![Acumatica - The Cloud ERP]

ENHANCED SALES ORDER LINK TO SERVICE ORDERS

The Enhanced Sales Order Link to Service Orders provides the ability to create service orders and appointments directly from the sales order entry for order lines entered for model equipment or service type lines for selected technicians. Skill set, license requirements, and technician's availability information is displayed during the technician assignment step. This enhancement also provides the ability to generate appointments for sales order delivery, and delivery and pickup appointments for rental transactions.

ENTER TECH SCHEDULING INFO FOR EACH LINE

- **Select Technicians for Each Line on the Sales Order Details Grid.** Ability to view available technicians with required license and skill set. Select one or multiple technicians for each line.
- **Set Staring and Ending Dates for Order Lines.** Ability to set desired schedule dates for sales order line. Information entered is used to create appointments using Create Service and Appointment action on the sales order form.

CREATE SERVICE ORDER AND APPOINTMENTS

- **Create one or Multiple Appointments.** Create one or multiple service order and appointments based on selected checkboxes for each order line. Ability to enter starting and ending date and time for each sales order line.

ACCESS TO CALENDAR BOARD FROM SALES ORDERS

- **Display Calendar Board for Created Service Orders and Appointments.** Ability to access the calendar board directly from sales orders after creation of the service orders and appointments to make final adjustments to time and dates after reviewing other transactions on the calendar board.


KEY BENEFITS

STREAMLINE GENERATION OF SERVICE ORDERS AND APPOINTEMENTS

- Ability to create service orders and appointments directly from sales order entry using the added Create Service and Appointment action.

- Option to prevent the creation of Services transactions, or to warn the user if the selected technician is not available on selected days or doesn't have the skill set and license required for the work.

- The option to create repeating appointments based on set frequency.

ACCESS CALENDAR BOARD DIRECTLY FROM SALES ORDER

- Ability to access the Calendar Board directly from the sales order.
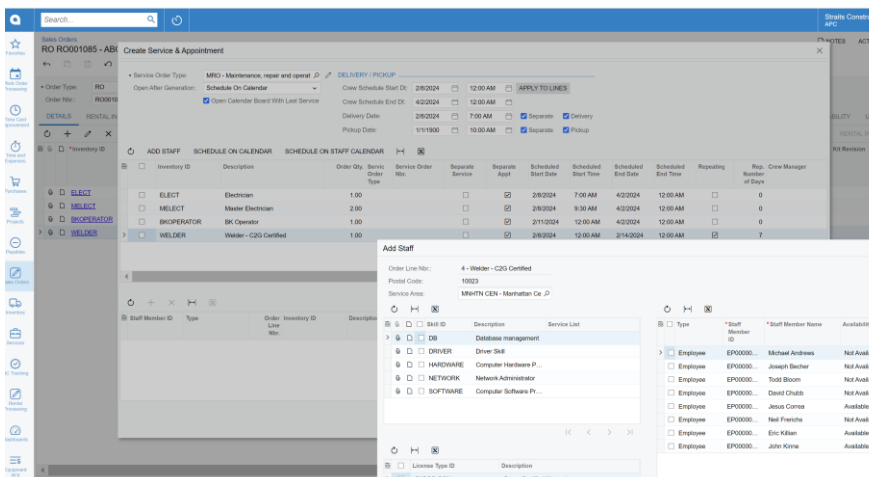
ENANCED SO TO SERVICES LINK FEATURES AND CAPABILITIES

Set Scheduling Requirements at the time Order Line Entry	Select technician, schedule starting and ending dates, and service order type from order line / Details grid.
Dispatch Selected Technicians at a Later Day	Ability for dispatcher to view and schedule selected technicians for the sales order line at a later date from the sales order.
Dispatch all Lines on the Sales Order from one Screen	Generate service orders and appointments for all sales order lines using the Create Service and Appointment action added to the sales order from.
Access Calendar Board from SO	Access the Calendar board directly from sales order displaying all dispatched technicians. Make final changes to created transactions as needed.
Skill and License Requirement Tracking	Display a warning or prevent users from creating appointments based on set preferences, if tech doesn't have the needed skill/license requirements.
Availability Tracking for Technicians	Display a warning or prevent dispatcher from creating appointments if technician is not available on the entered date based on preferences set.
Repeating Appointment Creation	Ability to create repeating appointments for selected order line based on the frequency set.
Flag Order Line Types Eligible for Scheduling	Setup desired stock and non-stock item types eligible for scheduling.
Set Required Scheduling Dates	Set required schedule starting and ending date and times for each order line.
Delivery and Pickup Scheduling	Creation of appointment for delivery of products sold, or for delivery and pickup of rental orders.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution today.

STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes.
- Control workflows
- Access the system from anywhere on any device – including mobile.
- Promote collaboration with all-inclusive user licensing

ADAPTABLE SOLUTION

Add and extend:

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

YOUR BUSINESS ACCELERATED

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows