date range you specify, you can also specify that the report include one or all branch IDs, media group IDs, media buy IDs, and technician IDs. You can show all calls or only completed calls.

Figure 231: Media Report Performance Selection (SD.402.00) dialog box

Figure 232: Advertising Media Performance Report (SD.630.00)
Billable - Completed Calls (SD.623.00)

The Billable - Completed Calls (SD.623.00) report lists the billable service calls that have been completed for a date range. For each service call it provides the taken and the completed dates, customer name, call ID, the customer service representative (CSR) for the call, and the $ Spiff (commission the CSR receives, based on the number of calls handled. It also indicates whether the customer is an existing one (Old) or a new one.

<table>
<thead>
<tr>
<th>Date</th>
<th>Customer Name</th>
<th>Call ID</th>
<th>Old/New</th>
<th>$ Spiff</th>
<th>CSR Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/10/07</td>
<td>Denise Smith</td>
<td>CH10000001</td>
<td>Old</td>
<td>0.50</td>
<td>SYSTEM</td>
</tr>
<tr>
<td>10/10/07</td>
<td>School of Fine Art</td>
<td>LA12000002</td>
<td></td>
<td></td>
<td>SYSTEM</td>
</tr>
<tr>
<td>10/10/07</td>
<td>School of Fine Art</td>
<td>LA12000003</td>
<td></td>
<td></td>
<td>SYSTEM</td>
</tr>
</tbody>
</table>

Sub Total: SYSTEM - 3 Calls

Totals: 3 Calls

0.50

Figure 233: Billable - Completed Calls (SD.623.00) report
Branch List (SD.600.00)

The Branch List (SD.600.00) report lists the branches and information about them. For each branch it provides the branch ID, name and short name, address, attention, phone and fax numbers, and the geographic zone ID and its description.

<table>
<thead>
<tr>
<th>Branch ID</th>
<th>Name &amp; Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHICAGO</td>
<td>Chicago, IL</td>
</tr>
<tr>
<td></td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td>City</td>
</tr>
<tr>
<td></td>
<td>State</td>
</tr>
<tr>
<td>LA</td>
<td>Los Angeles County Branch</td>
</tr>
<tr>
<td></td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td>City</td>
</tr>
<tr>
<td></td>
<td>State</td>
</tr>
<tr>
<td></td>
<td>Geographic Zone ID: Description</td>
</tr>
<tr>
<td>OC</td>
<td>Orange County Branch</td>
</tr>
<tr>
<td></td>
<td>Address</td>
</tr>
<tr>
<td></td>
<td>City</td>
</tr>
<tr>
<td></td>
<td>State</td>
</tr>
<tr>
<td></td>
<td>Geographic Zone ID: Description</td>
</tr>
</tbody>
</table>

Records Printed: 3

Figure 234: Branch List (SD.600.00) report

Call Status List (SD.601.00)

The Call Status List (SD.601.00) report lists all of the valid call statuses and their descriptions, sorted by call status ID.

<table>
<thead>
<tr>
<th>Call Status ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASSIGNED</td>
<td>Assigned to Technician</td>
</tr>
<tr>
<td>CANCELLED</td>
<td>Cancelled Call</td>
</tr>
<tr>
<td>COMPLETED</td>
<td>Completed Call</td>
</tr>
<tr>
<td>HOLD</td>
<td>Calls on Hold</td>
</tr>
<tr>
<td>NEW</td>
<td>New Calls</td>
</tr>
<tr>
<td>PARTS-IN</td>
<td>Parts have Arrived for Call</td>
</tr>
<tr>
<td>PARTS-OUT</td>
<td>Waiting for Parts to arrive</td>
</tr>
<tr>
<td>WORK</td>
<td>Work in Progress</td>
</tr>
</tbody>
</table>

Records Printed: 8

Figure 235: Call Status List (SD.601.00) report
Call Type List (SD.602.00)

The Call Type List (SD.602.00) report lists all of the valid call types, and provides the subaccount and expected duration for each call type.

<table>
<thead>
<tr>
<th>Call Type ID</th>
<th>Description</th>
<th>Duration</th>
<th>Sub-Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC</td>
<td>Air Conditioning</td>
<td>Short</td>
<td>304202A000001</td>
</tr>
<tr>
<td>HEATING</td>
<td>Heating</td>
<td>Short</td>
<td>304202A000001</td>
</tr>
<tr>
<td>DURING</td>
<td>Plumbing</td>
<td>Short</td>
<td>304202A000001</td>
</tr>
<tr>
<td>PH</td>
<td>Preventative Maintenance</td>
<td>Short</td>
<td>304202A000001</td>
</tr>
</tbody>
</table>

Figure 236: Call Type List (SD.602.00) report

Customer Site Groups (SSRS) (SD.644.00)

The Customer Site Groups (SSRS) (SD.644.00) report lists all of the customer site groups and their descriptions, sorted alphabetically by customer site group ID. The report shows all customer ID and customer site ID combinations included within each customer site group ID, along with their descriptions. Customer Site Groups (SSRS) (SD.644.00) reports are created using SQL Server Reporting Services (SSRS).

Figure 237: Customer Site Groups (SSRS) (SD.644.00) report
Dwelling List (SD.603.00)

The *Dwelling List (SD.603.00)* report lists all of the valid dwellings and their descriptions, sorted alphabetically by dwelling ID.

![Dwelling List (SD.603.00) report](image)

**Employee Class List (SD.605.00)**

The *Employee Class List (SD.605.00)* report lists all of the valid employee classes, their descriptions, and whether commission is paid.

