



Service Management For Sage 100 2018

457 Palm Drive
Glendale, CA 91202
818-956-3744
818-956-3746
sales@iigservices.com

www.iigservices.com



Information in this document is subject to change without notice. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose without the express written consent of Information Integration Group, Inc.

TRADEMARKS

MS-DOS and *Windows* are trademarks of Microsoft Corporation.

SAGE 100 (formerly Sage ERP MAS 90 and 200) is registered trademark of Sage Software, Inc.

All other product names and brand names are service marks, and/or trademarks or registered trademarks of their respective companies.

Table of Contents

Installation Instructions and Cautions	5
Wait! Before You Install – Do You Use CUSTOM OFFICE?	5
Registering IIG products.....	6
ODBC Security	7
Role Maintenance.....	7
Pre-Installation Checklist.....	8
Installing Service Management.....	8
Instruction to Install Dispatch Board in Terminal Services Environment.....	12
Setup Activities	13
Security Settings.....	13
Service Management Options	17
Job Code Maintenance.....	30
Miscellaneous Item Maintenance.....	30
Skill Code Maintenance.....	33
Labor Code Maintenance.....	36
Technician Code Maintenance.....	38
Territory Code Maintenance	41
Task Type Maintenance.....	42
Nature of Task Maintenance	44
PM Code Maintenance	46
Routing Maintenance.....	47
Task/Dispatch Status Maintenance	49
Response Code Maintenance	53
Coverage Code Maintenance	54
Memo Manager Maintenance	56
Machine Code Maintenance	57
Reported Issue Maintenance	59
Crew Maintenance.....	61
The Main Menu	67
Contract Data Entry.....	67
Task Data Entry.....	115
Dispatch Data Entry	149
Auto Generate Task Selection.....	171
Tracking Changes on Contract and Task Notes	174
Auto Generate Invoice Selection	178
Auto Generate E-Mails Selection.....	187
Auto Close Task Selection.....	190
Auto Generate Contract Sales Documents	191
Payroll Batch Entry	193
Task/Dispatch Batch Update.....	199
Calculate Quantity to Produce/Purchase	201
Quick Dispatch Line Entry	209
Equipment Board.....	212

<i>Lookup by Item/Serial Number.....</i>	<i>218</i>
<i>Dispatch Board</i>	<i>222</i>
Role Maintenance.....	222
Dispatch Board Views	223
Map Point-Dispatch Board	238
How to Get a Standard Google Map API Key.....	245
Google Map API	246
<i>Inquiries Menu</i>	<i>250</i>
Task Inquiry	250
Task History Inquiry.....	252
Contract Inquiry	254
Dispatch Inquiry.....	257
<i>The Reports Menu</i>	<i>259</i>
Task/Dispatch Report	259
Technician Dispatch History Report	260
Customer Billing History Report	263
Productivity by Territory Report.....	264
<i>Contract Job Code Reports</i>	<i>266</i>
Contract Job Code Posting History Report.....	266
Contract Job Code Transaction History.....	268
<i>Standard Modules and Programs Modified for Service Management.....</i>	<i>270</i>
Item Maintenance	270
Product Line Maintenance	276
Bill of Materials Maintenance.....	277
Customer Maintenance	278
Sales Order Options.....	301
<i>Production Generation when Closing Manufacturing Dispatch</i>	<i>314</i>
S/O Invoice Data Entry.....	317
<i>Return Merchandise Authorization</i>	<i>319</i>
RMA Entry.....	319
RMA Receipts Entry	322
Job Maintenance.....	323
Cost Code Maintenance	325
A/P Invoice Data Entry.....	326
Job Inquiry	330
Job Posting Entry	331
<i>Payroll Integration.....</i>	<i>334</i>
Payroll Data Entry	334
<i>Business Insights Explorer</i>	<i>337</i>
A/R Explore	337
S/O Explore.....	339
S/M Explore	340
Dispatch View	342
Contract View	343
Items by Technician and Territory	345

Contract Items View	345
SM Closed Dispatches	348
Examples	349
Sales Order Entry (example from SM Options; Sales Kit Item Number)	349
Auto Generate Task Based on a PM Schedule	353
Custom Office	359
Visual Integrator	360

Installation Instructions and Cautions

PLEASE NOTE: *SAGE 100 must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 installation and setup now; then allow any updating to be accomplished automatically. Once SAGE 100 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.*

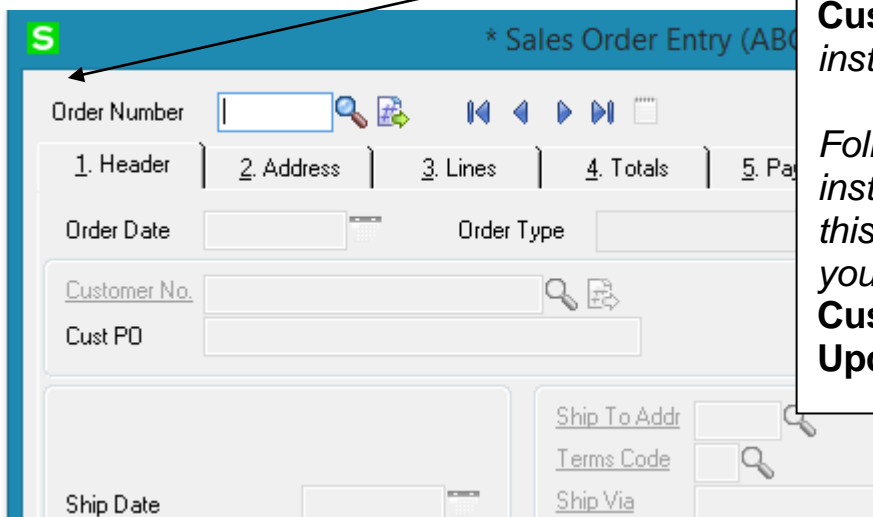
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: *If you have Custom Office installed, **and** if you have modified any SAGE 100 screens, you must run **Customizer Update** after you do an enhancement installation.*

But wait! BEFORE you run **Customizer Update**, it is **very important** that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

IIG Master Developer Enhancement Registration

Registered Customer: IIG - Glendale

Registration Information:

Reseller Name:

Serial Number: 1111111

Customer Number: 222222222

User Key: 33333333333333333333

Product Key: 55555 55555 55555 55555 55555

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	6.00		AAAAAAAAAAAAAAAAAAAA	BBBBB

Buttons: OK, Undo, Print Registration Form, Close

Status Bar: IIG ABC 12/16/2016

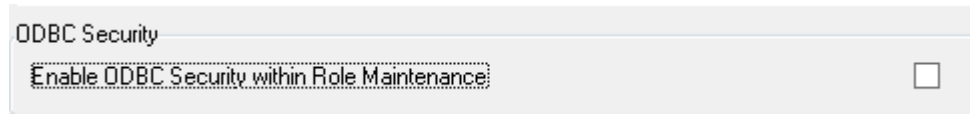
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

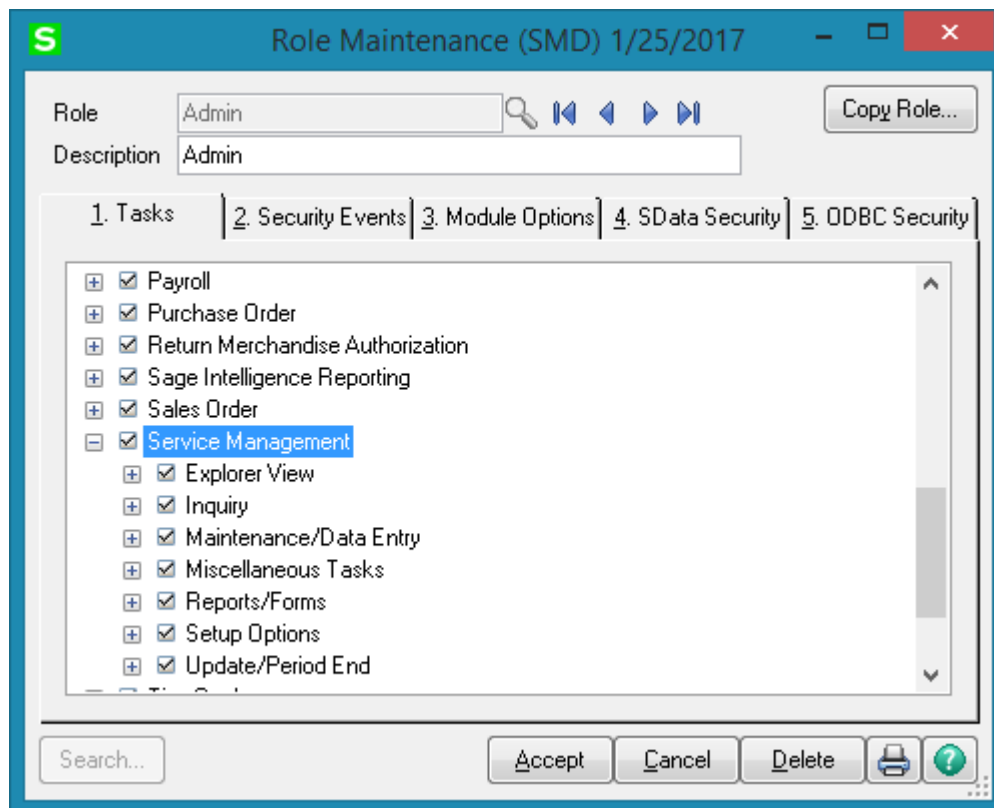
ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



Pre-Installation Checklist

Before beginning the installation of this enhancement:

1. Verify you have the following standard modules activated in your MAS system:

MAS90 Module	Module Required	Required Level
I/M	Y	2017 (5.40)
A/R	Y	2017 (5.40)
S/O	Y	2017 (5.40)
A/P	Y	2017 (5.40)
P/O	Y	2017 (5.40)
B/M	Y	2017 (5.40)

2. Necessarily refer to the steps described in the [Installing Service Management](#) section or the “SMP2017 \Doc\Installation Instructions for SMP.txt” file

Installing Service Management

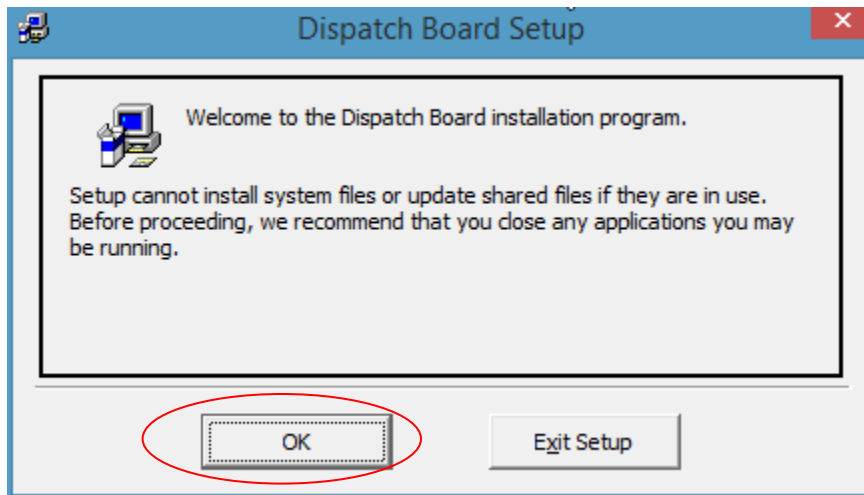
Note: If you are not going to use the SM Dispatch Board, you may start installation from step 2.

Note: In order to be able to run Dispatch Board from a Workstation it is necessary to have the Dispatch Board package installed on the workstation. You must have administrative rights to the workstation you are installing on.

How to install Dispatch Board:

1. Open the **Dispatch Board Package** folder and, select SETUP.EXE and double click on it. The installation program will then start.

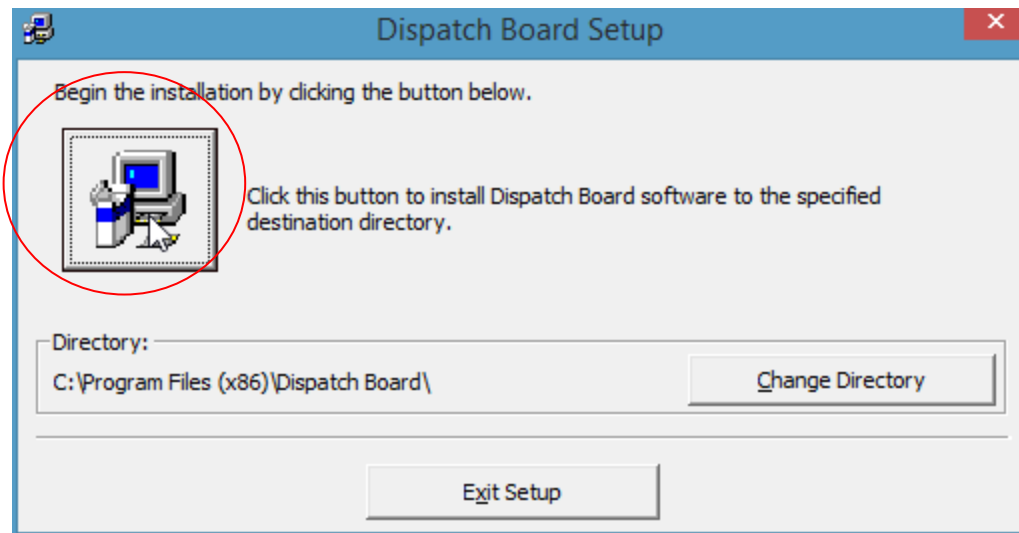
If on Vista, Win7 or Windows 2008 answer Yes on the Windows security prompt to allow the program to install.



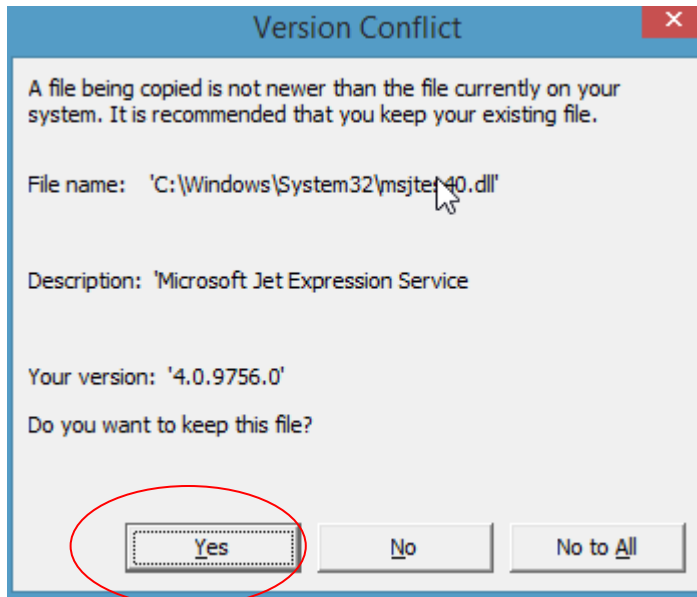
Press OK to proceed with installation.

1.2 The installation program will select the C:\Program Files\DispatchBoard\ directory.

Use the Browse button to point the installation program to the directory you would like and then click the Installation button to start the installation process.

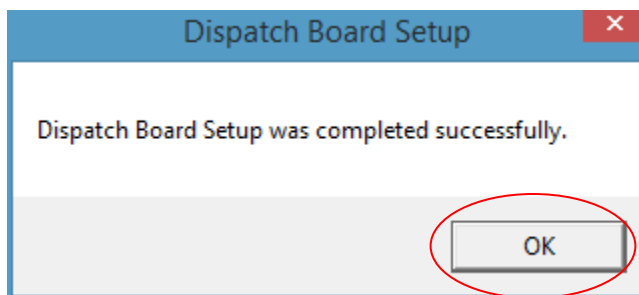


- 1.3 The following prompt appears if some DLL files being installed during this installation are older than the ones existing in your system:



We recommend that you keep the existing files. Select **Yes** to keep your system DLL files. You may have to do this a number of times.

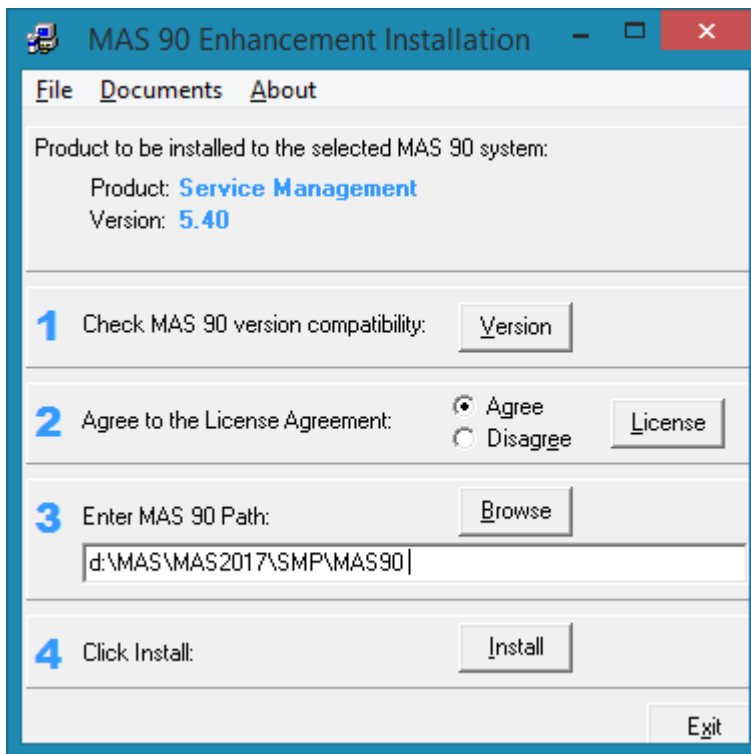
- 1.4 Once the Dispatch Board installation program finishes the following message appears. Click the OK button to exit the installation program.



- 1.5 After the DispatchBoard is successfully installed on your machine, you may login to your MAS SMP system and run Dispatch Board program under the **Service Management->Main** menu.

2. Be sure you have a full back up before installing!
- 2.2 Open the **SMP2015** folder.
- 2.3 Run **Setup.exe**.

Running SETUP.EXE begins the installation process. The installation screen will look similar to this:



Click the **Agree** option (the **Install** button will not be activated till Agree is selected).

Use the **Browse** button to point where MAS 90 is installed

Now click the **Install** button on the **MAS 90 Enhancement Installation** screen.

Wait for the installation process to be completed, then log in and update the Administrator role to authorize the next steps.

3. Open the **IIG_Dll_CD** and run the **Setup.exe** to install and register some DLL(s) and OCX(s) needed for SM proper functionality. Follow on-screen instructions for installation.

Instruction to Install Dispatch Board in Terminal Services Environment

For installing Dispatch Board in a terminal server environment follow the steps below:

1. All users must be off of the terminal server.
2. Install in Administrator mode (CHANGE USER /INSTALL)
3. Install Dispatch Board first. We recommend installing it in the C:\Program Files\DispatchBoard\ directory instead of the UAC redirects.
4. Install IIG DLL, same as with Dispatch Board.
5. Change user back to execute mode (CHANGE USER /EXECUTE).
6. You must install these programs on every server that a Sage 100 client is on for the dispatch board to work.
7. In MAS, update the roles to give access to SMP files if ODBC security is enabled. We recommend that you create a Dispatch Board role for this and add that role to the users who need it.

Setup Activities

Security Settings

Role Maintenance

On the Tasks tab, select the Service Management to assign security permissions and allow access to SM module tasks. To allow access to all SM menus and assign all security permissions, select the Service Management check box.

To expand each level, click the + graphic. To select all items in a level, select the check box next to the + graphic.

You can allow or restrict the level of access to tasks by selecting or clearing the check boxes for tasks within Service Management module.

The following security permissions are available for SM Module:

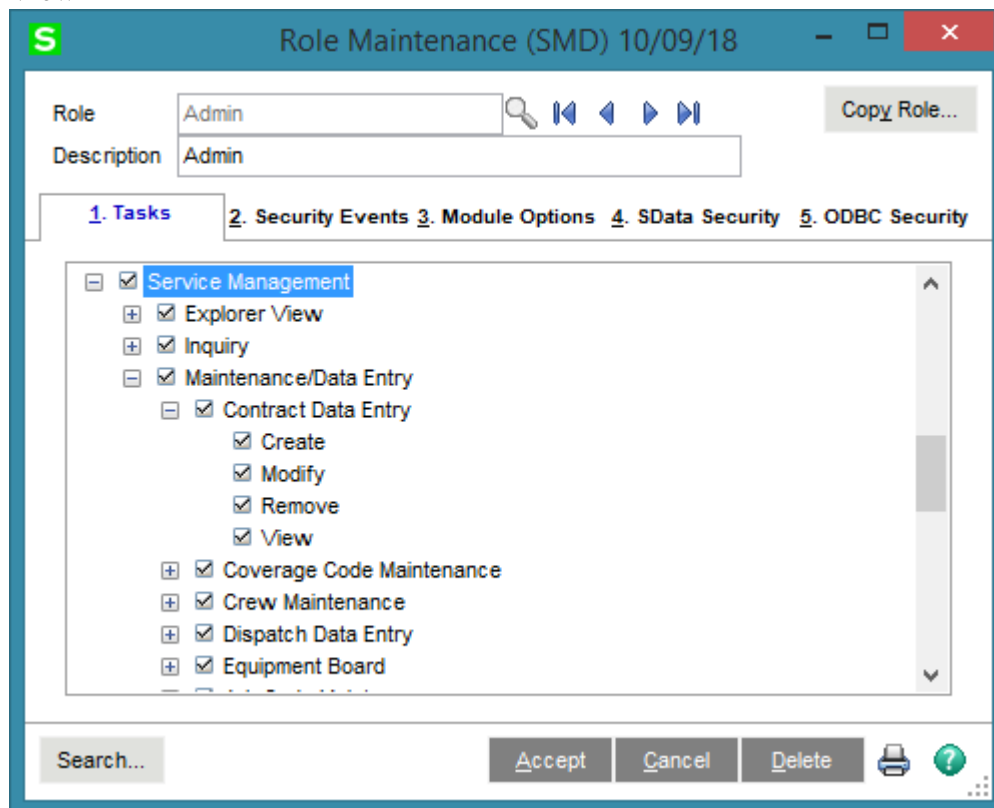
For Maintenance/Data Entry tasks:

Create

Modify

Remove

View



For update tasks:

Print

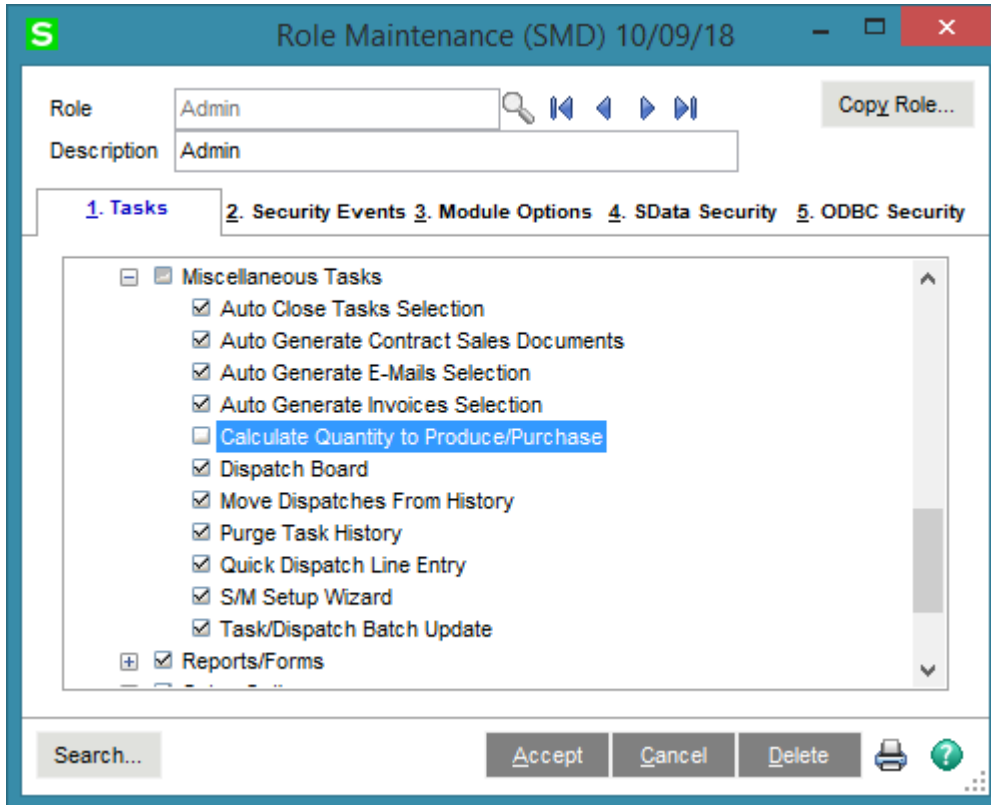
Update

For set up tasks:

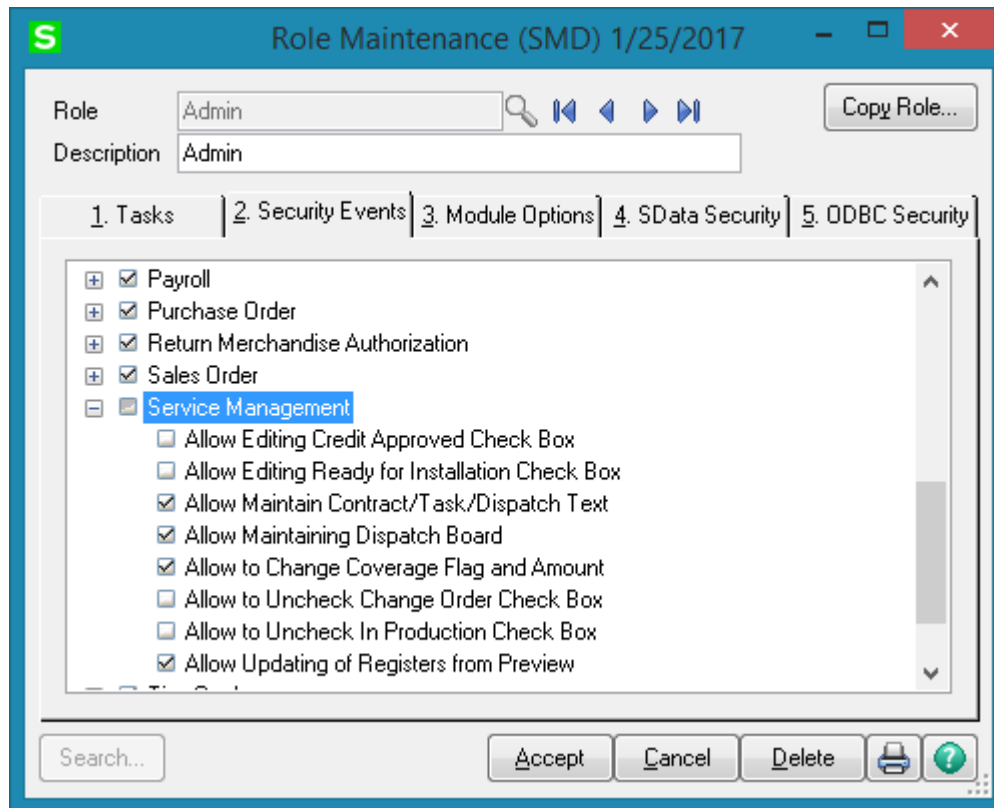
Modify

View

For **Explorer View**, **Inquiry**, **Reports/Forms** and **Miscellaneous Tasks** you may allow or restrict access to certain menus.



Use the **Security Events** tab to assign security events for SM Module for the current Role. Initially, all check boxes are defaulted to a cleared setting on the Security Events tab. Select the Service Management check box to select all of the security events. Select the check box next to a specific security event to assign it for the current role. The **Allow Editing Credit Approved Check Box**, **Allow Editing Ready for Installation Check Box**, **Allow Maintain Contract/Task/Dispatch Text**, **Allow To Maintain Dispatch Board**, **Allow to Change Coverage Flag and Amount**, **Allow to Uncheck Change Order Check Box** and **Allow to Uncheck In Production Check Box** security events have been added to the **Service Management** module. Select the check box next to a specific security event to assign it for the current role. Clear check boxes to specify which security events are not assigned for the current role.



Allow Editing Credit Approved Check Box – if checked, allows the user to manually change the Credit Approved flag in the Installation Management screen.

Allow Editing Ready for Installation Check Box – if checked, allows the user to change the **Ready For Installation** setting in the Installation Management screen.

Allow Maintain Contract/Task/Dispatch Text – if checked, allows the user to maintain the notes (Extended Description) created for Contract, Task and Dispatch Entries. The users assigned to a Role for which the **Allow Maintain Contract/Task/Dispatch Text** security event is not enabled (checked) cannot edit existing notes, they can append only new notes to the existing one.

Allow Maintaining Dispatch Board – if checked allows the user to create new Dispatch Board view, new Task/Dispatch, open and modify the Task/Dispatch, change status; otherwise the user can access the Dispatch Board only in the inquiry mode.

Allow to Change Coverage Flag and Amount – if checked, allows the user to enter the Contract Total Amount and set coverage flags.

Allow to Uncheck Change Order Check Box – if checked, allows the user to change the Change Order flag manually in the Installation Management.

Allow to Uncheck In Production Check Box – if checked, allows the user to turn off the In Production flag set automatically after Production Task is generated.

On the **Module Options** tab you can select SM Module specific options for current Role.

Allow Visual Integrator Exports - Allows the user to export data using Visual Integrator.

Allow Visual Integrator Imports - Allows the user to import data using Visual Integrator.

Role Maintenance (SMD) 10/09/18

Role: Admin

Description: Admin

Copy Role...

1. Tasks 2. Security Events 3. Module Options 4. SData Security 5. ODBC Security

- ☒ eBusiness Manager
- ☒ Fixed Assets
- ☒ General Ledger
- ☒ Inventory Management
- ☒ Job Cost
- ☒ Library Master
- ☒ Payroll
- ☒ Purchase Order
- ☒ Return Merchandise Authorization
- ☒ Sales Order
- ☒ Service Management
 - ☒ Allow Visual Integrator Exports
 - ☒ Allow Visual Integrator Imports

Search...

Accept Cancel Delete

Service Management Options

Use **Service Management Options** from the **Setup** menu to customize S/M to fit your company's individual needs.

Main Tab

Enable Dispatch Board – Select this checkbox to be able to run the **S/M Dispatch Board**.

Enable Dispatch Drag/Drop Feature for Updating Task – Select this checkbox if you want to be able to update the Task's Schedule/Due Dates or Preferred Technician just by dragging/dropping the Dispatch transaction on the Board. If this feature is enabled respective prompts will appear in the Dispatch Board if:

- The task scheduled date, due date and preferred technician should also get updated.
- The scheduled date, due date and the technician of any other dispatches stored for the task should also get updated.
- The Labor Entries for the task moved and any other dispatches stored for the task should also get updated.

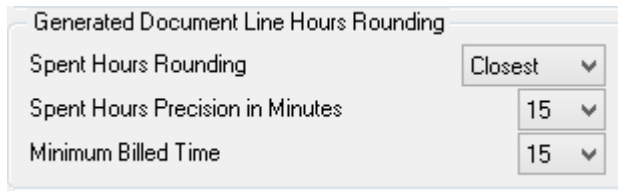
Map Google App Key - enter your Google Map API key o be able to use Google maps. Refer to [How to Get a Standard Google Map API Key](#) for details.

Automatically Increment Steps By- is used as increment step for Routing. Available values are 10; 20; 30; 40; 50... 100.

Add Note when Email is Sent – select this checkbox to add a time stamped note to the **Task Text Maintenance** when Email is sent to the Technician by the **Quick Email** button.

Add Note for Dispatch Status Change - select this checkbox to add a time stamped note to the **Task Text Maintenance** when Dispatch status is changed.

Generated Document Line Hours Rounding – this group provides settings for rounding of dispatch labor lines' hours during the Labor Charge line entry.



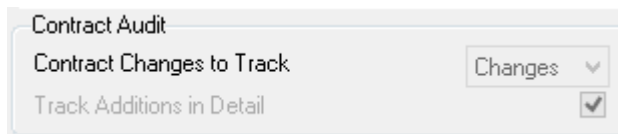
Spent Hours Rounding- the available options are: **Up, Down, Closest, None.**

Spent Hours Precision in Minutes- allows for setting the precision in Minutes to be used while rounding the hours.

Minimum Billed Time dropdown menu also shows minutes and can be set so that the specified time is always billed even if the actual spent time rounded is less than this setting.

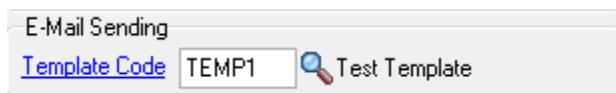
Contract Audit (Currently not available)

Contract Changes to Track – available options are: **None; All; Deletions, Additions, Changes.** Select **Yes** to track all kind of changes, **None** for not tracking at all. **Deletions, Additions,** or **Changes** setting will allow for tracking respective actions.



Track Additions in Detail – select this checkbox if you want to track the Contract changes in detail.

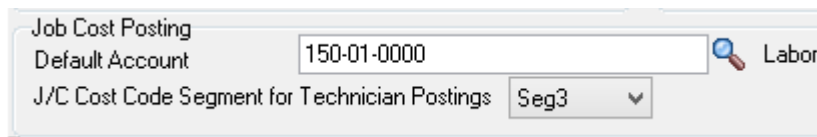
Email Sending



Template Code - select the Email Template Code to be used by default when sending email to the Technician by the **Quick Email** button added on the Task Data Entry. You may select one from existing Template Codes or create a new Template in the Template Code Maintenance launched by the Template Code hyperlink.

Job Cost Posting

The **Job Cost Posting** options are available only if the **Job Cost** module is setup in the system.

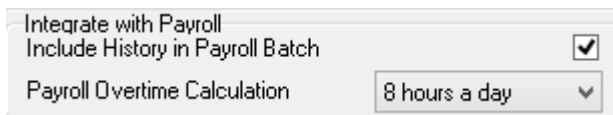


Default Account –select the **G/L Account** to be used as the default **G/L Account** during the import into the **Job Posting Entry**. It is used if the **Post to G/L for Work in Process** option is selected in the **Job Cost Options**, otherwise there is no **G/L Account** specified for the **Material Cost Type** of the selected **Cost Code**.

J/C Cost Code Seg. for Tech Posting- is used for specifying the segment of Cost Code that should be substituted with **Cost Code Segment Value** entered in the **Technician Code Maintenance** (if any), during the import into the **Job Posting Entry**.

Integrate with Payroll

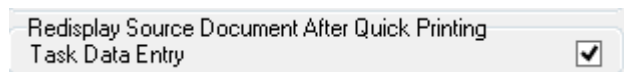
Include History in Payroll Batch – check this box to have the program search for labor records during the given period in the S/M history as well. This setting is the default setting for all Payroll Batch Entries, and can be changed on each separate Payroll Batch Entry.



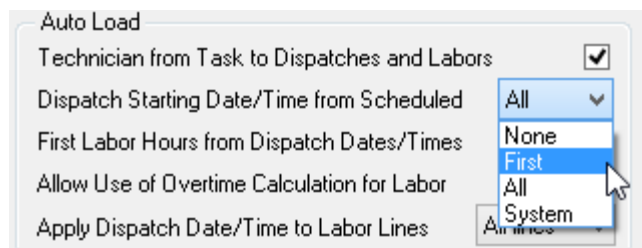
Payroll Overtime Calculation- available options are: **8 hours a day** or **40 hours a week**. This determines how the hours over time are calculated: on the daily or weekly basis.

Redisplay Source Document After Quick Printing

Check the **Task Data Entry** box to view corresponding source Task in the Task Data Entry window after printing by the **Quick Print** button. Clear the check box to return to the Task data entry window with no record selected.



Auto Load



Technician from Task to Dispatches and Labors- check this box to load task's technician into generated dispatches as well as to the Labor lines.

Dispatch Starting Date/Time from Scheduled- allows loading the **Scheduled Date/Time** from the task into the generated dispatches. The following options are available: **None, First, All, System.**

- **None** - the Task's **Scheduled Date/Time** will be loaded into none of the generated dispatches. In this case the Dispatch Date and dispatch Starting/Ending Dates are defaulted to S/M module current **Accounting Date**.
- **First**- the Task's **Scheduled Date/Time** will be loaded only into the first dispatch generated.
- **All**- the Task's **Scheduled Date/Time** will be loaded into all dispatches being generated.
- **System**- the **Dispatch Starting Date/Time** will be populated with current system date/time.

First Labor Hours from Dispatch Dates/Times- allows automatically calculating the Hours Spent based on the dispatch Starting and Ending Date/Time and loading it to the first labor line entered in the dispatch.

Allow Use of Overtime Calculation for Labor - enables special calculation of Labor with Overtime Factor, based on the working hours and Coverage Code. (Refer to [Labor Charge Data Entry](#) for more details)

Apply Dispatch Date/Time to Labor Lines- enables automatically applying the **Dispatch Date/Time** to the Labor lines being entered. Three options are available:

- **None**- the Dispatch **Date/Time** will be applied to none of the Labor lines.
- **First**- the Dispatch **Date/Time** will be applied only to the first Labor line entered.
- **All**- the Dispatch **Date/Time** will be applied to all Labor lines being entered.

Entry Tab

Time entry drop box in Dispatch Data Entry- select a value (minutes) from the drop down to be used for populating drop-down lists of the starting and ending time selection in the **Dispatch Data Entry** program.

Next Automatic Task Entry Number- enter the next task number to assign when using the Automatic Task Number feature in the [Task Data Entry](#).

Next Automatic Contract Number- enter the next contract number to assign when using the Automatic Contract Number feature in the [Contract Data Entry](#).

Next Automatic Template Contract Number- enter the next template contract number to assign when using the Next Template Contract Number feature **NTC** in the [Contract Data Entry](#). A template contract is used to generate a regular contract (such as a standard service contract) whenever a particular item is sold. If you enter a template contract once and then assign it to an item in **Inventory Maintenance**, the system will automatically set up a contract adhering to the rules of the template for any customer who purchases that item.

Default Values

This group of options allows for setting default values to be used when entering new Tasks, Dispatches and generating a sales document upon closing the Dispatch.

Task type- select the default Task type to be assigned when entering a new Task.

Dispatch Status - select the status to be used by default when new Dispatch is created.

Close Dispatches into the- select **Sales Order/Invoice** to indicate whether charges from a closed dispatch should generate a sales order or an invoice. Select **Costing** to generate I/M Issue Transaction for the inventory item lines of the Dispatch. Select **None** to not generate any document when closing dispatch.

Installation Task Status (CA)- select the status to be defaulted to the Tasks generated from Installation Order if the Installation Management **Credit Approved** checkbox is not selected.

Don't prompt if technician is not setup with the required skill set- check this box to suppress the prompt appeared in the Dispatch Board and Sales Order Entry if the technician's skill level does not match the skill required for that Nature of Task.

Don't prompt if technician is busy during the scheduled time- check this box to suppress the prompt appeared upon accepting the Dispatch if the Technician is busy on other active dispatches during current time period (Dispatch Starting - Ending Date/time).

Prompt if equipment is busy during the scheduled time- select this box to have respective prompt appeared upon generating a Dispatch from Equipment Maintenance or when accepting the Dispatch if the Equipment No is selected on other active dispatches during current time period (Dispatch Starting - Ending Date/time).

Documents Path - when running **Service Management Options** the first time the **Documents Path** and the **"Default Path To Copy From"** fields are automatically set to the path formed as the **UNC** path of the MAS90 with ...Documents\"Company Code" folders created inside it (e.g. \\GOHAR\d\MAS\MAS2017\SMP\MAS90\Documents\SMD). These paths can be changed if desired.

When new Contract/Task is created in the Contract Entry/Task Data Entry the **Documents Path** is defaulted to the one set in the Service Management Options with the Contract/Task and Contract Number/Task Number subfolders automatically created.

Default Path To Copy From – select the path of documents from where you may easily copy the Contracts/Task related documents while creating the Contract/Task respectively in the Contract/Task Data Entries.

Note: Data directory paths on the Sage 100 Server must be in a UNC format (no local or mapped drives).



Commit Quantity – select this checkbox to automatically set the Commit Quantity flag on the Dispatch Header.

Present Sales Kit as a Set of Regular Items- If this check box is selected, the Sales Kit Item number will be replaced with a comment line indicating sales kit number during Dispatch Data Entry, Sales Order Entry or Invoice Data Entry. All the components of that kit will be presented as regular line items.

Present Sales Kit as a Set of Regular Items	<input type="checkbox"/>
Item Contract Instead Of Order Contract	<input checked="" type="checkbox"/>

Click here for an example:

Item Contract Instead of Order Contract- Check the **Item Contract Instead of Order Contract** box to attach the contract specified for the Item in the **Inventory Maintenance** program instead of the contract specified in the **Sales Order Entry** to the tasks generated for the item.

Retain Task Entry History	<input checked="" type="checkbox"/>
Contract is Required	<input type="checkbox"/>
Allow Quote Hours in Task Entry	<input checked="" type="checkbox"/>
PM Task Generate Based On Task Close Date	<input type="checkbox"/>
Generate First Task Based On Contract Starting Date	<input type="checkbox"/>
Commit Quantity During MFG Dispatch Generation	<input checked="" type="checkbox"/>
Default MFG Task Customer	01-ABF 
Transfer Task Type	T  Transfer Task

Retain Task Entry History- Select this check box to retain Task history information. If this checkbox is selected the task will be moved to the Task History when it is closed. Clear this check box if you do not want to retain task history.

Contract is Required - Select this checkbox to require Contract entry when creating a Task in the **Task Data Entry**. Leave it blank if you are going to create tasks without Contract.

Allow Quote Hours in Task Entry- Select this checkbox to have the **Quote Hours** and **Quote Amount** fields visible on the Labor Charge Entry.

PM Task Generation Based On Task Close Date- Check this box to generate the next preventive maintenance task based on the Task Close Date.

Generate First Task Based on Contract Starting Date – check this box to generate the first PM Task (through the Auto Generate Task Selection program) based on the Contract Starting Date without taking into account the number of days for a given PM code.

Commit Quantity During MFG Dispatch Generation- Select this checkbox to commit the Item quantity on MFG Dispatches being generated. If this checkbox is selected the **On Task** and **Req for Task** fields added to the Item Maintenance Quantities grid are respectively updated for Bill and Component items.

Note: It is highly recommended to not enable this option if W/O module is activated in your system.

Default MFG Task Customer- select the default **Customer Number** to be loaded as the customer number of the Task generated by the **Calculate Quantity to Produce/Purchase** program.

Transfer Task Type – select the Task type to be used for transfer Task. If there is **Transfer Task Type** specified in the S/M Options, **Transfer** button will be shown on the Dispatches created for the Tasks with Task type matching the one selected here. Refer to the [Transfer Dispatch Items](#) section for details

Line Entry Tab

Service Management Options (SMD) 1/25/2017

1. Main | 2. Entry | **3. Line Entry** | 4. Additional

Use Alternate Warehouse for Out-of-Stock Items ☒
 Check for Available Quantity ☒
 Default Warehouse: 000
 Material Job Code: 410-000-000
 Labor Job Code: 500-000-000
 Freight Job Code: 455-000-000
 Job Code Size: Seg 1: 3, Seg 2: 3, Seg 3: 3
 Inventory Item Sales Account from Nature of Task ☒

Billing Rate and Cost Calculation Priority
 Highest: Technician Code
 Middle: Labor Code
 Lowest: Skill Code

Sales Account Priority
 1. Nature of Task
 2. Nature of Task
 3. Technician Code
 4. Skill Code
 5. Nature of Task

Labor Billing Presentation: Miscellaneous Item
 Sales Account: 105-00-0200
 COGS Account: 116-00-0000
 Product Line: C&A
 Order In Item No: Technician and Labor/Skill
 Default Misc Item:
 Miscellaneous Item: DESK-1000
 Accts. receiv. - West Warehse
 Inventory-Scrap
 Bypass Cost G/L Postings For Labor Items ☐
 Calculate Taxes on Labor Based on: Dispatch Line

Manual Accept Cancel

Use Alternate Warehouse for Out of Stock Items- Select this check box to fill dispatch lines from an alternate warehouse if the primary warehouse is out of stock for the selected item. Clear this check box if you do not want to fill dispatch lines from an alternate warehouse. This field is available only if the Integrate with Inventory Management check box is selected, and the Require Multiple Warehouses check box is selected in the Inventory Management options.

Enter a warehouse code set up in the Inventory Management module to use as the primary default warehouse used in Sales Order Entry and Invoice Data Entry. Click the Lookup button to list all warehouse codes. This field is available only if the Sales Order module is integrated with Inventory Management, and the Require Multiple Warehouses check box is selected in Inventory Management Options. The default warehouse entered at this field is overridden by the item default warehouse in Sales Order Entry and Invoice Data Entry if the Use Item Default Warehouse check box is selected. It is also overridden if there is a default warehouse defined for the customer ship-to address entered in Sales Order Entry and Invoice Data Entry.

The **Default Warehouse** field is only accessible if you have installed the Inventory Management module for MAS 90 on your system, and multiple warehouses are used.

The warehouse selected here is used as the default when entering items in the Dispatch Data Entry.

Job Codes are used to track material and labor cost and revenue in the contract file. Job Codes are entered for each inventory item, for posting of material related information and in the Technician, Labor and Skill Code Master files for labor information tracking.

You can add new codes in the **Job Codes Maintenance** program in the Service Management Setup menu.

If no Job Codes are assigned to inventory items or charge codes, the default job codes specified in **Service Management Options** will be used for material or labor items.

A total of nine characters can be used for Job Codes. You can define segmentation of the Job Codes by changing the appropriate setting on the Service Management Options screen here on the second tab.

Select the **Inventory Item Sales Account from Nature of Task** checkbox to load an Inventory Item Sales Account from Nature of Task Sales Account, instead of Product line, when entering Item in the Dispatch Data Entry lines.

Labor Billing Presentation group is a set of controls that allows the user to choose from the following options for charges or labor billing presentations.

Labor Billing Presentation	Miscellaneous Item	Miscellaneous Item	DESK-1000
Sales Account	105-00-0200	Accts. receiv. - West Warehse	
COGS Account	116-00-0000	Inventory-Scrap	
Product Line	C&A	CABLES & ACCESSORIES	Bypass Cost G/L Postings For Labor Items <input type="checkbox"/>
Order In Item No	Technician and Labor/Skill	Calculate Taxes on Labor Based on	Dispatch Line
Default Misc Item			

- If **None** is selected, the system will not process labor charges.
- If **Inventory Item** is selected a regular Item will be loaded to the **Sales Order/SO Invoice** generated based on the **Dispatch Labor/Skill** line. The system will build an Inventory Item based on the Technician Code of the person who performed the Task and Labor or Skill Code of the job that was performed.
 - The **Product Line** should be specified.

The **Product Line** entered here will be used to get the default information for the Inventory Item being generated upon closing the Dispatch. The **Tax Class, Description (Extended Description), Default Warehouse, Price** and **Cost** fields will be populated

correspondingly from SM files. The **Material Job Code** specified on the SM Options will be applied to the Inventory Item if no Job Code is entered for the selected **Product Line**.

- If **Miscellaneous Item** is selected in the **Labor Billing Presentation** field, the system will build a Miscellaneous Item based on the Technician Code of the person who performed the Task and Labor or Skill Code of the job that was performed.
 - The **Miscellaneous Item** should be selected to get the default information when a Misc. Item is generated upon closing the Dispatch.

For the generated **Miscellaneous Item** the **Tax Class**, **Price** and **Cost** fields are populated with corresponding values from SM files.

- If **Special Item** is selected, the system will load a Special Item line to the **Sales Order/SO Invoice** generated based on the **Dispatch Labor/Skill** line.
 - The **Sales** and **COGS Accounts** entered here will be applied to the Special Item line loaded in the Sales Order/SO Invoice if no **Sales** and **COGS Accounts** will be found set for corresponding fields of SM files.

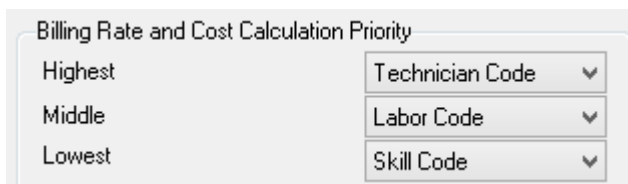
The **Calculate taxes on Labor based on** drop-down box allows the user to define how **Sales Taxes** should be calculated. The following options are available: **None**, **Dispatch Line**, **System Default**.

- **None**-means the **Tax Class** will not be shown on the **Dispatch Line** and it will be set to "NT" for the line item loaded in the Sales Order or Invoice transaction.
- **Dispatch Line**-means the **Tax Class** specified on the Dispatch Labor Line will be carried over to the corresponding line item loaded in the Sales Order or Invoice transaction.
- **System Default**-means that the **Tax Class** of corresponding Item (Inventory, Misc, Special) generated upon closing the Dispatch (based on the Labor Billing Presentation) will be applied.

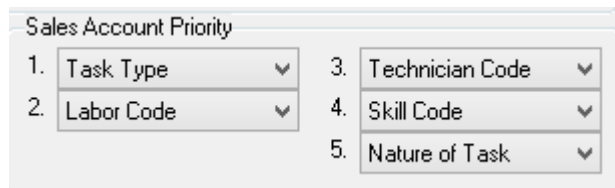
Default Misc. Item – select a default Misc Item to be loaded as Default Misc Item of the Task. It is loaded on the dispatch lines, when new dispatch is entered or generated from the Sales Order.

The **Bypass Cost G/L Postings For Labor Items** check box allows to process items generated for labor with zero cost, that is, cost is not posted to G/L.

The **Billing Rate and Cost Calculation Priority** group of controls will define the priority by which labor billing rates and costs will be calculated. Rate and Cost can be used from **Technician Code**, **Labor Code**, or **Skill Code**.



Sales Account Priority defines the priority of using the G/L accounts for sales postings of Service Management.

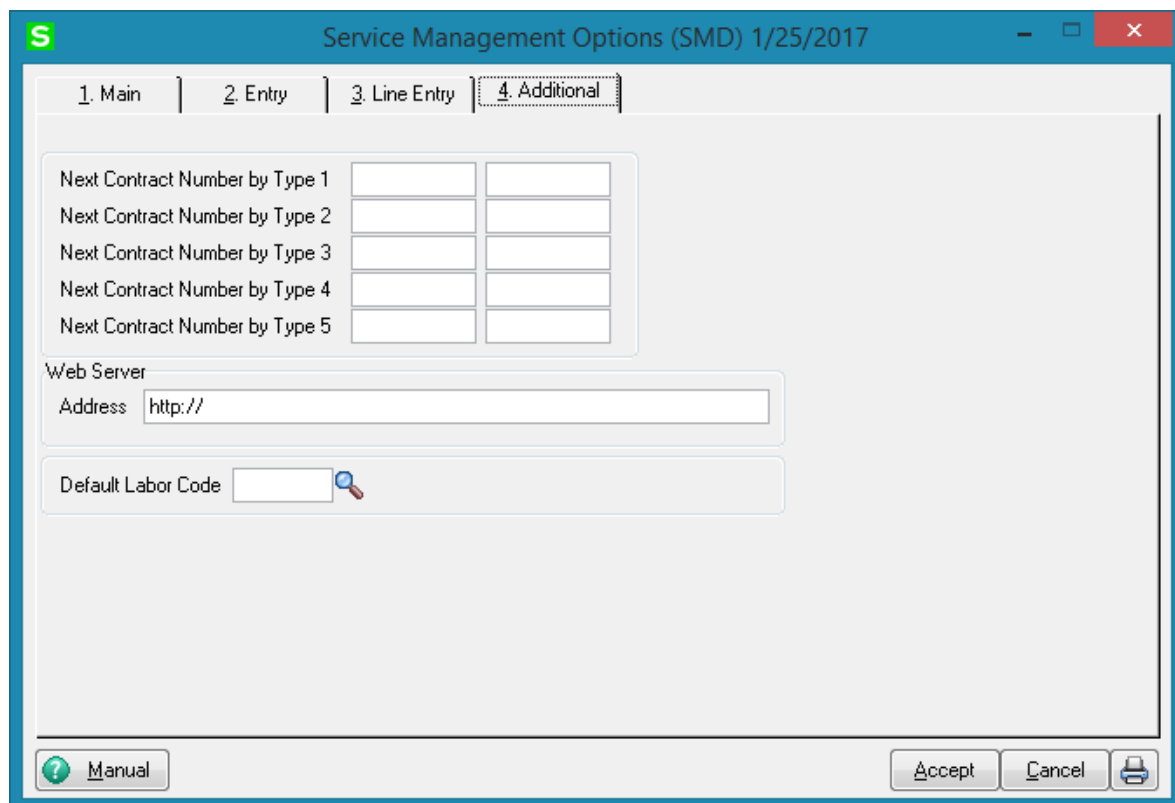


A dialog box titled "Sales Account Priority" with five numbered dropdown menus arranged in two columns. The first column contains "1. Task Type" and "2. Labor Code". The second column contains "3. Technician Code", "4. Skill Code", and "5. Nature of Task". Each dropdown menu has a downward arrow icon.

G/L accounts are set in the **Technician Code Maintenance**, **Labor Code Maintenance**, **Skill Code Maintenance**, **Nature of Task Maintenance** and **Task Type Maintenance**. The first in the list will be used if on file, otherwise the second will be used, etc.

Additional Tab

Next Contract Number by Type (1-5) fields have been added on the **Additional** tab of the **Service Management Options** screen to allow specifying Contract types and respective Next Number for each type:



A screenshot of the "Service Management Options (SMD) 1/25/2017" window. The "4. Additional" tab is selected. The window contains several input fields: "Next Contract Number by Type 1" through "Next Contract Number by Type 5", each with two adjacent text boxes; "Web Server Address" with a text box containing "http://"; and "Default Labor Code" with a text box and a magnifying glass icon. At the bottom, there is a "Manual" button with a question mark icon, and "Accept", "Cancel", and a printer icon button.

Enter the Contract types and specify next number for each type:

Next Contract Number by Type	Type	Value
Next Contract Number by Type 1	MAINT	MNT000001
Next Contract Number by Type 2	REP	REP000001
Next Contract Number by Type 3	RENT	RNT000001
Next Contract Number by Type 4	TRAIN	TRN000001
Next Contract Number by Type 5	SERV	SRV000001

Web Server
Address: http://

Default Labor Code:

Manual Accept Cancel

The **Next Contract Number by Type** setup here will be used when creating a new Contract in the **Contract Data Entry** by the **NBT** button.

Contract No.

Contract Date:

Manual Accept Cancel

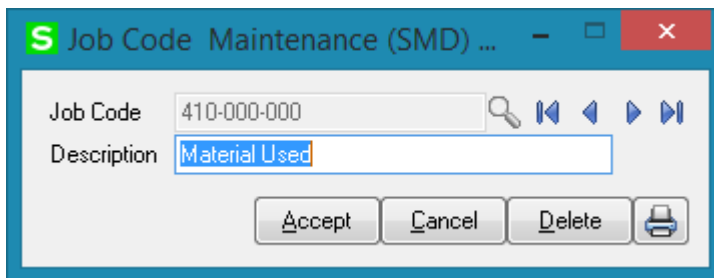
Web Server – this field is intended for specifying the URL of SMP mobile site.

Default Labor Code – the **Default Labor Code** setup here is automatically loaded in the **Task Equipment Maintenance** when a new line is added for a Task Item.

Job Code Maintenance

Job Codes are used to track material and labor cost and revenue in the contract file. Service Management modifies several standard MAS 90 programs, including Inventory Maintenance, Miscellaneous Item Maintenance and others, adding a new field – the Job Code field. You can assign job codes to the inventory items and charge codes in order to track their usage by service contracts.

The **Job Code Maintenance** program from the **Service Management Main** menu allows you to add and remove Job Codes.



If no Job Codes are assigned to inventory items or charge codes, the default job codes specified in **Service Management Options** will be used for material or labor items.

A total of nine characters can be used for Job Codes. You can define segmentation of the Job Codes by changing the appropriate setting in the second tab of **Service Management Options**.

Miscellaneous Item Maintenance

The **Job Code** field added on the Main tab of the **Miscellaneous Item Maintenance** allows for assigning **Job Codes** to **Miscellaneous Items** and **Charges** to be used as default in the Sales Order/Invoice created for a Contract.

S Miscellaneous Item Maintenance (SMD) 1/25/2017

Item Code: MCONTR
Item Type: Miscellaneous
Description: Monthly Maintenance Billing

1. Main | 2. Accounts | 3. History

Standard Unit Price: 1,000.000
Standard Unit Cost: .000
Sales Tax Class: NT
Purchases Tax Class: NT
Commodity Code:

Sales Unit of Measure: MTH
Purchases Unit of Measure:
Calculate Commission on Sales: ☒
Image:

Accounts Receivable
Allow Use in Accounts Receivable: ☒
Post Sales by Division: ☒
Sales Order
Allow Use in Sales Order: ☒
Allow Trade Discount: ☐
Drop Ship Item: ☐
Returns Allowed: ☐
Internet Enabled: ☐
Display on Mobile: ☐
Job Code: 500-000-000 Installation Labor

Purchase Order
Allow Use in Purchase Order: ☐
Allocate Landed Cost: ☐
Vendor Item Code:
Bill of Materials
Allow Use in Bill of Materials: ☐
Setup Charge: ☐
Unit of Measure: MTH

Accept Cancel Delete

Sales Order Entry (SMD) 1/25/2017

Order Number: 0000363

User: useriig

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

	Item Code	Ordered	Job Code	Back Ordered	Unit Price	Extension
1	/MCONTR	1.00	500-000-000	.00	1,000.000	1,000.00
2		.00		.00	.000	.00

Quick Row: 1

Description: Monthly Maintenance Billing
Warehouse: MTH
Unit Of Measure: MTH
Shipped: .00
Price Level: .00

Total Amount: 1,000.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

Select the **Display on Mobile** check box to make the Miscellaneous Item available in the SMP Mobile.

Skill Code Maintenance

In Service Management, **Skill Codes** describe, in a generic way, the type of work a technician can perform. The **Skill Code Maintenance** program is used to maintain, edit and add skill codes used in the Service Management Module.

Skills defined in this program are used during Technician Code Maintenance to describe the different skills, at appropriate levels, of each technician. This allows you to pick the appropriate or most qualified technician during Task or Dispatch Data Entry.

Field	Value
Skill Code	PRF
Description	Professional
Job Code	500-000-000
Sales Account	195-00-0000
Tax Class	TX
Skill Cost	45.00
Billing Rate	85.00
Retainer Factor	1.00
Overtime Factor	2.50

Job Code is used when posting labor charges to the contract file.

Sales Acct is used for postings when closing dispatches with labor (based on the priority in Options).

Skill Cost is used for posting cost to contracts for transactions generated when closing dispatches with labor (based on billing rate calculation).

Billing Rate is the billing rates for labor items subject to contract settings or the billing rate calculation priority set-up in **Service Management Options**.

The **Retainer Factor** is used when calculating used hours from the contract hours.

The **Overtime Factor** is used for calculation of hours during Labor lines entry for the hours out of the coverage period defined by the **Coverage Code** of the task.

The **COGS G/L** button becomes visible if the **Labor Billing Presentation** is set to **Inventory Item** in the **Service Management Options**.

Skill Code Maintenance (SMD) 1/31/2017

Skill Code: PRF
Description: Professional

Job Code: 500-000-000
Sales Account: 195-00-0000
Tax Class: TX
Skill Cost: 45.00
Billing Rate: 85.00

Installation Labor
Software costs (net)
Taxable
Retainer Factor: 1.00
Overtime Factor: 2.50

COGS G/L

Accept Cancel Delete

Clicking the **COGS G/L** button opens the **Cost Of Goods Sold** screen, where you can specify account to be used for the labor items generated from the selected Skill during dispatch closing into Sales Orders or Invoices.

Cost of Goods Sold

Product Line: SRV
Description: Services

COGS Account: 150-01-0000

Accept Cancel Delete

Different G/L accounts may be set for different **Product Lines** and for all the Product Lines (empty Product Line) not having separate accounts specified. The COGS Account specified for current Product Line is used for the generated inventory items if the **Product Line** matches the one set for Inventory Item in the **Service Management Options**. If there is no account specified for that Product Line, the program applies the **COGS Account** specified for blank **Product Line**.

S Cost of Goods Sold

Product Line 🔍 🔑 ⏪ ⏩ ⏴ ⏵

Description

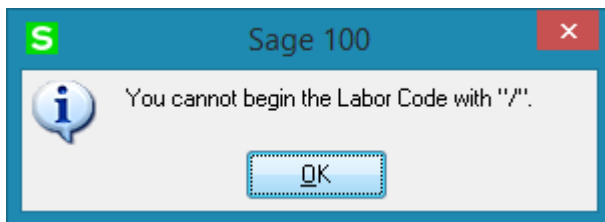
COGS Account 🔍 Labor

Labor Code Maintenance

In **Service Management**, **Labor Codes** represent the type of work a technician can perform.

The **Labor Code Maintenance** program is used to maintain, edit and add labor codes used in the **Service Management** Module.

The **Labor Code** cannot start with “/” symbol and the following message will popup upon entry of labor code starting with “/”:



Labor Code Maintenance (SMD) 1/31/2017

Labor Code:

Description:

Skill Code Administrative

Job Code: Installation Labor

Sales Account: Software costs (net)

Tax Class: Taxable

Labor Cost: Retainer Factor:

Billing Rate: Overtime Factor:

Regular Earnings: Regular

Overtime Earnings: Doubletime

Skill Codes are used to specify to which Skill Code group this labor code belongs. A single Skill Code can include any number of individual labor codes. Using the **Skill Code** during Dispatch Data Entry can reduce confusion and speed up your data entry.

Job Codes are used when posting labor charges to the contract file.

Sales Account is used for postings when closing dispatches with labor (based on the priority in **Service Management Options**).

Labor Cost is used for posting cost to contracts for transactions generated when closing dispatches with labor (based on billing rate calculation).

Billing Rate is the billing rates for labor items subject to contract settings or the billing rate calculation priority set-up in **Service Management Options**.

Select the **Regular** and **Overtime Earnings Codes** from the **Earnings List**. Earnings Codes are set in the **Earnings Code Maintenance** under the **Payroll Setup** menu.

The **Retainer Factor** is used when calculating used hours from the contract hours.

The **Overtime Factor** is used for calculation of hours during Labor lines entry for the hours out of the coverage period defined by the **Coverage Code** of the task.

Tax Class will be used in the Dispatch by default, if the Task's **Ship To Address** has **Calculate taxes on Labor** checked and the **Calculate taxes on Labor** option is not set to **No** in **Service Management Options**. If the Labor Presenting item is generated anew during dispatch closing, this **Tax Class** will be set for it.

Clicking the **COGS G/L** button opens the **Cost Of Goods Sold** screen, where you can specify account to be used for the labor items generated from the selected Labor during dispatch closing into Sales Orders or Invoices.



Different G/L accounts can be set for different **Product Lines** and for all the Product Lines (empty Product Line) not having separate accounts specified.

The account specified for the **Product Line** set in the **Service Management Options** will be used for the generated inventory items.

If there is no account set for that Product Line, the program uses the account set **without Product Line**.

Technician Code Maintenance

The **Technician Code Maintenance** program is used to setup technician codes used in the **Service Management** Module.

The **Technician Code Maintenance** program is used to enter technicians' qualifications using a set of skill codes and a performance evaluation level (0 to 9) for each skill.

Dispatch Entry uses skill information taken from **Technician Code Maintenance** to match skill requirements with a list of available personnel. This returns a list showing only the qualified personnel available to perform the task.

Technician Code Maintenance (SMD) 1/31/2017

Technician Code: ADAM
Last Name: Adams
First Name: Arnold
Delivery: ☐

Labor Cost: 20.00
Billing Rate: 55.00
Territory Code: ARIZON
Sales Account: 115-00-0200
E-mail Address:
Employee No.: 11-0000100
J/C Cost Code Segment Value: 010
Whse Code: 000
Active: ☒

Quick Dispatch Entry Settings
Set Focus to Field: Labor/Skill Code
No Messages: ☐
No Auto Budgeting: ☐

Text Message
E-mail Address:

Buttons: Accept, Cancel, Delete, Skills...

Enter new **Technician Code** to add or an existing one to modify data.

Enter the **Last** and **First Names** and **E-mail Address** of the technician in the appropriate fields.

Use the **Labor Cost** field and the **Billing Rate** field to enter hourly cost and price information for a given Technician Code.

Enter the **Territory Code** for the area covered by the technician. The code must have been previously entered in the **Territory Code Maintenance** screen. This code is used to search for Tasks and Dispatches elsewhere in the system.

Sales Acct is used for postings when closing dispatches with labor (based on the priority in **Service Management Options**).

Employee Number sets the connection between the Technician Code and Employee Number used in the **Payroll** module.

The **J/C Cost Code Segment Value** is used during the import in the **Job Posting Entry**, to substitute the **J/C Cost Code Seg. for Tech Posting** specified in the **Service Management Options**.

Select a **Whse Code** to be used as default for current Technician in the Dispatch Line Entry program upon entering new line.

Check the **Overtime Exception** box to denote that workday for this technician equals to 10 hours instead of usual 8.

Clear the **Active** check box, if the **Technician** is not available for assigning dispatches. The Technicians with the **Active** option turned off cannot be selected anywhere for new Tasks and Dispatches. Existing Task and Dispatches of the inactive technician can be still processed.

The **Quick Dispatch Entry Settings** allows the user to define the settings to be defaulted to the **Quick Dispatch Line Entry**.

Set Focus to Field is used to set starting point for information entry. This starting field is set separately for each technician. The focus will be set to the specified field next time you select that technician in the **Quick Dispatch Line Entry**.

Check the **No Messages** box to suppress displaying information and warning messages and memos when selecting Dispatch Lines.

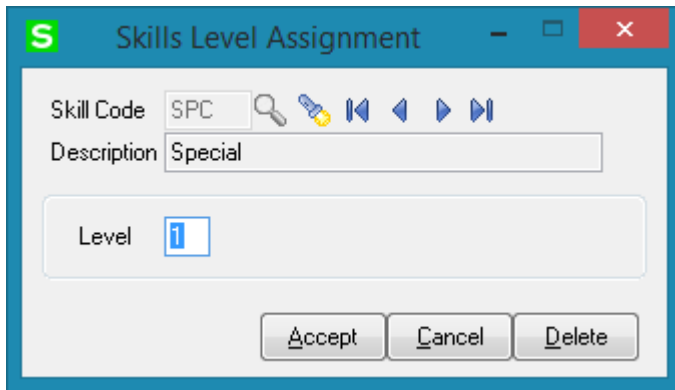
The setting of the **No Messages** box is stored for each Technician Code separately.

Check the **No Auto Budgeting** box to suppress the prompt about creating Budgeting Line when entering new line in the **Quick Dispatch Line Entry**.

Those settings can be also defined/changed in the **Quick Dispatch Line Entry**.

Press the **Skills** button to submit the technician qualification information using the existing skills defined in the **Skill Code Maintenance** program.

The following screen will appear.



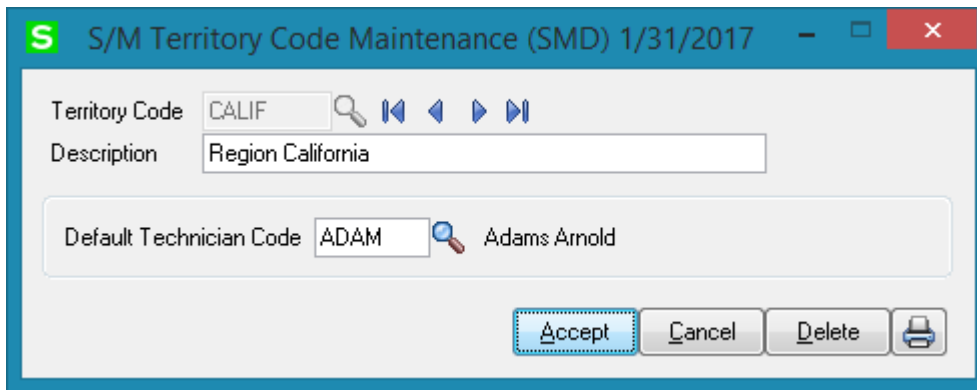
The image shows a software dialog box titled "Skills Level Assignment". It has a blue header bar with a green "S" icon on the left and standard window controls (minimize, maximize, close) on the right. The main area is white and contains three input fields: "Skill Code" with the value "SPC", "Description" with the value "Special", and "Level" with a blue square icon containing the letter "i". To the right of the "Skill Code" field are several small icons: a magnifying glass, a key, and four arrows (two pointing left, two pointing right). At the bottom of the dialog are three buttons: "Accept", "Cancel", and "Delete".

Enter the desired **Skill Code** for the technician.

Enter the **Skill Level Number** representing the technical expertise required for satisfactory task completion. Skill level can be from 0 to 9.

Territory Code Maintenance

The technician code specified in the **Default Technician Code** field of **Territory Code Maintenance** is the default technician for current territory.



The screenshot shows a software window titled "S/M Territory Code Maintenance (SMD) 1/31/2017". Inside the window, there are three main input fields: "Territory Code" with the value "CALIF", "Description" with the value "Region California", and "Default Technician Code" with the value "ADAM". To the right of "ADAM" is a magnifying glass icon and the text "Adams Arnold". Below these fields are four buttons: "Accept", "Cancel", "Delete", and a printer icon.

The **Territory Code** can then be used as a selection criterion in the **Technician Maintenance**, **Customer Maintenance**, **Ship to Maintenance**, **Task Data Entry**, **Dispatch Board** and some other programs in order to match technicians and task job sites with the **Territory Code**.

Task Type Maintenance

The **Task Type Maintenance** program is used to maintain task type codes.

The screenshot shows the 'Task Type Maintenance (SMD) 1/31/2017' window. It features a search bar at the top with a magnifying glass icon and navigation buttons. The 'Type Code' field is empty, and the 'Description' field contains 'Installation'. The 'Delivery Task Type' checkbox is unchecked. The 'Create Additional Tasks' checkbox is checked, and there is an 'Additional Tasks...' button. The 'Sales Account' field contains '111-00-0000' with a magnifying glass icon and a link to 'Other Receivables'. Below this is a list of files: File 1 (D:\MAS\MAS2017\SMP\MAS90\Images\Category.gif), File 2 (D:\MAS\MAS2017\SMP\MAS90\Images\MAIL.GIF), File 3 (empty), File 4 (empty), and File 5 (empty). Each file entry has a small icon to its right. At the bottom are buttons for 'Accept', 'Cancel', 'Delete', and a printer icon.

The **Delivery Task Type** is intended for indicating the Task types to be loaded to mobile application.

Sales Acct is used for postings when closing dispatches with labor (based on the priority in **Service Management Options**).

Enter the **Type Code** and check the **Create Additional Tasks** box to have the program create records for the additional tasks. The tasks will be generated at the moment you're accepting a new task of this type in the **Task Data Entry**.

If you delete all the additional tasks in the list, and close the **Create Additional Tasks** screen, the check box in the **Task Type Maintenance** will be automatically cleared. You must check it anew and click the button, if you want to add tasks after that.

Here is the **Create Additional Tasks** screen with 3 tasks selected to be generated additionally for current Task.

	Type Code	Type Code Description	Description	Nature of Task
1	S	Service Call	Network Administration	PROGRAM
2	S	Service Call	Programming	PROJECT
3	P	Support Call	Implementation	WARRANTY
4	S	Service Call	Training	PROJECT
5				

For each Task Type you may select up to 5 files to be copied to the Task Documents Path. The files specified here will be automatically copied to the Task's **Documents Path** upon changing the Task Type in the **Task Data Entry**.

Nature of Task Maintenance

The **Nature of Task Maintenance** program is used to maintain, edit and add Nature of Task codes used in the **Service Management** Module. This program can also be used to list the skills required to perform these tasks, in order to match the task to a technician.

The screenshot shows the 'Nature of Task Maintenance (SMD) 1/31/2017' window. It features a top bar with a green 'S' icon and window controls. Below the bar, there are several input fields and buttons. The 'Type Code' field has a search icon and navigation arrows. The 'Description' field contains the text 'Installation'. To the right is a 'Required Skills...' button. Below these is a section with a 'Nature of Task' field (containing 'PROGRAM' and a search icon) and a text field 'Install Program'. The 'Sales Account' field contains '165-00-0000' and a search icon, with a dropdown menu showing 'Office and computer equipment'. The 'Technician Code' field contains 'ADAM' and a search icon, with a dropdown menu showing 'Adams Arnold'. Below these are five 'Question' fields: 'Question 1' (Confirm to:), 'Question 2' (Install on all workstations?), 'Question 3' (Order taken by:), 'Question 4' (empty), and 'Question 5' (empty). The 'Task Form Code' field contains 'STANDARD' and a search icon, with a dropdown menu showing 'Task Quick Print'. At the bottom right are 'Accept', 'Cancel', 'Delete', and a printer icon.

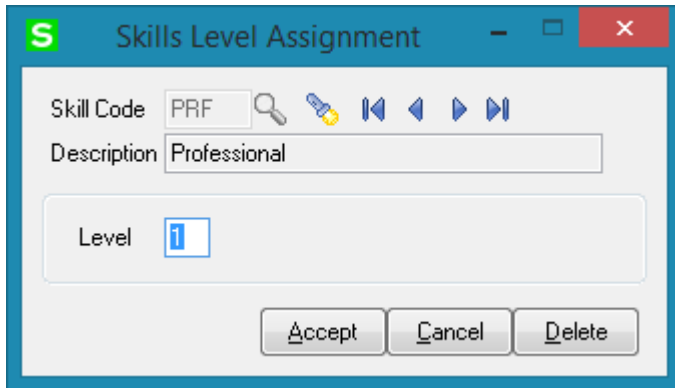
Enter **Task Type** or select it from the lookup for the Nature of the Task you wish to maintain.

Enter the desired **Nature of Task** code to add or maintain and a **Description** for the Nature of Task.

Sales Acct is used for postings when closing dispatches with labor (based on the priority in the **Service Management Options**).

Select the **Technician Code** to be loaded by default when selecting the **Nature of Task**.

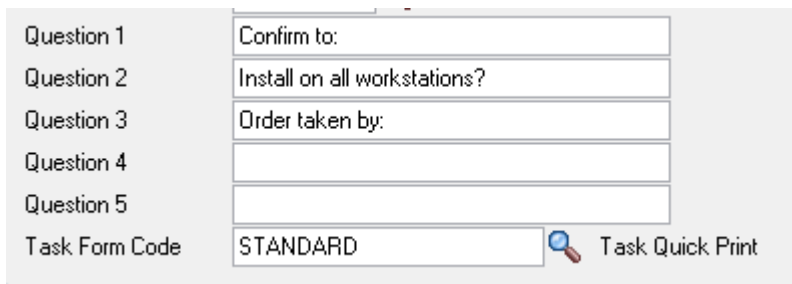
Use the **Required Skills** button on the **Nature of Task Maintenance** screen to open the **Skills Level Assignment** screen. Use this screen to specify the list of skills needed for the assigned tasks.



The image shows a Windows-style dialog box titled "Skills Level Assignment". It has a blue header bar with a green "S" icon. The dialog contains the following fields and controls:


- Skill Code:** A text field containing "PRF" with a search icon and a dropdown arrow.
- Description:** A text field containing "Professional".
- Level:** A text field containing "1" with a dropdown arrow.
- Buttons:** "Accept", "Cancel", and "Delete" buttons at the bottom.

Question1 to 5 editable text fields are intended for entry of questions tied to current Nature of Task. When creating Task the user will be able to enter the answers to those questions in respective fields added on the Nature of Task Answers screen launched from the [Task Data Entry](#).



The image shows a screen with five questions and a task form code field. The questions are listed on the left, and the answers are in text fields on the right.

Question	Answer
Question 1	Confirm to:
Question 2	Install on all workstations?
Question 3	Order taken by:
Question 4	
Question 5	

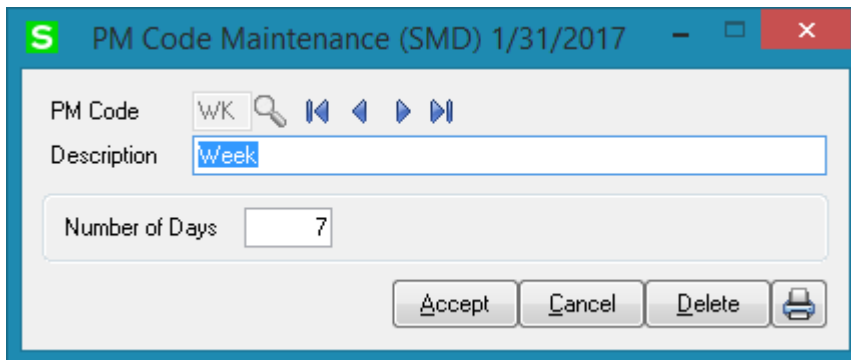
Task Form Code: STANDARD  Task Quick Print

Task Form Code allows for specifying the Task Quick Print form. The specified form will be used by default in the Task Quick Print for current Type Code and Nature of Code pair.

PM Code Maintenance

The **PM Code Maintenance** is used to maintain, edit and add PM (Preventive Maintenance) codes used in the **Service Management Module**.

The **PM Code** can be assigned to a preventive maintenance contract entered in **Contract Maintenance**. The system will then use the number of days associated with the PM Code to automatically generate a preventive maintenance task at the appropriate time, when the **Auto Generate Task Selection** program is run.



PM Code Maintenance (SMD) 1/31/2017

PM Code: WK

Description: Week

Number of Days: 7

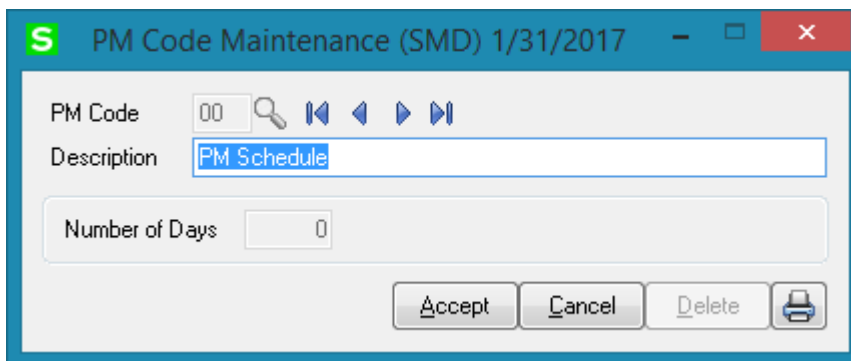
Accept Cancel Delete

Enter the desired **PM Code** you wish to setup or maintain.

Use the **Description** field to enter or maintain the description for specific PM Code. The description field supports up to thirty characters.

Use the **Number of Days** field to enter the frequency (in days) based on which the maintenance task should be performed.

“00” PM Code is automatically added once the PM Code Maintenance is accepted. It is used for PM scheduling in the Contract Entry.



PM Code Maintenance (SMD) 1/31/2017

PM Code: 00

Description: PM Schedule

Number of Days: 0

Accept Cancel Delete

Routing Maintenance

Routing Maintenance is a program that allows entry of repair tasks to be performed on a given item, or for entry of tasks required to install an item that has been sold. For the system to generate the tasks listed in the routing for the repair or installation of an item, the item must be entered in **Bill of Materials Maintenance** along with the desired **Routing Number**.

The term “Routing” is used in this case to describe the total set of steps, of any kind, taken to complete a dispatch or task. “Routing” can be any kind of alphanumeric information, as well as the commonly understood repair and installation instructions.

Step No.	Description	Req. Hours	Gen. Task	Task Type	Nature Of Task	Mfg	Labor/Skill Code	Tech. Code
1	Contact ASP	1.00	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
2	Install driver at ASP	3.00	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
3	Manufacturing step	3.00	<input checked="" type="checkbox"/>	S	REPAIR	<input checked="" type="checkbox"/>	MAKING	DAVI
4		.00	<input type="checkbox"/>			<input type="checkbox"/>		

Enter the **Routing Number** that represents the series of steps to be performed in completing a repair or an installation.

Enter the **Description** (effectively, the name) of the routing in this field. You may use up to thirty characters for the description.

Enter the number of the step you wish to add or maintain in the **Step Number** field. Use the **Next Number** icon to accept the next automatically incremented step number.

If the **Step Number** represented by the next incremented value already exists, then the difference between the current step number and the step represented by the multiple will be divided by two.

If you are entering the first step number for a new routing, clicking the **Next Number** icon will insert **Step Number 0010** automatically.

Enter the **Step Description**. You may use as many characters as you wish to describe each step in the routing. The **Step Text Maintenance** window will appear when you exceed the initial thirty-character count.

During normal use of this screen, only the first thirty characters will be shown in the **Step Description** field.

Press the **Step Extended Description** button to open the **Step Text Maintenance** window. If an extended description has been entered for a step, the button's color is changed.

Enter the **Required Hours** planned to complete this step.

	Step No.	Description	Req. Hours	Gen. Task	Task Type	Nature Of Task	Mfg	Labor/Skill Code	Tech. Code
1	0010	Contact ASP	1.00	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
2	0020	Installation of driver at ASP	3.00	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
3	0030	Manufacturing step	3.00	<input checked="" type="checkbox"/>	S	REPAIR	<input checked="" type="checkbox"/>	MAKING	DAVI
4			.00	<input type="checkbox"/>			<input type="checkbox"/>		

Select the **Gen. Task** box to mark the step as a task, which can be dispatched when an item with this routing is sold or needs repairing.

If the **Generate Task** box is checked, select a **Task Type** describing the task. This will be transferred automatically to the generated task, and can be used for assigning a technician with the skills appropriate for completing the task.

If the **Generate Task** box is checked, enter a **Nature of Task** describing the task. You can click the **Lookup** button and select it from the list, which changes based on the Task Type. This will be transferred automatically to the generated task.

The **Mfg (Manufacturing)** check box is available only for Steps with the **Generate Task** option selected.

If the **Mfg** box is selected for a **Step**, the **Labor/Skill Code** and **Technician Code** fields become visible enabling selection for that Step.

For **Manufacturing** Step, Dispatch with Labor Charge line will be generated when generating Task, using the specified **Labor/Skill** and **Technician** Codes.

Task/Dispatch Status Maintenance

The **Task/Dispatch Status Maintenance** program is used to maintain task/dispatch status codes, which are used to display the current status of tasks and dispatches. For example, task can be opened or closed, entered or waiting for a receipt.

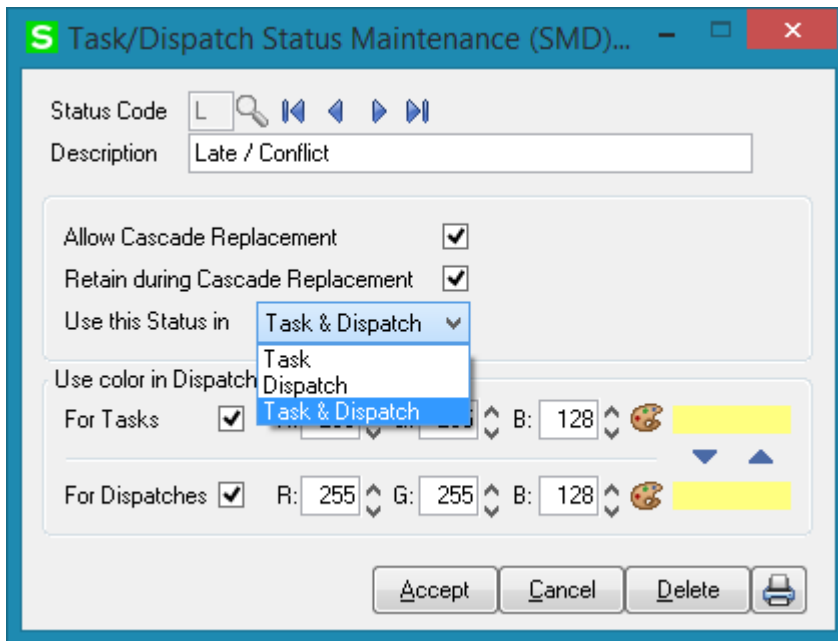
The screenshot shows the 'Task/Dispatch Status Maintenance (SMD)' window. It has a title bar with a green 'S' icon. The main area contains the following elements:

- Status Code:** A text box with 'C' and a search icon.
- Description:** A text box with 'Closed'.
- Allow Cascade Replacement:** A checkbox that is currently unchecked.
- Retain during Cascade Replacement:** A checkbox that is currently unchecked.
- Use this Status in:** A dropdown menu showing 'Task & Dispatch'.
- Use color in Dispatch Board:** A section with two rows of color selection controls.
 - For Tasks:** A checked checkbox, followed by RGB values (R: 32, G: 32, B: 232) and a color swatch.
 - For Dispatches:** A checked checkbox, followed by RGB values (R: 163, G: 191, B: 222) and a color swatch.
- Buttons:** 'Accept', 'Cancel', 'Delete', and a printer icon at the bottom right.

Check the **Allow Cascade Replacement** box if you want to have the selected Status applied to all Dispatches associated with the task when applying it to the Task. This checkbox is disabled if the **Use this Status in** option is set to **Dispatch**.

Check the **Retain during Cascade Replacement** box if you want the Status to be retained for the Dispatches while applying the cascade replacement to the Task. This checkbox is disabled if the **Use this Status in** option is set to **Task**.

The user can select the status to be used only in the **Task**, **Dispatch** or both in **Task and Dispatch**.



Through the **Status Code** Lookup button the **Task/Dispatch Status List** is opened. There are several standard Status Codes that are always present in this list. Those Status Codes are set in the system upon Service Management Module setup. Besides them you can add new codes for your special needs, delete them and modify their settings. However, the standard Status Codes cannot be deleted. For those codes Yes is displayed in the Necessary column of the **Task/Dispatch Status List**.

Status Code	Description	Use this Status in	Necessary
A	Approved	Task & Dispatch	No
C	Closed	Task & Dispatch	Yes
D	Done	Task & Dispatch	No
E	Entered	Task & Dispatch	Yes
H	Hold A/R	Task & Dispatch	Yes
L	Late / Conflict	Task & Dispatch	No
O	Open	Task & Dispatch	Yes
P	Waiting Permit	Task & Dispatch	No
R	Reservation	Task & Dispatch	No
U	Updated Rcpt.	Task & Dispatch	Yes
W	Wait. for Rcpt.	Task & Dispatch	Yes
Z	Completed Disp	Task & Dispatch	No

Search: Status Code ▼ Begins with ▼ Find

Filters...

Custom... Lookup Wizard...

Select Cancel

Found 12 records

Check the **Use color for Tasks/Dispatches in [Dispatch Board](#)** box, to display Color Bars for statuses of Tasks or Dispatches, correspondingly.

When the box is checked, the color selection fields become enabled. You can enter RGB of the color, or click the **Lookup Colors** icon to select color in the standard Windows **Color** dialog box.

The previews display currently selected colors. You can use the arrows to easily copy one of the selected colors to the other.

The **Task** and **Dispatch** colors are displayed also in the **Task/Dispatch Status Listing** report.

Task/Dispatch Status Listing

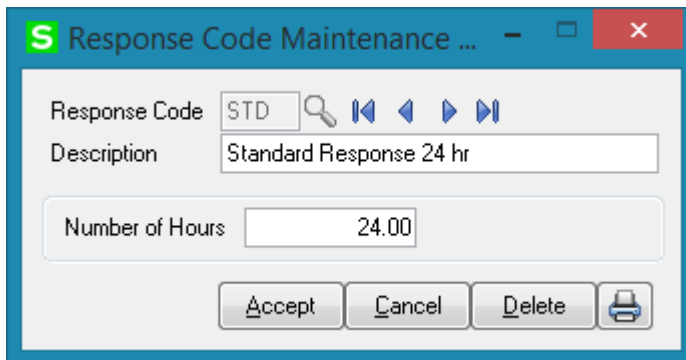
SM demo Comapny (SMD)

Status Code	Description	Cascade Allow	Replacement Retain during	Use this Status in	Dispatch Task Color	Board Dispatch Color
A	Approved	No	No	Task & Dispatch		
C	Closed	No	No	Task & Dispatch		
D	Done	No	No	Task & Dispatch		
E	Entered	Yes	Yes	Task & Dispatch		
H	Hold A/R	No	No	Task & Dispatch		
L	Late / Conflict	Yes	Yes	Task & Dispatch		
O	Open	No	No	Task & Dispatch		
P	Waiting Permit	Yes	Yes	Task & Dispatch		
R	Reservation	No	No	Task & Dispatch		
U	Updated Rcpt.	Yes	Yes	Task & Dispatch		
W	Wait. for Rcpt.	Yes	Yes	Task & Dispatch		
Z	Completed Disp	No	No	Task & Dispatch		

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

Response Code Maintenance

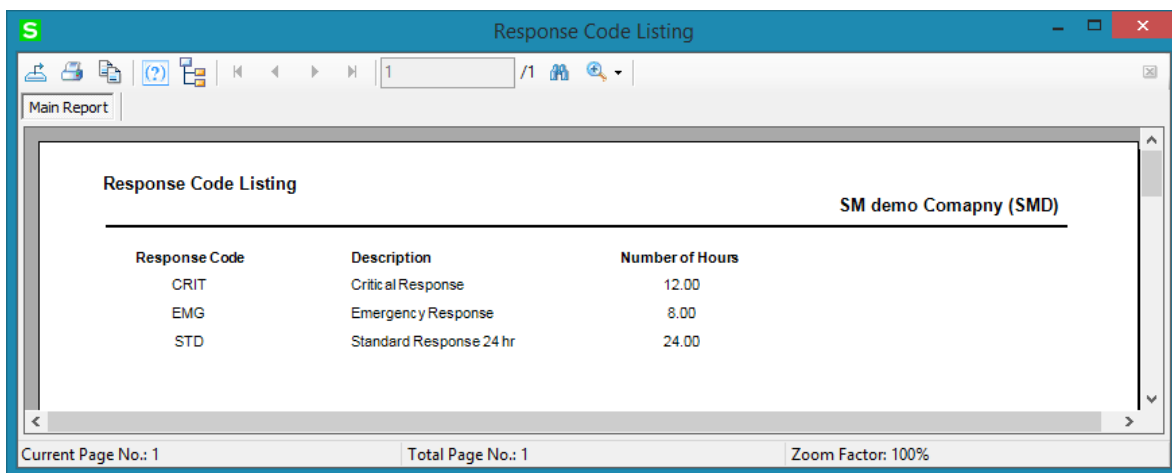
The **Response Code Maintenance** allows entry of **Number of Hours** for each Response Code.



The screenshot shows a dialog box titled "Response Code Maintenance ...". It contains the following fields and controls:

- Response Code:** A text box containing "STD" with a search icon and navigation arrows.
- Description:** A text box containing "Standard Response 24 hr".
- Number of Hours:** A text box containing "24.00".
- Buttons:** "Accept", "Cancel", "Delete", and a print icon.

Print button allows for printing the list of Response Codes setup in the system:



The screenshot shows a report window titled "Response Code Listing". The report displays a table of response codes and their associated hours. The report is for "SM demo Comapny (SMD)".

Response Code	Description	Number of Hours
CRIT	Critical Response	12.00
EMG	Emergency Response	8.00
STD	Standard Response 24 hr	24.00

At the bottom of the report window, the following information is displayed:

- Current Page No.: 1
- Total Page No.: 1
- Zoom Factor: 100%

Coverage Code Maintenance

The **Coverage Code Maintenance** allows entry of coverage hours for each day of the week. Each Coverage Code can be specified as **Workdays Only** or not.

Workdays Only <input checked="" type="checkbox"/>		
Monday	9:00AM	8:00PM
Tuesday	9:00AM	8:00PM
Wednesday	9:00AM	8:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	6:00PM
Saturday	12:00AM	12:00AM
Sunday	12:00AM	12:00AM

Clicking the **Calendar** button displays the **Working Days Maintenance** screen, where you can specify the Workdays and Holidays.

Year 2017

Quick Row 2

	Day	Description	Work Day
1	1/1/2017	New Year	<input type="checkbox"/>
2	1/18/2017	Martin Luther King, Jr. Day	<input checked="" type="checkbox"/>
3	2/15/2017	Presidents Day	<input type="checkbox"/>
4			<input type="checkbox"/>

Workday Count 21 x 8 hours = 168

Accept Cancel Delete

The **Work Days Only** option allows the user to include only workdays when calculating the Due Date/Time of the Task.

The Workday Count displays the number of working days in the month of the selected date.

Memo Manager Maintenance

The **Memo Manager Maintenance** program allows setting Memo Options for Service Management module to be shown/ maintained in the selected Tasks.

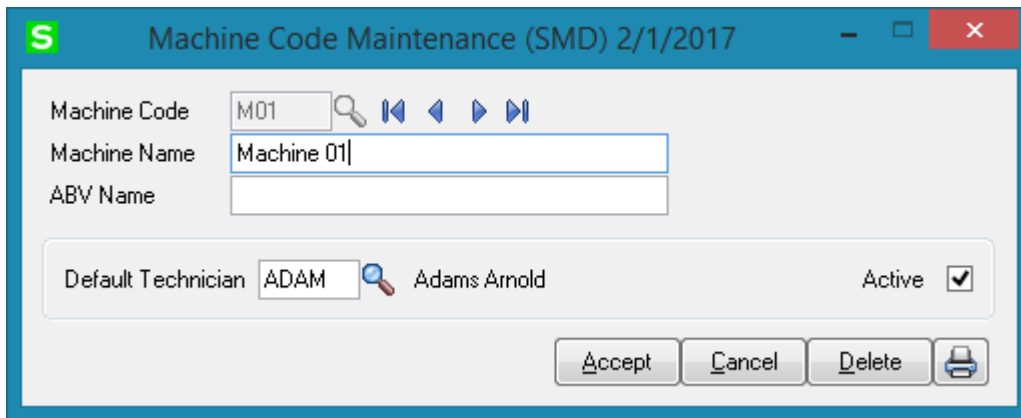
Module: Service Management
Memo Type: Contract No
Role: Admin

	Task	Memo Options	Auto Display
1	AP Invoice Data Entry	Show	<input checked="" type="checkbox"/>
2	Job Masterfile Maintenance	Show	<input checked="" type="checkbox"/>
3	Job Masterfile Inquiry	Show	<input checked="" type="checkbox"/>
4	RMA Inquiry	Show	<input checked="" type="checkbox"/>
5	RMA Receipts Entry	Show	<input checked="" type="checkbox"/>
6	RMA Data Entry	Maintain	<input checked="" type="checkbox"/>
7	Contract Data Entry	Maintain	<input checked="" type="checkbox"/>
8	Task History Inquiry	Maintain	<input checked="" type="checkbox"/>
9	Task Data Inquiry	Show	<input checked="" type="checkbox"/>

Buttons: Accept, Cancel, Print, Help

Machine Code Maintenance

The **Machine Code Maintenance** program is used to setup machine with respective Default Technician. The Machine Code setup here is used when generating manufacturing Task/Dispatch by the **Calculate Quantity to Produce/Purchase** program.



Machine Code Maintenance (SMD) 2/1/2017


Machine Code: M01

Machine Name: Machine 01

ABV Name:

Default Technician: ADAM Adams Arnold

Active: ☒

Accept Cancel Delete 

The Lookup button lists all Machine codes setup in the system:

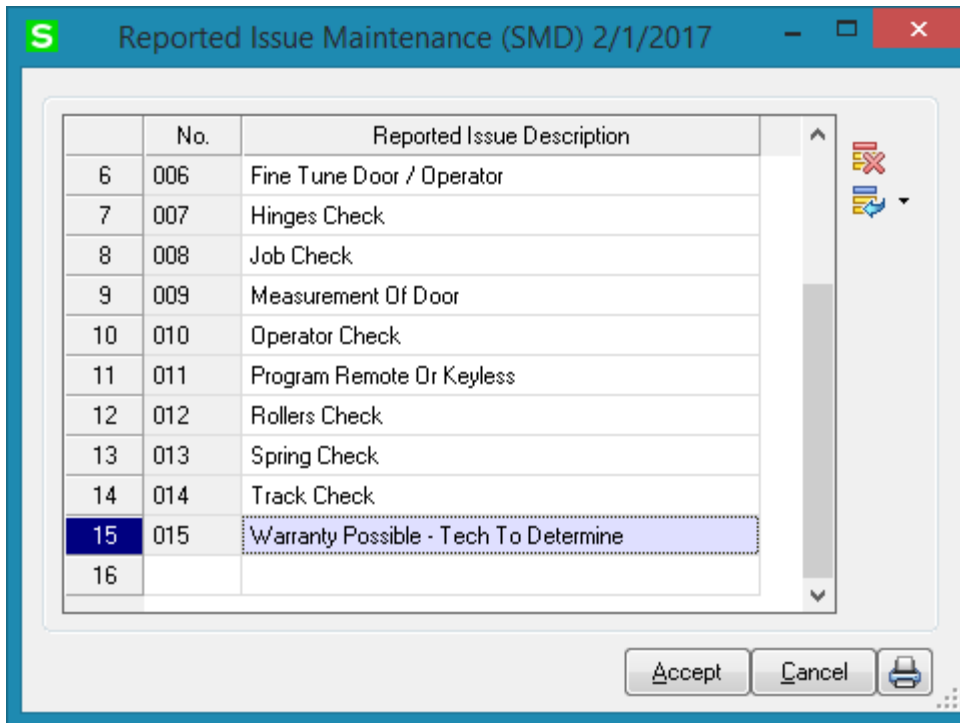
The screenshot shows a software window titled "Machine Code List". It contains a table with the following data:

Machine Code	Machine Name	ABV Name
M01	Machine 01	
M02	Machine 02	

Below the table, there is a search section with a "Search" dropdown menu set to "<default>" and a "Find" button. To the left of the "Find" button is a "Filters..." button. Below these are two buttons: "Custom..." and "Lookup Wizard...". To the right of these are four buttons: "Select", "Cancel", a green checkmark icon, and a printer icon. At the bottom left, a status bar indicates "Found 2 records".

Reported Issue Maintenance

The **Reported Issue Maintenance** has been added under the **Service Management Setup** menu to allow setup of Issue numbers with respective Description to be loaded into the Reported Issue drop down list added in the **Task Text Maintenance**.



	No.	Reported Issue Description
6	006	Fine Tune Door / Operator
7	007	Hinges Check
8	008	Job Check
9	009	Measurement Of Door
10	010	Operator Check
11	011	Program Remote Or Keyless
12	012	Rollers Check
13	013	Spring Check
14	014	Track Check
15	015	Warranty Possible - Tech To Determine
16		

Task Text Maintenance

Task No: 0000946 Cabinet Work / holes

Cabinet Work / holes

Reported Issue:
Appointment For Sales Call
Belt / Drive Chain Check
Cable Check
Door Check

Time Stamp OK Cancel ?

Crew Maintenance

The **Crew Maintenance** program has been added under the **Service Management Setup** menu to allow grouping service technicians, defined in the **Technician Code Maintenance**, into service crews.

Crew Maintenance (SMD) 5/30/2017

Crew Number 🔍 ⏪ ⏩ ⏴ ⏵

Description

Crew Leader 🔍

Skill Code 🔍

Territory Code 🔍

Tech. Code	Last Name	First Name
------------	-----------	------------

Assign ➡

⬅ Drop

Accept Cancel Delete 🖨

Crew Number

Enter the crew number for the group of technicians in the service crew to add or maintain, or click the Lookup button to list all service crews.

Description

Type the crew description for the service crew.

Select the **Crew Leader** from the list of Technicians setup in the system. The **Crew Leader** field cannot be blank. It is required entry.

Leave the territory and skill code fields blank to load all technicians into the available technicians list.

Crew Maintenance (SMD) 5/30/2017

Crew Number: CR01
Description: Crew#01
Crew Leader: ADAM (Adams Arnold)
Skill Code:
Territory Code:
Assign
Drop

Tech. Code	Last Name	First Name
ADAM	Adams	Arnold
BRN	Brown	John
DAVI	Davis	Arnold
DIX	Dixon	Michael
HILL	Hill	Andre
NEW	Newman	Paul
ROBI	Robinson	Christohper
SANT	Santana	Juan
WILL	Williams	Allen
WILS	Wilson	James

Accept Cancel Delete

Specify the **Skill Code** and **Territory Code** for current Crew to load the technicians filtered by the specified Territory and Skill Code.

Upon specifying the Skill Code and Territory Code all the technicians having the specified skill and territory codes assigned are loaded into the technician list on the left of the screen.

Crew Maintenance (SMD) 5/30/2017

Crew Number: CR01
Description: Crew#01

Crew Leader: ADAM (Adams Arnold)
Skill Code: STD (Standard)
Territory Code: NORTH (Region North)

Tech. Code	Last Name	First Name
WILL	Williams	Allen
WILS	Wilson	James

Tech. Code	Last Name	First Name
------------	-----------	------------

Assign
Drop

Accept Cancel Delete

Select a Technician and click Assign button to include the Technician in the current Crew. The Drop button allows removing a Technician from the crew. An existing crew can be maintained at any time. Technicians can be added and removed from the crew, as required.

Crew Maintenance (SMD) 5/30/2017

Crew Number: CR01
Description: Crew#01

Crew Leader: ADAM (Adams Arnold)
Skill Code: STD (Standard)
Territory Code: NORTH (Region North)

Tech. Code	Last Name	First Name
------------	-----------	------------

Assign

Drop

Tech. Code	Last Name	First Name
WILL	Williams	Allen
WILS	Wilson	James

Accept Cancel Delete Print

The Technician code added to the crew will be displayed in red if for some reason the Territory/Skill of the Technician has been changed. Dropping such Technician code will remove it from the crew.

Crew Maintenance (SMD) 5/30/2017

Crew Number: CR01
Description: Crew#01

Crew Leader: ADAM (Adams Arnold)
Skill Code: STD (Standard)
Territory Code: NORTH (Region North)

Tech. Code	Last Name	First Name
------------	-----------	------------

Assign


Drop

Tech. Code	Last Name	First Name
WILL	Williams	Allen
WILS	Wilson	James

Accept Cancel Delete Print

Press **Print** button to print the Crew listing. The report can be printed sorted either by Crew Number or by Crew Leader.

S Crew Listing (SMD) 5/30/2017

Report Setting: STANDARD  Save

Description: Crew Listing

Setting Options

Type: Public ☐ Print Report Settings ☐ Number of Copies: 1 ☐

Default Report: ☒ Three Hole Punch ☐ Collated ☒

Sort Report By: Crew Leader ☐ Crew Number ☐ Crew Leader ☒

Selections

Select Field	Operand	Value
Crew Number	All	
Crew Leader	All	

Adobe PDF ☐ Keep Window Open After Print ☐ Preview ☐ Print Preview Setup

S Crew Listing

Main Report

Crew Listing
Sorted by Crew Number

SM demo Company (SMD)

Technician

Crew Number: CR02 Crew Leader: DAVI Davis Arnold

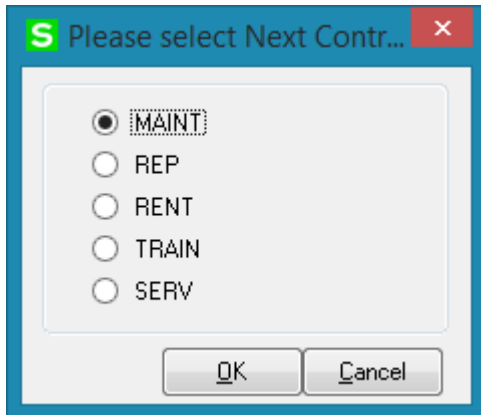
ADAM Adams Arnold
BRN Brown John
DAVI Davis Arnold

Current Page No.: 2 Total Page No.: 2 Zoom Factor: 100%

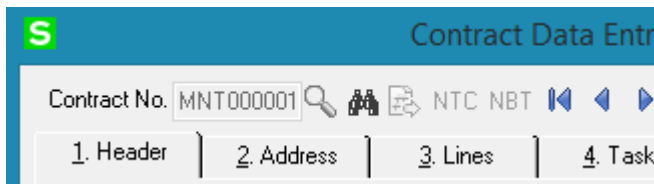
customer who purchases that item. A template contract number starts with “T”. (You can enter the number starting with “T” manually, to create Template Contract.)

The **Credit** button allows launching the **Customer Credit History** screen. Here you can briefly review customers’ credit history.

Use the **NBT** button to assign Next Contract number by the **Contract Type**. Upon pressing **NBT** button a dialogue is opened with the list of Contract types setup in the Service Management Options:



Select the **Contract type** and press OK. The next Contract number setup for current Contract type in the Service Management will be assigned to a new Contract.



The **Customer** button enables access to the **Customer Maintenance**.

By default, the system assigns the SM module current accounting date to the **Contract Date** field. Enter any other desired contract entry date.

You may enter the Contract Number you want to add or maintain manually by typing it into the **Contract Number** field.

Note: Don't enter numbers starting with "T", since system treats them as Template Contracts!

Click the **Memo** button to view, create, or maintain memos. The Memo button is available only if the appropriate memo type has been set up in Memo Manager Maintenance for this task. If a memo already exists for this task, the Memo button appears yellow. If a memo does not exist, the Memo button appears blue

Header Tab

Enter the **Customer Number** for the current contract. If this is a template contract, it doesn't matter which customer number you enter. When the actual contract is generated from the template, the system will automatically create it for the actual customer.

Click the **Customer Memo** button to select Memo for current customer.

Enter the **Description** of the contract. The program allows you to enter an extended description.

Contract Data Entry (SMD) 2/1/2017

Contract No. 000000191

Contract Date 1/25/2017

Customer No. 01-ABF American Business Futures

Contract Type Prev. Maint.

Contract Status New

Start Date 1/25/2017

End Date 1/26/2018

Billing Type Time and Material

Generation

Document None

Contract Amount From Header

Bill Freq Code

Job Site Code 2 American Business Futures

Confirm To John Quinn

Comment

Fax No.

E-mail artie@abf.com

PM Code Q Quarterly

Number of Days 90 Last Task Gen. Date

TaskType

Nature of Task

Total Fixed Hours 0 Used Hours 0:00

Documents Path \\Gohar\d\MAS\MAS2017\SMP\MAS90\Dc

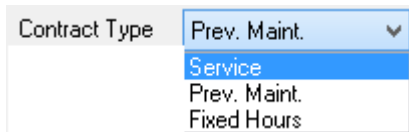
Route

Total Amount 900.00

Quick Print Generation Copy From... Accept Cancel Delete

By default, the system assigns current accounting date to both the **Contract Start** and **Contract End Dates** and the user is allowed to change the dates as required.

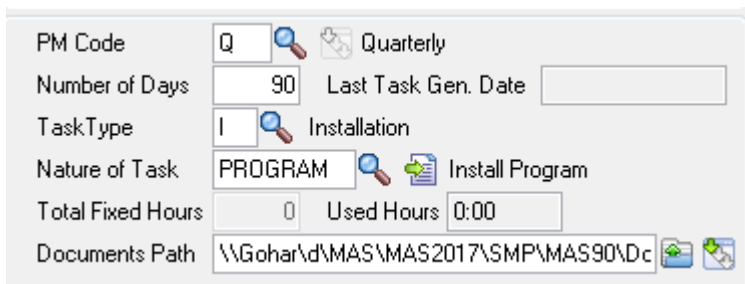
Contract Type: Select a Contract type



A dropdown menu for 'Contract Type'. The selected option is 'Prev. Maint.'. Other visible options are 'Service', 'Prev. Maint.', and 'Fixed Hours'.

Based on the selected contract type respective fields are enabled on the Contract Data Entry.

If **Prev. Maintenance (Preventive Maintenance)** type is selected, the PM Code entry is required. Enter the PM Code to set the frequency for the preventive maintenance tasks to be performed. Based on the specified **PM Code**, the system will display the **Number of Days** for a **PM Period**. The system will then use the **Number of Days** and the **Last Task Generated Date** fields to automatically generate a preventive maintenance task with the scheduled time set to the appropriate time, when the **Auto Generate Task Selection** program is run. Select the **Task Type** and **Nature of Task** to be assigned to the tasks being generated.

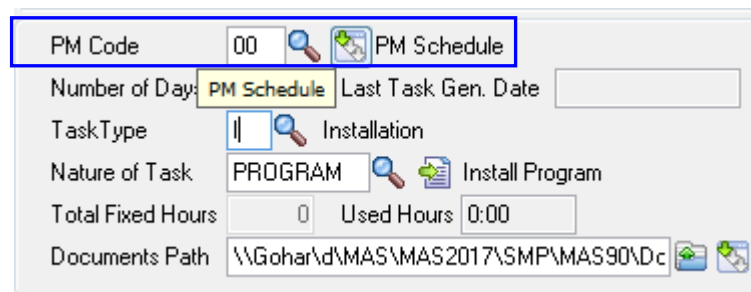


A screenshot of the 'Contract Data Entry' form. The 'PM Code' field contains 'Q' and has a 'Quarterly' button. The 'Number of Days' field contains '90'. The 'Task Type' field contains 'I' and has an 'Installation' button. The 'Nature of Task' field contains 'PROGRAM' and has an 'Install Program' button. The 'Total Fixed Hours' field contains '0' and the 'Used Hours' field contains '0:00'. The 'Documents Path' field contains '\\Gohar\d\MAS\MAS2017\SMP\MAS90\Dc'.

PM Schedule

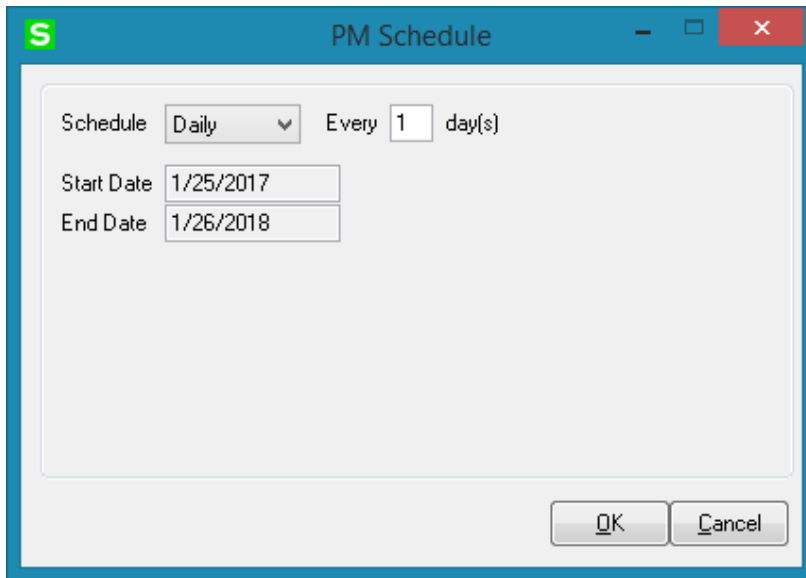
“00” PM Code is automatically created in the system once the PM Code Maintenance is run.

The **PM Schedule** button is available only for “00” PM Code to allow scheduling PM tasks being generated.



A screenshot of the 'Contract Data Entry' form with the 'PM Code' field set to '00'. A red box highlights the 'PM Code' field and the 'PM Schedule' button. The 'Number of Days' field contains 'PM Schedule'. The 'Task Type' field contains 'I' and has an 'Installation' button. The 'Nature of Task' field contains 'PROGRAM' and has an 'Install Program' button. The 'Total Fixed Hours' field contains '0' and the 'Used Hours' field contains '0:00'. The 'Documents Path' field contains '\\Gohar\d\MAS\MAS2017\SMP\MAS90\Dc'.

Upon pressing **PM Schedule** button the following dialogue is opened allowing the user to select the desired schedule for PM Task generation.



The image shows a 'PM Schedule' dialog box with a blue title bar and a green 'S' icon. The 'Schedule' dropdown is set to 'Daily'. The 'Every' field contains the number '1', followed by the text 'day(s)'. The 'Start Date' field is populated with '1/25/2017' and the 'End Date' field is populated with '1/26/2018'. At the bottom right, there are 'OK' and 'Cancel' buttons.

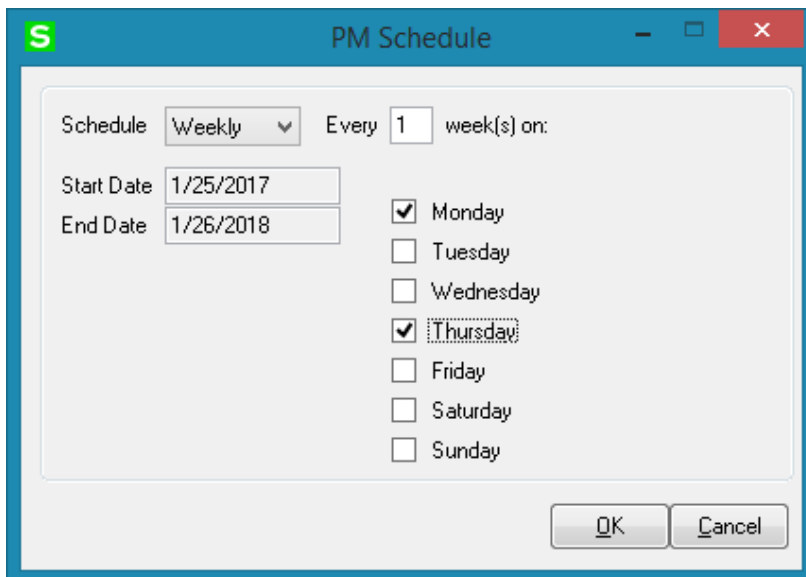
From the **Schedule** drop-down select the occurrence of the PM task

Start Date – is populated with the Contract Start Date

End Date- is populated with the Contract End Date

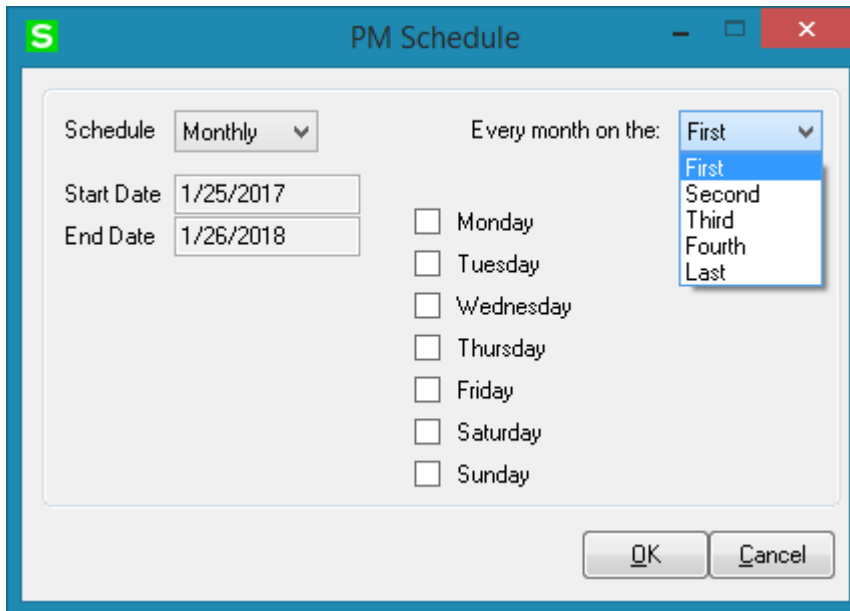
Every - Type the time interval for PM Task generation. For example, to schedule the job to process every two days, select Daily at the Schedule Job field, and type 2 at this field. This field is available only if Daily or Weekly is selected in the Schedule drop-down list.

Days of the Week - Select the day of the week for PM Task to be generated. These check boxes are available only if Weekly or Monthly is selected at the Schedule field.



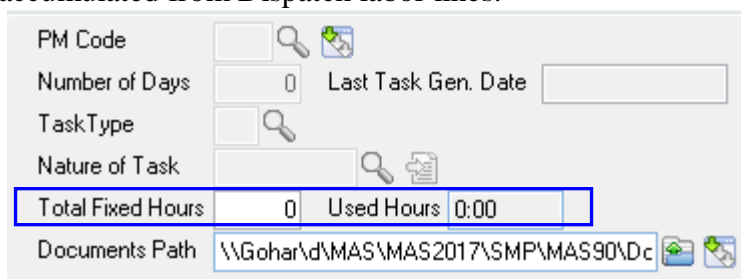
The image shows the 'PM Schedule' dialog box with the 'Schedule' dropdown set to 'Weekly'. The 'Every' field contains '1' followed by 'week(s) on:'. The 'Start Date' is '1/25/2017' and the 'End Date' is '1/26/2018'. To the right, there is a list of days with checkboxes: Monday (checked), Tuesday, Wednesday, Thursday (checked), Friday, Saturday, and Sunday. 'OK' and 'Cancel' buttons are at the bottom right.

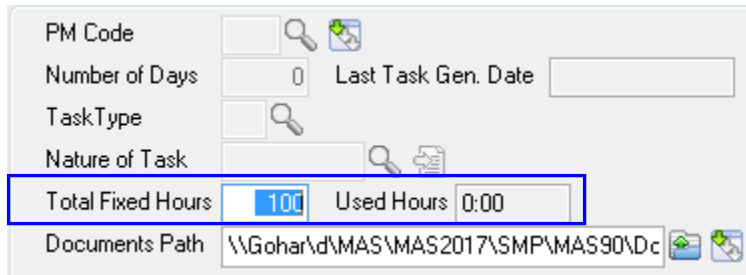
From the **Every Month on the** drop-down box select the week of the month for generating PM Task. For example, to schedule the Task to be generated every first Wednesday of the month, select **Monthly** at the Schedule field, select First at this field, and select the Wednesday check box. This field is available only if Monthly is selected at the **Schedule** field.



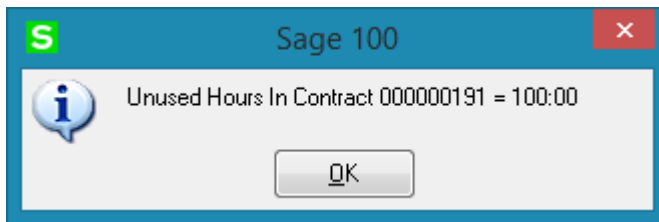
For an example, please refer to the [Auto Generate Task Based on PM Schedule](#).

If Fixed Hours is selected for Contract type, the Total Fixed Hours field becomes available for entry of Total Fixed Hours covered by current contract. As labor hours are charged against the contract, the Used Hours field is respectively updated with the amount of hours accumulated from Dispatch labor lines.

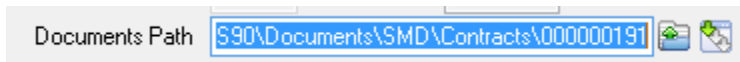




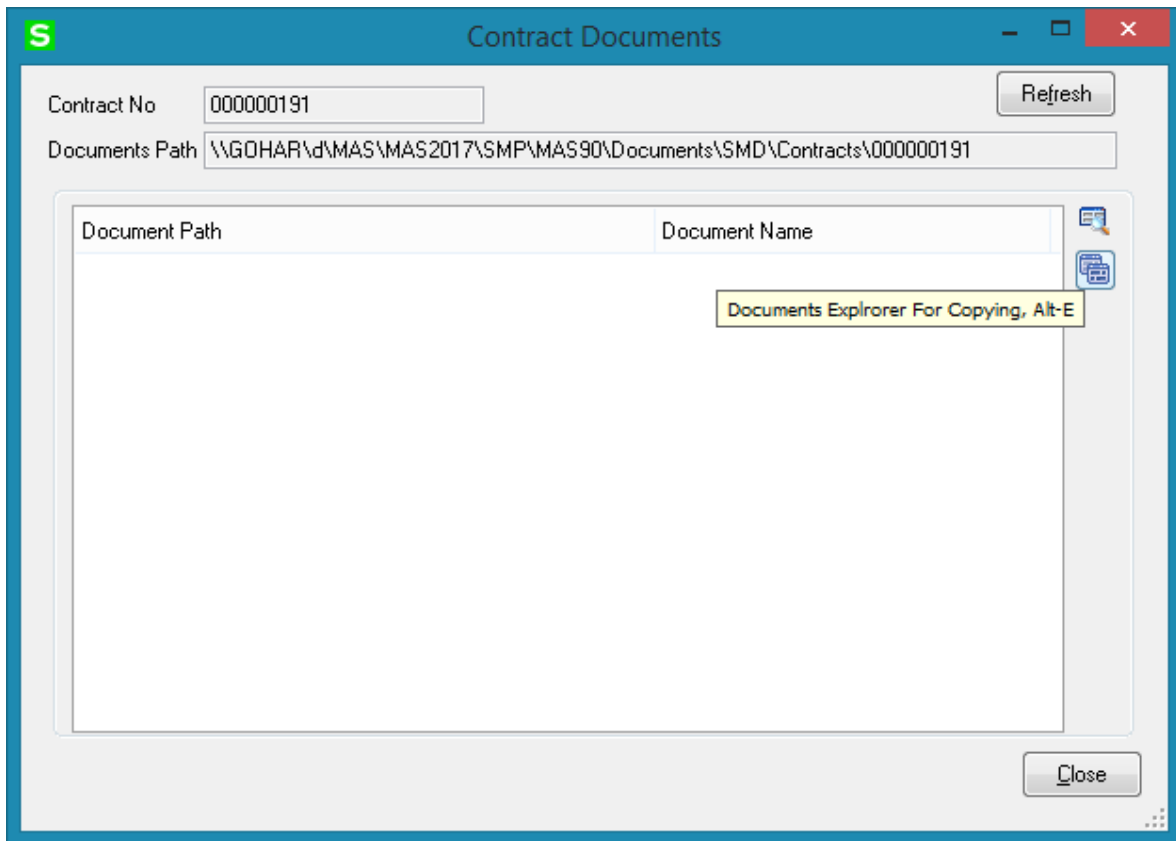
In the Task Data entry the user is prompted about the hours remaining unused for current Contract upon creating a new Task or selecting a Task created for current Contract.



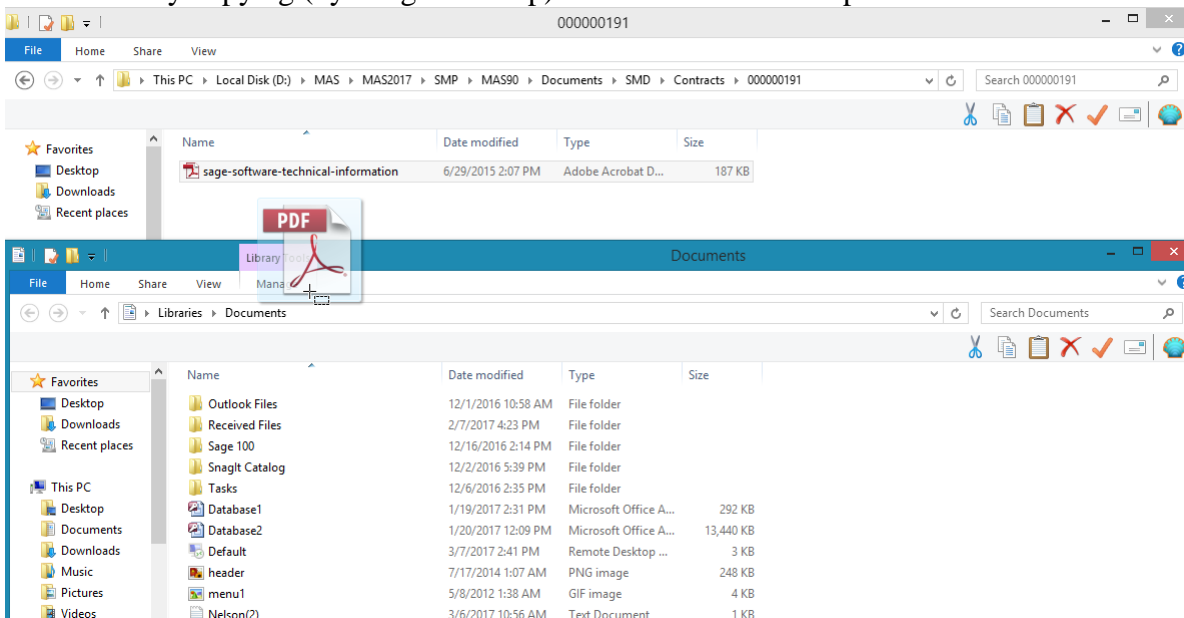
When new Contract is created the **Documents Path** is defaulted to the **Documents Path** set in the **Service Management Options** with the Contract # subfolder automatically created:



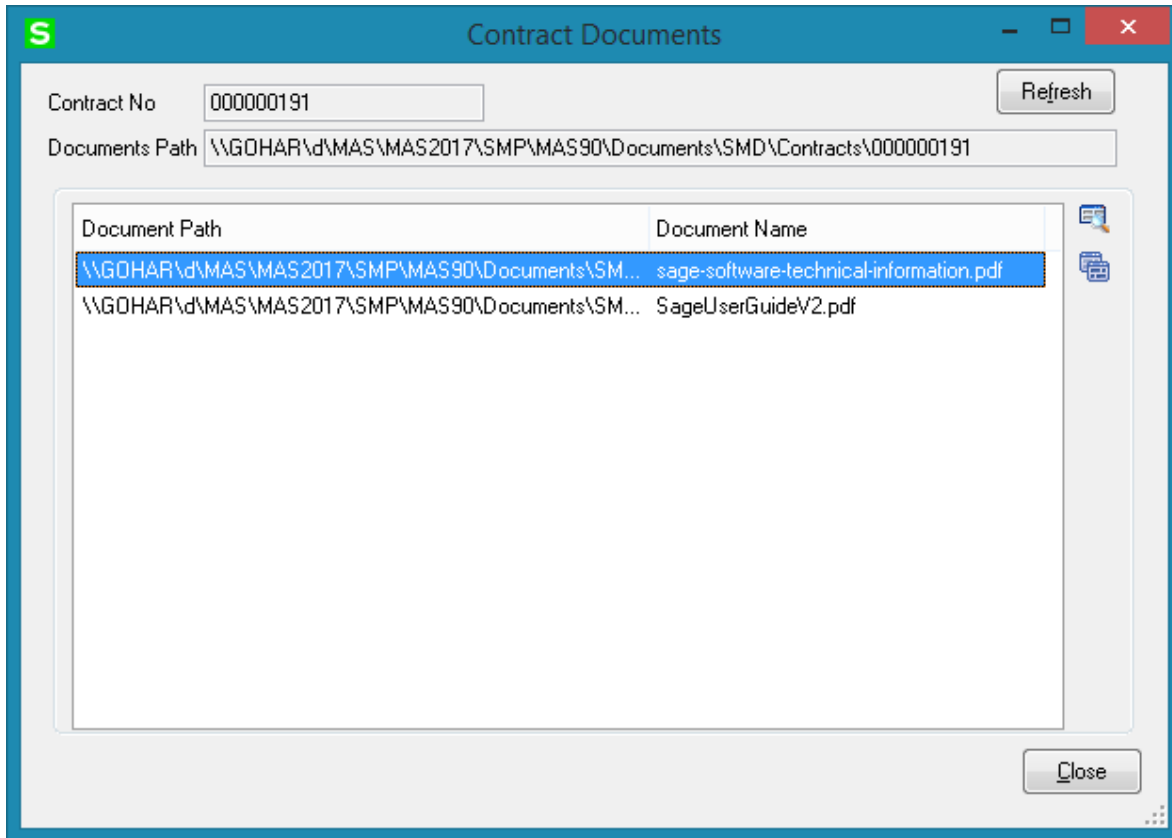
Press the **Contract Documents** button to open the Contract Documents screen:



The **Documents Explorer For Copying** button added on the Contract Documents screen allows for launching the documents' paths in 2 different Windows explorer views. It enables easily copying (by Drag-and-drop) a document from one path to another:

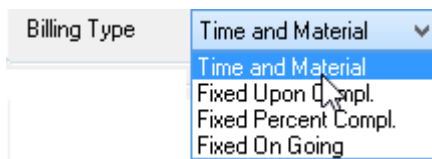


Once a document is added in the Contract# folder, press **Refresh** button to have it added in the documents list.



Press the  Open Document button to open the selected document.

Contract Billing Type- this field indicates how the contract should be billed.



- **Time and Material** - the Invoice amount will be calculated based on the time spent and material used.
- **Fixed Upon Completion** - the payment will be done in the fixed amount and on completing the work.
- **Fixed Percent Completion** - the payment will be done by percent of completing the work.
- **Fixed On Going** - the payment will be done during the work not more than the fixed amount.

The fields, options added in the **Generation** Section are intended for generating sales documents: an order or invoice directly from the contract screen.

Document- Select the output document type. The following options are available:

- **Standard Order**
- **Price Quote**
- **Standard Invoice**
- **None**

Contract Amount From: The amount can be calculated based on the total amount indicated in the **Header** tab of the contract or from the Total Amount of Items added in the Contract Items screen.

Bill Freq Code- Enter the **Bill Freq Code** to denote a scheme of Billing Frequency. This field supports up to 5 alphanumeric characters. When selecting customer, this field is defaulted from the Customer and may be changed if required.

Select the **Technician Code** to have the Contract's Technician loaded as Preferred Technician of the Task created for current Contract in the Task Data Entry or generated by the Auto Generate Tasks Selection program.

Click the **Generation** button to generate the chosen document. If **Generation Document** is set to None, no document will be generated.

If you do not want to generate documents at the moment, you can do it from the **Service Management Main** menu using **Auto Generate Contract Sales Documents** program.

For any Contract type the user is warned that the "Contract is Expired" when trying to charge anything against the contract past the Contract End Date.

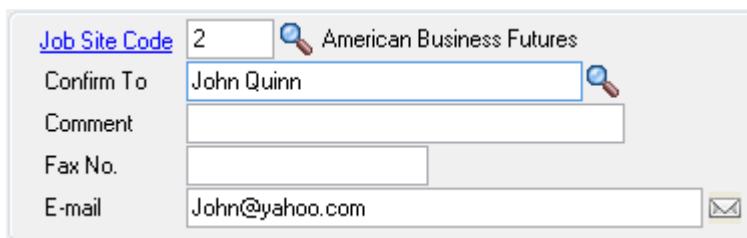
If **All Materials Are Covered** / **All Labors Are Covered** checkboxes are marked, all the materials and labor charges issued against this contract will have zero prices. If there are items and labor charges entered in the Lines tab, they will be exempted from this rule. If these checkboxes are left blank, then users have to specify all the items and all the labor charges covered by this contract in the appropriate line entry tabs.

These fields are disabled and you cannot change settings of these checkboxes if there are Items already entered in the Lines tab.




Note that only authorized users (having the **Allow To Change Coverage Flag and Amount** security event enabled in the **Role Maintenance**) can set/change these flags and enter/change the Contract Total Amount.

Job Sit Code- Enter a location code to automatically load the Shipping Address defined in the Customer Ship To Address Maintenance. Press the lookup button to list all location codes. The **Job Site Code** defaults to the Ship To location specified as the Primary Ship To in the Customer Maintenance.

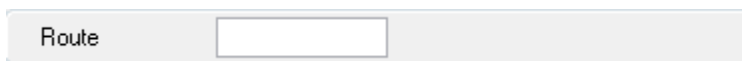
The field hyperlink allows launching the **Customer Ship To Address Maintenance**. A new **Job Site Code** can be added on the fly.



The screenshot shows a form with the following fields and values:

Job Site Code	2	 American Business Futures
Confirm To	John Quinn 	
Comment		
Fax No.		
E-mail	John@yahoo.com 	

Confirm To- enter the appropriate Customer Contact in the **Confirm To** Field.



The screenshot shows a form with the following field and value:

Route	
-------	--

Route - this field (5 digits) allows for entry of route information for each Contract. When Task is created for a Contract, the Route information is loaded to respective field added on the Header tab of the **Task Data Entry**.

Contract Items- click this field hyperlink to launch the Contract Item Maintenance and enter the **Items** covered by the contract.

S Contract Item Maintenance (SMD) 2/1/2017

Customer No. 01-ABF American Business Futures
 Contract Number 000000191

Component... Labor/Skill... Quick Row 1

	Item Code	Lot/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date
1	1001-HON-H252		<input type="checkbox"/>	1.00	75.00	1/25/2017	1/26/2018
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	.00	1/25/2017	1/26/2018
3	6655		<input type="checkbox"/>	3.00	170.00	1/25/2017	1/26/2018
4			<input type="checkbox"/>	.00	.00		

Coverage Code
 Response Code
 Ship To 2
 Billing Freq.
 PM Code DY
 Type Code

Accept Cancel Delete

If you want to mark an item as default for the contract, check the **DI** box.

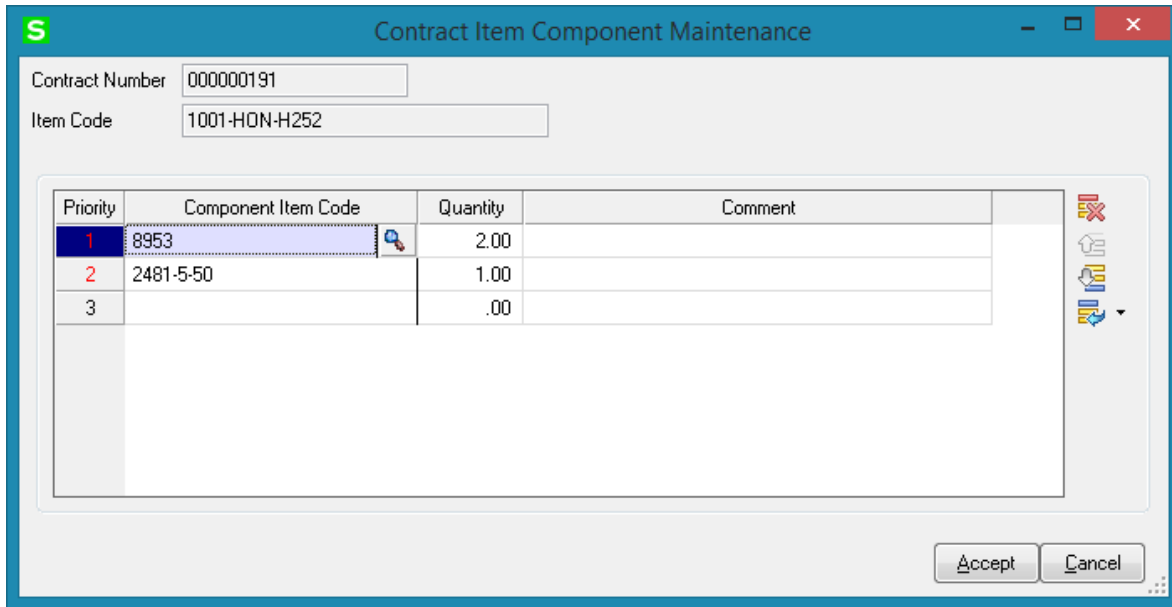
If the Item is a **Lot /Serial Item**, enter the Lot/Serial Number in the respective field.

You may have multiple lines of the same item with different settings.

Fill in the Coverage Code, Response Code, Ship To, PM Code and the rest of fields available in the secondary grid, if required.

The **Ship To, Task Type, Nature of Task, Coverage, and Response** fields are automatically loaded in the tasks generated by the **Auto Generate Tasks Selection** program for all of the preventive maintenance contract items.

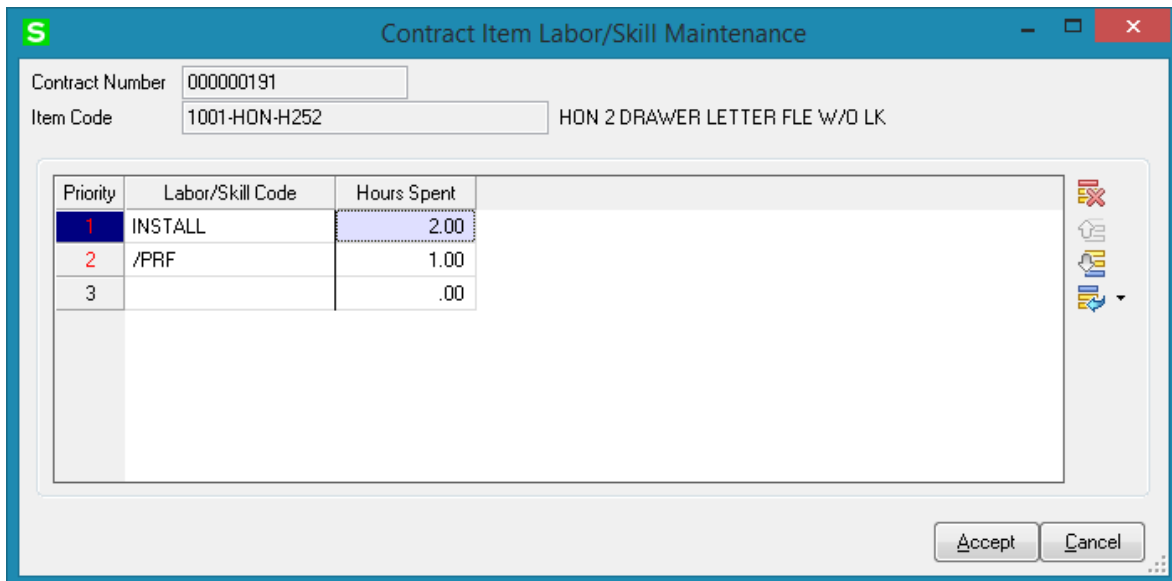
The **Component** button allows for entry of Inventory Item component lines for the selected Contract Item line if there is a PM code specified for it. The **Labor/Skill** button allows for entry of Labor/Skill lines for the selected contract item line. The **Contract Number** and **Item Code** fields are populated with respective values from **Contract Item Maintenance**.



The screenshot shows the 'Contract Item Component Maintenance' window. It has a title bar with a green 'S' icon and standard window controls. Below the title bar, there are two input fields: 'Contract Number' with the value '000000191' and 'Item Code' with the value '1001-HON-H252'. The main area contains a table with four columns: 'Priority', 'Component Item Code', 'Quantity', and 'Comment'. The table has three rows. The first row has Priority '1' (highlighted in blue), Component Item Code '8953', and Quantity '2.00'. The second row has Priority '2' (highlighted in red), Component Item Code '2481-5-50', and Quantity '1.00'. The third row has Priority '3' (highlighted in grey), Component Item Code, and Quantity '.00'. To the right of the table is a vertical toolbar with icons for adding, deleting, and saving. At the bottom right are 'Accept' and 'Cancel' buttons.

Priority	Component Item Code	Quantity	Comment
1	8953	2.00	
2	2481-5-50	1.00	
3		.00	

The components entered here will be loaded into the Dispatch transaction generated during Task generation by the **Auto Generate Task Selection** program with **Generate Dispatches for all Contract Items** option turned on.



The screenshot shows the 'Contract Item Labor/Skill Maintenance' window. It has a title bar with a green 'S' icon and standard window controls. Below the title bar, there are two input fields: 'Contract Number' with the value '000000191' and 'Item Code' with the value '1001-HON-H252'. To the right of the 'Item Code' field is a text label 'HON 2 DRAWER LETTER FLE W/O LK'. The main area contains a table with three columns: 'Priority', 'Labor/Skill Code', and 'Hours Spent'. The table has three rows. The first row has Priority '1' (highlighted in blue), Labor/Skill Code 'INSTALL', and Hours Spent '2.00'. The second row has Priority '2' (highlighted in red), Labor/Skill Code '/PRF', and Hours Spent '1.00'. The third row has Priority '3' (highlighted in grey), Labor/Skill Code, and Hours Spent '.00'. To the right of the table is a vertical toolbar with icons for adding, deleting, and saving. At the bottom right are 'Accept' and 'Cancel' buttons.

Priority	Labor/Skill Code	Hours Spent
1	INSTALL	2.00
2	/PRF	1.00
3		.00

Contract Renewal

The **Renew Bill Item**, **Renew Duration**, **Renew Amount** fields added on the Contract Items secondary grid are used for Contract renewal.

Customer No. 01-ABF American Business Futures
Contract Number 000000191

	Item Code	Item/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input checked="" type="checkbox"/>	2.00	75.00	1/25/2017	1/26/2018	01-CONT
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	120.00	1/25/2017	1/26/2018	
3	6655		<input type="checkbox"/>	3.00	170.00	1/25/2017	1/26/2018	
4			<input type="checkbox"/>	.00	.00			

Renew Duration	2M
Renew Amount	90.00
Vendor Amount	65.00
Last Amount	.00
Amount Ch. Date	
Number Of Inv.	0

Accept Cancel Delete

Renew Bill Item- a Regular or Misc Item may be selected. This Item is used during renewal order generation. The line Item is set by default and may be replaced by any other Item.

Renew Duration –this field indicates the duration of Contract renewal, for how many days, months, year the Contract should be renewed. The duration should be specified as follows: 1Y, 3Y, 9M, 365D ...

Renew Amount- is the amount of a contract for a renewed agreement.

Vendor Amount- the Amount entered in this field is loaded as the Vendor Cost for the line in the generated Sales Order and is used when generating Purchase Order from SO.

Vendor No- select the **Vendor Number** to be used when generating PO from Sales Order.

For contract renewals the order can be generated from contract header or from **Auto Contract Sales Document** menu. It is necessary to generate the Sales document with **Contract Amount** option set to Items.

Select Field	Operand	Value
Customer Number	All	
Contract No	All	

	Contract No.	Customer No.	Freq Code	Amount From	Document	Total Amount	Include
1	000000191	01-ABF		Items	Standard Order	365.00	<input checked="" type="checkbox"/>

The **Control Date for Renewal** is intended for specifying the date for Contract renewal. This date should be greater than the Contract Item Ending Date in order to have renewal applied to the Contract Item.

After making the necessary selections and pressing **Proceed** button the Contracts due to renewal are loaded in the grid. Select the **Include** checkbox and press the **Generation** button

Next Sales Order Number: 0000370

Next Invoice Number:

OK

Here is the Sales Order generated:

S Sales Order Entry (SMD) 2/3/2017

Order Number: 0000370

Copy From... Defaults... Customer... Credit... Task...

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment | User: useriig

Quick Row: 1

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1	1001-HON-H252	1.00	.00	90.000	90.00	
2	*2480-8-50	2.00	.00	60.000	120.00	Lot No. "FEB-203"
3	*6655	3.00	.00	56.667	170.00	
4		.00	.00	.000	.00	

Cost: 65.000

Sales Account: 400-01-0200

Cost Account: 450-01-0200

Warranty Code: 30 DAY

Expiration Date:

Total Amount: 380.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

The Items having Renew Amount entered in the Contract Items screen are loaded with the Unit Price equal to Renew Amount.

The Cost field is populated with Vendor Amount field value.

After Invoicing the Sales Order and updating Sales Journal the Contract Items due to renewal are renewed with new Ending Date:

S Contract Item Maintenance (SMD) 2/3/2017

Customer No. 01-ABF American Business Futures
 Contract Number 000000191

Component... Labor/Skill... Quick Row 1

	Item Code	pt/Serial Num	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input checked="" type="checkbox"/>	2.00	75.00	1/25/2017	3/26/2018	01-CONT
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	120.00	1/25/2017	1/26/2018	
3	6655		<input type="checkbox"/>	3.00	170.00	1/25/2017	1/26/2018	
4			<input type="checkbox"/>	.00	.00			

Description HON 2 DRAWER LETTER FLE W/O LK
 Coverage Code
 Response Code
 Ship To 2
 Billing Freq.
 PM Code DY

Accept Cancel Delete

The renewed Ending Date for Contract Item is calculated as the old **Ending Date** + **Renewal Duration Days**.

The **Last Amount** and **Amount Ch. Date** fields are populated when the Amount is changed for a line. Upon changing the Amount field on the line Item the Last Amount field is populated with initial Amount value and the **Amount Change Date** field is populated with the **Date** when change is made.

S Contract Item Maintenance (SMD) 2/3/2017

Customer No. 01-ABF American Business Futures
 Contract Number 000000191

Component... Labor/Skill... Quick Row 1

	Item Code	pt/Serial Num	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input checked="" type="checkbox"/>	2.00	100.00	1/25/2017	3/26/2018	01-CONT
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	120.00	1/25/2017	1/26/2018	
3	6655		<input type="checkbox"/>	3.00	170.00	1/25/2017	1/26/2018	
4			<input type="checkbox"/>	.00	.00			

Renew Duration 2M
 Renew Amount 90.00
 Vendor Amount 65.00
 Last Amount 75.00
 Amount Ch. Date 2/3/2017
 Number Of Inv. 0

Accept Cancel Delete

The **Number of Inv.** field is populated when Invoice is generated for current Contract Item.

PM Schedule

The **Number of Visit** field added on the **Contract Item Maintenance -> PM Schedule** screen allows for entering visit number for each day of week.

Contract Item Maintenance (SMD) 2/3/2017

Customer No. 01-ABF American Business Futures
Contract Number 000000191

Component... Labor/Skill... Quick Row 3

PM Schedule

	Item Code	Item/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input checked="" type="checkbox"/>	2.00	100.00	1/25/2017	3/26/2018	01-CONT
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	120.00	1/25/2017	1/26/2018	
3	6655		<input type="checkbox"/>	3.00	170.00	1/25/2017	1/26/2018	
4			<input type="checkbox"/>	.00	.00			

Coverage Code
Response Code
Ship To
Billing Freq.
PM Code 00
Type Code

Accept Cancel Delete

The screenshot shows the 'Contract Item Maintenance (SMD) 2/3/2017' window. At the top, the Customer No. is '01-ABF' and the Contract Number is '000000191'. Below this is a table with columns: Item Code, Item/Serial Number, DI, Quantity, Amount, Starting Date, Ending Date, and Vendor No. The table contains four rows, with the third row (Item Code 6655) selected. A 'PM Schedule' dialog box is open in the foreground, showing a 'Weekly' schedule every 1 week(s) on. The start date is 1/25/2017 and the end date is 1/26/2018. The dialog lists days of the week with checkboxes and a 'Number Of Visit' field. Monday and Thursday are selected, both with a value of 3 in the 'Number Of Visit' field.

	Item Code	Item/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input checked="" type="checkbox"/>	2.00	100.00	1/25/2017	3/26/2018	01-CONT
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	120.00	1/25/2017	1/26/2018	
3	6655		<input type="checkbox"/>	3.00	170.00	1/25/2017	1/26/2018	
4								

Schedule		Every 1 week(s) on:		Number Of Visit	
Start Date	1/25/2017	<input checked="" type="checkbox"/> Monday	3	<input type="text"/>	<input type="text"/>
End Date	1/26/2018	<input type="checkbox"/> Tuesday	0	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/> Wednesday	0	<input type="text"/>	<input type="text"/>
		<input checked="" type="checkbox"/> Thursday	3	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/> Friday	0	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/> Saturday	0	<input type="text"/>	<input type="text"/>
		<input type="checkbox"/> Sunday	0	<input type="text"/>	<input type="text"/>

The **Contract Item Number of Visit List** is opened when focus is put in the **Number of Visit** field or by pressing the button next to the field.

The **Contract Item Number of Visit List** is loaded with all Contracts for current Item having the same **Route** specified on the Contract header and the same **Week of Day** (e.g. Monday) selected as the scheduled visit day.

	Customer No.	Contract No.	Number Of Visit	Ship-To	Address
1	01-ABF	000000182	1	2	Racine Warehouse 5411 Kendrick Place
2	01-ABF	000000190	2	2	Racine Warehouse 5411 Kendrick Place
3	01-ABF	000000191	3	2	Racine Warehouse 5411 Kendrick Place

The **Number of Visit** field is highlighted red for current Contract. The user may change the Number of Visit (the order of visits) for any of the listed Contract and it will be updated on that Contract after pressing OK.

When Task is generated for Contract Item by the **Auto Generate Tasks Selection** program the **Number of Visit** field value is loaded into the **Stop No** field of respective Task.

Address Tab

The second tab on the **Contract Entry** screen (**Address**) appears as follows.

Contract No. 000000191 NTC NBT Install

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned | 8. Unearned

Customer No. 01:ABF American Business Futures Copy Ship To

Bill To Address

Name American Business Futures

Address 2131 N. 14th Street
Suite 100
Accounting Department

ZIP Code 53205-1204

City Milwaukee State WI

Country USA United States

Ship To Address

Job Sit... 2

Name American Business Futures

Address Racine Warehouse
5411 Kendrick Place

ZIP Code 53120

City Racine State WI

Country USA United States

Quick Print Generation Copy From... Accept Cancel Delete

Select the **Address** tab to view or enter the job site location information. The **Bill To Address** information is defaulted from the Customer Maintenance and may be changed here.

The **Bill To** field becomes visible if the **Enable Bill To Customer Reporting** option is turned on in the **Accounts Receivable Options**.

S Contract Data Entry

Contract No. 000000191 NTC NBT

1. Header | 2. Address | 3. Lines | 4. Tasks

Customer No. 01-ABF American B

Bill To Address

Bill To 01-AVNET

Name Avnet Processing Corp

Address 3361 W. Kenosha
Powers Building
Suite 100

ZIP Code 53120

City Racine State WI

Country USA United States

The **Bill To** field is loaded with **Bill To Customer** number setup for the Task's Customer in the **Bill To/Sold To Maintenance**. Changing the **Bill To Customer** is controlled by security role. Only the users assigned to a role with "**Allow Bill To Customer Number Override During S/O Entry**" security event enabled for Sales Order module in the Role Maintenance can change it. The **Bill To** field is disabled if the "**Allow Bill To Customer Number Override During S/O Entry**" security event is not enabled in the Role Maintenance

Upon changing the **Bill To Customer** on a Contract a prompt appears about updating the Bill To Customer on all tasks associated with the Contract.

S Sage 100

Do you want to update the Bill to Customer on all tasks under the contract?

Yes No

Select **Yes** to change the **Bill To Customer** on all Tasks associated with current Contract. Select **No** if you don't want to change the **Bill To Customer** on the Tasks.

The **Ship To Address** information is loaded from the Customer Ship To Address Maintenance if there is Primary Ship To set for current Customer, otherwise the Bill To Address information is displayed.

You can enter new **Job Site** code and make necessary changes in address information and then save the data as a customer's new **Ship-To** code. You can do this by clicking "**Yes**" on the following prompt:



The **Customer Ship to Address Maintenance** screen will be displayed with the current information. Review and click **OK** to save the new Ship To Address.

The **Copy Ship To** button allows for copying the **Ship To Address** information to the **Bill To Address** fields.

Lines Tab

Use this tab to enter all the materials, Labor and Skill covered by the contract. If the **All Materials Covered** checkbox is selected, this tab will contain information about the items/Labor/Skill not covered by the contract.

Use this tab to enter information on all the materials covered by the contract. If the **All Materials Covered** checkbox is selected, this tab will contain information about the items not covered by the contract.

Select the line type from the Line Type drop-down box to enable respective lookup in the lines to select the Item No/Labor Code/Skill Code.

The **L S** Load Labors, Load Skills buttons allows for loading all Labor/Skill codes at once.

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactic | 7. Unearned

Line Type Item Code Quick Row 1 L S

Item/L	Type	Description	Lot/Serial Number	U/M	Expiration Date	Pricing M
1						

Quick Print Generation Copy From... Accept Cancel Delete

In either case, users have option of specifying custom pricing information for a given item using the **Pricing Method** dropdown window as shown below.

- **System Price** – Standard MAS price will be applied whenever items are sold against this contract.
- **Discount %** - User will specify a discount percent, which will be applied to an item's standard price whenever items are sold against this contract.
- **Override Price** – Overridden price will be applied to an item whenever the item is sold against this contract.
- **Price Off** – Amount specified here will be taken off the item's standard price.
-

Contract Data Entry (SMD) 2/3/2017

Contract No. 000000191

NTC NBT

Install

Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Line Type Labor Code Quick Row 1

	m/Labor/Skill Co	Type	Description	Serial Num	U/M	Expiration Date	Pricing Method	Disc Percent
1	INSTALL	Labor	Installation Services			3/26/2018	System Price	0.000
2							System Price	0.000

System Price
Discount %
Override Price
Price Off

Quick Print Generation Copy From... Accept Cancel Delete

Tasks Tab

The **Tasks** tab of the **Contract Entry** screen allows the user to view all the tasks and dispatches for current contract.

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Active ☒ History ☒ Dispatches ☐ Closed Dispatches ☐

Task No	Task Status	Nature of Task	Pref Tech.	Active/Hist	Scheduled Date
0000964	Entered	PROGRAM	ADAM	Active	2/1/2017
0000965	Entered	PROGRAM	ADAM	Active	2/3/2017
0000966	Closed	PROGRAM	ADAM	History	2/3/2017

Quick Print Generation Copy From... Accept Cancel Delete

Check the **Active** box to list the active tasks.

Check the **History** box to list the closed tasks saved in the History.

The **Scheduled Date** field displays the Task's Scheduled Date if no Dispatch is created for the Task. If the Task has dispatches the Scheduled Date shows the Starting Date of the last Dispatch.

The **Task Inquiry** button displays the **Task Data Entry** screen for the selected **Active** task or the **Task History Inquiry** if the task is from **History**.

The **Dispatches** and **Closed Dispatches** options allow for displaying respectively open and closed dispatches with current Contract Number assigned to the Dispatch Header.

Contract No. 000000191 NTC NBT Install

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Active ☐ History ☐ Dispatches ☒ Closed Dispatches ☐

Task No	Dispatch No	Dispatch Status	Technician	Equipment
0000964	0001	Open	ADAM	1001-HON-H254LK
0000964	0002	Open	ADAM	

Quick Print Generation Copy From... Accept Cancel Delete

When the Status of the Contract having active Task/Dispatches is changed to Closed, a prompt appears about open Tasks/Dispatches allowing the user to confirm Contract closing.

Sage 100

? Open Task/Dispatches in the system. Are you sure you want to close the contract?

Yes No

Upon selecting Yes, open Tasks and the Dispatches not containing inventory lines will be automatically closed along with the Contract.

JC History Tab

The **JC History** tab displays the Job Code transaction history for current contract. Whenever a Sales Order or a Sales Order Invoice is processed in MAS 90, and that order or invoice has a contract number specified on it, all the line information will be posted to the Contract File, organized by Job Codes.

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Job Code 554-000-000 Shipping

Period	Ending	Quantity Postings	Cost Billed	Dollars Billed
01	Jan 31	.00	.00	.00
02	Feb 28	12.00	866.60	1,288.20
03	Mar 31	.00	.00	.00
04	Apr 30	.00	.00	.00
05	May 31	.00	.00	.00
06	June 30	.00	.00	.00
07	July 31	.00	.00	.00
08	Aug 31	.00	.00	.00
09	Sept 30	.00	.00	.00
10	Oct 31	.00	.00	.00
11	Nov 30	.00	.00	.00
12	Dec 31	.00	.00	.00
Total		12.00	866.60	1,288.20

2017

J.C. Totals
Year Totals

Quick Print Generation Copy From... Accept Cancel Delete

In the Job Code field enter the Job Code you wish to view.

Use the **Year** field to see all the postings for the specified Job Code in the specified year.

Use the **J.C. Totals** button to see total information for all Job Codes specific to the current contract.

S Contract Data Entry (SMD) 2/3/2017

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Job Code 000-000-000 All Job Codes

Period	Ending	Quantity Postings	Cost Billed	Dollars Billed
01	Jan 31	.00	.00	.00
02	Feb 28	18.00	896.18	1,668.20
03	Mar 31	.00	.00	.00
04	Apr 30	.00	.00	.00
05	May 31	.00	.00	.00
06	June 30	.00	.00	.00
07	July 31	.00	.00	.00
08	Aug 31	.00	.00	.00
09	Sept 30	.00	.00	.00
10	Oct 31	.00	.00	.00
11	Nov 30	.00	.00	.00
12	Dec 31	.00	.00	.00
Total		18.00	896.18	1,668.20

2017 ▼

J.C. Totals

Year Totals

Quick Print Generation Copy From... Accept Cancel Delete

Use the **Year Totals** button to view the postings to a specific job code for all years.

Transactions Tab

This tab allows the user to see the Contract related Transactions. The following options are available:

- Sales Order
- Purchase Order
- Invoice History
- Invoice History detail
- RMA

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

☐ Sales Order ☐ Purchase Order ☒ Invoice History ☐ Invoice History Detail ☐ RMA

Invoice No.	Invoice Type	Inv Date	Amount
0100264	Invoice	2/3/2017	380.00
0100265	Invoice	2/3/2017	1,288.20

Zoom, Alt-Z

Total Invoiced 1,668.20

Quick Print Generation Copy From... Accept Cancel Delete

The Zoom button on the right hand of the list box enables drill down to the selected entry.

S A/R Invoice History Inquiry (SMD) 2/3/2017

Invoice No. 0100264 Type INV Date 2/3/2017 Source S/O Order No. 0000370

1. Main 2. Lines

Customer No. 01-ABF American Business Futures

Ship To 2 American Business Futures

Source Journal SO-000056 RMA No.

Contract No. 000000191

Terms Code 01 Net 30 Days Ship Date 2/3/2017

Ship Via UPS BLUE Schedule W/

FDB Ship Zone Tracking...

Customer PO Weight

Salesperson 01-0100 Jim Kentley Apply To

Confirm To John Quinn IT User ID

Comment

E-mail artie@abf.com

Fax Batch Fax ☐ Signature

Taxable	.00
Nontaxable	380.00
Freight	.00
Sales Tax	.00
Discount	.00
Invoice Total	380.00
Deposit	.00
Net Invoice	380.00
Balance	380.00

OK

The **Invoice History Detail** option allows for viewing all Invoice lines, which are associated with current contract. The **Contract Line Total** displays the total amount of the Invoice lines, which have the current Contract number assigned:

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

☐ Sales Order ☐ Purchase Order ☐ Invoice History ☒ Invoice History Detail ☐ RMA

Invoice No.	Inv Date	Inv Type	Line Amount
0100269	2/6/2017	IN	405.00
0100269	2/6/2017	IN	69.90

Contract Line Total 474.90

Quick Print Generation Copy From... Accept Cancel Delete

Press Zoom button on the right hand to drill down to the **A/R Invoice History Inquiry**.

S A/R Invoice History Inquiry (SMD) 2/6/2017

Invoice No. 0100269 Type INV Date 2/6/2017 Current... Tax Detail...

Source S/O Order No. Split Comm... Shipping ...

1. Main 2. Lines

Line No.	Item Code	Item Description	Shipped	Unit Price	Extension
1	1001-HON-H...	HON 4 DRAWER LETTER ...	3.00	135.000	405.00
2	2480-8-50	DESK FILE 8" CAP 50	2.00	34.950	69.90

OK Print ?

Unearned Tab

Unearned revenue is money received by an individual or company for a service or product that has yet to be fulfilled. Unearned revenue can be thought of as a "prepayment" for goods or services that a person or company is expected to produce for the purchaser. As a result of this prepayment, the seller has a liability equal to the revenue earned until delivery of the good or service.

For example if a company accepts \$1,200 for a one-year subscription, the amount is recorded as an increase in cash and an increase in unearned revenue. Both are balance sheet accounts, so the transaction does not immediately affect the income statement. If it is a monthly publication, as each periodical is delivered, the liability or unearned revenue is reduced by \$100 while revenue is increased by the same amount.

The **Unearned** tab on the **Contract Entry** allows for creation of the revenue recognition schedule for the contract.

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date Trans. Amt. .00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
-----	------	---------	----------------	------------	---------------	------------

No Revenue Schedule ☐ Planned 0.00 Unearned 0.00 Sales 0.00

Quick Print Generation Copy From... Accept Cancel Delete

Upon checking the **Unearned Revenue** box the **Revenue Schedule** window is opened allowing the user to schedule revenue posting:

Revenue Schedule

Total Amount 2,000.00

Starting Date 1/25/2017

Ending Date 1/26/2018

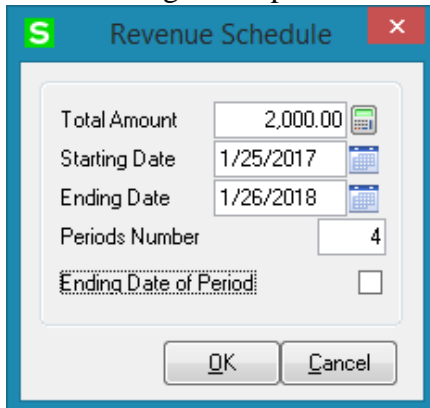
Periods Number

Ending Date of Period ☒

OK Cancel

The Total Amount is the amount to be paid during the Contract accomplishment. In our example it is 2000\$ for 1 year.

Period Number divides the time interval between the **Starting** and **Ending Dates** into the entered number of periods. The Total Amount is proportionally distributed by the number of periods specified. In our example it is 4. So the Transaction Amount for each period will be $2000/4=500$. Check the **Ending Date of Period** box if you want the amounts be paid on the closest Ending Dates of Periods instead of the dates suggested by the schedule. Ending Dates of Period are setup in the **Fiscal Year Maintenance** program under the General Ledger Setup menu.

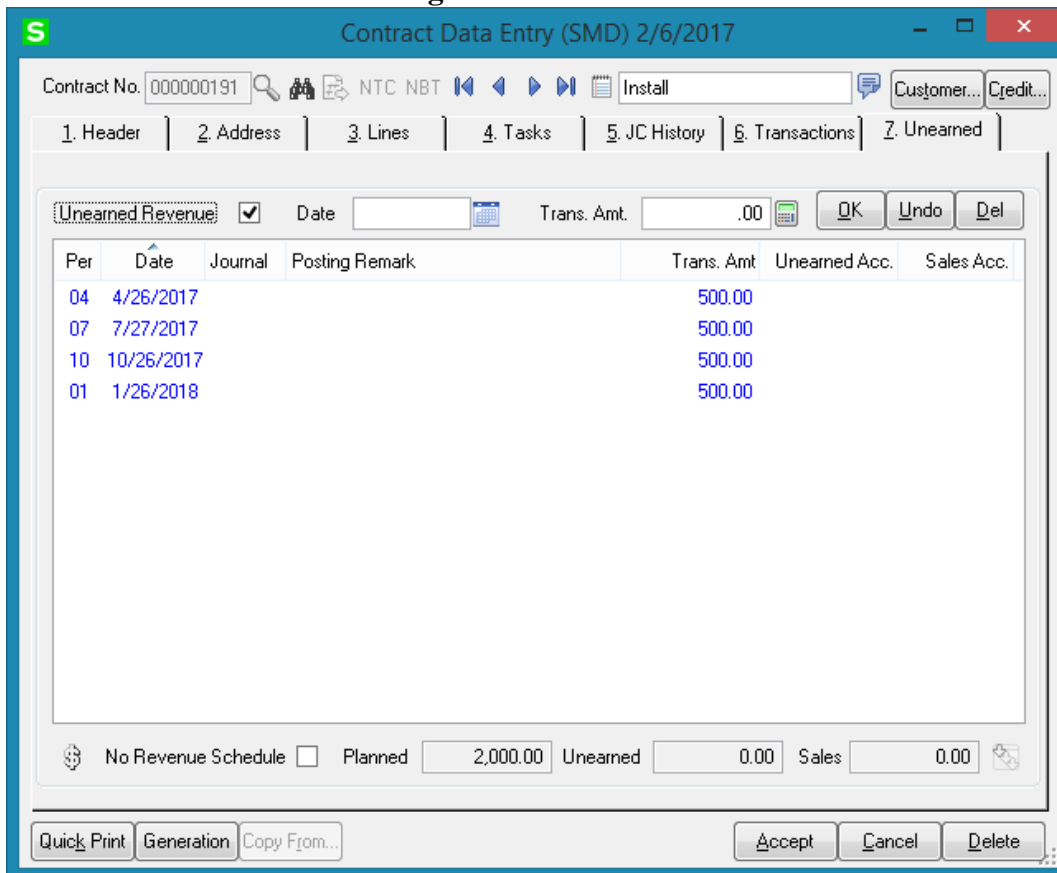


The **Revenue Schedule** dialog box contains the following fields:

- Total Amount: 2,000.00
- Starting Date: 1/25/2017
- Ending Date: 1/26/2018
- Periods Number: 4
- Ending Date of Period: ☐

Buttons: OK, Cancel

Below is shown the distributions with and without **Ending Date of Period** box checked. The schedule without the **Ending Date of Period** box checked looks like this:



The **Contract Data Entry (SMD) 2/6/2017** window shows the following details:

Contract No. 000000191 | NTC NBT | Install | Customer... | Credit...

Tabs: 1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date: [] Trans. Amt. .00 | OK | Undo | Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
04	4/26/2017			500.00		
07	7/27/2017			500.00		
10	10/26/2017			500.00		
01	1/26/2018			500.00		

Summary: No Revenue Schedule ☐ Planned 2,000.00 Unearned 0.00 Sales 0.00

Buttons: Quick Print, Generation, Copy From... | Accept, Cancel, Delete

And the schedule with the **Ending Date of Period** checkbox selected looks like this:

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue: ☒ Date: Trans. Amt: .00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
04	4/30/2017			500.00		
07	7/31/2017			500.00		
10	10/31/2017			500.00		
01	1/31/2018			500.00		

No Revenue Schedule ☐ Planned 2,000.00 Unearned 0.00 Sales 0.00





Quick Print Generation Copy From... Accept Cancel Delete

You can add, delete or modify transaction dates and amounts. If you delete all the periods, you can clear and check the **Unearned Revenue** anew to create new schedule in the Revenue Schedule screen.








Planned, **Unearned** and **Sales** amounts are displayed at the bottom of the tab.


When the invoice generated by the **Auto Generate Contract Sales Documents** program or by the **Generate** button is updated the Sales Account is replaced with the **Unearned Revenue** account set up in the **Division Maintenance** program under the **Accounts Receivable Setup** menu. The account will not be replaced if the invoice is created manually in the **Invoice Data Entry** program.



S A/R Division Maintenance (SMD) 2/3/2017

Division No. 01    

Description EAST SALES OFFICE

Accounts Receivable	105-00-0100		Accts. receiv. - East Warehouse
Cash Sales	111-00-0000		Other Receivables
Discounts Allowed	950-02-0400		Discounts allowed
Freight	400-03-0100		Freight charges - East
Sales Tax	235-01-0000		Sales tax payable - East Cnty
Finance Charge	960-00-0400		Miscellaneous
Unearned Revenue	999-00-0100		Unearned Revenue 1


Post to Location 0200  West Sales Office

Accept Cancel Delete  

After running **Daily Sales Reports/Updates** from the **Sales Order Main** menu the Invoice amount is transferred to the **Unearned Revenue** account.

S Daily Transaction Register

Main Report

1 / 1 

Daily Transaction Register

SM demo Company (SMD)

Postings For: 2/6/2017

Source Journal	Account Number	Account Description/Posting Comment	Debit	Credit
SO-000063	105-00-0100	Accts. receiv. - East Warehouse	2,000.00	
		S/O Invoice Entry - 2/6/2017		
	999-00-0100	Unearned Revenue 1		2,000.00
		American Business REF: 0100273 BATCH: 00035		
Journal 000063 Totals:			2,000.00	2,000.00
Source SO Totals:			2,000.00	2,000.00
2/6/2017 Totals:			2,000.00	2,000.00
Report Totals:			2,000.00	2,000.00

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

The same transaction is seen on the **Unearned** tab of the **Contract Entry** screen:

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
02	2/6/2017	SD0063	American Business REF: 010027...	2,000.00-	999-00-0100	400-01-0200
04	4/26/2017			500.00		
07	7/27/2017			500.00		
10	10/26/2017			500.00		
01	1/26/2018			500.00		

\$ No Revenue Schedule ☐ Planned 2,000.00 Unearned 2,000.00- Sales 0.00

Quick Print Generation Copy From... Accept Cancel Delete

When running the **Revenue Recognition Register** program from the **Service Management Main** menu the amounts scheduled on dates falling before the **Posting Date** will be transferred to Sales Account.

S Unearned Revenue Recognition Register (SMD) 2/6/2017 ? x

Current General Ledger Period Ending
Service Management Posting Date

Notice: This Service Management posting date falls into a future General Ledger period.

Adobe PDF

S Daily Transaction Register - [] x

Main Report

1 / 1

Daily Transaction Register

SM demo Comapny (SMD)

Postings For: 5/6/2017

Source Journal	Account Number	Account Description/Posting Comment	Debit	Credit
SM-000026	400-01-0200	Distribution sales - West S/M Revenue Recognition		500.00
	999-00-0100	Unearned Revenue 1 S/M Revenue Recognition	500.00	
Journal 000026 Totals:			500.00	500.00
Source SM Totals:			500.00	500.00
5/6/2017 Totals:			500.00	500.00
Report Totals:			500.00	500.00

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

S Account Maintenance (SMD) 2/6/2017

Account No. 999-00-0100 Description Unearned Revenue 1

1. Main 2. History 3. Variance 4. Transactions Fiscal Year 2017

Per	Date	Journal	Posting Remark	Debit	Credit
02	2/3/2017	SO-000058	American Business REF:...		2,000.00
02	2/6/2017	SO-000061	American Business REF:...		100.00
02	2/6/2017	SO-000061	American Business REF:...		120.00
02	2/6/2017	SO-000061	American Business REF:...		170.00
02	2/6/2017	SO-000062	American Business REF:...		100.00
02	2/6/2017	SO-000062	American Business REF:...		120.00
02	2/6/2017	SO-000062	American Business REF:...		170.00
02	2/6/2017	SO-000063	American Business REF:...		2,000.00
05	5/6/2017	SM-000026	S/M Revenue Recognition	500.00	

Beginning	Debit	Credit	Net Change	Ending Balance
0.00	500.00	4,780.00	4,280.00-	4,280.00-

Accept Cancel Delete

S Journal Drill Down

Journal No. SM-000026 S/M Revenue Recognition Posting Date 5/6/2017

Updated On 2/6/2017 Updated At 12:18 pm Updated By useriig

Account No.	Description	Debit	Credit	Comment
400-01-0200	Distribution sales - West		500.00	S/M Revenue Rec...
999-00-0100	Unearned Revenue 1	500.00		S/M Revenue Rec...

OK

A new record with **Posting Remark: S/M Revenue Recognition** will appear on the Unearned tab of **Contract Entry** screen:

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
02	2/6/2017	SD0063	American Business REF: 0100273 B...	2,000.00-	999-00-0100	400-01-0200
04	4/26/2017			500.00		
05	5/6/2017	SM0026	S/M Revenue Recognition	500.00	999-00-0100	400-01-0200
07	7/27/2017			500.00		
10	10/26/2017			500.00		
01	1/26/2018			500.00		

\$ No Revenue Schedule ☐ Planned 2,000.00 Unearned 2,000.00- Sales 500.00

Quick Print Generation Copy From... Accept Cancel Delete

The **Revenue Recognition Register** will recognize all the amounts scheduled by dates falling before the Posting Date if there is enough invoiced amount. To check if the amount invoiced by the moment of recognition is enough, look at the **Unearned** and **Sales** fields at the bottom of the **Unearned** tab. If the amount of **Unearned** is more than the amount of **Sales**, the difference can be used for revenue recognition.

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000191 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date 10/26/2017 Trans. Amt. 500.00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
02	2/6/2017	SD0063	American Business REF: 0100273 BAT...	2,000.00-	999-00-0100	400-01-0200
04	4/26/2017			500.00		
05	5/6/2017	SM0026	S/M Revenue Recognition	500.00	999-00-0100	400-01-0200
07	7/27/2017			500.00		
10	10/26/2017			500.00		
10	10/30/2017	SM0027	S/M Revenue Recognition	1,000.00	999-00-0100	400-01-0200
01	1/26/2018			500.00		

\$ No Revenue Schedule ☐ Planned 2,000.00 Unearned 2,000.00- Sales 1,500.00

Quick Print Generation Copy From... Accept Cancel Delete

The **No Revenue Schedule** checkbox can be selected to postpone the revenue scheduling (the **No Revenue Schedule** and the **Unearned Revenue** should be checked together). The amount and the period of payment during the contract accomplishment will be set after invoice generation for the current contract.

On the **Unearned** tab, check the **No Revenue Schedule**.

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000192 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date 5/8/2017 Trans. Amt. 500.00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
05	5/8/2017			500.00		
08	8/8/2017			500.00		
11	11/7/2017			500.00		
02	2/7/2018			500.00		

No Revenue Schedule ☒ Planned 2,000.00 Unearned 0.00 Sales 0.00

Quick Print Generation Copy From... Accept Cancel Delete

Click the **Generation** button and generate an Invoice by the Amount Planned.

After running **Daily Sales Reports/Updates** from the **Sales Order Main** menu the amount is transferred to the Unearned Revenue account.

The transaction and the new schedule are displayed on the **Unearned** tab of the **Contract Entry** screen:

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000192 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date 2/6/2017 Trans. Amt. 2,000.00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
02	2/6/2017	SD0064	American Business REF: 0100274 BAT...	2,000.00-	999-00-0100	400-01-0200
02	2/6/2017			2,000.00		
05	5/8/2017			500.00		
08	8/8/2017			500.00		
11	11/7/2017			500.00		
02	2/7/2018			500.00		

No Revenue Schedule ☒ Planned 4,000.00 Unearned 2,000.00- Sales 0.00

Quick Print Generation Copy From... Accept Cancel Delete

After updating the Unearned Revenue Register the entire Invoiced Amount posted to Unearned Revenue Account is transferred to Sales Account.

S Unearned Revenue Recognition Register

Main Report

Unearned Revenue Recognition Register

SM demo Company (SMD)

Contract Number 000000192 Account Number 999-00-0100 400-01-0200

REGISTER NO: SM-000028

	Debit	Credit
Unearned Revenue	2,000.00	
Distribution sales - West		2,000.00
Contract 000000192 Totals:	2,000.00	2,000.00

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000192 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date 2/6/2017 Trans. Amt. 2,000.00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
02	2/6/2017	SD0064	American Business REF: 0100274 BAT...	2,000.00-	999-00-0100	400-01-0200
02	2/6/2017			2,000.00		
02	2/6/2017	SM0028	S/M Revenue Recognition	2,000.00	999-00-0100	400-01-0200
05	5/8/2017			500.00		
08	8/8/2017			500.00		
11	11/7/2017			500.00		
02	2/7/2018			500.00		

No Revenue Schedule ☒ Planned 4,000.00 Unearned 2,000.00 Sales 2,000.00

Quick Print Generation Copy From... Accept Cancel Delete

In this case the Planned Amount is increased by the Amount recognized during Unearned Revenue Register update.

If the **Contract Type** is Fixed Hours and there are closed Dispatches for current Contract the **Calculation Schedule** button becomes available on the Unearned Revenue tab allowing to recalculate the Amounts in case the Total Fixed Hours on the Contract differ from the actual hours of the closed Dispatch.

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000193 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date Trans. Amt. .00 OK Undo Del

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
05	5/8/2017			500.00		
08	8/8/2017			500.00		
11	11/7/2017			500.00		
02	2/7/2018			500.00		

☒ No Revenue Schedule ☒ Planned 2,000.00 Unearned 0.00 Sales 0.00

Calculation Schedule

Quick Print Generation Copy From... Accept Cancel Delete

Upon pressing the Calculation Schedule button a new line is added into the Revenue Schedule records with the Transaction Amount calculated based on the following conditions:

- If the Contact Total Amount is greater than the Planned Amount and the total hours of the closed Dispatches is greater than the Contract Total Fixed Hours a new line is added with the Trans. Amount equal to "Contract Amount - Planned Amount".
- If the total hours of the closed Dispatches is less or equal the Contract Total Fixed Hours a new line is added with the Transaction Amount calculated as: $(\text{Dispatch Hours} * \text{Total Amount} / \text{Total Fixed Hours}) - \text{Planned Amount}$.

S Contract Data Entry (SMD) 2/6/2017

Contract No. 000000193 NTC NBT Install Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Unearned Revenue ☒ Date 2/6/2017 Trans. Amt. 250.00

Per	Date	Journal	Posting Remark	Trans. Amt	Unearned Acc.	Sales Acc.
02	2/6/2017			250.00		
05	5/8/2017			500.00		
08	8/8/2017			500.00		
11	11/7/2017			500.00		
02	2/7/2018			500.00		

No Revenue Schedule ☒ Planned 2,250.00 Unearned 0.00 Sales 0.00

Quick Print Generation Copy From... Accept Cancel Delete

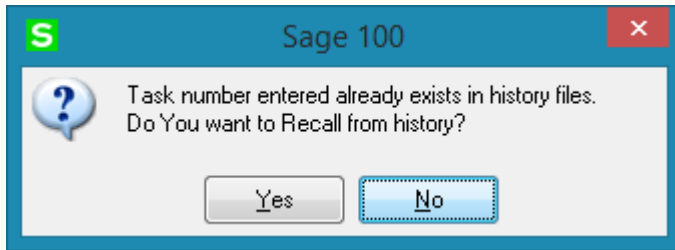
Task Data Entry

Header Tab

Task Data Entry is used for entry of tasks to be dispatched in response to calls received from customers. Tasks can be also generated automatically by the following programs:

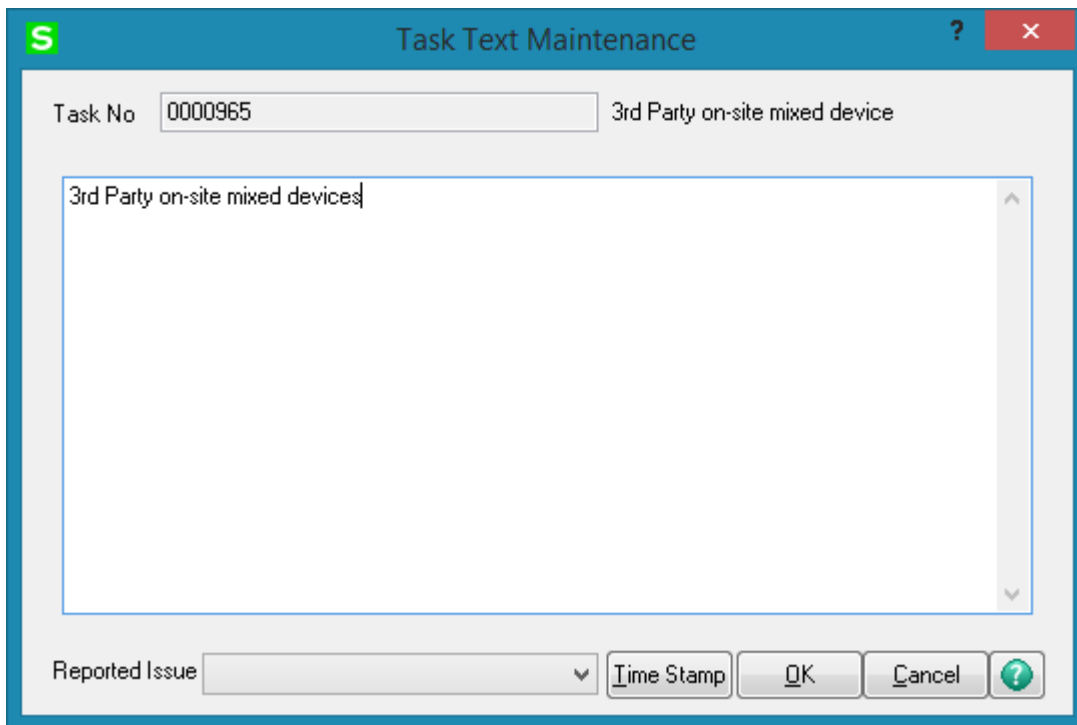
- Tasks (detailing installation steps) generated from the Sales Order Header.
- Tasks generated for special items from the Sales Order Lines.
- Tasks generated for Preventive Maintenance by the Auto Generate Task Selection program.

Enter a Task number, or click the Lookup button to list all active task numbers. Click the Next Number button to automatically increment the task number for a new task. Click the **Recall From History** button to view History tasks and recall the one you need. When manually entering a Task number that is already in the History a prompt appears allowing the user to recall the Task from History:



Enter the **Description** for the task to be performed. The program allows for entry of extended description.

Click the **Extended Task Description** button to enter more detailed description in the Task Text Maintenance. More than 4096 characters can be entered and saved as the Task's extended description.



Press the Comment button to open the Comment Text screen with Contract Comments loaded from the Contract Item for which Task is generated. The Comments can be edited for a Task.

By default, the system sets the **Task Date** and **Time** to the current date and time. You can change it.

The Task Type is defaulted from the Service Management Options and can be changed for individual task. You may enter the Task type or select it from the Task Type lookup list. Task Type indicates the type of the task to be performed. It is a required field for Task Entry.

When entering new task, the customer you select may have exceeded his credit limit. In this case, a warning with **Over Credit Limit** is displayed.

Customer Credit History

Customer No. 01-ABF American Business Futures Recalc Aging

Salesperson 0100 Jim Kentley Customer Credit Limit Is Exceeded

Credit Limit	A/R Balance	Open Order	Over By
1,200.00	41,129.25	19,398.24	59,327.49

Current	30 Days	60 Days	90 Days	120 Days
33,863.90	.00	.00	.00	7,265.35

Avg Days Pay/Overdue	4 / 0	Date Last Statement	4/30/2003
Date Established	1/1/2002	Highest Balance	850.00
Last Activity Date	2/6/2017		
Last Payment Date	5/31/2003	Date Last Finance Charge	4/30/2003
Last Payment Amount	864.25	Unpaid Finance Charge	43.89
Date of Last Aging	5/10/2007		

OK ?

The **Deposit Payment Type** is defaulted from the Customer and can be changed on the Task.

Deposit Payment Type: NONE ▼

- NONE
- CREDIT CARD
- CASH
- CHECK

Upon selecting Credit Card, focus moves to the **Payment** tab where the user can enter the credit card information and submit the transaction to Sage Exchange. If the default payment type is Credit Card and the customer is assigned a primary Card ID in Customer Maintenance, this field defaults to Credit Card and can be changed on the Task.

Task Total and **Tax** fields are populated from Dispatches created for current Task. **Task Total** field is populated with the sum of Dispatch Totals and **Tax** field is populated with the sum of Tax amounts calculated for the Dispatches.

Task Status is defaulted to **Entered** when new Task is created. Once the status of a Task is set to "C" (Closed) meaning the task is closed, it will no longer appear on the Task List. If you keep Task History, the task will be transferred into the history.

The **Task Status** hyperlink opens the **Task/Dispatch Status Maintenance** allowing the user to add new status if necessary.

Contract Number field allows the user to assign a contract number to current task. You can select any existing contract using the Lookup button (the Template contracts are not displayed in the lookup). If the **Contract is Required** option is turned on in the **Service Management Options**, the Task cannot be accepted without a Contract number assigned to it. Any revenues or expenses related to this task will be posted to the specified contract.

The **Contract Memo** button allows viewing/editing the Contract memos.

Job Site Code- You may enter the code of the Customer's **Job Site Code** represented by the Customer's Master File Ship-to Address Code. You may see all the possible job site addresses or add a new Job Site Code by clicking the **Job Site Code** hyperlink.

If the **Ship-to Address** has the **Calculate taxes on Labor** option (shown if corresponding option is set in the **Service Management Options**) selected, the **Tax Class** will be set for each Labor line of Dispatches and carried over to the generated document when closing a Dispatch.

The **Salesperson** field is defaulted from Customer and can be changed for individual Task. The Salesperson entered on the Task is loaded to the Sales Order/Invoice generated when closing the Dispatch.

A screenshot of a form with the following fields and values:

Cust PO	
Priority Code	
Bill Freq Code	1
Route	A01
StopNo	1

Enter the **Customer Purchase Order** number for this task.

Enter desired **Priority Code** for the task. **Priority Code** is used as a search term for the task.

Bill Freq Code denotes a scheme of Billing Frequency. The code is displayed, as it is set for a customer, and can be changed if needed.

Route - this field is populated when Task is created for a Contract having **Route** assigned. **Stop No** (used in SMP mobile) field is populated on the Tasks auto generated for Contract Items having PM schedule setup.

A screenshot of the 'Task Data Entry (SMD) 2/6/2017' interface. The header bar is blue with a green 'S' logo. Below the header, there are several input fields and buttons:

- Task No. 0000965
- Task Description: 3rd Party on-site mixed device
- Navigation buttons: 1. Header, 2. Address, 3. Dispatches, 4. Payment
- User: useriig
- Task Date: 2/6/2017
- Task Time: 04:36 PM
- Task Type: Installation
- Customer No: 01-ARF
- Buttons: Create Additional Tasks, Search, Print, etc.

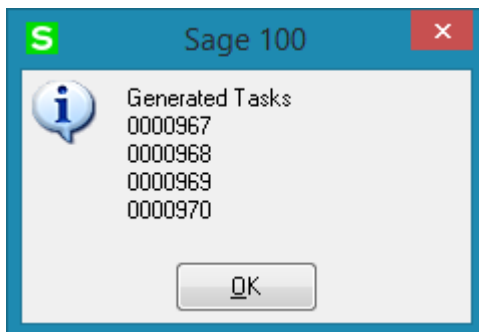
If the task is of a type, for which the **Create Additional Task** box is checked in the **Task Type Maintenance**, the Create Additional Tasks button becomes enabled allowing the user to automatically generate additional tasks.

Additional tasks will have all the fields taken from the initial task, except for the Task Type and Description.

Press the **Create Additional Tasks** button.

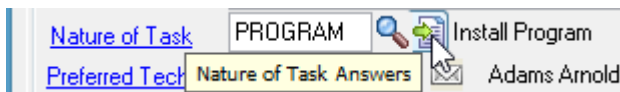


Upon pressing Yes a message is popup showing the numbers of the generated Tasks:



Enter the **Nature of Task**, using a code entered in the **Nature of Task Maintenance** screen. It must be a code corresponding to the Task Type. The **Nature of Task** code you enter is used later when displaying the list of technicians available to be assigned to the task.

The button next to the Nature of Task lookup allows for opening the Nature of Task Answers screen populated with questions (text) entered in the Nature of Task Maintenance and blank text fields for entering the answers.



S Nature of Task Answers

TaskType Installation

Nature of Task Install Program

Confirm to:	J.Quin
Install on all workstations?	No, only on the server
Order taken by:	A.Arnolds

OK

The Nature of Task questions and answers are printed on the Task Report printed by the Quick print button.

S Task Printing

Main Report: [?] [1] /1 [Icons]

Task Printing

SM demo Comapny (SMD)

Task Number: 0000965		Preferred Tech: Adams Arnold
Task Date: 2/6/2017	Task Time: 4:36:00PM	Task type: Installation
Customer Number: 01-ABF		Nature of Task: PROGRAM
		Task Status: Entered
		Task Priority:
		Contract Number: 000000191

Duke University Medical Center 324 Blackwell St	Duke University Medical Center 324 Blackwell St
Durham, NC 27708	Durham, WI 27708

Task Description: 3rd Party on-site mixed devices

Comment: Contract is renewed

Confirm to: J.Quin
 Install on all workstations? No, only on the server
 Order taken by: A.Arnolds

When ready for invoicing, please sign and turn into accounting department. **Task Total :** 0.00

Dispatcher Signature: _____

Date Completed: _____

Date Invoiced: _____ Invoice Number: _____

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

Preferred Tech. ADAM    Adams Arnold

Preferred Mach. Text Message E-mail

You may enter the Technician Code for the customer's **Preferred Technician** for this task. By using the Lookup button, you can see the technicians qualified to perform this task

based on the Nature of Task's required skills. If the **Nature of Task** has **Technician Code** assigned, it will be loaded when selecting the **Nature of Task**.

If the **Auto Load Technician** box is checked in the **Service Management Options**, the **Preferred Technician** will be automatically loaded in all the Dispatches.

If the **Auto Load Technician** box is cleared, the program will not load the Preferred Technician to the new created Dispatch.

The **Email** button next to the Technician lookup button allows for sending a text message to the email address specified for text message in the **Technician Code Maintenance**.

Enter the **Item Number** reported by the customer identifying the product in need of service. If the Task is generated for a Contract Item by the Auto Generate Tasks Selection program the Item Number is automatically loaded with respective Response and Coverage Codes specified in the Contract Items screen.

If the item reported by the customer has a **Lot/Serial Number**, you may enter it in the corresponding field.

An item is considered to be on customer's history if it has been sold to him, no matter from SM or SO.

First, the **Track Customer Site Inventory** option should be selected for the item on the **Additional** tab of the **Item Maintenance**.

Second, the **Retain Lot/Serial Sales History** option should be set to **Both Lot & Serial Items** on the **History** tab of the **Sales Order Options**, to enable saving history for Lot/Serial items.

The **List Inventory Items From Contract** button opens the list of Inventory Items from the Contract Items table. This button is available if there is Contract assigned to the Task.

The binoculars button opens the list of items sold to current customer:

The screenshot shows a window titled "SM Customer Item Sales History". It contains a table with the following data:

Item Code	Description	CustomerNo	Invoice No	Lot Serial No
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	01-ABF	0100261	
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	01-ABF	0100184	
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	01-ABF	0100211	
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	01-ABF	0100225	
2480-8-50	DESK FILE 8" CAP 50	01-ABF	0100064	JAN10
2480-8-50	DESK FILE 8" CAP 50	01-ABF	0100087	11
2480-8-50	DESK FILE 8" CAP 50	01-ABF	0100110	JAN10
2480-8-50	DESK FILE 8" CAP 50	01-ABF	0100119	JAN10
6655	PRINTER STAND W/ BASKET	01-ABF	0100132	
6655	PRINTER STAND W/ BASKET	01-ABF	0100259	
6655	PRINTER STAND W/ BASKET	01-ABF	0100260	
BEL2850	Printer Unit	01-ABF	0100259	
BEL2850	Printer Unit	01-ABF	0100260	
D1400	Door Installation	01-ABF	0100129	

Below the table is a search section with a "Search" label, a dropdown menu set to "Item Code", a "Begins with" dropdown, a text input field, and a "Find" button. There is also a "Filters..." button. At the bottom of the search section are "Custom..." and "Lookup Wizard..." buttons. To the right of these are "Select", "Cancel", and three icons (a green checkmark, a printer, and a question mark). At the very bottom, a status bar indicates "Found 30 records".

If there is **Item Number** entered on the **Task Data Entry** screen the **Item History** button allows you to open the **Item History Display** screen and view the tasks performed for current Item number as well as the specified Lot/Serial number.

Customer No. 01-ABF American Business Futures

Item Code 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

Lot/Serial

Task Status All

Task No.	Task Date	Task Type	Task Status	Nature of Task	Preferred Tech.
0000851	2/14/2014	Installation	Closed		Santana Juan
0000965	2/6/2017	Installation	Entered	PROGRAM	Adams Arnold
0000966	2/6/2017	Service Call	Entered		
0000967	2/6/2017	Service Call	Entered	PROGRAM	Dixon Michael
0000968	2/6/2017	Service Call	Entered	PROJECT	Williams Allen
0000969	2/6/2017	Support Call	Entered	WARRANTY	Wilson James
0000970	2/6/2017	Service Call	Entered	PROJECT	Williams Allen
0000972	2/6/2017	Service Call	Entered		
0000973	2/6/2017	Service Call	Entered		
0000974	2/6/2017	Service Call	Entered		
0000975	2/6/2017	Service Call	Entered		

Task Zoom

OK

From the **Task Status** drop-down box, select if you want to view **All**, **Non Closed**, or **Closed** tasks.

The **Task Zoom** button displays **Task Inquiry** for the selected Active tasks (Non Closed Statuses) and **Task History Inquiry** for the selected Closed tasks.

The **List Inventory Items by Contracts** button allows the user to search for an Item Number across contracts.

Item Number 1001-HON-H252

Lot/Serial No.

List Inventory Items by Contracts

Upon pressing the button the Items by Contracts list is opened allowing the user to search the contracts of the selected Customer by Item Number.

Item Code	Contract No.	Customer No.	Lot/Serial ...	Starting Date	Ending Date
LEATHER DASH	000000018	01-ABF			6/14/2002
LTHR SDE PANELS	000000018	01-ABF			6/14/2002
LUGGAGE RACK	000000018	01-ABF			6/14/2002
2480-8-50	000000040	01-ABF	JAN10	11/20/2008	11/21/2015
1001-HON-H252	000000174	01-ABF		2/14/2014	2/14/2015
1001-HON-H252	000000191	01-ABF		1/25/2017	1/26/2018
2480-8-50	000000191	01-ABF	FEB-203	1/25/2017	1/26/2018
6655	000000191	01-ABF		1/25/2017	1/26/2018
1001-HON-H252	000000192	01-ABF		2/6/2017	2/7/2018
2480-8-50	000000192	01-ABF	FEB-203	2/6/2017	2/7/2018
6655	000000192	01-ABF		2/6/2017	2/7/2018
1001-HON-H252	000000193	01-ABF		2/6/2017	2/7/2018
2480-8-50	000000193	01-ABF	FEB-203	2/6/2017	2/7/2018
6655	000000193	01-ABF		2/6/2017	2/7/2018

Search: Item Code [v] Begins with [v] [Find]

Filters... [Custom... Lookup Wizard...]

Found 17 records

The **Default Misc Item** is defaulted to the one selected in the **Service Management Options**. Upon creating a **Dispatch** this Misc Item Code is automatically loaded into the Dispatch line.

After selecting the customer, the **Territory** field is loaded automatically from the **Customer Maintenance** or **Customer Ship To Address Maintenance** screens. It can also be entered manually for the task.

Check the **Separate Invoice** box, if you want separate invoices generated for each task of the same Contract during Auto Invoice Generation.

The **Equipment** button allows for entry of all the Equipment for current Task. Upon pressing the **Equipment** button **Task Equipment Maintenance** is opened with the current Task number selected.

	Equipment Code	Serial Number	Contract No.	Labor Code	Tech. 1	Tech. 2	Tech. 3	Tech. 4	Tech. 5	Include
1	1001-HON-H252	FEB-203	000000174	WARRANT	ADAM	BRN	DAVI			<input checked="" type="checkbox"/>
2	2480-8-50	FEB-203	000000191	WARRANT	ADAM					<input checked="" type="checkbox"/>
3										<input type="checkbox"/>

The following information can be entered here:

Equipment Code (like the Item Code with lookup)

The first lookup (**Items by Contracts**) button allows for opening the list of all Items by Contracts for the customer selected on current Task.

Item Code	Contract No.	Customer No.	Lot/Serial No.	Starting Date
1001-HON-H252	000000174	01-ABF		2/14/2014
1001-HON-H252	000000191	01-ABF		1/25/2017
1001-HON-H252	000000192	01-ABF		2/6/2017
1001-HON-H252	000000193	01-ABF		2/6/2017
2480-8-50	000000191	01-ABF	FEB-203	1/25/2017
2480-8-50	000000192	01-ABF	FEB-203	2/6/2017
2480-8-50	000000193	01-ABF	FEB-203	2/6/2017
2480-8-50	000000040	01-ABF	JAN10	11/20/2008
6655	000000191	01-ABF		1/25/2017
6655	000000192	01-ABF		2/6/2017
6655	000000193	01-ABF		2/6/2017
ARS-9401	000000014	01-ABF		1/25/2017
CHROME KIT	000000014	01-ABF		2/6/2017
LEATHER DASH	000000018	01-ABF		2/6/2017

The second lookup button lists all Inventory Items.

Serial Number is a text field entered manually.

Contract No – is automatically loaded when selecting an Item from Items by Contract lookup.

Labor Code – is the **Default Labor Code** loaded from the **Service Management Options** if specified. If no **Default Labor Code** is specified in the S/M Options the labor Code field is blank and you can select a Labor Code if you want Labor lines for each Technician (**Tech. 1-Tech. 5**) to be added in the Dispatch Labor Charge Entry when creating Dispatch.

For generating a Dispatch it is necessary to have Technician code selected for **Tech1** field and the **Include** box checked on the lines for which you want to generate Dispatches. The Equipment line cannot be included in the Dispatch generation if no technician is selected in the **Tech 1** field.

The **Tech1** is defaulted to the Task's **Preferred Technician** upon selecting the equipment code.

The **Technician Code** entered in the **Tech 1** field is loaded into the **Technician** field of the generated Dispatch.

Labor lines with respective Labor Code and Technician codes (Tech 1 –Tech 4) will be created for a generated Dispatch if there is a Labor Code and different Technician codes selected for a line included in the Dispatch generation.

Task No. 0000965

Quick Row 3

	Equipment Code	Serial Number	Contract No	Labor Code	Tech. 1	Tech. 2	Tech. 3	Tech. 4	Tech. 5	Include
1	1001-HON-H252		000000174	WARRANT	ADAM	BRN	DAVI			<input checked="" type="checkbox"/>
2	2490-8-50	FEB-203	000000191	WARRANT	ADAM					<input checked="" type="checkbox"/>
3										<input type="checkbox"/>

Create Dispatch Accept Cancel

Sage 100

Generation successfully completed for all included lines.

OK

Here is an example of the Dispatch with Labor lines generated from Task Equipment Maintenance:

S Dispatch Data Entry (SMD) 2/6/2017

Task No. 0000965 3rd Party on-site mixed device

Dispatch No. 0001

1. Header | 2. Lines | 3. Payment | User useriig

Dispatch Date 2/6/2017 [Dispatch Status](#) 0 Open

Starting Date 2/6/2017 Starting Time 04:36 PM Commit Quantity ☒

Ending Date 2/6/2017 Ending Time 06:28 PM

[Technician](#) ADAM Adams Arnold

[Machine](#)

[Equipment No.](#) 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

[Contract No.](#) 000000174 Installation Support

Deposit Payment Type CHECK CHECK

Check Number

Deposit Amount .00

Discount Rate	.000%
Discount Amount	.00
Freight Amount	.00
Sales Tax Amount	3.99
Dispatch Total	190.24
Lines Total	55.00
Labor Total	131.25

Quick Print RMA Labor Accept Cancel Delete

The **Technician Code** entered in the **Tech 1** field is loaded in the Technician field on the Dispatch Header.

The **Equipment Code** specified in the **Task Equipment Maintenance** is loaded into the **Equipment No** field on the Dispatch header.

Labor Lines are added in the Labor Charge Entry:

S Labor Charge Data Entry (SMD) 2/6/2017

Task No. 0000965 Dispatch No. 0001 Dispatch Date 2/6/2017 Starting 2/6/2017 04:36 PM
Ending 2/6/2017 06:28 PM

Contract Hours 95:45

Start Quick Row 1

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	WARRANT	ADAM	1.75	55.000	96.25
2	WARRANT	BRN	.25	55.000	13.75
3	WARRANT	DAVI	.25	85.000	21.25
4			.00	.000	.00

Description	Warranty Services
Tax Class	NT
Disc %	0.000
Over. Start Date	2/6/2017
Over. Start Time	04:36 PM
Retainer Factor	1.00

Total Amount 131.25

Accept Cancel Delete

The Labor Charge Data Entry programs have been modified to keep Technician Codes and Technician Names in the "TechnicianCodeList" and "TechnicianNameList" fields added in the Dispatch Header table which is available in the [Equipment Board](#).

The **RMA** button added on the Dispatch Data Entry screen allows for launching the RMA Entry with the Equipment number loaded in the RMA lines:

RMA Entry (SMD) 2/6/2017

RMA Number: 0000033

1. Header | 2. Address | 3. Lines

	Invoice No.	Item Code	Return Reason	Cust Action	Return Qty	Item Action	Rep
1		1001-HON-H252	DEFECTIVE	Replacemer	.00	Stock	1001-H
2					.00		

Quick Row: 1

Description: HON 2 DRAWER LETTER FLE W/O LK
 Vendor Action: Replacement
 Vendor No.: 01-CONT
 MOE Issues:

Quick Print... Express Sales Order... Accept Cancel Delete

Use the **Defaults** button to enter the **Default Values for Task Data Entry** screen and specify default values like **Task Type** or **Task Date** for the current entry session.

Task Data Entry (SMD) 2/6/2017

Task No.:

Defaults...

Default Values for S/M Task Data Entry

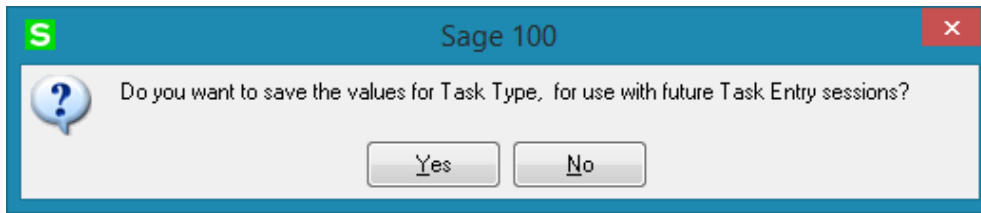
Next Task No.: 0000983

Task Date: 2/6/2017

Task Type: Installation

OK Cancel

If the Task Type is changed in the Default values screen the user is asked for confirmation to use the new value for further Task entry sessions.



Select the **Response** code to specify the number of hours for accomplishing the task. You can use the Lookup button to list available Response codes.

A screenshot of the Sage 100 task entry form. It has a light gray background. On the left, there are three sections: 'Response' with a dropdown set to 'STD' and a 'Lookup' button; 'Coverage' with a dropdown set to 'HSRV' and a 'Lookup' button; and 'Quote Amount' with a text box containing '1,200.00' and a 'Lookup' button. On the right, there are two rows: 'Scheduled Date' with a date picker set to '2/6/2017' and a 'Time' dropdown set to '04:36 PM'; and 'Due Date' with a date picker set to '2/11/2017' and a 'Time' dropdown set to '06:36 PM'. Below these is a 'Quote Hours' text box containing '120.00' and a 'Disp' button.

Select the **Coverage** code to specify the coverage hours for each weekday. Use Lookup button to list the available Coverage codes.

Enter the **Scheduled Date/Time** of the task to start. The SM module Date is set by default. The **Due Date/Time** of the task will be calculated automatically based on the entered Scheduled Date/Time, Response and Coverage codes.

Enter **Quote Hours** and **Quote Amount** for the task. If entered, the difference between the quoted hours/amount and hours/amount actually spent will be displayed in the **Labor Charge Data Entry** screen as unused **Quote Hours** and **Quote Amount**.

The **Disp** button allows for creating new Dispatch.

Click the **Quick Print** button to print a report on the task using **Crystal Task Printing**.

A screenshot of the Crystal Task Printing dialog box. The title bar is blue with a green 'S' icon and the text 'Crystal Task Printing'. The dialog box has a light gray background. At the top left is a 'Task Form Code' dropdown set to 'STANDARD' with a 'Lookup' button. To the right is a 'Save' button. Below this is a 'Description' text box containing 'Task Quick Print'. In the middle, there is a 'Number of Copies' spinner set to '1' and a 'Collated' checkbox. Below this is an 'E-Mail Sending' section. It has a 'Template Code' dropdown set to 'TEMP1' with a 'Lookup' button, and a 'Test Template' checkbox. To the right of this is a 'Default' checkbox which is checked. Below this are three rows: 'Send to Customer' with a checkbox and a text box containing 'artie@abf.com'; 'Send To Technician' with a checkbox and a text box containing 'Adam@hotmail.com'; and 'Send To Contact' with a checkbox and a text box containing 'john@abf.com'. At the bottom left is a dropdown set to 'Adobe PDF'. At the bottom right are three buttons: 'Print', 'Preview', and 'Setup'.

Here is an example of printout:

Task Printing

Main Report

Task Number: 0000965
Task Date: 2/6/2017
Customer Number: 01-ABF

Task Time: 4:36:00PM

Preferred Tech: Adams Arnold
Task type: Installation
Nature of Task: PROGRAM
Task Status: Entered
Task Priority:
Contract Number: 000000191

Duke University Medical Center
324 Blackwell St
Durham, NC 27708

Duke University Medical Center
324 Blackwell St
Durham, WI 27708

Task Description: 3rd Party on-site mixed devices

Comment: Contract is renewed
Confirm to: J.Quin
Install on all workstations? No, only on the server
Order taken by: A.Arnolds

Dispatch No.	Dispatch Date	Dispatch Tech.	Dispatch Contract Number	Dispatch Equipment No.
0001	2/6/2017	Adams Arnold	000000174	1001-HON-H252
/ADAMINSTALL	Installation Services		1.00	55.000 0.000 55.00
WARRANT	Warranty Services	Adams Arnold	1.75	55.000 0.000 96.25
WARRANT	Warranty Services	Brown John	0.25	55.000 0.000 13.75
WARRANT	Warranty Services	Davis Arnold	0.25	85.000 0.000 21.25
Total :				186.25
Taxable Amount :				55.00
Nontaxable Amount				131.25
Less Discount :				0.00
Freight :				0.00
Sales Tax :				3.99
Dispatch Total :				190.24

Current Page No.: 1 Total Page No.: 2 Zoom Factor: 100%

There is an option of emailing the Task printing PDF file to the Customer, Technician and Contact email addresses if exist. The E-mail button is enabled if there is at least one Send To option selected.

E-Mail Sending

[Template Code](#) TEMP1 Test Template Default ☒

Send to Customer ☒ E-mail, Alt-E artie@abf.com

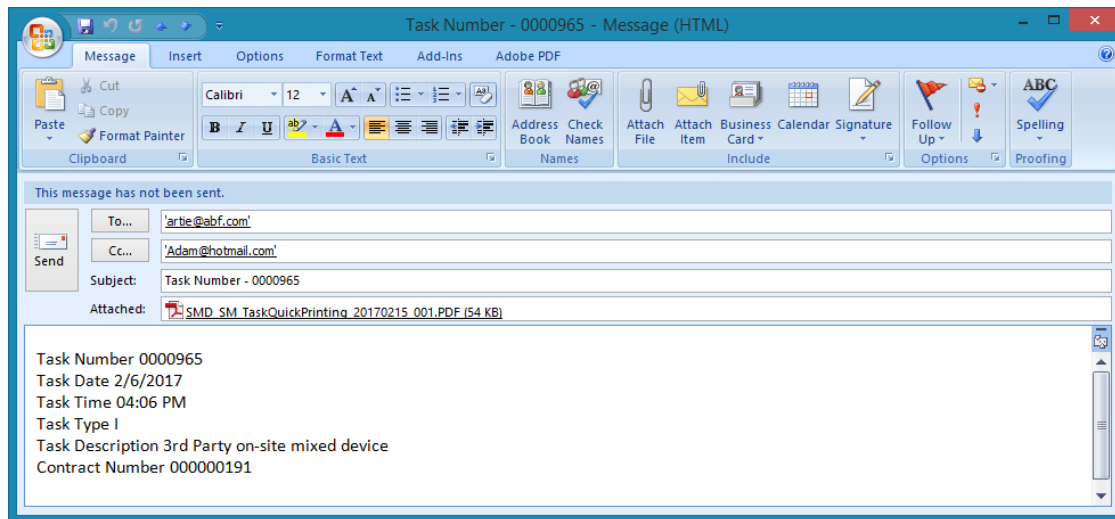
Send To Technician ☒ Adam@hotmail.com

Send To Contact ☐ john@abf.com

Adobe PDF

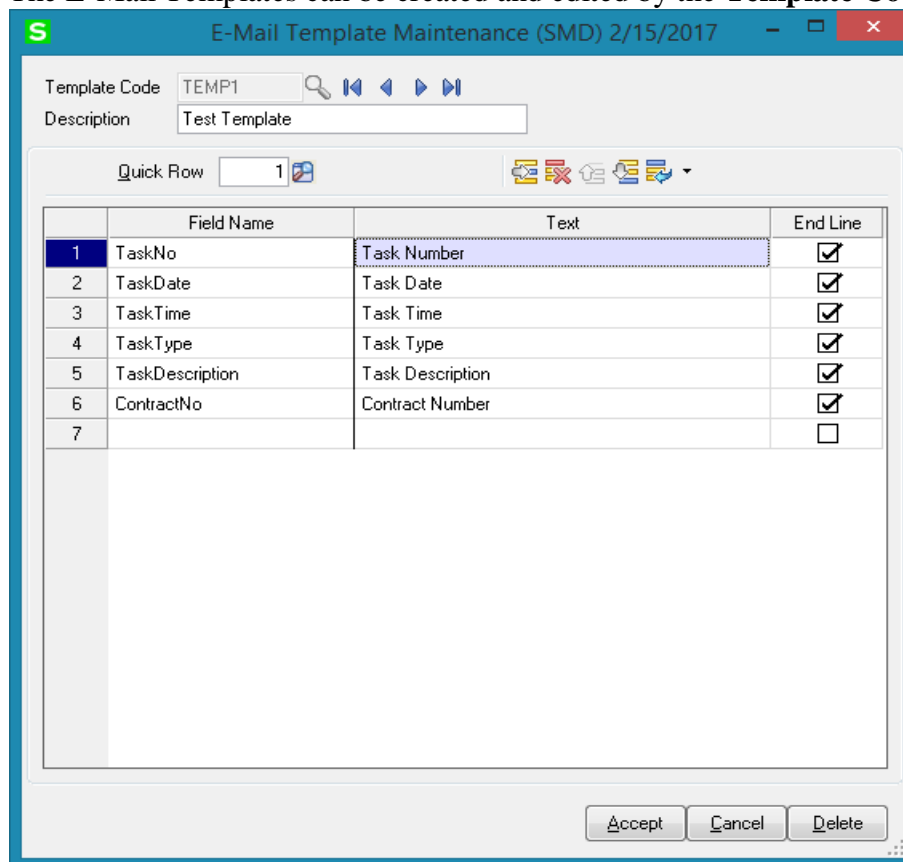
Print **Preview** **Setup**

Note: It is necessary to have Paperless Office setup properly and working in order to have the Task printing PDF attached while sending emails.



You can have multiple E-mail Templates for the text included in the e-mail body. In the **E-Mail Template Code** field, select the template. The **Default** check box indicates which Template is used by default when the **Crystal Task Printing** is run. The **E-Mail Template Code** is defaulted from S/M Options and can be changed for particular Task. Empty Template Code can also be set as Default. The setting of the Default will be saved only after the e-mail is sent.

The E-Mail Templates can be created and edited by the **Template Code** field hyperlink.



For the selected **Template Code**, select which fields values you want to add to the current line from the **Field** drop-down list. If you haven't entered Text for that field yet, clicking in the **Text** field will bring the name of the selected Field, which you can edit then.

You can add lines containing only Field (no Text), only Text (no Field), or completely empty lines.

By default, all the lines contain one Field at most, with one portion of Text only. To have more than one Text-Field pair in the same line, clear the **End Line** check boxes for all the lines to be merged, except for the last one.

You can arrange lines with the help of the **Move Up** and **Move Down** buttons.

Click the **RMA** button to create new RMA entry directly from the **Task Data Entry** screen.

The **Return Merchandise Authorization Entry** screen is opened with the **Next RMA Number** automatically selected.

RMA Entry (SMD) 2/15/2017

RMA Number: 0000034

1. Header | 2. Address | 3. Lines

RMA Date: 2/15/2017

Customer No.: 01-ABF

Contract No.: 000000191

RMA Status: New

Expire Date: 3/17/2017

Return Via: MAIL

Return To: 0000

Ship To: 2

Confirm To: John Quinn

Comment: Call Ed for credit approval.

E-mail: artie@abf.com

Fax No.:

Inspect on Receipt: ☐

Cross Ship: ☐

Apply Restocking Charges: ☒

Print Customer RMA: ☒

Print RMA Receiver: ☒

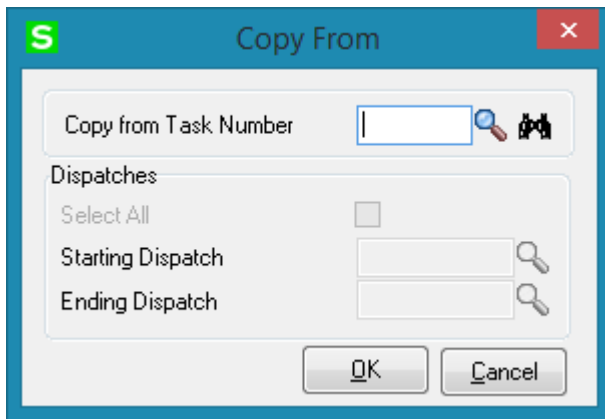
Quick Print... Express Sales Order... Accept Cancel Delete

The **Customer No.** is loaded from the Task. If the Task has an **Item** assigned, the item information is loaded into the **Lines** tab of the RMA Entry. When clicking the **Lines** tab,

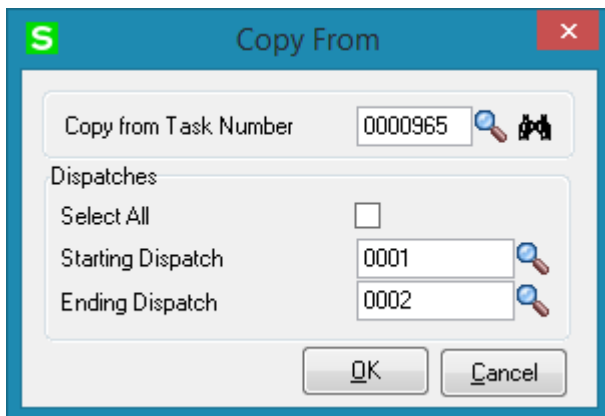
the item of the task is already selected. Select an invoice, make necessary changes to other fields, and accept the line.

Use the **Copy from** button if you want to copy information from an already existing task into a new one.

After assigning the next new task number, press the Copy From button and specify the source task in the following window. You may use the **Lookup** button to select the Task from active Tasks list or the binocular button to copy from a Task already closed and moved to the Task History.



There is also an option for copying the Dispatches from the selected Task.



Check **Select All** to copy all Dispatches or select the range of Dispatches.

The Dispatches of the specified Task will be copied with the Dispatch status set to the Default status set in the Service Management Options and the Starting and Ending Date/Time set to current Date/Time.

Press Ok to copy the selected Dispatches to the newly created Task.

Task Data Entry (SMD) 2/15/2017

Task No. 0000983 3rd Party on-site mixed device Defaults...

1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig

Task Date 2/15/2017 Task Time 05:27 PM Task Type I Installation

Customer No. 01-ABF American Business Futures

Deposit Payment Type CHECK CHECK Task Total 359.23 Tax 7.98

Task Status E Entered Salesperson 0100 Jim Kentley

Contract No. 000000191 Install

Job Site Code 2 American Business Futures

Job Site Contact John Quinn

Nature of Task PROGRAM Install Program

Preferred Tech. ADAM Adams Arnold

Preferred Mach.

Item Number 1001-HON-H252 HON 2 DRAWER LETTER FILE W/O I

Lot/Serial No. Territory ARIZON Region Arizona

Tax Schedule CA California Separate Invoice ☒

Default Misc Item ADAMINSTALL Installation Services Equipment...

Response STD Standard Response 24 hr

Coverage HSRV Work hours for services

Quote Amount 1,200.00

Scheduled Date 2/15/2017 Time 05:27 PM

Due Date 2/20/2017 Time 12:27 PM

Quote Hours 120.00 Disp

Documents Path \\Gohar\d\MAS\MAS2017\SMP\MAS90\Documents\Tasks\0000983

Quick Print BMA Copy From... Quick Email Text Message Accept Cancel Delete

The **Scheduled Date/Time** of the newly created Task is defaulted to the current Date/Time and the Due Date is recalculated based on the Response and Coverage codes. If there is no Response and Coverage codes specified the current date/time is set both for Scheduled and Due Dates.

The **Disp** button allows for launching the **Dispatch Data Entry** and creating new Dispatch.

The Starting and Ending Dates of the Dispatches created by copying are set to current Date/Time (S/M Module Date).

Quick Email button allows for sending email to the Task's Preferred Technician email address. This button is enabled if there is an email address for the Technician entered in the Technician Code Maintenance.

Upon sending an email a time stamped note will be added to the **Task Text Maintenance** if the **Add Note to the Task Text Maintenance** checkbox is selected in the **S/M Options**. A note is added also if the Dispatch Status is changed:

Task Text Maintenance

Task No: 0000983 3rd Party on-site mixed device

3rd Party on-site mixed devices
[useriig 2/17/2017 10:47:05 AM] Email sent to "Adam@hotmail.com"
[useriig2/17/2017 10:47:29 AM] Dispatch 0001 Status Changed from="O" to "P"

Reported Issue: [dropdown] Time Stamp OK Cancel ?

Address Tab

The **Customer Bill To** and **Ship To** address information is loaded here and the user can change it if needed.

Task Data Entry (SMD) 2/17/2017

Task No. 0000983 3rd Party on-site mixed device Defaults...

1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig

Customer No. 01-ABF American Business Futures Hours Copy Ship To

Bill To Address

Name Duke University Medical Center

Address 324 Blackwell St

ZIP Code 27708

City Durham State NC

Country USA United States

Telephone Ext

Ship To Address

Job Sit... 2

Name American Business Futures

Address Racine Warehouse

5411 Kendrick Place

ZIP Code 53120

City Racine State WI

Country USA United States


Telephone (414) 995-4319 Ext

Quick Print RMA Copy From... Quick Email Text Message Accept Cancel Delete

The **Bill To** field becomes visible if the **Enable Bill To Customer Reporting** option is turned on in the Accounts Receivable Options.

Customer No. American B

Bill To Address


[Bill To](#) 

Name

Address

ZIP Code

City State


Country  United States

Telephone Ext

The **Bill To** field is loaded with **Bill To Customer** number setup for the Task's Customer in the **Bill To/Sold To Maintenance**.

Changing the **Bill To Customer** is controlled by security role. Only the users assigned to a role with "**Allow Bill To Customer Number Override During S/O Entry**" security event enabled for Sales Order module in the Role Maintenance can change it. The **Bill To** field is disabled if the "**Allow Bill To Customer Number Override During S/O Entry**" security event is not enabled in the Role Maintenance

The **Hours** button opens the Customer Ship To Hours Inquiry:

S Customer Ship to Hours Inquiry 

Customer No. American Business Futures

Ship To American Business Futures

	Open Time	Close Time
Monday	<input type="text" value="8:00AM"/>	<input type="text" value="5:00PM"/>
Tuesday	<input type="text" value="8:00AM"/>	<input type="text" value="6:00PM"/>
Wednesday	<input type="text" value="8:00AM"/>	<input type="text" value="6:00PM"/>
Thursday	<input type="text" value="9:00AM"/>	<input type="text" value="6:00PM"/>
Friday	<input type="text" value="9:00AM"/>	<input type="text" value="5:00PM"/>
Saturday	<input type="text" value="9:00AM"/>	<input type="text" value="2:00PM"/>
Sunday	<input type="text" value="12:00AM"/>	<input type="text" value="12:00AM"/>

The **Copy Ship To** button allows for copying the **Ship To Address** fields to the respective fields of **Bill To Address**.

Dispatches Tab

Dispatches tab is intended for generating new dispatches and opening the existing ones. Press the **New Dispatching** button to open the **Dispatch Data Entry** screen for the selected task.

Task Data Entry (SMD) 2/17/2017

Task No. 0000984 3rd Party on-site mixed device Defaults...

1. Header 2. Address 3. Dispatches 4. Payment User useriig

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
--------------	---------------	------------	-----------------	--------

New Dispatching

Quick Print RMA Copy From... Quick Email Text Message Accept Cancel Delete

The **Dispatch Data Entry** screen is opened with current Task already selected and ready to add a new dispatch for the task. Press the **Next Dispatch No** button to create a Dispatch. After entering a dispatch; you can continue working with the **Dispatch Data Entry** as usually.

Dispatch Data Entry (SMD) 2/17/2017

Task No. 0000984

Dispatch No.

1. Head | 2. Service | 3. Payment

User

Dispatch Date

Dispatch Status

Starting Date

Starting Time 12:00 AM

Ending Date

Ending Time 12:00 AM

Commit Quantity

Technician

Machine

Equipment No.

Contract No.

Deposit Payment Type NONE

Check Number

Deposit Amount .00

Discount Rate	.000%
Discount Amount	.00
Freight Amount	.00
Sales Tax Amount	.00
Dispatch Total	.00
Lines Total	.00
Labor Total	.00

Quick Print RMA Labor Accept Cancel Delete

The **Dispatches** tab shows all the dispatches created for current task. Information on that screen reflects the dispatch numbers, dispatch dates, technician codes, technician names and dispatch status.

Task No. 0000984 3rd Party on-site mixed device Defaults...

1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	2/17/2017	ADAM	Adams Arnold	Open

Dispatching

Quick Print BMA Copy From... Quick Email Text Message Accept Cancel Delete

Clicking the **Dispatching** button opens the selected dispatch in the **Dispatch Data Entry** screen.

Double-clicking a dispatch line or pressing the Dispatching button opens the **Dispatch Inquiry** screen if the **Status** of the selected dispatch is **Closed**, and the **Dispatch Data Entry** for all the other statuses.

