Service Management
For Sage 100 ERP

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Installation Instructions and Cautions

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

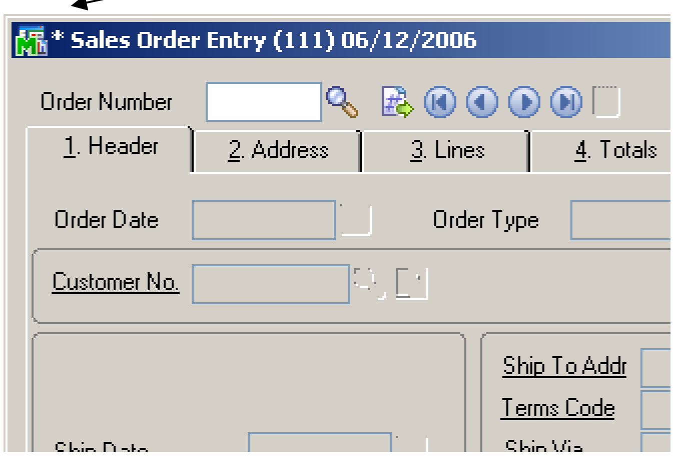
Wait! Before You Install – Do You Use CUSTOM OFFICE?

***THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 ERP 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 change*

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**!

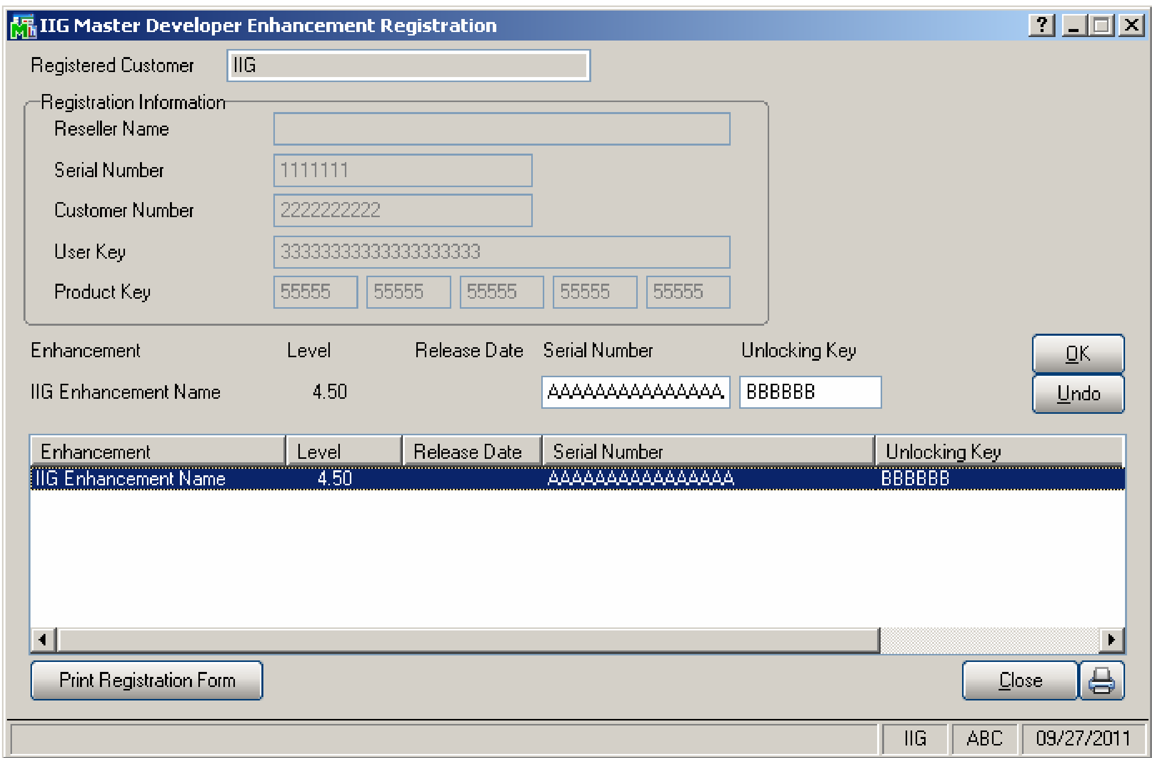


Registering IIG products

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 ERP.

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**.



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.

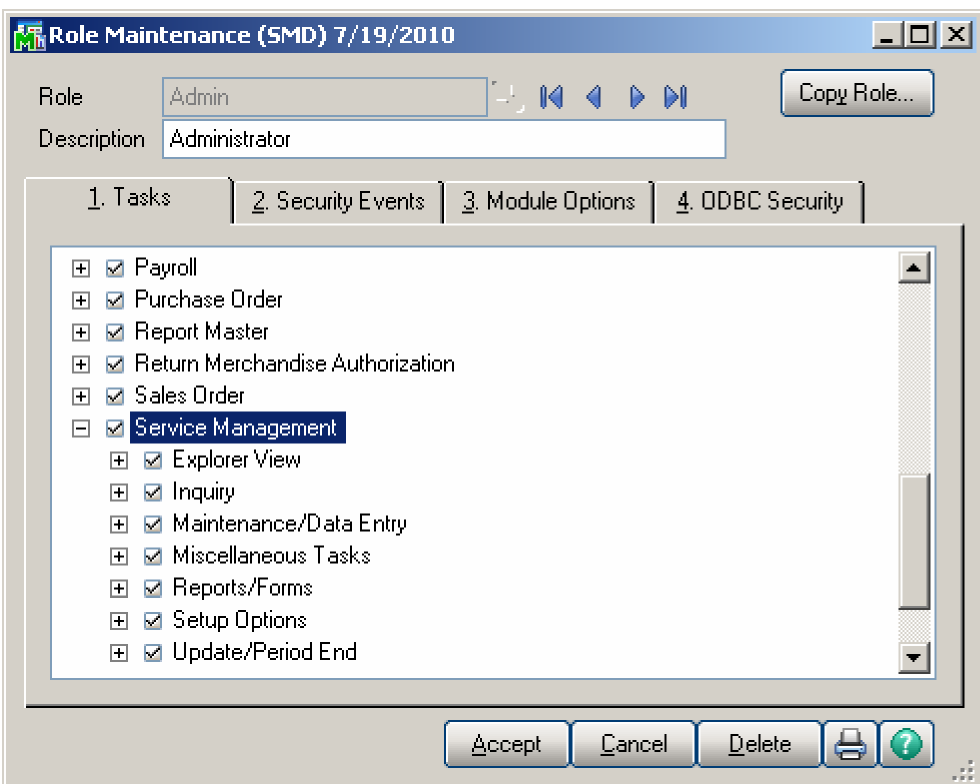
Use the **Print Registration Form** button to print
IIG Registration Form.

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	4.50
A/R	Y	4.50
S/O	Y	4.50
A/P	Y	4.50
P/O	Y	4.50

2. Necessarily refer to the steps described in the **Installing Service Management** section or the **"SMP450_CD\Doc\Installation Instructions for SMP.txt"** file

Installing Service Management

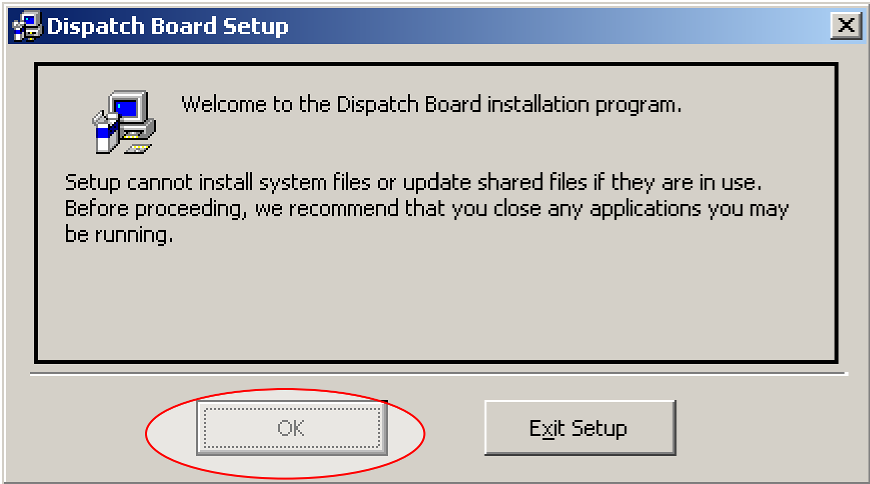
Note: If you are not going to use the SM Dispatch Board, you may start installation from step 2.

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.

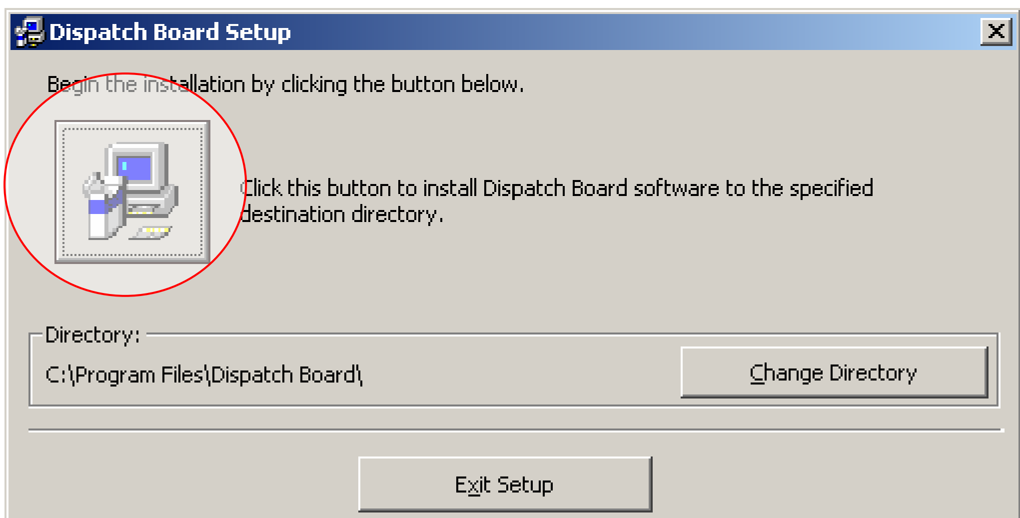
   If on Vista, Win7 or Windows 2008 answer Yes on the Windows security prompt to allow the program to install.



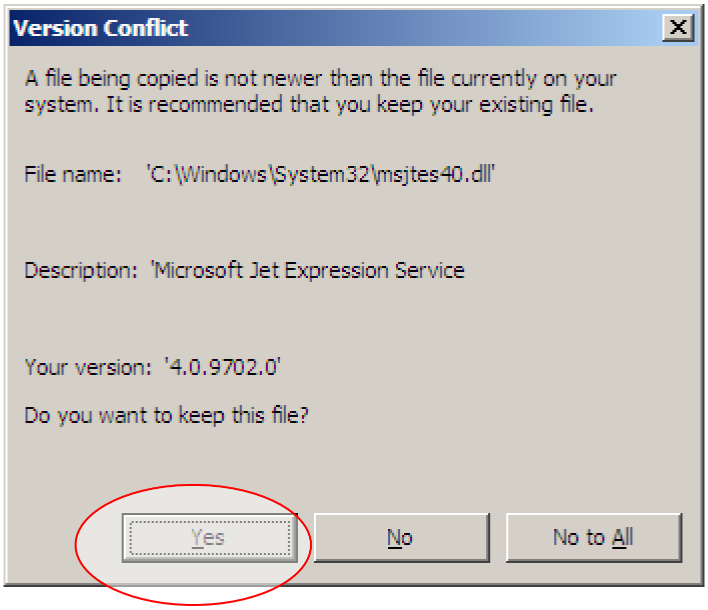
Press OK to proceed with installation.

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.

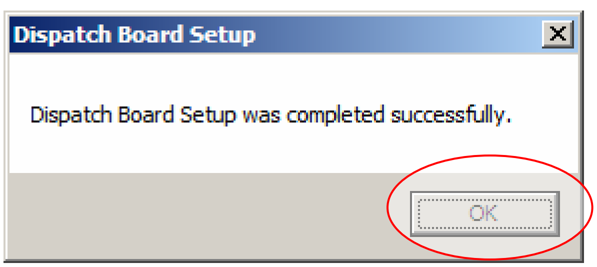


1.3 The following prompt appears if some DLL files being installed during this installation are older than the ones existing in your system:



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.

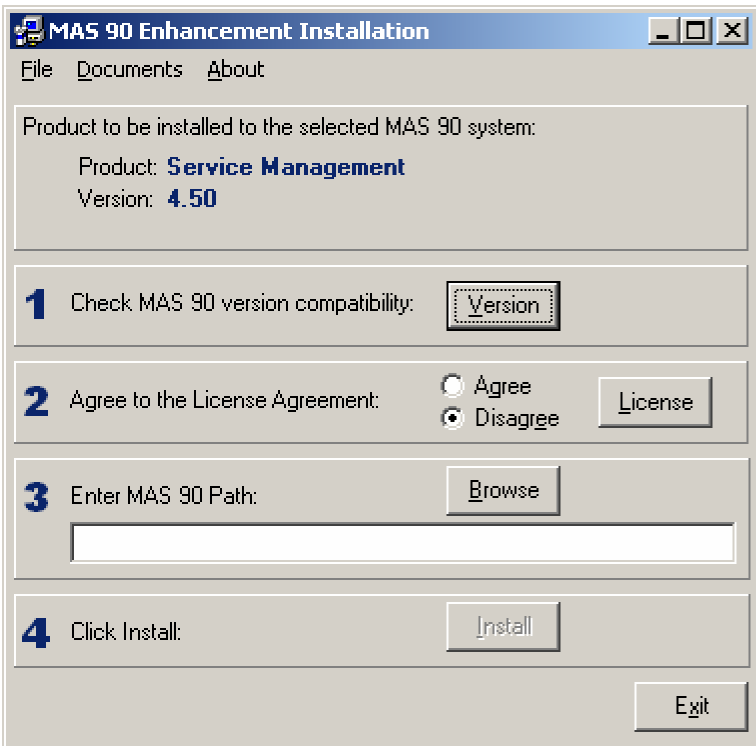
1.4 Once the Dispatch Board installation program finishes the following message appears. Click the OK button to exit the installation program.



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 backup before installing!
2.2 Open the **SMP450_CD** folder.
2.3 Run **Setup.exe**.

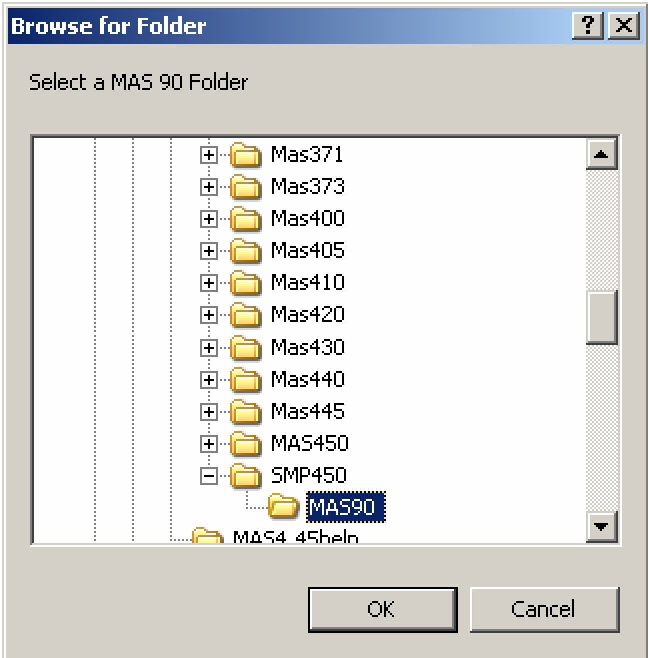
Running SETUP.EXE begins the installation process. The installation screen will look similar to this:



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. On the **Select MAS 90 Directory** screen, select the drive letter then select the folder where your MAS 90 is installed.

The screen is look like this:



Click **OK** to accept the folder selection.

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.

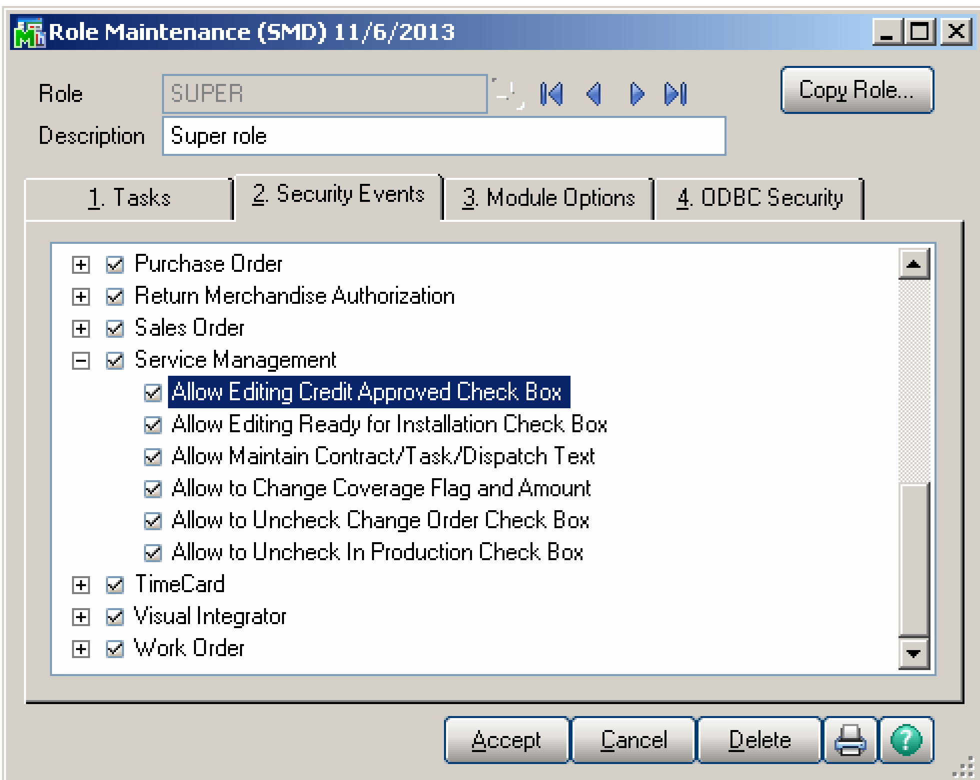
3. Open the **IIG_Dll_CD** and run the **Setup.exe** to install and register some DLL(s) and OCX(s) needed for SM proper functionality. Follow on-screen instructions for installation.

Setup Activities

Set Up Security

Role Maintenance

The **Allow Editing Credit Approved Check Box** , **Allow Editing Ready for Installation Check Box**, **Allow Maintain Contract/Task/Dispatch Text, 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.



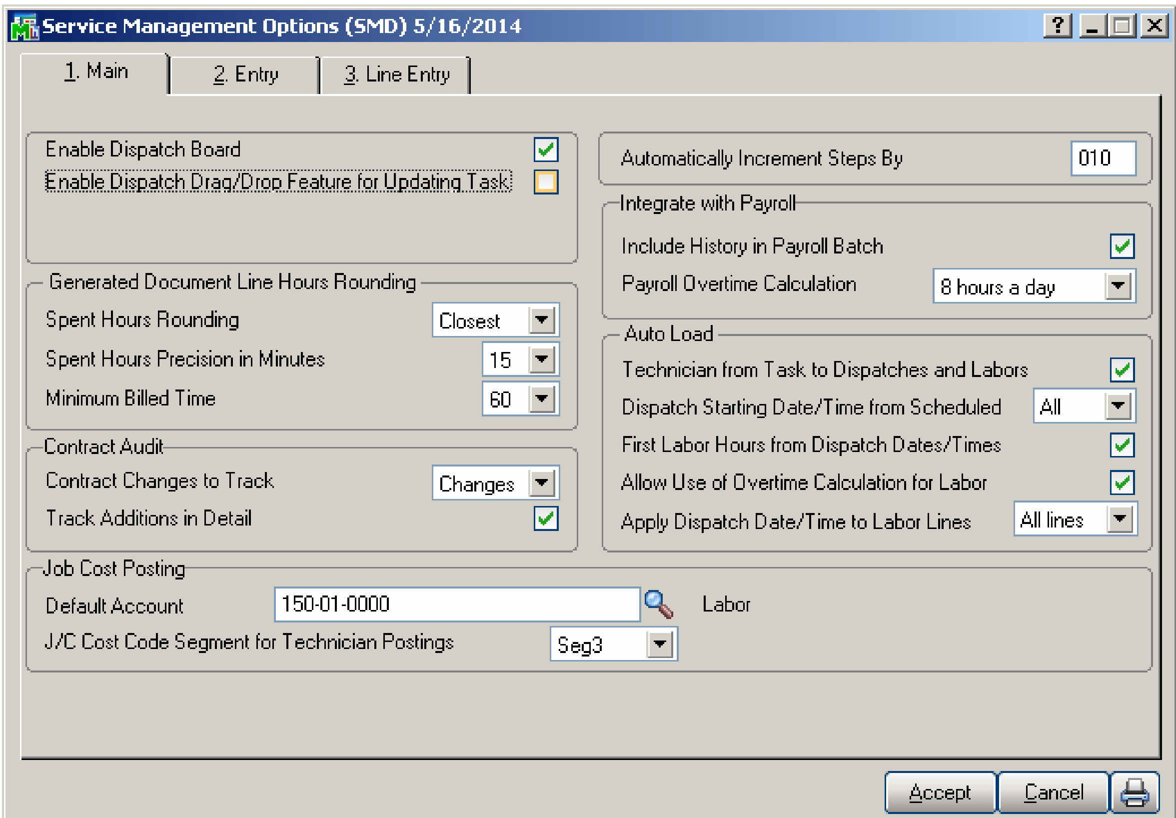
Allow Editing Credit Approved Check Box – allows the user to manually change the Credit Approved flag in the Installation Management screen.
Allow Editing Ready for Installation Check Box – allows the user to change the **Ready For Installation** setting in the Installation Management screen.
Allow Maintain Contract/Task/Dispatch Text – 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 to Change Coverage Flag and Amount – allows the user to enter the Contract Total Amount and set coverage flags.
Allow to Uncheck Change Order Check Box – allows the user to change the Change Order flag manually in the Installation Management.
Allow to Uncheck In Production Check Box – allows the user to turn off the In Production flag set automatically after Production Task is generated.

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, 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.

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

Generated Document Line Hours Rounding – this group provides settings for rounding of dispatch labor lines' hours during generation of sales order or invoice when the dispatch is closed.

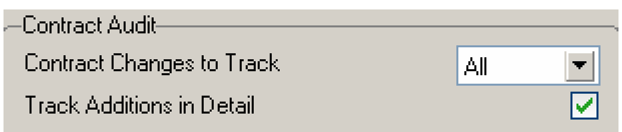
Spent Hours Rounding- the available options are: **Up**, **Down**, **Closest**, **None**.

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

Minimum Billed Time dropdown menu is also set in 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

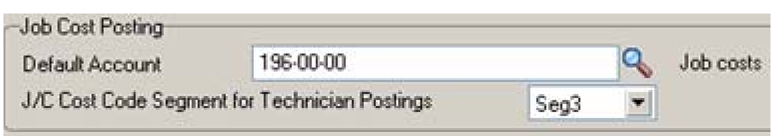
Contract Changes to Track – available options are**: None; All; Deletions, Additions, Changes.** Select **Yes** to track all kind of changes, **None** for not tracking at all. **Deletions**, **Additions**, or **Changes** setting will allow for tracking respective actions.



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

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**.

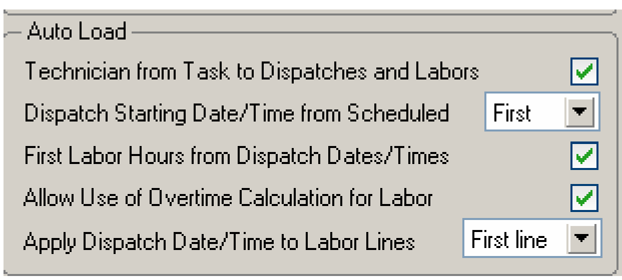
J/C Cost Code Seg. for Tech Posting- is used for specifying the segment of Cost Code that should be substituted with **Cost Code Segment Value** entered in the **Technician Code Maintenance** (if any), during the import into the **Job Posting Entry**.

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.

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 (More Info) into the generated dispatches. Three options are available: **None, First, All**.

- **None-** the Task's **Scheduled Date/Time** will not be loaded into any of the generated dispatches.
- **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.

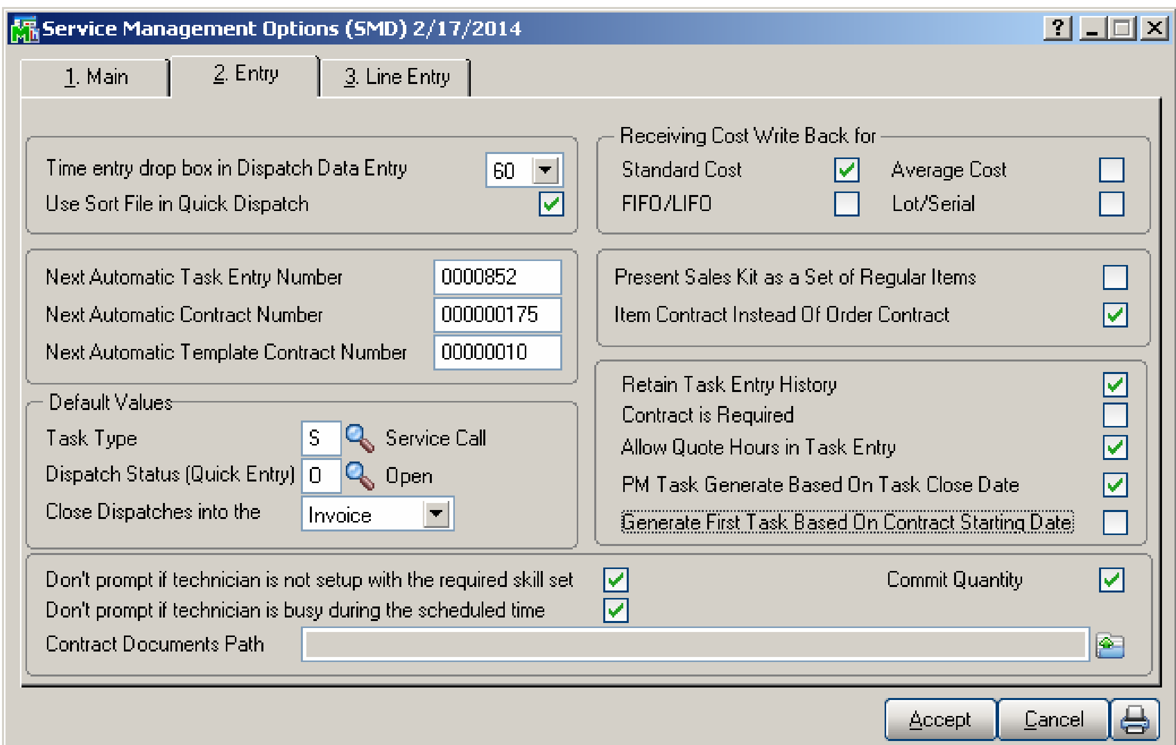
First Labor Hours from Dispatch Dates/Times- allows automatically calculating the Hours Spent based on the dispatch Staring and Ending Date/Time and loading it to the first labor line entered in the dispatch.

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 not be applied to any 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.

Use Sort File in Quick Dispatch- If this check box is not selected, the **Quick Dispatching** program loads all the newly updated/created information. Otherwise, if the **Use Sort File in Quick Dispatch** check box is selected, the **Quick Dispatching** program displays only existing information.

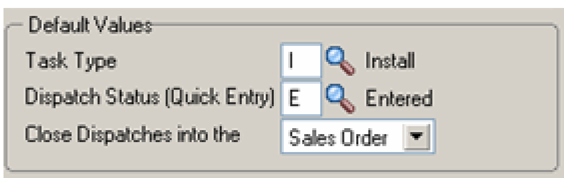
Next Automatic Task Entry Number- enter the next task number to assign when using the Automatic Task Number feature in the Task Data Entry.

Next Automatic Contract Number- enter the next contract number to assign when using the Automatic Contract Number feature in the Contract Data Entry.

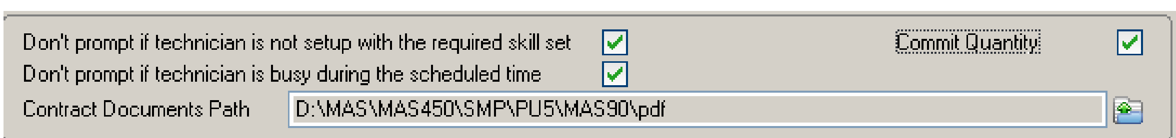
Next Automatic Template Contract Number- enter the next template contract number to assign when using the Next Template Contract Number feature NTC in the Contract Data Entry. A template contract is used to generate a regular contract (such as a standard service contract) whenever a particular item is 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 (Quick Entry) - select the status to be used by default when Dispatch is created with **Quick Dispatch Line Entry**.
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 **None** to not generate any sales document when closing dispatch.



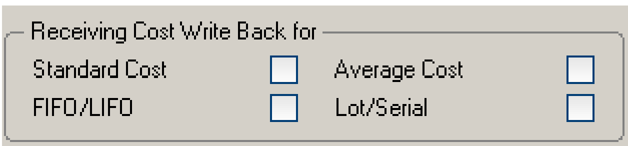
Don't prompt if technician is not setup with the required skill set- check this box to suppress the prompt appeared in the Dispatch Board and Sales Order Entry if the technician's skill level does not match the skill required for that Nature of Task.

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).

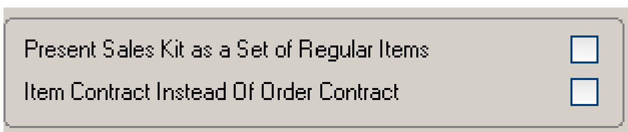
Contract Documents Path- select the path where the Contract related documents are stored. The selected path is defaulted to the Contract Data Entry documents path.

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

The **Receiving Cost Write Back for** options are intended for specifying the **Valuation** types of inventory items, for which the receiving cost will be used when updating invoice. This option can be set separately for the following Valuation types of items: **Standard Cost**, **Average Cost**, **LIFO/FIFO**, **Lot/Serial**. This group of options can be applied only to the Purchase Orders generated through the **P/O Auto Generate Orders Selection** program (**SO to PO Link**).

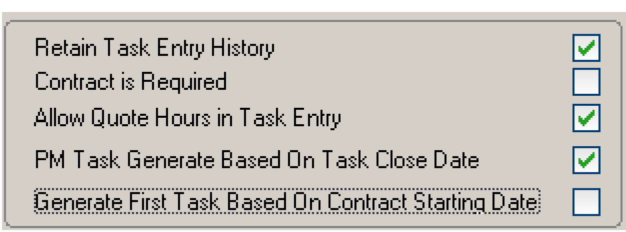


Present Sales Kit as a Set of Regular Items- If this check box is selected, the Sales Kit Item number will be replaced with a comment line indicating sales kit number during Dispatch Data Entry, Sales Order Entry or Invoice Data Entry. All the components of that kit will be presented as regular line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



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- 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.

Days to Retain Closed Tasks- Enter the number of days to retain Task history.

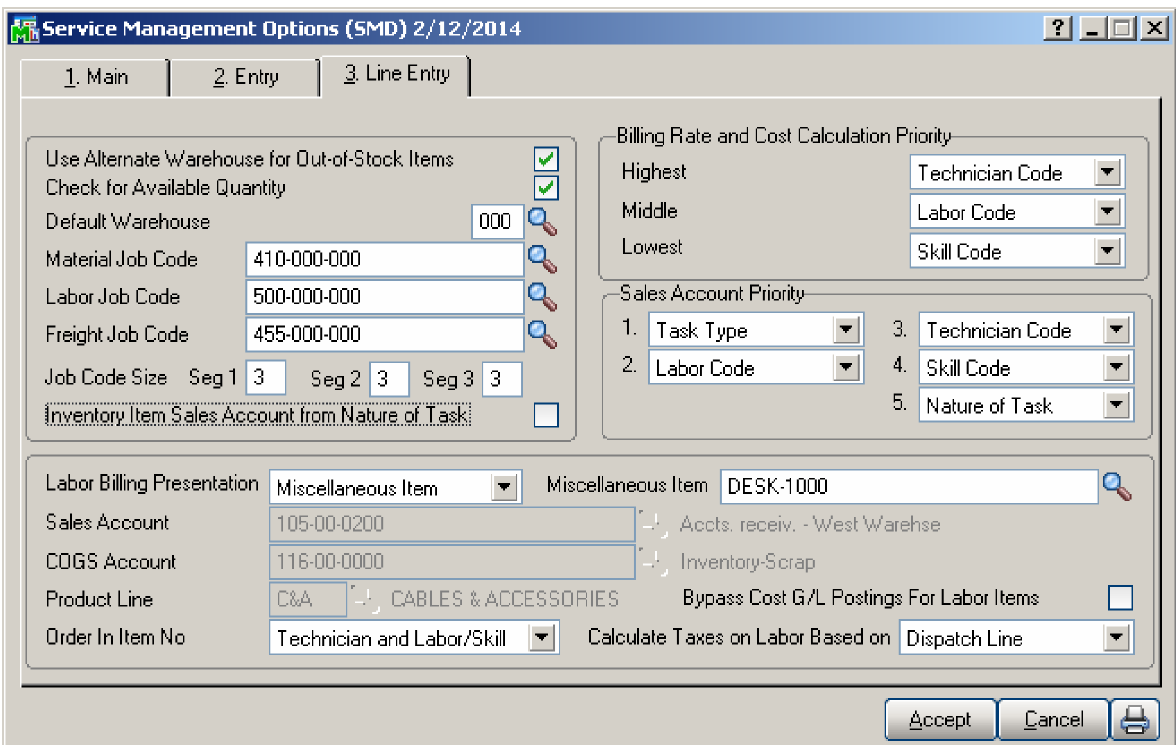
Contract is Required- Select this checkbox to require Contract entry when creating **a** Task in the **Task Data Entry.** Leave it blank if you are going to create tasks without Contract.

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.

Line Entry Tab



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 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.

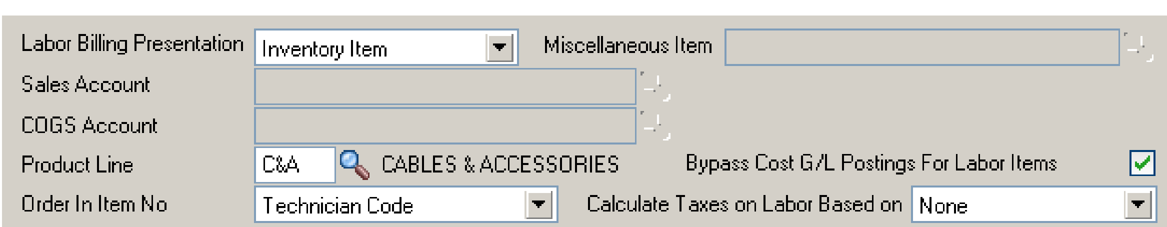
You can add new codes in the **Job Codes Maintenance** program in the Service Management Main menu.

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.



- 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 **Labor 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.

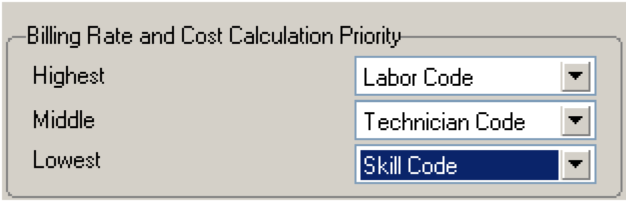
- If **Special Item** is selected, the system will load a Special Item line to the **Sales Order/SO Invoice** generated based on the **Dispatch Labor/Skill** line.
    - The **Sales** and **COGS Accounts** entered here will be applied to the Special Item line loaded in the Sales Order/SO Invoice if no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

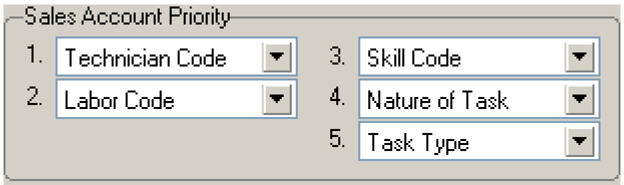
- **None**-means the **Tax Class** will not be shown on the **Dispatch Line** and it will be set to “NT” for the line item loaded in the Sales Order or Invoice transaction.
- **Dispatch Line**-means the **Tax Class** specified on the Dispatch Line will be carried over to the corresponding line item loaded 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.

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.

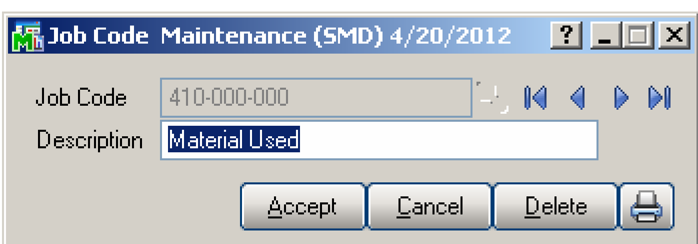


G/L accounts are set in the **Technician Code Maintenance**, **Labor Code Maintenance**, **Skill Code Maintenance**, **Nature of Task Maintenance** and **Task Type Maintenance**. The first in the list will be used if on file, otherwise the second will be used, etc.

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, Charge Code 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.

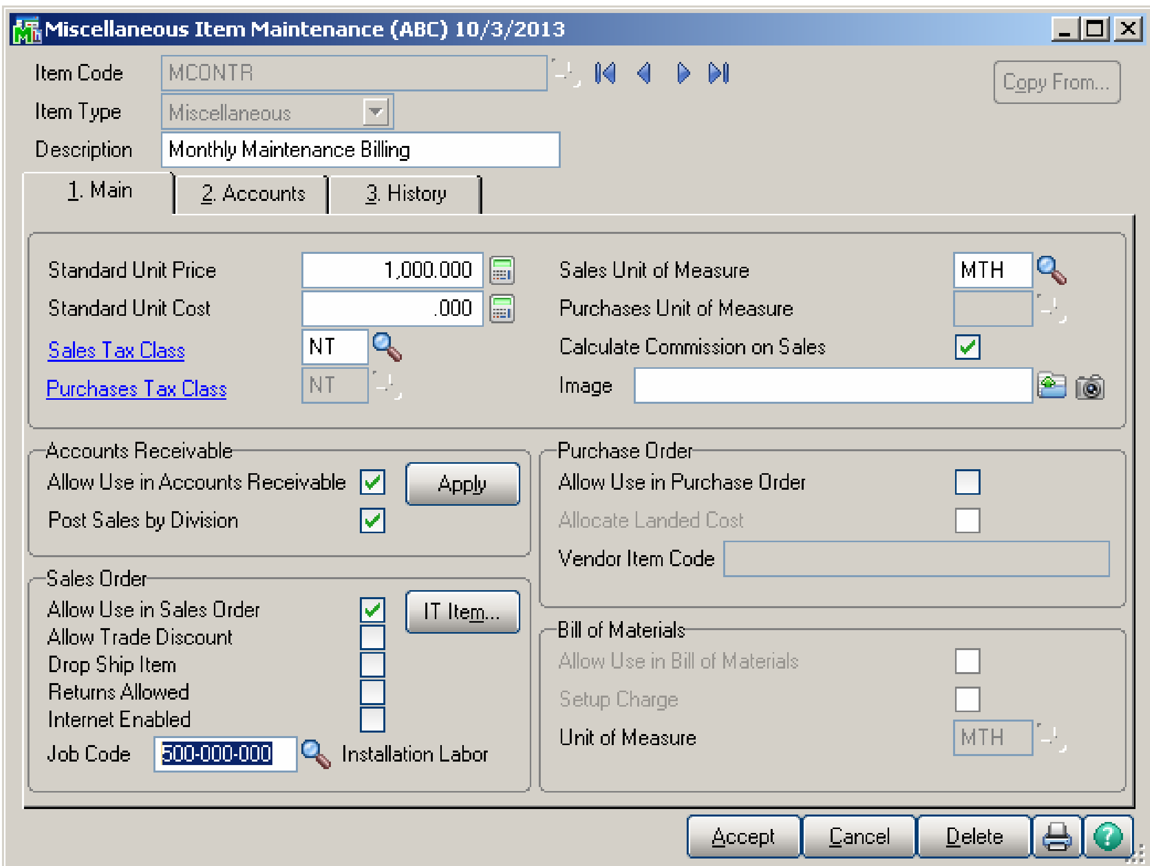


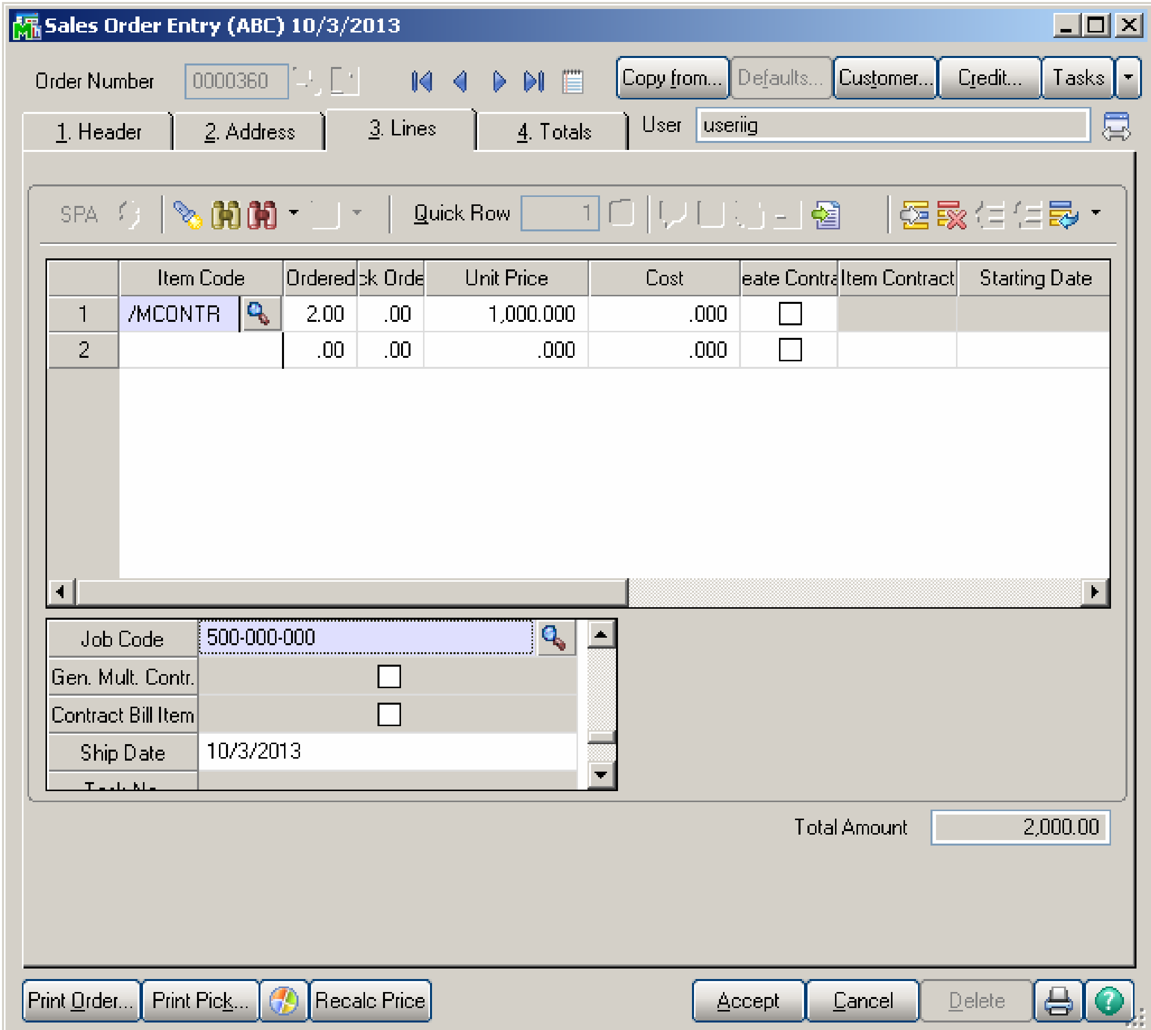
If no Job Codes are assigned to inventory items or charge codes, the default job codes specified in **Service Management Options** will be used for material or labor items.

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 has been added on the Main tab of the Miscellaneous **Item Maintenance** to allow assigning **Job** Codes to **Miscellaneous Items** and **Charges** to be used as default in the Sales Order/Invoice.

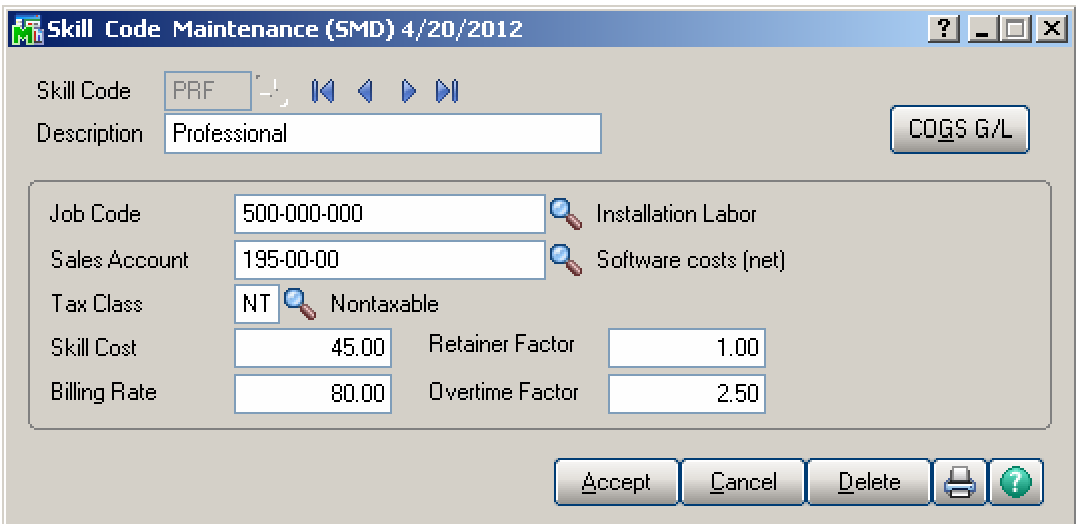



Sales Order Entry (ABC) 10/3/2013
Order Number 0000360
Copy from...
Defaults...
Customer...
Credit...
Tasks
1. Header
2. Address
3. Lines
4. Totals
User useriig
SPA
Quick Row 1
Item Code
Ordered
Unit Price
Cost
Item Contract
Starting Date
/MCONTR
2.00
1,000.000
Job Code 500-000-000
Gen. Mult. Contr.
Contract Bill Item
Ship Date 10/3/2013
Total Amount 2,000.00
Print Order...
Print Pick...
Recalc Price
Accept
Cancel
Delete

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.



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).

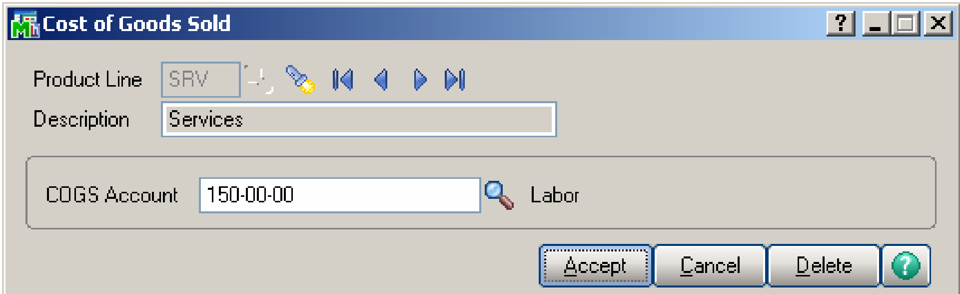
Billing Rate is the billing rates for labor items subject to contract settings or the billing rate calculation priority set-up in **Service Management Options**.

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.

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.

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



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 G/L** button is available only if the **Labor Billing Presentation** is set to **Inventory Item** in the **Service Management Options**.

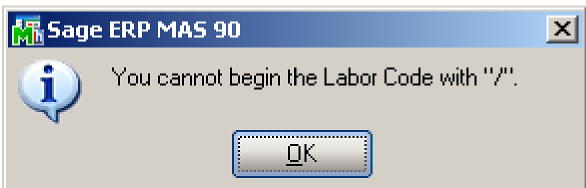
The COGS Account specified for current Product Line is used for the generated inventory items if the **Product Line** matches the one set for Inventory Item in the **Service Management Options**.
If there is no account set for that Product Line, the program uses the **COGS Account** specified for **Product Line**.

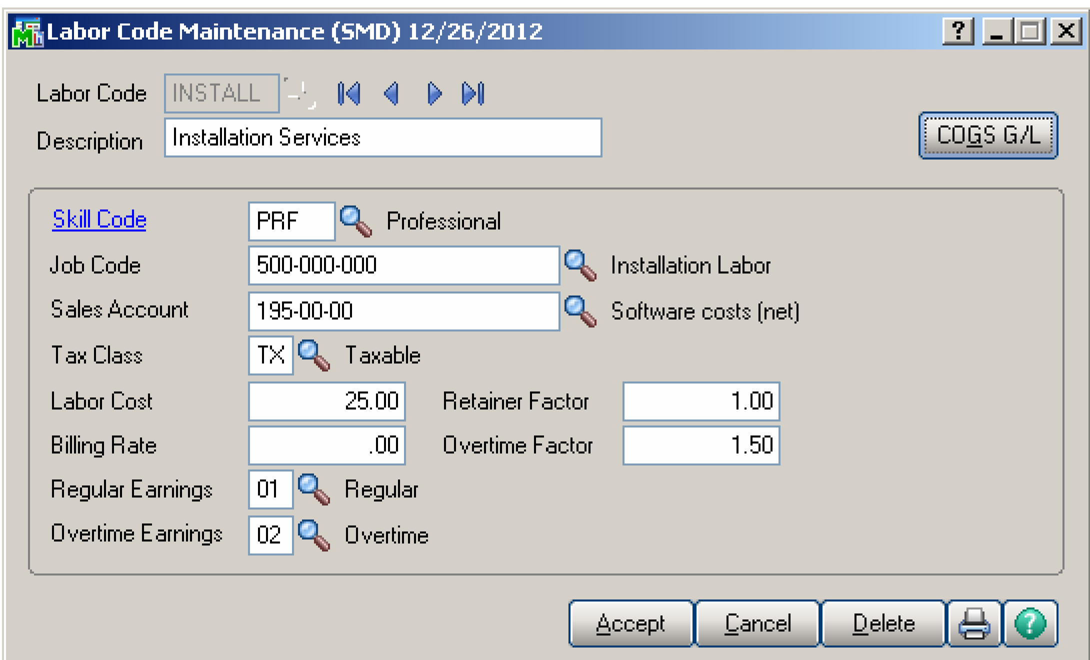
Labor Code Maintenance

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 if a labor code starting with "/" is entered:





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**.

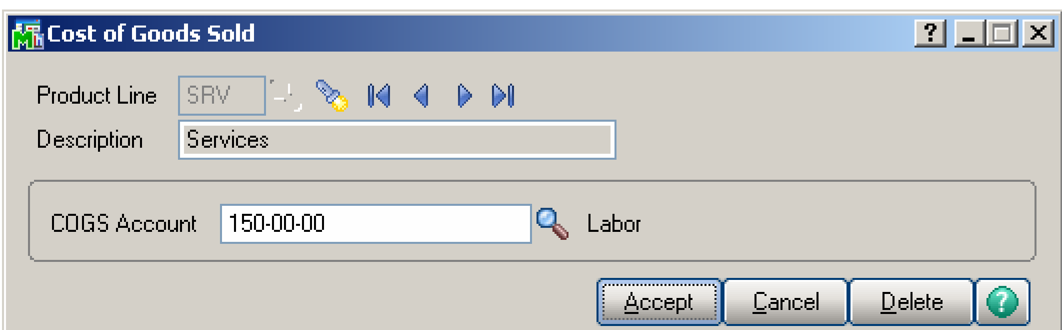
Select the **Regular** and **Overtime Earnings Codes** from the **Earnings List**. Earnings Codes are set in the **Earnings Code Maintenance** under the **Payroll Setup** menu.

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.



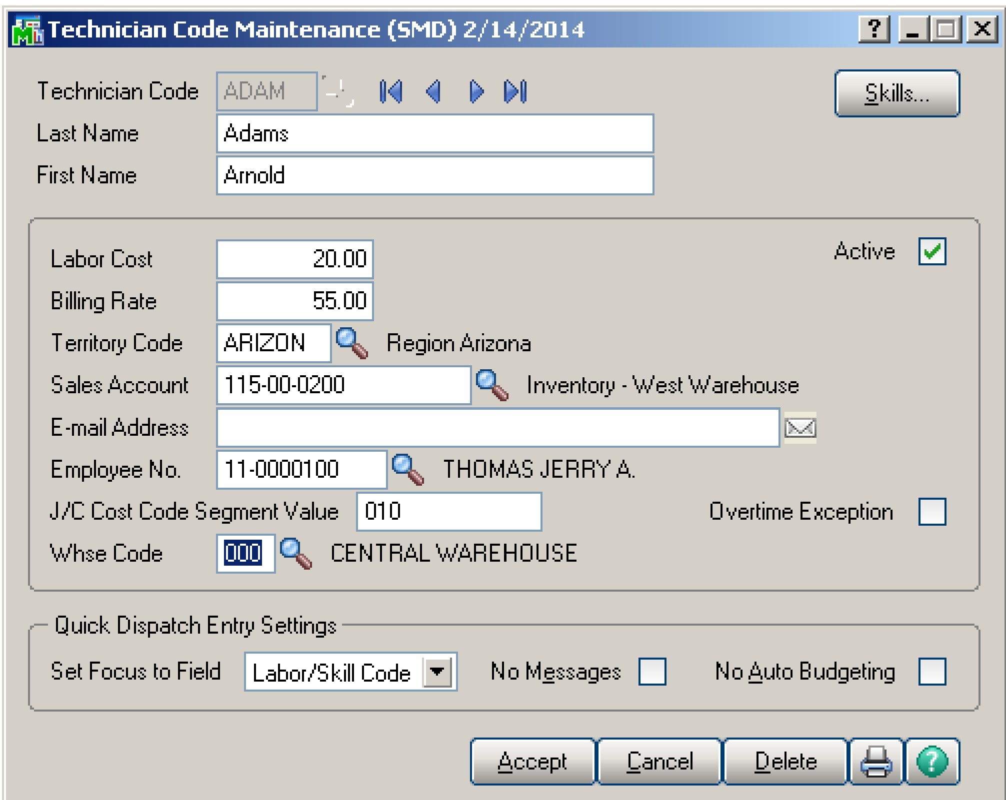
Different G/L accounts can be set for different **Product Lines** and for all the Product Lines (empty Product Line) not having separate accounts specified.

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.



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 not selected 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**.

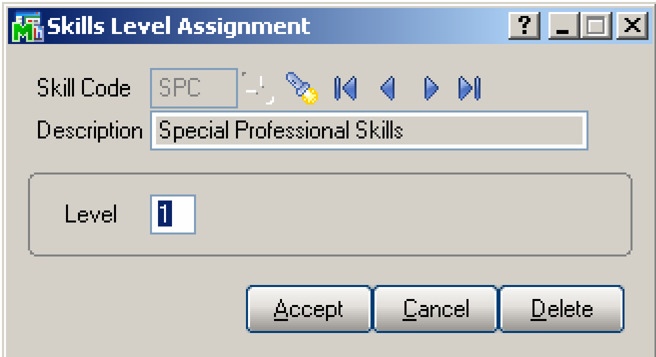
Check the **No Messages** box to suppress displaying information and warning messages and memos when selecting Dispatch Lines.
The setting of the **No Messages** box is stored for each Technician Code separately.

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.

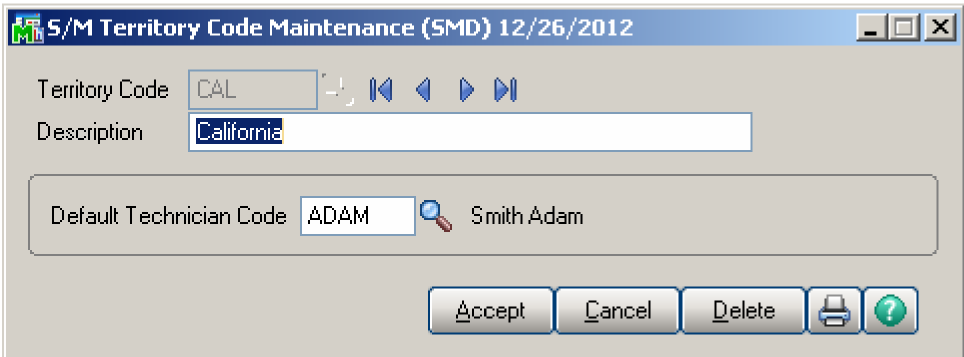


Enter the desired **Skill Code** for the technician.

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

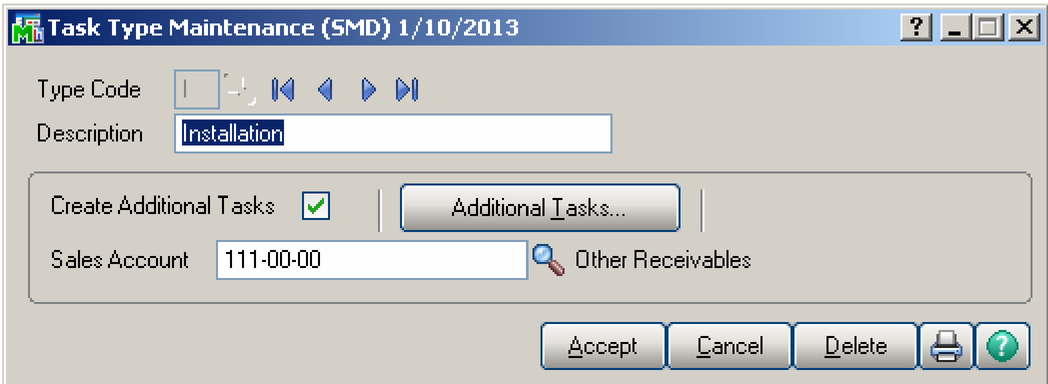
The technician code specified in the **Default Technician Code** field of **Territory Code Maintenance** is the default technician for current territory.



The **Territory Code** can then be used as a selection criterion in the **Quick Dispatching, 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.

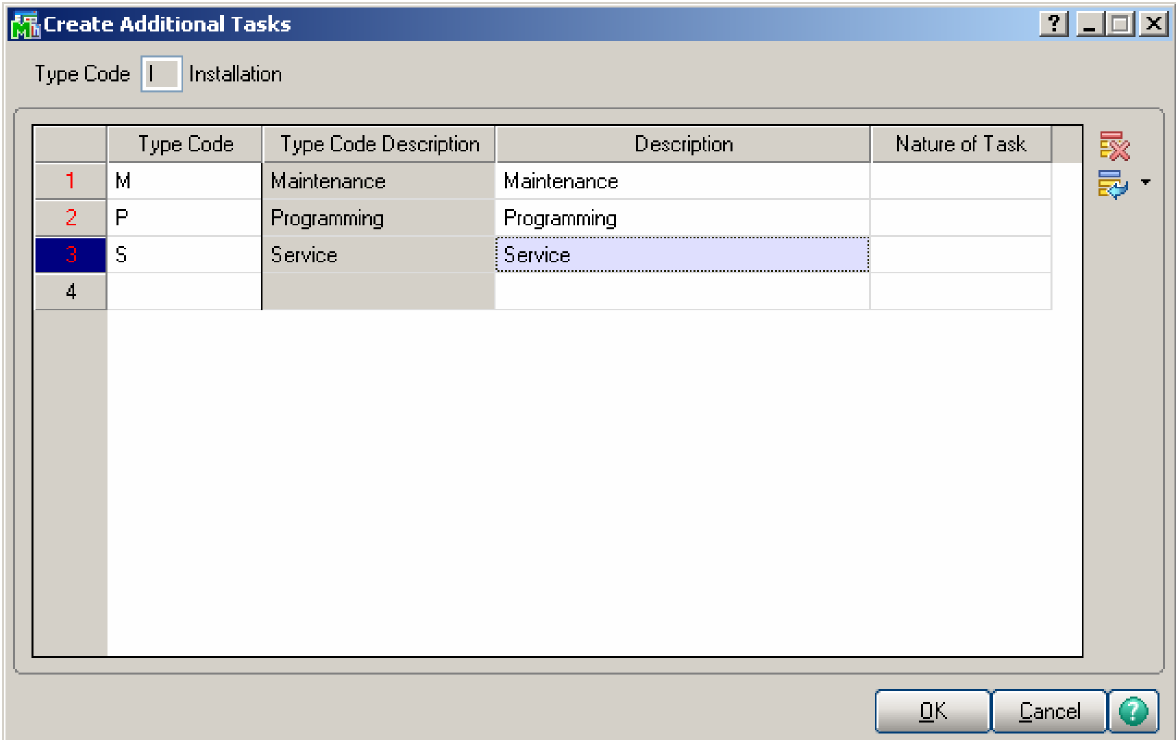


Sales Acct is used for postings when closing dispatches with labor (based on the priority in **Service Management Options**).

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**.

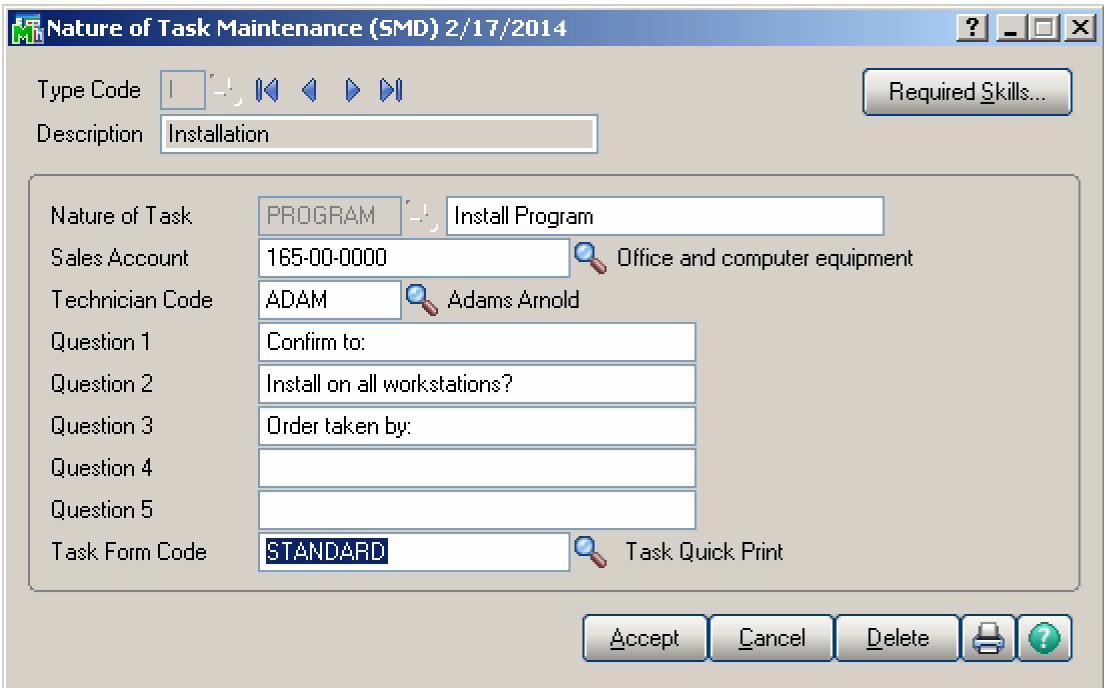
If you delete all the additional tasks in the list, and close the **Create Additional Tasks** screen, the check box in the **Task Type Maintenance** will be automatically cleared. You must check it anew and click the button, if you want to add tasks after that.

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


Create Additional Tasks
Type Code I Installation
Type Code
Type Code Description
Description
Nature of Task
1 M Maintenance Maintenance
2 P Programming Programming
3 S Service Service
4
OK
Cancel

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.



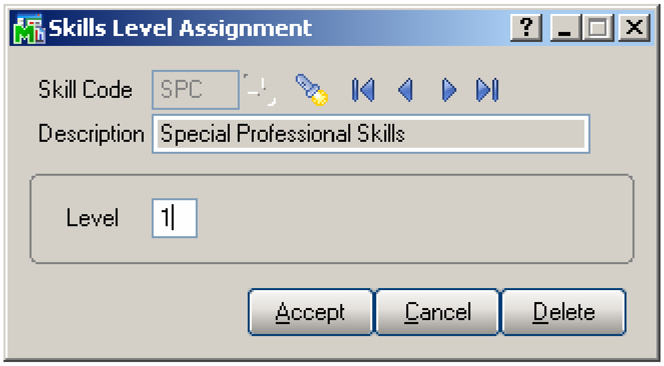
Enter **Task Type** or select it from the lookup for the Nature of the Task you wish to maintain.

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.



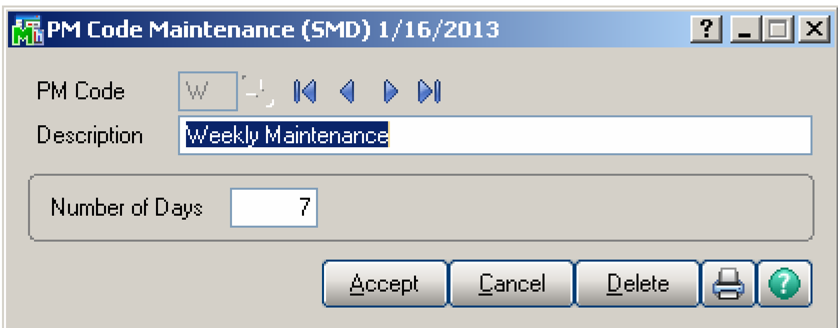
Question 1 to 5 editable text fields are intended for entry of questions tied to current Nature of Task. When creating Task the user will be able to enter the answers to those questions in respective fields added on the Nature of Task Answers screen launched from the Task Data Entry. Nature of Task Questions/Answers screen is accessible also on the Contract Data Entry and Contract Item Maintenance for Preventive Maintenance type Contracts.

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.

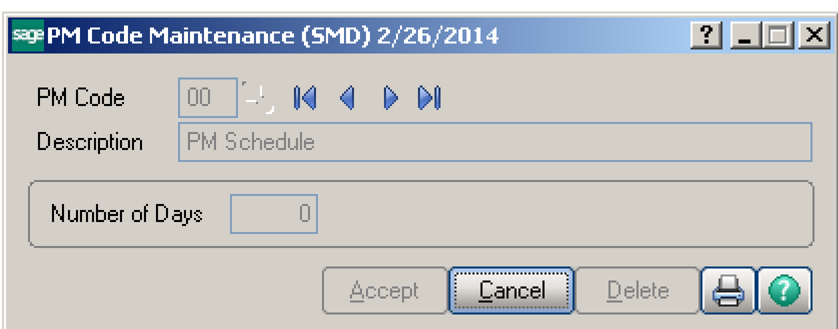


Enter the desired **PM Code** you wish to enter or maintain.

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.

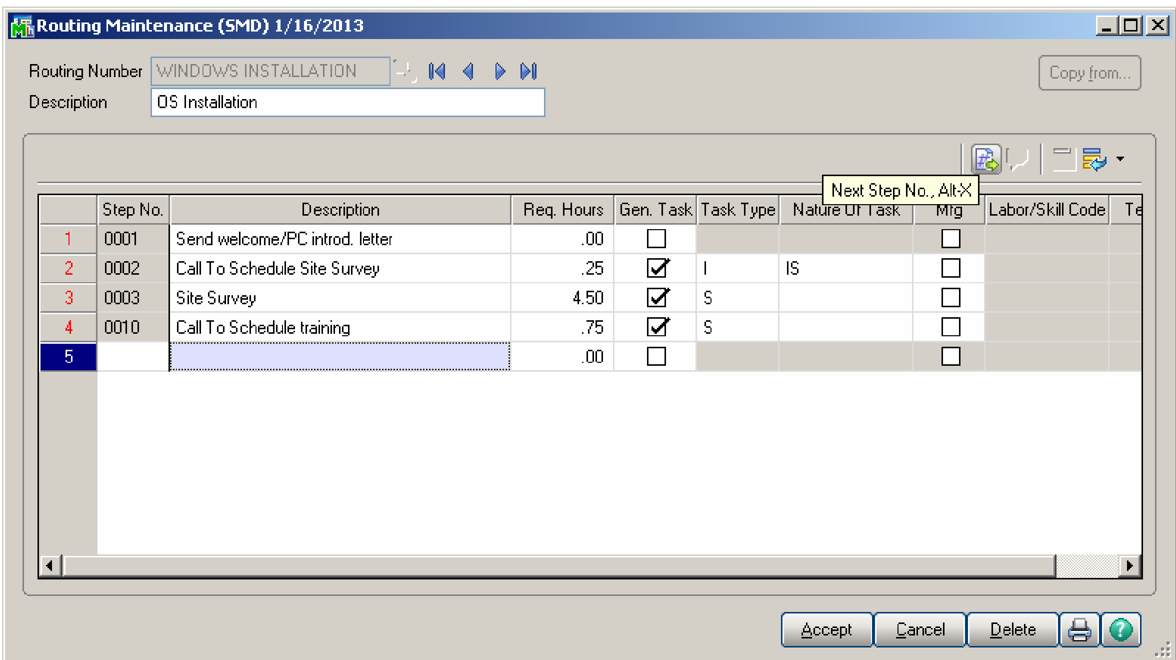
“00” PM Code is automatically added once the PM Code Maintenance is accepted. It is used for PM scheduling in the Contract Entry.



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.



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.

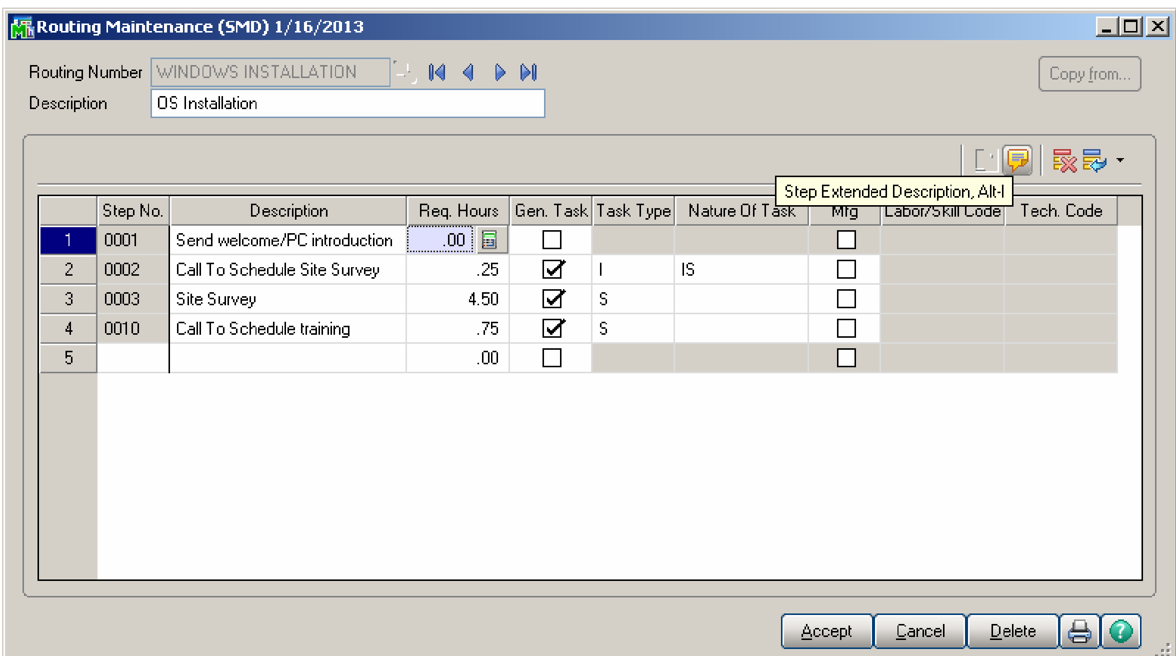
If the **Step Number** represented by the next incremented value already exists, then the difference between the current step number and the step represented by the multiple will be divided by two.

If you are entering the first step number for a new routing, clicking the **Next Number** icon will insert **Step Number 0000** 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 **Routing Maintenance Description** field. Clicking the button allows you to see the additional characters.

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

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



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.

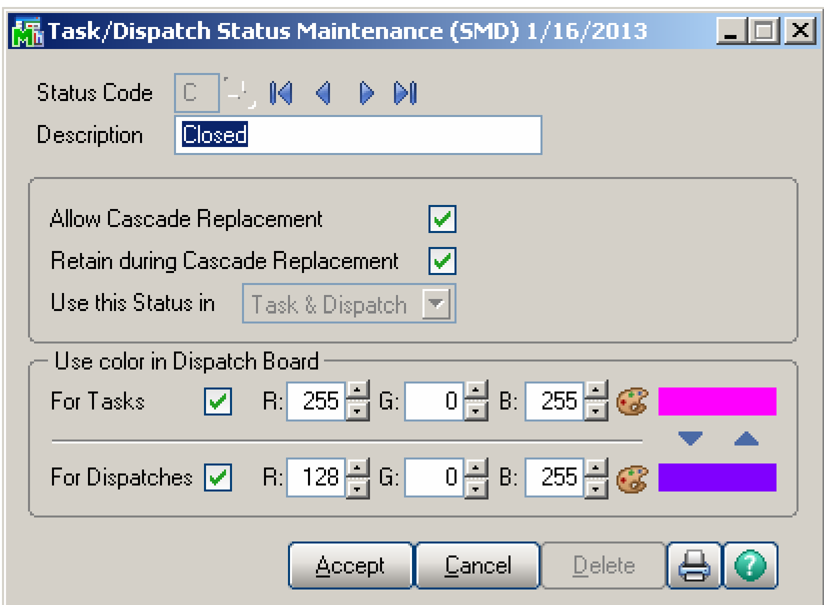
The **Mfg** (**Manufacturing)** check box is available only for Steps with the **Generate Task** option selected.

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 automatically generated when generating Task, using the specified **Labor/Skill** and **Technician** Codes.

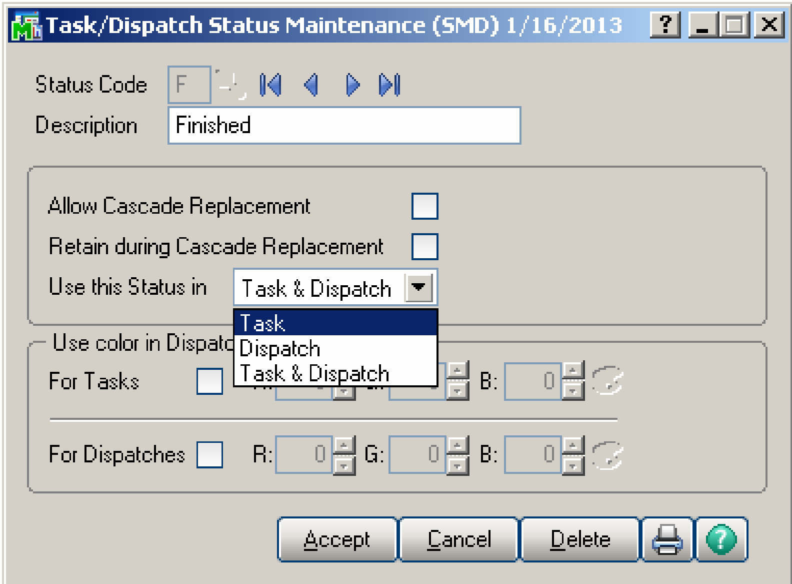
Task/Dispatch Status Maintenance

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.

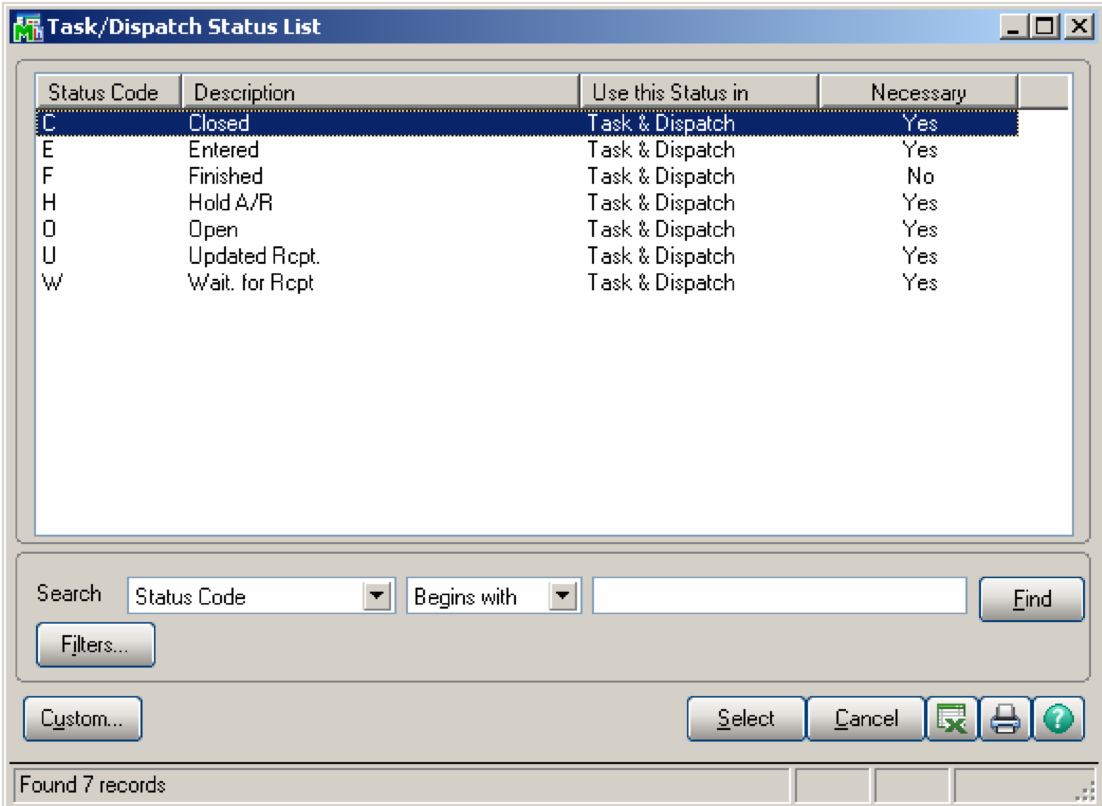


Check the **Allow Cascade Replacement** box if you want to have the selected Status applied to all Dispatches associated with the task when applying it to the Task. This checkbox is disabled if the **Use this Status in** option is set to **Dispatch**.

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**.



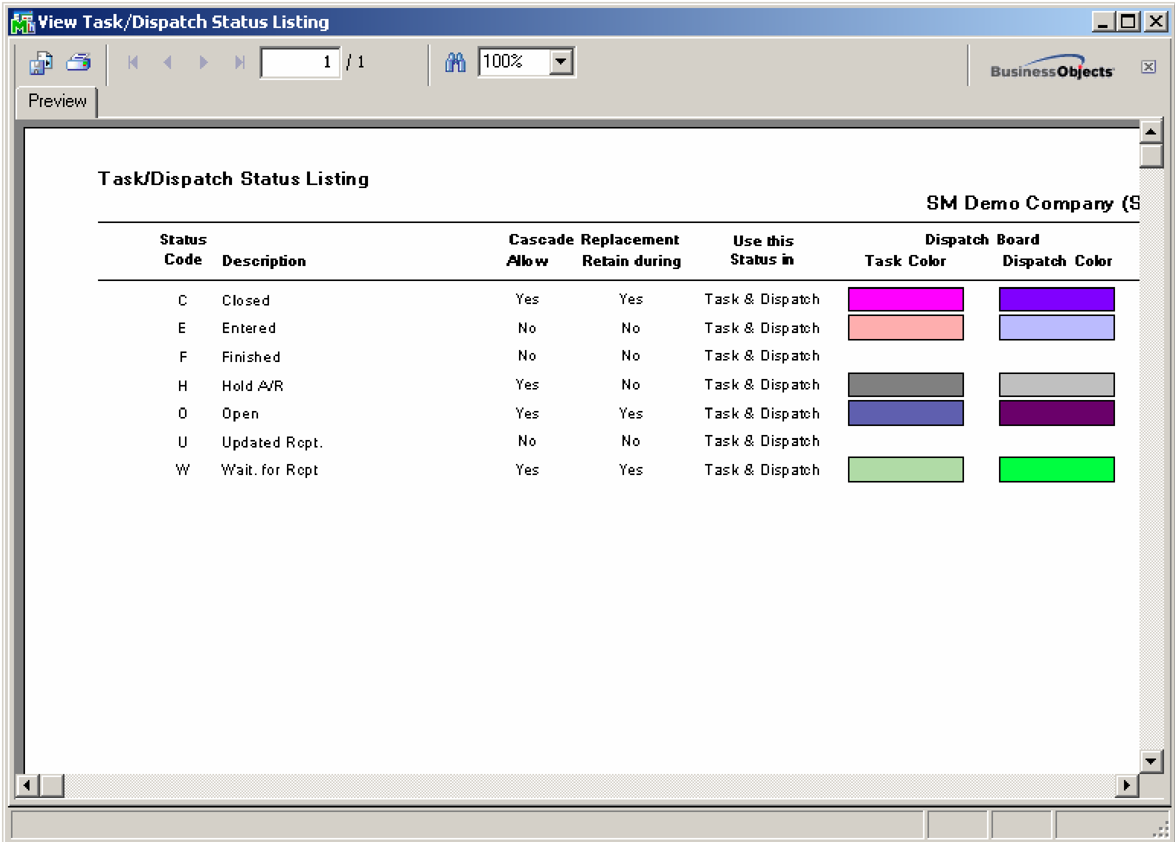
Through the **Status Code** Lookup button the **Task/Dispatch Status List** is opened. There are several standard Status Codes that are always present in this list. Those Status Codes are set in the system upon Service Management Module setup. Besides them you can add new codes for your special needs, 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.**



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 **Dispatc**h colors are displayed also in the **Task/Dispatch Status Listing** report.



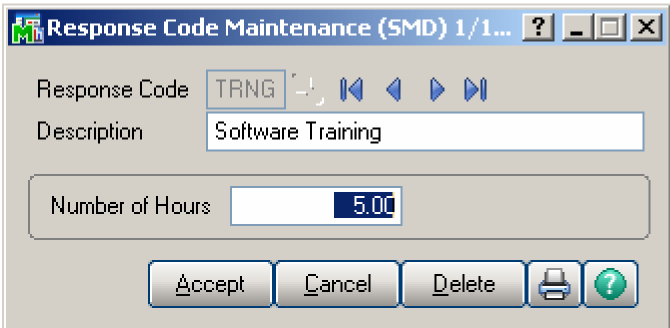
Task/Dispatch Status Listing

SM Demo Company (S

Status Code	Description	Cascade Allow	Replacement Retain during	Use this Status in	Dispatch Board Task Color	Dispatch Color
C	Closed	Yes	Yes	Task & Dispatch		
E	Entered	No	No	Task & Dispatch		
F	Finished	No	No	Task & Dispatch		
H	Hold A/R	Yes	No	Task & Dispatch		
O	Open	Yes	Yes	Task & Dispatch		
U	Updated Rcpt.	No	No	Task & Dispatch		
W	Wait. for Rcpt	Yes	Yes	Task & Dispatch		

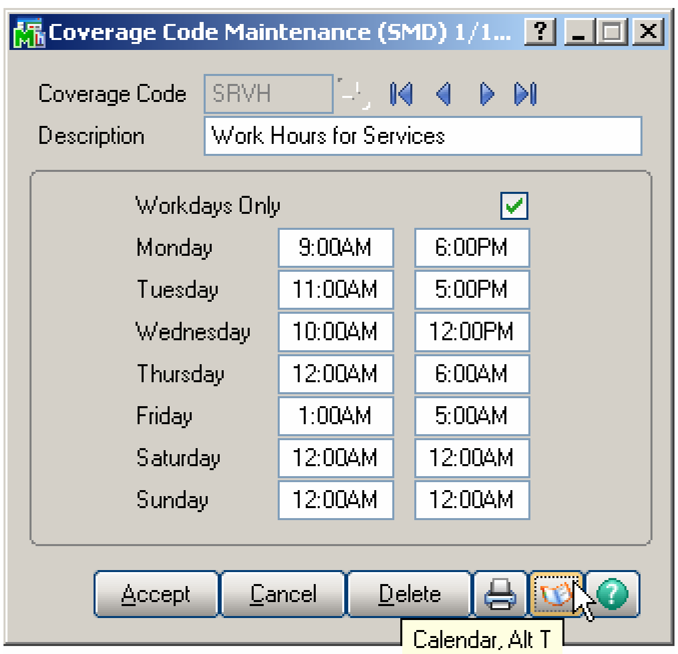
Response Code Maintenance

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

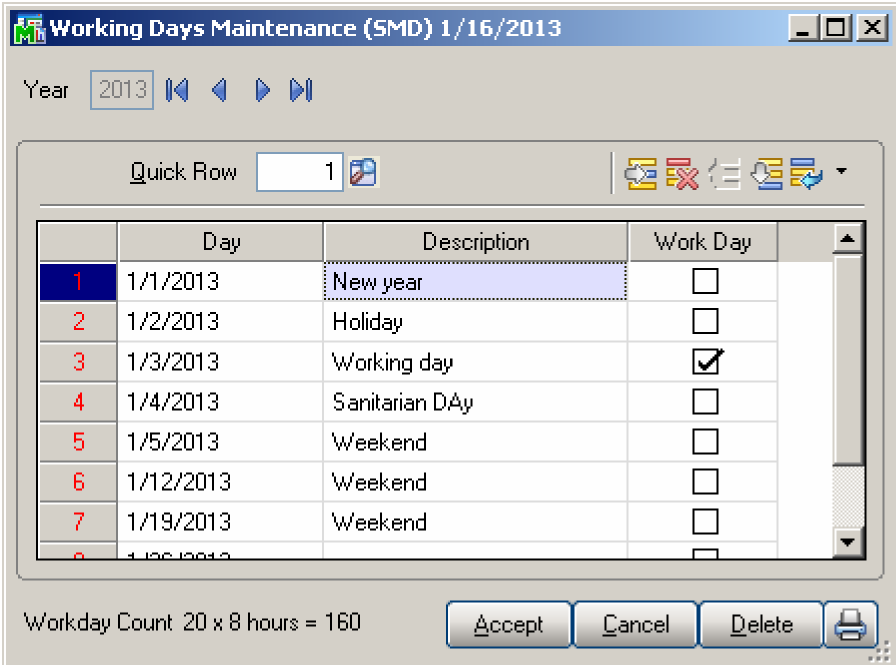


Coverage Code Maintenance

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.



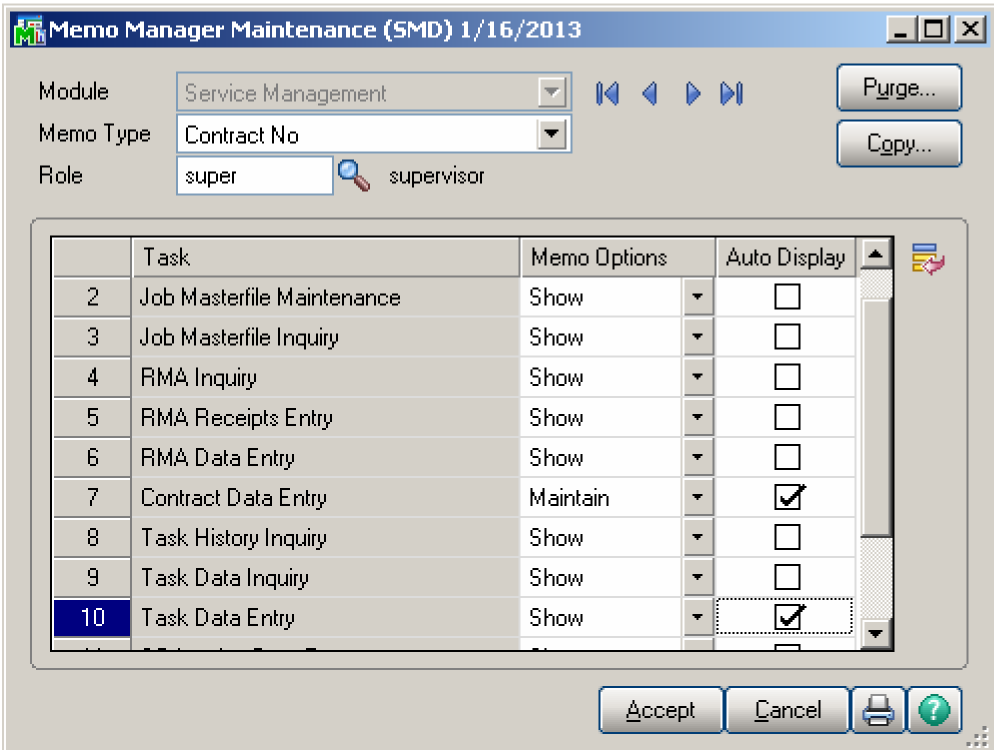
Clicking the **Calendar** button displays the **Working Days Maintenance** screen, where you can specify the Workdays and Holidays.



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

Memo Manager Maintenance

The **Memo Manager Maintenance** program allows setting Memo Options to be shown maintained in the selected Tasks.

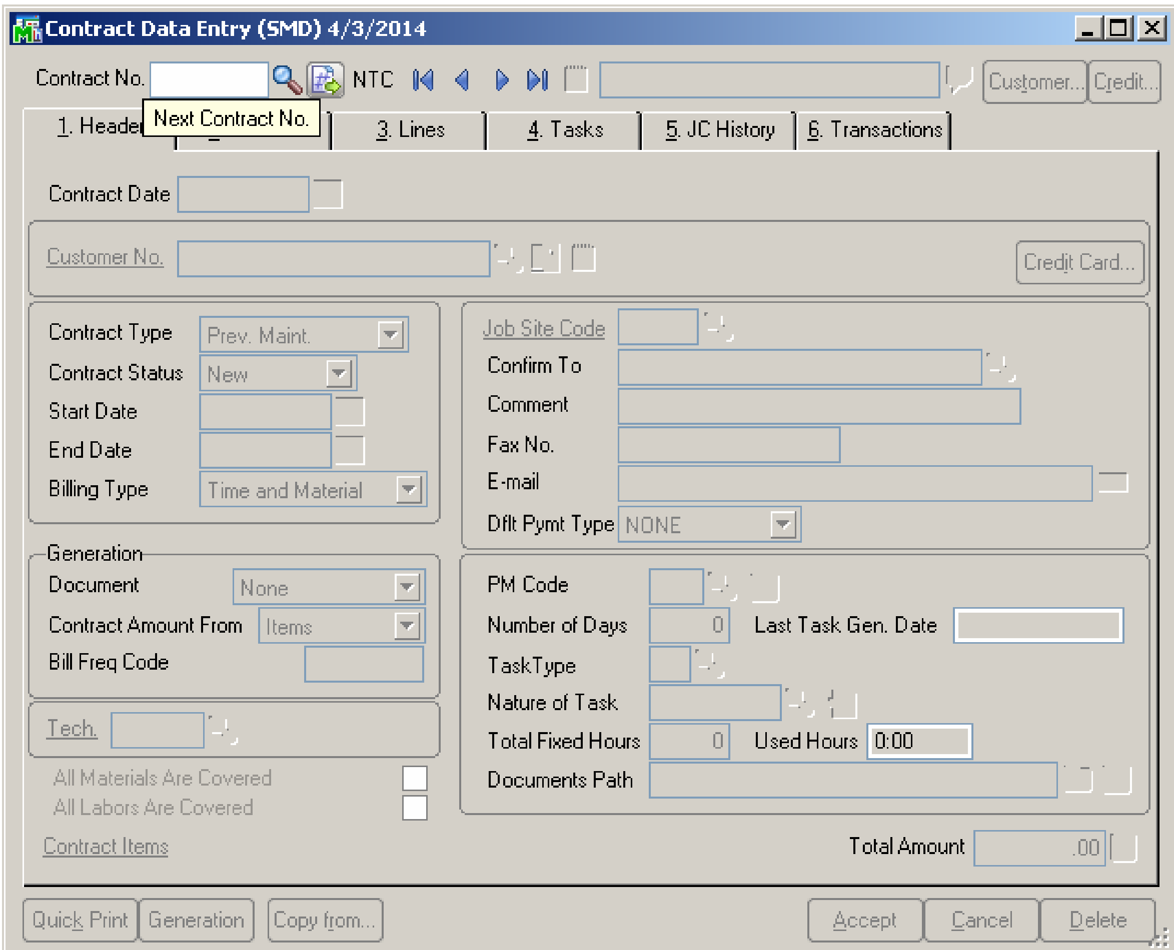


The Main Menu

Contract Data Entry

Use the **Contract Data Entry** program to enter new contract or maintain existing contracts and view current contract information.

Enter a Contract number, or click the Lookup button to list all contract numbers. Click the **Next Contract Number** button to automatically increment the contract number for a new Contract.



Use the **NTC Button** to accept the next new **Template Contract Number.** A template contract is used to generate a regular 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. 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.

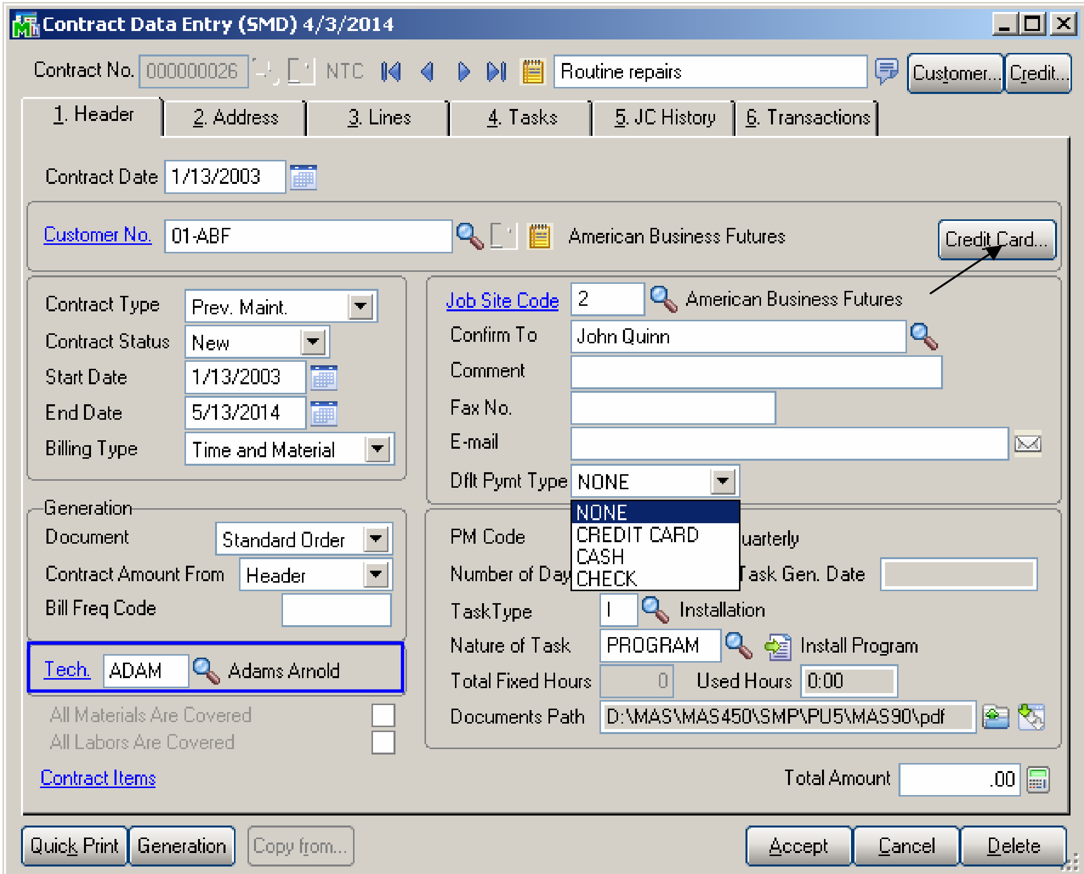
The **Customer** button enables access to the Customer Maintenance.

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. Be careful to not 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.

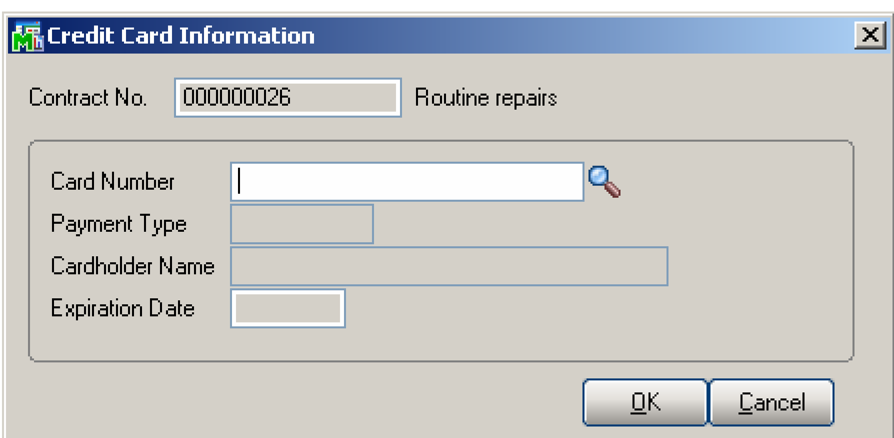
The **Copy From** button allows for creating new Contract by copying from an existing one.

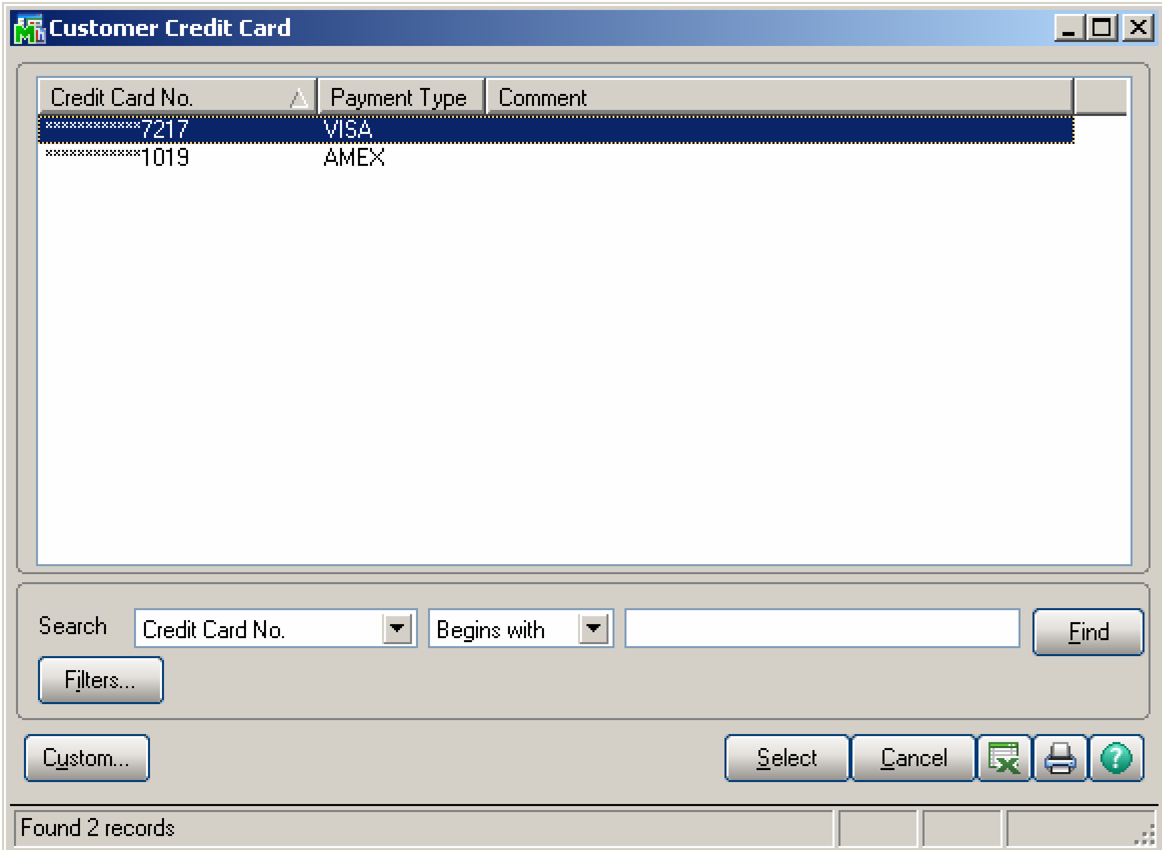
Header Tab

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.



Press the **Credit Card** button to open the Credit Card Information screen and add Credit Card number and the Payment Type for current Contract. The Credit Cards added in the Customer Credit Card Maintenance are available here and the user can select from the Card Number lookup.





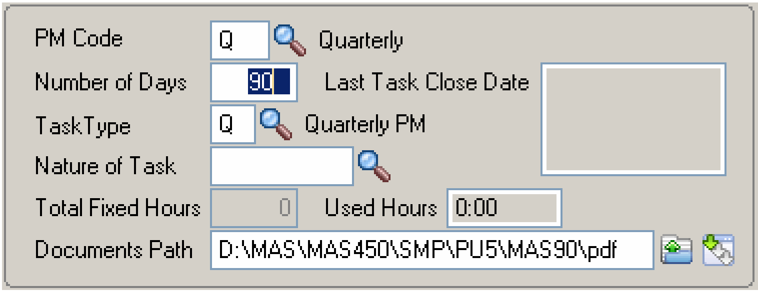
When Task is created for the Contract having Credit Card and Payment Type specified the Credit Card information is loaded into the Task's Credit Card information screen.

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

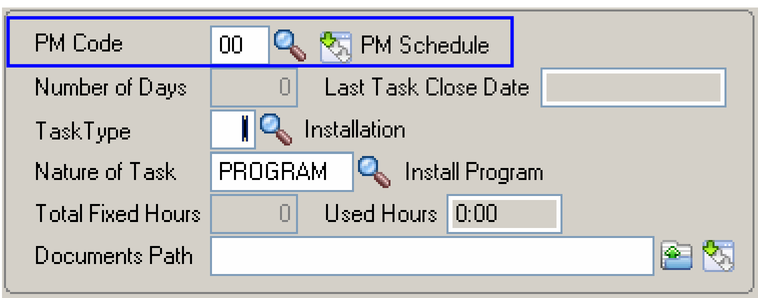
Based on the selected contract type respective fields are enabled on the Contract Data Entry:
If **Prev. Maintenance (Preventive Maintenance)** type is selected, the PM Code entry is required. Enter the PM Code to set the frequency for the preventive maintenance tasks to be performed. Based on the specified **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.