![Employee Class List (SD.605.00) report](image)
Employee Information (SD.604.00)

The Employee Information (SD.604.00) report provides detailed general and personal information for each employee.

Unmask SSN and TIN Numbers

The Social Security Number (SSN) prints with an asterisk (*) mask for each digit except the last 4 digits. For example, an SSN of 123-45-6789 is now displayed as ***-**-6789. This occurs if the user printing the report does not have access rights to the Employee Maintenance (02.250.00) screen.

Figure 240: Employee Information (SD.60.00), Report tab
If access rights exist for the user for the Employee Maintenance (02.250.00) screen, the **Unmask SSN and TIN Numbers** check box appears on the **Report** tab when the user selects the applicable format of the report. Selecting the check box lets the user print the report and display an unmasked SSN for each employee.

**Employee General Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee ID</td>
<td>AS8012KH</td>
</tr>
<tr>
<td>Employee Class</td>
<td>HELPER</td>
</tr>
<tr>
<td>Branch ID</td>
<td>1b</td>
</tr>
<tr>
<td>Active Employee</td>
<td>Yes</td>
</tr>
<tr>
<td>First Name</td>
<td>Matthew</td>
</tr>
<tr>
<td>Middle Initial</td>
<td>S</td>
</tr>
<tr>
<td>Last Name</td>
<td>Arnold</td>
</tr>
<tr>
<td>Address</td>
<td>1217 Washington Av</td>
</tr>
<tr>
<td>City</td>
<td>Boston</td>
</tr>
<tr>
<td>State</td>
<td>MA</td>
</tr>
<tr>
<td>ZIP</td>
<td>02128</td>
</tr>
<tr>
<td>S.S.N.</td>
<td>000-00-0004</td>
</tr>
<tr>
<td>Birth Date</td>
<td>01/01/40</td>
</tr>
<tr>
<td>Home Phone</td>
<td>(415) 743-2970</td>
</tr>
<tr>
<td>Work Phone</td>
<td>(415) 777-77-22 Ext 22</td>
</tr>
<tr>
<td>Template ID</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td></td>
</tr>
</tbody>
</table>

**Employee Personal Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Information</td>
<td></td>
</tr>
<tr>
<td>Date Extension $</td>
<td></td>
</tr>
<tr>
<td>Payroll ID</td>
<td>EMD0004</td>
</tr>
<tr>
<td>Workers Comp. Dept.</td>
<td>CSU124</td>
</tr>
<tr>
<td>Sex</td>
<td>Male</td>
</tr>
<tr>
<td>Matiral Status</td>
<td>Single</td>
</tr>
<tr>
<td>Exemptions</td>
<td>0</td>
</tr>
<tr>
<td>Driver’s License/vehicle Information</td>
<td></td>
</tr>
<tr>
<td>Driver License $</td>
<td>e67772425</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>01/01/99</td>
</tr>
<tr>
<td>Issuing State</td>
<td>CA</td>
</tr>
<tr>
<td>Class/Endorsements</td>
<td></td>
</tr>
<tr>
<td>Assigned Vehicle ID</td>
<td>2UV0002</td>
</tr>
<tr>
<td>Pay/Quote Information</td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td>History</td>
</tr>
<tr>
<td>Department ID</td>
<td>EQUITY</td>
</tr>
<tr>
<td>Pay Rate</td>
<td>$10.50</td>
</tr>
<tr>
<td>Date Hired</td>
<td>02/02/92</td>
</tr>
<tr>
<td>Date of Last Raise</td>
<td>02/02/92</td>
</tr>
<tr>
<td>Debt Terminated</td>
<td>01/01/00</td>
</tr>
<tr>
<td>Commission Plan ID</td>
<td></td>
</tr>
<tr>
<td>Sales Quota</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Figure 241: Employee Information (SD.604.00) report**
Geographic Zone List (SD.606.00)

The Geographic Zone List (SD.606.00) report provides sales and other information, by region and branch. For each zone (branch) listed, you can see which technician is assigned, the number of calls received, the total revenue, and the average revenue per call.

<table>
<thead>
<tr>
<th>Zone ID</th>
<th>Description</th>
<th>Assigned Tech</th>
<th>Num Of Calls</th>
<th>Total Revenue</th>
<th>Avg Rev/Call</th>
<th>Branch ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA</td>
<td>Los Angeles County, California</td>
<td></td>
<td>0</td>
<td>20.00</td>
<td>20.00</td>
<td>LA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>90744</td>
<td>Wilmington</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
<tr>
<td>90744</td>
<td>Long Beach</td>
</tr>
</tbody>
</table>

Figure 242: Geographic Zone List (SD.606.00) report

Inventory Mark-Up (SD.619.00)

The Inventory Mark-Up (SD.619.00) report lists the mark-up IDs and their descriptions and shows the mark-up break information for each mark-up ID.

<table>
<thead>
<tr>
<th>Mark Up ID &amp; Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LABOR - Labor markup</td>
</tr>
<tr>
<td>Mark Up Breaks:</td>
</tr>
<tr>
<td>0.01</td>
</tr>
<tr>
<td>Above:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MATERIAL - Material markup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark Up Breaks:</td>
</tr>
<tr>
<td>0.01</td>
</tr>
<tr>
<td>Above:</td>
</tr>
</tbody>
</table>

Figure 243: Inventory Mark-Up (SD.619.00) report
License List (SD.607.00)

The License List (SD.607.00) report provides information about each employee and business license held. You can see the license ID and description, License type, effective date, expiration date, whether the license is active, the issuing organization and description. The report also includes dollar amount charged for the initial and renewal license and gives the initial and renewal terms.

Figure 244: License List (SD.607.00) report

To see a listing of licenses by zip code, use the License By Zip Code report; see “License - Zip Code List (SD.608.00)” on page 507.

License - Zip Code List (SD.608.00)

The License - Zip Code List (SD.608.00) report associates each business and employee license with its zip code, to facilitate each branch in identifying its licensing information.

Figure 245: License - Zip Code List (SD.608.00) report
Media Group List (SD.609.00)

The Media Group List (SD.609.00) report is a listing of all of the existing media groups and their descriptions.

<table>
<thead>
<tr>
<th>Media Group ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEWSPAPER</td>
<td>Newspaper Ads</td>
</tr>
<tr>
<td>RADIO</td>
<td>Radio Ads</td>
</tr>
<tr>
<td>REPER</td>
<td>Referrals</td>
</tr>
<tr>
<td>TV</td>
<td>Television Ads</td>
</tr>
</tbody>
</table>

Figure 246: Media Group List (SD.609.00) report

Media Buy List (SD.610.00)

The Media Buy List (SD.610.00) report provides information about the marketing resources and referrals for a company. For each marketing resource it shows the media code and description, media group, budget, frequency of use, location, buy date, and coop information.

<table>
<thead>
<tr>
<th>Media Code</th>
<th>Description</th>
<th>Media Group</th>
<th>Budget</th>
<th>Freq</th>
<th>Location</th>
<th>Buy Date</th>
<th>Shops</th>
<th>Coop</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMW0122</td>
<td>Referral from another customer</td>
<td>REPER</td>
<td>0.00</td>
<td>Monthly</td>
<td>01/01/00</td>
<td>0.00</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

Coop Advertising Information:
- Vendor ID: CMW0122
- Contact: 
- Name: 
- Address: 
- City: 
- State: 
- Zip: 
- Phone Number: 
- Fax Number: 
- Share #: 0.00

<table>
<thead>
<tr>
<th>Media Code</th>
<th>Description</th>
<th>Media Group</th>
<th>Budget</th>
<th>Freq</th>
<th>Location</th>
<th>Buy Date</th>
<th>Shops</th>
<th>Coop</th>
</tr>
</thead>
<tbody>
<tr>
<td>RADIO-IA</td>
<td>Iowa Radio Ads</td>
<td>RADIO</td>
<td>5,000.00</td>
<td>Yearly</td>
<td>Ames, IA</td>
<td>12/31/06</td>
<td>0.00</td>
<td>No</td>
</tr>
</tbody>
</table>

Coop Advertising Information:
- Vendor ID: "CMW0122"
- Contact: 
- Name: Consolidated Messenger
- Address: 139 N. Main Ave.
- City: Ames
- State: IA
- Zip: 50011
- Phone Number: (866) 335-0113
- Fax Number: (866) 335-0113
- Share #: 0.00

Figure 247: Media Buy List (SD.610.00) report
Open Service Call List (SD.620.00)

The Open Service Call List (SD.620.00) report provides information about every service call that is still open. You can sort it by branch ID, call type, or service call ID. It shows the branch ID, call type, service call ID, site name, address, site phone, date and time promised, and the technician assigned to each call.

![Figure 248: Open Service Call List (SD.620.00) report](image)

Problem Code List (SD.634.00)

The Problem Code List (SD.634.00) report identifies all of the problem codes available for use in tracking service calls. For each problem code, the report identifies the problem description, number of times it has been used, and the estimated time to repair the problem code.

![Figure 249: Problem Code List (SD.634.00) report](image)

Product Class List (SD.611.00)

The Product Class List (SD.611.00) report lists all of the existing product classes. The information includes class ID, description, commission status, flat-rate markup ID, and markup description.

![Figure 250: Product Class List (SD.611.00) report](image)
Reprint Service Call Invoice (SD.650.00)

The Reprint Service Call Invoice report reprints service call invoices. A wide range of selection criteria are available on the Select tab for specifying which invoices you want.

**Note:** An invoice for a customer set up for Quick Send for the Service Call Invoice document type on Accounts Receivable Customer Maintenance (08.260.00), Quick Send tab is not printed. If the invoice has not been transmitted electronically, Quick Send requests are created according to the Quick Send preferences defined for the customer on the Accounts Receivable Customer Maintenance (08.260.00), Quick Send tab. If the invoice was transmitted electronically, the Quick Send requests indicated in the invoice’s Quick Send requests are used to resend the invoice to the initial recipients. For more information about Quick Send requests, see “Quick Send Inquiry (21.200.00)” in the Shared Information online help or user guide.

![Reprint Service Call Invoice (SD.650.00)](image)

*Figure 251: Reprint Service Invoice (SD.650.00)*
### Reprinted Service Call Invoice

**Contoso, Ltd**

**To:**
- **Customer:**
  - 610 West Main St., Suite 405
  - Chicago, IL 60676

**From:**
- **Vendor:**
  - 610 West Main St., Suite 405
  - Chicago, IL 60676

<table>
<thead>
<tr>
<th>ITEM #</th>
<th>DESCRIPTION</th>
<th>QTY</th>
<th>UNIT PRICE</th>
<th>EXT. PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>20021000</td>
<td>Residential service technician labor rate</td>
<td>6.00</td>
<td>$40.00</td>
<td>$240.00</td>
</tr>
</tbody>
</table>

**Total: $240.00**

---

**Figure 252: Service Call Invoice report - reprinted**
Sales Analysis Report (SD.626.00)

The Sales Analysis Report (SD.626.00) provides detailed information for each call type, so that sales effectiveness may be analyzed. For each call type, it shows the number of calls, hours spent, revenue, gross margin, gross margin percent, as well as the averages of all of these. Using the Sales Analysis Report (SD.404.00) dialog box, you can run the report for all branches or a single branch that you specify. You can choose whether to run the report for a particular period to post date or for the completion date.