Payment Tab

Payment ID - Enter a card ID to identify the credit card, or click the Lookup button to view a list of all card IDs for this customer. The primary card ID automatically defaults if the default payment type is Credit Card and the customer is assigned a primary card ID in Customer Maintenance, but it can be changed.

Click Clear to clear the information on the Credit Card tab.

The screenshot shows the 'Task Data Entry (SMD) 2/17/2017' window. The 'Payment' tab is selected. The 'Task No.' is 0000984, and the '3rd Party on-site mixed device' is selected. The 'User' is 'useriig'. The 'Payment ID' is '*AMEX*2376' with a 'Lookup' button and a '**New**' checkbox. The 'Payment Type' is 'AMEX' with a 'Credit card' checkbox. The 'Card Information' section includes 'Card Type', 'Last Four Digits' (*2376), and 'Expiration Month/Year' (06/2018). The 'Billing Address for Card' section includes 'Cardholder Name' (American Business Futures), 'Address' (2131 N. 14th Street, Suite 100), 'ZIP Code' (53205-1204), 'City' (Milwaukee), 'State' (WI), 'Country' (USA), 'E-mail Address' (artie@abf.com), and 'Comment'. The 'Corporate Card Information' section includes 'Corporate ID/PO'. The 'Transaction Information' section includes 'Transaction Type' (Deposit/Sale), 'Pay Balance' checkbox, and a table for 'Balance' and 'Deposit' with fields for 'Amount', 'Corp Sales Tax', 'Auth No.', 'Auth Amount', 'Auth Date', and 'Auth Time'. The 'Auth Time' is 12:00 AM. At the bottom, there are buttons for 'Quick Print', 'BMA', 'Copy From...', 'Quick Email', 'Text Message', 'Accept', 'Cancel', and 'Delete'.

Save - Select this check box to save the card ID for future use. Clear this check box if you do not want to save the card ID for future use.

This check box is automatically selected when entering a new card ID and clicking Yes to the message that appears asking if you want to save the card ID for future use.

The screenshot shows a 'Sage 100' dialog box with a question mark icon. The text reads: 'Do you want to save this new payment ID for future use?'. There are three buttons: 'Yes', 'No', and 'Cancel'. The 'No' button is highlighted with a blue border.

This check box is also selected if the card ID already exists for the customer, but it can be changed. If this check box is selected and changes are made to the billing or corporate card information, the record in Customer Credit Card Maintenance will be automatically updated when the entry is saved. This check box is cleared after the credit card information is successfully updated.

If this check box is cleared for an existing card ID and the card's expiration date is changed in the Sage Exchange window, clicking Submit in Sage Exchange will automatically update the record in Customer Credit Card Maintenance with the new expiration date.

Payment Type - Enter the credit card payment type, or click the Lookup button to list all credit card payment types. The payment type automatically defaults if an existing card ID is entered for the customer or if the customer is assigned a primary card ID in the Customer Maintenance.

Card Type -This field displays the card type returned from Sage Exchange and can only be viewed.

Primary-This check box is automatically selected if the entered credit card is the primary card ID assigned in Customer Maintenance; otherwise, it is cleared. This field can only be viewed.

Last Four Digits - This field displays the last four digits of the credit card number entered in Sage Exchange and can only be viewed.

For a one-time use card that is not processed through Sage Exchange, this field is available to manually enter the last four digits of the credit card number.

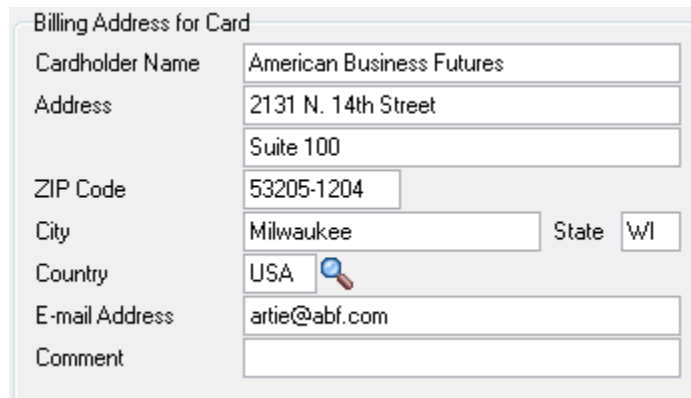
Expiration Month/Year -These fields display the expiration month and year of the credit card entered in Sage Exchange and can only be viewed.


If you are using a non-processing payment type and not saving the credit card record, these fields will be available to manually select an expiration month and year.

The screenshot shows a web form for credit card maintenance. At the top, there are fields for 'Card ID' (containing '*DIS*909') and 'Payment Type' (containing 'DISC'). To the right of the Card ID field is a magnifying glass icon and the text '**New**'. Below these fields are 'Save' and 'Clear' buttons. Below the main form area is a section titled 'Card Information' which contains fields for 'Card Type' (empty), 'Last Four Digits' (containing '*6909'), and 'Expiration Month/Year' (with dropdowns for '02' and '2017'). A 'Primary' checkbox is also present next to the Card Type field.

A message indicating that the card will expire in a specified number of days may appear based on the value entered in the **Days Before Credit Card Expiration** field in Accounts Receivable Options. You can click Submit Card to update the credit card's expiration month and year.

Cardholder Name - Type the cardholder name. When entering a new Card ID and a payment type or changing the payment type, this field will default to the customer name in Customer Maintenance, but it can be changed. This is a required field.



Billing Address for Card	
Cardholder Name	American Business Futures
Address	2131 N. 14th Street
	Suite 100
ZIP Code	53205-1204
City	Milwaukee
State	WI
Country	USA 
E-mail Address	artie@abf.com
Comment	

Address - Type the cardholder's billing address. When entering a new card ID and a payment type, these fields default to the first two address lines in Customer Maintenance, but they can be changed. The first line of the Address field will be used by the Sage Exchange address verification service. This is a required field.

ZIP Code -Type the cardholder's billing ZIP Code. When entering a new card ID and a payment type, this field defaults to the customer's billing ZIP Code in Customer Maintenance, but it can be changed. The information in this field will be used by the Sage Exchange address verification service. This is a required field.

City - Type the cardholder's billing city. When entering a new card ID and a payment type, this field defaults to the customer's billing city in Customer Maintenance, but it can be changed. If a ZIP Code is entered, the city automatically appears. This is a required field.

State - Type the cardholder's billing state. When entering a new card ID and a payment type, this field defaults to the customer's billing state in Customer Maintenance, but it can be changed. If a ZIP Code is entered, the state abbreviation automatically appears. This is a required field.

Country - Enter the code for the cardholder's billing country, or click the Lookup button to list all country codes. When entering a new card ID and a payment type, this field defaults to the customer's country code in Customer Maintenance, but it can be changed. The information in this field will be used by the Sage Exchange address verification service. This is a required field.

E-mail Address -Type the cardholder's e-mail address. This field defaults to the e-mail address in Customer Maintenance, but it can be changed. Use a semicolon (;) to separate multiple e-mail addresses. If the e-mail address is longer than this field, use the left and right arrow keys to view the entire address.

Billing Address for Card

Cardholder Name	American Business Futures111		
Address	2131 N. 14th Street		
	Suite 100		
ZIP Code	53205-1204		
City	Milwaukee	State	WI
Country	USA		
E-mail Address	artie@abf.com; ggg@yahoo.com		
Comment			

Comment- Type a comment for this credit card.

Corporate Card Information

Corporate Card Information

Corporate ID/PO	<input type="text"/>	Level <u>3</u>
-----------------	----------------------	----------------

Corporate ID/PO - Type the corporate ID or purchase order number assigned to the user of the corporate/commercial card. This field is available only if the **Allow Corporate Cards** check box is selected for the payment type in **Payment Type Maintenance**.

Click the Level 3 button to enter information for level 3 credit card processing. The button is available only if you enter something in the Corporate ID/PO field.

Note The corporate ID or purchase order number and the level 3 information is not required to process the transaction; however, the credit card company may charge a higher transaction fee if you do not track this information.

Transaction Information

Transaction Information

Transaction Type	Deposit/Sale		Fix
Pay Balance	Deposit/Sale		
	Balance	Deposit	
Amount	<input type="text" value=".00"/>	<input type="text" value=".00"/>	
Corp Sales Tax	<input type="text" value=".00"/>	<input type="text" value=".00"/>	
Auth No.	<input type="text"/>	<input type="text"/>	
Auth Amount	<input type="text" value=".00"/>		
Auth Date	<input type="text"/>	<input type="text"/>	
Auth Time	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>	
Transaction ID	<input type="text"/>	<input type="text"/>	

Transaction Type - Select a fund transfer method.

Select Deposit/Sale to process a credit card transaction on the deposit amount entered. A deposit transaction will be fully processed as a sale when the Submit Card or Accept button is clicked in this task and a deposit amount is entered. If the **Process in Batch** check box is selected, the transaction can be fully processed when the Perform Credit Card Processing check box is selected during the **Daily Sales Journal** printing.

Select **Payment/PrePost Authorization** to trigger the transfer of funds when printing the Daily Sales Journal. A payment will first be pre-authorized when the Submit Card or Accept button is clicked in the task. When Dispatch is closed into a Sales Order or S/O Invoice the pre-authorization is transferred to respective Order/Invoice.

Pay Balance – Select this check box to pay the balance of the Task using a credit card. If this check box is selected and you click Submit Card, the deposit that is entered will be processed and the remaining balance will be pre-authorized. Clear this check box to pay only the deposit using a credit card. This field is available only if Deposit/Sale is selected in the Transaction Type field.

The screenshot shows a web form titled "Corporate Card Information". It has two main sections: "Corporate ID/PO" and "Transaction Information".

Corporate ID/PO: PO#0111111, Level 3

Transaction Information:

- Transaction Type: Deposit/Sale (dropdown menu)
- Pay Balance: ☒
- Amount: 90.09 (Balance), .00 (Deposit)
- Corp Sales Tax: 6.09 (Balance), .00 (Deposit)
- Auth No.: 557557
- Auth Amount: 90.09
- Auth Date: 6/1/2016
- Auth Time: 09:17 AM
- Transaction ID: B61G9HXmK0

At the bottom, a message states: "The credit card transaction has been authorized."

(Balance/Payment) Amount - This field displays the credit card balance or credit card payment amount for the Task Total. This field can only be viewed.

(Balance/Payment) Corp Sales Tax - Type the sales tax amount associated with the credit card payment for the task. This field defaults to the Tax on the Task header but can be changed. The Tax amount is included in the total transaction amount. Sales tax amounts are reported for corporate cards only, and the amount entered here will be reported on the customer's corporate credit card statement.

If the **Sales Tax Reporting** check box is selected in **Accounts Receivable Options**, the default amount is calculated based on the actual sales tax amount and the amount of sales tax already allocated to the payment. If the Sales Tax Reporting check box is cleared, this

field defaults to 0.00. Click the Reset Corporate Sales Tax button to reset the amount to the default amount.

This field is available only if the Allow Corporate Cards check box is selected for the payment type in Payment Type Maintenance, and a corporate card ID or purchase order has been entered.

Note: The sales tax amount is not required to complete the transaction; however, the credit card company may charge a higher transaction fee if you do not track this information.

(Balance/Payment) Auth No.- This field displays the authorization number for the credit card transaction processed through Sage Exchange and can only be viewed.

For a one-time use card that is not processed through Sage Exchange, this field is available to manually enter the authorization number for the credit card transaction.

Note: The Process in Batch check box must be cleared to obtain an authorization number through Sage Exchange immediately after clicking Submit Card.

(Balance/Payment) Auth Amount - This field displays the authorization amount for the credit card transaction processed through Sage Exchange. The authorization amount defaults to the Task Total amount less the deposit amount, but it can be changed.

The pre-authorization amount is valid for 7 days. If the Task/Dispatch will be held beyond the 7-day period, select the Process in Batch check box to pre-authorize the amount through the Daily Sales Journal process.

This field is available only if Payment/PrePost Authorization is selected in the Transaction Type field.

(Balance/Payment) Auth Date - This field displays the authorization date for the credit card transaction processed through Sage Exchange and can only be viewed.

For a one-time card that is not processed through Sage Exchange, this field defaults to the current date when an authorization number has been entered.

(Balance/Payment) Auth Time - This field displays the authorization time for the credit card transaction processed through Sage Exchange and can only be viewed.

For a one-time card that is not processed through Sage Exchange, this field defaults to the current time when an authorization number has been entered.

(Balance/Payment) Transaction ID - This field displays the transaction ID for the credit card transaction when the transaction is successfully processed through Sage Exchange and can only be viewed. A message appears below this field stating that the credit card transaction was authorized. If the transaction is declined, this field is blank and a message appears below this field stating that the credit card transaction was not authorized.

This field is available when the Pay Balance check box is selected or Payment/PrePost Authorization is selected in the Transaction Type field.

Dispatch Data Entry

The **Dispatch Data Entry** program is used:

- To dispatch the tasks entered for a technician.
- For overall process control, by closing the dispatch and the task when completed.

To enter billing information, a sales order or an invoice must be created for services rendered.

Header Tab

Dispatch Data Entry (SMD) 2/17/2017

Task No. 0000984 3rd Party on-site mixed device

Dispatch No. 0001

1. Header | 2. Lines | 3. Payment User useriig

Dispatch Date 2/17/2017 Dispatch Status 0 Open

Starting Date 2/17/2017 Starting Time 10:53 AM Commit Quantity ☒

Ending Date 2/17/2017 Ending Time 11:31 AM

Technician ADAM Adams Arnold

Machine

Equipment No. 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

Contract No.

Deposit Payment Type CHECK CHECK

Check Number

Deposit Amount .00

Discount Rate .000%

Discount Amount .00

Freight Amount .00

Sales Tax Amount .00

Dispatch Total .00

Lines Total .00

Labor Total .00

Quick Print BMA Labor Accept Cancel Delete

Enter the Task Number to be dispatched. Press the Next Dispatch number button to create new Dispatch or select the one already created from the Lookup list. The Task Number and Technician Code, if specified, and the Dispatch Dates are automatically loaded. The Dispatch Date is defaulted to current date, the Starting Date/Time is defaulted from the Task Date and Time and the Ending Date/Time is defaulted to the current date and time. If

the type of the Contract assigned to the Task is Fixed Period, then the Dispatch Starting/Ending Dates are validated against the Contract Dates.

Based on the **Allow Maintain Contract/Task/Dispatch Text** security event the user can open and enter information in the **Task Text Maintenance** (Task Extended Description) while entering a dispatch

The screenshot displays the 'Dispatch Data Entry (SMD) 2/17/2017' window. The main window has tabs for '1. Header', '2. Lines', and '3. Payment'. The 'Header' tab is active, showing fields for 'Task No.' (0000984), 'Dispatch No.' (0001), 'Dispatch Date' (2/17/2017), 'Dispatch Status' (0), and 'User' (useriig). A 'Task Text Maintenance' dialog box is open over the main window. This dialog box has a title bar with a green 'S' icon and a red 'X' button. It contains a 'Task No.' field (0000984) and a description field (3rd Party on-site mixed device). The main text area of the dialog box contains the text '3rd Party on-site mixed devices. Training on new devices'. At the bottom of the dialog box, there is a 'Reported Issue' dropdown menu, a 'Time Stamp' button, and 'OK', 'Cancel', and 'Help' buttons. The main window also has a 'Quick Print' button and a 'BMA' button at the bottom left, and 'Labor', 'Accept', 'Cancel', and 'Delete' buttons at the bottom right.

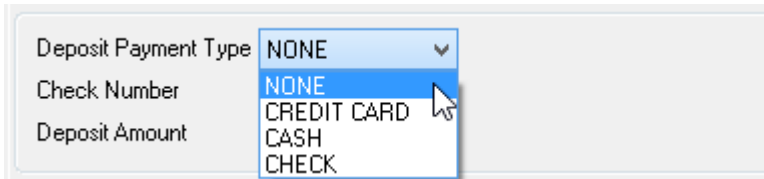
Technician - If the **Auto Load Technician** box is checked in the **Service Management Options**, the **Preferred Technician** will be automatically loaded in all the Dispatches.

Machine – allows for specifying a machine code for current dispatch. Upon selecting a Machine Code the **Technician** is changed to the one set as Default Technician for current Machine Code in the Machine Code maintenance.

Equipment No – is populated automatically when Dispatch is generated from Task Equipment Maintenance.

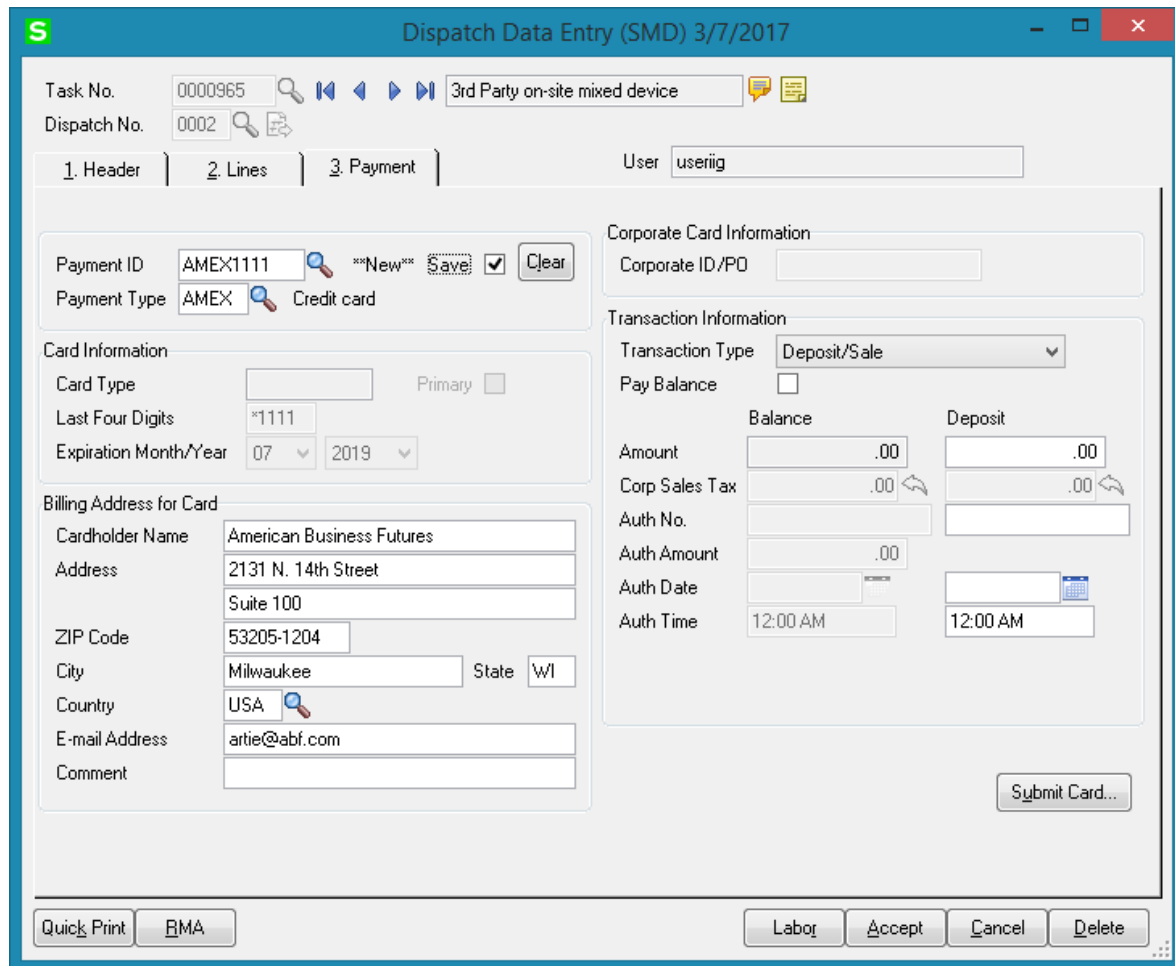
Contract No – allows for specifying a Contract for a Dispatch. The lookup button lists all Contracts of current Customer. The Flashlight button lists all contract items allowing the user to select the Contract by Item.

Deposit Payment Type is defaulted from the Customer and can be changed on the Dispatch if the **Deposit Payment Type** on the associated Task is not **Credit Card**. The **Deposit Payment Type** is defaulted to **None** if it is set to Credit Card on the Task.



A screenshot of a software interface showing a dropdown menu for 'Deposit Payment Type'. The menu is open, displaying four options: 'NONE' (highlighted), 'CREDIT CARD', 'CASH', and 'CHECK'. The 'Deposit Payment Type' label is to the left of the dropdown. Below it, 'Check Number' and 'Deposit Amount' labels are visible but their corresponding input fields are not shown.

Upon selecting Credit Card, focus moves to the Payment tab where the user can enter the credit card payment information and submit the transaction to Sage Exchange. If the default payment type is Credit Card and the customer is assigned a primary Card ID in the Customer Maintenance, this field defaults to Credit Card on the Task and cannot be changed on the Dispatch. The fields on the Credit Card tab of Dispatch Data Entry are same as the ones described for Task Data Entry.



A screenshot of the 'Dispatch Data Entry (SMD) 3/7/2017' window. The window has a blue title bar with a green 'S' logo. The main area is divided into several sections. At the top, there are fields for 'Task No.' (0000965) and 'Dispatch No.' (0002), with a '3rd Party on-site mixed device' label. Below these are tabs for '1. Header', '2. Lines', and '3. Payment', with '3. Payment' selected. A 'User' field shows 'userig'. The 'Payment' section includes a 'Payment ID' field (AMEX1111), a 'Payment Type' dropdown (AMEX), and a 'Credit card' checkbox. The 'Card Information' section has fields for 'Card Type', 'Last Four Digits' (*1111), and 'Expiration Month/Year' (07/2019). The 'Billing Address for Card' section contains fields for 'Cardholder Name' (American Business Futures), 'Address' (2131 N. 14th Street, Suite 100), 'ZIP Code' (53205-1204), 'City' (Milwaukee), 'State' (WI), 'Country' (USA), 'E-mail Address' (artie@abf.com), and a 'Comment' field. The 'Transaction Information' section has a 'Transaction Type' dropdown (Deposit/Sale), a 'Pay Balance' checkbox, and a table for 'Amount', 'Corp Sales Tax', 'Auth No.', 'Auth Amount', 'Auth Date', and 'Auth Time'. The 'Submit Card...' button is at the bottom right. At the very bottom, there are buttons for 'Quick Print', 'RMA', 'Labor', 'Accept', 'Cancel', and 'Delete'.

For **CASH Deposit Payment Type** the Reference number field is enabled for entry of Reference Number. After Reference Number is entered the Deposit Amount field becomes enabled. Upon entering Deposit Amount the **Net Dispatch** field appears populated with Amount calculated as: “**Dispatch Total – Deposit Amount**”.

Deposit Payment Type	CASH	Cash
Reference Number	REF#010001201	
Deposit Amount	50.00	

Discount Rate	.000%
Discount Amount	.00
Freight Amount	.00
Sales Tax Amount	3.99
Dispatch Total	168.99
Lines Total	55.00
Labor Total	110.00
Net Dispatch	118.99

For **CHECK Payment Type** the Check Number field is enabled for entry of Check Number.

Deposit Payment Type	CHECK	CHECK
Check Number	0011221111	
Deposit Amount	100.00	

Discount Rate	.000%
Discount Amount	.00
Freight Amount	.00
Sales Tax Amount	3.99
Dispatch Total	168.99
Lines Total	55.00
Labor Total	110.00
Net Dispatch	68.99

If the **Don't prompt if Technician is busy during the scheduled time** box is not checked in the **Service Management Options**, the program will check if the Technician is busy on other active dispatches with intersecting periods each time this Dispatch is accepted. The Technician Busy dialogue will popup:

Technician already busy on the following Dispatches

Technician Code Adams Arnold

Task No.	Dispatch No.	Start Date	Start Time	End Date	End Time
0000983	0002	2/17/2017	10:00	2/17/2017	12:00

Dispatch period will have intersections with these dispatches for this Technician

The Dispatches with their Starting and Ending Date/Time are listed here.
Click **Continue** to accept the Dispatch despite the intersecting dispatches.
Click **Cancel** to return to the Dispatch Entry screen without saving.

If the **Prompt if equipment is busy during the scheduled time** option is turned on in the SM Options, the program will check if the selected Equipment is busy on other active dispatches with intersecting periods and open the Equipment Busy dialogue with respective information:

Equipment already busy on the following Dispatches

Equipment No.

Task No.	Dispatch No.	Start Date	Start Time	End Date	End Time
0000945	0001	1/22/2015	10:08	1/22/2015	10:10

Dispatch period will have intersections with these dispatches for this Equipment

Reservation Process in Dispatch Data Entry

The **Commit Quantity** check box added to the **Dispatch Data Entry Header** tab allows for committing Item when it is entered in the Dispatch line.

Starting Date	2/17/2017	Starting Time	10:00 AM	Commit Quantity <input checked="" type="checkbox"/>
Ending Date	2/17/2017	Ending Time	12:00 PM	

If this checkbox is selected the **On SO** and **Committed** fields values on the **Quantity** tab of the Item Maintenance will be updated correspondingly when the Item is added to the dispatch.

The **Dispatch Total** field displays the sum of Labor and Lines Total included the Tax amount. It is necessary to press the **Recalculate Dispatch Total** button to have the Dispatch Total calculated properly.

Lines Total is populated with the Lines Total Amount and the Labor Total field is populated with the Total Amount of Labor Charge lines.

Discount Rate	.000%
Discount Amount	.00
Freight Amount	7.60
Sales Tax Amount	23.85
Dispatch Total	508.40
Lines Total	421.95
Labor Total	55.00
Net Dispatch	338.31

Discount Rate - Type a discount rate for this customer. If a new rate is entered, the discount amount is recalculated.

Discount Rate	10.000%
Discount Amount	47.70
Freight Amount	7.60
Sales Tax Amount	21.46
Dispatch Total	458.31
Lines Total	421.95
Labor Total	55.00
Net Dispatch	338.31

Discount Amount - This field defaults the rate entered in the Discount Rate field in the Customer Maintenance, but it can be changed. The discount amount is calculated by multiplying the amount subject to discount by the discount rate. If a new discount amount is entered, the discount rate is recalculated. The Discount Amount is applied only to the Items selected as Discountable on the Lines tab and the Labor lines if the .

Freight Amount - If the Use Shipping Code to Calculate Freight check box is selected in Sales Order Options and a shipping code is entered in the Ship Via field, the freight amount is automatically calculated based on the entries in the Ship Zone and Ship Weight fields. The Freight Amount is recalculated when Dispatch is closed in a Sales Order or Invoice.

Sales Tax Amount - This field displays the total sales tax for the dispatch and can only be viewed.

Net Dispatch field displays the Dispatch Total less any deposit amount. This field can only be viewed.

Lines Tab

Enter the **Item/Kit Numbers** of the parts and materials that will be used by the technician to perform the dispatched task. The price of the items will be determined by the customer's special pricing or by the terms of a contract (if any) covering this task

Dispatch Data Entry (SMD) 3/7/2017

Task No. 0000965 3rd Party on-site mixed device

Dispatch No. 0002

1. Header | 2. Lines | 3. Payment User: useriig

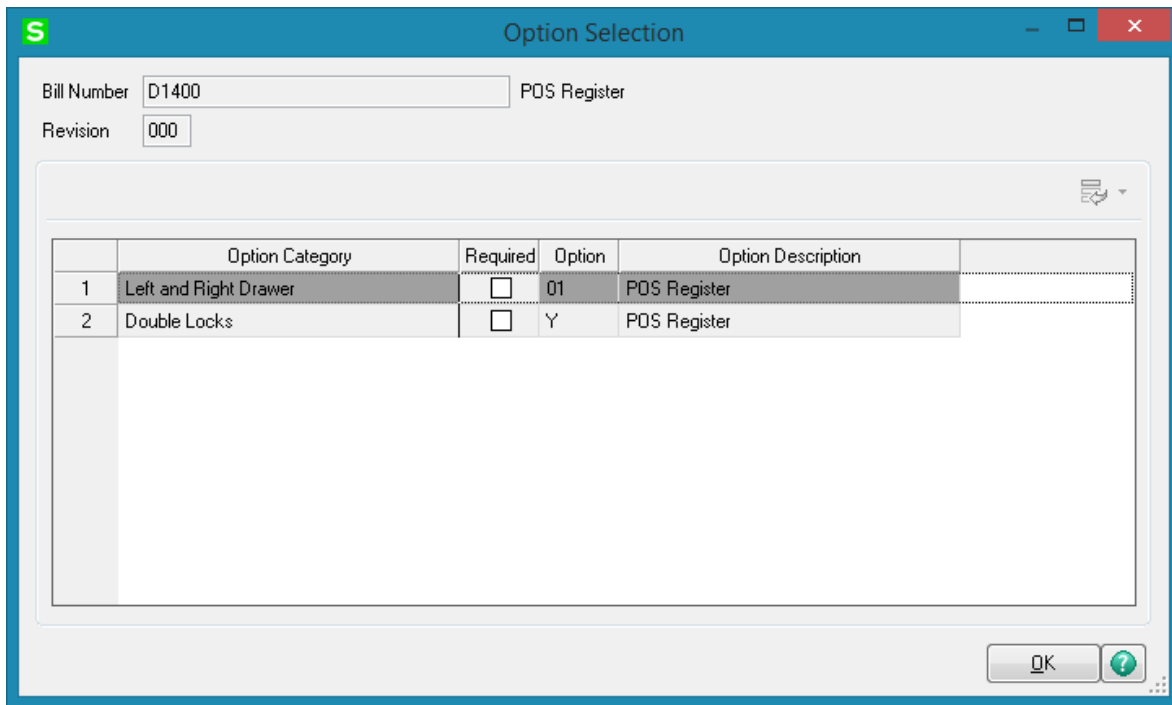
	Item Code	Ordered	Unit Price	Extension	Comment
1	1001-HON-H252	2.00	84.000	168.00	
2	D1400	2.00	1,700.000	3,400.00	
3	D1000-BBw/LIGHT	4.00	.000	.00	
4	D1000-LHDS	2.00	.000	.00	
5	D1000-LOCK	4.00	.000	.00	
6	D1000-RHDS	2.00	.000	.00	
7	D2000	2.00	.000	.00	
8	D2000-C	4.00	.000	.00	
9	D2000-CD	2.00	.000	.00	

Description: Door Installation
Warehouse: 000
Unit Of Measure: EACH
Price Level: 1

Total Amount: 3,568.00

Quick Print RMA Labor Accept Cancel Delete

When entering a Kit Item, it is exploded based on the **Explode Kit Items** option set on the Additional tab of Item Maintenance. If Kit Item has options assigned the Options selection screen is opened allowing the user to select Bill Options. Bill Options button allows for viewing the options selected while exploding Kit.



The image shows a software window titled "Option Selection" with a blue header bar. Inside the window, there are two input fields: "Bill Number" with the value "D1400" and "Revision" with the value "000". To the right of these fields is the text "POS Register". Below the input fields is a table with the following data:

	Option Category	Required	Option	Option Description
1	Left and Right Drawer	<input type="checkbox"/>	01	POS Register
2	Double Locks	<input type="checkbox"/>	Y	POS Register

At the bottom right of the window are two buttons: "OK" and a help button with a question mark icon.

If there is Default Warehouse Code assigned to the Technician of current Dispatch it is automatically loaded when entering new line in the Dispatch.

Labor Charge Data Entry

Use the **Labor** button at the bottom of the **Dispatch Data Entry** screen to access the **Labor Charge Data Entry** screen.

If the **Allow Quote Hours in Task Entry** flag is set in the **Service Management Options**, the **Quote Hours** and **Quote Amount** fields will become visible, displaying the unused hours left from the quote hours of the task and amount remaining from the task quote. If the contract type is Fixed Hours, the **Unused Contract Hours** displays the unused hours left from the fixed hours of the contract.

S Labor Charge Data Entry (SMD) 3/7/2017

Task No. 0000965 Dispatch No. 0002 Dispatch Date 2/6/2017 Starting 2/6/2017 04:36 PM
Ending 2/11/2017 06:36 PM

Quote Amount 1,068.75 Quote Hours 117.75

Start Quick Row 1

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	INSTALL	ADAM	122.00	55.000	1,068.75
2			.00	.000	.00

Description	Installation Services
Tax Class	TX
Disc %	84.072
Over. Start Date	2/6/2017
Over. Start Time	04:36 PM
Overtime Factor	1.50

Total Amount 1,068.75

Accept Cancel Delete

The **Technician Code** is defaulted from Dispatch header if the **Technician from Task to Dispatches and Labors** option is turned on in the Auto Load section of the S/M Options Main tab. If it is not turn on the Technician Code field is blank and it is necessary to enter the Technician Code.

Use the **Labor/Skill Code** field to enter appropriate codes. Use the **Lookup** button to view the list of available labor codes defined in the **Labor Code Maintenance** program. If the user enters “/” in the **Labor Skill Code** field, and then presses the **Lookup** button, it will open a list of available Skill Codes defined in the **Skill Code Maintenance** program.

Labor Charge Data Entry (SMD) 5/18/2017

Task No. 0000965 Dispatch No. 0002 Dispatch Date 2/6/2017 Starting 2/6/2017 04:36 PM
 Ending 2/11/2017 06:36 PM

Unused ☐ Contract Hours 107:30 Quote Amount 1,184.05 Quote Hours 115.25

Start Quick Row 2

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	INSTALL	ADAM	1.50	55.000	13.14
2	/		.00	.000	.00

Skill Code List

Skill Code	Description	Job Code
ADM	Administrative	400-000-000
PRF	Professional	500-000-000
SPC	Special	510-000-000
STD	Standard	410-000-000

Search Skill Code Begins with Find

Filters...

Custom... Lookup Wizard... Select Cancel

Found 4 records

The **Over. Start Date/Time** fields are visible on the **Labor Charge Data Entry** screen, if the **Use Overtime calculation for Labor** box is checked in the **Service Management Options**.

The **Retainer Factor** and **Overtime Factor** fields are available for the tasks of Fixed Hours contracts, if the **Use Overtime calculation for Labor** box is checked in the **Service Management Options**.

If the period of the line is not completely covered by the coverage area corresponding to the **Coverage Code** of the **Task**, the program will prompt to split the lines:

S Labor Charge Data Entry (SMD) 3/7/2017

Task No. 0000965 Dispatch No. 0002 Dispatch Date 2/6/2017 Starting 2/6/2017 04:36 PM
Ending 2/11/2017 06:36 PM

Quote Amount 981.15 Quote Hours 107.75

Start Quick Row 1

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	INSTALL	ADAM	10.00	55.000	87.60
2				.000	.00

Over. Start Date 2/6/2017
Over. Start Time 02:36 PM
Overtime Factor 1.50
Overtime ☐
Imported to JC ☐

Total Amount 87.60

Accept Cancel Delete

S Sage 100

Dispatch Line period is out of coverage area.
Split to Regular and Overtime Lines?

Yes No

In our example the Coverage Code of the Task is **HSRV** (is shown below) and the work hours for 2/6/2017(Monday) is from 9:00 Am till 4:00PM. So when we enter 10 in the Hours Spent field a prompt appears about splitting the labor line to regular and overtime lines.

S Coverage Code Maintenance ...

Coverage Code HSRV Description Work hours for services

Workdays Only ☒

Monday	9:00AM	4:00PM
Tuesday	9:00AM	8:00PM
Wednesday	9:00AM	8:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	6:00PM
Saturday	12:00AM	12:00AM
Sunday	12:00AM	12:00AM

Accept Cancel Delete Print Help

After splitting, a new line is added with the **Overtime** checkbox selected. The Billing Rate for overtime line is calculated as the regular line **Billing Rate * Overtime Factor**.

Labor Charge Data Entry (SMD) 3/7/2017

Task No. 0000965 Dispatch No. 0002 Dispatch Date 2/6/2017 Starting 2/6/2017 04:36 PM
Ending 2/11/2017 06:36 PM

Quote Amount 943.92 Quote Hours 107.75

Start Quick Row 2

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	INSTALL	ADAM	1.50	55.000	13.14
2	INSTALL	ADAM	8.50	82.500	111.69
3			.00	.000	.00

Over. Start Date 2/6/2017
Over. Start Time 04:06 PM
Overtime Factor 1.50
Overtime ☒
Imported to JC ☐

Total Amount 124.83

Accept Cancel Delete

For the **Fixed Hours** contracts, the hours will be multiplied by the **Retainer Factor** before subtracting from the **Contract Hours**.

The **Hours Spent** field indicates the amount of time spent by the technician to perform the job.

If the contract type is Fixed Hours, and the Quote Amount is over, the **Discount %** will always be 100% (the hours cannot be billed).

The **Tax Class** field becomes visible if the **Calculate Taxes on Labor** option is set to **Dispatch Line** in the **Service Management Options**, and the **Ship-to Address** of the Task has the **Calculate taxes on Labor** box checked. The **Tax Class** will be defaulted to the one of the selected **Labor/Skill Code**.

The **Billing Rate** is determined by the terms of a contract (if any) covering this task. If there is no contract, the rate will be based on the **Billing Rate Calculation Priority** in the

Service Management Options program, where the priority of the technician, skill, and labor rates is indicated.

If the **Rate** is changed and that rate has been saved, it will be used for the selected Technician, Labor/Skill, Customer and Contract, next time when entering line for that combination.

Click the **Start** button to register start of working at the selected Line. The Start button will be changed to **Finish**.

After finishing working at the Line, open the Dispatch and select the Line, then click the **Finish** button. The program will calculate the time between the start and finish of the work and add that time to the **Hours Spent** value.

When the work is started (the button is **Finish**), hold the mouse over the button, to view the Start Date/Time in the tool-tip.

Waiting for Receipt

Select “**W**” in the **Dispatch Status** field, if you wish to automatically generate purchase orders for the items and labor on the dispatch.

Line information entered in the **Labor Charges Entry** screen (Technician Code, Labor/Skill Code) will be transformed into an item code, if the **Labor Billing Presentation** is set to **Inventory Item** on the **Line Entry** tab of the **Service Management Options** program.

The screenshot shows the 'Dispatch Data Entry (SMD) 3/7/2017' window. At the top, there are fields for 'Task No.' (0000965) and 'Dispatch No.' (0003), along with a description '3rd Party on-site mixed device'. Below these are tabs for '1. Header', '2. Lines', and '3. Payment', and a 'User' field with 'useriig'. A 'Dispatch Date' field shows '3/7/2017' and a 'Dispatch Status' field shows 'W'. An 'Open' button is next to the status field. A 'Selection' dialog box is open in the foreground, displaying a table of items. The table has columns: Vendor No., Item Code, Warehouse, Unit Cost, Quantity Ordered, Include, and Description. Two items are listed: '01-CONT 1001-HON-H254' and '01-CONT 1001-HON-H252LK'. The 'Include' column has checkboxes, both of which are checked. The 'Quantity Ordered' column shows '2.00' and '3.00' respectively. The 'Next Automatic Purchase Order Number' field shows '01ABF14'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

	Vendor No.	Item Code	Warehouse	Unit Cost	Quantity Ordered	Include	Description
1	01-CONT	1001-HON-H254	000	83.500	2.00	<input checked="" type="checkbox"/>	HON 4 DRAWER LETT
2	01-CONT	1001-HON-H252LK	000	37.150	3.00	<input checked="" type="checkbox"/>	HON 2 DRAWER LETT

You may select the items to appear on the automatically generated purchase orders. The vendor is defaulted to the item's **Primary Vendor** found in the **Inventory Maintenance** screen, but may be changed.

The **Quantities Ordered** may be changed manually.

Press **Ok** button to generate POs for the included lines.

When items are received in **Receipts of Goods Entry** and updated through the **Receipts Register**, the dispatch status is changed to "**Updated Receipt**".

S Dispatch Data Entry (SMD) 3/7/2017

Task No. 0000965 3rd Party on-site mixed device

Dispatch No. 0003

1. Header | 2. Lines | 3. Payment | User useriig

Dispatch Date 3/7/2017 **Dispatch Status** Updated Rcpt.

Starting Date 2/6/2017 Starting Time 04:36 PM Commit Quantity ☒

Ending Date 3/7/2017 Ending Time 05:51 PM

Technician ADAM Adams Arnold

Machine

Equipment No. 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

Contract No.

Deposit Payment Type CHECK CHECK

Check Number

Deposit Amount .00

Discount Rate	10.000%
Discount Amount	52.58
Freight Amount	51.30
Sales Tax Amount	34.31
Dispatch Total	558.84
Lines Total	523.00
Labor Total	2.81

Quick Print BMA Labor Accept Cancel Delete

Dispatch Closing

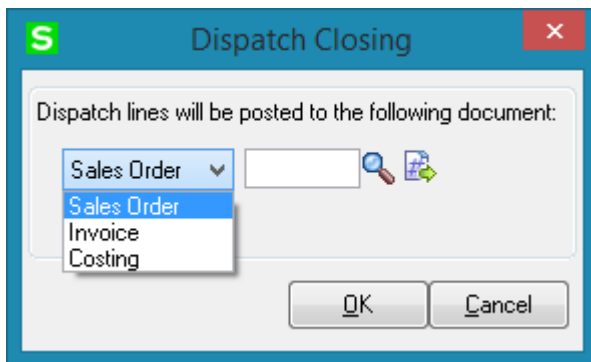
For closing the dispatch select "C" in the **Status** field on the **Dispatch Data Entry** form.

Closing the dispatch will post all the line information to the specified document, i.e., sales order, invoice, costing (I/M Issue Transaction). If there is Customer PO Number specified on the Task, it will be posted to the Sales Order and Invoice too.

S Sage 100

Do you want to generate Sales Order, Invoice or Costing?

Yes No



You may change the **Type** of document to which this posting is made, by selecting from the Drop down box.

If the task has been generated from a sales order, the number of that sales order will be displayed by default, when the document is set to Sales Order.

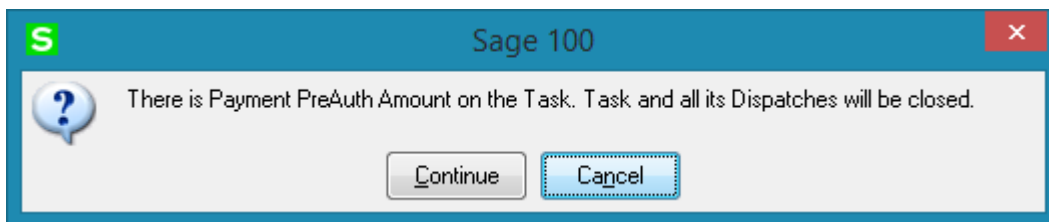
You can choose to post the dispatch to any existing sales order or invoice. Alternatively, you can assign the next available number by using the **Next Number** icon, and in this case, a new document will be created with all the dispatch numbers listed there.

Upon closing the dispatch, line information entered in the **Labor Charges Entry** screen (Technician Code, Labor/Skill Code) will be transformed into an item (Inventory, Special or Miscellaneous) according to the settings in the **Service Management Options** screen.

If the dispatch has neither Material nor Labor lines, the following message will be displayed, and the dispatch can be closed without generating any document.

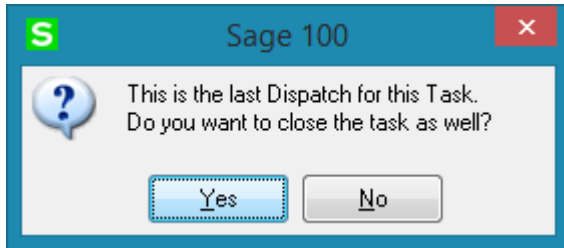


The following message will appear upon closing a Dispatch if there is Credit Card Transaction on the associated Task:



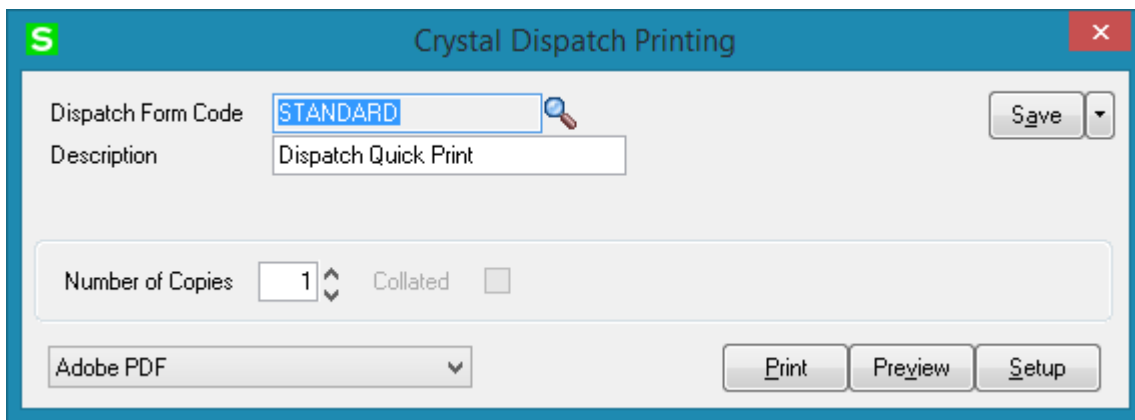
Selecting Continue will close all Dispatches and the associated Task.

If there is no Credit Card specified on the Task the user is prompted about closing the Task when the last Dispatch for current Task is being closed:



Dispatch Quick Printing

Press the **Quick Print** button to print the Dispatch:



The Dispatch Printing program calculates and prints also the Taxable and Non Taxable Amounts:

Dispatch Printing

324 Blackwell St
Durham, WI 27708

324 Blackwell St
Durham, NC 27708

Task Description: 3rd Party on-site mixed devices
 [useriig3/7/2017 05:50:24 PM] Dispatch 0001 Status Changed from="W" to "O"
 [useriig3/7/2017 05:53:45 PM] Dispatch 0003 Status Changed from="W" to "O"
 [useriig3/7/2017 05:54:48 PM] Dispatch 0003 Status Changed from="W" to "O"
 [useriig3/7/2017 06:02:00 PM] Dispatch 0003 Status Changed from="W" to "U"
 [useriig3/7/2017 06:12:29 PM] Dispatch 0003 Status Changed from="U" to "C"
 [useriig3/7/2017 06:19:38 PM] Dispatch 0002 Status Changed from="O" to "C"
 [useriig3/7/2017 06:19:49 PM] Dispatch 0001 Status Changed from="O" to "C"

Confirm to: J.Quin
 Install on all workstations? No, only on the server
 Order taken by: A.Arnolds

Dispatch No.	Dispatch Date	Dispatch Tech.	Dispatch Contract Number	Dispatch Equipment No.
0003	3/7/2017	Adams Arnold		1001-HON-H252
1001-HON-H254		HON 4 DRAWER LETTER FLE W/O LK	2.00	131.000 0.000 262.00
1001-HON-H252LK		HON 2 DRAWER LETTER FLE W/LK	3.00	87.000 0.000 261.00
INSTALL	Installation Services	Adams Arnold	2.00	55.000 97.447 2.81
BUILD	Building Services	Adams Arnold	1.25	55.000 100.000 0.00
Total :				525.81
Taxable Amount :				525.81
Nontaxable Amount :				0.00
Less Discount :				52.58
Freight :				51.30
Sales Tax :				34.31
Dispatch Total :				558.84

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

The **Dispatch Total** displays the total for all lines of Dispatch, applicable freight and tax amounts, minus any applicable discount.

If there is **Deposit Amount** on the Dispatch header the **Deposit Amount** and **Net Dispatch** fields are also printed on the report.

Transfer Dispatch Items

The **Transfer** button becomes visible on the Header tab of the **Dispatch Data Entry** if the Dispatch is created for a Task with **Task Type** matching the one set in the Service Management Options for **Transfer Task Type**. ("T" in our example).

S Dispatch Data Entry (SMD) 4/6/2017

Task No. 0000993
Dispatch No. 0001

1. Header | 2. Lines | 3. Payment | User useriig

Dispatch Date 4/5/2017 [Dispatch Status](#) 0 Open

Starting Date 4/5/2017 Starting Time 05:05 PM Commit Quantity ☒
Ending Date 4/5/2017 Ending Time 05:05 PM

[Technician](#) ADAM Adams Arnold
[Machine](#)
[Equipment No.](#) 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK
[Contract No.](#)

Deposit Payment Type NONE
Check Number
Deposit Amount .00

Transfer...

Discount Rate	.000%
Discount Amount	.00
Freight Amount	66.40
Sales Tax Amount	54.52
Dispatch Total	872.92
Lines Total	752.00
Labor Total	.00

Quick Print RMA Labor Accept Cancel Delete

Upon pressing **Transfer** button the Transfer Dispatch items grid is opened loaded with the Dispatch inventory Items lines, which Warehouse code doesn't match the Warehouse code assigned to the Dispatch Technician.

	Item Code	Warehouse	Tech. Warehouse	Quantity	Include
1	1001-HON-H252	001	000	2.00	<input checked="" type="checkbox"/>
2	1001-HON-H254LK	001	000	3.00	<input checked="" type="checkbox"/>

Transaction(s) generation completed successfully.

OK

It is necessary to select the Include checkbox and press Ok to have the selected Items transferred to the Technician's warehouse. Here is the **I/M Transfer Transaction** generated for S/M Dispatch line transfer:

The Comment field on the Transfer header indicates that Transfer is generated for S/M dispatch line transfer.

S Transaction Entry (SMD) 4/6/2017

Transaction Type: Transfers

Entry Number: 00000001

1. Header | 2. Lines

Transaction Date: 4/6/2017

Transfer From Warehouse: 001 EAST WAREHOUSE

Transfer To Warehouse: 000 CENTRAL WAREHOUSE

Comment: SM Dispatch Line Transfer

Accept Cancel Delete

S Transaction Entry (SMD) 4/6/2017

Transaction Type: Transfers

Entry Number: 00000001

1. Header | 2. Lines

Quick Row: 1

	Item Code	Quantity	Unit Cost	Extension
1	1001-HON-H252	2.00	29.575	59.15
2	1001-HON-H254LK	3.00	87.250	261.75
3		.00	.000	0.00

To Warehouse: 000

From Warehouse: 001

Description: HON 2 DRAWER LETTER FLE W/O LK

Costing: FIFO

Accept Cancel Delete

Auto Generate Task Selection

The **Auto Generate Task Selection** program can be used to automatically generate preventive maintenance tasks based on the requested criteria.

Upon pressing Proceed button the program will look for all the preventive maintenance contracts meeting the selection criteria, utilize the **Days in One PM Period** and **Last Task Generation Date** fields on the contract, and determine whether it is time for another PM to take place.

Select Field	Operand	Value		
PM Code	All			
Contract No.	All			
Customer Number	All			
Item Code	All			
Nature Of Task	All			
Route	All			
Technician Code	All			

The **Generate Tasks for all Contract Items** check box allows for generating tasks for all Contract Items.

If this check box is cleared, tasks will be generated only for the **Contract Default Item**.

If the box is checked, the program will try to generate tasks for all the items of the contract. The tasks will be generated for the lines that have the PM Code specified and it is the time of generating tasks based on the date of generation.

The **Generate Dispatches for all Contract Items** option allows for automatically creating Dispatches by the Technician specified on the Contract header. The Components added for a Contract Item in the Contract Item Maintenance will be automatically loaded into the generated Dispatch lines. It is necessary to have a Technician Code specified on the Contract in order to have the Contract included in the generation.

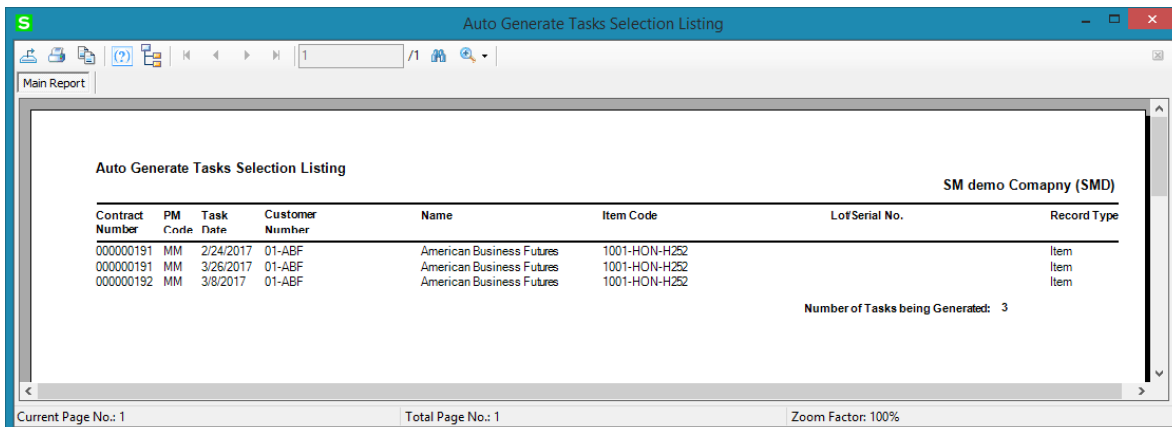
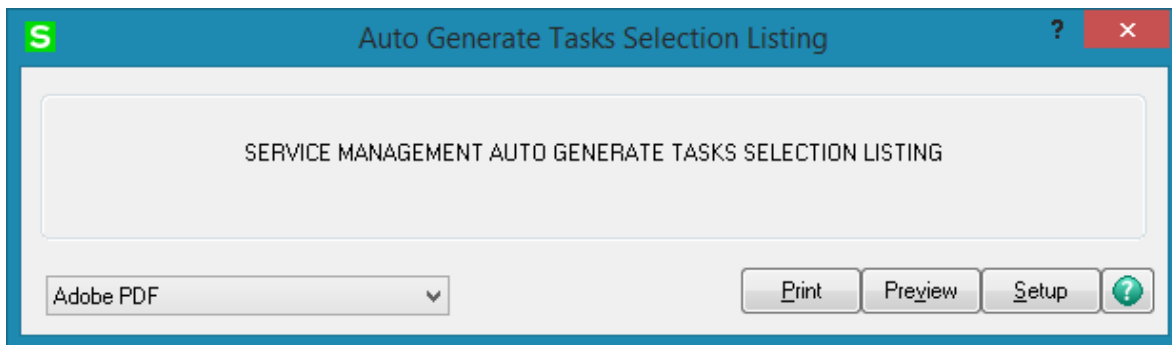
You can select to generate tasks for the contracts in the specified ranges of **PM Code**, **Contract Number**, **Customer Number**, **Item Code**, **Nature of Task**, **Route** and **Technician Code**.

Make necessary selections and press Proceed to have the records loaded in the worktable.

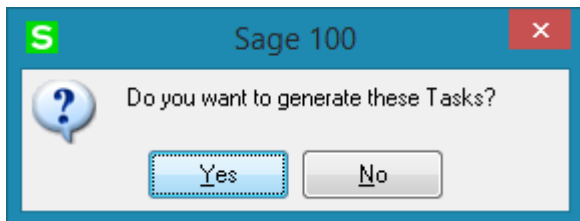
Select Field	Operand	Value		
PM Code	All			
Contract No.	Range	000000191	000000194	
Customer Number	All			
Item Code	All			
Nature Of Task	All			
Route	All			
Technician Code	All			

Select Field	Operand	Value		
PM Code	All			
Contract No.	All			
Customer Number	All			
Item Code	All			
Nature Of Task	All			
Route	All			
Technician Code	All			

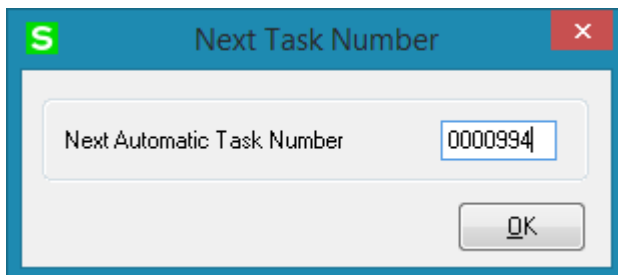
Press the Print button to run the **Auto Generate Tasks Selection Listing** program to preview/print the list of Contracts and Contract Items for which Tasks will be generated.



After the listing is printed or the preview screen is closed the user is asked for confirmation to generate tasks.



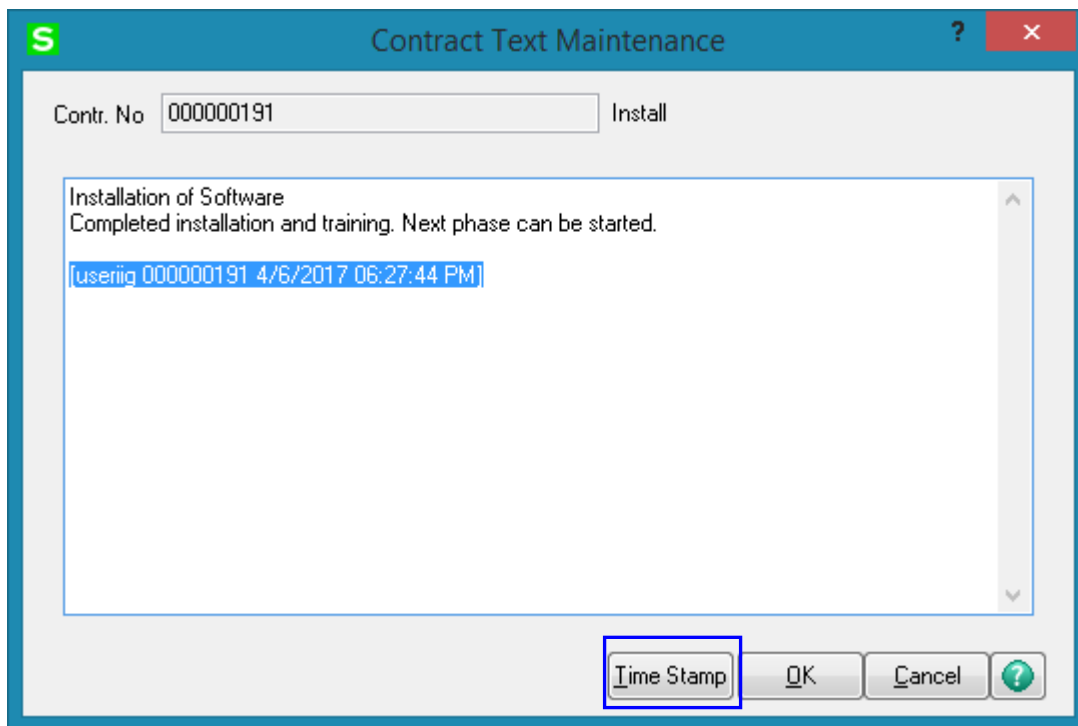
Selecting Yes will open a dialogue with the Next Task Number loaded from S/M Options. The user is allowed to change the Next Automatic Task Number during generation. If the Next Automatic Task Number is changed during Task generation it will update the Next Automatic Task Number in the S/M Options.



Tracking Changes on Contract and Task Notes

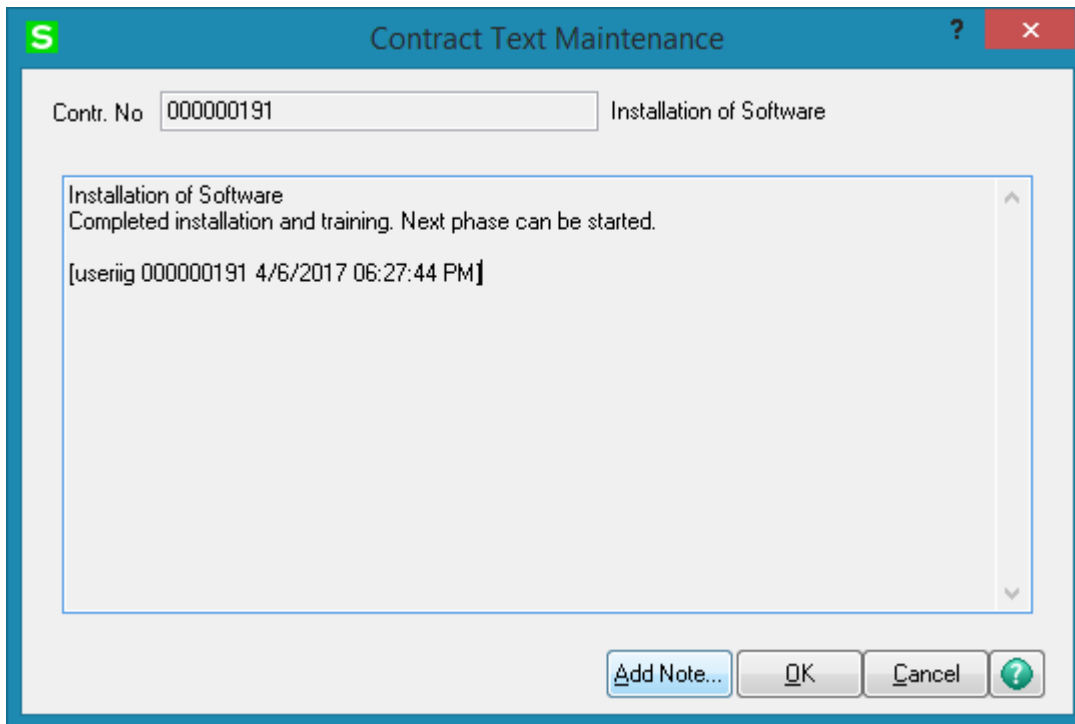
Contract Data Entry

The **Contract Data Entry** program has been modified to provide with ability of tracking changes to Contract note (Contract Extended Description). Each change made in the **Contract Text Maintenance** can be stamped by the **Time Stamp** button.

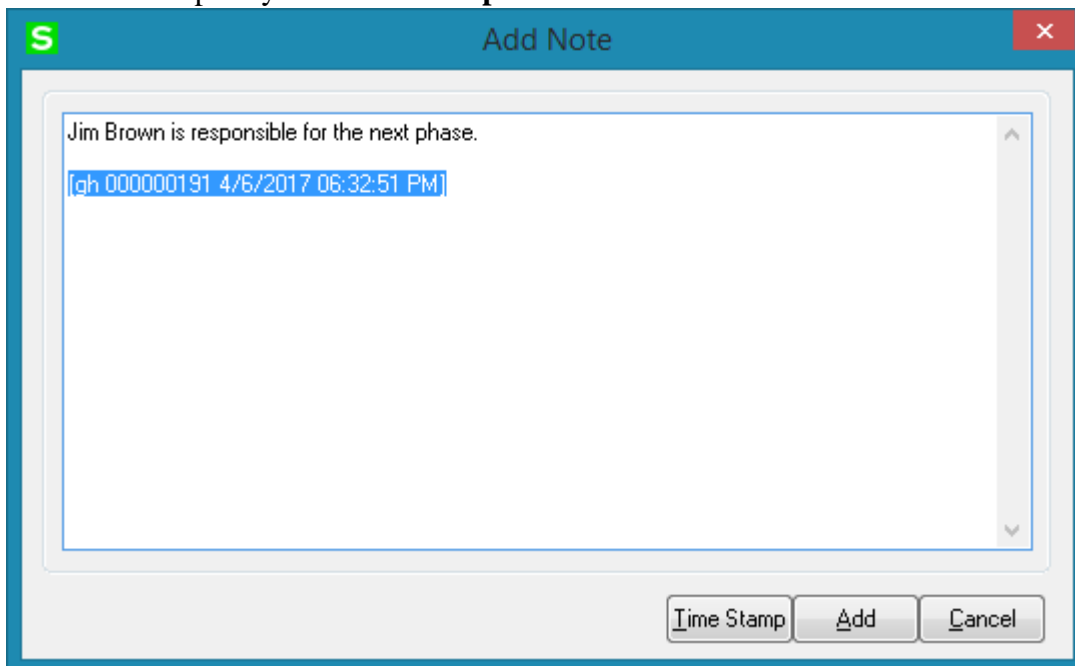


Press the **Time Stamp** button to insert the User Logon of the user who edited the Note, the Date and Time when a note is entered /edited. MAS system User Logon and the Module Date are applied.

If the user is not authorized to edit the notes, that is, the **Allow Maintain Contract/Task/Dispatch Text** security event is not enabled for that user's Role, the **Add Note** button is shown on the screen to allow adding new notes without ability of making any changes on the ones already entered:



Upon pressing the **Add Note** button a dialogue is opened allowing the user to enter the notes and stamp it by the **Time Stamp** button.



After entering the notes it's necessary to press Add button to append the newly added note to the existing one:

Contract Text Maintenance

Contr. No: 000000191 Installation of Software

Installation of Software
Completed installation and training. Next phase can be started.
[useriig 000000191 4/6/2017 06:27:44 PM]
Jim Brown is responsible for the next phase.
[gh 000000191 4/6/2017 06:32:51 PM]

Add Note... OK Cancel ?

Task Data Entry

The **Task Data Entry** program has been modified to provide an ability to track changes to Task note (Task Extended Description). Each change made in the Task Text Maintenance can be stamped by the **Time Stamp** button.

The screenshot shows the 'Task Text Maintenance' window. At the top, there is a title bar with a green 'S' icon, a question mark, and a close button. Below the title bar, the window contains a 'Task No' field with the value '0000969' and an 'Implementation' label. A large text area displays the following text: 'Implementation', '05/18/2017-scheduled kick-off meeting', and '[useriig 5/19/2017 11:58:48 AM]'. At the bottom, there is a 'Reported Issue' dropdown menu with 'Appointment For Sales Call' selected, a 'Time Stamp' field, and buttons for 'OK', 'Cancel', and a help icon.

The **Reported Issue** drop down lists the descriptions of issues setup in the Reported Issue Maintenance, which can be used when adding notes.

Based on the **Allow Maintain Contract/Task/Dispatch Text** security event the user may edit the existing note or only add new note as described above for the Contract note.

The screenshot shows the 'Task Text Maintenance' window with the same 'Task No' and 'Implementation' label. The large text area now displays: 'Implementation', '05/18/2017-scheduled kick-off meeting', '[useriig 5/19/2017 11:58:48 AM]', and 'Belt / Drive Chain Check [useriig 5/19/2017 12:00:07 PM]'. The 'Reported Issue' dropdown menu is empty. The buttons at the bottom are 'Add Note...', 'OK', 'Cancel', and a help icon.

Auto Generate Invoice Selection

The **Auto Generate Invoice Selection** program can be used to easily create Invoices with automatic generation.

You can choose to process all the customers and tasks or only the selected ones. Also you can select dispatches by date and status and by Bill Frequency Code of the Task.

Auto Generate Invoice Selection (SMD) 5/19/2017

Bill Freq Code Include Tasks Without Contract ☐ Batch 00040

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input type="checkbox"/>
Fixed Percent Complete	<input checked="" type="checkbox"/>
Fixed On Going	<input checked="" type="checkbox"/>

Select Field	Operand	Value
Customer Number	All	
Contract No.	All	
Task No	All	
Dispatch Date	All	
Dispatch Status	All	
Route	All	


Contract Number	Task Number	Dispatch No	Customer Number	Include	Dispatch
-----------------	-------------	-------------	-----------------	---------	----------

Clear ☒ Include Grouped By Contract Proceed Cancel Generation

Check the **Include Tasks without Contract** box to select the tasks not having contract assigned in addition to other selections.

After making selections, click the **Proceed** button to have all dispatches matching the selection criteria loaded in the list box. The Proceed button adds newly selected dispatches to the list of already selected ones.

S Auto Generate Invoice Selection (SMD) 5/19/2017

Bill Freq Code Include Tasks Without Contract ☒ Batch 00040 

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input type="checkbox"/>
Fixed Percent Complete	<input checked="" type="checkbox"/>
Fixed On Going	<input checked="" type="checkbox"/>

Select Field	Operand	Value
Customer Number	All	
Contract No.	All	
Task No	All	
Dispatch Date	All	
Dispatch Status	All	
Route	All	

	Contract Number	Task Number	Dispatch No	Customer Number	Include	Dispa
5		0000992	0001	01-ABF	<input checked="" type="checkbox"/>	4/5/21
6		0000993	0001	01-ABF	<input checked="" type="checkbox"/>	4/5/21
7	000000191	0000965	0002	01-ABF	<input checked="" type="checkbox"/>	2/6/21
8	000000191	0000983	0001	01-ABF	<input checked="" type="checkbox"/>	2/15/21
9	000000191	0000983	0002	01-ABF	<input checked="" type="checkbox"/>	2/15/21
10	000000191	0000984	0001	01-ABF	<input checked="" type="checkbox"/>	2/17/21

Clear ☒ Include Grouped By Contract Proceed Cancel Generation

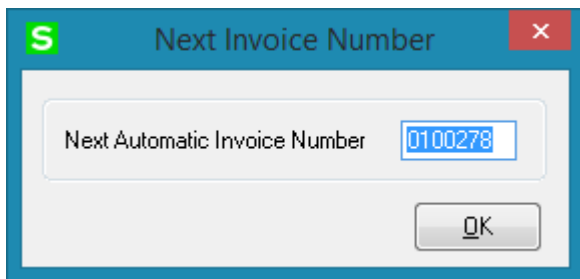
Click the **Clear** button, if you want to remove dispatches from the list according to the selections.

The **Cancel** button sets the Customer Number, Contract Number, Dispatch Date and Billing Type to default selections.

Place or remove checkmarks in the **Include** column of the list. Auto generation will generate invoices only for the dispatches marked as "Include". Use the Select All or **Deselect All** buttons to select/deselect all the dispatches loaded in the grid at once.

If the **Include Grouped By Contract** check box is selected while setting or removing any checkmark in the **Include** column, all the lines associated with Contract No. will be selected or deselected. If the **Include Grouped By Contract** check box is not selected, while setting or removing any checkmark in the **Include** column, only current Disp. No of the Contract will be selected or deselected.

To start generating invoices, click the **Generation** button.



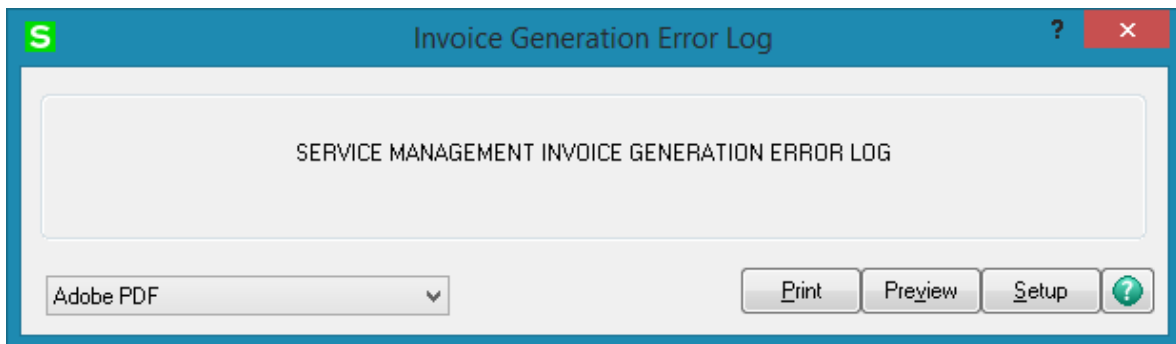
A small dialog box titled "Next Invoice Number" with a green 'S' icon and a red close button. It contains a text field labeled "Next Automatic Invoice Number" with the value "0100278" and an "OK" button.

Separate invoices will be generated for each task during Auto Invoice Generation if the **Separate Invoice** flag is set on the Tasks.

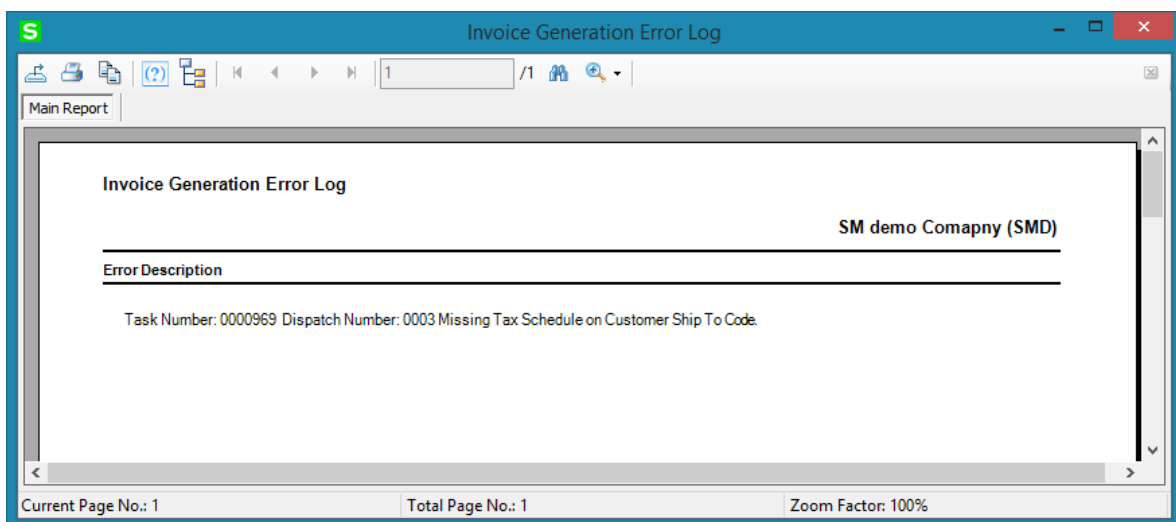
If the **Separate Invoice** flag is not set on the Tasks included in the Invoice generation, a single Invoice will be generated for all Tasks of the same Contract.

Separate invoice will be generated for the Tasks, irrespective of the Separate Invoice option if the Default Payment Type is not set to None on the Task Header.

If for some reason the program is not able to generate Invoice(s) for the selected dispatches, an error log is printed and the Dispatch remains open.



A window titled "Invoice Generation Error Log" with a green 'S' icon, a question mark, and a red close button. It contains a large text area with the text "SERVICE MANAGEMENT INVOICE GENERATION ERROR LOG". Below the text area is a dropdown menu set to "Adobe PDF" and four buttons: "Print", "Preview", "Setup", and a green help icon.