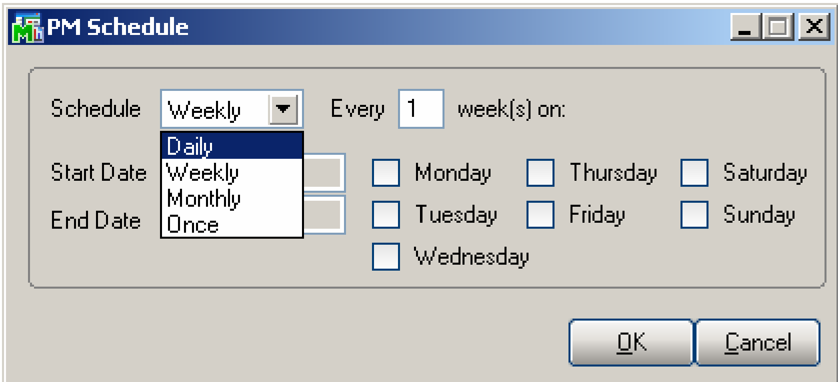


PM Schedule

"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.



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

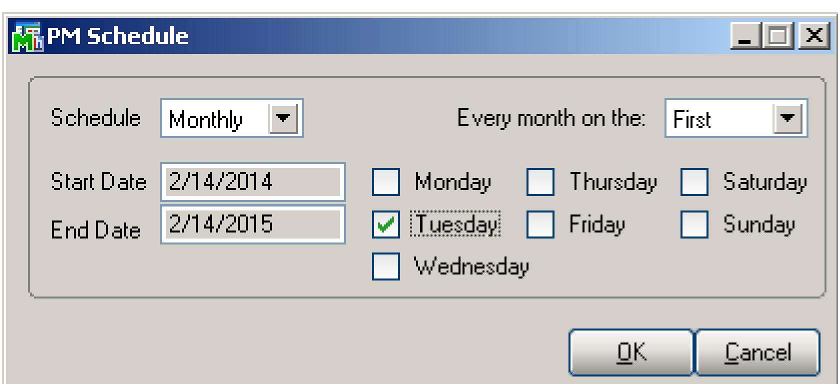


From the **Schedule** drop-down select the occurrence of the PM task
Start Date – is populated with the Contract Start Date
End Date- is populated with the Contract End Date

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.

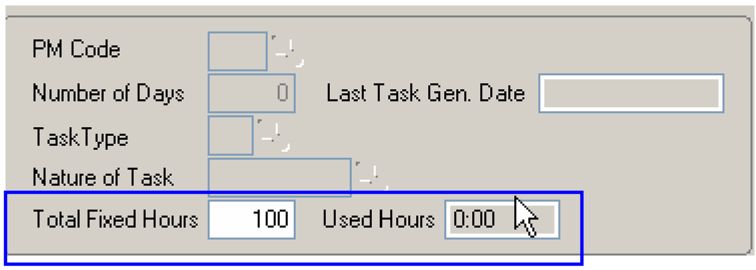
Days of the Week - Select the day of the week for PM Task to be generated. These check boxes are available only if Weekly or Monthly is selected at the Schedule field.

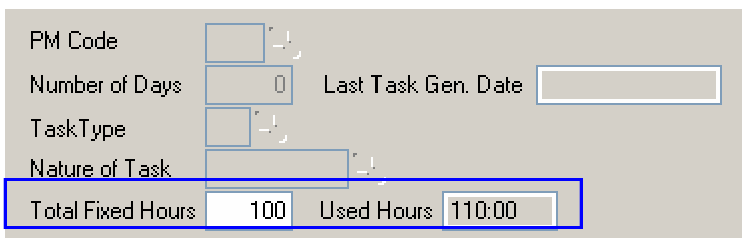
Every Month on the - Select the week of the month for generating PM Task. For example, to schedule the Task to be generated every first Tuesday of the month, select **Monthly** at the Schedule field, select First at this field, and select the Tuesday check box. This field is available only if Monthly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

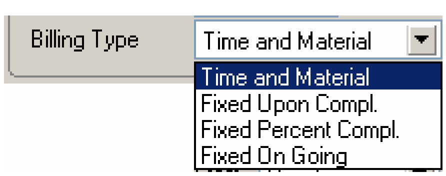




In the Task Data entry the user is prompted about the hours remaining unused for current Contract upon selecting the Task created for current Contract.

The **Documents Path** is defaulted to the **Contract Documents Path** set in the **Service Management Options.**

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



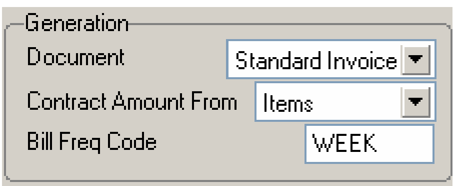
- **Time and Material** - the Invoice amount will be calculated based on the time spent and material used.
- **Fixed Upon Completion** - the payment will be done in the fixed amount and on completing the work.
- **Fixed Percent Completion** - the payment will be done by percents of completing the work.

- **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 a letter or number for the **Bill Freq Code** to denote a scheme of Billing Frequency. When selecting customer, this field is defaulted from the Customer and may be changed if required.

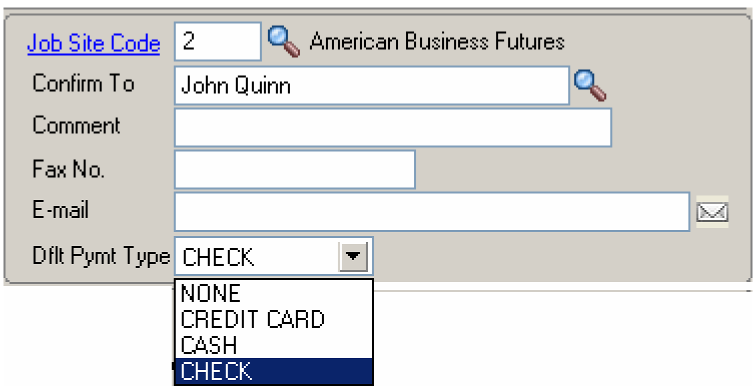
Select the **Technician Code** to have the Contract's Technician loaded as Preferred Technician of the Task created for current Contract in the Task Data Entry or generated by the Auto Generate Tasks Selection program.

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 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.
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.

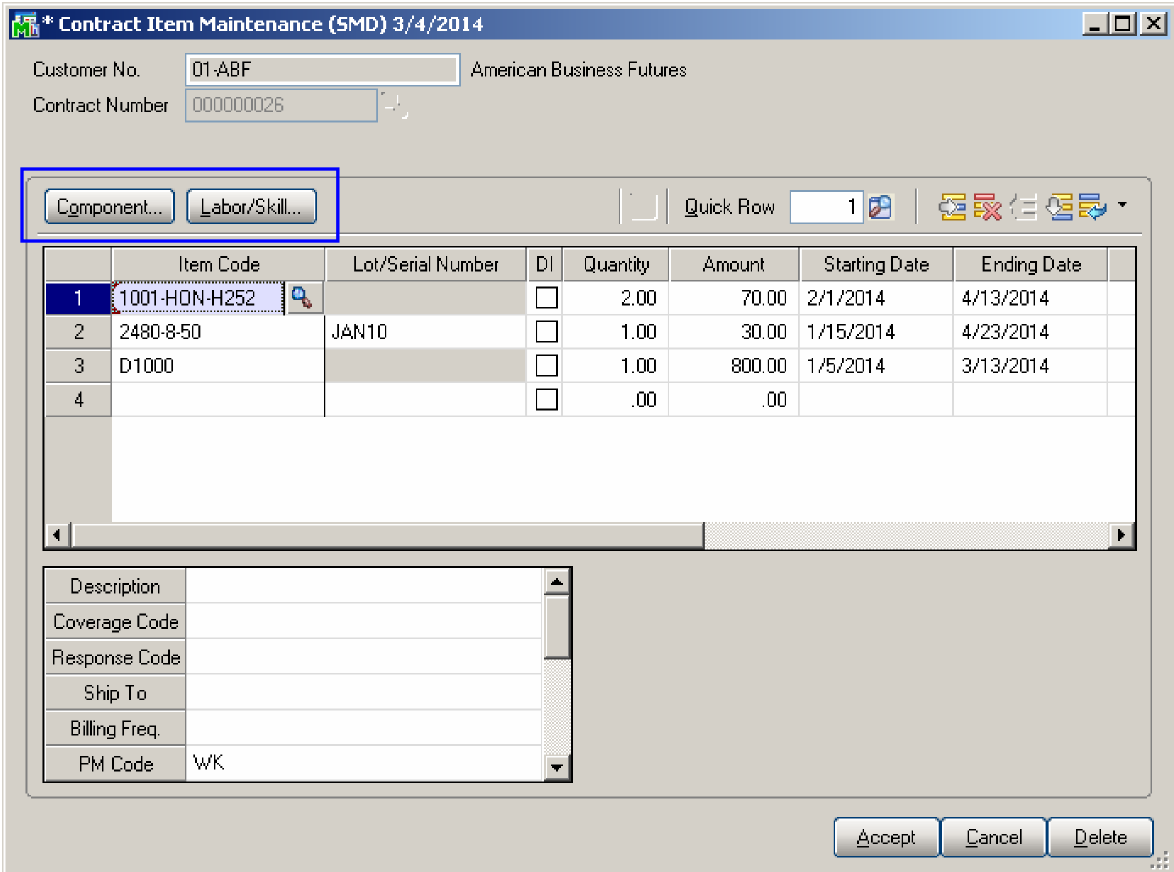
Job Sit Code- Enter a location code to automatically load the Shipping Address defined in the Customer Ship To Address Maintenance. Press the lookup button to list all location codes. The **Job Site Code** defaults to the Ship To location specified as the Primary Ship To in the Customer Maintenance.
The field hyperlink allows launching the **Customer Ship To Address Maintenance**.
A new **Job Site Code** can be added on the fly.



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

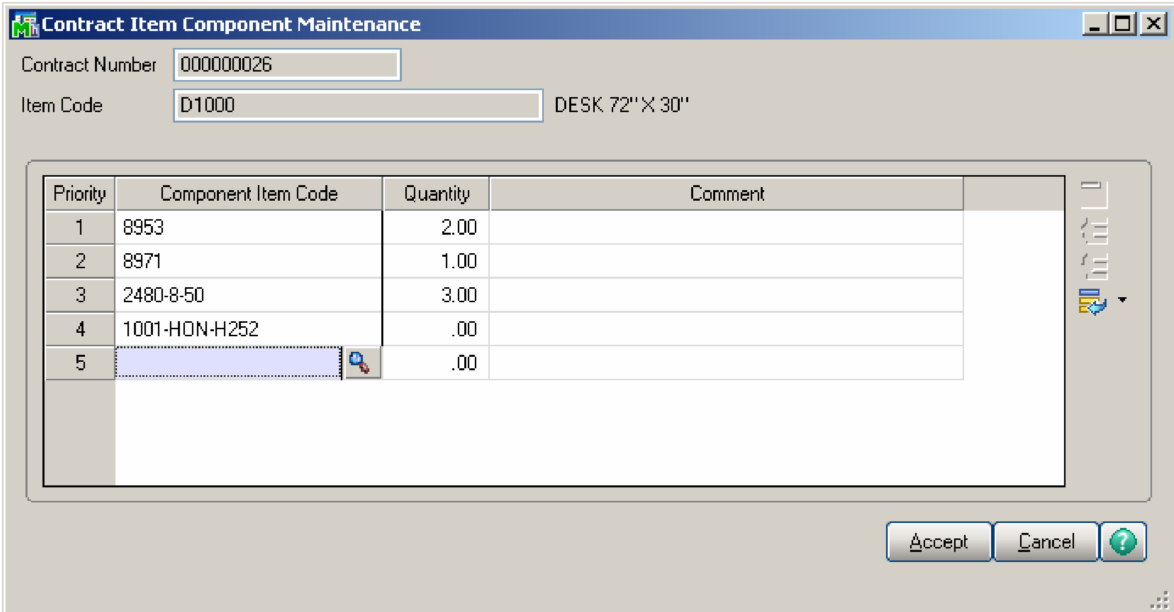
Dflt Pymt Type – select the payment type to use for the current contract. You can select **None, Credit Card, Cash, Check** or any non-credit card payment type entered in Accounts Receivable Payment Type Maintenance.
To be able to select Credit Card payment type, it is necessary to have a Credit Card entered in the Credit Card Information screen.
The Default Payment Type selected on the Contract is defaulted to the Task generated for current Contract. If there is Credit Card entered in the Credit Card information screen any default Payment type other than Credit Card is ignored and Credit Card is loaded as the default payment type in the generated Task.

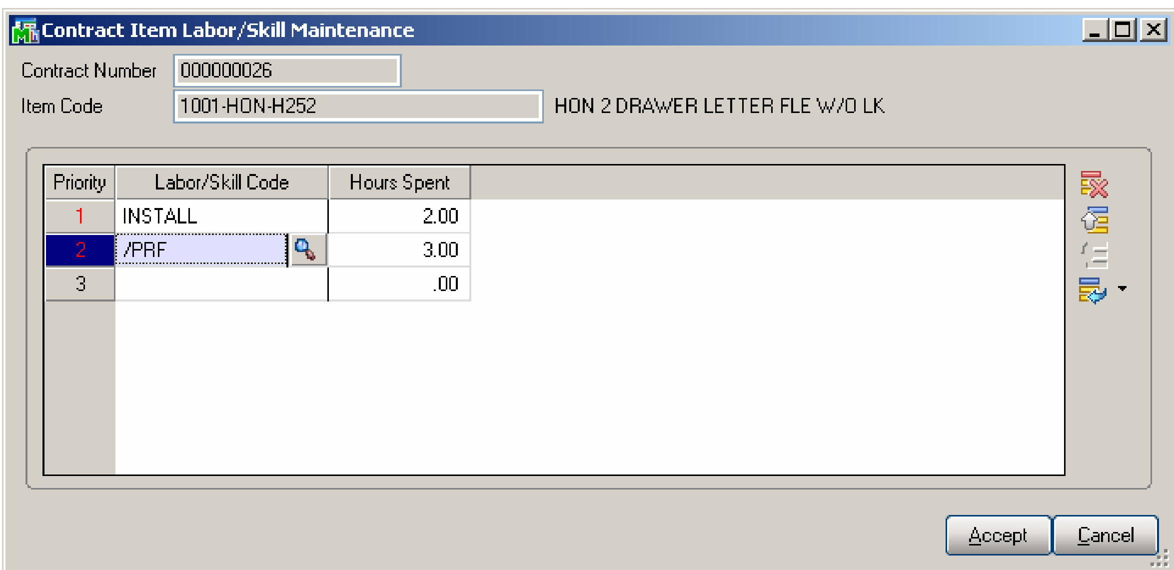
Contract Items- click this field hyperlink to launch the Contract Item Maintenance and enter the **Items** covered by the contract.



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.**

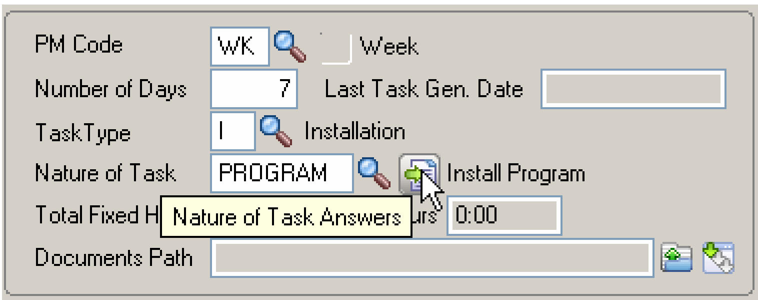




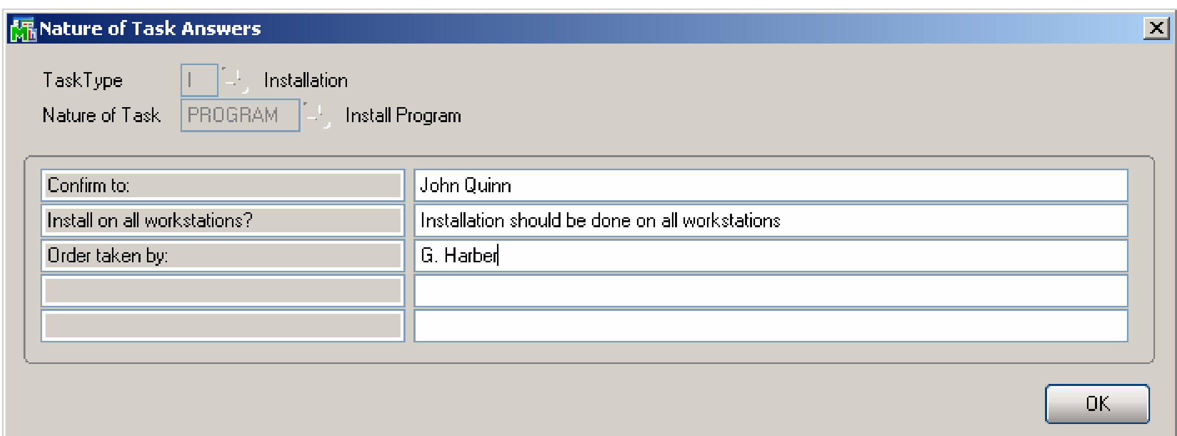
Both Inventory Item and Labor/Skill components entered here will be loaded into the Dispatch transaction generated during Task generation by the Auto Generate Task Selection program with **Generate Dispatches for all Contract Items** option turned on.

Nature of Task Answers

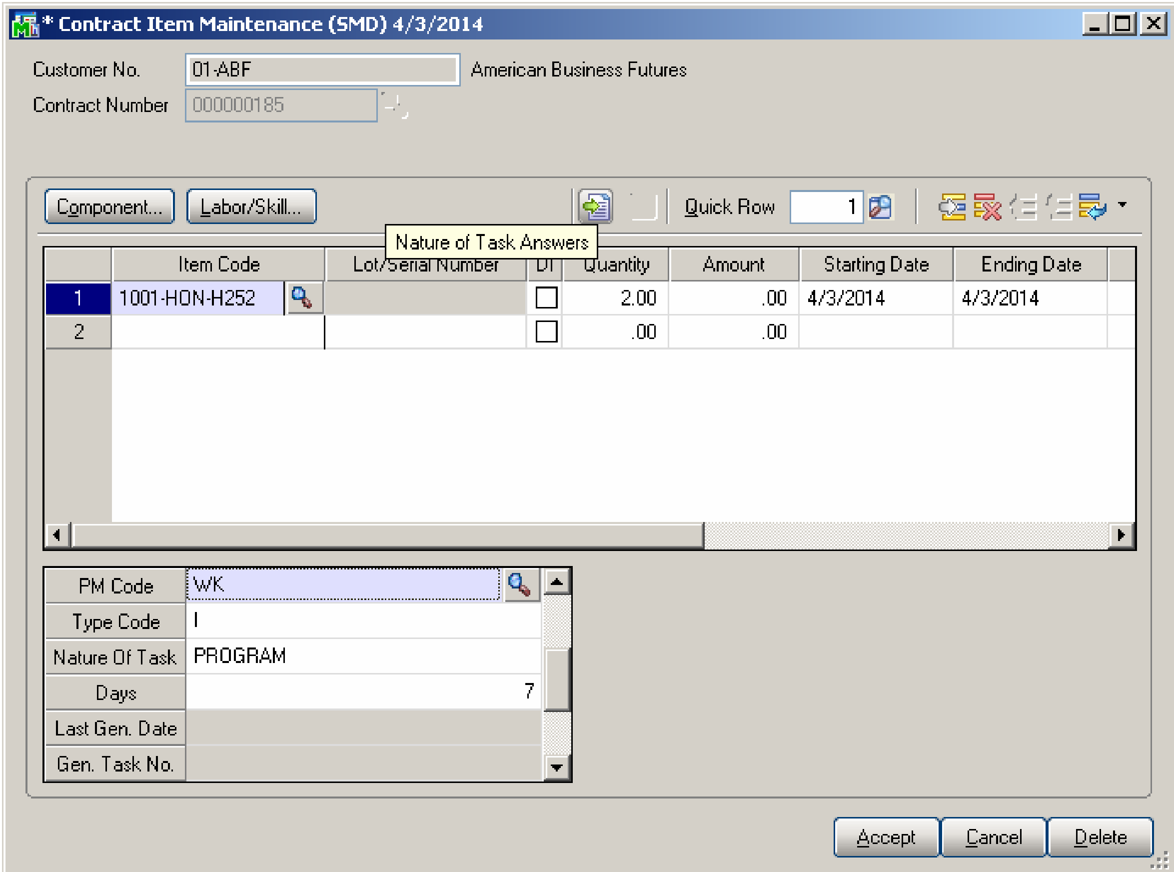
For Preventive Maintenance type Contracts the **Nature of Tasks Answers** button is enabled upon selecting a Nature of Task.



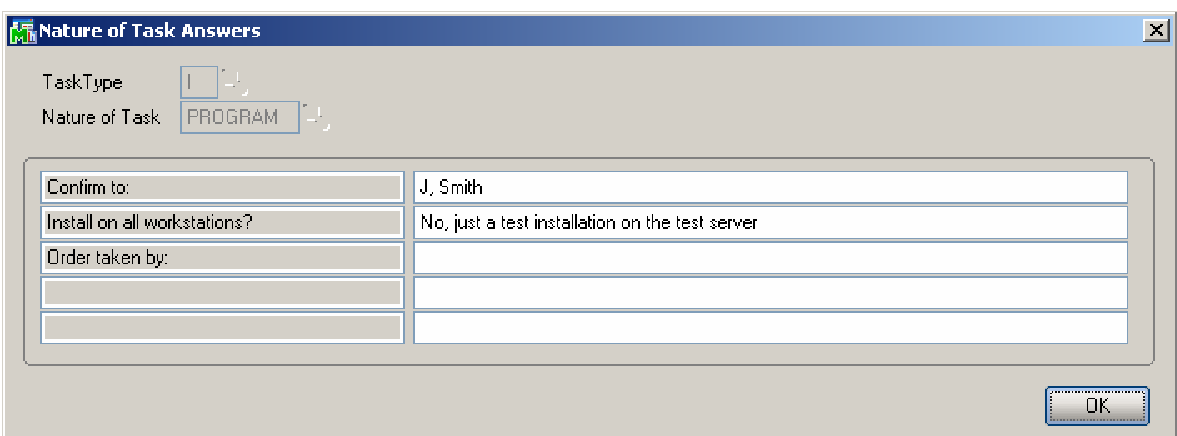
Upon pressing the **Nature of Task Answers** button respective screen is opened populated with questions (text) entered in the Nature of Task Maintenance and blank text fields for entering the answers.



The **Nature of Task Answers** screen is accessible also on the Contract Item Maintenance. In the **Contract Item Maintenance** screen the **Nature of Task Answers** button is available for the lines having a Nature of Task specified.



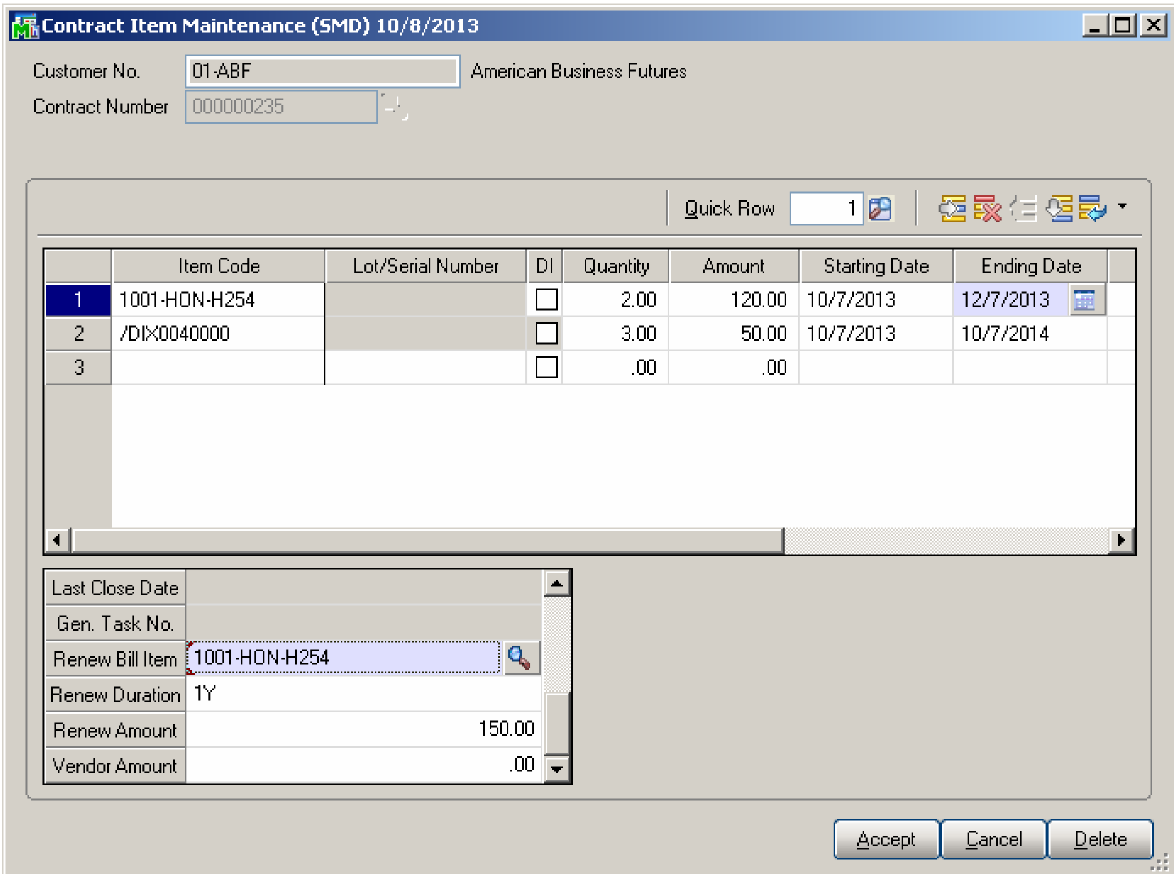
The answers entered on the Contract are loaded into the Nature Of Task Answers screen of the Task generated for PM Contracts.



The answers entered on the Contract Header are loaded to the Task generated for Contract Header and the answers entered in the Contract Item Maintenance are loaded into the Task generated for Contract Item.

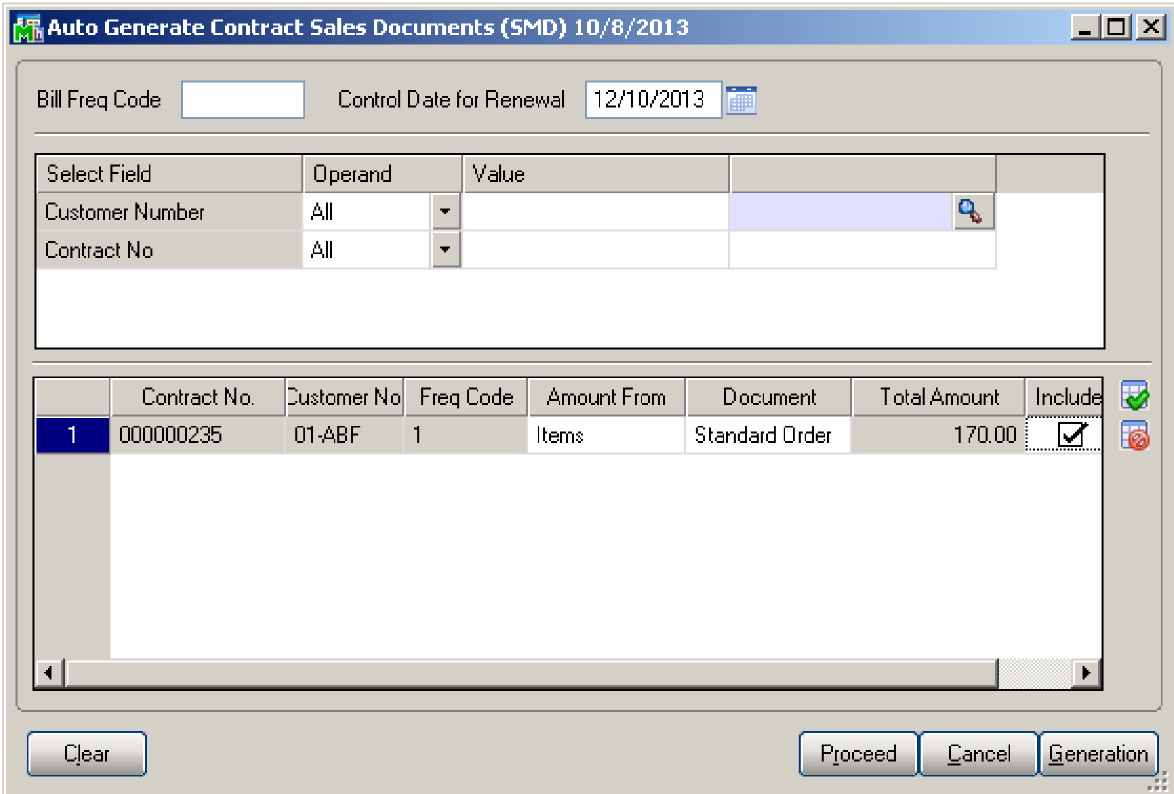
Contract Renewal

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



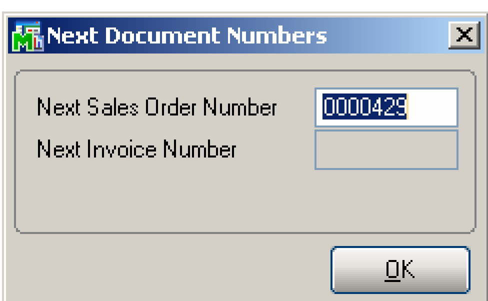
Renewal Bill Item- a Regular or Misc Item may be selected. This Item is used during renewal order generation. The line Item is set by default and may be replaced by any other Item.
Renew Duration –this field indicates the duration of Contract renewal, for how many days, months, year the Contract should be renewed. The duration should be specified as follows: 1Y, 3Y, 9M, 365D …
Renew Billing Amount- is the amount of a contract for a renewal 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 the **Contract Amount** option set to Items.

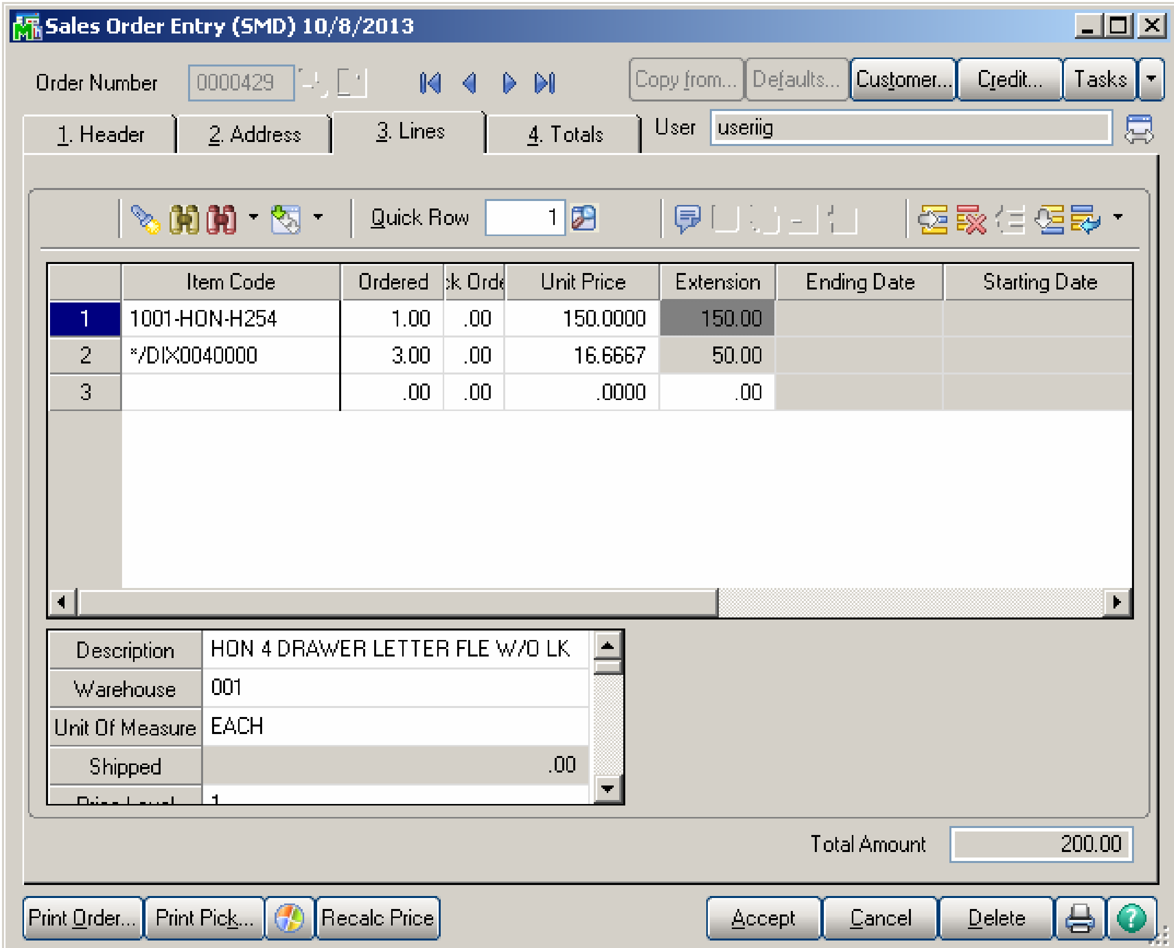


The **Control Date for Renewal** is intended for specifying the date for Contract renewal. This date should be greater than the Contract Item Ending Date in order to have the Contract Item selected for renewal.

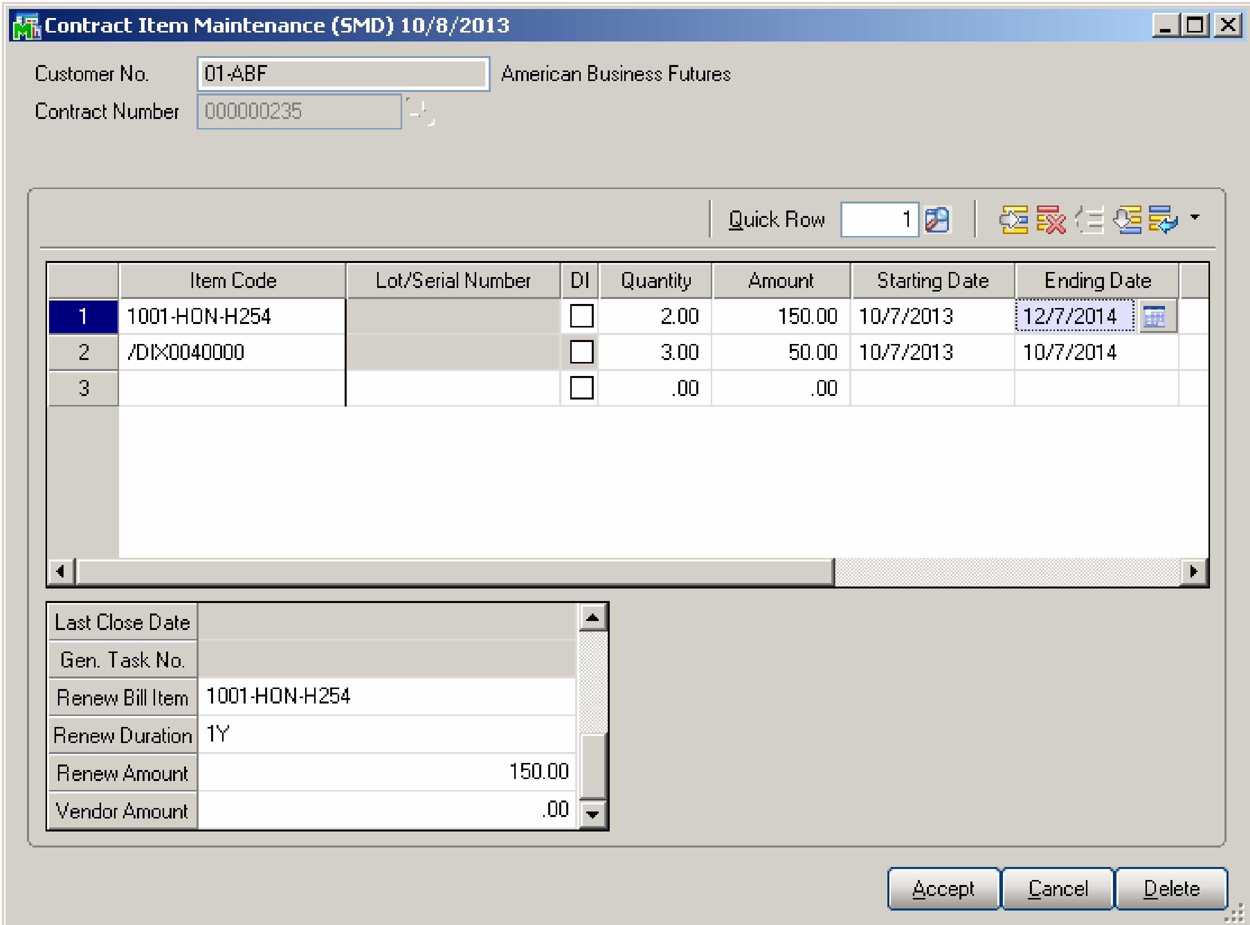
After making the necessary selections and pressing **Proceed** button the Contracts due to renewal are loaded in the grid. Select the **Include** checkbox and press the **Generation** button



Here is the Sales Order generated:



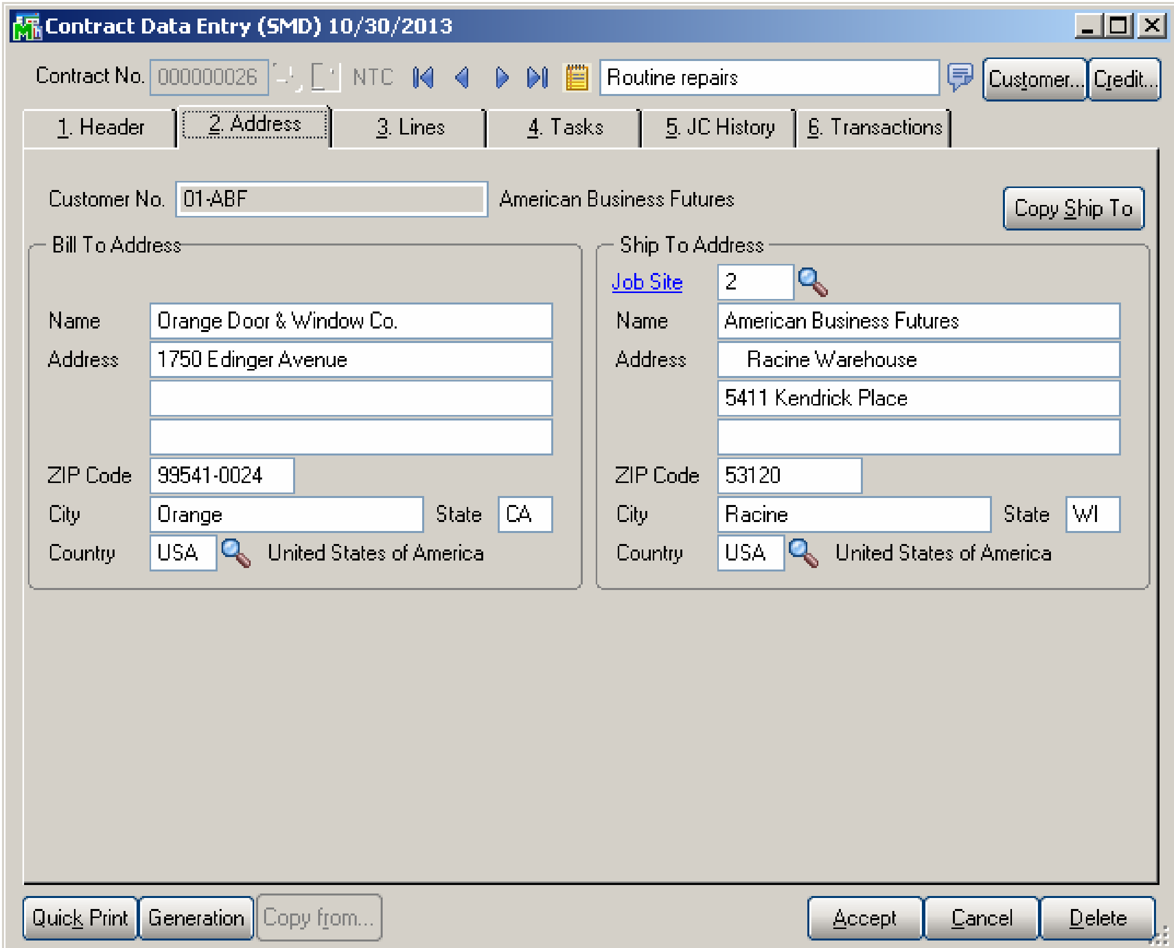
The Items having Renew Billing Amount entered in the Contract Items screen are loaded with the Unit Price equal to Renew Billing Amount.
After Invoicing the Sales Order and updating Sales Journal the Contract Items due to renewal are renewed with new Amount and the Ending Date:



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

Address Tab

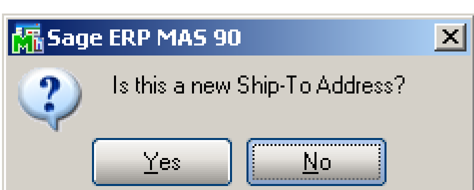
The second tab on the **Contract Entry** screen (**Address**) appears as follows.



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 **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:

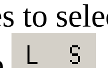


The **Customer Ship to Address Maintenance** screen will be displayed with the current information. Review and click **OK** to save the new Ship To Address.

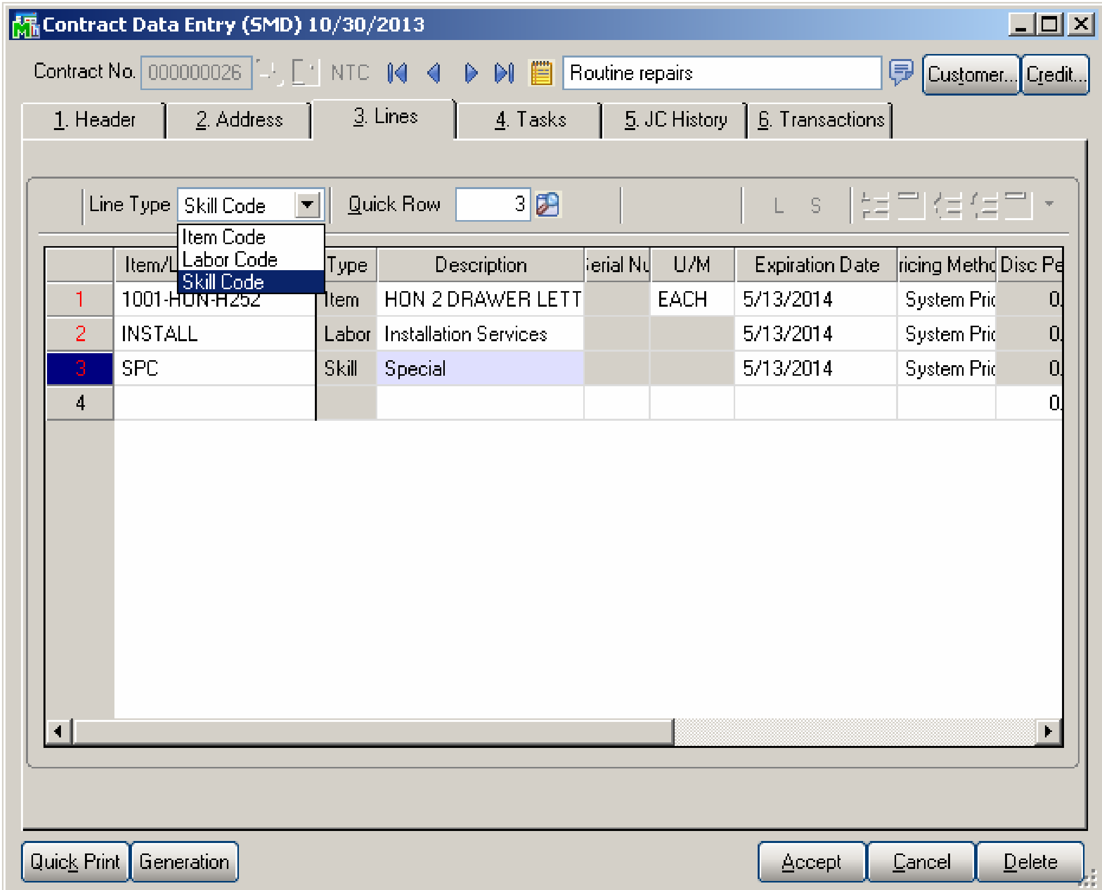
The **Copy Ship To** button allows for copying the **Ship To Address** information to the **Bill To Address** fields.

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 

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

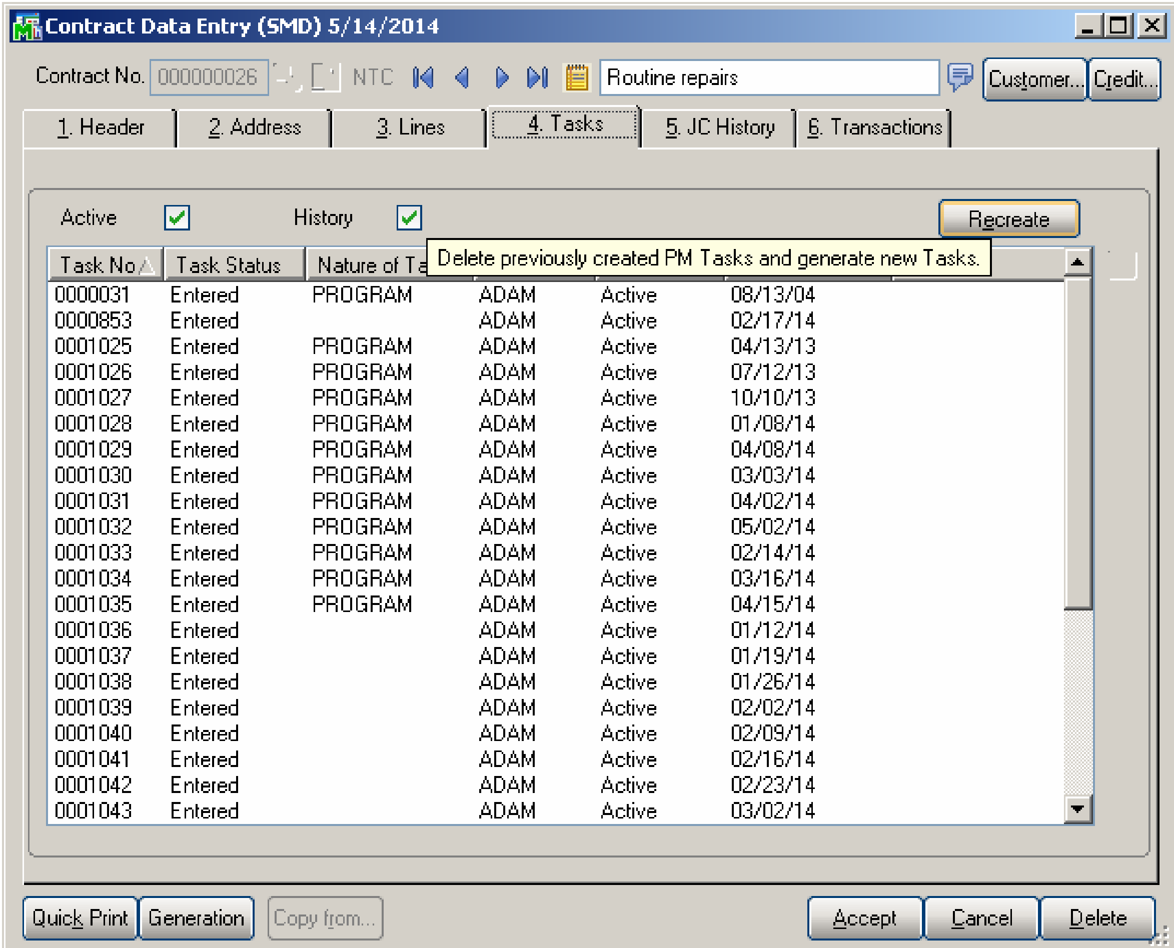


In either case, users have the option of specifying custom pricing information for a given item using the **Pricing Method** dropdown window as shown below.

- **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.

Tasks Tab

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



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

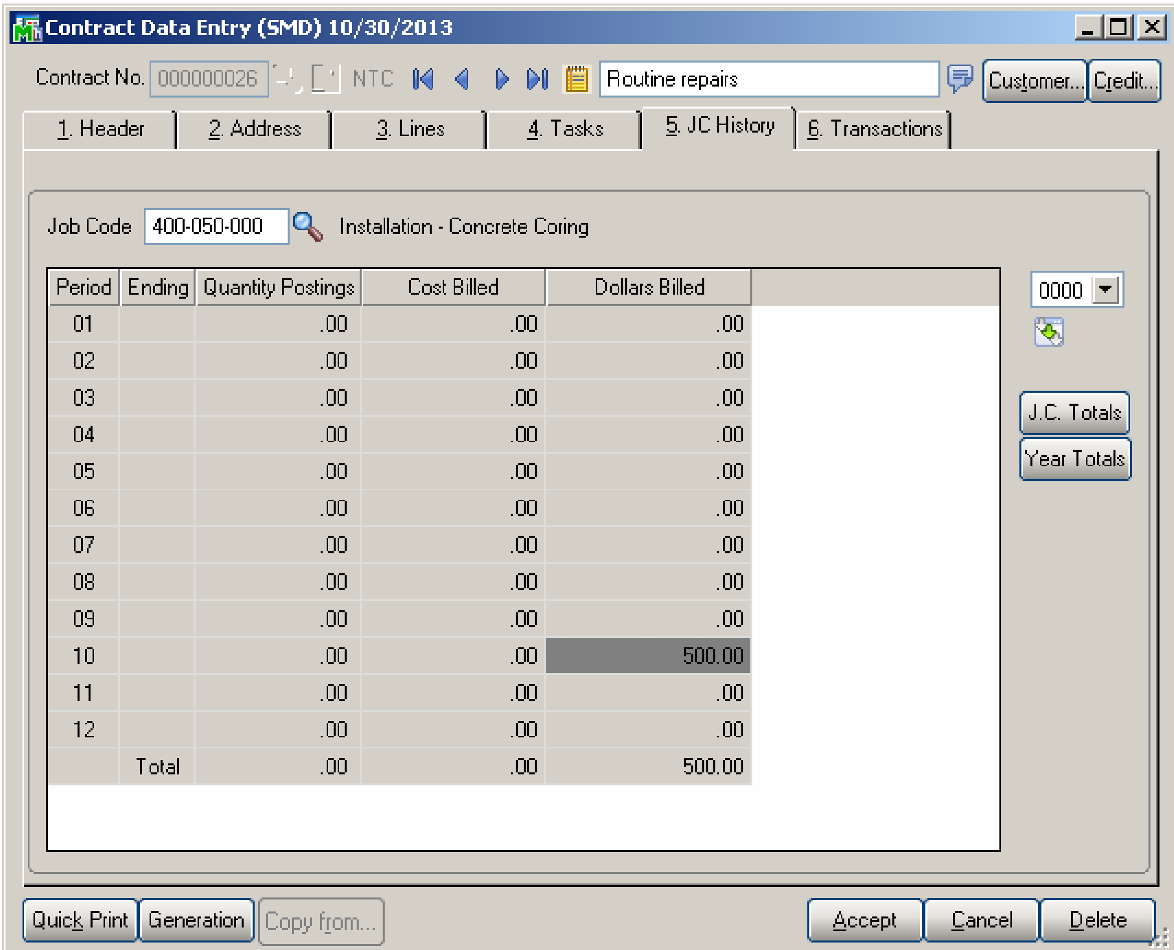
Check the **History** box to list the closed tasks saved in the History.
The **Scheduled Date** field displays the Task's Scheduled Date if no Dispatch is created for the Task. If the Task has dispatches the Scheduled Date shows the Starting Date of the last Dispatch.

The **Recreate** button allows for deleting previously created PM Tasks and generating new Tasks for current contract. Refer to Recreate Task title for details.

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

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.



This tab will Use the **Job Code** entry field to specify the Job Code entries you wish to view.

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

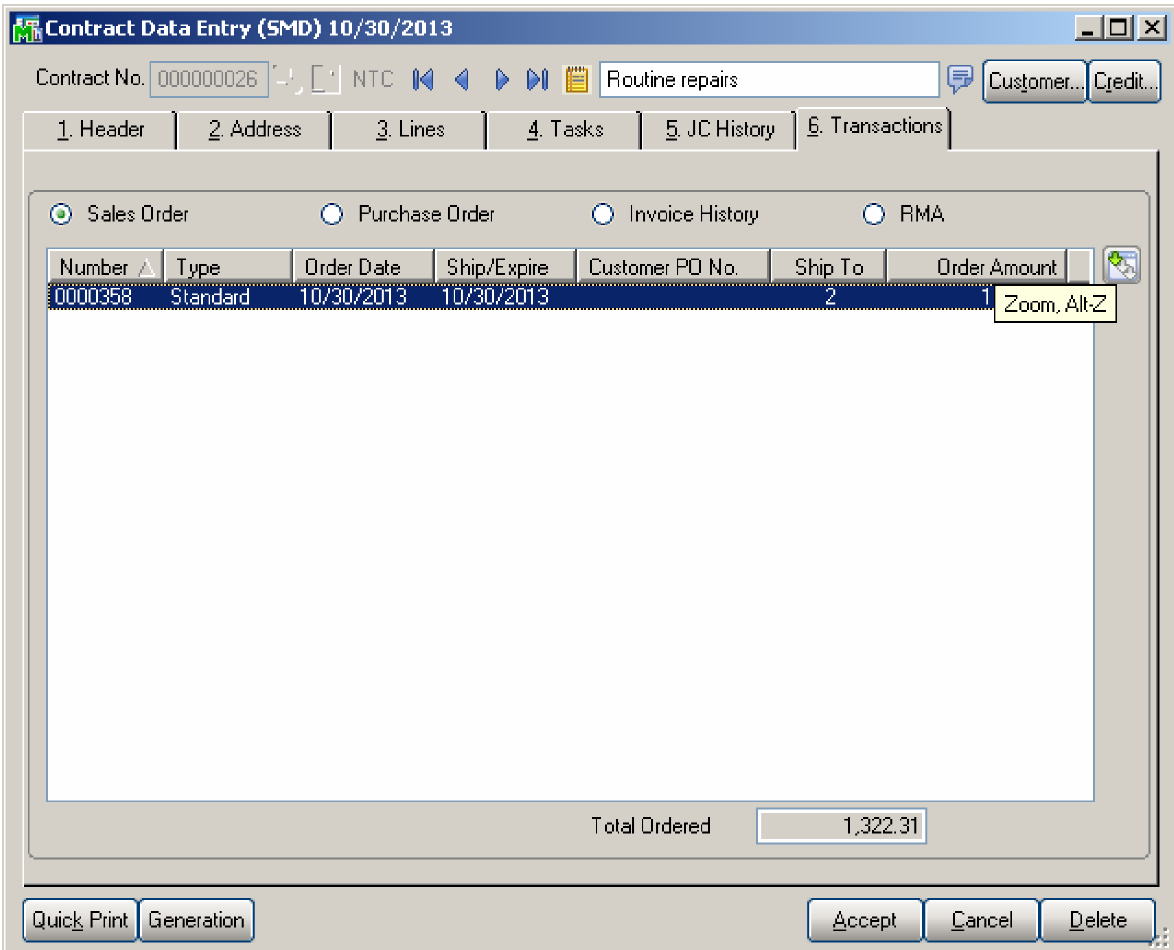
Use the **J.C. Totals** button to see total information for all Job Codes specific to the current contract.

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

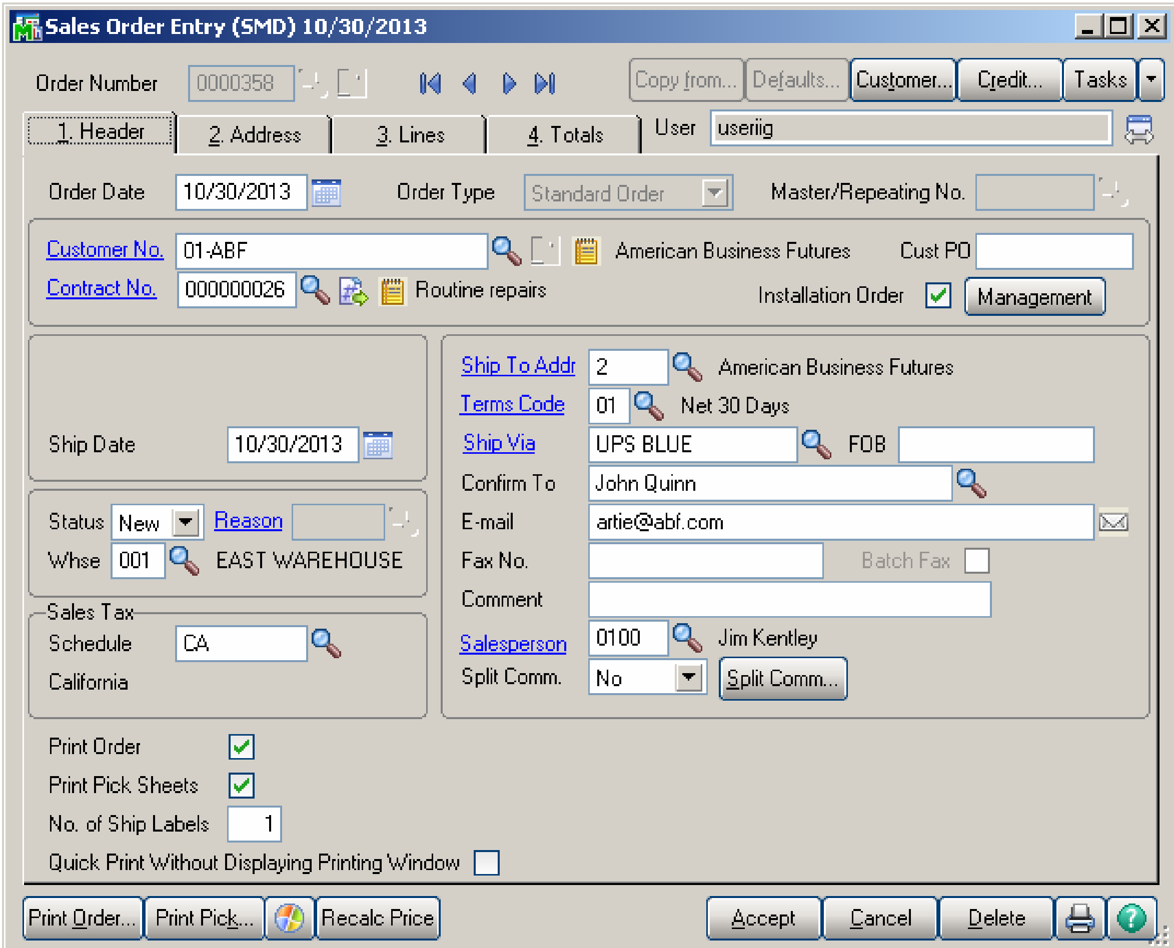
Transactions Tab

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

- Sales Order
- Purchase Order
- Invoice History
- RMA

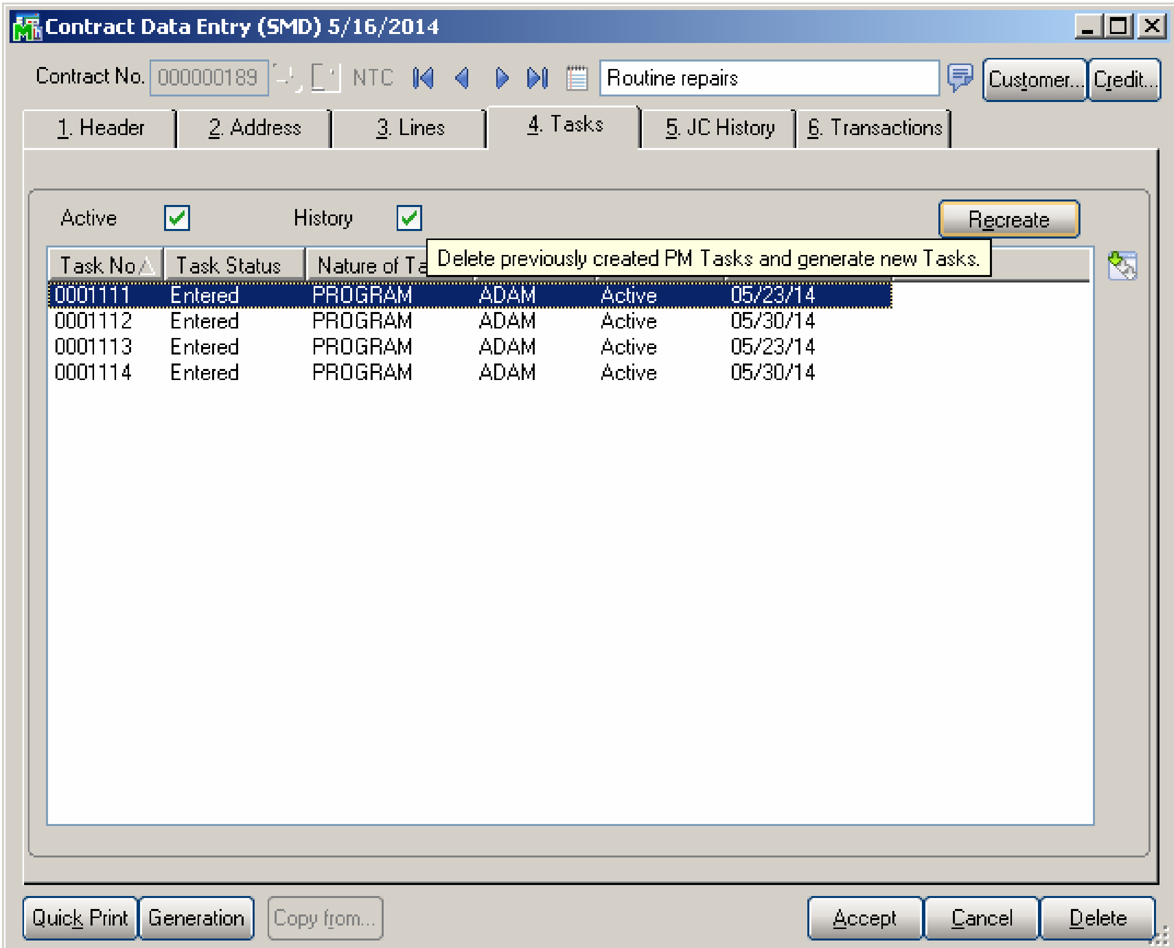


The Zoom button on the right hand of the list box enables drill down to the selected entry.

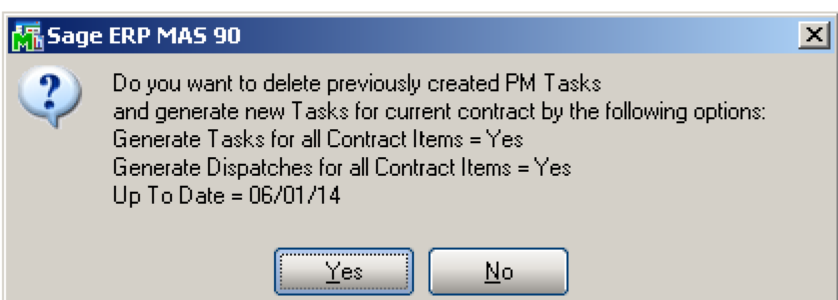


Recreate Tasks

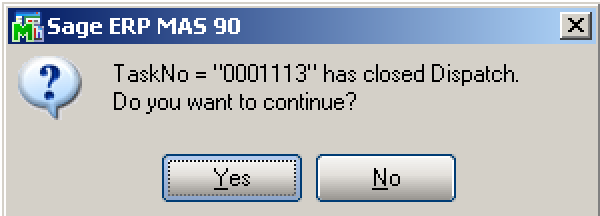
The **Recreate** button allows for deleting previously created PM Tasks and generating new ones if needed.



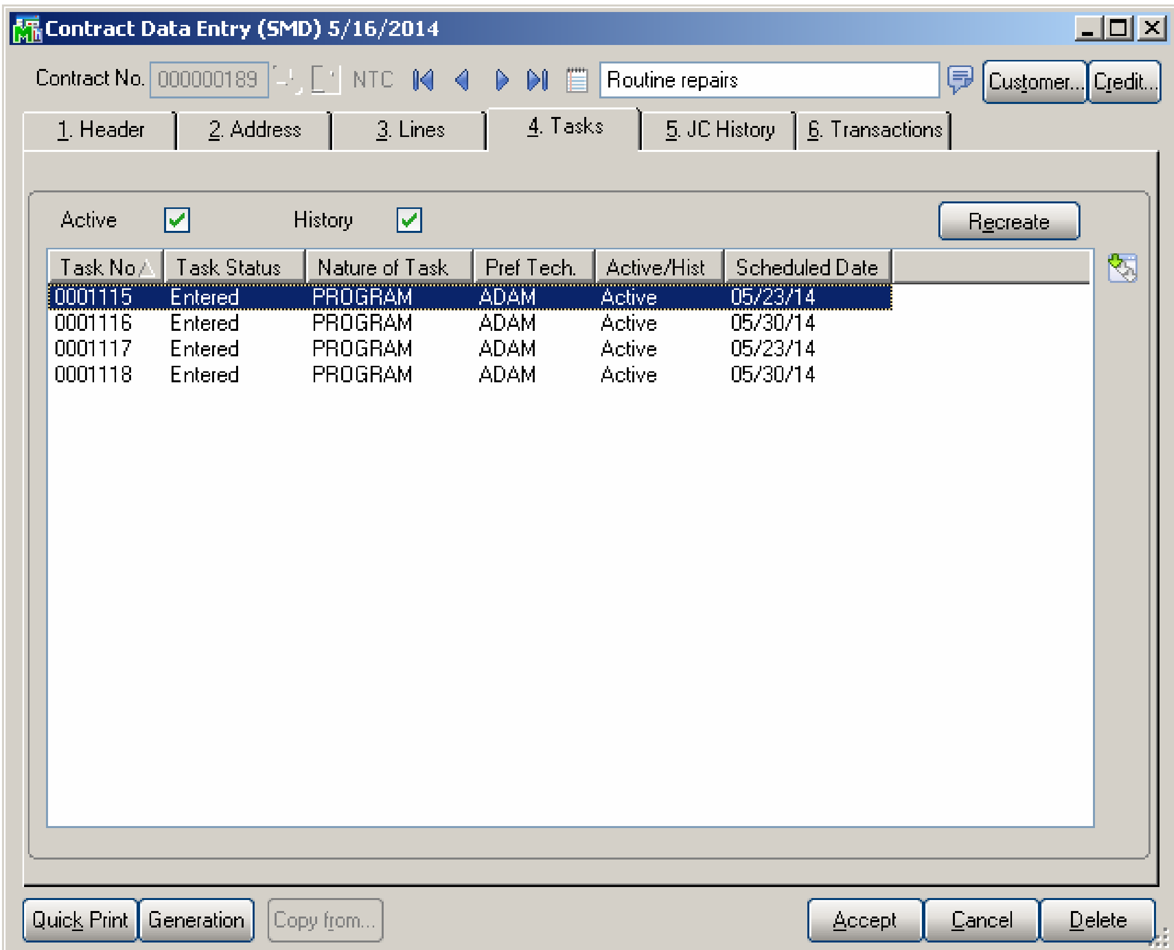
The following prompt appears upon pressing the Recreate button:



Selecting Yes will delete the generated Tasks and generate new ones based on the Up To Date shown in the message.
If there is Dispatch already closed for some Task the following message appears:



Selecting Yes will process Task generation, No will terminate the process.
Here are the Tasks recreated for current Contract:

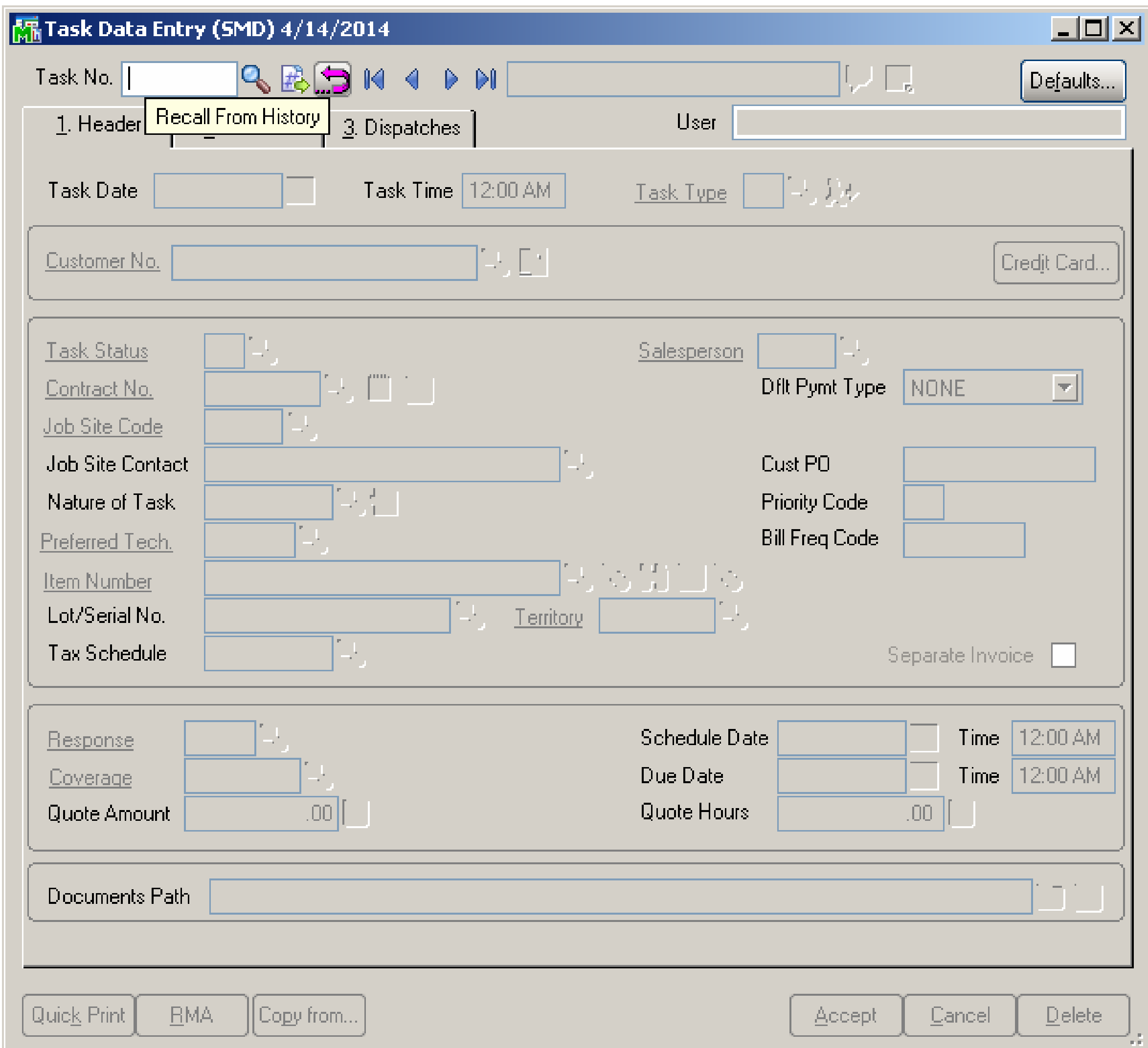


Task Data Entry

Header Tab

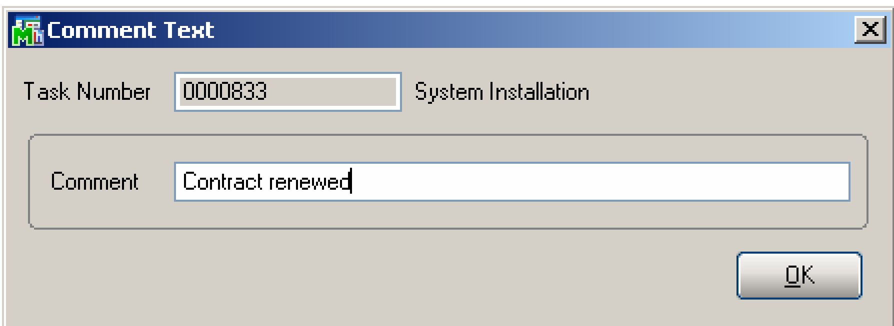
Task Data Entry is used for entry of tasks to be dispatched in response to calls received from customers. Tasks can be also generated automatically by the following processes in the Service Management System:

- Tasks detailing installation steps generated by the Sales Order Entry program.
- Tasks generated for special items by the Sales Order Entry program.
- Tasks generated for Preventive Maintenance by the Auto Generate Task Selection program.

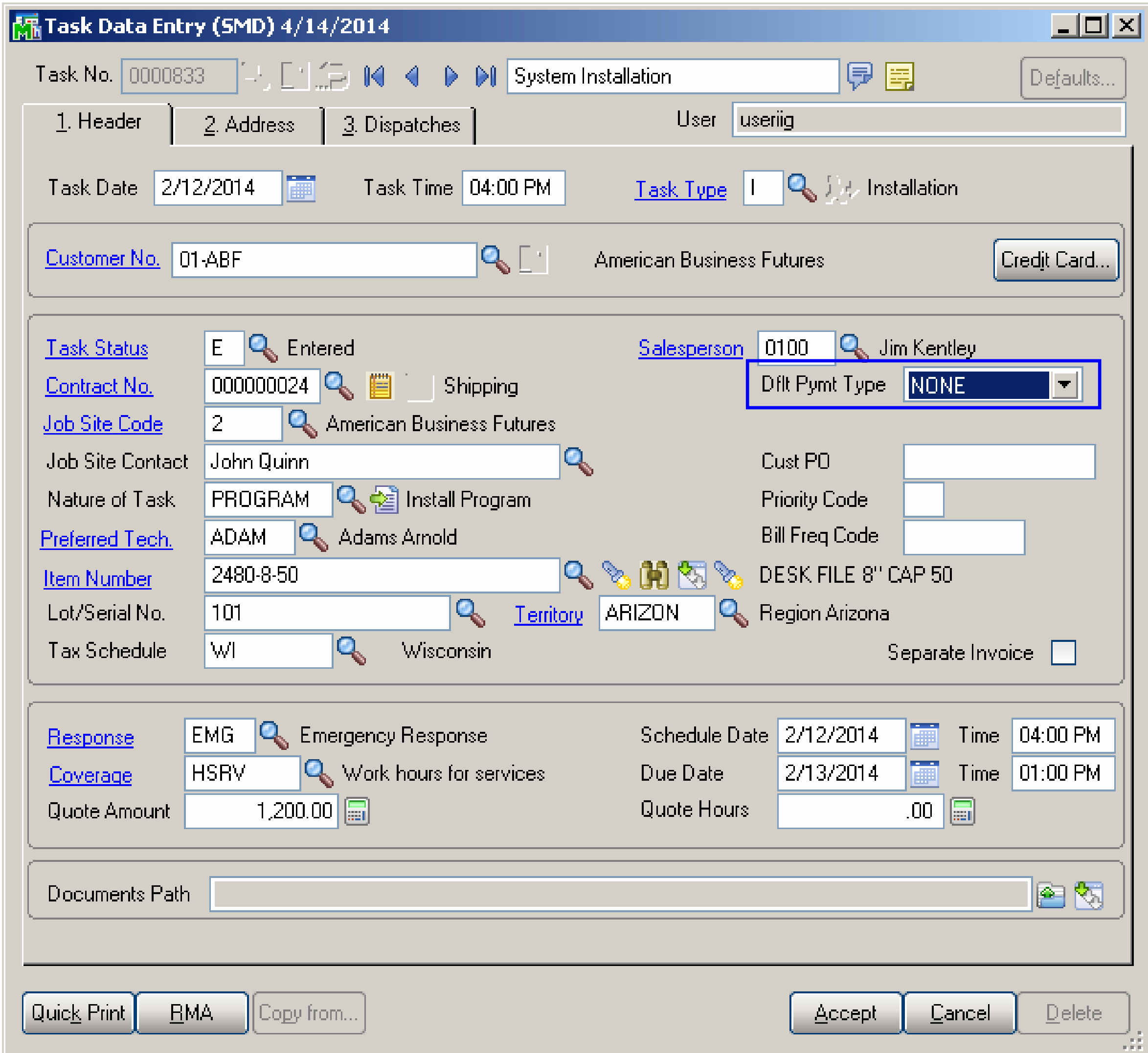


You may enter the **Task Number** you want to add or maintain manually by typing it into the **Task Number** field.
If you are adding new tasks, click the **Next Task No** icon to accept the next new Task Number, which the program will increment automatically.

Click the **Lookup** button to view all active tasks.
Click the **Recall From History** button to view History tasks.
Enter the **Description** of the task to be performed. The program allows for entry of extended description.
Click the **Extended Task Description** button to enter more detailed description.
Press the Comment button to open the Comment Text screen with Contract Comments loaded by default. The Comments can be edited for a Task.

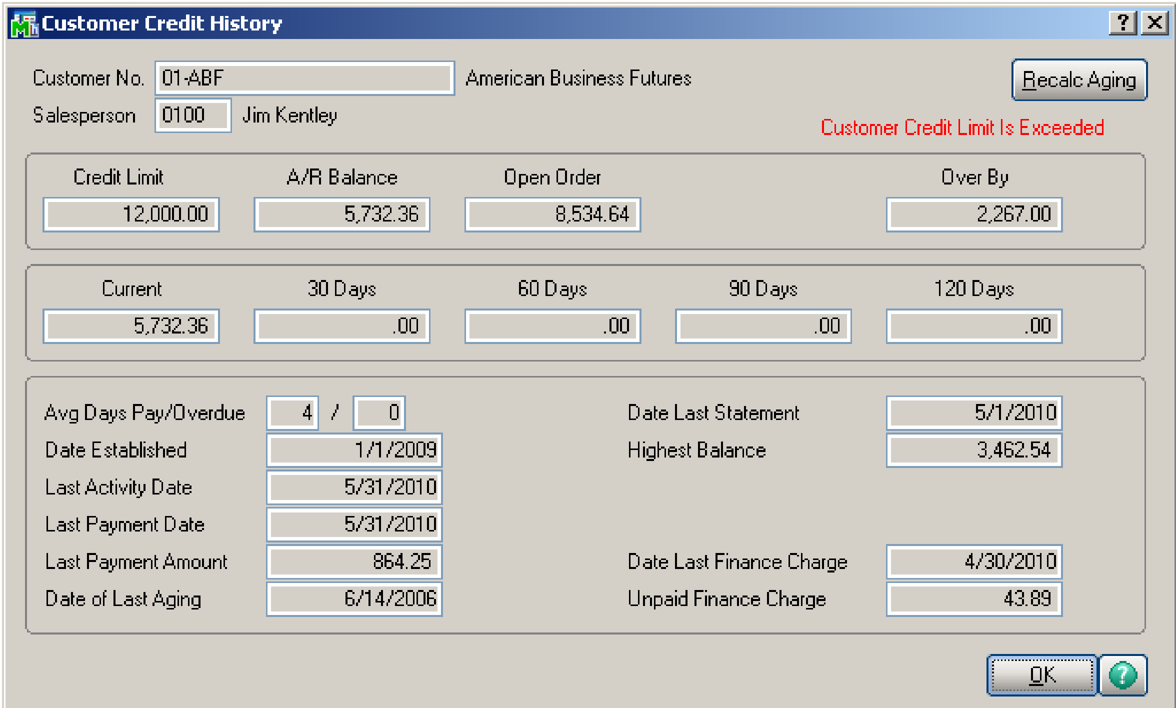


By default, the system sets the **Task Date** and **Time** to the current date and time. You can change it.

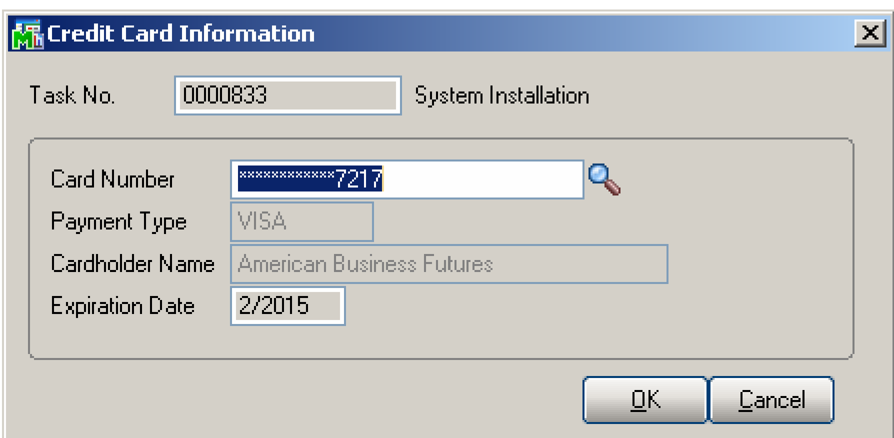


Enter/select the **Task Type** from the Task Type lookup list. Task Type indicates the type of the task to be performed. It is a required field for Task Entry.

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.



The **Credit Card** button allows for opening the Credit Card Information screen with the Credit Card information loaded from the Customer Credit Card Maintenance.
Upon selecting a Contract number the Credit Card Information is populated with respective information from Contract Entry.



When Sales Order/ SO Invoice is generated during Dispatch closing from Dispatch Data Entry, the Credit Card number and payment type are loaded from Task to respective Sales Order/ Invoice.

Dflt. Pymnt Type- Select the payment type to use as the default for sales orders and invoices generated for current Task. You can select None, Credit Card, Cash, Check or any non-credit card payment type entered in Payment Type Maintenance. Credit Card can be selected only if there is Credit Card entered.

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 will open the **Task/Dispatch Status Maintenance** and allow 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.

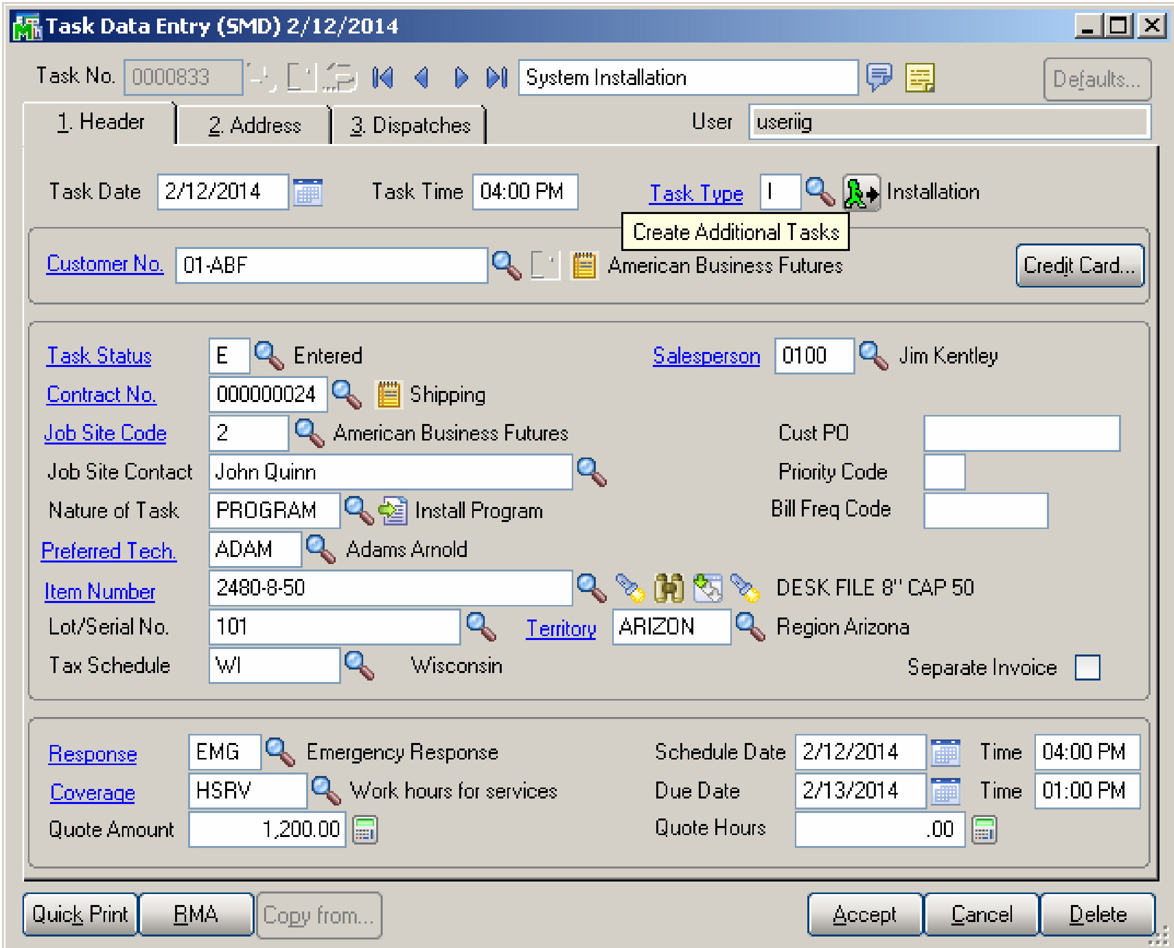
The **Contract Memo** button allows viewing/editing the Contract memos.

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.

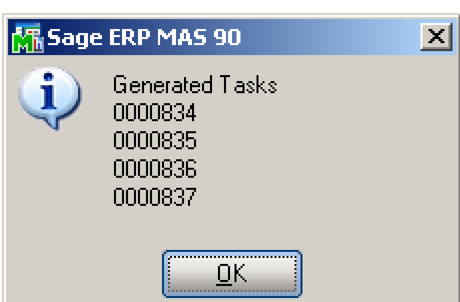
Enter the **Customer Purchase Order** number for this task.
Enter desired **Priority Code** for the task. **Priority Code** is used as a search term for the task.
Bill Freq Code denotes a scheme of Billing Frequency. The code is displayed, as it is set for a customer, and can be changed if needed.



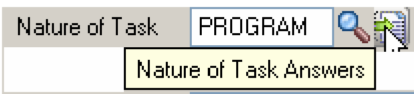
If the task is of a type, for which the **Create Additional Task** box is checked in the **Task Type Maintenance**, the Create Additional Tasks button become enabled allowing the user to automatically generate additional tasks.

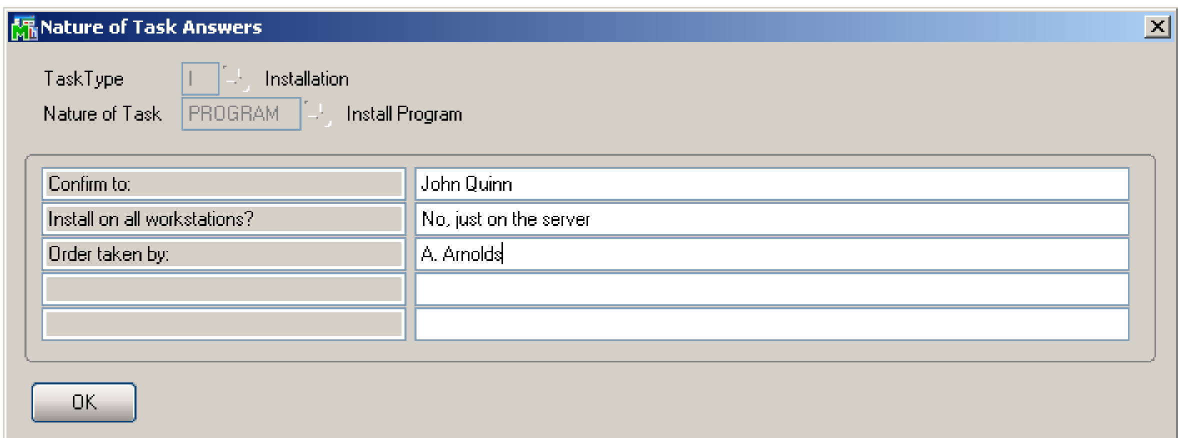
Additional tasks will have all the fields taken from the initial task, except for the Task Type and Description.

Press the **Create Additional Tasks** button.
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.





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

You may enter the Code Number 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 prompt to load the Preferred Technician to the new created Dispatch, while the task has no dispatch for the Preferred Technician.
The following prompt appears allowing the user to change the Technician on the Dispatches upon changing the **Preferred Technician** on the Task:

Upon pressing Yes the Technician Code is changed on all Dispatches of the Task.

Enter the **Item Number** reported by the customer identifying the product in need of service.

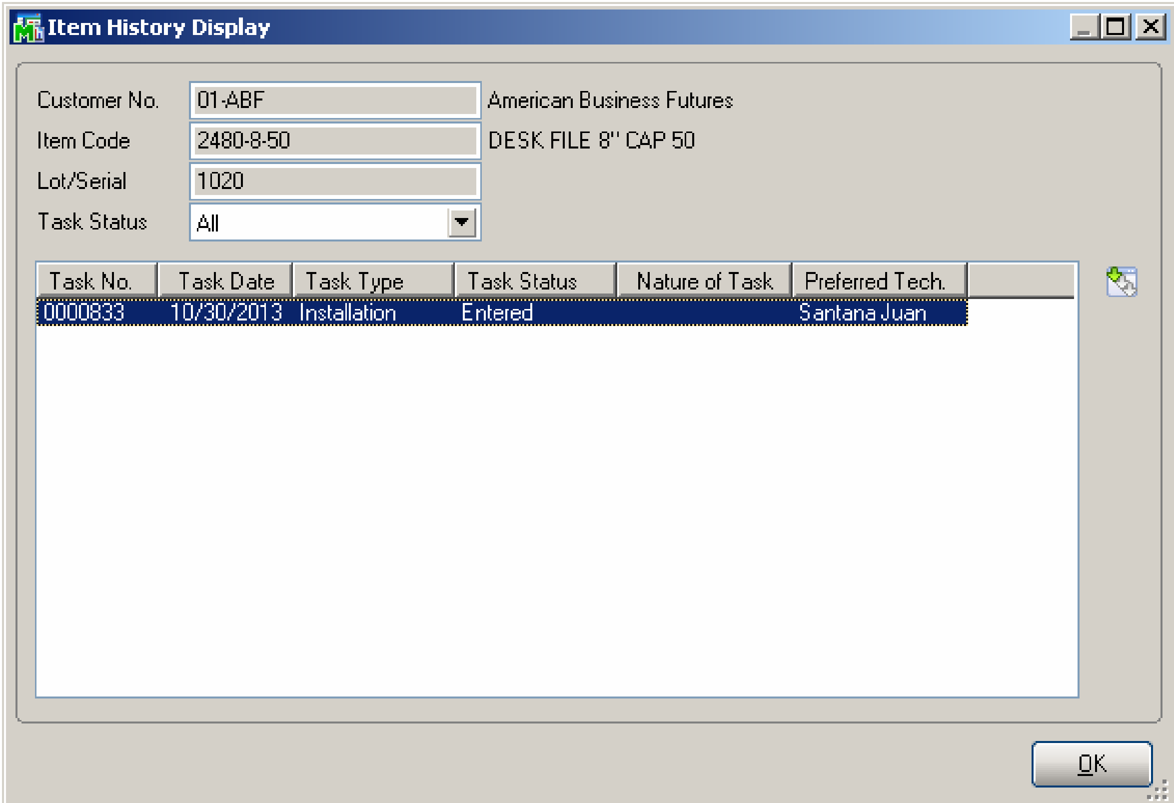
The program will load the **Response** and **Coverage Codes** from the Item, when it is entered/selected.

If the **Item Number** entered is not in the customer’s purchase history file, the program will display a prompt.

An item is considered to be on customer's history if it has been sold to him, no matter from SM or SO.
The system should be configured to retain purchase history, to be able to identify sold items.
First, the **Track Customer Site Inventory** option should be selected for the item on the **Main** 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.

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

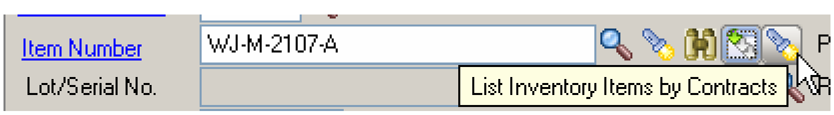
If the **Item Number** field on the **Task Data Entry** screen contains any number, the **Item History** button allows you to open the **Item History Display** screen displaying the tasks performed for current Item number as well as the specified Lot/Serial number



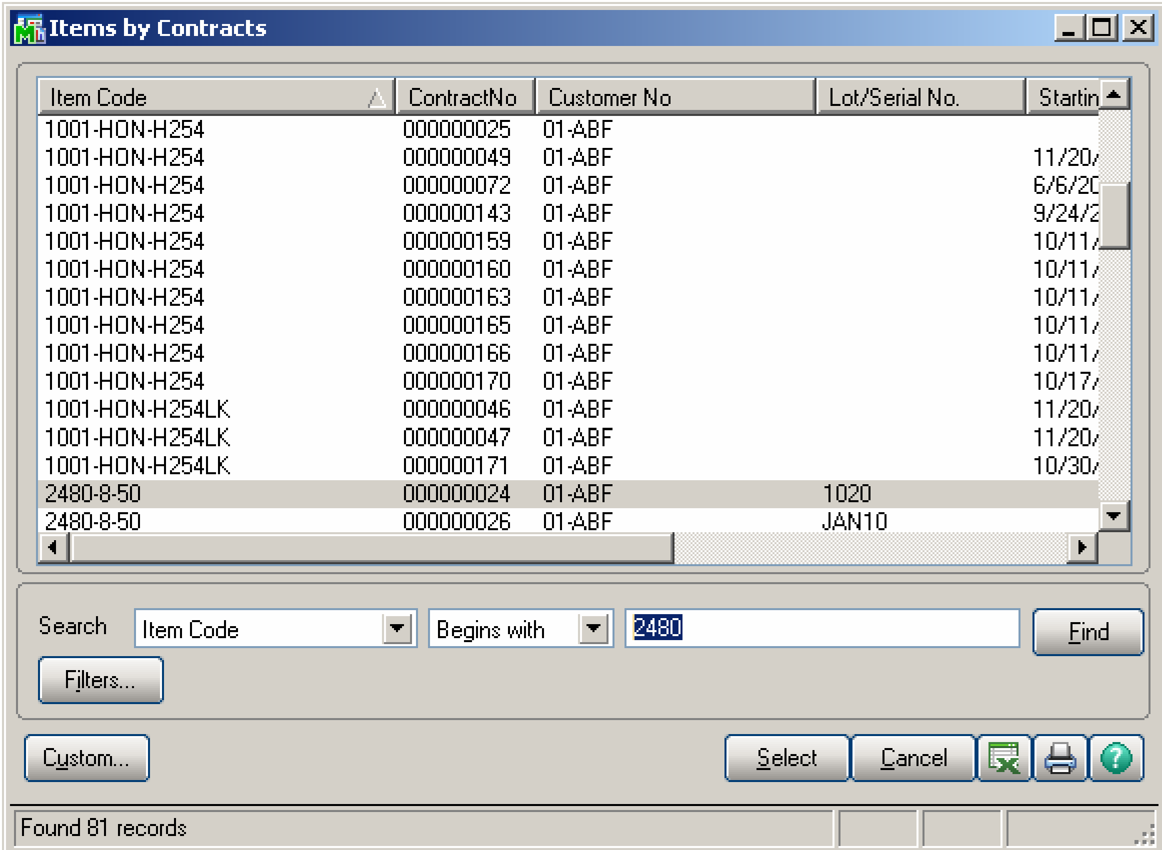
From the **Task Status** drop-down box, select if you want to view **All**, **Non Closed**, or **Closed** tasks.

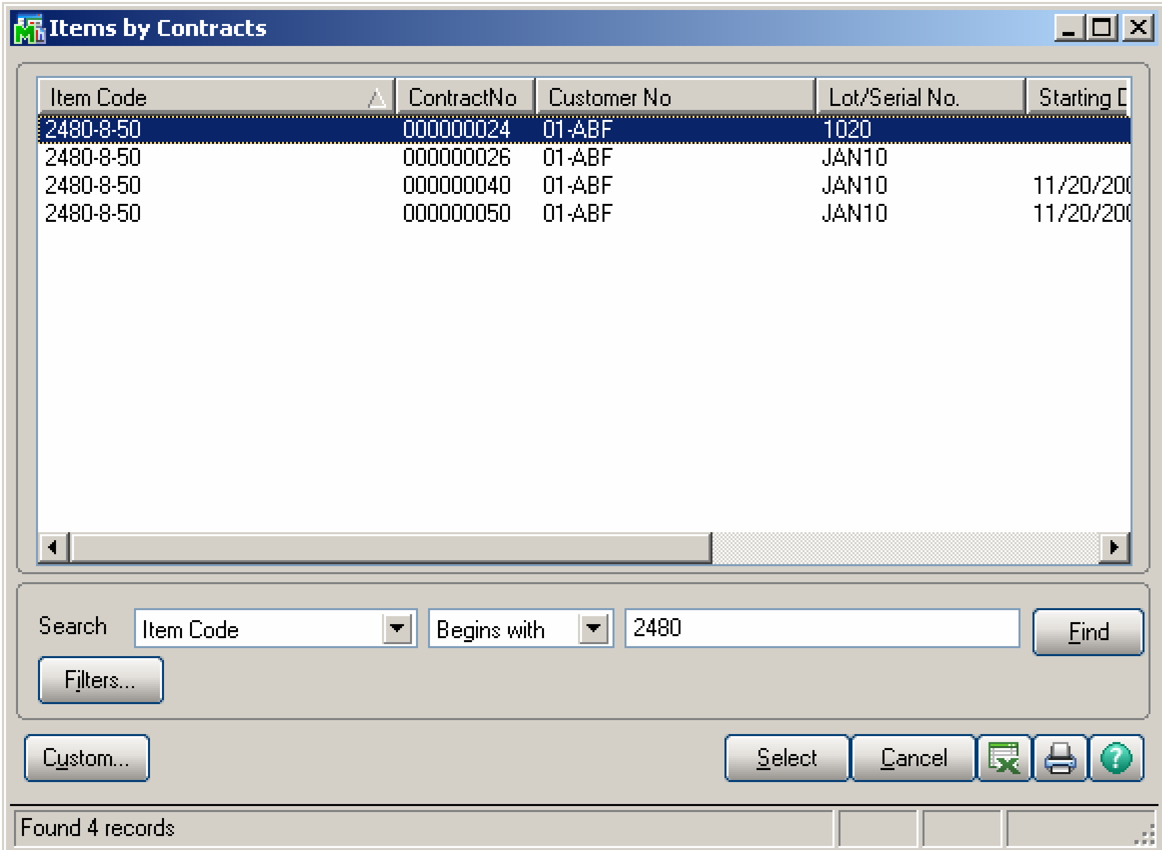
The **Task Zoom** button displays **Task Inquiry** for the selected Active tasks (Non Closed Statuses) and **Task History Inquiry** for the selected Closed tasks.

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



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

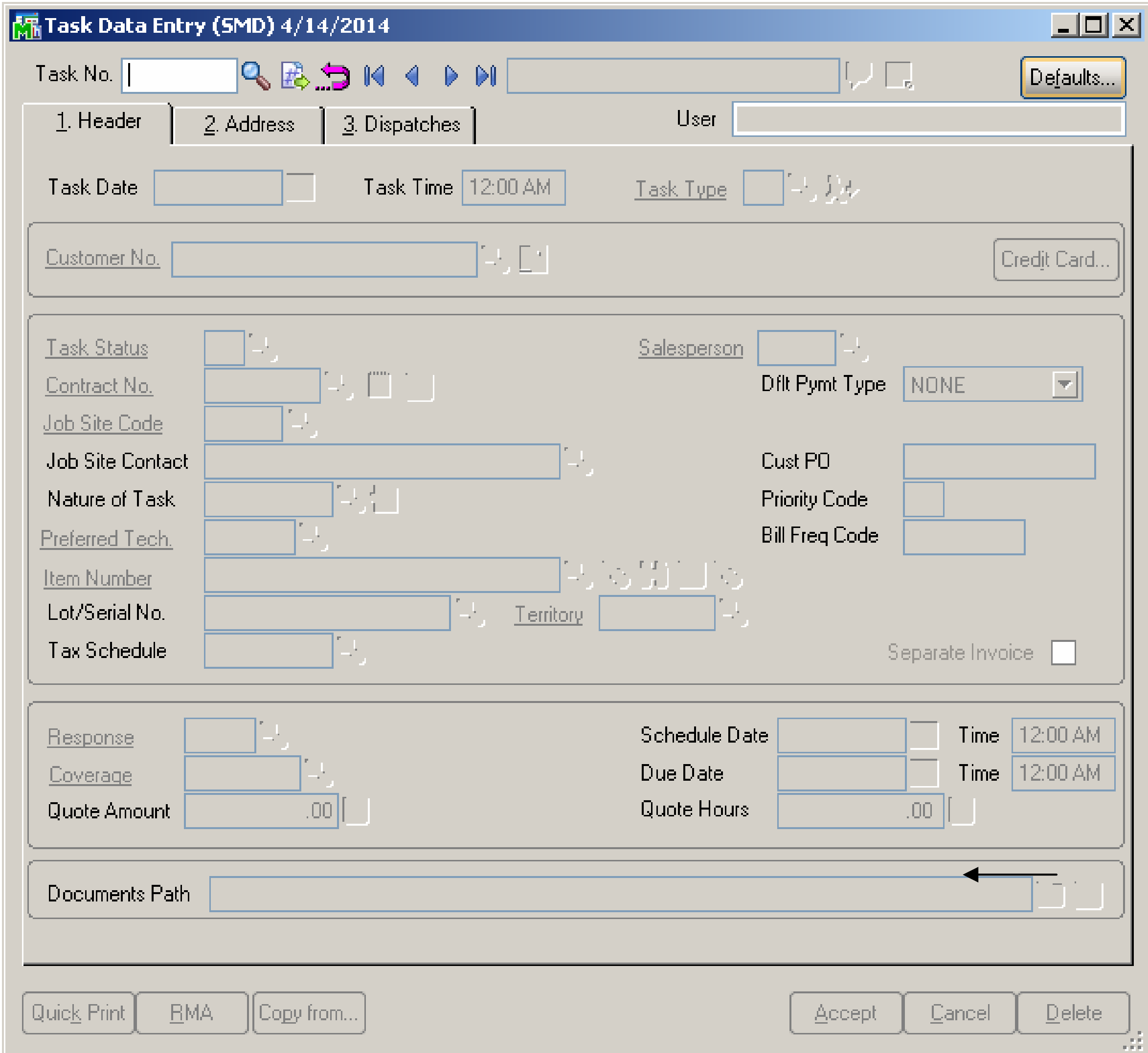

Items by Contracts
Item Code
ContractNo
Customer No
Lot/Serial No.
Startin
1001-HON-H254 000000025 01-ABF
1001-HON-H254 000000049 01-ABF 11/20/
1001-HON-H254 000000072 01-ABF 6/6/20
1001-HON-H254 000000143 01-ABF 9/24/2
1001-HON-H254 000000159 01-ABF 10/11/
1001-HON-H254 000000160 01-ABF 10/11/
1001-HON-H254 000000163 01-ABF 10/11/
1001-HON-H254 000000165 01-ABF 10/11/
1001-HON-H254 000000166 01-ABF 10/11/
1001-HON-H254 000000170 01-ABF 10/17/
1001-HON-H254LK 000000046 01-ABF 11/20/
1001-HON-H254LK 000000047 01-ABF 11/20/
1001-HON-H254LK 000000171 01-ABF 10/30/
2480-8-50 000000024 01-ABF 1020
2480-8-50 000000026 01-ABF JAN10
Search
Item Code
Begins with
2480
Find
Filters...
Custom...
Select
Cancel
Found 81 records

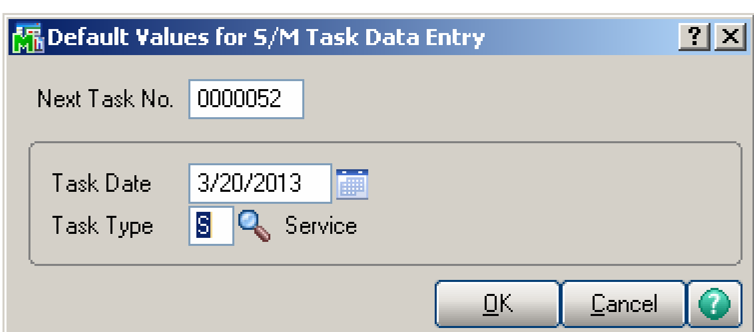


After selecting the customer, the **Territory** field is loaded automatically from the **Customer Maintenance** or **Customer Ship To Address Maintenance** screens. It can also be entered manually for the task.

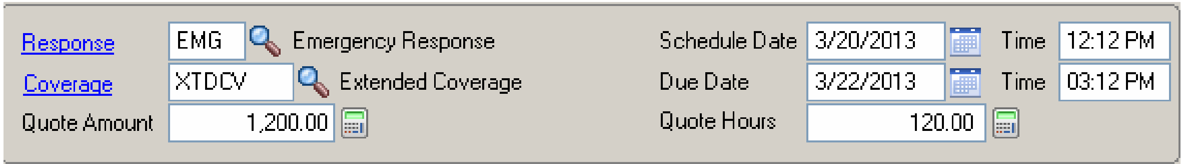
Check the **Separate Invoice** box, if you want separate invoices generated for each task during Auto Invoice Generation.

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.





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.



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

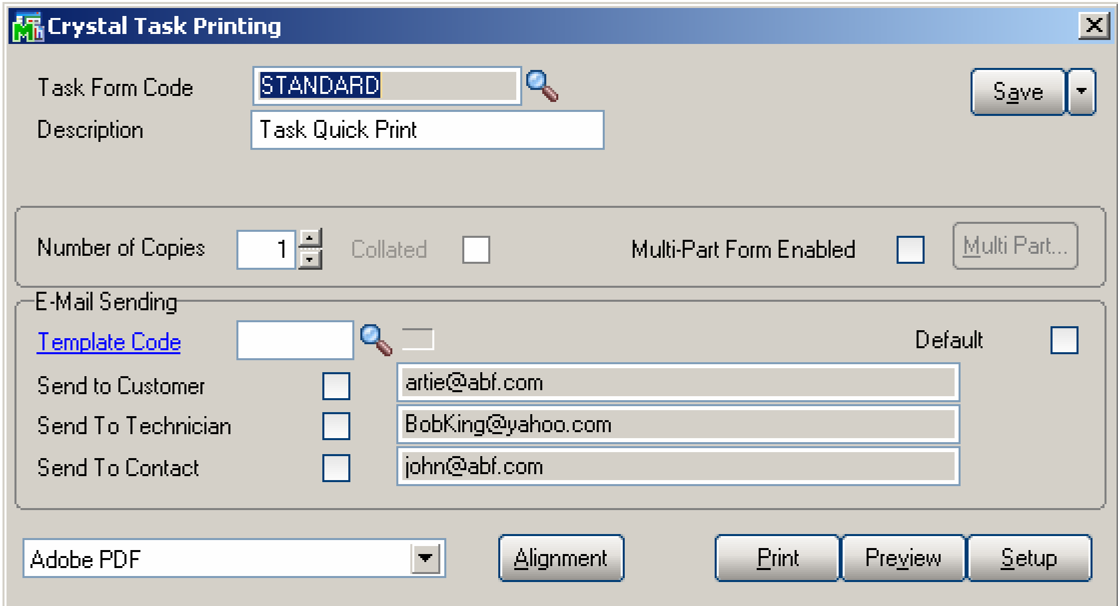
Enter the **Scheduled Date/Time** of the task to start. The SM module Date is set by default.

The **Due Date/Time** of the task will be calculated automatically based on the entered Scheduled Date/Time, Response and Coverage codes.

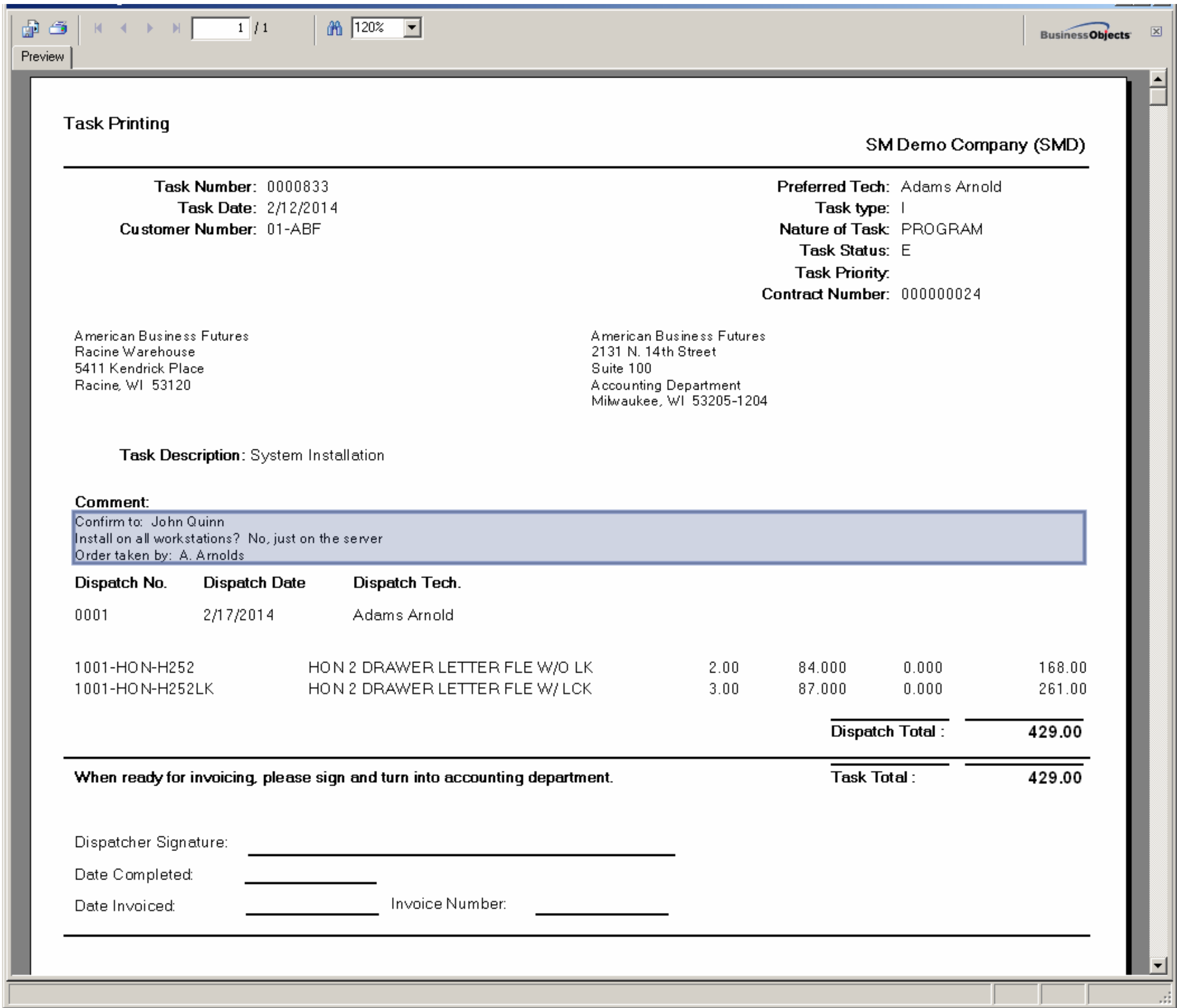
Upon changing the **Scheduled Date** or the **Due Date** on the Task a prompt appears allowing the user to change the dispatch Starting and Ending Date/Time based on the changes made on the task transaction.

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.**

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



Here is an example of printout:



Preview

Task Printing

SM Demo Company (SMD)

Task Number: 0000833
Task Date: 2/12/2014
Customer Number: 01-ABF

Preferred Tech: Adams Arnold
Task type: I
Nature of Task: PROGRAM
Task Status: E
Task Priority:
Contract Number: 000000024

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: System Installation

Comment:
Confirm to: John Quinn
Install on all workstations? No, just on the server
Order taken by: A. Arnolds

Dispatch No. Dispatch Date Dispatch Tech.
0001 2/17/2014 Adams Arnold

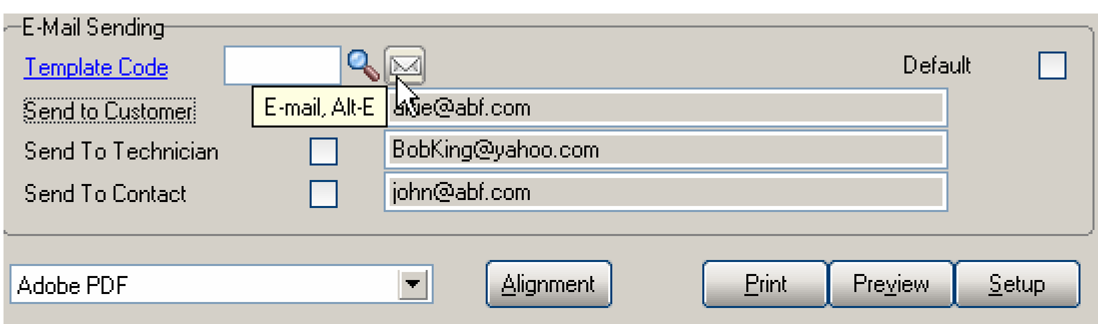
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	2.00	84.000	0.000	168.00
1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/ LCK	3.00	87.000	0.000	261.00

Dispatch Total : 429.00

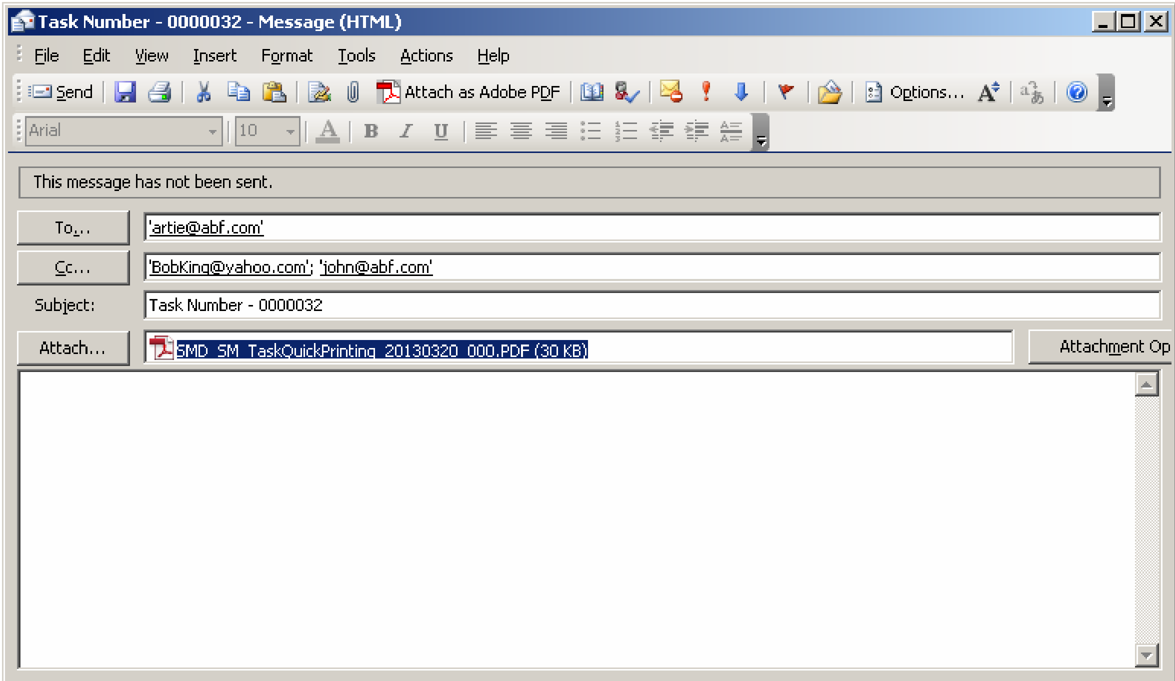
When ready for invoicing, please sign and turn into accounting department. Task Total : 429.00

Dispatcher Signature:
Date Completed:
Date Invoiced: Invoice Number:

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.

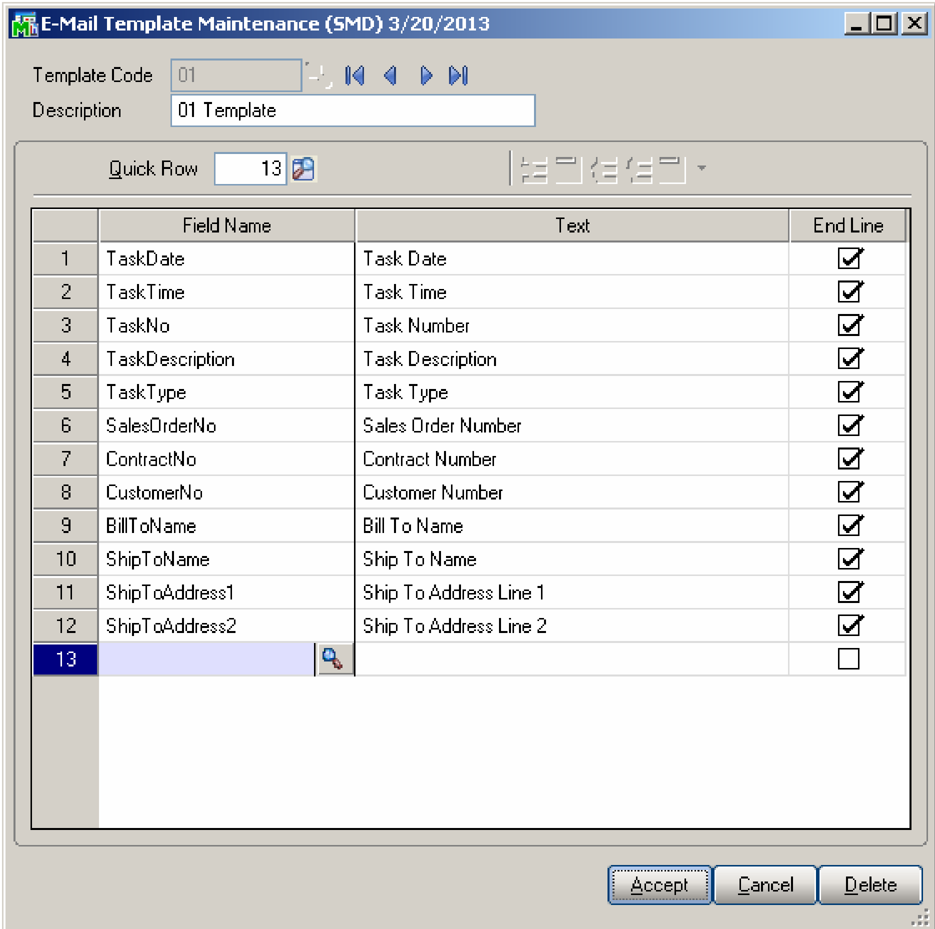


Note: It is necessary to have Paperless Office setup properly and working in order to have the Task printing PDF attached while sending emails.



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. You can leave the **E-Mail Template Code** blank, to send e-mail with blank body (no text, only attachment). 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.



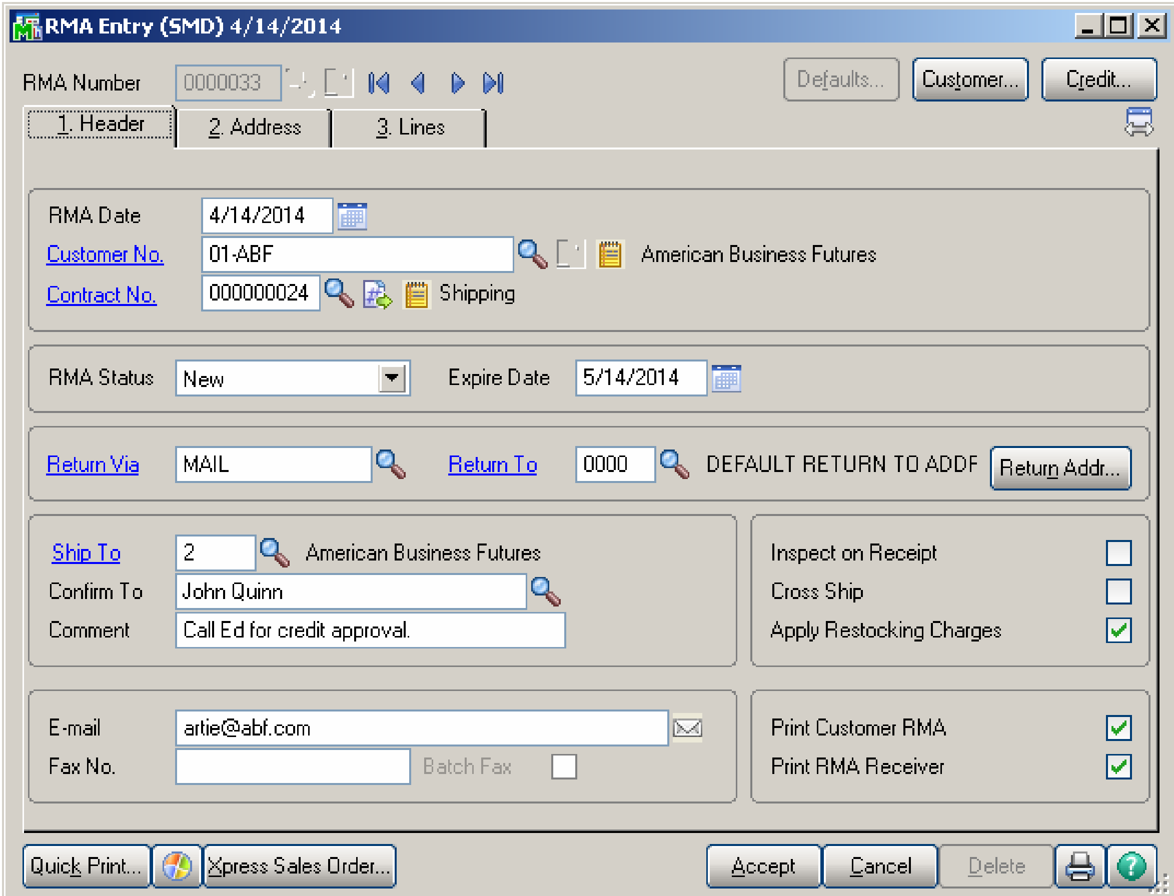
For the selected **Template Code**, select which fields value you want to add to the current line from the **Field** drop-down list. If you haven't entered Text for that field yet, clicking in the **Text** field will bring the name of the selected Field, which you can edit then.
You can add lines containing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

The **Customer No.** is loaded from the Task.

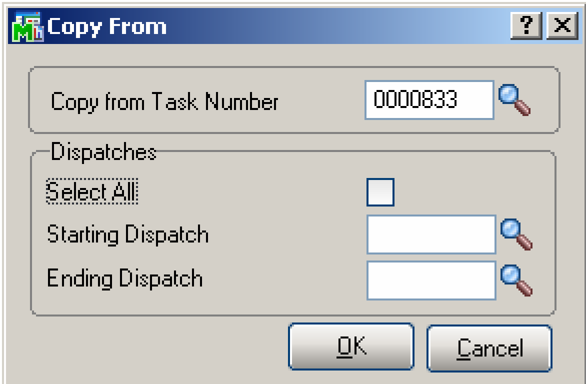


If the Task has an **Item** assigned, the item information is loaded into the **Lines** tab of the RMA Entry. When clicking the **Lines** tab, the item of the task is already selected. Select an invoice, make necessary changes to other fields, and accept the line.
After opening the **Return Merchandise Authorization Entry** screen, the **Task Data Entry** program runs independently. You can leave the **RMA Entry** program running and continue working with your tasks.

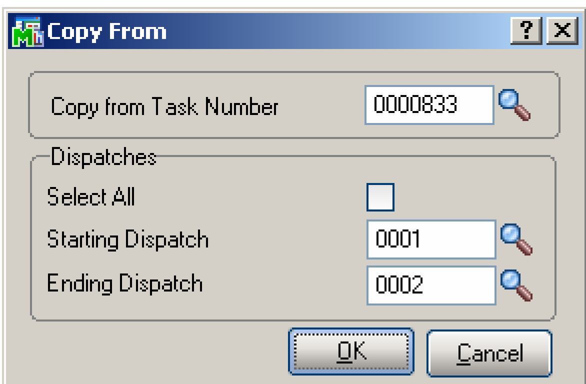
Use the **Copy from** button if you want to copy information from an already existing task into a new one.

After assigning the next new task number, pres the Copy From button and specify the source task in the following window. You may use the **Lookup** button to select the Task Number.

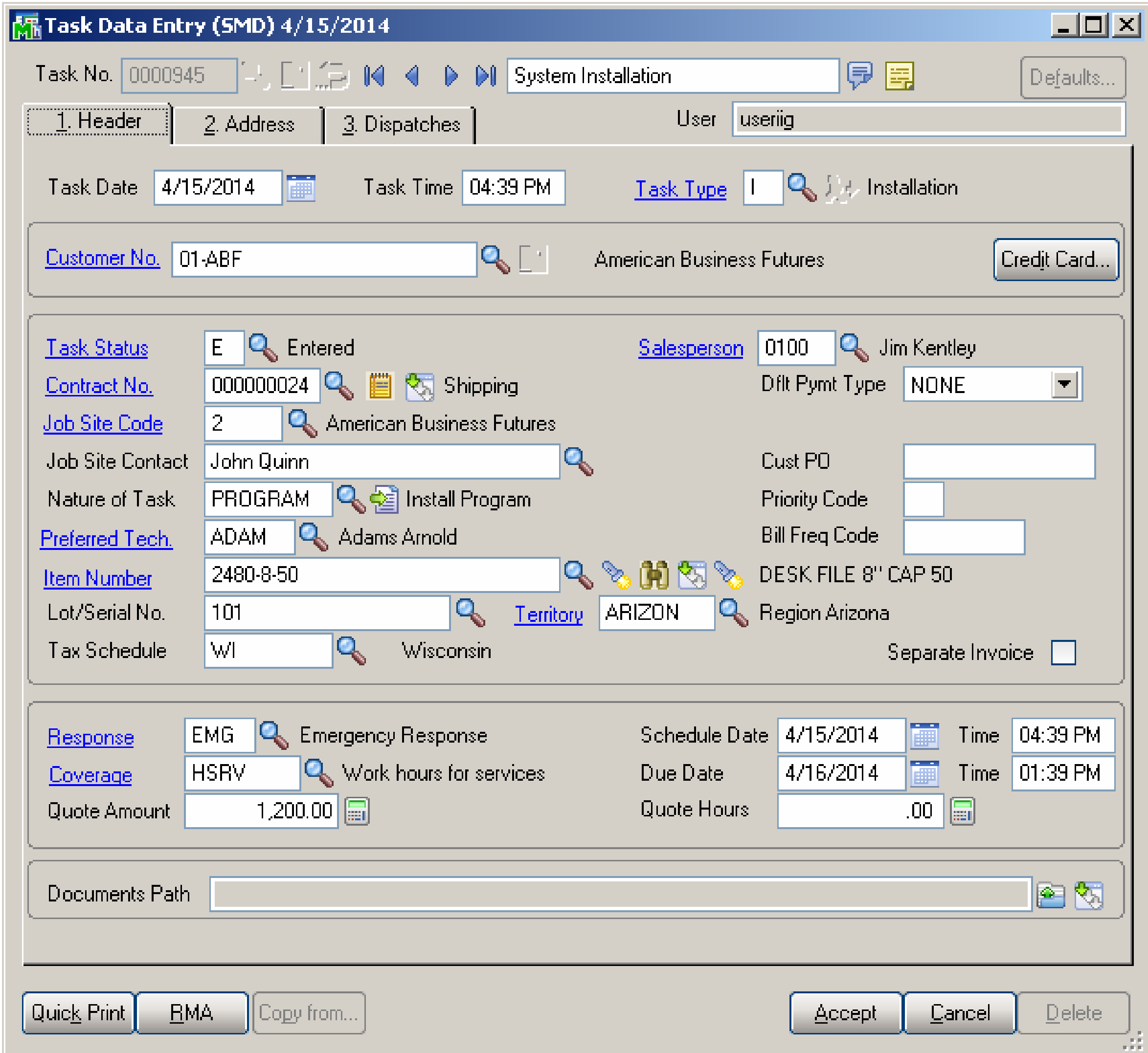
There is also an option for copying the Dispatches from the selected Task.



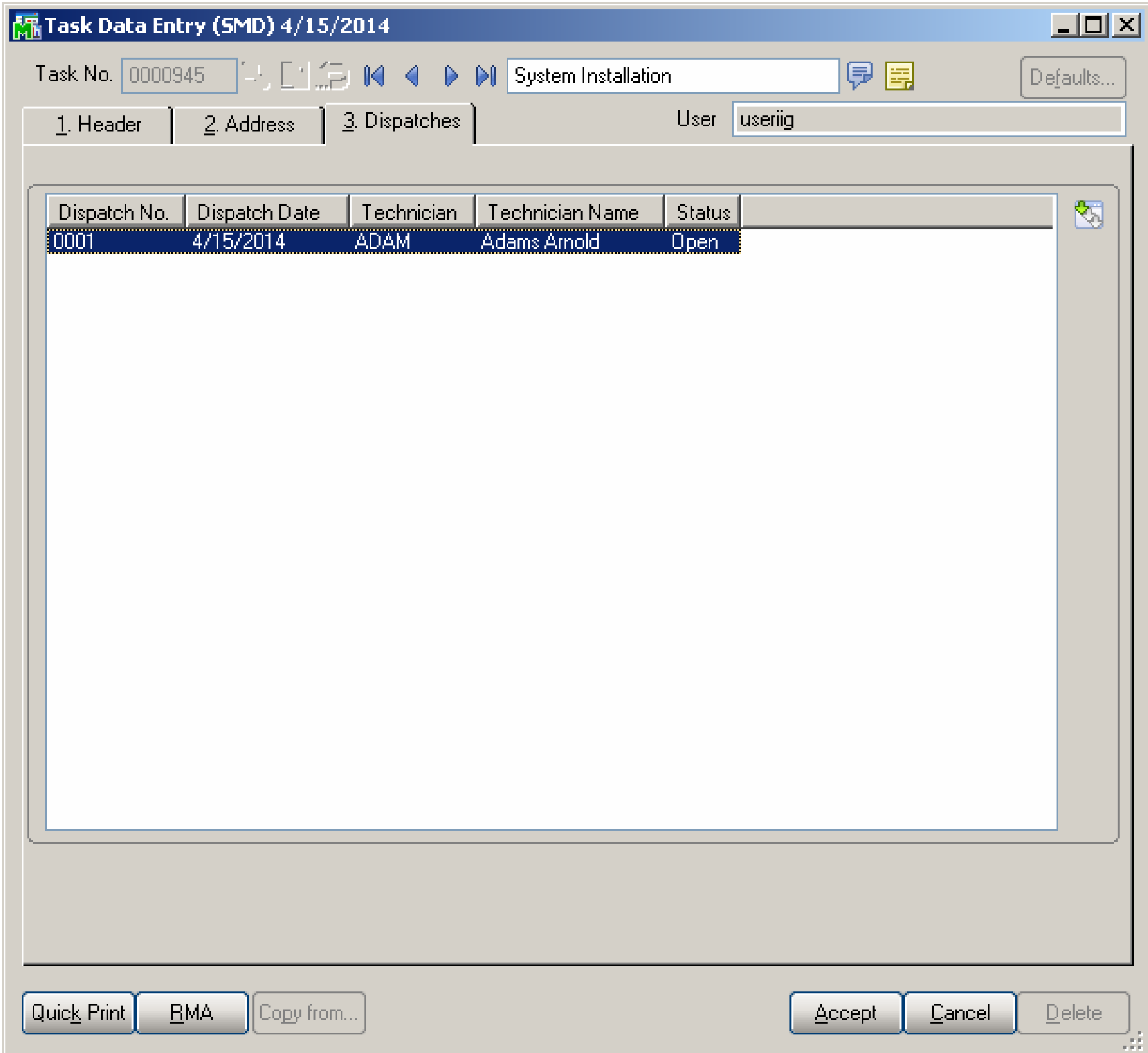
Check **Select All** to copy all Dispatches or select the range of Dispatches.
The Dispatches of the specified Task will be copied with the Dispatch status set to the Default status set in the Service Management Options and the Starting and Ending Date/Time set to current Date/Time.



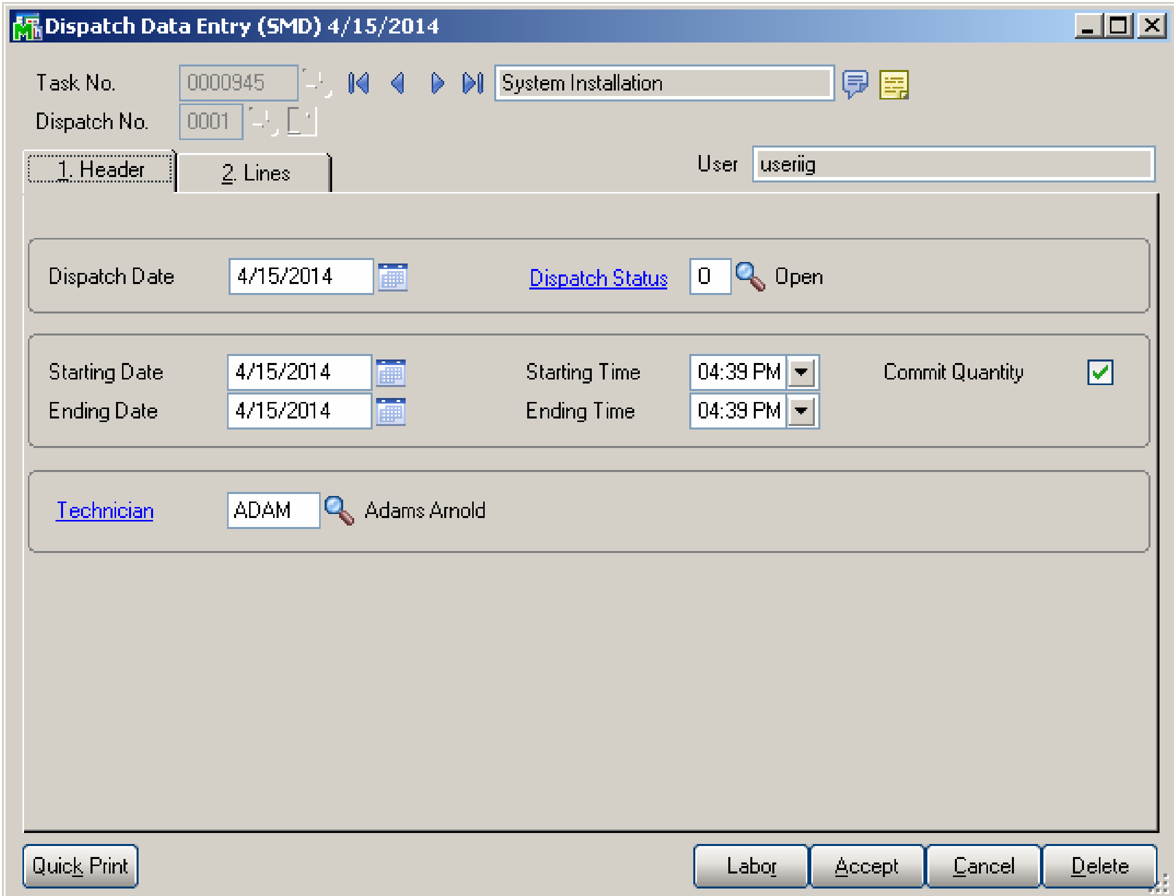
Press Ok to copy the selected Dispatches to the newly created Task.



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.

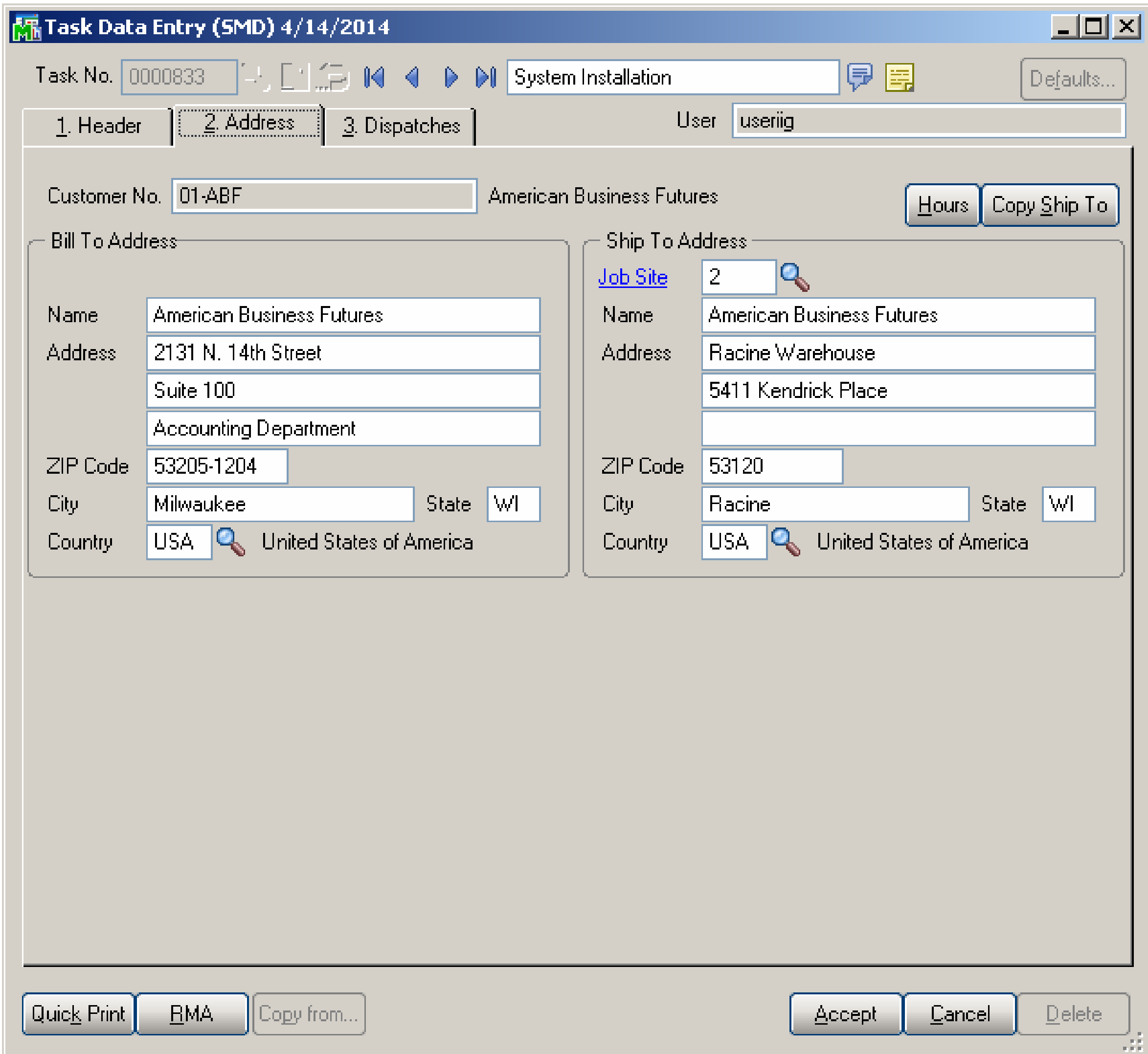


The Starting and Ending Dates of the Dispatches created by copying are set to current Date/Time (S/M Module Date).

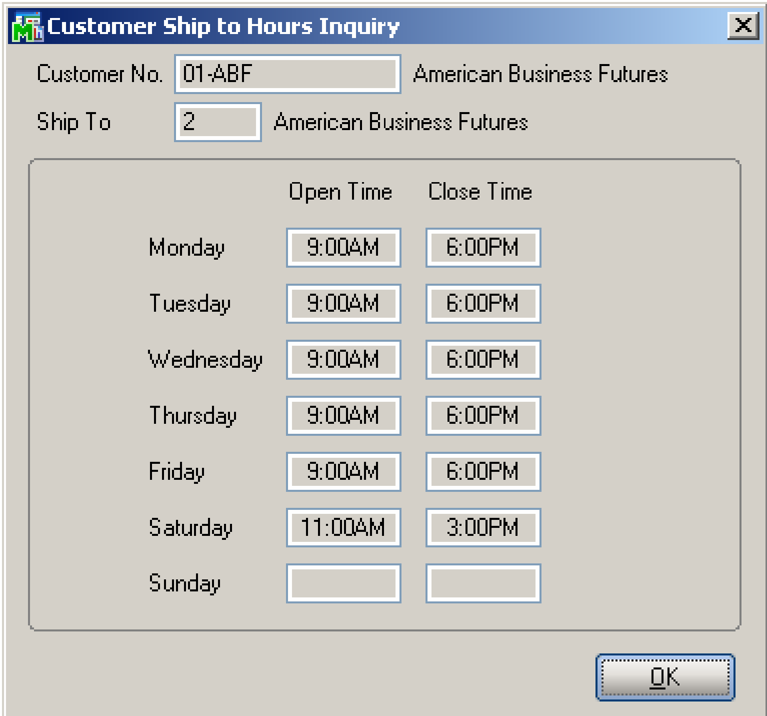

Dispatch Data Entry (SMD) 4/15/2014
Task No.
0000945
System Installation
Dispatch No.
0001
1. Header
2. Lines
User
useriig
Dispatch Date
4/15/2014
Dispatch Status
0
Open
Starting Date
4/15/2014
Ending Date
4/15/2014
Starting Time
04:39 PM
Ending Time
04:39 PM
Commit Quantity
Technician
ADAM
Adams Arnold
Quick Print
Labor
Accept
Cancel
Delete

Address Tab

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



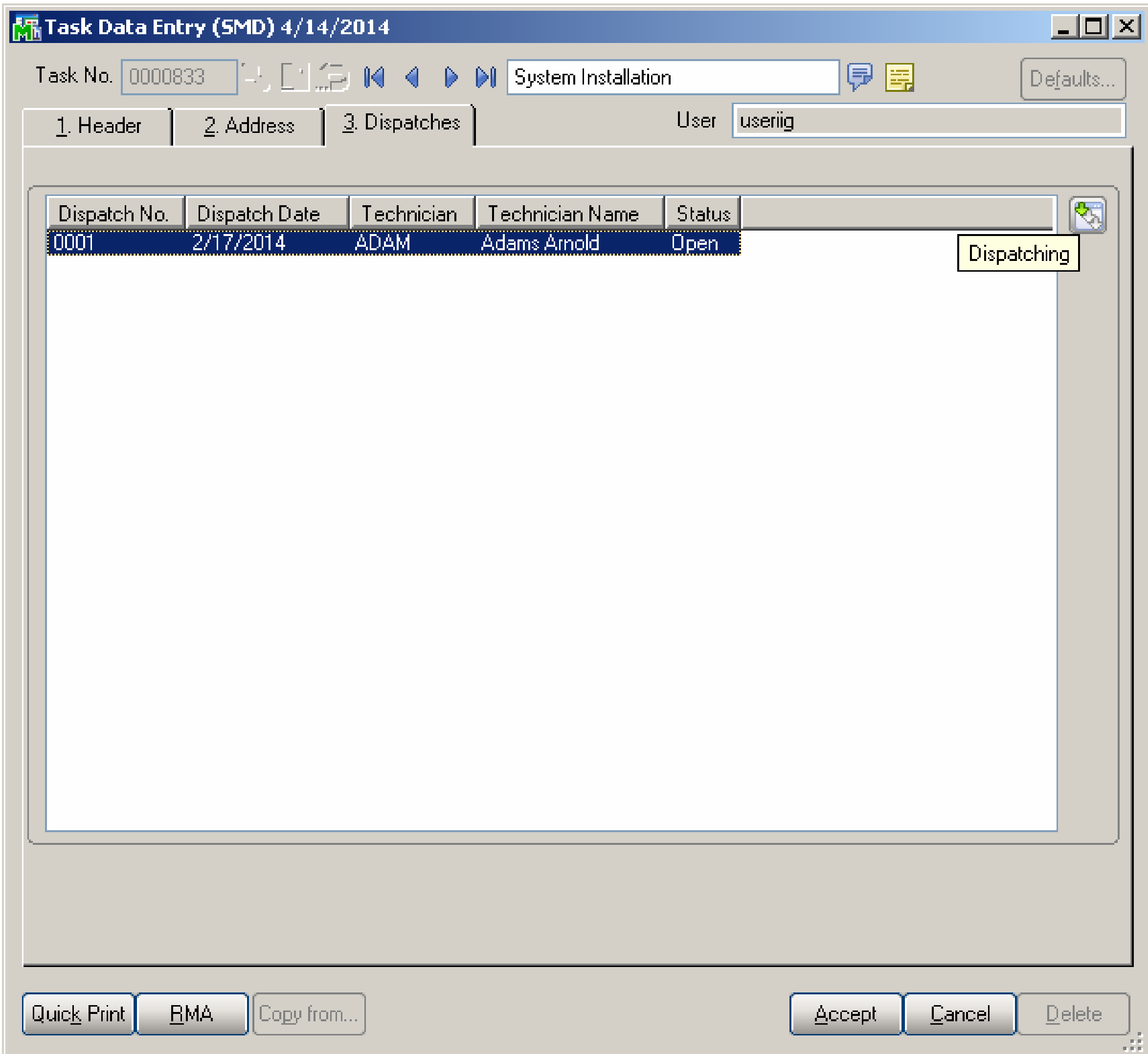
The **Hours** button opens the Customer Ship To Hours Inquiry:



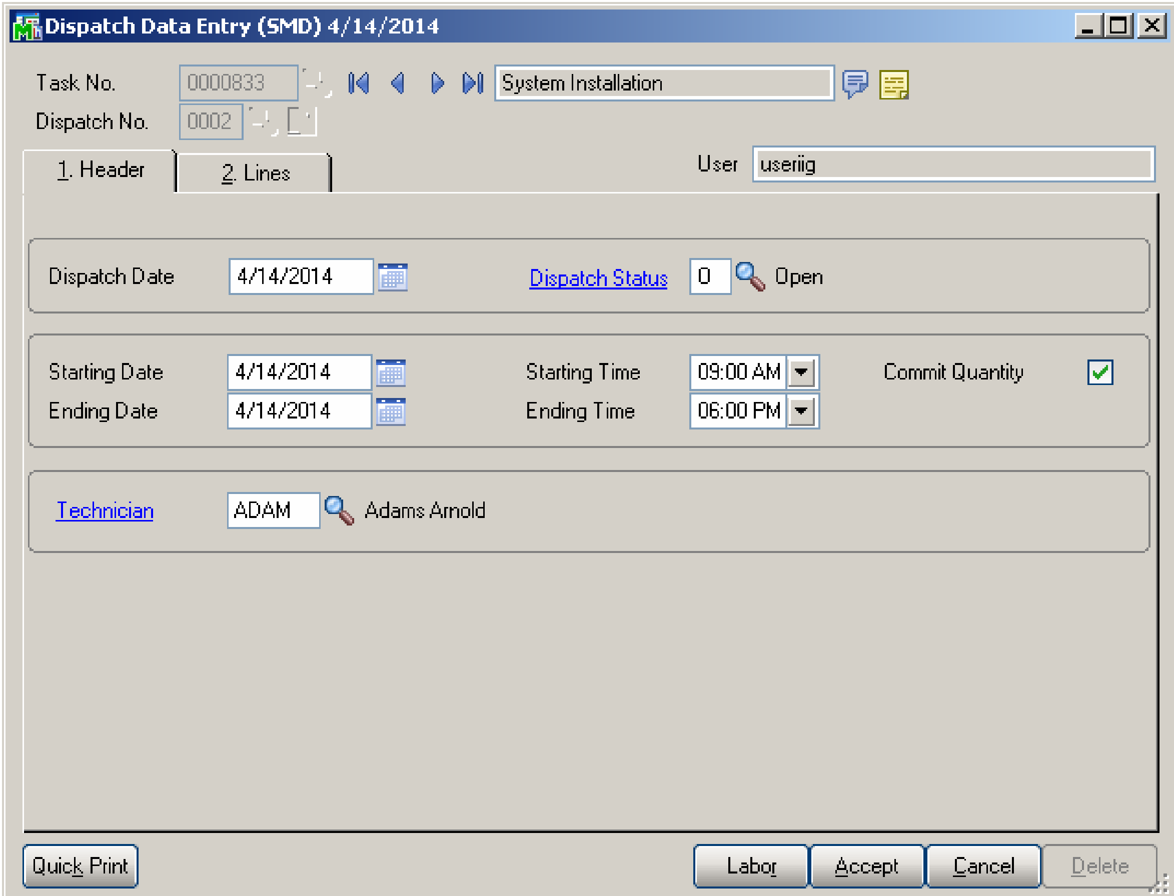
The **Copy Ship To** button allows for copying the **Ship To Address** fields to the respective fields of **Bill To Address.**

Dispatches Tab

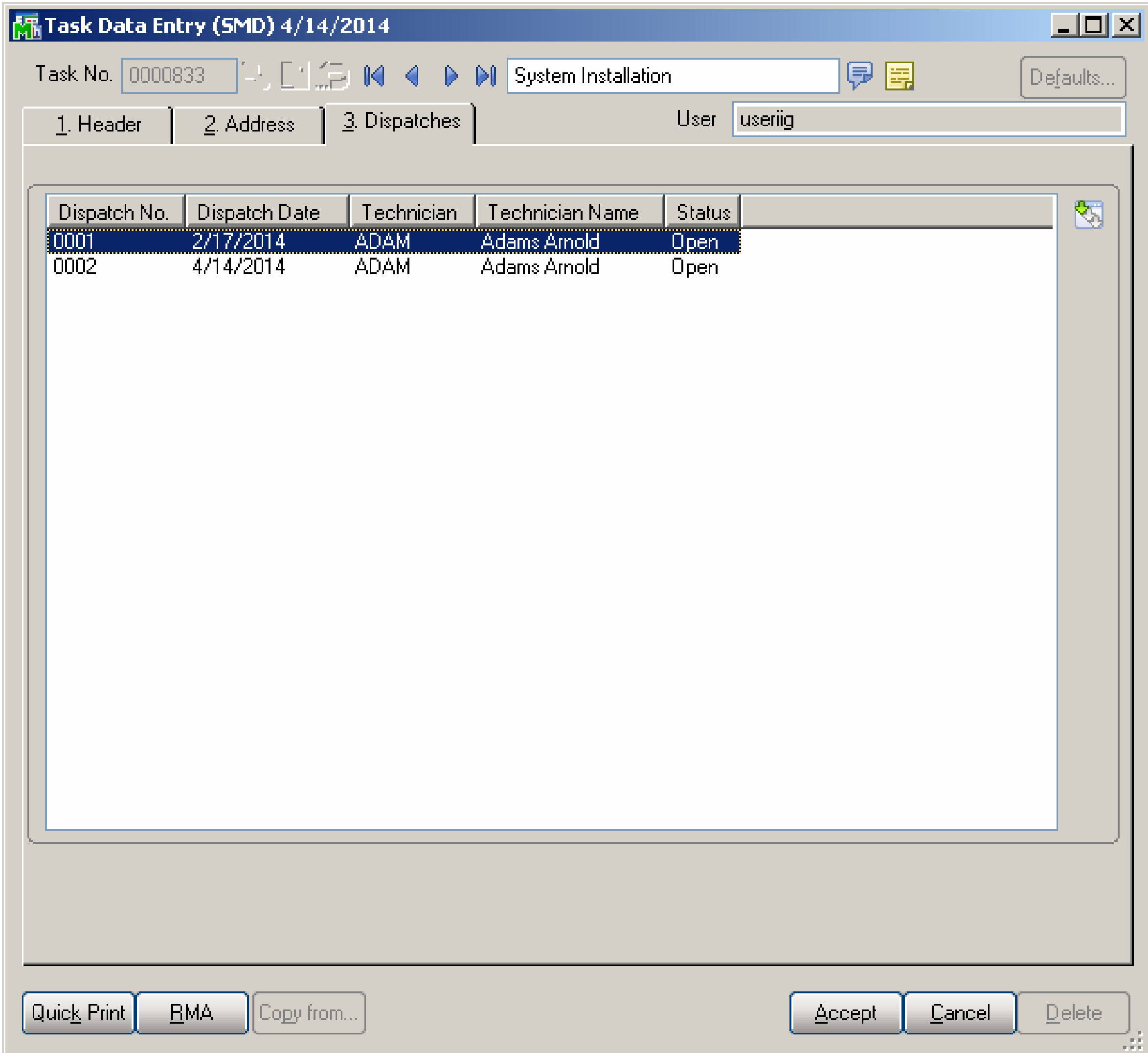
Dispatches tab is intended for generating dispatches. Press to **Dispatching** button to open the **Dispatch Data Entry** screen for the selected task.



The **Dispatch Data Entry** screen is opened with current Task already selected and ready to add a new dispatch to 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.



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.



Clicking the **Dispatching** button displays the selected dispatch in the **Dispatch Data Entry** screen.

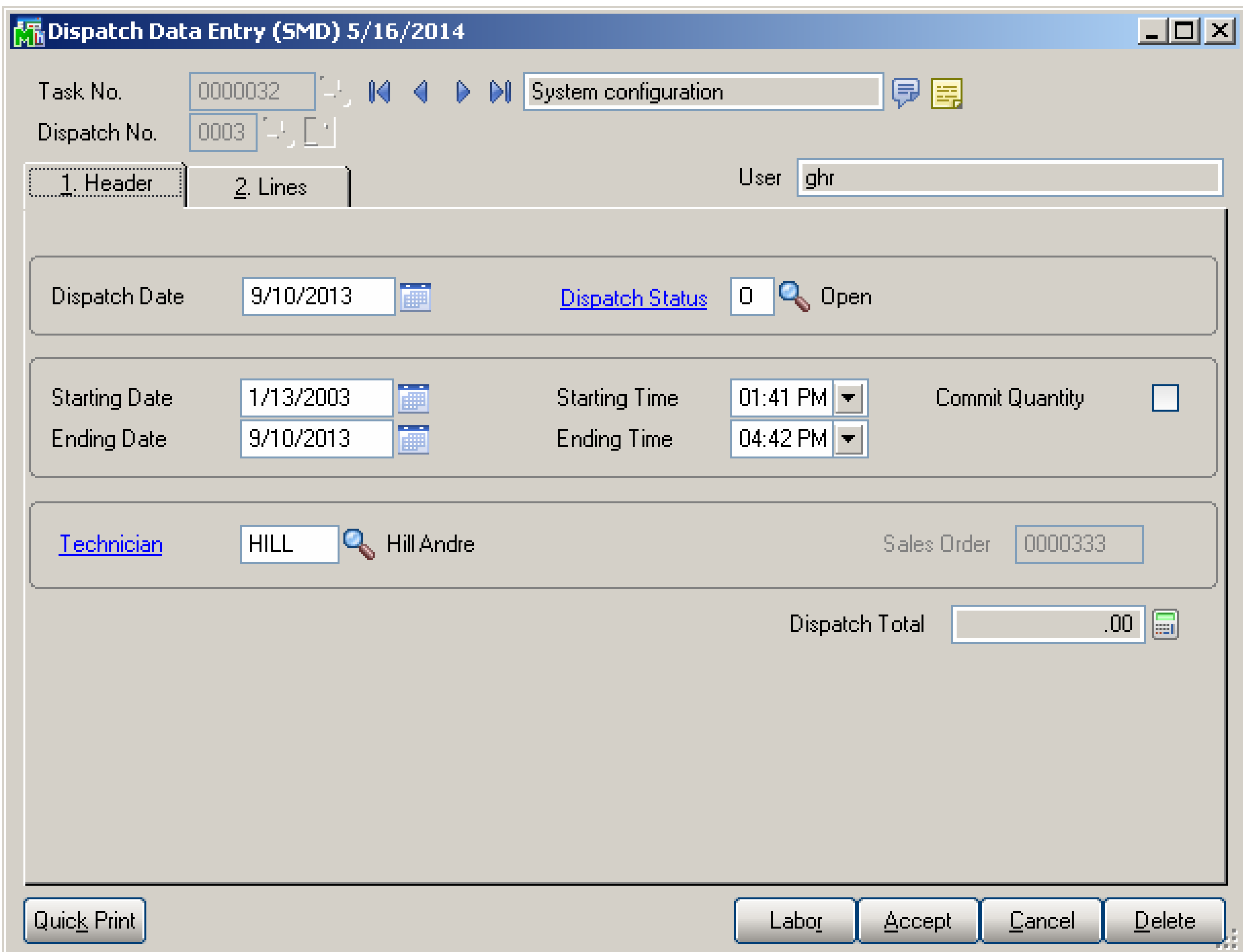
Double-clicking a dispatch line or pressing the Dispatch button opens the **Dispatch Inquiry** screen if the **Status** of the selected dispatch is **Closed**, and the **Dispatch Data Entry** for all the other statuses.

Dispatch Data Entry

The **Dispatch Data Entry** program is used:

1. To dispatch the *tasks entered for a technician*.
2. For control of the overall process, by closing *the dispatch* and *the task* when completed.
3. To enter billing information, a sales order or an invoice must be created for *services rendered*.

Header Tab

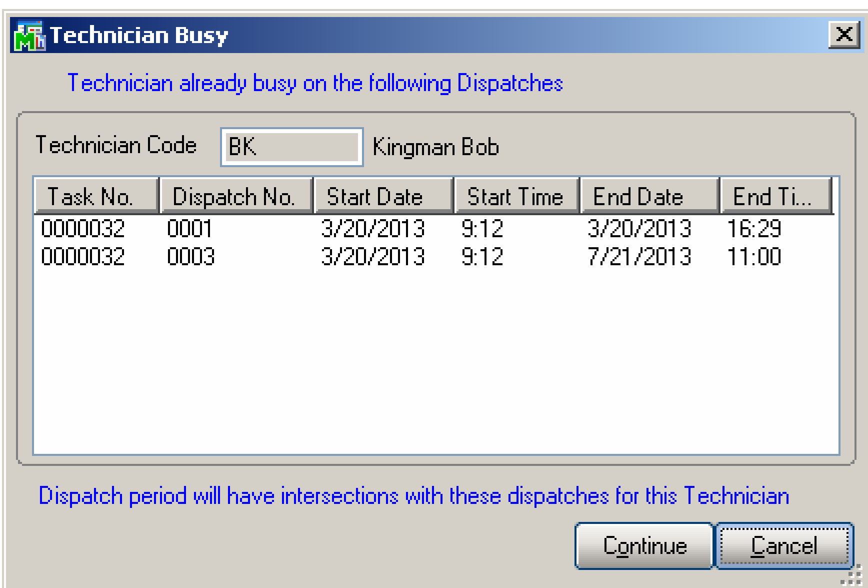


Enter the **Task Number** to be dispatched. Press the **Next Dispatch** number button to create new Dispatch or select the one already created from the Lookup list. The Task Number and Technician Code, if specified, and the Dispatch Dates are automatically loaded. The Dispatch Date is defaulted to current 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 checked against the Contract Dates.

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 prompt to load the Preferred Technician to the new created Dispatch, while the task has no dispatch for the Preferred Technician.

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 following screen will be displayed:

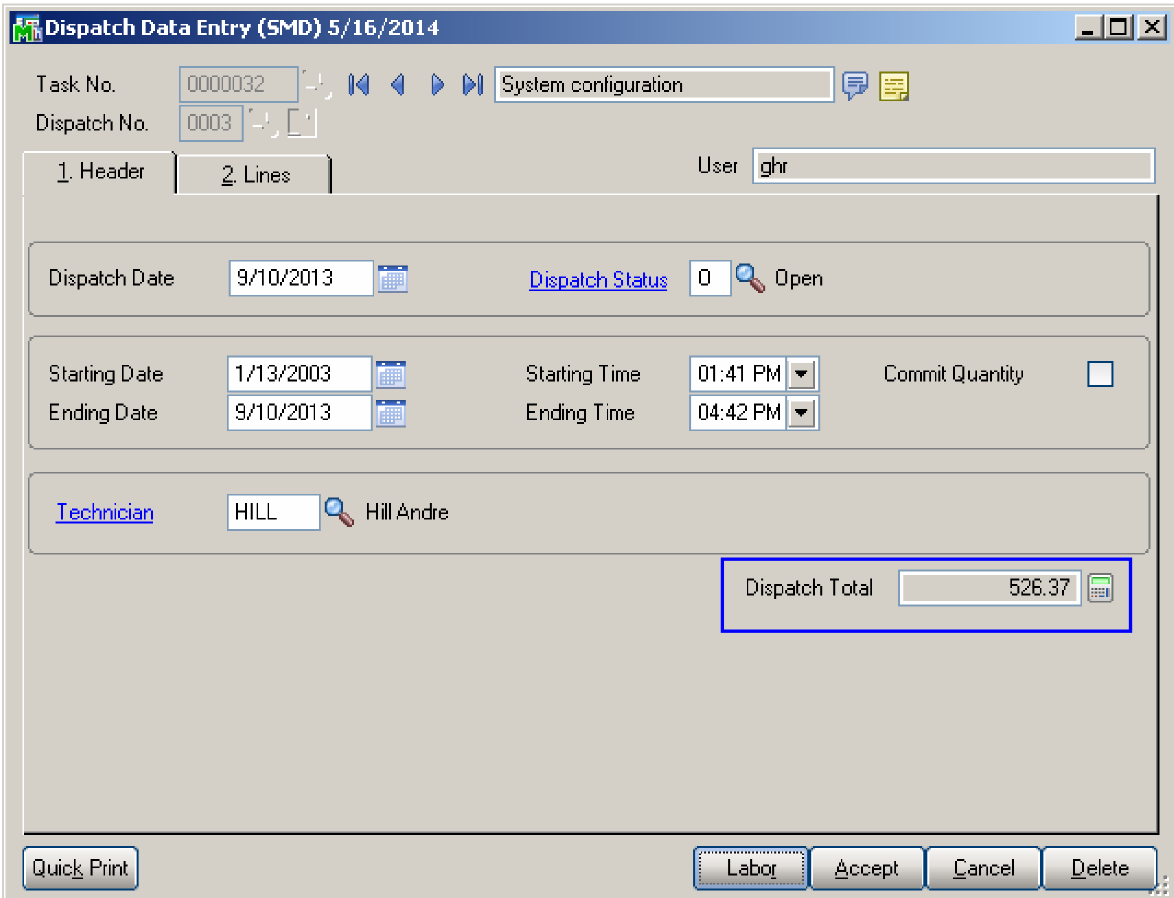


The screen lists all the intersecting Dispatches with their Starting and Ending Date/Time.

Click **Continue** to accept the Dispatch despite the intersecting dispatches.

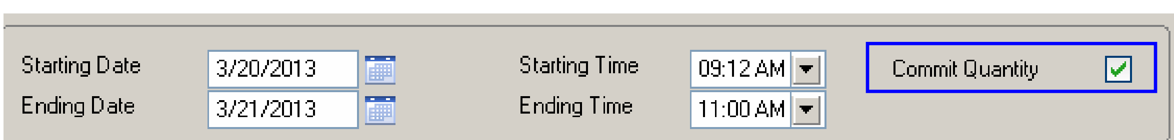
Click **Cancel** to return to the Dispatch Entry screen without saving.

When all field entries are complete for the Dispatch, the **Dispatch Total** field displays the total for all lines items, labor charges, applicable freight, and tax amounts, minus any applicable discount. This field can only be viewed.

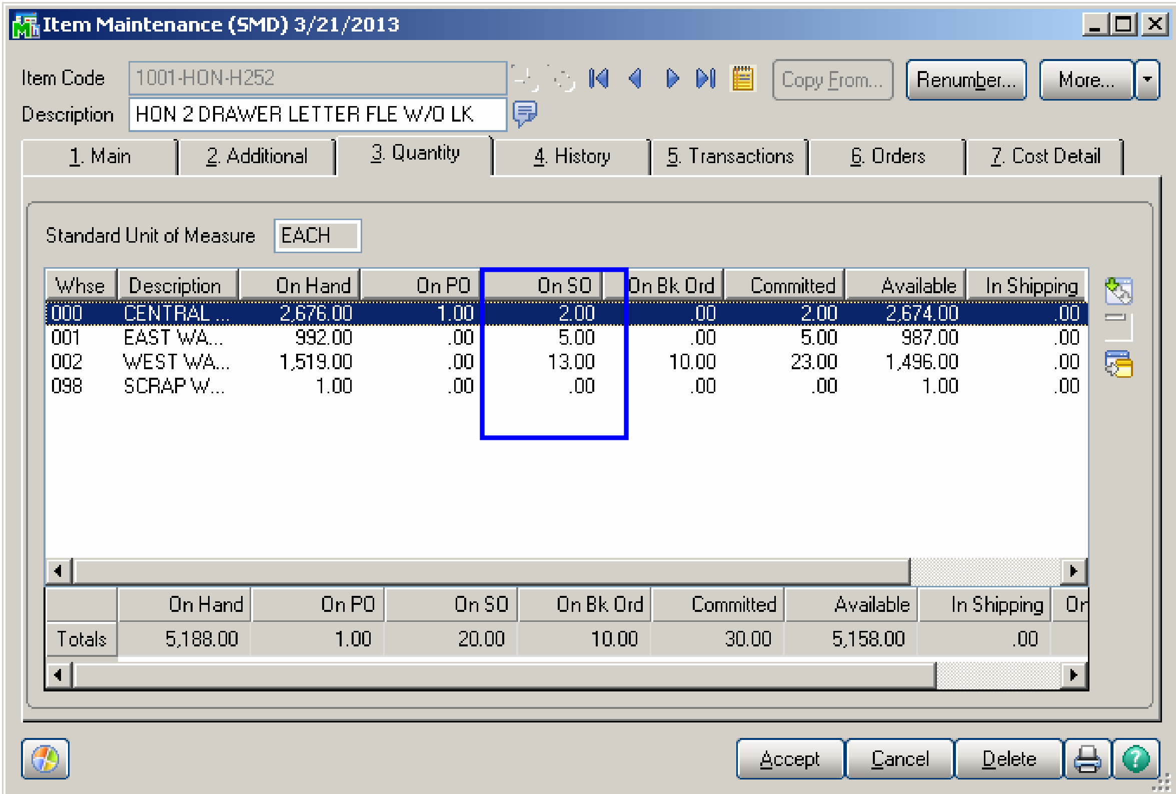


Reservation Process in Dispatch Data Entry

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.

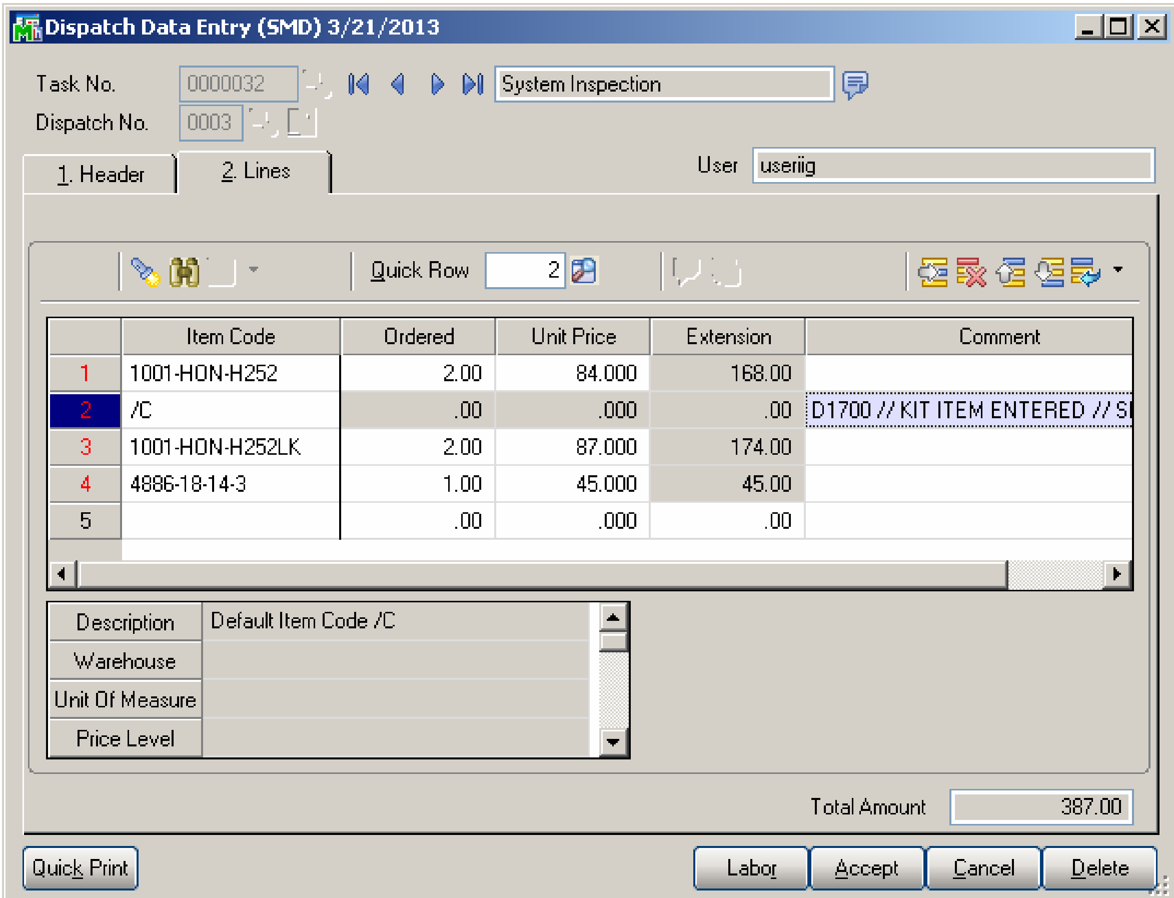


If this checkbox is selected the **On SO** field value on the **Quantity** tab of the Item Maintenance will be updated correspondingly when the Item is added to the dispatch.


Item Maintenance (SMD) 3/21/2013
Item Code 1001-HON-H252
Description HON 2 DRAWER LETTER FLE W/O LK
Copy From...
Renumber...
More...
1. Main
2. Additional
3. Quantity
4. History
5. Transactions
6. Orders
7. Cost Detail
Standard Unit of Measure EACH
Whse Description On Hand On PO On SO On Bk Ord Committed Available In Shipping
000 CENTRAL ... 2,676.00 1.00 2.00 .00 2.00 2,674.00 .00
001 EAST WA... 992.00 .00 5.00 .00 5.00 987.00 .00
002 WEST WA... 1,519.00 .00 13.00 10.00 23.00 1,496.00 .00
098 SCRAP W... 1.00 .00 .00 .00 .00 1.00 .00
On Hand On PO On SO On Bk Ord Committed Available In Shipping
Totals 5,188.00 1.00 20.00 10.00 30.00 5,158.00 .00
Accept
Cancel
Delete

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



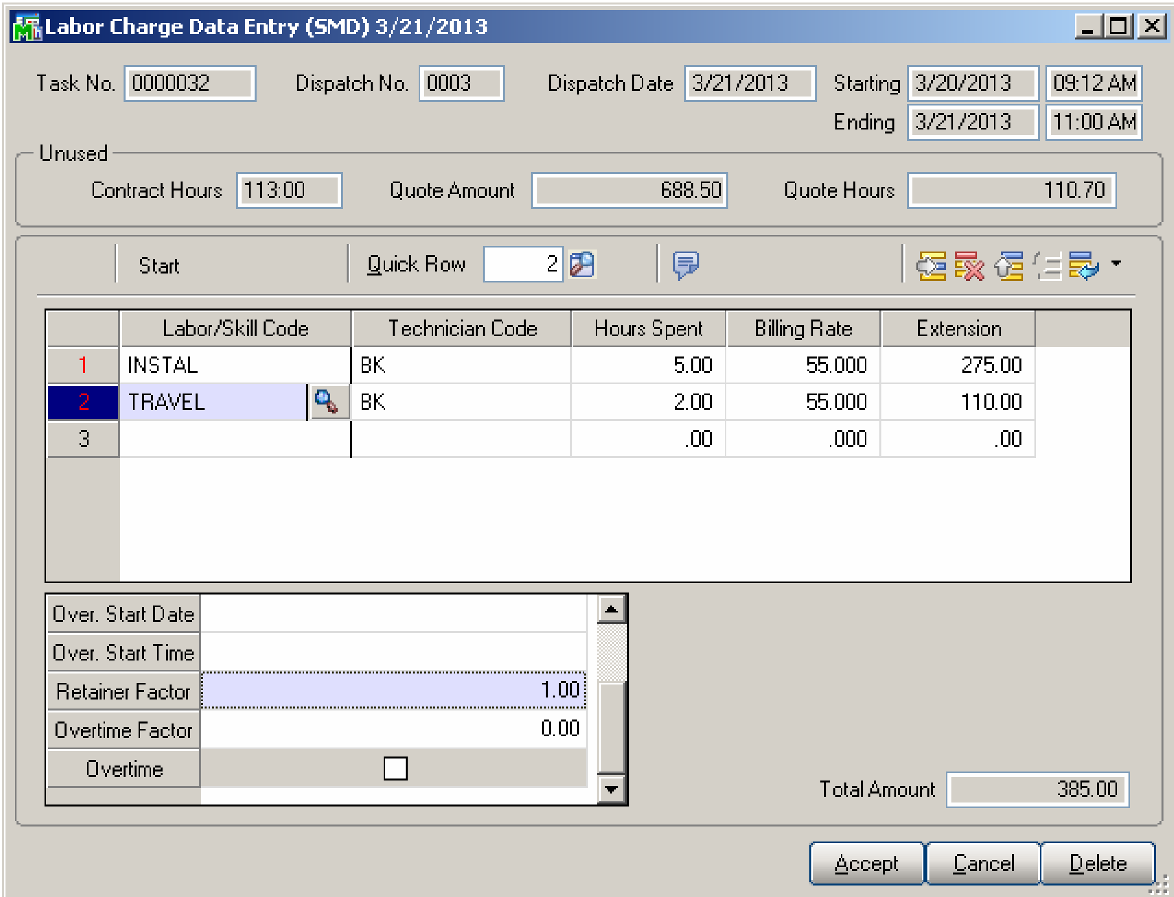
If there is Default Warehouse Code assigned to the Technician of current Dispatch it is automatically loaded when entering new line in the Dispatch.

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** check 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.



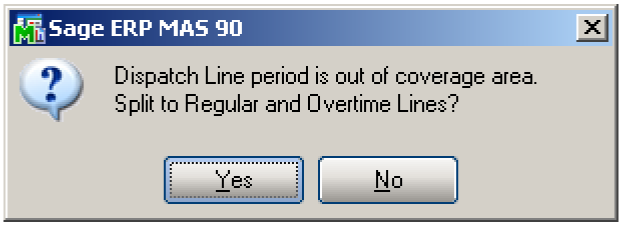
Enter the **Technician Code** of the technician specified for the assignment.

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.

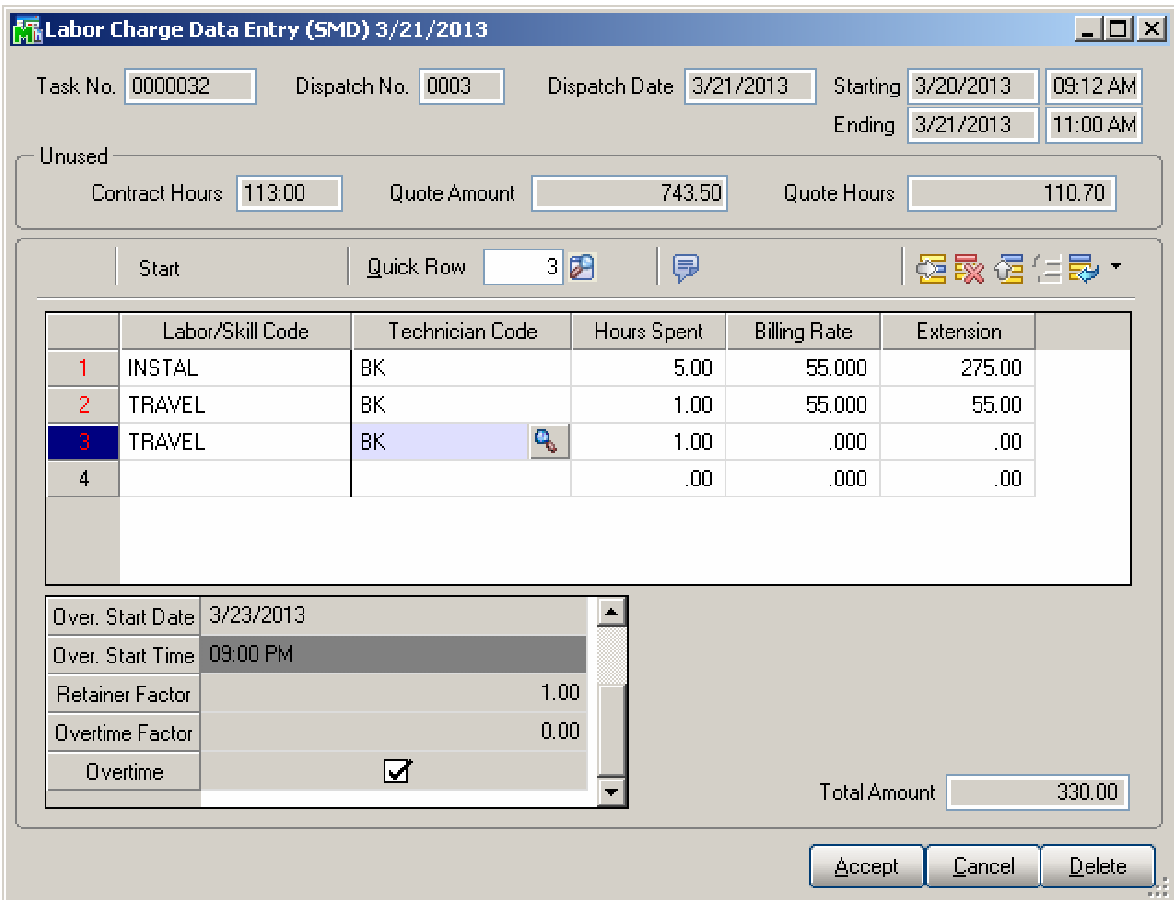
The **Starting Date/Time** fields are visible on the **Labor Charge Data Entry** screen, if the **Use Overtime calculation for Labor** box is checked in the **Service Management Options**.

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:



After splitting, the **Rate** can be recalculated based on the Contract **Apply Rates only during Coverage period** setting. The Overtime line will be checked as **Overtime**.



For the **Fixed Hours** contracts, the hours will be multiplied by the **Retainer Factor** before subtracting from the **Contract Hours**.

The **Hours Spent** field specifies 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 **Labor only** or **Labor with materials** 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**. If the setting is **Labor with material,** the **Tax Classes** of the Dispatch lines will be used only if the Dispatch contains material lines (inventory, miscellaneous, special items). Comments are not considered material lines.

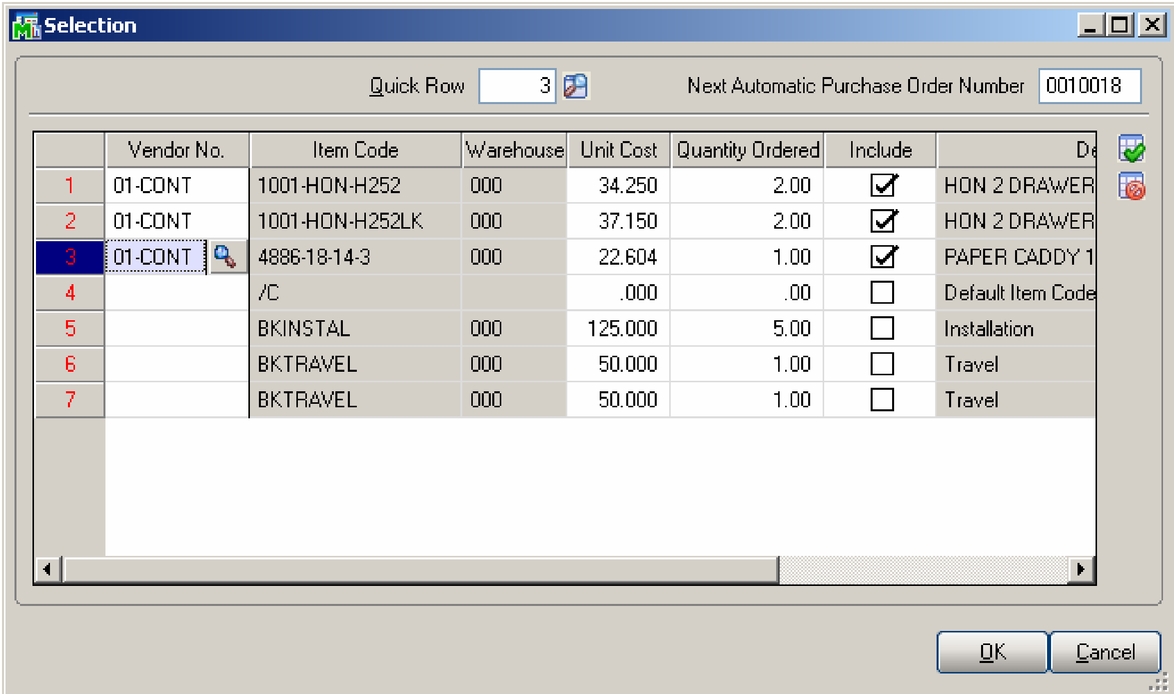
The **Billing Rate** will be determined by the terms of a contract (if any) covering this task. If there is no contract, the rate will be based on the **Billing Rate Calculation Priority** in the **Service Management Options** program, where the priority of the technician, skill, and labor rates is indicated.
If the **Rate** is changed, it will be used for the selected combination of 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.

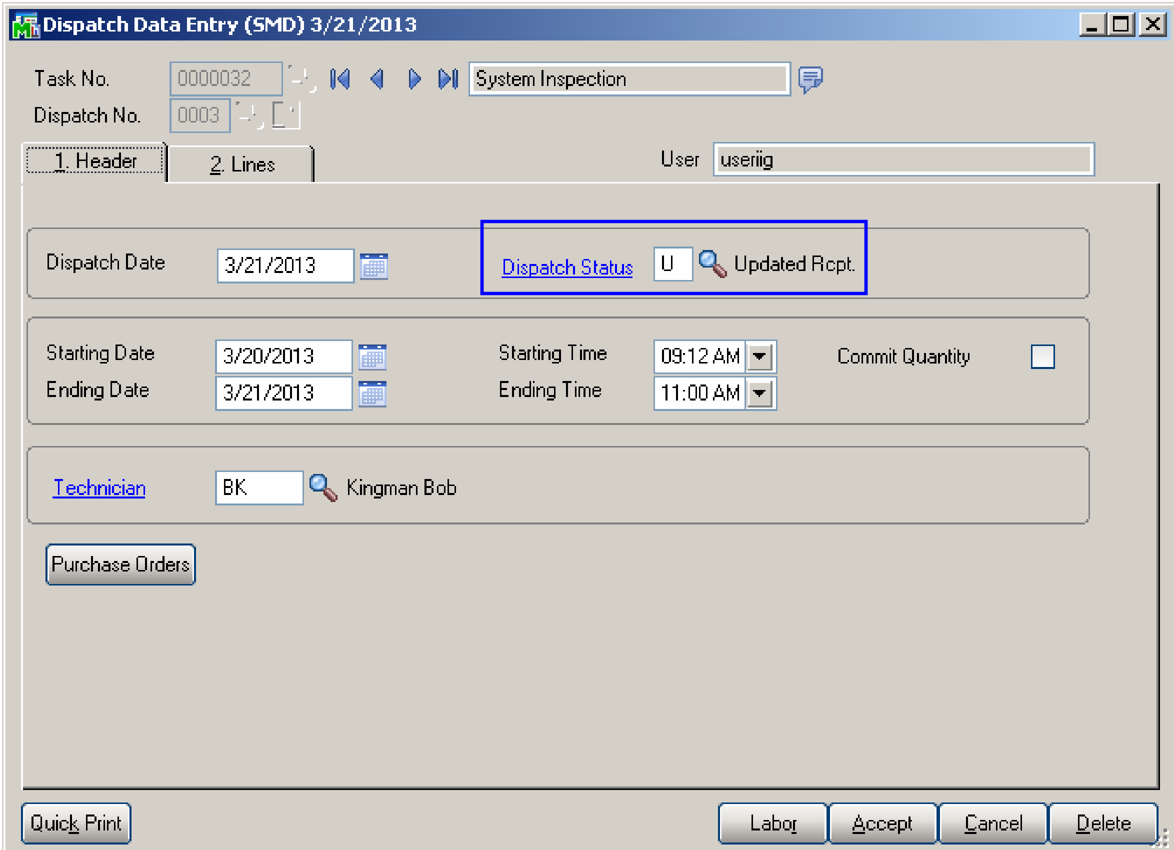
Line information entered in the **Labor Charges Entry** screen (Technician Code, Labor/Skill Code) will be transformed into an item, if the **Labor Billing Presentation** is set to **Inventory Item** on the **Labor/Item** tab of the **Service Management Options** program.



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.

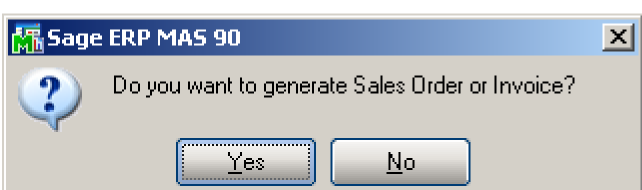


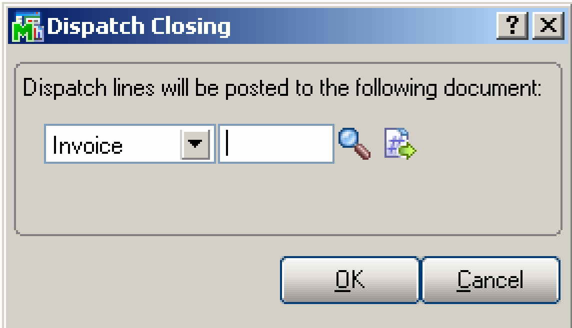
When the items are received in **Receipts of Goods Entry** and updated through the **Receipts Register,** the dispatch status is changed to "**Updated Receipt".**

Dispatch Closing

For closing the dispatch select **C** in the **Status** field from the **Dispatch Data Entry** form.

Closing the dispatch will post all the line information to the specified document, i.e., sales order or invoice. If task has a Customer PO Number specified it will also be posted.





You may, if you wish, 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.

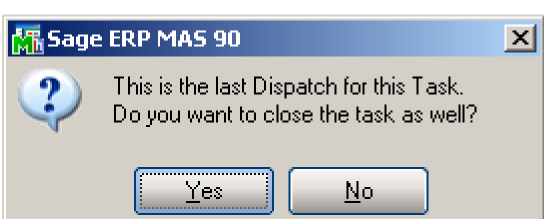
You can choose to post the dispatch to any existing sales order or invoice.

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.

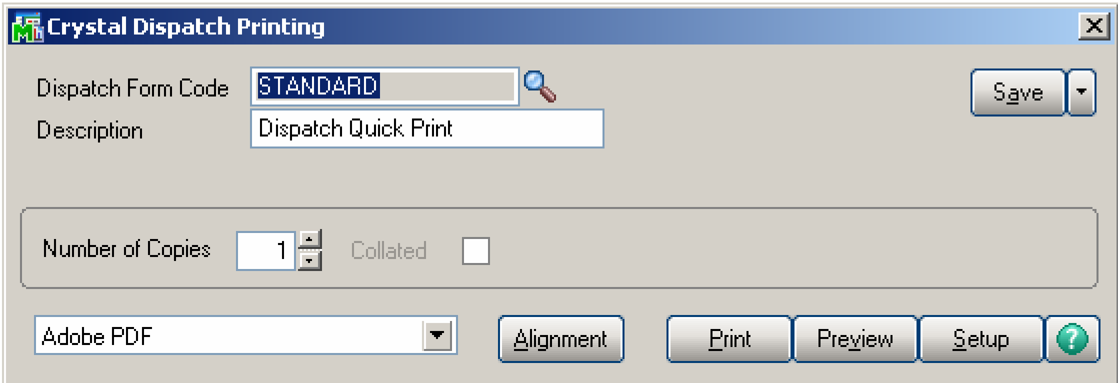
During the closing of the dispatch, line information entered in the **Labor Charges Entry** screen (Technician Code, Labor/Skill Code) will be transformed into an item (Inventory, Special or Miscellaneous) according to the settings in the **Service Management Options** screen.

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.

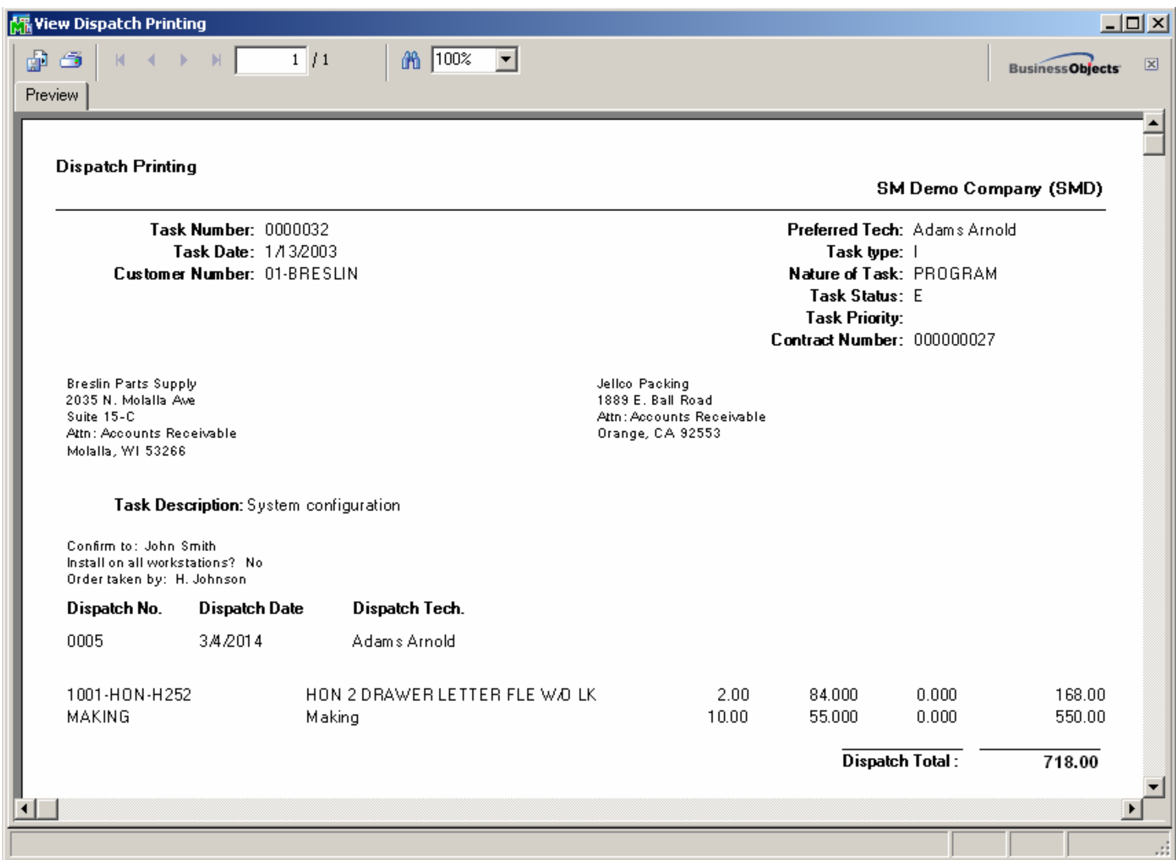
The user is prompted about closing the Task when the last Dispatch for current Task is being closed:



Press **Quick Print** button to run the Crystal Dispatch Printing program:



The answers and questions tied to the Nature of Task of the associated Task Entry are printed on the dispatch report.
Here is an example of printout:



Dispatch Printing

SM Demo Company (SMD)

Task Number: 0000032
Task Date: 1/13/2003
Customer Number: 01-BRESLIN

Preferred Tech: Adams Arnold
Task type: I
Nature of Task: PROGRAM
Task Status: E
Task Priority:
Contract Number: 000000027

Breslin Parts Supply
2035 N. Molalla Ave
Suite 15-C
Attn: Accounts Receivable
Molalla, WI 53266

Jellco Packing
1889 E. Ball Road
Attn: Accounts Receivable
Orange, CA 92553

Task Description: System configuration

Confirm to: John Smith
Install on all workstations? No
Order taken by: H. Johnson

Dispatch No.	Dispatch Date	Dispatch Tech.
0005	3/4/2014	Adams Arnold

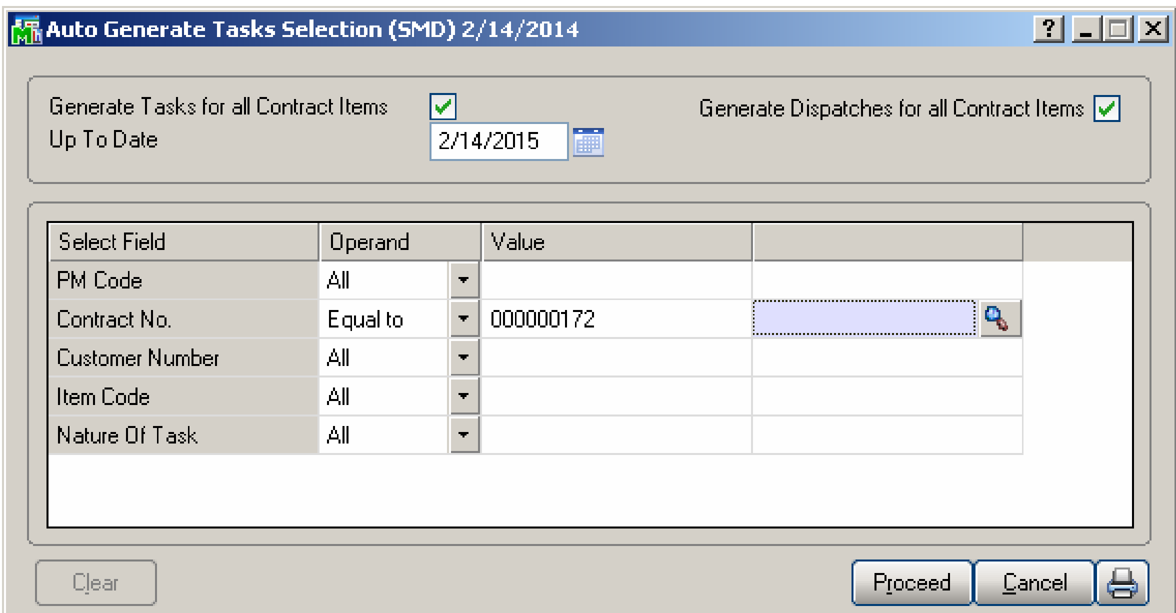
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	2.00	84.000	0.000	168.00
MAKING	Making	10.00	55.000	0.000	550.00

Dispatch Total : 718.00

Auto Generate Task Selection

The **Auto Generate Task Selection** program can be used to automatically generate preventive maintenance tasks based on the requested criteria.

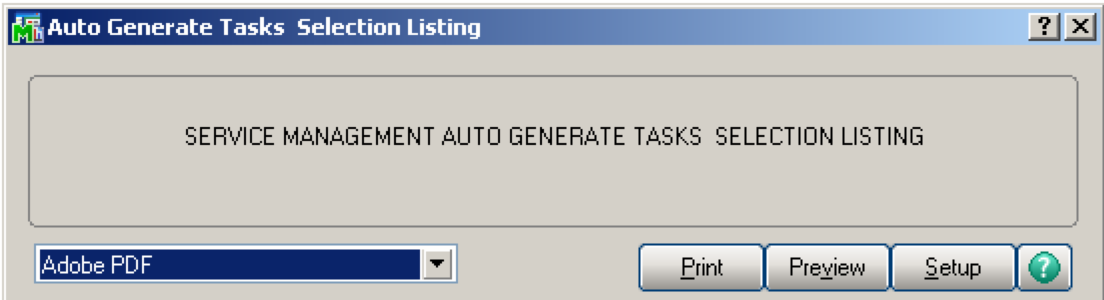
Upon pressing Proceed button the program will look for all the preventive maintenance contracts meeting the selection criteria, utilize the **Days in One PM Period** and **Last Task Generation Date** fields on the contract, and determine whether it is time for another PM to take place.

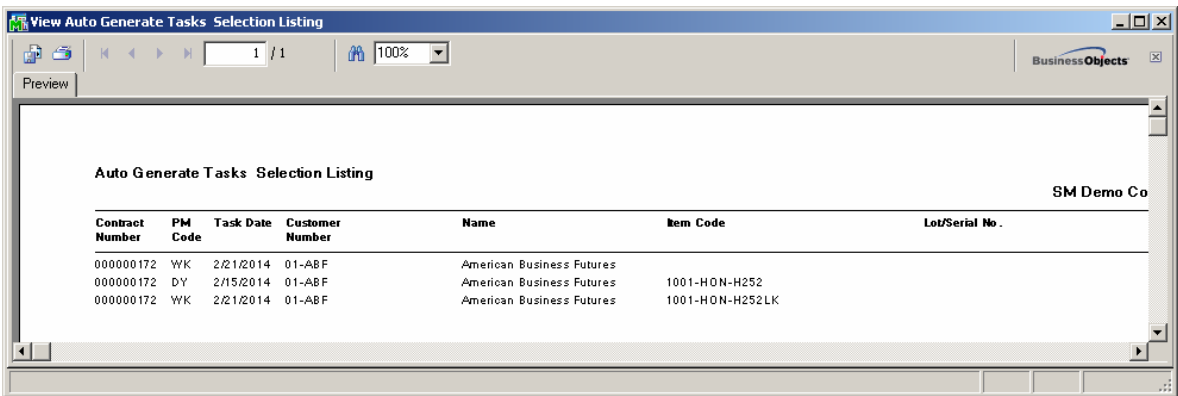


The **Generate Tasks for all Contract Items** check box enables generating tasks for either only Contract Default Item or all the Contract Items.
If this check box is cleared, tasks will be generated only for the **Contract Default Item** (displayed on the **Header** tab of the **Contract** screen).
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.

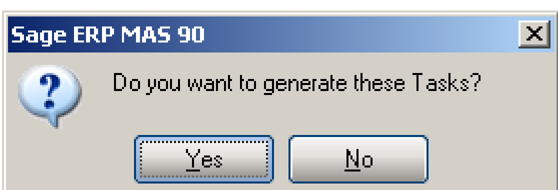
The **Generate Dispatches for all Contract Items** option allows for automatically creating Dispatches by the Technician specified on the Contract header. The Components added for a Contract Item in the Contract Item Maintenance will be automatically loaded into the generated Dispatch lines. It is necessary 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 Codes**, **Contract Numbers**, **Customer Numbers** and **Item Codes**.
Press the Print button to review/print the list of tasks being generated





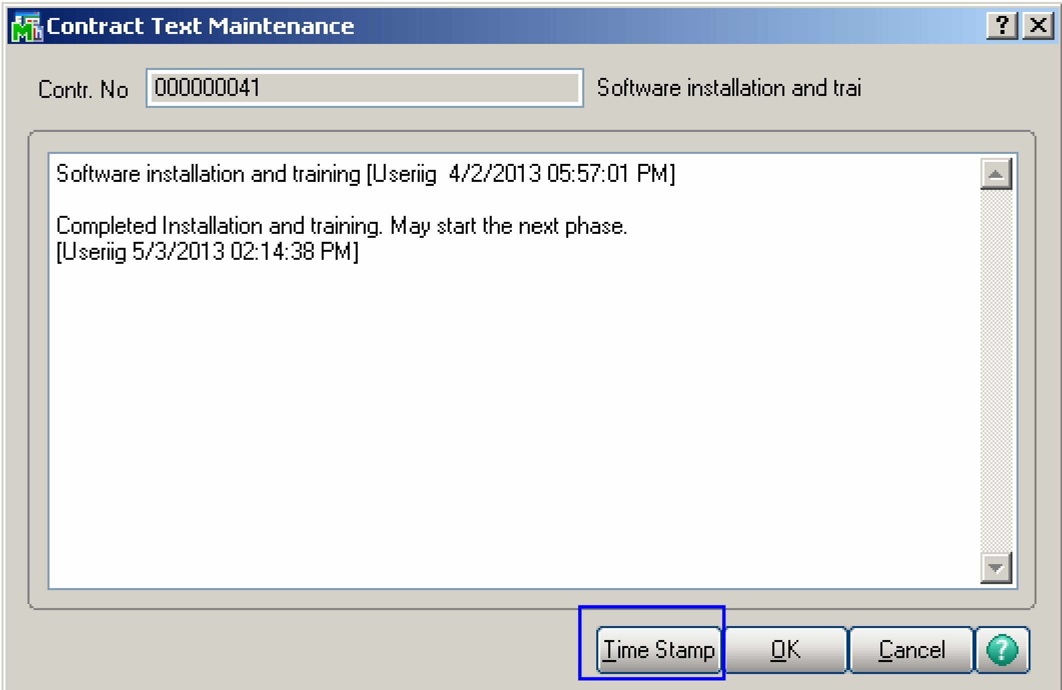
Select Yes to generate the Tasks.



Tracking Changes on Contract and Task Notes

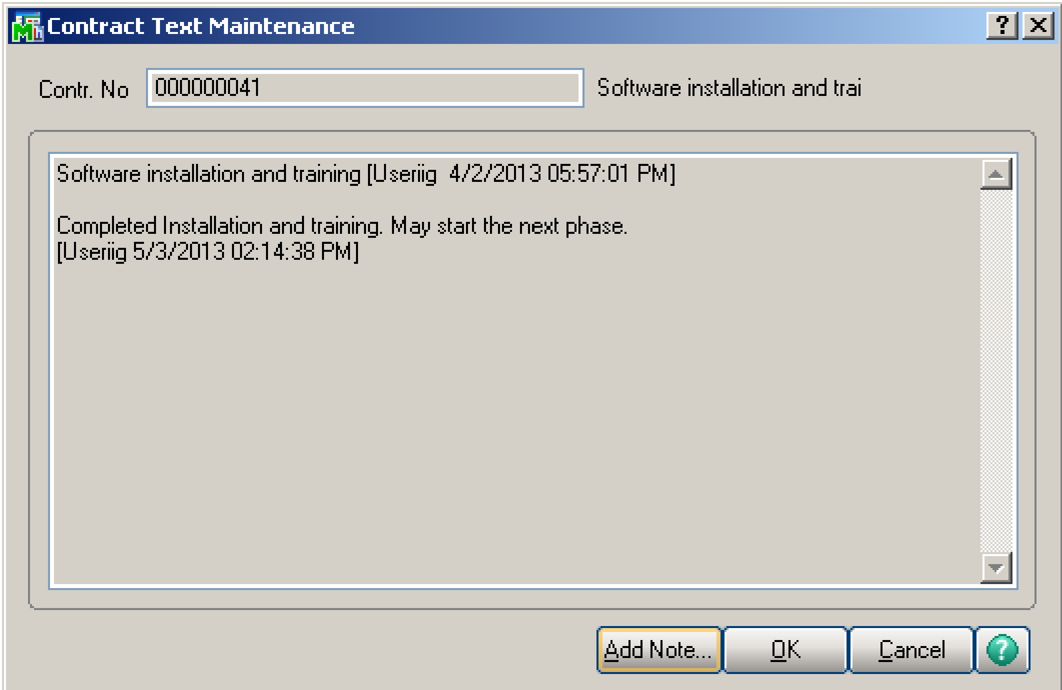
Contract Data Entry

The **Contract Data Entry** program has been modified to provide an ability to track changes to Contract note (Contract Extended Description).Each change made in the Contract Text Maintenance should be stamped by the **Time Stamp** button.