![Figure 253: Sales Analysis Report (SD.404.00) dialog box]

![Figure 254: Sales Analysis Report (SD.626.00), Period to Post format]
Service Call Audit (SD.627.00)

The Service Call Audit (SD.627.00) report provides information about invoice details, whether billable or not billable, that have been entered on service calls. You have the following call-selection options: All Calls, Open Calls, and Completed Calls. You may choose to report on all branches, or a single branch that you specify. You also specify the date range for the report and the range of contract IDs to include.

![Service Call Audit Report (SD.406.00)](image)

**Figure 255: Service Call Audit Report (SD.406.00)**

![Service Call Audit (SD.627.00) report](image)

**Figure 256: Service Call Audit (SD.627.00) report**
Service Call History (SD.622.00)

The Service Call History (SD.622.00) report provides a listing of closed service calls sorted by customer. It includes site ID, customer ID, call ID, promise, start, and end dates, the call type, primary technician, invoice number, and invoice amount.

![Figure 257: Service Call History (SD.622.00) report](image-url)
Service Call Invoice (SD.640.00)

The Service Call Invoice (SD.640.00) report provides an invoice for one or many completed service calls.

**Note:** An invoice is not printed for a customer set up for Quick Send for the Service Call Invoice document type on the Quick Send tab in Accounts Receivable’s Customer Maintenance (08.260.00). If the invoice has not been transmitted electronically, Quick Send requests are created according to the Quick Send preferences defined for the customer on the Quick Send tab in Accounts Receivable’s Customer Maintenance (08.260.00). If the invoice was transmitted electronically, the Quick Send details indicated in the invoice’s Quick Send requests are used to resend the invoice to the initial recipients. For more information about Quick Send requests, see “Quick Send Inquiry (21.200.00)” in the Shared Information help or user guide.

![Figure 258: Service Call Invoice (SD.640.00) report](image)
Service Call Invoice, Report Tab

When you select Service Call Invoice (SD.640.00) from the Reports menu, the standard report screen displays.

![Service Call Invoice (SD.640.00), Report tab](image)

**Figure 259: Service Call Invoice (SD.640.00), Report tab**

Following are the only items to be used on Service Call Invoice (SD.640.00), Report tab.

**Print (Button)**

*Print* displays Service Invoice Selection (SD.641.00) where service call invoices can be selected to be printed to a printer or sent electronically and processed to Accounts Receivable.

**Print Preview (Button)**

*Print Preview* displays Service Invoice Selection (SD.641.00) where service call invoices can be selected to be printed to the screen and processed to Accounts Receivable.
Service Call Invoice, Options Tab

Figure 260: Service Call Invoice (SD.640.00), Options tab

Suppress zero invoices printing (check box)

Use **Suppress zero invoices printing** to allow or suppress the printing of invoices that have a total invoice amount of zero. These invoices will not be printed if the check box is selected.
Service InvoiceSelection (SD.641.00)

Open Service Invoice Selection (SD.641.00) by clicking Print or Print Preview in Service Call Invoice (SD.640.00). Service Invoice Selection (SD.641.00) processes service calls for invoicing.

![Service Invoice Selection (SD.641.00) - Hi-Tech Headquarters](image)

**Figure 261: Service Invoice Selection (SD.641.00) — Service Call Invoice document type is defined in Quick Send Setup (21.951.00)**

Following are the field descriptions for Service Invoice Selection (SD.641.00).

**Batch Nbr**
Batch Nbr is automatically assigned by the system. However, a batch number may be entered or selected from the PV list to process a previously created batch that was not completely posted.

**Period to Post**
Period to Post determines which invoices are processed. Only those invoices that have a period to post that matches the value in Period to Post are selected.

**Invoice Type**
Invoice Type defaults to All, but an option may be selected to produce a subset of the invoices.

**Detail Type**
Detail Type defaults to All, but an option may be selected to produce a subset of the invoices.

**All Branches/Branch ID**
If you select the All Branches check box, the system does not exclude generating invoices for any particular branch. However, if you do not select All Branches, the system requires a specific branch ID and only generates invoices for the selected branch.

**All Call Types/Call Type**
If you select the All Call Types check box, the system does not exclude generating invoices for any particular call type. However, if you do not select All Call Types, the system requires a specific call type and only generates invoices for the selected call type.
All Service Calls/Service Call ID
If you select the All Service Calls check box, the system does not exclude generating invoices for any particular service call. However, if you do not select All Service Calls, the system requires a specific call and only generates an invoice for that service call.

All Customers/Customer ID
If you select the All Customers check box, the system does not exclude generating invoices for any particular customer. However, if you do not select All Customers, the system requires a specific customer ID and only generates invoices for that particular customer.

All Service Sites/Site ID
If you select the All Service Sites check box, the system does not exclude generating invoices for any particular site. However, if you do not select All Service Sites, the system requires a specific site ID and only generates invoices for that particular site.

All Technicians/Technician ID
If you select the All Technicians check box, the system does not exclude generating invoices for any particular technician. However, if you do not select All Technicians, the system requires a specific technician ID and only generates invoices for that particular technician.

Continue (button)
Continue enables the system to proceed with the invoicing process.

View Selections (button)
View Selections enables the selection of specific service calls to exclude from processing. Any filters added on Service Invoice Selection (SD.641.00) reduce the number of service calls selected.

Quick Send to One-time Receiver (button)
Quick Send to One-time Receiver enables an invoice to be transmitted electronically to a recipient that is not defined as the primary recipient for the invoice’s customer on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00) or as an additional recipient for the customer on Accounts Receivable Additional Receivers (08.260.08). The Quick Send to One-time Receiver button is available when the Service Call Invoice document type is defined on Shared Information Quick Send Setup (21.951.00) and the invoice is approved. The Quick Send preferences for the recipient are defined on One-time Receiver (SD.641.03).
Service Calls Selected for Invoicing (SD.641.01)

Clicking View Selections in Service Invoice Selection (SD.641.00) causes Service Calls Selected for Invoicing (SD.641.01) to display. If you want to exclude any invoices from the invoice run, do not select the check box. Once the invoices have been reviewed, click Continue to start the invoice process.

Note: To cancel the invoice process, clear all records and click Continue. Once Service Invoice Printing - Keep/Delete (SD.642.00) is displayed, change Handling to Delete All Invoices.

Figure 262: Service Calls Selected for Invoicing (SD.641.01)

Following are the field descriptions for Service Calls Selected for Invoicing (SD.641.01).

Selected
Selected specifies whether the invoice will print when Continue is clicked.

Service Call ID
Service Call ID contains the service call identifier associated with the selected service call.

Customer ID
Customer ID contains the customer identifier and customer name associated with the service call.

Site ID
Site ID contains the site identifier and site name associated with the service call.

Work Order Nbr
Work Order Nbr contains the number assigned to the work order.

Invoice Type
Invoice Type defaults to All, but an option may be selected to produce a subset of the invoices.

Detail Type
Detail Type defaults to All, but an option may be selected to produce a subset of the invoices.

Call Date
Call Date contains the date the service call was first placed.
Completed Date
Completed Date contains the date the technician closed the service call.

Technician ID
Technician ID contains the primary technician assigned to the service call.

Continue (button)
Continue causes selected invoices to be printed.
One-time Receiver (SD.641.03)

*One-time Receiver* (SD.641.03) allows you to identify the Quick Send preferences for a recipient and transmit a selected invoice to the recipient electronically. One-time recipients are not defined as the primary recipient for the customer on the *Quick Send* tab of Accounts Receivable *Customer Maintenance* (08.260.00) or as an additional recipient for the customer defined on Accounts Receivable *Additional Receivers* (08.260.08). The Quick Send preferences for the one-time recipient are not retained for future use. A one-time recipient should be defined as an additional receiver for the customer if future invoices will be sent to the recipient.

*One-time Receiver* (SD.641.03) opens when *Quick Send to One-time Receiver* is selected on Service Invoice Selection (SD.641.00).

![Image of One-time Receiver (SD.641.03)](image)

Figure 263: One-time Receiver (SD.641.03)

Following are the field descriptions for *One-time Receiver* (SD.641.03).

**Customer ID**

*Customer ID* displays the customer identification number associated with the invoice.

**Document Type**

*Document Type* displays the kind of document associated with the invoice.

**Service Call ID**

*Service Call ID* displays the unique code assigned to the service call associated with the invoice.

**Delivery Method**

*Delivery Method* is the manner in which the electronically-transmitted invoice will be received by the one-time recipient. Delivery methods are Email and Fax. The method defaults from the Service Call Invoice document type’s *Delivery Method* on the *Quick Send* tab of Accounts Receivable *Customer Maintenance* (08.260.00). If the Service Call Invoice document type is not defined for the customer,
Reports 523

Delivery Method defaults from the Service Call Invoice document type’s Delivery Method on Shared Information Quick Send Setup (21.951.00).

Request Priority
Request Priority is the precedence assigned to the processing of the Quick Send request by Application Server. Request priorities are High, Low, and Normal. The priority defaults from the Service Call Invoice document type’s Request Priority on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Request Priority defaults from the Service Call Invoice document type’s Request Priority on Shared Information Quick Send Setup (21.951.00).

Receiver Email Address
Receiver Email Address identifies the email address of the one-time recipient to whom the invoice will be sent. The email address defaults from E-mail Address (Main Address) on the Address Info tab of Accounts Receivable Customer Maintenance (08.260.00).

Reply Email Address
Reply Email Address identifies the email address used when the one-time recipient replies to the email message containing the invoice. The email address defaults from the Service Call Invoice document type’s Reply Email Address on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Reply Email Address defaults from the Service Call Invoice document type’s Reply Email Address on Shared Information Quick Send Setup (21.951.00).

Email Attachment File Type
Email Attachment File Type specifies the format of the file to be created to hold the invoice you send to the one-time recipient. File types for documents sent electronically via email are Text, Word, Crystal Reports, Excel, Adobe Acrobat, Rich Text, XML, and Comma-separated values. File types for documents sent electronically via fax are Text, Word, Excel, and Rich Text. The file type defaults from the Service Call Invoice document type’s Email Attachment File Type on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Email Attachment File Type defaults from the Service Call Invoice document type’s Email Attachment File Type on Shared Information Quick Send Setup (21.950.00).

Fax Receiver Name
Fax Receiver Name designates the name to appear on the cover sheet accompanying the invoice faxed to the one-time recipient. The name defaults from Attention (Bill To) on the Address Info tab of Accounts Receivable Customer Maintenance (08.260.00).

Fax Prefix
Use Fax Prefix to specify a sequence of numbers, such as a country code (for example, 061 011), that must be dialed prior to the Receiver Fax Number. The fax prefix defaults from the Service Call Invoice document type’s Fax Prefix on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Fax Prefix defaults from the Service Call Invoice document type’s Fax Prefix on Shared Information Quick Send Setup (21.950.00).

Dial Area Code (check box)
If you select Dial Area Code, the first three digits of Receiver Fax Number will be dialed as the area code when the invoice is transmitted to the one-time recipient. Clear this check box if the fax phone number is a local number for which dialing the area code is not required.
Receiver Fax Number

Receiver Fax Number designates the phone number that will receive the invoice faxed to the one-time recipient. The fax number defaults from Fax/Ext (Main Address) on the Address Info tab of Accounts Receivable Customer Maintenance (08.260.00).

Fax Sender Name

Fax Sender Name specifies the name of the individual who will send the invoice to the one-time recipient. The name defaults from Fax Sender Name on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Fax Sender Name defaults from the Service Call Invoice document type’s Fax Sender Name on Shared Information Quick Send Setup (21.950.00).

Sender Fax Number

Sender Fax Number indicates the phone number that will be the source of the invoice faxed to the one-time recipient. The fax number defaults from Sender Fax Number on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Sender Fax Number defaults from the Service Call Invoice document type’s Sender Fax Number on Shared Information Quick Send Setup (21.950.00).

Include Fax Cover Sheet (check box)

Include Fax Cover Sheet indicates whether a cover sheet should precede the invoice sent to the one-time recipient. The setting defaults from the Service Call Invoice document type’s Include Fax Cover Sheet on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Include Fax Cover Sheet defaults from the Service Call Invoice document type’s Include Fax Cover Sheet on Shared Information Quick Send Setup (21.950.00). For more information about the fax cover sheet, see “Using Application Server” in the Application Server help or user guide.

Fax Response (check boxes)

Your selections in the Fax Response check boxes will appear in the Notes area of the fax cover sheet. Select one or more check boxes to indicate how you want the one-time recipient to process the fax. The Fax Response check boxes are:

- **Urgent** — Defaults from the Service Call Invoice document type’s Fax Response – Urgent setting on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Fax Response – Urgent defaults from the Service Call Invoice document type’s Fax Response – Urgent setting on Shared Information Quick Send Setup (21.950.00).

- **For Review** — Defaults from the Service Call Invoice document type’s Fax Response – For Review setting on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Fax Response – For Review defaults from the Service Call Invoice document type’s Fax Response – For Review setting on Shared Information Quick Send Setup (21.950.00).

- **Please Comment** — Defaults from the Service Call Invoice document type’s Fax Response – Please Comment setting on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Fax Response – Please Comment defaults from the Service Call Invoice document type’s Fax Response – Please Comment setting on Shared Information Quick Send Setup (21.950.00).

- **Please Reply** — Defaults from the Service Call Invoice document type’s Fax Response – Please Reply setting on the Quick Send tab of Accounts Receivable Customer Maintenance (08.260.00). If the Service Call Invoice document type is not defined for the customer, Fax Response – Please Reply defaults from the Service Call Invoice document type’s Fax Response – Please Reply setting on Shared Information Quick Send Setup (21.950.00).
• **Please Recycle**—Defaults from the Service Call Invoice document type’s **Fax Response**—**Please Recycle** setting on the **Quick Send** tab of Accounts Receivable **Customer Maintenance** (08.260.00). If the Service Call Invoice document type is not defined for the customer, **Fax Response**—**Please Recycle** defaults from the Service Call Invoice document type’s **Fax Response**—**Please Recycle** setting on Shared Information **Quick Send Setup** (21.950.00).

**Subject Text**

**Subject Text** is the wording that appears in the Subject of the email message or in the Regarding area on the fax cover sheet that accompanies the invoice sent to the one-time recipient. The text defaults from the Service Call Invoice document type’s **Subject Text** on the **Quick Send** tab of Accounts Receivable **Customer Maintenance** (08.260.00). If the Service Call Invoice document type is not defined for the customer, **Subject Text** defaults from the Service Call Invoice document type’s **Subject Text** on Shared Information **Quick Send Setup** (21.950.00).

You can specify the following variables within the subject text to personalize the email message or fax to the one-time recipient:

- `<Customer Name>`
- `<Reference Number>`
- `<Document Amount>`
- `<Company Name>`

Each variable must begin with a less-than symbol (<) and end with a greater-than symbol (>). Also, the first letter of each word in the variable name must be capitalized and the rest of each word must be in lowercase letters.

**Example:** You enter a variable to customize the default subject text: “Current invoice from `<Company Name>`”. If the company name is Contoso, Ltd, the subject text for the email message or fax cover sheet reads, “Current invoice from Contoso, Ltd”.

**Body Text**

**Body Text** is the wording that appears in the body of an email message or in the Notes area on a fax cover sheet that accompanies the invoice sent to the one-time recipient. The text defaults from the Service Call Invoice document type’s **Body Text** on the **Quick Send** tab of Accounts Receivable **Customer Maintenance** (08.260.00). If the Service Call Invoice document type is not defined for the customer, **Body Text** defaults from the Service Call Invoice document type’s **Body Text** on Shared Information **Quick Send Setup** (21.950.00).

You can specify the following variables within the body text to personalize the email message or fax to the one-time recipient:

- `<Customer Name>`
- `<Reference Number>`
- `<Document Amount>`
- `<Company Name>`

Each variable must begin with a less-than symbol (<) and end with a greater-than symbol (>). Also, the first letter of each word in the variable name must be capitalized and the rest of each word must be in lowercase letters.

**Example:** You enter a variable to personalize the body text: “Here is an invoice for `<Customer Name>`”. When you send the invoice electronically to the one-time recipient, the email message or fax cover sheet body text reads, “Here is an invoice for Kim Abercrombie” since the one-time recipient is associated with the customer, Kim Abercrombie.

**Send Request (button)**

Click **Send Request** to transmit the invoice electronically to the one-time recipient.
Cancel (button)

Click **Cancel** to close this window without recording any changes to the database, returning to **Service Invoice Selection** (SD.641.00).
Service Call Invoice (SSRS) (SD.643.00)

Service Call Invoice (SSRS) (SD.643.00) reports are created using SQL Server Reporting Services (SSRS). However, the report generation steps do not differ from what you experience with Service Call Invoice (SD.640.00).

You can print invoices for one or several completed service calls. When you click Print or Print Preview, Service Invoice Selection (SD.641.00) appears, providing several print options. For more information about Service Invoice Selection (SD.641.00), see “Service Invoice Selection (SD.641.00)” on page 518.

Note: An invoice for a customer set up for Quick Send for the Service Call Invoice document type on Accounts Receivable Customer Maintenance (08.260.00), Quick Send tab is not printed. If the invoice has not been transmitted electronically, Quick Send requests are created according to the Quick Send preferences defined for the customer on the Accounts Receivable Customer Maintenance (08.260.00), Quick Send tab. If the invoice was transmitted electronically, the Quick Send requests indicated in the invoice’s Quick Send requests are used to resend to the invoice to the initial recipients. For more information about Quick Send requests, see “Quick Send Inquiry (21.200.00)” in the Shared Information help or user guide.

Figure 264: Service Call Invoice (SSRS) (SD.643.00)
**Service Call Invoice (SSRS), Report Tab**

When you select *Service Call Invoice (SSRS)* (SD.643.00) from the Reports menu, the standard report screen displays.

Following are the only items to be used on *Service Call Invoice (SSRS)* (SD.643.00), **Report** tab.

**Print (Button)**

*Print* displays *Service Invoice Selection* (SD.641.00) where service call invoices can be selected to be printed to a printer or sent electronically and processed to Accounts Receivable.

**Print Preview (Button)**

*Print Preview* displays *Service Invoice Selection* (SD.641.00) where service call invoices can be selected to be printed to the screen and processed to Accounts Receivable.
Service Call Invoice (SSRS), Options Tab

![Service Call Invoice (SSRS) (SD.643.00), Options tab]

**Figure 266: Service Call Invoice (SSRS) (SD.643.00), Options tab**

**Suppress zero invoices printing (check box)**

Use **Suppress zero invoices printing** to allow or suppress the printing of invoices that have a total invoice amount of zero. These invoices will not be printed if the check box is selected.
Service Call Workorder (SD.625.00)

The Service Call Workorder (SD.625.00) report contains the order for the work the technician receives and refers to a work order. For more information, see “Printing Service Call Work Orders” on page 207.

Service Location Code List (SD.621.00)

The Service Location Code List (SD.621.00) report lists all of the service location codes and provides their descriptions and their pricing percent factors. Service Location Codes are created in Equipment Location Maintenance (SE.004.00). For more information, see the Equipment Maintenance user’s guide or help.
Site List (SD.612.00)

The Site List (SD.612.00) report provides information about each customer’s sites. For each customer and each customer site, it includes the date created, map page and coordinates, the maximum service amount, whether there is authorization to call, and media ID. Detailed site, service call, and default information is also provided.

Skills List (SD.613.00)

The Skills List (SD.613.00) report identifies each skill, by skill ID, and includes a description and the labor cost of each skill.
Special Pricing (SSRS) (SD.645.00)

The Special Pricing (SSRS) (SD.645.00) report lists special pricing information as set up in Site – Special Pricing Maintenance (SD.037.00). The report is sorted by customer ID, customer site ID, and then inventory ID. The report includes the start date and end dates, price type (amount or discount %), price/disc%, revised start and end dates, revised price/disc%, and their descriptions. Special Pricing (SSRS) (SD.645.00) reports are created using SQL Server Reporting Services (SSRS).

Figure 271: Special Pricing (SSRS) (SD.645.00) report
T&M Quote (SD.633.00)

The T&M Quote (SD.633.00) report automatically produces a time and materials quote from the quotation information entered into Service Dispatch.

03/19/03

Service Series is pleased for the opportunity to make the following estimate at your

Price Estimate:

This estimate includes all material, equipment, and labor needed to complete the job. Any delays at no fault of Service Series will be charged at time and material rates. If you have any questions or if I can be of further assistance, please feel free to call me at (###) ###-####.

Best Regards,

Technical Sales

Figure 272: T&M Quote (SD.633.00) report
Timesheet Report (SD.400.00)

Use Timesheet Report (SD.400.00) to produce the Time Sheet and Invoice Report (SD.624.00). The report is available in three formats. The standard and summary reports list time technicians logged, as well as information about the associated service calls, invoices, and the resulting profit margin. The earnings summary report format includes earnings type and description, along with regular, premium, and billable hours.

After selecting one or all of the report formats, you then specify a beginning and ending date range for the reporting period. You can report on all branches or a single branch. You can also select Print Preview to check your reports before printing them.

![Timesheet Report (SD.400.00)](image1)

**Figure 273: Timesheet Report (SD.400.00)**

![Time & Invoice Report (SD.624.00), standard format](image2)

**Figure 274: Time & Invoice Report (SD.624.00), standard format**
Time & Invoice Report

Figure 275: Time and Invoice Report (SD.624.00), summary format

Figure 276: Time & Invoice Report (SD.624.00), earnings summary format
Tool List (SD.614.00)

The Tool List (SD.614.00) report provides the Tool ID and description of each tool, with related vehicle information. It shows the VIN/Serial #, make, model, year, purchase date, condition and date when the condition was last recorded, the location type and ID, the ID of the employee who has the tool, and the usage ID. For more about the information shown on this report, see “Tool Maintenance (SD.018.00)” on page 416.

<table>
<thead>
<tr>
<th>Tool ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PIPES</td>
<td>Pipe wrench, standard, 24&quot;</td>
</tr>
<tr>
<td>VIN/Serial #:</td>
<td></td>
</tr>
<tr>
<td>Make:</td>
<td>Condition: Good</td>
</tr>
</tbody>
</table>
| Model: | | Employee ID: 031002 | AMV-160 
| Year: | | Usage ID: | 090101 |
| | | Employee who has the tool |

| VVIS-K | Tin snip, right hand |
| VIN/Serial #: |  | Purchased: 08/24/07 | Location Type: Employee |
| Make: | Condition: Good | Location ID: |
| Model: | | Employee ID: 004002 | MAAV-160 
| Year: | | Usage ID: | 090101 |
| | | Employee who has the tool |

| VVIS-N | Voltage tester, non-contact |
| VIN/Serial #: |  | Purchased: 10/08/07 | Location Type: Employee |
| Make: | Condition: Good | Location ID: |
| Model: | | Employee ID: 004002 | MAAV-160 
| Year: | | Usage ID: | 090101 |
| | | Employee who has the tool |

| VVIS-G | Welding helmet, black glasses |
| VIN/Serial #: |  | Purchased: 06/19/07 | Location Type: Employee |
| Make: | Condition: Good | Location ID: |
| Model: | | Employee ID: 031002 | AMV-160 
| Year: | | Usage ID: | 090101 |
| | | Employee who has the tool |

Figure 277: Tool List (SD.614.00) report

Tool Usage List (SD.615.00)

The Tool Usage List (SD.615.00) report lists tool usage IDs and their descriptions.

<table>
<thead>
<tr>
<th>Usage ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPL</td>
<td>Employee has the tool</td>
</tr>
<tr>
<td>SHED</td>
<td>Tool is not checked out</td>
</tr>
</tbody>
</table>

Figure 278: Tool Usage List (SD.615.00) report
Usage Code List (SD.616.00)

The Usage Code List (SD.616.00) report lists the user-defined usage codes that specify usage-based (versus calendar-based) preventative maintenance intervals for equipment. Usage codes are entered into Usage Code Maintenance (SE.009.00) and associated with a manufacturer’s model in Manufacturer/Model Maintenance (SE.006.00), both in the Equipment Maintenance module.

<table>
<thead>
<tr>
<th>Interval Code</th>
<th>Description</th>
<th>Schedule Tolerance</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLICKS</td>
<td>Number of clicks</td>
<td>0.00</td>
</tr>
<tr>
<td>HOURS</td>
<td>Number of hours</td>
<td>0.00</td>
</tr>
<tr>
<td>OIL3560</td>
<td>Oil change - 3500 miles</td>
<td>1,500.00</td>
</tr>
<tr>
<td>OIL5000</td>
<td>Oil change - 5000 miles</td>
<td>1,000.00</td>
</tr>
<tr>
<td>OIL7500</td>
<td>Oil change - 7500 miles</td>
<td>8.00</td>
</tr>
</tbody>
</table>

Figure 279: Usage Code List (SD.616.00) report

Use Taxes List (SD.628.00)

The Use Taxes List (SD.628.00) groups information by tax ID, gives the details about each taxable and non-taxable service call.

<table>
<thead>
<tr>
<th>Tax ID</th>
<th>Description</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILJ98684</td>
<td>State of Illinois</td>
<td>0.09</td>
</tr>
</tbody>
</table>

Figure 280: Use Taxes List (SD.628.00)
Vehicle List (SD.617.00)

The Vehicle List (SD.617.00) report provides information for each vehicle, by Vehicle ID. It shows the vehicle description, VIN, make, model, year, date purchased, inventory location, odometer reading and reading date, and the employee ID of the employee assigned to the vehicle.

<table>
<thead>
<tr>
<th>Vehicle ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIN</td>
<td>Make</td>
</tr>
<tr>
<td>Year</td>
<td>Date Purchased</td>
</tr>
<tr>
<td>Inventory Location</td>
<td>Los Angeles</td>
</tr>
<tr>
<td>Odometer</td>
<td>Employee ID</td>
</tr>
</tbody>
</table>

Figure 281: Vehicle List (SD.617.00) report

Zip Code List (SD.618.00)

The Zip Code List (SD.618.00) report provides location and map information for each zip code. Within each zip code, the report lists employee or business licenses (based on the report format you select) and their descriptions.

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>Location Information</th>
<th>Map Page</th>
<th>Coordinates</th>
</tr>
</thead>
<tbody>
<tr>
<td>64160 - May Village</td>
<td>City: May Village</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>County: Clay County</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>State: OK</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

License ID & Description

<table>
<thead>
<tr>
<th>License ID &amp; Description</th>
<th>Active</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business License</td>
<td>Yes</td>
<td>07/31/05</td>
</tr>
</tbody>
</table>

Figure 282: Zip Code List (SD.618.00) report, Business License format

Report Tab

Report Format

Specifies the type of report to print. The options are:

- **Zip Code – Employee License** — Prints a list of zip codes that are associated with licenses that may be held by your company’s service technicians.
- **Zip Code – Business License** — Prints a list of zip codes that are associated with your company’s business licenses. Information that will assist you with planning for license renewals is included.
- **Zip Code** — Prints a list of zip codes that are associated with your business’s telephone contacts.
Adding Field Service Management information to product classes  414  
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Approving service call invoices  285  
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  earnings types  423  
  employee classes  386  
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  inventory markup IDs  432  
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  new invoice  220  
  notes template for service calls  448  
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