A report viewer window titled "Invoice Generation Error Log" with a green 'S' icon and standard window controls. It displays a report with the title "Invoice Generation Error Log" and the company name "SM demo Comapny (SMD)". The report content includes the text "Error Description" and "Task Number: 0000969 Dispatch Number: 0003 Missing Tax Schedule on Customer Ship To Code." The status bar at the bottom shows "Current Page No.: 1", "Total Page No.: 1", and "Zoom Factor: 100%".

After Invoice generation is completed the Auto Close Tasks Selection screen is popup allowing the user to close also the Tasks if needed.

Select Field	Operand	Value	
Customer Number	All		
Task No	All		
Task Type	All		
Task Status	All		


	Task No.	Task Description	Customer Number	Task Status	Contract No.	Include	
1	0000965	3rd Party on-site mixed dev	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>	
2	0000983	3rd Party on-site mixed dev	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>	
3	0000984	3rd Party on-site mixed dev	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>	
4	0000992		01-ABF	Entered		<input checked="" type="checkbox"/>	
5	0000993		01-ABF	Entered		<input checked="" type="checkbox"/>	
6	0000994	Install	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>	
7	0000995	Install	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>	

Clear Proceed Cancel Close

Multi Contract Invoice Generation

There is also an option of generating multi contract Invoices for each processed task having several dispatches with different contracts assigned.

S Auto Generate Invoice Selection (SMD) 5/19/2017

Bill Freq Code Include Tasks Without Contract ☐ Batch 00043 

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input type="checkbox"/>
Fixed Percent Complete	<input checked="" type="checkbox"/>
Fixed On Going	<input checked="" type="checkbox"/>

Select Field	Operand	Value
Customer Number	All	
Contract No.	All	
Task No	All	
Dispatch Date	All	
Dispatch Status	All	
Route	All	

	Contract Number	Task Number	Dispatch No	ustomer Numb	Include	Dispatch Date	Dispa
1	000000191	0000989	0001	01-ABF	<input checked="" type="checkbox"/>	2/20/2017	0
2	000000191	0000989	0002	01-ABF	<input checked="" type="checkbox"/>	5/19/2017	0

Clear ☒ Include Grouped By Contract Proceed Cancel Generation

The Contract Number shown on the generation screen is the Contract of the Task Header and not the Contract of the Dispatch:

Here is an example of Multi contract Invoice generated for a Task having 2 dispatches with different Contract numbers:

S/O Invoice Data Entry (SMD) 5/19/2017

Invoice No. 0100285 Batch 00043 Defaults... Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

Invoice Date 5/19/2017 Invoice Type Standard Invoice Sales Order Number

Customer No. 01-ABF American Business Futures

Contract No. Multi Contract ☒ Cust PO

Order Status 1 Step

Ship Date 5/19/2017

Due Date 6/18/2017

Discount Date 5/19/2017

Warehouse 001 EAST WAREHOUSE

Sales Tax Schedule CA California

Apply to Inv No. 2 American Business Futures

Ship To Addr 01 Net 30 Days

Terms Code SHIP PROD FOB Tracking...

Confirm To John Quinn

E-mail artie@abf.com

Fax No. Batch Fax

Comment

Salesperson 0100 Jim Kentley

Split Comm. No Split Comm...

Quick Print Accept Cancel Delete

The **Multi Contract** checkbox added on the Header tab of the Invoice Data Entry is automatically checked indicating the Invoice contains lines for different Contracts. For Multi Contract invoices the Contract number field on the Invoice Header is blank and disabled.

S/O Invoice Data Entry (SMD) 5/19/2017

Invoice No. 0100285 Batch 00043

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

Quick Row 1

	Item Code	Contract No	Ordered	Shipped	Unit Price	Extension
1	1001-HON-H252LK	000000182	2.00	2.00	87.000	174.00
2	/ADAMINSTALL	000000190	1.00	1.00	55.000	55.00
3	*ADAMINSTALL	000000190	2.25	2.25	55.000	123.75
4			.00	.00	.000	.00

Total Amount 352.75

Quick Print

Accept Cancel Delete

The Contract number field added to the lines grid displays the Contract number specified on the Dispatch header.

The Contract number field added to the **A/R Invoice History** lines grid is populated when the multi contract invoice is updated.

S A/R Invoice History Inquiry (SMD) 5/19/2017

Invoice No. 0100285 🔍 🔑 ⏪ ⏩ 📄 Type INV Date 5/19/2017 Current... Tax Detail...
Source S/O Order No. Split Comm... Shipping ...

1. Main | 2. Lines |

ine ...	Item Code	Item ...	Shipped	Unit Price	Extension	Unit Cost	Comment	Contract No
1	1001-HON-H...	HON...	2.00	87.000	174.00	37.1...		000000182
2	/ADAMINST...	Instal...	1.00	55.000	55.00	.000		000000190
3	*ADAMINST...	Instal...	2.25	55.000	123.75	20.0...		000000190

⏪ ⏩

🗨️ 📄 🖨️ ?

OK 🖨️ ?

The Contract number is available also in the **Invoice History Printing**:

Invoice History Printing

Main Report

1

SM demo Comapny 0100285-IN
5/19/2017

0100
01-ABF

Avnet Processing Corp
3361 W. Kenosha
Powers Building
Suite 100
Racine, WI 53120

American Business Futures
Racine Warehouse
5411 Kendrick Place
Racine, WI 53120

John Quinn

SHIP PROD Net 30 Days

1001-HON-H252LK	EACH	2.00	2.00	0.00	87.000	174.00
HON 2 DRAWER LETTER FLE W/ LCK						
/ADAMINSTALL	EACH	1.00	1.00	0.00	55.000	55.00
Installation Services						
*ADAMINSTALL	EACH	2.25	2.25	0.00	55.000	123.75
Installation Services						

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

Auto Generate E-Mails Selection

The **Auto E-mail Generation** program can be used to create and send emails to Customers, Technicians and Contacts with the copy of the Task report attached.

Auto Generation E-Mail Selection (SMD) 5/19/2017

Send To Customer ☒ Send To Contact ☒ Send to Technician ☒ Attach Report ☒

Select Field	Operand	Value
Customer Number	All	
Technician Code	All	
Task No	All	
Task Type	All	
Task Status	All	
Dispatch Status	All	
Dispatch Date	All	

Task Number	Dispatch No	Customer Number	Task Type	Task Status	Dispatch Status	Include	Cust
-------------	-------------	-----------------	-----------	-------------	-----------------	---------	------

Clear Proceed Cancel Generation

You can select respective checkboxes to send emails to Customers, Contacts and Technicians.

You can choose to process all the customers, technicians and tasks or only the selected ones. Also you can filter tasks and dispatches by Type and Status.

Select the **Attach Report** check box to send Task report (in a PDF format) attached to the emails.

Note: It is necessary to have Paperless Office setup properly and working in order to have the Task printing PDF attached while sending emails.

Enter the E-mail addresses of Customers, Contacts, and Technicians in the corresponding columns.

The records are loaded in the grid upon pressing Proceed button. If there are records already loaded in the grid, pressing **Proceed** button will add newly selected records to the existing list.

Select Field	Operand	Value
Customer Number	All	
Technician Code	All	
Task No	All	
Task Type	All	
Task Status	All	
Dispatch Status	All	
Dispatch Date	All	

	Task Number	Dispatch	Customer Number	Task Type	Task Status	Dispatch Status	Include	Customer Email Address	Include	Technician Email Address	Include	Contact Email Address
1	0000989		01-ABF	Service Call	Entered		<input checked="" type="checkbox"/>	gohar_hov@l...	<input checked="" type="checkbox"/>	Adam@hotmail...	<input checked="" type="checkbox"/>	john@abf.com
2	0000985	0001	01-ABF	Service Call	Entered	Open	<input checked="" type="checkbox"/>	artie@abf.com	<input type="checkbox"/>		<input checked="" type="checkbox"/>	john@abf.com
3	0000986		01-ABF	Service Call	Entered		<input checked="" type="checkbox"/>	artie@abf.com	<input type="checkbox"/>		<input checked="" type="checkbox"/>	john@abf.com
4	0000987		01-ABF	Service Call	Entered		<input checked="" type="checkbox"/>	artie@abf.com	<input type="checkbox"/>		<input checked="" type="checkbox"/>	john@abf.com
5	0000988	0001	01-ABF	Service Call	Entered	Open	<input checked="" type="checkbox"/>	artie@abf.com	<input checked="" type="checkbox"/>	Adam@hotmail...	<input checked="" type="checkbox"/>	john@abf.com

Clear Proceed Cancel Generation

If the Customer, Technician and Contact have email addresses assigned those addresses are automatically loaded with Include checkbox selected.

Click the **Clear** button, if you want to remove records from the list according to the selections.

The **Cancel** button sets the selection criteria to defaults.

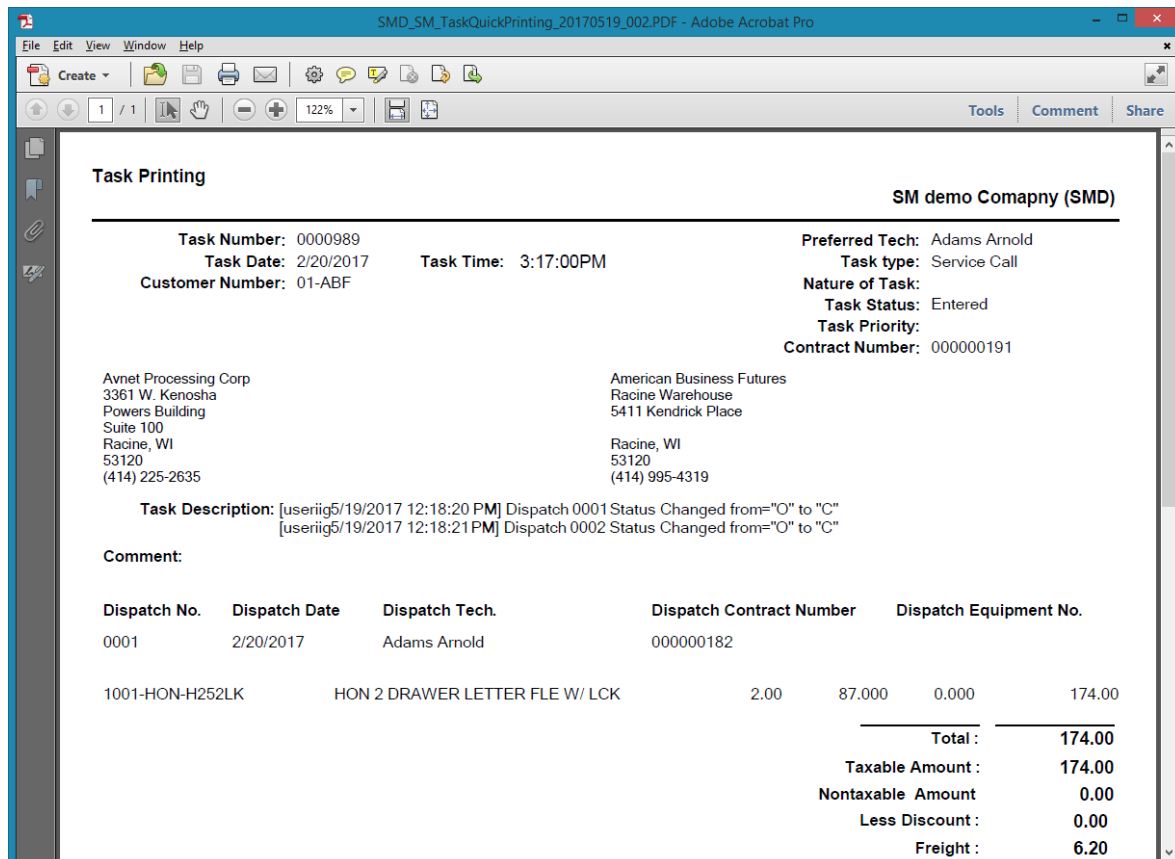
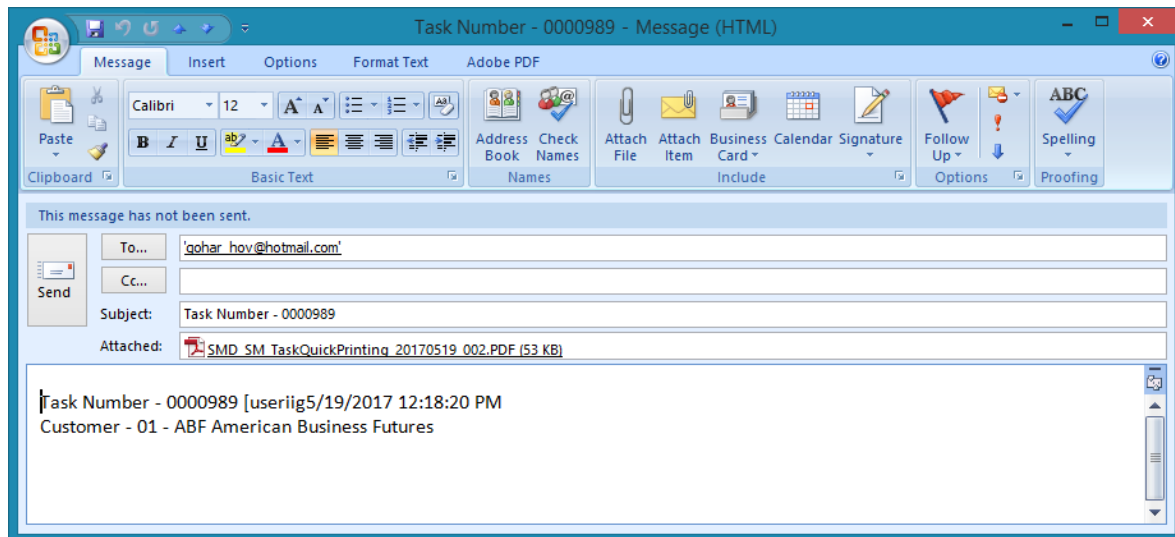
Auto generation will generate emails only for the records with **Include** checkbox selected.

To start generating emails, click the **Generation** button.

After generating emails, corresponding lines are removed from the list.

Emails will be sent to the addresses entered in the grid.

Here is an example of email sent to the specified email addresses:



Note: It is necessary to setup Paperless Office properly and working in order to have the Task printing PDF attached while sending emails.

Auto Close Task Selection

The **Close Task Selection** program allows closing multiple tasks at once.

Select Field	Operand	Value
Customer Number	All	
Task No	All	
Task Type	All	
Task Status	All	

	Task No.	Task Description	Customer Number	Task Status	Contract No.	Include
1	0000965	3rd Party on-site mixed dev	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>
2	0000983	3rd Party on-site mixed dev	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>
3	0000984	3rd Party on-site mixed dev	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>
4	0000989	[user:ig5/19/2017 12:18:2	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>
5	0000992		01-ABF	Entered		<input checked="" type="checkbox"/>
6	0000993		01-ABF	Entered		<input checked="" type="checkbox"/>
7	0000994	Install	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>
8	0000995	Install	01-ABF	Entered	000000191	<input checked="" type="checkbox"/>

Clear Proceed Cancel Close

Tasks can be selected by **Customer Number**, **Task Number**, **Task Date** and **Task Status**.

Upon pressing Proceed button the tasks not having active dispatches are loaded in the grid with **Include** checkbox automatically selected.

Pressing **Close** button will close all Tasks for which the Include checkbox is selected. The closed Tasks will be moved to the Task History if the **Retain Task Entry History** option is turned on in the SM Options.

Auto Generate Contract Sales Documents

The **Auto Generate Contract Sales Documents** program may be used to easily generate Invoices, Standard Orders and Price Quotes for the items of Contracts. Tasks of the contract are not taken into account.

Select Field	Operand	Value
Customer Number	All	
Contract No	All	

Contract No.	Customer No.	Freq Code	Amount From	Document	Total Amount
--------------	--------------	-----------	-------------	----------	--------------

You can choose to process all the customers and contracts or only selected ones. Also you can filter the selection by **Bill Frequency Code**.

The **Control Date for Renewal** field allows for specifying the date for Contract renewal. This date should be greater than the **Contract Item Ending Date** in order to have the Contract Item selected for renewal. For contract renewals it is necessary to generate the Invoice with **Amount From** option set to Items.

After making selections, click **Proceed** button to display the list of contracts matching these selections. The Proceed button adds newly selected contracts to the list of already selected ones.

Click the **Clear** button if you want to remove contracts from the list according to the selections.

The **Cancel** button sets the selections to defaults.

Place or remove checkmarks in the **Include** column of the list. Auto generation will generate invoices only for checked contracts.

S Auto Generate Contract Sales Documents (SMD) 5/19/2017

Bill Freq Code Control Date for Renewal

Select Field	Operand	Value
Customer Number	All	
Contract No	All	

	Contract No.	Customer No.	eq Co	Amount From	Document	Total Amount	Include
1	000000001	02-ALLENAP		Items	Invoice	275.00	<input checked="" type="checkbox"/>
2	000000006	02-ORANGE		Items	Invoice	340.00	<input checked="" type="checkbox"/>
3	000000008	01-RSSUPPL		Header	Invoice	1,500.00	<input checked="" type="checkbox"/>
4	000000009	02-CAPRI		Header	Invoice	65,000.00	<input checked="" type="checkbox"/>
5	000000010	02-JELLCO		Items	Invoice	770.00	<input checked="" type="checkbox"/>
6	000000011	02-ORANGE		Header	Standard Orc	1,200.00	<input checked="" type="checkbox"/>
7	000000012	02-JELLCO		Items	Invoice	530.00	<input checked="" type="checkbox"/>

Clear Proceed Cancel Generation

To start generating Orders/Invoices, click the **Generation** button.

Payroll Batch Entry

Select the **Payroll Batch Entry** program under the **Service Management Main** menu.

Employee No.	Employee Name	Earnings	Earnings Desc.	Reported Hours	Updated Hours	Difference	Changed	Overtime	Overtime Hours
--------------	---------------	----------	----------------	----------------	---------------	------------	---------	----------	----------------

To create new batch, enter **Starting** and **Ending** Dates or use calendar clicking the **Calendar** buttons. When selecting the **Starting** date, the **Ending** date is automatically calculated by adding a week to the **Starting** date. The **Ending** date can be changed after that, if needed. When the screen is opened first, the dates are set to define the last week, that is, the **Ending** date is set to a day before the current system date, and the **Starting** date is calculated respectively.

Click the **Proceed** button.

	Employee No.	Employee Name	Earnings	Earnings Desc.	Reported Hours	Updated Hours	Difference	Changed	Overtime	Overtime Hours
1	11-0000100	THOMAS JERRY A.	000001	Regular	4.25	4.25	.00	<input type="checkbox"/>	<input type="checkbox"/>	.00
2	11-0000105	JENKINS ALLEN	000001	Regular	8.00	8.00	.00	<input type="checkbox"/>	<input type="checkbox"/>	11.75
3	11-0000105	JENKINS ALLEN	000002	Overtime	4.76	4.76	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00
4	11-0000105	JENKINS ALLEN	000003	Doubletime	6.99	6.99	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00

The program will load the Labor lines of the dispatches meeting the following conditions:

- **Dispatch Starting Date** falls in the selected time interval.
- The **Technician** on the Dispatch Labor line has an employee code assigned in the Technician Code Maintenance.
- The Dispatch line Labor has the Regular and Overtime Earning Codes specified on the Labor Code Maintenance.

Check the **Include History** box to search for labor lines of current period in history too. By default this setting will be the same as the **Include History in Payroll Batch** in the **Service Management Options** screen, and can be changed for the current batch.

To open an existing batch, click the **Open Batch** button, and select the previously saved batch.

The **Updated Hours** field displays the information from the Labors for the dispatches and cannot be changed. When trying to change or delete a Labor line already included in a Payroll Batch, from the Dispatch Data Entry program, a warning message is displayed to confirm the change.

The **Reported Hours** fields in the list can be modified. If the batch is already saved, it can be opened for reviewing and modifying the entered Reported Hours.

Difference Hours fields display differences between **Reported** and **Updated** Hours. Difference is displayed in blue if it is negative and in red if it is positive.

S Payroll Batch Entry (SMD) 3/16/2018

Starting 3/8/2018 Ending 3/18/2018 Include History ☒ Batch Name 030818_03171SMD

	Employee No.	Employee Name	Earnings	Earnings Desc.	Reported Hours	Updated Hours	Difference	Changed	Overtime	Overtime Hours
1	11-0000100	THOMAS JERRY A.	000001	Regular	5.25	4.25	1.00	<input type="checkbox"/>	<input type="checkbox"/>	.00
2	11-0000105	JENKINS ALLEN	000001	Regular	7.75	8.00	.25	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11.75
3	11-0000105	JENKINS ALLEN	000002	Overtime	4.76	4.76	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00
4	11-0000105	JENKINS ALLEN	000003	Doubletime	6.99	6.99	.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00

Check Proceed Update Cancel End

For a new batch, enter the **Batch Name** and click the **Generate** button. The batch is generated and saved.

For a previously entered batch, click the **Check** button to find out if the Labor lines in dispatches have been changed, added or removed since the entry of the batch.

The following message displays the numbers of changed or deleted, and added lines.

S Sage 100

Changed 1 line(s)
Deleted 0 line(s)
Added: 0 line(s).

OK

Click the **Refresh** button to reflect the changes.

When a Payroll Batch is used in the Payroll Data Entry, the Updated Hours are payable. Select a line and click the **Drill Down** button to see the details of hours for the selected Employee.

The screenshot shows a software window titled "Employee Drill Down". At the top left is a green square icon with a white "S". The window contains several input fields and a table. The fields are: "Employee No." with value "11-0000105", "JENKINS ALLEN", "Updated Hours" with value "8.00", "Earn CD" with value "000001", "Regular", and "Overtime Hours" with value "13.75". Below these is a table with columns: "W.O.-Dispatch No", "Date", "Labor", "Hours", and "Status". The table contains three rows of data. At the bottom right of the window are "OK" and "Print" buttons.

W.O.-Dispatch No	Date	Labor	Hours	Status
0000978-0002	3/16/2018	BUILD	8.00	Open
0000978-0002	3/16/2018	INSTALL	2.75	Open
0000978-0002	3/16/2018	INSTALL	11.00	Open

Click **Print** button in the **Employee Drill Down** screen. Here is an example of Drill Down information printout:

Payroll Drill Down				
SM Demo Company (SMD)				
11-0000105 JENKINS ALLEN 000001 Regular				
W.O.-Dispatch No.	Date	Labor	Hours	Status
0000978-0002	3/16/2018	BUILD	8.00	Open
0000978-0002	3/16/2018	INSTALL	2.75	Open
0000978-0002	3/16/2018	INSTALL	11.00	Open
Regular:			8.00	
Overtime:			13.75	
Reported Hours:			8.00	
Not Turned In:			0.00	

In the **Payroll Batch Entry** screen, click the **Print** button.

When printing the Payroll Batch the user may select to print all lines or only the ones with non-zero Difference Hours:

MATERIAL PRODUCTION PLANNING PAYROLL BATCH PRINTING

Print All Records

Adobe PDF Print Preview Setup

Here is an example of printout:

Payroll Batch Printing

- □ ×

/1

Main Report

Payroll Batch Printing

SM Demo Company (SMD)

Batch Name: 030818_03171smd (All Records)

Employee No.		Earn CD		Hrs. Rep.	Hrs. Upd.	Not Turned In	Overtime
11-0000100	THOMAS JERRY A.	000001	Regular	4.25	4.25	0.00	0.00
	W.O.-Dispatch No.	Date	Labor	Hours	Status		
	0000978-0001	3/15/2018	BUILD	2.00	Open		
	0000978-0001	3/15/2018	INSTALL	2.25	Open		
				4.25			
11-0000105	JENKINS ALLEN	000001	Regular	8.00	8.00	0.00	13.75
	W.O.-Dispatch No.	Date	Labor	Hours	Status		
	0000978-0002	3/16/2018	BUILD	8.00	Open		
	0000978-0002	3/16/2018	INSTALL	2.75	Open		
	0000978-0002	3/16/2018	INSTALL	11.00	Open		
				21.75			
11-0000105	JENKINS ALLEN	000002	Overtime	5.06	5.06	0.00	Yes
11-0000105	JENKINS ALLEN	000003	Doubletime	8.69	8.69	0.00	Yes

Current Page No.: 1

Total Page No.: 1

Zoom Factor: 100%

In the **Payroll Batch Entry**, click the **Update** button to save changes in the file.

The Dispatch line will not be selected if it is saved in some batch once.

Task/Dispatch Batch Update

The **Task/Dispatch Batch Update** program has been added under the **Service Management Main** menu to allow performing batch actions such as Delete, Close, Undo PM and Print for the selected Tasks

[illegible]

The following selection criteria are available:

- Task No
- Task Date
- Contract No
- Customer Number
- PM Code
- Nature of Task
- Technician Code
- Item Code

- Task Schedule Date
- Task Due Date

Pressing **Select** button will load all records meeting the selection criteria in the list box with **Include** checkbox selected.

Task/Dispatch Batch Update (SMD) 5/19/2017

Action: Close

Select Field	Operand	Value
Task No.	All	
Task Date	All	
Contract No.	All	
Customer Number	All	
PM Code	All	
Nature Of Task	All	
Technician Code	All	
Item Code	All	
Task Schedule Date	All	
Task Due Date	All	

	Task No.	Task Description	Customer No.	Contract No.	Include
1	0000944		01-ABF		<input checked="" type="checkbox"/>
2	0000946	Cabinet Work / holes	01-ABF		<input checked="" type="checkbox"/>
3	0000947	Installation of software	01-ABF		<input checked="" type="checkbox"/>
4	0000948	Pull Material	01-ABF		<input checked="" type="checkbox"/>
5	0000949	Cutting	01-ABF		<input checked="" type="checkbox"/>
6	0000950	Sewing	01-ABF		<input checked="" type="checkbox"/>
7	0000951	Pull Material	01-ABF		<input checked="" type="checkbox"/>
8	0000953	Test Unit	01-ABF		<input checked="" type="checkbox"/>

Clear Select Cancel Proceed

Clear button removes the selected records from worktable. The selected records are automatically removed from worktable upon closing the screen.

Action- Delete, Close, Undo PM and Print actions are available.

Delete and **Close** actions allow for deleting and closing Tasks, which don't have any open Dispatch.

Undo PM action allows for deleting all the PM tasks/dispatches created. This action is available only if the **PM Task Generate Based on Task Close Date** option is enabled in the S/M Options.

Print action allows for printing all Tasks (with associated Dispatches) loaded in the list box with Include checkbox selected.

Calculate Quantity to Produce/Purchase

The **Calculate Quantity to Produce/Purchase** program added under the **Service Management Main** menu is designated to simplify and speed up the work processes of purchasing and the production managers, enabling them to plan more effectively.

This program allows for processing the selected Items and calculating quantity requirements for each Item based on selected MRP run options. The program calculates also the component requirements for each Item by Warehouse.

MRP Run Processing Options:

Show Items With Zero Req. Qty- select this checkbox if you want to load the Items with zero quantity required into the material production planning grid.

Include Items Based on SO Selection Only – select this checkbox to include in the demand calculation only the items of the selected Order(s) lines. If the ordered Item is a Bill the program uses the bill of materials structure to disassemble all components into the lowest level items and loads also those items.

Calculate Demand Based on SO – this option is enabled upon selecting the **Include Items Based on SO Selection Only** checkbox. If checked the demand is determined based on the open Sales Orders for the selected Ship Date.

Add SO Items to Selection – this checkbox is enabled only if the above two options are turned off. It allows for adding also Sales Orders' Items to the Items selected based on other selection criteria.

The **Machine Code** and **Start Date/Time** options are used for Manufacturing Task/Dispatch generation.

	Item Code	Whse	Quantity On Hand	Quantity On Order	Quantity On Forecast	Quantity On Inventory	Availability	Run Time	Material Requirement	Order Meter	Point	Order Quantity	On Hand	Recommended Qty	Machine Code	Include
1	1001-HON-H252	000	.00	11.00	.00	.00	52.00	.00	52.00	Eco	40.00	100.00	300.00	100.00		<input checked="" type="checkbox"/>
2	1001-HON-H252	001	.00	112.00	.00	.00	51.00	.00	51.00	Max	5.00	10.00	20.00	.00		<input type="checkbox"/>
3	1001-HON-H252	002	10.00	12.00	.00	.00	9.00	.00	9.00	Max	10.00	20.00	50.00	41.00		<input checked="" type="checkbox"/>
4	1001-HON-H252	097	.00	.00	.00	.00	.00	.00	.00	Eco	.00	.00	.00	.00		<input type="checkbox"/>
5	1001-HON-H252LK	000	.00	2.00	.00	.00	52.00	.00	52.00	Eco	30.00	80.00	200.00	80.00		<input type="checkbox"/>
6	1001-HON-H252LK	001	.00	.00	.00	.00	9.00	.00	9.00	Max	5.00	10.00	20.00	29.00		<input checked="" type="checkbox"/>
7	1001-HON-H252LK	002	.00	14.00	.00	.00	8.00	.00	8.00	Max	5.00	10.00	20.00	12.00		<input type="checkbox"/>
8	1001-HON-H252LK	097	.00	.00	.00	.00	.00	.00	.00	Eco	.00	.00	.00	.00		<input type="checkbox"/>
9	1001-HON-H254	000	.00	3.00	.00	.00	68.00	.00	68.00	Eco	50.00	100.00	300.00	100.00		<input type="checkbox"/>
10	1001-HON-H254	001	.00	.00	.00	.00	1.00	.00	1.00	Max	10.00	20.00	50.00	49.00		<input type="checkbox"/>
11	1001-HON-H254	002	2.00	25.00	.00	.00	7.00	.00	7.00	Max	5.00	10.00	20.00	13.00		<input type="checkbox"/>
12	1001-HON-H254LK	000	.00	8.00	.00	.00	37.00	.00	37.00	Eco	20.00	60.00	100.00	60.00		<input type="checkbox"/>
13	1001-HON-H254LK	001	.00	3.00	.00	.00	7.00	.00	7.00	Max	5.00	10.00	20.00	13.00		<input type="checkbox"/>
14	1001-HON-H254LK	002	2.00	3.00	.00	.00	1.00	.00	1.00	Max	5.00	10.00	20.00	21.00		<input type="checkbox"/>
15	2480-8-50	000	.00	7.00	.00	.00	1,088.00	.00	088.00	Eco	300.00	900.00	2,000.00	.00		<input type="checkbox"/>
16	2480-8-50	001	.00	.00	.00	.00	154.00	.00	154.00	Max	200.00	600.00	800.00	646.00		<input type="checkbox"/>
17	2480-8-50	002	20.00	100.00	.00	.00	190.00	.00	190.00	Max	200.00	700.00	1,000.00	810.00		<input type="checkbox"/>
18	2480-8-50	097	.00	.00	.00	.00	.00	.00	.00	Eco	.00	.00	.00	.00		<input type="checkbox"/>
19	2481-5-50	000	1.00	150.00	.00	.00	822.00	.00	822.00	Eco	300.00	800.00	2,000.00	.00		<input type="checkbox"/>
20	2481-5-50	001	.00	250.00	.00	.00	326.00	.00	326.00	Max	100.00	300.00	700.00	374.00		<input type="checkbox"/>
21	2481-5-50	002	.00	175.00	.00	.00	240.00	.00	240.00	Max	100.00	300.00	800.00	560.00		<input type="checkbox"/>

The following selection options may be applied:

- Item code
- Order Number
- Ship Date
- Warehouse

MRP columns:

- **Item Code** – item number from inventory master file. The program lists all components (purchased or manufactured) to meet the selected items demand
- **Whse** – the warehouse code for the information.
- **Vendor No** – vendor number for purchase items. The Make or Buy drop down in the inventory file is used to determine if a PO is to be generated for the item.
- **Qty On Hand (QOH)** – quantity on hand for the warehouse
- **Qty on SO (SOQ)** – sales order quantity represents quantity on sales orders.

- **Qty on BO (BOQ)** – indicates quantity on back orders.
- **Qty on PO (POQ)** - quantity on purchase orders
- **Qty on Task (TOQ)** - quantity on existing Tasks
- **Qty Req for Task (QRT)** component quantity needed for planned tasks
- **Qty Avail (QAVL)** – is calculated using the formula below:
$$QAVL = QOH - SOQ - BOQ + POQ + TOQ - QRT$$
- **MRP Run Requirements (Demand New Requirement, DNR)** - this value represents the requirements on items entered on the bill of material line's tab for any BOM item with negative Qty Avail (QAVL) value. The Demand New Requirement quantity is calculated for component Items only, it doesn't make sense for Bill parent Item. It is calculated as the Bill Recommended Qty multiplied by the component's Quantity/Bill.
- **Qty Avail MRP Run (MRPQ)**, this value is calculated as follows:
 - $MRPQ = QAVL - DNR$
- **Reorder Method** – MAX, ROP or EOQ.
- **Recommended Qty** – is calculated based on the Reorder method as follows:
 - For Max Stock level Reorder method, if the Qty Available is below Reorder, Recommended Qty=Buf Max Quantity –MRPQ (Qty Avail MRP Run)
 - For Reorder Point method if Available quantity is below the Reorder, Recommended Qty=Reorder Point Quantity – MRPQ (Qty Avail MRP Run)
 - For Economic Qty method, if Available is below reorder, Recommended Qty=Economic Ord. Quantity
- **Machine Code**- it is necessary to select a Machine Code setup in the Machine Code Maintenance.
- **Include**- select this checkbox to include the line in the Manufacturing WO generation

The following actions are available:

- **Generate Manufacturing Task/Dispatch**
- **Generate PO**

Generate Manufacturing Task/Dispatch- press this button to generate work orders based on the demand calculated.

Generate PO- press this button to generate Purchase Orders for Items with Buy Procurement type. Purchase orders are generated both for components of BOM items or items sold on sales order.

Here is an example of material requirement calculation for Bill Item BEL2500. Press **Proceed** after making the necessary selections:

S Calculate Quantity to Produce/Purchase

Show Items With Zero Req Qty ☐ Include Items Based On SO Selection Only ☐

Calculate Demand Based On SO ☐

Add SO Items To Selection ☐

Machine Code Start Date 5/19/2017 Time 12:00 AM


Select Field	Operand	Value
Item Code	All	
Order Number	All	
Ship Date	All	

	Item Code	Whse	Vendor No.	Qty On Hand	Quantity On	Quantity On	Quantity On	On T.Req For	Quantity Ava	MRP Run Req	Avail MRP	Order Mettr	Point (Order	In Har	men	chine C	Include	
1	4886-18-14-3	001	01-CONT	2.00	5.00	.00	60.00	.00	3.00	50.00	10.00	40.00	Max S	10.00	10.00	50.00	.00	M02	<input checked="" type="checkbox"/>
2	6655	001	01-CONT	1.00	12.00	.00	88.00	.00	6.00	69.00	20.00	49.00	Max S	10.00	10.00	70.00	.00	M01	<input checked="" type="checkbox"/>
3	BEL2500	001		2.00	15.00	.00	.00	3.00	.00	10.00	.00	10.00	Econc	.00	.00	.00	.00	M02	<input checked="" type="checkbox"/>

Proceed Clear

Gen. Manufacturing Generate PO Accept Cancel

The Bill Item is loaded in the grid with its components.

Select the Include checkbox. You can **Include** all lines by pressing the  **Select All** button or just clicking in the box to select an individual line.

The buttons added on the right hand of the grid enable drill down to Item Inquiry, Bill Item Inquiry (enabled for Bill Items), Where used Inquiry (enabled for component Items) and Item Vendor Maintenance.

Here is the Task with respective Manufacturing Dispatch generated for Make Item# BEL2500 by the **Gen Manufacturing** button:

Task Data Entry (SMD) 5/19/2017

Task No. 0000998 Assembly Unit Defaults...

1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig

Task Date 5/19/2017 Task Time 04:54 PM Task Type M Manufacturing

Customer No. 01-ABF American Business Futures

Deposit Payment Type NONE Task Total .00 Tax .00

Task Status E Entered Salesperson 0100 Jim Kentley

Contract No.

Job Site Code 2 American Business Futures

Job Site Contact John Quinn

Nature of Task

Preferred Tech BRN Brown John

Preferred Mach M02 Machine 02

Item Number BEL2500

Lot/Serial No. Territory ARIZON Region Arizona

Tax Schedule

Default Misc Item ADAMINSTALL Installation Services

Cust PO

Priority Code

Bill Freq Code 1

Route StopNo 0

POS Terminal

Separate Invoice ☐ Equipment...

Response

Coverage

Quote Amount .00

Scheduled Date 5/19/2017 Time 04:54 PM

Due Date 5/19/2017 Time 04:54 PM

Quote Hours .00 Disp

Documents Path \\GOHAR\d\MAS\MAS2017\SMP\MAS90\Documents\SMD\Tasks\0000998

Quick Print BMA Copy From... Quick Email Text Message Accept Cancel Delete

The **Customer No** of the generated Task is the **Default MFG Task Customer** entered in the **Service Management Options** window.

Components are loaded from the BOM into the generated Dispatch.

B/M Production is automatically generated upon closing the Dispatch. The Production Generation screen is opened with the quantity on Dispatch defaulted to Quantity Produced. The user is allowed for entry of quantity produced

Here is the Production Entry generated after the manufacturing Dispatch is closed:

Production Entry (SMD) 5/19/2017

Production Number: 0000004 Batch: 00002 Defaults...

1. Header 2. Lines

Production Date: 5/19/2017

Bill Number: BEL2500 POS Terminal

Bill Type: Standard

Revision: 000

Option Code:

Quantity: 10.00

Unit of Measure: EACH

Parent Warehouse: 001 EAST WAREHOUSE

Component Warehouse: 001 EAST WAREHOUSE

Explode Sub-Assemblies: ☐

Accept Cancel Delete ?

Actual Inventory and Labor information from the Dispatch transaction is loaded into the Production Entry transaction.

When Production is generated the **On Task** (for Bill Items) and **Req for Task** (for components) quantities are released.
After the Production is updated the Bill Item **Qty On Hand** is updated by the quantity produced.

Quick Dispatch Line Entry

The **Quick Dispatch Line Entry** program allows for creating Dispatch Lines for a specific Technician without going through all the usual steps. Dispatch may be added only for an existing Task.

Task No.	Disp. No.	Disp. Date	Customer No.	Contract	Labor/Skill	Tax	Disc	Hours	Rate	Extension	Description
0000996	0002	5/17/2017	01-ABF	000000192	BUILD	TX	0.000	3.50	55.000	192.50	Building Services
0000996	0002	5/17/2017	01-ABF	000000192	BUILD	TX	0.000	.25	55.000	13.75	Building Services
0000996	0002	5/17/2017	01-ABF	000000192	BUILD	TX	0.000	4.25	82.500	350.63	Building Services

After entering/selecting a Task press the Next Dispatch number to create next sequential Dispatch for current Task. The **Dispatch Date** is defaulted to S/M module current Accounting Date. If it is changed to another date during Dispatch line entry, that date is saved and will be set for the next dispatch line until you change it manually.

The **Dispatch Starting/Ending Dates** on the Dispatch Data Entry are defaulted to the **Dispatch Date** and may be changed if needed.

The **Dispatch Date** field is disabled for existing Dispatch Lines and it can be changed by the **Edit Dispatch Date** button.

Upon changing the **Dispatch Date** for a Dispatch line in the **Quick Dispatch Line Entry**, the **Dispatch Date**, **Starting** and **Ending Dates** are respectively updated in the **Dispatch Data Entry**.

Select **Labor/Skill Code** and enter Hours Spent, Billing Rate, Extension if needed, and click **Ok** to create a Dispatch Line.

The **Tax Class** field becomes visible if the **Calculate Taxes on Labor** option is set to **Dispatch Line** in the **Service Management Options**, and the **Ship-to Address** of the Task has the **Calculate Taxes on Labor** box checked. The **Tax Class** will be defaulted to the one of the selected **Labor/Skill Code**.

The **Tax** column is hidden if the **Calculate Taxes on Labor** option is set to **None**.

The **Billing Rate** is determined by the terms of a contract (if any) covering this task. If there is no contract, the rate will be based on the **Billing Rate Calculation Priority** in the **Service Management Options** program, where the priority of the technician, skill, and labor rates is indicated.

A prompt appears about saving the special hourly rate upon changing the Rate. If **Yes** is selected in the message to save the rate, it will be applied next time when entering a new Dispatch line for the same Technician, Labor/Skill, Customer and Contract.



Click the **Start** button to register start of working for the selected Line. The Start button will be changed to **Finish**.

After finishing the work, open the Dispatch Line Entry and press **Finish** button. The program will calculate the time between the start and finish of the work and add that time to the **Hours Spent** value. When the work is started (the button is **Finish**), hold the mouse over the button, to view the Start Date/Time in the tooltip.

Quick Dispatch Line Entry (SMD) 5/19/2017

Technician: ADAM Adams Arnold

Customer No.: 01-ABF American Business Futures Contract No.: 000000192 Install

Task Number: 0000996 Unused Dispatch No.: 0002 Dispatch Date: 5/17/2017

Contract Hours: 75.15

Labor/Skill Code: BUILD Description: Building Services

Retainer: 1.00 Tax Class: TX Disc %: 0.000 Hours Spent: 3.50 Billing Rate: 75.000 Extension: 262.50

Start time: 5/19/2017 05:12 PM

Task No.	Disp. No.	Disp. Date	Customer No.	Contract	Labor/Skill	Tax	Disc	Hours	Rate	Extension	Description
0000996	0002	5/17/2017	01-ABF	000000192	BUILD	TX	0.000	3.50	75.000	262.50	Building Services
0000996	0002	5/17/2017	01-ABF	000000192	BUILD	TX	0.000	.25	55.000	13.75	Building Services
0000996	0002	5/17/2017	01-ABF	000000192	BUILD	TX	0.000	4.25	82.500	350.63	Building Services

Starting View Date: 5/1/2017

Buttons: Finish, OK, Undo, Del, Close, Totals

Clicking the **Totals** button displays the Technician total hours and the amount:

Technician Totals

Starting Date: 5/1/2017

Ending Date: 5/19/2017

Include Closed Dispatches: ☒

Number of Dispatches: 2

Total Hours: 10.25

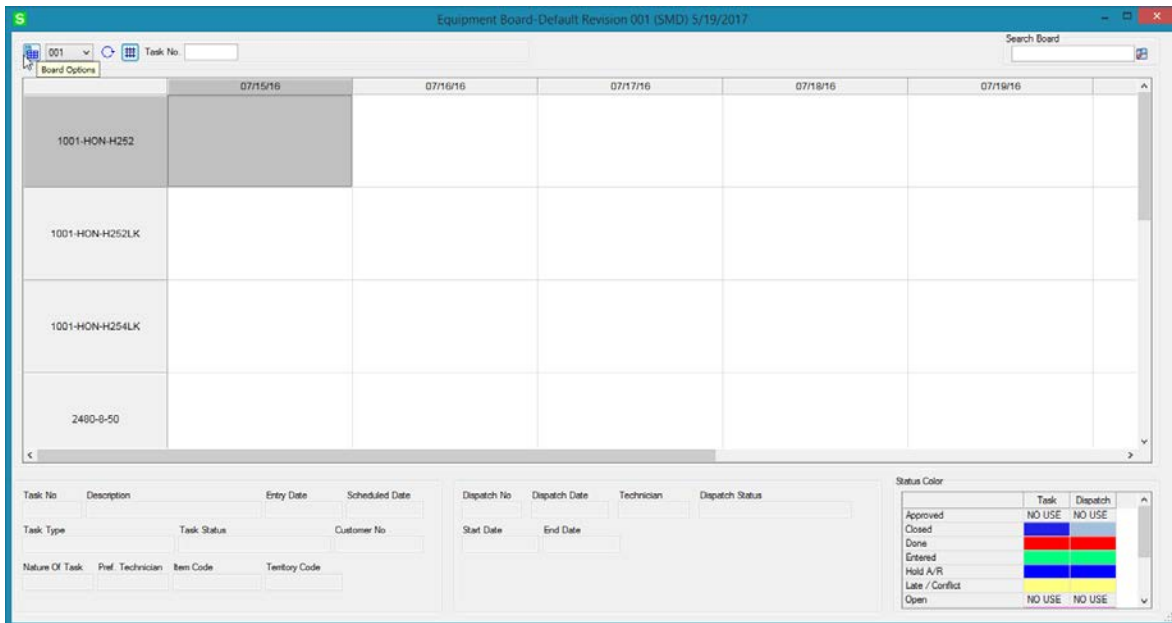
Total Amount: 680.63

OK

The **Starting Date** is defaulted to the **Starting View Date** specified on the **Quick Dispatch Line Entry** screen. The Ending Date is set to current System Date. The **Technician Totals** screen displays summary of the Lines added for the selected Technician. If the **Include Closed Dispatches** flag is set the information will include also closed dispatches and display the Total of spent Hours and Amount.

Equipment Board

The **Equipment Board** is added under the **Service Management** main menu upon installing the SMP install package. No additional installation is needed for this Board.



The **Board Options** button allows the user to setup board views. When running the Equipment Board first time a default view with “001” Revision is automatically created:

The **Filters** tab on the Equipment Board options allows for applying filters to current Dispatch Board view:

Equipment Board Options (SMD) 5/20/2017

User Logon: useriig

Revision: 001

Description: Default Revision 001 ☐ Active ☒

1. Filters | 2. Fields | 3. View

Select Field	Operand	Value
Board Date	Range	5/20/2017 5/27/2017
Board Equipment No.	All	
Customer Number	All	
Contract No.	All	
Task No.	All	
Task Date	All	
Technician	All	
Task Type	All	
Task Status	All	
Nature Of Task	All	
Machine	All	
Dispatch Status	All	
Dispatch Date	All	
Dispatch End Date	All	
Task Due Date	All	

Accept Cancel Delete

The **Board Date** field is defaulted to a date range with current Date set as the end date and starting date calculated as: “Current Date” – 7 days.

When creating new revision code (board view) the default view settings are copied and may be changed for individual revision (view). After making changes for a revision code in the Equipment Board Options, it is necessary to **Accept** the changes.

On the **Fields** tab up to 10 data fields can be selected to be displayed in the cells of the board. The fields can be selected from the drop-down lists.

You can change display name for the selected fields. After selecting a field from the drop-down list you may type a shorter or more convenient name for the selected field.

S Equipment Board Options (SMD) 5/20/2017

User Logon:

Revision: 🔍 ⏮ ⏪ ⏩ ⏭

Description: Active ☒

1. Filters | 2. Fields | 3. View

1. Task No: TaskNo\$
2. Dispatch No: DispatchNo\$
3. Dispatch Status: DispatchStatus\$
4. Customer No: CustomerNo\$
5. CustomerPONo: CustomerPONo\$

6. TechnicianCode: TechnicianCode\$
7. TerritoryCode: TerritoryCode\$
8. Route: Route\$
9. *NONE* *NONE*
10. *NONE* *NONE*

1. Task No:	TaskNo\$	▼
2. Dispatch No:	DispatchNo\$	▼
3. Dispatch Status:	DispatchStatus\$	▼
4. Customer No:	CustomerNo\$	▼
5. CustomerPONo:	CustomerPONo\$	▼

6. TechnicianCode:	TechnicianCode\$	▼
7. TerritoryCode:	TerritoryCode\$	▼
8. Route:	Route\$	▼
9. *NONE*	*NONE*	▼
10. *NONE*	*NONE*	▼

Equipment Board Options (SMD) 5/20/2017

User Logon: useriig

Revision: 001

Description: Default Revision 001 Active ☒

1. Filters 2. Fields 3. View

Show on Startup

Show History ☐

Cell Size


Column Width: 32

Row Height: 9

Accept Cancel Delete

On the **View** tab the **Show History** option is intended for displaying also the Tasks from Task History.

Here you can also set the desired size for the Board cells.

The  button allows the user to show or hide blank rows and columns.
Dates are displayed as columns and Item numbers as rows:

Equipment Board-Default Revision 001 (SMD) 5/20/2017

Item	05/20/17	05/21/17	05/22/17	05/23/17
1001-HON-H252	Task No: 0001004 Dispatch No: 0001 Dispatch Status: Late / Conflict Customer No: 01-IIG Technician: DAVI Territory: CALIF Route: R001			
1001-HON-H252LK		Task No: 0001005 Dispatch No: 0001 Dispatch Status: Done Customer No: 01-BRESLIN CustomerPONo: Technician: ADAM Territory: Route:		
1001-HON-H254LK	Task No: 0001002 Dispatch No: 0001 Dispatch Status: Entered Customer No: 01-ABF CustomerPONo: Technician: BRN Territory: ARIZON Route:		Task No: 0001003 Dispatch No: Dispatch Status: Customer No: 01-AYNET CustomerPONo: PO14444 Technician: ADAM Territory: WEST Route:	

Task No: 001 Task No: Search Board

Task No Description Entry Date Scheduled Date
Task Type Task Status Customer No
Nature Of Task Pref. Technician Item Code Territory Code

Dispatch No Dispatch Date Technician Dispatch Status
Start Date End Date

Status Color

Approved	Task	Display
Closed	NO USE	NO
Done		
Entered		
Hold A/R		

Only the Items flagged as **Display on Dispatch Board** are loaded in the **Dispatch Board**.

Item Maintenance (SMD) 5/20/2017

Item Code: 1001-HON-H252 Description: HON 2 DRAWER LETTER FILE W/O LK

1. Main 2. Additional 3. Quantity 4. History 5. Transactions 6. Orders

Product Line: C&A CABLES & ACCESSORIES

Product Type: Finished Good Weight: 35

Valuation: FIFO Volume: 0.0000

Procurement: Buy Inventory Cycle: B

Unit of Measure: Standard: EACH Purchases: EACH Sales: EACH

Display on Dispatch Board ☒

There is an option of creating new Task for an Item and a new dispatch for an existing Task.

The screenshot displays the 'Equipment Board-Default Revision 001 (SMD) 5/20/2017' window. The main area is a Gantt chart with columns for dates: 05/20/17, 05/21/17, 05/22/17, and 05/23/17. Rows represent tasks and dispatches. A context menu is open over a red cell on 05/21/17, showing options: 'Change Status', 'New', 'Open', 'Task', and 'Dispatch'. The 'Task' and 'Dispatch' options are highlighted. The task list on the left shows three tasks: 1001-HON-H252, 1001-HON-H252LK, and 1001-HON-H254LK. The bottom section contains a detailed header/footer area with fields for Task No, Description, Entry Date, Scheduled Date, Dispatch No, Dispatch Date, Technician, and Dispatch Status. A 'Status Color' legend is also visible on the right.

When creating new Task the selected Item is loaded into the Item Number field on the Task header. When creating Dispatch for a Task the Item number is loaded in the **Equipment No** field on the Dispatch Header.

The **Task's Scheduled Date/Due Date** and the **Dispatch's Starting/Ending Dates** as well as the Item No/Equipment No can be changed just by dragging/dropping the Task or Dispatch cell on the Board from one Date/Item to another.

Lookup by Item/Serial Number

The **RMA, Invoice, Sales Order, Contract, Task** and **Dispatch Data Entry** programs have been modified to provide ability to lookup the contract number by item or serial number.

The screenshot displays the 'Sales Order Entry (SMD) 5/20/2017' window. The interface includes a top navigation bar with tabs for 1. Header, 2. Address, 3. Lines, 4. Totals, and 5. Payment. The 'Header' tab is active. Key fields include: Order Number (0000384), Order Date (5/20/2017), Order Type (Standard Order), and Master/Repeating No. (empty). The Customer No. field is empty, and the Contract No. field has a binoculars icon next to it. The 'List Inventory Items by Contracts All' button is visible. The 'Ship To Addr' field is empty, and the 'Terms Code' is set to '00 No Terms'. The 'Ship Via' field is empty, and the 'FOB' field is empty. The 'Confirm To' field is empty, and the 'E-mail' field is empty. The 'Fax No.' field is empty, and the 'Batch Fax' checkbox is unchecked. The 'Comment' field is empty, and the 'Salesperson' field is empty. The 'Split Comm.' field is set to 'No', and the 'Split Comm...' button is visible. The 'Print Order' checkbox is checked, and the 'Print Pick Sheets' checkbox is checked. The 'No. of Ship Labels' field is set to '1'. The 'Quick Print Without Displaying Printing Window' checkbox is unchecked, and the 'Docs Path' field is empty. The bottom of the window has buttons for Print Order, Print Pick, Recalc Price, Accept, Cancel, and Delete.

Pressing the binoculars button added next to the Contract Number lookup will open the Items by Contract List allowing the user to select a Contract by Item.

Item Code	Contract No.	Customer No.	Lot/Serial No.	Starting Date
1001-HON-H252	000000001	02-ALLENAP		6/28/2003
1001-HON-H252	000000001	02-ALLENAP		2/26/2002
1001-HON-H252	000000023	02-ALLENAP		
1001-HON-H252	000000174	01-ABF		2/14/2014
1001-HON-H252	000000191	01-ABF		1/25/2017
1001-HON-H252	000000192	01-ABF		2/6/2017
1001-HON-H252	000000193	01-ABF		2/6/2017
1001-HON-H252	AVNET	01-AVNET		3/31/2014
1001-HON-H252LK	000000006	02-ORANGE		6/10/2004
1001-HON-H252LK	000000023	02-ALLENAP		
1001-HON-H254	000000009	02-CAPRI		2/26/2002
1001-HON-H254	000000011	02-ORANGE		
2480-8-50	000000012	02-JELLCO	1020	
2480-8-50	000000001	02-ALLENAP	FEB-203	2/26/2002

Search: Item Code (dropdown) | Begins with (dropdown) | [] (text) | Find (button)

Filters... (button)









Custom... (button) | Lookup Wizard... (button)

Select (button) | Cancel (button) | [Green Checkmark] (icon) | [Printer] (icon) | [Help] (icon)




Found 43 records




Here is the **Items by Contracts** lookup button added on the **Task Data Entry** screen.

S Task Data Entry (SMD) 5/20/2017



Task No. 0001006        




1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig


Task Date 5/20/2017  Task Time 03:29 PM Task Type S   Service Call


Customer No.   




Deposit Payment Type NONE Task Total .





Task Status E  Entered Salesperson 


Contract No.   








Job Site Code 



Job Site Contact 


Nature of Task   


Preferred Tech.    

Preferred Mach. 

Item Number       

Lot/Serial No.  List Inventory Items by Contracts All 

Tax Schedule 

Default Misc Item ADAMINSTALL  Installation Services Separate Invoice ☐

The screenshot shows a window titled "Items by Contracts" with a table of data. The table has five columns: Item Code, Contract No., Customer No., Lot/Serial No., and Starting. The first row is highlighted in blue. Below the table are search and filter controls, including a "Search" dropdown, a "Begin with" dropdown, a text input field, a "Find" button, a "Filters..." button, and buttons for "Custom...", "Lookup Wizard...", "Select", "Cancel", and a help icon. At the bottom, it says "Found 43 records".

Item Code	Contract No.	Customer No.	Lot/Serial No.	Starting
1001-HON-H252	000000001	02-ALLENAP		6/28/2
1001-HON-H252	000000001	02-ALLENAP		2/26/2
1001-HON-H252	000000023	02-ALLENAP		
1001-HON-H252	000000174	01-ABF		2/14/2
1001-HON-H252	000000191	01-ABF		1/25/2
1001-HON-H252	000000192	01-ABF		2/6/20
1001-HON-H252	000000193	01-ABF		2/6/20
1001-HON-H252	AVNET	01-AVNET		3/31/2
1001-HON-H252LK	000000006	02-ORANGE		6/10/2
1001-HON-H252LK	000000023	02-ALLENAP		
1001-HON-H254	000000009	02-CAPRI		2/26/2
1001-HON-H254	000000011	02-ORANGE		
2480-8-50	000000012	02-JELLCO	1020	
2480-8-50	000000001	02-ALLENAP	FEB-203	2/26/2
2480-8-50	000000100	01-ABF	FEB-203	2/26/2

Here is the **Items by Contracts** lookup button added on the **RMA Entry**:

S RMA Entry (SMD) 5/20/2017

RMA Number: 0000035

1. Header | 2. Address | 3. Lines

RMA Date: 5/20/2017

Customer No.:

Contract No.:

List Inventory Items by Contracts All

RMA Status: New

Expire Date: 6/19/2017

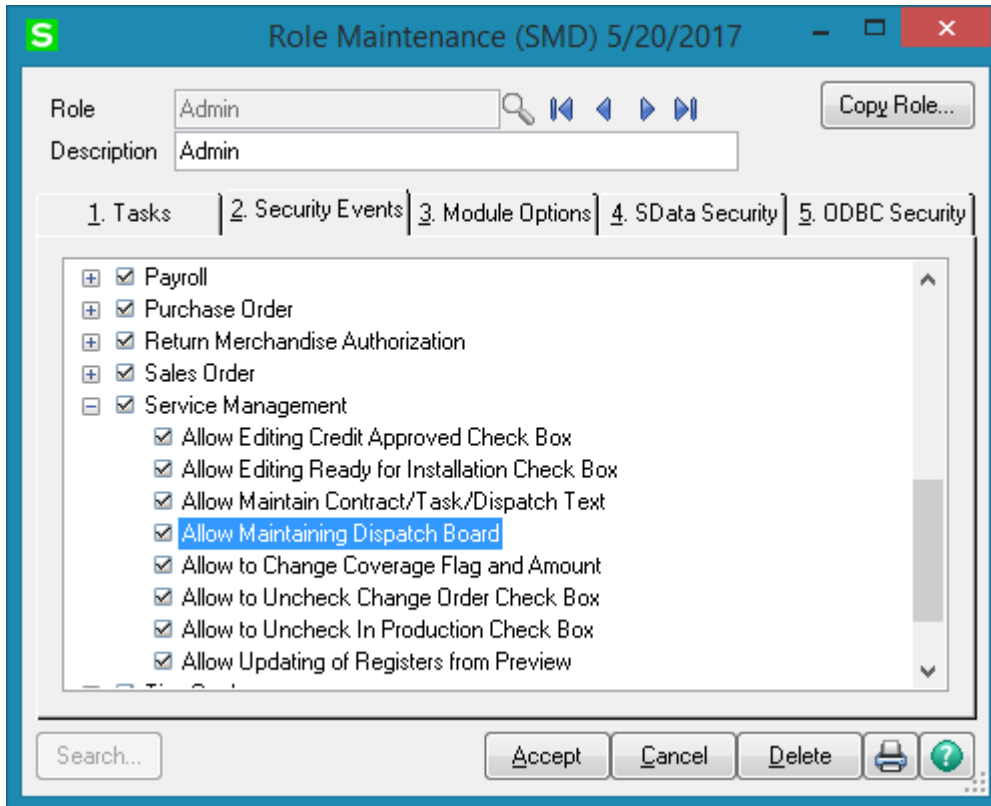
Dispatch Board

In order to have the Dispatch Board working integrated with Map Point/ Map Quest it is necessary to purchase also the SMM (Map Point for SMP)/SMQ (Map Quest for SMP) enhancements.

Dispatch Board works also integrated with Google Map API. Refer to [How to Get a Standard Google Map API Key](#) section for details.

Role Maintenance

The **Allow Maintaining Dispatch Board** security event has been added in the Role Maintenance to allow or restrict full access to dispatch Board:

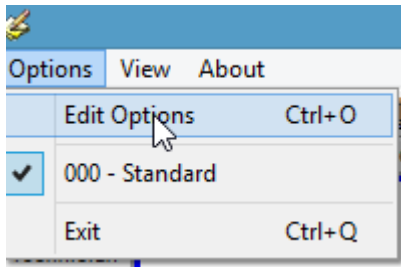


If the **Allow Maintaining Dispatch Board** checkbox is selected for a Role assigned to user, the user can create new Dispatch Board view, new Task/Dispatch, open and modify the Task/Dispatch, change status; otherwise the user can access the Dispatch Board only in the inquiry mode.

Dispatch Board Views

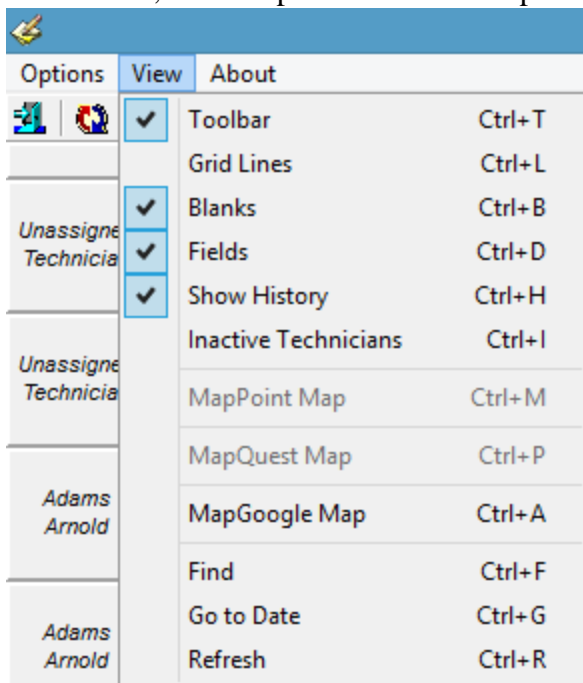
The **Dispatch Board** displays tasks in cells with task dates and technicians placed vertically on the board or horizontally across the top of the board.

The **main menu** located in the upper left corner of the Dispatch Board screen, contains the following submenus.



In the **Options** menu, you can select an existing **Options Type**, and **Edit Options** in the **Options for User** dialog box (described later). Current Options Type is indicated with a checkmark.

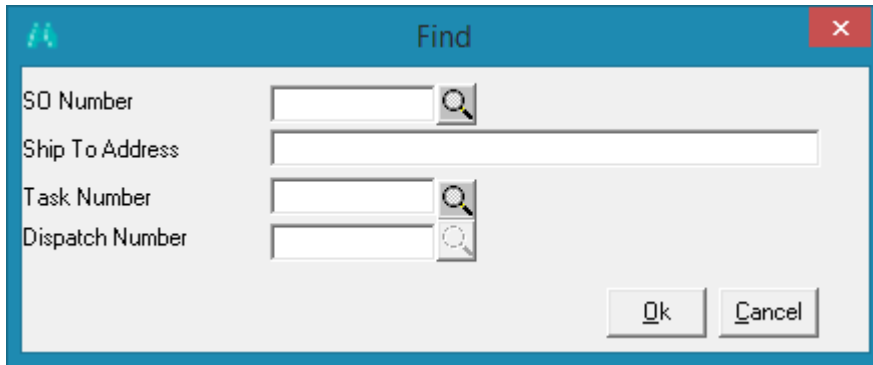
In the **View** menu, you can select to Show/Hide **Toolbar**, **Grid Lines**, **Fields**, **Blanks** (blank rows and columns), **Show History**, **Inactive Technicians**, **Refresh** the Dispatch Board view, **Find** a specific Task or Dispatch and go to the preferred date on the Board.



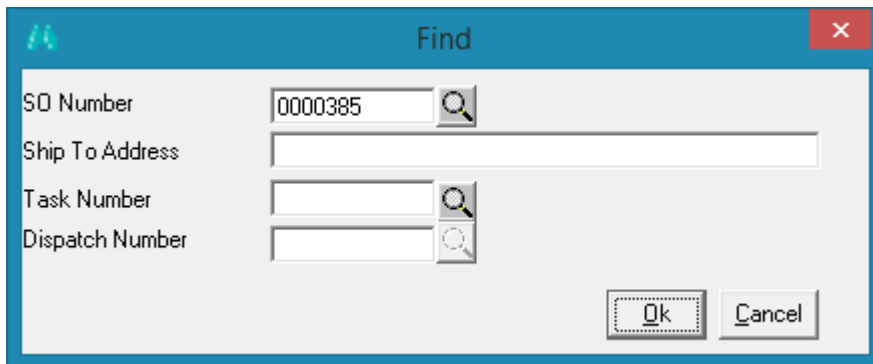
The **Toolbar** enables you to quickly **Exit** the Dispatch Board, **Refresh** the view, **Edit Options**, select **Options Type**, **Show/Hide Grid Lines**, **Blanks**, **Fields**, **Show/Hide History**, **Inactive Technicians**, **Find** Task/Dispatch.



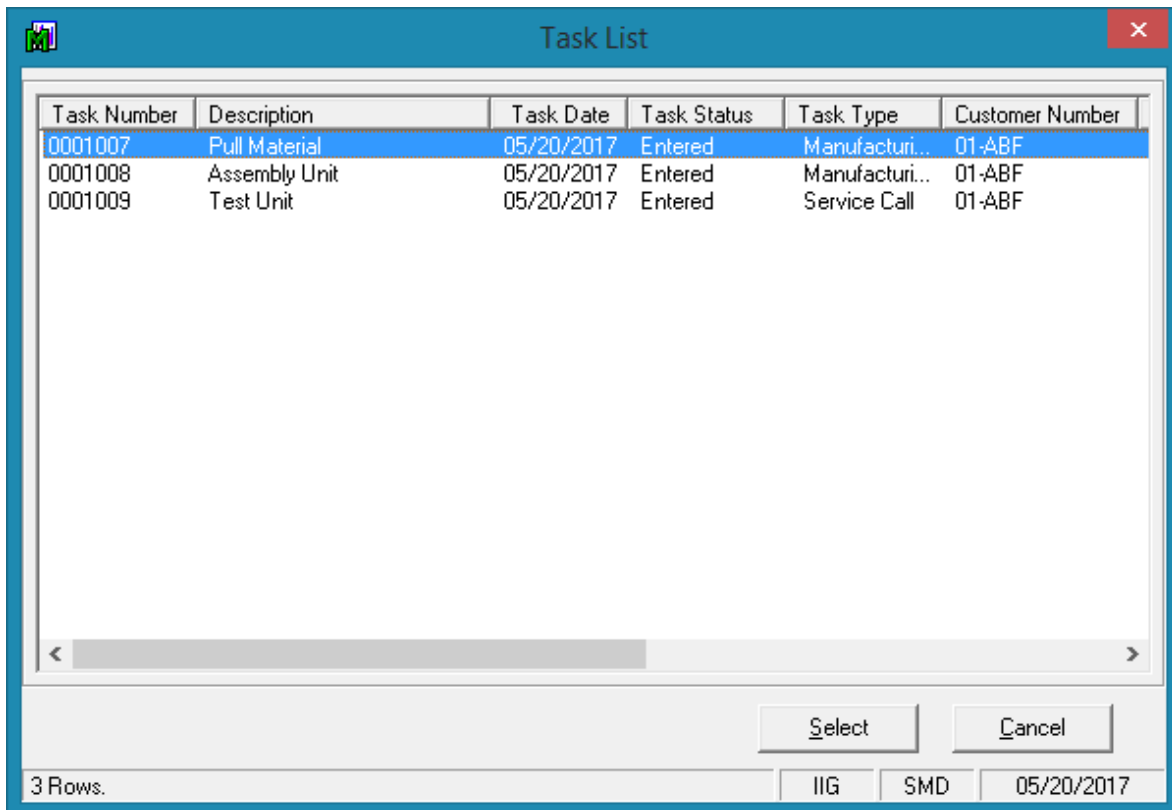
Find allows searching a specific task/dispatch on the Board. When a task has dispatches you will be prompted to enter also the dispatch number. A Task Number cannot be found and displayed when it doesn't exist or options should be changed in order to display it.



A dialog box titled "Find" with a blue header bar and a red close button. It contains four input fields: "SO Number", "Ship To Address", "Task Number", and "Dispatch Number". Each field has a magnifying glass icon to its right. At the bottom right are "Ok" and "Cancel" buttons.



The same "Find" dialog box, but the "SO Number" field is now filled with the text "0000385".

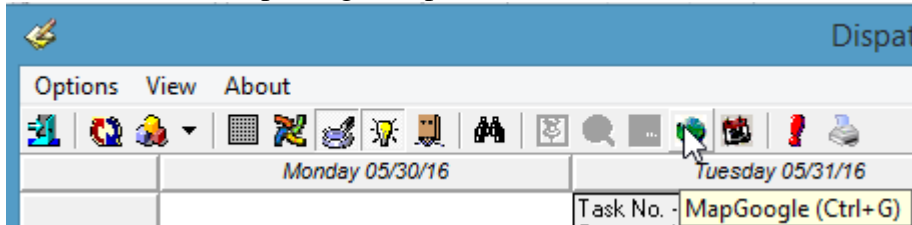


A window titled "Task List" with a blue header bar and a red close button. It displays a table of tasks. The table has six columns: Task Number, Description, Task Date, Task Status, Task Type, and Customer Number. There are three rows of data. Below the table is a horizontal scrollbar. At the bottom right are "Select" and "Cancel" buttons. At the bottom left, it says "3 Rows." At the bottom right, there are three small buttons labeled "IIG", "SMD", and "05/20/2017".

Task Number	Description	Task Date	Task Status	Task Type	Customer Number
0001007	Pull Material	05/20/2017	Entered	Manufacturi...	01-ABF
0001008	Assembly Unit	05/20/2017	Entered	Manufacturi...	01-ABF
0001009	Test Unit	05/20/2017	Entered	Service Call	01-ABF

The **Go To** button allows the user to easily locate the cell with respective date on the board. Upon clicking **Go To** button the calendar is opened with the dispatch board view starting date selected. A message will prompt the user to check the options in case the selected Go To date falls out of the View Date Range specified in the Board Options.

The **MapGoogle** button opens the Map-Dispatch Board allowing the user to see the Task addresses on the map and get respective directions.



The **MapPoint** and **Map Quest** buttons are available only if the SMM (Map Point for SMP) and SMQ (Map Quest for SMP) enhancements are installed and enabled in the Dispatch Board Options:

Map Point and **Map Quest** checkboxes are enabled on the **Maps** tab of the Dispatch Board Options after installing correspondingly SMM and SMQ enhancements. Refer to SMQ.pdf for details about **Map Quest-Dispatch Board**.

The **Print** button allows for running the **Task Dispatch Report** with the Dispatch View starting and ending dates selected as the **Scheduled Date** and **Dispatch Starting Date** ranges and the Technicians displayed on the board loaded as selection range for **Task Technician** and **Dispatch Technician**.

The **Contract Number** field enables filtering of the records loaded in the board by the specified Contract number. If there is a Contract number selected/entered in this field only the Tasks associated with that Contract number will be available on the Board.

User specified information for each task or dispatch is displayed in a cell or span of cells. Each type of data in the cell (e.g., Customer, Task Number, and Contract Number) can be color-coded for easier visibility. Also display names of data fields can be changed (for example, shortened). Color bars for Task/Dispatch Statuses can be displayed in each cell. Displaying the cell in a color different from other dispatches can highlight an Overdue Dispatch. The user can also filter the tasks by requesting only those tasks with data falling in certain ranges.

Task Number	Description	Entry Date/Time	Scheduled Date/Time	Status Color
0001002	Full Material	05/20/2017 15:06	05/22/2017 15:06	Approved
SD Number	Task Type	Task Status	Customer Number	Job Site Code
	Manufacturing	Entered	01-ABF	2
Nature of Task	Pref. Technician	Item Number	Lot/Serial Number	Territory Code
	BRN	BEL2500		ARIZON
Disp. No.	Disp. Date	Technician Code	Dispatch Status	Starting Date/Time
0001	05/20/2017	BRN	Entered	05/20/2017 15:06
				Ending Date/Time
				05/21/2017 15:07
				Dispatch Interval
				24 hours 1 minutes
				Total
				0

To see the details of a Task/Dispatch in the lower part of the screen, click on the cell containing that Task/Dispatch.

You can place technicians or dates horizontally across the top or vertically on the board. Also you can view duplicates of technician codes or dates if several tasks/dispatches have been assigned to the same technician and should be done on the same period of time.

You can also view the duration of each task. The span of the cells displays the Scheduled and Due Date/Time of the Task or the Starting and Ending Date/Time of the Dispatch.

You can change the width of the cells. Click anywhere between the names of Technicians at the top of the board, and drag the mouse to the right to increase the width or to the left to decrease it. The status bar displays the column count. All the columns will have equal widths when you release the mouse. The number of columns will remain unchanged when you resize the window, so you can adjust cell width by resizing window too. Rows will only have whole cells.

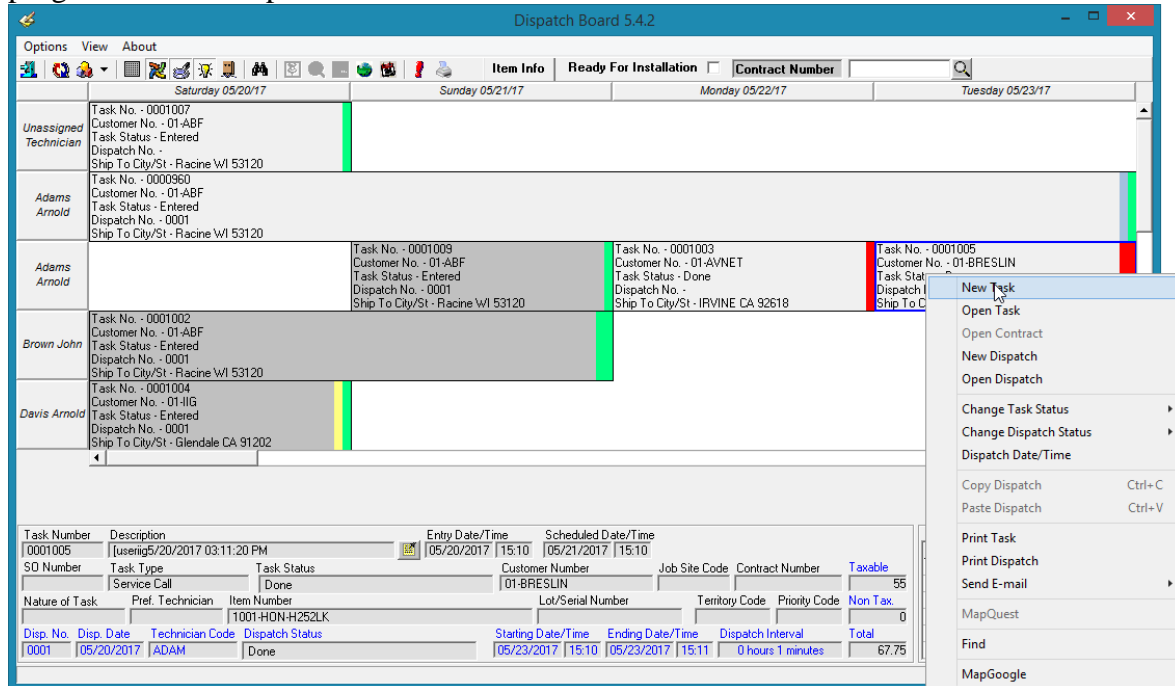
A cell can be dragged to another date or technician, and the system will update the corresponding dispatch. A tool tip displays the destination date and technician name while dragging. The cursor is changed, if the move is not allowed (closed dispatch, moving to the Unassigned Technician column, moving without Date change).

When dragging and dropping Tasks/Dispatches on the Board the Technician on the Dispatch labor line is changed.

Cells can be selected using keyboard Arrows, Page Up, Page Down keys.

Pressing Enter from the keyboard opens the selected task in the **Task Data Entry** screen. Pressing Enter when an empty cell is selected displays the **Task Data Entry** screen ready for new task entry.

Right-clicking on a cell displays popup menu, from which you can quickly run some programs for the dispatch.



New Task- opens the **Task Data Entry** screen ready for new task entry. The **Next Task Number** is selected, the Task Date is populated with current date and the **Scheduled Date/Time** is set equal to the Date/Time of the selected cell. The **Technician** of the selected cell is loaded.

Open Task- opens the Task Data Entry screen for the current task. You can also open the Task Data Entry screen by double clicking on the task cell. If there is a dispatch for current Task pressing the CTRL key and double clicking on the cell will open the **Dispatch Data Entry**.

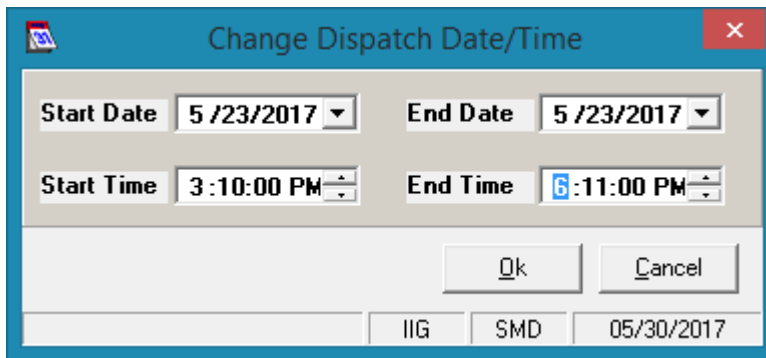
Open Contract – opens the Contract associated with current Task.

New Dispatch- opens the Dispatch Data Entry screen ready for new dispatch entry for current task.

Open Dispatch displays the Dispatch Data Entry screen for the current dispatch. If the Dispatch Status is closed, the Dispatch Inquiry screen is displayed instead.

You can **Change Task/Dispatch Status**. If the program cannot change the status, a message appears explaining the problem. (For example, you cannot close a task that has open dispatches.)

Dispatch Date/Time displays the **Change Dispatch Date/Time** dialog box where you can change starting and ending date and time of the dispatch.



A dialog box titled "Change Dispatch Date/Time" with a close button (X) in the top right corner. It contains four input fields: "Start Date" (5/23/2017), "End Date" (5/23/2017), "Start Time" (3:10:00 PM), and "End Time" (6:11:00 PM). Below these fields are "Ok" and "Cancel" buttons. At the bottom, there are three small text boxes containing "IIG", "SMD", and "05/30/2017".

Print Task and **Print Dispatch** commands run respectively the Task and Dispatch Crystal Report Printings.

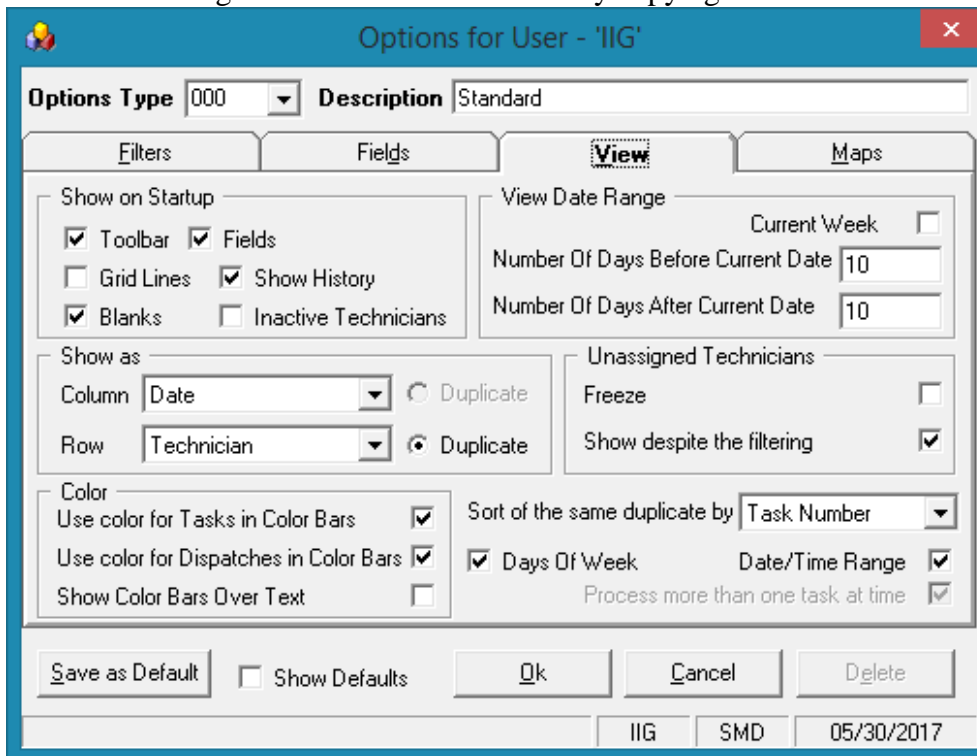
Send E-mail allows sending emails to Technician, Customer, or Both.

The **Dispatch Board** is automatically refreshed when Accepting changes in the Task and Dispatch Data Entries, closing tasks, creating new tasks and dispatches.

To control which data fields appear in the cells (and their colors), select the **Edit Options** submenu from the **Options** menu.

Dispatch Board Default View

The "**Save as default**" button on the Dispatch Board options screen allows saving default view and creating new views for other users by copying from the Default View.



A dialog box titled "Options for User - 'IIG'" with a close button (X) in the top right corner. It has a tabbed interface with four tabs: "Filters", "Fields", "View" (selected), and "Maps". The "View" tab contains several sections:

- Show on Startup**: Checkboxes for "Toolbar" (checked), "Fields" (checked), "Grid Lines" (unchecked), "Show History" (checked), "Blanks" (checked), and "Inactive Technicians" (unchecked).
- View Date Range**: "Current Week" (unchecked), "Number Of Days Before Current Date" (10), and "Number Of Days After Current Date" (10).
- Show as**: "Column" (Date), "Row" (Technician), and "Duplicate" (radio buttons for "Duplicate" and "Duplicate" are both selected).
- Color**: Checkboxes for "Use color for Tasks in Color Bars" (checked), "Use color for Dispatches in Color Bars" (checked), and "Show Color Bars Over Text" (unchecked).
- Unassigned Technicians**: "Freeze" (unchecked) and "Show despite the filtering" (checked).
- Sort of the same duplicate by**: Task Number (selected).
- Days Of Week**: Checkboxes for "Days Of Week" (checked), "Date/Time Range" (checked), and "Process more than one task at time" (checked).

 At the bottom are buttons for "Save as Default", "Show Defaults", "Ok", "Cancel", and "Delete". At the very bottom, there are three small text boxes containing "IIG", "SMD", and "05/30/2017".

For the newly added Options Type the **Save as Default** button is disabled until the record is created (OK is pressed).

Options for User - 'IIG'

Options Type: **GHS** Description: **Copy from Standard**

Filters Fields View Maps

Field Name: **Date** All Starting Ending

☐ Date ☐ 01/01/1900 ☐ 12/31/2099

Fields	Starting	Ending
<input type="checkbox"/> Date	01/01/1900	12/31/2099
<input checked="" type="checkbox"/> Technician Number		ZZZ
<input checked="" type="checkbox"/> Task Number		ZZZZ
<input type="checkbox"/> Division - Customer Number 00-		99-ZZZZ
<input checked="" type="checkbox"/> Task Status		Z
<input checked="" type="checkbox"/> Task Type		Z
<input checked="" type="checkbox"/> Task Priority		Z

☐ Show Unchecked Lines Only

Save as Default ☒ Show Defaults **Ok** **Cancel** **Delete**

IIG SMD 05/30/2017

Select the **Show Defaults** checkbox to see only the Options Types saved as default. Default views are marked with “*”.

When new **Options Type** (new View) is created all settings are automatically copied from the current one.

On the **Filters** tab, you may request to see only those task/dispatches meeting certain criteria.

Click the **Technician Number** line to set a range of technicians (or just one technician),

Options for User - 'IIG'

Options Type: 000 Description: Standard

Filters | Fields | View | Maps

Field Name: All Starting Ending

Technician Number ☐ ADAM ☐ NEW

Fields	Starting	Ending
<input type="checkbox"/> Date	03/01/2015	12/31/2019
<input type="checkbox"/> Technician Number	ADAM	NEW
<input checked="" type="checkbox"/> Task Number		////
<input type="checkbox"/> Division - Customer Number	00-	99-////
<input checked="" type="checkbox"/> Task Status		Z
<input checked="" type="checkbox"/> Task Type		Z
<input checked="" type="checkbox"/> Task Priority		7

☐ Show Unchecked Lines Only

☐ Show Defaults

IIG SMD 05/30/2017

Enter the Starting and Ending **Technician Numbers** and click the **Save Change** icon to the right.

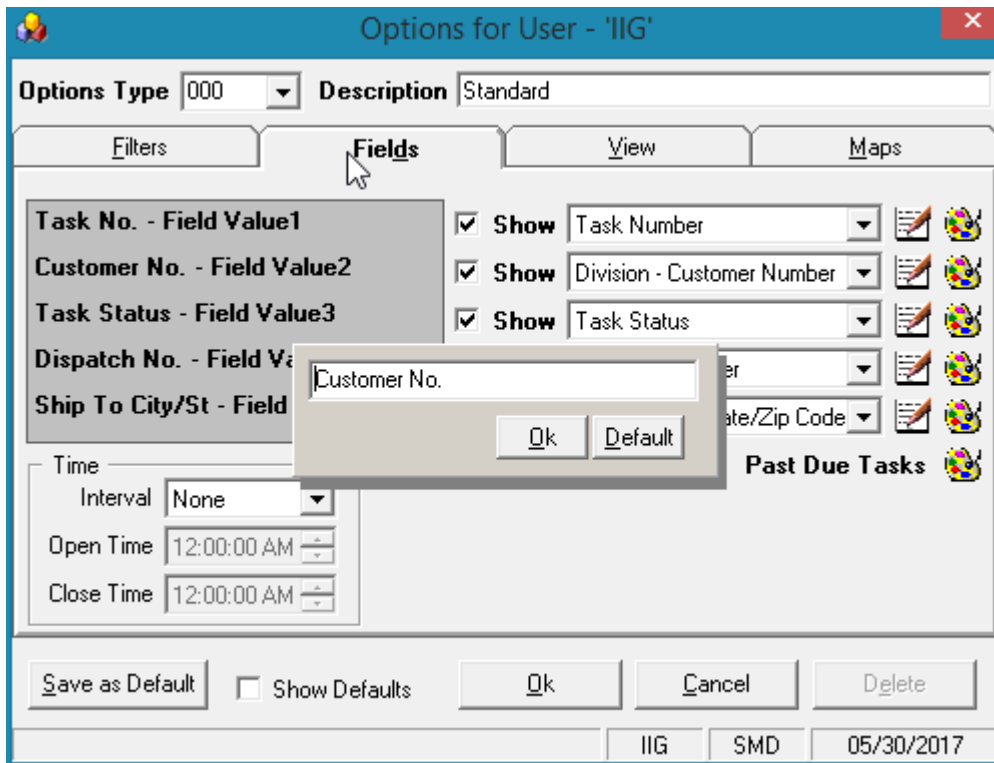
To undo the range selection, place a check in the box to the left of the field name. This checkbox means that all possible values of the field will be displayed on the board.

Repeat the process to select a range of data for any other fields you may wish to limit. Use the **OK** button when you are done.

Check the **Show Unchecked Lines Only** box to display only the lines with limitations of range.

Dispatch Board- Fields

Click the **Fields** tab in the displayed **Options for User** dialog box.



You can choose five data fields to be displayed in the cells of the board. Select fields from the drop-down lists, and see preview on the left.

You can hide fields if you do not need all five fields displayed. Uncheck the boxes next to fields that you do not want to be displayed.

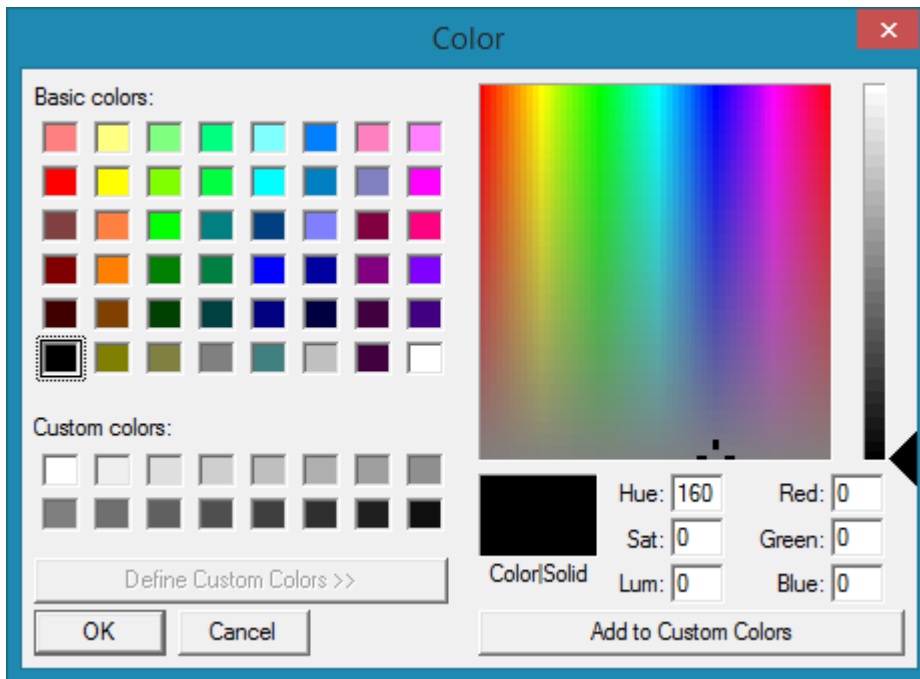
Besides, you can change the display name of selected fields. Click the **Edit** button. An edit box is displayed, where you can type a shorter or more convenient name for the field. (You can even delete the name at all, if you have highlighted the field with color or simply remember which one it is.)

Click the **Default** button to reset the name to the default.

Click **OK** to save the new display name.

To change the color of a field, click its **Color** button.

Select color in the standard Windows **Color** dialog box.



You can select a background color for **Past Due Tasks** cells. The cells representing dispatches with Ending Date earlier than current system date will be displayed with that color.

In the **Time** section you can enter the **Open Time** and **Close Time** and specify the Time Interval of tasks/dispatches. When no time interval is selected (**None** is selected in the **Interval** field), Open Time and Close Time fields will be disabled (tasks on the board will be shown only by Dates).

Go to the **View** tab.

Check the corresponding boxes in the **Show on Startup** section to show **Toolbar, Grid Lines, Fields, Blanks, History and Inactive Technicians** each time the Dispatch Board starts.

The **Show History** option enables displaying **Closed** tasks (with their dispatches) on the Dispatch Board.

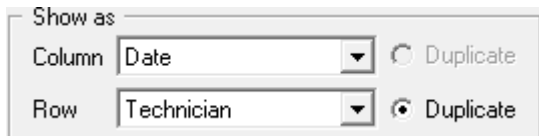
Note: It is necessary to have the Retain Task Entry History option turned on in the SM Options in order to have the Closed tasks displayed on the Board.

The cells with closed tasks are viewed only; they cannot be changed or moved. The **Open Task, Open Dispatch** and **Print Task** commands from the drop-down menu will open correspondingly the **Task History Inquiry, Dispatch Inquiry** and the **Task History Printing** screens.

You can set the **Numbers Of Days Before and After Current Date**. This can be useful to locate tasks and dispatches more easily and also to shorten refresh time of the Board. If both are set to 0, all the Dates are displayed.

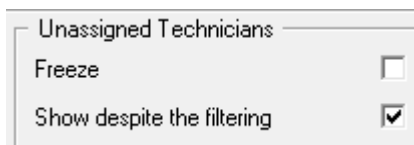
The **Current Week** checkbox is intended for displaying only the data of current week. If this checkbox is selected the display is from Sunday to Saturday of the current week based on the system date.

You can form the Board based on the **Show as Column** and **Show as Row** fields.



Select what should be displayed on the top across the board (for instance, it can be technician or dates), and what should be displayed vertically. Select the **Duplicate** checkbox if you want to see duplicated columns or rows (in case the same tasks are assigned to the same technician and should be done on the same period of time).

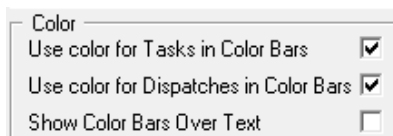
The **Unassigned Technicians** section is intended for displaying/hiding unassigned Technicians on the Dispatch Board.



The **Freeze** option allows freezing the **Unassigned Technician** row/column. If there is more than one **Unassigned Technician** row/column only the first one will be frozen.

The **Show despite the filtering** checkbox provides an option of displaying the **Unassigned Technician** row/column on the Board regardless the filtering applied to the **Technician Number** field.

Check the **Use color for Tasks and Dispatches in Color Bars** boxes to display the color bars with the colors corresponding to the tasks and dispatches statuses.



Check the **Show Color Bars Over Text** box to display the color bars over the text in cells, to view the colors more clearly.

Dispatch Board 5.4.2

Options View About

Item Info Ready For Installation Contract Number

05/20/17 05/21/17 05/22/17 05/23/17 05/24/17

Unassigned Technician

Task No. - 0001007
Customer No. - 01-ABF
Task Status - Entered
Dispatch No. -
Ship To City/St - Racine WI 53120

Adams Arnold

Task No. - 0000960
Customer No. - 01-ABF
Task Status - Entered
Dispatch No. - 0001
Ship To City/St - Racine WI 53120

Adams Arnold

Task No. - 0001009
Customer No. - 01-ABF
Task Status - Entered
Dispatch No. - 0001
Ship To City/St - Racine WI 53120

Task No. - 0001003
Customer No. - 01-AVNET
Task Status - Done
Dispatch No. -
Ship To City/St - IRVINE CA 92618

Task No. - 0001005
Customer No. - 01-BRESLIN
Task Status - Done
Dispatch No. - 0001
Ship To City/St - Molalla WI 53266

Task Number	Description	Entry Date/Time	Scheduled Date/Time	Status Color
0000960	Test Unit	07/22/2016 17:49	07/22/2016 17:49	Approved
SO Number	Task Type	Task Status	Customer Number	Job Site Code
	Service Call	Entered	01-ABF	2
Nature of Task	Pref. Technician	Item Number	Lot/Serial Number	Territory Code
	ADAM	BEL2500		ARIZON
Disp. No.	Disp. Date	Technician Code	Dispatch Status	Starting Date/Time
0001	07/22/2016	ADAM	Closed	07/22/2016 17:49
				Ending Date/Time
				07/22/2017 18:10
				Dispatch Interval
				8760 hours 21 minutes
				Total
				84
				Late / Conflict

IIG SMD 05/30/2017

Changing the status of the task/dispatch will change also the colors.

If you want to view the span of the cells, select the **Date/Time Range** checkbox. When this checkbox is selected, the **Duplicate** checkbox will be disabled for **Show Row/Column as Date** case.

Sort of the same duplicate by Task Number

☒ Days Of Week Date/Time Range ☒

Process more than one task at time ☒

In the **Sort of the same duplicate by** field select the field (Task Number, Priority Code, Scheduled or Start Time, Scheduled Time, Dispatch Start Time) based on which sorting within the same duplicates (for instance, Technicians or Dates) should be done. But in some cases, in order to avoid using extra spaces on the board, the sorting order may be contravened by inserting the tasks/dispatches (or span of tasks/ dispatches) in fitting free spaces.

Select the **Days of Week** checkbox to have the day of the week shown on the Dispatch Board Date column.

Dispatch Board 5.4.2

Options View About

Item Info Ready For Installation Contract Number

	Saturday 05/20/17	Sunday 05/21/17	Monday 05/22/17	Tuesday 05/23/17	Wednesday 05/24/17
Unassigned Technician	Task No. - 0001007 Customer No. - 01-ABF Task Status - Entered Dispatch No. - Ship To City/St - Racine WI 53120				
Adams Arnold	Task No. - 0000960 Customer No. - 01-ABF Task Status - Entered Dispatch No. - 0001 Ship To City/St - Racine WI 53120				
Adams Arnold		Task No. - 0001009 Customer No. - 01-ABF Task Status - Entered Dispatch No. - 0001 Ship To City/St - Racine WI 53120	Task No. - 0001003 Customer No. - 01-AVNET Task Status - Done Dispatch No. - Ship To City/St - IRVINE CA 92618	Task No. - 0001005 Customer No. - 01-BRESLIN Task Status - Done Dispatch No. - 0001 Ship To City/St - Molalla WI 53266	

Task Number	Description	Entry Date/Time	Scheduled Date/Time	Status Color
0000960	Test Unit	07/22/2016 17:49	07/22/2016 17:49	
SD Number	Task Type	Task Status	Customer Number	Job Site Code
	Service Call	Entered	01-ABF	2
Nature of Task	Pref. Technician	Item Number	Lot/Serial Number	Territory Code
	ADAM	BEL2500		ARIZON
Disp. No.	Disp. Date	Technician Code	Dispatch Status	Starting Date/Time
0001	07/22/2016	ADAM	Closed	07/22/2016 17:49
				Ending Date/Time
				07/22/2017 18:10
				Dispatch Interval
				8760 hours 21 minutes
				Total
				84
				Non Tax
				84
				Approved
				Closed
				Done
				Entered
				Hold A/R
				Late / Conflict

IIG SMD 05/30/2017

The user can change the **Task Scheduled /Dispatch Starting** and **Task Due/ Dispatch Ending Dates/Times** by changing the size of the cell on the **Dispatch Board**. No need to change the date/time of the Task/Dispatch from the Task/Dispatch Data Entry when a technician is required to stay an extra day or has completed the task earlier. Click on the starting/ending edge of the cell and move the cursor to the desired Date Time. Cell resizing is available only if the **Date/Time Range** checkbox is selected and for the cells with active Tasks and Dispatches.

Dispatch Board 5.4.2

Options View About

Item Info Ready For Installation Contract Number

	Saturday 05/20/17	Sunday 05/21/17	Monday 05/22/17	Tuesday 05/23/17	Wednesday 05/24/17
Unassigned Technician	Task No. - 0001007 Customer No. - 01-ABF Task Status - Entered Dispatch No. - Ship To City/St - Racine WI 53120				
Adams Arnold	Task No. - 0000960 Customer No. - 01-ABF Task Status - Entered Dispatch No. - 0001 Ship To City/St - Racine WI 53120				
Adams Arnold		Task No. - 0001009 Customer No. - 01-ABF Task Status - Entered Dispatch No. - 0001 Ship To City/St - Racine WI 53120	Task No. - 0001003 Customer No. - 01-AVNET Task Status - Done Dispatch No. - Ship To City/St - IRVINE CA 92618	Task No. - 0001005 Customer No. - 01-BRESLIN Task Status - Done Dispatch No. - 0001 Ship To City/St - Molalla WI 53266	

Task Number	Description	Entry Date/Time	Scheduled Date/Time	Status Color
0001007	Pull Material	05/20/2017 15:50	05/20/2017 15:50	
SD Number	Task Type	Task Status	Customer Number	Job Site Code
	Manufacturing	Entered	01-ABF	2
Nature of Task	Pref. Technician	Item Number	Lot/Serial Number	Territory Code
		BEL2500		ARIZON
Disp. No.	Disp. Date	Technician Code	Dispatch Status	Starting Date/Time
				05/20/2017 15:50
				Ending Date/Time
				05/20/2017 15:50
				Dispatch Interval
				Total
				Non Tax
				Approved
				Closed
				Done
				Entered
				Hold A/R
				Late / Conflict

IIG SMD 05/30/2017

The **Status Color** grid in the lower right hand corner next to the Task/Dispatch data displays the colors specified for corresponding Task/Dispatch statuses. Press the Item Info button to have the Task's Item information loaded in the Item Info list box next to the Status Color grid.

Status Color						
	Task	Dispatch		Item Number	Task	Dispatch
Approved	NO USE	NO USE		BEL2500	USE	USE
Closed						
Done						
Entered						
Hold A/R						
Late / Conflict						

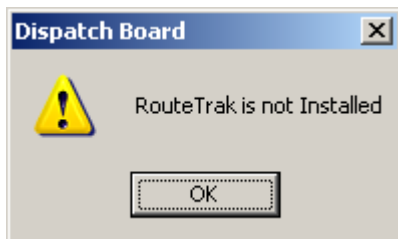
By default, the displayed fields, names, ranges and colors are saved for each user and each company separately under Options Type 000 Standard. You can create different views. Enter new **Options Type** and **Description**. Make your changes, and click **OK**. The view will be saved under current Options Type. Next time opening the dialog box you can select any of existing Options Types.

Map Point-Dispatch Board

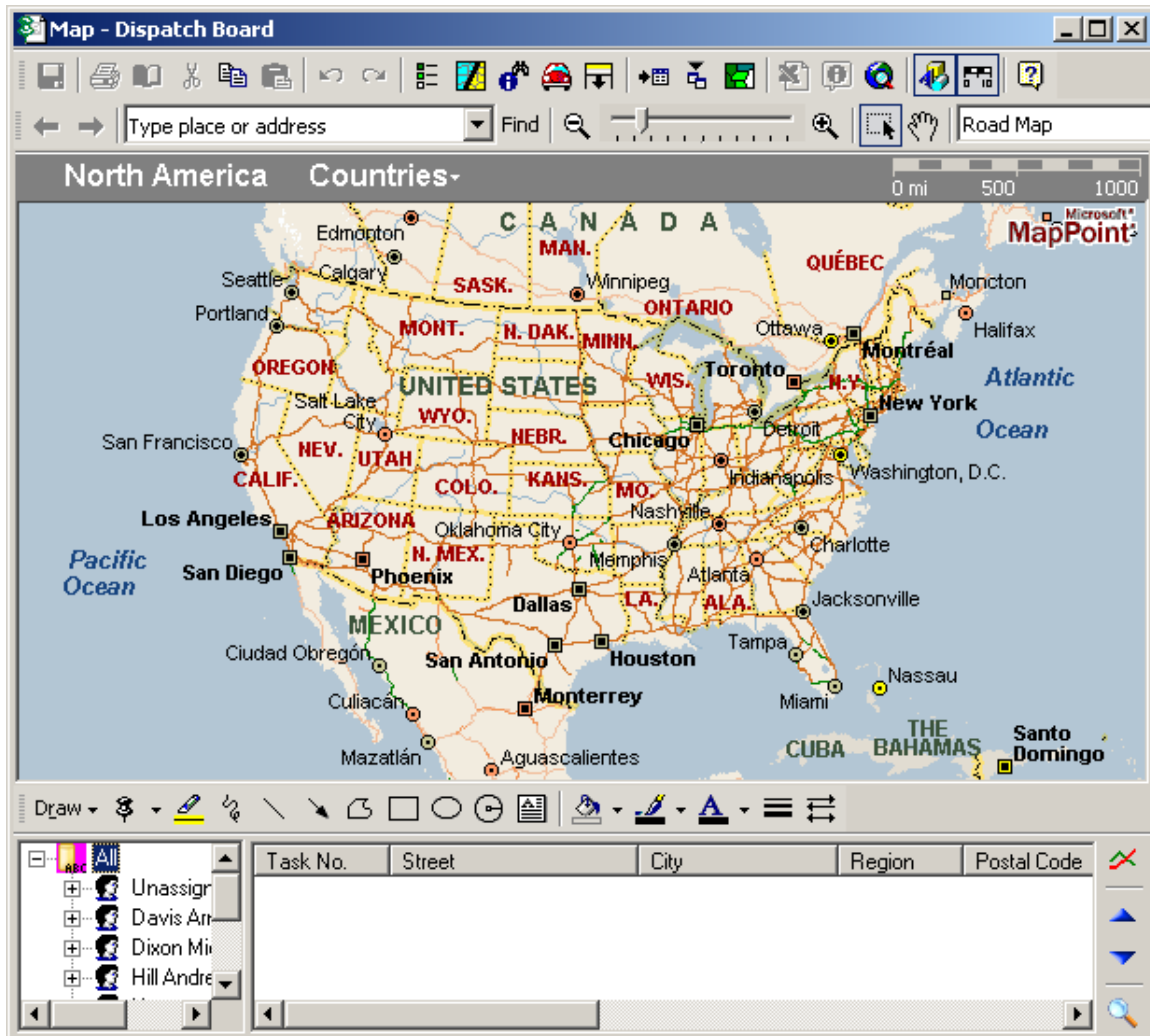
Note: In order to enable the Map Point button on the toolbar program, it is necessary to have IIG's SMM2017(Map Point for SMP) enhancement installed and enabled in the Dispatch Board Options.

It is necessary also to have the RouteTrack program installed, since vehicle and truck information set for each technician is taken from RouteTrack program database.

When trying to open the **Map-Dispatch Board** program without having installed RouteTrack program the following message is displayed:



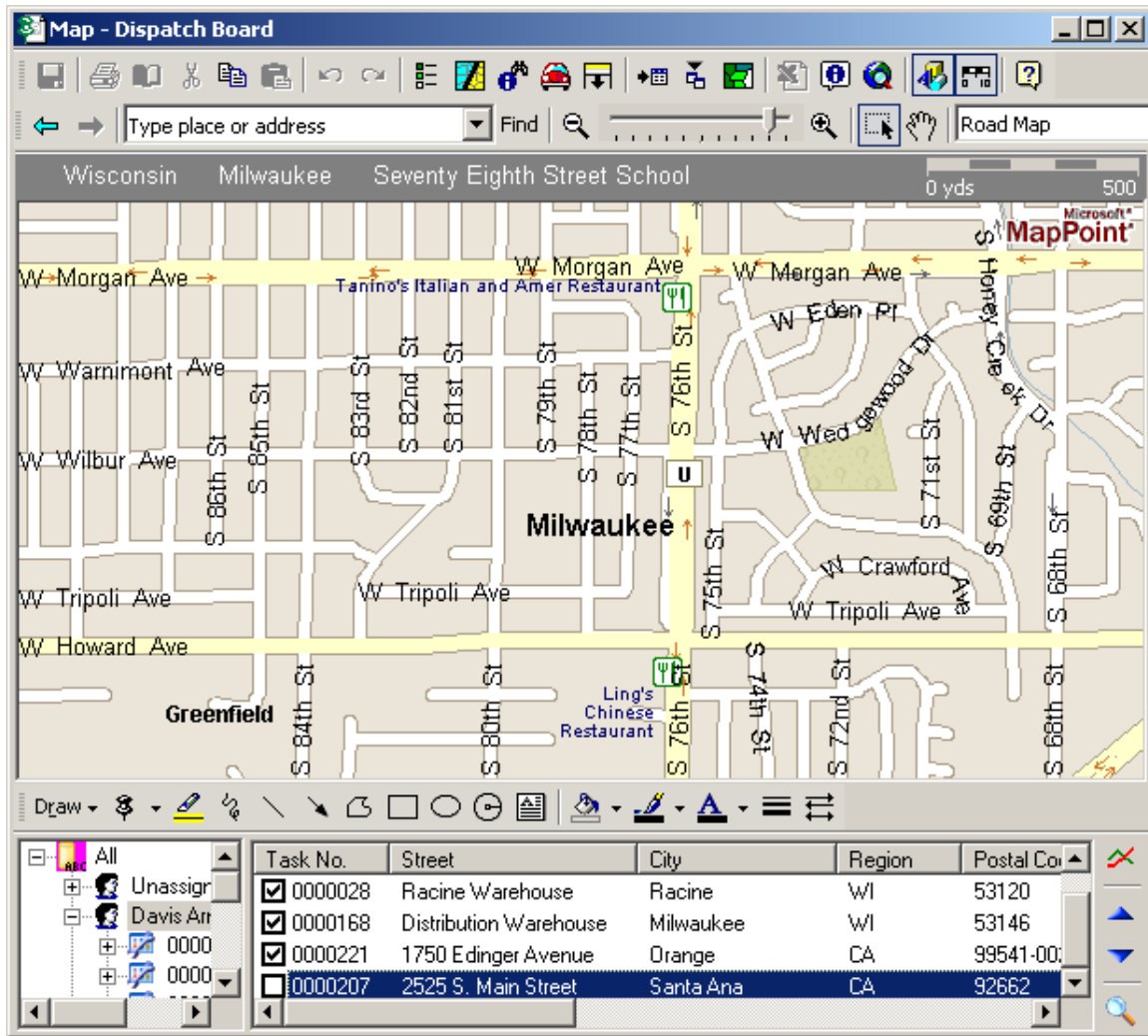
In the opened **Map-Dispatch Board**, at the bottom of the window, the tree-control on the left lists the **Technicians** displayed in the Board.



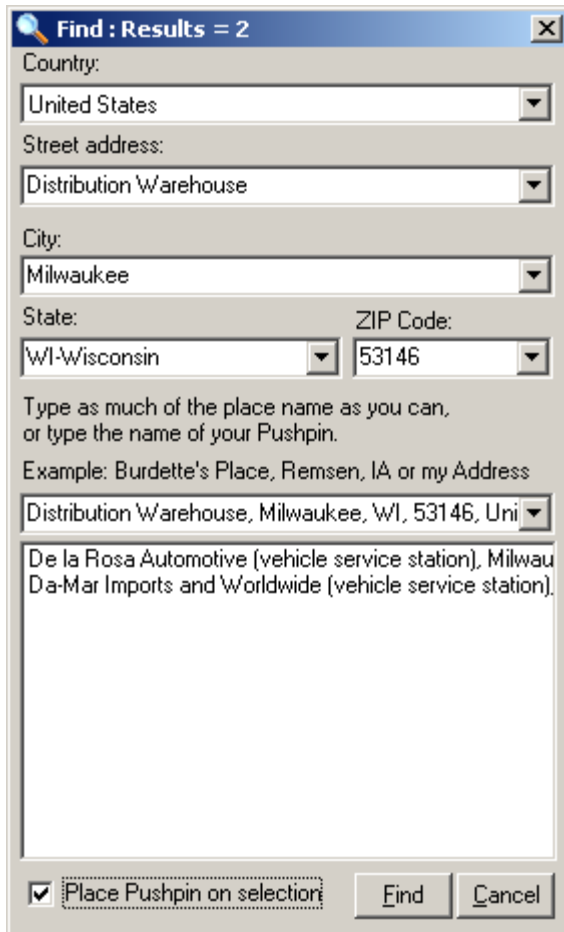
When clicking a **Technician**, Tasks assigned to that technician are displayed on the right (as it is on the Board):



If the program cannot find the place on the map, the checkmark is removed from that row:



The **Find** button opens the **Find** window:

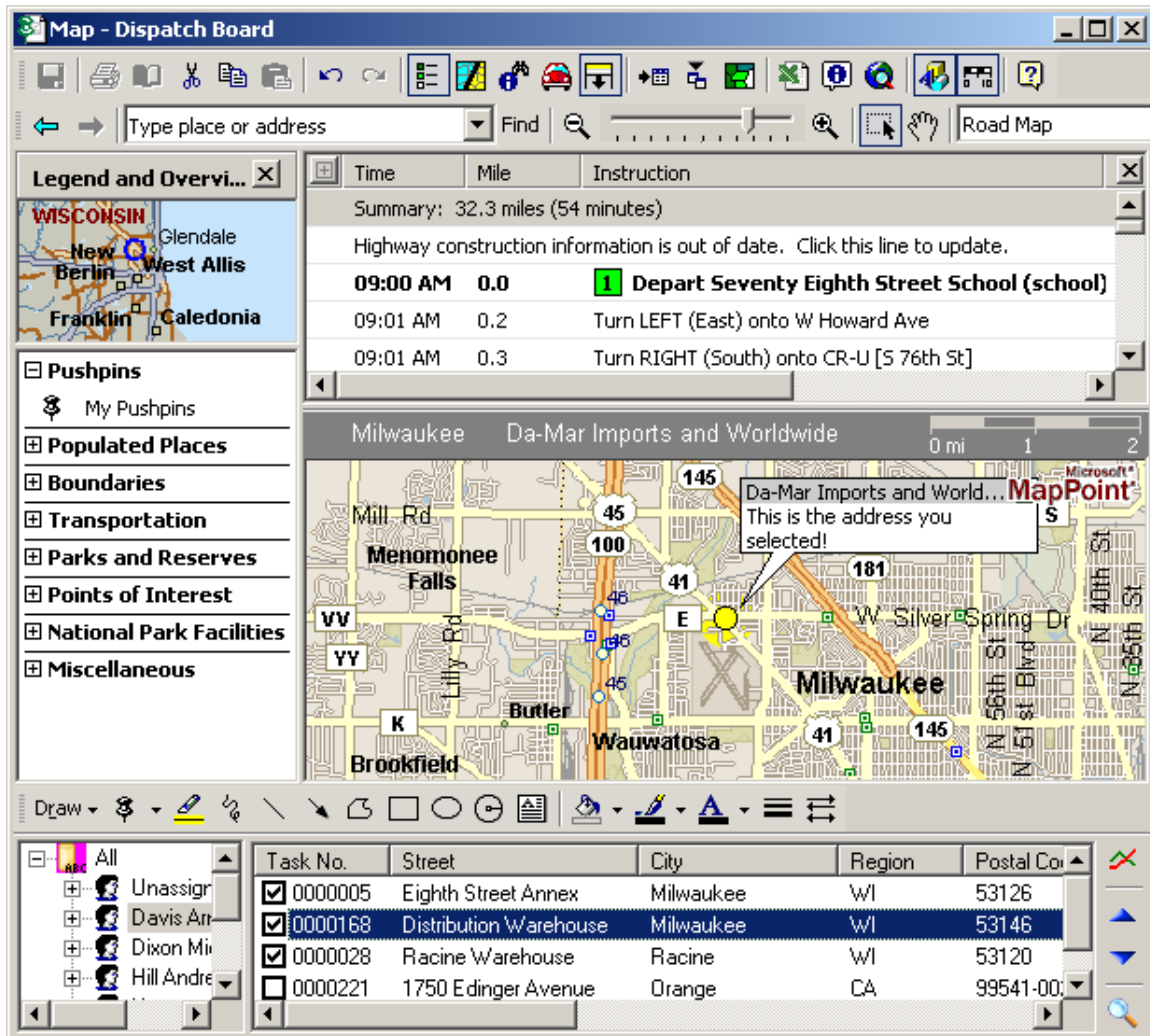


The screenshot shows a window titled "Find : Results = 2". It contains several input fields for search criteria: "Country" (United States), "Street address" (Distribution Warehouse), "City" (Milwaukee), "State" (WI-Wisconsin), and "ZIP Code" (53146). Below these fields is a text box with the instruction "Type as much of the place name as you can, or type the name of your Pushpin." and an example: "Burdette's Place, Remsen, IA or my Address". A text box below this contains the partial address "Distribution Warehouse, Milwaukee, WI, 53146, Uni". Below the text box is a list of results: "De la Rosa Automotive (vehicle service station), Milwau" and "Da-Mar Imports and Worldwide (vehicle service station)". At the bottom, there is a checkbox labeled "Place Pushpin on selection" which is checked, and two buttons labeled "Find" and "Cancel".

This window is always on-top.

If a **Task** is selected in the **Map** window, the address is automatically loaded in the **Find** window.

The **Place Pushpin on selection** box can be checked to place a Pushpin for the selected place.



The **Route Track** button launches the Route Track program.

How to Get a Standard Google Map API Key

1. Go to <https://developers.google.com/maps/documentation/javascript/get-api-key> website
2. Scroll down the page and press Get a Key button and enter your google credentials

Or alternatively, follow these steps to get an API key:

1. Go to the Google API Console.

2. Create or select a project.
3. Click **Continue** to enable the API and any related services.
4. On the **Credentials** page, get an **API key** (and set the API key restrictions).
Note: If you have an existing unrestricted API key, or a key with browser restrictions, you may use that key.
5. To prevent quota theft, [secure your API key following these best practices](#).
6. (Optional) Enable billing. See [Usage Limits](#) for more information.

The Google Maps JavaScript API has the following limits in place: Free until exceeding 25,000 map loads per 24 hours

Note: If billing is enabled after exceeding the free usage limits, billing at \$0.50 USD / 1000 additional requests, up to 100,000 per 24 hours.

Google Map API

Open the **Service Management Options** from the **Service Management Setup** menu. In the **Map Google App Key** field add your Google Map Api key.

Service Management Options (SMD) 5/20/2017

1. Main | 2. Entry | 3. Line Entry | 4. Additional

Enable Dispatch Board ☒
Enable Dispatch Drag/Drop Feature for Updating Task ☐
Map Google App Key
AIzaSyAyHHID-H5FnEAtDXwTFq0ZGCIwLoK1ZcA

Generated Document Line Hours Rounding
Spent Hours Rounding
Spent Hours Precision in Minutes
Minimum Billed Time

Contract Audit
Contract Changes to Track
Track Additions in Detail ☒

E-Mail Sending
[Template Code](#)

Job Cost Posting
Default Account
J/C Cost Code Segment for Technician Postings

Automatically Increment Steps By
Add Note when Email is Sent ☒
Add Note for Dispatch Status Change ☒

Integrate with Payroll
Include History in Payroll Batch ☒
Payroll Overtime Calculation

Redisplay Source Document After Quick Printing
Task Data Entry ☒

Auto Load
Technician from Task to Dispatches and Labors ☒
Dispatch Starting Date/Time from Scheduled
First Labor Hours from Dispatch Dates/Times ☒
Allow Use of Overtime Calculation for Labor ☒
Apply Dispatch Date/Time to Labor Lines

Select the **Map Google Api** checkbox on the **Maps** tab of Dispatch Board Options . Don't select it if you want the Dispatch Board to work with Google Maps website (Not with Api).

Options for User - 'IIG'

Options Type: 000 Description: Standard

Filters Fields View **Maps**

Map Point ☐

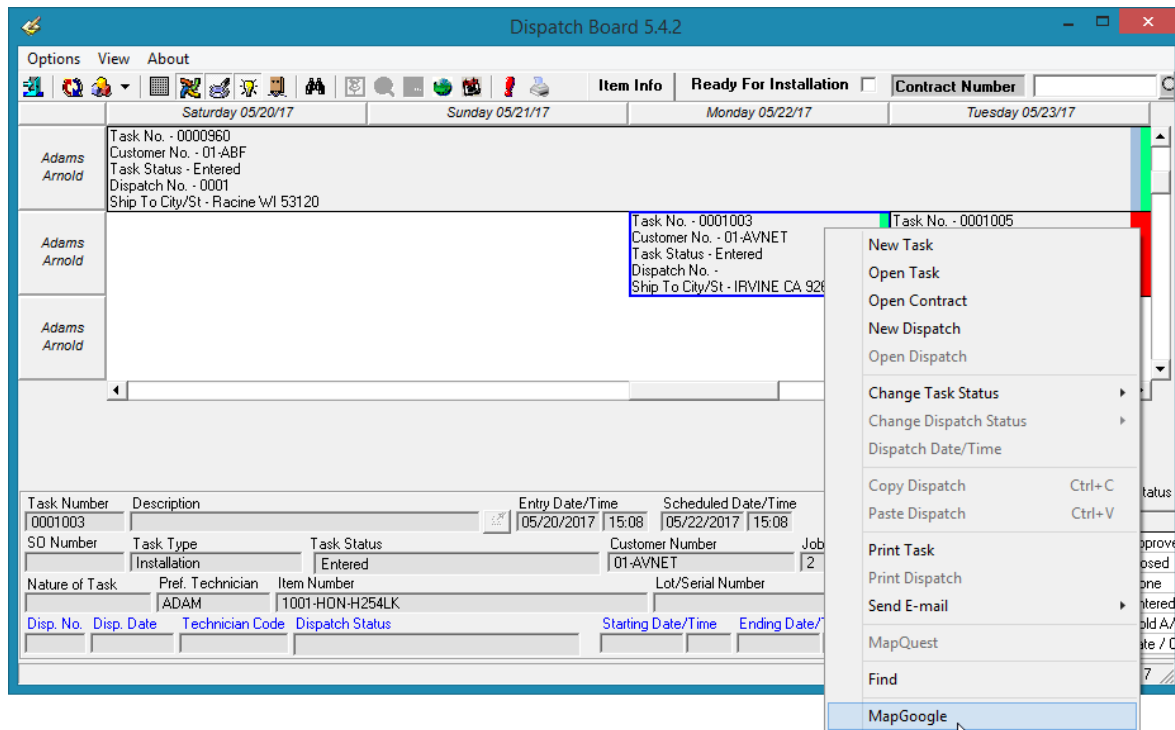
Map Quest ☐

Map Google Api ☒

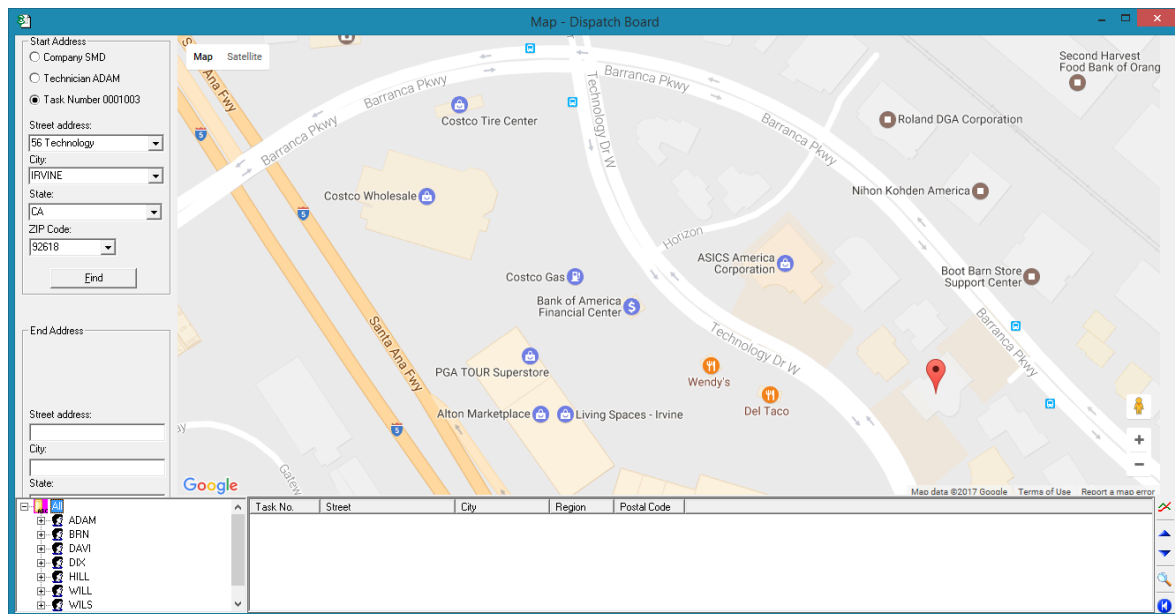
Save as Default ☐ Show Defaults Ok Cancel Delete

IIG SMD 05/20/2017

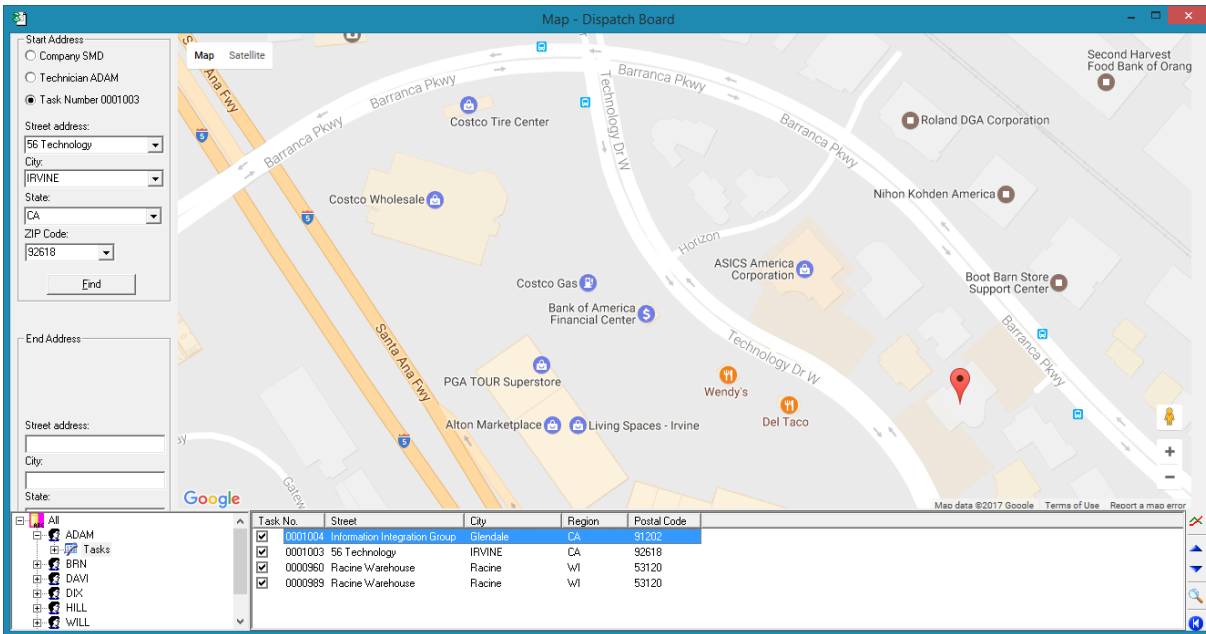
Select **MapGoogle** from the drop down menu to see the Task addresses on the map and get respective directions.



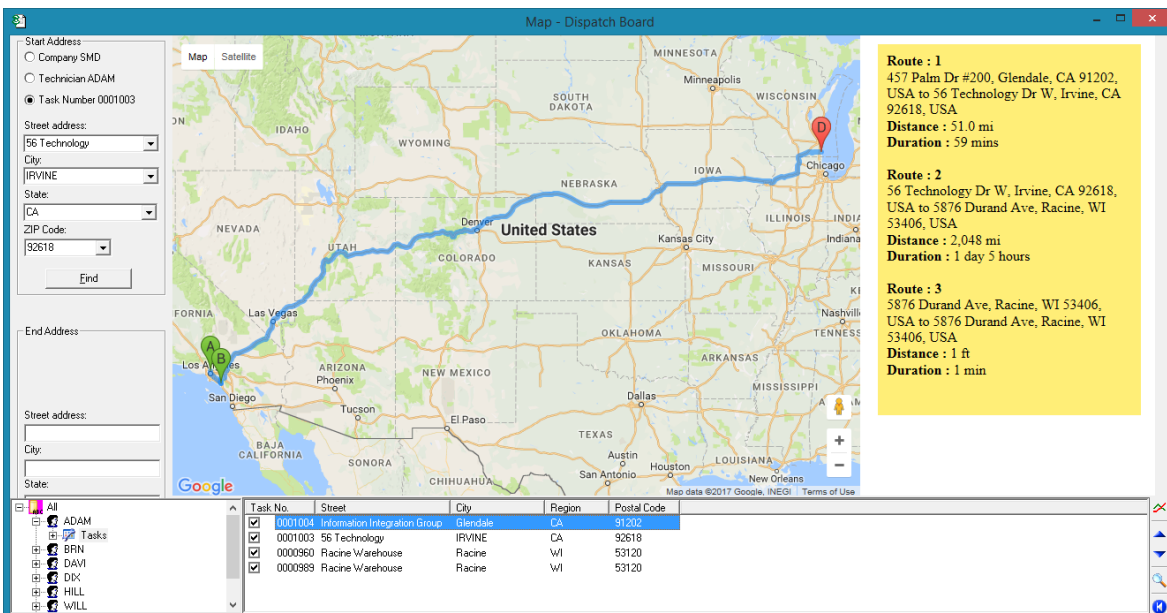
In the opened **Map-Dispatch Board**, at the left bottom of the window, the tree-control lists the **Technicians** displayed in the Board.



When selecting a **Technician**, Tasks assigned to that technician are loaded in the list box on the right.



Select tasks and press the **Calculation** button for route calculation.



The Calculated Distance and Duration of the route are displayed on the right of the map.

Note: The route is calculated for Driving option.

Note: Google Map API works only with IE 10 or higher versions.

Inquiries Menu

Task Inquiry

The **Task Inquiry** program enables viewing the active tasks in a read only mode.

Task Data Inquiry (SMD) 5/30/2017

Task No. 0001009 Test Unit

1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig

Task Date 5/20/2017 Task Time 03:50 PM Task Type S Service Call

Customer No. 01-ABF American Business Futures

Deposit Payment Type NONE Task Total .00 Tax .00

Task Status E Entered Salesperson 0100 Jim Kentley

Contract No.

Job Site Code 2 American Business Futures

Job Site Contact John Quinn

Nature of Task

Preferred Tech.

Preferred Mach.

Item Number BEL2500

Lot/Serial No.

Tax Schedule

Default Misc Item ADAMINSTALL Installation Services

Sales Order No 0000385

Cust PO

Priority Code

Bill Freq Code 1

Route StopNo 0

POS Terminal

Region Arizona

Separate Invoice

Equipment...

Response

Coverage

Quote Amount .00

Scheduled Date 5/20/2017 Time 03:50 PM

Due Date 5/22/2017 Time 03:50 PM

Quote Hours .00 Disp

Documents Path \\GOHAR\d\MAS\MAS2017\SMP\MAS90\Documents\SMD\Tasks\0001009

Quick Print Quick Email Text Message OK

The Address tab displays the Address information and the Dispatches are shown on the Dispatches Tab:

Task Data Inquiry (SMD) 5/30/2017

Task No. 0001009 Test Unit User useriig

1. Header | 2. Address | 3. Dispatches | 4. Payment

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	5/30/2017	ADAM	Adams Arnold	Open

Quick Print Quick Email Text Message OK

Task History Inquiry

The **Task History Inquiry** screen is used to locate and view tasks that have been closed.

Task History Inquiry (SMD) 5/30/2017

Task No. 0000955 Get electrical

1. Header | 2. Address | 3. Dispatches | User useriig

Task Date 7/22/2016 Task Time 05:34 PM Task Type S Service Call

Customer No. 01-ABF American Business Futures

Task Status C Closed Salesperson 0100 Jim Kentley

Contract No. Sales Order No. 0000359

Job Site Code 2 American Business Futures Priority Code

Job Site Contact John Quinn Cust PO

Nature of Task Bill Freq Code 1

Preferred Tech. Close Date 7/22/2016

Preferred Mach.

Item Number BEL2850 Printer Unit

Lot/Serial No. Territory ARIZON Region Arizona

Tax Schedule WI Wisconsin Route

Default Misc Item Separate Invoice ☐

Response Schedule Date 7/22/2016 Time 05:34 PM

Coverage Due Date 7/22/2016 Time 05:34 PM

Quote Amount .00 Quote Hours .00

Quick Print OK

Dispatches tab lists closed Dispatches and allows opening Dispatch Data Inquiry.

S Task History Inquiry (SMD) 5/30/2017

Task No. 0000955 Get electrical

1. Header | 2. Address | 3. Dispatches | User useriig

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	7/22/2016	ADAM	Adams Arnold	Closed

Quick Print

S Dispatch Data Inquiry (SMD) 5/30/2017

Task No. 0000955 Get electrical

Dispatch No. 0001

1. Header | 2. Lines | 3. Payment | User useriig

Quick Row 1

	Item Code	Ordered	Unit Price	Extension	Comment
1	BEL2850	2.00	600.000	1,200.00	
2	4886-18-14-3	2.00	.000	.00	
3	6655	2.00	.000	.00	

Description	Printer Unit
Warehouse	000
Unit Of Measure	EACH
Price Level	1

Total Amount 1,200.00

Labor OK

Contract Inquiry

The **Contract Inquiry** is used to locate and view Contracts in the view only mode:

S Contract Data Inquiry (SMD) 5/30/2017

Contract No. 000000191 NTC NBT Installation of Software Customer... Credit...

1. Header 2. Address 3. Lines 4. Tasks 5. JC History 6. Transactions 7. Unearned

Contract Date 1/25/2017

Customer No. 01-ABF American Business Futures

Contract Type Fixed Hours
Contract Status New
Start Date 1/25/2017
End Date 1/26/2018
Billing Type Time and Material

Job Site Code 2 American Business Futures
Confirm To John Quinn
Comment
Fax No.
E-mail artie@abf.com

Generation
Document None
Contract Amount From Header
Bill Freq Code 1

PM Code
Number of Days 0 Last Task Gen. Date
Task Type
Nature of Task
Total Fixed Hours 100 Used Hours -3:45
Documents Path \\G0HAR\d\MAS\MAS2017\SMP\MAS90\

Tech. ADAM Adams Arnold
All Materials Are Covered
All Labors Are Covered

Route

Total Amount .00

OK

From the **Contract Inquiry Tasks** tab there is an option of drill down to Task/Task History Inquiry.

S Contract Data Inquiry (SMD) 5/30/2017

Contract No. 000000191 NTC NBT Installation of Software Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Active ☒ History ☒ Dispatches ☐ Closed Dispatches ☐

Task No	Task Status	Nature of Task	Pref Tech.	Active/Hist	Scheduled Date
0000964	Entered	PROGRAM	ADAM	Active	2/1/2017
0000965	Entered	PROGRAM	ADAM	Active	2/6/2017
0000967	Entered	PROGRAM	DIX	Active	2/6/2017
0000968	Entered	PROJECT	WILL	Active	2/6/2017
0000969	Entered	WARRANTY	WILS	Active	2/6/2017
0000970	Entered	PROJECT	WILL	Active	2/6/2017
0000971	Entered			Active	1/26/2017
0000972	Entered			Active	1/27/2017
0000973	Entered			Active	1/28/2017
0000974	Late / Conflict			Active	1/29/2017
0000975	Entered			Active	1/30/2017
0000976	Hold A/R			Active	1/31/2017
0000977	Entered			Active	2/1/2017
0000978	Entered			Active	2/2/2017
0000979	Entered			Active	2/3/2017

Zoom, Alt-Z

OK

Dispatch Inquiry

The **Dispatch Inquiry** is used to view information of Dispatches:

Dispatch Data Inquiry (SMD) 5/30/2017

Task No. 0000952 Assembly Unit

Dispatch No. 0001

1. Header | 2. Lines | 3. Payment | User useriig

Quick Row 3

	Item Code	Ordered	Unit Price	Extension	Comment
1	BEL2500	2.00	582.000	1,164.00	
2	4886-18-14-3	2.00	45.000	225.00	
3	6655	4.00	179.000	1,790.00	

Description: PRINTER STAND W/ BASKET
Warehouse: 001
Unit Of Measure: EACH
Price Level: 1

Total Amount 3,179.00

Quick Print Manufacturing Labor OK

The **Quick Print** button allows for printing Dispatch report for current dispatch:

Crystal Dispatch Printing

Dispatch Form Code STANDARD

Description Dispatch Quick Print

Save

Number of Copies 1 Collated ☐

Adobe PDF

Print Preview Setup

Dispatch Printing

Main Report

Dispatch Printing **SM demo Comapny (SMD)**

Task Number: 0000952
Task Date: 1/22/2015
Customer Number: 01-ABF

Task Time: 10:24:00AM

Preferred Tech: Adams Arnold
Task type: Manufacturing
Nature of Task:
Task Status: Entered
Task Priority:
Contract Number:

American Business Futures
 Racine Warehouse
 5411 Kendrick Place
 Racine, WI 53120

American Business Futures
 2131 N. 14th Street
 Suite 100
 Accounting Department
 Milwaukee, WI 53205-1204

Task Description: Assembly Unit

Dispatch No.	Dispatch Date	Dispatch Tech.	Dispatch Contract Number	Dispatch Equipment No.
0002	1/22/2015	Adams Arnold		1001-HON-H252
BEL2500		POS Terminal	3.00 582.000	0.000 1,746.00
4886-18-14-3		PAPER CADDY 18"W 14"D 3"H	3.00 45.000	0.000 225.00
6655		PRINTER STAND W/ BASKET	6.00 179.000	0.000 1,790.00
Total :				3,761.00
Taxable Amount :				3,761.00
Nontaxable Amount :				0.00
Less Discount :				0.00
Freight :				18.10
Sales Tax :				188.05
Dispatch Total :				3,967.15

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

The Reports Menu

Task/Dispatch Report

The **Task/Dispatch Report** allows for printing information about the tasks and dispatches by applying the desired selection filters. The information can be filtered by **Contract Billing Type** as well as by the selection fields. The Contract Billing Type selection is defaulted to **Time And Material**. Each field can be set to be **Begins with, Ends with, Contains, Less than, Greater than, Range, Equal to** values. Alternatively, you can set a Range with Starting and Ending values for a field.

Task Dispatch Report (SMD) 5/30/2017

Report Setting: STANDARD [Save]

Description: Task Dispatch Report [Include Task History ☒

Setting Options:

- Type: Public [v]
- Print Report Settings: ☐
- Number of Copies: 1 [v]
- Default Report: ☒
- Three Hole Punch: ☐
- Collated: ☒

Selections:

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input type="checkbox"/>
Fixed Percent Complete	<input type="checkbox"/>
Fixed On Going	<input type="checkbox"/>


Select Field	Operand	Value
Customer Number	All [v]	
Contract No.	All [v]	
Task No.	All [v]	
Task Date	All [v]	
Scheduled Date	All [v]	
Task Technician	All [v]	
Task Type	All [v]	
Task Status	All [v]	
Nature Of Task	All [v]	
Dispatch No.	All [v]	
Dispatch Starting Date	All [v]	
Dispatch Technician	All [v]	
Dispatch Status	All [v]	
Line Technician	All [v]	

Adobe PDF [v] Keep Window Open After Print ☐ Preview ☐ [Print] [Preview] [Setup]

Here is an example of printout for Task Dispatch report printed for a specified Contract:

S

Task Dispatch Report



Main Report

Task Dispatch Report

SM demo Comapny (SMD)

Task Total : 0.00

Task No. 0001005 [userig5/20/2017 03:11:20 PM

1001-HON-H252LK

Contract No. : Task Technician

Dispatch No. 0001 Dispatch Date 5/20/2017 Dispatch Tech. ADAM Adams Arnold

Dispatch Contract Number Dispatch Equipment No. 1001-HON-H252LK

/ADAMINSTALL Installation Services 1.00 55.000 0.000 55.00

Total : 55.00

Less Discount : 0.00

Freight : 10.00

Sales Tax : 2.75

Dispatch Total : 67.75

Task Total : 67.75

Task No. 0001007 Pull Material

BEL2500

Contract No. : Task Technician

Task Total : 0.00

Task No. 0001008 Assembly Unit

BEL2500

Contract No. : Task Technician

Dispatch No. 0001 Dispatch Date 5/20/2017 Dispatch Tech. WILL Williams Allen

Dispatch Contract Number Dispatch Equipment No. BEL2500

BEL2500 POSTerminal 2.00 600.000 0.000 1,200.00

4886-18-14-3 PAPER CADDY 18"W 14"D 3"H 2.00 45.000 0.000 90.00

6655 PRINTER STAND W/ BASKET 4.00 179.000 0.000 716.00

Total : 2,006.00

Less Discount : 0.00

Freight : 17.40

Sales Tax : 145.44

Dispatch Total : 2,168.84

Task Total : 2,168.84

Current Page No.: 23


Total Page No.: 24

Zoom Factor: 100%

Technician Dispatch History Report

This Report allows the user to get information about the Tasks/Dispatches by technician:

S Technician Dispatch History Report (SMD) 5/30/2017

Report Setting: STANDARD  Save

Description: Technician Dispatch History Report Include Task History ☒

Setting Options

Type: Public ☐ Print Report Settings ☐ Number of Copies: 1 ☐ Collated ☒

Default Report ☒ Three Hole Punch ☐

Selections

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input type="checkbox"/>
Fixed Percent Complete	<input type="checkbox"/>
Fixed On Going	<input type="checkbox"/>

Select Field	Operand	Value
Dispatch Technician	All	
Contract No.	All	
Task No.	All	
Task Type	All	
Dispatch No.	All	
Dispatch Starting Date	Range	5/1/2017 5/31/2017
Dispatch Status	All	

Adobe PDF ☐ Keep Window Open After Print ☐ Preview ☐

Here is an example of printout for Dispatch Starting Date falling in 05/01/2017 - 05/31/2017 range.

Here is an example of printout:

Technician Dispatch History Report

Main Report

Technician Dispatch History Report

SM demo Comapny (SMD)

Technician ADAM Adams Arnold

Dispatch Date 4/6/2017

Dispatch No.	0001	Task No.	0000996	Install		
Contract No.	000000192	Customer Number	01-ABF	American Business Futures		
INSTALL		Installation Services	2.50	55.000	0.000	137.50
INSTALL		Installation Services	0.25	55.000	0.000	13.75
INSTALL		Installation Services	6.25	55.000	0.000	343.75
BUILD		Building Services	2.00	85.000	0.000	170.00
BUILD		Building Services	2.50	127.500	0.000	318.75

Dispatch Total : 983.75

Dispatch Date 5/17/2017

Dispatch No.	0002	Task No.	0000996	Install		
Contract No.	000000192	Customer Number	01-ABF	American Business Futures		
BUILD		Building Services	3.50	55.000	0.000	192.50
INSTALL		Installation Services	3.25	85.000	0.000	276.25
BUILD		Building Services	0.25	55.000	0.000	13.75
BUILD		Building Services	4.25	82.500	0.000	350.63

Dispatch Total : 833.13

Total for ADAM : 1,816.88

Report Total : 1,816.88

Current Page No.: 1

Total Page No.: 1

Zoom Factor: 100%

Both open and closed Dispatches are included in the report.

Customer Billing History Report

The **Customer Billing History Report** allows the user to get detail information about the Tasks and dispatches created for the selected Customer(s).

Customer Billing History Report (SMD) 5/30/2017

Report Setting: STANDARD Save

Description: Customer Billing History Report Include Task History ☒

Setting Options

Type: Public ☐ Print Report Settings ☐ Number of Copies: 1 ☐

Default Report ☒ Three Hole Punch ☐ Collated ☒

Selections

Select Field	Operand	Value
Customer Number	All	
Task No.	All	
Dispatch No.	All	
Dispatch Date	All	

Adobe PDF ☐ Keep Window Open After Print ☐ Preview ☐ Print Preview Setup

Here is an example of printout:


Customer Billing History Report									
SM Demo Company (SMD)									
Customer Number 01-ABF					American Business Futures				
Task No. 0000816									
Dispatch No. 0001									
3/19/2013	SANT	1001-HON-H252		HON 2 DRAWER LETTER FLEW/C	3.00	84.000	0.000		252.00
					Dispatch Total :				252.00
					Task 0000816 Total :				252.00
Task No. 0000818									
Dispatch No. 0001									
9/10/2013	ROBI	2480-8-50		DESK FILE 8" CAP 50	2.00	34.950	0.000		69.90
					Dispatch Total :				69.90
					Task 0000818 Total :				69.90
Task No. 0000819					Install				
Dispatch No. 0001									
9/10/2013	ROBI	2551-3-50		DESK FILE 3 1/2" CAP 50	2.00	24.950	0.000		49.90
					Dispatch Total :				49.90
					Task 0000819 Total :				49.90
Task No. 0000856									
Dispatch No. 0001									
2/18/2014	ADAM	4886-18-14-3		PAPER CADDY 18"W 14"D 3"H	2.00	45.000	0.000		90.00
2/18/2014	ADAM	6655		PRINTER STAND W/ BASKET	1.00	179.000	0.000		179.00
					Dispatch Total :				269.00
					Task 0000856 Total :				269.00
Task No. 0000945					Get electrical				
Dispatch No. 0001									
1/22/2015	SANT	INSTALL		Installation Services	1.25	30.000	0.000		37.50
					Dispatch Total :				37.50
					Task 0000945 Total :				37.50
Task No. 0000952					Assembly Unit				
Dispatch No. 0001									
1/22/2015	ADAM	BEL2500		POST Terminal	2.00	582.000	0.000		1,164.00
1/22/2015	ADAM	4886-18-14-3		PAPER CADDY 18"W 14"D 3"H	2.00	45.000	0.000		225.00
					Dispatch Total :				1,389.00
					Task 0000952 Total :				1,389.00

Productivity by Territory Report

This Report enables tracking the actual Hours/Amount for each Technician by the Territory code.

The **Territory Code** and **Dispatch Technician** selections are available.

S Productivity by Territory Report (SMD) 5/30/2017

Report Setting: STANDARD  Save

Description: Productivity by Territory Report

Setting Options

Type: Public ☐ Print Report Settings ☐ Number of Copies: 1 ☐

Default Report: ☒ Three Hole Punch: ☐ Collated: ☒

Selections

Select Field	Operand	Value
Territory Code	All	
Dispatch Technician	All	

Adobe PDF

Keep Window Open After Print ☐ Preview ☐

Here is an example of printout:

S Productivity by Territory Report

Main Report

Productivity by Territory Report

SM demo Comapny (SMD)

Region: ARIZON Region Arizona

Technician: ADAM Adams Arnold

Customer No.	Hours	Amount	Days	Hours %	Avg H/Day	Avg \$/Day
01-RSSUPPL	1.50	\$78.38	1	1.58		
01-ABF	93.50	\$5,004.52	15	98.42		
Technician Totals:	95.00	\$5,082.90	16		5.94	\$317.68

Technician: DIX Dixon Michael

Customer No.	Hours	Amount	Days	Hours %	Avg H/Day	Avg \$/Day
01-RSSUPPL	1.00	\$58.50	3	100.00		
Technician Totals:	1.00	\$58.50	3		0.33	\$19.50

Regional Total

96.00	\$5,141.40
--------------	-------------------

Region: CALIF Region California

Technician: DAVI Davis Arnold

Customer No.	Hours	Amount	Days	Hours %	Avg H/Day	Avg \$/Day
01-RSSUPPL	5.50	\$467.50	2	100.00		
Technician Totals:	5.50	\$467.50	2		2.75	\$233.75

Current Page No.: 1 Total Page No.: 1+ Zoom Factor: 100%

Contract Job Code Reports

Contract Job Code Posting History Report

The **Contract Job Code Posting History Report** has been added under the Service Management Reports menu to allow printing contract history information broken out by Job Code.

Contract Job Code Posting History (SMD) 5/30/2017

Report Setting: STANDARD

Description: Contract Job Code Posting History

Setting Options:

- Type: Public
- Print Report Settings: ☐
- Number of Copies: 1
- Default Report: ☒
- Three Hole Punch: ☐
- Collated: ☒

Sort Report By: Contract Number

Selections:

Select Field	Operand	Value
Contract No.	All	
Job Code	All	
Customer Number	All	
Year	All	
Period	All	

Adobe PDF

Keep Window Open After: Print ☐ Preview ☐

Print Preview Setup

Sorting is provided by Contract Number, Job Code and Customer Number.

The following selection criteria may be applied: **Contract No, Job Code, Customer Number, Year and Period.**

Here is an example of the report printed sorted by Job Code:

Contract Job Code Posting History Report

Sorted By Job Code

SM Demo Company (SMD)

Job Code/Description	Contract Nur	Contract Description	Customer Number	Customer Name	Quantity	Cost Billed	Dollars Billed	Profit
000-000-000								
000000014 Building			01-ABF	American Business Futures	5.00	776.00	0.00	-776.00
000000014 Building			01-ABF	American Business Futures	12.00	0.00	1,172.25	1,172.25
Job Code 000-000-000 Totals -					17.00	776.00	1,172.25	396.25
400-000-000 Service Revenue								
000000014 Building			01-ABF	American Business Futures	2.00	100.00	50.00	-50.00
Job Code 400-000-000 Totals -					2.00	100.00	50.00	-50.00
405-000-000 Software - Initial Package								
000000014 Building			01-ABF	American Business Futures	1.00	84.00	34.25	-49.75
Job Code 405-000-000 Totals -					1.00	84.00	34.25	-49.75
410-000-000 Material Used								
000000014 Building			01-ABF	American Business Futures	4.00	1,814.00	1,247.25	-566.75
000000014 Building			01-ABF	American Business Futures	2.00	110.00	200.00	90.00
000000014 Building			01-ABF	American Business Futures	13.00	82.35	1,107.00	1,024.65
000000014 Building			01-ABF	American Business Futures	3.00	847.55	1,287.00	639.45
Job Code 410-000-000 Totals -					22.00	2,653.90	3,841.25	1,187.35
412-000-000 Expendable Material								
000000014 Building			01-ABF	American Business Futures	2.00	68.50	168.00	99.50
000000014 Building			01-ABF	American Business Futures	2.00	68.50	168.00	99.50
Job Code 412-000-000 Totals -					4.00	137.00	336.00	199.00
485-000-000 Training								
000000014 Building			01-ABF	American Business Futures	4.00	180.00	100.00	-80.00
Job Code 485-000-000 Totals -					4.00	180.00	100.00	-80.00
510-000-000 Product Support								
000000014 Building			01-ABF	American Business Futures	2.00	90.00	30.00	-60.00
Job Code 510-000-000 Totals -					2.00	90.00	30.00	-60.00
554-000-000 Shipping								
000000014 Building			01-ABF	American Business Futures	2.00	167.00	262.00	95.00
Job Code 554-000-000 Totals -					2.00	167.00	262.00	95.00

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

Contract Job Code Transaction History

The **Contract Job Code Transaction History Report** added under the **Service Management** provides information about all transactions from Contracts posted to jobs. The report provides a complete, detailed history of activity for the job, including the Invoice Number, Transaction Date, Vendor Number and the Cost.

Contract Job Code Transaction History (SMD) 5/30/2017

Report Setting: STANDARD [Save]

Description: Contract Job Code Transaction History

Setting Options:

- Type: Public [v]
- Print Report Settings: ☐
- Number of Copies: 1 [up/down]
- Default Report: ☒
- Three Hole Punch: ☐
- Collated: ☒

Sort Report By: Contract Number [v]


Selections:

Select Field	Operand	Value
Contract No.	All [v]	
Jobe Code	All [v]	
Customer Number	All [v]	
Transaction Date	All [v]	
Year	All [v]	
Period	All [v]	

Adobe PDF [v] Keep Window Open After: Print ☐ Preview ☐ [Print] [Preview] [Setup]

Sorting is provided by Contract Number, Job Code and Customer Number. The following selection criteria may be applied: **Contract No, Job Code, Customer Number, Transaction Date, Year and Period.** Here is an example of the report printed sorted by Contract Number:

S Contract Job Code Transaction History (SMD) 5/30/2017

Report Setting: STANDARD  Save

Description: Contract Job Code Transaction History


Setting Options:




Type: Public ☐ Print Report Settings ☐ Number of Copies: 1 ☐

Default Report: ☒ Three Hole Punch: ☐ Collated: ☒

Sort Report By: Contract Number

Selections:

Select Field	Operand	Value
Contract No.	All	
Jobe Code	Range	405000000 510000000 
Customer Number	All	
Transaction Date	All	
Year	All	
Period	All	

Adobe PDF ☐ Keep Window Open After ☐ Print ☐ Preview ☐   

Here is an example of printout:

S Contract Job Code Trans History Report

Main Report

Contract Job Code Trans History Report
Sorted By Contract Number

SM demo Comapny (SMD)

Contract Number	Description	Customer Number	Transaction Date	Type	Customer Name	Reference Date	Vendor Number	Quantity	Year	Period	Unit Price	Extension
410-000-000	Material Used	01-ABF	2/19/2014	SO	American Business Futures	10/16/2013	3.00		2014	02	83.33	250.00
*1001-HON-H252												
410-000-000	Material Used	01-ABF	2/19/2014	SO	American Business Futures	10/16/2013	4.00		2014	02	25.00	100.00
*6657-24-20-12												
Contract 000000137 Totals -							7.00					350.00
000000170												
410-000-000	Material Used	01-ABF	2/19/2014	SO	American Business Futures	2/12/2014	5.00		2014	02	30.00	150.00
/SANT0002100	No Problem Found											
412-000-000	Expendable Material	01-ABF	2/19/2014	SO	American Business Futures	2/12/2014	0.00		2014	02	84.00	0.00
1001-HON-H252	HON 2 DRAWER LETTER FLE W/2/19/2014											
Contract 000000170 Totals -							5.00					150.00
000000191 Installation of Software												

Current Page No.: 5 Total Page No.: 5 Zoom Factor: 150%

Standard Modules and Programs Modified for Service Management

Item Maintenance

Select the **Display on Dispatch Board** checkbox to have the Item Code loaded in the Equipment Board.

Select the **Display on Mobile** checkbox if you want the Item Code to be available in the SMP mobile.

Item Maintenance (SMD) 5/30/2017

Item Code: 1001-HON-H252
Description: HON 2 DRAWER LETTER FLE W/O LK

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders | 7. Cost Detail

Product Line: C&A CABLES & ACCESSORIES
Product Type: Finished Good
Valuation: FIFO
Procurement: Buy

Weight: 35
Volume: 0.0000
Inventory Cycle: B

Unit of Measure: Standard EACH
Purchases EACH No. of EACH 1
Sales EACH No. of EACH 1

Display on Dispatch Board ☒ Display on Mobile ☐

Price Code: STD STANDARD QUANTITY PRIC
Default Whse: 000 CENTRAL WAREHOUSE

Primary Vendor: 01-CONT Container Corporation Of Usa
Warranty Code: 30 DAY 30 days from shipment

Sales: Retail Price 84.000
Standard Price 84.000
Last Sold 2/3/2017

Purchases: Standard Cost 32.750
Average Cost 32.338
Last Receipt 5/28/2009

Last Costs: Item 29.575
Allocated .000
Total 29.575

Whse	Description	On Hand	On PO	On SO	On Bk Ord	Committed	On Task	Req for Task	A
000	CENTRAL ...	132.00	11.00	91.00	.00	91.00	.00	.00	
001	EAST WA...	96.00	112.00	157.00	.00	157.00	.00	.00	
002	WEST WA...	19.00	12.00	12.00	10.00	22.00	.00	.00	
097	RETURNS00	.00	.00	.00	.00	.00	.00	

Accept Cancel Delete

The **On Task** and **Req for Task** fields display respectively the Bill Item quantity and Bill Component quantity from Dispatch lines when Manufacturing Dispatch is generated for Bill Item with **Commit Quantity** option turned on.

The **Track Customer Site Inventory** and **Generate Multiple Contracts** fields have been added to the **Additional** tab of the **Item Maintenance** screen.

Item Maintenance (SMD) 5/30/2017

Item Code: 1001-HON-H252
Description: HON 2 DRAWER LETTER FLE W/O LK

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders | 7. Cost Detail

Confirm Cost Increase in Receipt of Goods: ☐
Print Receipt Labels: Yes
Explode Kit Items: Prompt
Next Lot/Serial Number:

Commission Method: Standard
Commission Rate: 0.000%
Base Commission: .00

Allow Returns: ☒
Restocking Charge Method: None
Restocking Charge Rate: .000%

Categories:
COLOR: BLACK
SIZE: 29X15X18
STYLE: MODERN
CATALOGUE REF#: P0011-0007

Sales Tax Class: TX Taxable
Purchases Tax Class: TX Taxable

Routing No.:
Buyer Code:
Planner Code:
Commodity Code:
Image: abc_1001-hon-h252.jpg

Inactive Item: ☐
Allow Back Orders: ☒
Allow Trade Discount: ☒
Allocate Landed Cost: ☒
Internet Enabled: ☒
Track Customer Site Inventory: ☒
Generate Multiple Contracts: ☐

Last Physical Count:

Job Code: 412-000-000 Expendable Material
Contract No.: 000000191 Installation of Software

Accept Cancel Delete

Check the **Track Customer Site Inventory** box to be able to track the Inventory sold to the Customer when entering item for the task.

If the **Generate Multiple Contracts** box is selected you may enter/select a **Contract** number to be used as template when contracts are generated for current Item during **Daily Sales Reports/Updates**. Separate contracts are generated for each unit sold.

Use the **Job Code** field to enter the desired Job Code for a given item. Whenever the item is sold against a contract, appropriate costing and billing information will be posted to the contract file, organized by Job Code.

The **Dispatch** option added on the Orders tab allows for viewing all active Dispatches where the selected Item is committed.

Item Maintenance (SMD) 5/30/2017

Item Code: 1001-HON-H252
Description: HON 2 DRAWER LETTER FLE W/O LK

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders | 7. Cost Detail

☐ Purchase Order ☐ Sales Order ☒ Dispatch

Task No.	Dispatch No.	Dispatch Date	Whse	Ordered
0000969	0003	5/19/2017	000	2.00
0000985	0001	2/20/2017	000	2.00

Ordered: 4.00

Accept Cancel Delete ?

The **Contract** button added to the **More** menu buttons allows opening the **Contract Item Pricing Change** screen and updating the Contract Item Price if needed.

S Item Maintenance (SMD) 5/30/2017

Item Code: 1001-HON-H252
Description: HON 2 DRAWER LETTER FILE W/O LK

Copy From... Renumber... More...

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders | 7. Cost Detail

☐ Purchase Order ☐ Sales Order ☒ Dispatch

Task No.	Dispatch No.	Dispatch Date	Whse	Ordered
0000969	0003	5/19/2017	000	2.00
0000985	0001	2/20/2017	000	2.00

Ordered: 4.00

Accept Cancel Delete ?

More... menu:
Vendors
Alias
Alternate
Reorder
Pricing
Price Lookup
Sales Promotion
Lot / Serial
IT Item
BOM Maintenance
Contract Item

S Contract Item Pricing Change

Select Field	Operand	Value
Customer Number	All	
Contract Number	All	

Also Expired Contracts ☐

Contract No.	Customer No.	Starting Date	Ending Date	Description	Item Lot/Serial No	Quantity	Price	New Price	Includ
--------------	--------------	---------------	-------------	-------------	--------------------	----------	-------	-----------	--------

Proceed Clear Cancel Update

After making the required selections click **Proceed** to load corresponding records in the grid. Enter the **New Price** and select the **Include** checkbox. Click **Update** to apply the **New Price**.

	Contract No.	Customer No.	Starting Date	Ending Date	Description	n Lot/Serial	Quantity	Price	New Price	Include
1	000000023	02-ALLENAP	2/26/2002	4/26/2019	Support Plan - 20 Hours		1.00	80.00	100.00	<input checked="" type="checkbox"/>
2	000000174	01-ABF	2/14/2014	2/14/2019	Installation Support		2.00	30.00	84.00	<input type="checkbox"/>
3	000000191	01-ABF	1/25/2017	1/26/2018	Installation of Software		2.00	.00	84.00	<input type="checkbox"/>
4	000000192	01-ABF	2/6/2017	2/7/2018	Install		1.00	75.00	84.00	<input type="checkbox"/>
5	000000193	01-ABF	2/6/2017	2/7/2018	Install		1.00	75.00	84.00	<input type="checkbox"/>
6	AVNET	01-AVNET	3/31/2014	4/3/2024	Support Plan - 20 Hours		2.00	.00	84.00	<input type="checkbox"/>
7	T00000009	01-ABF	5/27/2009	5/26/2019	Preventive Maintenance Cor		1.00	150.00	84.00	<input type="checkbox"/>

After Update the **Price** field is updated with the New Price:

S Contract Item Pricing Change

Select Field	Operand	Value
Customer Number	All	
Contract Number	All	

Also Expired Contracts ☐

	Contract No.	Customer No.	Starting Date	Ending Date	Description	n Lot/Serial	Quantity	Price	New Price	Include
1	000000023	02-ALLENAP	2/26/2002	4/26/2019	Support Plan - 20 Hours		1.00	100.00	100.00	<input checked="" type="checkbox"/>
2	000000174	01-ABF	2/14/2014	2/14/2019	Installation Support		2.00	30.00	84.00	<input type="checkbox"/>
3	000000191	01-ABF	1/25/2017	1/26/2018	Installation of Software		2.00	.00	84.00	<input type="checkbox"/>
4	000000192	01-ABF	2/6/2017	2/7/2018	Install		1.00	75.00	84.00	<input type="checkbox"/>
5	000000193	01-ABF	2/6/2017	2/7/2018	Install		1.00	75.00	84.00	<input type="checkbox"/>
6	AVNET	01-AVNET	3/31/2014	4/3/2024	Support Plan - 20 Hours		2.00	.00	84.00	<input type="checkbox"/>
7	T00000009	01-ABF	5/27/2009	5/26/2019	Preventive Maintenance Cor		1.00	150.00	84.00	<input type="checkbox"/>

Proceed Clear Cancel Update

Product Line Maintenance

Use the **Job Code** field to enter the desired Job Code for a given product line. Whenever items from this product line will be sold against a contract, appropriate costing and billing information will be posted to the Contract File, organized by Job Code.

The screenshot shows the 'Product Line Maintenance (SMD) 5/30/2017' window. The 'Product Line' is 'C&A' and the 'Description' is 'CABLES & ACCESSORIES'. The 'Unit of Measure' is 'EACH'. The 'Job Code' field is highlighted with a red box, showing the value '400-000-000' and the label 'Service Revenue'. Other fields include 'Product Type' (Finished Good), 'Valuation' (Standard Cost), 'Procurement' (Buy), 'Inventory Cycle' (C), 'Allow Back Orders' (checked), 'Allow Trade Discount' (checked), 'Inactive Item' (unchecked), 'Explode Kit Items' (Prompt), 'Commission Method' (Standard), 'Commission Rate' (0.000%), 'Base Commission' (.00), 'Confirm Cost Increase in Receipt of Goods' (unchecked), 'Allocate Landed Cost' (checked), 'Sales Tax Class' (TX), 'Purchases Tax Class' (TX), 'Print Receipt Labels' (Yes), 'Commodity Code' (empty), 'Price Code' (STD), 'Warranty Code' (empty), 'Allow Returns' (unchecked), 'Restocking Charge Method' (None), and 'Restocking Charge Rate' (.000%).

The program will search for Job Codes based on priorities. It will search first in the Inventory Master File, then in the Product Line Master File. If the system fails to find Job Codes in either of these master files, then it will use a **Material Job Code** from the **Service Management Options** program.

Bill of Materials Maintenance

The **SM Routing Number** is used in the manufacturing/repair/installation of current Bill. The user can enter it manually or select from the Routing Numbers list opened through the Lookup button.

Bill of Materials Maintenance (SMD) 5/30/2017

Bill Number: BEL2850
Revision: 000
Bill Type: Kit
Description 1: Printer Unit
Description 2:

1. Header | 2. Lines

Drawing Number:
Drawing Revision:
Routing Number:
SM Routing No.: POS INSTALLATION
Current Revision: 000
Date Last Used:
Maximum Lot Size: 0

Print Components: ☐
Bill Has Options: ☐

Option Categories

1	<input type="checkbox"/> Required
2	<input type="checkbox"/> Required
3	<input type="checkbox"/> Required
4	<input type="checkbox"/> Required
5	<input type="checkbox"/> Required
6	<input type="checkbox"/> Required
7	<input type="checkbox"/> Required
8	<input type="checkbox"/> Required
9	<input type="checkbox"/> Required

Accept Cancel Delete

The Routing Numbers set up in the **SM Routing Maintenance** are listed here.

Routing Number	Description
APRON_MFG	Apron MFG
COMPRESSOR	Compressor Manufacturing
DOOR INSTALLATION	Door Installation
MAS90_EBUS	Install driver
MAS90_INSTALLATION	MAS90 Installation Steps
POS INSTALLATION	Point of Sale Installation
POS-SIGNATURE	Signature Pad installation
STAGE	Stage Installation

Search Routing Number Begins with Find

Filters...

Custom... Lookup Wizard... Select Cancel

Found 8 records

Customer Maintenance

Main Tab

The **Territory Code** field and the **Hours** button have been added under on the **Main** tab of the **Customer Maintenance** screen.

Customer Maintenance (SMD) 5/30/2017

Customer No. 01-ABF

Name American Business Futures

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transaction | 8. S/Os | 9. S/Ms

Address 2131 N. 14th Street
Suite 100
Accounting Department

ZIP Code 53205-1204

City Milwaukee State WI

Country USA United States

Residential Addr ☐

Salesperson 0100 Jim Kentley Split Comm...

Telephone (414) 655-4787 Ext 219

Fax

Territory Code ARIZON Region Arizona

E-mail Address artie@abf.com

URL Address www.abf.com

Terms Code 01 Net 30 Days

Primary Contact ARTIE JOHN Artie Johnson

Ship Code SHIP PROD

Primary Ship To 2 American Business Future

Tax Schedule CA California Exemptions...

Calculate taxes on Labor Items ☒

Credit Hold ☐

Credit Limit 120,000.00

Hours... Paperless...

Accept Cancel Delete

The **Territory Code** can be entered from the **Main** tab when the customer does not have several **Ship To Addresses**. The **Territory Code** can be entered also in the **Customer Ship To Address Maintenance** screen. Together with the **Territory Code** in the **Technician Master File**, this code can be used to filter out the tasks that can be dispatched to a given technician.

The “**Calculate taxes on Labor item**” checkbox is available on the **Main** tab of the **Customer Maintenance** if the “**Calculate taxes on Labor based on**” option is not set to **None** in the S/M options. Check this box to use the **Tax Classes** on Dispatch Lines.

Use the **Hours** button to launch the **Customer Hours Maintenance** screen to maintain the daily opening and closing times for the customer.

	Open Time	Close Time
Monday	9:00AM	6:00PM
Tuesday	9:00AM	6:00PM
Wednesday	9:00AM	6:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	5:00PM
Saturday	9:00AM	2:00PM
Sunday		

These hours can be viewed during **Task Data Entry** and **Dispatch Data Entry**.

The **Territory Code** field has been added to the **Customer Ship To Address Maintenance** screen. In conjunction with the **Territory Code** in the **Technician Master File**, this code can be used to filter out the tasks that can be dispatched to a given technician.

Customer Ship-To Address Maintenance

Location Code: 2

Name: American Business Futures

Primary: ☒

Address: Racine Warehouse

Residential Address: ☐

Hours: [Hours](#)

ZIP Code: 53120

City: Racine State: WI

Country: USA United States

Telephone: (414) 995-4319 Ext:

Fax: Batch Fax: ☐

E-mail Address:

[Contact](#): JOHN QUINN John Quinn

[Warehouse](#): 001 EAST WAREHOUSE

[Salesperson](#): 0100 Jim Kentley

[Ship Via](#):

[Territory Code](#): ARIZON Region Arizona

Sales Tax: [Tax Schedule](#) CA California

Exemptions... [Exemptions...](#)

Calculate taxes on Labor Items: ☒

Accept Cancel Delete

Use the **Hours** button to launch the **Customer Ship to Hours Maintenance** screen to maintain the daily opening and closing times for the customer job site. These hours can be viewed during **Task Data Entry** and **Dispatch Data Entry**.

	Open Time	Close Time
Monday	8:00AM	5:00PM
Tuesday	8:00AM	6:00PM
Wednesday	8:00AM	6:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	5:00PM
Saturday	9:00AM	2:00PM
Sunday	12:00AM	12:00AM

Check the **Calculate taxes on Labor** box to use the **Tax Classes** on Dispatch Lines, when the Ship to Address is selected for the task. This option is not available if the “**Calculate taxes on Labor based on**” option is set to “**None**” in the **S/M options**.

Additional Tab

You can select the **Default Task Number** to be displayed automatically when selecting the customer in the **Quick Dispatch Line Entry** program.

Enter a letter or number for the **Bill Frequency Code** to denote a scheme of Billing Frequency.

Select the **Contract is Required for Task** and **Customer PO Number is Required for Task** check boxes if you want the Tasks for current Customer to be always created with Contract and Customer PO Number specified.






When one of the boxes is checked, the program will not accept Task Entries without **Contract number** or **Customer PO** specified.

S/Ms Tab

The **S/Ms** tab represents a list box, which displays all **Contracts** and **Tasks** for current Customer. Contract and Task Nos display all Contracts and Tasks sequentially.

The Contract's **Total Amount** is displayed in the **Amount** field.

S Customer Maintenance (SMD) 5/30/2017




Customer No. 01-ABF      Copy From... Renumber... More...

Name American Business Futures

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transaction | 8. S/Os | 9. S/Ms

Contract No.	Start Date	End Date	Type	Status	Billing Type	Amount	Description
000000190	7/22/2016	7/22/2020	Service	New	Time and Material	0.00	[Userig 00000
000000191	1/25/2017	1/26/2018	Fixed Hours	New	Time and Material	0.00	Installation of S
000000192	2/6/2017	2/7/2018	Fixed Hours	New	Time and Material	2,000.0	Task Data Entry, Alt-E
000000193	2/6/2017	2/7/2018	Fixed Hours	New	Time and Material	2,500.00	Install
000000194	4/6/2017	4/6/2017	Service	New	Time and Material	0.00	

Task No.	Entry Date	Contract No.	Type	Status	Nature of Task	Pref. Tech	Territory
0000944	1/21/2015		Service Call	Entered		SANT	ARIZON
0000945	1/22/2015		Installation	Entered		ADAM	CALIF
0000946	1/22/2015		Installation	Entered		SANT	ARIZON
0000947	1/22/2015		Installation	Entered		SANT	ARIZON
0000948	1/22/2015		Manufacturing	Entered		ADAM	ARIZON

 Accept Cancel Delete  

Use the Search button located to the right of the list box to search for Contracts/Tasks by applying additional selection filters.

Search for SMs

Contract Types to View

☒ All Types ☒ Service ☒ Prev. Maint. ☒ Fixed Hours

Contract Billing Types to View

☒ All Billing Types ☒ Time and Material ☒ Fixed Percent Compl. ☒ Fixed Upon Compl. ☒ Fixed On Going

Contract Statuses to View

☒ All Statuses ☒ Hold ☒ New ☒ Open ☒ Closed

Tasks

☐ View Tasks by Contract ☒ Active ☐ History

Select Field	Operand	Value
Contract Number	All	
Contract Starting Date	All	
Contract Ending Date	All	

OK Cancel

Select the **View Tasks by Contract** to load in the list box only the Tasks associated with the selected Contract.

Customer No. 01-ABF
Name American Business Futures

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transaction | 8. S/Os | 9. S/Ms

Contract No.	Start Date	End Date	Type	Status	Billing Type	Amount	Description
000000014	2/26/2002	2/26/2018	Prev. Maint.	New	Fixed Percent Compl.	950.00	Building
000000018	2/26/2002	4/10/2020	Service	New	Time and Material	1,500.00	Furniture repair
000000040	11/20/2008	11/21/2015	Service	New	Time and Material	69.90	Shipping
000000174	2/14/2014	2/14/2019	Prev. Maint.	New	Time and Material	1,200.00	Installation Sup
000000182	3/19/2014	3/17/2024	Prev. Maint.	New	Time and Material	55.00	Preventive Ma

Task No.	Entry Date	Contract No.	Type	Status	Nature of Task	Pref. Tech	Territory Co
0000947	1/22/2015	000000014	Installation	Entered		SANT	ARIZON

Accept Cancel Delete

The **Active** checkbox is selected by default to view Active Tasks. Select the **History** checkbox to view also the Tasks from History (with status “Closed”).

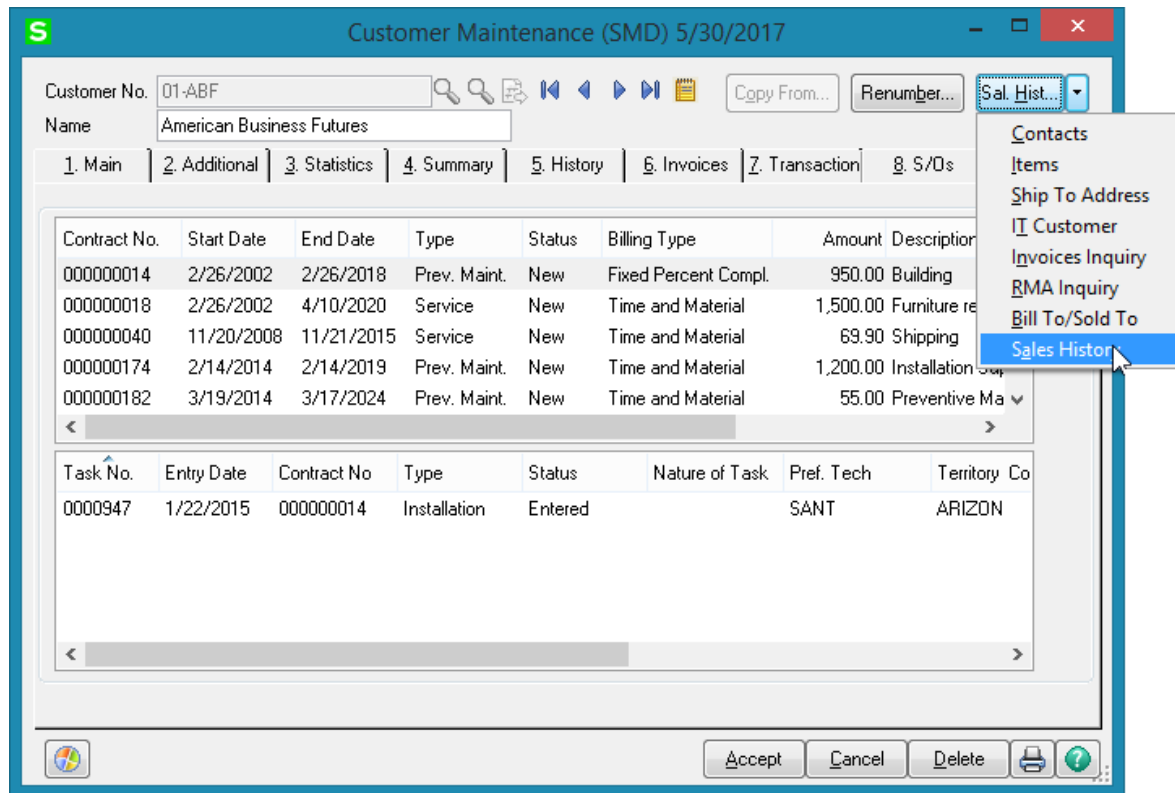
By default **All Types**, **All Billing Types** and **All Statuses** are selected for **Contracts** to view.

Use the buttons located to the right to access correspondingly the **Contract Maintenance** and **Task Data Entry**.

The **S/Ms** list box has been provided also in the **Customer Inquiry**. Drill down to the **Task Inquiry** is available from S/M- s tab of the **Customer Inquiry**.

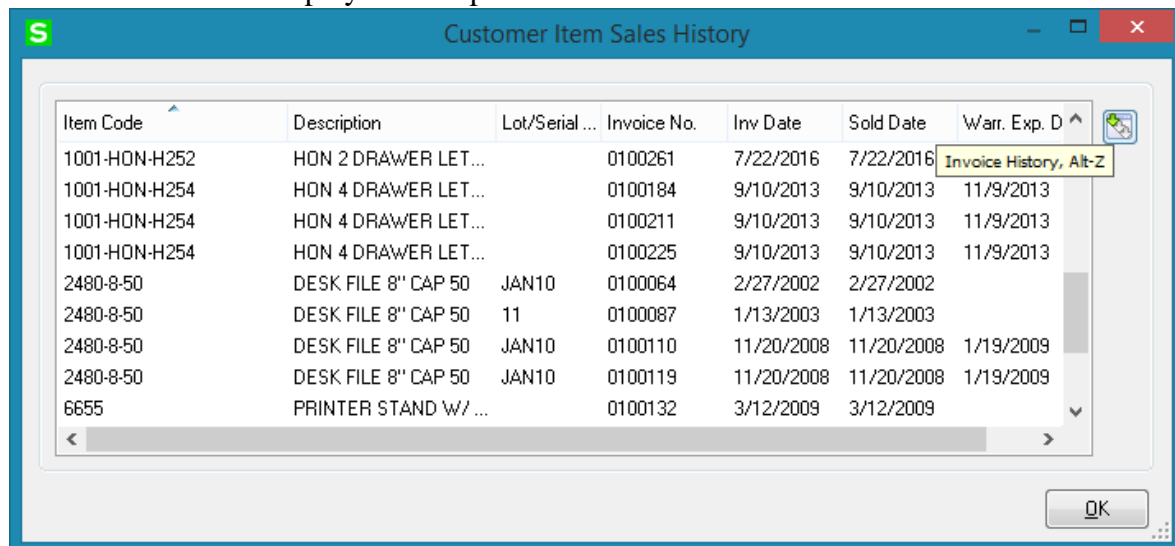
Customer Sales History

The **Sales History** button added under the **More...** drop down menu allows for viewing the Sales History of current Customer for the Items having the **Track Customer Site Inventory** option selected on the **Additional** tab of **Item Maintenance**.



Upon pressing **Sales History** button, the **Customer Item Sales History** screen is opened loaded with respective information about the Item, Invoice number, Invoice Date, Sold Date and Warranty Expiration Date.

The Sold Date field displays the Ship Date from Invoice Header.



There is an option for drill down to the Invoice History.

Sales Order Entry

Use the **Contract No.** field to enter a **Contract Number** in order to sell items against that contract. Any existing contract can be selected using the **Lookup** button (the Template contracts are not displayed in the lookup).

The screenshot shows the 'Sales Order Entry (SMD) 5/30/2017' window. The 'Contract No.' field is highlighted with a yellow box and the text 'Next Contract No., Alt W'. The window contains the following fields and values:

- Order Number: 0000386
- Order Date: 5/30/2017
- Order Type: Standard Order
- Customer No.: 01-ABF
- Contract No.: 000000018
- Ship Date: 5/30/2017
- Status: New
- Whse: 001
- Sales Tax: CA
- Ship To Add: 2
- Terms Code: 01
- Ship Via: SHIP PROD
- Confirm To: John Quinn
- E-mail: artie@abf.com
- Fax No.:
- Comment:
- Salesperson: 0100
- Split Comm.: No

Buttons at the bottom include: Print Order, Print Pick, Recalc Price, Accept, Cancel, Delete, and a printer icon.

You can also create a new contract based on a template Contract clicking the **Next Contract No.** button.

Contract No.	Customer No	Bill To Name	Contract Description
T00000006	02-CUSTOM	Custom Craft Products	Install
T00000007	01-ABF	Orange Door & Window Co.	POS Terminal Warranty
T00000008	02-ATQZ	A To Z Carpet Supply	Door Installation template Con
T00000009	01-ABF	American Business Futures	Preventive Maintenance Contrac

Search Contract No. Begins with Find

Filters...

Custom... Lookup Wizard... Select Cancel

Found 4 records

If the **Allow Transfer Lines From Template Contract To Sales Order** checkbox is selected in the **Sales Order Options**, the Contract Items screen is opened upon selecting a Template Contract allowing the user to select the Items to be loaded in the Sales Order lines. By default all lines are marked as Include.

The screenshot shows the 'Sales Order Entry (SMD) 5/30/2017' window. The 'Contract Items' dialog box is open, displaying a table of items for Contract No. T00000007.

Item Code	Description	Orderd	Amount	Include
1001-HON-H254		1	130	<input checked="" type="checkbox"/>
6655		2	170	<input checked="" type="checkbox"/>
GB-EL04MS-07		5	10	<input checked="" type="checkbox"/>

The background window shows the 'Order Number' 0000387, 'Order Date' 5/30/2017, 'Order Type' Standard Order, and 'Customer No.' 02-CUSTOM. The 'Status' is set to 'New' and 'Whse' is '001'.

The **Contract Options** screen is opened to allow setting the **All Materials Are Covered**, **All Labor Is Covered** options and enter **Contract Total Amount**. This screen is opened only if the user is authorized (the **Allow To Change Coverage Flag and Amount** security event enabled in the **Role Maintenance**) to change these flags and the Contract Total Amount.

The 'Contract Options' dialog box is shown. It contains two checkboxes: 'All Materials Are Covered' and 'All Labor Is Covered', both of which are currently unchecked. To the right, the 'Contract Total Amount' is set to 200.00. At the bottom, there are 'Proceed' and 'Cancel' buttons.

Note that attached contract can be changed in the Lines tab for each item separately. If the **Item contract instead of Order Contract** box is checked in the **Service Management Options** program, items will have assigned the contracts specified for them in the **Item Maintenance** program.

The **Unit Price** and quantity **Ordered** fields are loaded from contract Items and can be changed if needed.

Sales Order Entry (SMD) 5/30/2017

Order Number: 0000387

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment | User: useriig

	Item Code	Item Contract	Ordered	Back Ordered	Unit Price	Extension
1	1001-HON-H254	000000197	1.00	.00	130.000	130.00
2	6655	000000197	2.00	.00	170.000	340.00
3	GB-EL04MS-07	000000197	5.00	.00	10.000	50.00
4			.00	.00	.000	.00

Gen. Mult. Contr. ☐

Contract Bill Item ☐

Ship Date: 5/30/2017

Task No.:

Dispatch No.:

(Average Cost = 83.500)

Total Amount: 520.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

Installation Order Management

The **Installation Order** checkbox added on the Header tab of **Sales Order Entry** enables installation management process. The **Management** button is enabled upon selecting the **Installation Order** checkbox. Upon pressing the button Installation Management screen is opened with respective checkboxes intended for tracking installation management:

S Sales Order Entry (SMD) 5/30/2017

Order Number: 0000387

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment | User: useriig

Order Date: 5/30/2017 | Order Type: Standard Order | Master/Repeating No.:

Customer No.: 02-CUSTOM | Custom Craft Products

Cust PO:

Contract No.: 000000197 | POS Terminal Warranty | Installation Order: ☒ | Management

Ship Date: 5/30/2017

Status: New | Reason: | Whse: 001 | EAST WAREHOUSE

Sales Tax Schedule:

Ship To Addr: 21 | Custom Craft Products

Terms Code: 02 | 2% Ten Days, Net 30 Days

Ship Via: UPS BLUE | FOB:

Confirm To: Rex Anderson

E-mail:

Fax No. | Batch Fax: ☐

Comment:

Salesperson: 0300 | Harvey Earlwright

Split Comm.: No | Split Comm.:

Print Order: ☒ | Print Pick Sheets: ☒ | No. of Ship Labels: 1

Quick Print Without Displaying Printing Window: ☐ | Docs Path:

Print Order... | Print Pick... | Recalc Price | Accept | Cancel | Delete

S Installation Management...

Order Review ☐

Ready for Installation ☐

Credit Approved ☐

In Production ☐

Installation In Process ☐

Installation Completed ☐

Change Order ☐

Some of these checkboxes are set automatically.

Order Review – this field should be checked manually.

Ready for Installation –when checked indicates that inventory is available for installation. This checkbox should be set manually by inventory manager if inventory is in stock for all items.

In Production – shows that the Production Task has been generated and being produced. Is automatically checked when a Production Task is generated.

Installation in process – indicates that the Installation Task has been generated and item is being prepared to be installed. This checkbox is set automatically when an Installation Task is generated.

Installation Completed – this checkbox is set automatically when the installation task is closed. It will be disabled if the routing assigned to the sales order doesn't contain an installation type task (setup in the Sales Order Setup Options program). This checkbox can be setup manually if needed.

Change Order – this flag is automatically set when changes are made to any of the following information on the order:

- changes to price after order review flag is set;
- changes to quantity ordered after Inventory Ready for Installation flag is set;
- adding/deleting items from the order with the Order Review checkbox selected.

Once the checkbox is set, only authorized user may clear it. It is managed by a security role.

Credit Approved – this checkbox is automatically set if the **Credit Approve All Orders** checkbox is selected in the **Sales Order Options** and the Sales Order is Accepted for the Customers with Credit Hold flag turned off in the Customer Maintenance.

If the **Credit Approve All Orders** checkbox is not selected in the Sales Order Options the **Credit Approved** setting becomes role based and only authorized users are allowed to set this flag.

Sales Order Options (SMD) 5/30/2017

1. Main | 2. Entry | 3. Line Entry | 4. Forms | 5. Printing | 6. Quick Print | 7. History | 8. Job Cost

Batch Processing

Description	Enable	Next Batch
Invoice Data Entry	<input checked="" type="checkbox"/>	00044

Next Automatic Sales Order Number: 0000388
Next Automatic Invoice/Shipping Number: 0100286

Files to Check for Duplicate Customer PO Numbers

- ☐ Check Sales Order Entry
- ☐ Check Sales Order Invoice Data Entry
- ☐ Check Sales Order History
- ☐ Check Accounts Receivable Invoice Data Entry
- ☐ Check Accounts Receivable Invoice History

Task Types For

Production Installation

Commissions

- ☒ Split Commissions Between Salespersons
- ☐ Customer Split Commission to Override Ship-To Salesperson

Default Warehouse for Order/Invoice Header: 001

Use Shipping Code to Calculate Freight: Yes

Allow Transfer Lines From Template Contract to Sales Order: ☒

Quotes

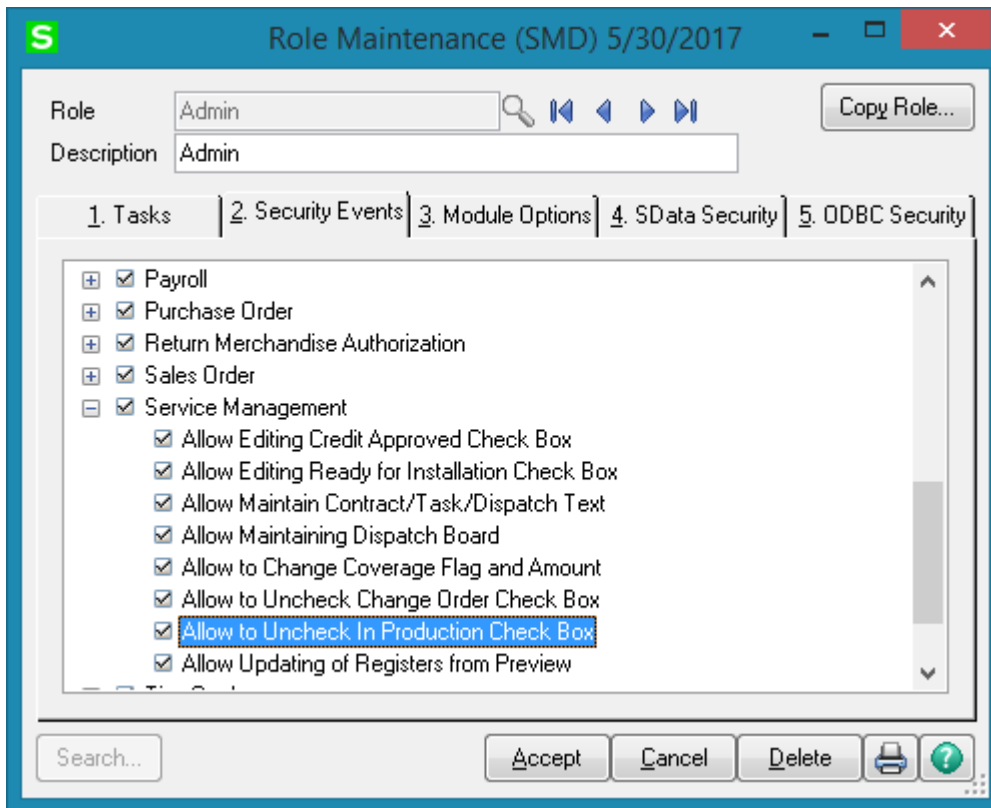
- ☐ Use Default Order Date When Promoting to Order
- Default Days Until Quote Expires: 999

Installation Management

- ☒ Credit Approve All Orders

Accept Cancel Print Help

The **Ready for Installation**, **Change Order** and **In Production** settings are also role based and only authorized users are allowed changing these options manually:



The Installation Task cannot be dispatched if the **Order Review**, **Credit Approved** and **Ready for Installation** flags are not set.

Sales Order Memo

For installation orders a record is automatically added to the Sales Order memo with a time stamped comment for each change made.

When a change is made in the installation order, upon accepting the Order a new Sales Order Memo Code (IM_Changes) is automatically added to the Sales Order memos with respective comments about the changes stamped with User ID and the time.

S Sales Order Entry (SMD) 5/30/2017

Order Number 0000387 Copy From... Defaults... Customer... Credit... Task...

1. Header | 2. Address | 3. Lines **Memo, Alt-H** | 4. Totals | 5. Payment | User useriig

Order Date 5/30/2017 Order Type Standard Order Master/Repeating No.

Customer No. 02-CUSTOM Custom Craft Products

Cust PO

Contract No. 000000197 PDS Terminal Warranty Installation Order ☒ Management

Ship Date 5/30/2017

Status New Reason

Whse 001 EAST WAREHOUSE

Sales Tax Schedule CA

California

Ship To Addr 21 Custom Craft Products

Terms Code 02 2% Ten Days, Net 30 Days

Ship Via UPS BLUE FOB

Confirm To Rex Anderson

E-mail

Fax No. Batch Fax ☐

Comment

Salesperson 0300 Harvey Earlwright

Split Comm. No

Print Order ☒

Print Pick Sheets ☒

No. of Ship Labels 1

Quick Print Without Displaying Printing Window ☐ Docs Path

S Sales Order Memo Maintenance (SMD) 5/30/2017

Memo Code: IM_CHANGES

Description: Installation Managment Changes

Memo Date: 5/30/2017

Expiration Date:

Auto Display: Never

Reminder Start Date:

Reminder End Date:

Attachment:

Change Order checkbox is automatically checked due to:
Changed Unit Price.
Changed Quantity Ordered.
Added New Line.[useriig 5/30/2017 04:14:26 PM]

Accept Cancel Delete Print ?

New stamped comments are added in the following cases:

- Qty ordered is changed for some line
- Unit Price is changed
- A line is Added/Deleted

Sales Order Tracking Dashboard

The **Sales Order Tracking Dashboard** has been added under the Sales Order Main menu to enable management of open orders easily. This program allows for displaying the orders matching the selections made.

The following options are available:

- **Order Review**
- **Ready for Installation**
- **In Production**
- **Installation In Process**
- **Installation Completed**
- **Change Order**
- **Credit Approved**

The screenshot shows a software window titled "S/O Order Tracking Dashboard". It features a top navigation bar with a green "S" logo and standard window controls. The main area is divided into several sections:

- Status Filters:** A grid of checkboxes for various order statuses. Each status has an "Ignore" checkbox and a checked "confirm" checkbox. The statuses are: Order Review, Ready for Installation, In Production, Installation In Process, Installation Completed, Change Order, Credit Approved, and Ship Date (which has a date picker instead of a checkbox).
- Filter Table:** A table with columns "Select Field", "Operand", and "Value". It contains three rows: "Sales Order Number" with "All" selected in the operand dropdown, "Sales Order Date" with "All", and "Customer Number" with "All".
- Data Table:** A large table with columns: Sales Order No., Customer No., Name, Order Date, and Ship Date. The table body is currently empty.
- Controls:** At the bottom, there are "Clear", "Scan", and "Cancel" buttons.

By this program the user can view:

- All the new installation orders that are added to the system,
- All installation orders that are entered, inventory is checked and purchase orders are ordered as needed

This program allows also for entry of **Ship Date** as a selection option. This selection option allows the users to view past due orders/tasks (requiring actions).

It is necessary to press scan after making the necessary selections:

S/O Order Tracking Dashboard

Order Review ☒ Ignore ☐ Installation Completed ☐ Ignore ☒
 Ready for Installation ☐ Ignore ☒ Change Order ☐ Ignore ☒
 In Production ☐ Ignore ☒ Credit Approved ☐ Ignore ☒
 Installation In Process ☐ Ignore ☒ Ship Date 5/30/2017

Select Field	Operand	Value
Sales Order Number	All	
Sales Order Date	All	
Customer Number	All	

Sales Order No.	Customer No.	Name	Order Date	Ship Date
0000115	01-ABF	American Business Futures	5/18/2017	5/21/2017
0000385	01-ABF	Avnet Processing Corp	5/20/2017	5/30/2017
0000387	02-CUSTOM	Custom Craft Products	5/30/2017	5/30/2017

Clear Scan Cancel

In our example the program loaded only the Orders, which are reviewed (Order Review checkbox is selected in the Installation Management screen) and have a Ship Date equal or less than the Ship Date: 5/30/2017 specified on the screen. All other checkboxes have been ignored.

The Zoom button allows the user to open the selected Sales Order.

Sales Order Options

The **Allow Transfer Lines From Template Contract To Sales Order** checkbox has been added on the **Entry** tab of **Sales Order Options** screen to allow for transferring the desired Items/plans from template Contract Items to the Sales Order lines.

Credit Approve All Orders – this option is intended for Sales Order Installation Management. If checked, the **Credit Approved** flag in the Installation Management screen is automatically set while accepting an Order entered for the Customer with Credit Hold flag turned off in the Customer Maintenance.

If the **Credit Approve All Orders** checkbox is not selected the Credit Approved flag is disabled and only authorized users are allowed to set it manually.

Sales Order Options (SMD) 5/30/2017

1. Main | 2. Entry | 3. Line Entry | 4. Forms | 5. Printing | 6. Quick Print | 7. History | 8. Job Cost

Batch Processing

Description	Enable	Next Batch
Invoice Data Entry	<input checked="" type="checkbox"/>	00044

Next Automatic Sales Order Number: 0000388
Next Automatic Invoice/Shipping Number: 0100286

Commissions

Split Commissions Between Salespersons: ☒
Customer Split Commission to Override Ship-To Salesperson: ☐

Default Warehouse for Order/Invoice Header: 001
Use Shipping Code to Calculate Freight: Yes

Allow Transfer Lines From Template Contract to Sales Order ☒

Quotes

Use Default Order Date When Promoting to Order: ☐
Default Days Until Quote Expires: 999

Files to Check for Duplicate Customer PO Numbers

Check Sales Order Entry: ☐
Check Sales Order Invoice Data Entry: ☐
Check Sales Order History: ☐
Check Accounts Receivable Invoice Data Entry: ☐
Check Accounts Receivable Invoice History: ☐

Task Types For

Production: P Installation: I

Installation Management

Credit Approve All Orders: ☒

Accept Cancel

The **Task Types for** options allow specifying Task types to be used when generating Task for Sales Order Header.

Creating Sales Order Based on Template Contract

If the **Allow Transfer Lines From Template Contract To Sales Order** checkbox is selected in the Sales Order options, while creating a Sales Order the user may create a new Contract based on the template contract or select an existing Contract and add additional Items from the template Contract:

Upon pressing the Next Contract button the list of Template Contract Numbers is opened to allow selecting the desired template contract to load the Items from:

The screenshot shows the 'Sales Order Entry (SMD) 5/30/2017' window. The 'Next Contract' button is highlighted. The 'Template Contract Number List' dialog box is open, displaying a table of template contracts. The table has four columns: Contract No., Customer No., Bill To Name, and Contract Description. The row with Contract No. T00000009 is selected. The dialog box also includes a search bar, a 'Find' button, and a 'Select' button.

Contract No.	Customer No.	Bill To Name	Contract Description
T00000006	02-CUSTOM	Custom Craft Products	Install
T00000007	01-ABF	Orange Door & Window Co.	POS Terminal Warranty
T00000008	02-ATDZ	A To Z Carpet Supply	Door Installation template Con
T00000009	01-ABF	American Business Futures	Preventive Maintenance Contract

All the lines marked as **Included** are loaded in the Sales Order lines with respective quantity Ordered and Amount:

The screenshot displays the 'Sales Order Entry (SMD) 5/30/2017' window. The 'Contract Items' dialog is open, showing a table of items to be included in the sales order. The table has columns for Item Code, Description, Orderd, Amount, and Include. Two items are listed: '1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK' and '2480-8-50 DESK FILE 8" CAP 50'. Both items have an 'Include' checkbox checked. The 'Contract No.' is T00000009. The background window shows the 'Order Number' 0000388, 'Order Date' 5/30/2017, 'Order Type' Standard Order, and 'Customer No.' 01-ABF. The 'Contract No.' 000000198 is also visible in the background window.

Item Code	Description	Orderd	Amount	Include
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	1	150	<input checked="" type="checkbox"/>
2480-8-50	DESK FILE 8" CAP 50	2	2500	<input checked="" type="checkbox"/>

	Item Code	Item Contract	Create Contract	Ordered	Unit Price	Extension	Starting Date	Ending Date
1	1001-HON-H252	000000198	<input checked="" type="checkbox"/>	1.00	150.00	150.00	5/30/2017	5/29/2027
2	2480-8-50	000000198	<input checked="" type="checkbox"/>	2.00	2,500.00	5,000.00	5/30/2017	5/29/2027
3			<input type="checkbox"/>	.00	.00	.00		

Gen. Mult. Contr. ☐
 Contract Bill Item ☐
 Ship Date 5/30/2017
 Task No.
 Dispatch No.

Total Amount 5,150.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

The **Starting Date** and **Ending Date** for each Sales Order line Item is calculated based on the Order Date and the Starting-Ending dates interval from Template Contract. So if the Contract duration for an Item was 10 year in the Template Contract the Starting- Ending Dates in the Sales Order will be set so that to have the same 10 year duration. In our example the Starting Date in the Template Contract was 5/27/2009 and ending Date was 5/26/2019. After the line is loaded in the Sales Order its Starting Date is set equal to Order Date: 5/30/2017 and the Ending Date is set to 5/29/2027.

The Sales Order Header Contract is defaulted to the lines **Item Contract** field. The **Create Contract** check box allows for transferring lines into the Contract Items Maintenance during Daily Sales Update.

If the **Create Contract** checkbox is selected for an Item in the Sales Order lines, the Item will be added to respective Contract after the Sales Order is invoiced and the Sales Journal updated.

Here is the Contract items grid for the Contract created based on the Template Contract while entering the Sales Order:

S Contract Item Maintenance (SMD) 5/30/2017

Customer No. 01-ABF American Business Futures
Contract Number 000000198

Component... Labor/Skill... Quick Row 1

	Item Code	pt/Serial Num	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1			<input type="checkbox"/>	.00	.00			

Description
Coverage Code
Response Code
Ship To
Billing Freq.
PM Code

Accept Cancel Delete

There are no Contract items.

S/O Invoice Data Entry (SMD) 5/30/2017

Invoice No. 0100286 Batch 00044

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment

Quick Row 1

	Item Code	Item Contract	Ordered	Shipped	Unit Price	Extension
1	1001-HON-H252	000000198	1.00	1.00	150.000	150.00
2	2480-8-50	000000198	2.00	2.00	2,500.000	5,000.00
3			.00	.00	.000	.00

Contract Bill Item ☐

Ship Date 5/30/2017

Task No.

Dispatch No.

Contract No.

Total Amount 5,150.00

Quick Print Accept Cancel Delete

Here is the Contract populated with respective Items after the Invoice is updated:

Contract Item Maintenance (SMD) 5/30/2017

Customer No. 01-ABF American Business Futures

Contract Number 000000198

Component... Labor/Skill...

Quick Row 1

	Item Code	Item/Serial Num	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input type="checkbox"/>	1.00	150.00	5/30/2017	5/29/2027	
2	2480-8-50	JAN10	<input type="checkbox"/>	2.00	5,000.00	5/30/2017	5/29/2027	
3			<input type="checkbox"/>	.00	.00			

Description HON 2 DRAWER LETTER FLE W/O LK

Coverage Code

Response Code

Ship To

Billing Freq.

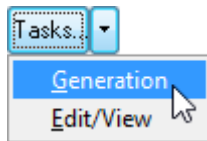
PM Code

Accept Cancel Delete

Task Generation from Sales Order

The following options are available for generating Tasks from Sales Order:

- Generate Task from Sales Order header by the Generate button under the Tasks menu button.



- Generate a Task (s) from Sales Order line for Special, Misc. Items and for a Bill Item

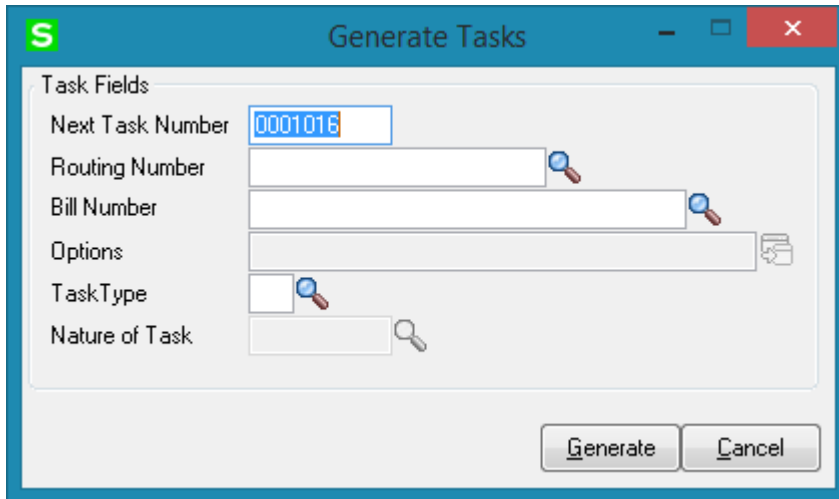
Press the **Generation** button to generate a Task for Sales Order Header.

 A screenshot of the 'Sales Order Entry (SMD) 5/30/2017' window. The 'Task...' button in the top right corner is highlighted, and a dropdown menu is open showing the 'Generation' button in blue. The window contains various fields for order information:

- Order Number: 0000390
- Order Date: 5/30/2017
- Order Type: Standard Order
- Customer: 01-ABF (American Business Futures)
- Ship Date: 5/30/2017
- Status: New
- Whse: 001 (EAST WAREHOUSE)
- Sales Tax Schedule: CA
- Ship To Addr: 2 (American Business Futures)
- Terms Code: 01 (Net 30 Days)
- Ship Via: SHIP PROD
- Confirm To: John Quinn
- E-mail: artie@abf.com
- Salesperson: 0100 (Jim Kentley)
- Split Comm: No

 At the bottom, there are buttons for 'Print Order...', 'Print Pick...', 'Recalc Price', 'Accept', 'Cancel', and 'Delete'.

The **Generate Tasks** screen is opened. When generating Task for Sales Order Header the Routing and Bill Number fields can be left blank. If the **Routing Number** is specified, tasks will be generated for those steps of that routing, which have the **Generate Task** checked in the **Routing Maintenance**.

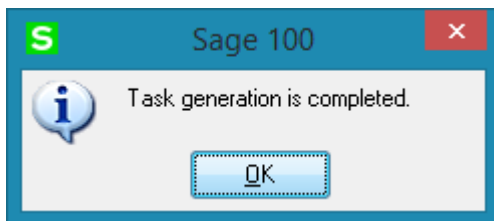


The 'Generate Tasks' dialog box contains the following fields:

- Task Fields
- Next Task Number: 0001016
- Routing Number: [empty]
- Bill Number: [empty]
- Options: [empty]
- TaskType: [empty]
- Nature of Task: [empty]

Buttons: Generate, Cancel

Press Generate button:

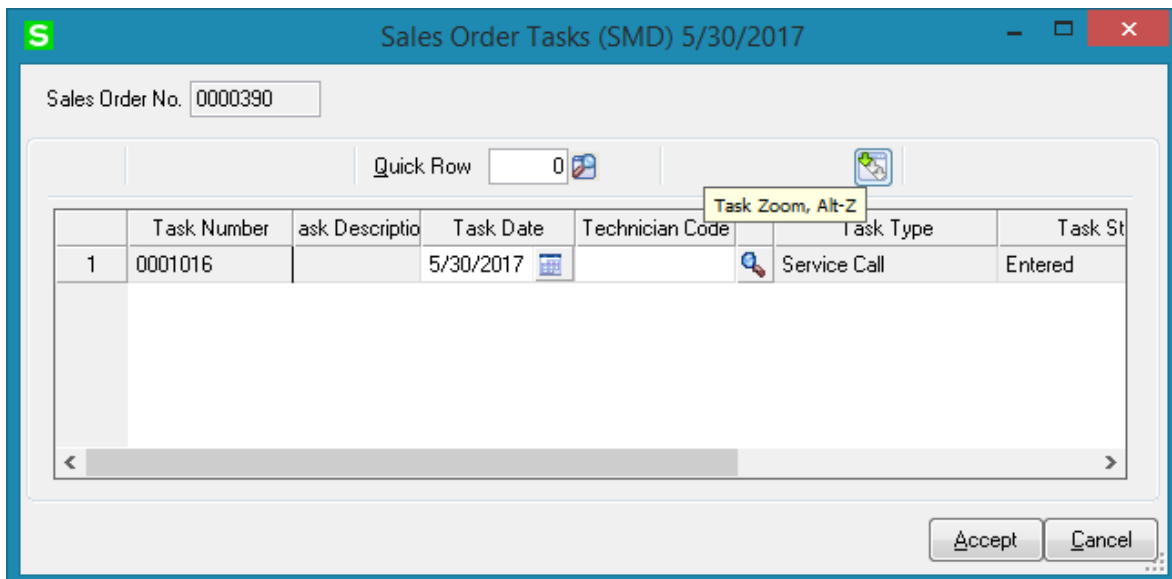


Sage 100

Task generation is completed.

OK

You can view the generated Task(s) by the **Edit/View** button:



Sales Order No. 0000390

Quick Row 0

	Task Number	Task Description	Task Date	Technician Code	Task Type	Task Status
1	0001016		5/30/2017		Service Call	Entered

Buttons: Accept, Cancel

Task Zoom, Alt-Z

The Task Zoom button allows for drill down to Task Data Entry:

Task Data Entry (SMD) 5/30/2017

Task No. 0001016

1. Header | 2. Address | 3. Dispatches | 4. Payment | User useriig

Task Date 5/30/2017 Task Time 04:55 PM Task Type S Service Call

Customer No. 01-ABF American Business Futures

Deposit Payment Type NONE Task Total .00 Tax .00

Task Status E Entered Salesperson 0100 Jim Kentley

Contract No.

Job Site Code 2 American Business Futures

Job Site Contact John Quinn

Nature of Task

Preferred Tech

Preferred Mach

Item Number

Lot/Serial No.

Tax Schedule CA California Territory ARIZON Region Arizona

Default Misc Item ADAMINSTALL Installation Services

Sales Order No. 0000390

Cust PO

Priority Code

Bill Freq Code 1

Route StopNo 0

Response

Coverage

Quote Amount .00

Scheduled Date 5/30/2017 Time 04:55 PM

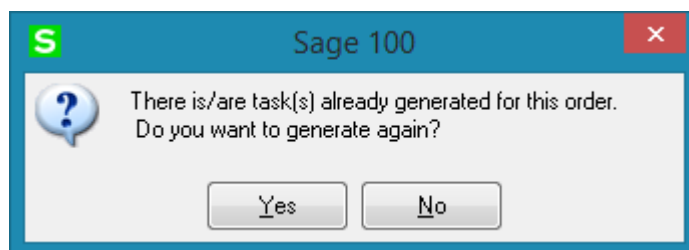
Due Date 5/30/2017 Time 04:55 PM

Quote Hours .00 Disp

Documents Path \\GOHAR\d\MAS\MAS2017\SMP\MAS90\Documents\SMD\Tasks\0001016

Quick Print BMA Copy From... Quick Email Text Message Accept Cancel Delete

Once a task has been generated for Sales Order Header the following message will appear when trying to generate another Task from the Sales Order header:



Upon selecting Yes a new Task will be generated for the Sales Order Header.

On the **Lines** tab, tasks generation is available only for order lines with Miscellaneous, Special and Bill Items.

The **Task Generation** button is enabled only if the selected line contains Misc Item, Special Item or Bill Item.

1. Generating task for Misc or Special Item

Order Number 0000390

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment | User useriig

Quick Row 2

	Item Code	Ordered	ack Order	Unit Price	Extension	Starting Date	Ending Date	Comm
1	1001-HON-H252	2.00	.00	84.000	168.00			
2	1001-HON-H252	1.00	.00	21.000	21.00			
3		.00	.00	.000	.00			

Task Generation

Warehouse

Unit Of Measure EACH

Shipped .00

Item Contract

Create Contract ☐

Total Amount 189.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

Press the **Task Generation** button to open the Generate Tasks screen. The Routing Number or Bill Number is required when Task is generated from SO line.

Sage 100

Please select Routing Number or Bill Number.

OK

Select a Routing Number or a Bill Number:

Generate Tasks

Task Fields

Next Task Number: 0001017

Routing Number: DOOR INSTALLATION

Bill Number:

Options:

Generate Cancel

When the **Routing Number** is specified, tasks are generated for the steps of the routing with the **Generate Task** checkbox selected in the **Routing Maintenance**. Here are the Tasks generated for the selected Routing number:

Sales Order Tasks (SMD) 5/30/2017

Sales Order No. 0000390

Quick Row 0

	Task Number	Task Date	Technician	Task Type	Task Status	Rate Of	Note	Hours	Amount	Dispatch	Generated From
1	0001016	5/30/2017		Service Call	Entered			.00	.00	<input type="checkbox"/>	Header
2	0001017	5/30/2017		Installation	Entered			.00	.00	<input type="checkbox"/>	Line 2
3	0001018	5/30/2017		Service Call	Entered			.00	.00	<input type="checkbox"/>	Line 2
4	0001019	5/30/2017		Manufacturing	Entered			.00	.00	<input type="checkbox"/>	Line 2
5	0001020	5/30/2017		Service Call	Entered			.00	.00	<input type="checkbox"/>	Line 2
6	0001021	5/30/2017		Manufacturing	Entered			.00	.00	<input type="checkbox"/>	Line 2

Accept Cancel

- Task Generation for a Bill Item (available if the **Present Sales Kit as a Set of Regular Items** option is turned off in the **Service Management Options**):

Order Number: 0000390

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Payment | User: useriig

	Item Code	Ordered	ack Order	Unit Price	Extension	Starting Date	Ending Date	Comm
1	1001-HON-H252	2.00	.00	84.000	168.00			
2	/MAKING-DIXT	1.00	.00	21.000	21.00			
3	BEL2500	1.00	.00	600.000	600.00			
4		.00	.00	.000	.00			

Quick Row: 3

Bill Options, Alt-B

Description	POS Terminal
Warehouse	001
Unit Of Measure	EACH
Shipped	.00
Item Contract	

Total Amount: 789.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

If the selected Bill Number has options, the **Options Selection** screen will be displayed, where you can change options.

The **Generate Tasks** screen is opened with the Bill number selected and disabled:

Generate Tasks

Task Fields

Next Task Number: 0001023

Routing Number:

Bill Number: BEL2500

Options: 01,Y

Generate Cancel

For the steps having **Mfg** checkbox selected in the Routing Maintenance Dispatches will be automatically created under the Task. If in the Miscellaneous Item Maintenance there is Miscellaneous Charge type Item setup that matches the Labor Code, a Labor Charge line

will be added for the Step of the Routing having that **Labor Code and Technician** specified.

If there is Routing Number (with respective steps for Task generation) assigned to the Bill Option Code additional tasks are generated for that option code by the same logic.

Sales Order Tasks (SMD) 5/30/2017

Sales Order No. 0000390

Quick Row 0

	Task Number	Task Status	Nature Of Task	Quote Hours	Quote Amount	Dispatch	Generated From
6	0001021	Entered	SEWING	.00	.00	<input type="checkbox"/>	Line 2
7	0001022	Entered		.00	.00	<input type="checkbox"/>	Line 2
8	0001023	Entered		.00	.00	<input type="checkbox"/>	Line 3
9	0001024	Entered		.00	.00	<input checked="" type="checkbox"/>	Line 3
10	0001025	Entered		.00	.00	<input type="checkbox"/>	Line 3

Accept Cancel

Here is an example of Manufacturing Dispatch generated for the selected Bill number:

Task Data Entry (SMD) 5/30/2017

Task No. 0001024

Assembly Unit

1. Header | 2. Address | 3. Dispatches | 4. Payment | User: useriig

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	5/30/2017	WILL	Williams Allen	Open

Quick Print BMA Copy From... Quick Email Text Message

Accept Cancel Delete

The Bill Item is exploded in the generated Dispatch:

Dispatch Data Entry (SMD) 5/30/2017

Task No. 0001024 Assembly Unit

Dispatch No. 0001

User useriig

1. Header | 2. Lines | 3. Payment

Quick Row 1

	Item Code	Ordered	Unit Price	Extension	Comment
1	BEL2500	1.00	600.000	600.00	
2	4886-18-14-3	1.00	45.000	45.00	
3	6655	2.00	179.000	358.00	
4		.00	.000	.00	

Description POS Terminal

Warehouse 001

Unit Of Measure EACH

Price Level 1

Total Amount 1,003.00

Quick Print BMA Manufacturing Labor Accept Cancel Delete

Production Generation when Closing Manufacturing Dispatch

When Manufacturing Dispatch is Closed, the program generates Production with the Bill number and Quantity loaded. The Production Generation screen is popup upon closing Manufacturing Dispatch:

Production Generation

Quantity Produced 1.00

OK

B/M Production Entry Batch

Batch Number: 00004

Comment:

Private Batch: ☐

Status: Available

Created By:

Entries: 0

Modified By:

Buttons: Accept, Cancel, Delete, ?

Production Entry (SMD) 5/30/2017

Production Number: 0000005

Batch: 00004

Production Date: 5/30/2017

Bill Number: BEL2500

Bill Type: Standard

Revision: 000

Option Code:

Quantity: 1.00

Unit of Measure: EACH

Parent Warehouse: 001 EAST WAREHOUSE

Component Warehouse: 001 EAST WAREHOUSE

Explode Sub-Assemblies: ☐

Buttons: Accept, Cancel, Delete, ?

Specify the **Lot/Serial Number**, if the Bill number represents a Lot/Serial Item, then go to the **Lines** tab, make distribution for Lot/Serial items, if any, and finish creating Production entry with the **Accept** button.

If Production is generated for a Bill **Number** with Lot/Serial component the Quantity/Bill is set to 0. The **Comment** field indicates the Extended Quantity, which the user may enter and distribute manually.

No **Sales Order** or **Invoice** is generated for **Manufacturing Dispatches** during Dispatch Closing.

S/O Invoice Data Entry

Enter the **Contract Number** to sell items against that contract. Any existing contract can be selected using the **Lookup** button (the Template contracts are not displayed in the lookup).

The screenshot displays the 'S/O Invoice Data Entry (SMD) 6/22/2016' window. At the top, there's a title bar with a green 'S' icon and window controls. Below it, a navigation bar shows tabs: 1. Header, 2. Address, 3. Lines, 4. Totals, 5. Credit Card. The main form area contains several sections: Invoice information (Invoice No. INV0632, Batch 00048, Invoice Date 6/22/2016, Invoice Type Standard Invoice, Sales Order Number), Customer information (Customer No. 01-AVNET, Contract No. 000000202, Multi Contract checkbox, Cust PO), Order details (Order Status 1 Step, Ship Date 6/22/2016, Due Date 6/22/2016, Discount Date 6/22/2016, Warehouse 001, EAST WAREHOUSE, Sales Tax CA, California), and Shipping/Contact information (Apply to Inv No., Ship To Addr 1, Terms Code 00, Ship Via FOB, Confirm To, E-mail, Fax No., Comment, Salesperson 0200, Shelly Westland, Split Comm. No, Split Comm... button). There are also buttons for Defaults..., Customer..., Credit..., Quick Print, Accept, Cancel, Delete, and a help icon.

If the **Item Contract** instead of **Order Contract** box is selected in the **Service Management Options**, the contract set for the item in the **Inventory Maintenance** program will be used instead of the Sales Order (or Invoice) header Contract when generating new contract during invoice update. This logic is applicable if the **Allow Transfer Lines from Template Contract to Sales Order** checkbox is not selected in the **Sales Order Options**.

The **Create Contract**, **Generate Multiple Contracts**, and **Item Contract** fields work similar to the corresponding fields in the Sales Order Entry program.

S/O Invoice Data Entry (SMD) 6/22/2016

Invoice No. INV0632 Batch 00048

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card

Quick Row 1

	Item Code	Ordered	Shipped	Unit Price	Extension	Comment
1	1001-HON-H252	2.00	2.00	84.000	168.00	
2		.00	.00	.000	.00	

Create Contract ☒
Gen. Mult. Contr. ☐
Contract Bill Item ☐
Item Contract 000000191
Ship Date 6/22/2016

Total Amount 168.00

Quick Print Accept Cancel Delete

Return Merchandise Authorization

RMA Entry

The **Contract No.** field with its **Contract Memo** has been added to the **Header** tab of **RMA Entry** screen. The user may select an existing Contract or just create a new Contract during Return Entry.

The screenshot shows the 'RMA Entry (SMD) 6/22/2016' window. The 'Header' tab is selected, displaying various fields for RMA entry. The 'Contract No.' field is highlighted, and a tooltip 'Next Contract No., Alt W' is visible. The 'Return Via' field is set to 'MAIL', and the 'Return To' field is set to '0000'. The 'RMA Status' is 'New', and the 'Expire Date' is '7/22/2016'. The 'Ship To', 'Confirm To', and 'Comment' fields are empty. The 'E-mail' and 'Fax No.' fields are also empty. The 'Batch Fax' checkbox is unchecked. The checkboxes for 'Inspect on Receipt', 'Cross Ship', 'Apply Restocking Charges', 'Print Customer RMA', and 'Print RMA Receiver' are all checked. The bottom of the window contains buttons for 'Quick Print...', 'Express Sales Order...', 'Accept', 'Cancel', 'Delete', and a printer icon.

Upon pressing the Next Contract button the Template Contract Number List is opened allowing the user to select a template and create new Contract based on it.

S Template Contract Number List

Contract No.	Customer No	Bill To Name	Contract Description
T00000006	02-CUSTOM	Custom Craft Products	Install
T00000007	01-ABF	Orange Door & Window Co.	POS Terminal Warranty
T00000008	02-ATOZ	A To Z Carpet Supply	Door Installation template Con
T00000009	01-ABF	American Business Futures	Preventive Maintenance Contrac
T00000010	01-ABF	Orange Door & Window Co.	POS Terminal Warranty

Search Contract No. Begins with Find

Filters...

Custom... Lookup Wizard... Select Cancel

Found 5 records

If the new Contract is created based on the Template Contract with Contract Items, those Items are loaded into the newly created Contract:

S Contract Item Maintenance (SMD) 6/22/2016

Customer No. 01-ABF American Business Futures
Contract Number 000000212

Component... Labor/Skill... Quick Row 1

	Item Code	Lot/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date
1	1001-HON-H254		<input type="checkbox"/>	1.00	130.00	6/22/2017	6/21/2022
2	6655		<input type="checkbox"/>	2.00	170.00	6/22/2017	6/21/2022
3	GB-EL04MS-07		<input type="checkbox"/>	5.00	10.00	6/22/2017	6/21/2022
4			<input type="checkbox"/>	.00	.00		

Description HON 4 DRAWER LETTER FLE W/O LK
Coverage Code
Response Code
Ship To
Billing Freq.
PM Code

Accept Cancel Delete

When generating express Sales Order from RMA Entry, the Contract Number selected on the RMA Header is transferred to the generated Sales Order:

Sales Order Entry (SMD) 6/22/2016

Order Number: 0000397 | Copy From... | Defaults... | Customer... | Credit... | Tasks...

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | User: useriig

Order Date: 6/22/2016 | Order Type: Standard Order | RMA Number: 0000036

Customer No.: 01-ABF | American Business Futures
Cust PO:
Contract No.: 000000212 | POS Terminal Warranty | Installation Order: ☐ Management

Ship Date: 6/22/2016
Status: New | Reason:
Whse: 001 | EAST WAREHOUSE
Sales Tax: CA
Schedule: California

Ship To Addr: 2 | American Business Futures
Terms Code: 01 | Net 30 Days
Ship Via: UPS BLUE | FOB:
Confirm To: John Quinn
E-mail: John@yahoo.com
Fax No.: | Batch Fax: ☐
Comment: Call Ed for credit approval.
Salesperson: 0100 | Jim Kentley
Split Comm.: No | Split Comm...

Print Order: ☒
Print Pick Sheets: ☒
No. of Ship Labels: 1
Quick Print Without Displaying Printing Window: ☐ | Docs Path:
Print Order... | Print Pick... | Recalc Price | Accept | Cancel | Delete

RMA Receipts Entry

The **Contract No.** field with its **Contract Memo** has been added to the **Header** tab of **RMA Receipts Entry** screen:

The screenshot shows the 'RMA Entry (SMD) 5/30/2017' window. The 'Header' tab is active, displaying various fields for RMA entry. The 'RMA Number' is 0000036. The 'RMA Date' is 5/30/2017. The 'Customer No.' is 01-ABF, and the 'Contract No.' is 000000191. The 'RMA Status' is 'New' and the 'Expire Date' is 6/29/2017. The 'Return Via' is 'MAIL' and the 'Return To' is 0000. The 'Ship To' is 2, 'Confirm To' is John Quinn, and the 'Comment' is 'Call Ed for credit approval.'. The 'E-mail' is artie@abf.com and the 'Fax No.' is empty. There are checkboxes for 'Inspect on Receipt', 'Cross Ship', 'Apply Restocking Charges', 'Print Customer RMA', and 'Print RMA Receiver'. The bottom of the window has buttons for 'Quick Print...', 'Express Sales Order...', 'Accept', 'Cancel', 'Delete', and a printer icon.

The user can select a **Contract No** from the Contract lookup list while entering RMA Receipt.

While generating transactions the Contract number is transferred to the generated sales documents: Sales Order and Credit Memo type Invoice.

Job Cost Integration

Job Maintenance

The **Contract No.** field on the **Job Maintenance** screen represents the S/M **Contract No.**

Job Maintenance (SMD) 1/30/2018

Job No. SMD1150 [Search] [Previous] [Next] [Print]

Description Abf-17th Floor Buildout

Copy From... Renumber... Cost Code...

1. Main | 2. Status | 3. Change Orders | 4. Billing History

Customer No. 01-ABF [Search] [Calendar] American Business Futures

Job Address [Text Field] [Map]

ZIP Code [Text Field]

City [Text Field] State [Text Field]

Country [Text Field] [Search]

Contact Artie Johnson [Search]

Telephone (414) 655-4787 Ext. 219

Fax [Text Field]

E-mail Address [Text Field] [Email Icon]

Comment [Text Field]

Estimator MILLER Manager ELLIOTT

Calculate Sales Tax ☐

Job Status Open [Dropdown]

Status Date 8/24/2004 [Calendar]

Estimated Start Date 8/25/2004 [Calendar]

Estimated Completion Date 8/26/2005 [Calendar]

Actual Start Date 8/30/2004 [Calendar]

Job Type 000 [Search] STANDARD JOB TYPE

Acct Method Percentage of Completion [Dropdown]

Billing Method Fixed [Dropdown] Retention 5.00%

SORT FIELD GENERAL [Text Field]

Retain Transaction Detail ☒

Unit of Measure SQUARE FT

Total SQUARE FT 15 [Text Field]

Contract No. 000000031 [Search] [Calendar] Installation of software Phase

Accept Cancel Delete [Print] [Help]

When entering a **Job**, you can select a Contract from the Contract Number lookup.
When a contract is selected in the **Contract No.** field, click the Contract hyperlink to open the selected contract.

S Contract Data Entry (SMD) 1/30/2018

Contract No. 000000031 NTC NBT nstallation of software Phase Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Contract Date 1/30/2018

Customer No. 01-ABF American Business Futures

Contract Type Service
Contract Status New
Start Date 1/30/2018
End Date 1/30/2018
Billing Type Time and Material

Job Site Code 2 American Business Futures
Confirm To John Quinn
Comment Job Number - SMD1150
Fax No.
E-mail artie@abf.com

Generation
Document None
Contract Amount From Items
Bill Freq Code 1

Tech.

All Materials Are Covered ☐
All Labors Are Covered ☐

Contract Items

PM Code
Number of Days 0 Last Task Gen. Date
TaskType
Nature of Task
Total Fixed Hours 0 Used Hours 0:00
Documents Path \\ARPINE\d\Mas2017\SMP\PU1\MAS90\D

Route

Total Amount .00

Quick Print Generation Copy From... Accept Cancel Delete

You can select any existing Contract from the lookup.

Cost Code Maintenance

The **S/M Job Code** field has been added on the **Cost Code Maintenance** screen under the **Job Cost Setup** menu.

Cost Code Maintenance (SMD) 1/30/2018

Cost Code: 400-050-000 Description: Installation - Concrete Coring Apply...

S/M Job Code: 500-000-000 Installation Labor

1. Main 2. Expense Acct

Cost Type	Description	Active	UM	Pricing Method	Completion Method	Unit Cost	Billing Rate
B	Burden	<input type="checkbox"/>				.000	.00 %
E	Equipment	<input checked="" type="checkbox"/>	HOUR	Non-Billable	Cost	.000	.00 %
L	Labor	<input checked="" type="checkbox"/>	HOUR	Non-Billable	Units	25.000	.00 %
M	Material	<input checked="" type="checkbox"/>	FEET	Non-Billable	Cost	50.000	.00 %
O	Overhead	<input type="checkbox"/>				.000	.00 %
S	Subcontract	<input checked="" type="checkbox"/>		Non-Billable	Cost	.000	.00 %

Accept Cancel Delete [Print] [Help]

Click the **S/M Job Code** hyperlink to open the **Job Code Maintenance**:

Job Code Maintenance (SMD) ...

Job Code: 500-000-000 Description: Installation Labor

Accept Cancel Delete [Print] [Help]

A/P Invoice Data Entry

The **Contract No.** field has been added to the **A/P Invoice Data Entry Header** screen. This Contract will be used as default for the invoice lines entered for Job Numbers not having S/M Contract specified.

The screenshot shows the 'A/P Invoice Data Entry (SMD) 1/30/2018' window. It features a header section with fields for Vendor No. (01-AIRWAY), Name (Airway Property), and Invoice No. (INV#062216). Below this are tabs for '1. Header' and '2. Lines'. The main area contains several input fields: Invoice Date (1/30/2018), Invoice Amount (200.00), Subject to Discount (200.00), Prepaid Invoice, Terms Code (03 NET END OF MONTH), Invoice Due Date (1/30/2018), Discount Due Date, Discount Amount (.00), Contract No. (000000031), Hold Payment, Separate Check, Comment, 1099 Payment Form (None), and Box. The Contract No. field is highlighted with a blue box. At the bottom, there are buttons for Accept, Cancel, Delete, and a help icon.

The **Contract Memo** button has been added near the **Contract No.** field to allow entering Memo for current Vendor.

The lines can be displayed either with GLs or with JC (dependent which one of Integrate with **General Ledger** or **Job Cost** check boxes is selected in the **Accounts Payable Options**).

The **Contract Number** and **Job Code** fields have been added to the Lines tab. If **Job Cost** is selected in the **Accounts Payable Options**, the **A/P Invoice Data Entry** screen is displayed as follows:

A/P Invoice Data Entry (SMD) 1/30/2018

Vendor No. 01-AIRWAY
 Name Airway Property
 Invoice No. 01292018

1. Header | 2. Lines

Quick Row 1

	Job Number	Cost Code	Type	Unit Cost	Units	Amount	Co
1	SMD1150	400-050-000	Labor	50.000	4.00	200.00	
2				.000	.00	.00	

Contract Number 000000031
 Job Code 500-000-000

Distribution Balance 0.00 Total 200.00

Accept Cancel Delete





Contract Number and **Job Code** fields are available also in the A/P invoice Crystal Report work file.

Cost information of invoice line is stored on the **S/M Contract** specified on the **Job Number** and **S/M Job Code** specified on the **Cost Code** selected for that line.



If the invoice line's **Job Number** does not have **S/M Contract** specified, default values of the Invoice **Header** will be used.

If **Integrate with General Ledger** option is enabled in the **Accounts Payable Options**, the **A/P Invoice Data Entry** screen is displayed as follows:


S A/P Invoice Data Entry (SMD) 1/30/2018


Vendor No. 01-AIRWAY     Vendor...


Name Airway Property

Invoice No. 123456  

1. Header | 2. Lines




Quick Row 1 

	G/L Account	Amount	Comment
1	555-00-0300 	200.00	
2		.00	

Contract Number 000000031 

Job Code 500-000-000

Distribution Balance 0.00 Total 200.00

 Accept Cancel Delete  

After **AP Invoice Register** is updated respective Job Code transaction information is displayed on the JC History tab to the Contract.

S Contract Data Entry (SMD) 1/30/2018

Contract No. 000000031 NTC NBT Installation of software Phase Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History | 6. Transactions | 7. Unearned

Job Code 500-000-000 Installation Labor

Period	Ending	Quantity Postings	Cost Billed	Dollars Billed
01	Jan 31	4.00	.00	200.00
02	Feb 28	.00	.00	.00
03	Mar 31	.00	.00	.00
04	Apr 30	.00	.00	.00
05	May 31	.00	.00	.00
06	June 30	.00	.00	.00
07	July 31	.00	.00	.00
08	Aug 31	.00	.00	.00
09	Sept 30	.00	.00	.00
10	Oct 31	.00	.00	.00
11	Nov 30	.00	.00	.00
12	Dec 31	.00	.00	.00
	Total	4.00	.00	200.00

2018

J.C. Totals
Year Totals

Quick Print Generation Copy From... Accept Cancel Delete

Click the **Transaction Zoom** drill down button to view the details of Job Code Transaction.

Job Code Transaction Inquiry

Job Code: 500-000-000 Year: 2018 Period: 01

Transaction Date	Type	Ref No.	Item Code	G/L Account	Quantity
1/30/2018	AP	01292018		140-01-0000	4.00-

OK

Job Inquiry

The **Contract No.** field on the **Job Inquiry** screen displays the S/M **Contract No.** field.

Job Inquiry (SMD) 1/30/2018

Job No. SMD1150 Cost Code...

Description: Abf-17th Floor Buildout

1. Main 2. Status 3. Change Orders 4. Billing History

Customer No. 01-ABF American Business Futures

Job Address: _____

ZIP Code: _____

City: _____ State: _____

Country: _____

Contact: Artie Johnson

Telephone: (414) 655-4787 Ext: 219

Fax: _____

E-mail Address: _____

Comment: _____

Estimator: MILLER Manager: ELLIOTT

Calculate Sales Tax: ☐

Job Status: Open

Status Date: 8/24/2004

Estimated Start Date: 8/25/2004

Estimated Completion Date: 8/26/2005

Actual Start Date: 8/30/2004

Job Type: 000 STANDARD JOB TYPE

Acct Method: Percentage of Completion

Billing Method: Fixed Retention: 5.00%

Sort Field: GENERAL

Retain Transaction Detail: ☒

Unit of Measure: SQUARE FT

Total SQUARE FT: 15

Contract No. 000000031 Installation of software Phase

OK Print Help

Job Posting Entry

The **Import** button has been added to the **Job Posting Entry** screen. To enable this button, select **Direct Cost** as **Posting type** and **Credit G/L Account** number.

Job Posting Entry (SMD) 1/30/2018

Posting Type: Direct Cost

Entry Number: 0000020

Credit Account: 200-02-0000 Accounts payable - other

	Job Number	Cost Code	Cost Type	G/L Account	Unit Cost	Quantity
1					.000	.00

Quick Row: 1

Job Description

Cost Code Desc

Account Desc

Vendor Number

Total: .00

Import Accept Cancel Delete

Click the **Import** button. The **Import Dispatch Lines** screen will be displayed, where it is possible to specify the selection criteria: range of customer numbers, contract numbers, task and dispatch numbers, dates, and labor codes.

Select Field	Operand	Value
Customer Number	All	
Contract No.	Equal to	000000031
Task No.	All	
Dispatch No.	All	
Dispatch Date	All	
Labor Code	All	

Proceed Cancel

After making the selection and clicking **Proceed** button, the Service Management information (Customer, Contract, Task, Dispatch, Date and Labor information) will be processed and loaded as **Job Posting Entry** lines.

Posting Type: Direct Cost
 Entry Number: 0000023
 Credit Account: 200-02-0000 Accounts payable - other

	Job Number	Cost Code	Cost Type	G/L Account	Unit Cost	Quantity	Amount	Comment
1	SMD1150	400-050-00	Material	150-01-0000	20.000	2.25	45.00	0000978/0001/ADAM
2	SMD1150	500-020-000	Material	150-01-0000	20.000	2.00	40.00	0000978/0001/ADAM
3					.000	.00	0.00	

Job Description: Abf-17th Floor Buildout
 Cost Code Desc: Installation - Concrete Coring
 Account Desc: Labor
 Vendor Number: 01-100-10010

Total: 85.00

Import Accept Cancel Delete

The **Unit Cost** is set to the **Labor Cost** (for a given technician) entered in the **Technician Code Maintenance**, and the **Units** is set to the **Hours Spent** of the line.

When substituted Cost Code doesn't exist, the **Cost Type** will be grayed out and **U/M** will be set to **L** (Labor).

The **Cost Type** is set to **Material**, if it is **Active** for the substitute **Cost Code**.

If the **Post to G/L for Work in Process** option is not selected in the **Job Cost Options**, and there is **G/L Account** specified for the **Material Cost Type** of the substitute **Cost Code**, it will be set for the imported line.

If there is no **G/L Account** specified for the **Material Cost Type** of the substitute **Cost Code**, the **Def G/L Acct for Job Posting Entry** specified in the **Service Management Options** will be used.

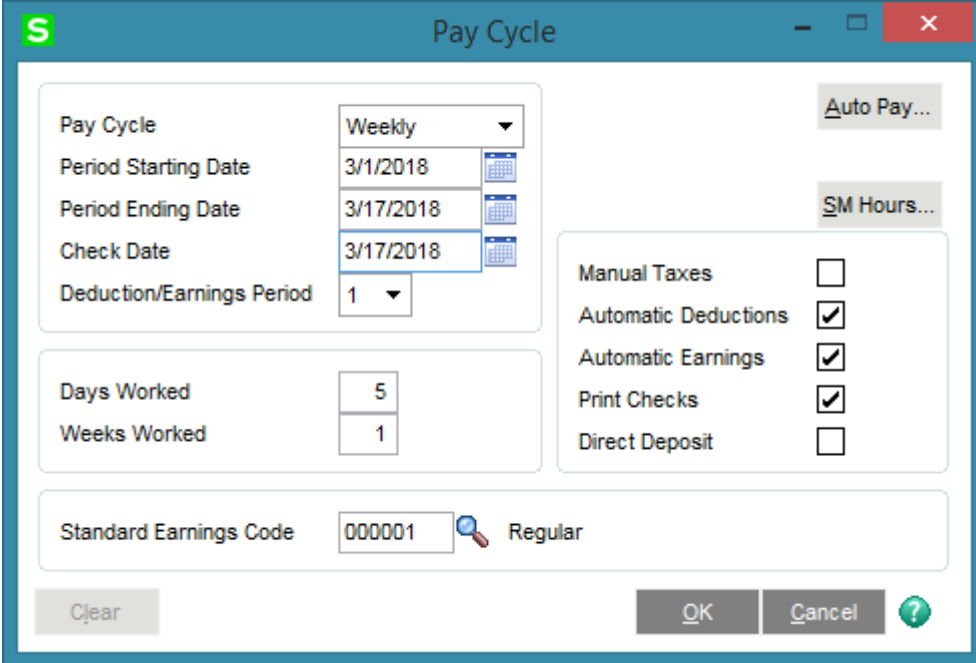
If the **Post to G/L for Work in Process** option is selected in the **Job Cost Options**, the **Def G/L Acct for Job Posting Entry** will be used.

If the substituted **Job** is **Closed**, Dispatch will not be imported.

Payroll Integration

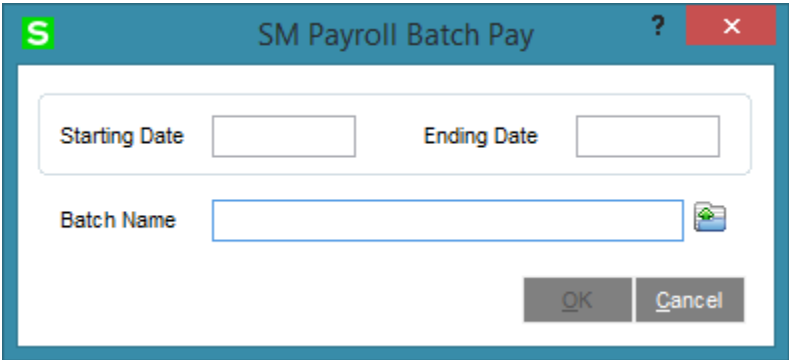
Payroll Data Entry

Select **Payroll Data Entry** under the **Payroll Main** menu. The **Pay Cycle** screen is opened.

The screenshot shows a software window titled "Pay Cycle" with a green "S" icon in the top-left corner. The window contains several input fields and checkboxes. On the left, there is a section for "Pay Cycle" with a dropdown menu set to "Weekly". Below this are fields for "Period Starting Date" (3/1/2018), "Period Ending Date" (3/17/2018), "Check Date" (3/17/2018), and "Deduction/Earnings Period" (1). To the right of these fields are buttons for "Auto Pay..." and "SM Hours...". Below the date fields are input boxes for "Days Worked" (5) and "Weeks Worked" (1). On the right side of the window, there is a list of checkboxes: "Manual Taxes" (unchecked), "Automatic Deductions" (checked), "Automatic Earnings" (checked), "Print Checks" (checked), and "Direct Deposit" (unchecked). At the bottom, there is a "Standard Earnings Code" field with the value "000001" and a magnifying glass icon, followed by the text "Regular". At the very bottom are "Clear", "OK", "Cancel", and a help icon (question mark in a circle).

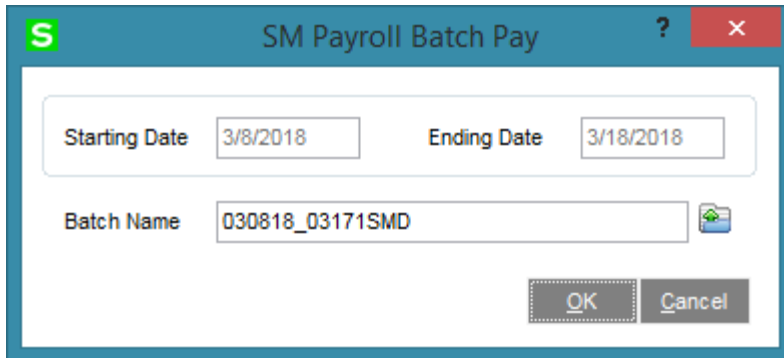
Select **Weekly** in the **Pay Cycle** field and click the **SM Hours** button.

This feature allows user to fill in the hours from the **Payroll Batch** entered in the **Service Management** module. (See the [Payroll Batch Entry](#) section in this manual.)

The screenshot shows a software window titled "SM Payroll Batch Pay" with a green "S" icon in the top-left corner and a question mark icon in the top-right corner. The window contains three input fields: "Starting Date", "Ending Date", and "Batch Name". Below the "Batch Name" field is a small icon of a document with a green checkmark. At the bottom of the window are "OK" and "Cancel" buttons.

Click the **Open Batch** button.

Select the batch created in the **Payroll Batch Entry**.



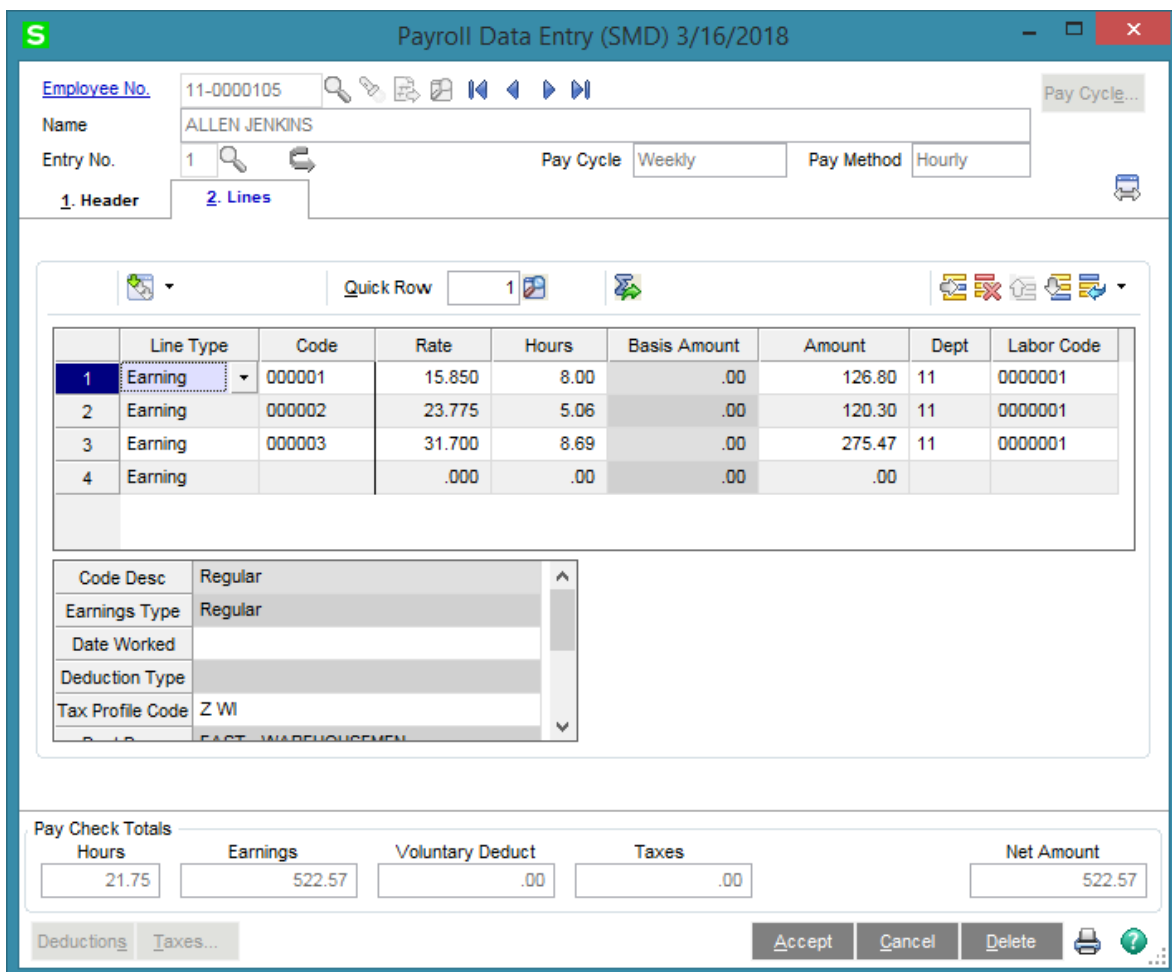
SM Payroll Batch Pay

Starting Date: 3/8/2018 Ending Date: 3/18/2018

Batch Name: 030818_03171SMD

OK Cancel

Click **OK** to generate **Payroll Data Entries** for the Employees in the batch.



Payroll Data Entry (SMD) 3/16/2018

Employee No.: 11-0000105 Name: ALLEN JENKINS

Entry No.: 1 Pay Cycle: Weekly Pay Method: Hourly

1. Header 2. Lines

Line	Type	Code	Rate	Hours	Basis Amount	Amount	Dept	Labor Code
1	Earning	000001	15.850	8.00	.00	126.80	11	0000001
2	Earning	000002	23.775	5.06	.00	120.30	11	0000001
3	Earning	000003	31.700	8.69	.00	275.47	11	0000001
4	Earning		.000	.00	.00	.00		

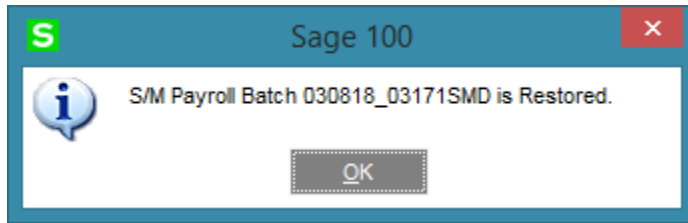
Code Desc: Regular
Earnings Type: Regular
Date Worked:
Deduction Type:
Tax Profile Code: Z WI
EMPLOYEE: EAST WAREHOUSEMEN

Pay Check Totals

Hours	Earnings	Voluntary Deduct	Taxes	Net Amount
21.75	522.57	.00	.00	522.57

Deductions Taxes... Accept Cancel Delete

If the generated Payroll Data Entries are **Cleared** in the **Pay Cycle** program (by the Clear button), corresponding batch (es) will be restored from the history.



If a Payroll Data Entry is deleted the same message appears and the record is restored in the S/M Payroll Batch.

Business Insights Explorer

A/R Explore

The **SM Contracts** and **SM Tasks** items have been added to the **Preview** and **Explore** navigation panes of the **AR Customer View** program.

Sage 100 Business Insights Explorer - Customer

File Edit View Data Preview Explore Tasks Tools Help

Back [Icons] Setting Standard [Icons]

Navigation Pane

Preview

- ☐ Customer Sales History by Period
- ☐ Customer Contacts
- ☐ Customer Memos
- ☐ Customer Payments
- ☐ History Invoices
- ☐ Open Invoices
- ☐ Repetitive Invoices
- ☐ Sales Orders
- ☐ Open RMAs
- ☐ RMA History
- ☒ **SM Contracts**
- ☐ SM Tasks

Select Preview Setting...

Preview

Explore

Tasks

Look For: Search In (All Columns) Find Next

Customer

Data Grid Chart

Drag a column header here to group by that column

Div	Customer	Name	Hold	Current Balance	Aging 1	Aging 2	Aging 3
01	ABF	American Business Futures	No	\$24,518.76	\$0.00	\$0.00	
01	AVNET	Avnet Processing Corp	No	\$7,217.72	\$0.00	\$0.00	
01	BRESLIN	Breslin Parts Supply	No	\$13,051.91	\$0.00	\$0.00	
01	DUKE	Duke University Medical Cen	No	\$5,072.37	\$0.00	\$0.00	
01	HILLSB	Hillsboro Service Center	No	\$2,871.92	\$0.00	\$0.00	
01	IIG	IIG	No	\$0.00	\$0.00	\$0.00	
01	RSSUPPL	R & S Supply Corp.	No	\$2,173.11	\$0.00	\$0.00	
01	SHEPARD	Shepard Motorworks	No	\$2,158.00	\$0.00	\$0.00	

<Filter is Empty> Filter Builder...

SM Contracts

Contract Number	Contract Date	Contract Description	Contract Start Date	Contract End Date	AR Division
000000014	2/26/2002	Building	2/26/2002	2/26/2018	01
000000018	2/26/2002	Furniture repairation	2/26/2002	4/10/2020	01
000000024	5/27/2016		5/27/2016	5/27/2016	01
000000040	11/20/2008	Shipping	5/26/2016	5/26/2018	01
000000174	2/14/2014	Installation Support	2/14/2014	2/14/2019	01
000000190	5/26/2016		5/26/2016	5/26/2017	01

Customer useriig SMD 18 rows 23 rows

Sage 100 Business Insights Explorer - Customer

File Edit View Data Preview Explore Tasks Tools Help

Back Standard

Navigation Pane

Explore

- Customer Sales History by Period
- Customer Payments
- History Invoices
- Open Invoices
- Repetitive Invoices
- Sales Orders
- Open RMAs
- RMA History
- SM Contracts**
 - Standard
 - Public
 - Private
- SM Tasks
 - Standard
 - Public
 - Private

Look For: Search In (All Columns) Find Next

Customer

Data Grid Chart

Drag a column header here to group by that column

Div	Customer	Name	Hold	Current Balance	Aging 1	Aging 2	Aging 3
01	ABF	American Business Futures	No	\$24,518.76	\$0.00	\$0.00	
01	AVNET	Avnet Processing Corp	No	\$7,217.72	\$0.00	\$0.00	
01	BRESLIN	Breslin Parts Supply	No	\$13,051.91	\$0.00	\$0.00	
01	DUKE	Duke University Medical Cen	No	\$5,072.37	\$0.00	\$0.00	
01	HILLSB	Hillsboro Service Center	No	\$2,871.92	\$0.00	\$0.00	
01	IIG	IIG	No	\$0.00	\$0.00	\$0.00	
01	RSSUPPL	R & S Supply Corp.	No	\$2,173.11	\$0.00	\$0.00	
01	SHEPARD	Shepard Motorworks	No	\$2,158.00	\$0.00	\$0.00	

<Filter is Empty> Filter Builder...

SM Contracts

Contract Num	Contract Date	Contract Description	Contract Start Date	Contract End Date	AR Divis
000000014	2/26/2002	Building	2/26/2002	2/26/2018	01
000000018	2/26/2002	Furniture repairation	2/26/2002	4/10/2020	01
000000024	5/27/2016		5/27/2016	5/27/2016	01
000000040	11/20/2008	Shipping	5/26/2016	5/26/2018	01
000000174	2/14/2014	Installation Support	2/14/2014	2/14/2019	01
000000190	5/26/2016		5/26/2016	5/26/2017	01

Customer useriig SMD 18 rows 23 rows

S/O Explore

The **Contract** column has been added to the main data view of the **Sales Orders View** and the **SM Tasks** menu has been added to the **Preview** and **Explore** navigation panes to allow displaying tasks generated from Sales Order.

The screenshot shows the Sage 100 Business Insights Explorer - Sales Orders application. The navigation pane on the left has 'SM Tasks' selected. The main data grid displays a list of sales orders with columns: Order, Order Date, Type, Div, Custome, Bill To Name, Status, and Contract Number. A filter is applied: '(Contract Number IS NOT blank)'. The 'SM Tasks' section below the data grid shows columns: Task Description, Task Type, Task Status, Contract Number, AR Division Number, and Customer Number.

Order	Order Date	Type	Div	Custome	Bill To Name	Status	Contract Number
0000172	02/26/2002	Standard	02	ATOZ	A To Z Carpet Supply	Open	000000004
Contract Number : 000000006 (5 Items)							
0000174	02/26/2002	Standard	02	ORANGE	Orange Door & Window	Open	000000006
0000187	06/14/2002	Back Order	02	ORANGE	Orange Door & Window	Open	000000006
0000253	02/25/2009	Standard	02	ORANGE	Orange Door & Window	New	000000006
0000326	09/10/2013	Standard	02	ORANGE	Orange Door & Window	New	000000006
0000329	09/10/2013	Standard	02	ORANGE	Orange Door & Window	New	000000006
Contract Number : 000000009 (1 Item)							

Filter: (Contract Number IS NOT blank)

Task Description	Task Type	Task Status	Contract Number	AR Division Number	Customer Number
No tasks to display					

Footer: Sales Orders | userlig | SMD | 75 rows | 0 rows

Sage 100 Business Insights Explorer - Sales Orders

File Edit View Data Preview Explore Tasks Tools Help

Navigation Pane

Preview

- ☐ Line Items
- ☐ Backorders
- ☐ Backordered Line Items
- ☐ Quotes
- ☐ Master Orders
- ☐ Repeating Orders
- ☐ History Orders
- ☐ History Invoices
- ☒ SM Tasks

Select Preview Setting...

Preview

Explore

Tasks

Look For: Search In (All Columns) Find Next

Sales Orders

Data Grid Chart

Drag a column header here to group by that column

Order	Order Date	Type	Div	Customer	Bill To Name	Status	Salesperson
0000385	06/22/2016	Standard	01	ABF	American Business Futures	New	Jim Kentle
0000388	06/22/2016	Standard	01	ABF	American Business Futures	New	Jim Kentle
0000389	06/22/2016	Standard	01	AVNET	Avnet Processing Corp	New	Shelly West
0000391	06/22/2016	Standard	01	AVNET	Avnet Processing Corp	New	Shelly West
0000393	06/22/2016	Standard	01	ABF	American Business Futures	New	Jim Kentle
0000394	06/22/2016	Standard	01	ABF	American Business Futures	New	Jim Kentle
0000395	06/22/2016	Standard	01	AVNET	Avnet Processing Corp	New	Shelly West
0000397	06/22/2016	Standard	01	ABF	American Business Futures	New	Jim Kentle

<Filter is Empty> Filter Builder...

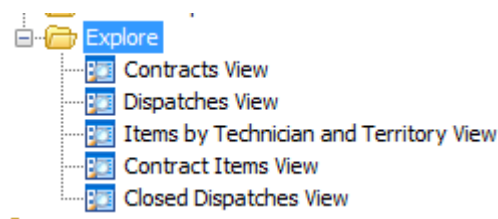
SM Tasks

Task Number	Task Date	Task Description	Task Type	Task Status	Contract Number	AR
0001017	6/22/2016		Installation	Entered		01
0001018	6/22/2016	Perform a Site Survey	Installation	Entered		01
0001019	6/22/2016	Check electrical	Installation	Entered		01
0001020	6/22/2016	Pull Products / Installation	Support Call	Entered		01
0001021	6/22/2016	Testing	Installation	Entered		01
0001022	6/22/2016	Deliever Door	Manufacturing	Entered		01

Sales Orders userlig SMD 148 rows 10 rows

S/M Explore

The **Explore** menu with **Contract View**, **Dispatch View**, **Items by Technician and Territory View**, **Contract Items View** and **Closed Dispatches View** have been added to the **Service Management** module.



The **Data View** grid is used to filter, sort, group, and summarize data. The columns can also be modified in the grid by showing and hiding columns, changing the column order, changing the column names, and formatting the data that appears in the columns. Changes to the Data View grid can be saved to a setting. The information in the Data View grid can also be printed and saved to a report.

The **Navigation pane** is used to explore data related to the selected view. The main groups on the Navigation pane are: **Explore**, **Preview**, and **Tasks**. In this pane select the **SM Tasks**, **SM Contract Details**, **Sales Order**, **History Invoices**, **SM Contract Job Code Posting** or **SM Contract Job Code Transaction** radio button to display corresponding data in the Preview pane.

The **Preview pane** is used to view related data from the Data View grid. The data in the Preview pane is filtered by the selected row in the Data View grid and by the option selected in the Preview group on the Navigation pane.

Sage 100 Business Insights Explorer - SM Contracts

File Edit View Data Preview Explore Tools Help

Back Setting Standard

Navigation Pane

Preview

☒ SM Tasks
☐ SM Contract Details
☐ Sales Orders
☐ History Invoices
☐ SM Contract Job Code Posting
☐ SM Contract Job Code Transaction

Look For: Search In (All Columns) Find Next

SM Contracts

Data Grid Chart

Drag a column header here to group by that column

Contract Number	Contract Date	Contract Description	Contract Start Date	Contract End Date	AR
000000001	2/26/2002	3rd Party on-site mixed dev	2/26/2002	2/26/2017	02
000000006	2/26/2002	Installation of software	2/26/2002	2/6/2017	02
000000008	2/26/2002	Replacement	2/26/2009	11/26/2016	01
000000009	2/26/2002	Install driver	2/26/2012	2/26/2016	02
000000010	2/26/2002	Warranty life	2/26/2002	4/26/2015	02
000000012	2/26/2002	Initial upgrade and downlo	2/26/2002	2/26/2016	02
000000014	2/26/2002	Building	2/26/2002	2/26/2018	01
000000018	2/26/2002	Furniture repairation	2/26/2002	4/10/2020	01

<Filter is Empty> Filter Builder...

SM Tasks

Task Number	Task Date	Task Description	Task Type	Task Status	Contract Number	AR Division
0000996	6/6/2016	Installation	Entered		000000001	02

Select Preview Setting...

Preview Explore Tasks

SM Contracts userig SMD 43 rows 1 rows

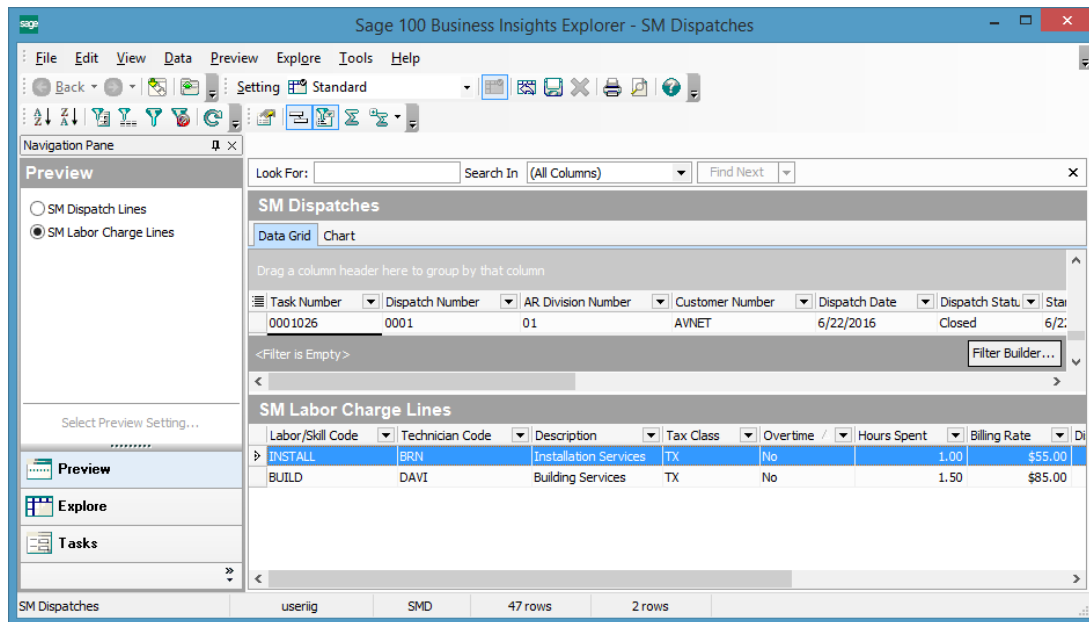
Dispatch View

Run the Dispatch View to view the SM Dispatches detail information. Select the SM Dispatch Line to view the line information and select the SM Labor Charge Lines to view the Labor Charge Data Entry lines

The screenshot shows the Sage 100 Business Insights Explorer - SM Dispatches window. The interface includes a menu bar (File, Edit, View, Data, Preview, Explore, Tools, Help), a toolbar, and a navigation pane on the left. The navigation pane has options for Preview, Explore, and Tasks. The Preview pane shows the SM Dispatch Lines table. The main area displays the SM Dispatches data grid. The data grid has columns: Task Number, Dispatch Number, AR Division Number, Customer Number, Dispatch Date, and Dispatch Status. The data grid shows a list of tasks with their respective dispatch numbers, AR division numbers, customer numbers, dispatch dates, and statuses. The SM Dispatch Lines table shows columns: Item Code, Item Code Description, Commissionable, Warehouse Code, Unit Of Measure, and Tax Class. The table lists four items: 2480-8-50 (DESK FILE 8" CAP 50), 4886-18-14-3 (PAPER CADDY 18"W 14"D 3"), 6655 (PRINTER STAND W/ BASKET), and BEL2500 (POS Terminal).

Task Number	Dispatch Number	AR Division Number	Customer Number	Dispatch Date	Dispatch Status
0001026	0001	01	AVNET	6/22/2016	Closed
TSK0610	0001	01	ABF	6/9/2016	Closed
TSK0611	0001	01	ABF	6/9/2016	Open
TSK0613	0001	01	ABF	6/9/2016	Open
TSK0614	0001	01	ABF	6/9/2016	Open
TSK0616	0001	01	AVNET	6/16/2016	Open
TSK0619	0001	01	AVNET	6/16/2016	Open
TSK0620	0001	01	AVNET	6/16/2016	Open

Item Code	Item Code Description	Commissionable	Warehouse Code	Unit Of Measure	Tax Class
2480-8-50	DESK FILE 8" CAP 50	Yes	000	EACH	TX
4886-18-14-3	PAPER CADDY 18"W 14"D 3"	No	002	EACH	TX
6655	PRINTER STAND W/ BASKET	No	002	EACH	TX
BEL2500	POS Terminal	Yes	002	EACH	TX



Contract View

The SM Contract Job Code Posting and SM Contract Job Code Transaction views have been added to the Business Insights Explorer Contracts view to allow the user to get information about the transactions from Contracts posted to jobs without printing reports.

Sage 100 Business Insights Explorer - SM Contracts

File Edit View Data Preview Explore Tools Help

Back Setting Standard

Navigation Pane

Preview

- ☐ SM Tasks
- ☐ SM Contract Details
- ☐ Sales Orders
- ☐ History Invoices
- ☒ SM Contract Job Code Posting
- ☐ SM Contract Job Code Transaction

Select Preview Setting...

Preview

Explore

Tasks

Look For: Search In (All Columns) Find Next

SM Contracts

Data Grid Chart

Drag a column header here to group by that column

Contract Number	Contract Date	Contract Description	Contract Start Date	Contract End Date	AR Division Numb
000000194	6/22/2016	Preventive Maintenance Co	6/22/2016	6/21/2026	01

(Contract Number = 000000194) Filter Builder...

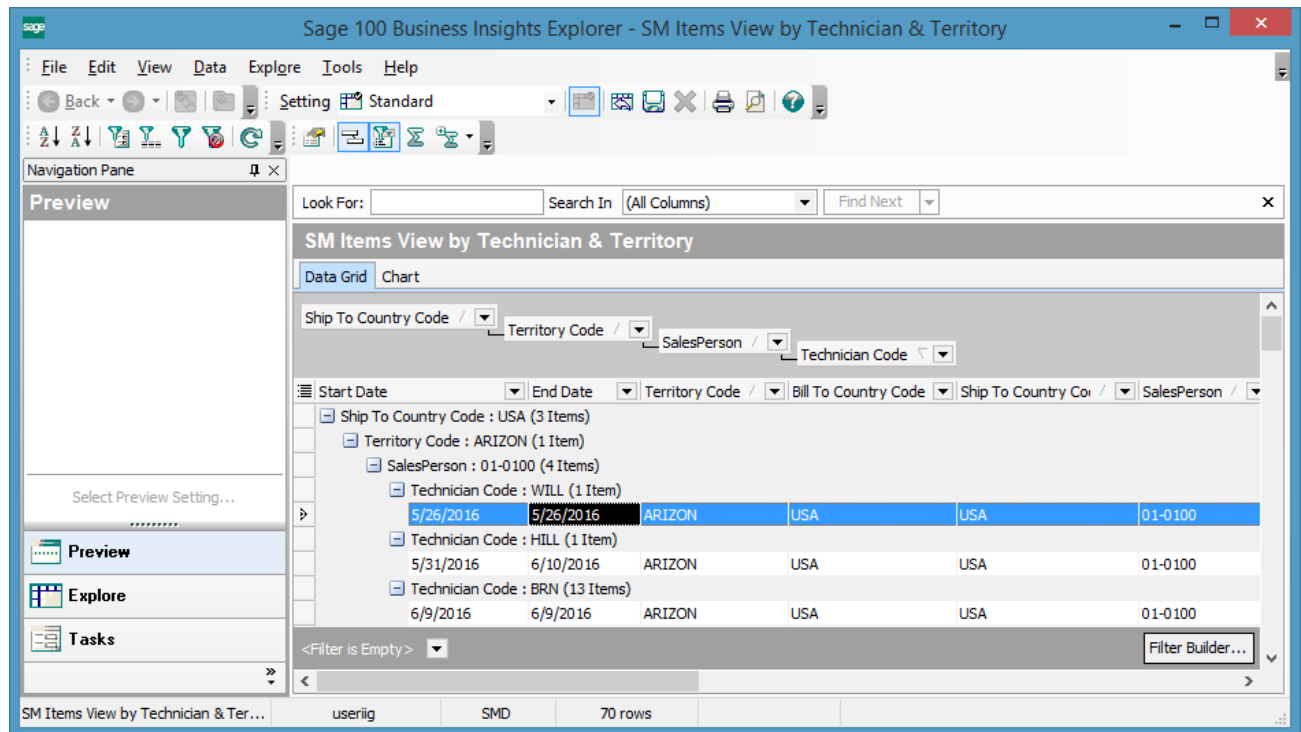
SM Contract Job Code Posting

Contract Number	Job Code	Fiscal Year	Fiscal Period	Quantity Postings	Cost Billed	Dollars Billed
000000194	400050000	2016	06	0	0	120
000000194	500000000	2016	06	0	0	250

SM Contracts useriig SMD 1 rows 2 rows

Items by Technician and Territory

Select the **Items by Technician and Territory** view to easily get information about the S/M Items by the **Ship To Country Code**, **Territory Code**, **Technician** and **Salesperson**.



Contract Items View

Select the **Contract Items** view to easily get information about number of visits for each Contract Item by the selected week day: Monday, Tuesday, etc.

Sage 100 Business Insights Explorer - SM Contract Items

File Edit View Data Preview Explore Tools Help

Back Setting Standard

Navigation Pane

Preview

- ☒ SM Monday
- ☐ SM Tuesday
- ☐ SM Wednesday
- ☐ SM Thursday
- ☐ SM Friday
- ☐ SM Saturday
- ☐ SM Sunday
- ☐ SM Price Changes

Select Preview Setting...

Preview

Explore

Tasks

Look For: Search In (All Columns) Find Next

SM Contract Items

Data Grid Chart

Drag a column header here to group by that column

Route	Contract Number	Item Code	Item Code Description	Ship To Code	Ship To Address 1	Ship To Address 2
	00000040	2480-8-50		2	Racine Warehouse	5411 Kendrick Place
RT001	000000174	1001-HON-H252	HON 2 DRAWER LETTER FLE	1	Distribution Warehouse	3121 W. 24th Street
RT001	000000174	6655	PRINTER STAND W/ BASKET	1	Distribution Warehouse	3121 W. 24th Street
RT001	000000182	6655	PRINTER STAND W/ BASKET	2	56 Technology	Building two
RT001	000000190	6655	PRINTER STAND W/ BASKET	1	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	1001-HON-H252		3	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	2480-8-50		3	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	6655		3	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	1001-HON-H252	HON 2 DRAWER LETTER FLE	3	Distribution Warehouse	3121 W. 24th Street

Monday

Number Of Visit	Contract Number	Item Code	Item Code Description	Ship To Code	Ship To Address 1	Ship To Address 2
1	000000191	6655		3	Distribution Warehouse	3121 W. 24th Street
2	000000174	6655	PRINTER STAND W/ BASKET	1	Distribution Warehouse	3121 W. 24th Street
3	000000182	6655	PRINTER STAND W/ BASKET	2	56 Technology	Building two
4	000000190	6655	PRINTER STAND W/ BASKET	1	Distribution Warehouse	3121 W. 24th Street

SM Contract Items useriig SMD 77 rows 4 rows

This view provides also information about the Contract Item Price changes (Renew Amount).

Sage 100 Business Insights Explorer - SM Contract Items

File Edit View Data Preview Explore Tools Help

Back Setting Standard

Navigation Pane

Preview

- ☐ SM Monday
- ☐ SM Tuesday
- ☐ SM Wednesday
- ☐ SM Thursday
- ☐ SM Friday
- ☐ SM Saturday
- ☐ SM Sunday
- ☒ SM Price Changes

Select Preview Setting...

Preview

Explore

Tasks

Look For: Search In (All Columns) Find Next

SM Contract Items

Data Grid Chart

Drag a column header here to group by that column

Route	Contract Number	Item Code	Item Code Description	Ship To Code	Ship To Address 1	Ship To Address 2
	000000040	2480-8-50		2	Racine Warehouse	5411 Kendrick Place
RT001	000000174	1001-HON-H252	HON 2 DRAWER LETTER FLE	1	Distribution Warehouse	3121 W. 24th Street
RT001	000000174	6655	PRINTER STAND W/ BASKET	1	Distribution Warehouse	3121 W. 24th Street
RT001	000000182	6655	PRINTER STAND W/ BASKET	2	56 Technology	Building two
RT001	000000190	6655	PRINTER STAND W/ BASKET	1	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	1001-HON-H252		3	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	2480-8-50		3	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	6655		3	Distribution Warehouse	3121 W. 24th Street
RT001	000000191	1001-HON-H252	HON 2 DRAWER LETTER FLE	3	Distribution Warehouse	3121 W. 24th Street

Price Changes

Contract Number	Item Code	Item Code Description	Amount	Last Change Amount	Last Amount Change Date
000000191	1001-HON-H252		100	90	05/26/2016

SM Contract Items useriig SMD 77 rows 1 rows

SM Closed Dispatches

The Closed Dispatches view allows for getting information about the Dispatches that are already closed. If the Dispatch is closed in the Invoice, Sales Order or Production the Generated Document type and the number are displayed.

Sage 100 Business Insights Explorer - SM Closed Dispatches

File Edit View Data Explore Tools Help

Back Search In (All Columns) Find Next

Navigation Pane

Preview

SM Closed Dispatches

Data Grid Chart

Drag a column header here to group by that column

Task Number	Dispatch Number	Generated Document N	Generated Document Type	AR Division Number	Customer Number
0000974	0001	0100263	Invoice	01	ABF
0000976	0001	0100264	Invoice	01	ABF
0000976	0002	0100266	Invoice	01	ABF
0000979	0001	0100267	Invoice	01	ABF
0000980	0001	0100268	Invoice	01	ABF
0000980	0002	0100268	Invoice	01	ABF
0000981	0001	0100269	Invoice	01	ABF
0000982	0001	0100270	Invoice	01	ABF
0000989	0001	INV0627	Invoice	01	ABF
0000989	0002	INV0627	Invoice	01	ABF
0001004	0001	INV0617	Invoice	01	ABF
0001008	0001	INV0618	Invoice	01	ABF
0001010	0001	INV0620	Invoice	01	ABF
0001014	0001	0000369	Sales Order	01	AVNET
0001015	0001			01	ABF
0001025	0001	0000005	Production	01	AVNET
0001026	0001	0000007	Production	01	AVNET
TSK0610	0001	0000004	Production	01	ABF

Select Preview Setting...

Preview

Explore

Tasks

(Dispatch Status = C)

Filter Builder...

SM Closed Dispatches userlig SMD 59 rows

Examples

Sales Order Entry (example from SM Options; Sales Kit Item Number)

Example:

Sage Sales Order Entry (SMD) 6/23/2016

Order Number: 0000398

Copy From... Defaults... Customer... Credit... Tasks...

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | User: useriig

Quick Row: 1

Bill of Materials Search, ALT-V

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Vendor Number	Cost
1		.00	.00	.000	.00		XXXXXXXXXX XXX

Description: Warehouse: Unit Of Measure: Shipped: .00 Price Level:

Total Amount: .00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

Click the **Bill of Materials Search** button to select a kit.

Bill Number	Description
BEL2500	POS Terminal
BEL2850	Printer Unit
D1400	POS Register
D1500	DESK ENSEMBLE
D1700	SECRETARY DESK ENSEMBLE

Search: Bill Number Begins with [] Find

Filters...

Custom... Lookup Wizard... Select Cancel [Export] [Print] [Help]

Found 5 records

The following message box will be displayed.

Sage 100

The quantity available in this warehouse is 19.00- EACH. Do you want to order this sales kit from stock? Click Yes to order this as a kit from stock. Click No to explode the lines to order by component.

Yes No

Click **No**.

Enter **Quantity Ordered** and click **OK**.

Sage Sales Order Entry (SMD) 6/23/2016

Order Number: 0000398

Copy From... Defaults... Customer... Credit... Tasks...

1. Header 2. Address 3. Lines 4. Totals 5. Credit Card User: useriig

Quick Row: 1

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Vendor Number	Cost
1	D1400	2.00	.00	2,200.000	4,400.00		850.000
2	1001-HON-H252	2.00	.00	.000	.00	01-CONT	.000
3	D1000-BBW/LIGHT	4.00	.00	.000	.00		.000
4	D1000-LHDS	2.00	.00	.000	.00		.000
5	D1000-LOCK	4.00	.00	.000	.00		.000
6	D1000-RHDS	2.00	.00	.000	.00		.000
7	D2000	2.00	.00	.000	.00		.000
8	D2000-C	4.00	.00	.000	.00		.000

Description: Door Installation
Warehouse: 001
Unit Of Measure: EACH
Shipped: .00
Price Level: 1

Total Amount: 4,400.00

Print Order... Print Pick... Recalc Price Accept Cancel Delete

When the **Present Sales Kit as a Set of Regular Items** checkbox in **Service Management Options** is unchecked, a Sales Kit Item is loaded as a line item with its appropriate unit price and line extension.

If the **Present Sales Kit as a Set of Regular Items** checkbox in the **Service Management Options** is checked, a Sales Kit Item is replaced with a comment line item, indicating sales kit item number and description.

The screenshot shows the Sage Sales Order Entry (SMD) 6/23/2016 window. The Order Number is 0000399. The window displays a table of line items:

	Item Code	ack Ordere	Unit Price	Extension	endor Numb	Cost	Comment
1	/C	.00	.000	.00			D1400 // KIT ITEM ENTERED // Door I...
2	1001-HON-H252	.00	84.000	84.00	01-CONT	29.575	
3	D1000-BBW/LIGHT	.00	130.000	260.00		65.000	
4	D1000-LHDS	.00	140.000	140.00		70.000	
5	D1000-LOCK	.00	30.000	60.00		15.000	
6	D1000-RHDS	.00	140.000	140.00		70.000	
7	D2000	.00	1,250.000	250.00		550.000	
8	D2000-C	.00	800.000	600.00		125.000	

The Total Amount is 3,658.00. The window also includes buttons for Print Order, Print Pick, Recalc Price, Accept, Cancel, and Delete.

All the kit components are loaded as regular line items with appropriate price and extension information.

This logic is applied also if the **Explode Kit Items** option on the Additional tab of Item Maintenance is set to **Always**.

Auto Generate Task Based on a PM Schedule

Contract Data Entry

Here is an example of PM Contract with a schedule (the 1st Monday of each month) created for preventative maintenance tasks. Based on this schedule preventive maintenance tasks will be generated each month on the 1-st Monday.

The screenshot displays the Sage Contract Data Entry (SMD) 6/23/2016 window. The main window shows contract details for Contract No. 000000191, Customer No. 01-ABF, and Contract Date 5/26/2016. A PM Schedule dialog box is open, showing a monthly schedule starting on the first Monday of the month, from 5/26/2016 to 7/26/2018. The PM Schedule dialog box has tabs for Schedule, Start Date, End Date, and Days. The Days tab is selected, showing a list of days with checkboxes: Monday (checked), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. The PM Code 00 is entered in the PM Code field.

Upon selecting the “PM” code on the Contract Item, the PM Schedule created for the Contract Header is copied to the Contract Item and may be changed for particular Item.

Contract Item Maintenance (SMD) 6/23/2016

Customer No. 01-ABF American Business Futures
Contract Number 000000191

Component... Labor/Skill... Quick Row 6

	Item Code	Lot/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date	
1	1001-HON-H252		<input checked="" type="checkbox"/>	1.00	100.00	5/26/2016	7/26/2018	Contr
2	2480-8-50	FEB-203	<input type="checkbox"/>	2.00	60.00	5/26/2016	5/26/2018	
3	6655		<input type="checkbox"/>	3.00	170.00	5/26/2016	5/26/2018	
4	1001-HON-H252		<input type="checkbox"/>	1.00	84.00	5/26/2016	7/26/2018	
5	1001-HON-H252		<input type="checkbox"/>	1.00	84.00	5/26/2016	7/26/2018	
6	1001-HON-H254LK		<input type="checkbox"/>	.00	.00	5/26/2016	7/26/2018	
7								

Coverage Code
Response Code
Ship To
Billing Freq.
PM Code 00
Type Code

PM Schedule

Schedule Monthly Every month on the: First

Start Date 5/26/2016
End Date 7/26/2018

Number Of Visit

<input checked="" type="checkbox"/> Monday	0	
<input type="checkbox"/> Tuesday	0	
<input type="checkbox"/> Wednesday	0	
<input type="checkbox"/> Thursday	0	
<input type="checkbox"/> Friday	0	
<input type="checkbox"/> Saturday	0	
<input type="checkbox"/> Sunday	0	

OK Cancel

Run the Auto Generate Tasks Selection program and select the Contract:

Auto Generate Tasks Selection (SMD) 6/23/2016

Generate Tasks for all Contract Items ☒ Generate Dispatches for all Contract Items ☒

Up To Date: 7/23/2016

Select Field	Operand	Value
PM Code	All	
Contract No.	Equal to	000000191
Customer Number	All	
Item Code	All	
Nature Of Task	All	
Route	All	
Technician Code	All	

Clear Proceed Cancel [Printer Icon]

If you're running the Task generation program with the "PM Task generate Based on Task Close Date" option turned on in the SM Options, you'll see only 1 task generated for Header and one for Contract Item. The next Task will be generated only after the last Task generated for current Contract is closed:

Auto Generate Tasks Selection Listing

SM Demo Company (SMD)

Contract Number	PM Code	Task Date	Customer Number	Name	Item Code	Lot/Serial No.	Record
000000191	00	6/6/2016	01-ABF	American Business Futures	1001-HON-H252		Header
000000191	00	6/6/2016	01-ABF	American Business Futures	1001-HON-H254LK		Item

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

Here is the list of Tasks being generated for the same Contract (if the "PM Task Generate Based on Task Close Date" option is turned off in the SM Options):

Auto Generate Tasks Selection Listing

SM Demo Company (SMD)

Contract Number	PM Code	Task Date	Customer Number	Name	Item Code	Lot/Serial No.	Record
000000191	00	6/6/2016	01-ABF	American Business Futures	1001-HON-H252		Header
000000191	00	7/4/2016	01-ABF	American Business Futures	1001-HON-H252		Header
000000191	00	6/6/2016	01-ABF	American Business Futures	1001-HON-H254LK		Item
000000191	00	7/4/2016	01-ABF	American Business Futures	1001-HON-H254LK		Item

Current Page No.: 1 Total Page No.: 1 Zoom Factor: 100%

All the Tasks being generated are scheduled respectively for the 1-st Monday of each month: 6/6/2016, 7/4/2016.

Here is the first Task generated:

Task Data Entry (SMD) 6/23/2016

Task No. 0001028 3rd Party on-site mixed device Defaults...

1. Header 2. Address 3. Dispatches 4. Credit Card User useriig

Task Date 6/23/2016 Task Time 03:58 PM Task Type Installation

Customer No. 01-ABF American Business Futures

Deposit Payment Type CREDIT CARD Amex Task Total .00 Tax .00

Task Status E Entered Salesperson 0100 Jim Kentley

Contract No. 000000191 3rd Party on-site mixed device

Job Site Code 2 American Business Futures

Job Site Contact John Quinn

Nature of Task

Preferred Tech. ADAM Adams Arnold

Preferred Mach.

Item Number 1001-HON-H254LK HON 4 DRAWER LETTER FLE W/ LC

Lot/Serial No.

Tax Schedule CA California Territory ARIZON Region Arizona

Default Misc Item

Separate Invoice ☐ Equipment...

Response

Coverage

Quote Amount .00

Scheduled Date 6/6/2016 Time 03:58 PM

Due Date 6/6/2016 Time 03:58 PM

Quote Hours .00 Disp

Documents Path \\Paruyr\2016\SMP\SMP_WithPayroll\MAS90\DOC\Tasks\0001028

Quick Print BMA Copy from... Quick Email Text Message Accept Cancel Delete

The Scheduled Date is set to the 1st Monday: 6/6/2016 of June.

Here is the Dispatch created during Task Generation:

Dispatch Data Entry (SMD) 6/23/2016

Task No. 0001028 3rd Party on-site mixed device

Dispatch No. 0001

1. Header | 2. Lines | 3. Credit Card | User useriig

Dispatch Date 6/23/2016 Dispatch Status 0 Open

Starting Date 6/6/2016 Starting Time 03:58 PM Commit Quantity ☒

Ending Date 6/23/2016 Ending Time 03:58 PM

Technician ADAM Adams Arnold

Machine

Equipment No. 1001-HON-H254LK HON 4 DRAWER LETTER FLE W/ LCK

Contract No.

Deposit Payment Type NONE

Check Number

Deposit Amount .00

Dispatch Total .00

Lines Total .00

Labor Total .00

Quick Print BMA Labor Accept Cancel Delete

The Components assigned to the Contract item in the Contract Entry are loaded into the Dispatch Lines:

Dispatch Data Entry (SMD) 6/23/2016

Task No. 0001028 3rd Party on-site mixed device

Dispatch No. 0001

1. Header 2. Lines 3. Credit Card User useriig

Quick Row 1

	Item Code	Ordered	Unit Price	Extension	Comment
1	6655	1.00	159.000	159.00	
2	1001-HON-H254	2.00	131.000	262.00	
3		.00	.000	.00	

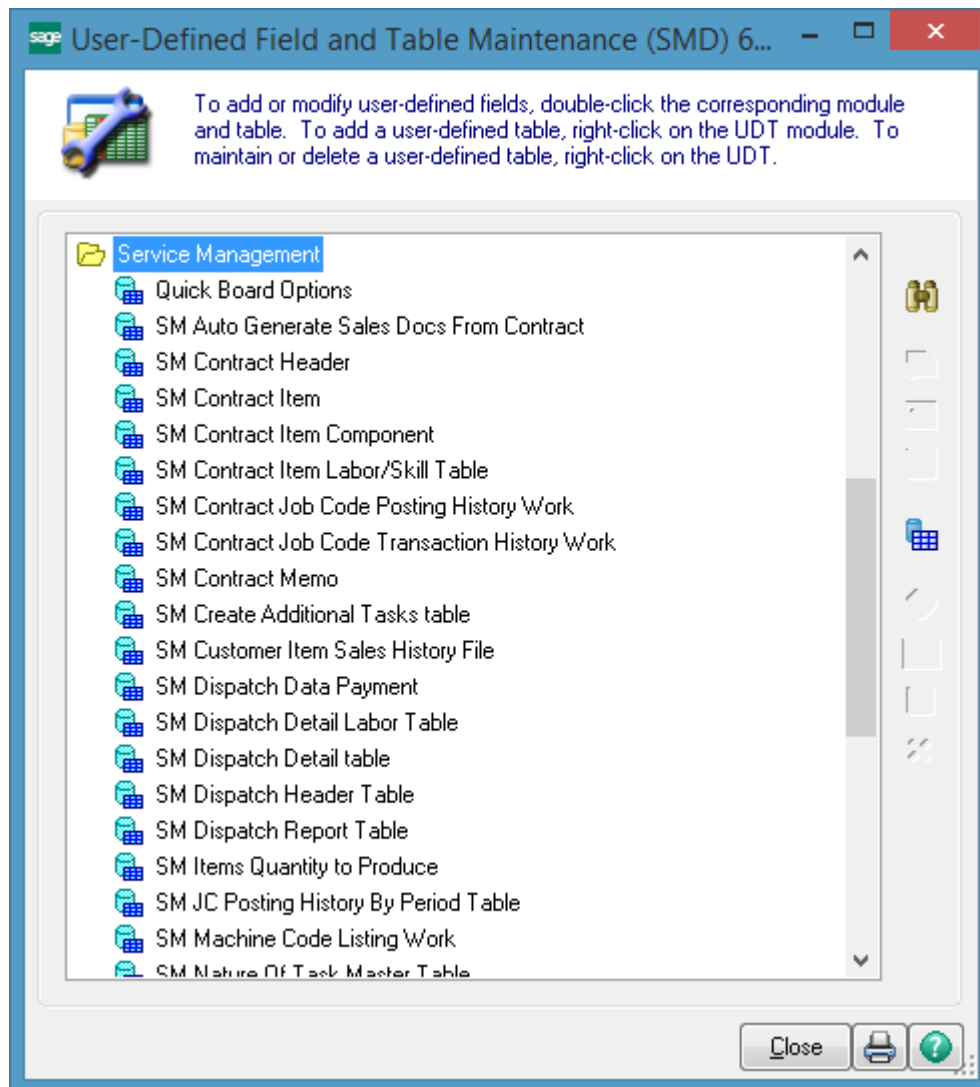
Description	PRINTER STAND W/ BASKET
Warehouse	000
Unit Of Measure	EACH
Price Level	1

Total Amount 421.00

Quick Print BMA Labor Accept Cancel Delete

Custom Office

The following **SM Module** tables are available in the **User-Defined Field and Table Maintenance**:

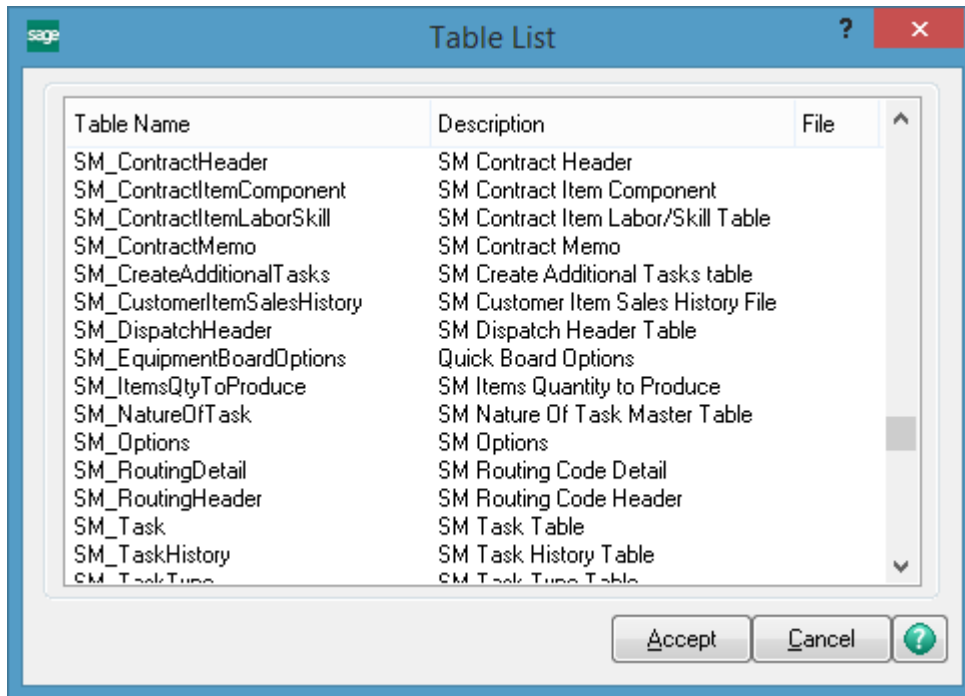


Note: When adding a UDF field in the SM Task Table, at the same time it is necessary to add the same UDF (with the same name, size) also in the SM Task History Table.

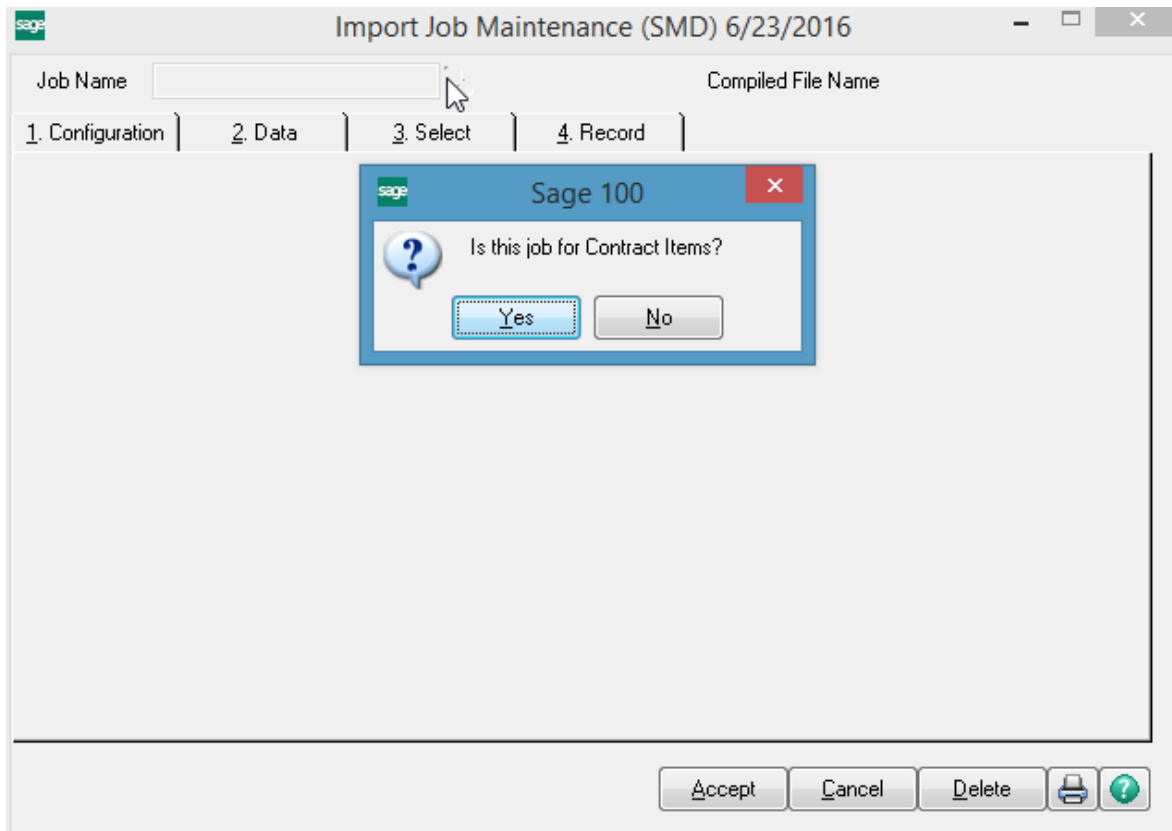
Visual Integrator

It is possible to create and maintain import/export jobs for importing/exporting data of S/M (Service Management) module through **Visual Integrator**.

The following SM data files are available for Import in Visual Integrator:



When creating Import job for Contract Items it is necessary to select the SM_Contract Header table from the list:



Select **Yes** to create a job for importing Contract Items.

Import Job Maintenance (SMD) 6/23/2016

Job Name: Compiled File Name:

1. Configuration | **2. Data** | 3. Select | 4. Record

Available Fields

- H.ContractNo
- H.ContractDate
- H.ContractDescription
- H.ExtendedDescriptionKey
- H.ContractStartDate
- H.ContractEndDate
- H.ARDivisionNo
- H.CustomerNo
- H.BillToAddress1
- H.BillToName
- H.BillToAddress2
- H.BillToAddress3
- H.BillToCity
- H.BillToState
- H.BillToZipCode
- H.BillToCountryCode
- H.ShipToCode
- H.ShipToName

Field Name	Typ	Oper	Col/Pos	Len	Msk/Val
H.ContractNo	S	REPL	00001	9	
H.ContractDate	D	REPL	00002	10	M/D/Y
H.ContractStartDate	D	REPL	00003	10	M/D/Y
H.ContractEndDate	D	REPL	00004	10	M/D/Y
H.ARDivisionNo	S	REPL	00005	2	00
H.CustomerNo	S	REPL	00006	20	
H.NumberOfDaysinOnePM	N	REPL	00007	5	
H.TimeCreated	S	REPL	00008	8	
H.UserCreatedKey	S	REPL	00009	10	0000000000
L.ItemCode	S	REPL	00010	30	
L.StartingDate	D	REPL	00011	10	M/D/Y
L.EndingDate	D	REPL	00012	10	M/D/Y

Accept Cancel Delete ?

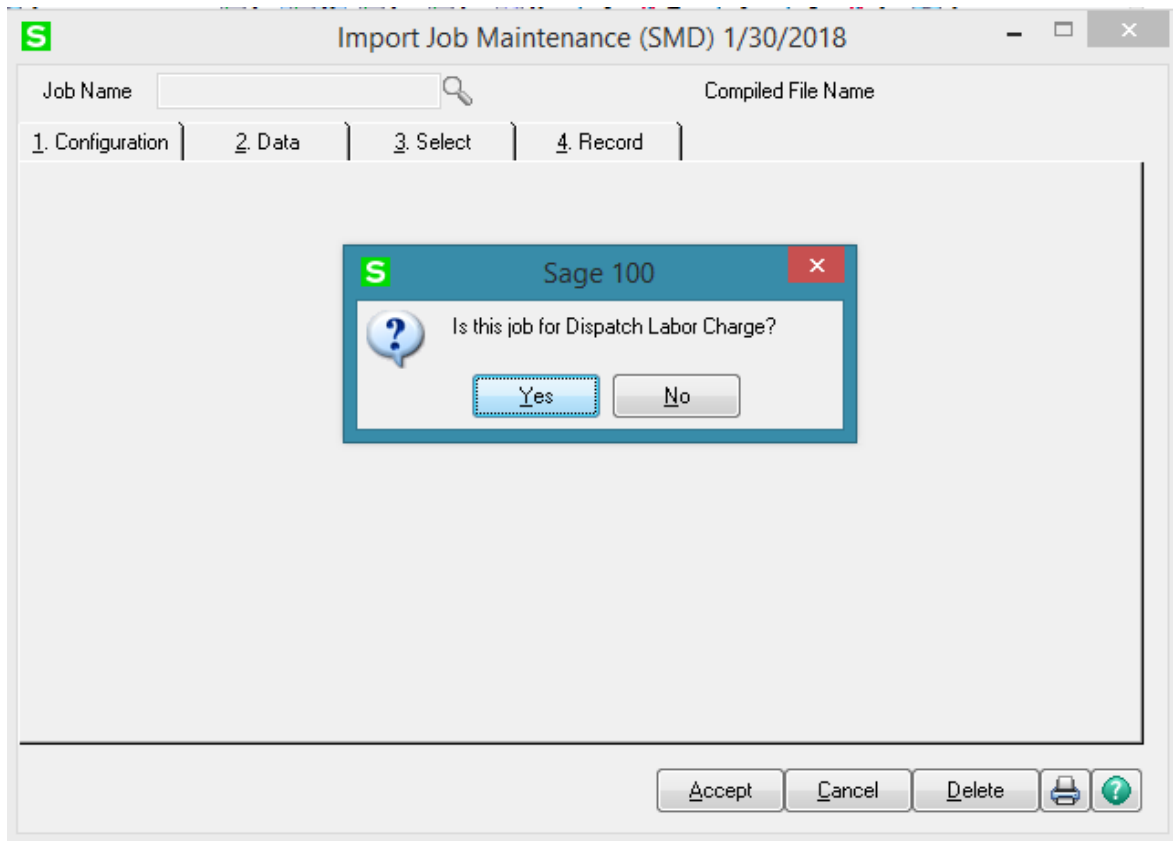
When creating Import job for Dispatch Entry it is necessary to select the SM_DispatchHeader table from the list:

S V/I Import Job Selection

Job Name:

Table Name:

Accept Cancel ?



Select **No** if you want to create a Job for importing Dispatch lines.
Select **Yes** to create a job for importing Dispatch Labor Charge lines.

S Import Job Maintenance (SMD) 1/30/2018

Job Name: Compiled File Name: VIW100

1. Configuration | 2. Data | 3. Select | 4. Record

Available Fields

- H.TaskNo
- H.DispatchNo
- H.ARDivisionNo
- H.CustomerNo
- H.DispatchDate
- H.DispatchStatus
- H.StartDate
- H.StartTime
- H.EndDate
- H.EndTime
- H.TechnicianCode
- H.CommitQty
- H.Manufacturing
- H.GeneratedDocumentNo
- H.GeneratedDocumentType
- H.TaxableAmt
- H.NonTaxableAmt
- H.DispatchTotal

Field Name	Typ	Oper	Col/Pos	Len	Msk/Val
H.TaskNo	S	REPL	00001	7	
H.DispatchNo	S	REPL	00002	4	
H.ARDivisionNo	S	REPL	00003	2	00
H.CustomerNo	S	REPL	00004	20	
H.DispatchDate	D	REPL	00005	10	M/D/Y
H.DispatchStatus	S	REPL	00006	1	
H.StartDate	D	REPL	00007	10	M/D/Y
H.StartTime	S	REPL	00008	8	
H.EndDate	D	REPL	00009	10	M/D/Y
H.EndTime	S	REPL	00010	8	
H.TechnicianCode	S	REPL	00011	4	
L.LaborSkillCode	S	REPL	00012	7	
L.LineType	S	REPL	00013	1	
L.TechnicianCode	S	REPL	00014	4	

Accept Cancel Delete ?