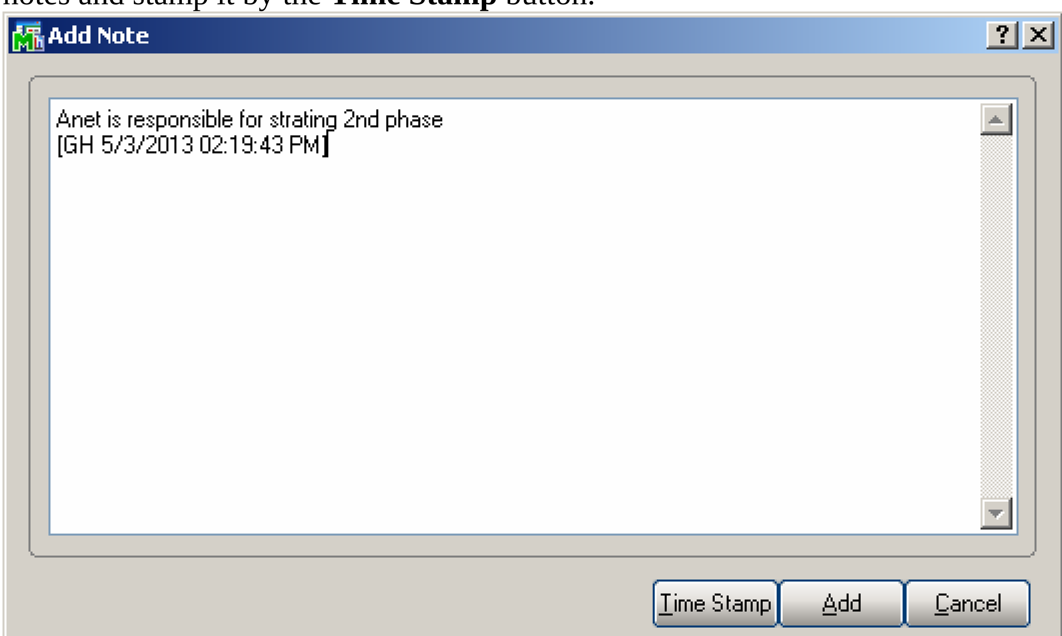


Press the **Time Stamp** button to insert the User ID of the user who edited the Note, the Date and Time when a note is entered /edited. MAS system User ID and the Module Date are applied.

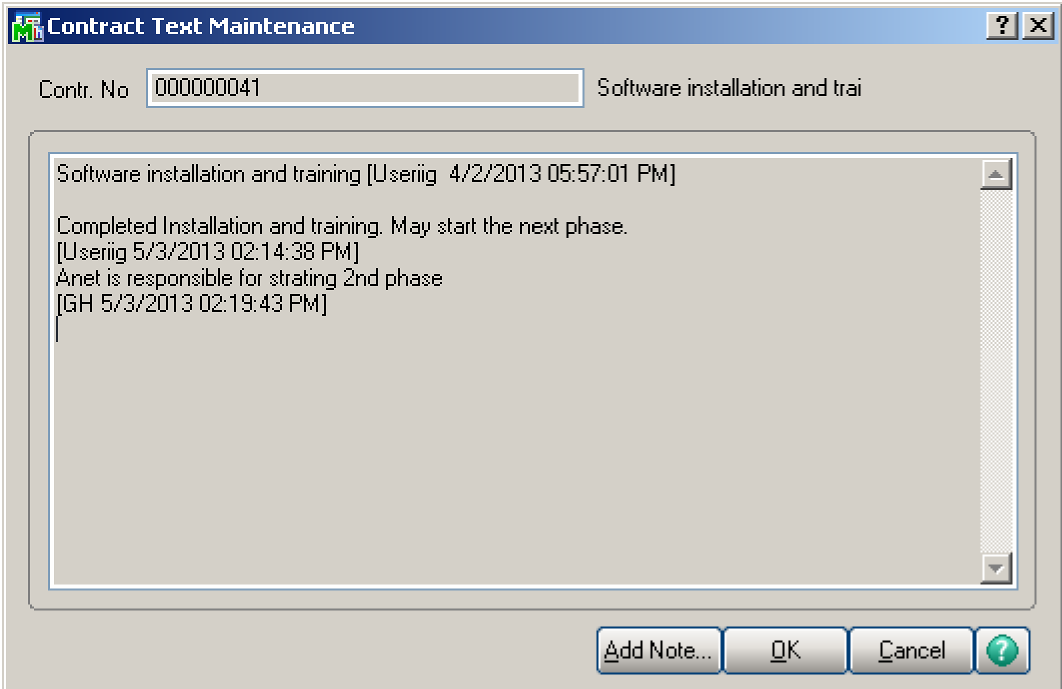
If the user is not authorized to edit the notes, that is, the **Allow Maintain Contract/Task/Dispatch Text** security event is not enabled for that user's Role, the Add Note button is shown on the screen to allow adding new notes without ability of making any changes on the ones already entered:



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.

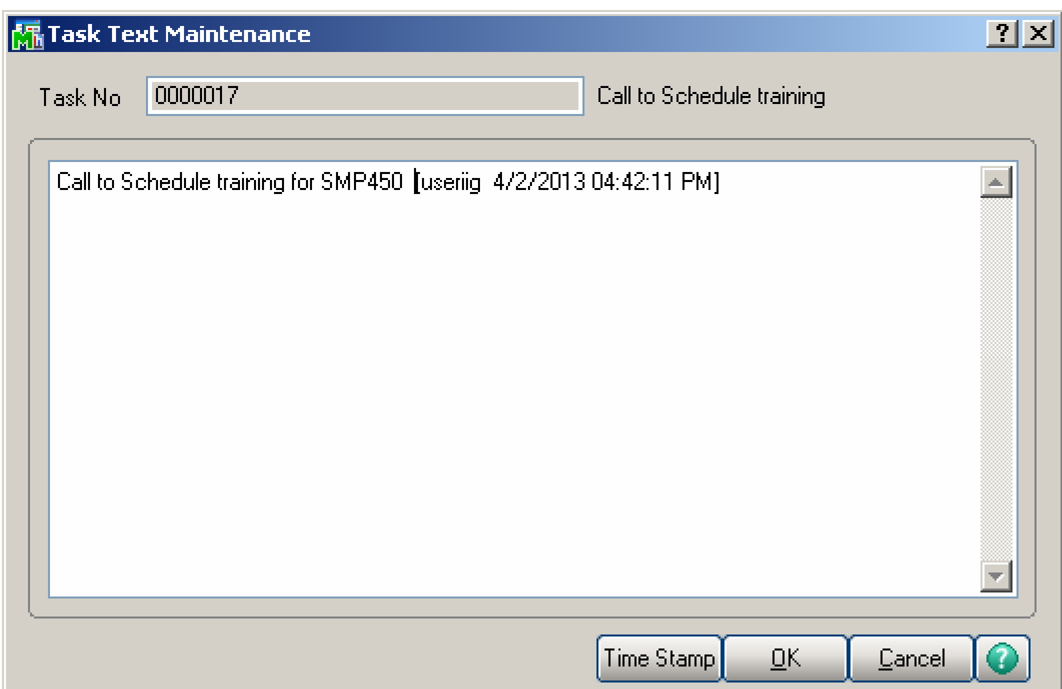


After entering the notes it's necessary to press Add button to append the newly added note to the existing one:



Task Data Entry

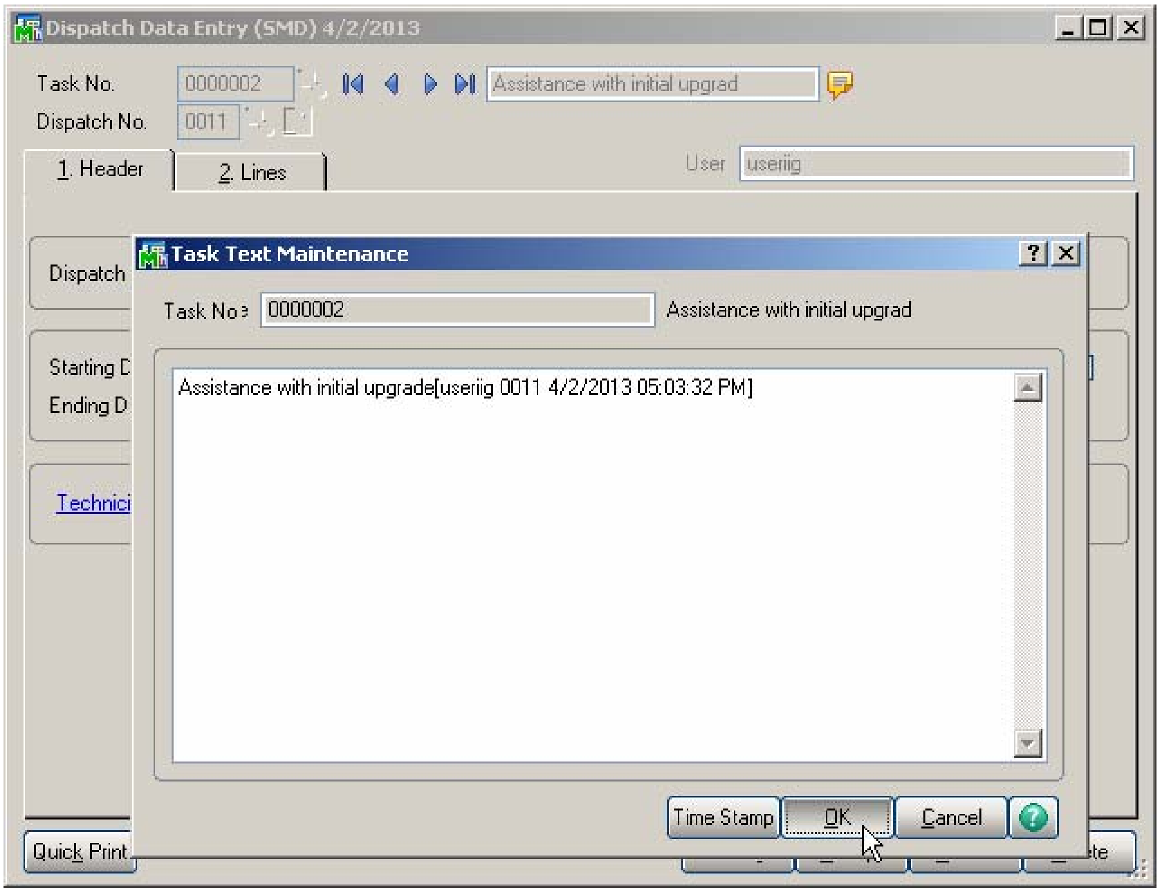
The **Task Data Entry** program has been modified to provide an ability to track changes to Task note (Task Extended Description).Each change made in the Task Text Maintenance should be stamped by the **Time Stamp** button.



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.

Dispatch Data Entry

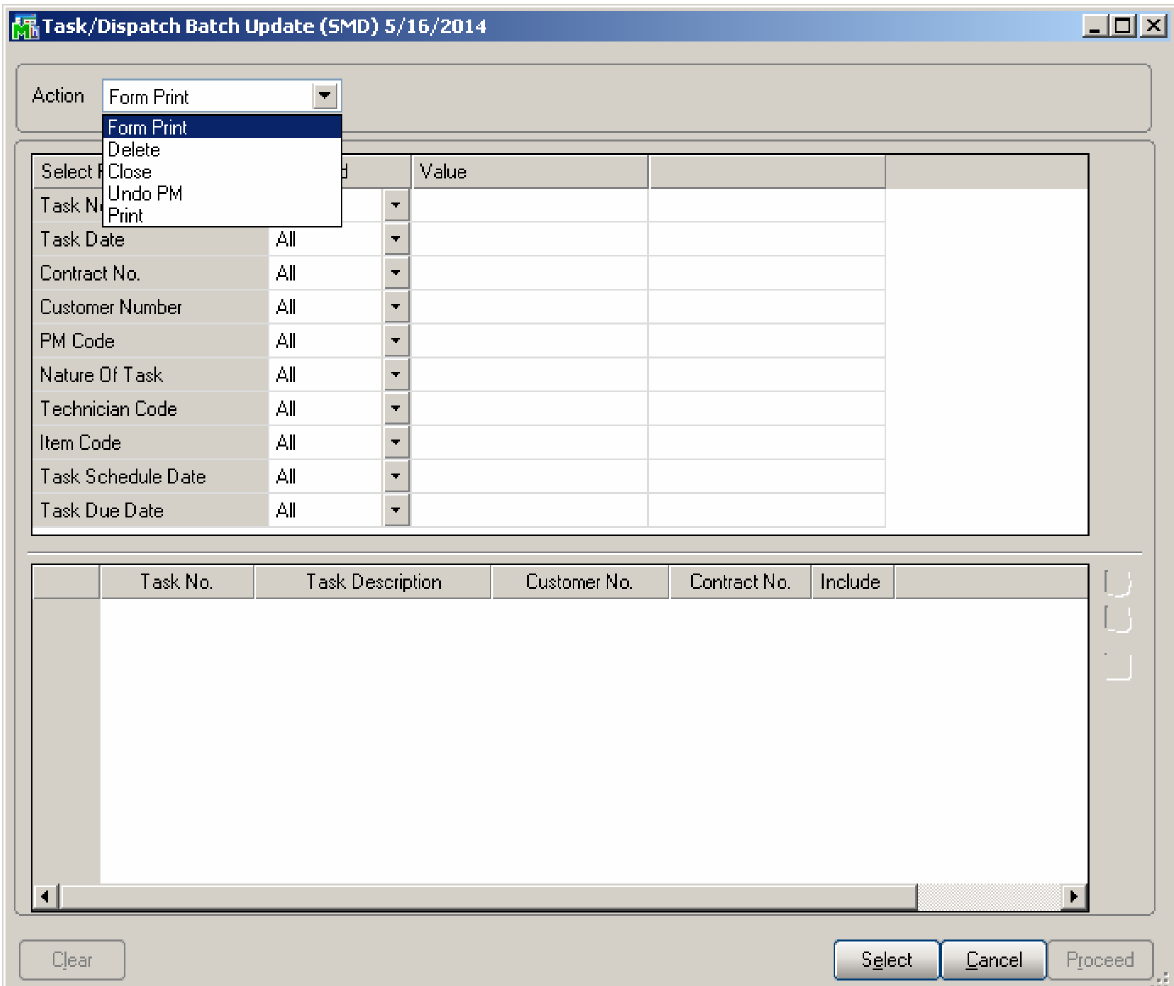
Dispatch Data Entry program has been modified to make the Task Description field editable and allow the users to open and enter information in the **Task Text Maintenance** (Task Extended Description) while entering a dispatch created for that task.



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.

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 Form Print, Delete, Close, Undo PM and Print, on the selected Task



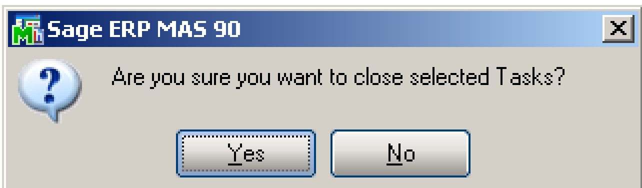
The following selection criteria are available:

- Task No
- Task Date
- Contract No
- Customer Number
- PM Code
- Nature of Task
- Technician Code
- Item Code

- Task Schedule Date
- Task Due Date

Form Print action allows for printing the **Tasks** with the **Form Code** defaulted to the one specified for the Task Type/Nature of Task pair in the Nature of Task Maintenance.
If the selected Tasks are assigned to different Task Type/Nature of Task the Form Code of the last Task printing is used.

The **Delete** and **Close** actions allows for deleting Tasks and closing the ones, which don't have any open Dispatch. The following prompt appears for the user to confirm the Task Delete/Close procedure.



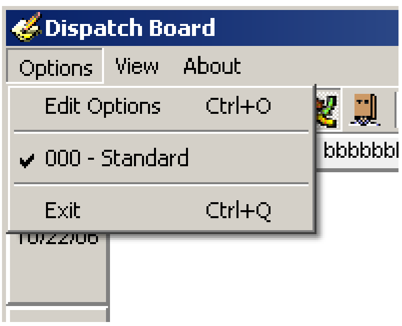
Undo PM action allows for deleting the PM tasks created for a Contract.

Dispatch Board

In order to have the Dispatch Board working integrated with Map Point/ Map Quest it is necessary to purchase also the SMM4.50 (Map Point for SMP)/SMQ4.50 (Map Quest for SMP) enhancements.

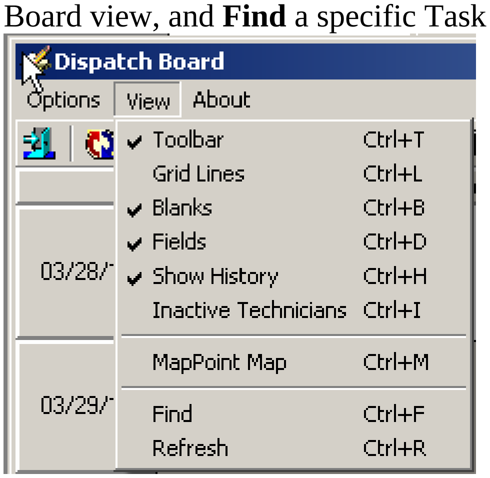
The **Dispatch Board** displays tasks in cells with task dates and technicians placed vertically on the board or horizontally across the top of the board.

The **main menu** located in the upper left corner of the Dispatch Board screen, contains the following submenus.



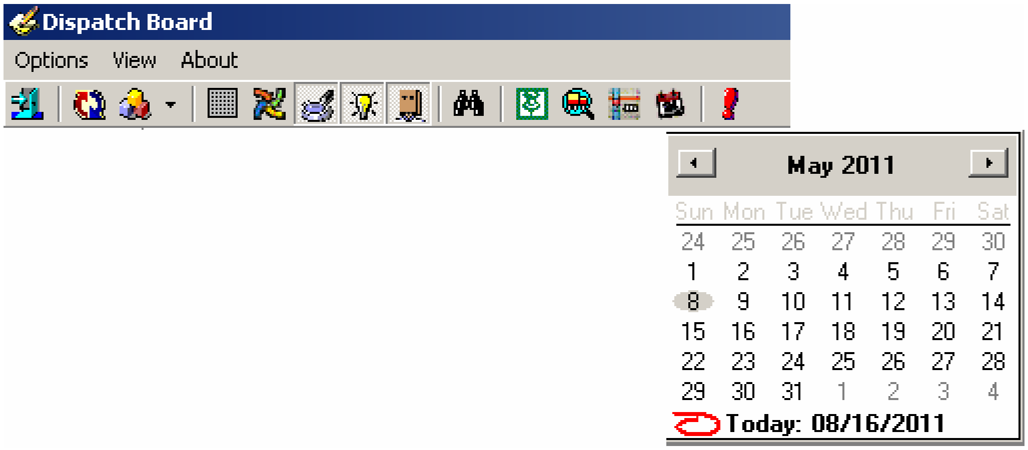
In the **Options** menu, you can select an existing **Options Type**, and **Edit Options** in the **Options for User** dialog box (described later). Current Options Type is indicated with a checkmark.

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, and **Find** a specific Task or Dispatch on the Board.

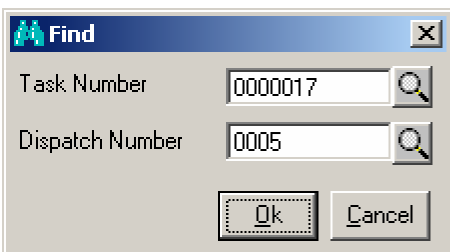


The **Toolbar** enables you to quickly **Exit** the Dispatch Board, **Refresh** the view, **Edit Options**, select **Options Type**, **Show/Hide Grid Lines**, **Blanks**, **Fields**, **Show/Hide**

History, **Inactive Technicians, Find** Task/Dispatch. Current Options Type is unavailable (already selected).

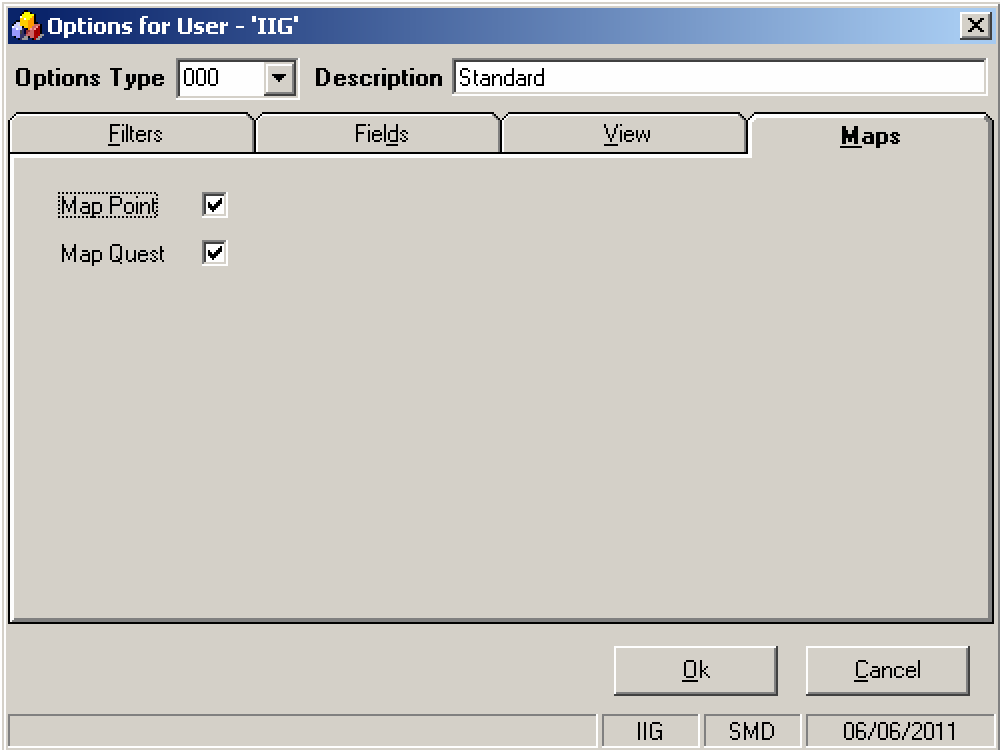


Find allows searching a specific task/dispatch on the Board. When a task has dispatches you will be warned to enter also the dispatch number. A Task Number cannot be found and displayed when it doesn't exist or some options should be changed in order to display it.



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 **MapPoint** and **Map Quest** buttons are available only if the SMM4.50 (Map Point for SMP) and SMQ4.50 (Map Quest for SMP) enhancements are installed and enabled in the Dispatch Board Options:

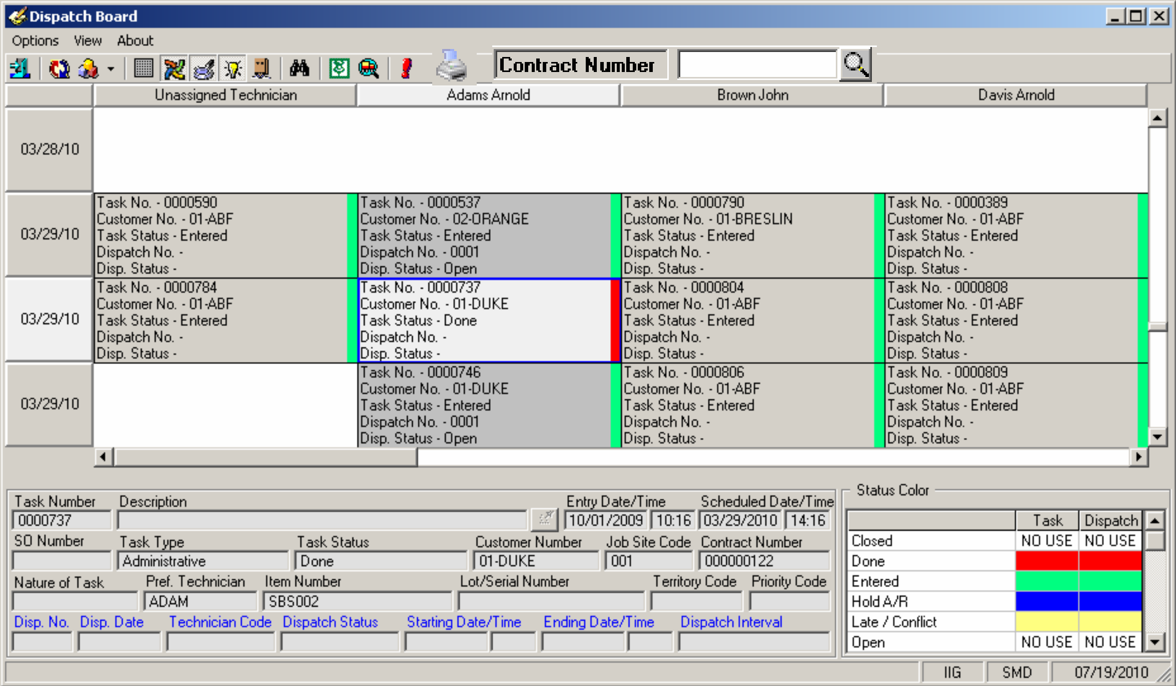


Map Point and **Map Quest** fields become enabled after installing correspondingly SMM4.50 and SMQ4.50 enhancements.

 -The Print button allows for printing the Task/Dispatch report from Dispatch Board:

The **Contract No** 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 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.



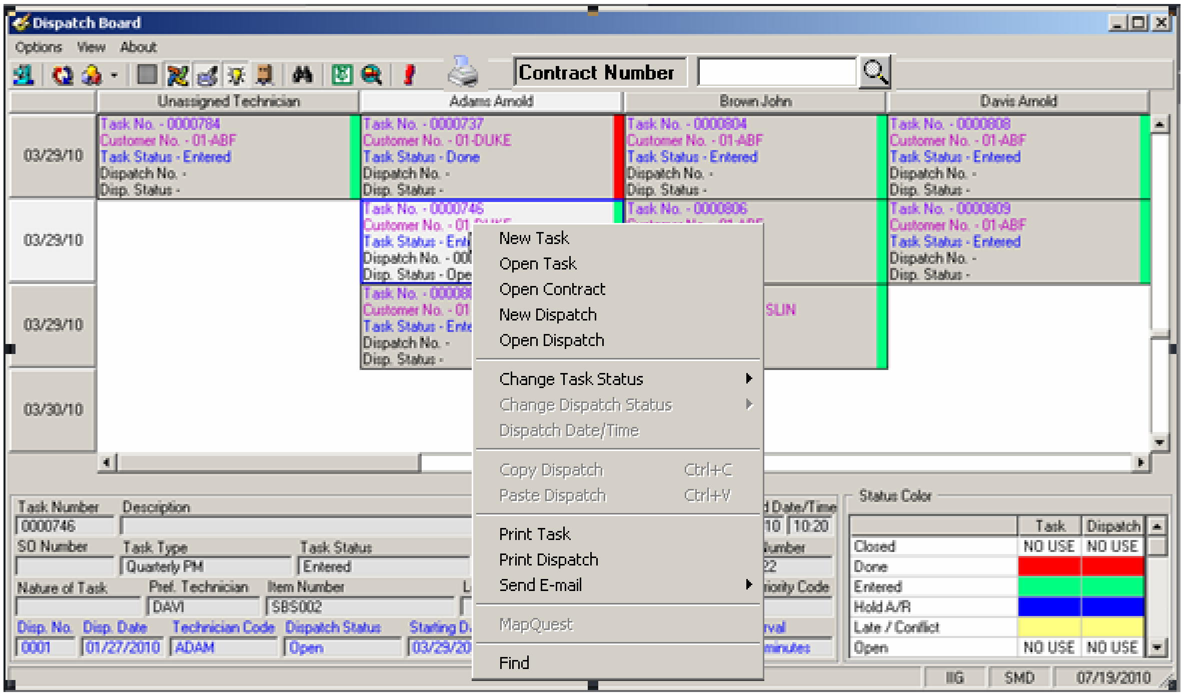
To see the details of a Task/Dispatch in the lower part of the screen, click on the cell containing that Task/Dispatch.

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 (or using the Windows Application key on the keyboard) displays popup menu, from which you can quickly run some programs for the dispatch.
To pass focus to the cells part of the screen (for example, after using Refresh), press Ctrl+G. The left upper cell of the displayed cells will be selected.



New Task- opens the **Task Data Entry** screen ready for new task entry. The **Next Task Number** is selected, and the **Scheduled Date/Time** is set equal to the selected cell Date/Time. The selected cell **Technician** is loaded after selecting the **Customer**.

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.

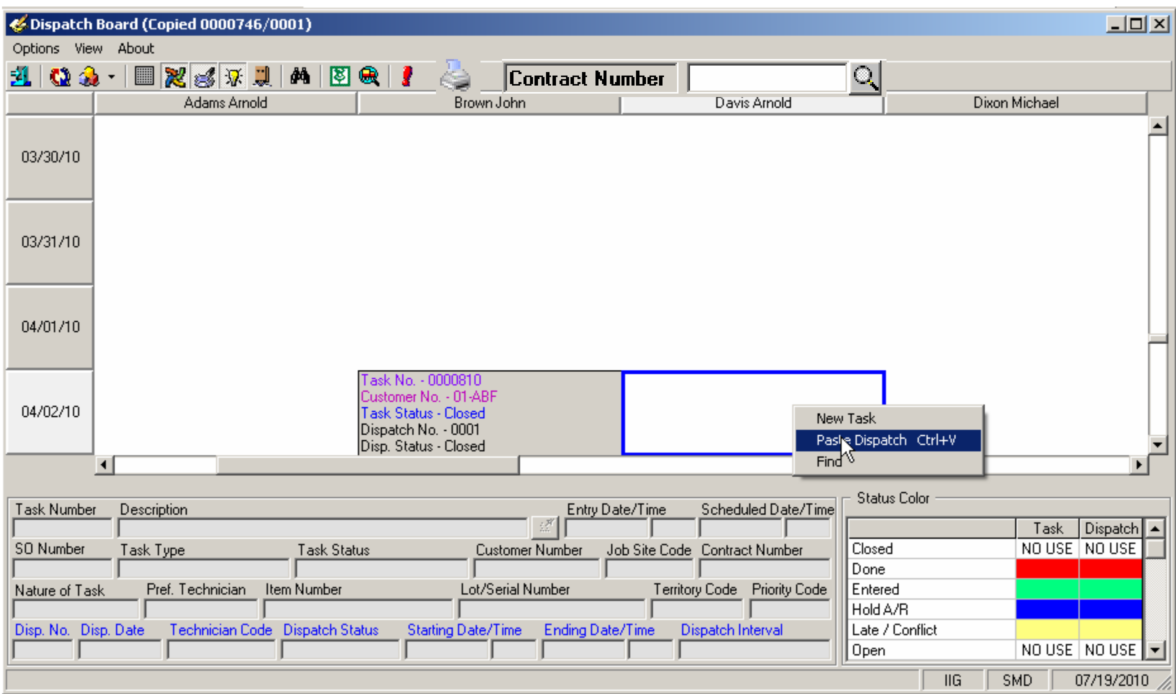
New Dispatch- opens the Dispatch Data Entry screen ready for new dispatch entry for current task.

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.

The Dispatch **Copy/Paste** feature allows the user to easily assign another technician to the same task. If some cell with Dispatch is selected then the user can copy it (right click and select **Copy Dispatch**), and paste to another position on the board. This will result in creation of a new dispatch for the same task, using the Technician Number and Start Date/Time of the paste location. The Dispatch End Time is set automatically so that the duration of the newly created dispatch to be the same as the ones from which it has been copied.
The user can use also the **CTRL+C** and **CTRL+V** key combinations for Copy/Paste function. After the cell is copied corresponding Task/Dispatch numbers are displayed in the Dispatch Board caption.



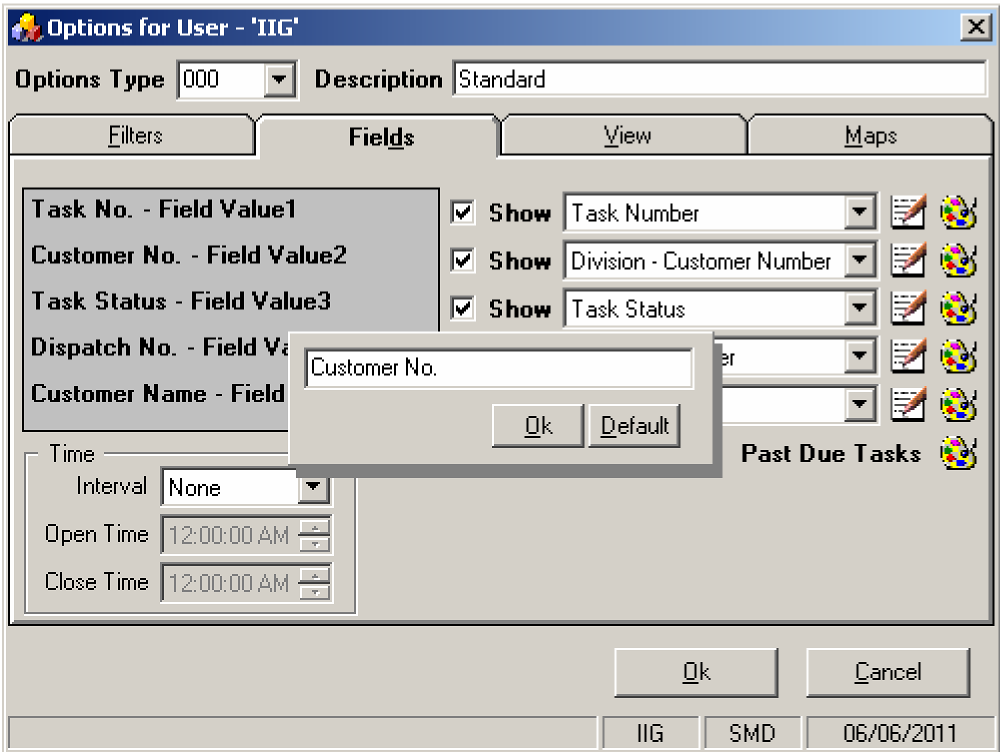
Print Task and **Print Dispatch** open the Crystal Report Printing.

Send E-mail opens mail client. You can send mails to Technician, Customer, or Both.

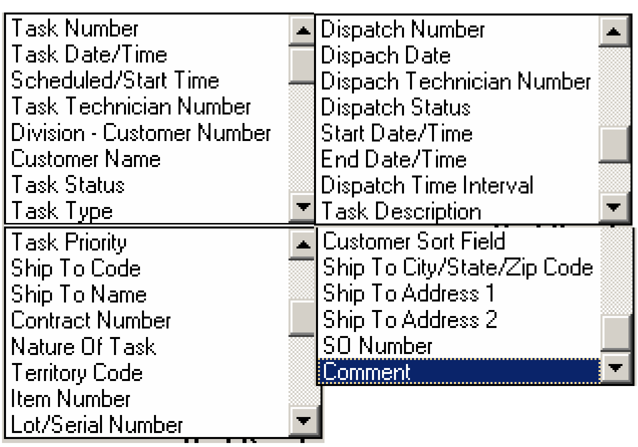
The **Dispatch Boar**d is automatically refreshed when Accepting changes in the Task and Dispatch Data Entries, Closing tasks, creating new tasks and dispatches.

To control which data fields appear in the cells (and their colors), select the **Edit Options** submenu from the **Options** menu.

Click the **Fields** tab in the displayed **Options for User** dialog box.



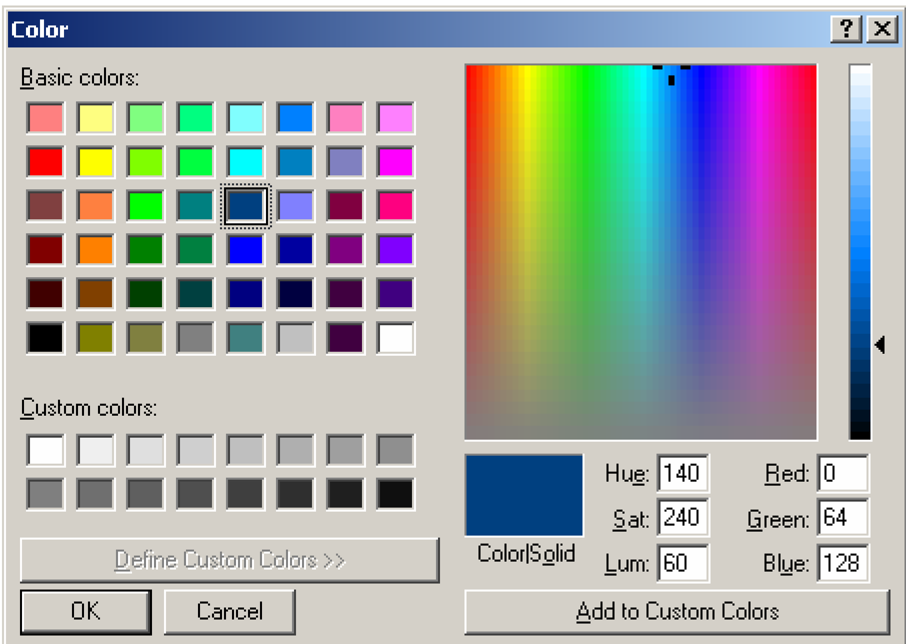
You can choose five data fields to be displayed in the cells of the board. Select fields from the drop-down lists, and see preview on the left.
The following fields are available:



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.

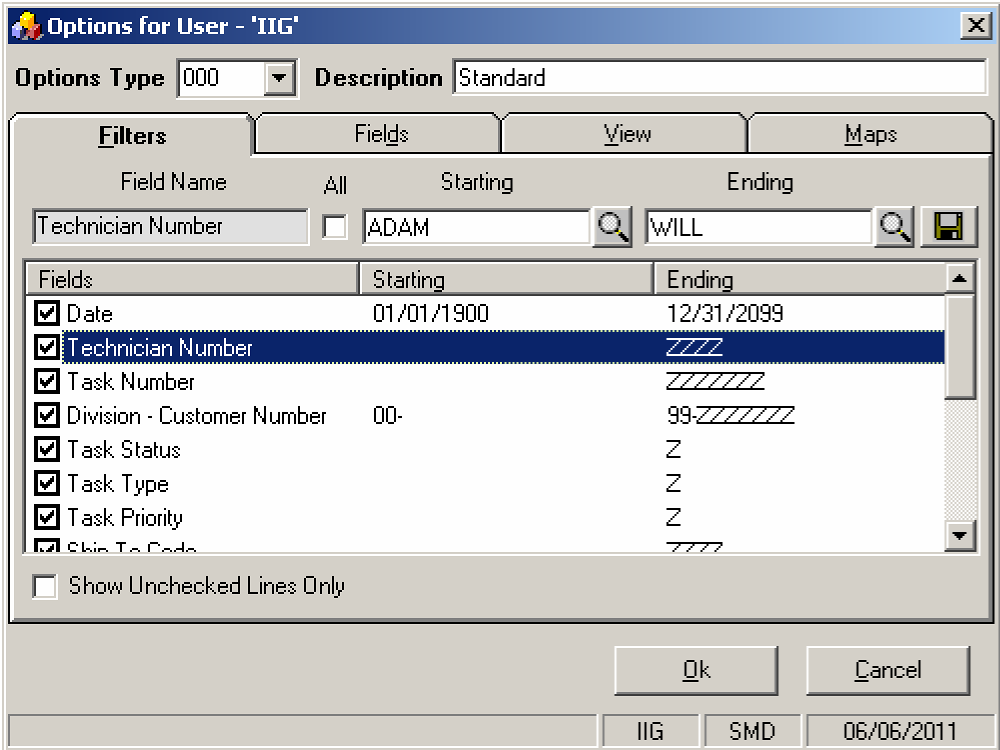


You can select a background color for **Past Due Tasks** cells. The cells representing dispatches with Ending Date earlier than current system date will be displayed with that color.

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).

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),



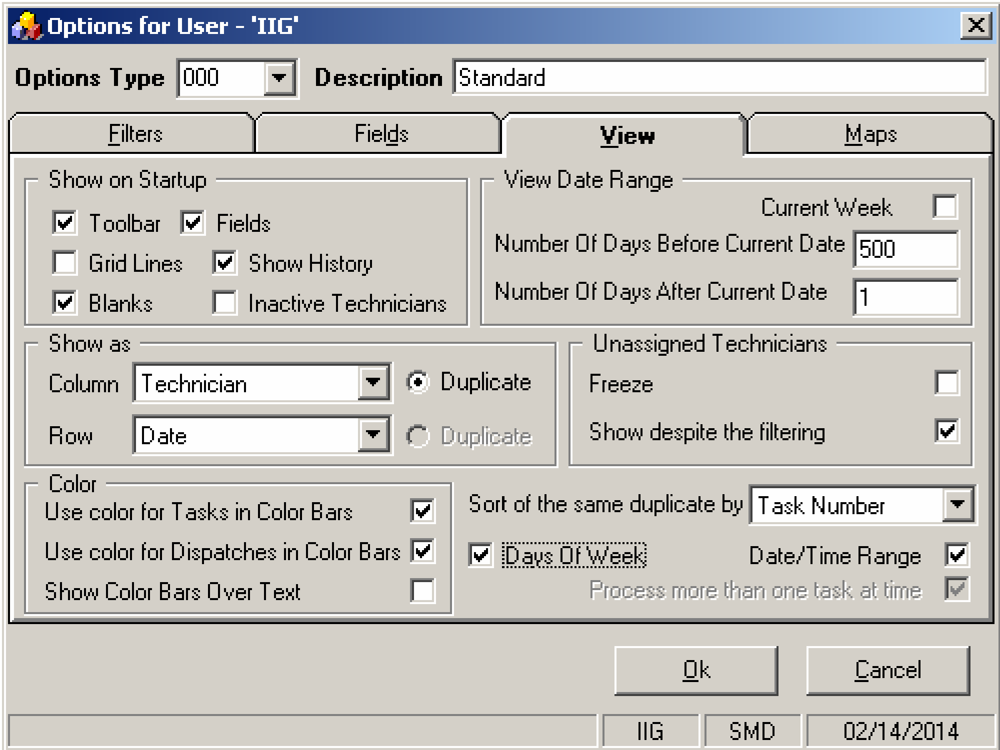
Enter the Starting and Ending **Technician Numbers** and click the **Save Change** icon to the right.

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 lines with limitations of range.

Go to the **View** tab.



Check the corresponding boxes in the **Show on Startup** section to show **Toolbar, Grid Lines, Fields, Blanks, History, 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 so that the Closed tasks to be 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.

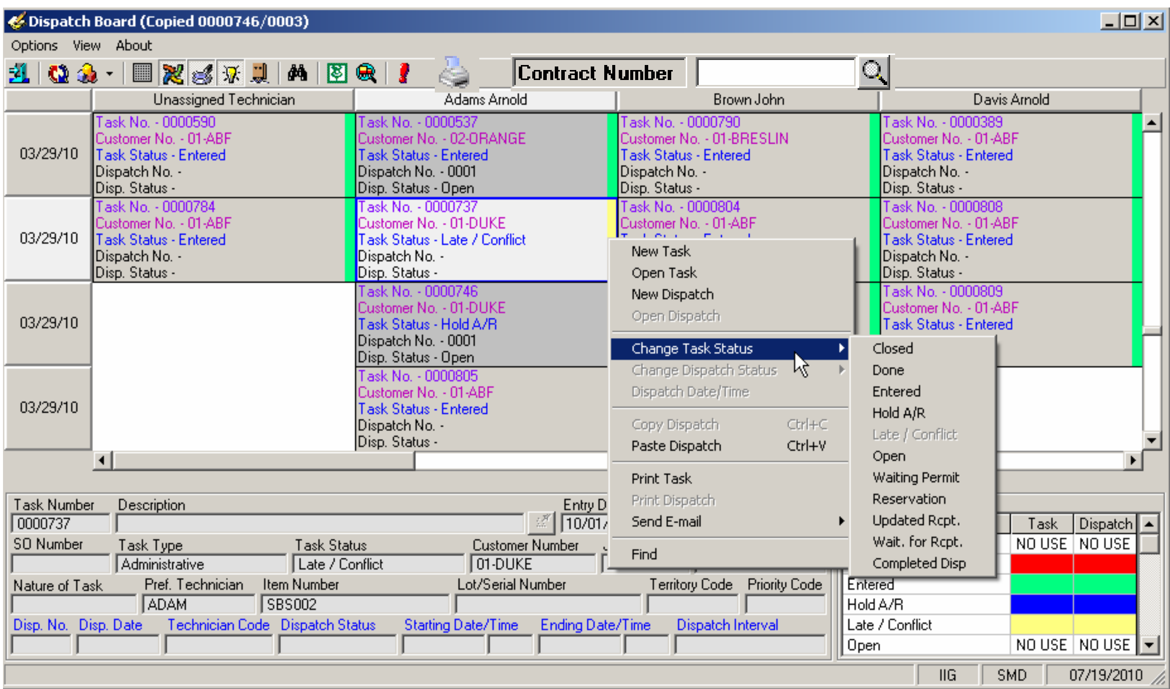
You can set the **Numbers Of Days Before** and **After Current Date**. This can be useful to locate tasks and dispatches more easily and also to shorten refresh time of the Board. If both are set to 0, all the Dates are displayed.

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.

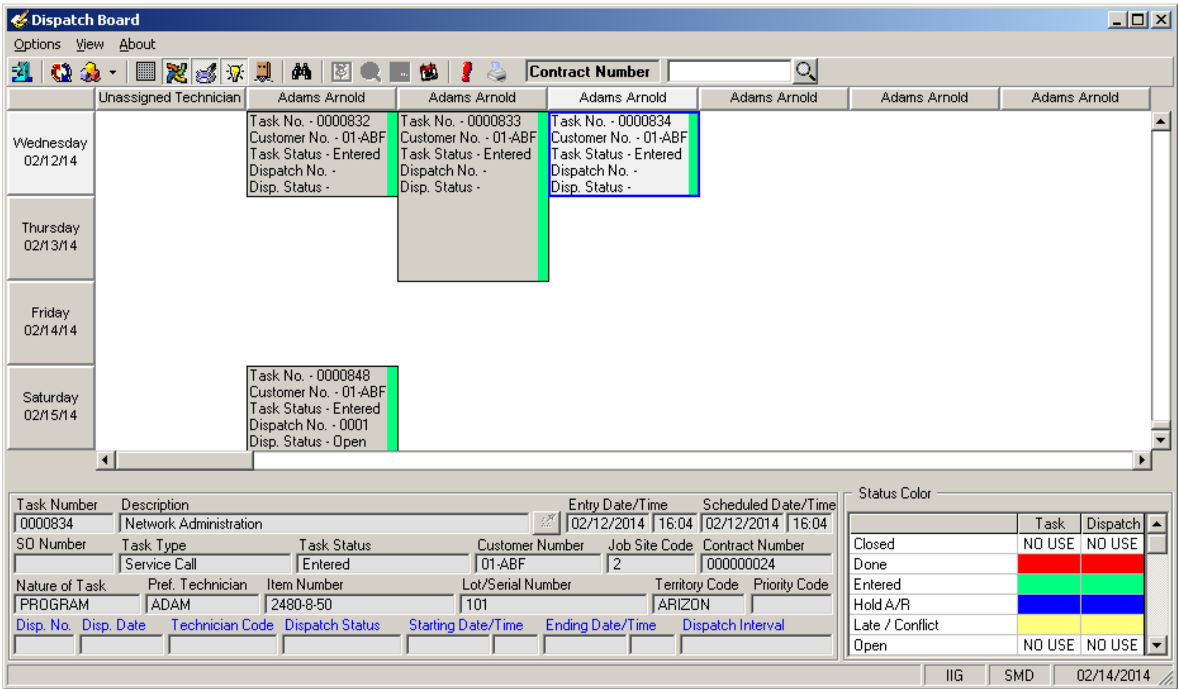


Changing the status of the task/dispatch will change also the colors.

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.

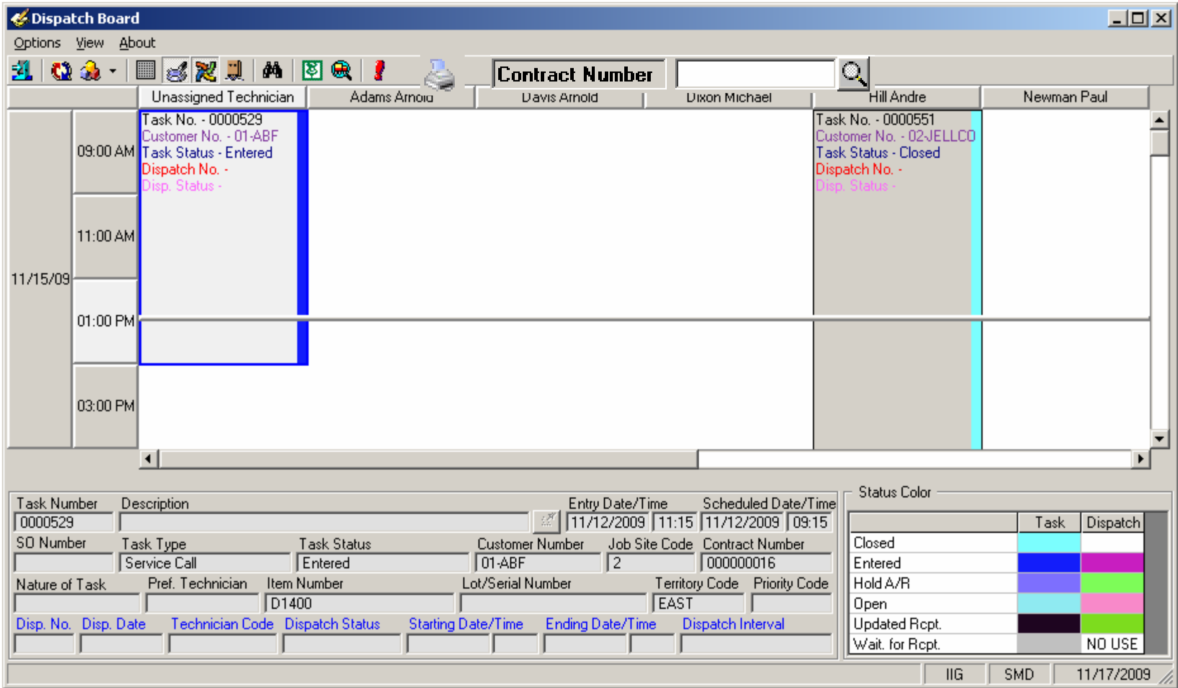
In the **Sort of the same duplicate by** field select the field (Task Number, Priority Code, Scheduled or Start Time, Scheduled Time, Dispatch Start Time) based on which sorting within the same duplicates (for instance, Technicians or Dates) should be done. But in some cases, in order to avoid using 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.



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.



The **Status Color** legend in the lower right hand corner next to the Task/Dispatch data displays the colors specified for corresponding Task/Dispatch statuses.

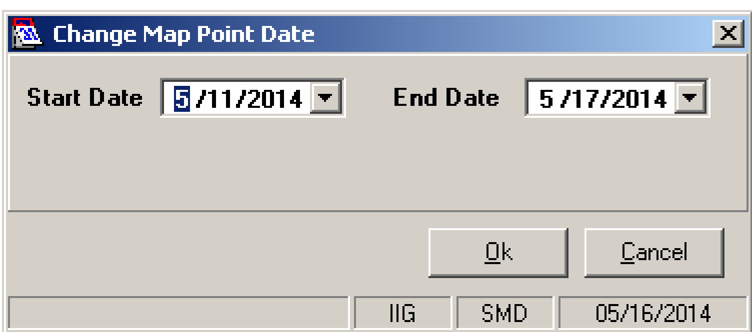
By default, the displayed fields, names, ranges and colors are saved for each user and each company separately under Options Type 000 Standard. You can create different views. Enter new **Options Type** and **Description**. Make your changes, and click **OK**. The view will be saved under current Options Type. Next time opening the dialog box you can select any of existing Options Types. Note that entering new Type code will clear all the settings to defaults.

Map Point-Dispatch Board

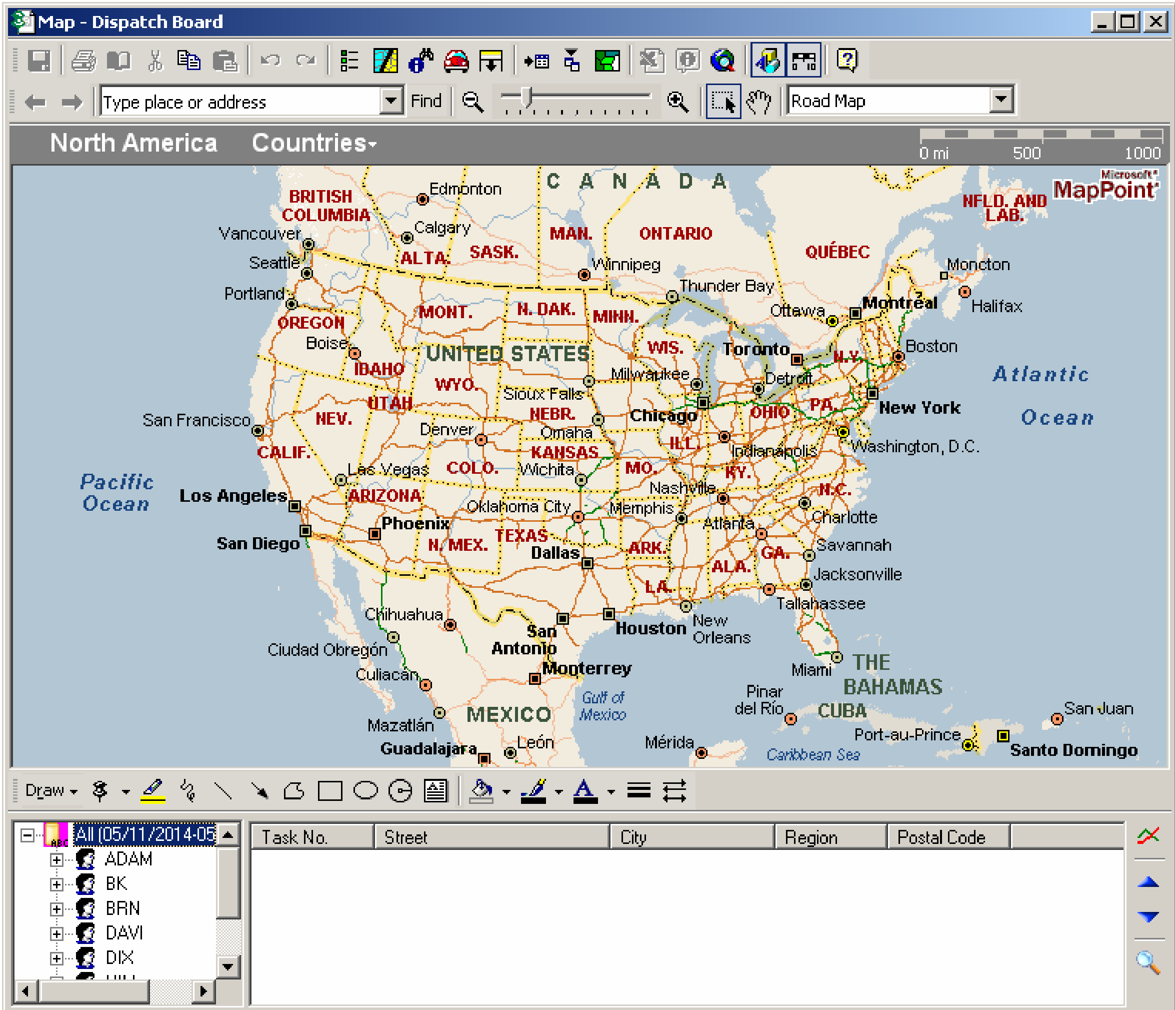
Note: In order to enable the Map Point button on the toolbar program, it is necessary to have IIG's SMM4.50 (Map Point for SMP) enhancement installed and enabled in the Dispatch Board Options.
It is necessary also to have the Route Track program installed, since vehicle and truck information set for each technician is taken from Route Track program database.

When trying to open the ***Map-Dispatch Board*** *program* without having installed Route Track program the following message is displayed:

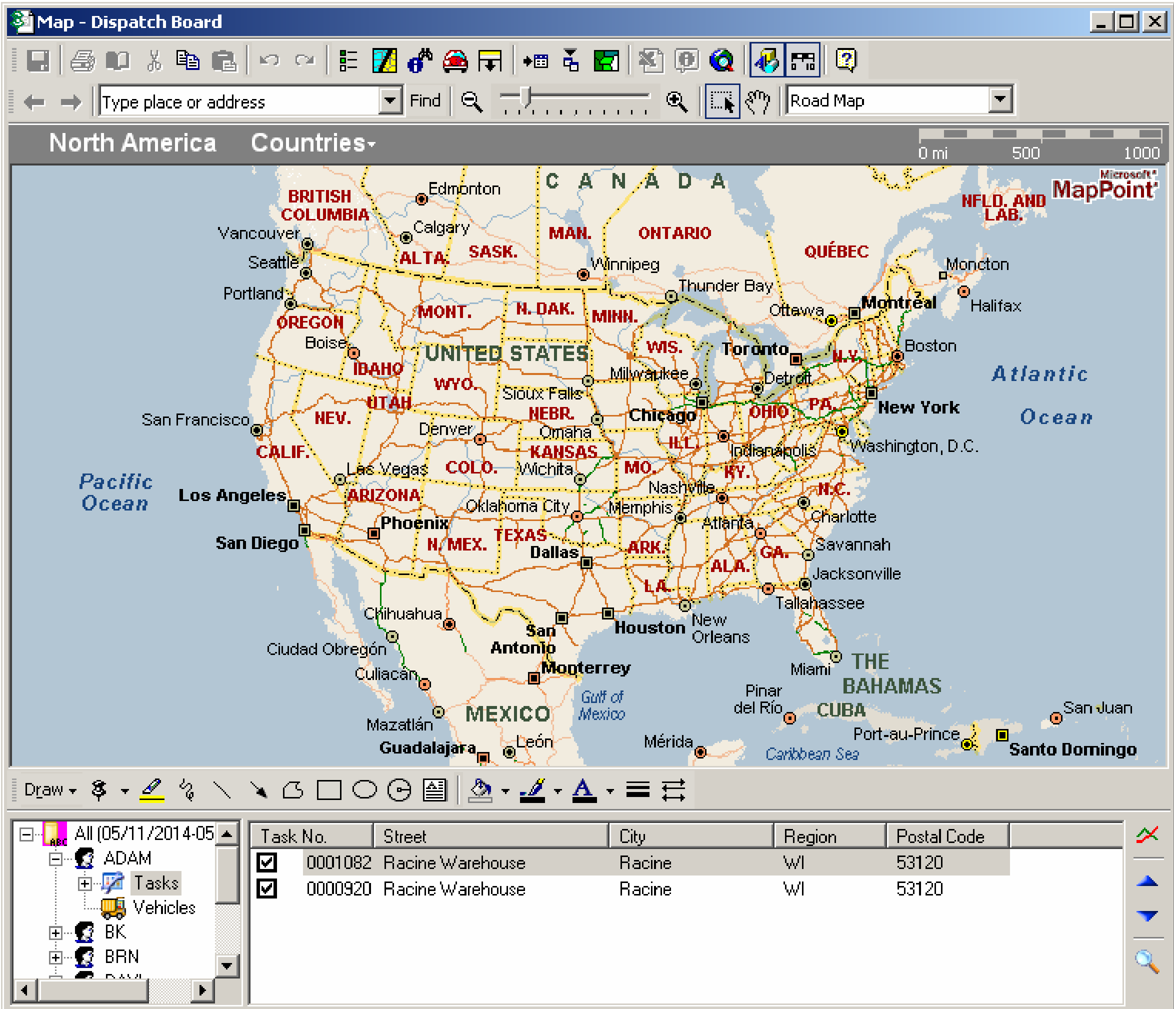
Upon pressing the Map Point button a screen isopened with Start and End Dates automatically set based on the Dispatch Board options.



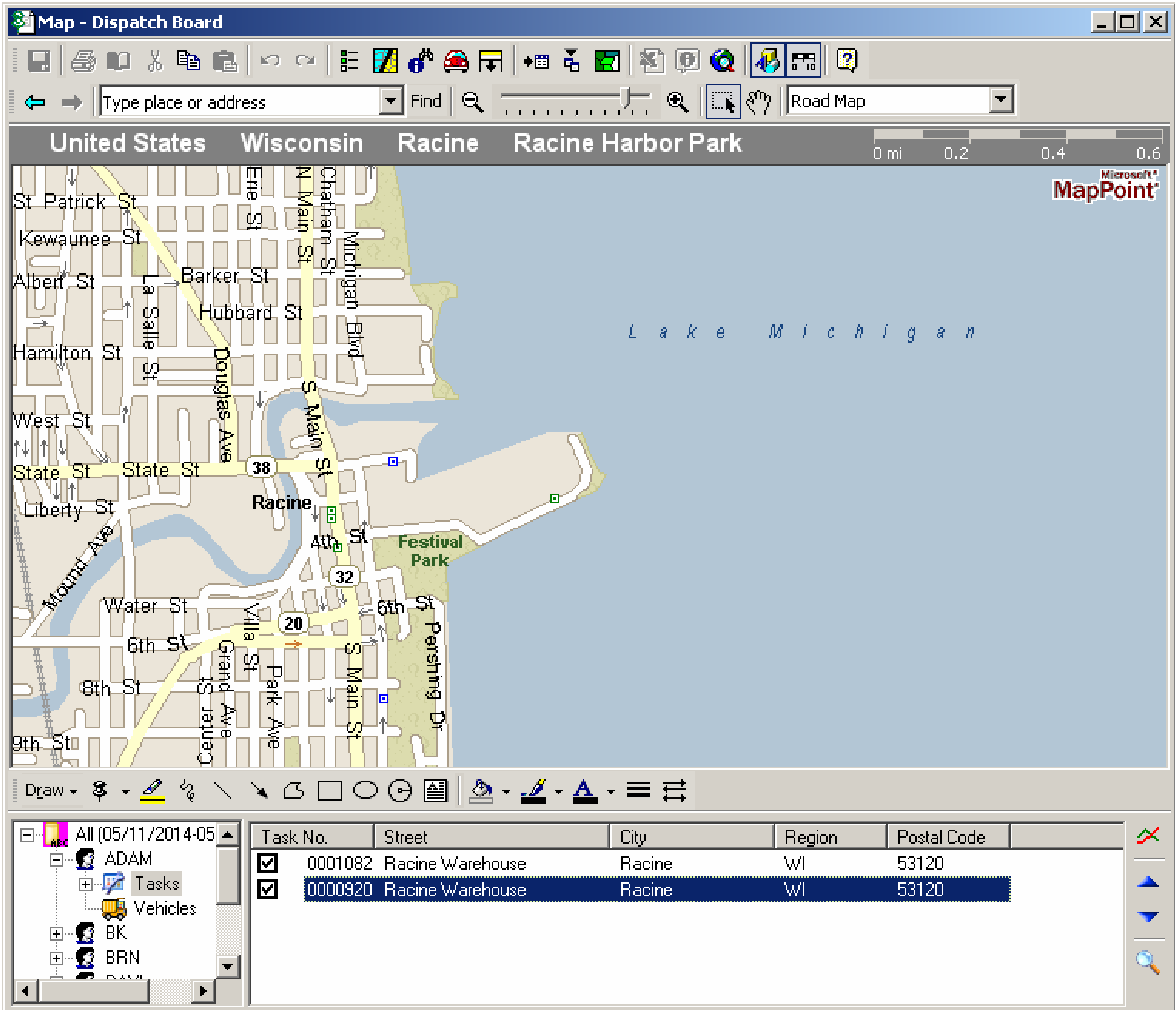
In the opened **Map-Dispatch Board**, at the bottom of the window, the tree-control on the left lists the **Technicians** displayed in the Board.


Map - Dispatch Board
Type place or address
Find
Road Map
North America
Countries
0 mi
500
1000
MapPoint
Pacific Ocean
Atlantic Ocean
CANADA
UNITED STATES
MEXICO
Gulf of Mexico
Caribbean Sea
Draw
All (05/11/2014-05
ADAM
BK
BRN
DAVI
DIX
Task No.
Street
City
Region
Postal Code

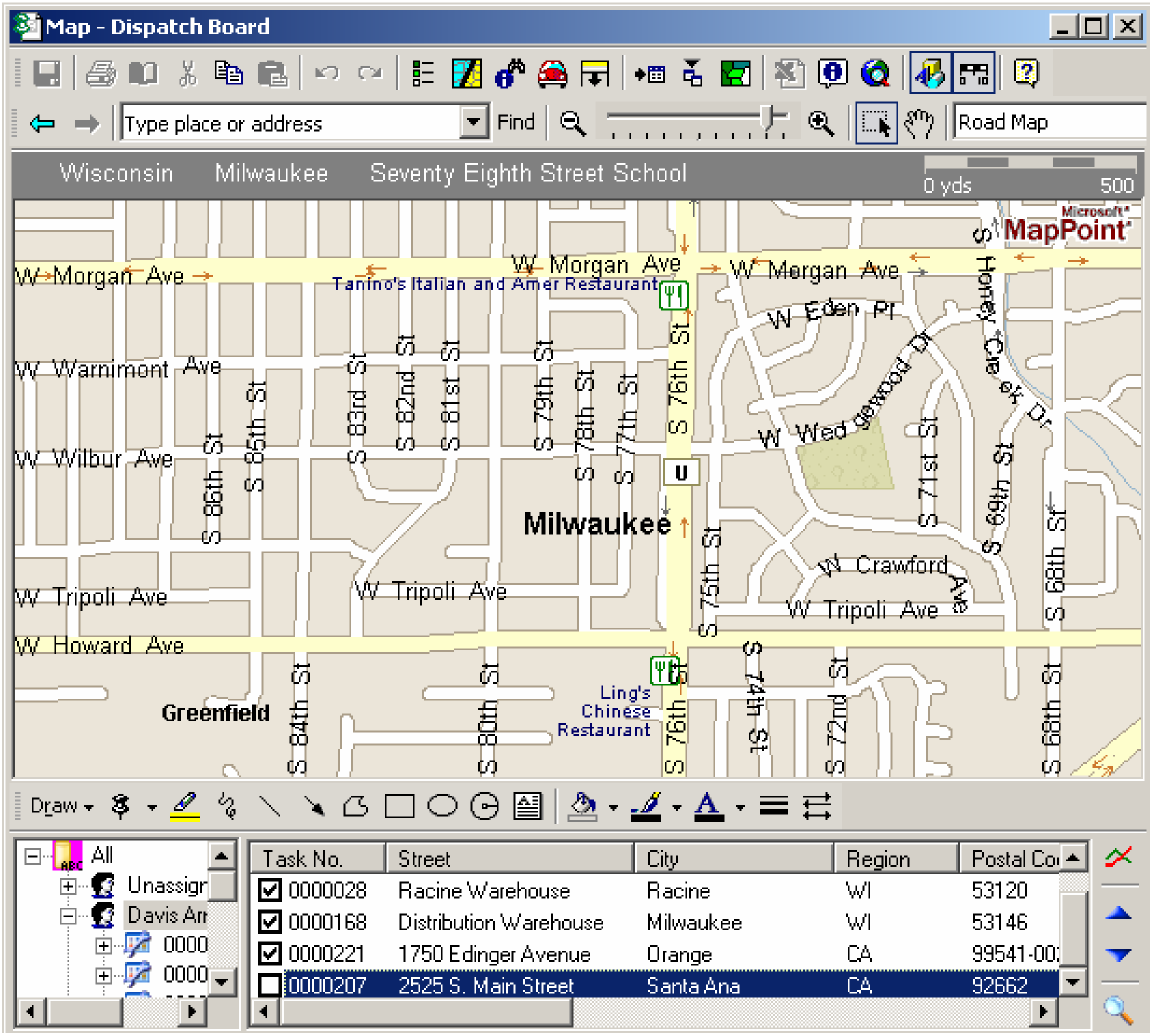
When clicking a **Technician,** the Tasks assigned to that technician, which Schedule Date falls in the selected Date ranges, are displayed on the right (as it is on the Board):



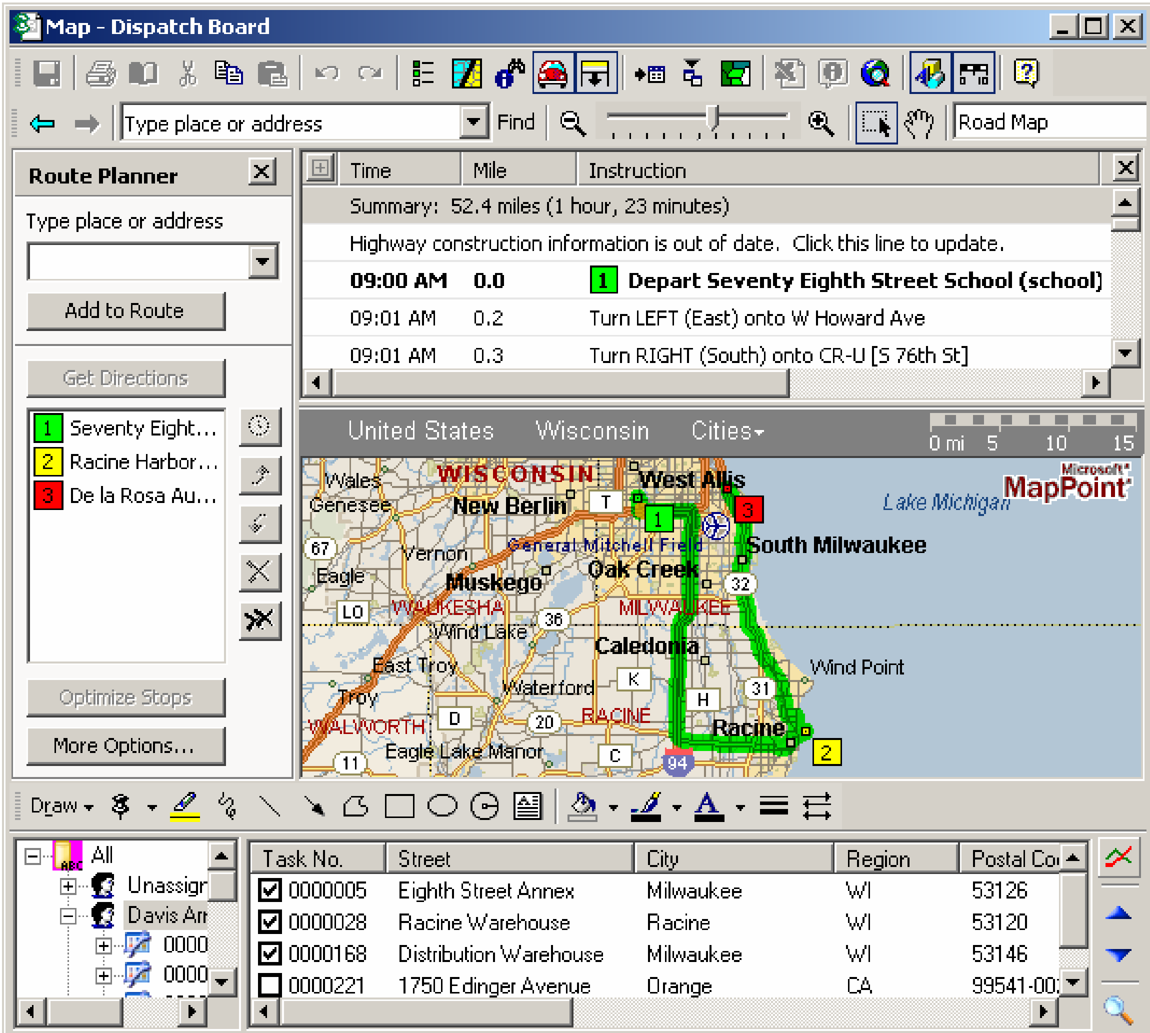
When selecting a task from the list, City map of the region is displayed.



If the program cannot find the place on the map, the checkmark is removed from that row:



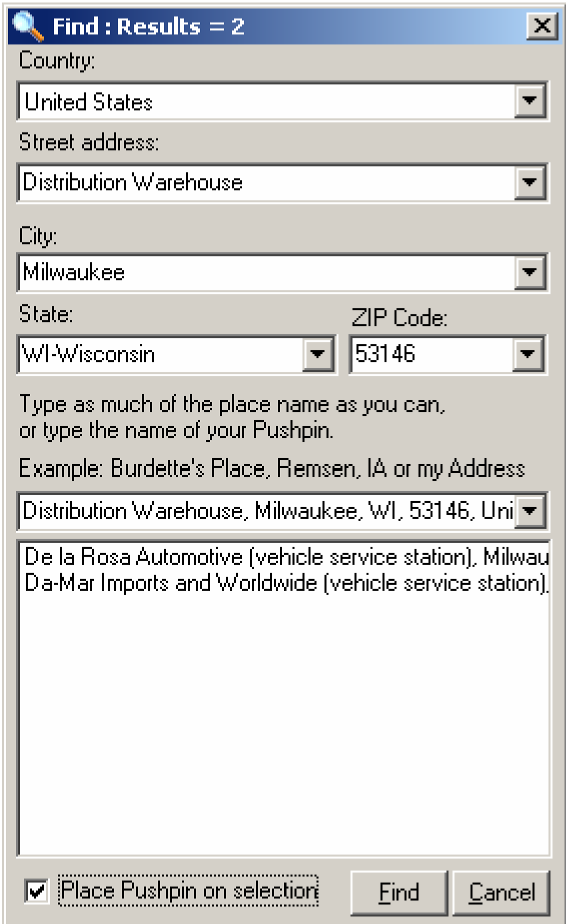
The **Calculate** button can be used for route calculation.



The route is calculated for the tasks with checkmarks, and displayed on the map and in the summary.

The **arrows** in the right bottom of the window allow rearranging the rows order for more optimal route calculations.

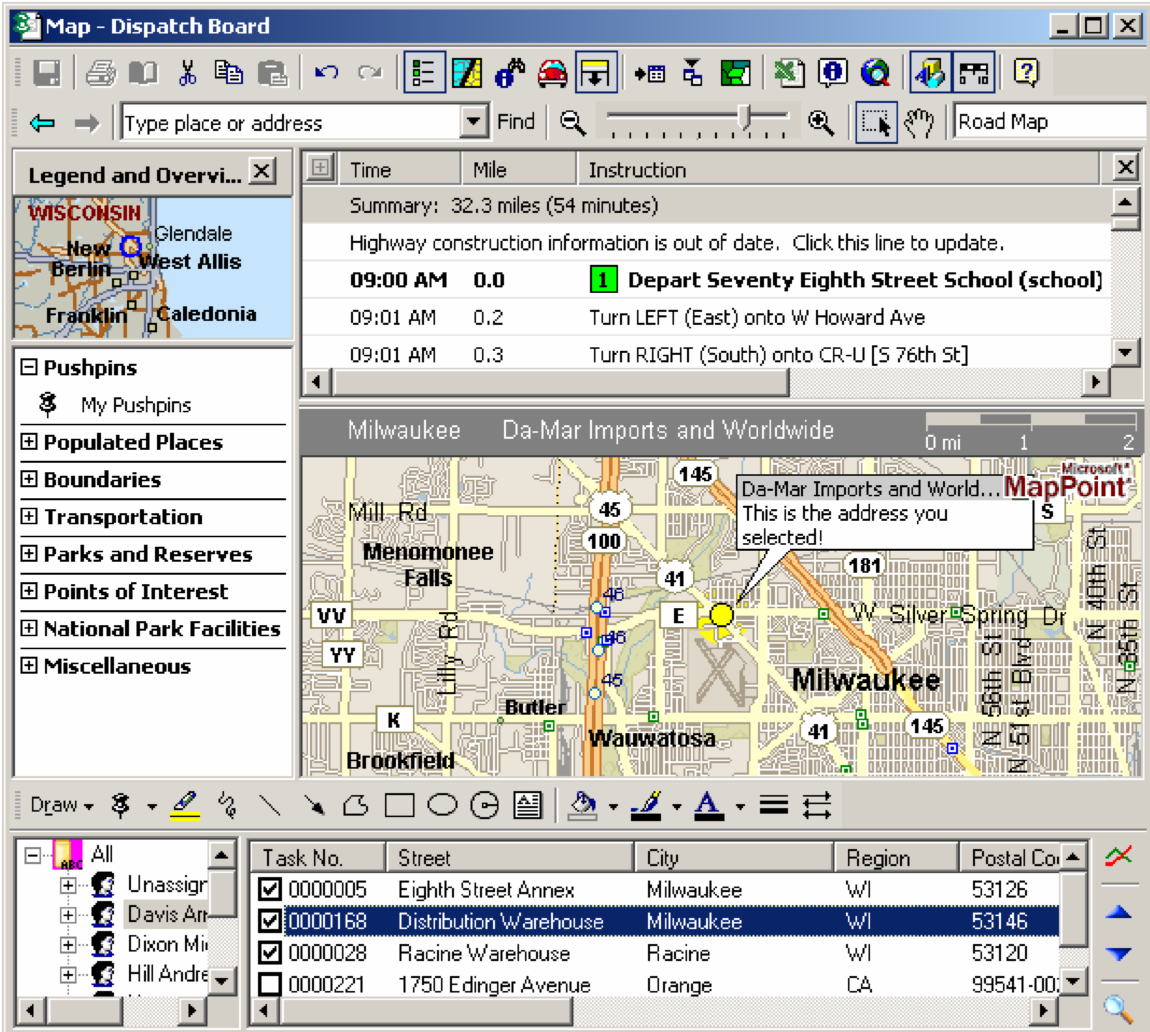
The **Find** button opens the **Find** window:

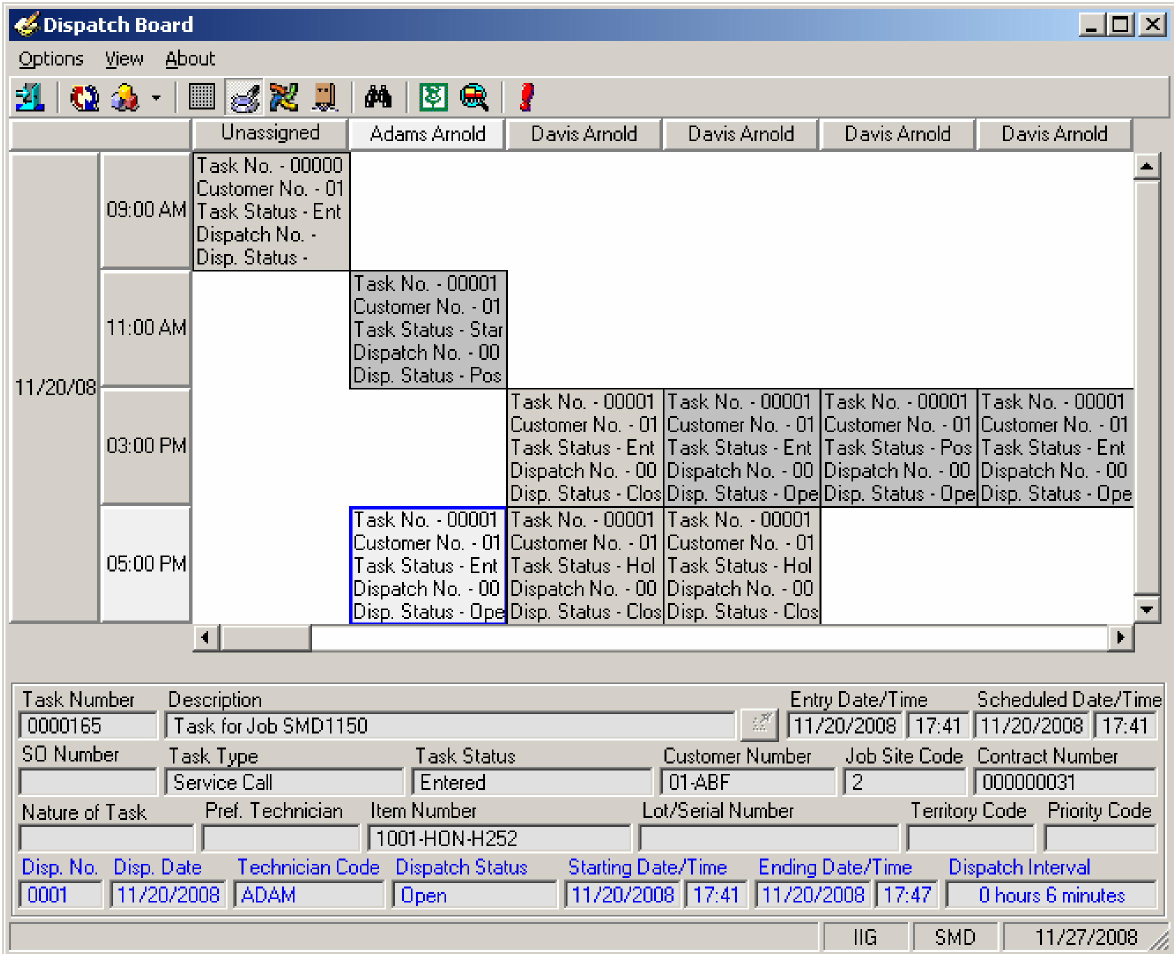


This window is always on-top.

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.


Map - Dispatch Board
Type place or address
Find
Road Map
Legend and Overvi...
Pushpins
My Pushpins
Populated Places
Boundaries
Transportation
Parks and Reserves
Points of Interest
National Park Facilities
Miscellaneous
Time
Mile
Instruction
Summary: 32.3 miles (54 minutes)
Highway construction information is out of date. Click this line to update.
09:00 AM 0.0 1 Depart Seventy Eighth Street School (school)
09:01 AM 0.2 Turn LEFT (East) onto W Howard Ave
09:01 AM 0.3 Turn RIGHT (South) onto CR-U [S 76th St]
Milwaukee Da-Mar Imports and Worldwide
Da-Mar Imports and World...
This is the address you selected!
Draw
All
Task No.
Street
City
Region
Postal Co
0000005 Eighth Street Annex Milwaukee WI 53126
0000168 Distribution Warehouse Milwaukee WI 53146
0000028 Racine Warehouse Racine WI 53120
0000221 1750 Edinger Avenue Orange CA 99541-00



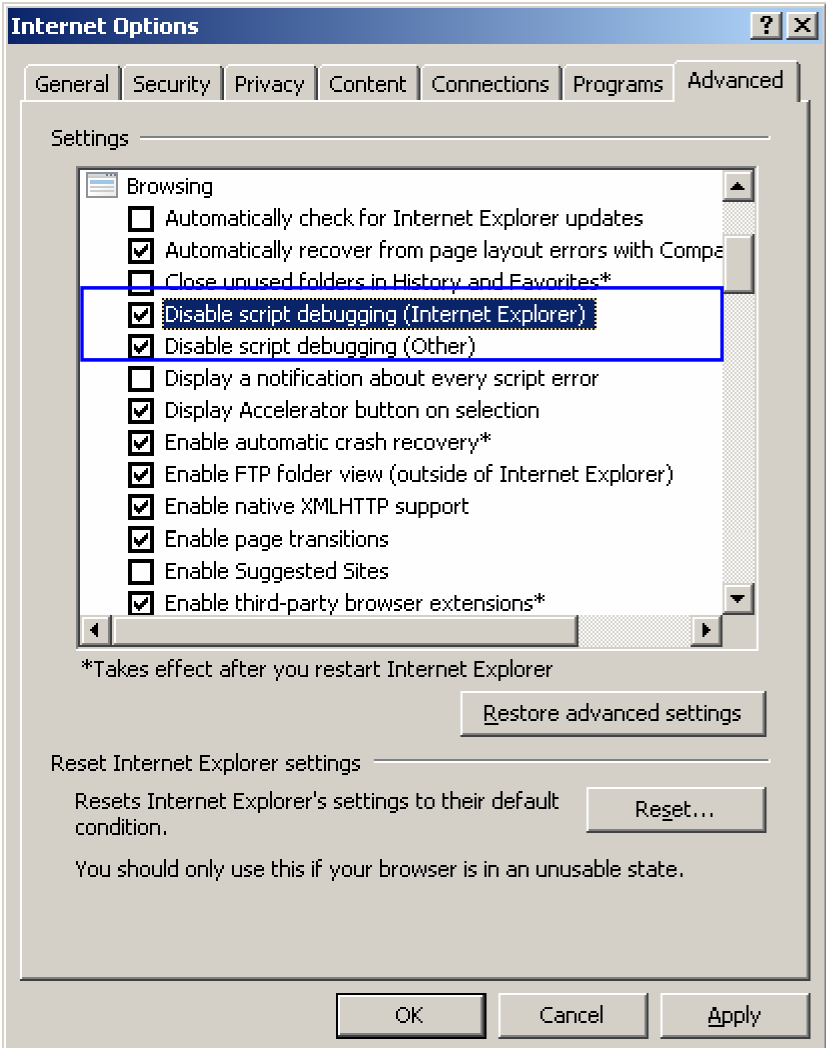
The **Route Track** button launches the Route Track program.

Map Quest- Dispatch Board

This enhancement provides integration with Map Quest allowing the users to see on a US map the tasks displayed on a dispatch board view. It provides also:

- Getting directions (fastest, shortest, optimal) from one location to the next
- Assigning the task to a technician by viewing all technicians and their tasks on the map board

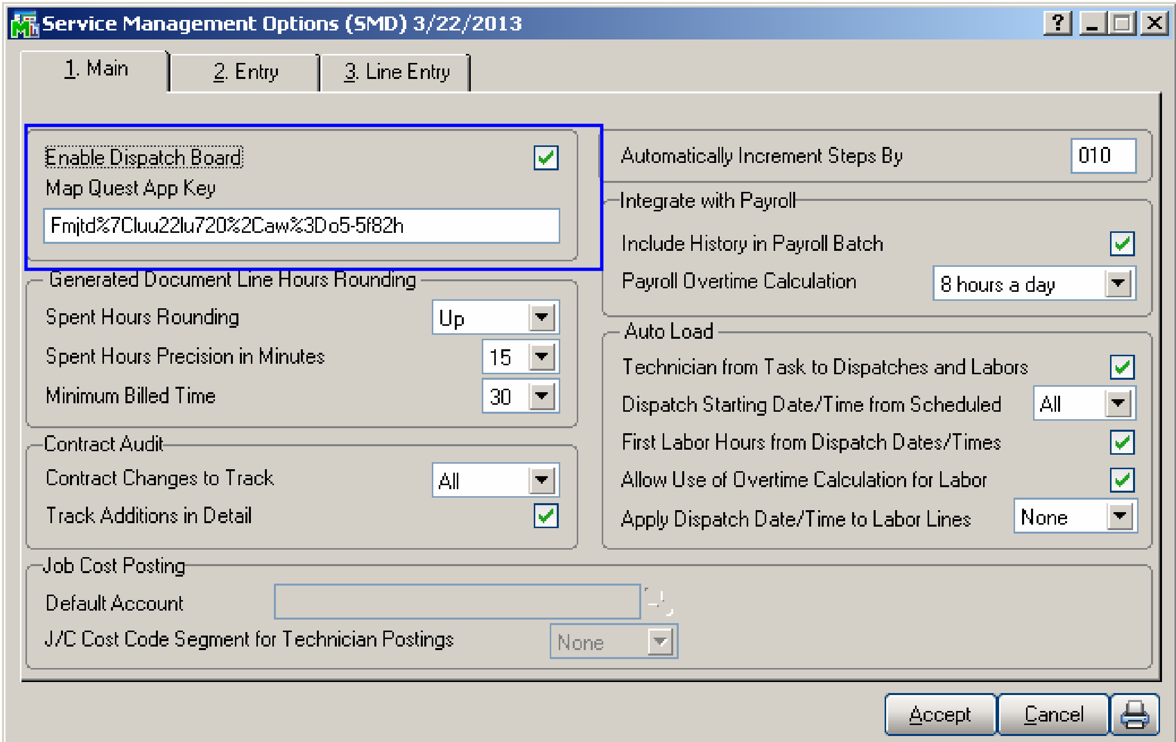
Important Note*: In order to have* ***Map Quest_ Dispatch Board*** *to work properly it is necessary to have Windows Internet Explorer 8 installed and configured as follows:*



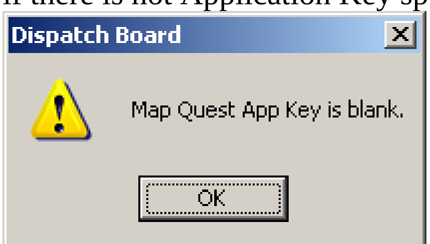
Service Management Options

Before starting to use Map Quest in the Dispatch Board it is necessary to register at the: http://developer.mapquest.com/ and get the Application Key.

The **Dispatch Board Map Quest App Key** field has been added to **Service Management Options -> Main** tab to allow entering the Application Key provided by Map Quest.



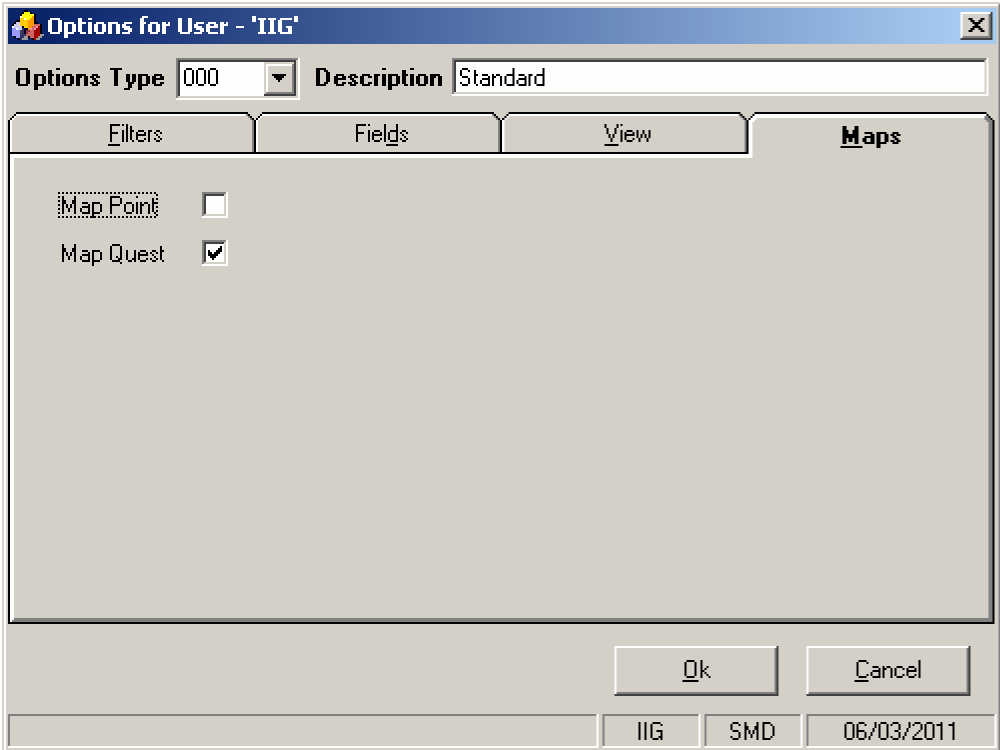
The following message will appear when trying to launch Map Quest from Dispatch Board if there is not Application Key specified in the S/M Options.



In case the Application Key entered in the S/M Options is not valid no maps will be available in the **Map_Dispatch Board** screen.

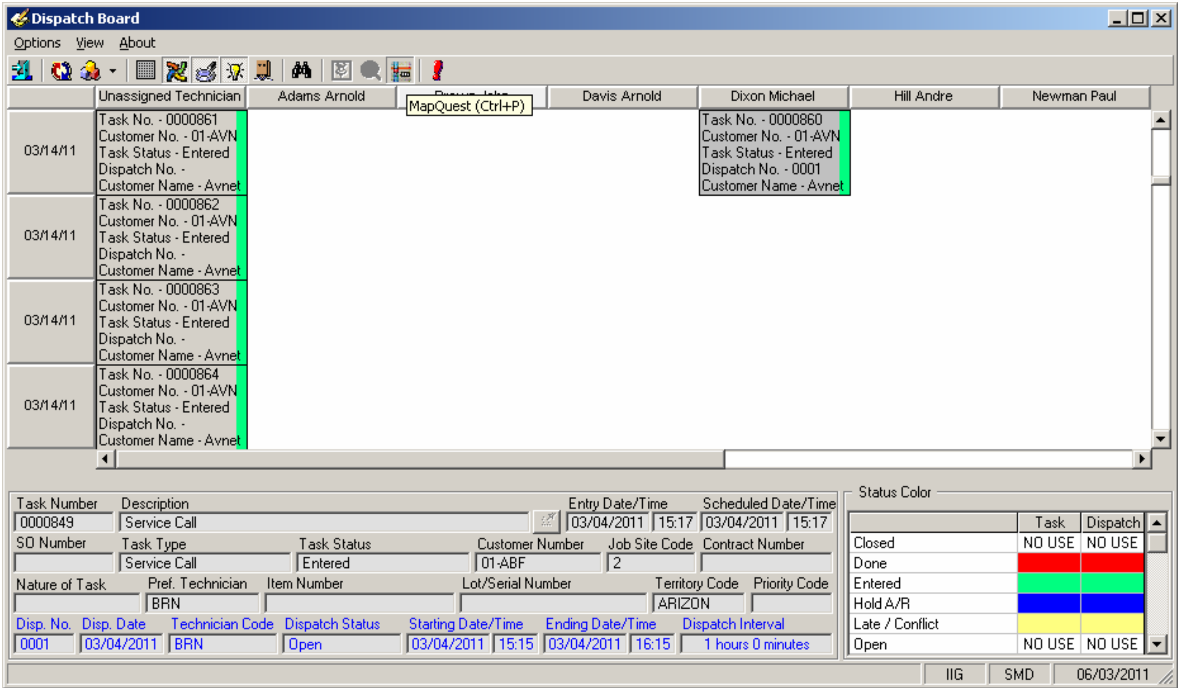
Map Quest-Dispatch Board

A new **Maps** tab with two options: **Map Point** and **Map Quest**, has been added to the Dispatch Board Options screen to allow selecting the Maps to work integrated with Dispatch Board.

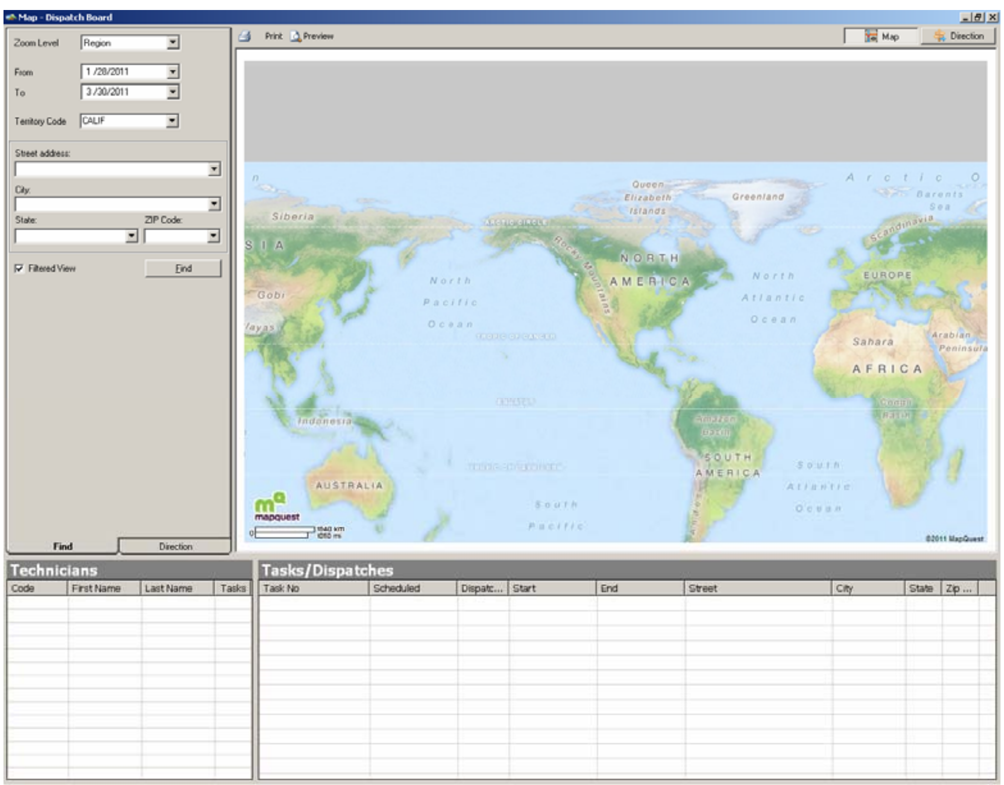


Select the **Map Quest** checkbox to enable Map Quest for Dispatch Board.
The Dispatch Board integration with Map Quest allows the users to enter a region, specify date range and display on the map- board the technicians in the filtered region for the specified date(s).

Note: Refer to p. 94 of SMP450.pdf for information about Map Point integration.



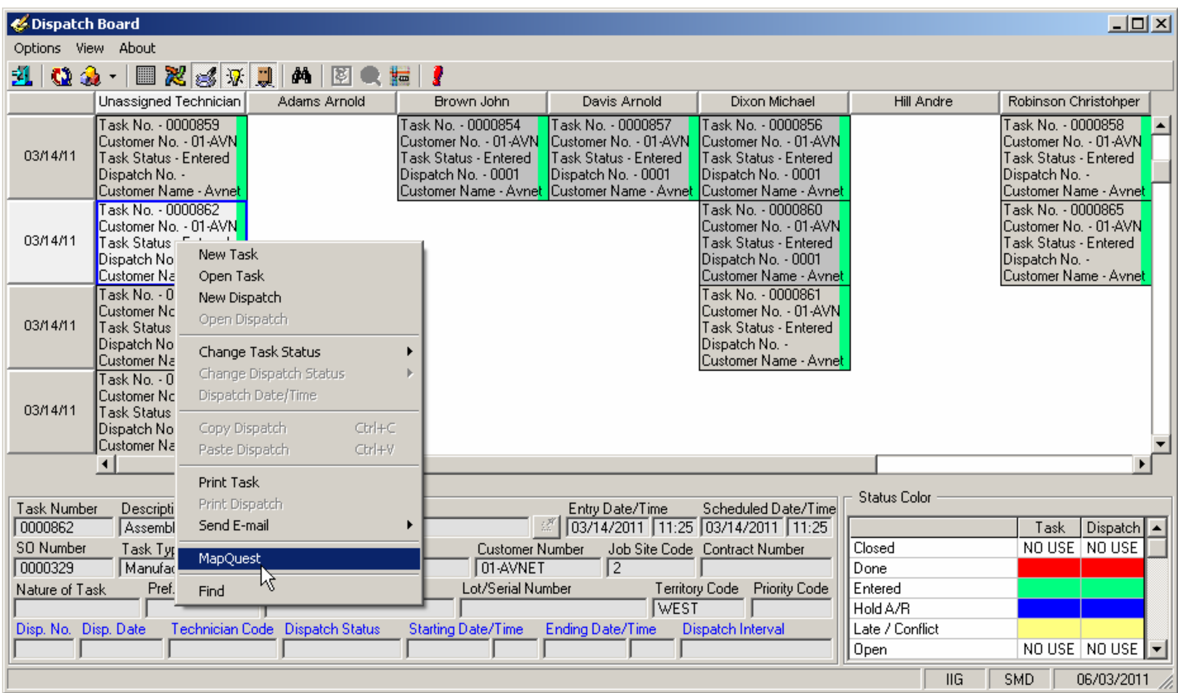
Click the **Map Quest** button added to the Dispatch Board toolbar to open the **Map – Dispatch Board** screen.



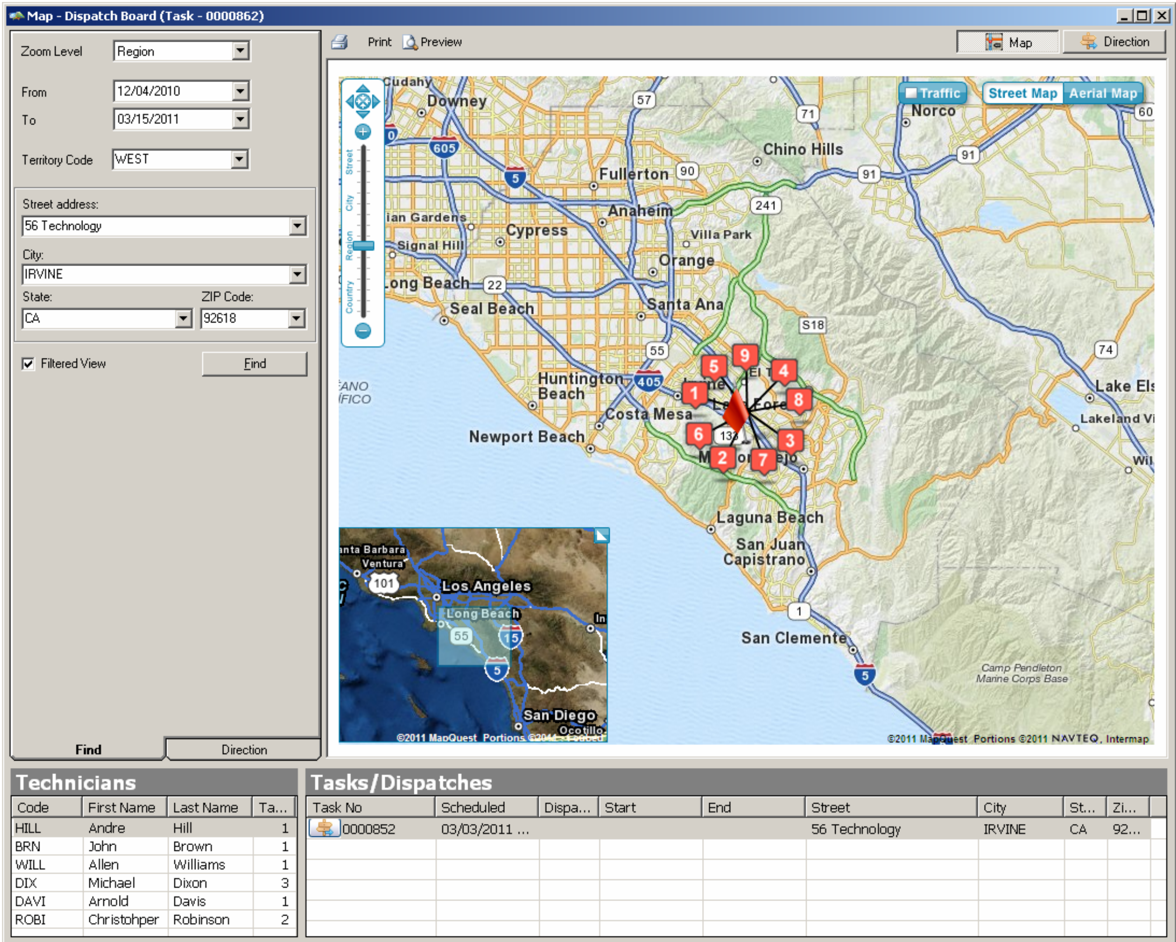
The **Filtered View** checkbox is selected by default. It allows applying the filters set in the Dispatch Board options. Only the Date filters are not taken into account. The **From** and **To Dates** on the **Map-Dispatch Board** screen are populated with corresponding Dates based on the current system date taking into account the **Number of Days before Current Date** and **Number of Days after Current Date** values set in the Board options for current view.

On the **Map – Dispatch Board** screen enter the address information and the Territory Code to be searched. Click the **Find** button to find the Technicians having open tasks assigned to that Territory. Each Task will be displayed as an individual Point on the Map. Select a Technician to have the Technician's Task/Dispatches loaded in the Tasks/Dispatches grid.

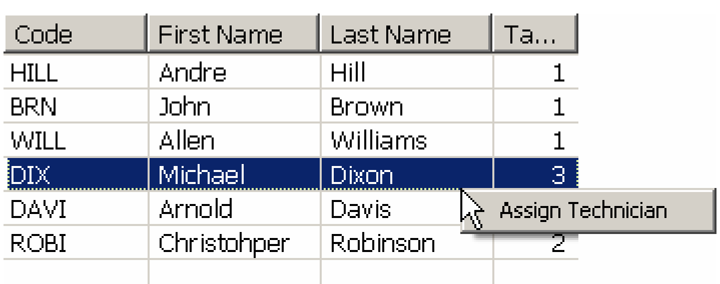
The Map-Dispatch Board can be launched also from the Pop Up menu opened by right clicking on the task cell.
When the Map-Dispatch Board is opened from the Task the Job Site Code address information from the Task's More Info screen is automatically loaded into the respective address fields on the Map-Dispatch Board:



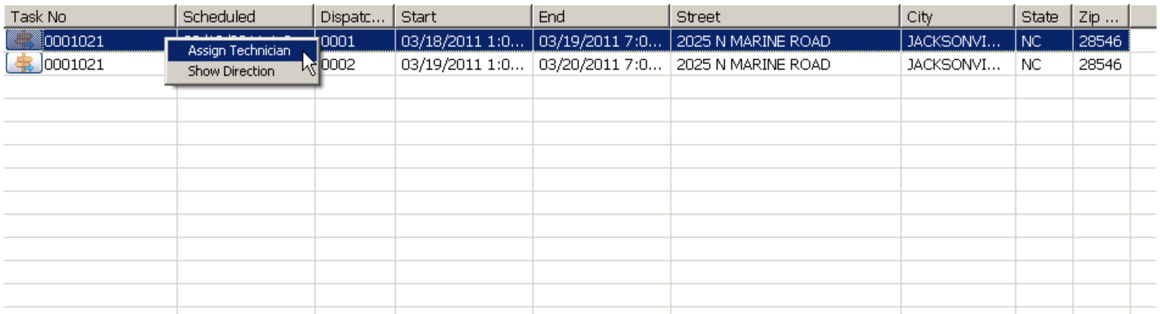
In this case the From and To Dates are populated with corresponding values based on the Task's Scheduled Date or the Dispatch Starting and Ending Dates.



The Map is opened with the Ship To addresses already found and flagged.

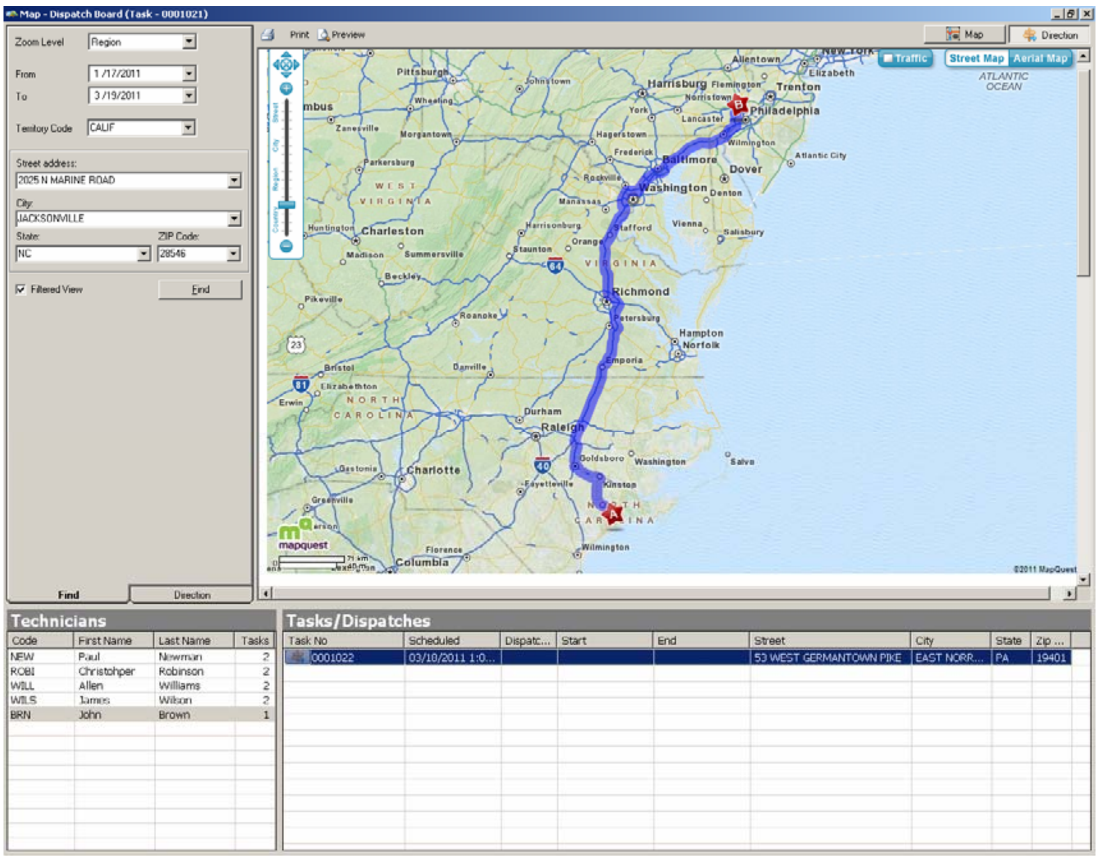


There is an option for assigning Technician to the Task and Showing the Direction to the required address.
Just right click in a row of Task/Dispatch grid and select Assign Technician to have the Technician selected in the Technicians list (on the left) assigned to current Task.

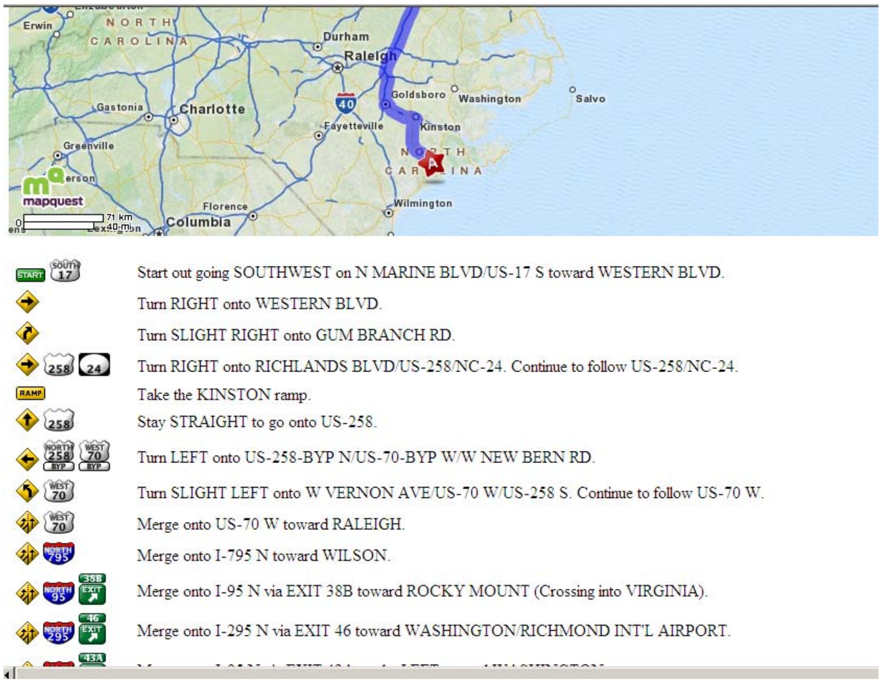


Select **Show Direction** to have the direction to the required address highlighted on the map. Pin **B** indicates the Ship To address of the selected Task and Pin **A** is the required address.

The direction may be viewed also by clicking the button on the left of the Task number.



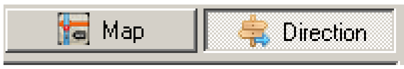
Scroll down to read detail directions:



Map-Quest provides additional options for directions.
The Directions are shown based on the Route Type selected in the Directions screen.

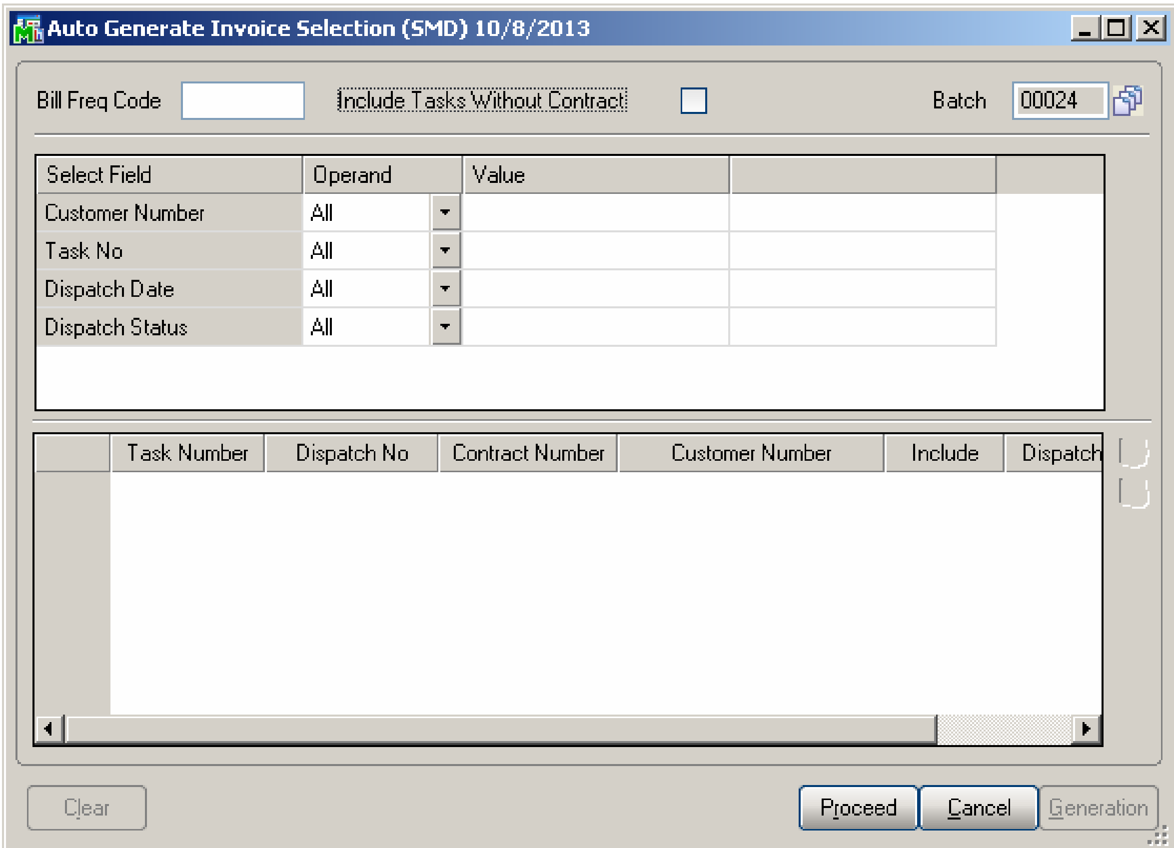
The Print and Preview buttons allow the user to Print/Preview current view of Map Dispatch Board.

The Map and Direction buttons allow for switching between the Map and Direction screens.



Auto Generate Invoice Selection

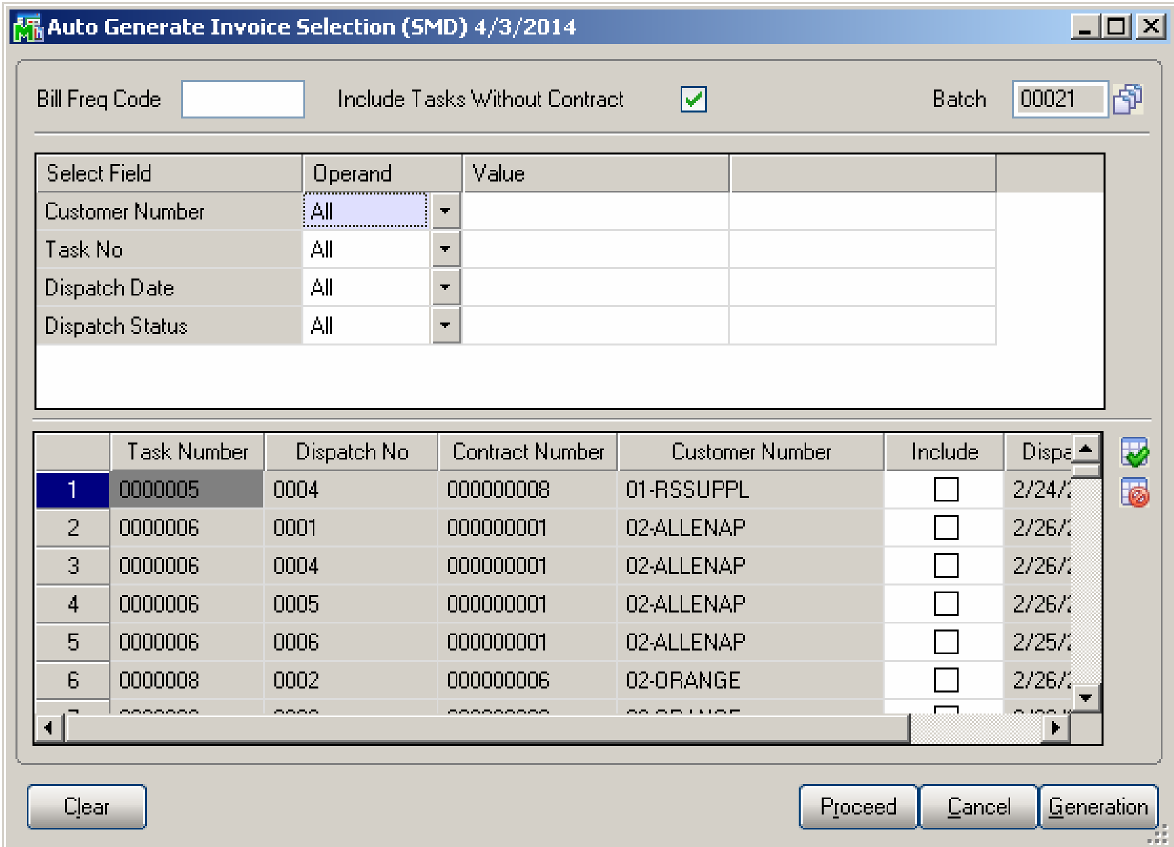
The **Auto Invoice Generation** program can be used to easily create Invoices with automatic generation.



You can choose to process all the customers and contracts or select only those with numbers falling into the range set by starting and ending. Also you can select dispatches by date and status, by Bill Frequency Code of the Task and Bill Type.

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 display the list of dispatches matching the selection criteria. The Proceed button adds newly selected dispatches to the list of already selected ones.



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.

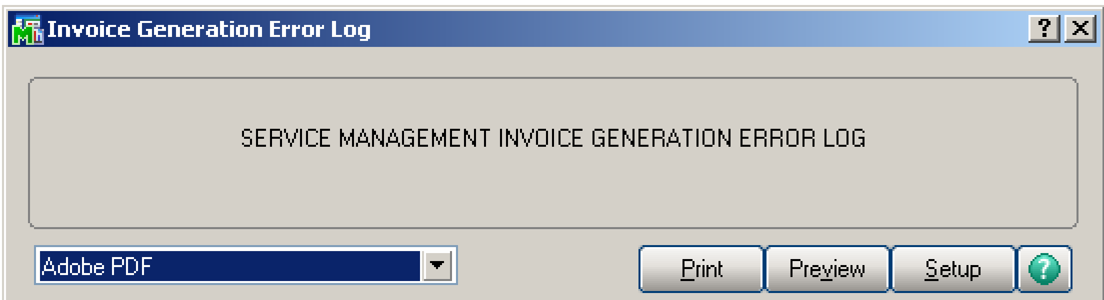
Place or remove checkmarks in the **Include** column of the list. Auto generation will generate invoices only for the dispatches marked as “Include”. Use the Select All or Deselect All buttons to select/deselect all the dispatches loaded in the grid at once.

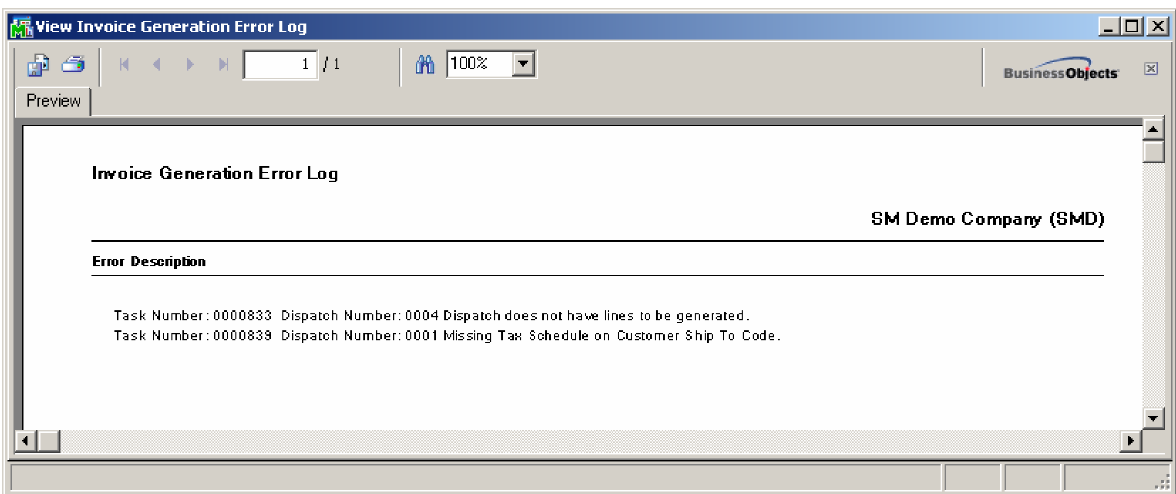
To start generating invoices, click the **Generation** button.

For the Fixed Upon Complete, Fixed Percent Complete and Fixed On Going billing types, amount of the invoice is calculated from the contract total amount taking into account already paid invoices. For Fixed Percent Complete type, this is done by percents of completion. You should enter the percent of completion in the **(%)** column if the Billing Type is For Fixed Percent Complete. Invoices will be generated for the contracts, which Percent Complete has been changed since the last invoice generation. For these three Billing Types, Special item will be added to the generated invoice, to balance the Invoice Total against the contract’s total amount (percent of it, if Fixed Percent Complete).

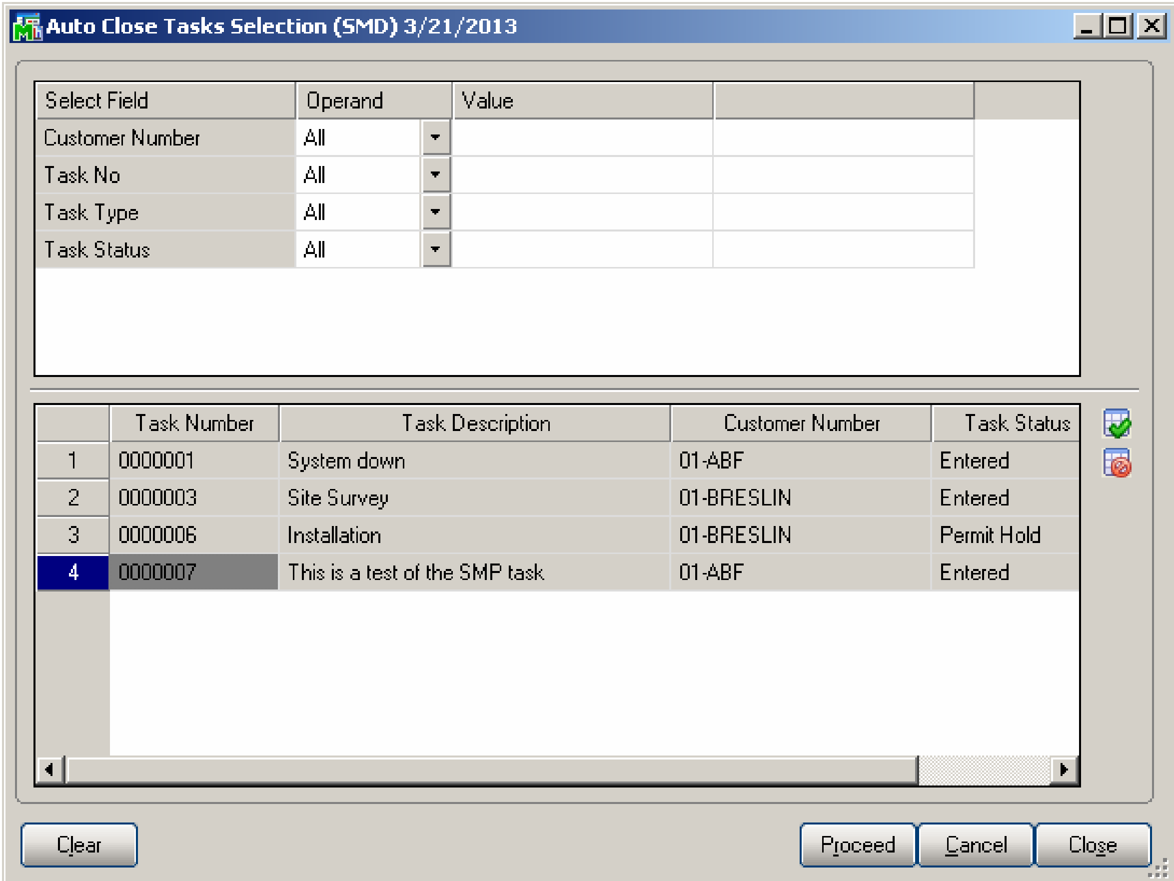
If the contract has a task generated from a Sales Order with deposit, separate invoice will be generated for that Sales Order, irrespective of the Separate Invoice option for its tasks. The total amount of the generated invoice will be subtracted from the sales order deposit. If the invoice is deleted, the deposit of the sales order will be restored.

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.



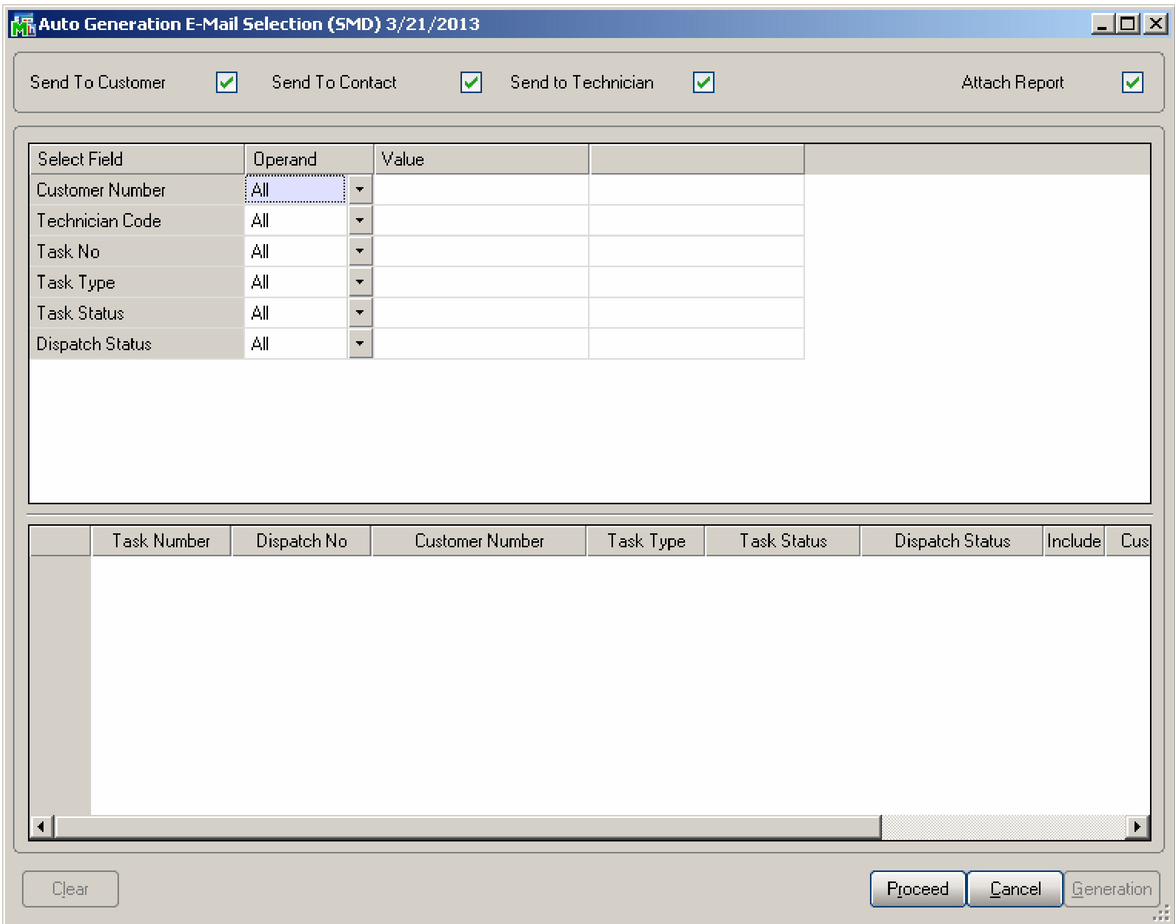


After Invoice generation is completed the Auto Close Tasks Selection screen is popup allowing the user to close also the Tasks if needed.


Auto Close Tasks Selection (SMD) 3/21/2013
Select Field
Operand
Value
Customer Number
All
Task No
All
Task Type
All
Task Status
All
Task Number
Task Description
Customer Number
Task Status
1
0000001
System down
01-ABF
Entered
2
0000003
Site Survey
01-BRESLIN
Entered
3
0000006
Installation
01-BRESLIN
Permit Hold
4
0000007
This is a test of the SMP task
01-ABF
Entered
Clear
Proceed
Cancel
Close

Auto Generate e-Mail Selection

The **Auto E-mail Generation** program can be used to create and send emails easily to whom it may refer with the copy of the Task report attached.



You can choose to process all the customers, technicians and tasks or select only those with codes falling into the range set by starting and ending. Also you can select tasks and dispatches by Type and Status.

You can send emails to Contacts, Customers and Technicians.

Check the **Attach Report** box to send Task report (in a PDF format) attached to the emails.

Enter the E-mail addresses of Customers, Contacts, and Technicians in the corresponding columns.

The **Proceed** button adds newly selected dispatches to the list of already selected ones.

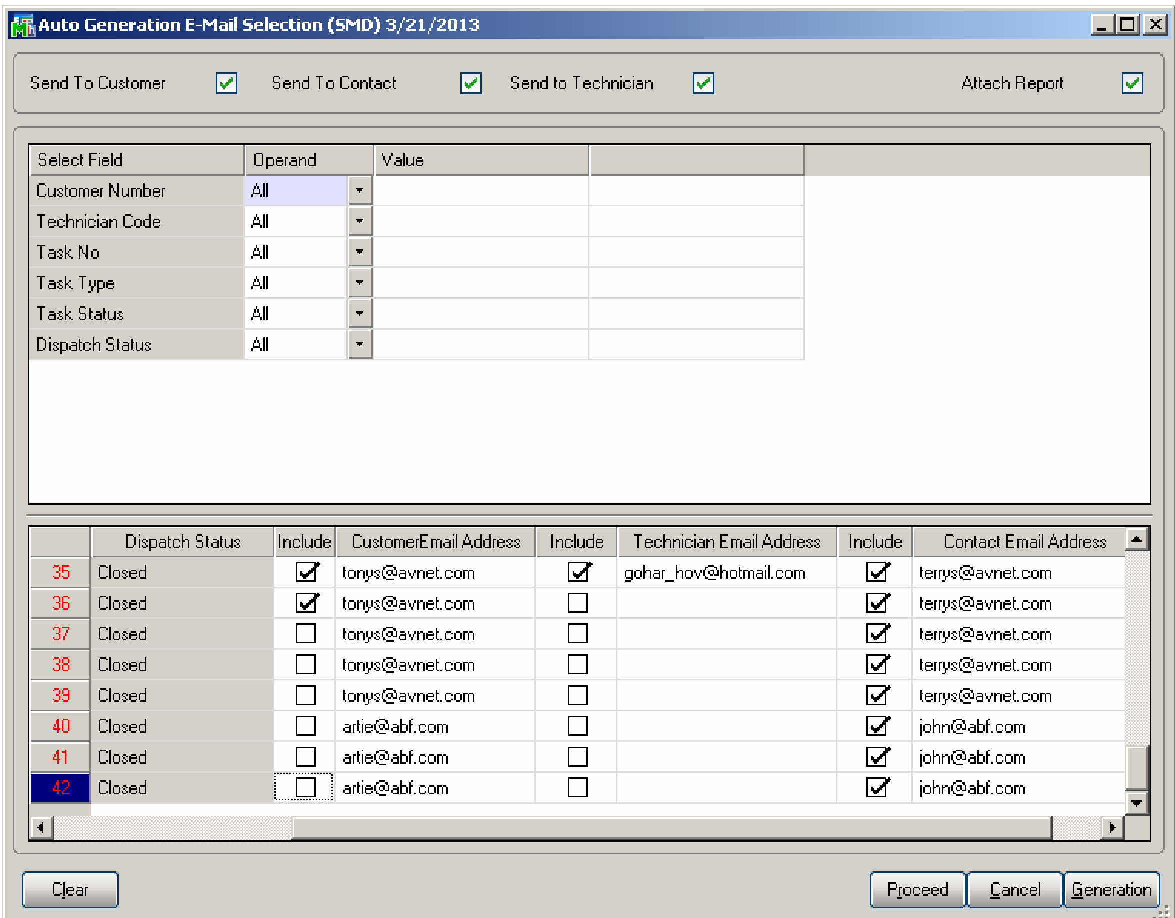
Click the **Clear** button, if you want to remove dispatches from the list according to the selections.

The **Cancel** button sets the selection criteria to defaults.

Place or remove checkmarks in the **Include** column of the list. Auto generation will generate e-mails only for checked dispatches.

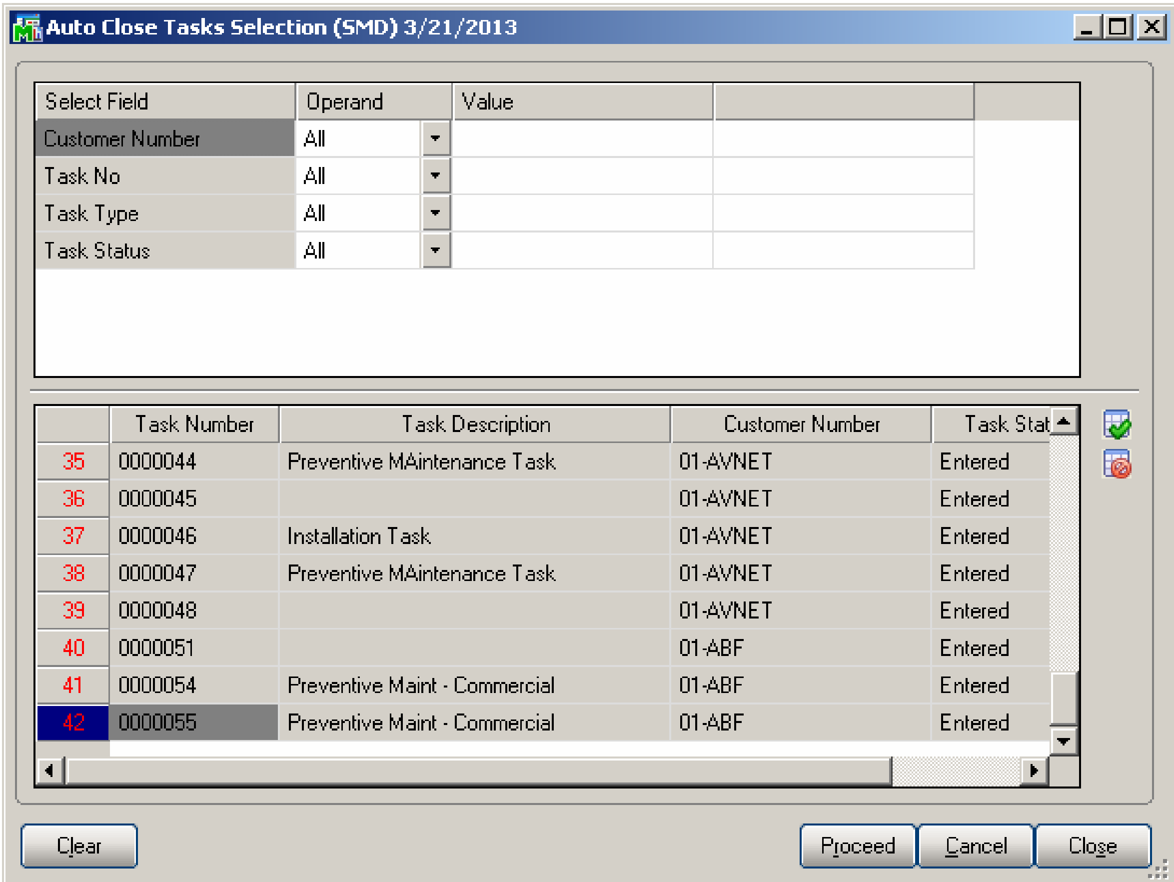
To start generating emails, click the **Generation** button.

After generating emails, corresponding lines are removed from the list.



Auto Close Task Selection

The **Close Task Selection** program allows closing multiple tasks at once.



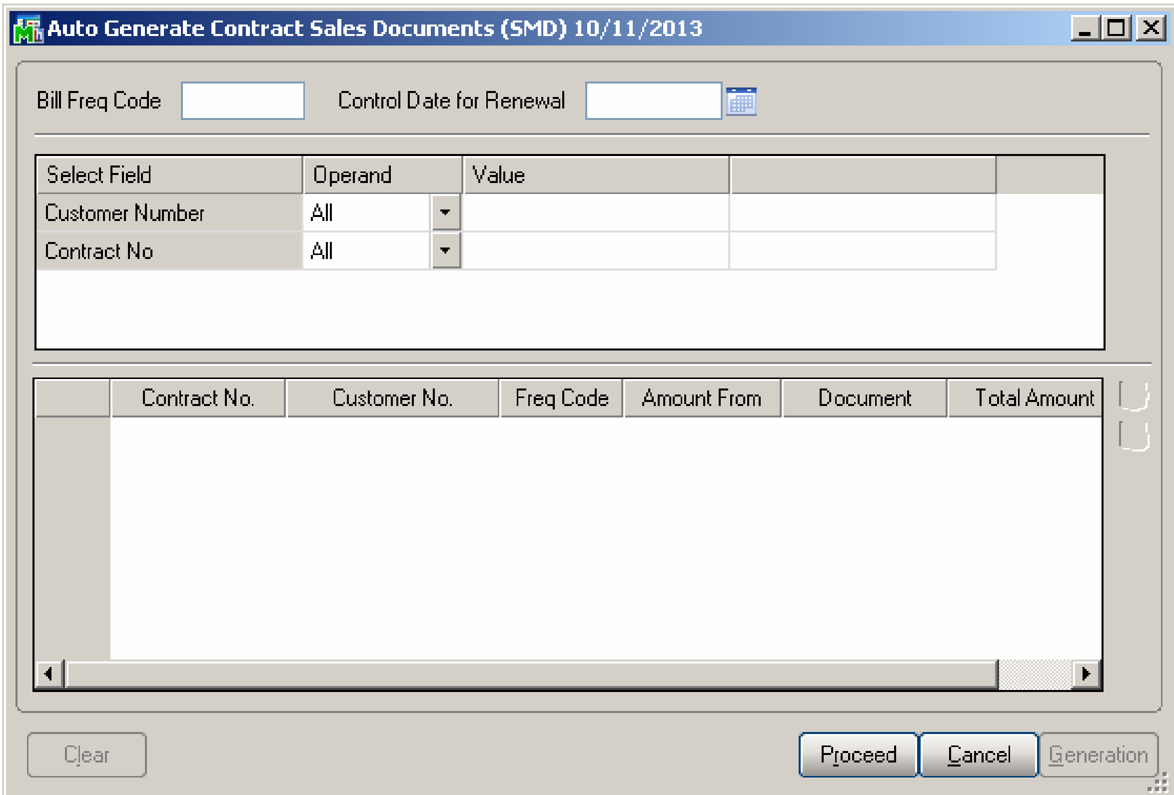
Tasks can be selected by **Customer Number**, **Task Number**, **Task Date**, **Task Status**, **and Contract Number**.

Only tasks not having active dispatches are displayed in the grid.

Select **Include** checkbox for the tasks you want to close, and click the **Close** button.

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.



You can choose to process all the customers and contracts or select only those with numbers falling into the range set by starting and ending. Also you can select by Bill Frequency Code.

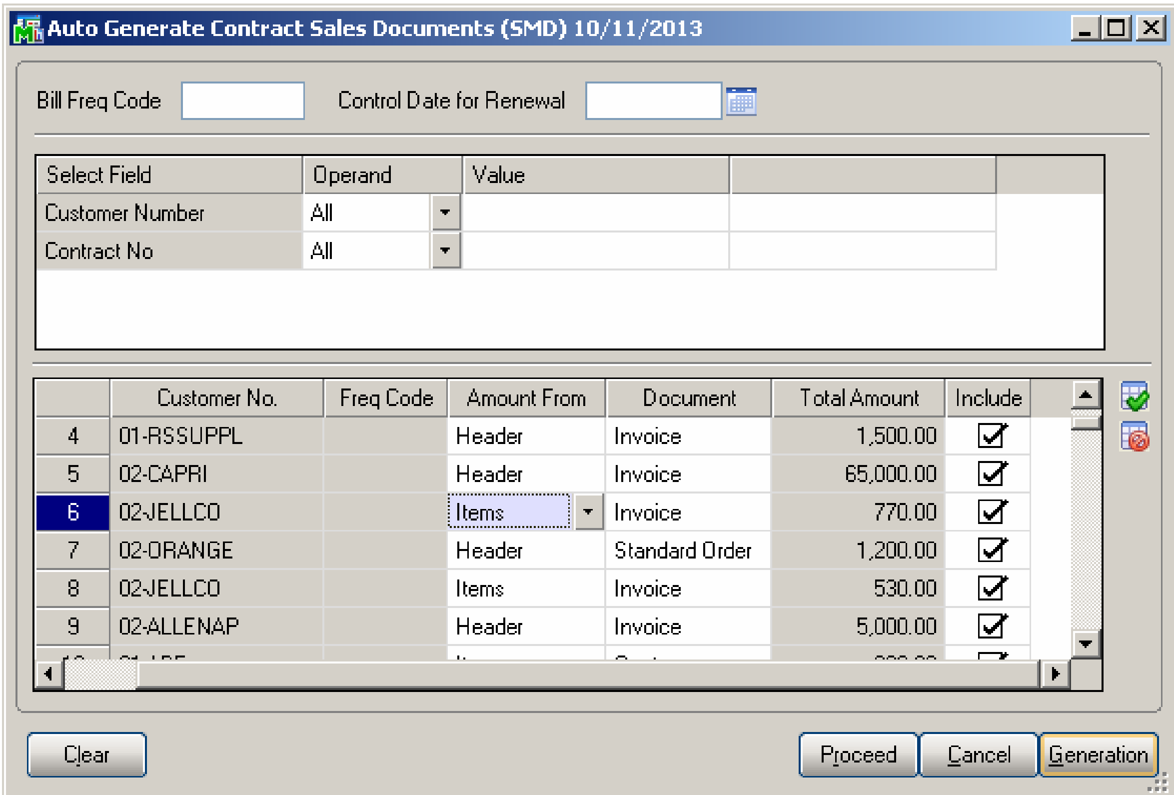
The **Control Date for Renewal** field allows for specifying the date for Contract renewal. This date should be greater than the **Contract Item Ending Date** in order to have the Contract Item selected for renewal. For contract renewals it is necessary to generate the Invoice with Amount From option set to Items.

After making selections, click the **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.

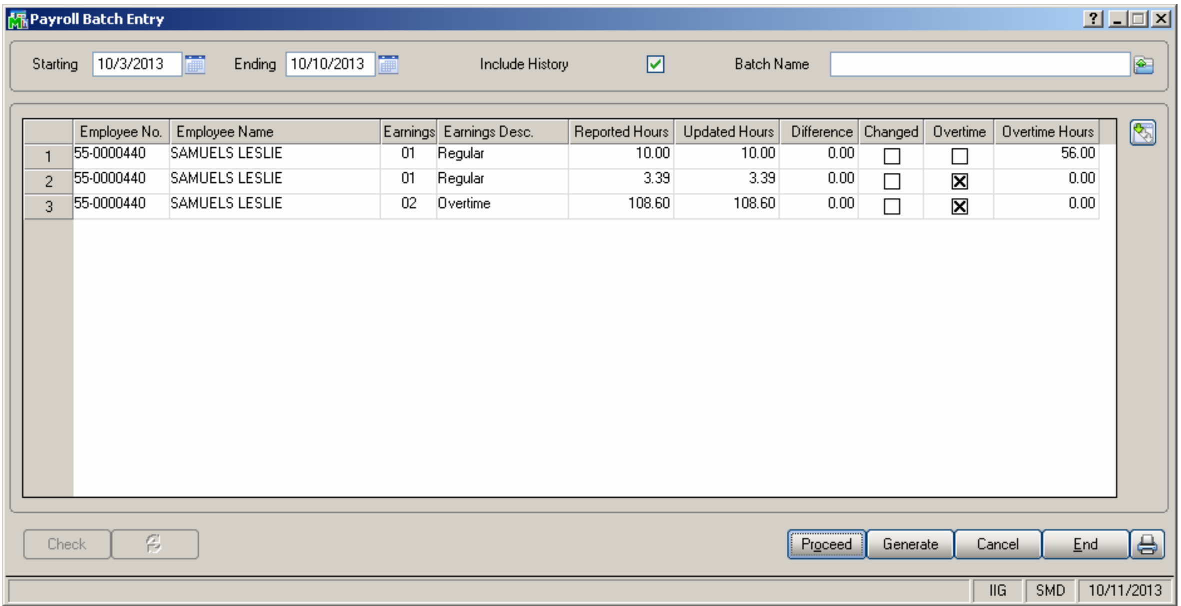
Place or remove checkmarks in the **Include** column of the list. Auto generation will generate invoices only for checked contracts.



To start generating invoices, click the **Generation** button.

Payroll Batch Entry

Select the **Payroll Batch Entry** program under the **Service Management Main** menu.



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.

The program will load the Labor lines of the dispatches meeting the following conditions:

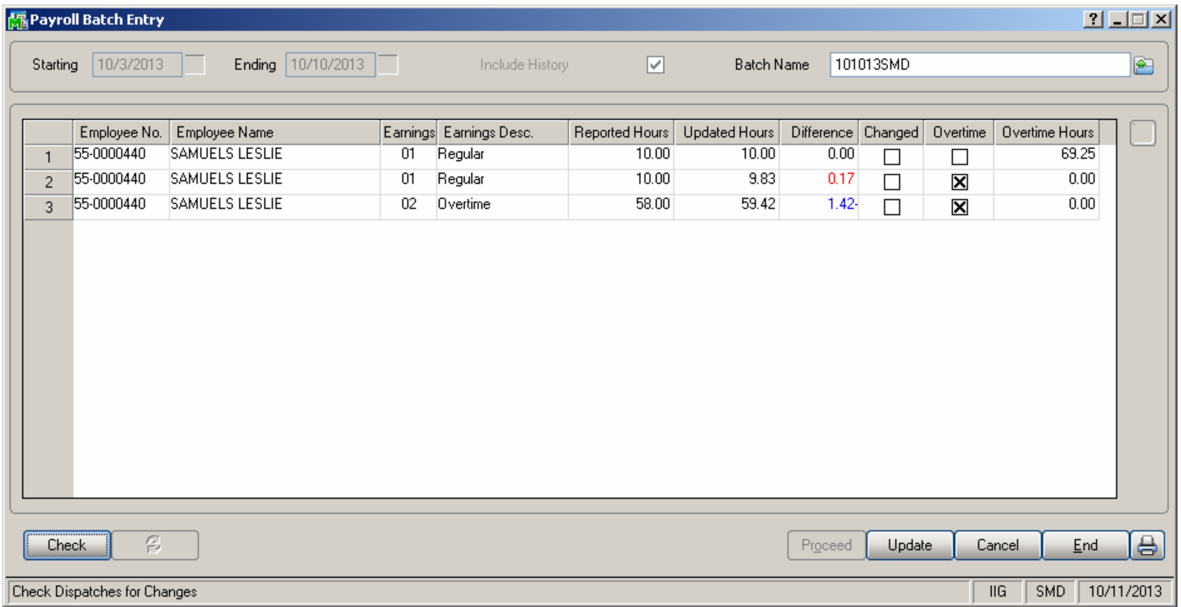
- **Dispatch Staring Date** falls in the selected time interval.
- The **Technician** on the Dispatch Labor line has an employee code assigned in the Technician Code Maintenance.
- The Dispatch line Labor has the Regular and Overtime Earning Codes specified on the Labor Code Maintenance.

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.

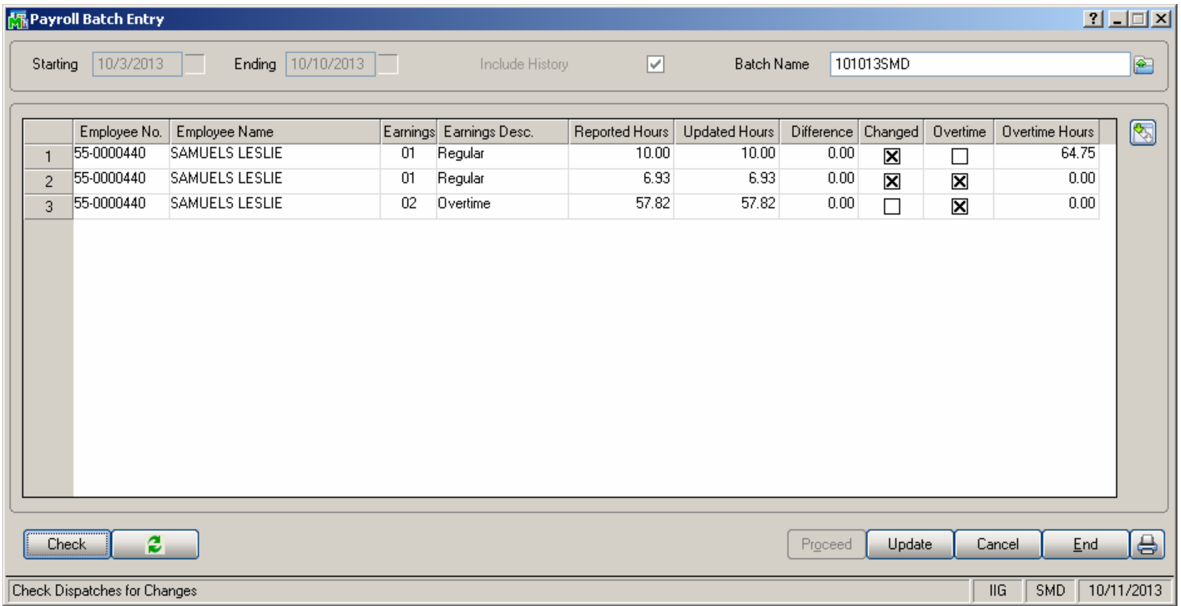
To open an existing batch, click the **Open Batch** button, and select the previously saved batch.

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.

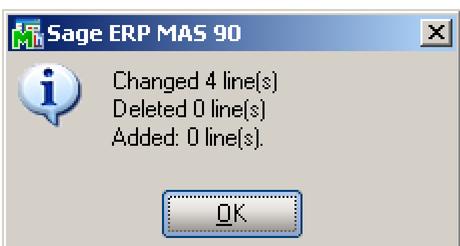


For a new batch, enter the **Batch Name** and click the **Generate** button. The batch is generated and saved.



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.

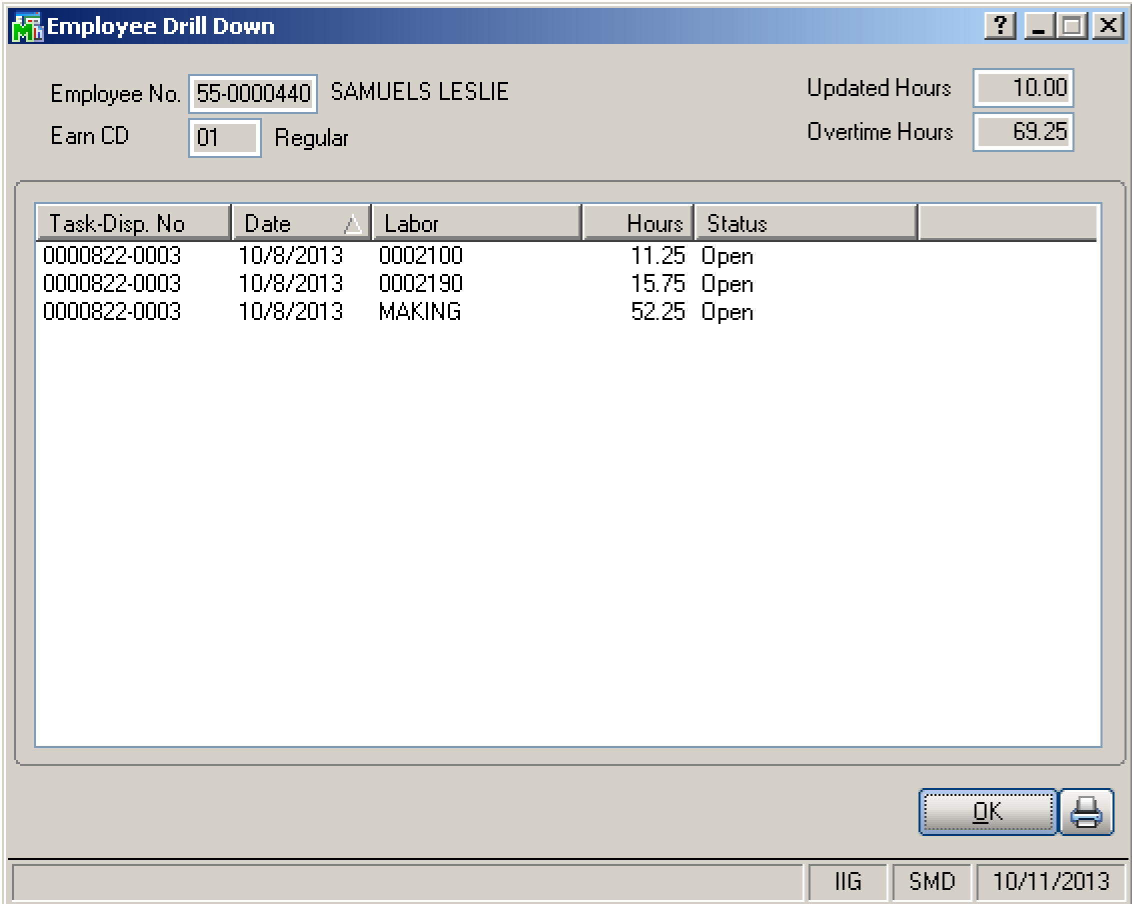


Click the **Refresh** button to reflect the changes.

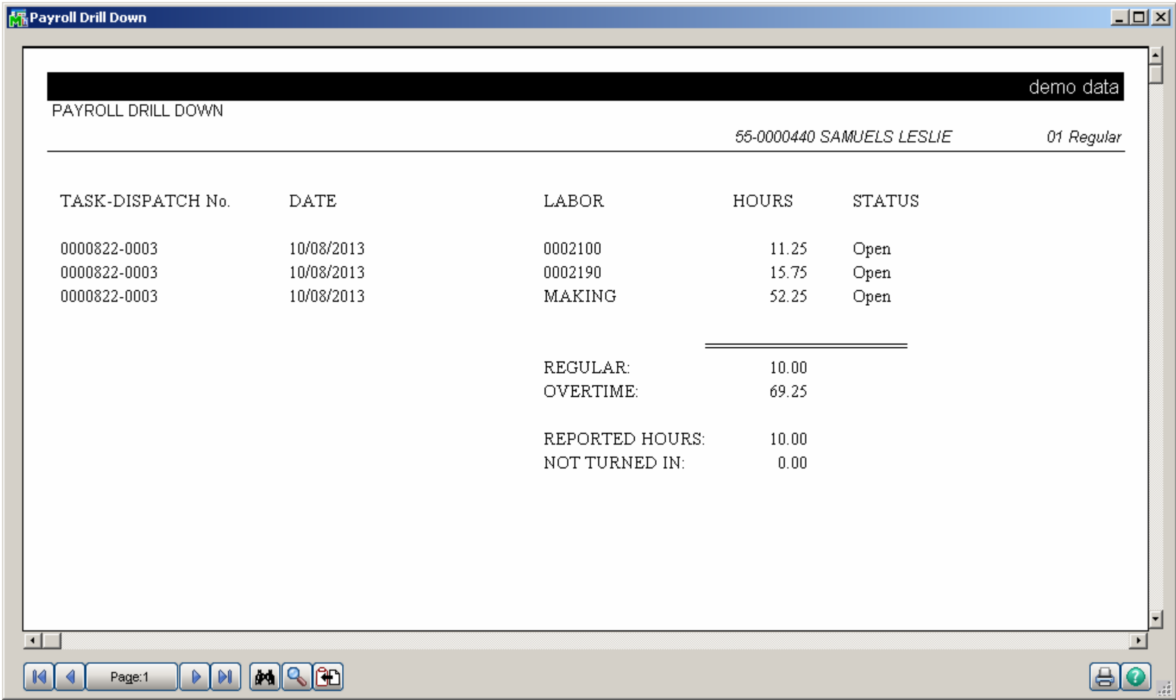
When a Payroll Batch is used in the Payroll Data Entry, the Updated Hours are payable.

Select a line and click the **Drill Down** button to see the details of hours for the selected Employee.

The Drill Down for the Line 1 before Refresh looked like this:

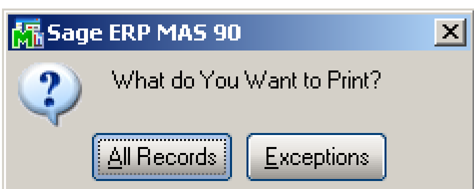


Click the **Print** button in the **Employee Drill Down** screen. Here is an example of Drill Down information printout:

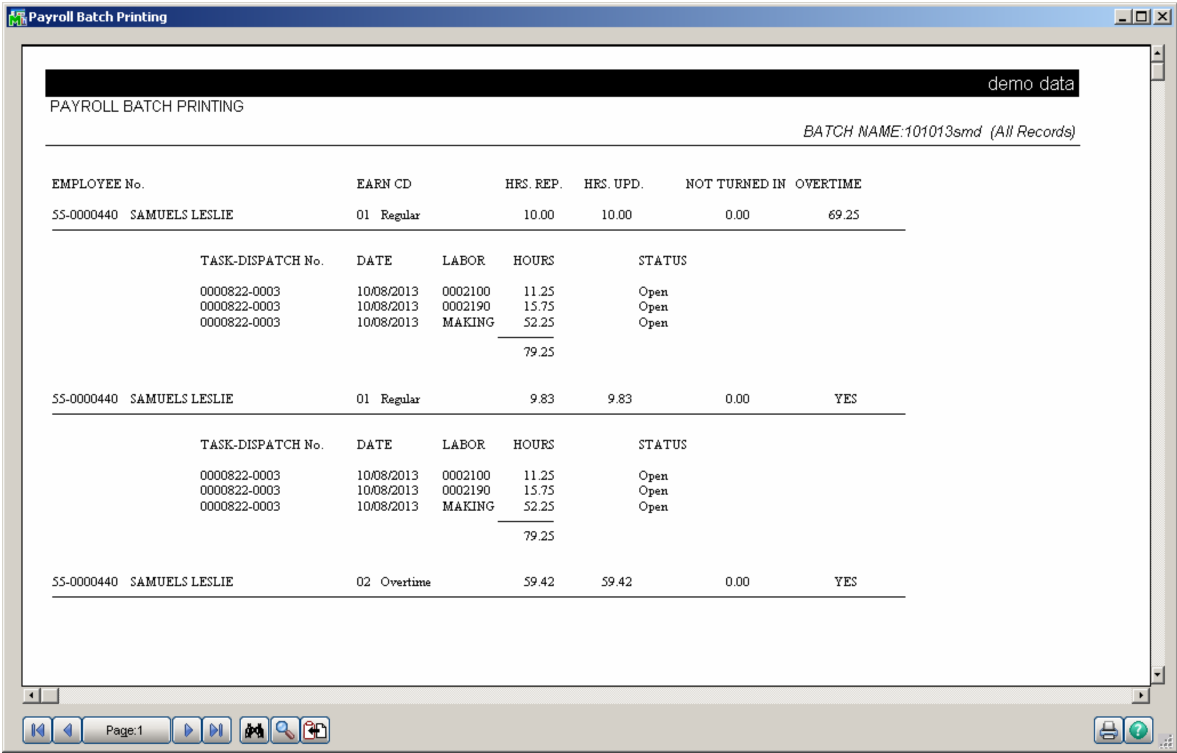


In the **Payroll Batch Entry** screen, click the **Print** button.

The following message asks whether to print all the lines or only those with non-zero Difference Hours:



Here is an example of printout:



Payroll Batch Printing

demo data

PAYROLL BATCH PRINTING

BATCH NAME:101013smd (All Records)

EMPLOYEE No.		EARN CD	HRS. REP.	HRS. UPD.	NOT TURNED IN	OVERTIME
55-0000440	SAMUELS LESLIE	01 Regular	10.00	10.00	0.00	69.25

TASK-DISPATCH No.	DATE	LABOR	HOURS	STATUS
0000822-0003	10/08/2013	0002100	11.25	Open
0000822-0003	10/08/2013	0002190	15.75	Open
0000822-0003	10/08/2013	MAKING	52.25	Open
			79.25	

EMPLOYEE No.		EARN CD	HRS. REP.	HRS. UPD.	NOT TURNED IN	OVERTIME
55-0000440	SAMUELS LESLIE	01 Regular	9.83	9.83	0.00	YES

TASK-DISPATCH No.	DATE	LABOR	HOURS	STATUS
0000822-0003	10/08/2013	0002100	11.25	Open
0000822-0003	10/08/2013	0002190	15.75	Open
0000822-0003	10/08/2013	MAKING	52.25	Open
			79.25	

EMPLOYEE No.		EARN CD	HRS. REP.	HRS. UPD.	NOT TURNED IN	OVERTIME
55-0000440	SAMUELS LESLIE	02 Overtime	59.42	59.42	0.00	YES

Page: 1

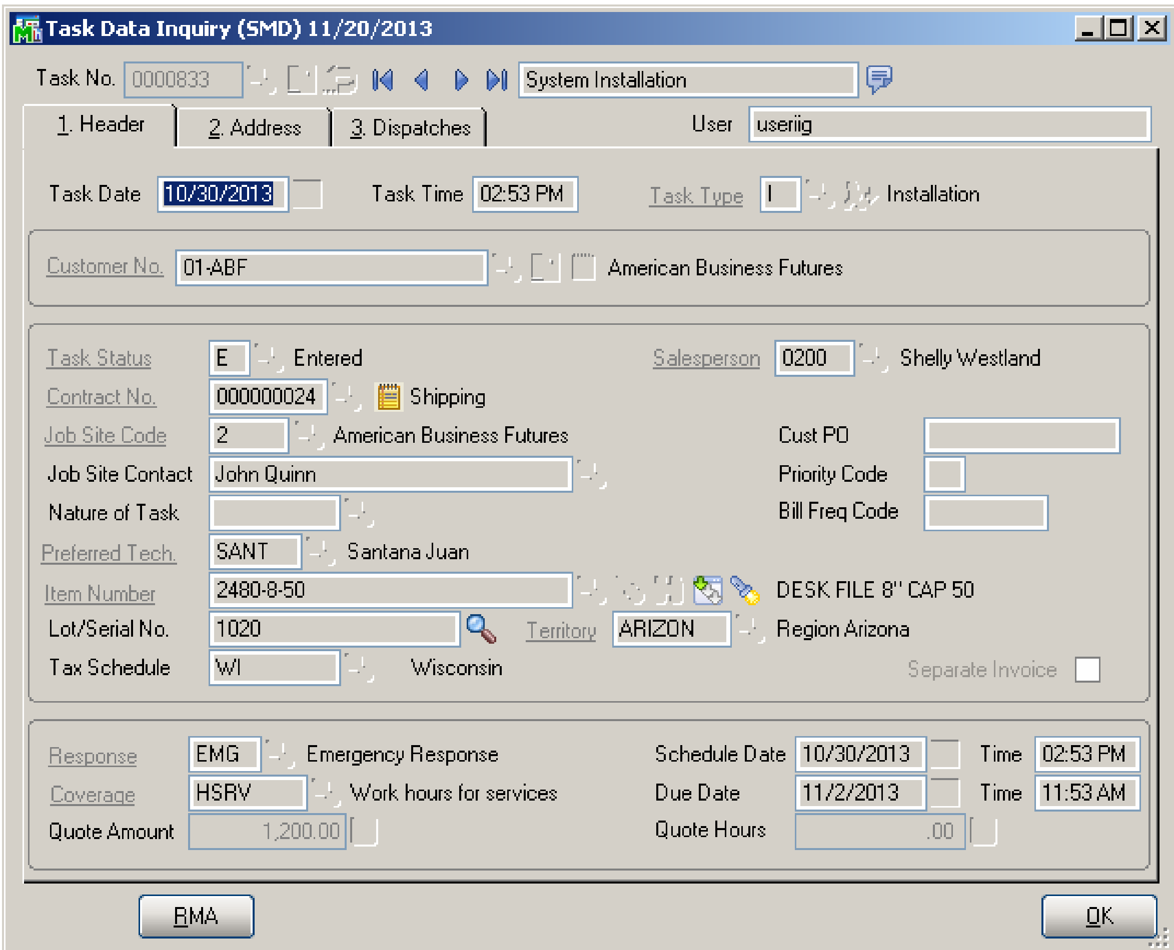
In the **Payroll Batch Entry**, click the **Update** button to save changes in the file.

The Dispatch line will not be selected if it is saved in some batch once.

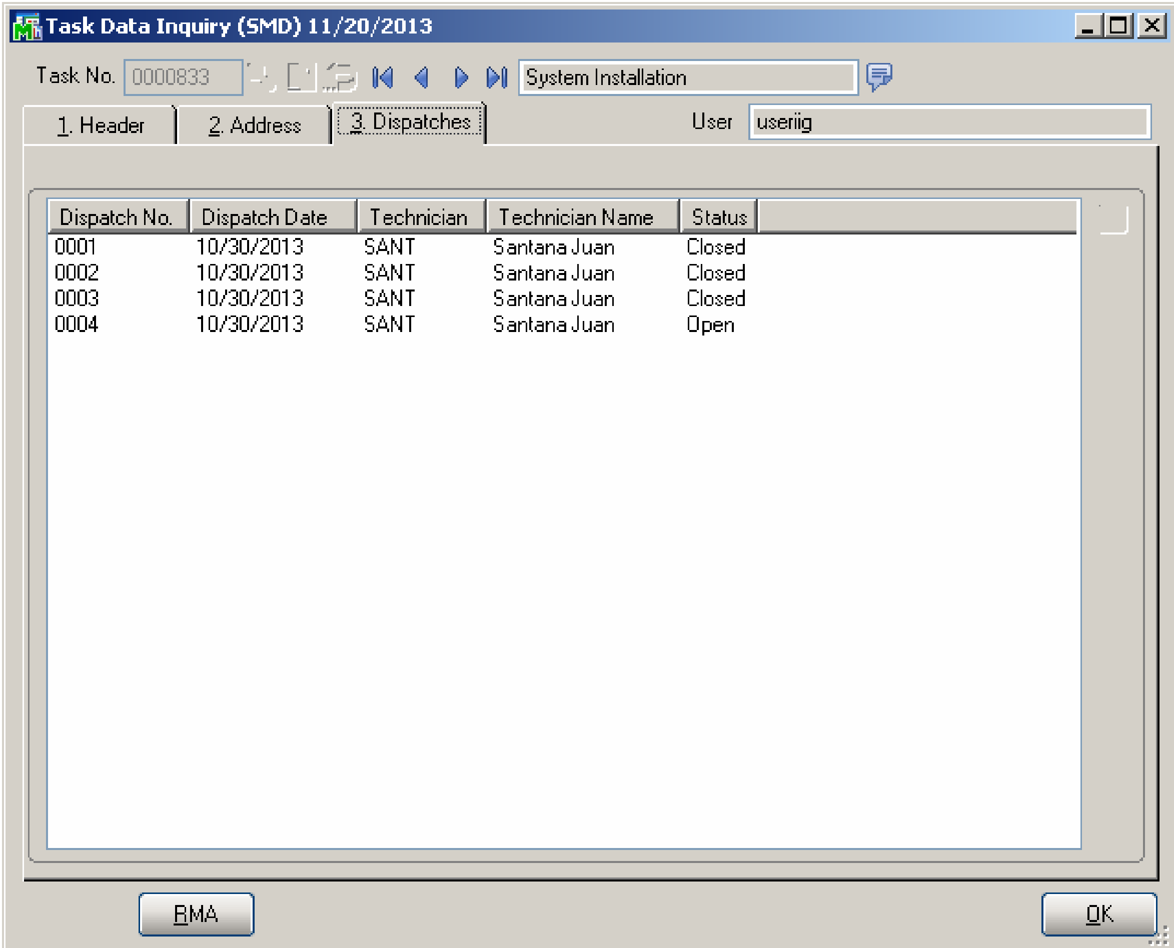
The Inquiries Menu

Task Inquiry

The **Task Inquiry** program enables viewing the active tasks in a read only mode.

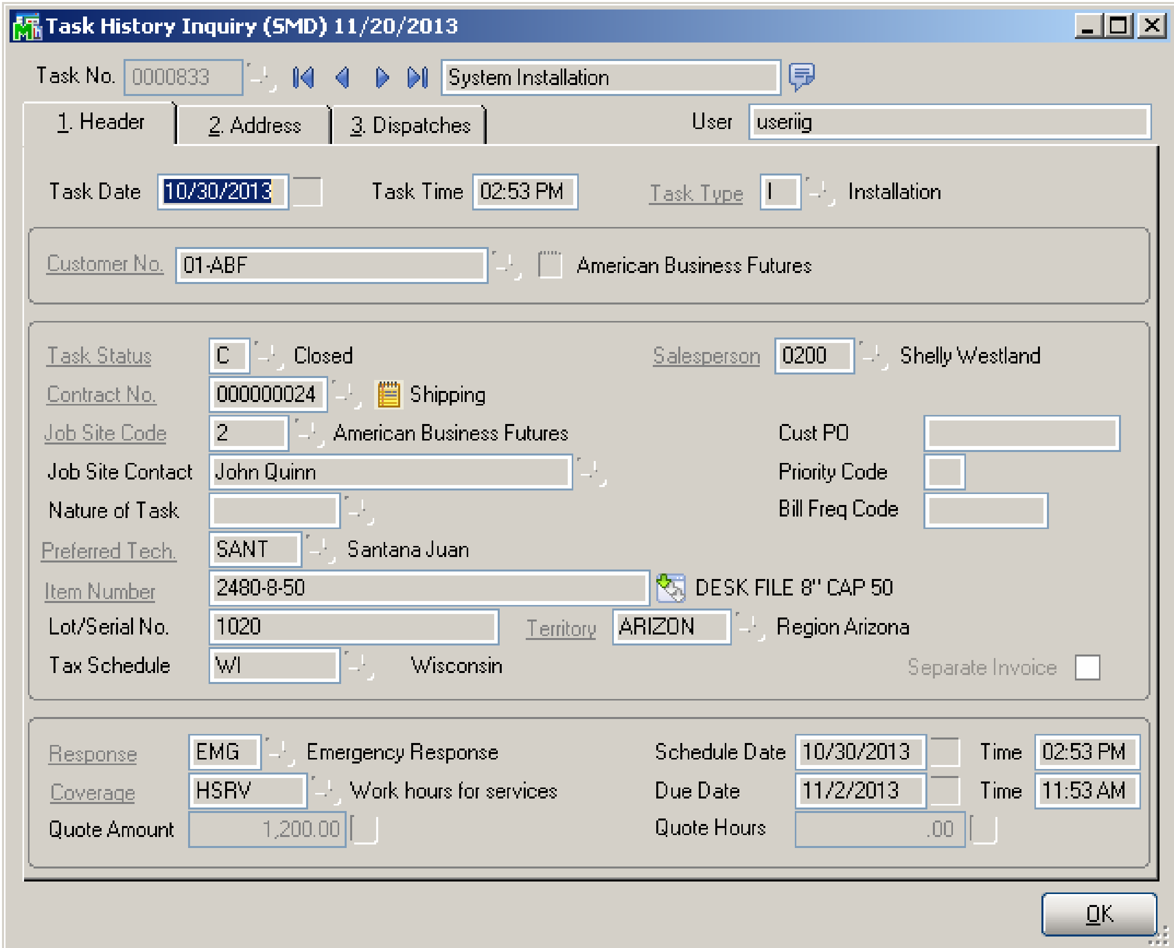


The Address tab displays the Address information and the Dispatches are shown on the Dispatches Tab:



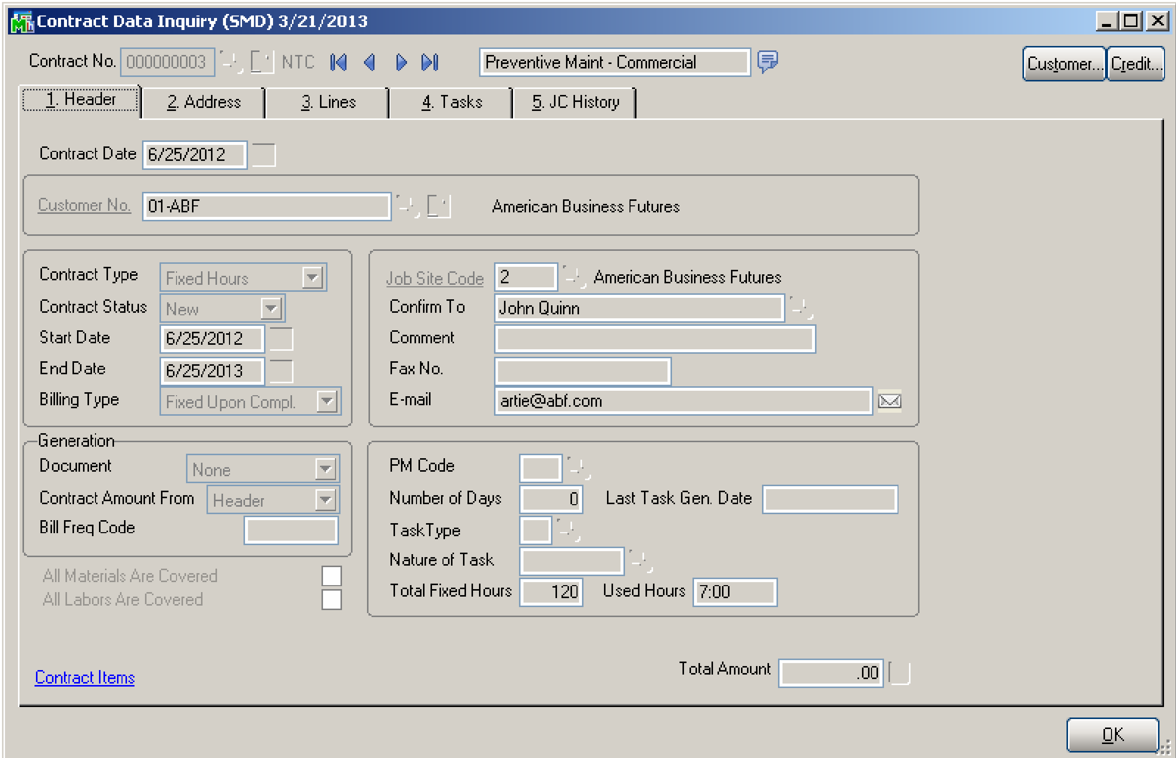
Task History Inquiry

The **Task History Inquiry** screen is used to locate and view tasks that have been closed.

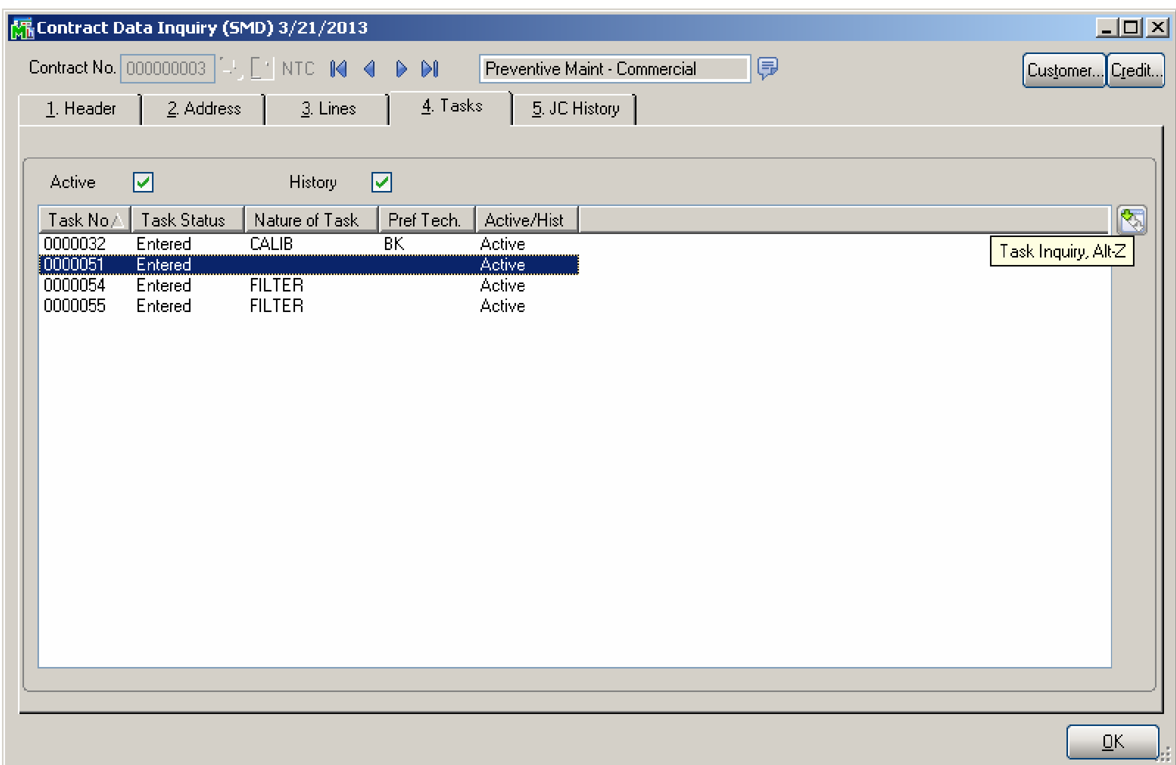


Contract Inquiry

The **Contract Inquiry** is used to locate and view Contracts in the view. Mode:

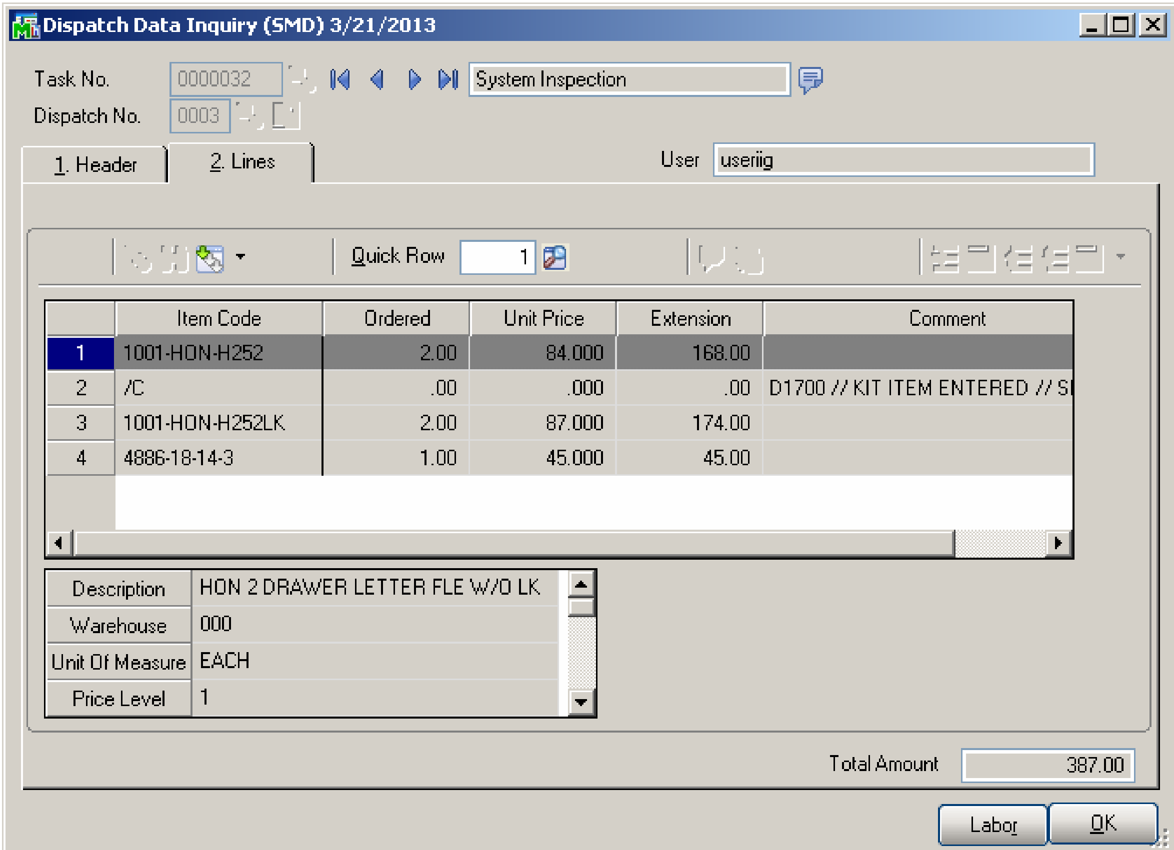


From the **Contract Inquiry Tasks tab** there is an option of drill down to Task Inquiry.



Dispatch Inquiry

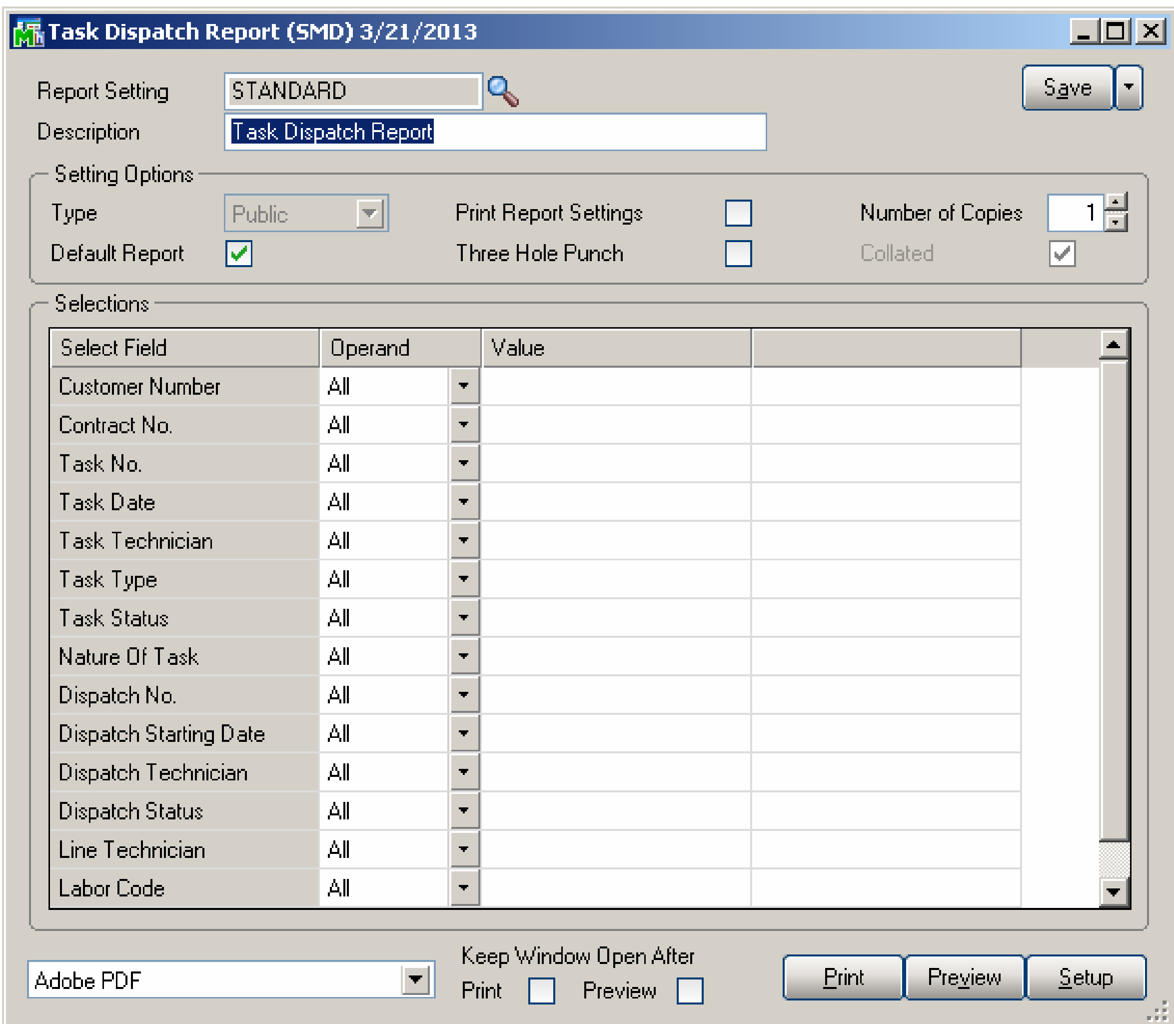
The **Dispatch Inquiry** is used to view detailed information of Dispatches:



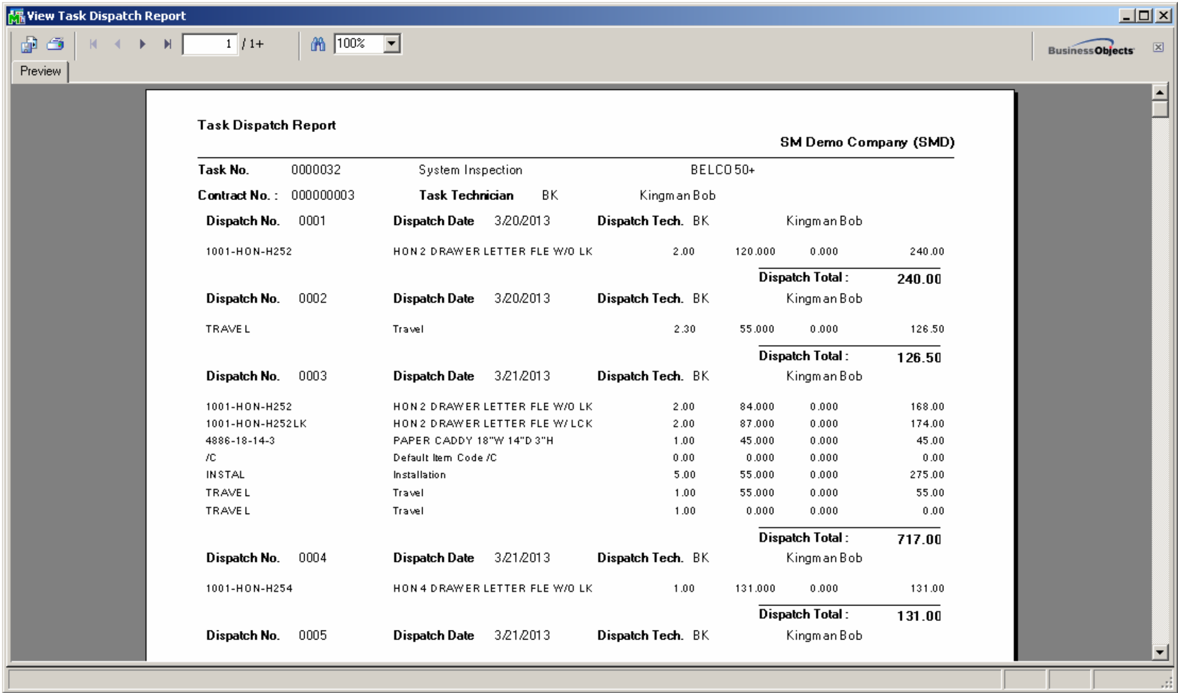
The Reports Menu

Task/Dispatch Report

The **Task/Dispatch Report** program enables you to print various reports on tasks and dispatches information. The information to be displayed can be filtered using the selection options. 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.

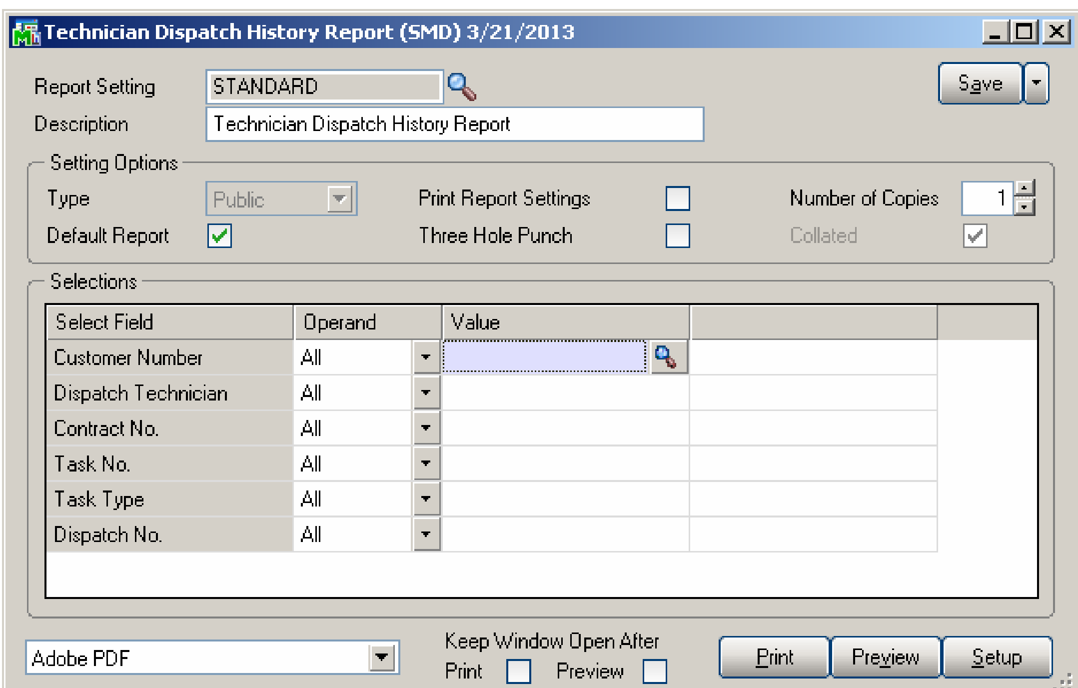


Here is an example of printout for Task Dispatch report printed for a specified Contract:

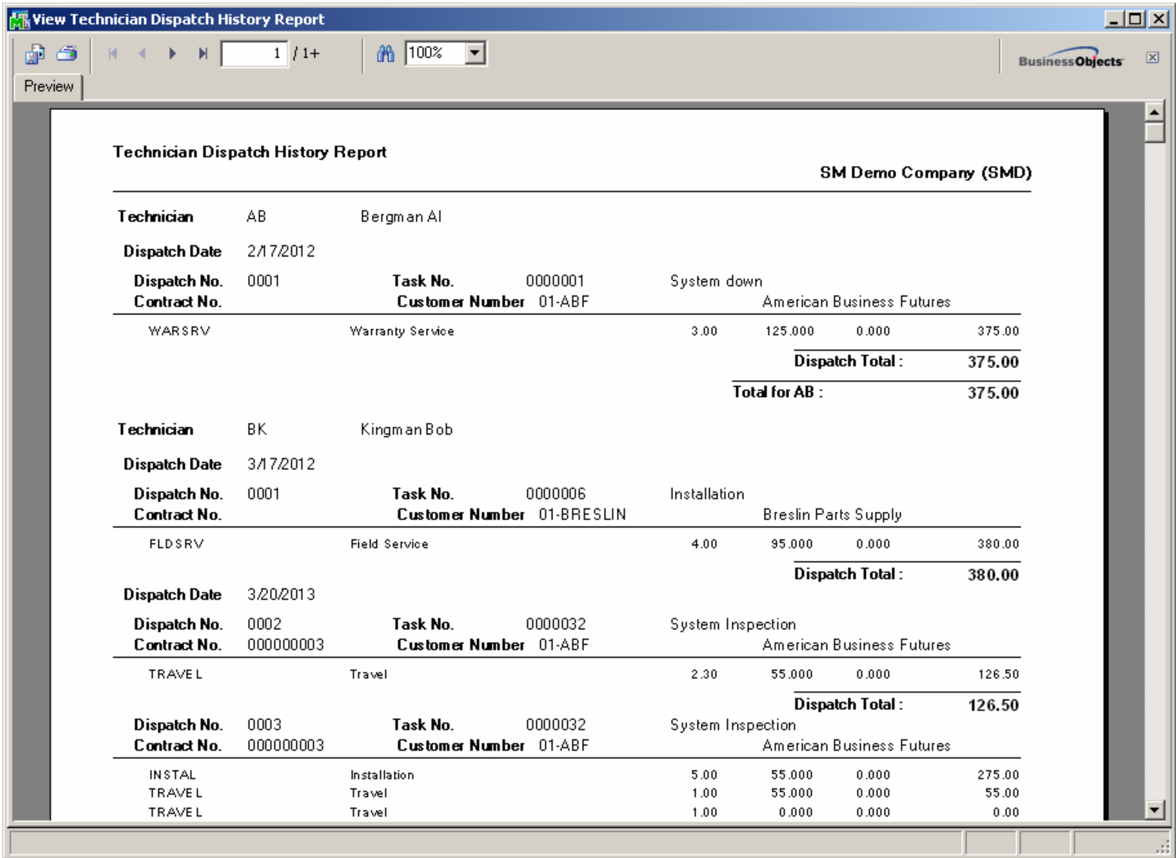


Technician Dispatch History Report

This Report allows the user to get information about the Tasks/Dispatches by technician:



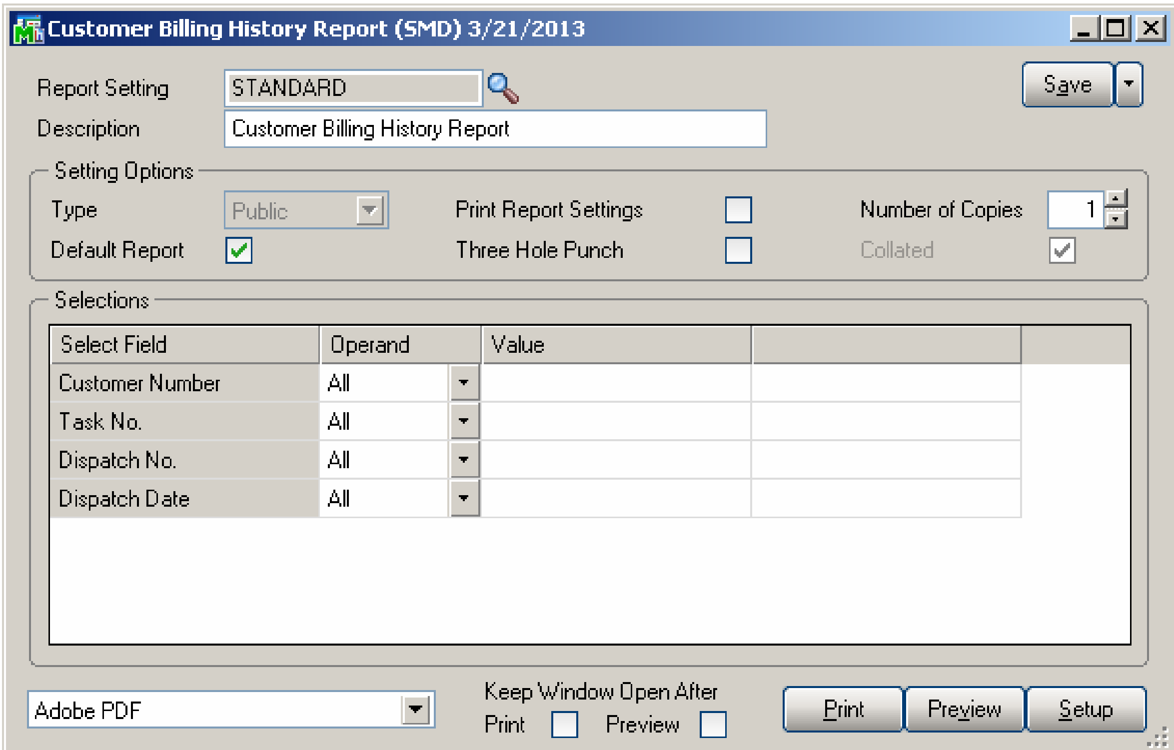
Here is an example of printout:



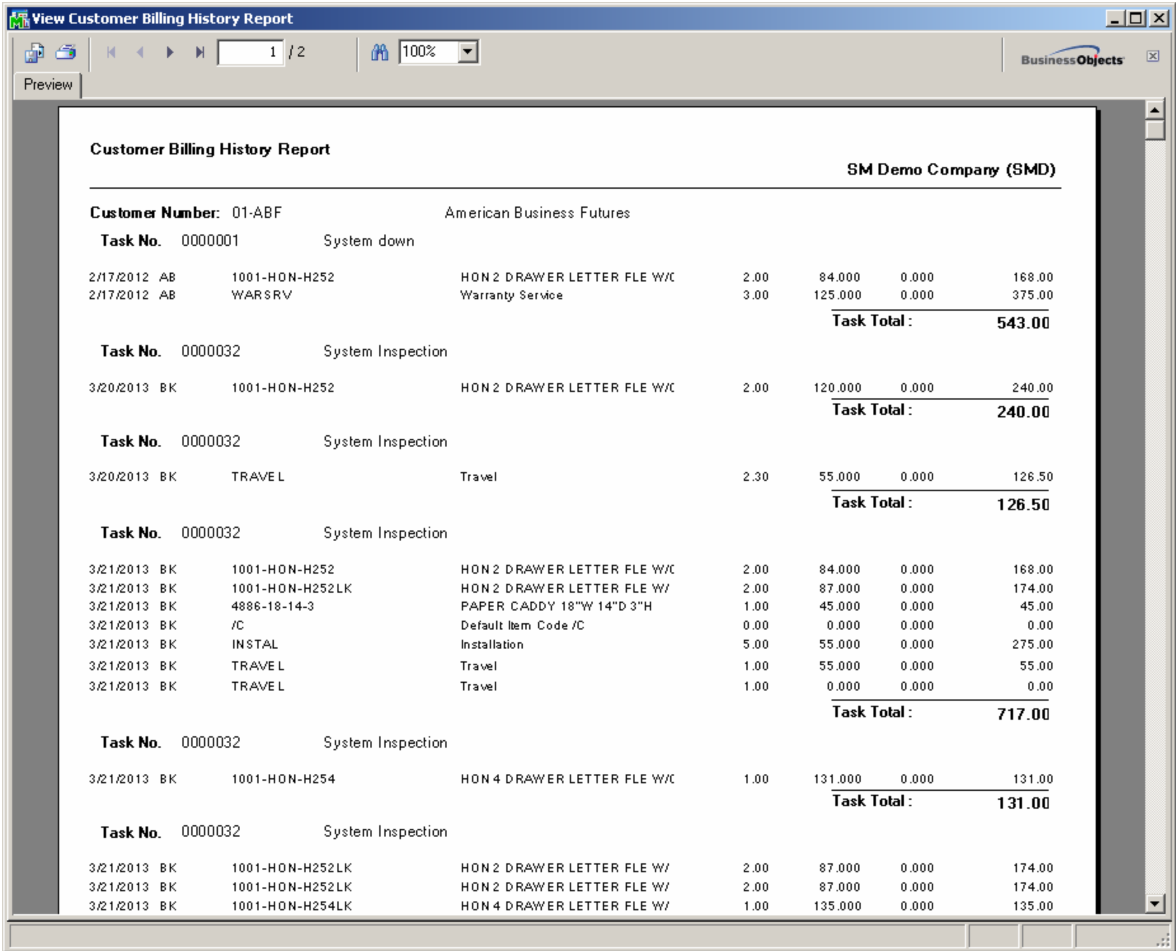
Both open and closed Dispatches are included in the report.

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).



Here is an example of printout:



Customer Billing History Report

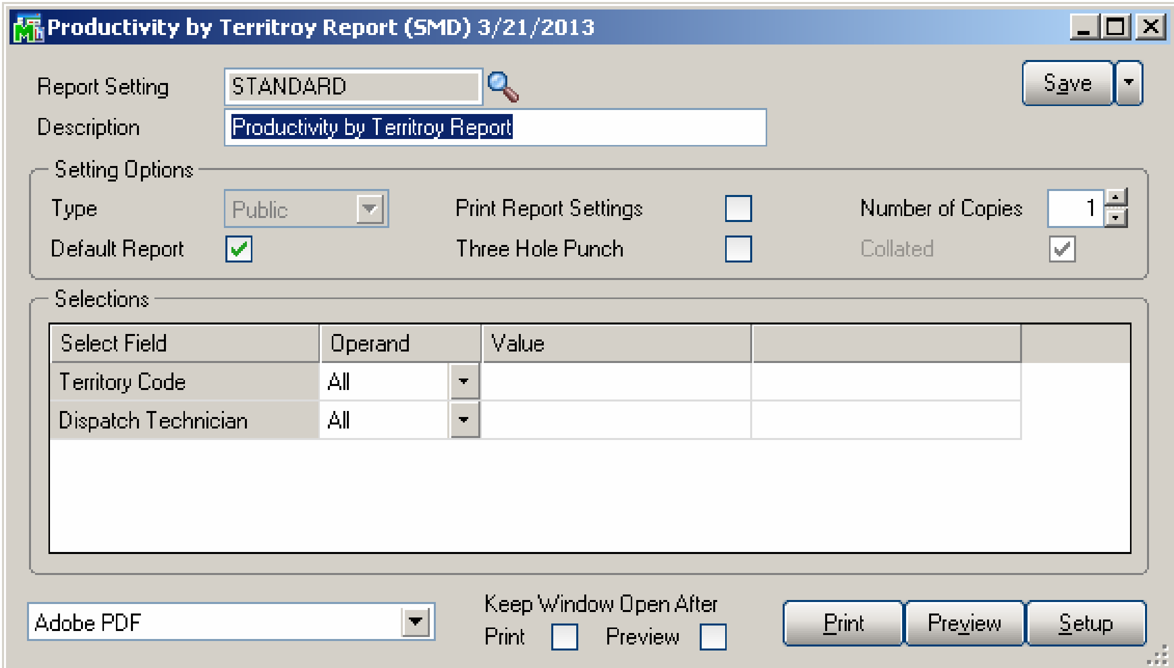
SM Demo Company (SMD)

Customer Number: 01-ABF American Business Futures

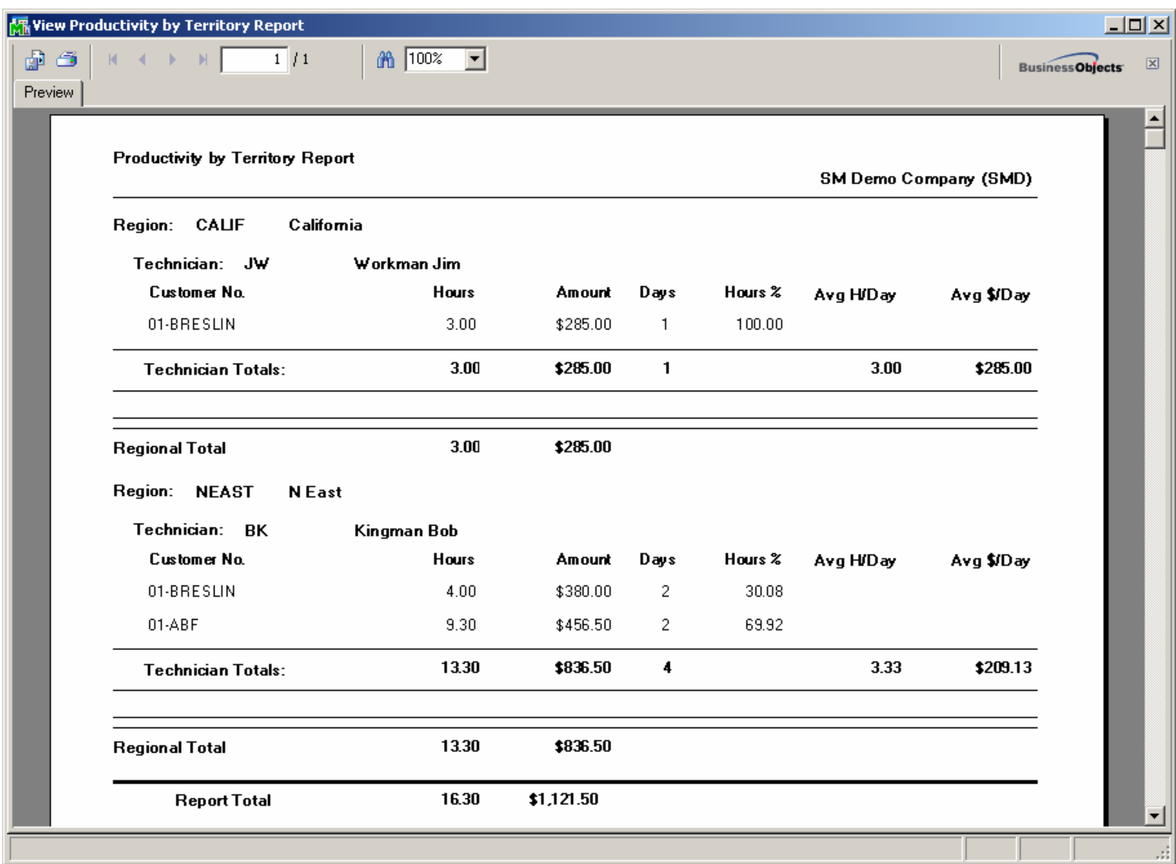
Task No. 0000001	System down						
2/17/2012	AB	1001-HON-H252	HON 2 DRAWER LETTER FLE W/(	2.00	84.000	0.000	168.00
2/17/2012	AB	WARSRV	Warranty Service	3.00	125.000	0.000	375.00
					Task Total :		**543.00**
Task No. 0000032	System Inspection						
3/20/2013	BK	1001-HON-H252	HON 2 DRAWER LETTER FLE W/(	2.00	120.000	0.000	240.00
					Task Total :		**240.00**
Task No. 0000032	System Inspection						
3/20/2013	BK	TRAVEL	Travel	2.30	55.000	0.000	126.50
					Task Total :		**126.50**
Task No. 0000032	System Inspection						
3/21/2013	BK	1001-HON-H252	HON 2 DRAWER LETTER FLE W/(	2.00	84.000	0.000	168.00
3/21/2013	BK	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/	2.00	87.000	0.000	174.00
3/21/2013	BK	4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	1.00	45.000	0.000	45.00
3/21/2013	BK	/C	Default Item Code /C	0.00	0.000	0.000	0.00
3/21/2013	BK	INSTAL	Installation	5.00	55.000	0.000	275.00
3/21/2013	BK	TRAVEL	Travel	1.00	55.000	0.000	55.00
3/21/2013	BK	TRAVEL	Travel	1.00	0.000	0.000	0.00
					Task Total :		**717.00**
Task No. 0000032	System Inspection						
3/21/2013	BK	1001-HON-H254	HON 4 DRAWER LETTER FLE W/(	1.00	131.000	0.000	131.00
					Task Total :		**131.00**
Task No. 0000032	System Inspection						
3/21/2013	BK	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/	2.00	87.000	0.000	174.00
3/21/2013	BK	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/	2.00	87.000	0.000	174.00
3/21/2013	BK	1001-HON-H254LK	HON 4 DRAWER LETTER FLE W/	1.00	135.000	0.000	135.00

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.



Here is an example of printout:


View Productivity by Territory Report

Productivity by Territory Report

SM Demo Company (SMD)

Region: CALIF California

Technician: JW Workman Jim

Customer No.	Hours	Amount	Days	Hours %	Avg H/Day	Avg $/Day
01-BRESLIN	3.00	$285.00	1	100.00		
Technician Totals:	3.00	$285.00	1		3.00	$285.00
Regional Total	3.00	$285.00				

Region: NEAST N East

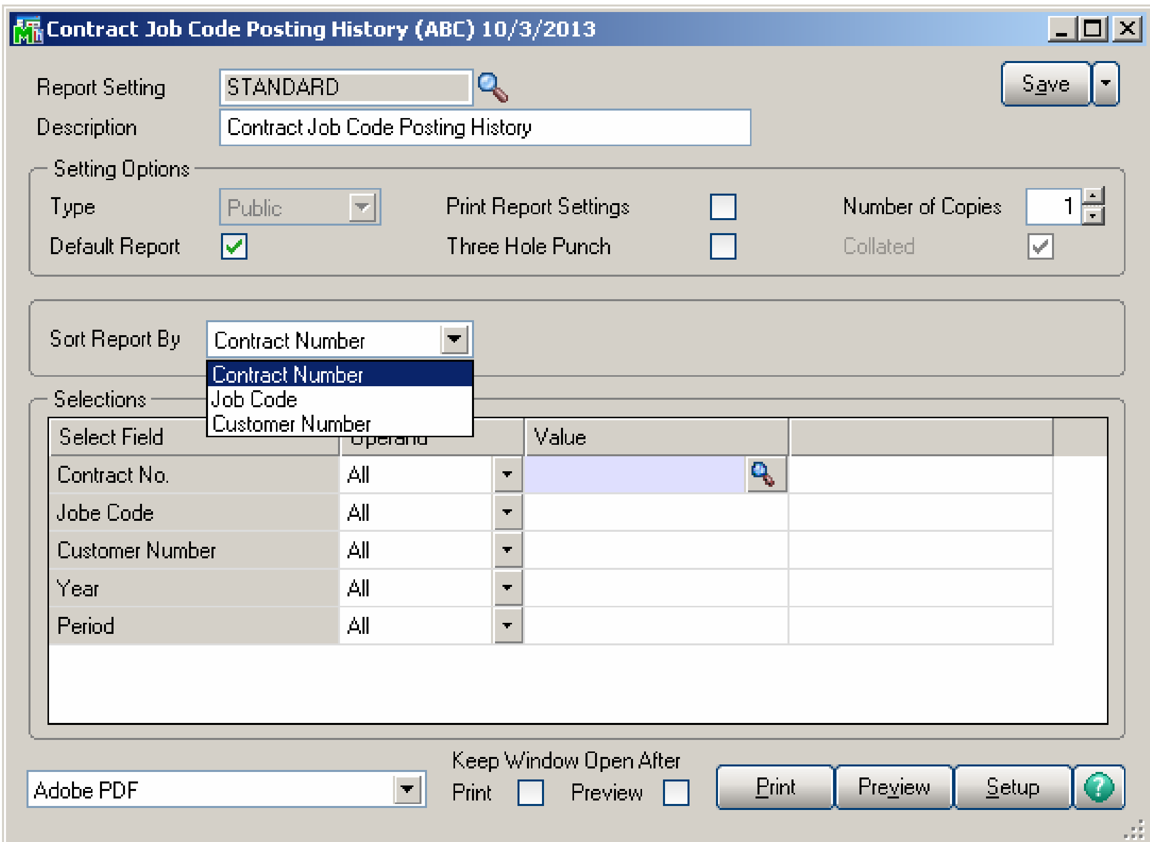
Technician: BK Kingman Bob

Customer No.	Hours	Amount	Days	Hours %	Avg H/Day	Avg $/Day
01-BRESLIN	4.00	$380.00	2	30.08		
01-ABF	9.30	$456.50	2	69.92		
Technician Totals:	13.30	$836.50	4		3.33	$209.13
Regional Total	13.30	$836.50				
Report Total	16.30	$1,121.50				

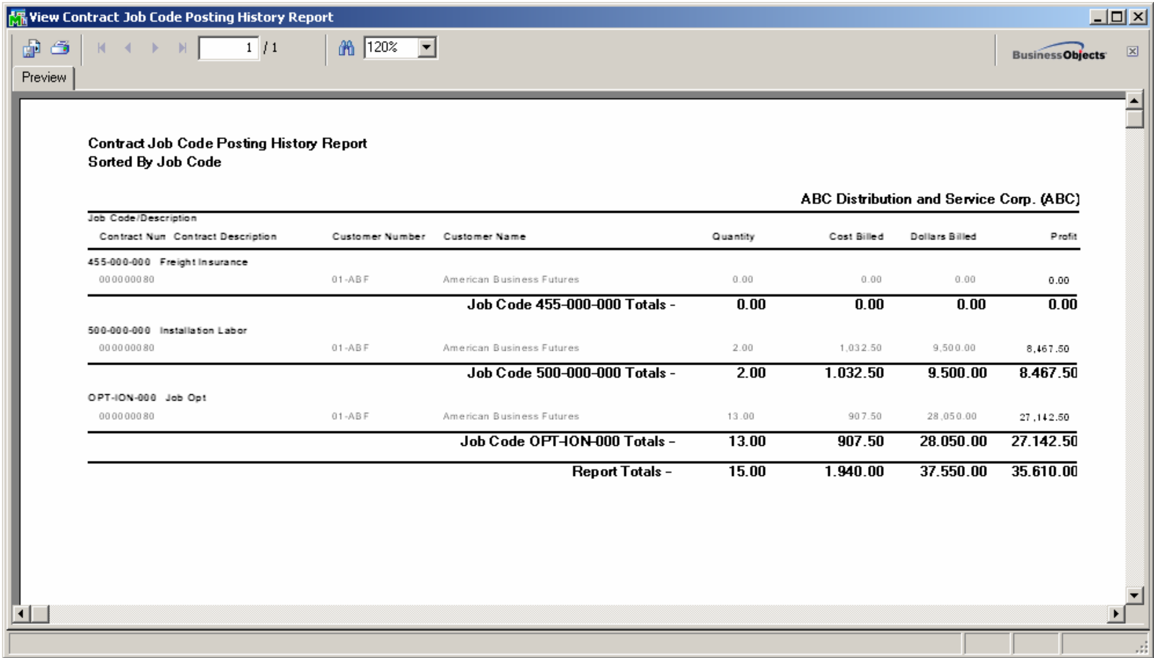
Contract Job Code Reports

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.



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:



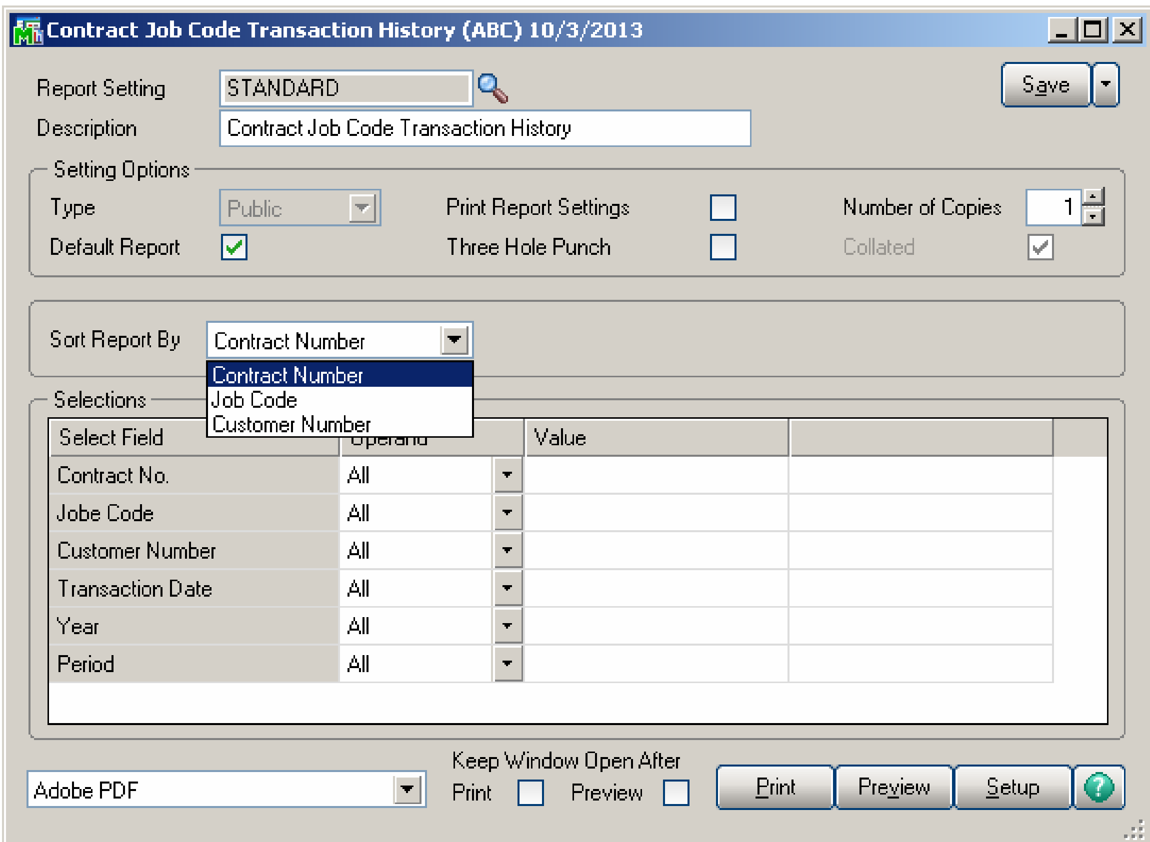
Contract Job Code Posting History Report
Sorted By Job Code

ABC Distribution and Service Corp. (ABC)

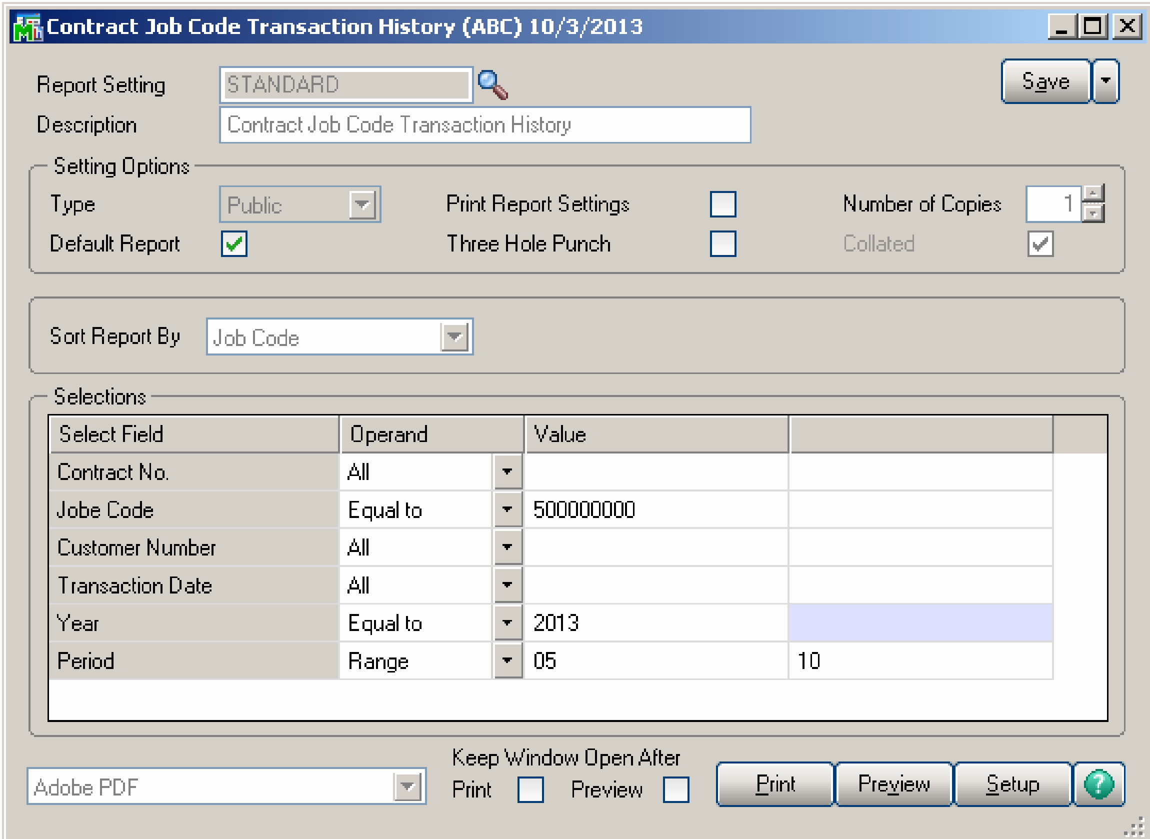
Job Code/Description Contract Num Contract Description	Customer Number	Customer Name	Quantity	Cost Billed	Dollars Billed	Profit
455-000-000 Freight Insurance						
000000080	01-ABF	American Business Futures	0.00	0.00	0.00	0.00
		Job Code 455-000-000 Totals -	**0.00**	**0.00**	**0.00**	**0.00**
500-000-000 Installation Labor						
000000080	01-ABF	American Business Futures	2.00	1,032.50	9,500.00	8,467.50
		Job Code 500-000-000 Totals -	**2.00**	**1.032.50**	**9.500.00**	**8.467.50**
OPT-ION-000 Job Opt						
000000080	01-ABF	American Business Futures	13.00	907.50	28,050.00	27,142.50
		Job Code OPT-ION-000 Totals -	**13.00**	**907.50**	**28.050.00**	**27.142.50**
		Report Totals -	**15.00**	**1.940.00**	**37.550.00**	**35.610.00**

Contract Job Code Transaction History

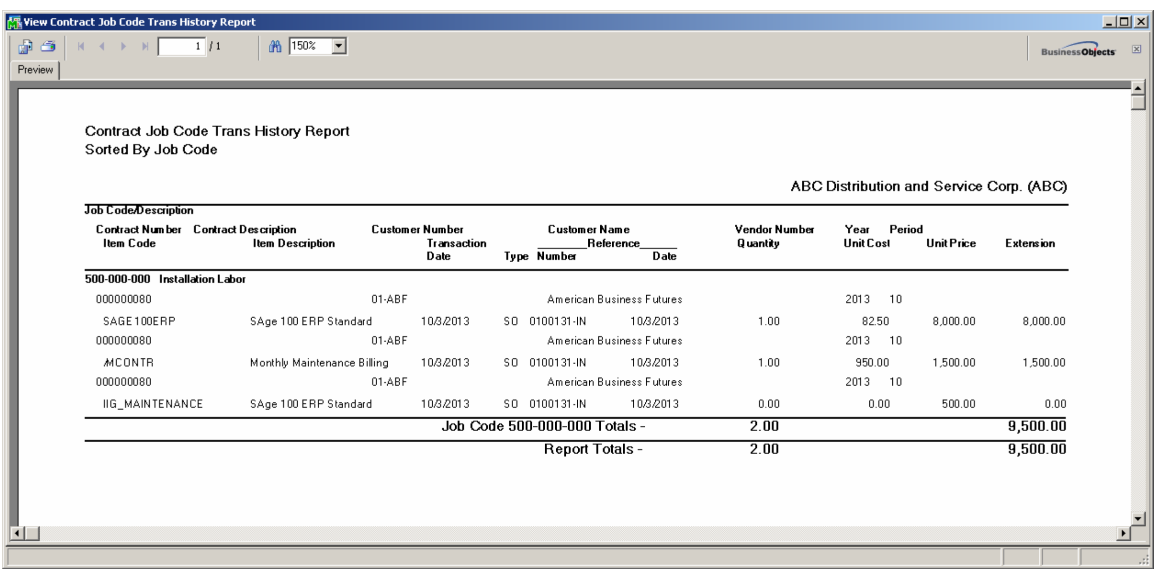
The **Contract Job Code Transaction History Report** added under the **Service Management** provides information about all transactions from Contracts posted to jobs. The report provides a complete, detailed history of activity for the job, including the Invoice Number, Transaction Date, Vendor Number and the Cost.



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 Job Code:



Here is an example of printout:



Contract Job Code Trans History Report
Sorted By Job Code

ABC Distribution and Service Corp. (ABC)

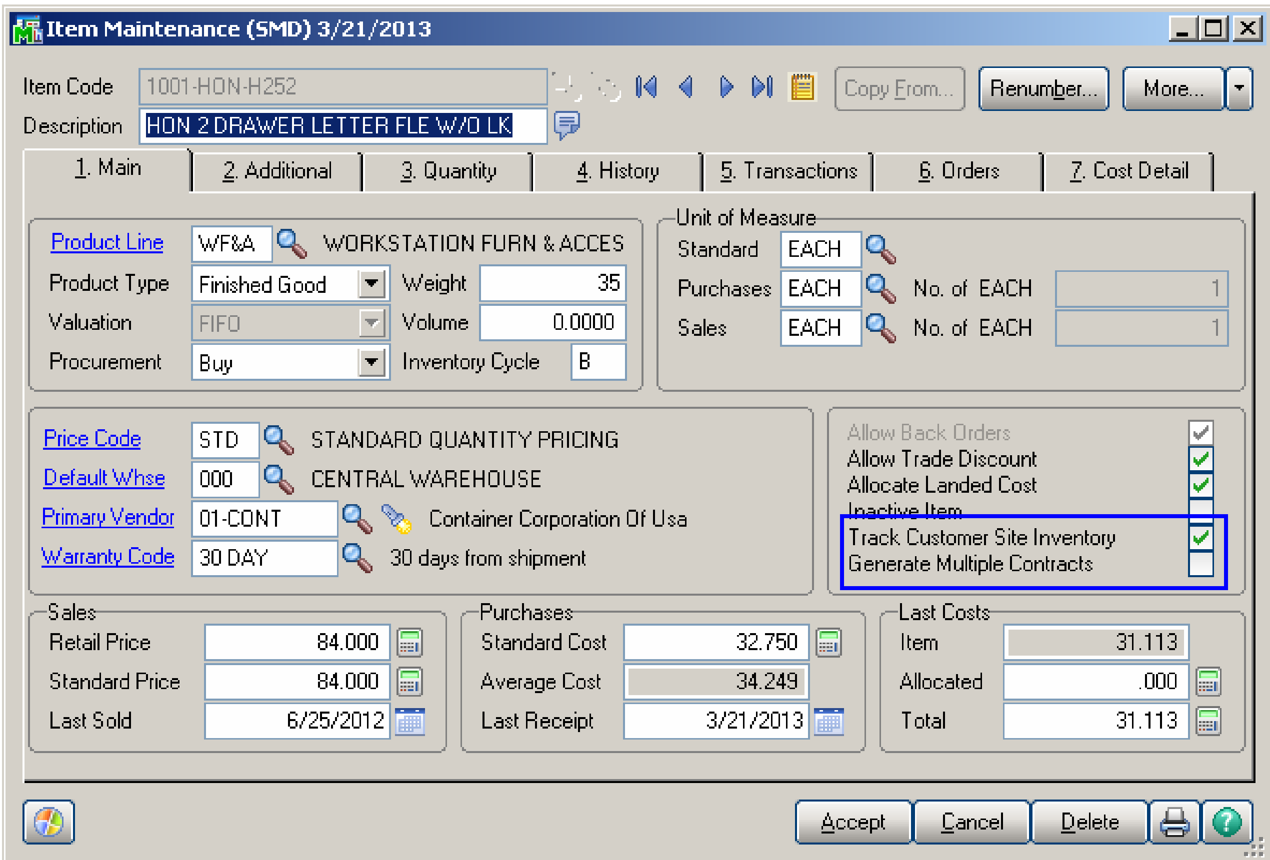
Job Code/Description

Contract Number / Item Code	Contract Description / Item Description	Customer Number / Transaction Date	Type	Customer Name / Reference Number	Reference Date	Vendor Number / Quantity	Year / Unit Cost	Period / Unit Price	Extension
500-000-000 Installation Labor									
000000080		01-ABF		American Business Futures			2013	10	
SAGE100ERP	SAge 100 ERP Standard	10/3/2013	SO	0100131-IN	10/3/2013	1.00	82.50	8,000.00	8,000.00
000000080		01-ABF		American Business Futures			2013	10	
/MCONTR	Monthly Maintenance Billing	10/3/2013	SO	0100131-IN	10/3/2013	1.00	950.00	1,500.00	1,500.00
000000080		01-ABF		American Business Futures			2013	10	
IIG_MAINTENANCE	SAge 100 ERP Standard	10/3/2013	SO	0100131-IN	10/3/2013	0.00	0.00	500.00	0.00
		Job Code 500-000-000 Totals -				2.00			9,500.00
		Report Totals -				2.00			9,500.00

Standard Modules and Programs Modified for Service Management

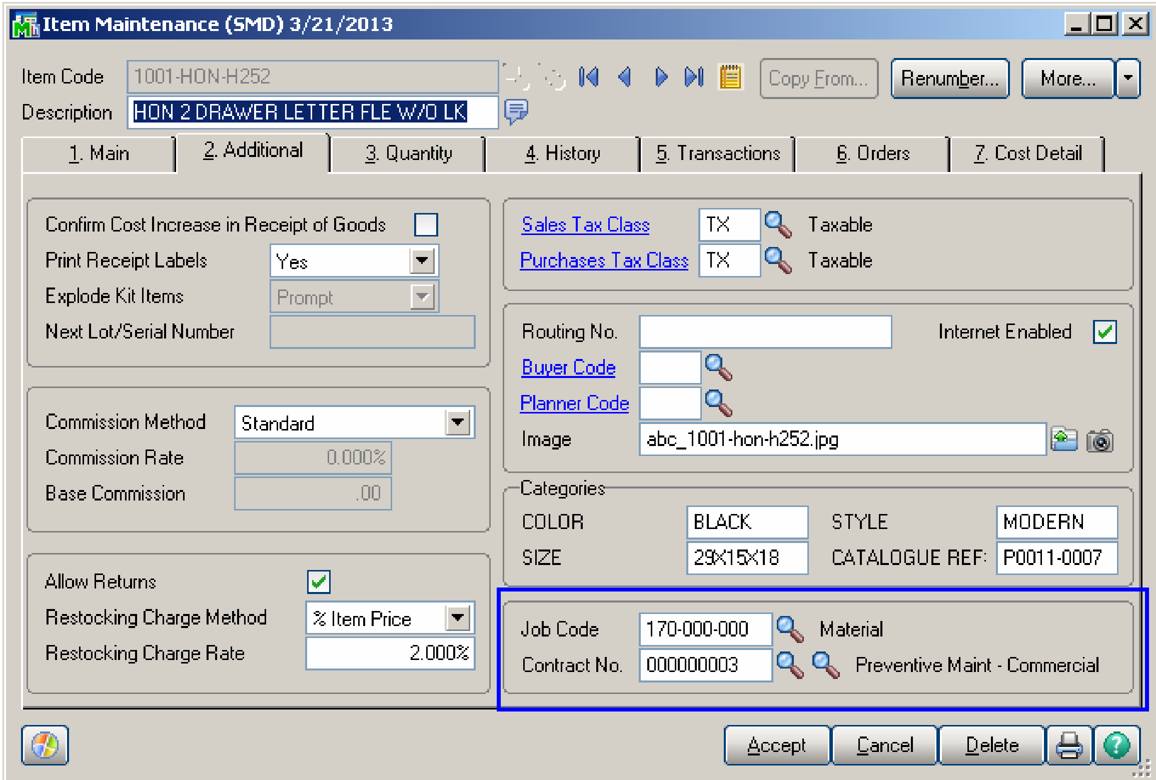
Item Maintenance

The **Track Customer Site Inventory** and **Generate Multiple Contracts** fields have been added to the **Main** tab of the **Item Maintenance** screen.



Check the **Track Customer Site Inventory** box to be able to track the Inventory sold to the Customer when entering item for the task.

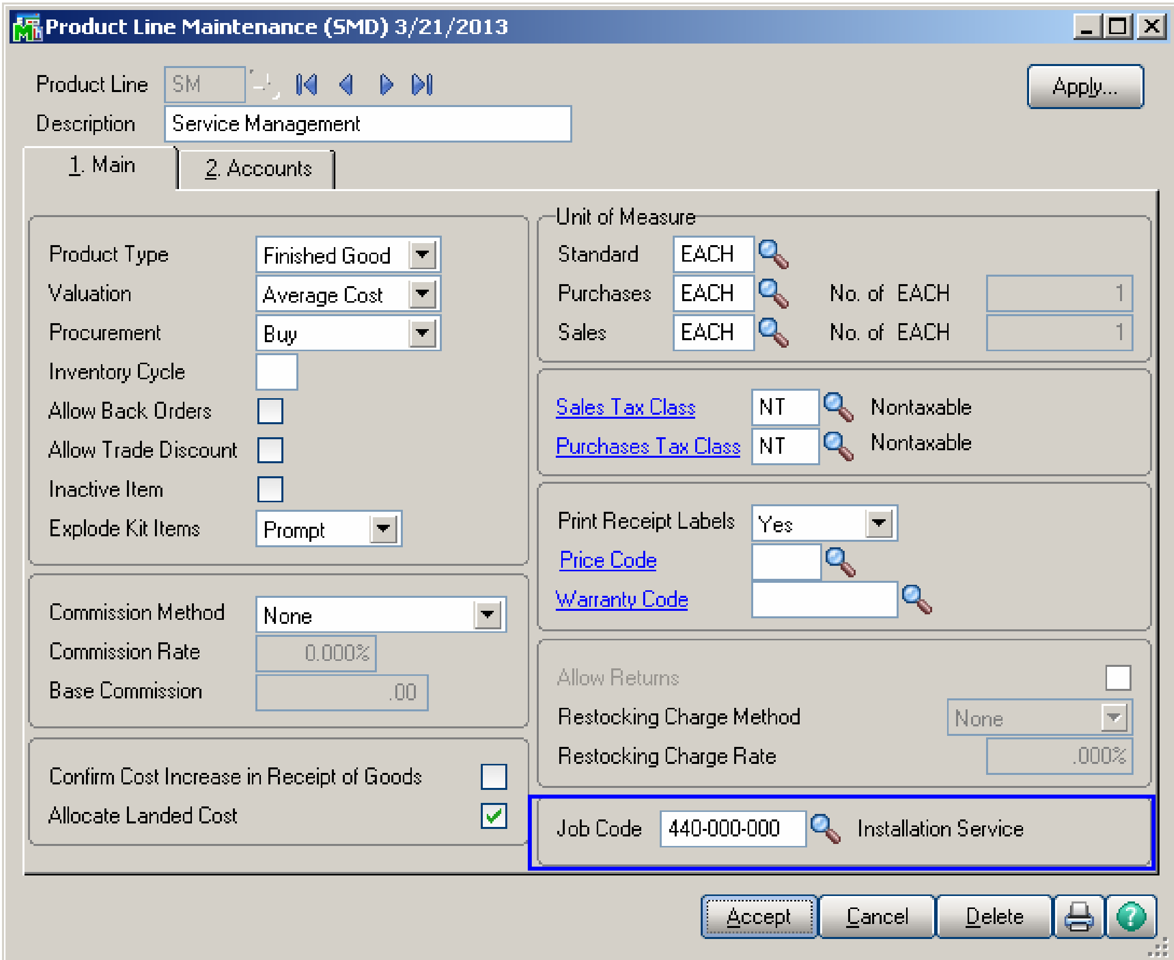
If the **Generate Multiple Contracts** box is selected, use the **Contract No.** field added on the **Additional** tab of the **Item Maintenance** to enter a **Template Contract Number** or select it from the Lookup. Separate contracts will be generated automatically for each unit when selling the item.



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.

Product Line Maintenance

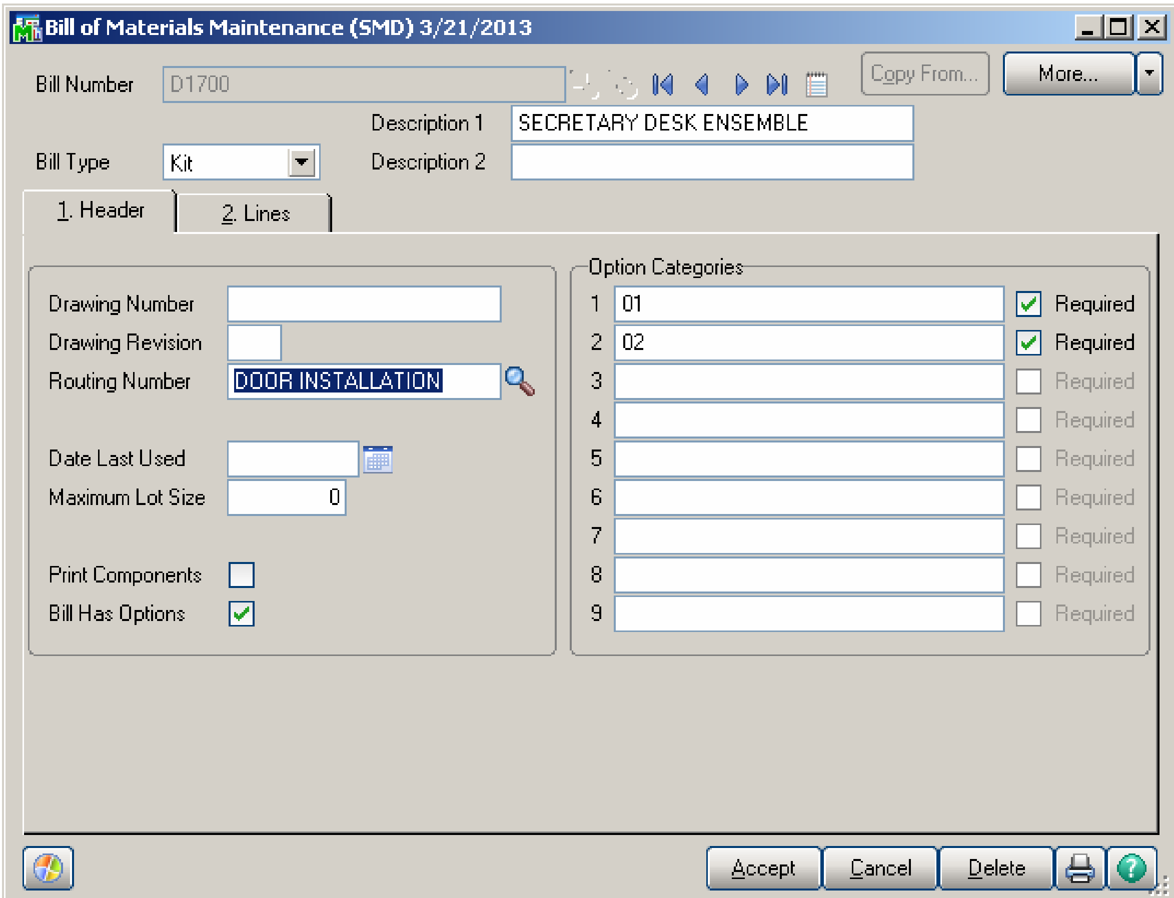
Use the **Job Code** field to enter the desired Job Code for a given product line. Whenever items from this product line will be sold against a contract, appropriate costing and billing information will be posted to the Contract File, organized by Job Code.



The 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

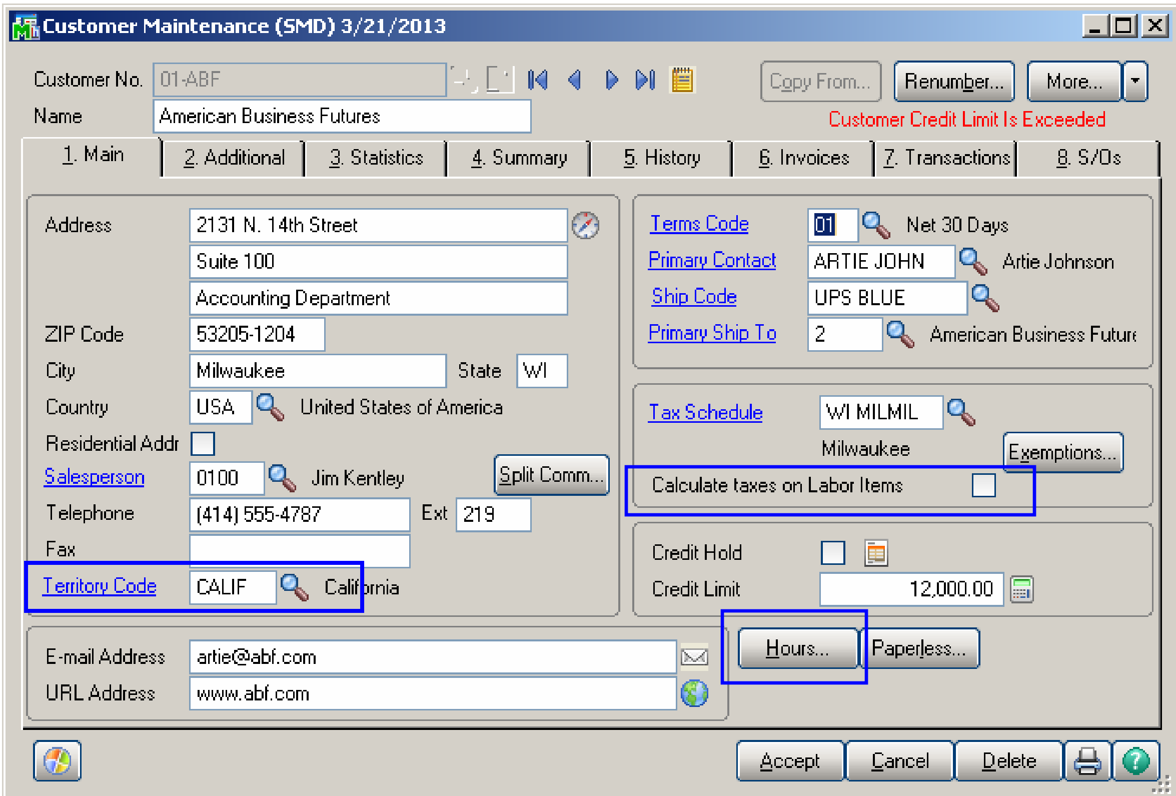
The **Routing Number** is used in the manufacturing/repair/installation of current Bill. The user can enter it manually or select from the Routing Numbers list opened through the Lookup button. The Routing Numbers that are set up in the SM Routing Maintenance will be listed here.



Note: In order to have the WO Routing Numbers listed in the lookup, if the Work Order module is installed; it is necessary to have those Routing Numbers setup also in the SM.

Customer Maintenance

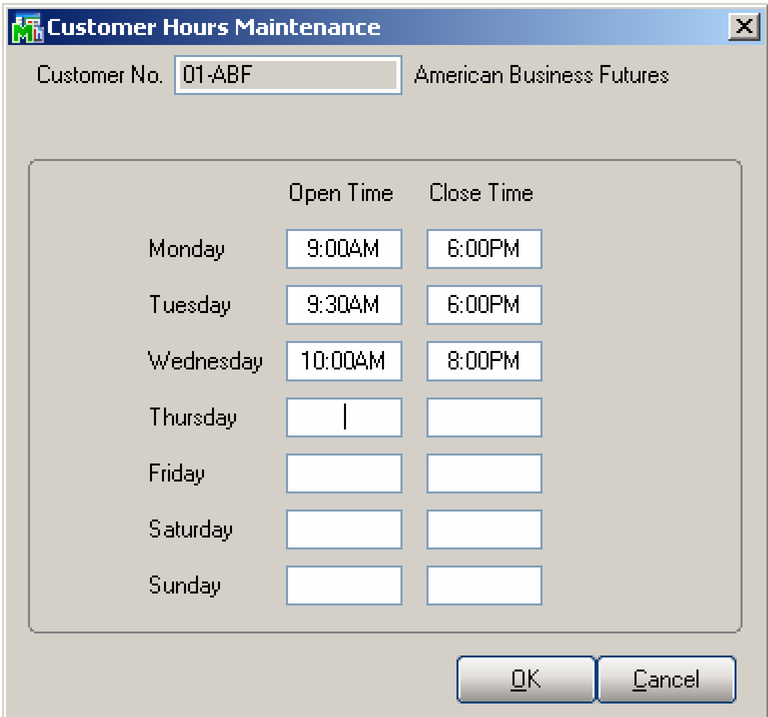
The **Territory Code** field and the **Hours** button have been added under on the **Main** tab of the **Customer Maintenance** screen.

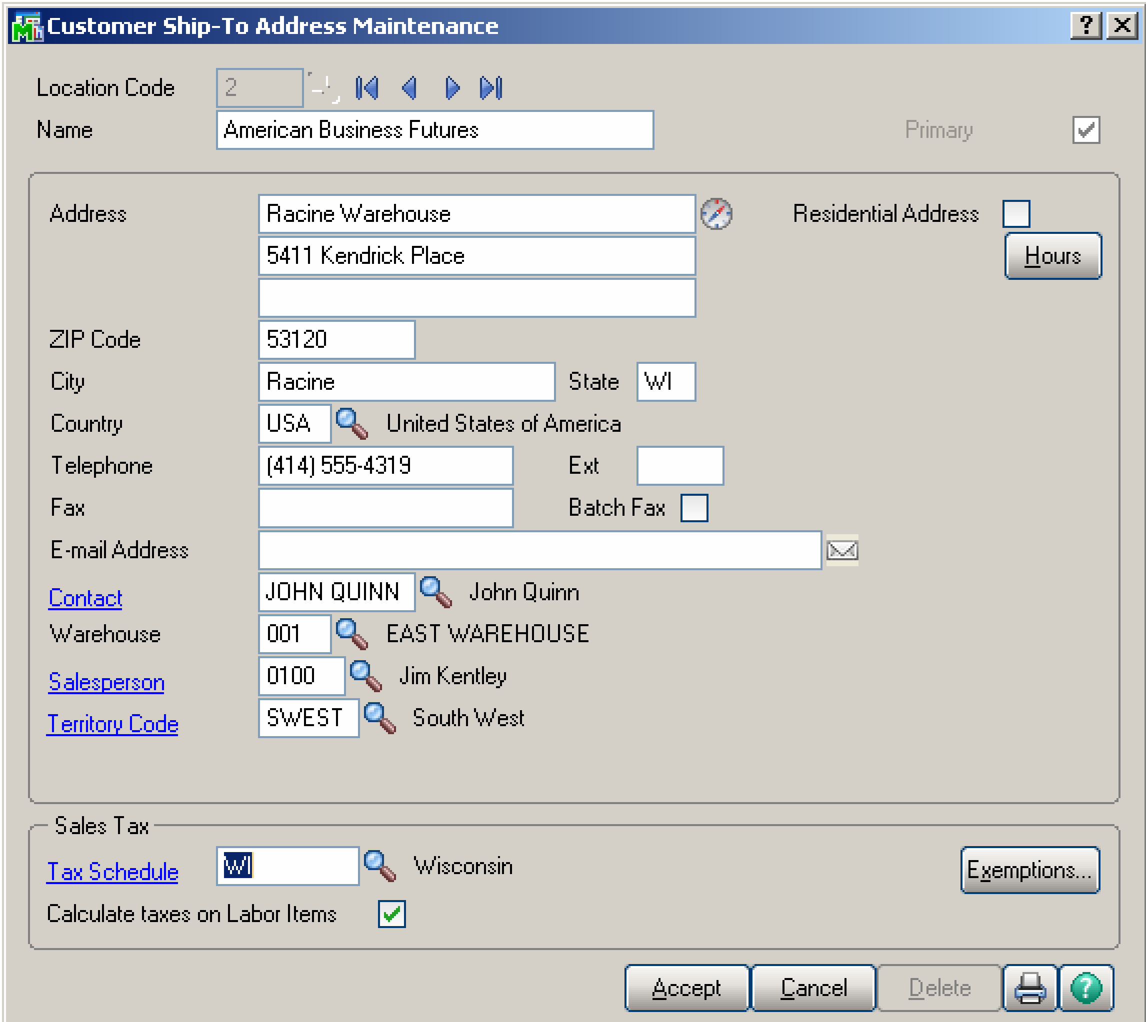


The **Territory Code** can be entered from the **Main** tab when the customer does not have several **Ship To Addresses.** The **Territory Code** also can be entered from the **Customer Ship To Address** portion of the **Customer Maintenance** screen. Together with the **Territory Code** in the **Technician 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 enter the **Customer Ship to Hours** 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**.

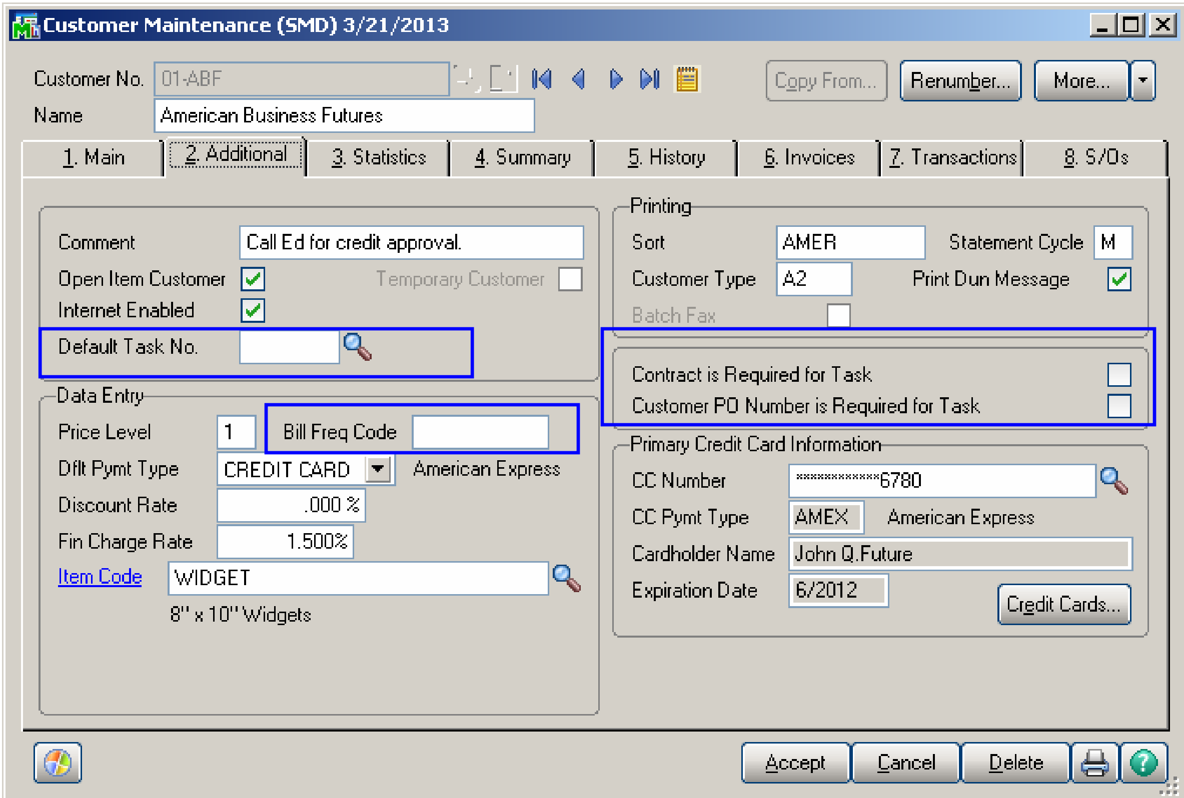




The **Territory Code** field has been added to the **Customer Ship To Address** portion of the **Customer Maintenance** screen. In conjunction with the **Territory Code** in the **Technician Master File**, this code can be used to filter out the tasks that can be dispatched to a given technician.

Use the **Hours** button to enter the **Customer Ship to Hours** 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**.

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 unavailable if the "**Calculate taxes on Labor based on"** option is set to **"None"** in the **S/M options**.



Enter a letter or number for the **Bill Frequency Code** to denote a scheme of Billing Frequency.

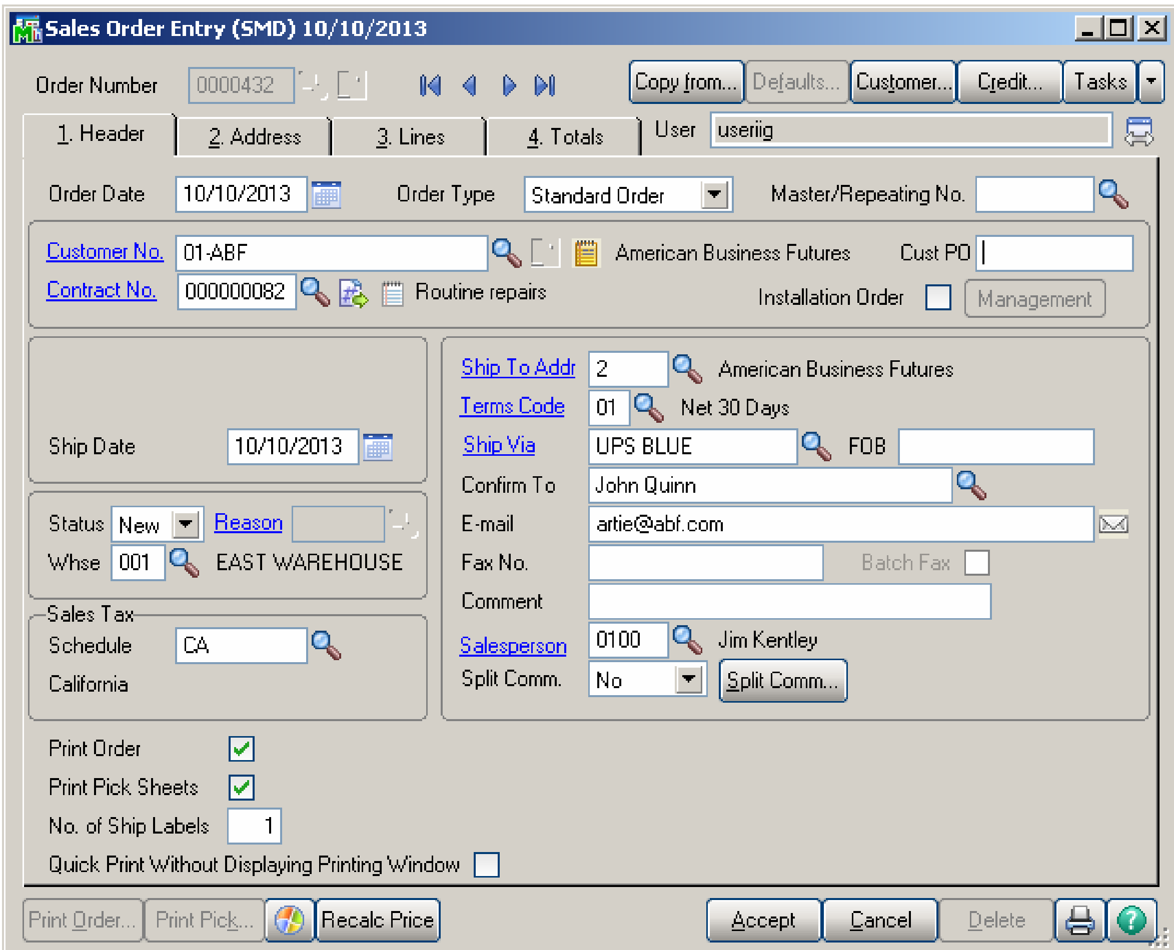
The **Contract** and **Customer PO Number is Required for Task** check boxes have been added to the **Additional** tab of the **Customer Maintenance** screen.

When one of the boxes is checked, the program will not accept Task Entries without **Contract** or **Customer PO** specified, correspondingly.

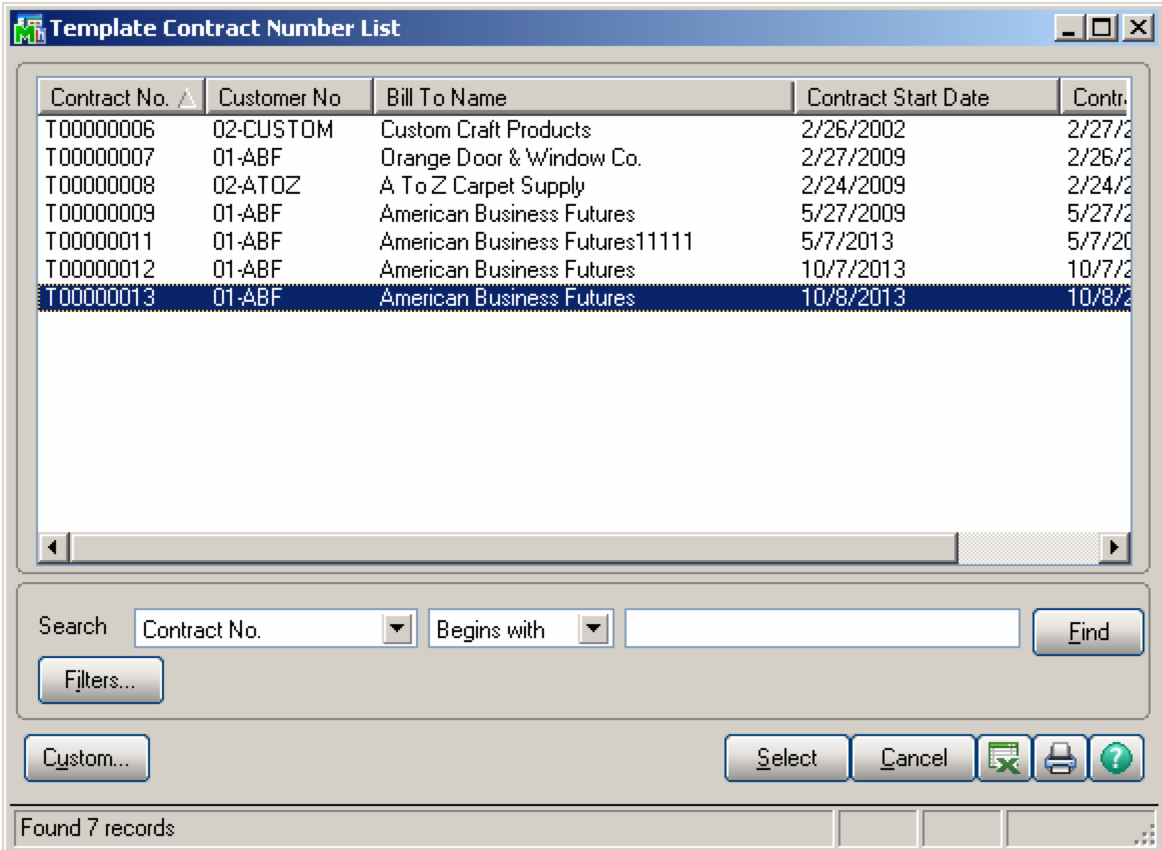
You can select the **Default Task Number** to be displayed automatically when selecting the customer in the **Quick Dispatch Line Entry** program.

Sales Order Entry

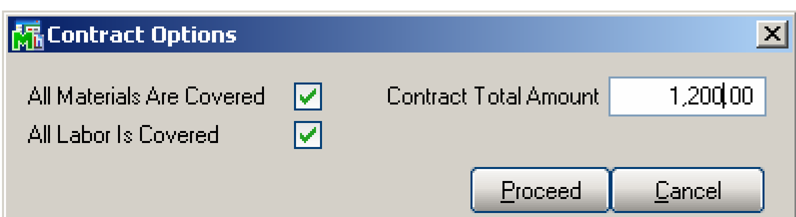
Here are the changes on the **Sales Order Entry** screen.
Use the **Contract No.** field to enter a **Contract Number** in order to sell items against that contract. Any existing contract can be selected using the **Lookup** button (the Template contracts are not displayed in the lookup).



You can also create a new contract based on a template Contract clicking the **Next Contract No.** button.

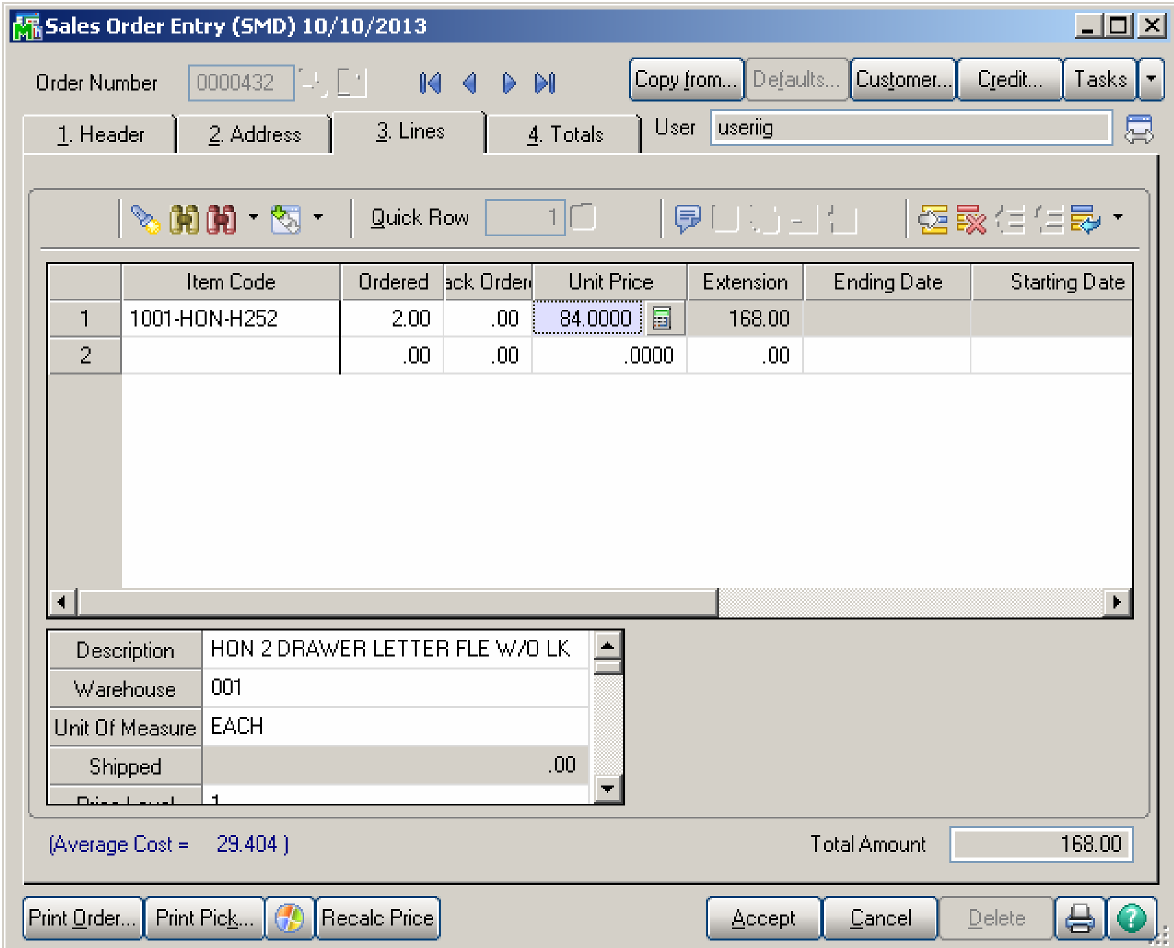


The **Contract Options** screen is opened to allow setting the **All Materials Are Covered**, **All Labor Is Covered** options and enter **Contract Total Amount**.



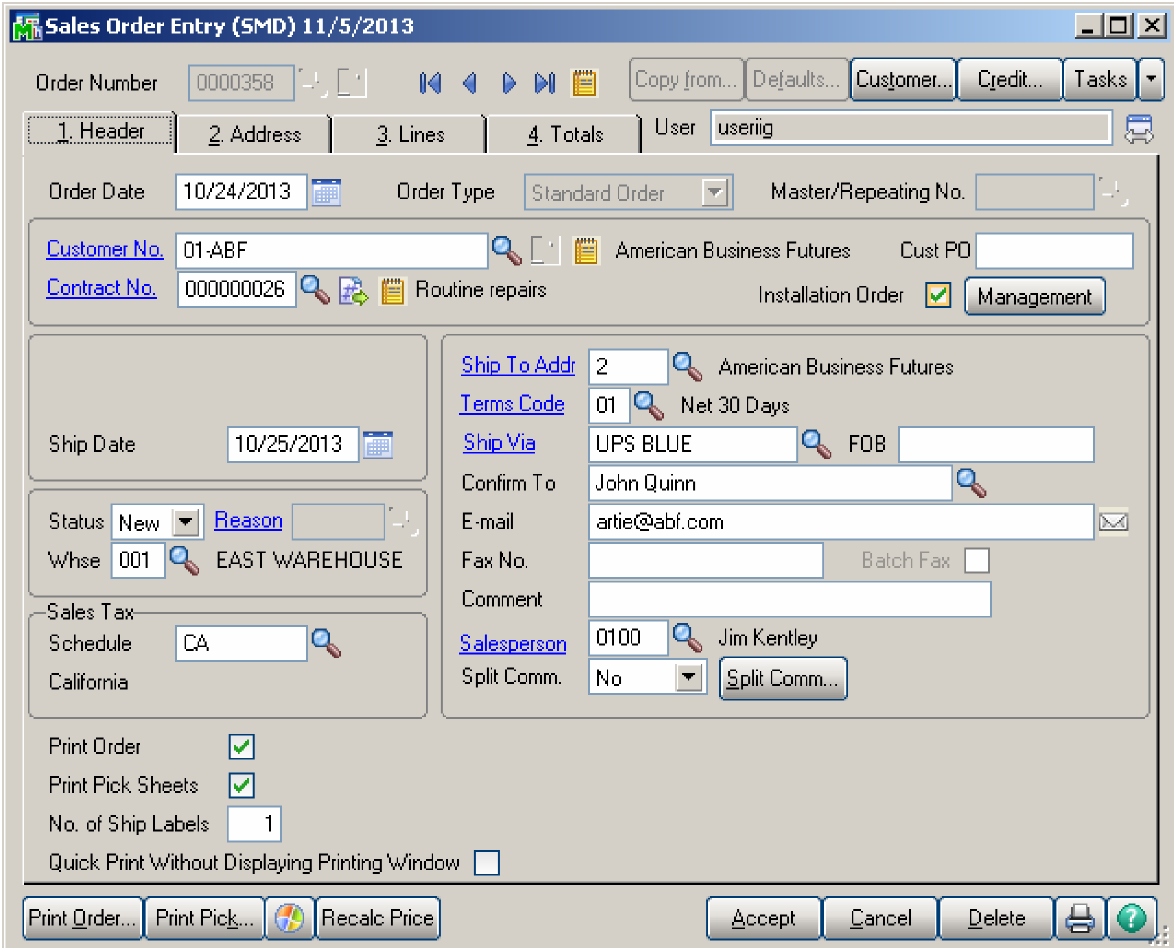
Note that attached contract can be changed for each item separately. If the **Item contract instead of Order Contract** box is checked in the **Service Management Options** program, items generating tasks will have attached contracts specified for them in the **Inventory Maintenance** program.

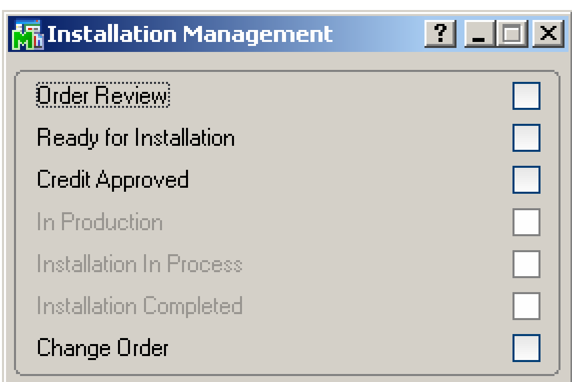
Select a line on the **Lines** tab of the **Sales Order Entry** screen. Click in the **Unit Price** field to see the **Average Cost** information in the status line at the bottom of the screen.



Installation Order Management

The **Installation Order** checkbox added on the Header tab of Sales Order Entry allows for enabling 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:





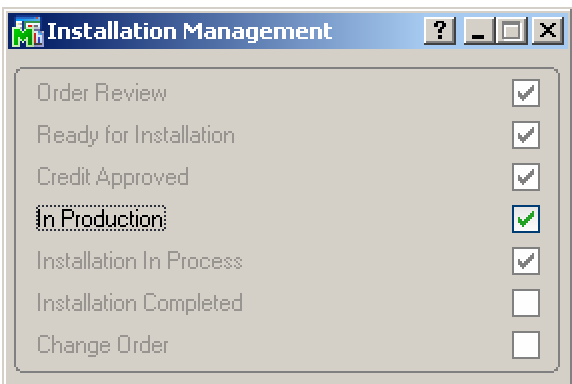
Some of these checkboxes are set automatically.

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.
The following message appears upon selecting a Sales Order for which Production Task has been generated:

All checkboxes except of **In Production** (if the user has respective security enabled in the Role Maintenance) in the Installation Management screen become disabled:



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.

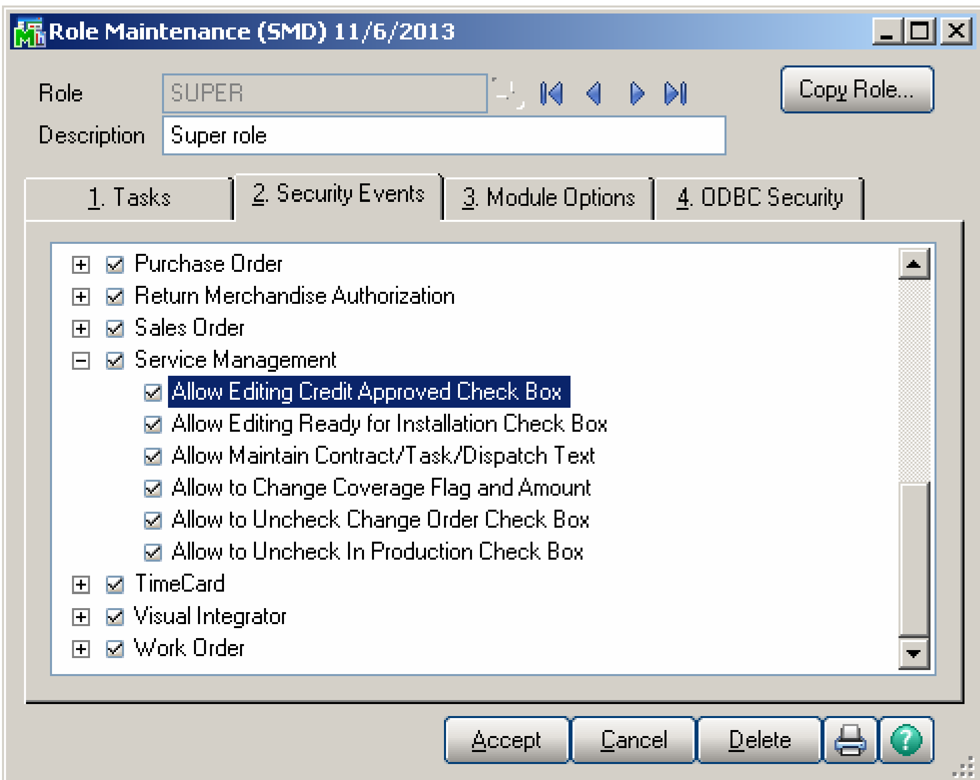
Change Order – this flag is automatically set when changes are made to any of the following information on the order:

- 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.

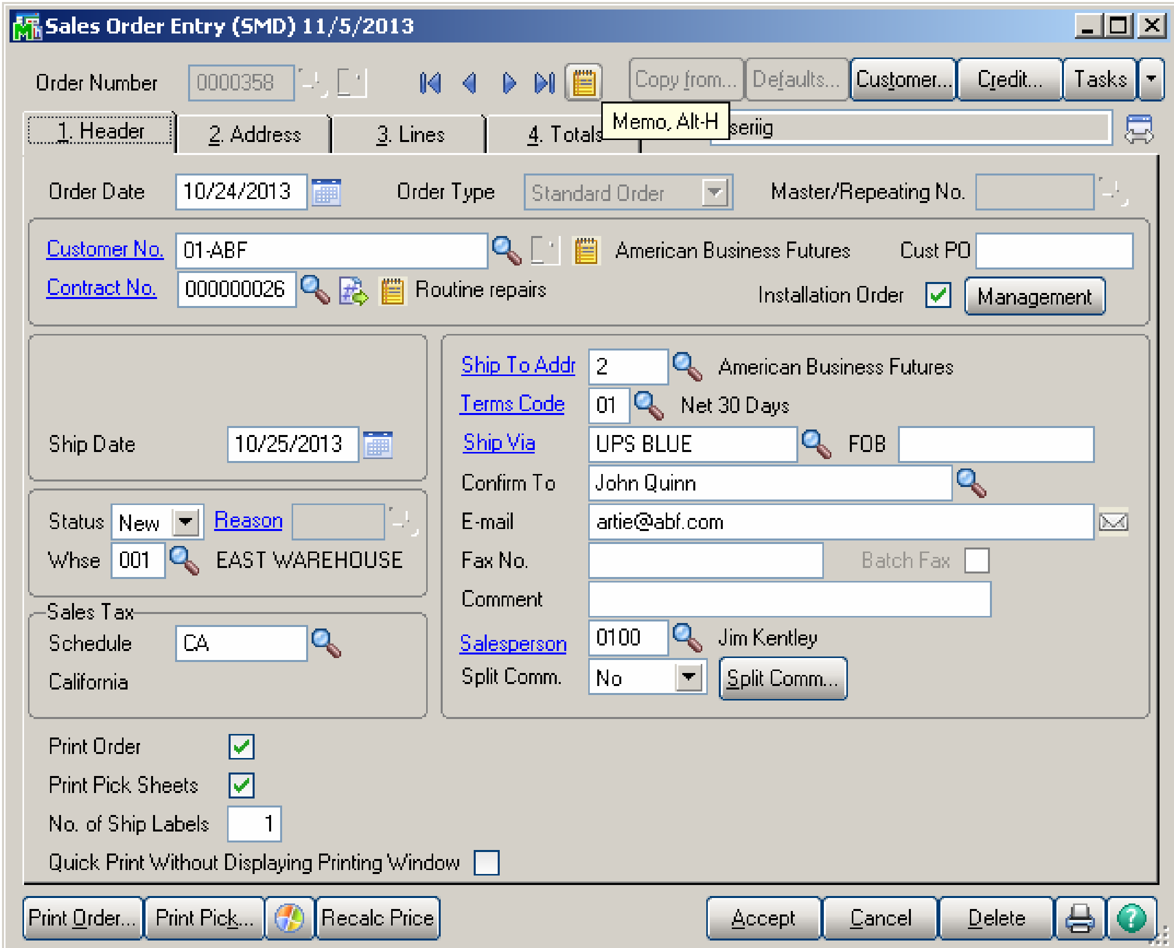
The **Ready for Installation**, **Change Order** and **In Production** settings are also role based and only authorized users are allowed changing these options manually:

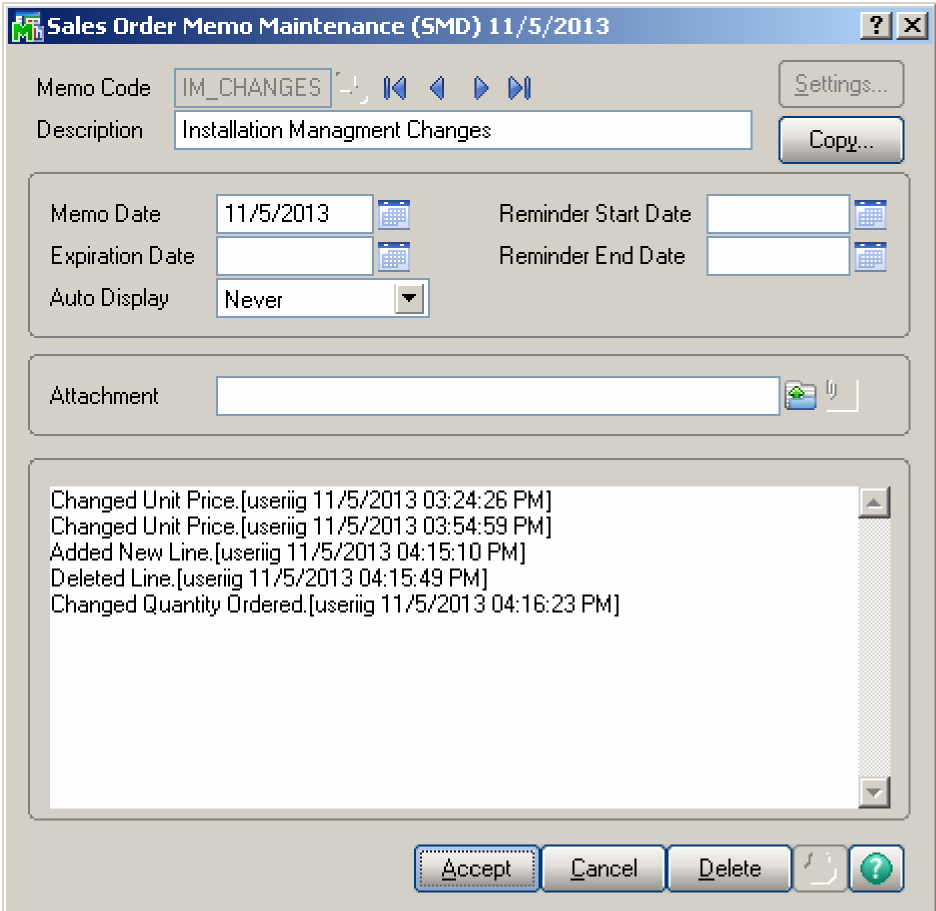


The Installation Task cannot be dispatched if the **Order Review, Credit Approved** and **Ready for Installation** flags are not set.

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.


Sales Order Entry (SMD) 11/5/2013
Order Number
0000358
Copy from...
Defaults...
Customer...
Credit...
Tasks
1. Header
2. Address
3. Lines
4. Totals
Memo, Alt-H
seriig
Order Date
10/24/2013
Order Type
Standard Order
Master/Repeating No.
Customer No.
01-ABF
American Business Futures
Cust PO
Contract No.
000000026
Routine repairs
Installation Order
Management
Ship Date
10/25/2013
Status
New
Reason
Whse
001
EAST WAREHOUSE
Sales Tax
Schedule
CA
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
artie@abf.com
Fax No.
Batch Fax
Comment
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
Print Order...
Print Pick...
Recalc Price
Accept
Cancel
Delete



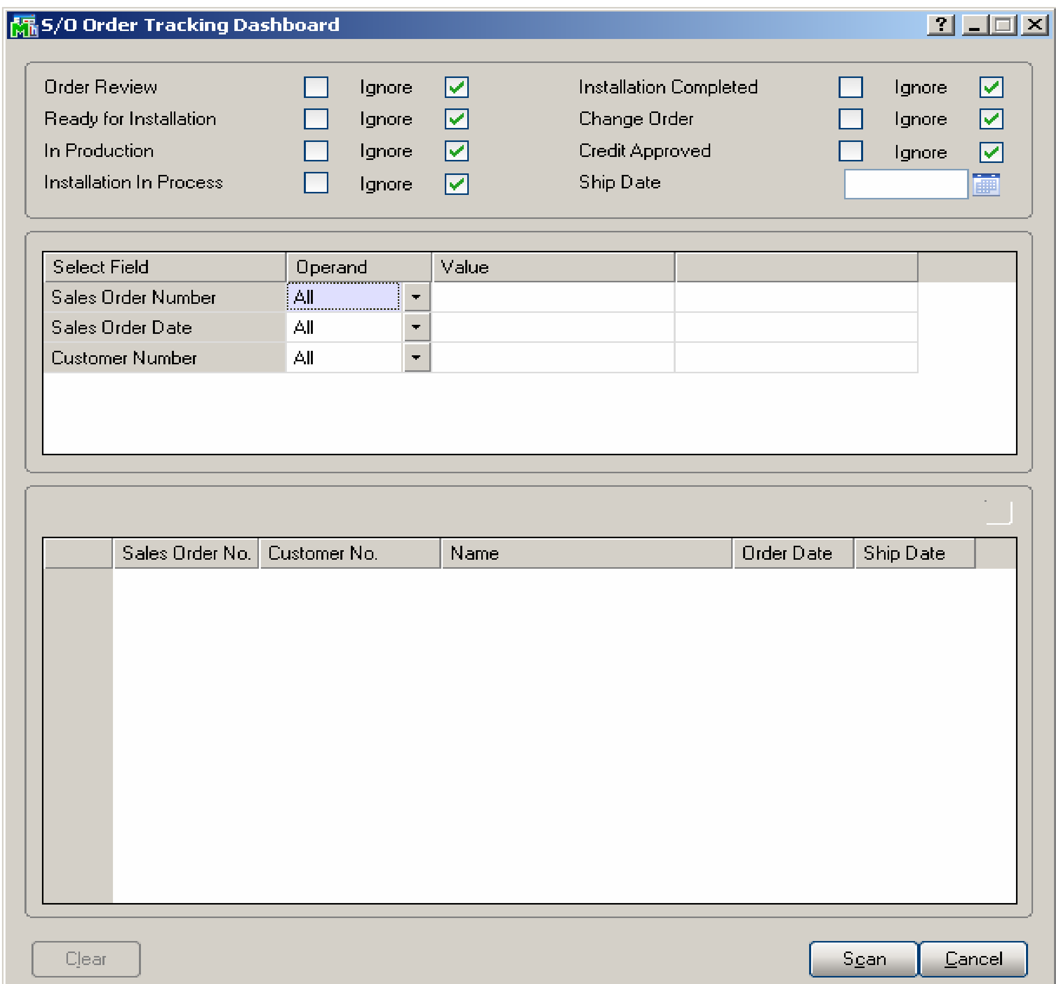
New stamped comments are added in the following cases:

- 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**

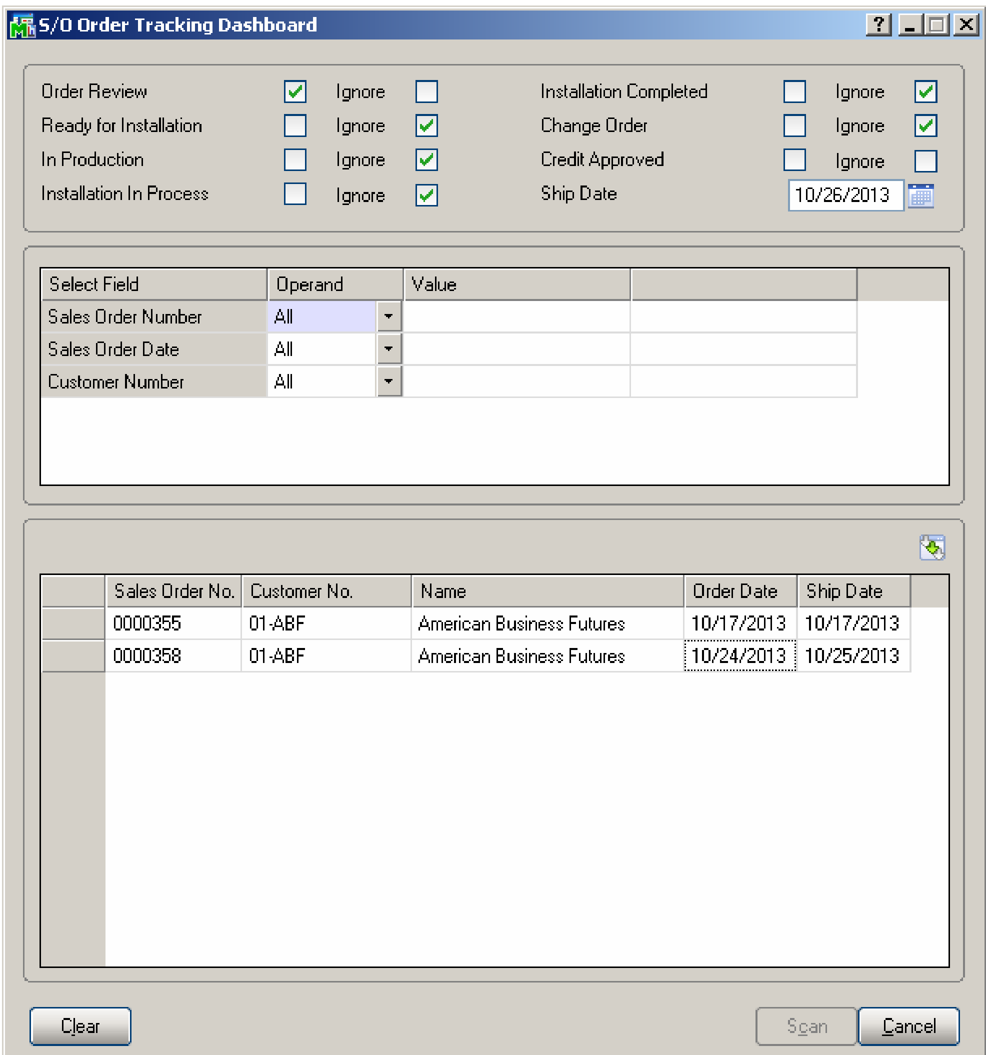


By this program the user can view:

- 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:

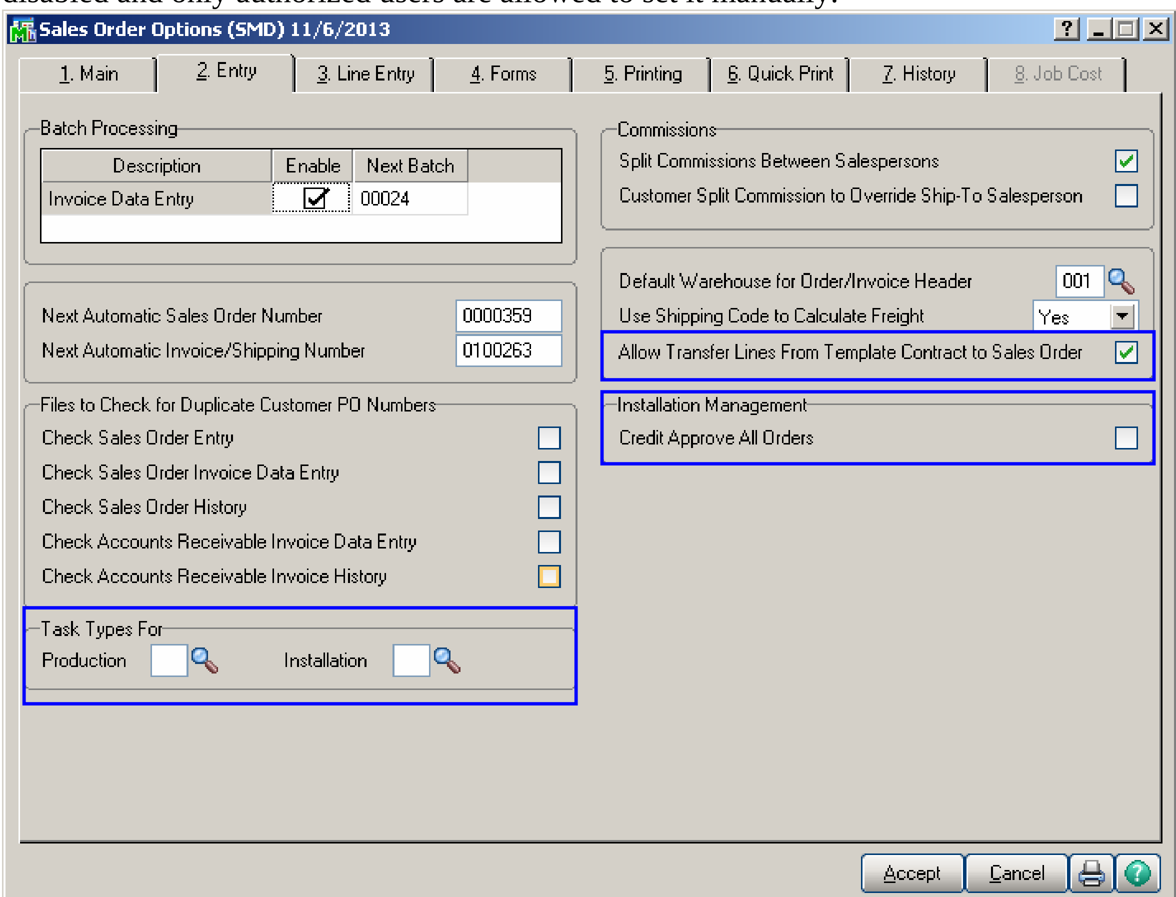


In our example the program loaded only the Orders, which are Reviewed and have a Ship Date past the Ship Date: 10/26/2013 specified on the screen. All other checkboxes have been ignored.
The Zoom button allows the user to open the selected Sales Order.

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.

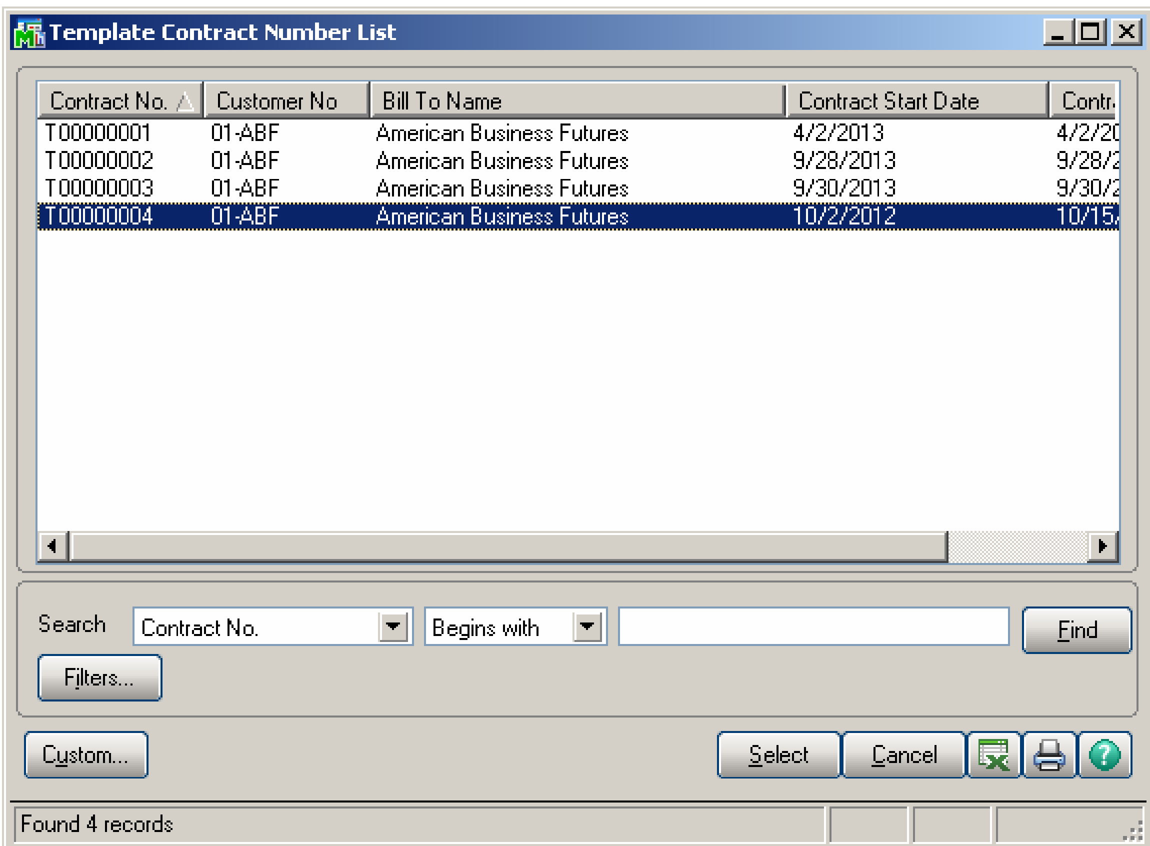
Credit Approve All Orders – this option is intended for Sales Order Installation Management. If checked, the **Credit Approved** flag in the Installation Management screen is automatically set while accepting an Order entered for the Customer with Credit Hold flag turned off in the Customer Maintenance.
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.

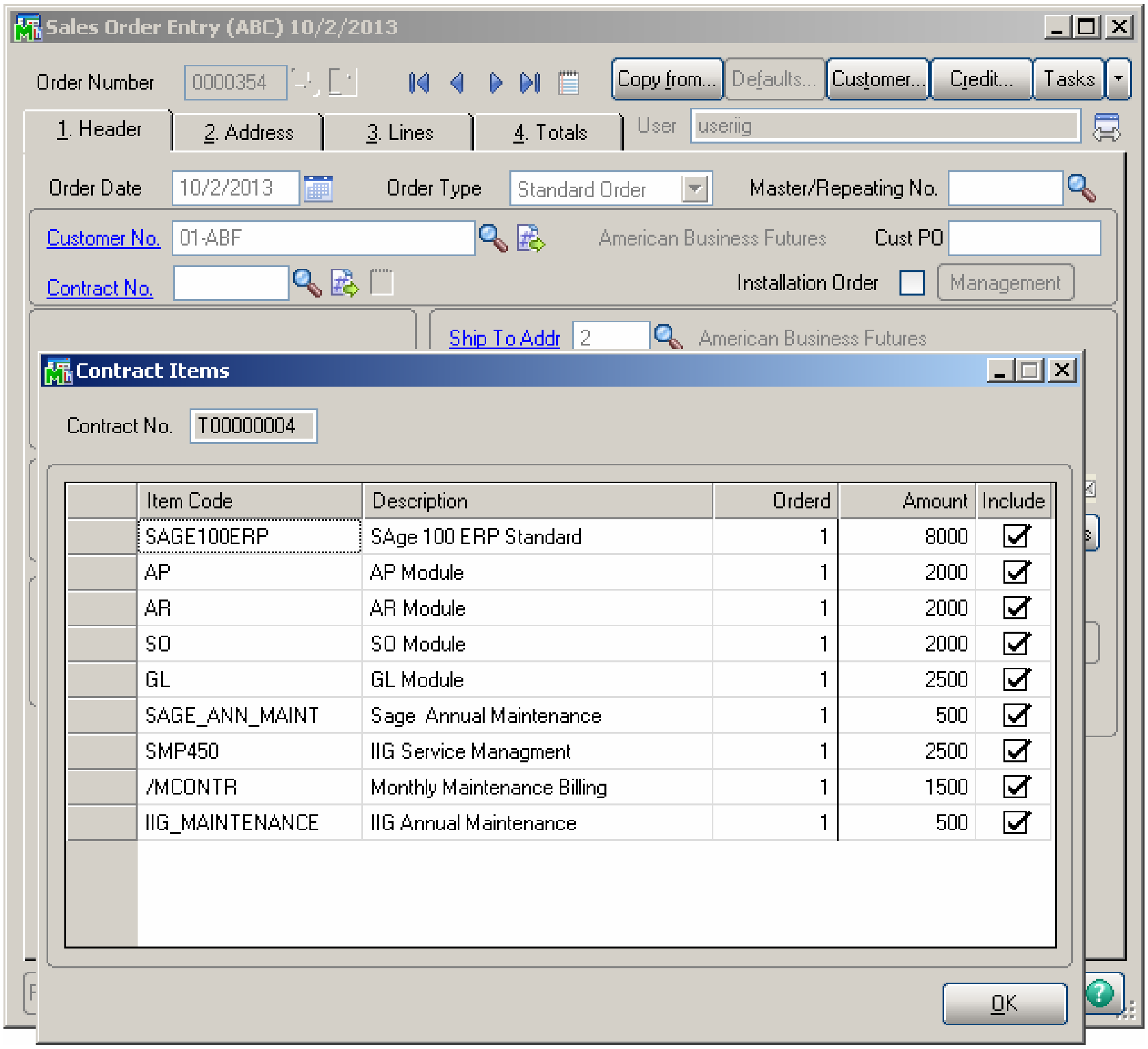


The **Task Types for** options allow specifying Task types to be used when generating Task for Sales Order Header.

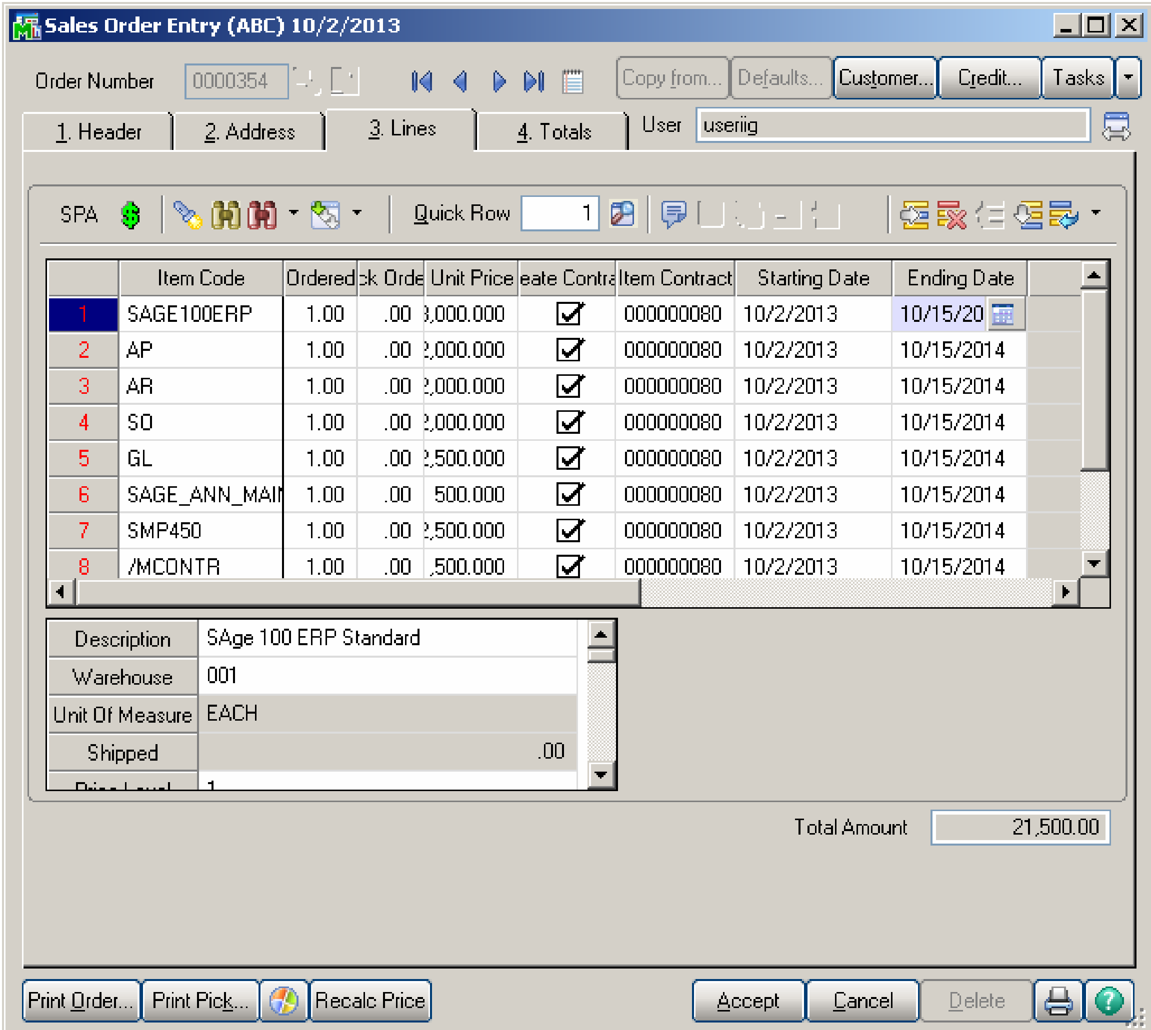
Creating Sales Order Based on Template Contract

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:





All the lines marked as **Included** are loaded in the Sales Order lines with respective quantity Ordered and Amount:

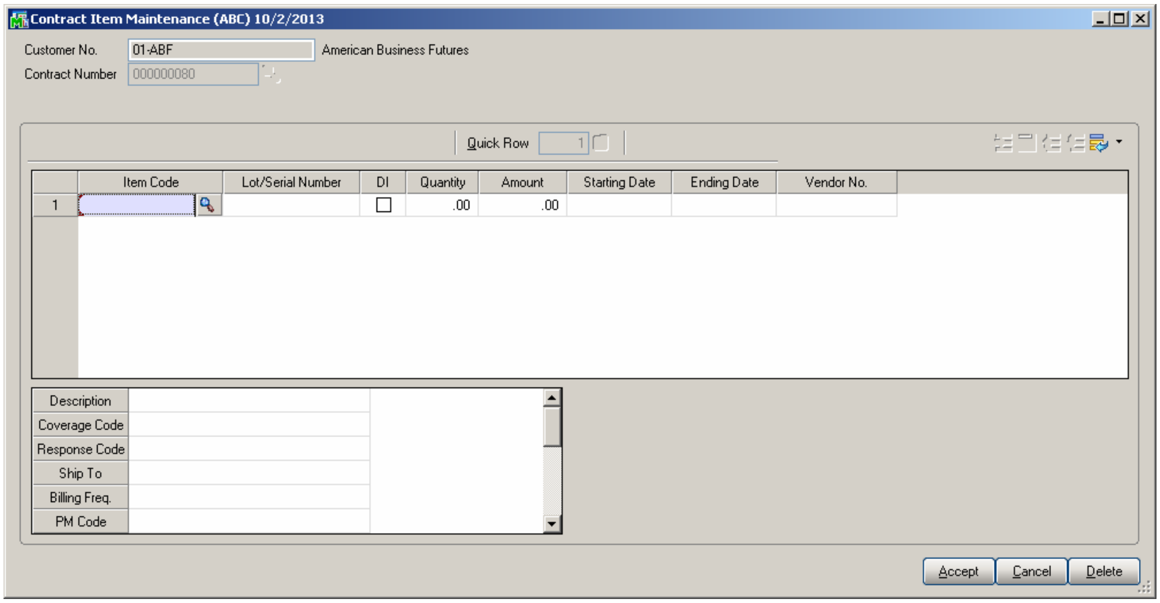


The **Starting Date** and **Ending Date** for each Sales Order line Item is calculated based on the Order Date and the Starting-Ending dates interval from Template Contract. So if the Contract duration for an Item was 1 year in the Template Contract the Starting- Ending Dates in the Sales Order will be set so that to have the same 1 year duration. In our example the Starting Date in the Template Contract was 10/02/2012 and ending Date was 10/15/2013. After the line is loaded in the Sales Order its Starting Date is set equal to Order Date: 10/02/2013 and the Ending Date is calculated as Starting Date (10/02/2013) + 378 days= 10/15/2014.

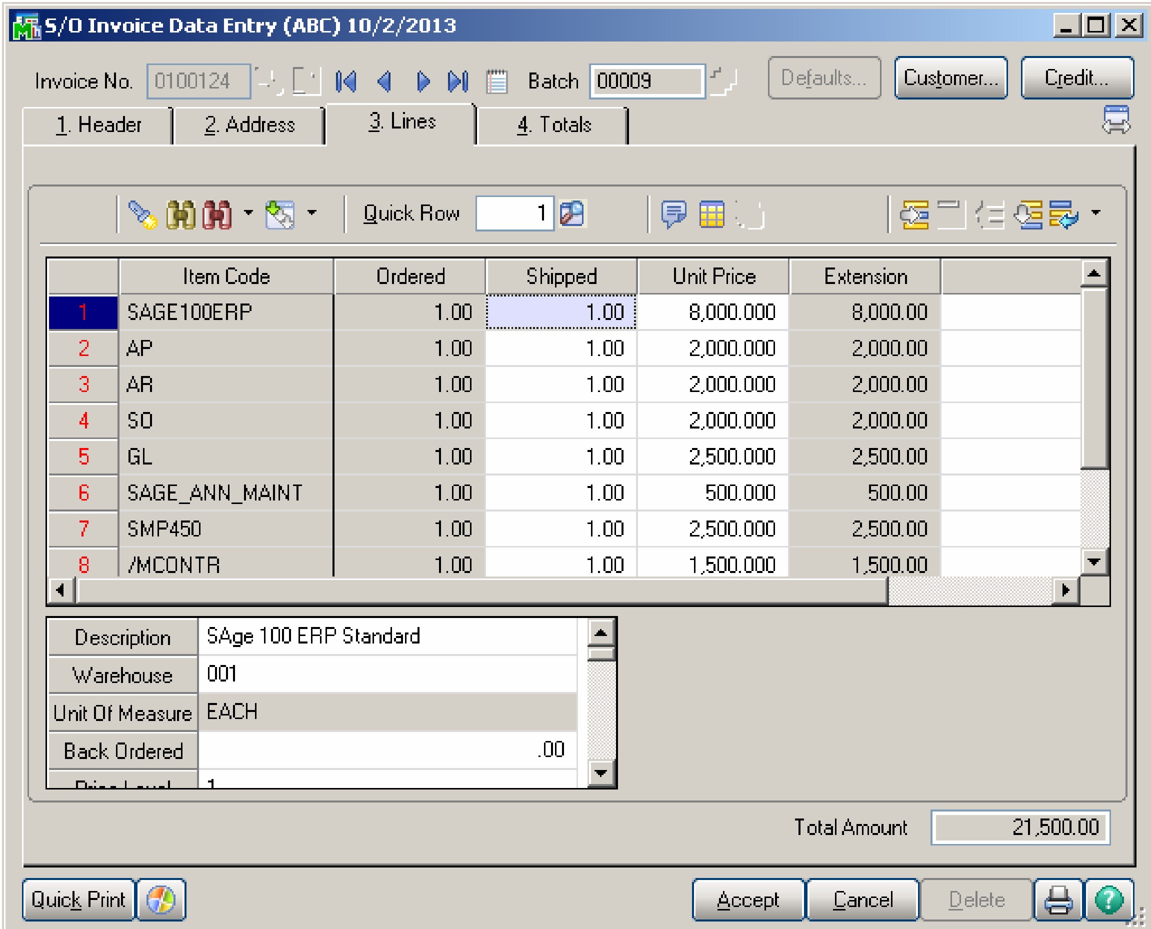
The Header Contract is set as default for lines Item Contract field. The **Create Contract** check box allows for transferring lines into the Contract Items Maintenance during Daily Sales Update.

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.

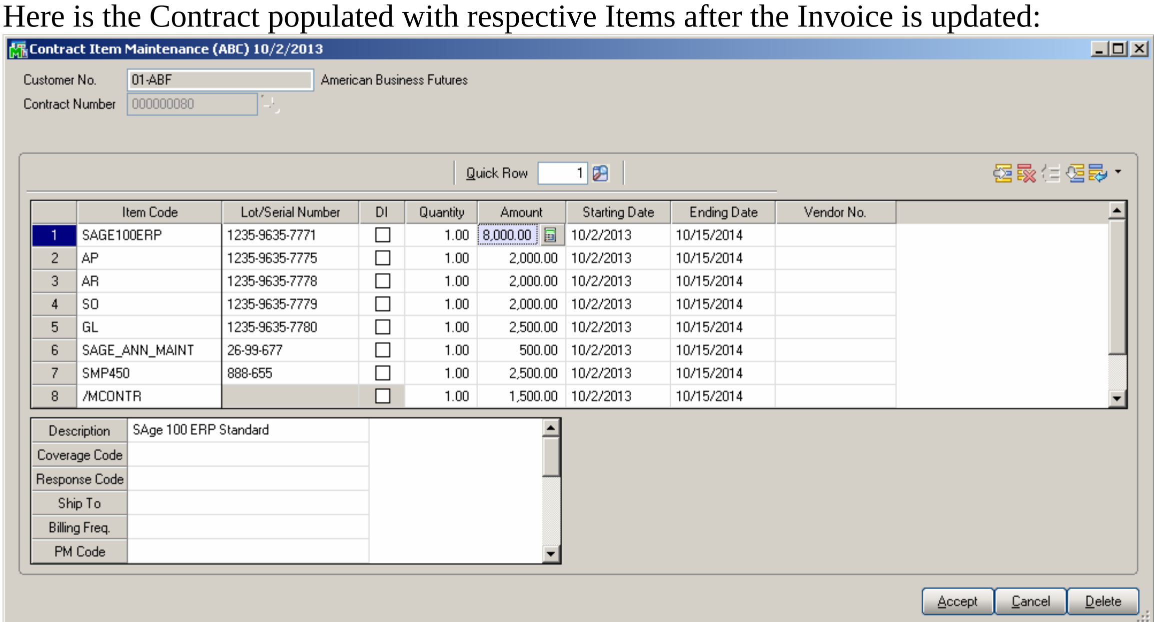
Here is the Contract items grid for the Contract created while entering the Sales Order:



There are no Contract items.



Here is the Contract populated with respective Items after the Invoice is updated:



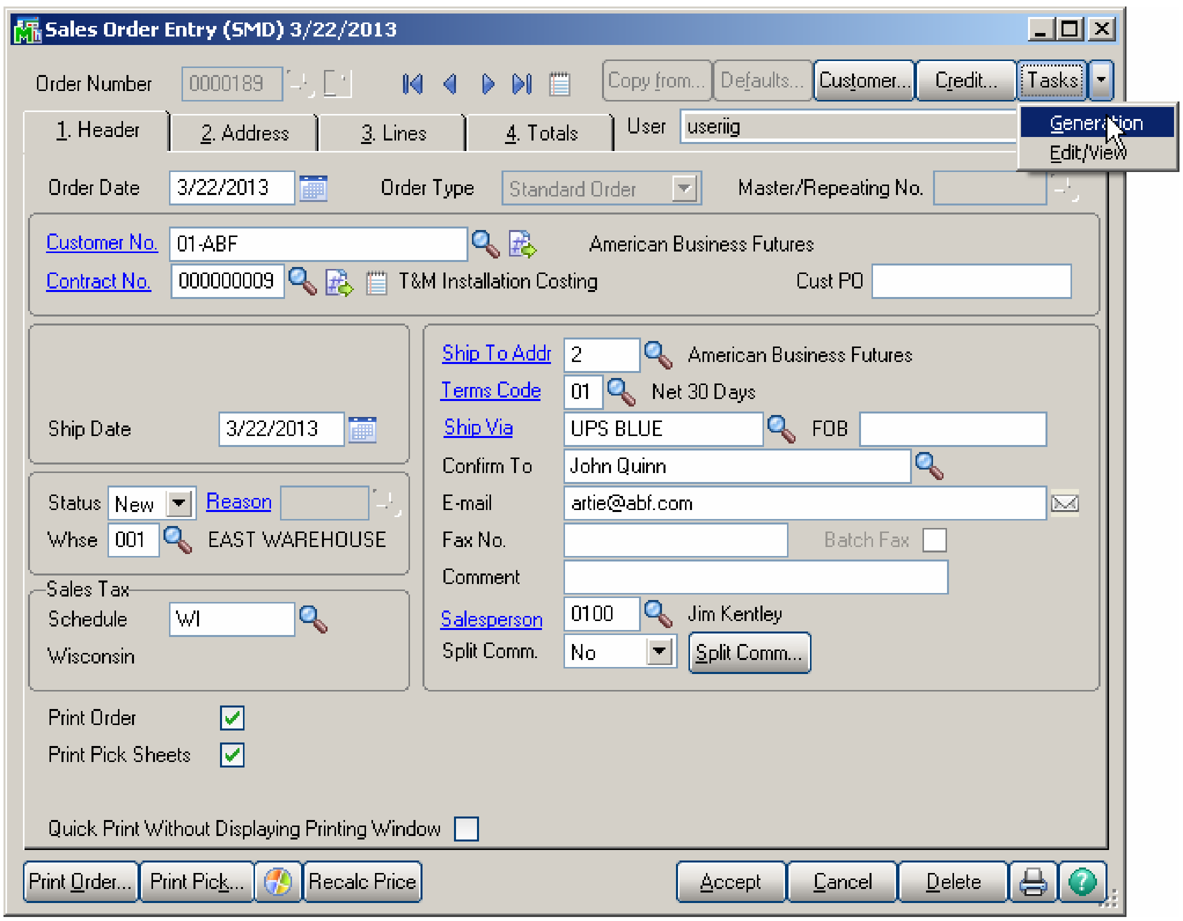
Task Generation from Sales Order

There are the following options of generating Tasks from Sales Order:

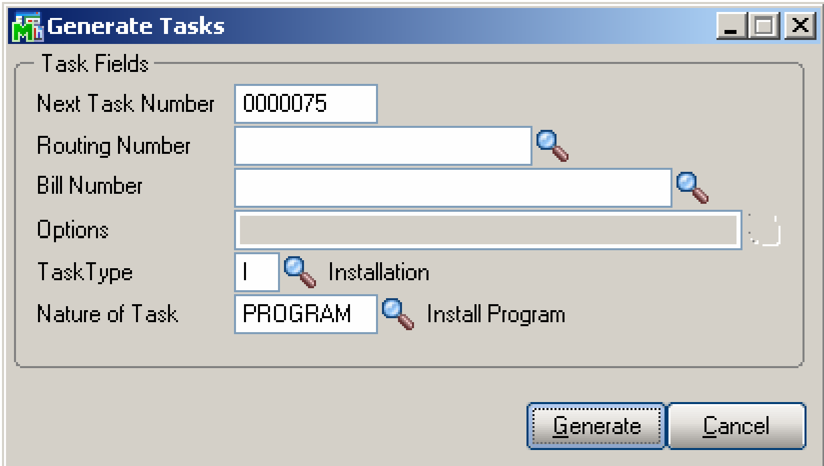
- ➢ Generate Task from Sales Order header by the Generate button under the Tasks menu button.

- ➢ Generate a Task (s) from Sales Order line for, Special, Misc. Items and for a Bill Item

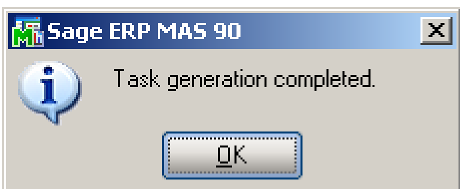
Press the Generation button to generate a Task for Sales Order Header.



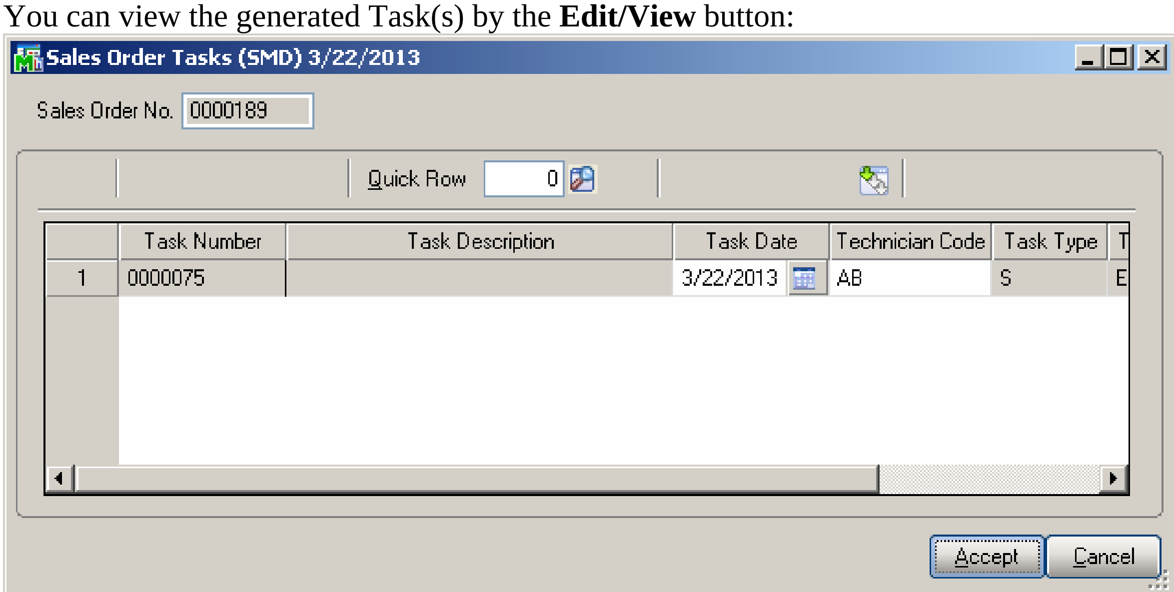
The Generate Tasks screen is opened. When generating Task for Sales Order Header the Routing and Bill Number fields can be left blank. If the **Routing Number** is specified, tasks will be generated for those steps of that routing, which have the **Generate Task** checked in the **Routing Maintenance**.



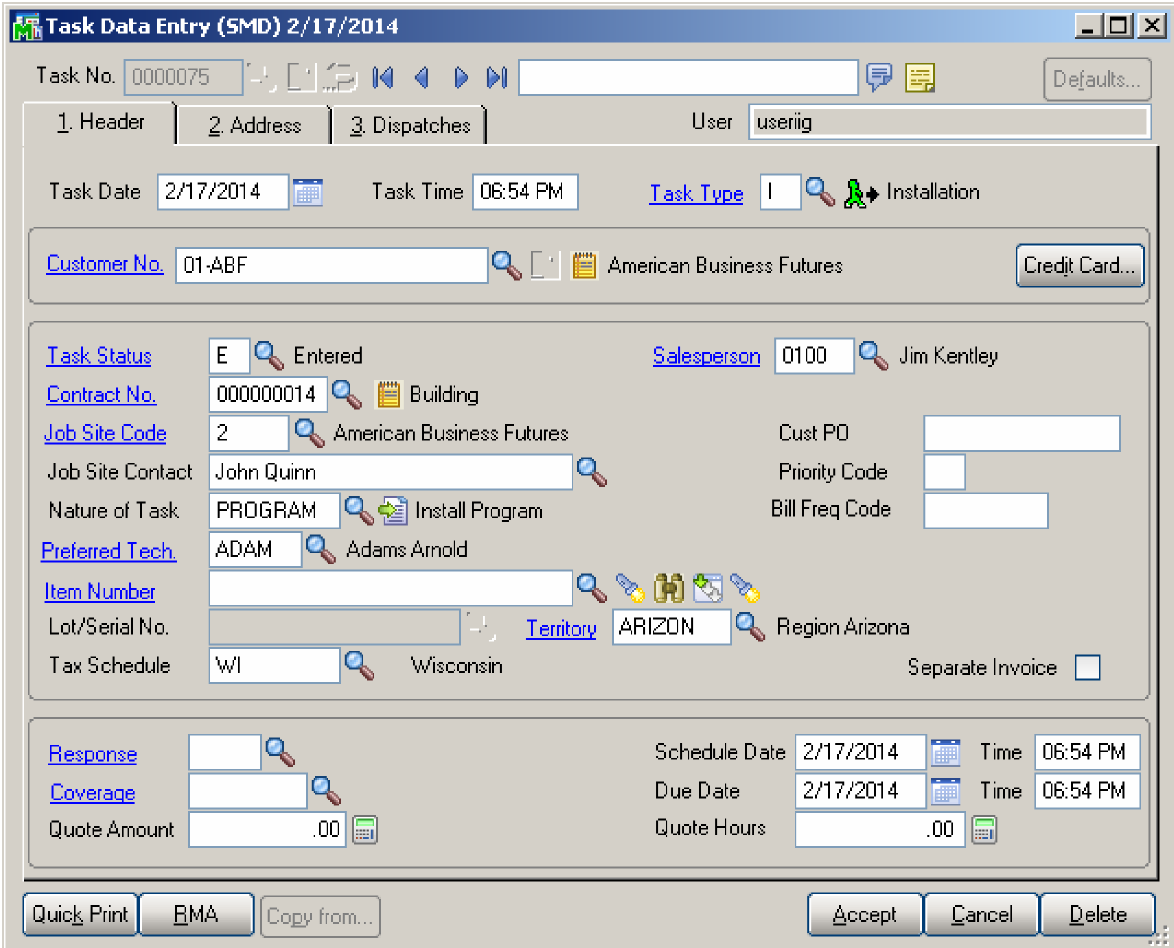
Press Generate button:



You can view the generated Task(s) by the **Edit/View** button:



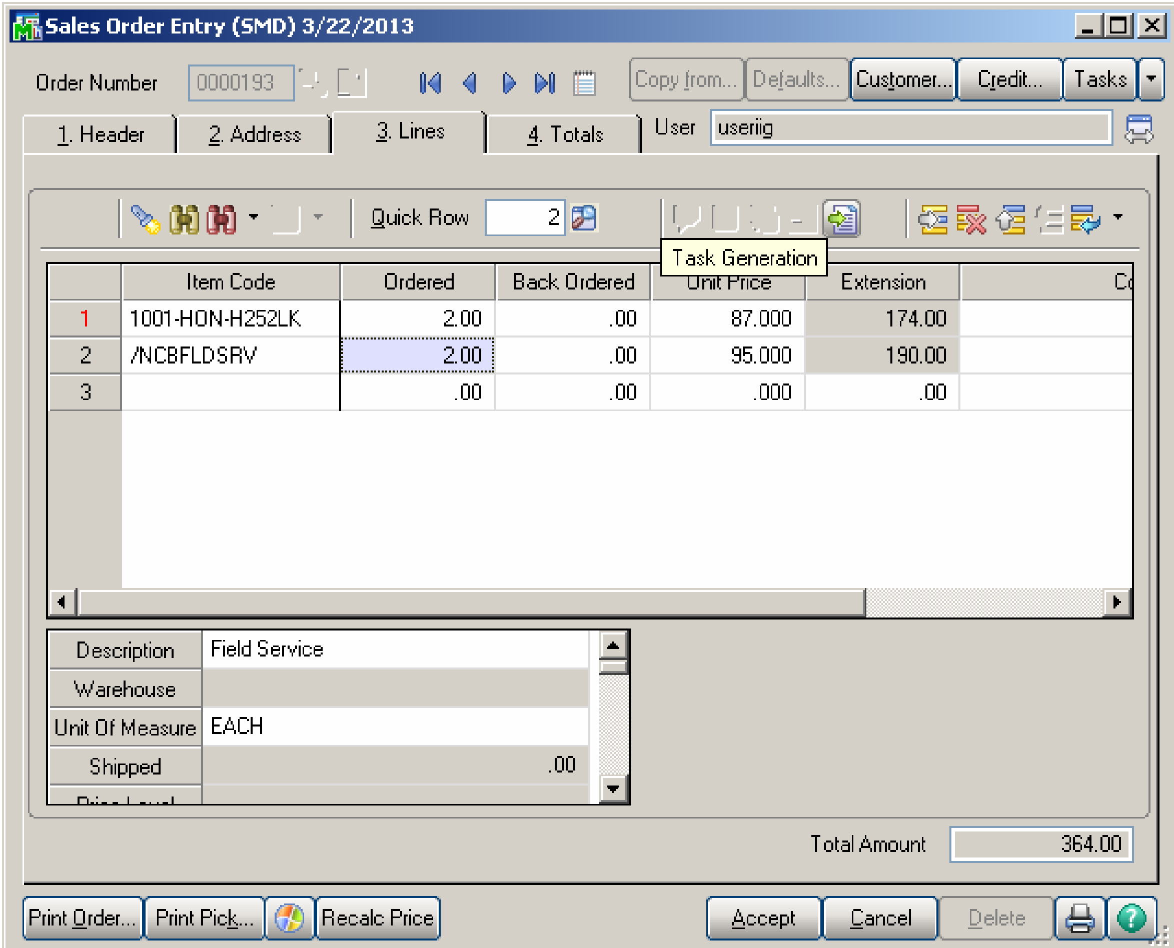
There is an option to drill down to Task Data Entry:



Once a task has been generated for Sales Order Header the user will not be able to generate another Task.

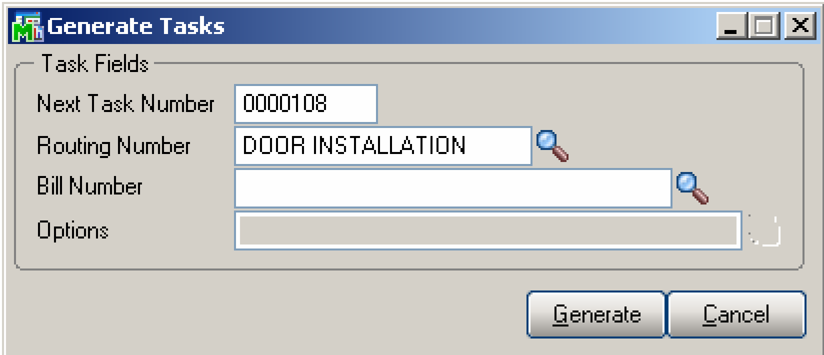
On the **Lines** tab, tasks can be generated only for order lines with miscellaneous, special and Bill items.
The **Task Generation** button is enabled only if the selected line contains Misc Item, Special Item or Bill Item.

1. Generating task for Misc or Special Item

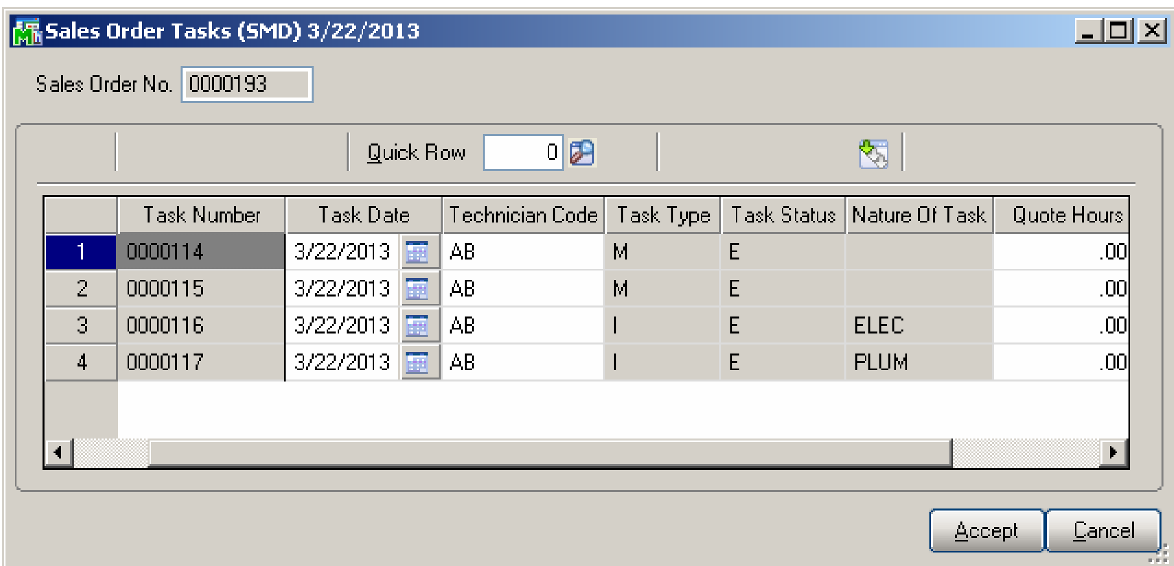


Press the **Task Generation** button to open the Generate Tasks screen. The Routing Number or Bill Number is required when Task is generated from SO line.

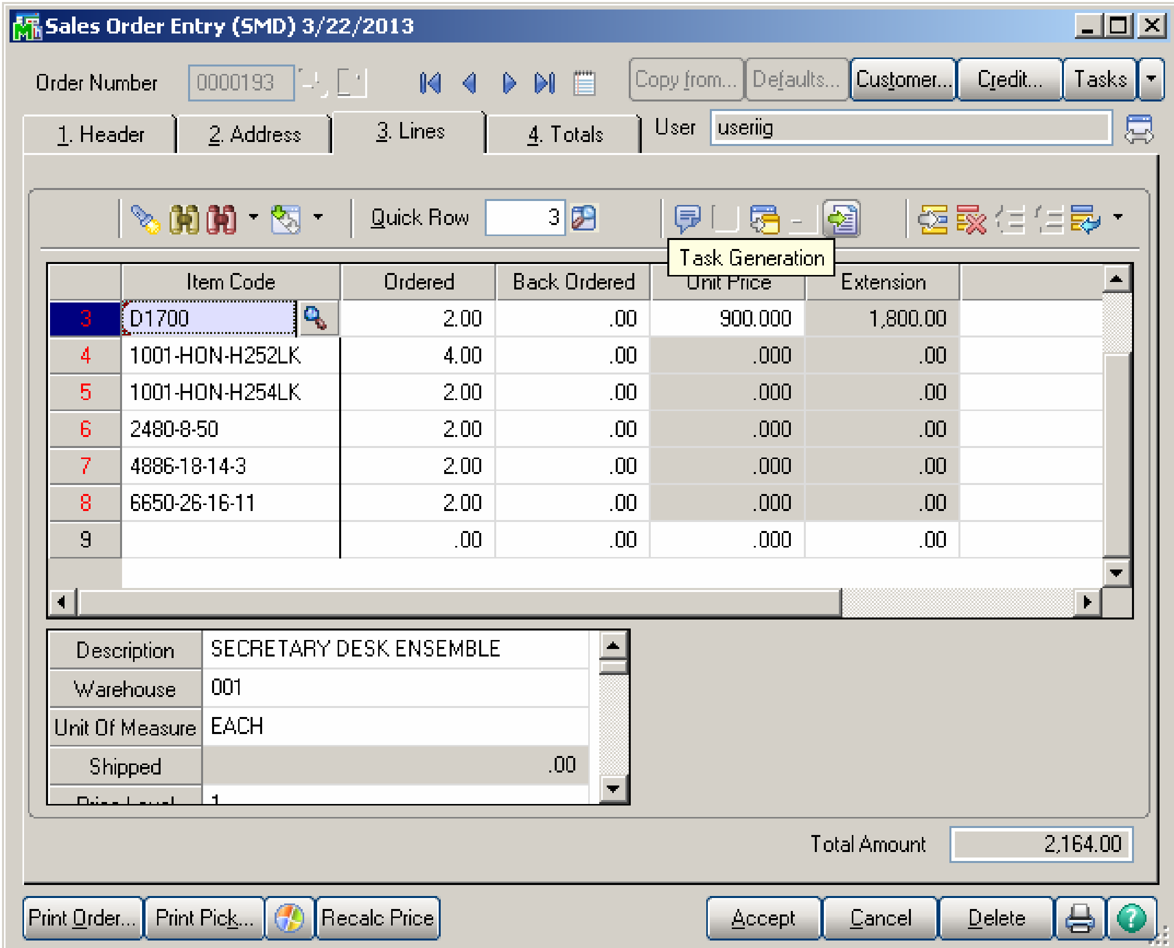
Select a Routing Number or a Bill Number:



When the **Routing Number** is specified, tasks are generated for those steps of that routing, which have the **Generate Task** checked in the **Routing Maintenance**.
Here are the Tasks generated for the selected Routing number:

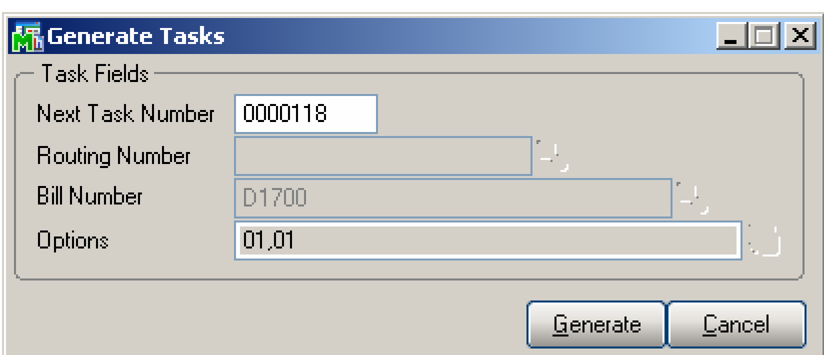


2. Task Generation for a Bill Item (available if the **Present Sales Kit as a Set of Regular Items** option is turned off in the **Service Management Options**):

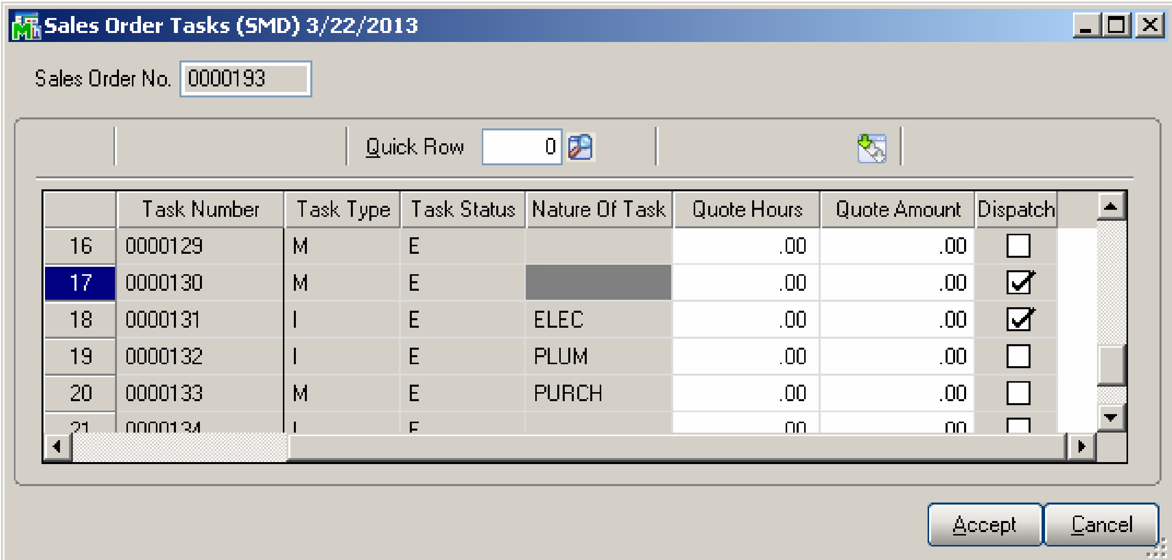


If the selected Bill Number has options, the **Options Selection** screen will be displayed, where you can change options.

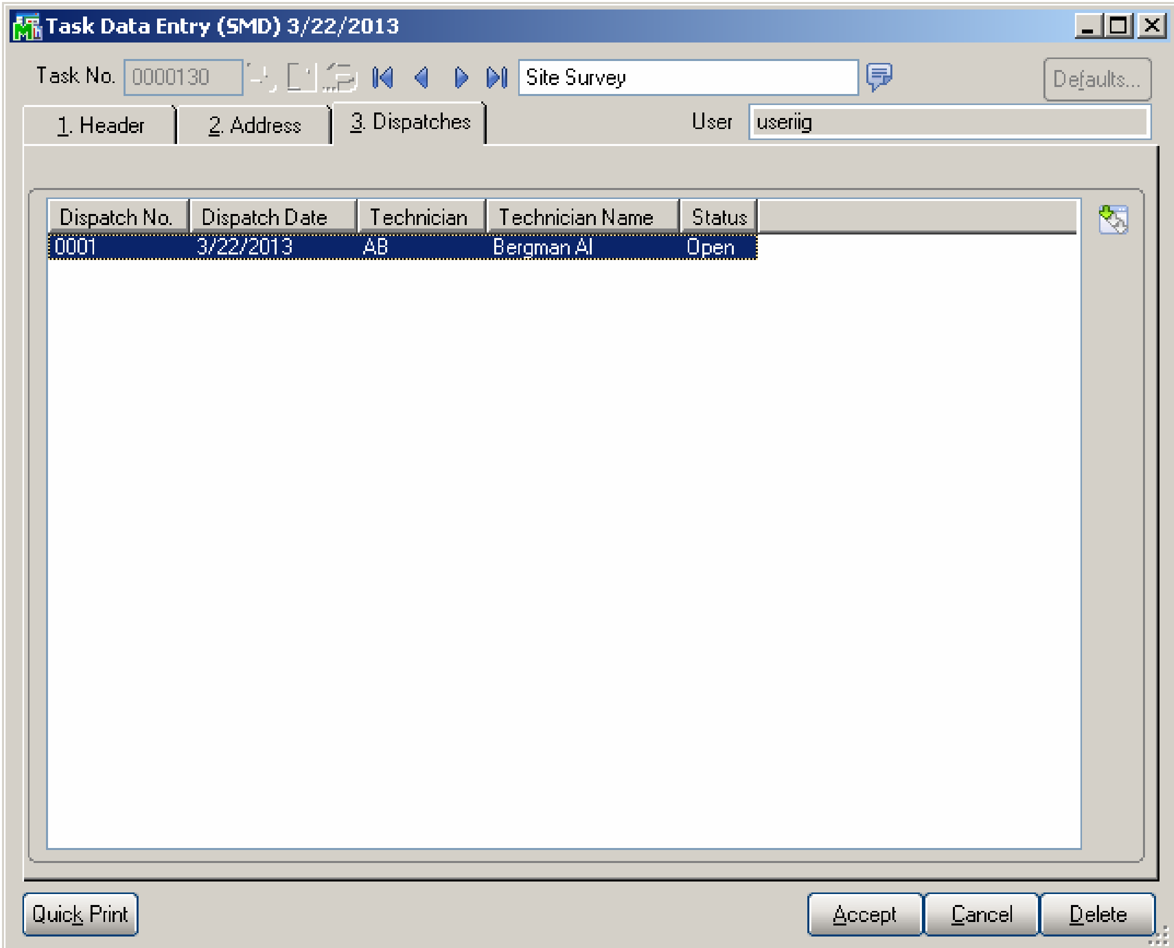
The **Generate Tasks** screen is opened with the Bill number selected and disabled:

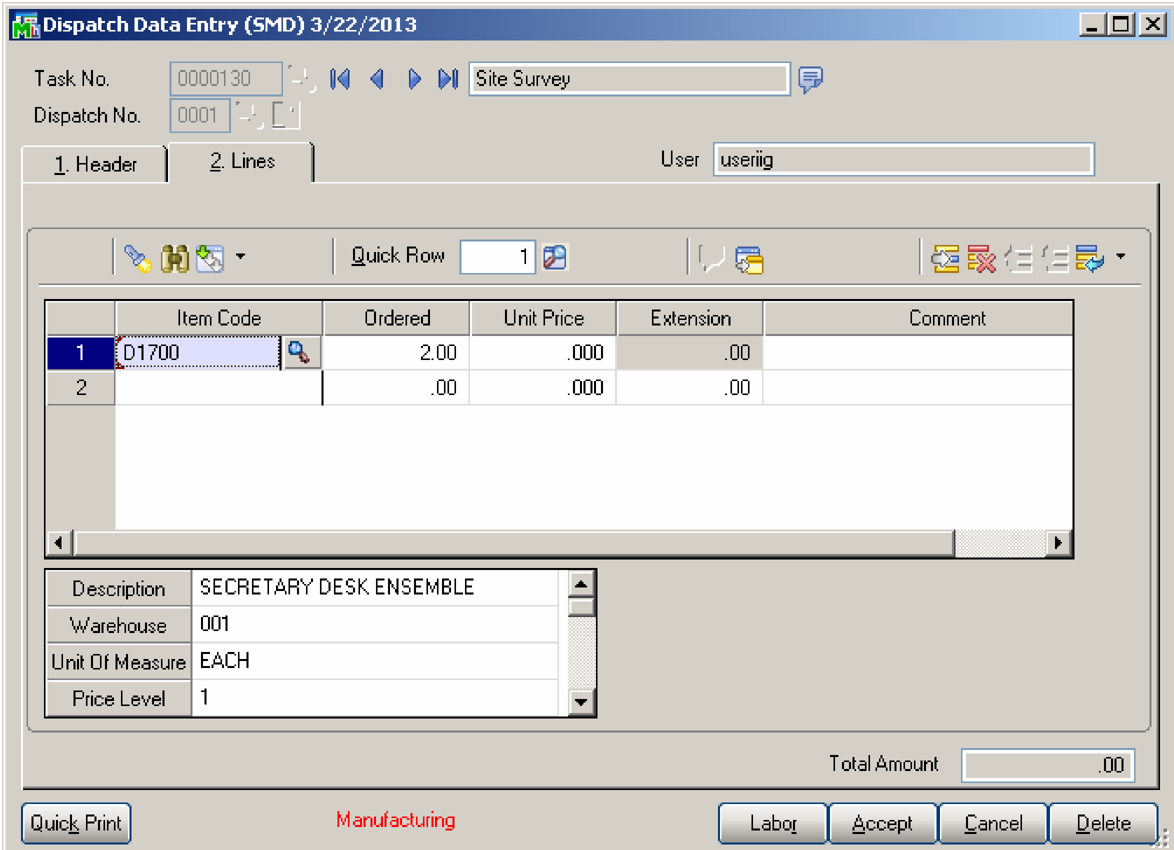


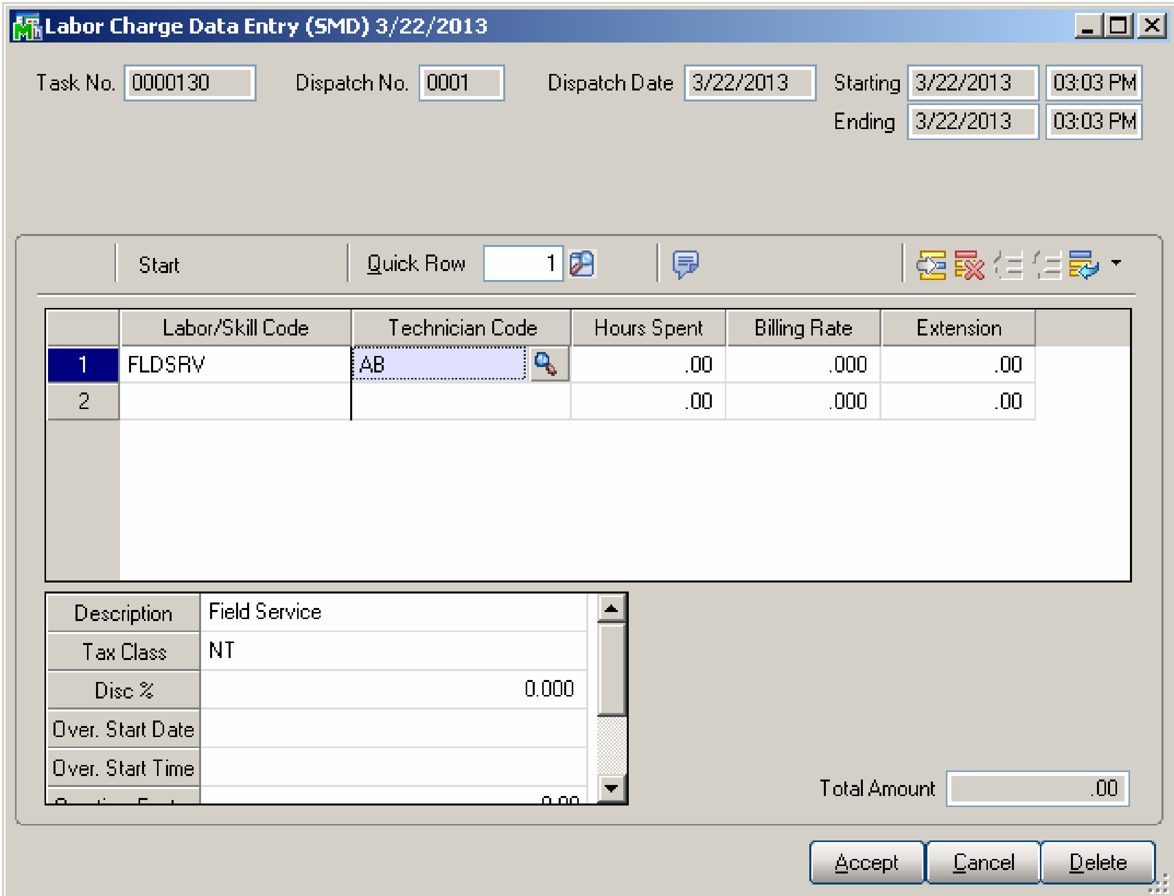
For the steps having **Mfg** checkbox selected in the Routing Maintenance Dispatches will be automatically created under the Task with a Labor Charge line having the **Labor/Skill** and **Technician** specified for that Step of the Routing.



Here is an example of Manufacturing Dispatch generated for the selected Bill number:

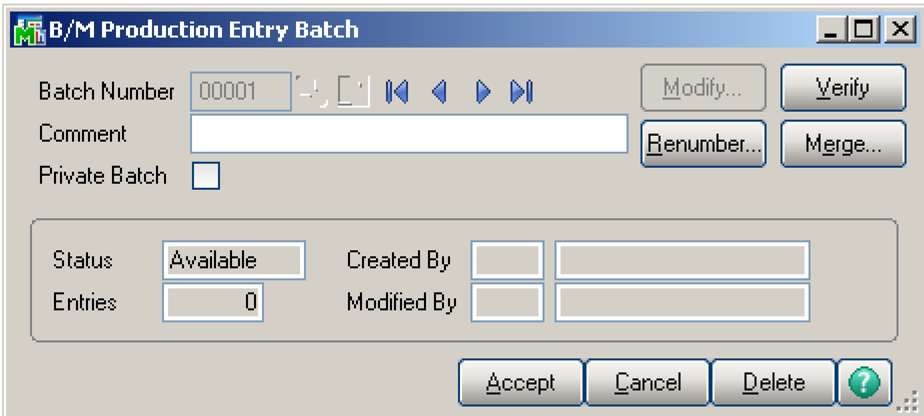

Task Data Entry (SMD) 3/22/2013
Task No. 0000130
Site Survey
Defaults...
1. Header
2. Address
3. Dispatches
User useriig
Dispatch No.
Dispatch Date
Technician
Technician Name
Status
0001
3/22/2013
AB
Bergman Al
Open
Quick Print
Accept
Cancel
Delete

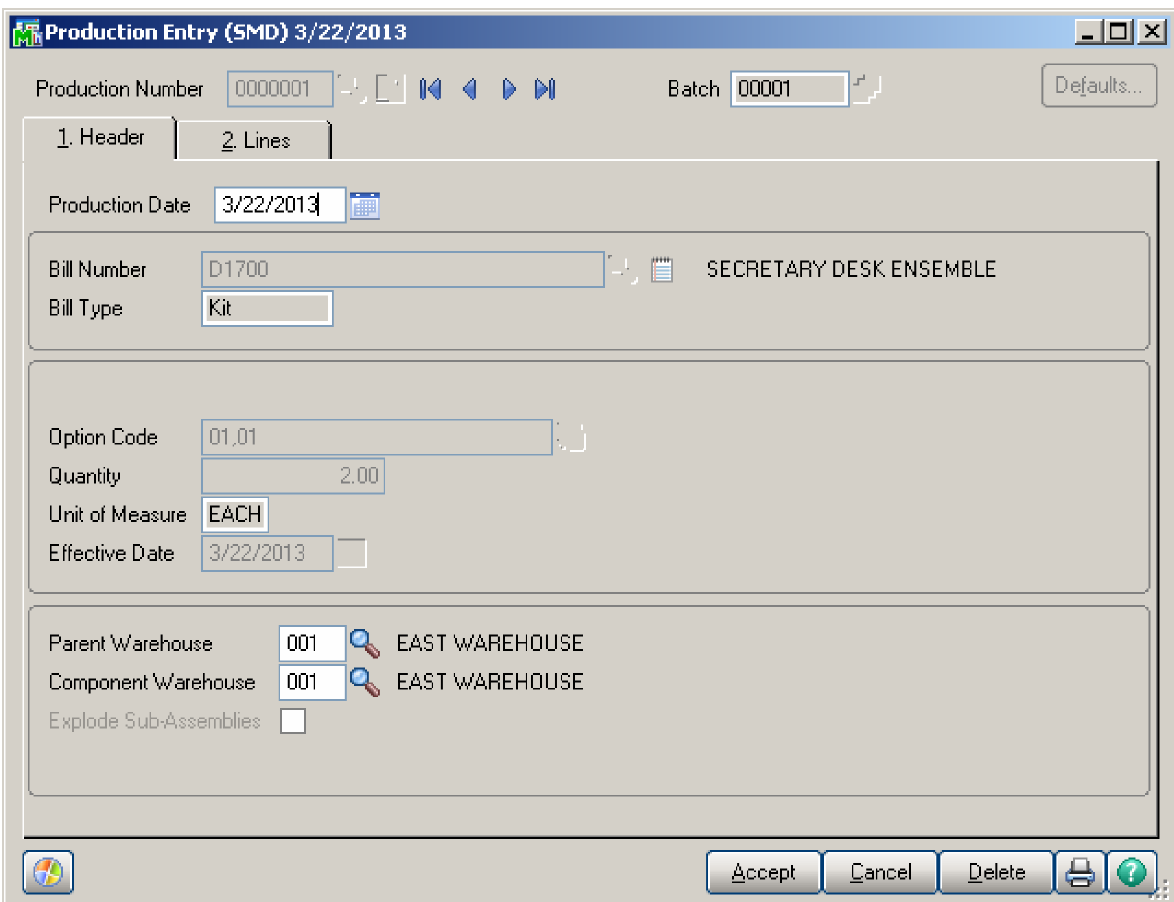

Dispatch Data Entry (SMD) 3/22/2013
Task No.
0000130
Site Survey
Dispatch No.
0001
1. Header
2. Lines
User
useriig
Quick Row
1
Item Code
Ordered
Unit Price
Extension
Comment
1
D1700
2.00
.000
.00
2
.00
.000
.00
Description
SECRETARY DESK ENSEMBLE
Warehouse
001
Unit Of Measure
EACH
Price Level
1
Total Amount
.00
Quick Print
Manufacturing
Labor
Accept
Cancel
Delete


Labor Charge Data Entry (SMD) 3/22/2013
Task No. 0000130
Dispatch No. 0001
Dispatch Date 3/22/2013
Starting 3/22/2013 03:03 PM
Ending 3/22/2013 03:03 PM
Start
Quick Row 1
Labor/Skill Code
Technician Code
Hours Spent
Billing Rate
Extension
1 FLDSRV AB .00 .000 .00
2 .00 .000 .00
Description Field Service
Tax Class NT
Disc % 0.000
Over. Start Date
Over. Start Time
Total Amount .00
Accept
Cancel
Delete

Production Generation when Closing Manufacturing Dispatch

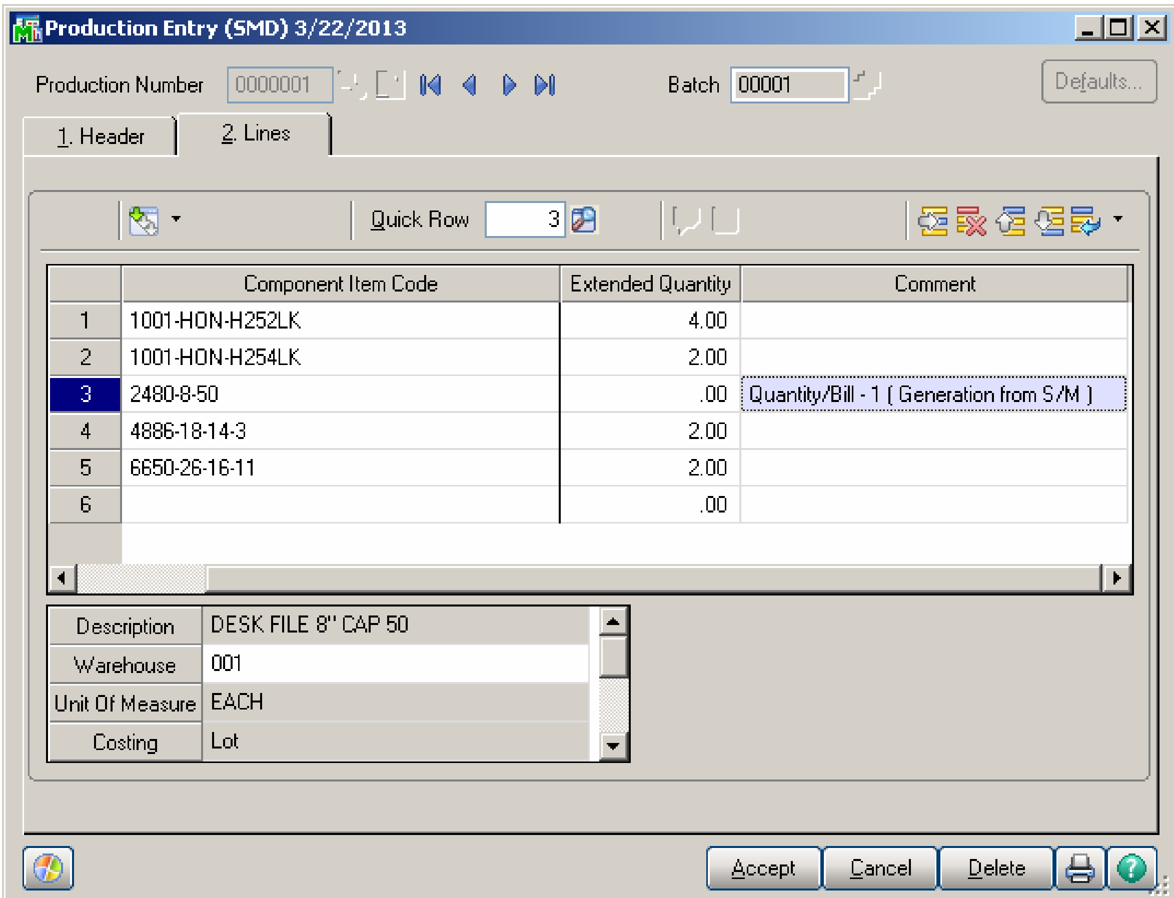
When Manufacturing Dispatch is Closed, the program generates Production with the Bill number and Quantity loaded.





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 Quantity/Bill, which the user may enter and distribute manually.

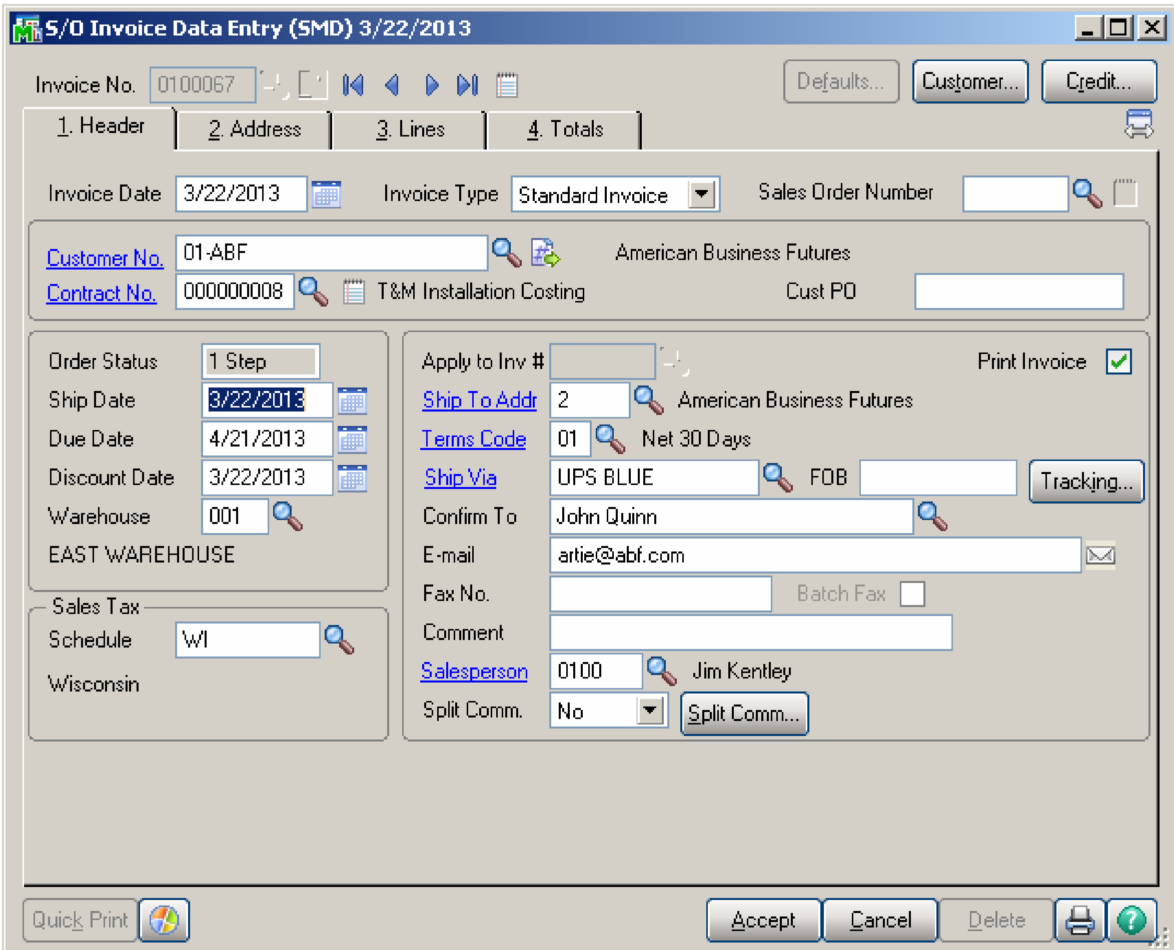


No **Sales Order** or **Invoice** is generated for **Manufacturing Dispatches** during Dispatch **Closing**.

For Bill number, which represents Lot/Serial Item the Lot/Serial number specified on the Production header will be carried over to the corresponding Contract Header during the Production Register/Update in case no Lot/Serial number is specified on the Contract being generated during Task generation in the Sales Order Entry.

S/O Invoice Data Entry

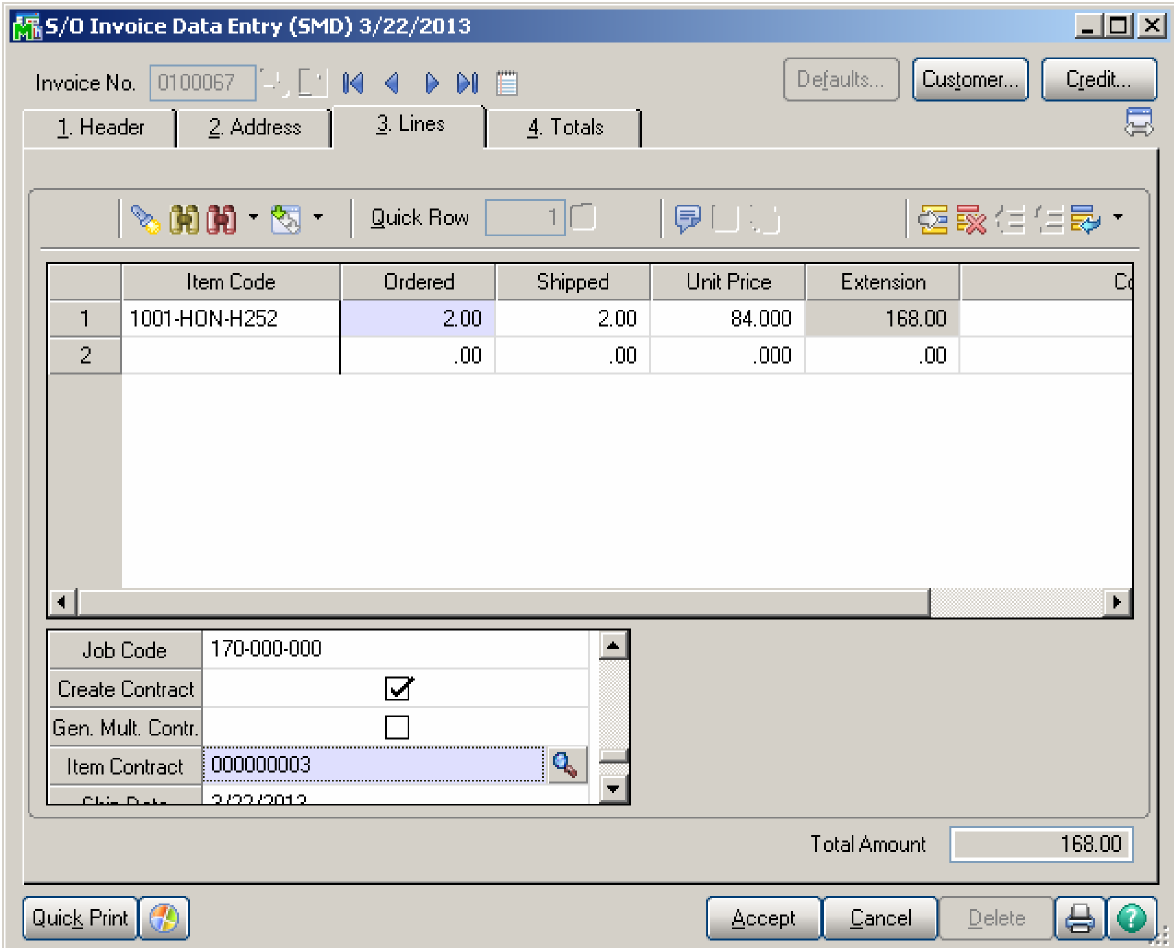
Enter the **Contract Number** to sell items against that contract. Any existing contract can be selected using the **Lookup** button (the Template contracts are not displayed in the lookup).



Select **Contract Memo** for current Contract.

If the **Use Item contract instead of Order contract** box is selected in the **Service Management Options**, the contracts set for the items in the **Inventory Maintenance** program for the items will be used instead of the contract of the Sales Order (or Invoice) to generate contracts during invoice update.

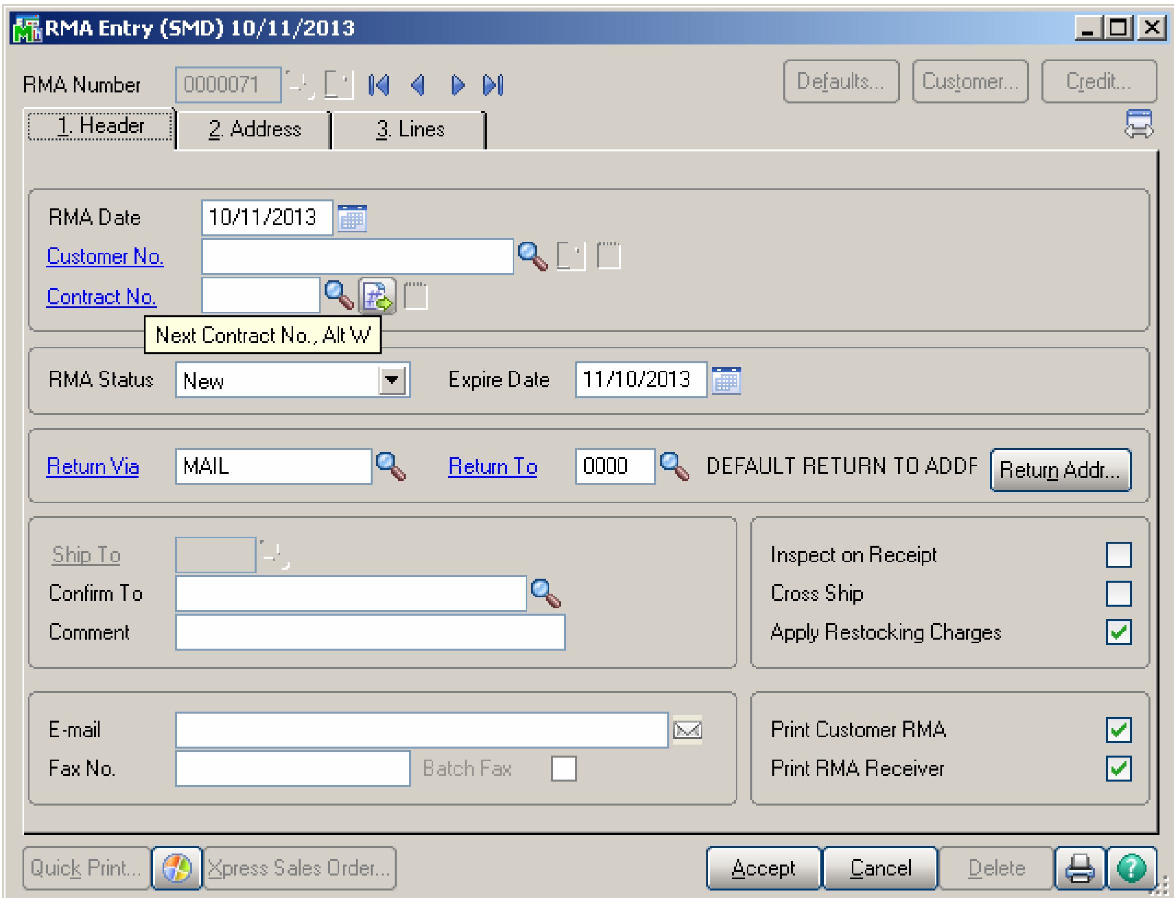
The **Create Contract**, **Generate Multiple Contracts**, and **Item Contract** fields work similar to the corresponding fields in the Sales Order Entry program.


S/O Invoice Data Entry (SMD) 3/22/2013
Invoice No. 0100067
Defaults...
Customer...
Credit...
1. Header
2. Address
3. Lines
4. Totals
Quick Row 1
Item Code
Ordered
Shipped
Unit Price
Extension
1 1001-HON-H252 2.00 2.00 84.000 168.00
2 .00 .00 .000 .00
Job Code 170-000-000
Create Contract
Gen. Mult. Contr.
Item Contract 000000003
Total Amount 168.00
Quick Print
Accept
Cancel
Delete

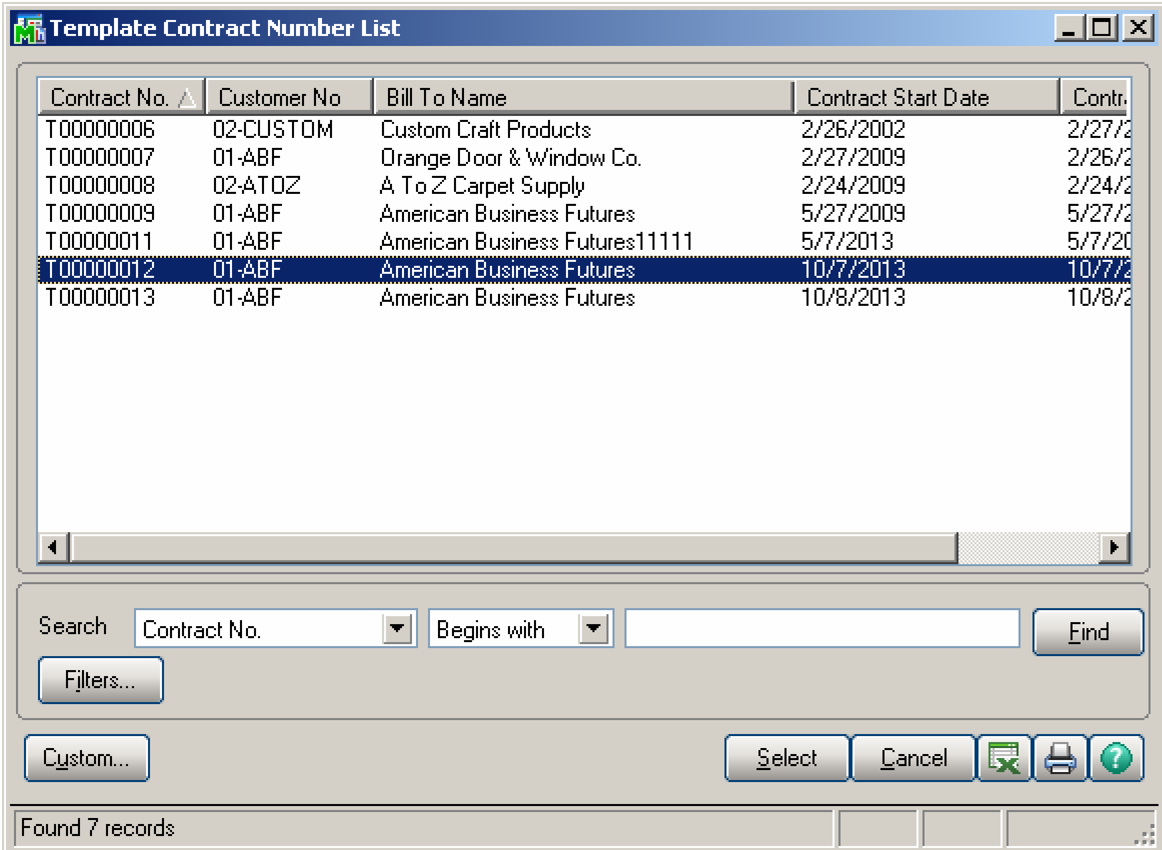
Return Merchandise Authorization

RMA Entry

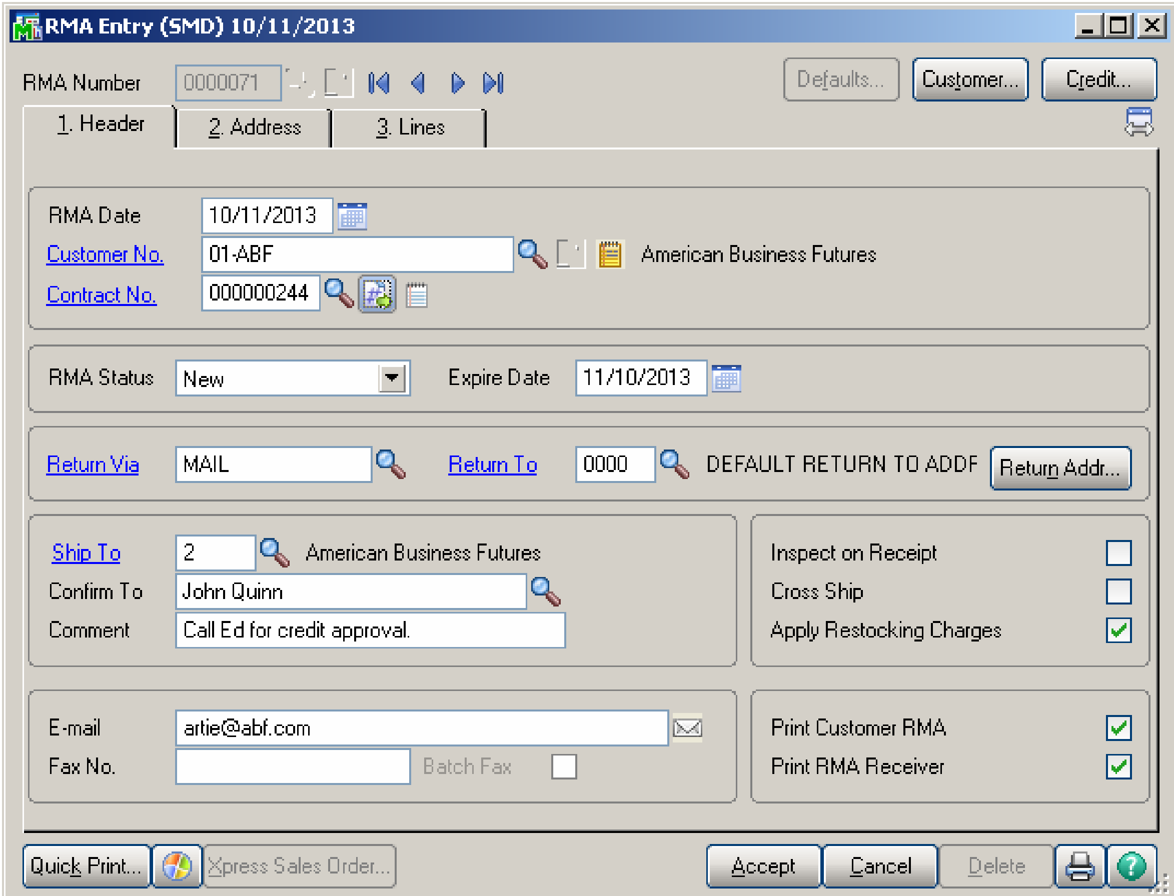
The **Contract No.** field with its **Contract Memo** has been added to the **Header** tab of **RMA Entry** screen. The user may select an existing Contract or just create a new Contract during Return Entry.



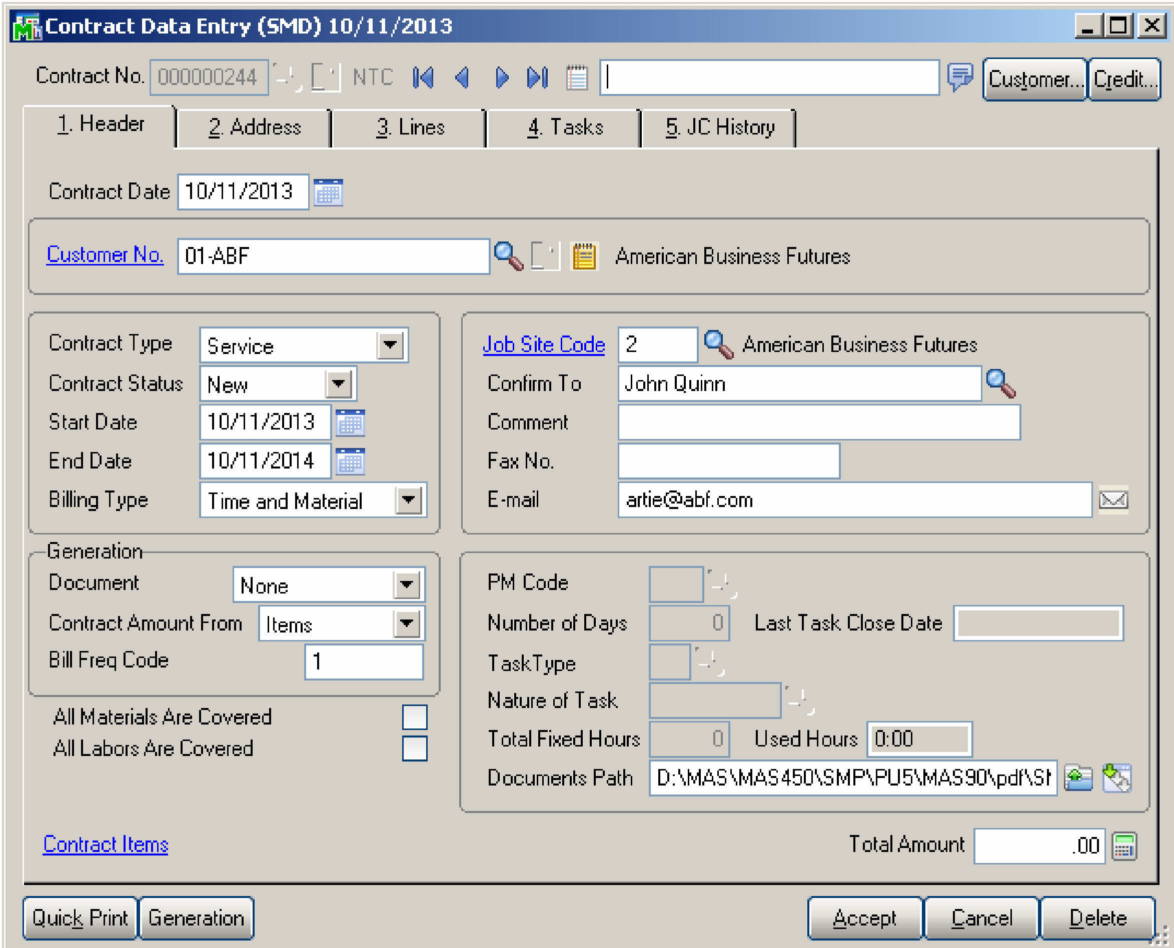
Upon pressing the Next Contract button the Template Contract Number List is opened allowing the user to select a template and create new Contract based on it.



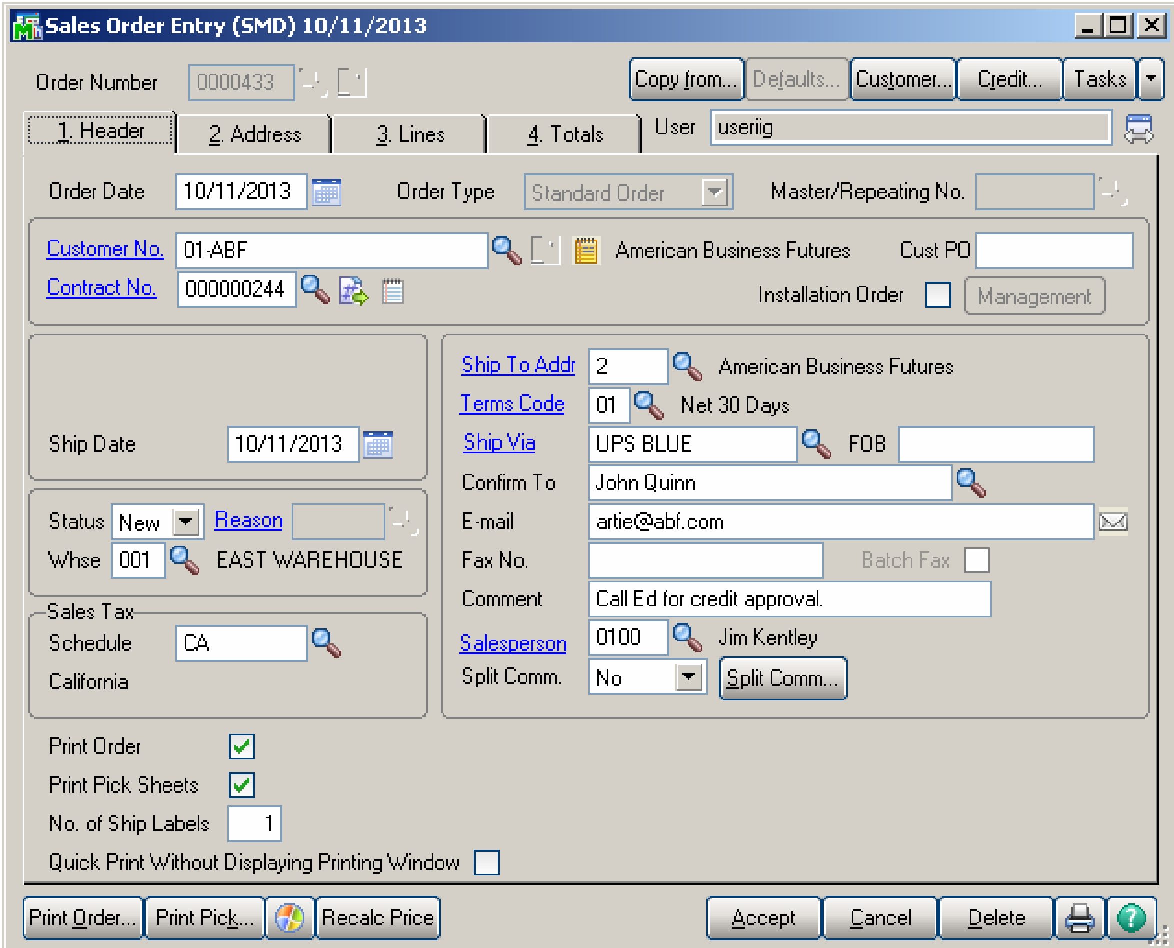
Click on the Contract field hyperlink to open the Contract Data Entry screen.



If the new Contract is created based on the Template Contract with Contract Items, those Items are loaded into the newly created Contract:

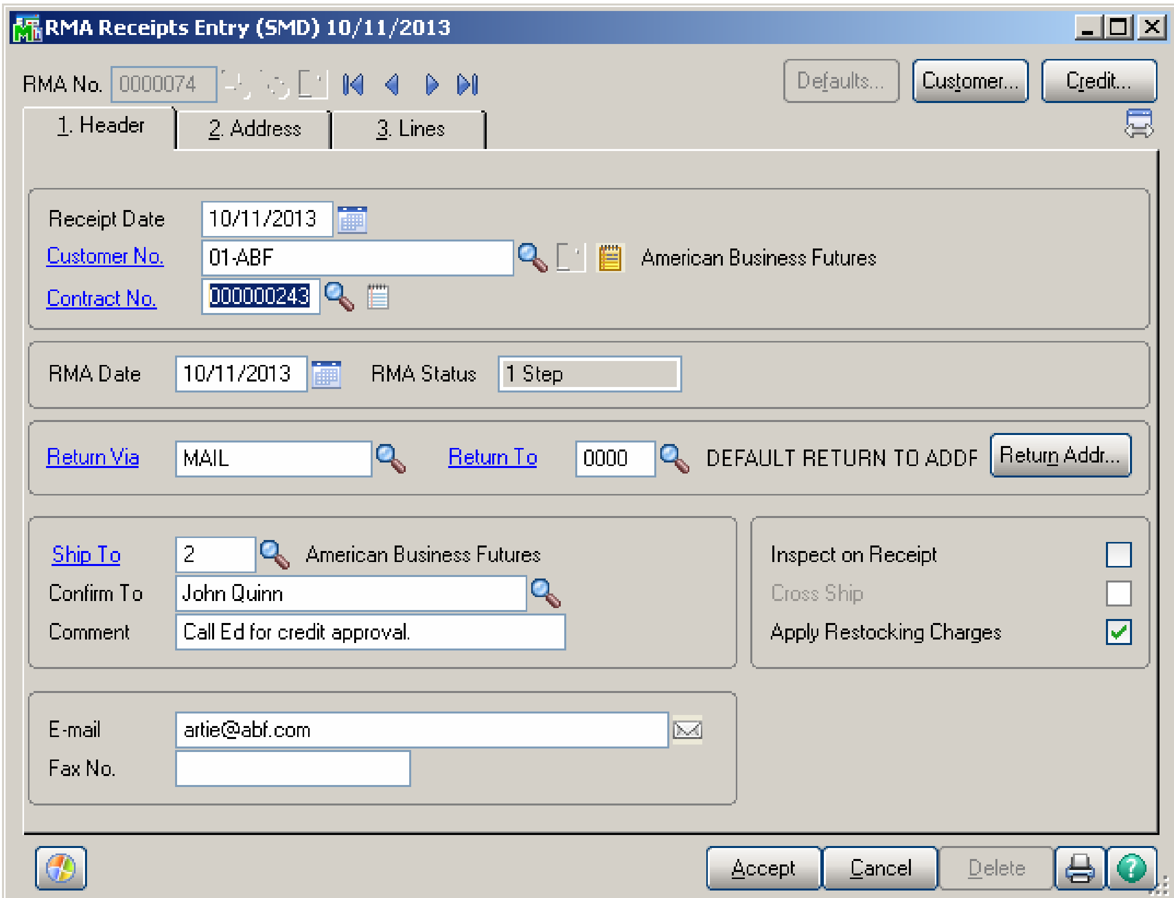


While generating express Sales Order from RMA Entry, the Contract Number selected on the RMA Header is transferred to the generated Sales Order:

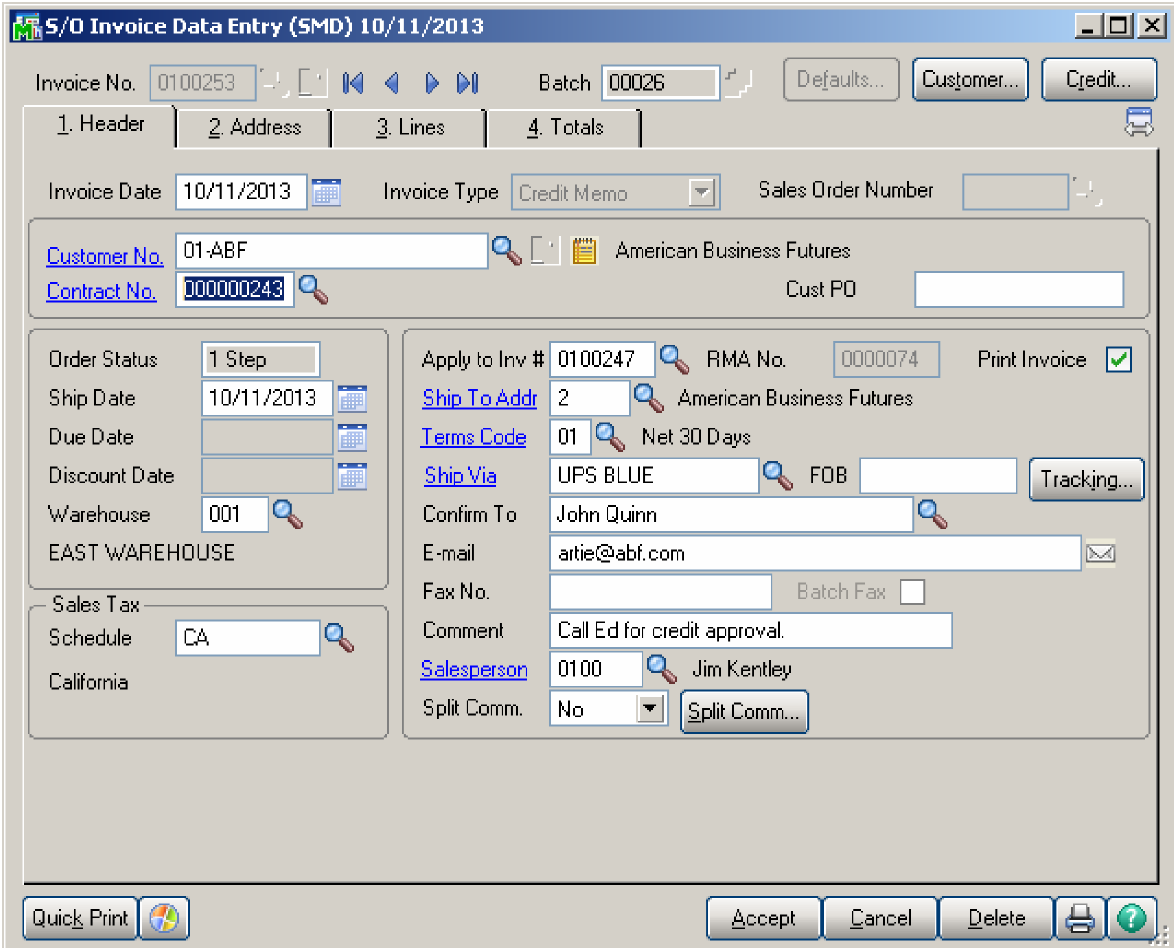

Sales Order Entry (SMD) 10/11/2013
Order Number 0000433
Copy from... Defaults... Customer... Credit... Tasks
1. Header 2. Address 3. Lines 4. Totals
User useriig
Order Date 10/11/2013
Order Type Standard Order
Master/Repeating No.
Customer No. 01-ABF American Business Futures
Cust PO
Contract No. 000000244
Installation Order
Management
Ship Date 10/11/2013
Ship To Addr 2 American Business Futures
Terms Code 01 Net 30 Days
Ship Via UPS BLUE
FOB
Confirm To John Quinn
E-mail artie@abf.com
Fax No.
Batch Fax
Comment Call Ed for credit approval.
Status New
Reason
Whse 001 EAST WAREHOUSE
Sales Tax
Schedule CA
California
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
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 Entry** screen:



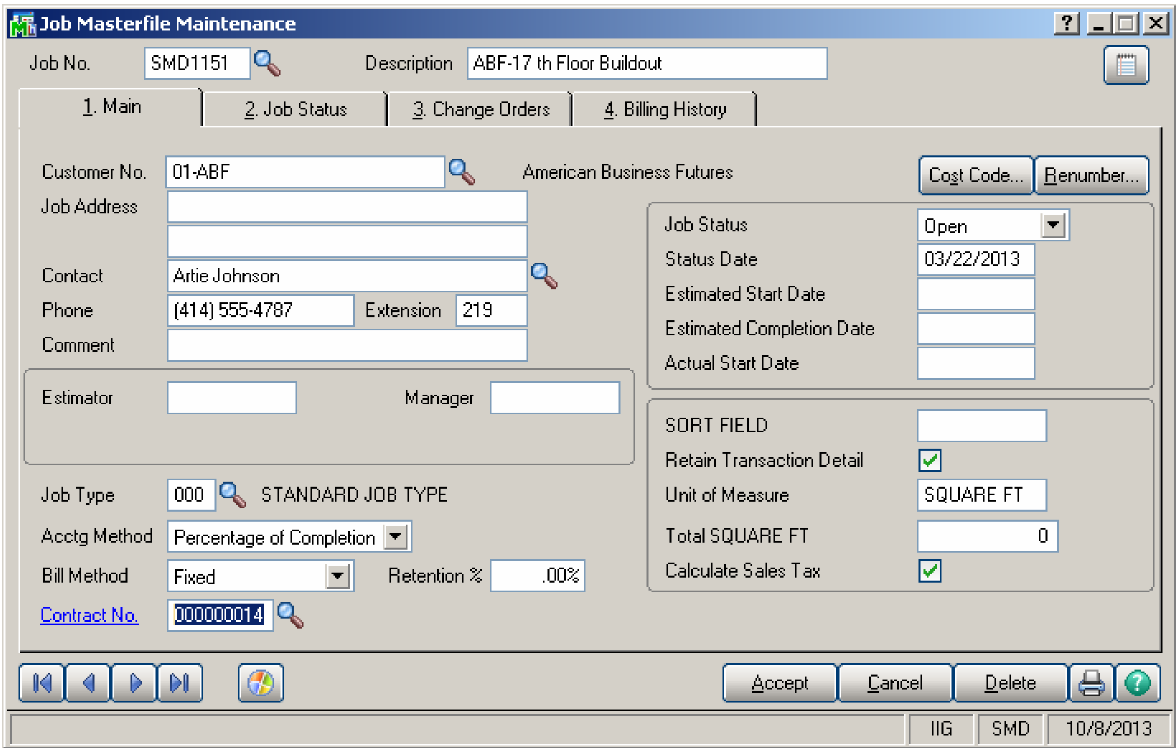
The user can select a **Contract No** from the Contract lookup list while entering RMA Receipt.
While generating transactions the Contract number is transferred to the generated sales documents: Sales Order and Credit Memo type Invoice:


S/O Invoice Data Entry (SMD) 10/11/2013
Invoice No. 0100253
Batch 00026
Defaults...
Customer...
Credit...
1. Header
2. Address
3. Lines
4. Totals
Invoice Date 10/11/2013
Invoice Type Credit Memo
Sales Order Number
Customer No. 01-ABF
American Business Futures
Contract No. 000000243
Cust PO
Order Status 1 Step
Ship Date 10/11/2013
Due Date
Discount Date
Warehouse 001
EAST WAREHOUSE
Sales Tax
Schedule CA
California
Apply to Inv # 0100247
RMA No. 0000074
Print Invoice
Ship To Addr 2
American Business Futures
Terms Code 01
Net 30 Days
Ship Via UPS BLUE
FOB
Tracking...
Confirm To John Quinn
E-mail artie@abf.com
Fax No.
Batch Fax
Comment Call Ed for credit approval.
Salesperson 0100
Jim Kentley
Split Comm. No
Split Comm...
Quick Print
Accept
Cancel
Delete

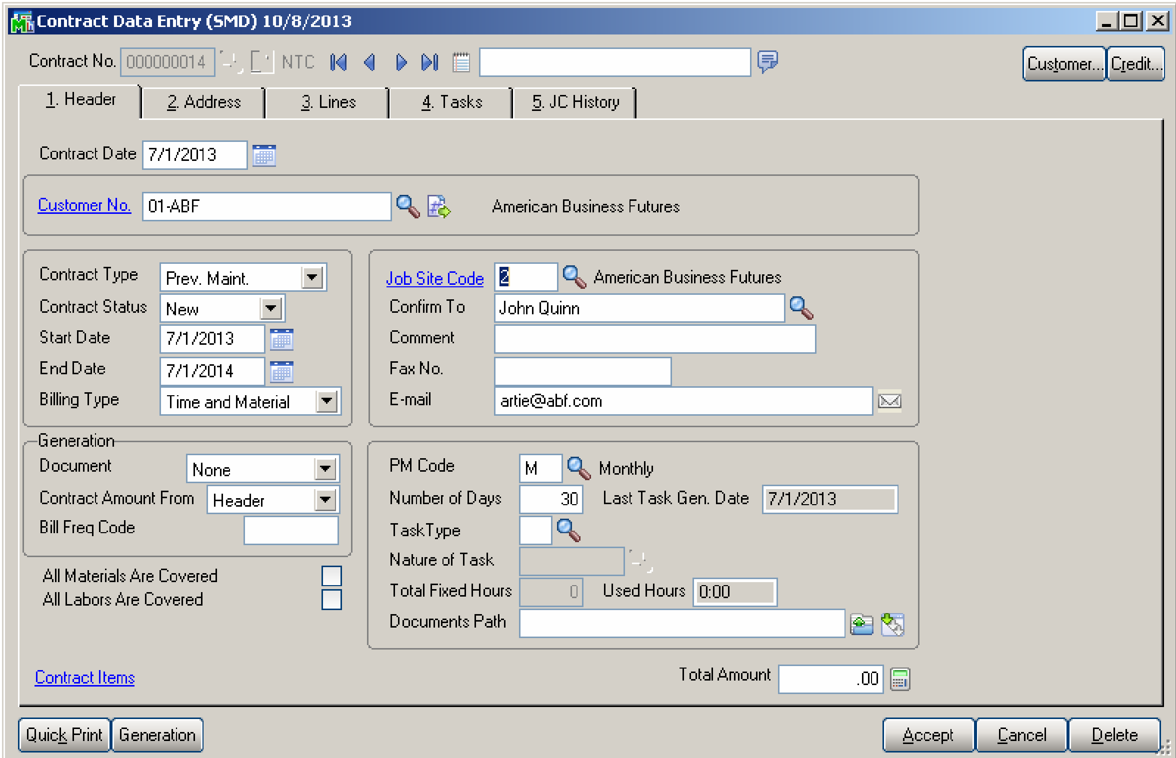
Job Cost Integration

Job Masterfile Maintenance

The **Contract No.** field has been replaced with the S/M **Contract No.** field on the **Job Masterfile Maintenance** screen.



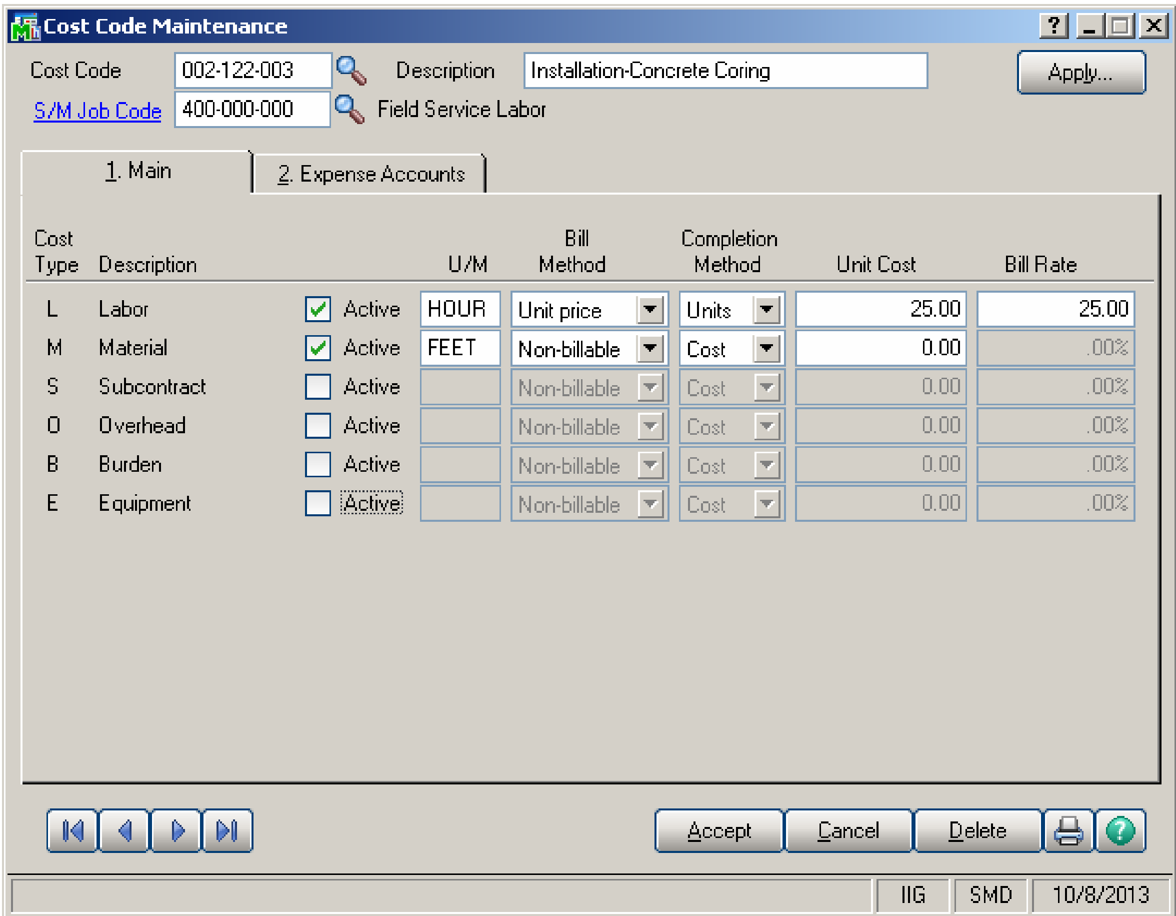
When entering a **Job**, you can select a Contract from the Contract Number lookup. When a contract is selected in the **Contract No.** field, click the Contract hyperlink to open the selected contract.



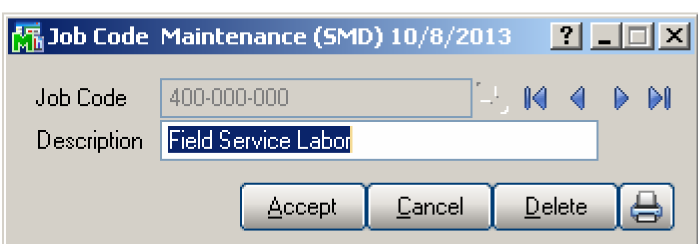
You can select any existing Contract from the lookup.

Cost Code Maintenance

The **S/M Job Code** field has been added on the **Cost Code Maintenance** screen under the **Job Cost Setup** menu.

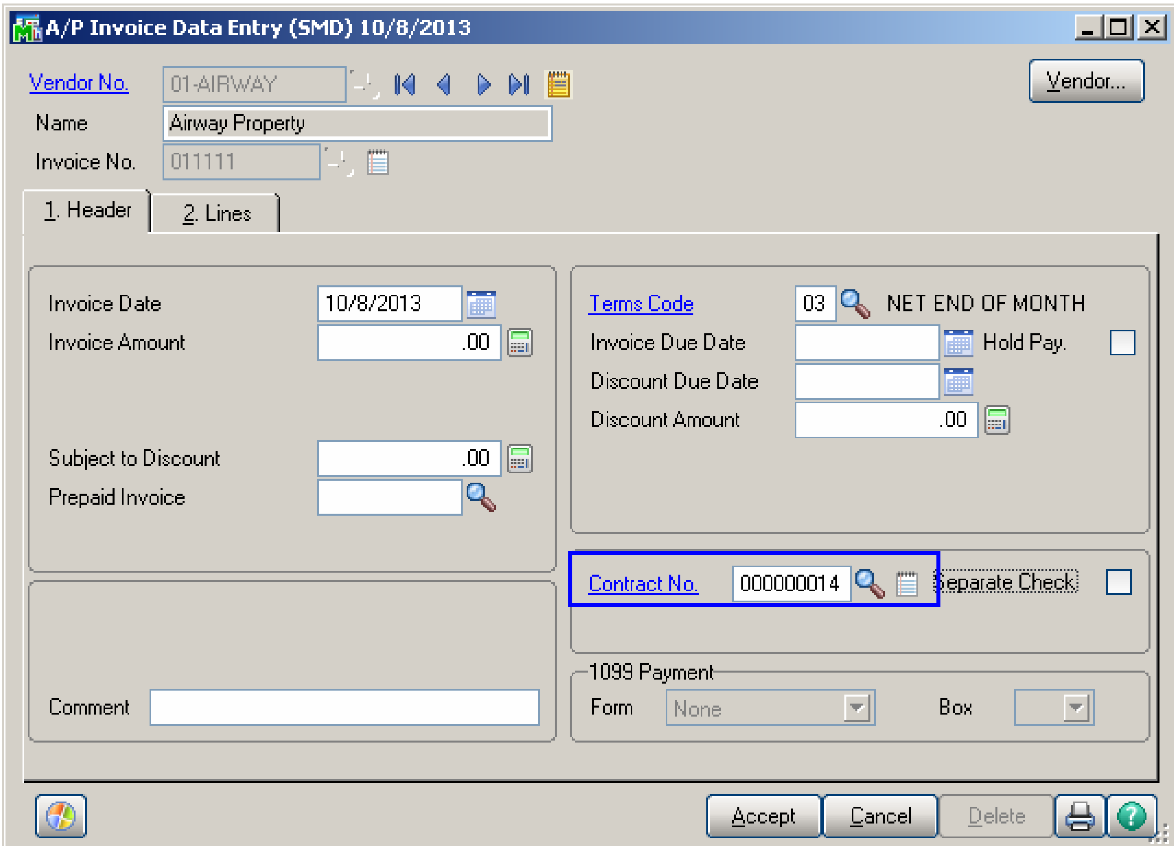


Click the **S/M Job Code** hyperlink to open the **Job Code Maintenance**:



A/P Invoice Data Entry

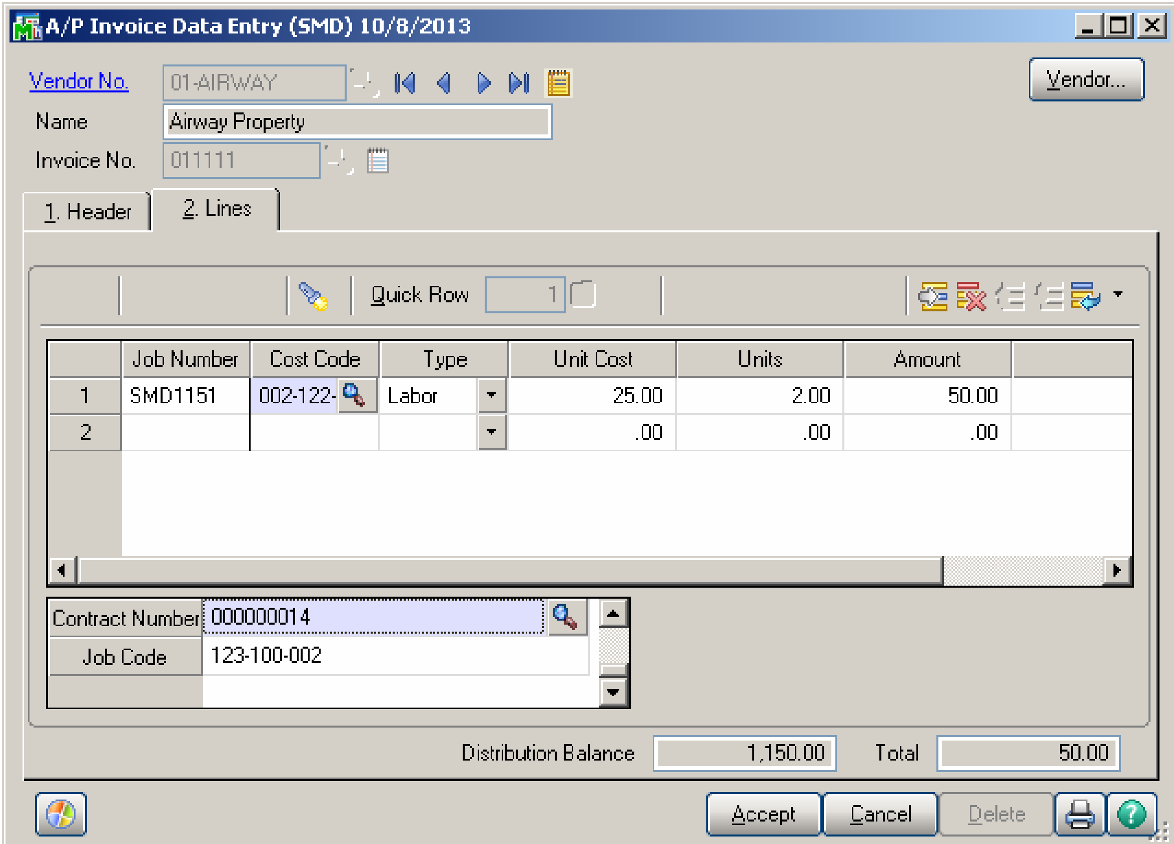
The **Contract No.** field has been added to the **A/P Invoice Data Entry Header** screen. This Contract will be used as default for the invoice lines entered for Job Numbers not having S/M Contract specified.



The **Contract Memo** button has been added near the **Contract No.** field to allow entering Memo for current Vendor.

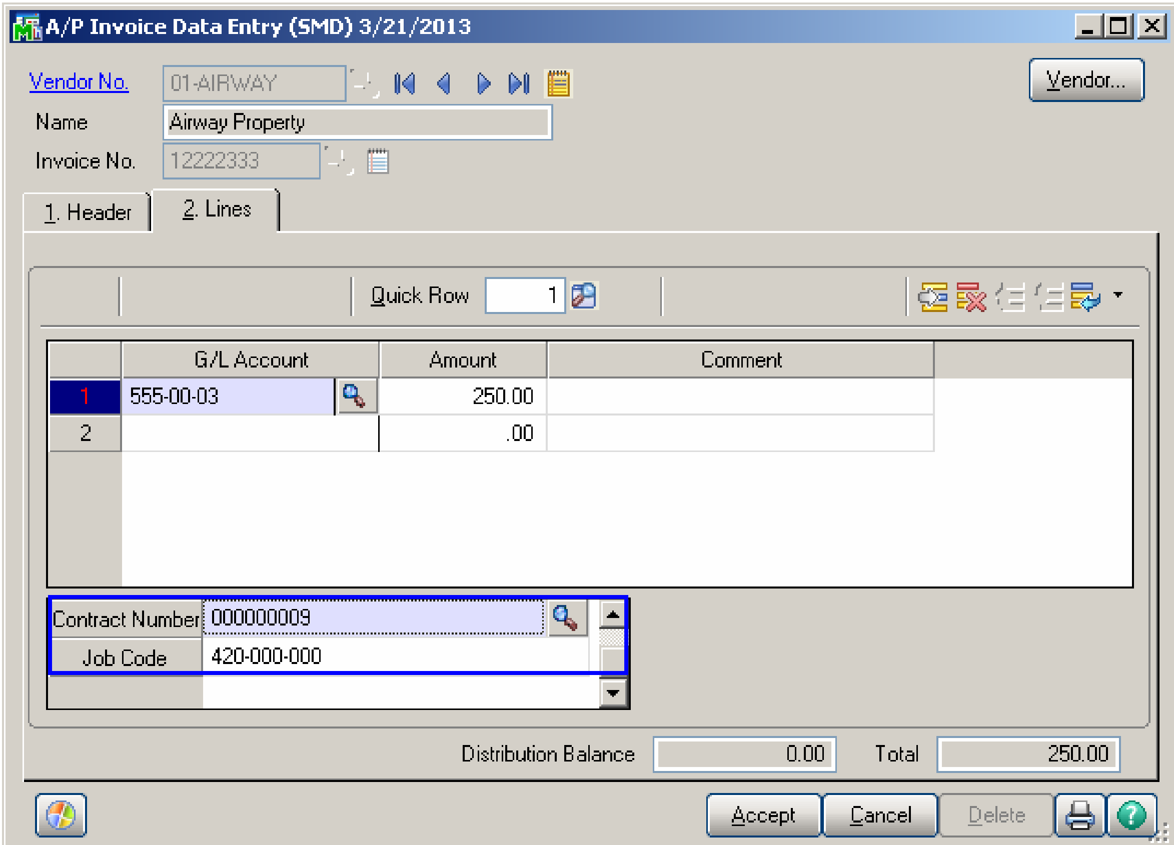
The lines can be displayed either with GLs or with JC (dependent which one of Integrate with **General Ledger** or **Job Cost** check boxes is selected in the **Accounts Payable Options**).

The **Contract Number** and **Job Code** fields have been added to the Lines tab:



Contract Number and **Job Code** are provided for lines also in the Crystal Reports' work files of AP Invoice.

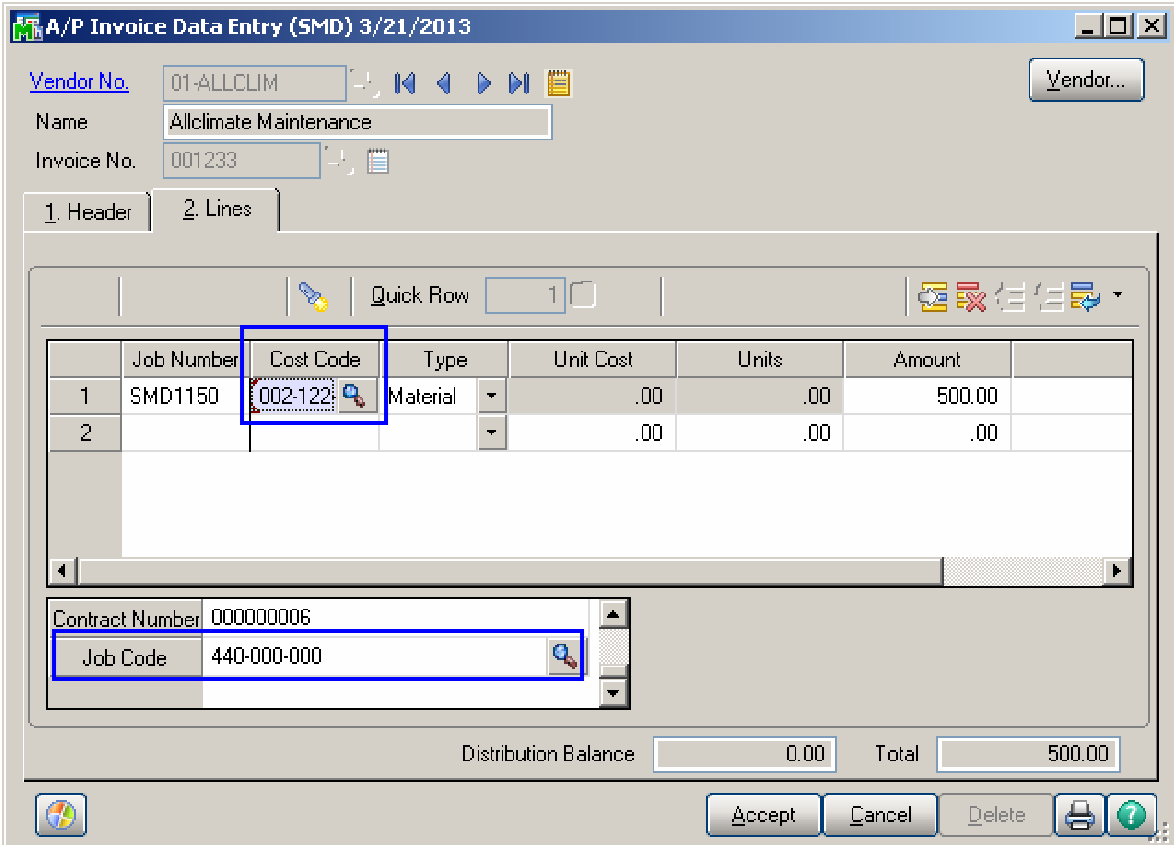
If **Integrate with General Ledger** option is enabled in the **Accounts Payable Options**, the **A/P Invoice Data Entry** screen will be displayed as follows:.



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.

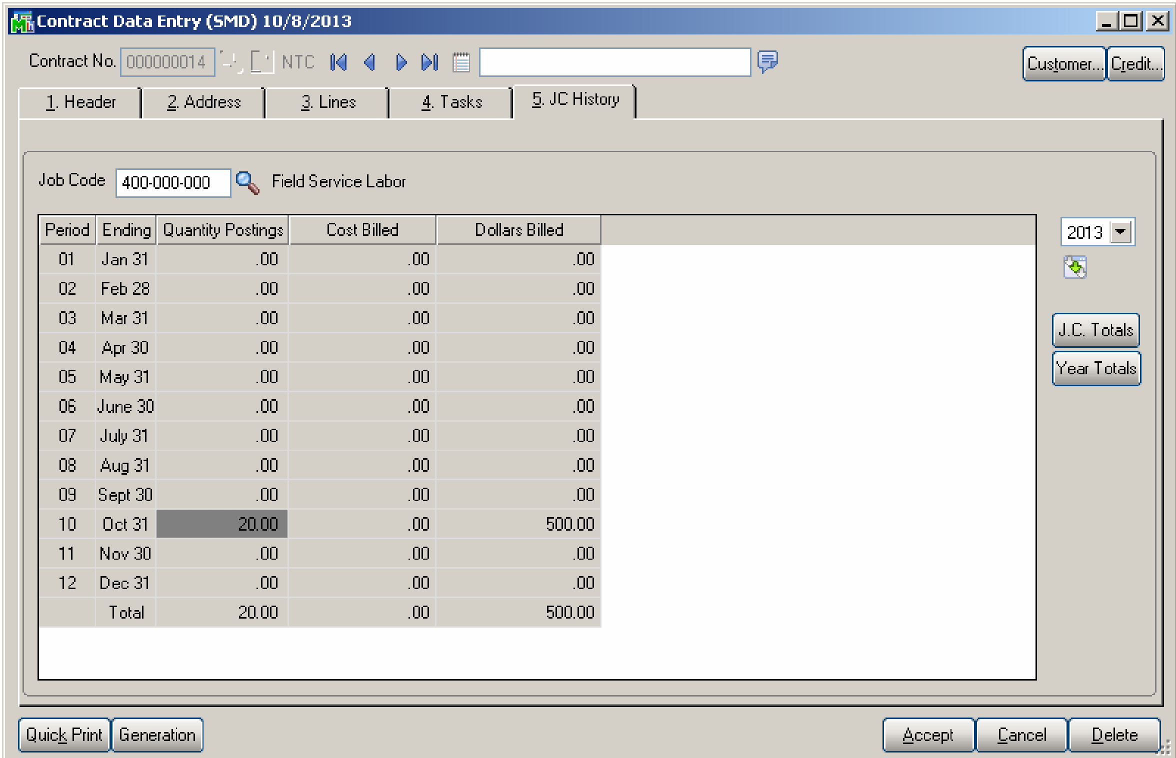
If the invoice line's **Job Number** does not have **S/M Contract** specified, default values of the Invoice **Header** will be used.

If **Job Cost** is selected in the **Accounts Payable Options**, the **A/P Invoice Data Entry** screen will be displayed by the following way.

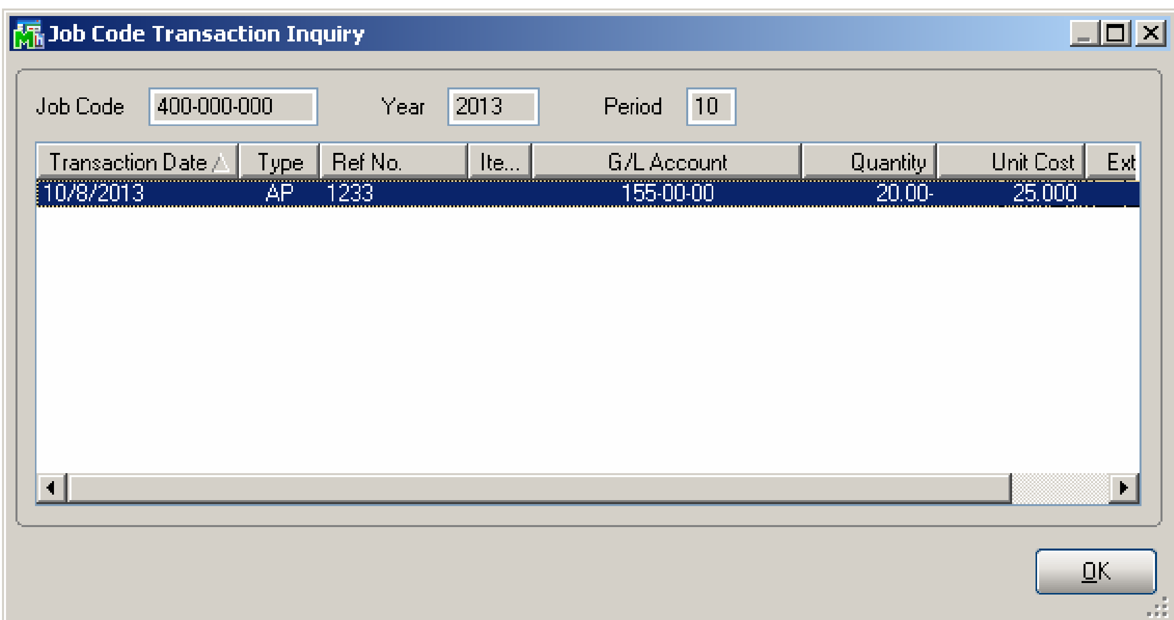


If the selected **Cost Code** has Job Code specified, then by selecting Cost Code, its Job Code will be populated in the corresponding field.

The A/P information is displayed on the **J/Code Hist.** tab of **Contract Entry**.

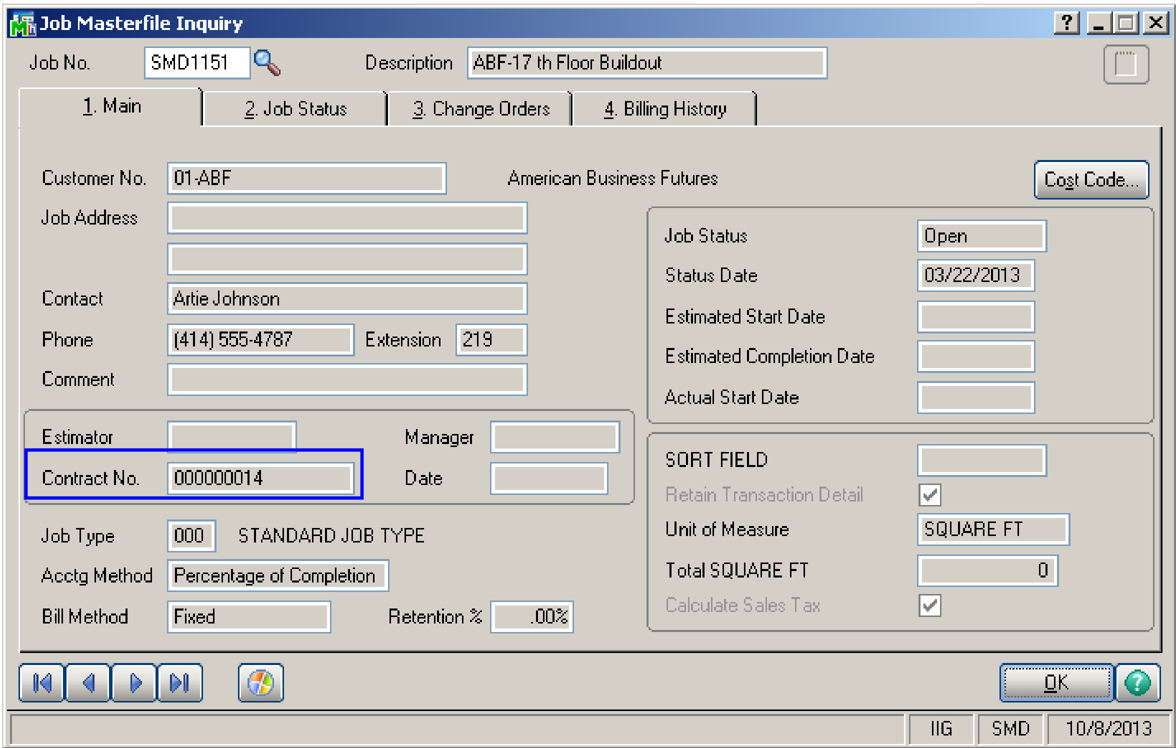


Click the **Transaction Zoom** drill down button to view the details of Job Code Transaction.



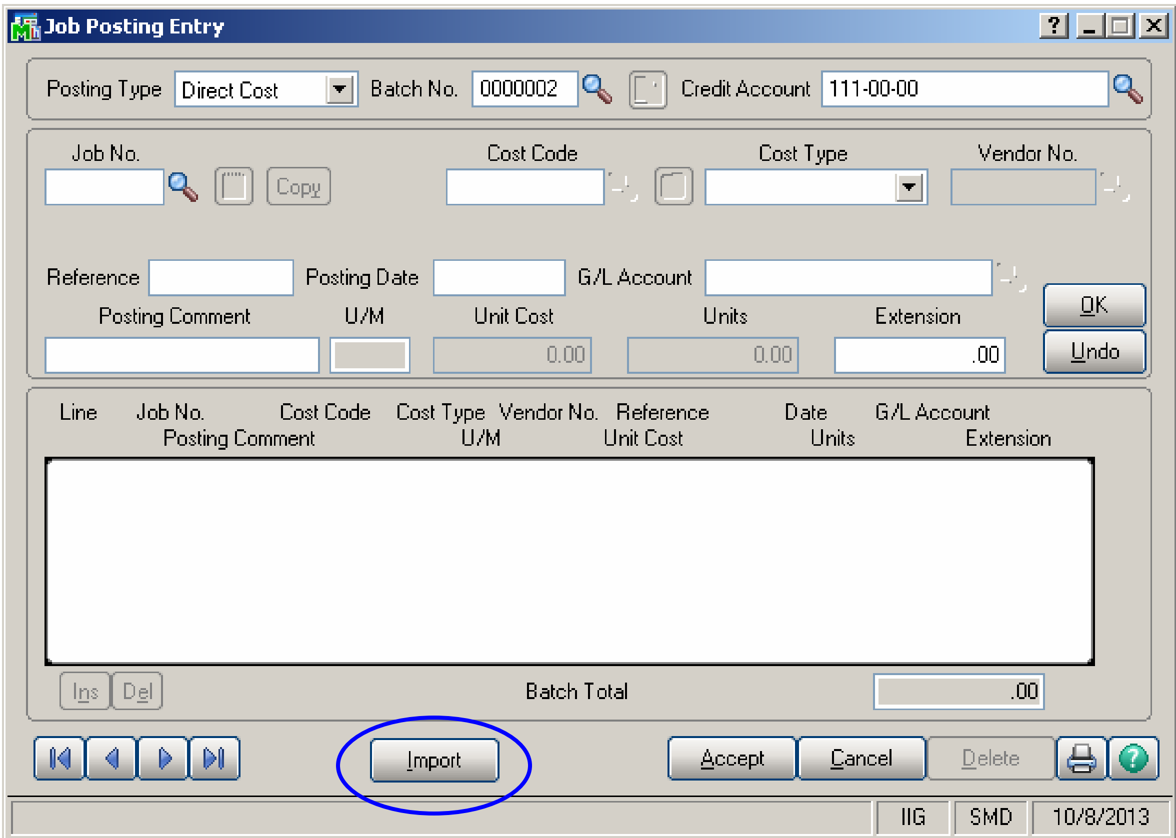
Job Masterfile Inquiry

The **Contract No.** field on the **Job Masterfile Inquiry** screen shows the S/M **Contract No.** field.

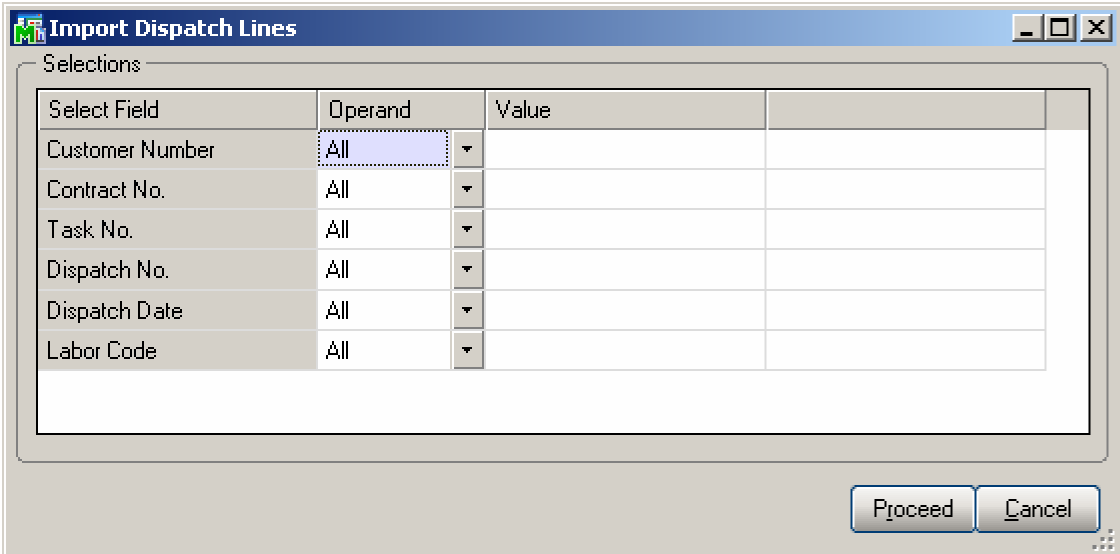


Job Posting Entry

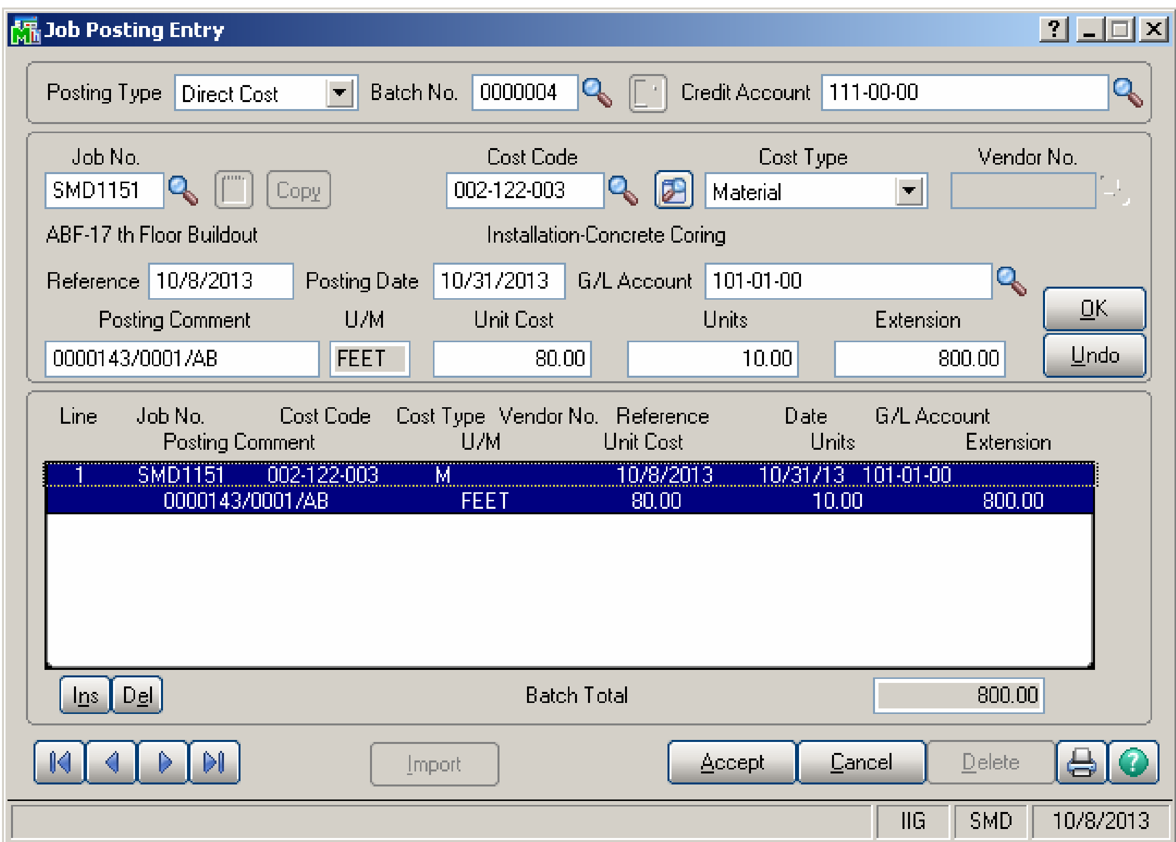
The **Import** button has been added to the **Job Posting Entry** screen. To enable this button, select **Direct Cost** as **Posting type**, specify the **Batch No**. and **Credit G/L Account** numbers.



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.



After making the selection and clicking the **Proceed** button, the Service Management information (Customer, Contract, Task, Dispatch, Date and Labor information) will be processed and loaded as **Job Posting Entry** lines.



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**).**

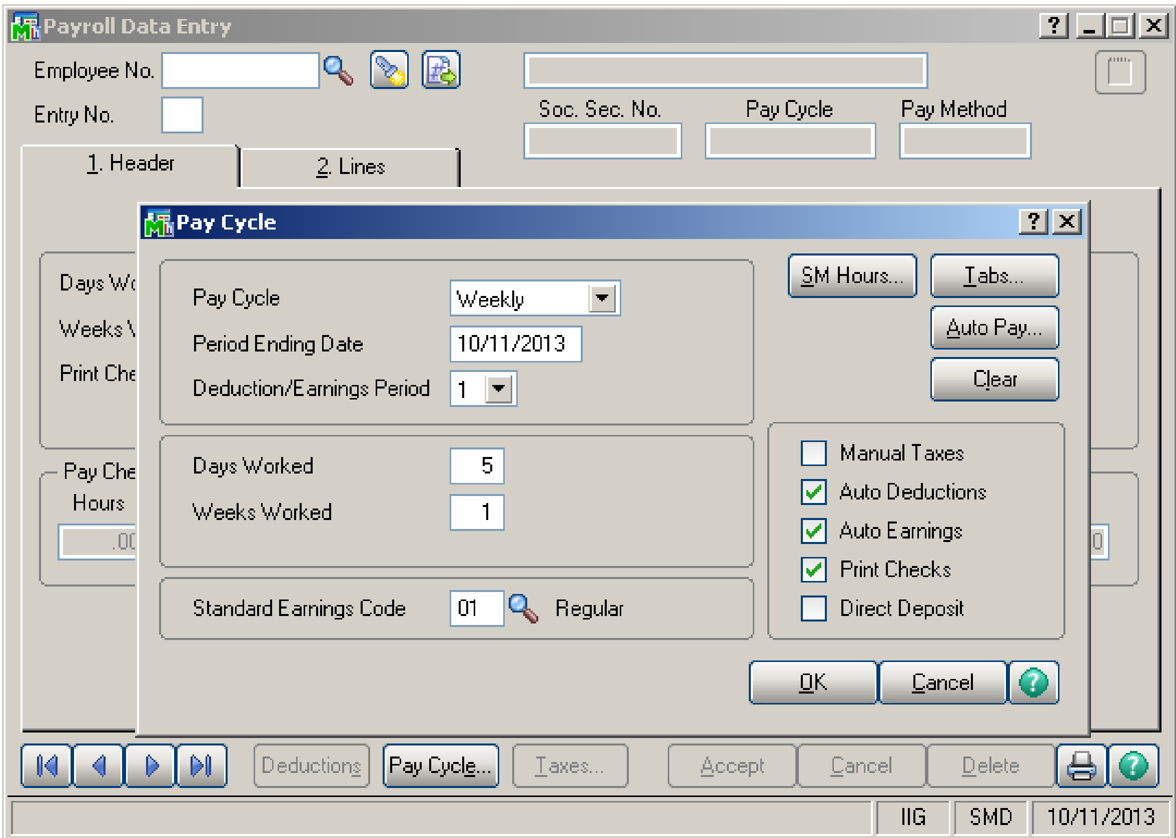
The **Cost Type** is set to **Material**, if it is **Active** for the substitute **Cost Code**.
If the **Post to G/L for Work in Process** option is not selected in the **Job Cost Options**, and there is **G/L Account** specified for the Material **Cost Type** of the substitute **Cost Code**, it will 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

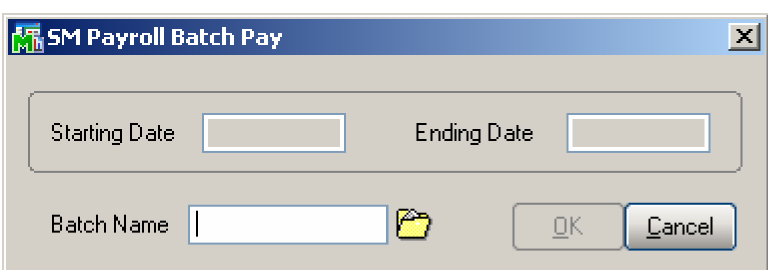
Payroll Data Entry

Select **Payroll Data Entry** under the **Payroll Main** menu. The **Pay Cycle** screen is opened.



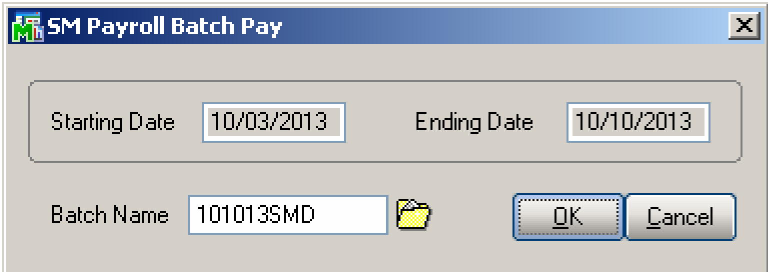
Select Weekly in the **Pay Cycle** field and click the **SM Hours** button.

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.)

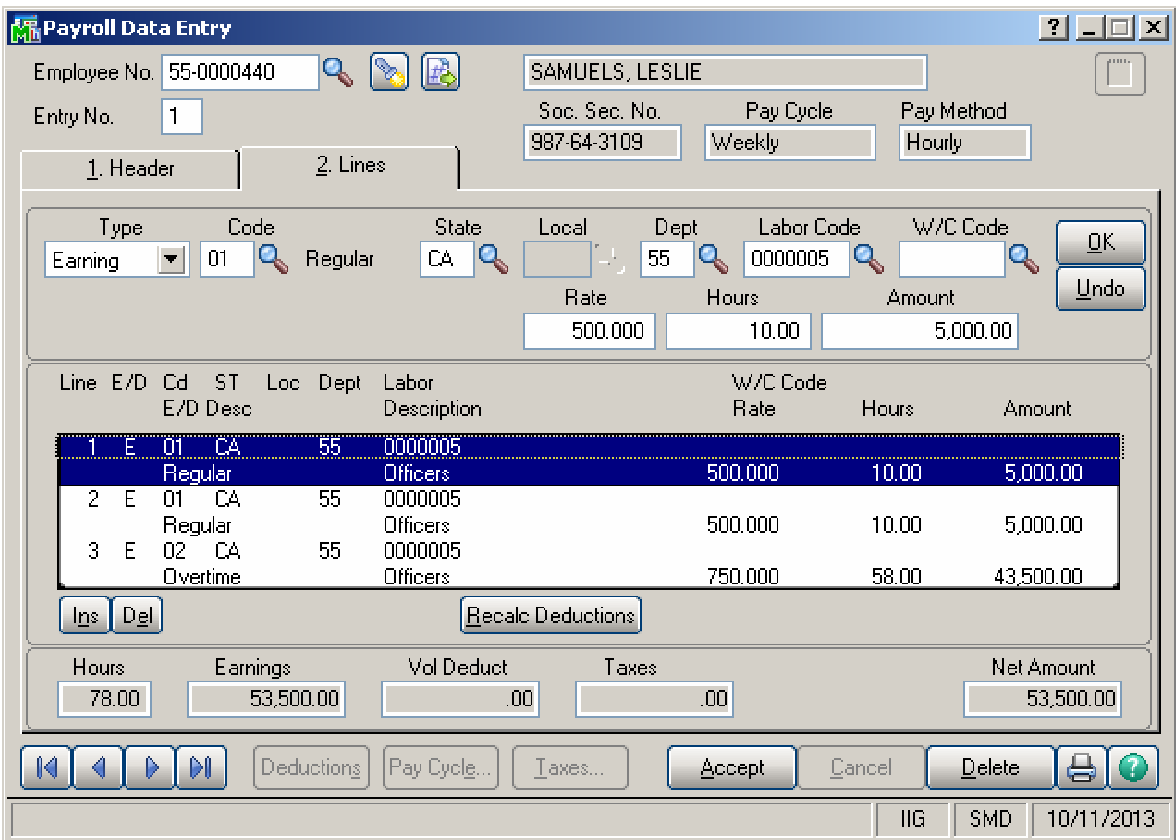


Click the **Open Batch** button.

Select the batch created in the **Payroll Batch Entry.**



Click **OK** to generate **Payroll Data Entries** for the Employees in the batch.



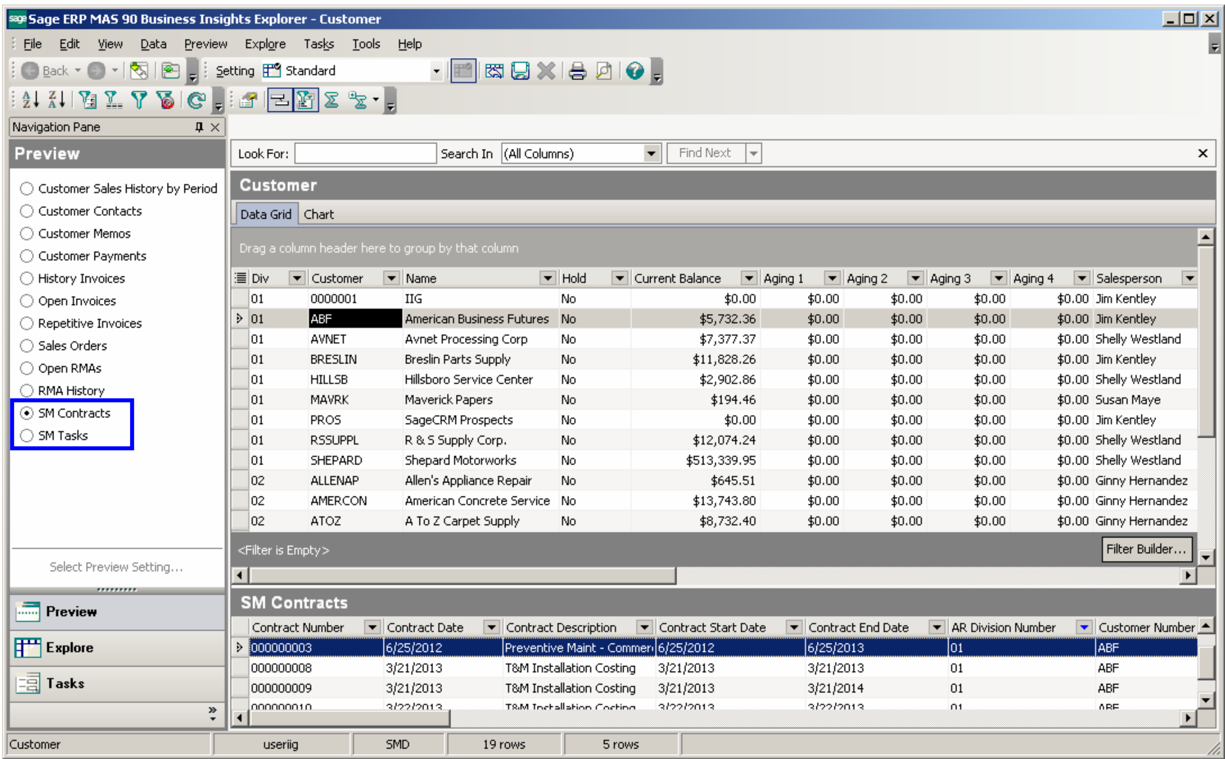
If the generated Payroll Data Entries are **Cleared** in the **Pay Cycle** program, the corresponding batch will be restored from the history.

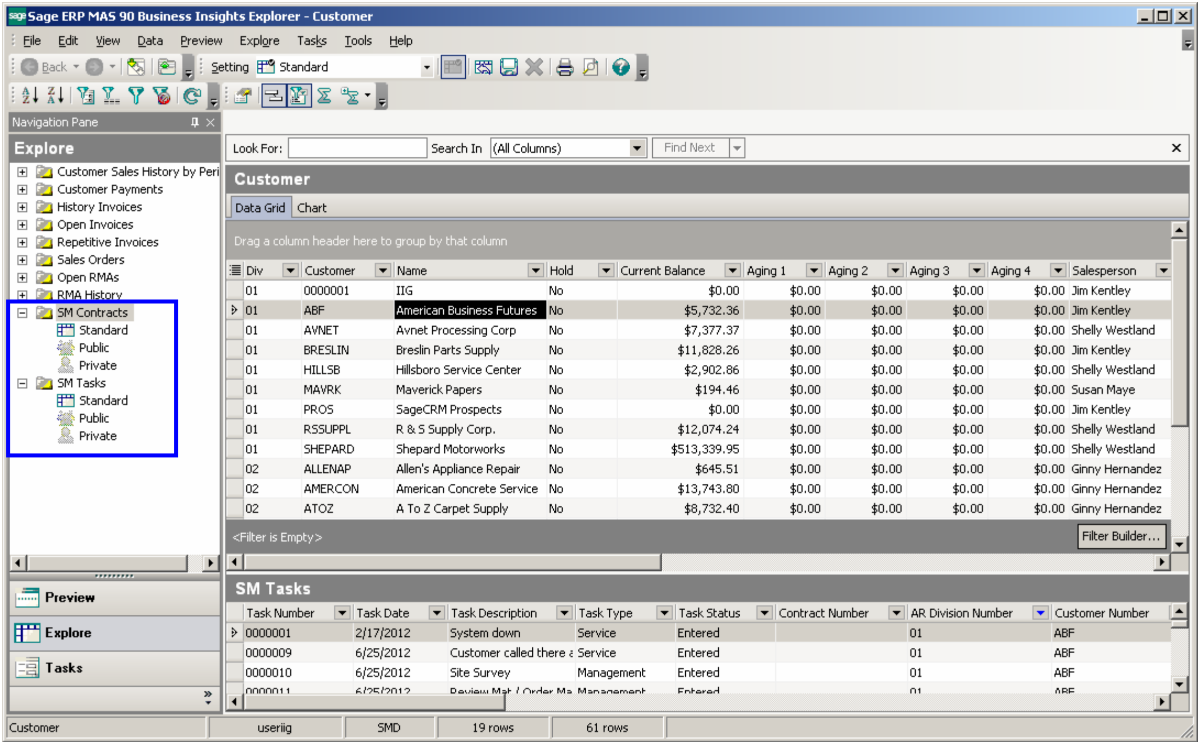

Sage ERP MAS 90
S/M Payroll Batch 101013SMD, BATCH_ASMD is Restored.
OK

Business Insights Explorer

A/R Explore

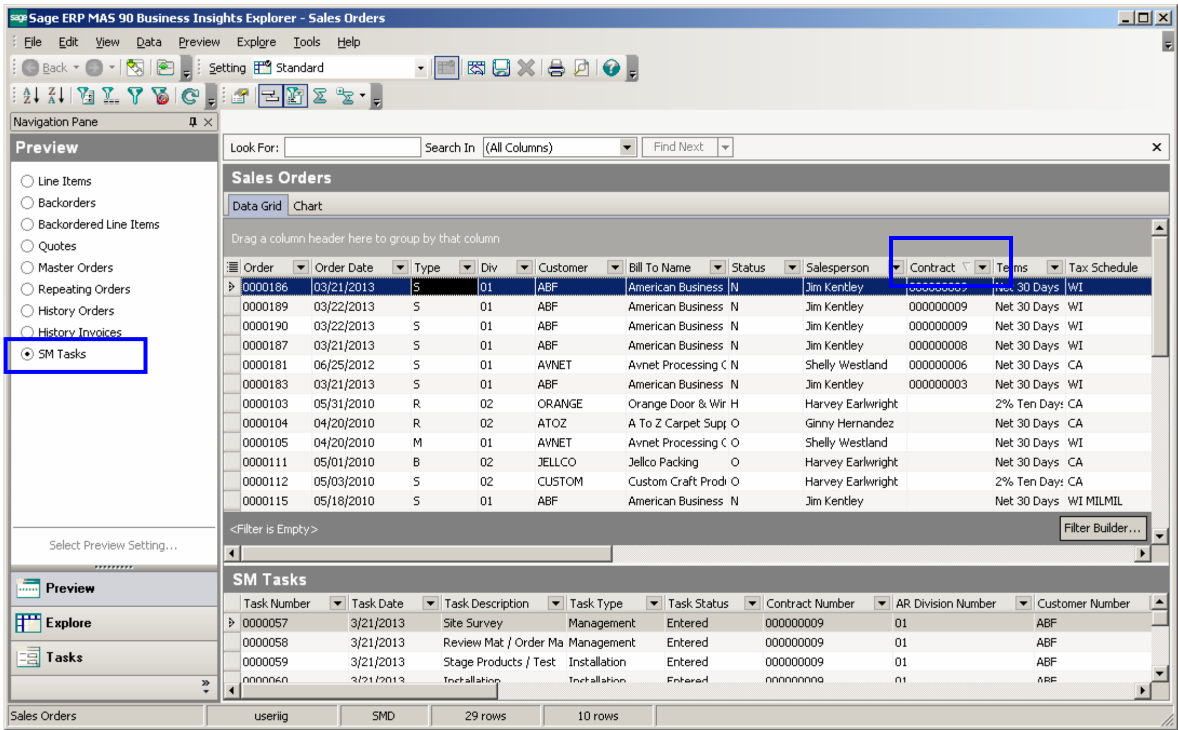
The **SM Contracts** and **SM Tasks** items have been added to the **Preview** and **Explore** navigation panes of the **AR Customer View** program.

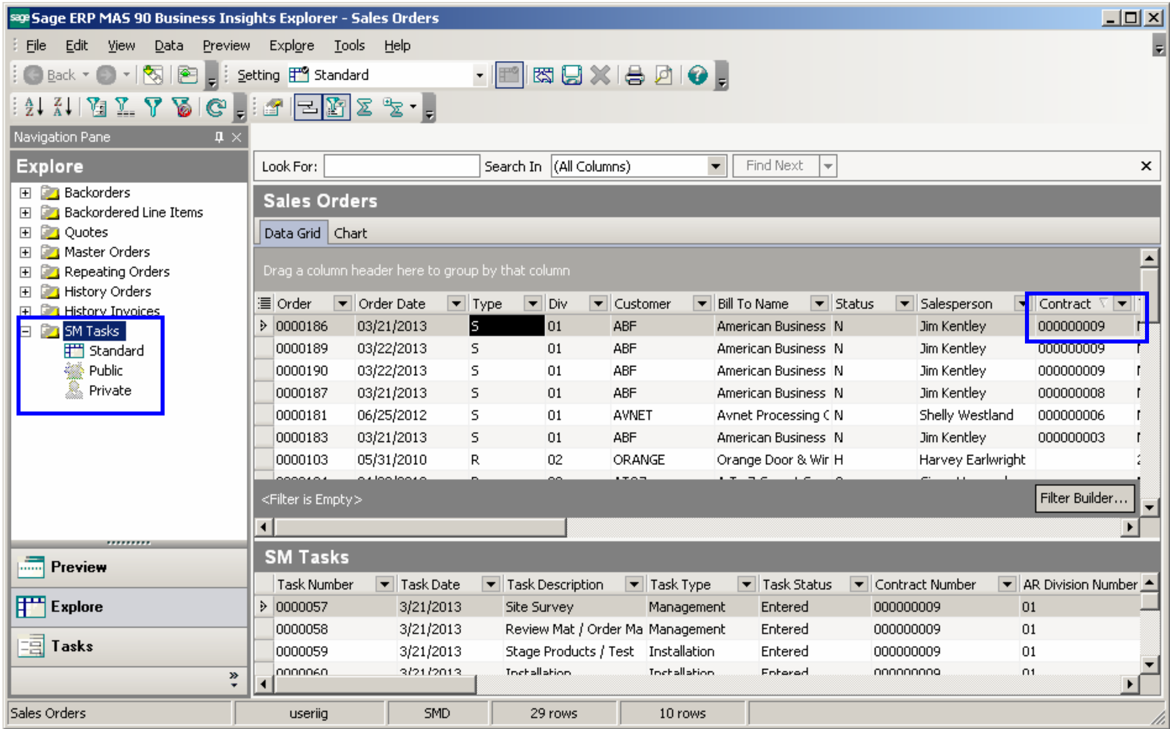



Sage ERP MAS 90 Business Insights Explorer - Customer
File Edit View Data Preview Explore Tasks Tools Help
Back Setting Standard
Navigation Pane
Explore
Customer Sales History by Peri
Customer Payments
History Invoices
Open Invoices
Repetitive Invoices
Sales Orders
Open RMAs
RMA History
SM Contracts
Standard
Public
Private
SM Tasks
Standard
Public
Private
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 Aging 4 Salesperson
01 0000001 IIG No $0.00 $0.00 $0.00 $0.00 $0.00 Jim Kentley
01 ABF American Business Futures No $5,732.36 $0.00 $0.00 $0.00 $0.00 Jim Kentley
01 AVNET Avnet Processing Corp No $7,377.37 $0.00 $0.00 $0.00 $0.00 Shelly Westland
01 BRESLIN Breslin Parts Supply No $11,828.26 $0.00 $0.00 $0.00 $0.00 Jim Kentley
01 HILLSB Hillsboro Service Center No $2,902.86 $0.00 $0.00 $0.00 $0.00 Shelly Westland
01 MAVRK Maverick Papers No $194.46 $0.00 $0.00 $0.00 $0.00 Susan Maye
01 PROS SageCRM Prospects No $0.00 $0.00 $0.00 $0.00 $0.00 Jim Kentley
01 RSSUPPL R & S Supply Corp. No $12,074.24 $0.00 $0.00 $0.00 $0.00 Shelly Westland
01 SHEPARD Shepard Motorworks No $513,339.95 $0.00 $0.00 $0.00 $0.00 Shelly Westland
02 ALLENAP Allen's Appliance Repair No $645.51 $0.00 $0.00 $0.00 $0.00 Ginny Hernandez
02 AMERCON American Concrete Service No $13,743.80 $0.00 $0.00 $0.00 $0.00 Ginny Hernandez
02 ATOZ A To Z Carpet Supply No $8,732.40 $0.00 $0.00 $0.00 $0.00 Ginny Hernandez
<Filter is Empty>
Filter Builder...
SM Tasks
Task Number Task Date Task Description Task Type Task Status Contract Number AR Division Number Customer Number
0000001 2/17/2012 System down Service Entered 01 ABF
0000009 6/25/2012 Customer called there a Service Entered 01 ABF
0000010 6/25/2012 Site Survey Management Entered 01 ABF
Customer userjg SMD 19 rows 61 rows

S/O Explore

The **Contract** column has been added to the main data view of the **Sales Orders View** explore and the **SM Tasks** item has been added to the **Preview** and **Explore** navigation panes to allow displaying tasks that have been generated from Sales Order.





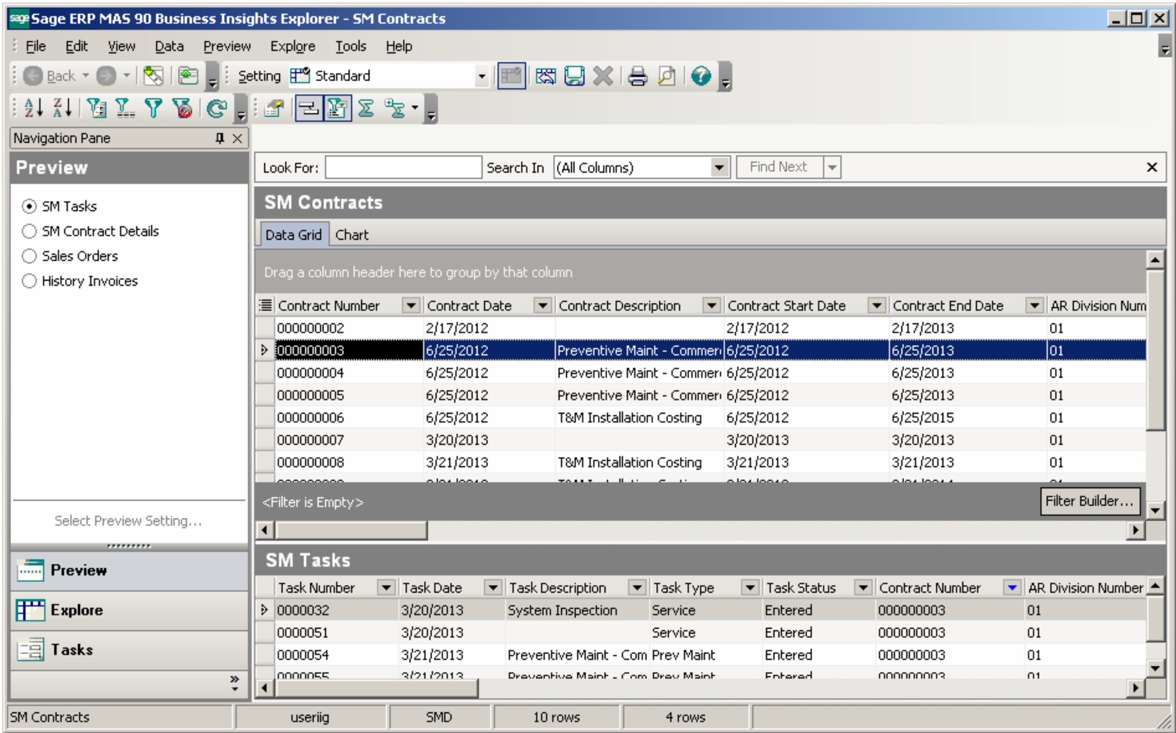
S/M Explore

The **Explore** menu with **Contract** and **Dispatch Views** has 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.

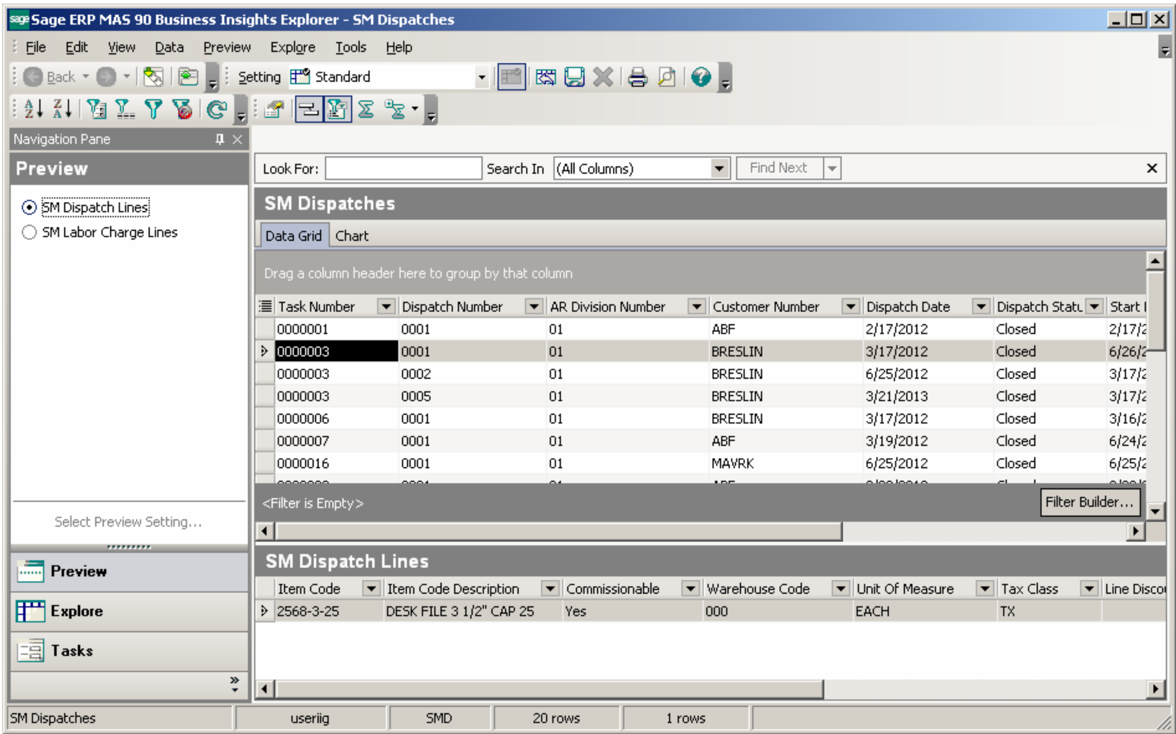
The **Navigation pane** is used to explore data related to the selected view. The main groups on the Navigation pane are: **Explore, Preview**, and **Tasks**. In this pane select the **SM Tasks, SM Contract Details, Sales Order** or **History Invoices** radio button to display corresponding data in the Preview pane.

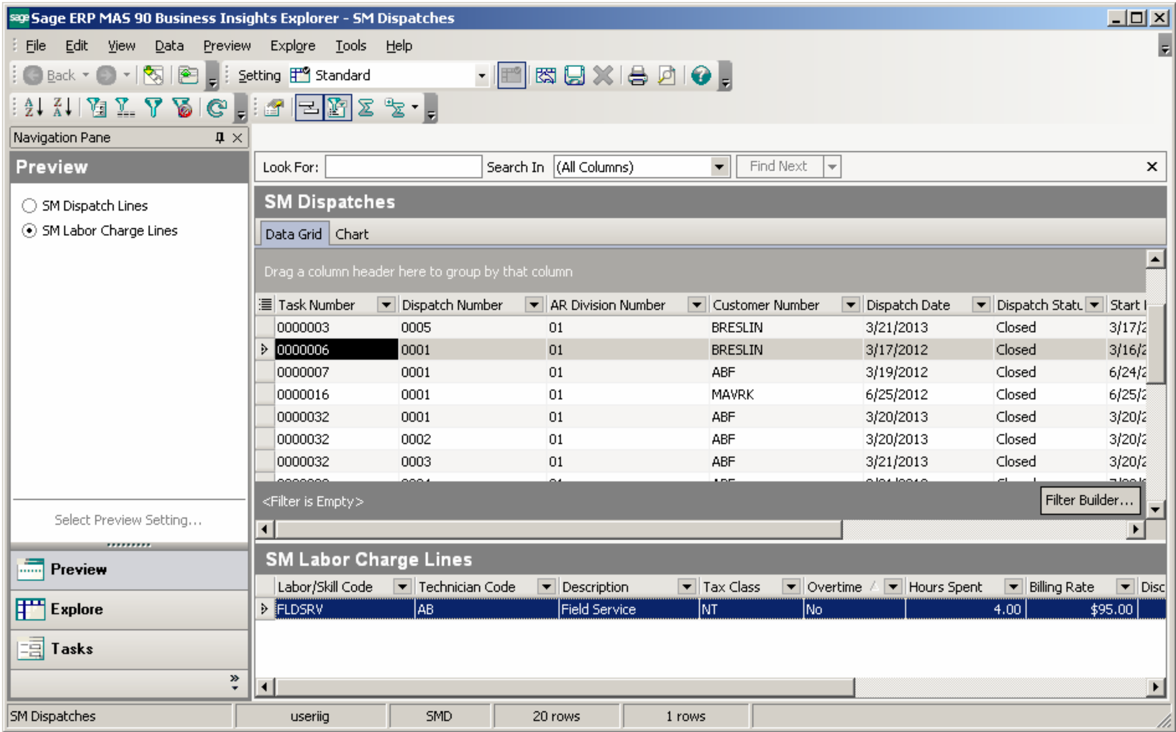
The **Preview pane** is used to view related data from the Data View grid. The data in the Preview pane is filtered by the selected row in the Data View grid and by the option selected in the Preview group on the Navigation pane.


Sage ERP MAS 90 Business Insights Explorer - SM Contracts
File Edit View Data Preview Explore Tools Help
Navigation Pane
Preview
SM Tasks
SM Contract Details
Sales Orders
History Invoices
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 Num
000000002 2/17/2012 2/17/2012 2/17/2013 01
000000003 6/25/2012 Preventive Maint - Commer 6/25/2012 6/25/2013 01
000000004 6/25/2012 Preventive Maint - Commer 6/25/2012 6/25/2013 01
000000005 6/25/2012 Preventive Maint - Commer 6/25/2012 6/25/2013 01
000000006 6/25/2012 T&M Installation Costing 6/25/2012 6/25/2015 01
000000007 3/20/2013 3/20/2013 3/20/2013 01
000000008 3/21/2013 T&M Installation Costing 3/21/2013 3/21/2013 01
<Filter is Empty>
Filter Builder...
SM Tasks
Task Number Task Date Task Description Task Type Task Status Contract Number AR Division Number
0000032 3/20/2013 System Inspection Service Entered 000000003 01
0000051 3/20/2013 Service Entered 000000003 01
0000054 3/21/2013 Preventive Maint - Com Prev Maint Entered 000000003 01
SM Contracts userii SMD 10 rows 4 rows

Dispatch View

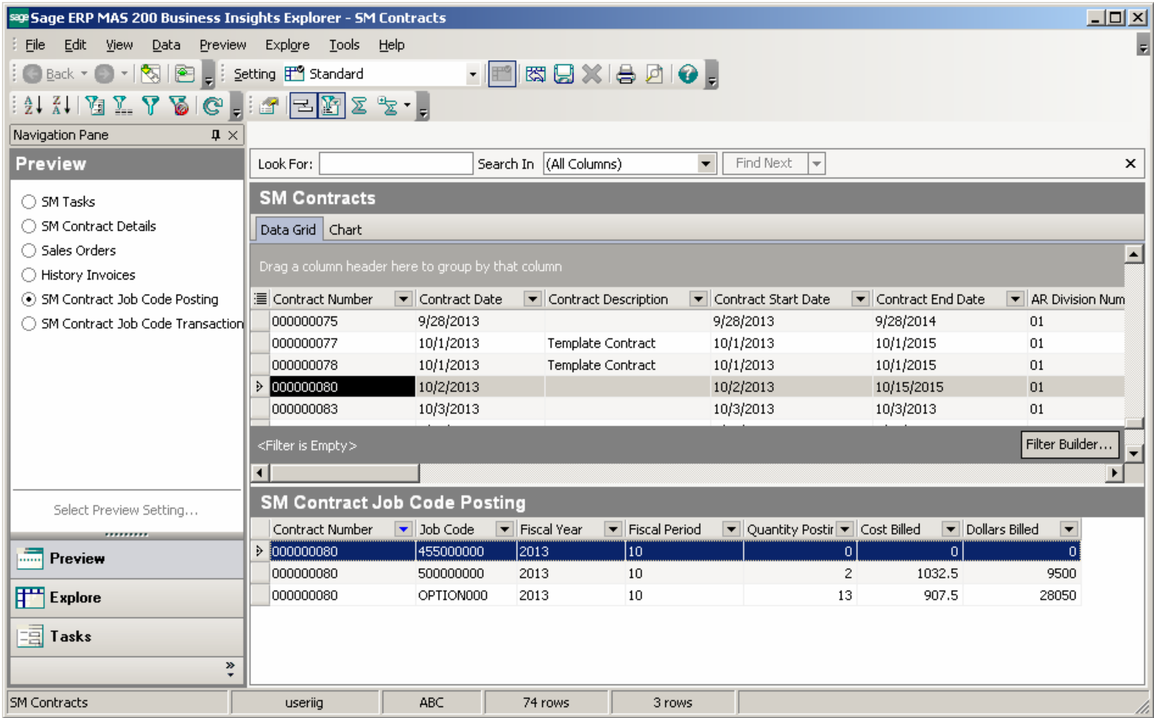
Run the Dispatch View to view the SM Dispatches detail information. Select the SM Dispatch Line to view the line information and select the SM Labor Charge Lines to view the Labor Charge Data Entry lines





Contract View

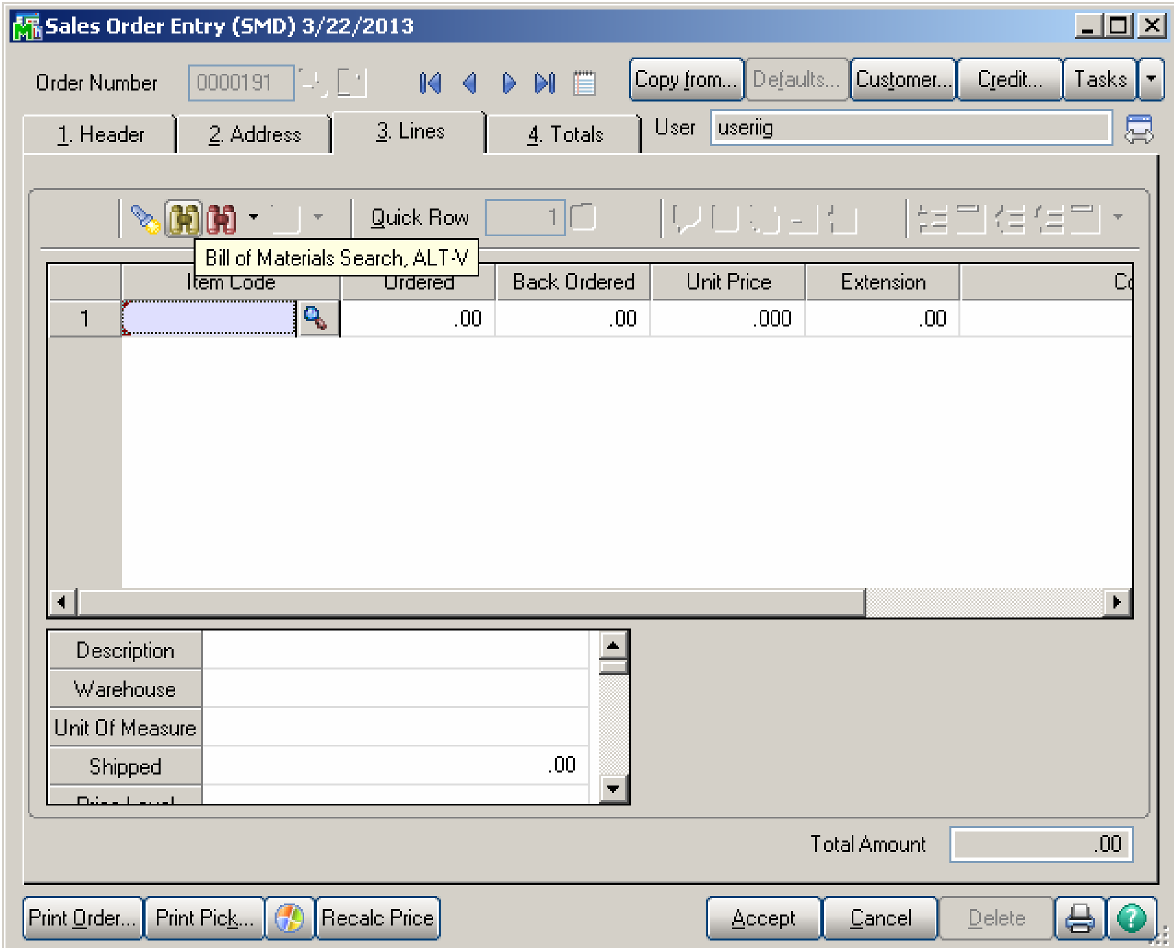
The **SM Contract Job Code Posting** and **SM Contract Job Code Transaction** views have been added to the **Business Insights Explorer Contracts** view to allow the user to get information about the transactions from Contracts posted to jobs without printing reports.



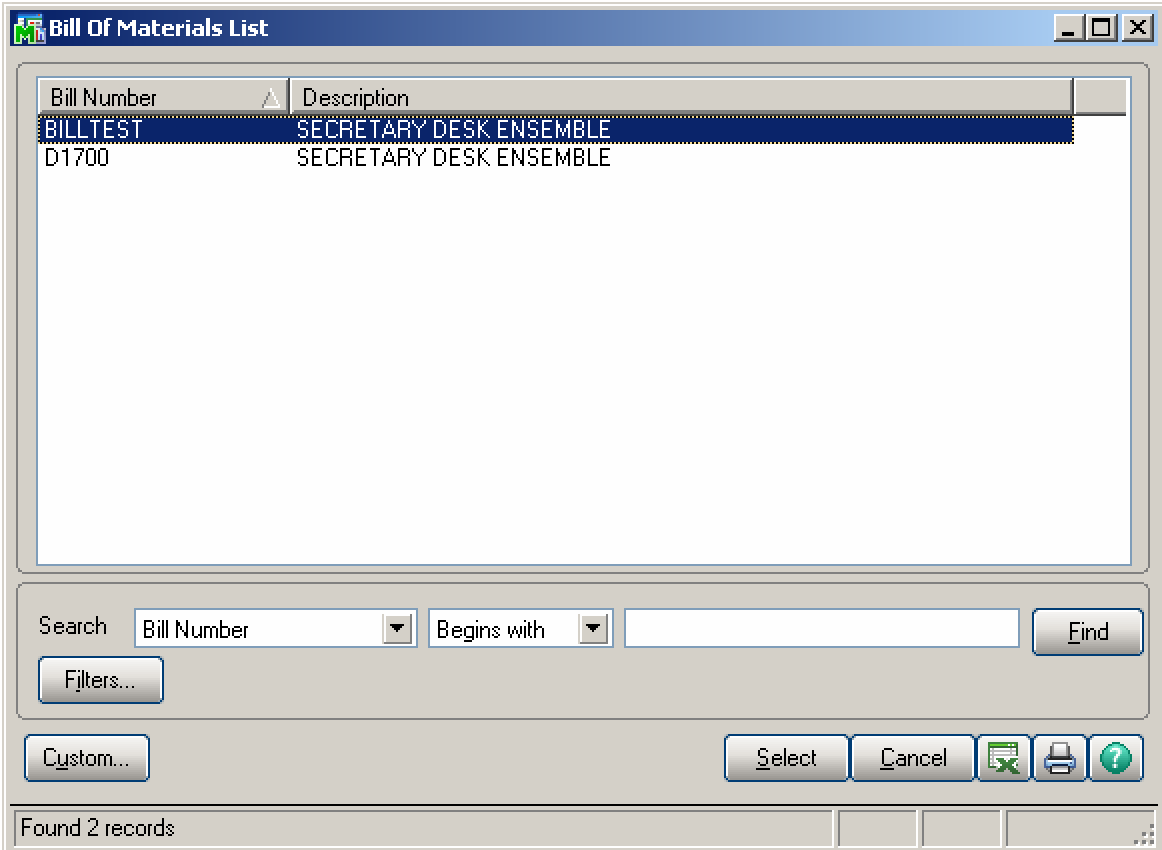
Examples

Sales Order Entry (example from SM Options; Sales Kit Item Number)

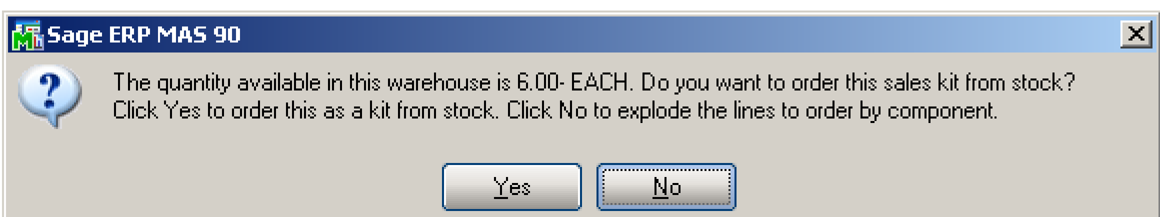
Example:



Click the **Bill of Materials Search** button to select a kit.

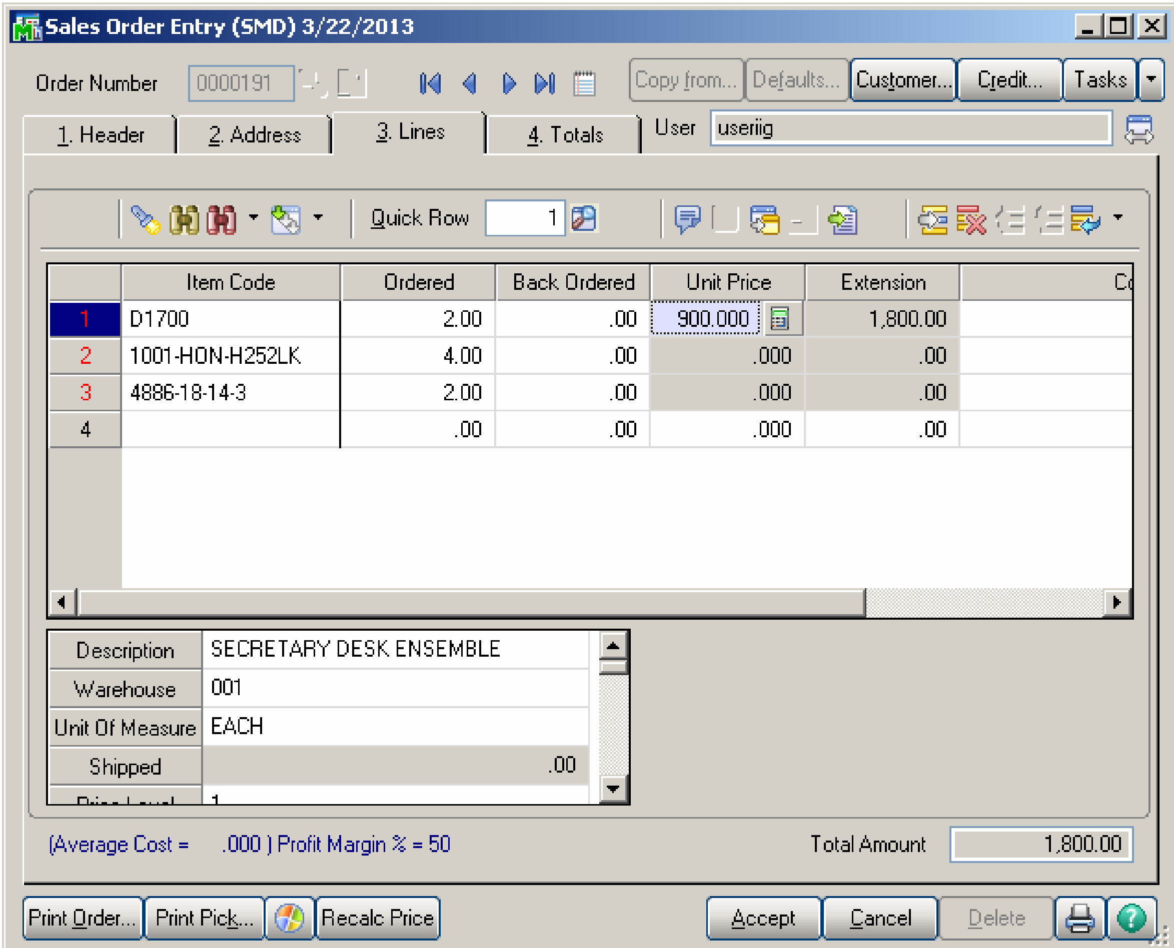


The following message box will be displayed.



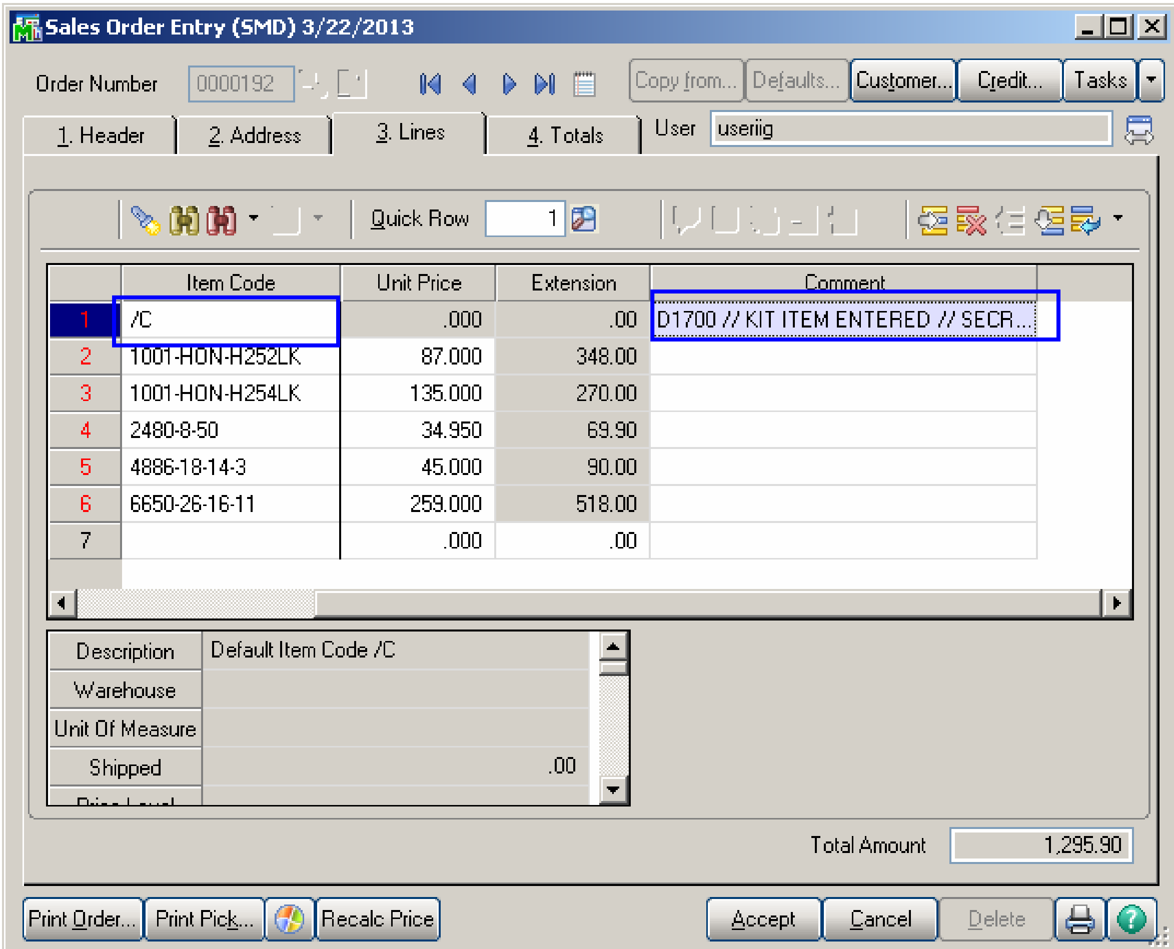
Click **No**.

Enter **Quantity Ordered** and click **OK**.



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.

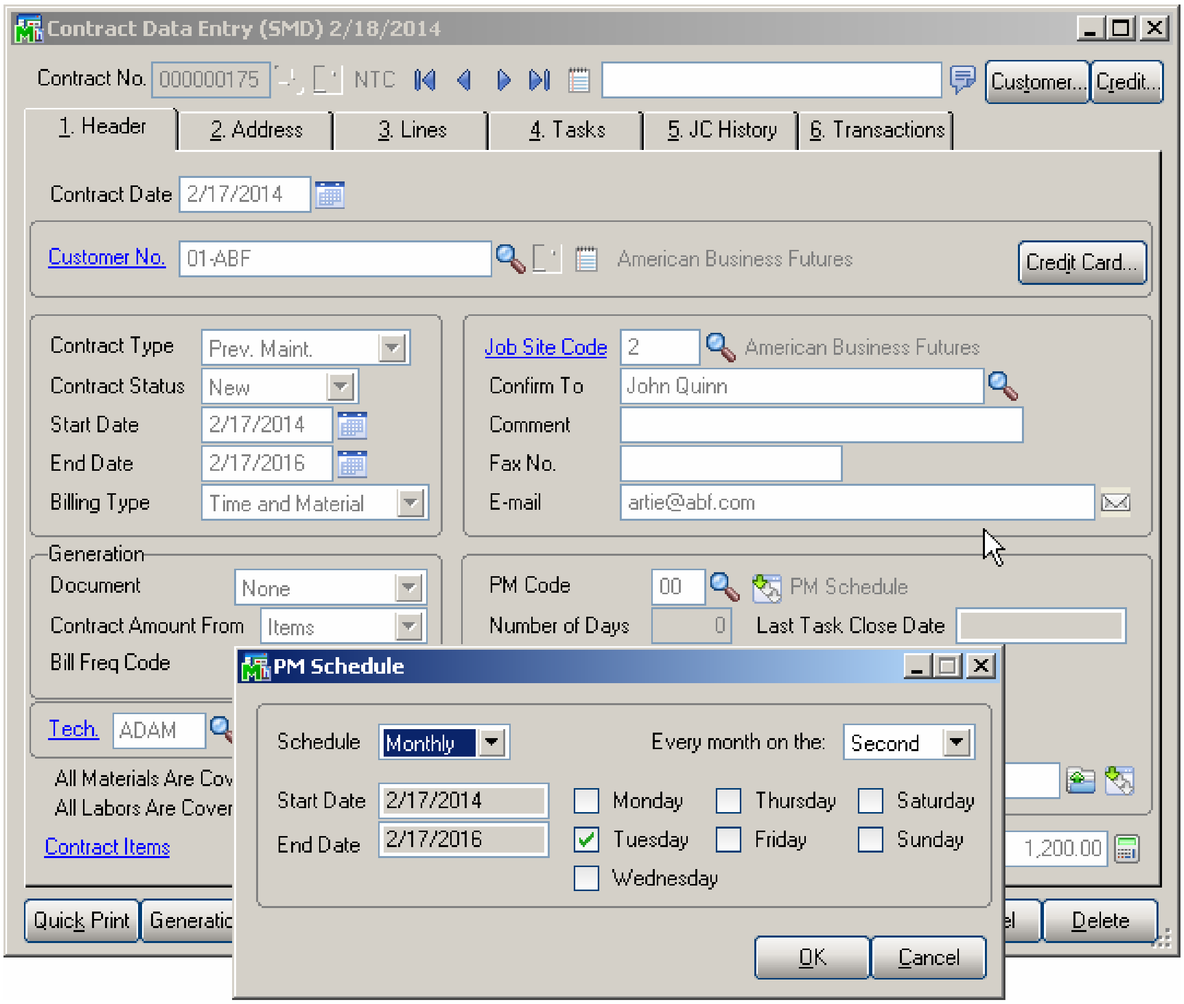


All the kit components are loaded as regular line items with appropriate price and extension information.

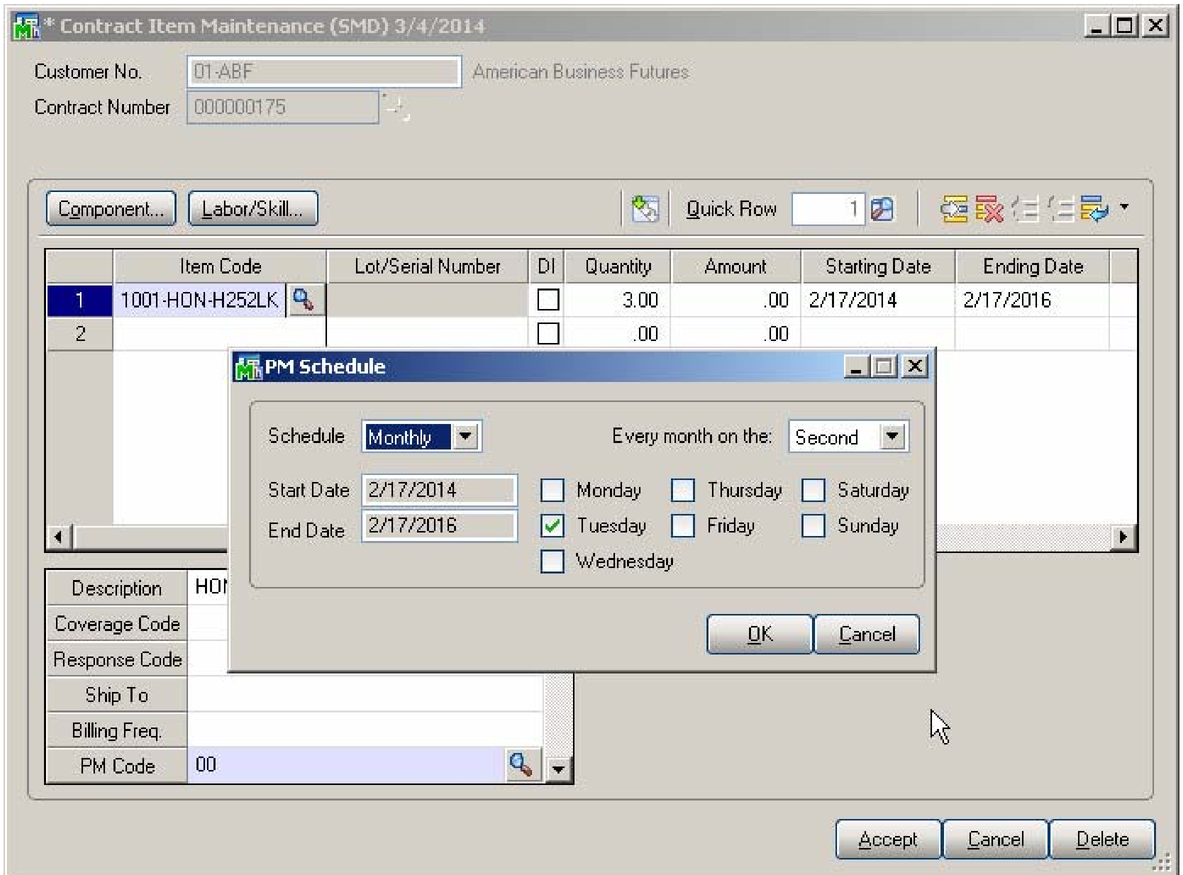
Auto Generate Task Based on PM Schedule

Contract Data Entry

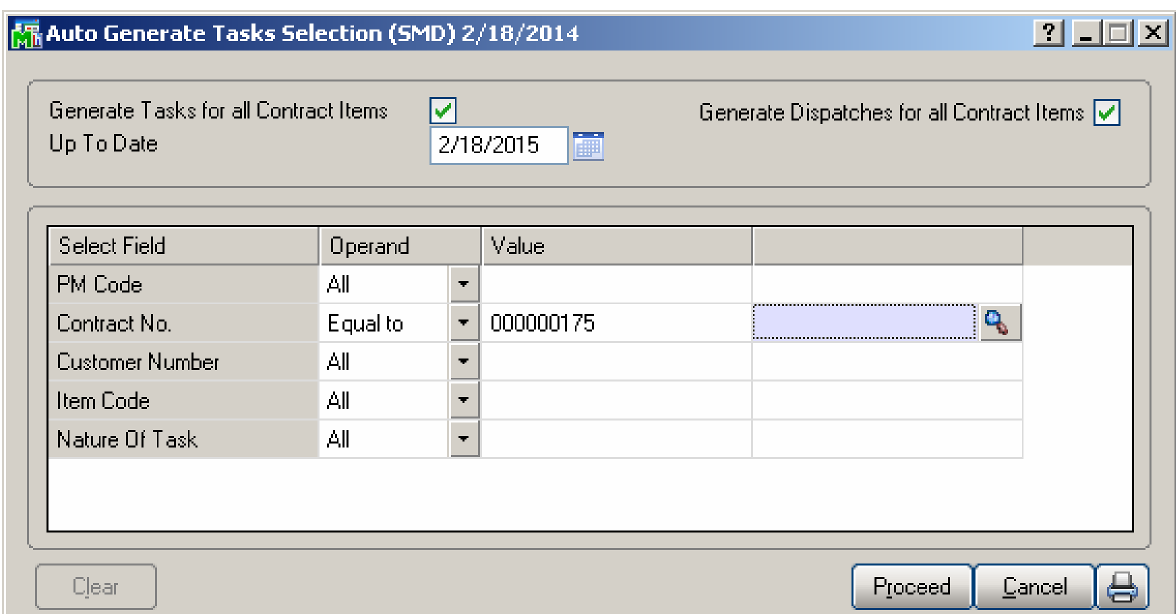
Here is an example of PM Contract with a schedule (2-nd Tuesday of each month) created for preventative maintenance tasks. Based on this schedule preventive maintenance tasks will be generated each month on the 2-nd Tuesday.



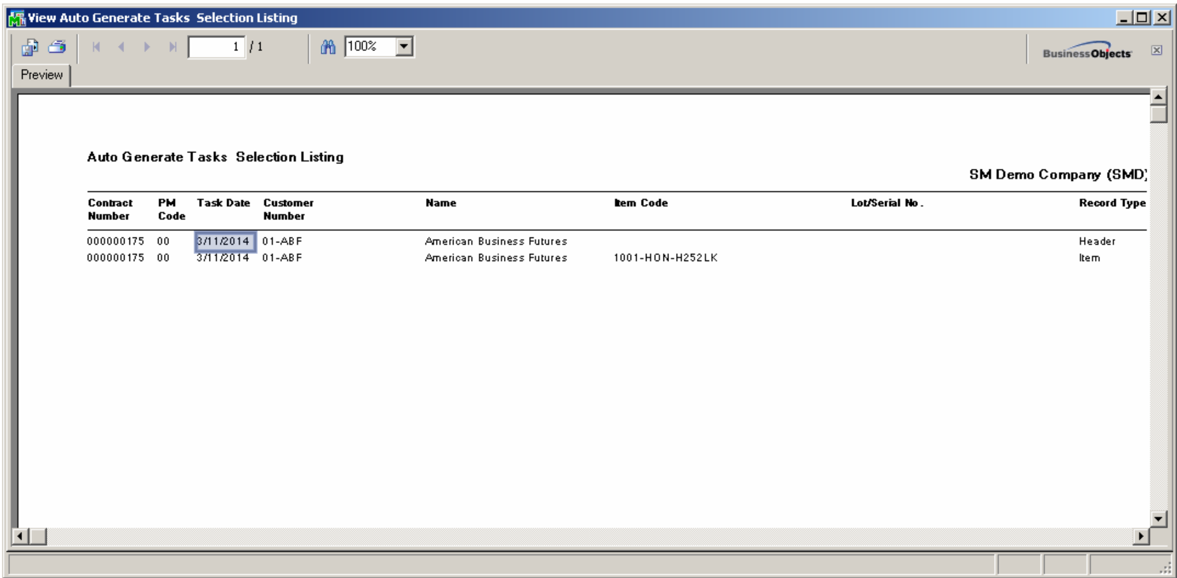
Upon selecting the “PM” code on the Contract Item, the PM Schedule created for the Contract Header is copied to the Contract Item and may be changed for particular Item.



Run the Auto Generate Tasks Selection program and select the Contract:



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:

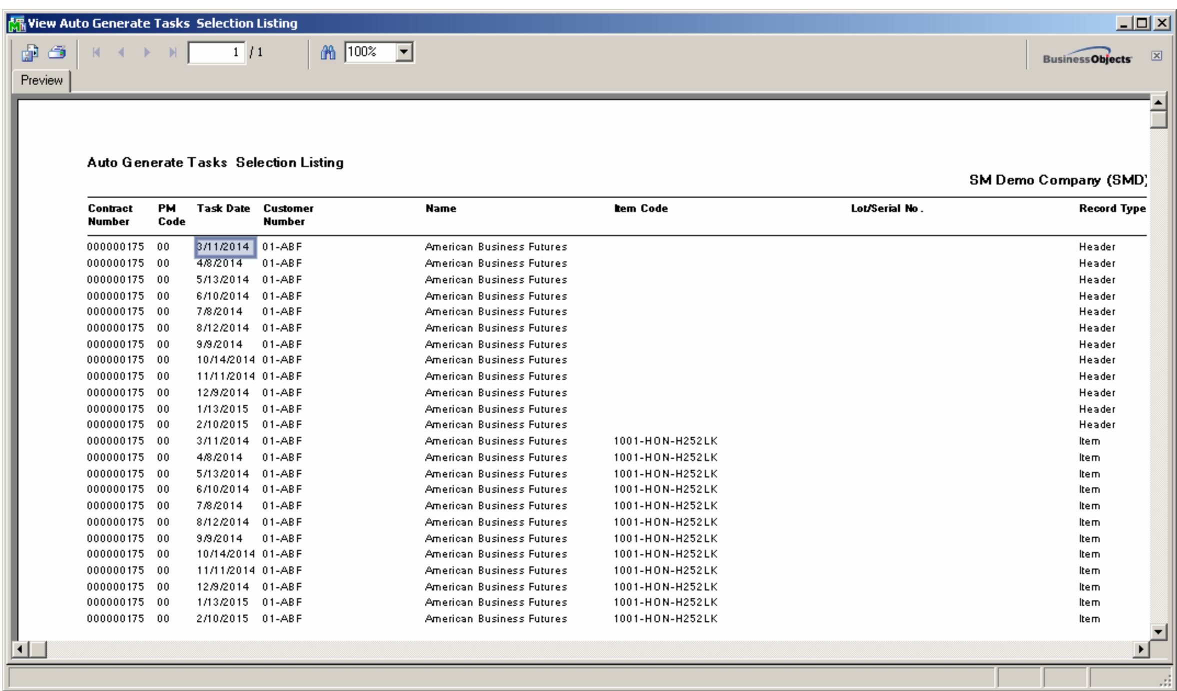


Auto Generate Tasks Selection Listing

SM Demo Company (SMD)

Contract Number	PM Code	Task Date	Customer Number	Name	Item Code	Lot/Serial No.	Record Type
000000175	00	3/11/2014	01-ABF	American Business Futures			Header
000000175	00	3/11/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item

Here is the list of Tasks to be generated for the same Contract (if the "PM Task Generate Based on Task Close Date" option is turned off in the SM Options):

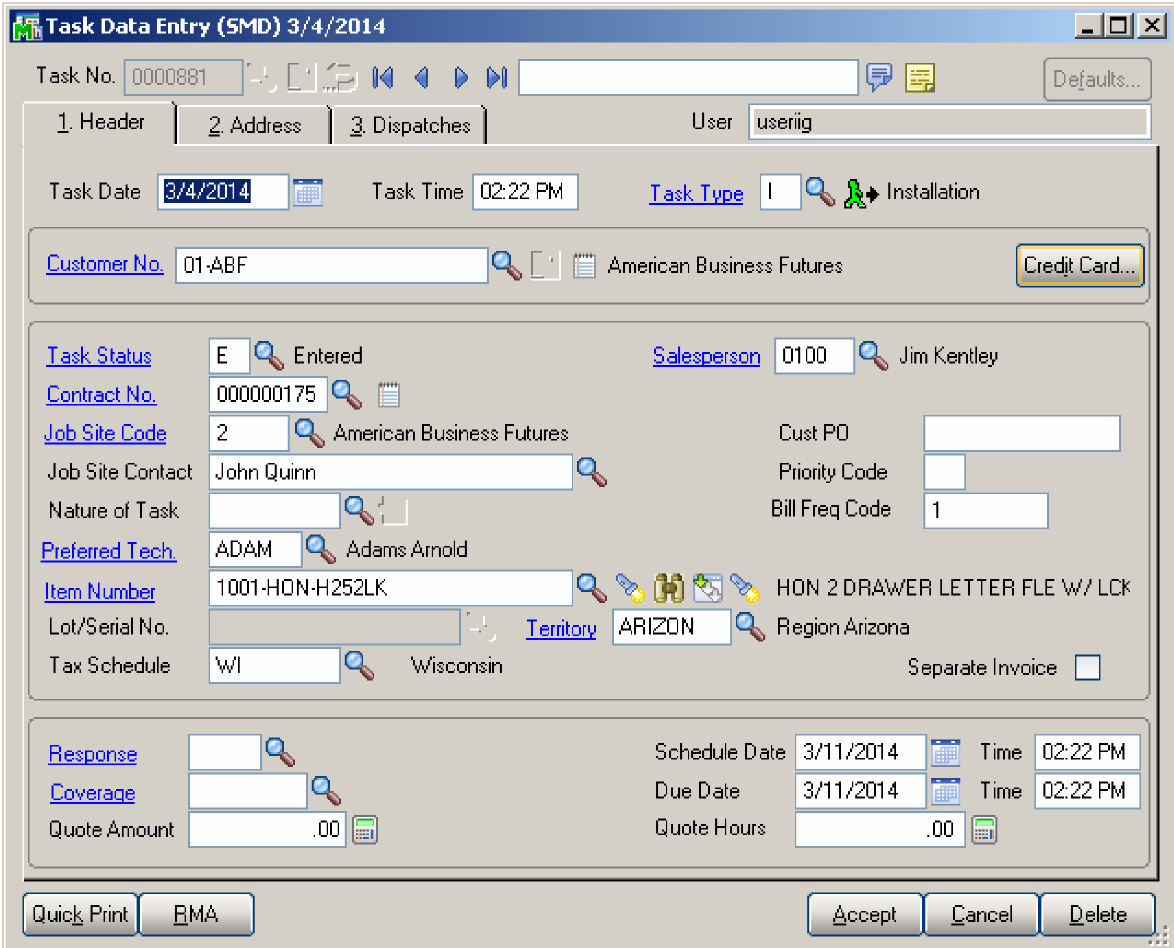


Auto Generate Tasks Selection Listing

SM Demo Company (SMD)

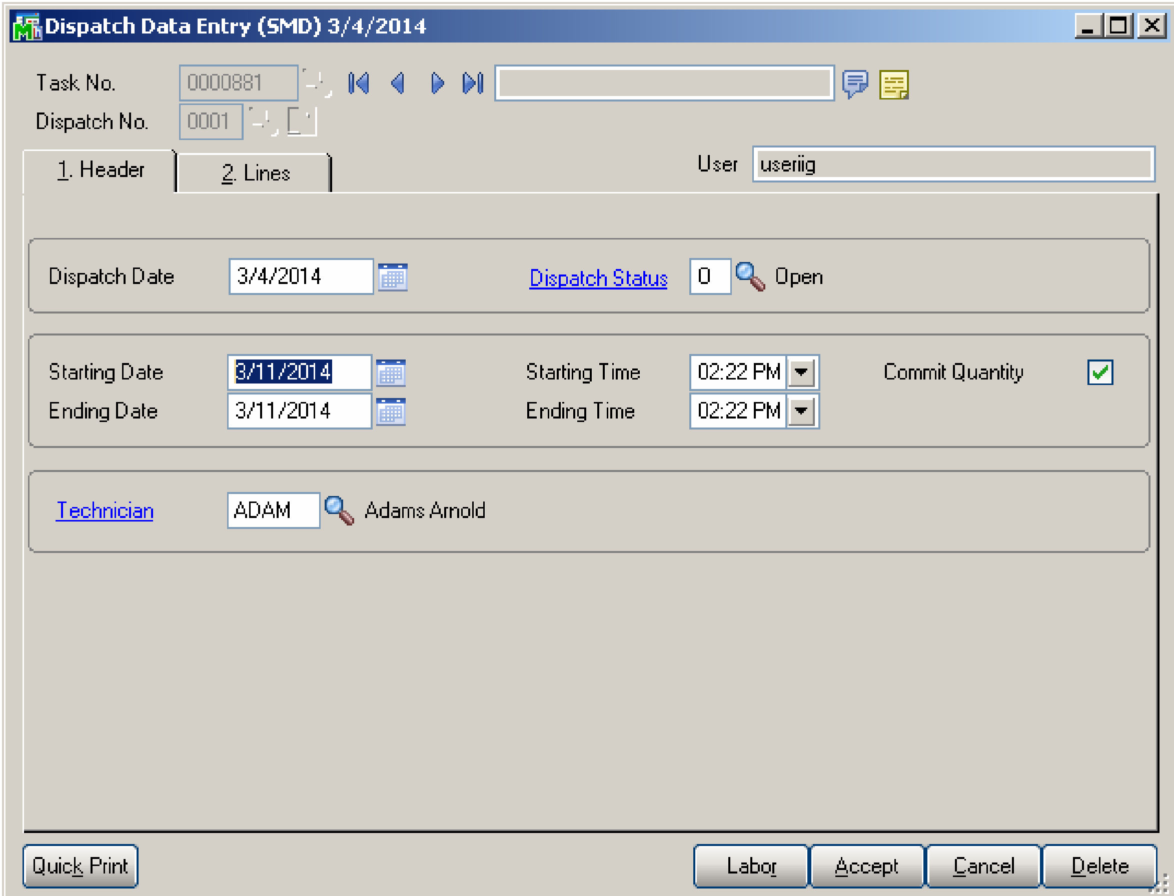
Contract Number	PM Code	Task Date	Customer Number	Name	Item Code	Lot/Serial No.	Record Type
000000175	00	3/11/2014	01-ABF	American Business Futures			Header
000000175	00	4/8/2014	01-ABF	American Business Futures			Header
000000175	00	5/13/2014	01-ABF	American Business Futures			Header
000000175	00	6/10/2014	01-ABF	American Business Futures			Header
000000175	00	7/8/2014	01-ABF	American Business Futures			Header
000000175	00	8/12/2014	01-ABF	American Business Futures			Header
000000175	00	9/9/2014	01-ABF	American Business Futures			Header
000000175	00	10/14/2014	01-ABF	American Business Futures			Header
000000175	00	11/11/2014	01-ABF	American Business Futures			Header
000000175	00	12/9/2014	01-ABF	American Business Futures			Header
000000175	00	1/13/2015	01-ABF	American Business Futures			Header
000000175	00	2/10/2015	01-ABF	American Business Futures			Header
000000175	00	3/11/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	4/8/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	5/13/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	6/10/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	7/8/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	8/12/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	9/9/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	10/14/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	11/11/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	12/9/2014	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	1/13/2015	01-ABF	American Business Futures	1001-HON-H252LK		Item
000000175	00	2/10/2015	01-ABF	American Business Futures	1001-HON-H252LK		Item

All the Tasks being generated are scheduled respectively for the 2-nd Tuesday of each month: 03/11/2014, 4/8/2014, 5/13/2014, etc.
Here is the first Task generated:

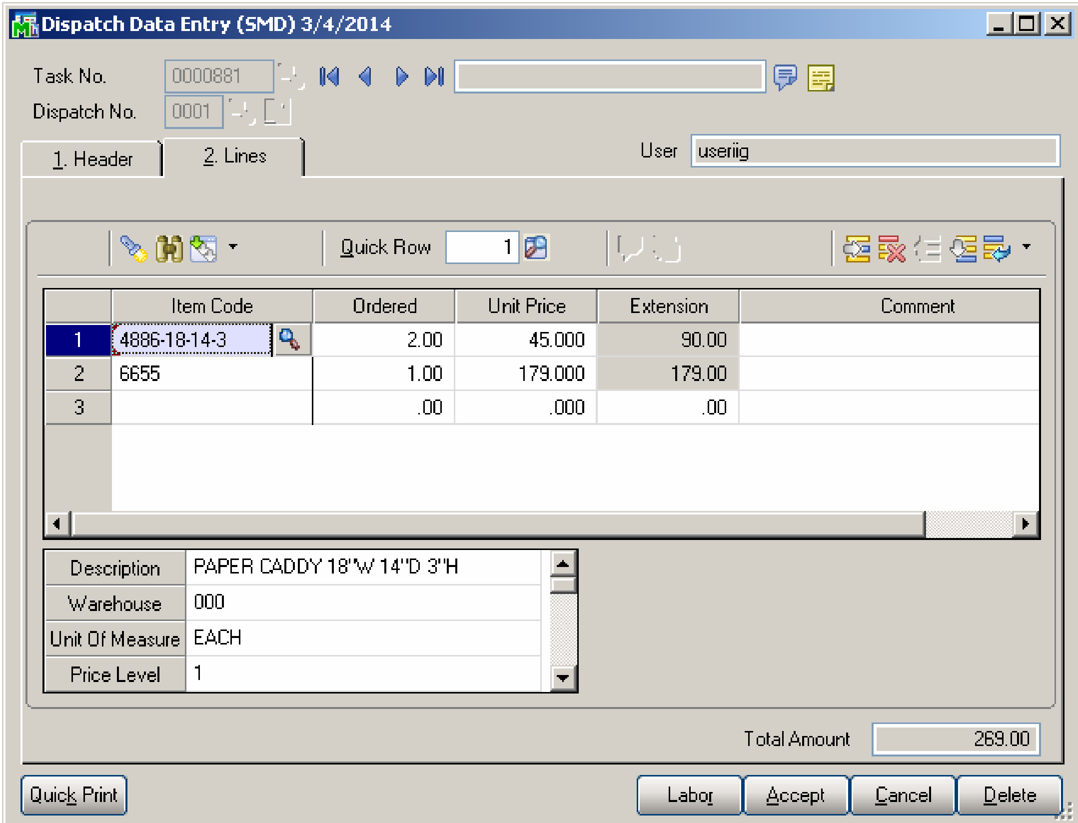


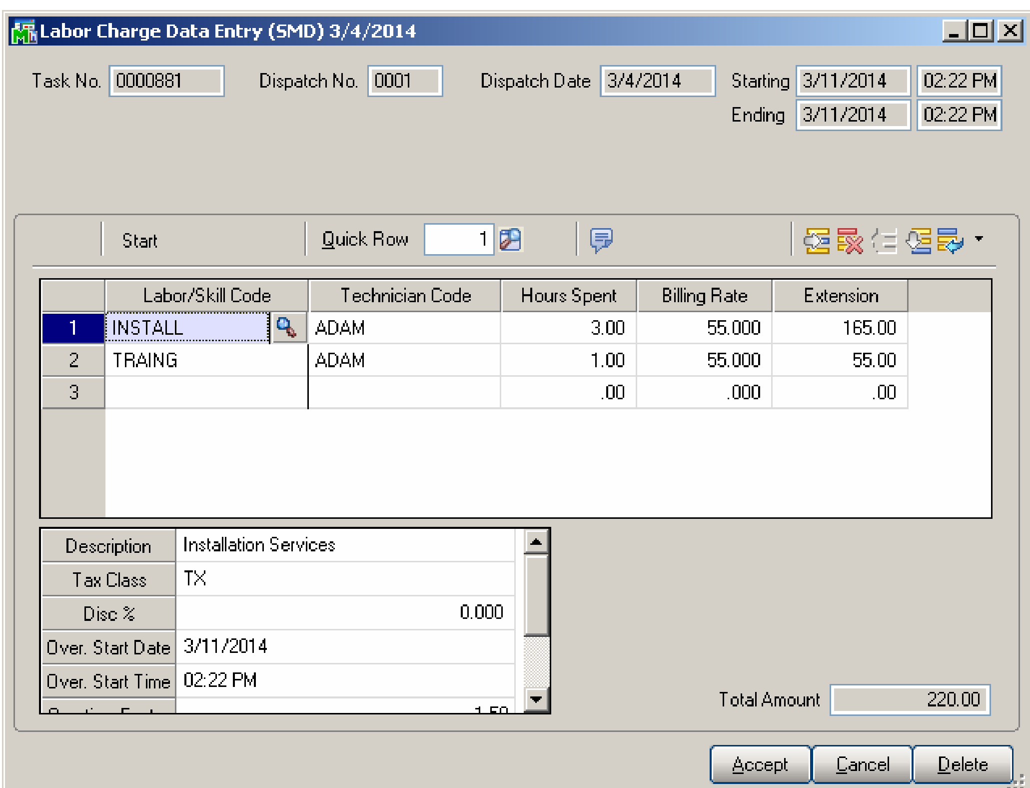
The Scheduled Date is set to the 2-nd Tuesday: 3/11/2013 of March.

Here is the Dispatch created during Task Generation:



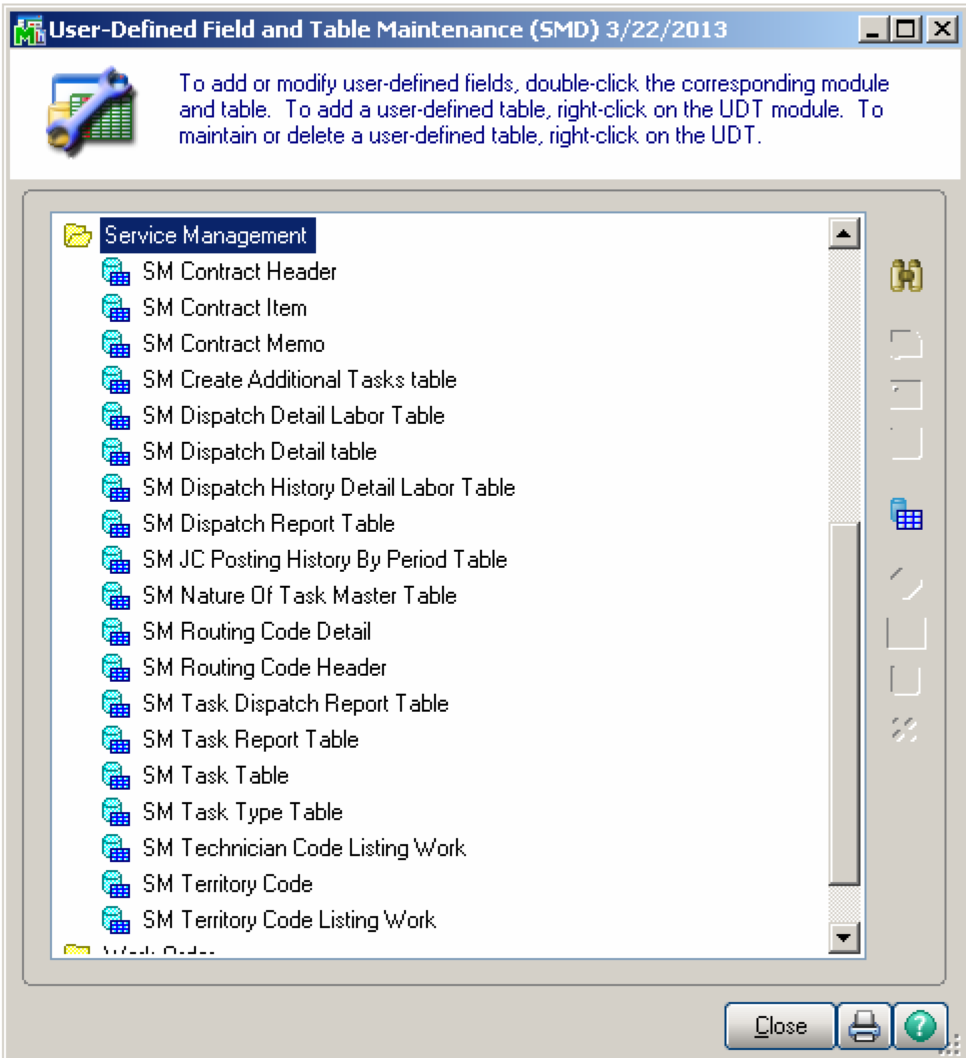
Both Inventory Item and Labor/Skill components assigned to the Contract item in the Contract Entry are loaded respectively into the Dispatch Lines and Labor Charge Data Entry:


Dispatch Data Entry (SMD) 3/4/2014
Task No. 0000881
Dispatch No. 0001
1. Header
2. Lines
User useriig
Quick Row 1
Item Code | Ordered | Unit Price | Extension | Comment
1 4886-18-14-3 2.00 45.000 90.00
2 6655 1.00 179.000 179.00
3 .00 .000 .00
Description PAPER CADDY 18"W 14"D 3"H
Warehouse 000
Unit Of Measure EACH
Price Level 1
Total Amount 269.00
Quick Print
Labor
Accept
Cancel
Delete


Labor Charge Data Entry (SMD) 3/4/2014
Task No. 0000881
Dispatch No. 0001
Dispatch Date 3/4/2014
Starting 3/11/2014 02:22 PM
Ending 3/11/2014 02:22 PM
Start
Quick Row 1
Labor/Skill Code | Technician Code | Hours Spent | Billing Rate | Extension
1 INSTALL ADAM 3.00 55.000 165.00
2 TRAING ADAM 1.00 55.000 55.00
3 .00 .000 .00
Description Installation Services
Tax Class TX
Disc % 0.000
Over. Start Date 3/11/2014
Over. Start Time 02:22 PM
Total Amount 220.00
Accept
Cancel
Delete

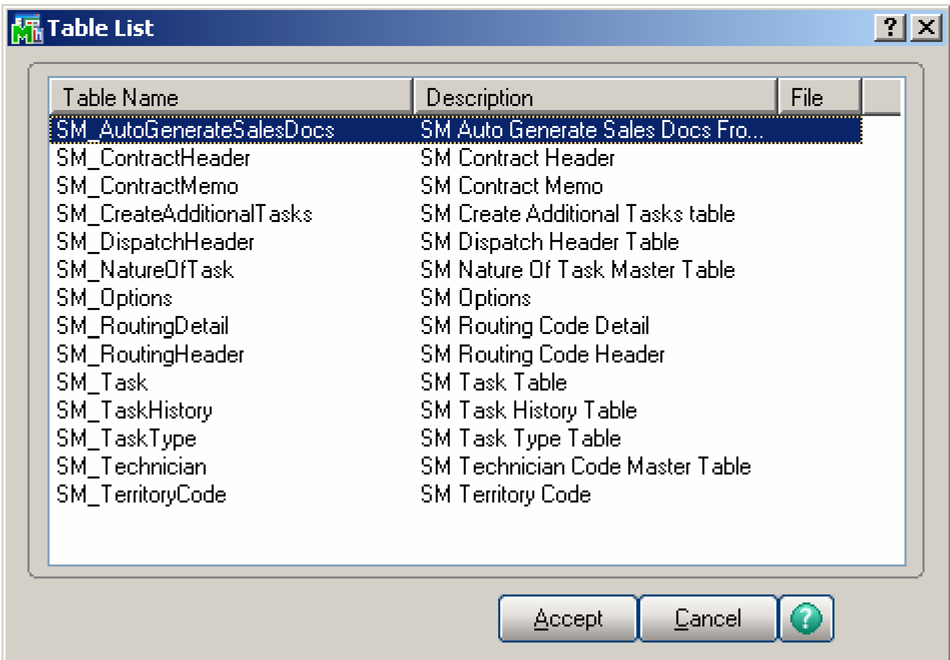
Custom Office

The following **SM Module** tables are available in the **User-Defined Field and Table Maintenance:**



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: