



Service Management For Sage 100 2015

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Installation Instructions and Cautions

PLEASE NOTE: SAGE 100 must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 installation and setup now; then allow any updating to be accomplished automatically.

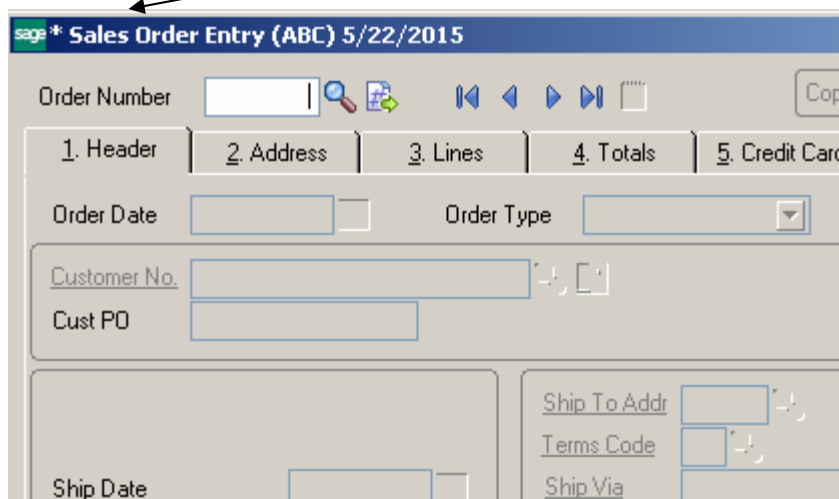
Once SAGE 100 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

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

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

But wait! BEFORE you run **Customizer Update**, it is **very important** that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update.

Custom Office is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.



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

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

Registering IIG products

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

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

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

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	5.10		AAAAAAAAAAAAAAAA	BBBBB
IIG Enhancement	5.20		AAAAAAAAAAAAAAAA...	BBBBB

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.

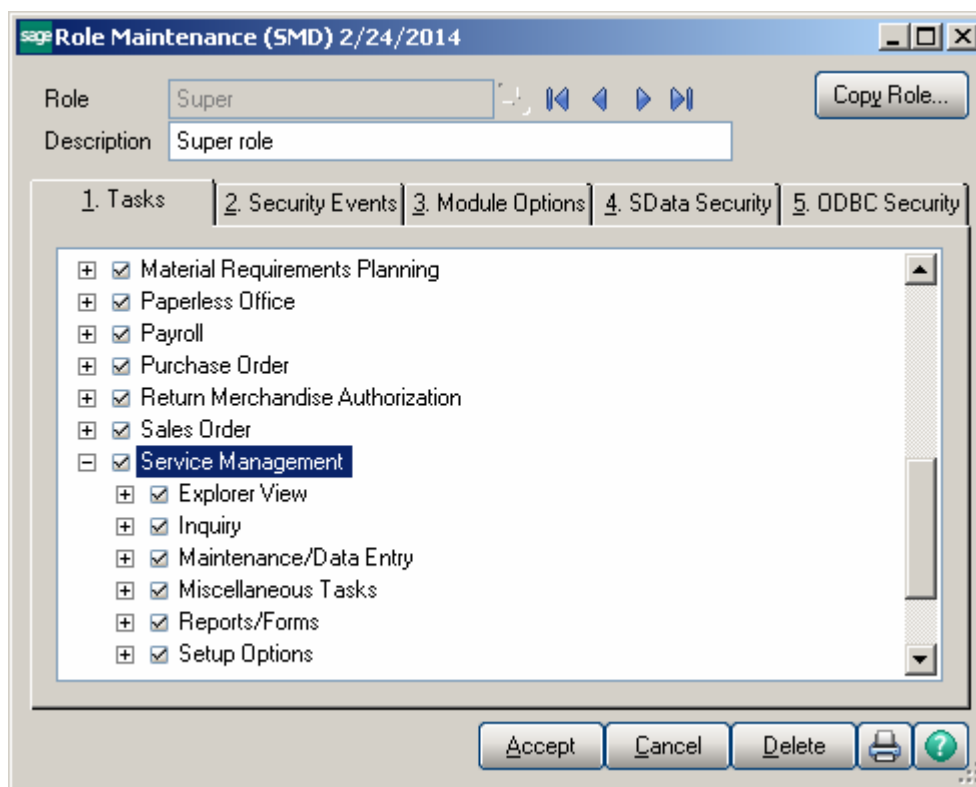
ODBC Security

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	5.10
A/R	Y	5.10
S/O	Y	5.10
A/P	Y	5.10
P/O	Y	5.10

2. Necessarily refer to the steps described in the [Installing Service Management](#) section or the “SMP2015 \Doc\Installation Instructions for SMP.txt” file

Installing Service Management

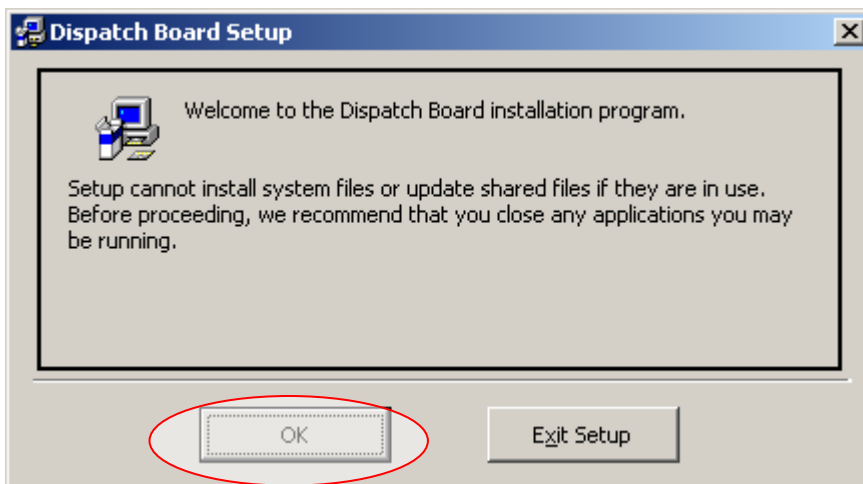
Note: If you are not going to use the SM Dispatch Board, you may start installation from step 2.

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.

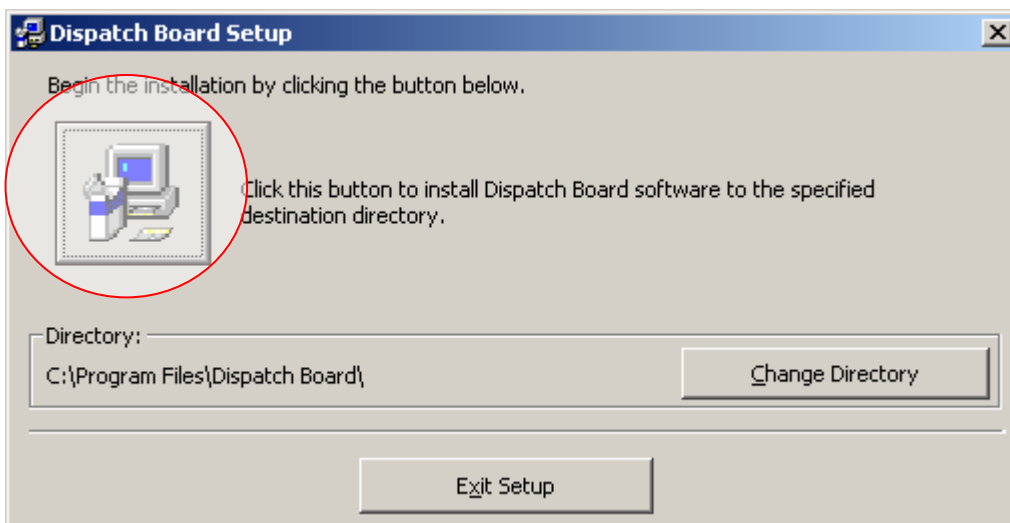
If on Vista, Win7 or Windows 2008 answer Yes on the Windows security prompt to allow the program to install.



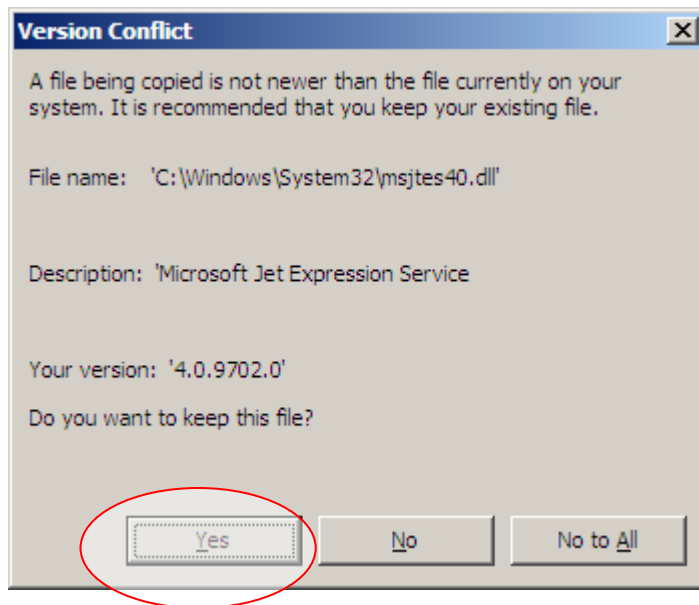
Press OK to proceed with installation.

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.

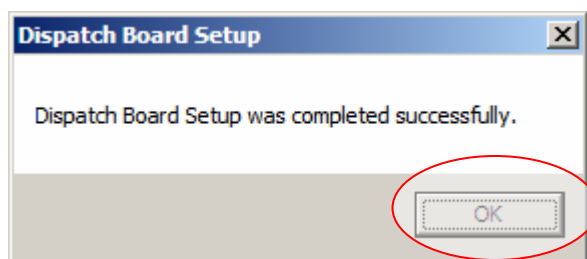


1.3 The following prompt appears if some DLL files being installed during this installation are older than the ones existing in your system:



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.

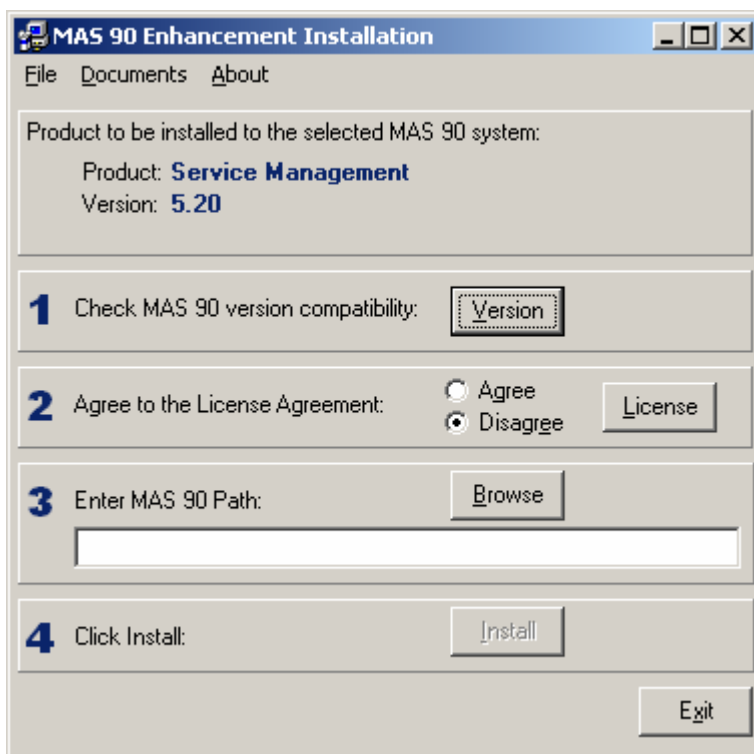
1.4 Once the Dispatch Board installation program finishes the following message appears. Click the OK button to exit the installation program.



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 **SMP2015** folder.
- 2.3 Run **Setup.exe**.

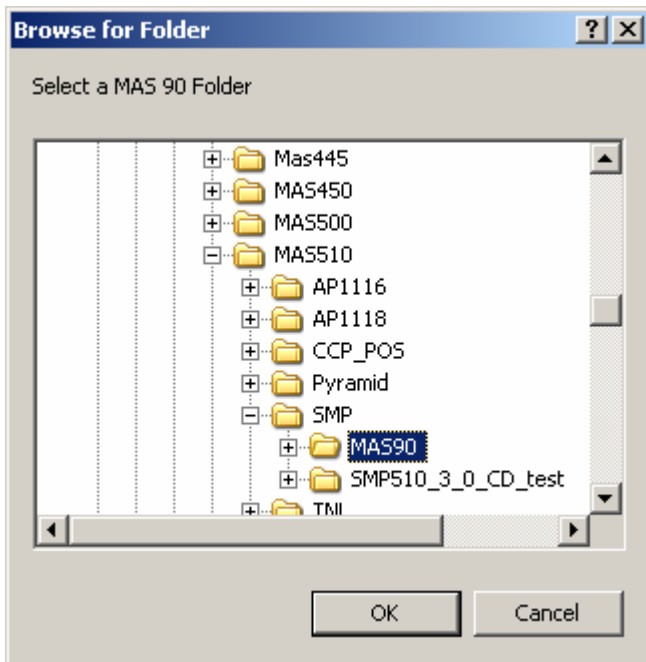
Running SETUP.EXE begins the installation process. The installation screen will look similar to this:



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

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

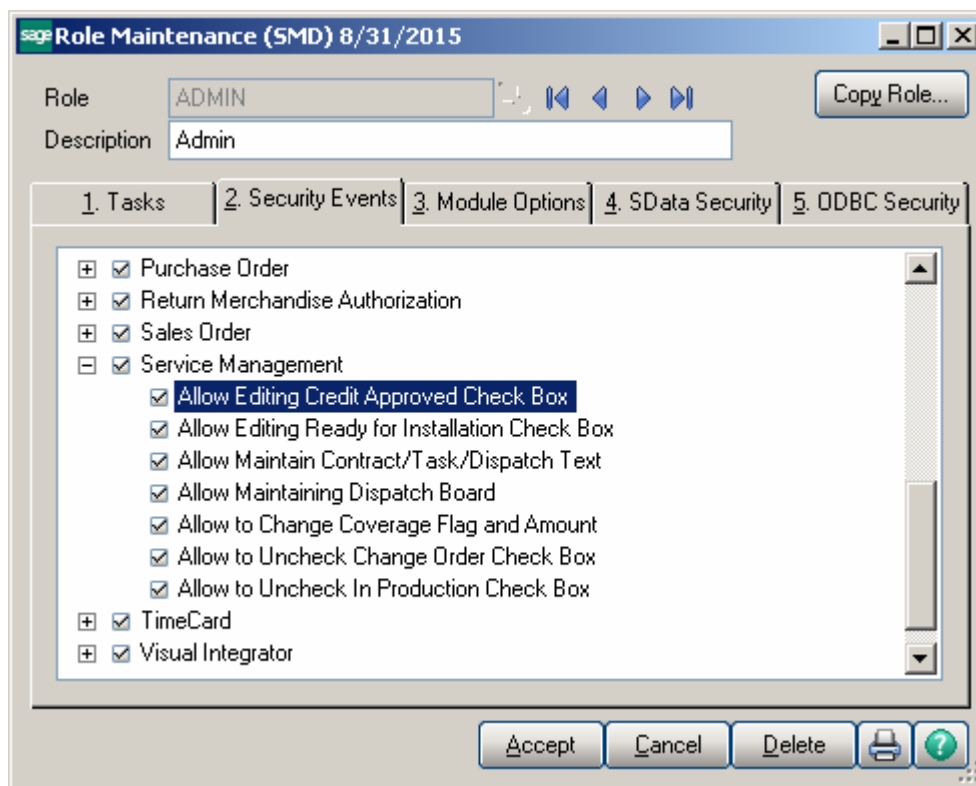
3. Open the **IIG_Dll_CD** and run the **Setup.exe** to install and register some DLL(s) and OCX(s) needed for SM proper functionality. Follow on-screen instructions for installation.

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 Maintain Dispatch Board** , **Allow to Change Coverage Flag and Amount** , **Allow to Uncheck Change Order Check Box** and **Allow to Uncheck In Production Check Box** security events have been added to the **Service Management** module. Select the check box next to a specific security event to assign it for the current role. Clear check boxes to specify which security events are not assigned for the current role.



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

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

Allow Maintain Contract/Task/Dispatch Text – if checked, allows the user to maintain the notes (Extended Description) created for Contract, Task and Dispatch Entries. The users assigned to a Role for which the **Allow Maintain Contract/Task/Dispatch Text**

security event is not enabled (checked) cannot edit existing notes, they can append only new notes to the existing one.

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

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

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

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

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.

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

Add Not for Dispatch Status Change - select this checkbox to add a time stamped note to the **Task Text Maintenance** when Dispatch status is changed.

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

Generated Document Line Hours Rounding

Spent Hours Rounding: Closest

Spent Hours Precision in Minutes: 15

Minimum Billed Time: 60

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.

Contract Audit

Contract Changes to Track: All

Track Additions in Detail:

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

Email Sending

E-Mail Sending

Template Code: EMAILDEF Default Email Template

Template Code - select the Email Template Code to be used by default when sending email to the Technician by the **Quick Email** button added on the Task Data Entry.

You may select one from existing Template Codes or create a new Template in the Template Code Maintenance launched by the Template Code hyperlink.

Job Cost Posting

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

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

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

Integrate with Payroll

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

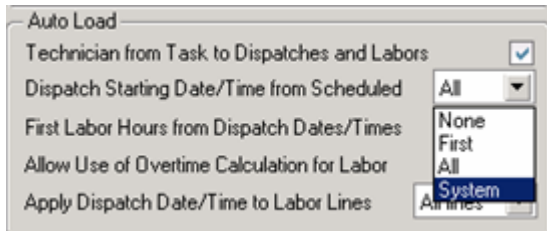
Payroll Overtime Calculation- available options are: **8 hours a day** or **40 hours a week**. This determines how the hours over time are calculated: on the daily or weekly basis.

Redisplay Source Document After Quick Printing

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



Auto Load



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

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

- **None-** the Task's **Scheduled Date/Time** will not be loaded into any of the generated dispatches. In this case the Dispatch Date and dispatch Starting/Ending Dates are defaulted to S/M module current **Accounting Date.**
- **First-** the Task's **Scheduled Date/Time** will be loaded only into the first dispatch generated.
- **All-** the Task's **Scheduled Date/Time** will be loaded into all dispatches being generated.
- **System-** the **Dispatch Starting Date/Time** will be populated with current system date/time.

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

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

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

- **None-** the Dispatch **Date/Time** will 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.

The screenshot shows a dialog box titled "Default Values" with the following settings:

- Task Type: S Service Call
- Dispatch Status: O Open
- Close Dispatches into the: Costing
- Installation Task Status (CA): H Hold A/R

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

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

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

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

The screenshot shows the following options in the dialog box:

- Don't prompt if technician is not setup with the required skill set:
- Don't prompt if technician is busy during the scheduled time:
- Commit Quantity:
- Documents Path: \\Paruyr\F\Mas520\SMP\Documents
- Default Path To Copy From: \\Paruyr\F\Sage\Documents

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).

Documents Path- select the path where the Service Management related documents are stored.

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

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

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

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

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

Click here for an example:

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

Retain Task Entry History	<input checked="" type="checkbox"/>
Contract is Required	<input type="checkbox"/>
Allow Quote Hours in Task Entry	<input checked="" type="checkbox"/>
PM Task Generate Based On Task Close Date	<input checked="" type="checkbox"/>
Generate First Task Based On Contract Starting Date	<input type="checkbox"/>

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.

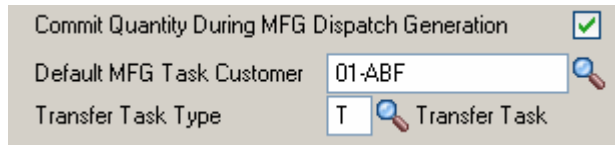
Contract is Required- Select this checkbox to require Contract entry when creating a Task in the **Task Data Entry**. Leave it blank if you are going to create tasks without Contract.

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.

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



The screenshot shows a configuration window with three fields:

- Commit Quantity During MFG Dispatch Generation**: A checkbox that is checked, indicated by a green checkmark icon.
- Default MFG Task Customer**: A text input field containing the value "01-ABF" and a magnifying glass icon to the right.
- Transfer Task Type**: A dropdown menu with "T" selected and a magnifying glass icon to the right. Below the dropdown, the text "Transfer Task" is visible.

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

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

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

Line Entry Tab

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

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

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

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

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

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

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

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

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

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

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

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

- 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.
 - o 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.

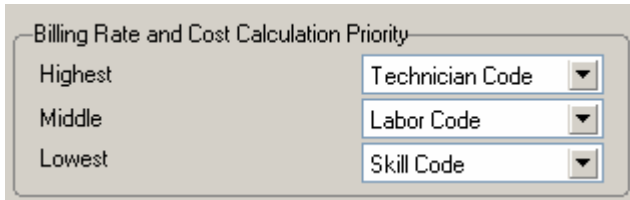
The **Calculate taxes on Labor based on** drop-down box allows the user to define how **Sales Taxes** should be calculated. The following options are available: **None, Dispatch Line, System Default**.

- 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 Labor Line will be carried over to the corresponding line item loaded in the Sales Order or Invoice transaction.
- System Default**-means that the **Tax Class** of corresponding Item (Inventory, Misc, Special) generated upon closing the Dispatch(based on the Labor Billing Presentation) will be applied.

Default Misc. Item – select a default Misc Item to be loaded as Default Labor Code of the Task when new Task is created.

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.

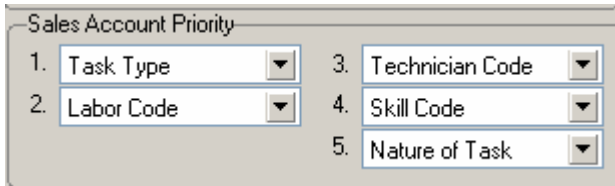
The **Billing Rate and Cost Calculation Priority** group of controls will define the priority by which labor billing rates and costs will be calculated. Rate and Cost can be used from **Technician Code, Labor Code, or Skill Code**.



Billing Rate and Cost Calculation Priority

Highest	Technician Code
Middle	Labor Code
Lowest	Skill Code

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



Sales Account Priority

1. Task Type	3. Technician Code
2. Labor Code	4. Skill Code
	5. Nature of Task

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

Additional Tab

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

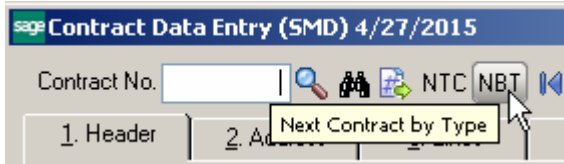
The screenshot shows the 'Service Management Options (SMD) 4/27/2015' window. It has a tabbed interface with '1. Main', '2. Entry', '3. Line Entry', and '4. Additional'. The 'Main' tab is active. The window contains a table for 'Next Contract Number by Type' with 5 rows and 2 columns, all of which are empty. Below this is a 'Web Server' section with an 'Address' field containing 'http://'. At the bottom, there are buttons for 'Manual', 'Accept', 'Cancel', and a printer icon.

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

The screenshot shows the same 'Service Management Options (SMD) 4/27/2015' window, but now with data entered in the 'Next Contract Number by Type' table. The 'SERV' row is highlighted. The 'Web Server' section remains the same. The buttons at the bottom are also present.

Next Contract Number by Type	Contract Type	Next Contract Number
Next Contract Number by Type 1	MAINT	MNT00001
Next Contract Number by Type 2	REP	RP000001
Next Contract Number by Type 3	RENT	RENT00001
Next Contract Number by Type 4	TRAIN	TRAIN0001
Next Contract Number by Type 5	SERV	SERV00001

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

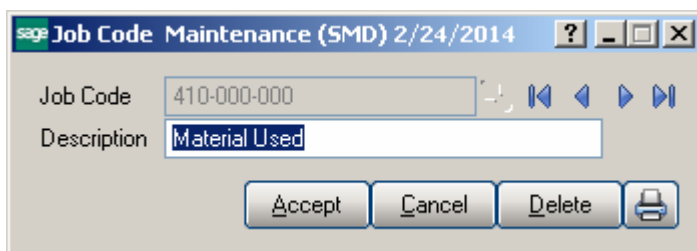


Web Server – this field is intended for specifying the URL of SMP mobile site.

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.

sage Miscellaneous Item Maintenance (SMD) 2/24/2014

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

1. Main | 2. Accounts | 3. History

Standard Unit Price: 1,000.000
 Standard Unit Cost: .000
 Sales Unit of Measure: MTH
 Purchases Unit of Measure:
 Sales Tax Class: NT
 Purchases Tax Class: NT
 Calculate Commission on Sales:
 Image:

Accounts Receivable
 Allow Use in Accounts Receivable: **Apply**
 Post Sales by Division:

Purchase Order
 Allow Use in Purchase Order:
 Allocate Landed Cost:
 Vendor Item Code:

Sales Order
 Allow Use in Sales Order: **IT Item...**
 Allow Trade Discount:
 Drop Ship Item:
 Returns Allowed:
 Internet Enabled:
 Job Code: 500-000-000 **Installation Labor**

Bill of Materials
 Allow Use in Bill of Materials:
 Setup Charge:
 Unit of Measure: MTH

Accept **Cancel** **Delete**

Sage Sales Order Entry (SMD) 2/24/2014

Order Number: 0000362

Copy from... Defaults... Customer... Credit... Tasks

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

Quick Row: 1

	Item Code	Ordered	Back Ordered	Unit Price	Extension	Co
1	/MCONTR	2.00	.00	1,000.000	2,000.00	
2		.00	.00	.000	.00	

PO Number:

PO Req Date:

Job Code: 500-000-000

Create Contract:

Can. Mult. Cont:

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.

The screenshot shows the Sage Skill Code Maintenance (SMD) window for 2/24/2014. The window contains the following fields and controls:

- Skill Code:** PRF
- Description:** Professional
- COGS G/L:** A button to open the Cost Of Goods Sold screen.
- Job Code:** 500-000-000 (with a magnifying glass icon and the text "Installation Labor")
- Sales Account:** 195-00-0000 (with a magnifying glass icon and the text "Software costs (net)")
- Tax Class:** TX (with a magnifying glass icon and the text "Taxable")
- Skill Cost:** 45.00
- Retainer Factor:** 1.00
- Billing Rate:** 85.00
- Overtime Factor:** 2.50
- Buttons:** Accept, Cancel, Delete, Print, and Help.

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).

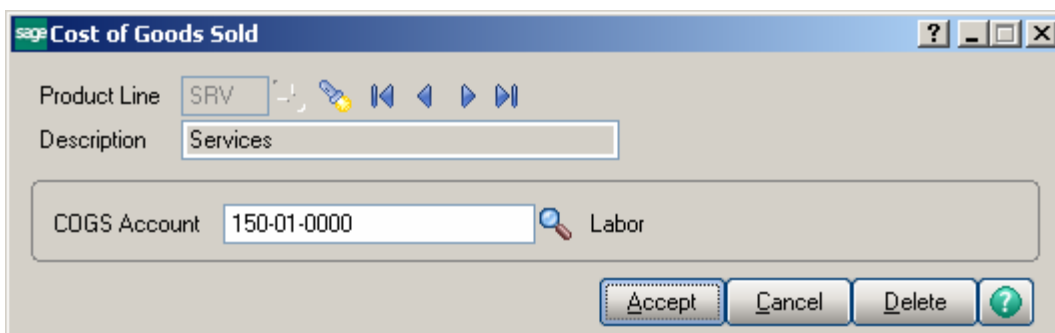
Billing Rate is the billing rates for labor items subject to contract settings or the billing rate calculation priority set-up in **Service Management Options**.

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**.



The screenshot shows a dialog box titled "Sage Cost of Goods Sold". It contains the following fields and controls:

- Product Line:** A dropdown menu with "SRV" selected. To its right are navigation icons: a lightbulb, a double left arrow, a single left arrow, a single right arrow, and a double right arrow.
- Description:** A text box containing the word "Services".
- COGS Account:** A text box containing "150-01-0000". To its right is a magnifying glass icon and the word "Labor".
- Buttons:** At the bottom right, there are four buttons: "Accept", "Cancel", "Delete", and a help button (a green circle with a question mark).

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

The COGS Account specified for current Product Line is used for the generated inventory items if the **Product Line** matches the one set for Inventory Item in the **Service Management Options**.

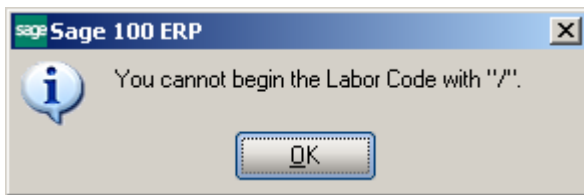
If there is no account specified for that Product Line, the program uses the **COGS Account** specified for blank **Product Line**.

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:



Labor Code	INSTALL		
Description	Installation Services	COGS G/L	
Skill Code	ADM	Administrative	
Job Code	500-000-000	Installation Labor	
Sales Account	195-00-0000	Software costs (net)	
Tax Class	TX	Taxable	
Labor Cost	25.00	Retainer Factor	1.00
Billing Rate	50.00	Overtime Factor	1.50
Regular Earnings	01	Regular	
Overtime Earnings	03	Doubletime	

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

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

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

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

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

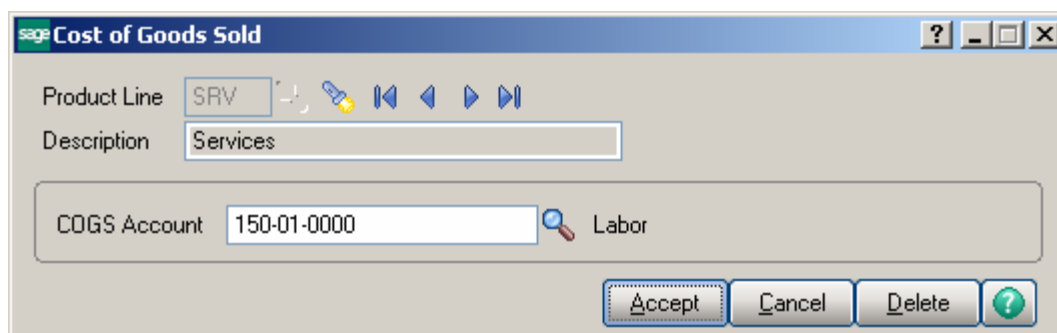
Select the **Regular** and **Overtime Earnings Codes** from the **Earnings List**. Earnings Codes are set in the **Earnings Code Maintenance** under the **Payroll Setup** menu.

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

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

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

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



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

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

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

Technician Code Maintenance

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

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

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

The screenshot shows the Sage Technician Code Maintenance (SMD) window for technician ADAM ADAMS. The window title is "Sage Technician Code Maintenance (SMD) 2/26/2014". The technician code is "ADAM". The last name is "Adams" and the first name is "Arnold". The labor cost is 20.00 and the billing rate is 55.00. The territory code is "ARIZON" (Region Arizona) and the sales account is "115-00-0200" (Inventory - West Warehouse). The employee number is "11-0000100" (THOMAS JERRY A.). The J/C Cost Code Segment Value is "010" and the whse code is "000" (CENTRAL WAREHOUSE). The "Active" checkbox is checked. The "Quick Dispatch Entry Settings" section shows "Set Focus to Field" set to "Labor/Skill Code", "No Messages" unchecked, and "No Auto Budgeting" unchecked. The window includes buttons for "Accept", "Cancel", "Delete", "Print", and "Help".

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

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

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

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

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

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

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

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

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

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

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

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

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

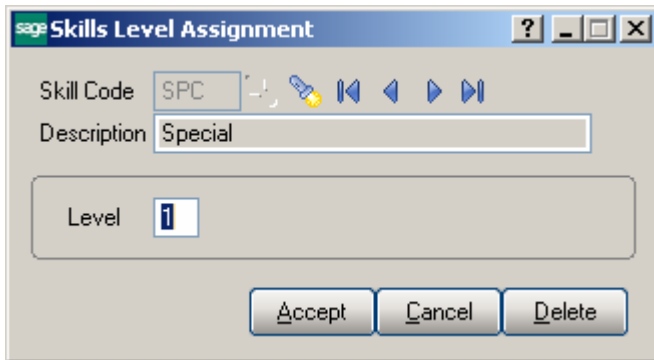
The setting of the **No Messages** box is stored for each Technician Code separately.

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

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

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

The following screen will appear.



The screenshot shows a dialog box titled "Sage Skills Level Assignment". It contains the following fields and controls:

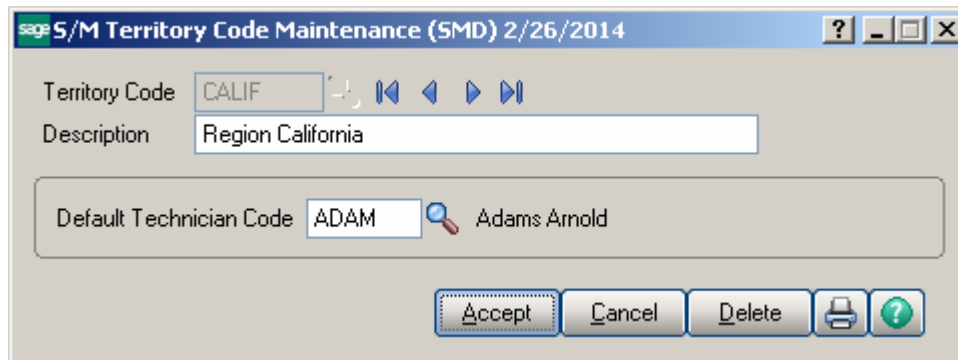
- Skill Code:** A text box containing "SPC" with a search icon and navigation arrows.
- Description:** A text box containing "Special".
- Level:** A text box containing "1" with an information icon.
- Buttons:** "Accept", "Cancel", and "Delete" buttons at the bottom.

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

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

Territory Code Maintenance

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



The screenshot shows a software window titled "Sage S/M Territory Code Maintenance (SMD) 2/26/2014". It contains the following fields and controls:

- Territory Code:** A text box containing "CALIF" with navigation arrows to its right.
- Description:** A text box containing "Region California".
- Default Technician Code:** A text box containing "ADAM" with a magnifying glass icon and the name "Adams Arnold" to its right.
- Buttons:** A row of buttons at the bottom: "Accept", "Cancel", "Delete", a printer icon, and a help icon (a green circle with a question mark).

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.

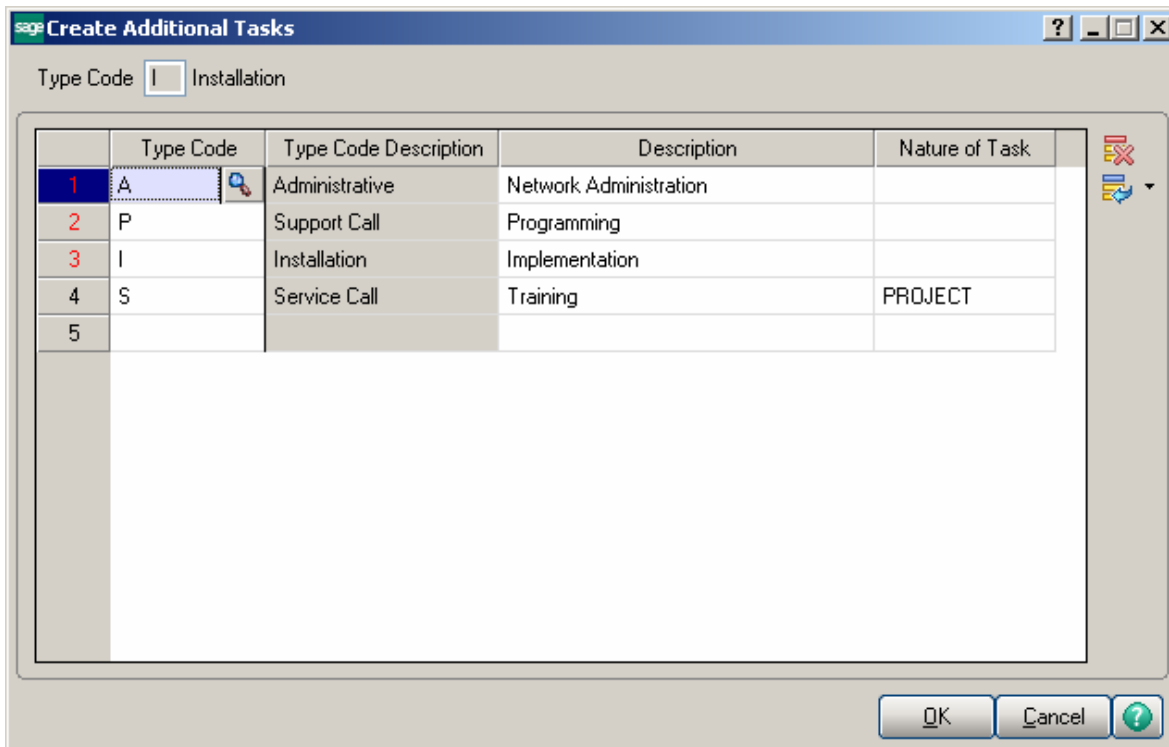
The screenshot shows the 'Task Type Maintenance (SMD) 4/27/2015' window. It features a 'Type Code' field with a dropdown arrow, a 'Description' field containing 'Installation', a 'Create Additional Tasks' checkbox which is checked, and an 'Additional Tasks...' button. Below this is a 'Sales Account' field with '111-00-0000' and a magnifying glass icon next to the text 'Other Receivables'. A list of files is shown with five rows: File 1, File 2, File 3, File 4, and File 5. File 1 contains 'D:\MAS\MAS510\SMP_forDemoData\MAS90\AvaTax-Install8.bmp' and File 2 contains 'D:\MAS\MAS510\SMP_forDemoData\MAS90\DOC\Installation Instructions for SMF'. Each file row has a small green icon to its right. At the bottom of the window are buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

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.

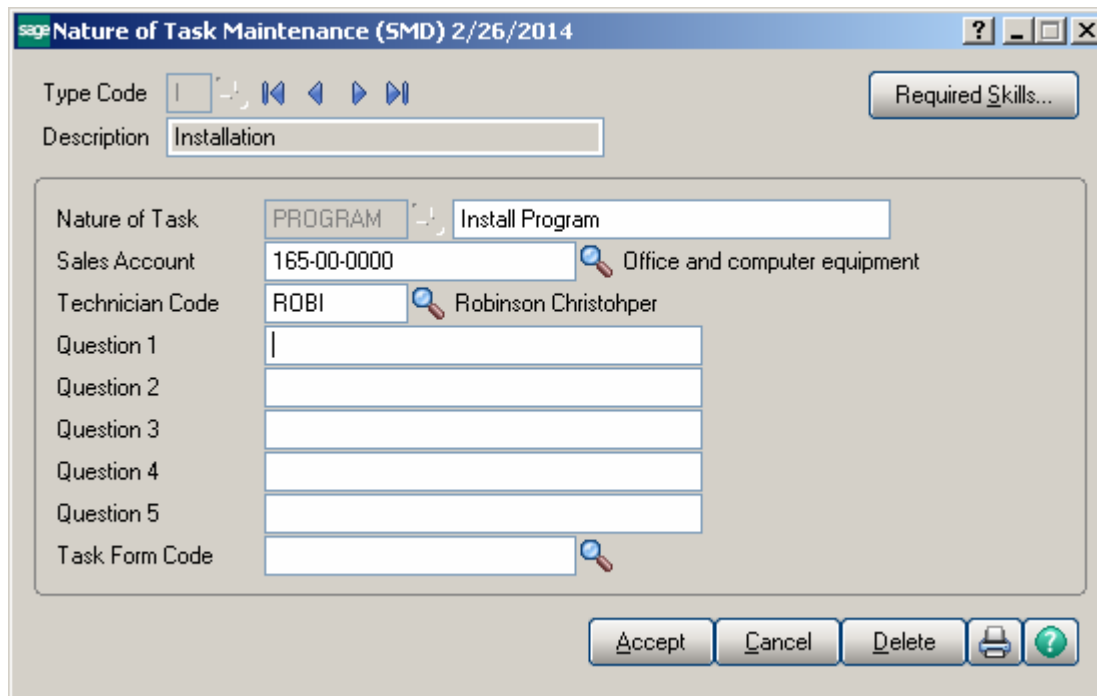
Here is the **Create Additional Tasks** screen with 3 tasks selected to be generated additionally for current Task.



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

Nature of Task Maintenance

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



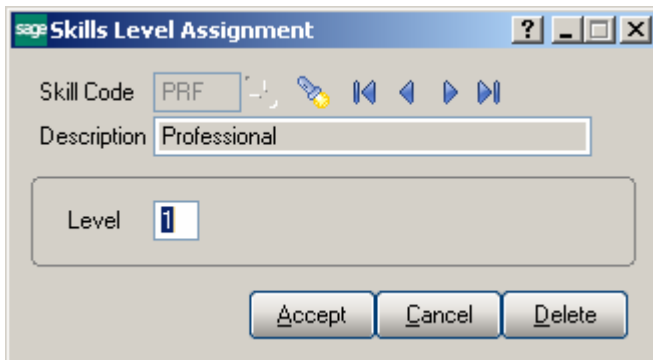
Enter **Task Type** or select it from the lookup for the Nature of the Task you wish to maintain.

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

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

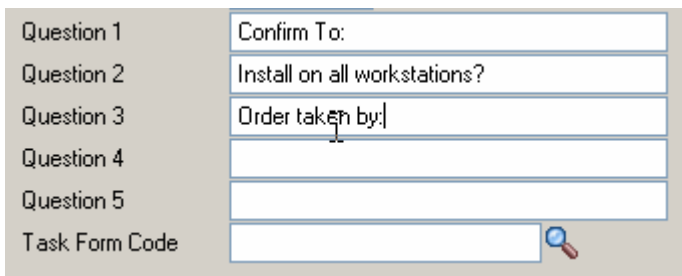
Select the **Technician Code** to be loaded by default when selecting the **Nature of Task**.

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



The screenshot shows a dialog box titled "Skills Level Assignment". It features a "Skill Code" field containing "PRF", a "Description" field containing "Professional", and a "Level" field containing "1". At the bottom, there are three buttons: "Accept", "Cancel", and "Delete".

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



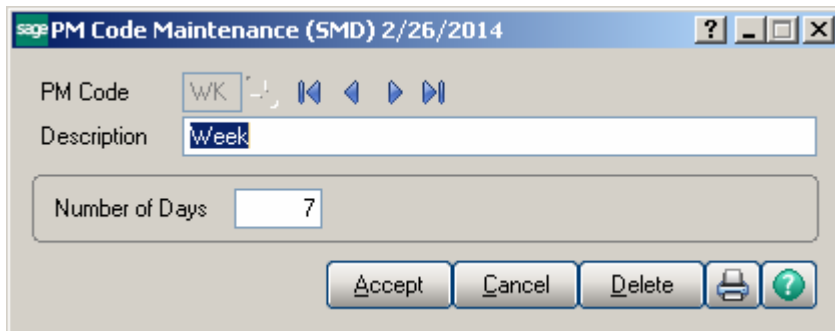
The screenshot shows a form with five questions and a task form code field. The questions are: Question 1: Confirm To:; Question 2: Install on all workstations?; Question 3: Order taken by:; Question 4: (empty); Question 5: (empty). The Task Form Code field is empty and has a magnifying glass icon.

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.



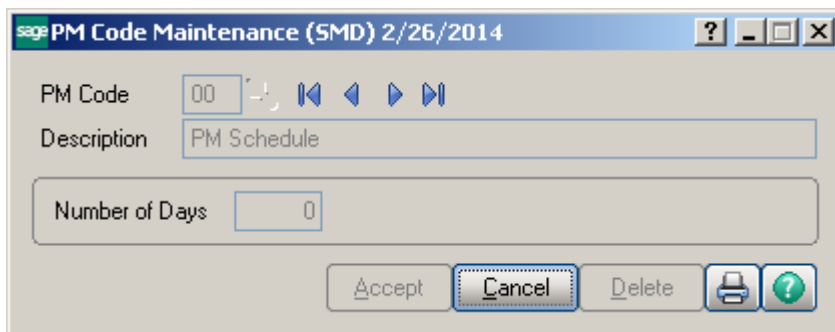
The screenshot shows a dialog box titled "sage PM Code Maintenance (SMD) 2/26/2014". It contains three input fields: "PM Code" with the value "WK", "Description" with the value "Week", and "Number of Days" with the value "7". Below the fields are five buttons: "Accept", "Cancel", "Delete", a printer icon, and a help icon.

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.



The screenshot shows the same dialog box as above, but with the "PM Code" field set to "00", the "Description" field set to "PM Schedule", and the "Number of Days" field set to "0". The "Cancel" button is highlighted with a dotted border.

Routing Maintenance

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

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

Step No.	Description	Req. Hours	Gen. Task	Task Type	Nature Of Task	Next Step No., Alt-X		Tech. Code
						Mfg	Labor/Skill Code	
1	Send welcome / PC intro letter	.00	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
2	Call to Schedule Site Survey	.25	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
3	Site Survey	5.00	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
4	Kick off Meeting	4.00	<input checked="" type="checkbox"/>	S	PROJECT	<input type="checkbox"/>		
5	Call to schedule training	3.00	<input checked="" type="checkbox"/>	I	PROGRAM	<input type="checkbox"/>		
6		.00	<input type="checkbox"/>			<input type="checkbox"/>		

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

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

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

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

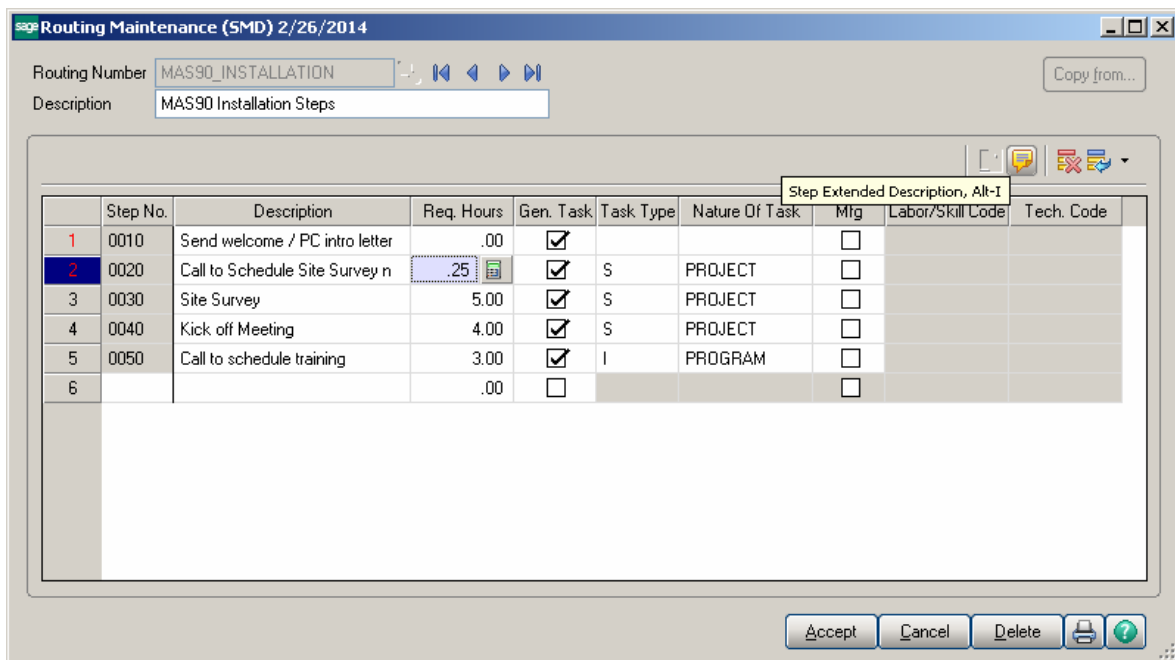
If you are entering the first step number for a new routing, clicking the **Next Number** icon will insert **Step Number 0000** automatically.

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

Task/Dispatch Status Maintenance

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

The screenshot shows the Sage Task/Dispatch Status Maintenance (SMD) window. The title bar indicates the date is 2/26/2014. The main area contains the following fields and options:

- Status Code: C
- Description: Closed
- Allow Cascade Replacement:
- Retain during Cascade Replacement:
- Use this Status in: Task & Dispatch
- Use color in Dispatch Board:
 - For Tasks: R: 227 G: 157 B: 214
 - For Dispatches: R: 117 G: 95 B: 118

At the bottom of the window, there are buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

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**.

The screenshot shows a dialog box titled "Task/Dispatch Status Maintenance (SMD) 2/26/2014". It contains the following elements:

- Status Code: L
- Description: Late / Conflict
- Allow Cascade Replacement:
- Retain during Cascade Replacement:
- Use this Status in: Task & Dispatch (dropdown menu is open showing Task, Dispatch, and Task & Dispatch)
- Use color in Dispatch:
- For Tasks: (Color: R: 255, G: 255, B: 128)
- For Dispatches: (Color: R: 255, G: 255, B: 128)
- Buttons: Accept, Cancel, Delete, Print, Help

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

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

Search: Status Code Begins with Find

Filters... Custom... Select Cancel [Icons]

Found 10 records

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

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

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





















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

Task/Dispatch Status Listing

Main Report

Task/Dispatch Status Listing

SM Demo Company (SMD)

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

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

Response Code Maintenance

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

Response Code: STD

Description: Standard Response 24 hr

Number of Hours: 24.00

Buttons: Accept, Cancel, Delete, Print, Help

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.

Coverage Code: HSRV

Description: Work hours for services

Workdays Only:

Monday	9:00AM	8:00PM
Tuesday	9:00AM	8:00PM
Wednesday	9:00AM	8:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	6:00PM
Saturday	12:00AM	12:00AM
Sunday	12:00AM	12:00AM

Buttons: Accept, Cancel, Delete, Print, Calendar, Help

Calendar. Alt T

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

Working Days Maintenance (SMD) 2/26/2014

Year 2014

Quick Row 5

	Day	Description	Work Day
1	1/1/2014	New year	<input type="checkbox"/>
2	1/2/2014	Holiday	<input type="checkbox"/>
3	1/3/2014	Working day	<input checked="" type="checkbox"/>
4	1/4/2014	Weekend	<input checked="" type="checkbox"/>
5	1/6/2014		<input checked="" type="checkbox"/>
6	1/7/2014		<input checked="" type="checkbox"/>
7			<input type="checkbox"/>

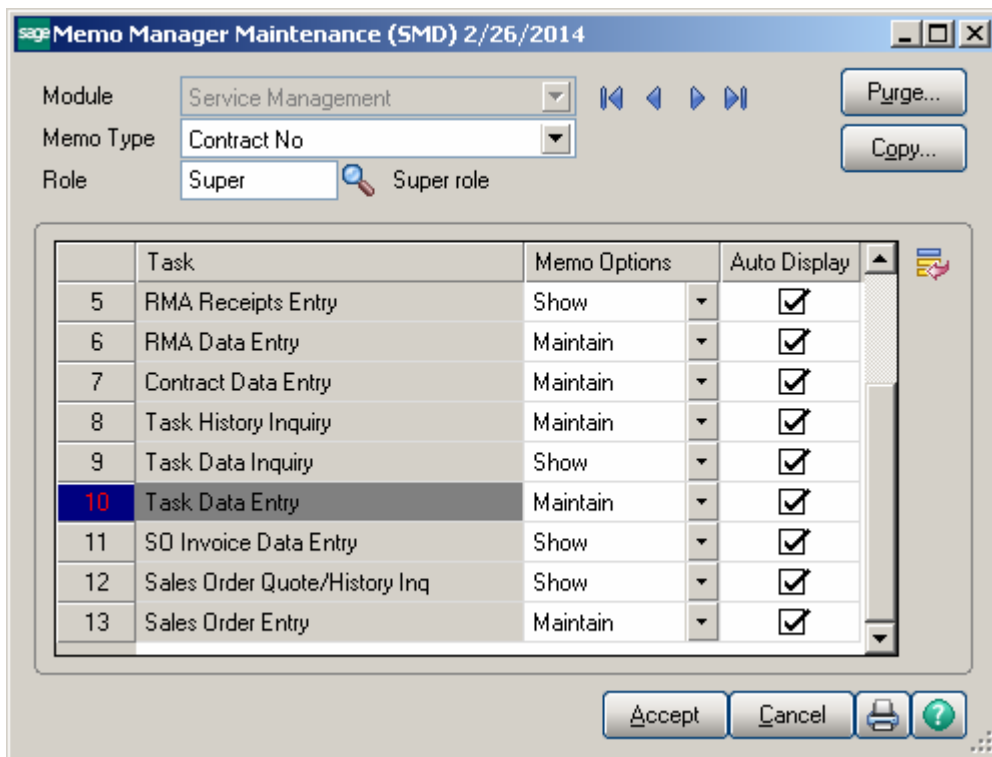
Workday Count 22 x 8 hours = 176

Accept Cancel Delete

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

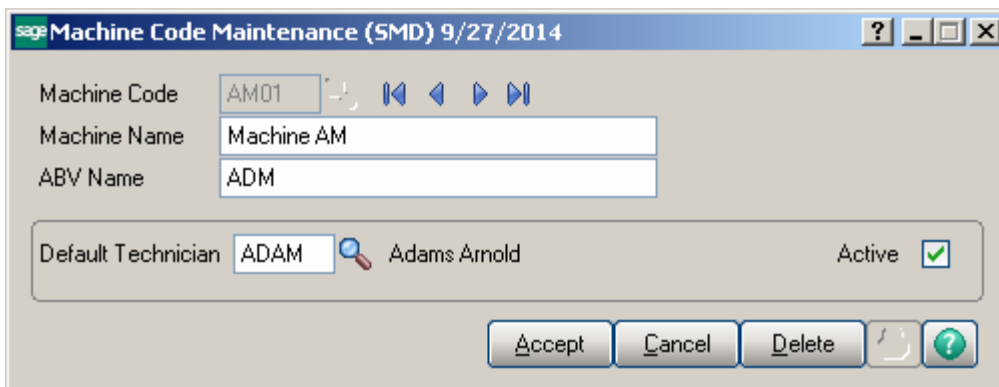
Memo Manager Maintenance

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

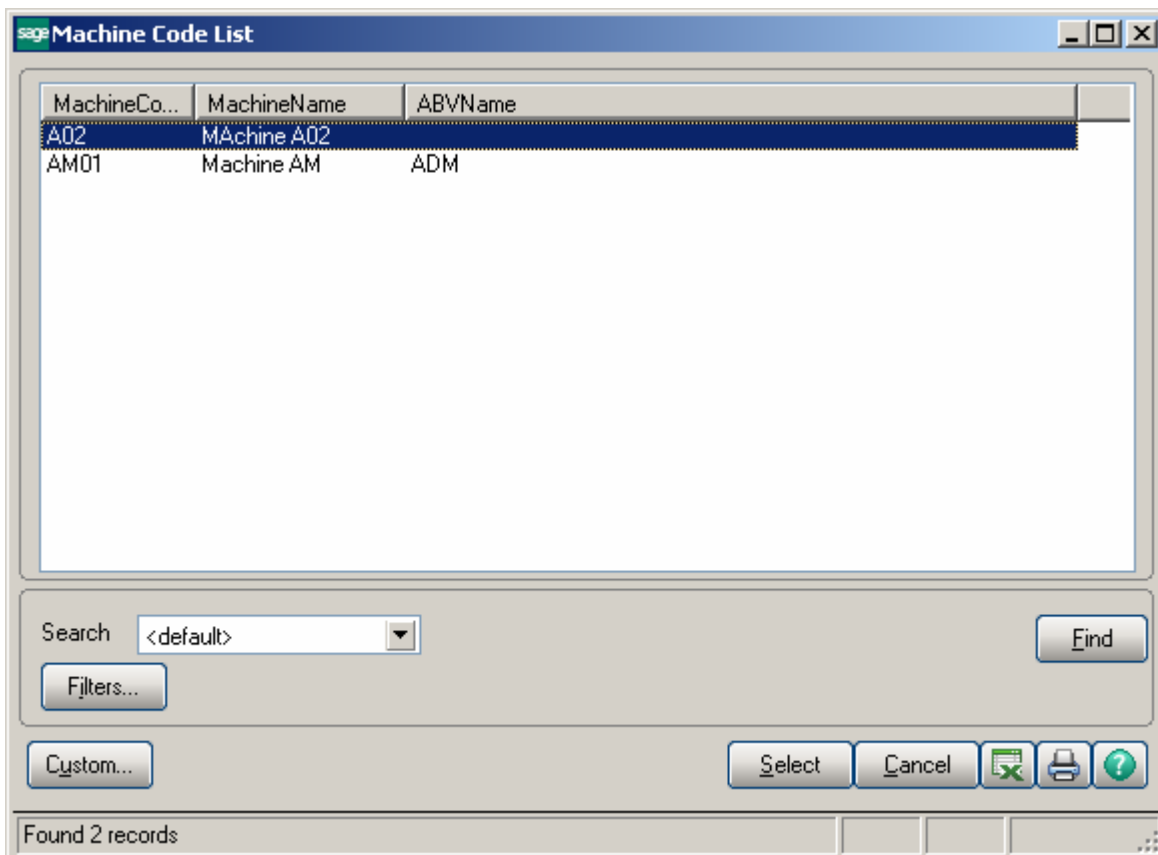


Machine Code Maintenance

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



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



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.

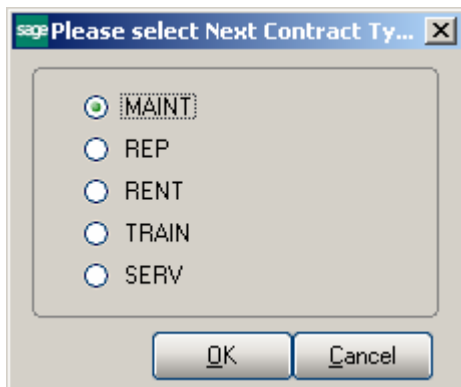
Enter a Contract number, or click the Lookup button to list all contract numbers. Click the **Next Contract Number** button to automatically increment the contract number for a new Contract.

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

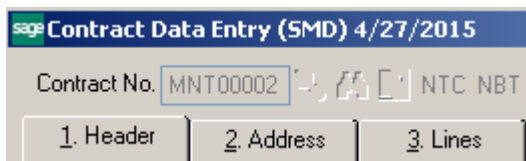
customer who purchases that item. A template contract number starts with “T”. (You can enter the number starting with “T” manually, to create Template Contract.)

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

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



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



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

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

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

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.

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.

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

- PM Code: Q (Quarterly)
- Number of Days: 90
- Last Task Gen. Date: (empty)
- TaskType: I (Installation)
- Nature of Task: PROGRAM (Install Program)
- Total Fixed Hours: 0
- Used Hours: 0:00
- Documents Path: a\MAS90\Documents\Contracts\000000026

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.

The screenshot shows the same form as above, but with the PM Code field set to 00. A blue box highlights the PM Code field, and a mouse cursor is pointing to the PM Schedule button next to it.

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.

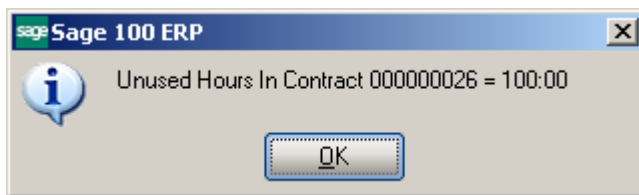
For an example, please refer to the [Auto Generate Task Based on PM Schedule](#).

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.

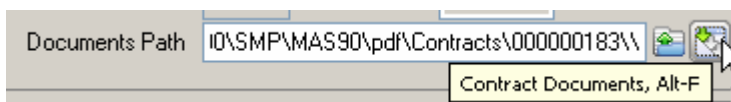
This screenshot shows a form with several fields: PM Code, Number of Days (0), Last Task Gen. Date, Task Type, and Nature of Task. At the bottom, there are two input fields: 'Total Fixed Hours' with the value '100' and 'Used Hours' with the value '0:00'. A blue box highlights these two fields, and a mouse cursor is pointing at the 'Used Hours' field.

This screenshot shows the same form as above, but the 'Used Hours' field now contains the value '110:00'. A blue box highlights the 'Total Fixed Hours' and 'Used Hours' fields.

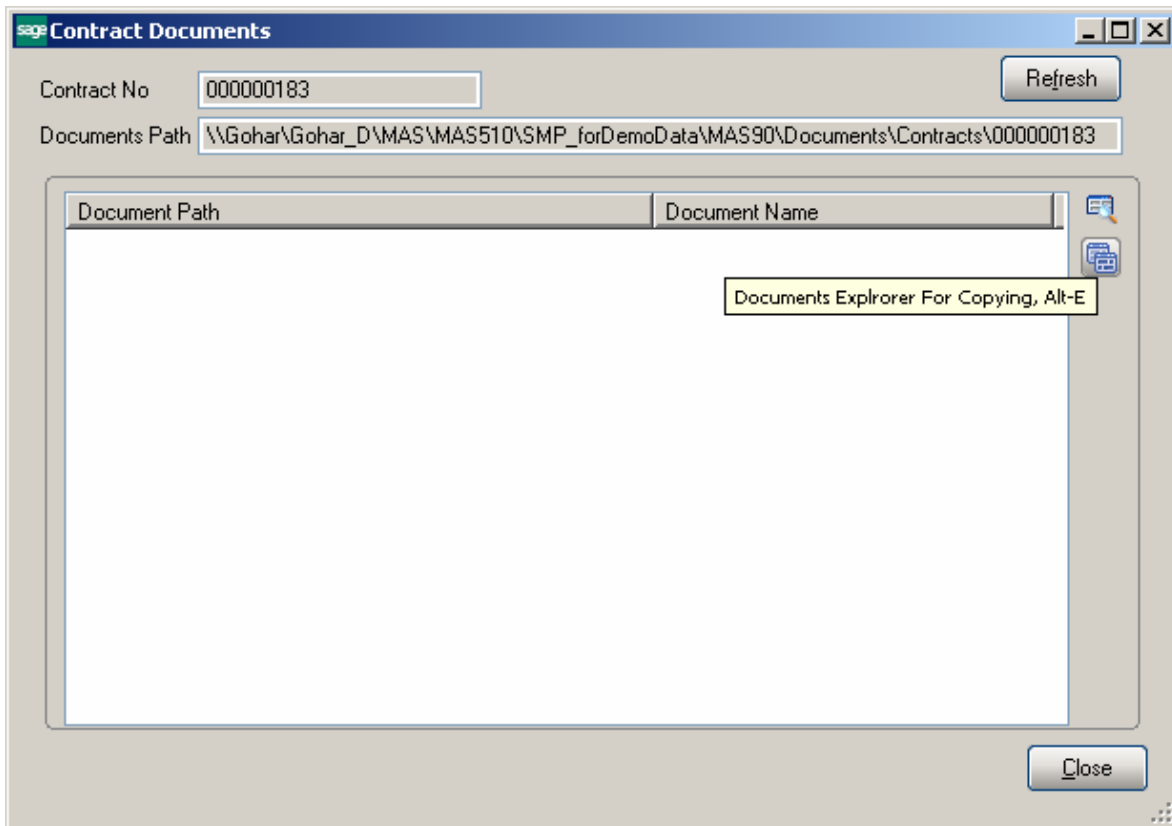
In the Task Data entry the user is prompted about the hours remaining unused for current Contract upon selecting the Task created for current Contract.



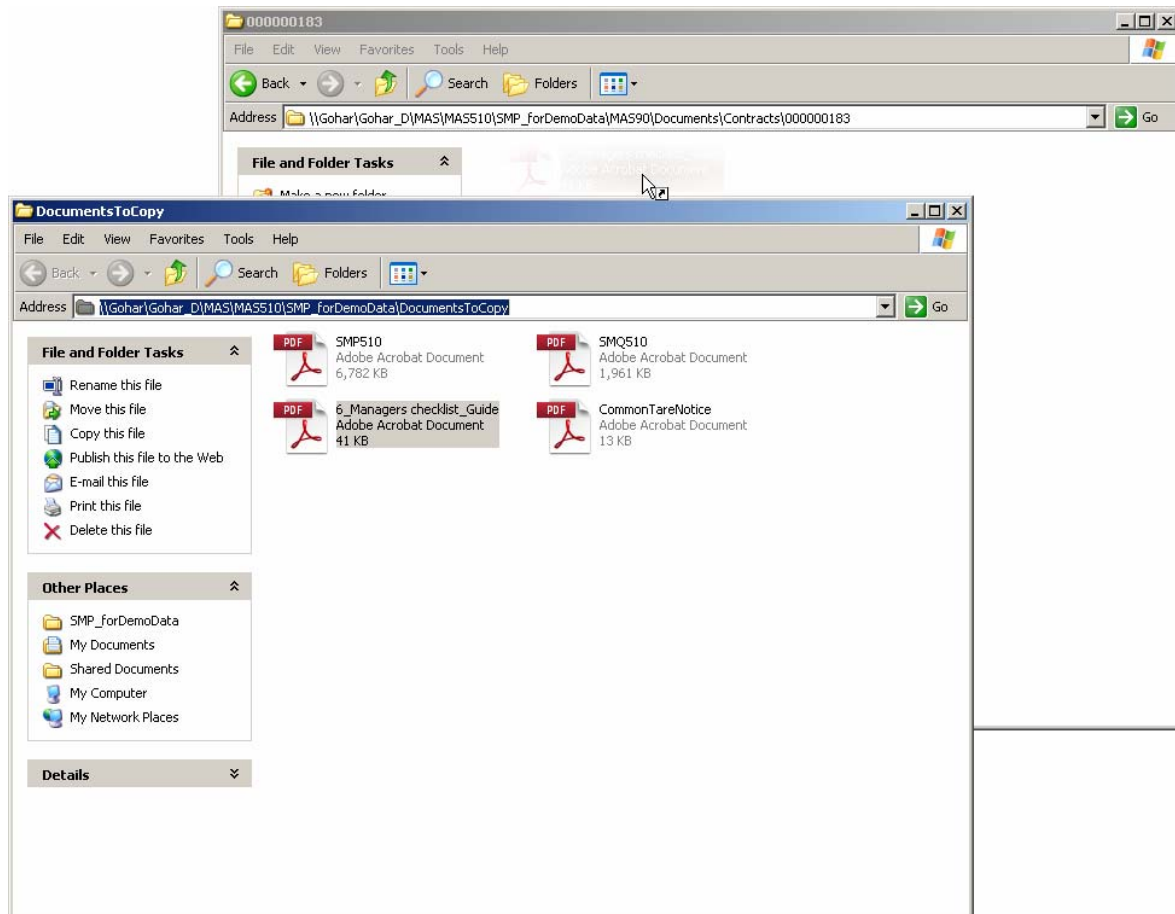
When new Contract is created the **Documents Path** is defaulted to the **Documents Path** set in the **Service Management Options** with the Contract # subfolder automatically created:




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

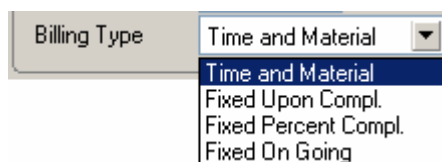


The **Documents Explorer For Copying** button added on the Contract Documents screen allows for launching the documents' paths in 2 different Windows explorer views. It enables easily copying a document from one path to another:



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

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



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

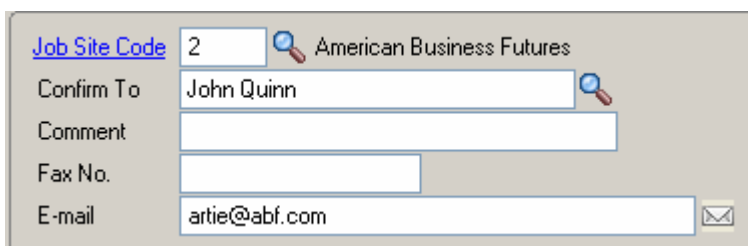
these checkboxes are left blank, then users have to specify all the items and all the labor charges covered by this contract in the appropriate line entry tabs.




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.



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

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

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

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

sage Contract Item Maintenance (SMD) 5/8/2014

Customer No. American Business Futures
 Contract Number

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

	Item Code	t/Serial Num	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input type="checkbox"/>	2.00	70.00	2/14/2014	2/14/2015	01-ANDERS
2	2480-8-50	JAN10	<input type="checkbox"/>	1.00	30.00	2/14/2014	2/10/2015	
3	D1000		<input type="checkbox"/>	1.00	800.00	2/14/2014	2/2/2015	
4			<input type="checkbox"/>	.00	.00			

Description
 Coverage Code
 Response Code
 Ship To
 Billing Freq.
 PM Code

Accept Cancel Delete

If you want to mark an item as default for the contract, check the **DI** box.
 If the Item is a **Lot /Serial Item**, enter the Lot/Serial Number in the respective field.
 You may have multiple lines of the same item with different settings.
 Fill in the Coverage Code, Response Code, Ship To, PM Code and the rest of fields available in the secondary grid, if required.
 The **Ship To, Task Type, Nature of Task, Coverage, and Response** fields are automatically loaded in the tasks generated by the **Auto Generate Tasks Selection** program for all of the preventive maintenance contract items.

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

sage Contract Item Component Maintenance

Contract Number: 000000026

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

Priority	Component Item Code	Quantity	Comment
1	1001-HON-H254	2.00	
2	2481-5-50	1.00	
3	8971	1.00	
4		.00	

Accept Cancel

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

sage Contract Item Labor/Skill Maintenance

Contract Number: 000000026

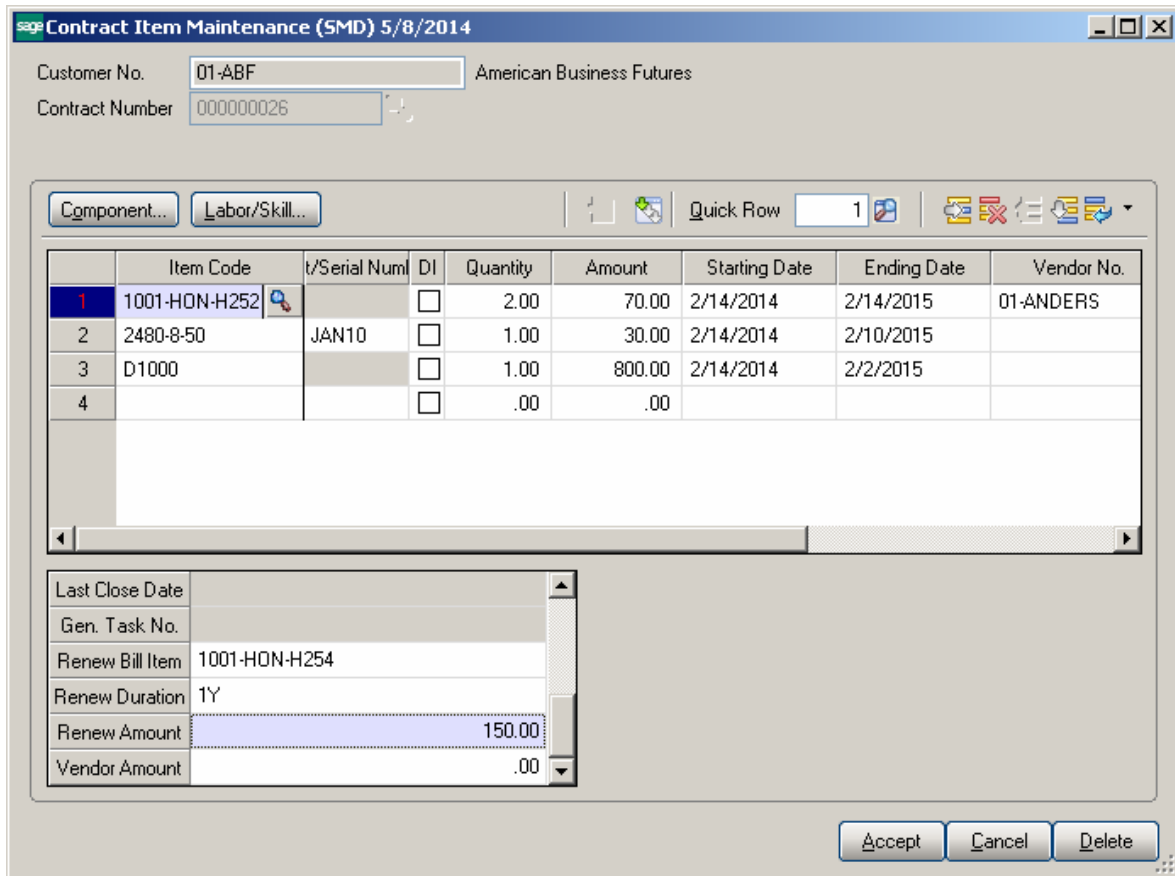
Item Code: 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

Priority	Labor/Skill Code	Hours Spent
1	INSTALL	2.00
2	/PRF	3.00
3		.00

Accept Cancel

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 **Contract Amount** option set to Items.

Bill Freq Code Control Date for Renewal

Select Field	Operand	Value
Customer Number	All	<input type="text"/>
Contract No	All	<input type="text"/>

	Contract No.	Customer No.	Freq Code	Amount From	Document	Total Amount	Include
1	000000026	01-ABF		Items	Standard O	900.00	<input checked="" type="checkbox"/>

Buttons: Clear, Proceed, Cancel, Generation

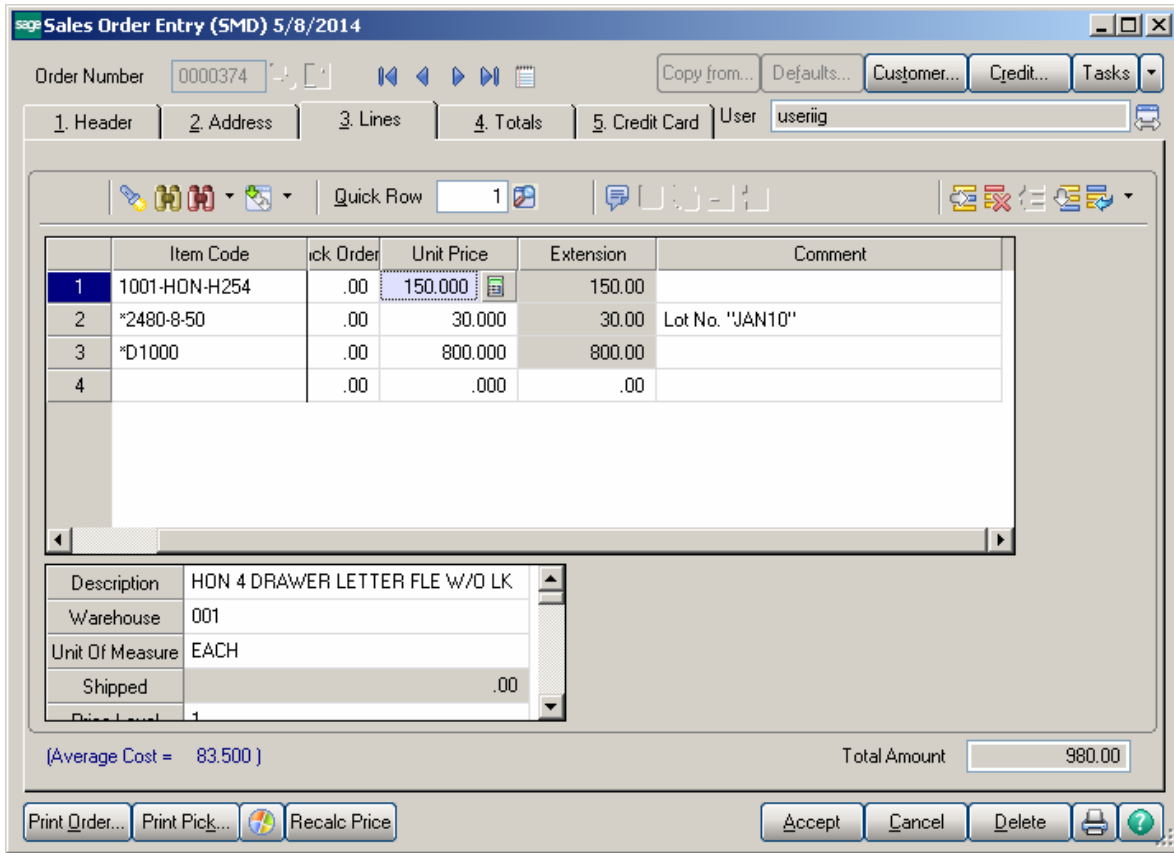
The **Control Date for Renewal** is intended for specifying the date for Contract renewal. This date should be greater than the Contract Item Ending Date in order to have the Contract Item selected for renewal. After making the necessary selections and pressing **Proceed** button the Contracts due to renewal are loaded in the grid. Select the **Include** checkbox and press the **Generation** button

Next Sales Order Number

Next Invoice Number

OK

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 Ending Date:

sage Contract Item Maintenance (SMD) 5/8/2014

Customer No. American Business Futures
 Contract Number

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

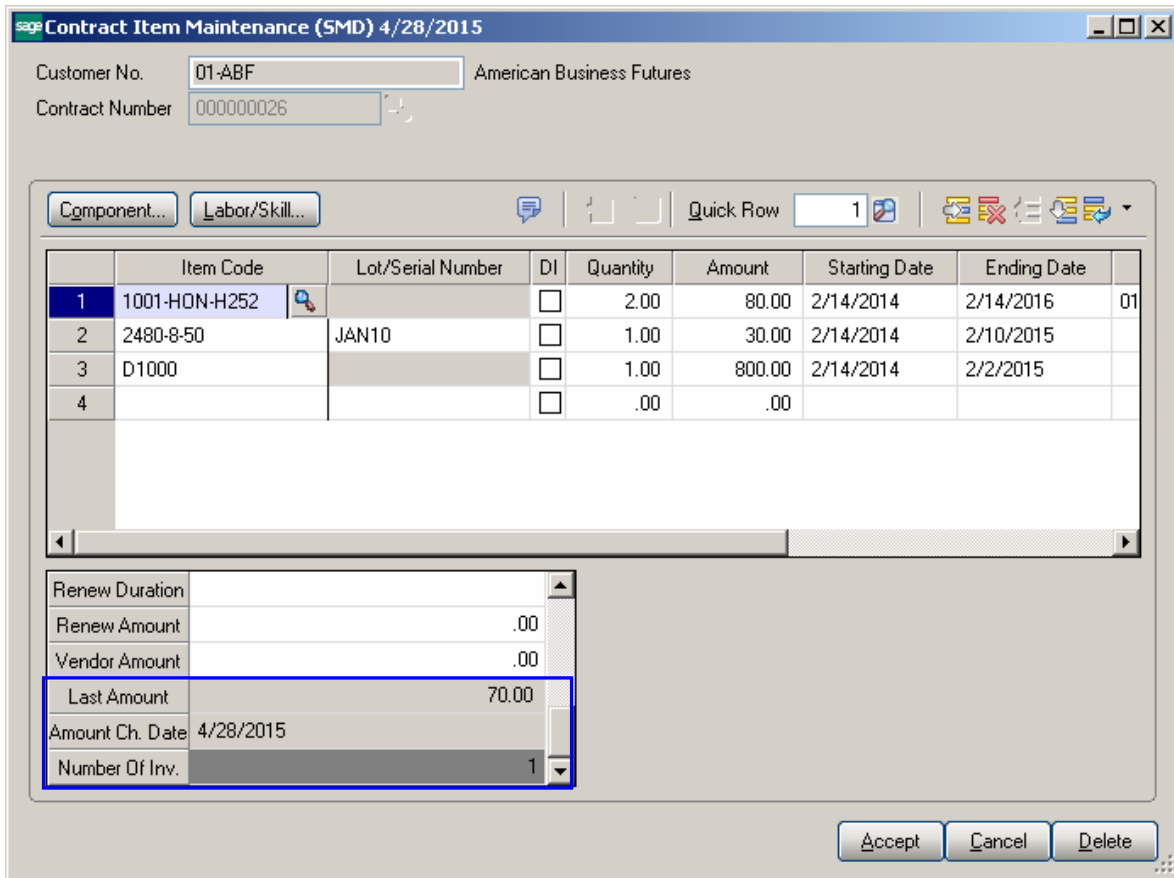
	Item Code	t/Serial Num	DI	Quantity	Amount	Starting Date	Ending Date	Vendor No.
1	1001-HON-H252		<input type="checkbox"/>	2.00	70.00	2/14/2014	2/14/2016	01-ANDERS
2	2480-8-50	JAN10	<input type="checkbox"/>	1.00	30.00	2/14/2014	2/10/2015	
3	D1000		<input type="checkbox"/>	1.00	800.00	2/14/2014	2/2/2015	
4			<input type="checkbox"/>	.00	.00			

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

Accept Cancel Delete

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

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



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

PM Schedule

The **Contract Item Maintenance -> PM Schedule** screen has been modified to add **Number of Visit** field and allow entering visit number for each day of week.

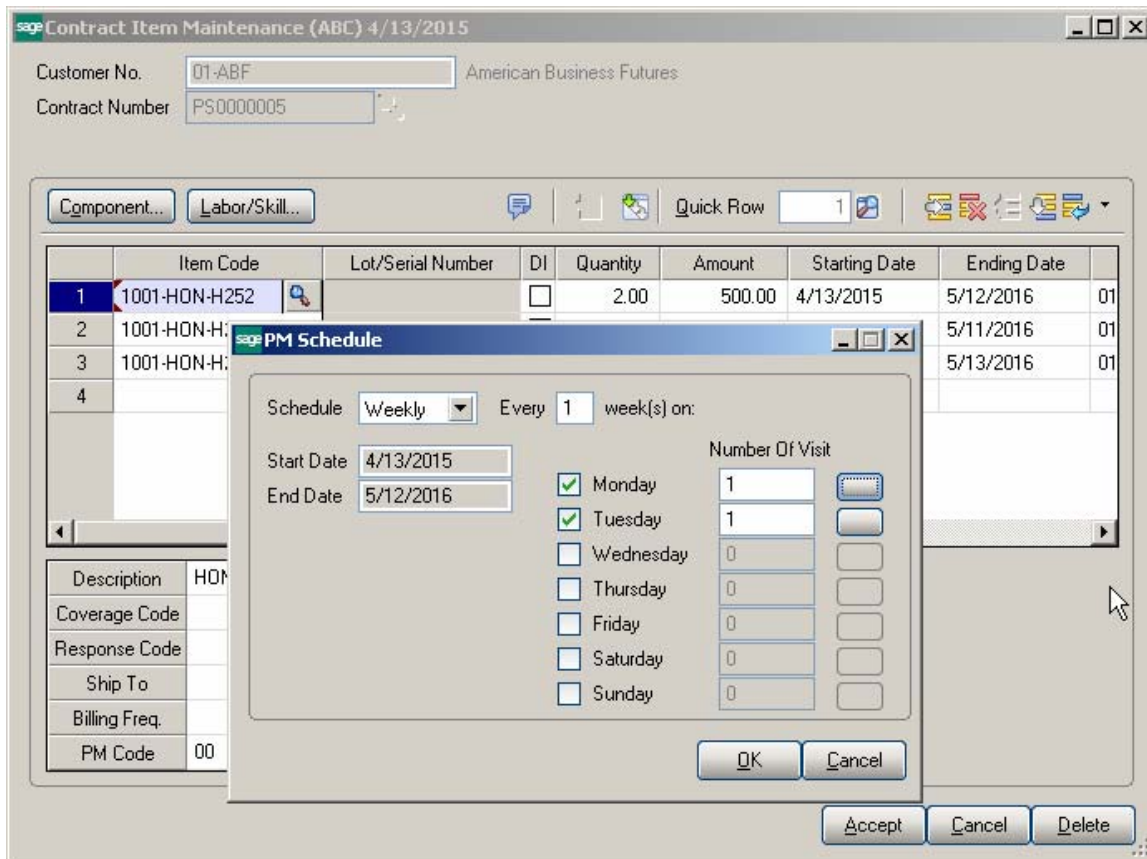
Customer No. 01-ABF American Business Futures
 Contract Number PS0000005

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

	Item Code	Lot/Serial Number	DT	Quantity	Amount	Starting Date	Ending Date	
1	1001-HON-H252		<input type="checkbox"/>	2.00	500.00	4/13/2015	5/12/2016	
2	1001-HON-H254		<input type="checkbox"/>	3.00	55.00	4/13/2015	5/11/2016	01
3	1001-HON-H252LK		<input type="checkbox"/>	3.00	50.00	4/13/2015	5/13/2016	01
4			<input type="checkbox"/>	.00	.00			

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

Accept Cancel Delete



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

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

	Customer No.	Contract No.	Number Of Visit	Ship-To	Address
1	01-ABF	PS0000005	1	2	Racine Warehouse 5411 Kendrick Place
2	01-AVNET	PS0000006	2	2	56 Technology Building two
3	01-HILLSB	MAINT0001	3		200 Union Street Upper Level

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

Address Tab

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

Contract No. 000000026 NTC Routine repairs Customer... Credit...

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

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

Bill To Address

Name: Orange Door & Window Co.
 Address: 1750 Edinger Avenue
 ZIP Code: 99541-0024
 City: Orange State: CA
 Country: USA United States of America

Ship To Address

Job Site: 2
 Name: American Business Futures
 Address: Racine Warehouse
 5411 Kendrick Place
 ZIP Code: 53120
 City: Racine State: WI
 Country: USA United States of America

Quick Print Generation Accept Cancel Delete

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

The **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:

Sage 100 ERP

Is this a new Ship-To Address?

Yes No

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

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

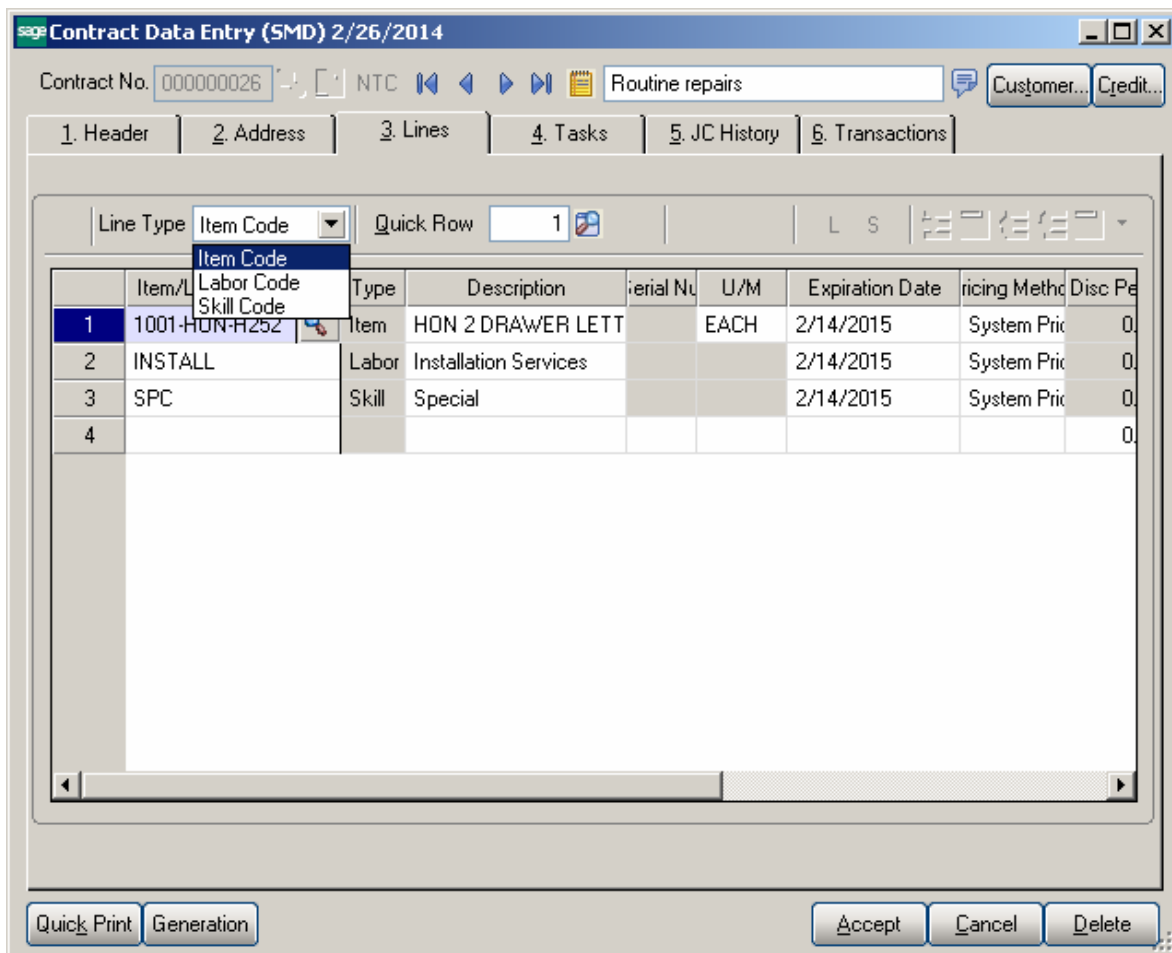
Lines Tab

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

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

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

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

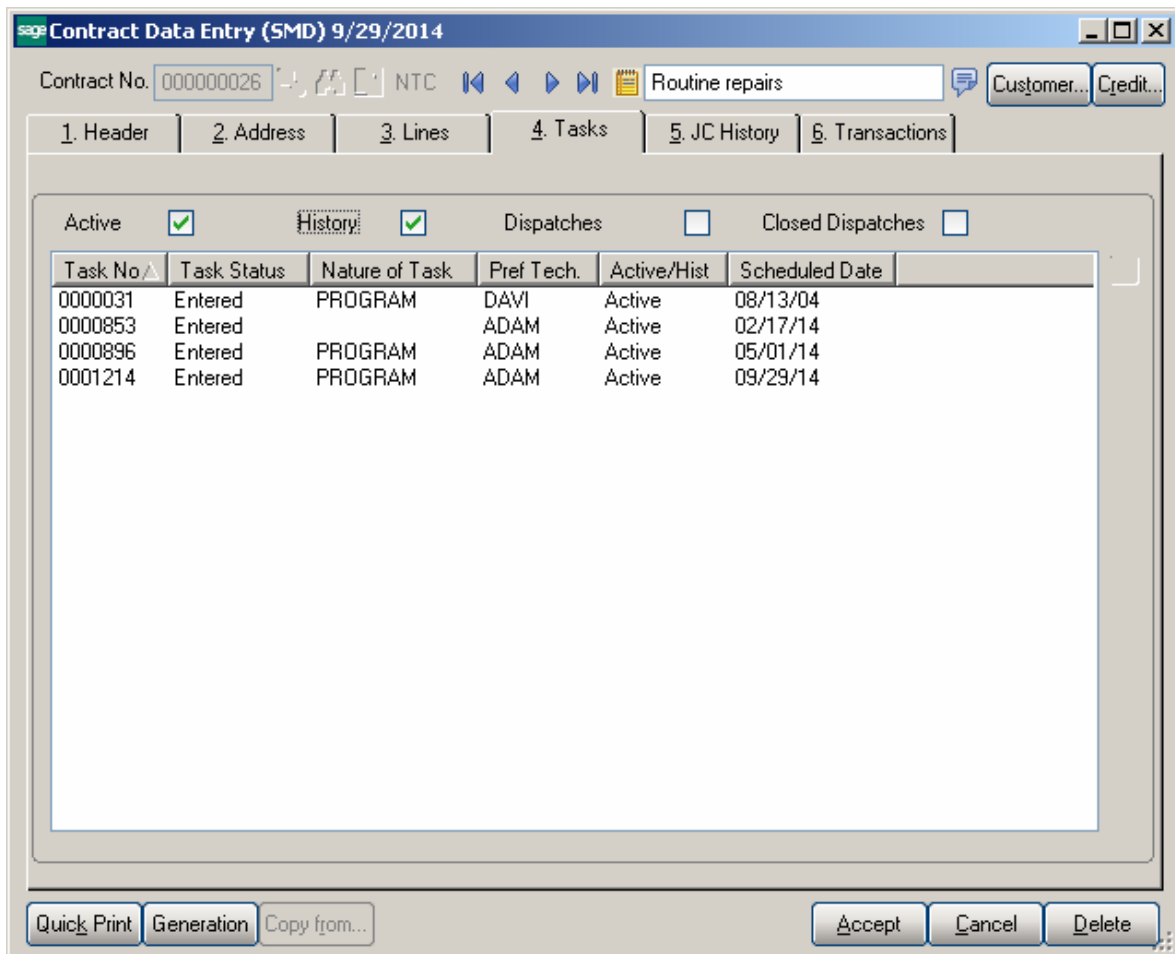


In either case, users have the option of specifying custom pricing information for a given item using the **Pricing Method** dropdown window as shown below.

- 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 and dispatches for current contract.



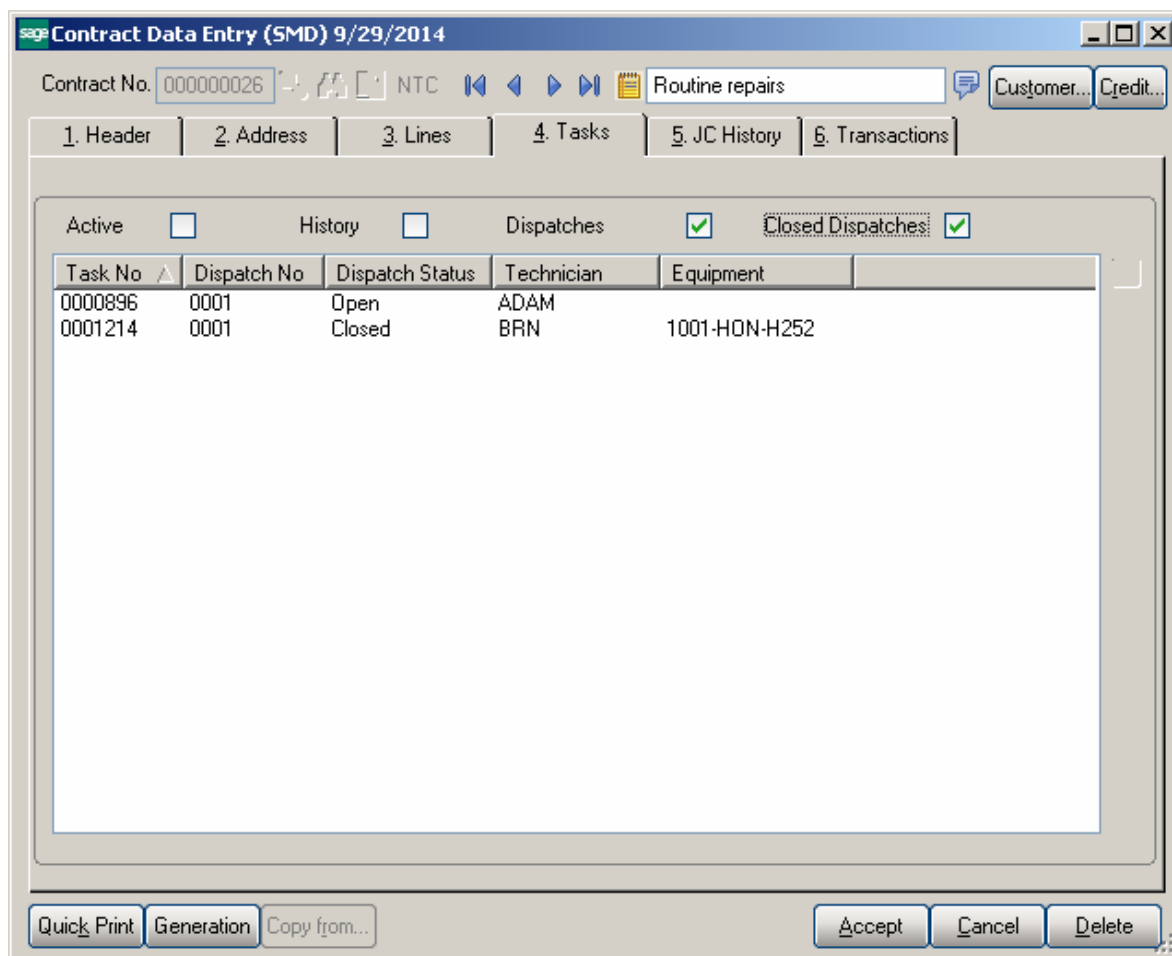
Check the **Active** box to list the active tasks.

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

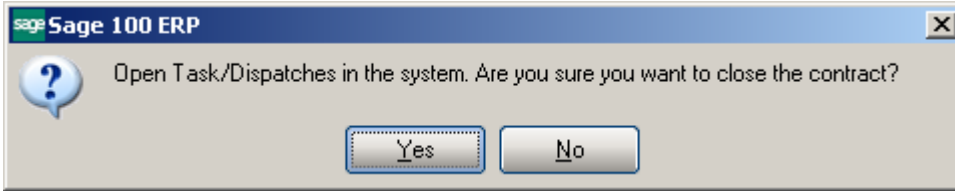
The **Scheduled Date** field displays the Task's Scheduled Date if no Dispatch is created for the Task. If the Task has dispatches the Scheduled Date shows the Starting Date of the last Dispatch.

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

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



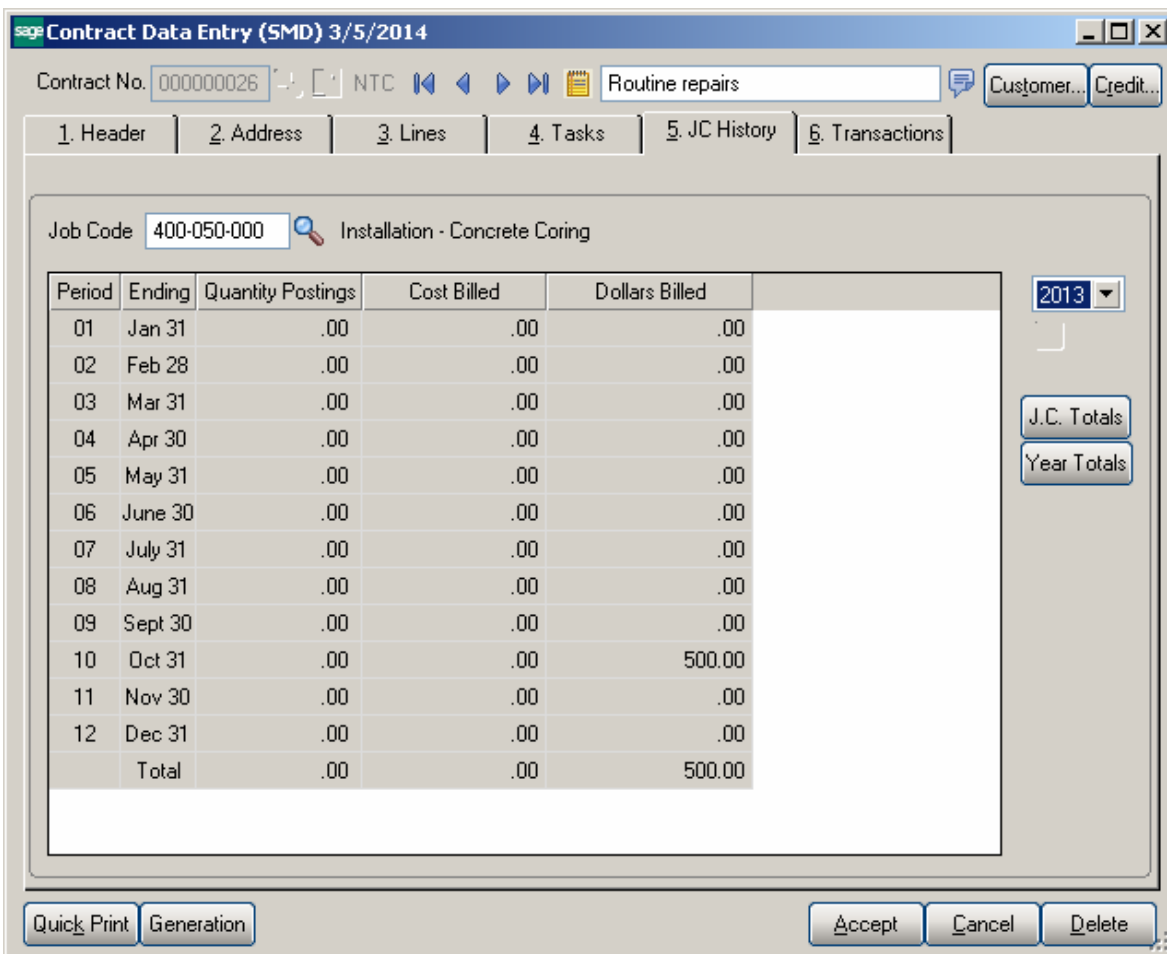
When the Status of the Contract having active Task/Dispatches is changed to Closed, a prompt appears about open Tasks/Dispatches allowing the user to confirm Contract closing.



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

JC History Tab

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



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.

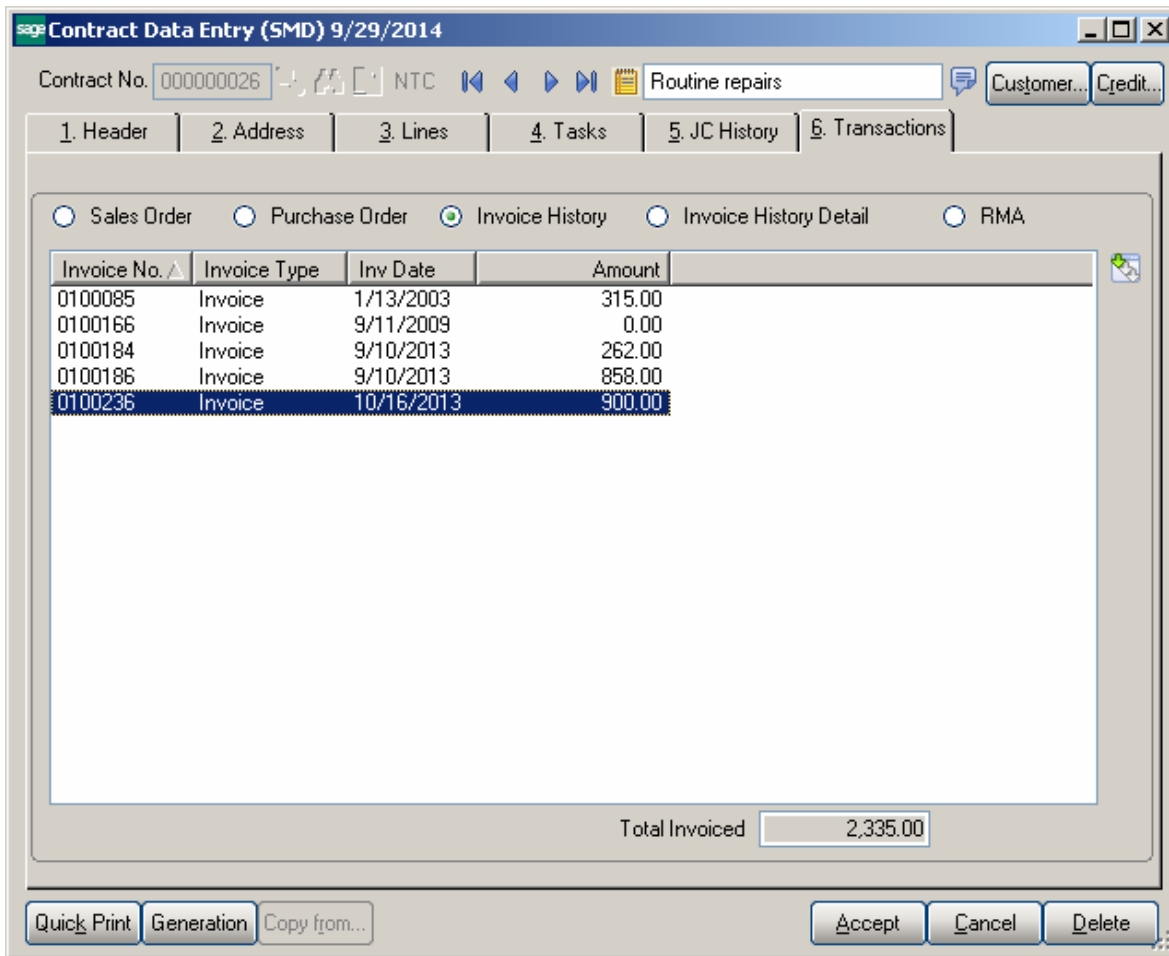
Use the **J.C. Totals** button to see total information for all Job Codes specific to the current contract.

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
- Invoice History detail
- RMA



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

sage A/R Invoice History Inquiry (SMD) 9/29/2014

Invoice No. Type Date

Source Order No.

1. Main | 2. Lines

Customer No. Orange Door & Window Co.

Ship To American Business Futures

Source Journal RMA No.

Contract No.

Terms Code Net 30 Days Ship Date Taxable

Ship Via Schedule Nontaxable

FOB Ship Zone Freight

Customer PO Weight Sales Tax

Salesperson Jim Kentley Apply To Discount

Confirm To IT User ID Invoice Total

Comment

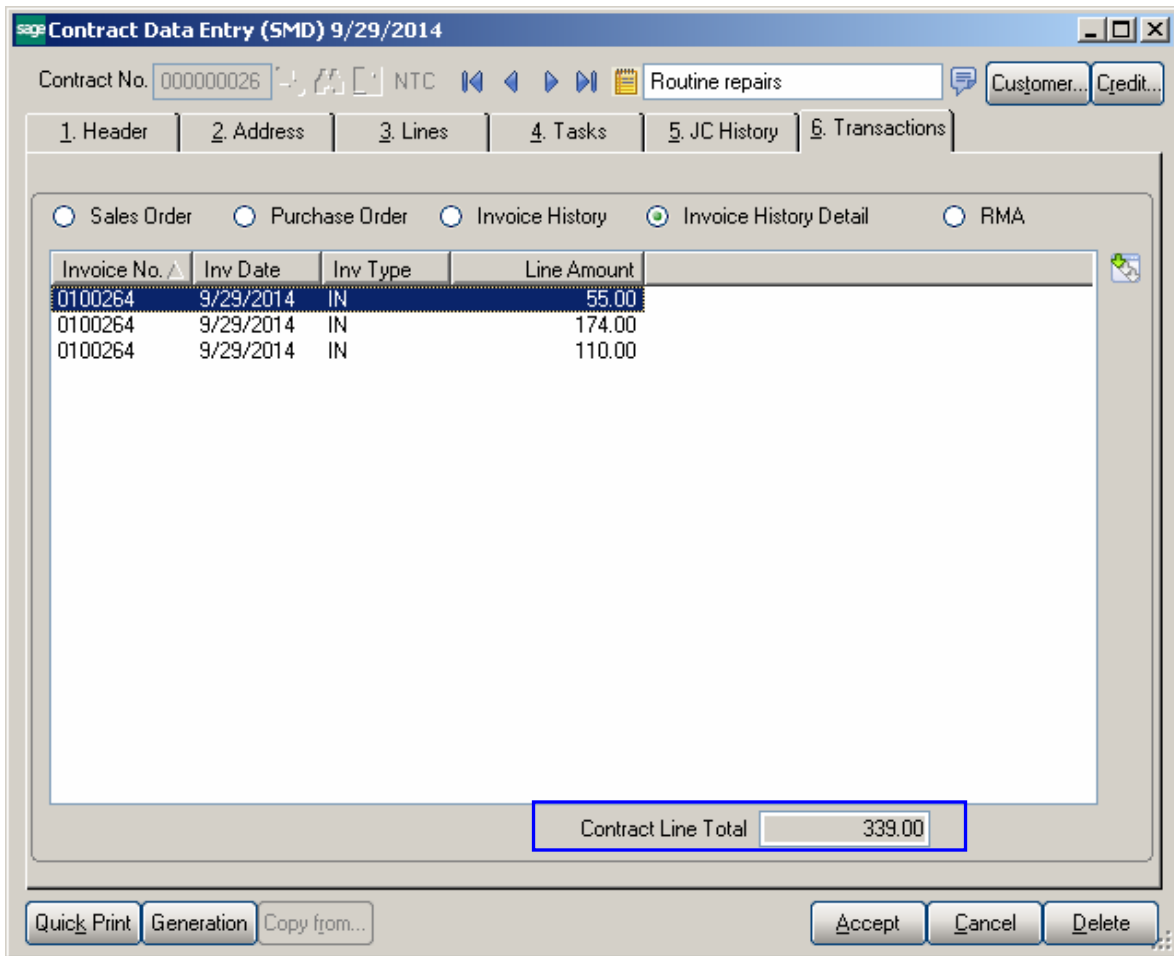
E-mail

Fax Batch Fax Deposit

Net Invoice

Balance

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



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

sage A/R Invoice History Inquiry (SMD) 9/29/2014

Invoice No. 0100264 Type INV Date 9/29/2014 Source S/O Order No.

1. Main 2. Lines

Item Code	Item Descri...	Shipped	Unit Price	Exten...	Unit C...	W..	Expiration	Contract No
1 /SALESTAX	Installation S...	1.00	55.0...	5...	...			000000026
2 1001-HON-H...	HON 2 DRA...	2.00	87.0...	1...	37...	30 ...	10/29/2014	000000026
3 BRNINSTALL	Installation S...	2.00	55.0...	1...	12...			000000026
4 /SALESTAX	Installation S...	1.00	55.0...	5...	...			000000080
5 1001-HON-H...	HON 4 DRA...	2.00	131...	2...	83...	60 ...	11/28/2014	000000080
6 ADAMMAKING	Making	3.00	55.0...	1...	20...			000000080

OK [Print] [Help]

Task Data Entry

Header Tab

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

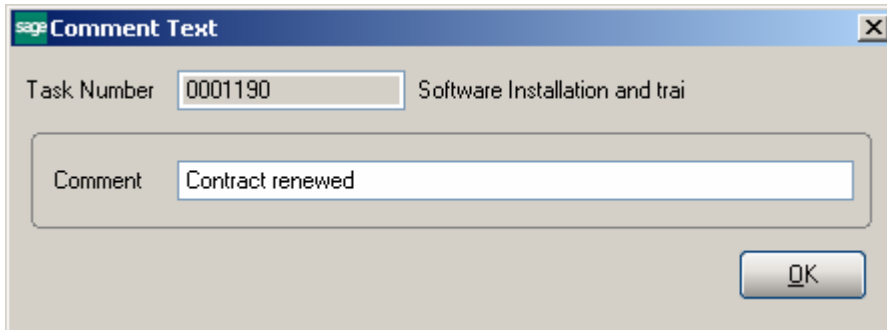
- Tasks (detailing installation steps) generated from the Sales Order Header.
- Tasks generated for special items from the Sales Order Lines.
- Tasks generated for Preventive Maintenance by the Auto Generate Task Selection program.

Enter a Task number, or click the Lookup button to list all active task numbers. Click the Next Number button to automatically increment the task number for a new task
Click the **Recall From History** button to view History tasks and recall the one you need.

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

Click the **Extended Task Description** button to enter more detailed description.

Press the Comment button to open the Comment Text screen with Contract Comments loaded by default. The Comments can be edited for a Task.



The screenshot shows a dialog box titled "SAP Comment Text". It contains a "Task Number" field with the value "0001190" and a label "Software Installation and trai". Below this is a "Comment" field with the text "Contract renewed". An "OK" button is located at the bottom right of the dialog box.

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

SAGE Task Data Entry (SMD) 9/29/2014

Task No. 0001190 Software Installation and trai Defaults...

1. Header 2. Address 3. Dispatches User Useriig

Task Date 8/7/2014 Task Time 04:46 PM Task Type I Installation

Customer No. 01-ABF American Business Futures Credit Card...

Task Status E Entered Salesperson 0100 Jim Kentley
 Contract No. 000000176 Dflt Pymt Type CHECK
 Job Site Code 2 American Business Futures
 Job Site Contact John Quinn Cust PO 012333
 Nature of Task Preferred Tech. ADAM Adams Arnold
 Preferred Mach. Item Number GB-MD789 MODEM 300
 Lot/Serial No. 300-1281 Territory CALIF Region California
 Tax Schedule CA California Separate Invoice
 Default Misc Item SALESTAX Installation Services Equipment...

Response STD Standard Response 24 hr Scheduled Date 8/7/2014 Time 04:46 PM
 Coverage HSRV Work hours for services Due Date 8/12/2014 Time 11:46 AM
 Quote Amount 1,200.00 Quote Hours .00 Disp

Documents Path \\Gohar\Gohar_D\MAS\MAS510\SMP\MAS90\pdf\Tasks\0001190

Quick Print RMA Copy from... Quick Email Accept Cancel Delete

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.

Customer No. 01-ABF American Business Futures Recalc Aging

Salesperson 0100 Jim Kentley Customer Credit Limit Is Exceeded

Credit Limit	A/R Balance	Open Order	Over By
1,200.00	24,201.95	14,200.17	37,202.12

Current	30 Days	60 Days	90 Days	120 Days
16,936.60	.00	.00	.00	7,265.35

Avg Days Pay/Overdue	4 / 0	Date Last Statement	4/30/2003
Date Established	1/1/2002	Highest Balance	850.00
Last Activity Date	2/26/2014		
Last Payment Date	5/31/2003		
Last Payment Amount	864.25	Date Last Finance Charge	4/30/2003
Date of Last Aging	5/10/2007	Unpaid Finance Charge	43.89

OK ?

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.

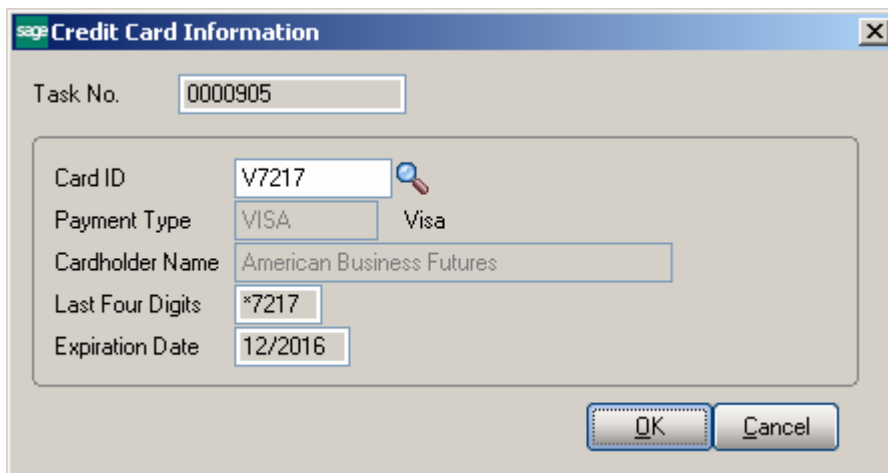
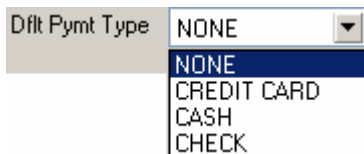
If the **Ship-to Address** has the **Calculate taxes on Labor** option (shown if corresponding option is set in the **Service Management Options**) selected, the **Tax Class** will be set for each Labor line of Dispatches and carried over to the generated document when closing a Dispatch.

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.

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** is defaulted from the Customer and can be changed on the Task. 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.



When Dispatch is created for the Task the Payment type specified for the task is defaulted to the created dispatch. Refer to **CC Payment from Dispatch Data Entry** for details.

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.

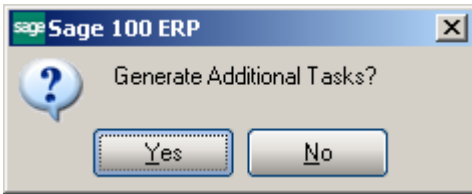
The screenshot displays the Sage Task Data Entry (SMD) interface for task 0001190. The window title is 'sage Task Data Entry (SMD) 10/2/2014'. The interface is organized into several sections:

- Task Information:** Task No. 0001190, Software Installation and trai, User Useriig, Task Date 8/7/2014, Task Time 04:46 PM, Task Type Installation.
- Customer Information:** Customer No. 01-ABF, American Business Futures, Credit Card... button.
- Task Details:** Task Status E Entered, Salesperson 0100 Jim Kentley, Contract No. 000000176, Job Site Code 2, Job Site Contact John Quinn, Nature of Task, Preferred Tech ADAM Adams Arnold, Preferred Mach., Item Number GB-MD789, Lot/Serial No. 300-1281, Territory CALIF, Region California, Tax Schedule CA California, Default Misc Item SALESTAX Installation Services, Separate Invoice checked.
- Response and Coverage:** Response STD Standard Response 24 hr, Coverage HSRV Work hours for services, Scheduled Date 8/7/2014, Time 04:46 PM, Due Date 8/12/2014, Time 11:46 AM, Quote Amount 1,200.00, Quote Hours .00, Disp button.
- Documents Path:** \\Gohar\Gohar_D\MAS\MAS510\SMP\MAS90\pdf\Tasks\0001190
- Buttons:** Quick Print, RMA, Copy from..., Quick Email, Accept, Cancel, Delete.

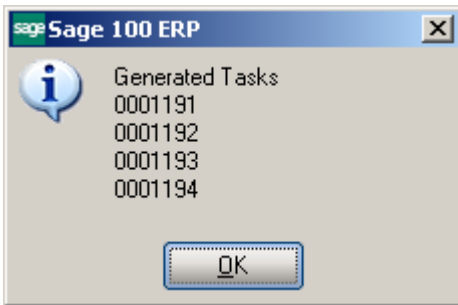
If the task is of a type, for which the **Create Additional Task** box is checked in the **Task Type Maintenance**, the Create Additional Tasks button become enabled allowing the user to automatically generate additional tasks.

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.

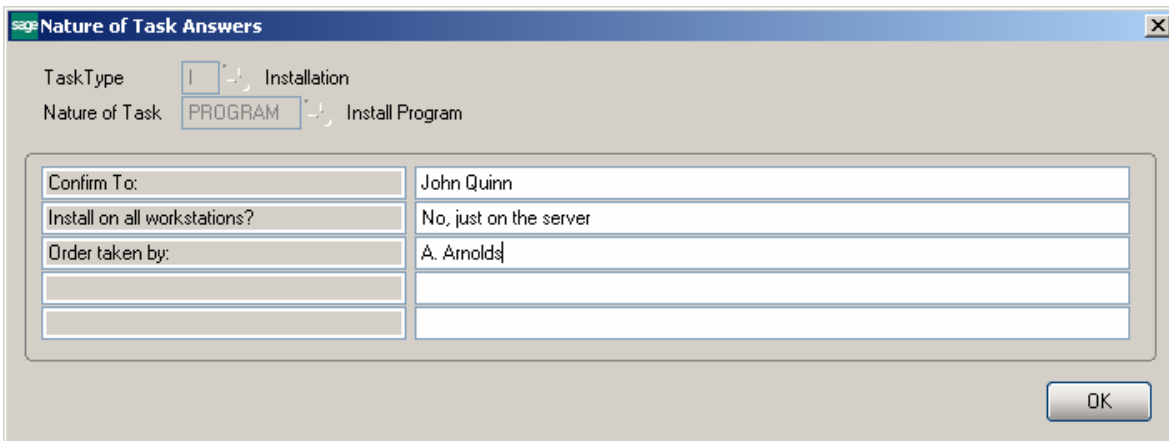
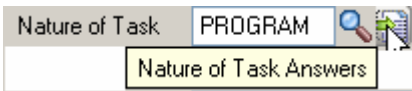


Upon pressing Yes a message is popup showing the numbers of the generated Tasks:



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

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



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 not load the Preferred Technician to the new created Dispatch.

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.

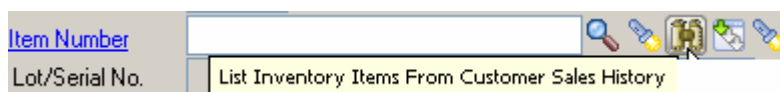
If the item reported by the customer has a **Lot/Serial Number**, you may enter it in the corresponding field.

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

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 **Additional** tab of the **Item Maintenance**.

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



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

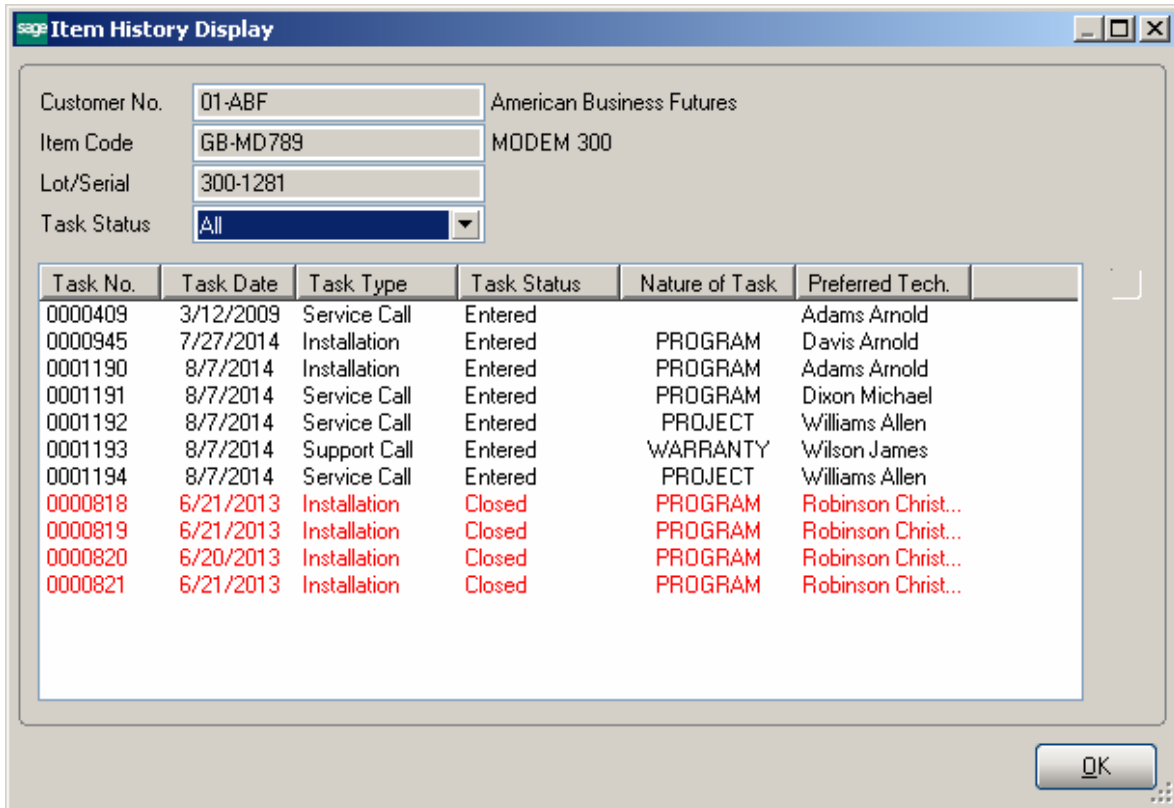
Item Code	Descr...	Customer...	Invoice No	Lot Se...	Invoice Date	Sold Date	War. Exp. Date
1001-HON-H252	HON 2...	01-ABF	0100185		9/10/2013	9/10/2013	10/10/2013
1001-HON-H252	HON 2...	01-ABF	0100248		2/12/2014	2/12/2014	3/14/2014
1001-HON-H252	HON 2...	01-ABF	0100250		3/24/2014	3/24/2014	4/23/2014
1001-HON-H252	HON 2...	01-ABF	0100254		4/2/2014	4/2/2014	5/2/2014
1001-HON-H252	HON 2...	01-ABF	0100265		4/28/2015	4/28/2015	5/28/2015
1001-HON-H254	HON 4...	01-ABF	0100184		9/10/2013	9/10/2013	11/9/2013
1001-HON-H254	HON 4...	01-ABF	0100211		9/10/2013	9/10/2013	11/9/2013
1001-HON-H254	HON 4...	01-ABF	0100225		9/10/2013	9/10/2013	11/9/2013
2480-8-50	DESK ...	01-ABF	0100064	JAN10	2/27/2002	2/27/2002	
2480-8-50	DESK ...	01-ABF	0100087	11	1/13/2003	1/13/2003	
2480-8-50	DESK ...	01-ABF	0100110	JAN10	11/20/2008	11/20/2008	1/19/2009
2480-8-50	DESK ...	01-ABF	0100119	JAN10	11/20/2008	11/20/2008	1/19/2009
2480-8-50	DESK ...	01-ABF	0100265	JAN10	4/28/2015	4/28/2015	6/27/2015
6655	PRINT...	01-ABF	0100132		3/12/2009	3/12/2009	
D1400	Door In...	01-ABF	0100129		2/25/2009	2/25/2009	

Search: Item Code Begins with [] Find

Filters... Custom... Select Cancel [X] [P] [?] [] [] [] []

Found 27 records

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.

Item Code	ContractNo	Customer No	Lot/Serial No.	Starting D.
1001-HON-H252	000000026	01-ABF		2/1/2014
1001-HON-H252	000000031	01-ABF		
1001-HON-H252	000000046	01-ABF		11/20/200
1001-HON-H252	000000082	01-ABF		1/30/2009
1001-HON-H252	000000128	01-ABF		3/16/2009
1001-HON-H252	000000129	01-ABF		5/28/2009
1001-HON-H252	000000131	01-ABF		7/28/2009
1001-HON-H252	000000136	01-ABF		9/23/2009
1001-HON-H252	000000137	01-ABF		9/23/2009
1001-HON-H252	000000172	01-ABF		2/14/2014
1001-HON-H252	000000173	01-ABF		1/14/2014
1001-HON-H252	000000174	01-ABF		2/14/2014
1001-HON-H252	000000185	01-ABF		4/3/2014
1001-HON-H252	000000191	01-ABF		10/18/202
1001-HON-H252	01ABF	01-ABF		8/5/2009

Search: Item Code Begins with Find

Filters... Custom... Select Cancel

Found 89 records

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

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

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

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

	Equipment Code	Serial Number	Contract No	Include
1				<input type="checkbox"/>

The following information can be entered here:

Equipment No (like the Item Code with lookup)

Serial Number (text field)

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

Include – is checked by default. Is intended for creating dispatch.

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

Item Code	ContractNo	Customer No	Lot/Serial No.
1001-HON-H252	000000136	01-ABF	
1001-HON-H252	000000137	01-ABF	
1001-HON-H252	000000172	01-ABF	
1001-HON-H252	000000173	01-ABF	
1001-HON-H252	000000174	01-ABF	
1001-HON-H252	000000185	01-ABF	
1001-HON-H252	000000191	01-ABF	
1001-HON-H252	01ABF	01-ABF	
1001-HON-H252LK	000000024	01-ABF	
1001-HON-H252LK	000000025	01-ABF	
1001-HON-H252LK	000000172	01-ABF	
1001-HON-H252LK	000000175	01-ABF	
1001-HON-H252LK	000000176	01-ABF	
1001-HON-H252LK	000000180	01-ABF	
1001-HON-H254	000000025	01-ABF	

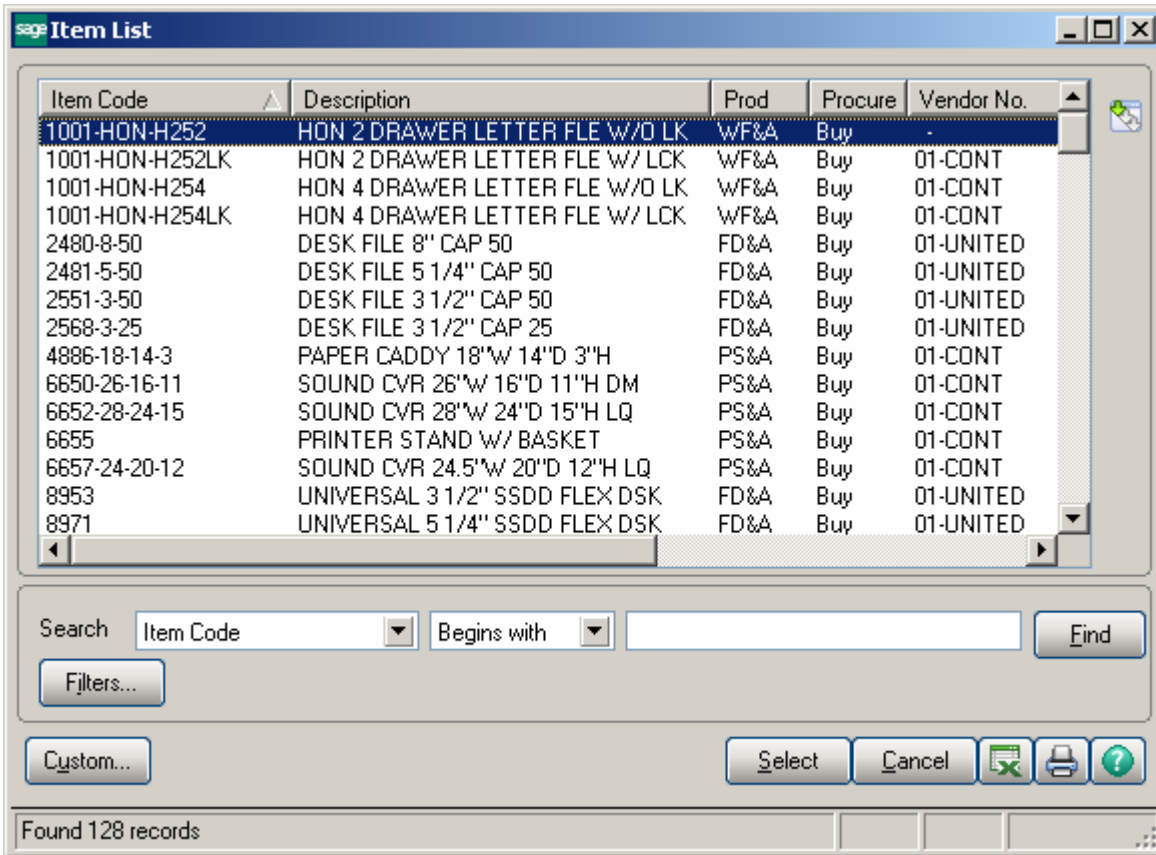
Search: Item Code [v] Begins with [v] [] Find

Filters...

Custom... [Select] [Cancel] [Print] [Help]

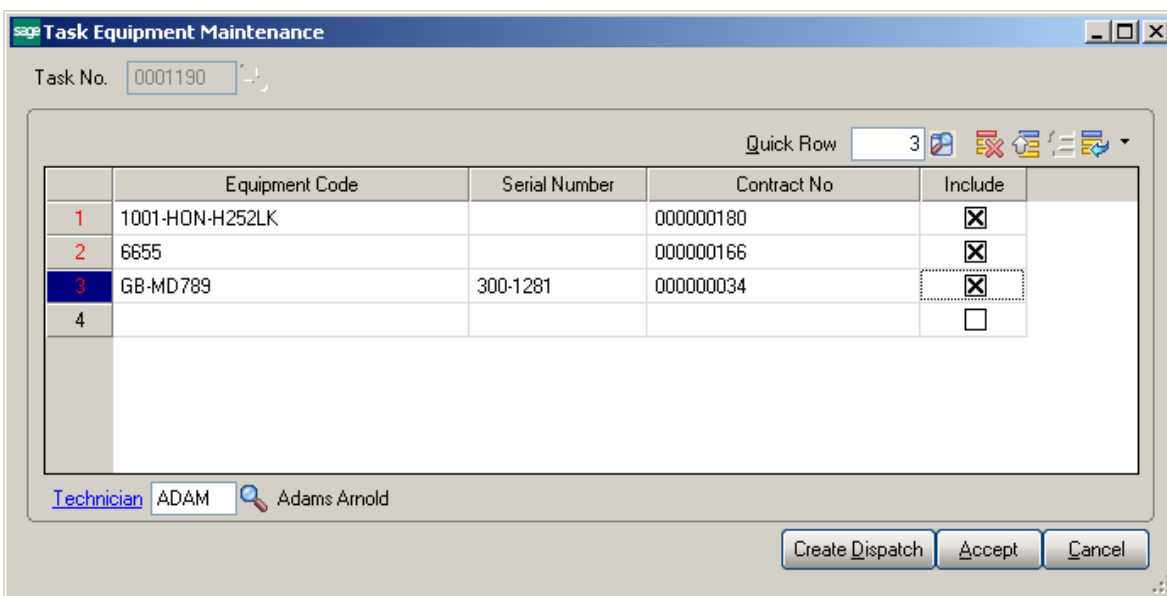
Found 89 records

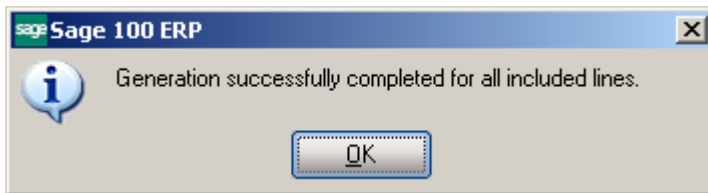
The second lookup button lists all Inventory Items:



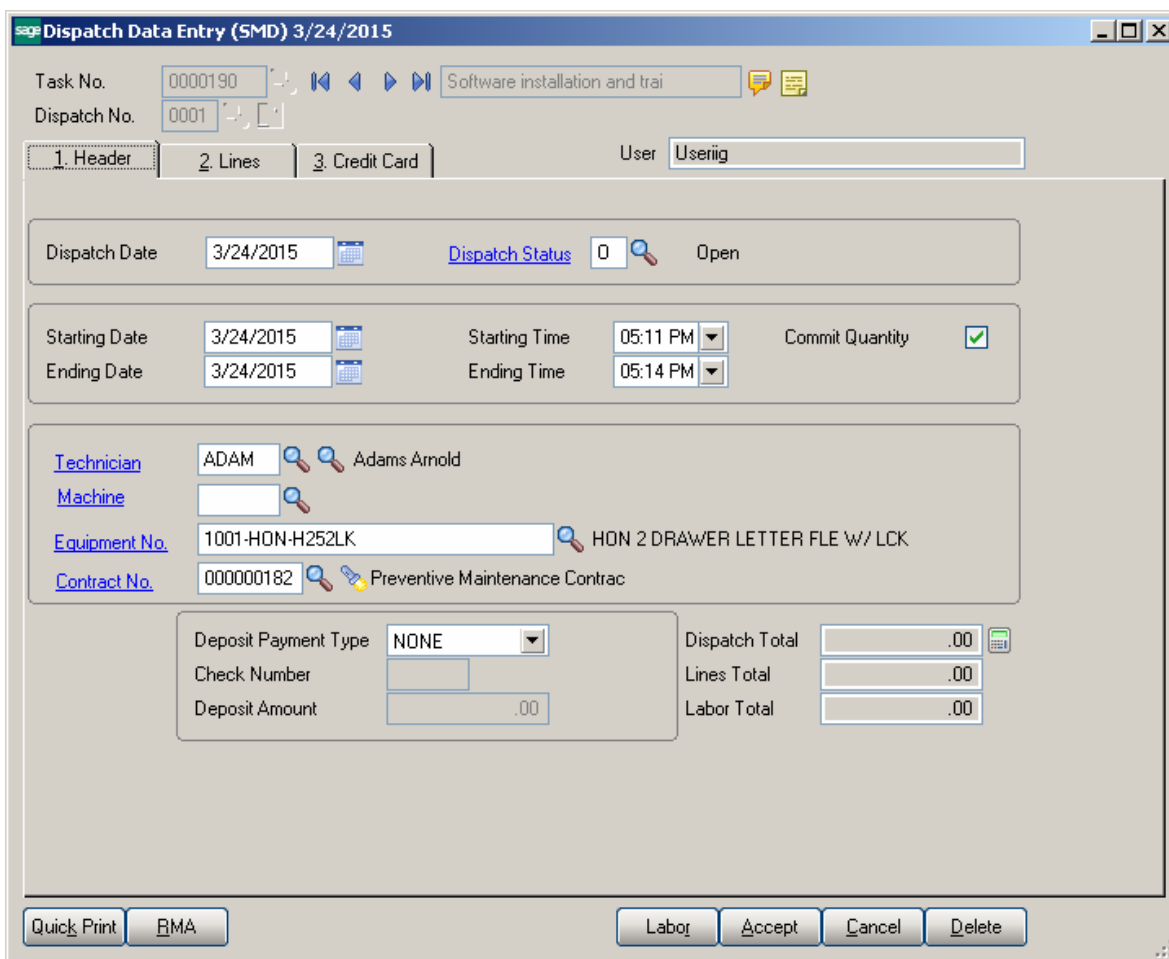
There is an option for generating Dispatches just from the Equipment Maintenance by the Technician number selected.

For generating a Dispatch it is necessary to have a Technician code selected and the Include box checked on the lines for which you want to generate Dispatches.



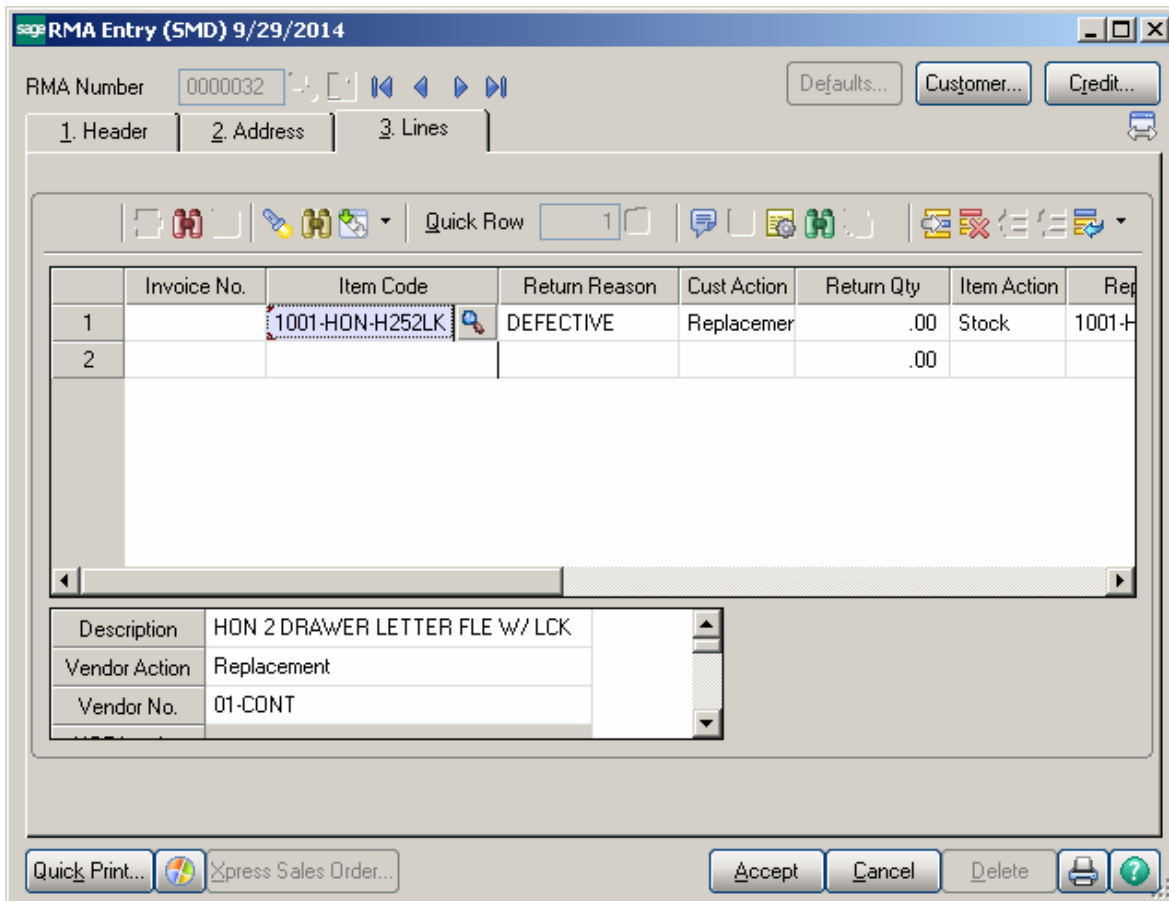


Here is an example of the Dispatch generated from Task Equipment Maintenance:

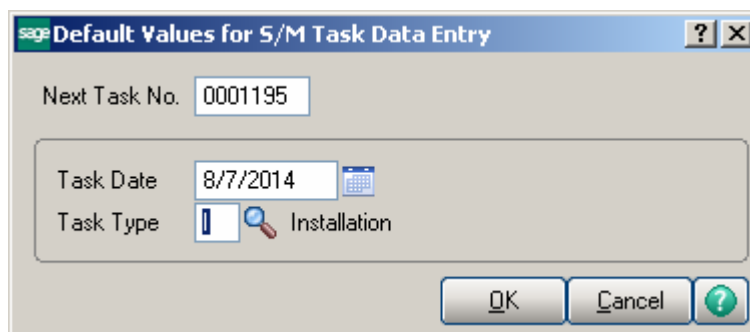
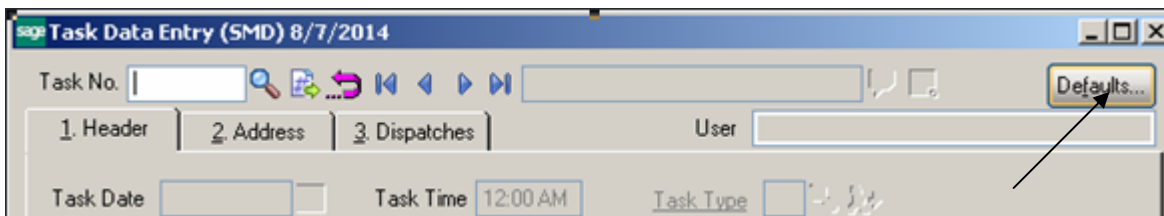


The **Equipment Code** specified in the **Task Equipment Maintenance** is loaded into the **Equipment No** field on the Dispatch header.

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



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.

Response	STD Standard Response 24 hr	Scheduled Date	8/7/2014	Time	04:46 PM
Coverage	HSRV Work hours for services	Due Date	8/12/2014	Time	11:46 AM
Quote Amount	1,200.00	Quote Hours	120.00		

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

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

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

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

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

Here is an example of printout:

Task Printing **SM Demo Company (SMD)**

Task Number: 0000190
Task Date: 3/24/2015 **Task Time:** 5:11:00PM
Customer Number: 01-ABF

Preferred Tech: SantanaJuan
Task type: Service Call
Nature of Task:
Task Status: Entered
Task Priority:
Contract Number:

American Business Futures
 2131 N. 14th Street
 Suite 100
 Accounting Department
 Milwaukee, WI
 53205-1204
 (414) 655-4787 219

American Business Futures
 Racine Warehouse
 5411 Kendrick Place
 Racine, WI
 53120
 (414) 995-4319

Task Description: Software installation and training

Comment: Confirm To: John Queen

Dispatch No.	Dispatch Date	Dispatch Tech.				
0001	3/24/2015	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	1.00	87.000	0.000	87.00
0002190		Repaired	1.00	55.000	0.000	55.00
Dispatch Total :						310.00

When ready for invoicing, please sign and turn into accounting department . **Task Total :** **310.00**

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

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

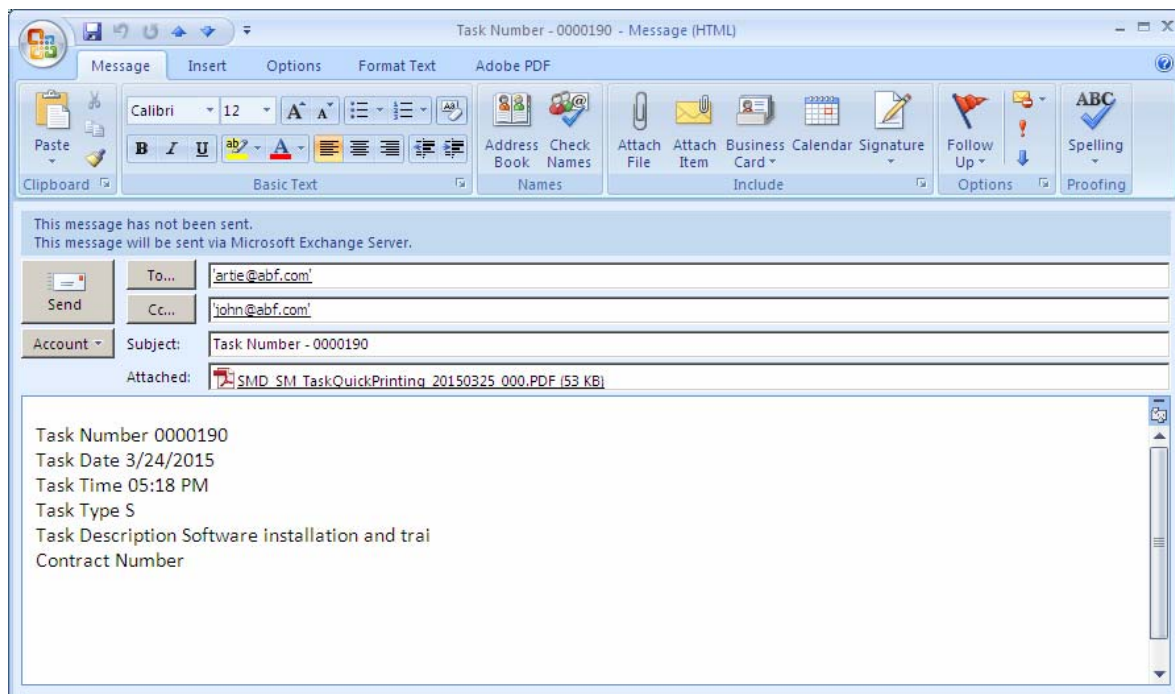
E-Mail Sending

Template Code: TEMP1 Test Template Default

Send to Customer E-mail, Alt-E john@abf.com
 Send To Technician
 Send To Contact john@abf.com

Adobe PDF **Print** **Preview** **Setup**

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



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

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

E-Mail Template Maintenance (SMD) 3/20/2013

Template Code: 01
Description: 01 Template

Quick Row: 13

	Field Name	Text	End Line
1	TaskDate	Task Date	<input checked="" type="checkbox"/>
2	TaskTime	Task Time	<input checked="" type="checkbox"/>
3	TaskNo	Task Number	<input checked="" type="checkbox"/>
4	TaskDescription	Task Description	<input checked="" type="checkbox"/>
5	TaskType	Task Type	<input checked="" type="checkbox"/>
6	SalesOrderNo	Sales Order Number	<input checked="" type="checkbox"/>
7	ContractNo	Contract Number	<input checked="" type="checkbox"/>
8	CustomerNo	Customer Number	<input checked="" type="checkbox"/>
9	BillToName	Bill To Name	<input checked="" type="checkbox"/>
10	ShipToName	Ship To Name	<input checked="" type="checkbox"/>
11	ShipToAddress1	Ship To Address Line 1	<input checked="" type="checkbox"/>
12	ShipToAddress2	Ship To Address Line 2	<input checked="" type="checkbox"/>
13			<input type="checkbox"/>

Buttons: Accept, Cancel, Delete

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 screenshot shows the Sage RMA Entry (SMD) 7/8/2014 window. The window title is "sage RMA Entry (SMD) 7/8/2014". The interface includes a navigation bar with three tabs: "1. Header", "2. Address", and "3. Lines". The "Header" tab is currently selected. The form contains the following fields and controls:

- RMA Number:** 0000037, with navigation buttons (back, forward, search, etc.).
- RMA Date:** 7/8/2014, with a calendar icon.
- Customer No.:** 01-ABF, with a search icon and a calendar icon.
- Contract No.:** 000000026, with a search icon and a calendar icon.
- RMA Status:** New (dropdown menu).
- Expire Date:** 8/7/2014, with a calendar icon.
- Return Via:** MAIL, with a search icon.
- Return To:** 0000, with a search icon and a "Return Addr..." button.
- Ship To:** 2, with a search icon and the text "American Business Futures".
- Confirm To:** John Quinn, with a search icon.
- Comment:** Call Ed for credit approval.
- E-mail:** artie@abf.com, with an email icon.
- Fax No.:** (empty field), with a "Batch Fax" checkbox.
- Checkboxes:**
 - Inspect on Receipt:
 - Cross Ship:
 - Apply Restocking Charges:
 - Print Customer RMA:
 - Print RMA Receiver:

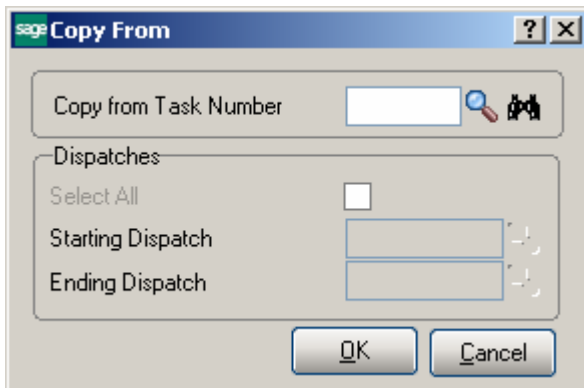
At the bottom of the window, there are buttons for "Quick Print...", "Express Sales Order...", "Accept", "Cancel", "Delete", and a printer icon.

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

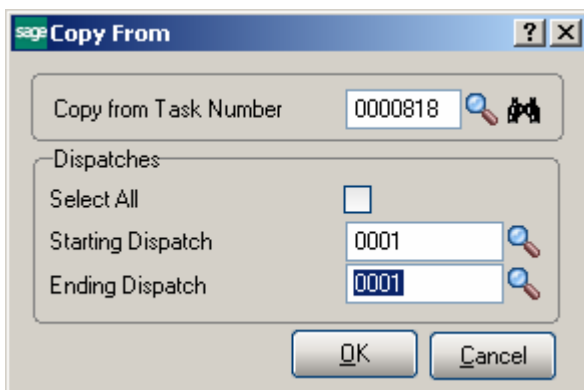
If the Task has an **Item** assigned, the item information is loaded into the **Lines** tab of the RMA Entry. When clicking the **Lines** tab, the item of the task is already selected. Select an invoice, make necessary changes to other fields, and accept the line.

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

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



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



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

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

Task Data Entry (SMD) 8/7/2014

Task No. 0001198 Software Installation and tra Defaults...

1. Header 2. Address 3. Dispatches User Userig

Task Date 8/7/2014 Task Time 05:19 PM Task Type I Installation

Customer No. 01-ABF American Business Futures Credit Card...

Task Status E Entered Salesperson 0100 Jim Kentley

Contract No. 000000176 Dflt Pymt Type NONE

Job Site Code 2 American Business Futures

Job Site Contact John Quinn Cust PO 012333

Nature of Task PROGRAM Install Program Priority Code

Preferred Tech. ADAM Adams Arnold Bill Freq Code 1

Item Number GB-MD789 MODEM 300

Lot/Serial No. 300-1281 Territory CALIF Region California

Tax Schedule CA California Separate Invoice

Default Misc Item SALESTAX Installation Services

Response Scheduled Date 8/7/2014 Time 05:19 PM

Coverage Due Date 8/7/2014 Time 05:19 PM

Quote Amount .00 Quote Hours .00 Disp

Documents Path \\Gohar\Gohar_D\MAS\MAS510\SMP\MAS90\pdf\Tasks\0001198

Quick Print BMA Copy from... Quick Email Accept Cancel Delete

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

Task No. 0001198 Software Installation and trai Defaults...

1. Header 2. Address 3. Dispatches User Useriig

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	8/7/2014	ADAM	Adams Arnold	Open

Quick Print BMA Copy from... Quick Email Accept Cancel Delete

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

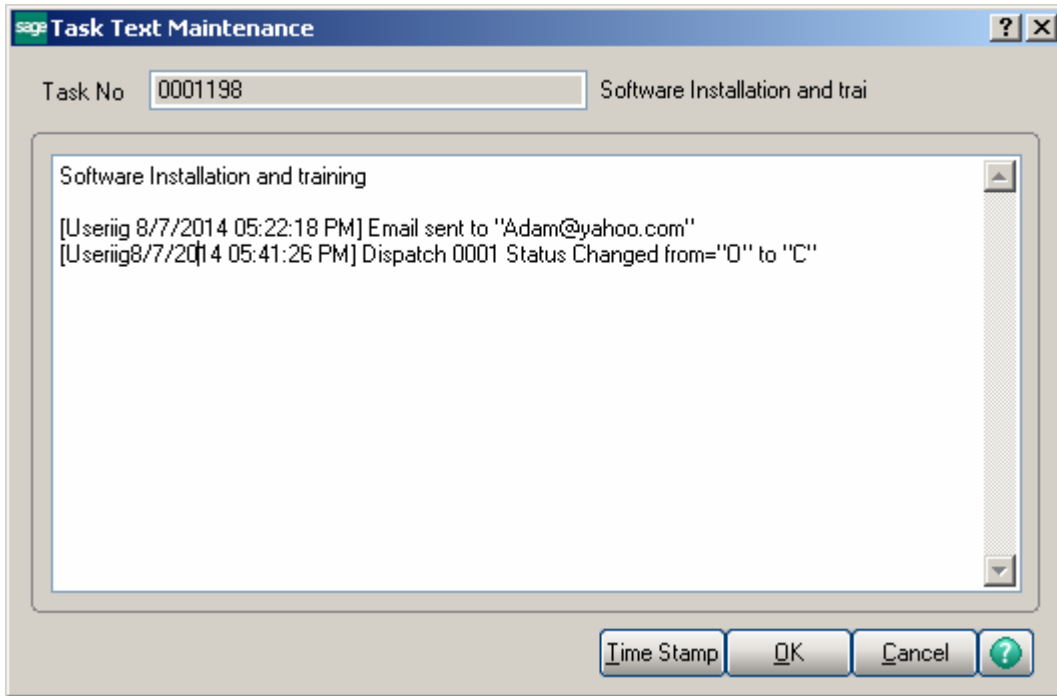
The screenshot shows the Sage Dispatch Data Entry (SMD) window for 8/7/2014. The window title is "sage* Dispatch Data Entry (SMD) 8/7/2014". The main area contains the following fields and controls:

- Task No.: 0001198
- Dispatch No.: 0001
- Task Description: Software Installation and trai
- User: Useriig
- Dispatch Date: 8/7/2014
- Dispatch Status: 0 Open
- Starting Date: 8/7/2014
- Ending Date: 8/7/2014
- Starting Time: 05:19 PM
- Ending Time: 05:19 PM
- Commit Quantity:
- Technician: ADAM (Adams Arnold)
- Deposit Payment Type: NONE
- Check Number:
- Deposit Amount:
- Dispatch Total: 117.98
- Lines Total: 55.00
- Labor Total: 55.00

At the bottom of the window, there are buttons for "Quick Print", "Labor", "Accept", "Cancel", and "Delete".

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

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



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:

	Open Time	Close Time
Monday	8:00AM	5:00PM
Tuesday	8:00AM	6:00PM
Wednesday	8:00AM	6:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	5:00PM
Saturday	9:00AM	2:00PM
Sunday	12:00AM	12:00AM

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

Dispatches Tab

Dispatches tab is intended for generating new dispatches and opening the existing ones. Press the **New Dispatching** button to open the **Dispatch Data Entry** screen for the selected task.

The screenshot shows the 'Task Data Entry (SMD)' window. The title bar indicates the date is 4/29/2015. The 'Task No.' is 0000968 and the 'Manufacturing step' is selected. The 'User' is 'Userig'. The 'Dispatches' tab is active, showing an empty table with columns for 'Dispatch No.', 'Dispatch Date', 'Technician', 'Technician Name', and 'Status'. A 'New Dispatching' button is visible in the top right of the table area. The bottom of the window contains several utility buttons: 'Quick Print', 'BMA', 'Copy from...', 'Quick Email', 'Text Message', 'Accept', 'Cancel', and 'Delete'.

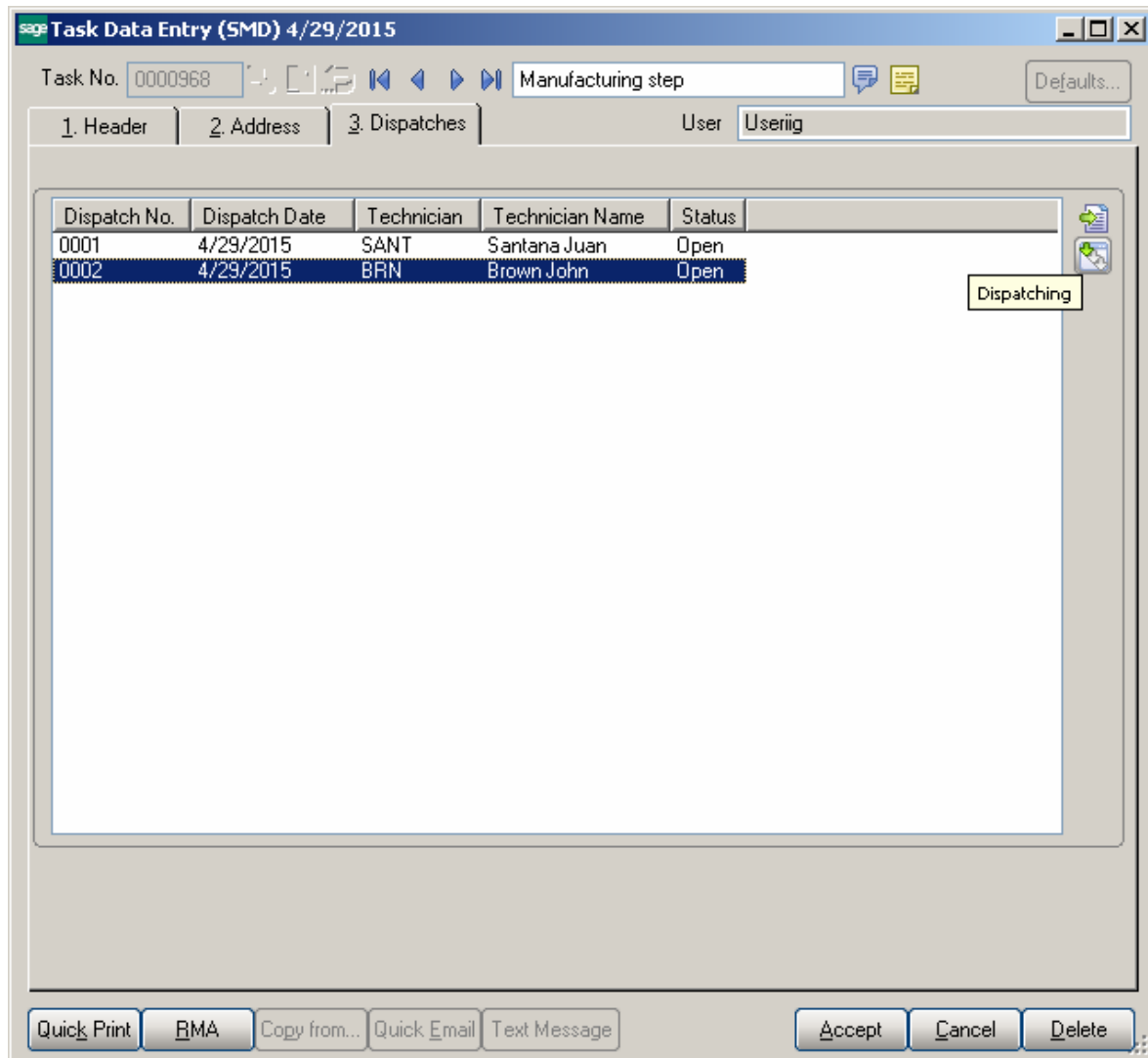
The **Dispatch Data Entry** screen is opened with current Task already selected and ready to add a new dispatch to the task. Press the **Next Dispatch No** button to create a Dispatch. After entering a dispatch; you can continue working with the **Dispatch Data Entry** as usually.

The screenshot displays the Sage Dispatch Data Entry (SMD) interface for the date 4/29/2015. The window title is "Sage Dispatch Data Entry (SMD) 4/29/2015". At the top, there are fields for "Task No." (0000968) and "Dispatch No." (0001), along with a "Manufacturing step" dropdown and a "User" field (Useriig). Below this is a tabbed interface with "1. Header", "2. Lines", and "3. Credit Card" tabs. The "Header" tab is active, showing a "Dispatch Date" of 4/29/2015 and a "Dispatch Status" of 0 (Open). Further down, there are fields for "Starting Date" (4/29/2015), "Starting Time" (05:34 PM), "Ending Date" (4/29/2015), "Ending Time" (05:35 PM), and a checked "Commit Quantity". The "Technician" field is populated with "SANT" (Santana Juan). Other fields include "Machine", "Equipment No.", and "Contract No.". A "Deposit Payment Type" dropdown is set to "CHECK", with fields for "Check Number" and "Deposit Amount" (.00). On the right side, there is a summary table:

Dispatch Total	.00
Lines Total	.00
Labor Total	.00

At the bottom of the window, there are buttons for "Quick Print", "BMA", "Labor", "Accept", "Cancel", and "Delete".

The **Dispatches** tab shows all the dispatches created for current task. Information on that screen reflects the dispatch numbers, dispatch dates, technician codes, technician names and dispatch status.



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

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

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

Task No. 0000969 Cabinet Work / holes

Dispatch No. 0001

1. Header 2. Lines 3. Credit Card User Useriig

Dispatch Date 4/29/2015 Dispatch Status 0 Open

Starting Date 4/29/2015 Starting Time 05:55 PM Commit Quantity

Ending Date 4/29/2015 Ending Time 05:58 PM

Technician ADAM Adams Arnold

Machine

Equipment No.

Contract No.

Deposit Payment Type CHECK CHECK

Check Number

Deposit Amount .00

Dispatch Total	165.00
Lines Total	.00
Labor Total	165.00

Quick Print BMA Labor Accept Cancel Delete

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

Dispatch Date is defaulted to current date, the Starting Date/Time is defaulted from the Task Date and Time and the Ending Date/Time is defaulted to the current date and time. If the type of the Contract assigned to the Task is Fixed Period, then the Dispatch Starting/Ending Dates are validated against the Contract Dates.

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

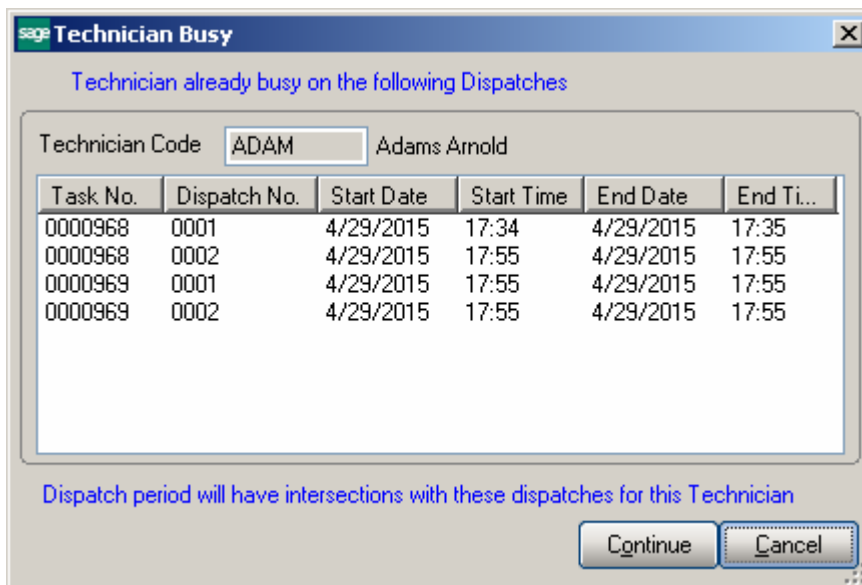
Machine – allows for specifying a machine code for current dispatch. Upon selecting a Machine Code the **Technician** is changed to the one set as Default Technician for current Machine Code in the Machine Code maintenance.

Equipment No – is populated automatically when Dispatch is generated from Task Equipment Maintenance.

Contract No – allows for specifying a Contract for a Dispatch. The lookup button lists all Contracts of current Customer. The Flashlight button lists all contract items allowing the user to select the Contract by Item.

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.

Reservation Process in Dispatch Data Entry

The **Commit Quantity** check box added to the **Dispatch Data Entry Header** tab allows for committing Item when it is entered in the Dispatch line.

Starting Date	4/29/2015	Starting Time	05:55 PM	Commit Quantity <input checked="" type="checkbox"/>
Ending Date	4/29/2015	Ending Time	05:58 PM	

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.

The **Dispatch Total** field displays the sum of Labor and Lines Total included the Tax amount. It is necessary to press the **Recalculate Dispatch Total** button to have the Dispatch Total calculated properly.

Lines Total is populated with the Lines Total Amount and the Labor Total field is populated with the Total Amount of Labor Charge lines.

Dispatch Total	535.00
Lines Total	370.00
Labor Total	165.00

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

Task No. 0000969 Cabinet Work / holes
 Dispatch No. 0001
 User Useriig

1. Header 2. Lines 3. Credit Card

Quick Row 4

	Item Code	Ordered	Unit Price	Extension	Comment
1	1001-HON-H252	2.00	74.000	148.00	
2	/C	.00	.000	.00	
3	1001-HON-H252LK	2.00	87.000	174.00	
4	D1400	1.00	1,700.000	1,700.00	
5	D1000-BBW/LIGHT	2.00	.000	.00	
6	D1000-LHDS	1.00	.000	.00	
7	D1000-LOCK	2.00	.000	.00	
8	D1000-RHDS	1.00	.000	.00	
9	D2000	1.00	.000	.00	

Description Door Installation
 Warehouse 000
 Unit Of Measure EACH
 Price Level 1

Total Amount 2,022.00

Quick Print BMA Labor Accept Cancel Delete

When entering a Kit Item, it is exploded based on the **Explode Kit Items** option set on the Additional tab of Item Maintenance.

If 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.

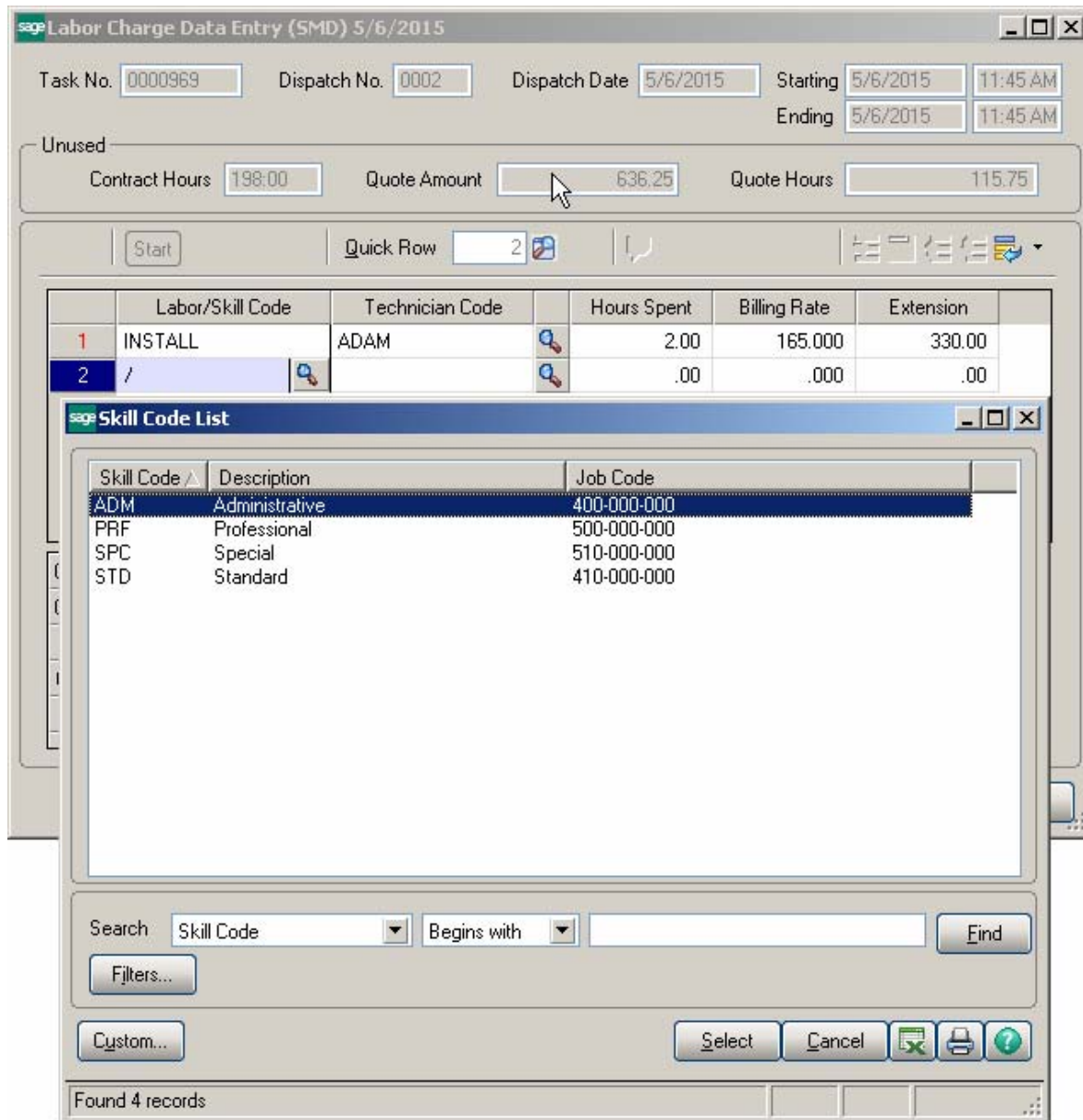
The screenshot shows the 'Labor Charge Data Entry (SMD) 5/6/2015' window. At the top, there are input fields for Task No. (0000969), Dispatch No. (0002), Dispatch Date (5/6/2015), Starting (5/6/2015 11:45 AM), and Ending (5/6/2015 11:45 AM). Below this is an 'Unused' section with Contract Hours (200:00), Quote Amount (966.25), and Quote Hours (117.75). A 'Start' button and a 'Quick Row' dropdown (set to 1) are also visible. The main area contains a table with the following data:

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	INSTALL	ADAM	3.00	165.000	495.00
2			.00	.000	.00

Below the table is a summary section with fields for Over. Start Date (5/6/2015), Over. Start Time (11:45 AM), Retainer Factor (1.00), Overtime Factor (1.50), and an Overtime checkbox. A 'Total Amount' field shows 495.00. At the bottom right are 'Accept', 'Cancel', and 'Delete' buttons.

The **Technician Code** is defaulted from Dispatch header and may be changed on the line.

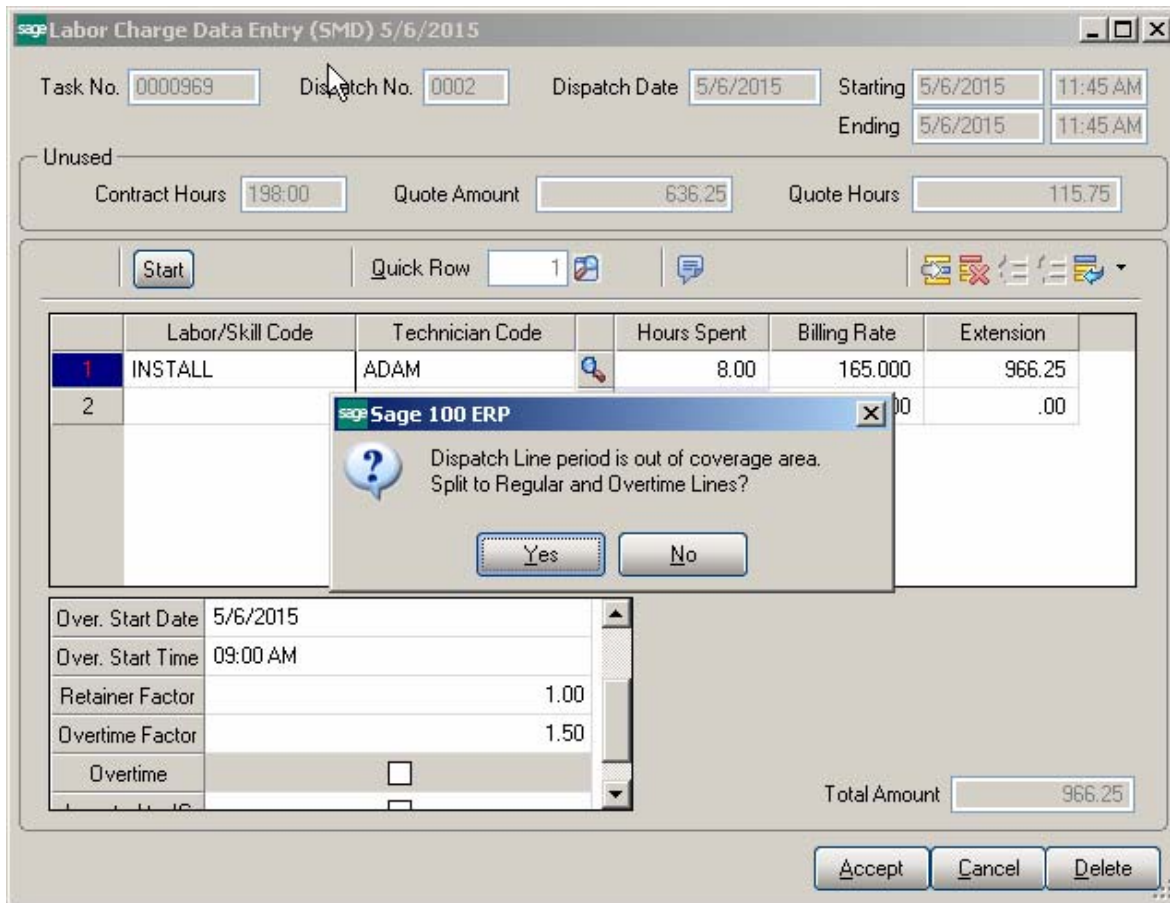
Use the **Labor/Skill Code** field to enter appropriate codes. Use the **Lookup** button to view the list of available labor codes defined in the **Labor Code Maintenance** program. If the user enters “/” in the **Labor Skill Code** field, and then presses the **Lookup** button, it will open a list of available Skill Codes defined in the **Skill Code Maintenance** program.



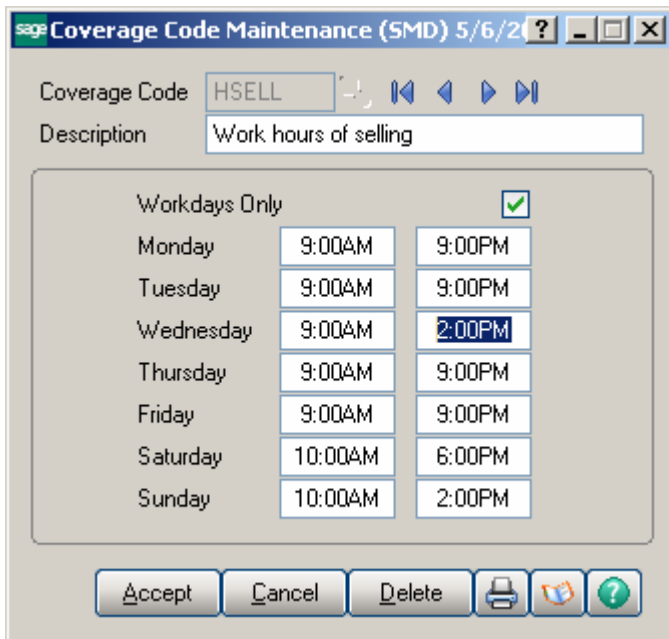
The **Over. Start Date/Time** fields are visible on the **Labor Charge Data Entry** screen, if the **Use Overtime calculation for Labor** box is checked in the **Service Management Options**.

The **Retainer Factor** and **Overtime Factor** fields are available for the tasks of Fixed Hours contracts, if the **Use Overtime calculation for Labor** box is checked in the **Service Management Options**.

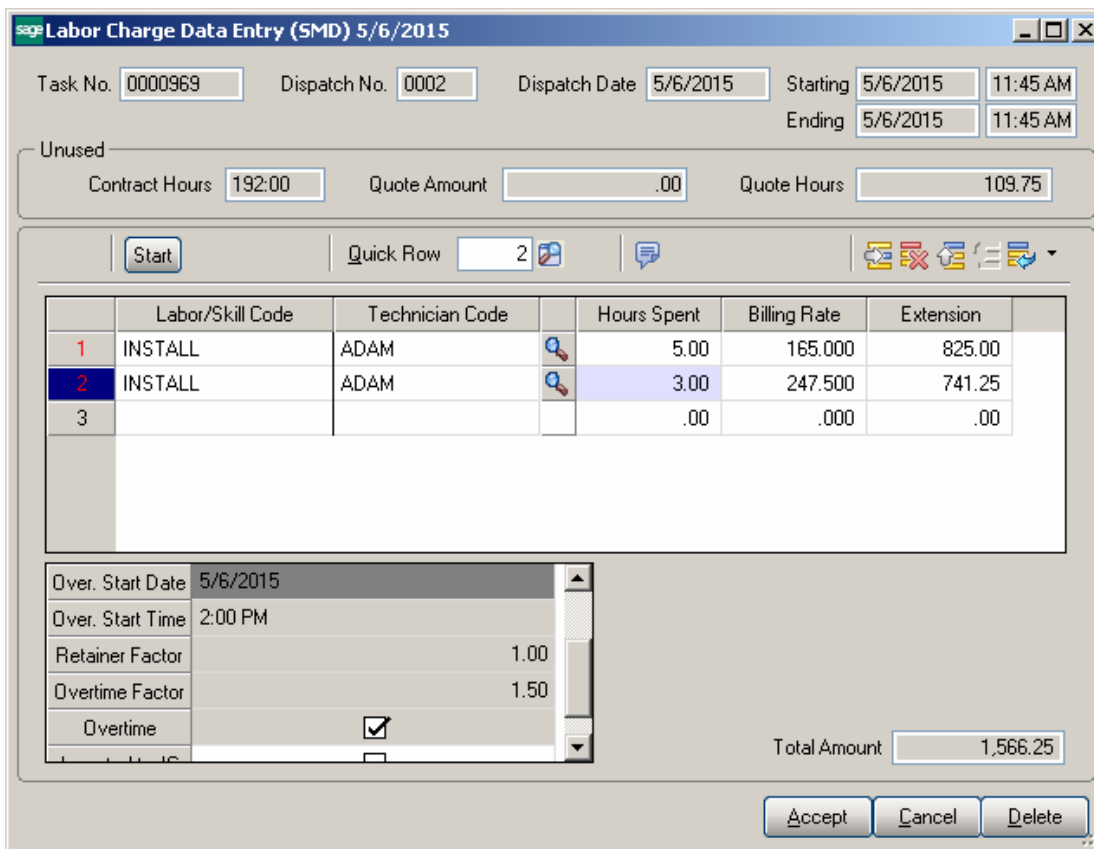
If the period of the line is not completely covered by the coverage area corresponding to the **Coverage Code** of the **Task**, the program will prompt to split the lines:



In our example the Coverage Code of the Task is the foollowing and the work hours for 5/6/2015 (Wednesday) is from 9:00 Am till 2:00PM. So when we enter 8 hours spent a prompt appears about splitting the labor line to regular and overtime lines.



After splitting, a new line is added with the **Overtime** checkbox selected. The Billing Rate for overtime line is calculated as the regular line **Billing Rate * Overtime Factor**.



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

The **Hours Spent** field indicates the amount of time spent by the technician to perform the job.

If the contract type is Fixed Hours, and the Quote Amount is over, the **Discount %** will always be 100% (the hours cannot be billed).

The **Tax Class** field becomes visible if the **Calculate taxes on Labor** option is set to **Dispatch Line** in the **Service Management Options**, and the **Ship-to Address** of the Task has the **Calculate taxes on Labor** box checked. The **Tax Class** will be defaulted to the one of the selected **Labor/Skill Code**.

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

If the **Rate** is changed and that rate has been saved, it will be used for the selected Technician, Labor/Skill, Customer and Contract, next time when entering line for that combination.

Click the **Start** button to register start of working at the selected Line. The Start button will be changed to **Finish**.

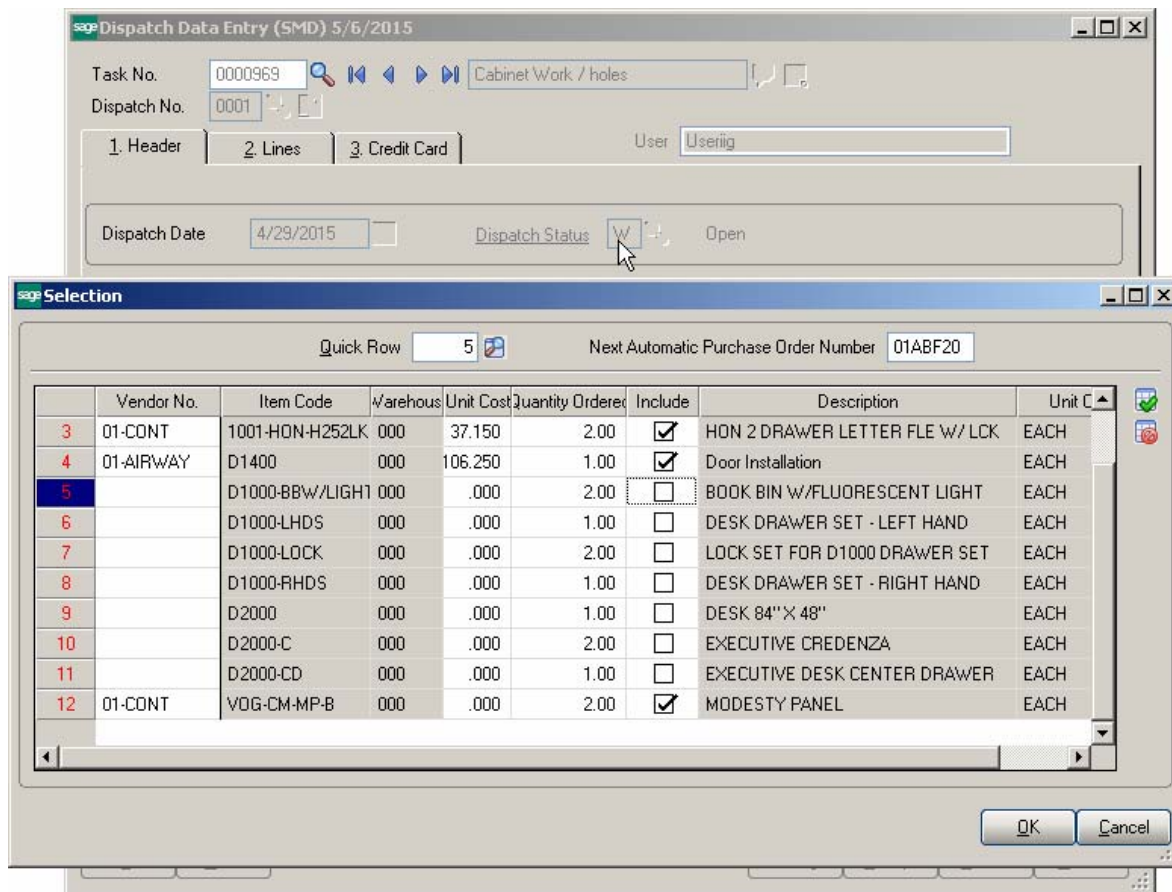
After finishing working at the Line, open the Dispatch and select the Line, then click the **Finish** button. The program will calculate the time between the start and finish of the work and add that time to the **Hours Spent** value.

When the work is started (the button is **Finish**), hold the mouse over the button, to view the Start Date/Time in the tool-tip.

Waiting for Receipt

Select “**W**” in the **Dispatch Status** field, if you wish to automatically generate purchase orders for the items and labor on the dispatch.

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

The screenshot shows the Sage Dispatch Data Entry (SMD) window for 5/6/2015. The task is 'Cabinet Work / holes' with task number 0000969 and dispatch number 0001. The user is 'Useriig'. The 'Dispatch Status' field is highlighted in blue and shows 'Updated Rcpt.'. The starting and ending dates are both 4/29/2015, with starting time 05:55 PM and ending time 05:58 PM. The technician is ADAM (Adams Arnold) and the machine is M01 (Machine 01). The deposit payment type is CHECK. The summary table shows a Dispatch Total of 2,255.75, Lines Total of 2,022.00, and Labor Total of 233.75. Buttons for 'Quick Print', 'BMA', 'Labor', 'Accept', 'Cancel', and 'Delete' are visible at the bottom.

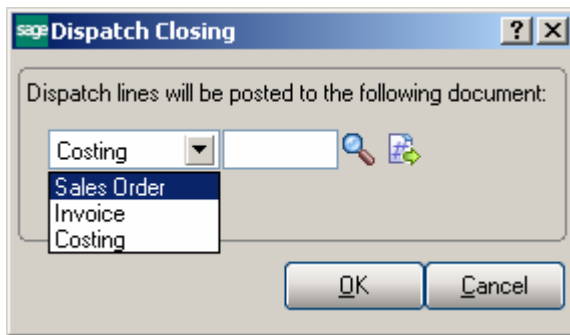
When the items are received in **Receipts of Goods Entry** and updated through the **Receipts Register**, the dispatch status is changed to “**Updated Receipt**”.

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, invoice, costing (I/M Issue Transaction). If task has a Customer PO Number specified it will also be posted to the Sales Order and Invoice.

The screenshot shows a Sage 100 ERP dialog box with a question mark icon. The text reads 'Do you want to generate Sales Order, Invoice or Costing?'. There are two buttons: 'Yes' and 'No'.



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.

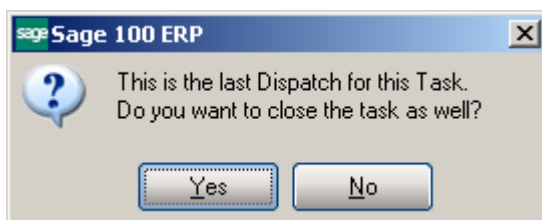
Alternatively, you can assign the next available number by using the **Next Number** icon, and in this case, a new document will be created with all the dispatch numbers listed there.

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.

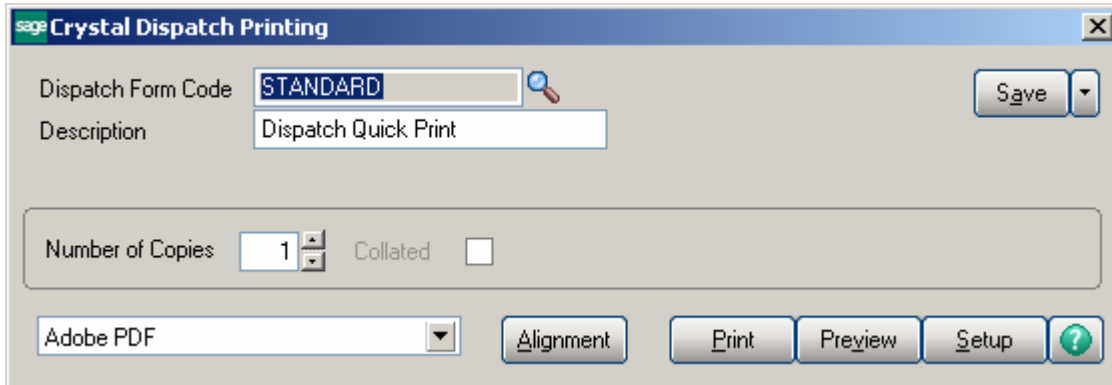


The user is prompted about closing the Task when the last Dispatch for current Task is being closed:

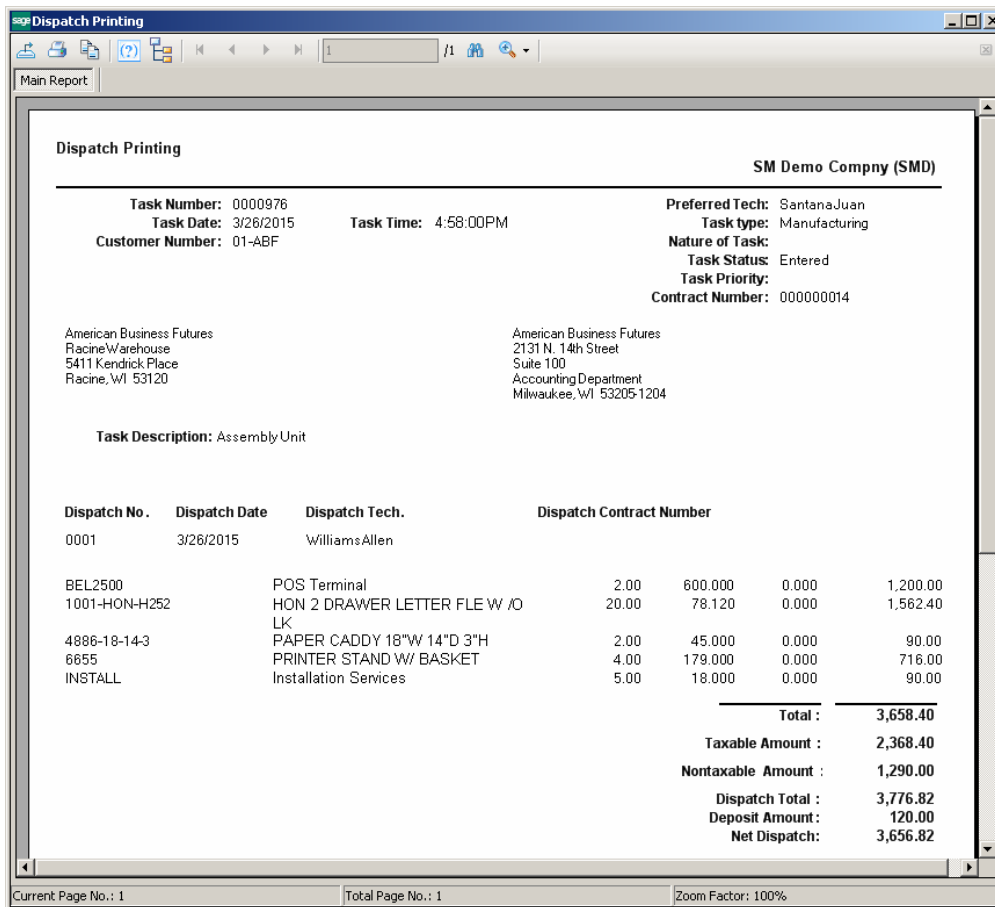


Dispatch Quick Printing

Press the **Quick Print** button to print the Dispatch:



The Dispatch Printing program calculates and prints also the Taxable and Non Taxable Amounts:



The **Dispatch Total** displays the total for all lines of Dispatch, applicable freight, and tax amounts, minus any applicable discount.

If there is **Deposit Amount** on the Dispatch header the **Deposit Amount** and **Net Dispatch** fields are also printed on the report.

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.

Auto Generate Tasks Selection (SMD) 2/14/2014

Generate Tasks for all Contract Items Generate Dispatches for all Contract Items

Up To Date: 2/14/2015

Select Field	Operand	Value
PM Code	All	
Contract No.	Equal to	000000172
Customer Number	All	
Item Code	All	
Nature Of Task	All	

Clear Proceed Cancel [Printer Icon]

The **Generate Tasks for all Contract Items** check box enables generating tasks for either only Contract Default Item or all the Contract Items.

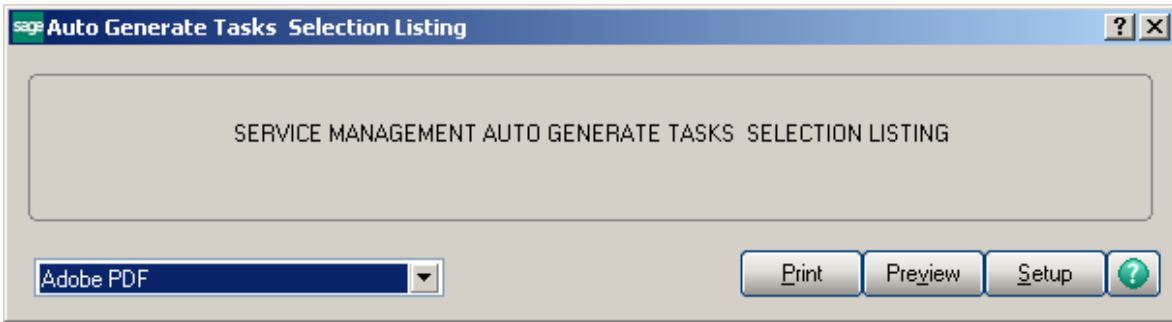
If this check box is cleared, tasks will be generated only for the **Contract Default Item**.

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.

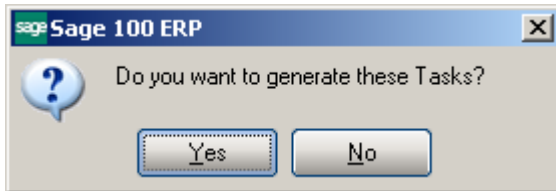
You can select to generate tasks for the contracts in the specified ranges of **PM Codes**, **Contract Numbers**, **Customer Numbers** and **Item Codes**.

Press the Print button to review/print the list of tasks being generated



Contract Number	PM Code	Task Date	Customer Number	Name	Item Code	Lot/Serial No.	Record
00000012	MM	11/15/2013	02JELCCO	Jellico Packing			Header
00000012	MM	12/15/2013	02JELCCO	Jellico Packing			Header
00000012	MM	1/14/2014	02JELCCO	Jellico Packing			Header
00000012	MM	2/13/2014	02JELCCO	Jellico Packing			Header
00000012	MM	3/15/2014	02JELCCO	Jellico Packing			Header
00000012	MM	4/14/2014	02JELCCO	Jellico Packing			Header
00000012	MM	5/14/2014	02JELCCO	Jellico Packing			Header
00000012	MM	6/13/2014	02JELCCO	Jellico Packing			Header
00000012	MM	7/13/2014	02JELCCO	Jellico Packing			Header
00000012	MM	8/12/2014	02JELCCO	Jellico Packing			Header
00000012	MM	9/11/2014	02JELCCO	Jellico Packing			Header
00000012	MM	10/11/2014	02JELCCO	Jellico Packing			Header
00000012	MM	11/10/2014	02JELCCO	Jellico Packing			Header
00000012	MM	12/10/2014	02JELCCO	Jellico Packing			Header
00000012	MM	1/9/2015	02JELCCO	Jellico Packing			Header
00000012	MM	2/8/2015	02JELCCO	Jellico Packing			Header
00000012	MM	3/10/2015	02JELCCO	Jellico Packing			Header
00000012	MM	4/9/2015	02JELCCO	Jellico Packing			Header
00000026	00	4/29/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	4/30/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	5/1/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	5/2/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	5/3/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	5/4/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	5/5/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	5/6/2015	01-ABF	American Business Futures	1001-HON-H252		Header
00000026	00	4/29/2015	01-ABF	American Business Futures	1001-HON-H252		Item
00000026	00	4/30/2015	01-ABF	American Business Futures	1001-HON-H252		Item
00000026	00	5/1/2015	01-ABF	American Business Futures	1001-HON-H252		Item
00000026	00	5/2/2015	01-ABF	American Business Futures	1001-HON-H252		Item
00000026	00	5/3/2015	01-ABF	American Business Futures	1001-HON-H252		Item

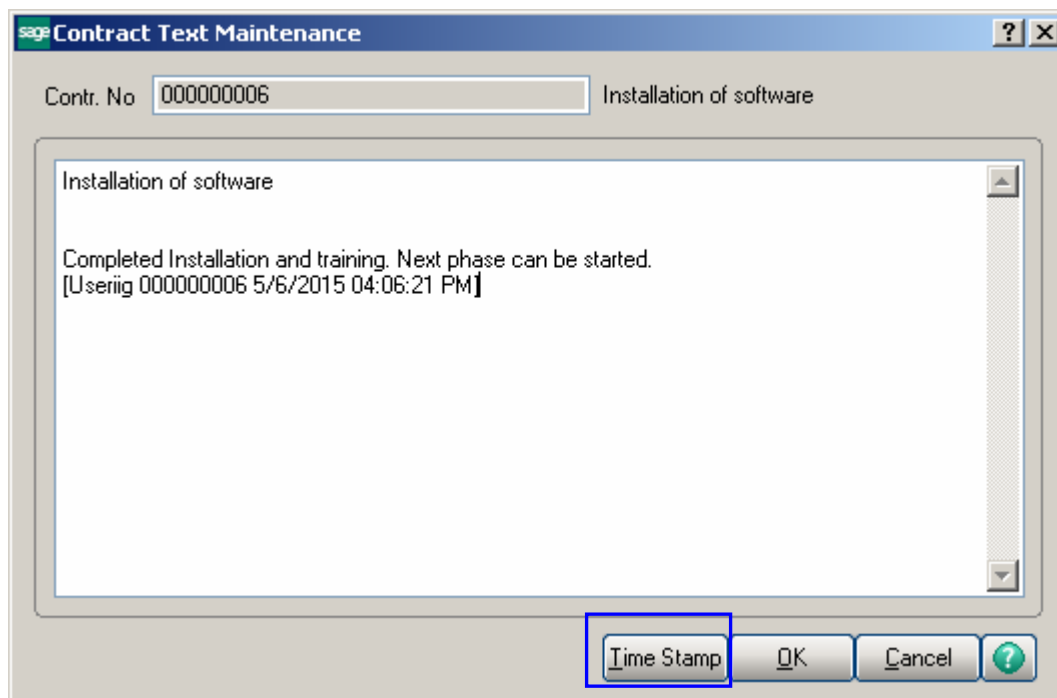
Select Yes to generate the Tasks.



Tracking Changes on Contract and Task Notes

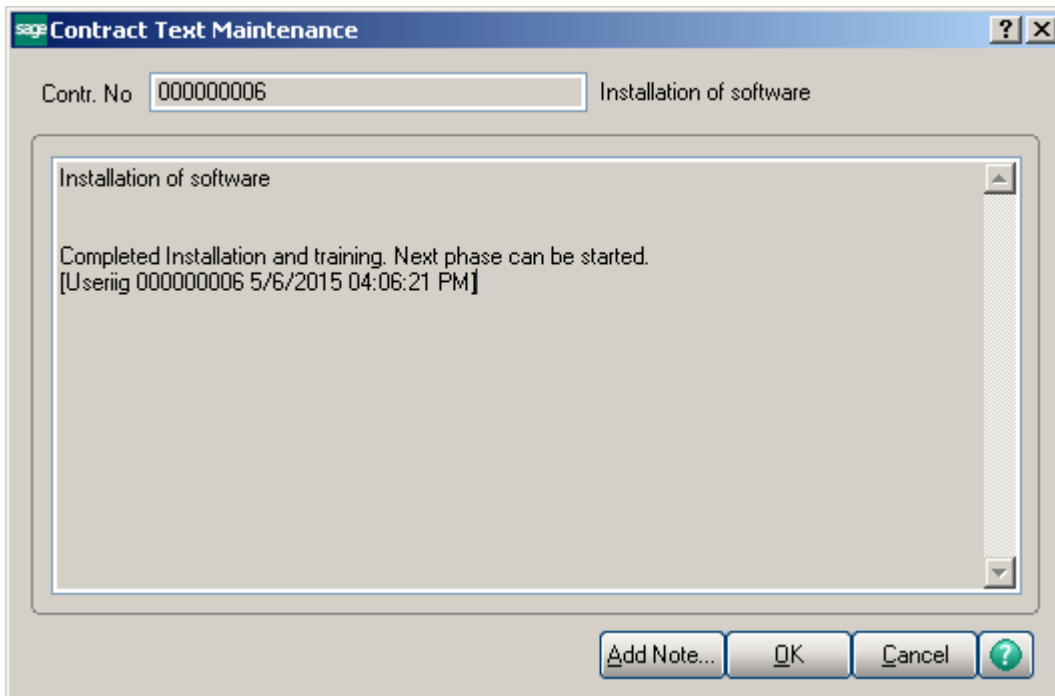
Contract Data Entry

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 can be stamped by the **Time Stamp** button.

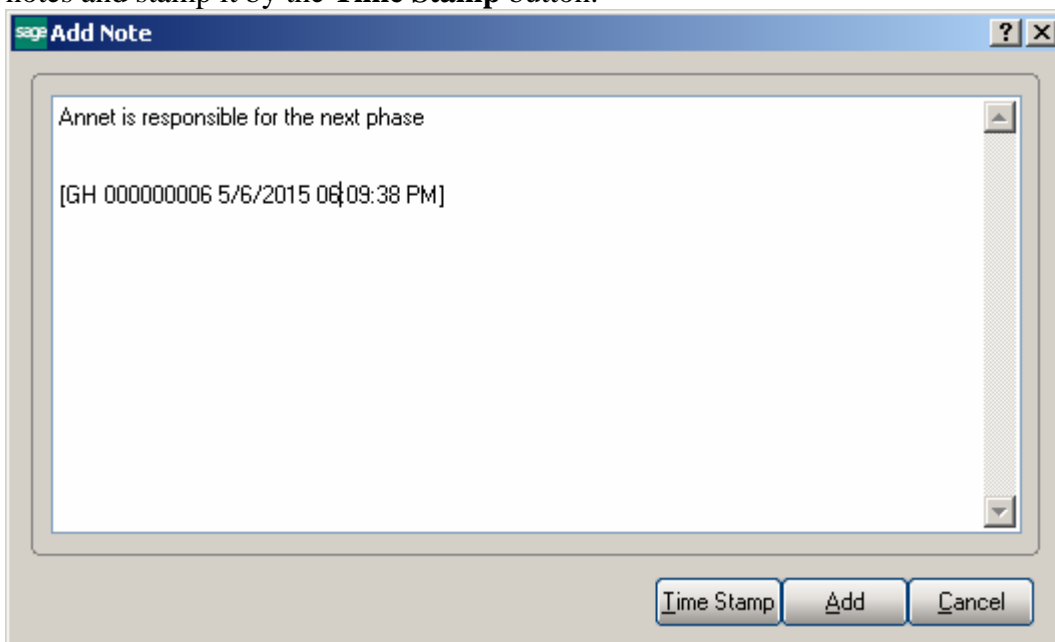


Press the **Time Stamp** button to insert the User ID of the user who edited the Note, the Date and Time when a note is entered /edited. MAS system User ID and the Module Date are applied.

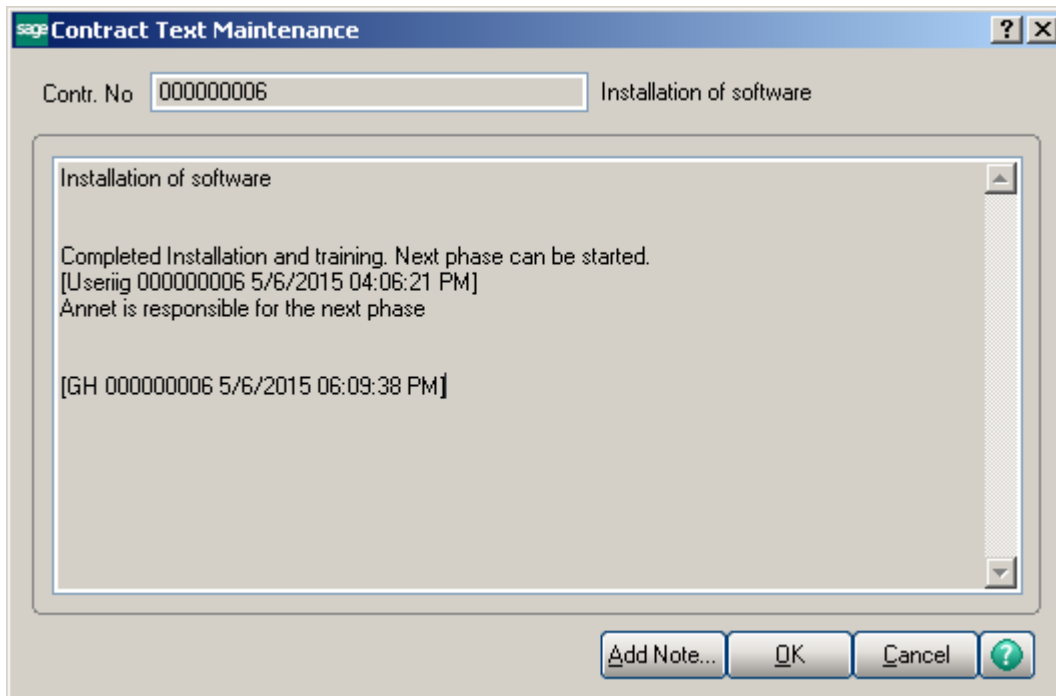
If the user is not authorized to edit the notes, that is, the **Allow Maintain Contract/Task/Dispatch Text** security event is not enabled for that user's Role, the Add Note button is shown on the screen to allow adding new notes without ability of making any changes on the ones already entered:



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 can be stamped by the **Time Stamp** button.

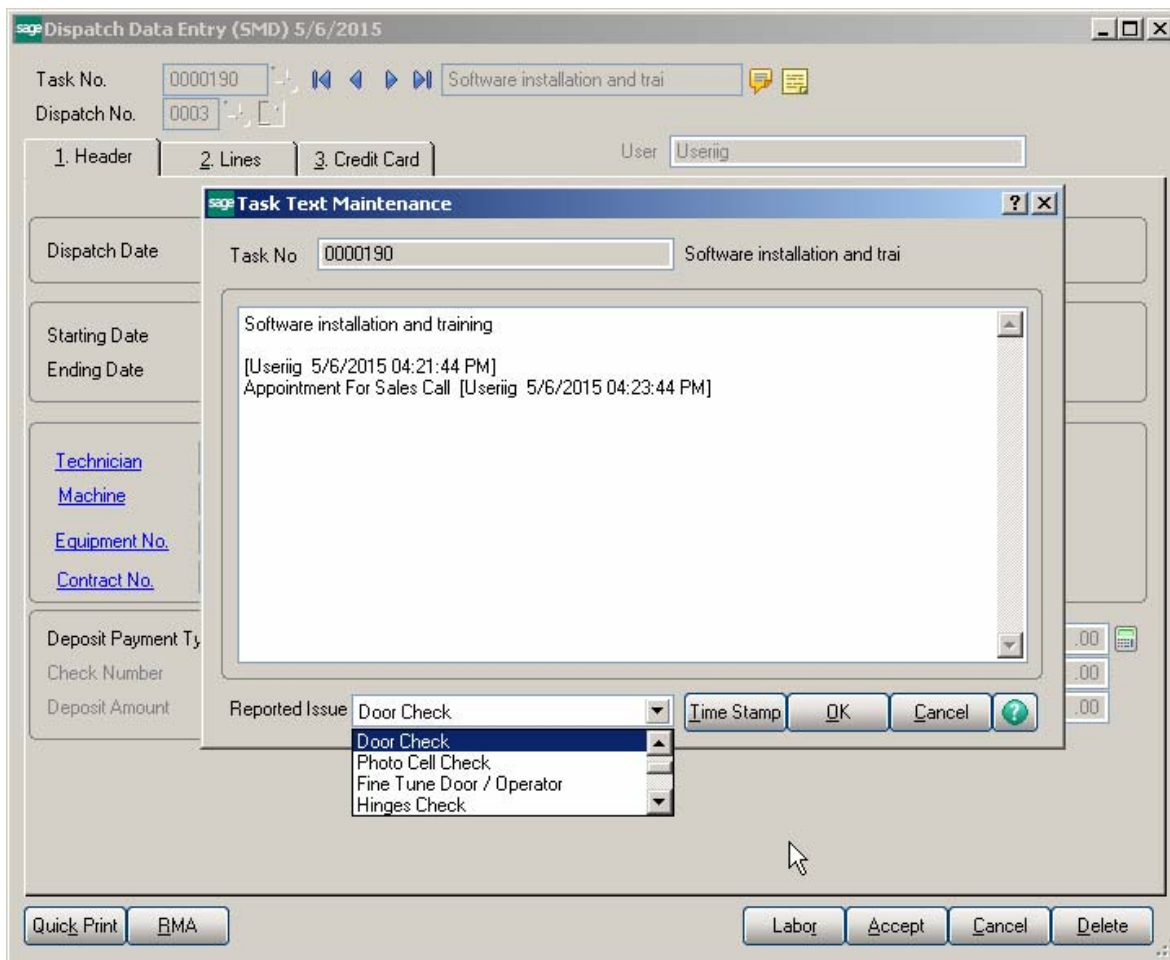
The screenshot shows a software window titled "Task Text Maintenance". At the top, there is a "Task No" field containing "0000190" and a label "Software installation and training". Below this is a large text area containing the following text: "Software installation and training", "[Useriig 5/6/2015 04:21:44 PM]", and "Appointment For Sales Call [Useriig 5/6/2015 04:23:44 PM]". At the bottom of the window, there is a "Reported Issue" dropdown menu with "Appointment For Sales Call" selected. Other options in the dropdown are "Belt / Drive Chain Check", "Cable Check", and "Door Check". To the right of the dropdown are buttons for "Time Stamp", "OK", "Cancel", and a help icon.

The **Reported Issue** drop down lists some common comments / instructions, which can be used when adding notes.

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

Select	Field	Value
	Task No.	All
	Task Date	All
	Contract No.	All
	Customer Number	All
	PM Code	All
	Nature Of Task	All
	Technician Code	All
	Item Code	All
	Task Schedule Date	All
	Task Due Date	All

Task No.	Task Description	Customer No.	Contract No.	Include
----------	------------------	--------------	--------------	---------

The following selection criteria are available:

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

The **Delete** and **Close** actions allows for deleting and closing Tasks, which don't have any open Dispatch.

Undo PM action allows for deleting all the PM tasks/dispatches created.

Calculate Quantity to Produce/Purchase

The **Calculate Quantity to Produce/Purchase** program added under the **Service Management Main** menu is designated to simplify and speed up the work processes of purchasing and the production managers, enabling them to plan more effectively.

This program allows for processing the selected Items and calculating quantity requirements for each Item based on selected MRP run options. The program calculates also the component requirements for each Item by Warehouse.

Field	Operand	Value
Item Code	All	
Order Number	All	
Ship Date	All	

MRP Run Processing Options:

Show Items With Zero Req. Qty- select this checkbox if you want to load the Items with zero quantity required into the material production planning grid.

Include Items Based on SO Selection Only – select this checkbox to include in the demand calculation only the items of the selected Order(s) lines. If the ordered Item is a Bill the program uses the bill of materials structure to disassemble all components into the lowest level items and loads also those items.

Calculate Demand Based on SO – this option is enabled upon selecting the **Include Items Based on SO Selection Only** checkbox. If checked the demand is determined based on the open Sales Orders for the selected Ship Date.

Add SO Items to Selection – this checkbox is enabled only if the above two options are turned off. It allows for adding also Sales Orders’ Items to the Items selected based on other selection criteria.

The **Machine Code** and **Start Date/Time** options are used for Manufacturing Task/Dispatch generation.

The screenshot shows a software window titled "Calculate Quantity to Produce/Purchase". It features a selection criteria panel at the top with checkboxes for "Show Items With Zero Req Qty", "Calculate Demand Based On SO", and "Add SO Items To Selection". Below these are fields for "Machine Code", "Start Date" (set to 9/27/2014), and "Time" (set to 12:00 AM). A "Select Field" table is also present, listing "Item Code", "Order Number", and "Ship Date" with "All" selected for each. The main area is a table with the following columns: Item Code, Whse, Vendor No., Qty On Hand, Quantity On SO, Quantity On B, Quantity On PC, Qty On Tas, Qty Req For Task, Quantity Available, MRP Run Req, Qty Avail MRP Run, and Rec. The table lists various items such as ARS-9101, ARS-9201, ARS-9301, ARS-9401, BB1850, BEL2500, BEL2850, BRN0002100, BRNBUILD, BRNINSTALL, BRNMAKING, and BRNTLLBUILDLL.

	Item Code	Whse	Vendor No.	Qty On Hand	Quantity On SO	Quantity On B	Quantity On PC	Qty On Tas	Qty Req For Task	Quantity Available	MRP Run Req	Qty Avail MRP Run	Rec
64	ARS-9101	000	01-CONT	21.00	.00	.00	.00	.00	.00	21.00	.00	21.00	Econ
65	ARS-9101	001	01-CONT	1.00	.00	.00	.00	.00	.00	1.00	.00	1.00	Max
66	ARS-9101	002	01-CONT	24.00	.00	.00	.00	.00	.00	24.00	.00	24.00	Max
67	ARS-9201	000	01-CONT	163.00	.00	.00	.00	.00	.00	163.00	.00	163.00	Econ
68	ARS-9201	001	01-CONT	17.00	.00	.00	.00	.00	.00	17.00	.00	17.00	Max
69	ARS-9201	002	01-CONT	18.00	.00	.00	.00	.00	.00	18.00	.00	18.00	Max
70	ARS-9301	000	01-CONT	81.00	.00	.00	.00	.00	.00	81.00	.00	81.00	Econ
71	ARS-9301	001	01-CONT	13.00	4.00	.00	4.00	.00	.00	13.00	.00	13.00	Max
72	ARS-9301	002	01-CONT	25.00	.00	.00	.00	.00	.00	25.00	.00	25.00	Max
73	ARS-9401	000	01-CONT	84.00	2.00	.00	2.00	.00	.00	84.00	.00	84.00	Econ
74	ARS-9401	001	01-CONT	1.00	.00	.00	.00	.00	.00	1.00	.00	1.00	Max
75	ARS-9401	002	01-CONT	7.00	.00	.00	.00	.00	.00	7.00	.00	7.00	Max
76	BB1850	000		.00	5.00	.00	.00	.00	.00	5.00	.00	5.00	Econ
77	BEL2500	000		.00	.00	.00	.00	.00	.00	.00	.00	.00	Econ
78	BEL2500	001		.00	54.00	.00	.00	138.00	.00	84.00	.00	84.00	Econ
79	BEL2850	000		.00	.00	.00	.00	.00	.00	.00	.00	.00	Econ
80	BRN0002100	000		.00	.00	.00	.00	.00	.00	.00	.00	.00	Econ
81	BRNBUILD	000		.00	.00	.00	.00	.00	.00	.00	.00	.00	Econ
82	BRNINSTALL	000		.00	.00	.00	.00	.00	.00	.00	.00	.00	Econ
83	BRNMAKING	000		.00	.00	.00	.00	.00	.00	.00	.00	.00	Econ
84	BRNTLLBUILDLL	000		52.00	.00	.00	.00	.00	.00	52.00	.00	52.00	Econ

The following selection options may be applied:

- Item code
- Order Number
- Ship Date
- Warehouse

MRP columns:

- **Item Code** – item number from inventory master file. The program lists all components (purchased or manufactured) to meet the selected items demand
- **Whse** – the warehouse code for the information.

- **Vendor No** – vendor number for purchase items. The Make or Buy drop down in the inventory file is used to determine if a PO is to be generated for the item.
- **Qty On Hand (QOH)** – quantity on hand for the warehouse
- **Qty on SO (SOQ)** – sales order quantity represents quantity on sales orders.
- **Qty on BO (BOQ)** – indicates quantity on back orders.
- **Qty on PO (POQ)** - quantity on purchase orders
- **Qty on Task (TOQ)** - quantity on existing Tasks
- **Qty Req for Task (QRT)** component quantity needed for planned tasks
- **Qty Avail (QAVL)** – is calculated using the formula below:

$$QAVL = QOH - SOQ - BOQ + POQ + TOQ - QRT$$
- **Demand New Requirements (DNR)** - this value represents the requirements on items entered on the bill of material line's tab for any BOM item with negative Qty Avail (QAVL) value. The Demand New Requirement quantity is calculated for component Items only, it doesn't make sense for Bill parent Item. It is calculated as the Bill Recommended Qty multiplied by the component's Quantity/Bill.
- **Qty Avail MRP Run (MRPQ)**, this value is calculated as follows:
 - $MRPQ = QAVL - DNR$
- **Reorder Method** – MAX, ROP or EOQ.
- **Recommended Qty** – is calculated based on the Reorder method as follows:
 - For Max Stock level Reorder method, if the Qty Available is below reorder, Recommended Qty=Buf Max Quantity –MRPQ (Qty Avail MRP Run)
 - For Reorder Point method if Available quantity is below the Reorder, Recommended Qty=Reorder Point Quantity – MRPQ (Qty Avail MRP Run)
 - For Economic Qty method, if Available is below reorder, Recommended Qty=Economic Ord. Quantity
- **Machine Code**- it is necessary to select a Machine Code setup in the Machine Code Maintenance.
- **Include**- select this checkbox to include the line in the Manufacturing WO generation

The following actions are available:

- **Generate Manufacturing Task/Dispatch**
- **Generate PO**

Generate Manufacturing Task/Dispatch- press this button to generate work orders based on the demand calculated.


Generate PO- press this button to generate Purchase Orders for Items with Buy Procurement type. Purchase orders are generated both for components of BOM items or items sold on sales order.

Here is an example of material requirement calculation for Bill Item BEL2500

Press **Proceed** after making the necessary selections:

	Item Code	Whse	MRP Run Req	Qty Avail MRP Run	Reorder Method	order Point Quar	Economic Order Quantity	Maxi On Hand Qty	Recommended Qty	Machine Code	Include
1	4886-18-14-3	001	16.00	128.00	Max Stock Level	10.00	20.00	50.00	178.00		<input type="checkbox"/>
2	6655	001	32.00	255.00	Max Stock Level	10.00	30.00	70.00	325.00		<input type="checkbox"/>
3	BEL2500	001	.00	16.00	Economic Qty	.00	.00	.00	16.00		<input checked="" type="checkbox"/>

The Bill Item is loaded in the grid with its components.

Select the Include checkbox. You can **Include** all lines by pressing the  **Select All** button or just clicking in the box to select an individual line.

The drill down buttons on the right hand of the grid enable drill down to Item Inquiry,

Bill Item Inquiry (enabled for Bill Items), Where used Inquiry (enabled for component Items) and Item Vendor Maintenance.

Here is the Task with respective Manufacturing Dispatch generated for Make Item# BEL2500 by the **Gen Manufacturing** button:

The screenshot shows the Sage Task Data Entry (SMD) interface for 9/27/2014. The window title is "sage Task Data Entry (SMD) 9/27/2014". The task number is 0001212, and the manufacturing step is "Manufacturing step". The user is "Useriig". The task is categorized as a "Service Call" with a task type of "S".

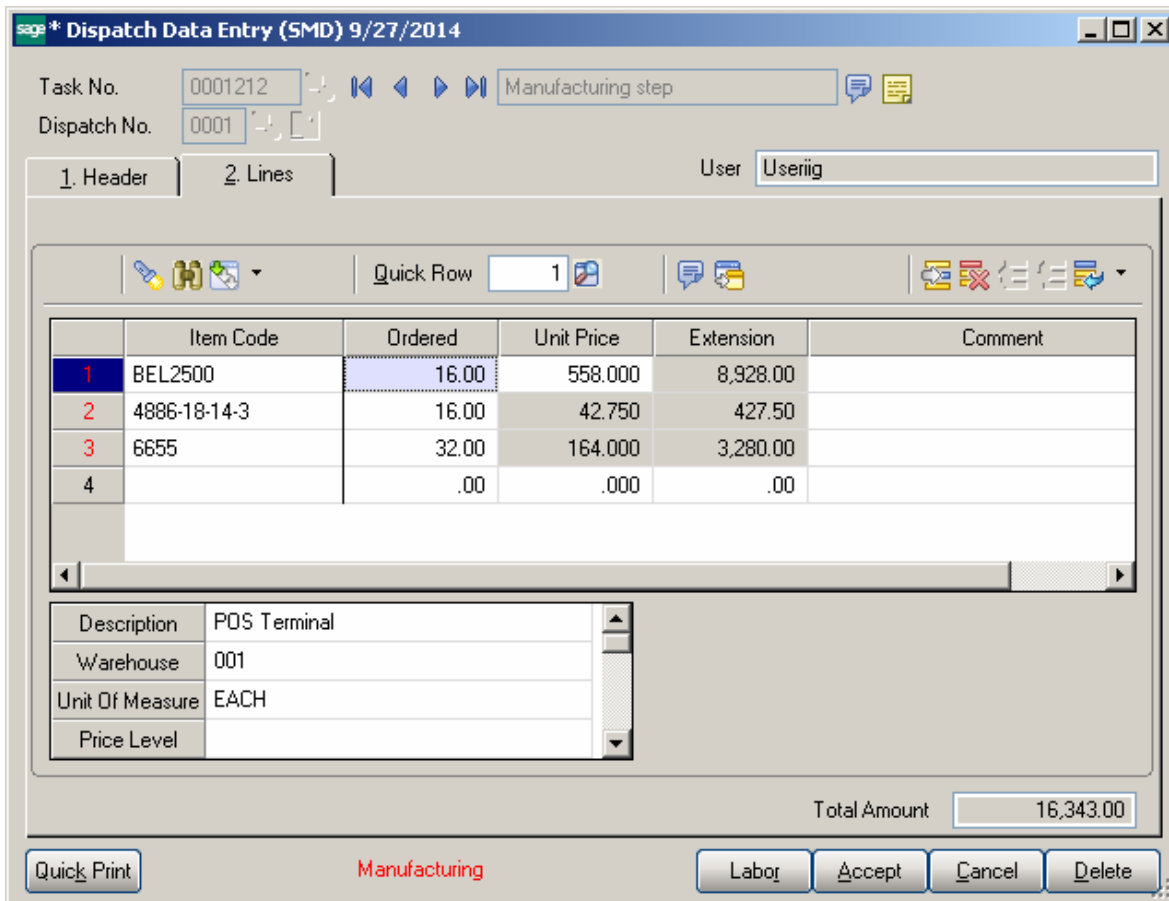
Key fields include:

- Customer No.:** 01-SHEPARD (Shepard Motorworks)
- Task Status:** E (Entered)
- Salesperson:** 0200 (Shelly Westland)
- Job Site Contact:** Alan Shepard
- Nature of Task:** REPAIR (Repair Service)
- Preferred Tech.:** ADAM (Adams Arnold)
- Preferred Mach.:** AM01 (Am Machine AM)
- Item Number:** BEL2500
- Item Description:** Installation Services
- Quote Amount:** .00
- Scheduled Date:** 9/27/2014 (Time: 12:08 PM)
- Due Date:** 9/27/2014 (Time: 12:08 PM)
- Quote Hours:** .00

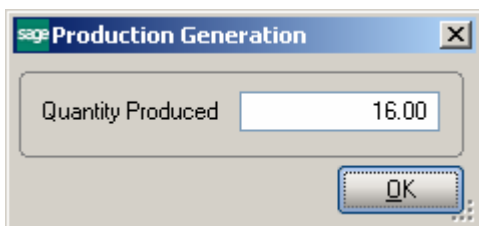
Buttons at the bottom include Quick Print, RMA, Copy from..., Quick Email, Accept, Cancel, and Delete.

The **Customer No** of the generated Task is the **Default MFG Task Customer** entered in the **Service Management Options** window.

Components are loaded from the BOM into the generated Dispatch.



B/M Production is automatically generated upon closing the Dispatch. The Production Generation screen is opened with the quantity on Dispatch defaulted to Quantity Produced. The user is allowed for entry of quantity produced



Here is the Production Entry generated after the manufacturing Dispatch is closed:

The screenshot shows the Sage Production Entry (SMD) window for the date 9/27/2014. The window title is "sage Production Entry (SMD) 9/27/2014". At the top, there are fields for "Production Number" (0000006) and "Batch" (00006). Below these are tabs for "1. Header" and "2. Lines". The main area contains several input fields: "Production Date" (9/27/2014), "Bill Number" (BEL2500), "Bill Type" (Standard), "Revision" (000), "Option Code", "Quantity" (16.00), and "Unit of Measure" (EACH). At the bottom, there are fields for "Parent Warehouse" (001 EAST WAREHOUSE) and "Component Warehouse" (001 EAST WAREHOUSE), along with an "Explode Sub-Assemblies" checkbox. The bottom right corner has buttons for "Accept", "Cancel", "Delete", and a help icon.

Actual Inventory and Labor information from the Dispatch transaction is loaded into the Production Entry transaction.

sage Production Entry (SMD) 9/27/2014

Production Number 0000006 Batch 00006 Defaults...

1. Header 2. Lines

Quick Row 1

Lot/Serial Number

	Component Item Code	Quantity/Bill	Extended Quantity	Comment
1	4886-18-14-3	1.00	16.00	
2	6655	2.00	32.00	
3		.00	.00	

Description PAPER CADDY 18"W 14"D 3"H

Revision

Warehouse 001

Unit Of Measure EACH

Accept Cancel Delete

When Production is generated the **On Task** (for Bill Items) and **Req for Task** (for components) quantities are released. After the Production is updated the Bill Item Qty On Hand is updated with quantity produced.

Item Inquiry (SMD) 9/27/2014

Item Code: BEL2500
 Description: POS Terminal

1. Main | 2. Additional | 3. Quantity | 4. History | 5. Transactions | 6. Orders | 7. Cost Detail

Product Line: C&A CABLES & ACCESSORIES
 Product Type: Finished Good
 Valuation: Standard Cost
 Procurement: Buy
 Weight:
 Volume: 0.0000
 Inventory Cycle: C

Unit of Measure
 Standard: EACH
 Purchases: EACH No. of EACH: 1
 Sales: EACH No. of EACH: 1
 Display on Dispatch Board:

Price Code: STD STANDARD QUANTITY PRIC
 Default Whse: 000 CENTRAL WAREHOUSE
 Primary Vendor:
 Warranty Code:

Sales
 Retail Price: .000
 Standard Price: 600.000
 Last Sold:

Purchases
 Standard Cost: .000
 Average Cost: 185.104
 Last Receipt: 9/27/2014

Last Costs
 Item: 185.104
 Allocated: .000
 Total: 185.104

Whse	Description	On Hand	On PO	On SO	On Bk Ord	Committed	On Task	Req for T...	Available	In Shipping
000	CENTRAL00	.00	.00	.00	.00	.00	.00	.00	.00
001	EAST WA...	16.00	.00	54.00	.00	54.00	134.00	.00	38.00	.00
002	WEST WA...	.00	.00	.00	.00	.00	.00	.00	.00	.00

OK [Print] [Help]

Quick Dispatch Line Entry

The **Quick Dispatch Line Entry** allows for creating Dispatch Lines for a specific Technician without going through all the usual steps. Dispatch may be added only for an existing Task.

Task No.	Disp. No.	Disp. Date	Customer No.	Contract	Labor/Skill	Tax	Disc	Hours	Rate	Extension	Description
0000943	0010	5/5/2015	01-ABF	000000026	INSTALL	TX	0.000	1.00	55.000	55.00	Installation Ser

After entering/selecting a Task press the Next Dispatch number to create next sequential Dispatch for current Task. The **Dispatch Date** is defaulted to S/M module current Accounting Date. If it is changed to another date during Dispatch line entry, that date is saved and will be set for the next dispatch line until you change it manually.

The **Dispatch Starting/Ending Dates** on the Dispatch Data Entry are defaulted to the **Dispatch Date** and may be changed if needed.

The **Dispatch Date** field is disabled for existing Dispatch Lines and it can be changed by the **Edit Dispatch Date** button.

Upon changing the **Dispatch Date** for a Dispatch line in the **Quick Dispatch Line Entry**, the **Dispatch Date**, **Starting** and **Ending Dates** are respectively updated in the **Dispatch Data Entry**.

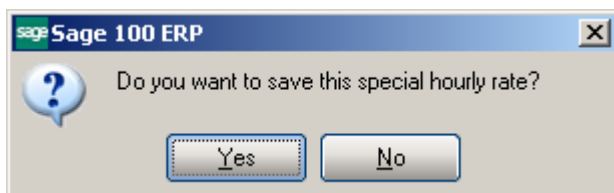
Select **Labor/Skill Code** and enter Hours Spent, Billing Rate, Extension if needed, and click **Ok** to create a Dispatch Line.

The **Tax Class** field becomes visible if the **Calculate Taxes on Labor** option is set to **Dispatch Line** in the **Service Management Options**, and the **Ship-to Address** of the Task has the **Calculate Taxes on Labor** box checked. The **Tax Class** will be defaulted to the one of the selected **Labor/Skill Code**.

The **Tax** column is hidden if the **Calculate Taxes on Labor** option is set to **None**.

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

A prompt appears about saving the special hourly rate upon changing the Rate. If **Yes** is selected in the message to save the rate, it will be applied next time when entering a new Dispatch line for the same Technician, Labor/Skill, Customer and Contract.



Click the **Start** button to register start of working 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.

Quick Dispatch Line Entry (SMD) 5/5/2015

Technician: ADAM Adams Arnold

Customer No.: 01-ABF American Business Futures Contract No.: 000000039 Install

Task Number: 0000128 Manufacturing step Dispatch No.: 0010 Dispatch Date: 5/9/2015

Labor/Skill Code: BUILD Description: Building Services

Start time: 5/5/2015 03:20 PM

Task No.	Disp. No.	Disp. Date	Customer No.	Contract	Labor/Skill	Tax	Disc	Hours	Rate	Extension	Description
0000128	0003	5/5/2015	01-ABF	000000039	BUILD	TX	0.000	3.00	55.000	165.00	Building Service
0000128	0011	5/5/2015	01-ABF	000000039	INSTALL	TX	0.000	.00	155.000	.00	Installation Ser
0000148	0002	5/5/2015	01-AVNET	000000043	BUILD	TX	0.000	2.00	55.000	110.00	Building Service
0000943	0010	5/5/2015	01-ABF	000000026	INSTALL	TX	0.000	1.00	55.000	55.00	Installation Ser
0000971	0001	5/5/2015	01-AVNET	000000044	BUILD	TX	0.000	2.01	175.000	351.05	Building Service
0000128	0010	5/9/2015	01-ABF	000000039	BUILD	TX	0.000	1.25	165.000	206.25	Building Service

Starting View Date: 5/1/2015

Quick Dispatch Line Entry (SMD) 5/5/2015

Technician: ADAM Adams Arnold

Customer No.: 01-ABF American Business Futures Contract No.: 000000039 Install

Task Number: 0000128 Manufacturing step Dispatch No.: 0010 Dispatch Date: 5/9/2015

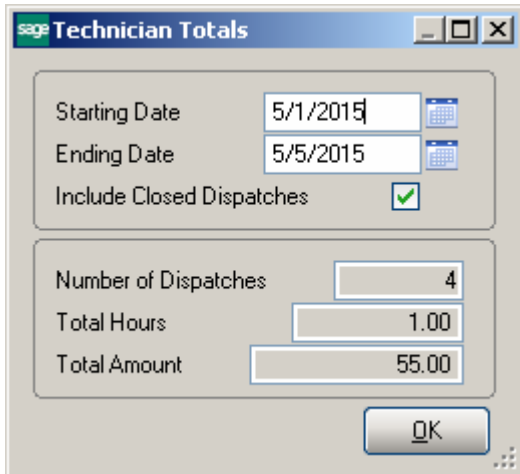
Labor/Skill Code: BUILD Description: Building Services

Start

Task No.	Disp. No.	Disp. Date	Customer No.	Contract	Labor/Skill	Tax	Disc	Hours	Rate	Extension	Description
0000128	0003	5/5/2015	01-ABF	000000039	BUILD	TX	0.000	3.00	55.000	165.00	Building Service
0000128	0011	5/5/2015	01-ABF	000000039	INSTALL	TX	0.000	.00	155.000	.00	Installation Ser
0000148	0002	5/5/2015	01-AVNET	000000043	BUILD	TX	0.000	2.00	55.000	110.00	Building Service
0000943	0010	5/5/2015	01-ABF	000000026	INSTALL	TX	0.000	1.00	55.000	55.00	Installation Ser
0000971	0001	5/5/2015	01-AVNET	000000044	BUILD	TX	0.000	2.01	175.000	351.05	Building Service
0000128	0010	5/9/2015	01-ABF	000000039	BUILD	TX	0.000	1.25	165.000	206.25	Building Service

Starting View Date: 5/1/2015

Clicking the **Totals** button displays the following screen:

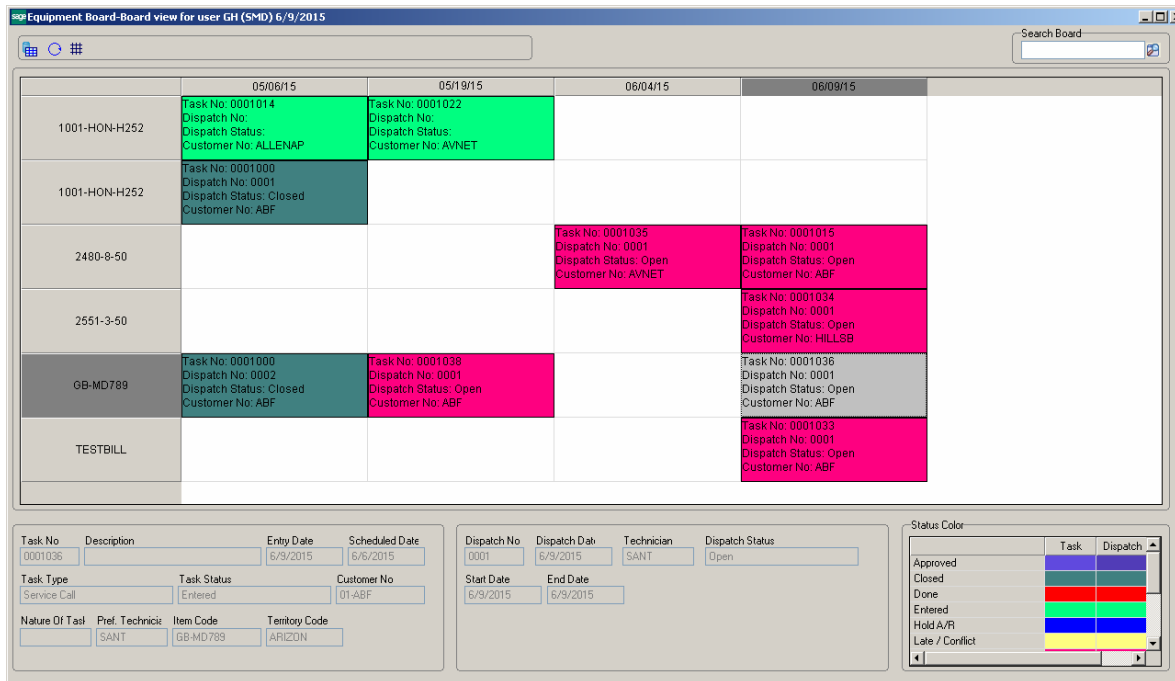


The screenshot shows a dialog box titled "SAP Technician Totals". It contains two main sections. The first section has three fields: "Starting Date" with the value "5/1/2015", "Ending Date" with the value "5/5/2015", and a checked checkbox for "Include Closed Dispatches". The second section has three fields: "Number of Dispatches" with the value "4", "Total Hours" with the value "1.00", and "Total Amount" with the value "55.00". An "OK" button is located at the bottom right of the dialog box.

The **Starting Date** is defaulted to the **Starting View Date** specified on the **Quick Dispatch Line Entry** screen. The Ending Date is set to current System Date. The **Technician Totals** screen displays summary of the Lines added for the selected Technician. The information can **Include Closed Dispatches** also and display the Total of spent Hours and Amount.

Equipment Board

The **Equipment Board** is added under the **Service Management** main menu upon installing the SMP CD. No additional installation is needed for this Board.



The **Board Options** button allows the user to setup board views. When running the Equipment Board first time a default view with “001” Revision is automatically created:

The **Filters** tab on the Equipment Board options allows for applying filters to current Dispatch Board view:

Equipment Board Options (SMD) 6/11/2015

User Logon: Useriig

Revision: 001

Description: Default Revision 001 Default

1. Filters | 2. Fields

Select Field	Operand	Value	
Board Date	Range	6/2/2015	6/9/2015
Customer Number	All		
Contract No.	All		
Task No.	All		
Task Date	All		
Technician	All		
Task Type	All		
Task Status	All		
Nature Of Task	All		
Machine	All		
Dispatch Status	All		
Dispatch Date	All		
Dispatch End Date	All		


Accept Cancel Delete

The **Board Date** field is defaulted to a date range with current Date set as end date and starting date calculated as: “Current Date” – 7 days.

When creating new revision code (board view) the default view settings are copied and may be changed for individual revision (view). After making changes for a revision code in the Equipment Board Options, it is necessary to **Accept** the changes.

On the **Fields** tab the user may choose four data fields to be displayed in the cells of the board. The fields can be selected from the drop-down lists.

You can change the display name of selected fields. After selecting a field from the drop-down list you may type a shorter or more convenient name for the selected field.

The  button allows the user to show or hide blank rows and columns.
 Dates are displayed as columns and Item numbers as rows:

The screenshot shows the 'Equipment Board-Default Revision 001 (SMD) 6/11/2015' window. It features a grid with columns for dates: 05/06/15, 05/19/15, 06/04/15, and 06/09/15. Rows represent different items, each with associated task and dispatch information. A search bar is located in the top right corner.

Item	05/06/15	05/19/15	06/04/15	06/09/15
1001-HON-H252	Task Number 0001014 Dispatch No. Dispatch Status: Customer No: ALLENAP	Task Number 0001022 Dispatch No. Dispatch Status: Customer No: AVNET		
1001-HON-H252	Task Number 0001000 Dispatch No: 0001 Dispatch Status: Closed Customer No: ABF			
2480-8-50			Task Number 0001035 Dispatch No: 0001 Dispatch Status: Open Customer No: AVNET	Task Number 0001015 Dispatch No: 0001 Dispatch Status: Open Customer No: ABF
2551-3-50				Task Number 0001034 Dispatch No: 0001 Dispatch Status: Open Customer No: HILLSB
GB-MD789	Task Number 0001000 Dispatch No: 0002 Dispatch Status: Closed Customer No: ABF	Task Number 0001038 Dispatch No: 0001 Dispatch Status: Open Customer No: ABF		Task Number 0001036 Dispatch No: 0001 Dispatch Status: Open Customer No: ABF
TESTBILL				Task Number 0001033 Dispatch No: 0001 Dispatch Status: Open Customer No: ABF

Below the grid are several input fields for task and dispatch details, and a 'Status Color' legend on the right.

Only the Items flagged as **Display on Dispatch Board** are loaded in the **Dispatch Board**.

The screenshot shows the 'sage Item Maintenance (SMD) 6/9/2015' window. The item code is 1001-HON-H252 and the description is 'HON 2 DRAWER LETTER FILE W/O LK'. The interface includes tabs for Main, Additional, Quantity, History, Transactions, and Orders. Fields for Product Line, Product Type, Valuation, Procurement, Weight, Volume, Inventory Cycle, and Unit of Measure are visible. A checkbox for 'Display on Dispatch Board' is checked and highlighted with a blue box.

There is an option of creating new Task for an Item and a new dispatch for an existing Task.

Equipment Board-Default Revision 001 (SMD) 6/11/2015

	05/06/15	05/19/15
1001-HON-H252	Task Number 0001014 Dispatch No: Dispatch Status: Customer No: ALLENAP	Task Number 0001022 Dispatch No: Dispatch Status: Customer No: A
1001-HON-H252	Task Number 0001000 Dispatch No: 0001 Dispatch Status: Closed Customer No: ABF	

When creating new Task the selected Item is loaded into the Item Number field on the Task header. When creating Dispatch for a Task the Item number is loaded in the **Equipment No** field on the Dispatch Header.

The **Task's Scheduled Date/Due Date** and the **Dispatch's Starting/Ending Dates** as well as the Item No/Equipment No can be changed just by dragging/dropping the Task or Dispatch cell on the Board from one Date/Item to another.

Lookup by Item/Serial Number

The **RMA, Invoice, Sales Order, Contract, Task** and **Dispatch Data Entry** programs have been modified to provide ability to lookup the contract number by item or serial number.

The screenshot shows the Sage Sales Order Entry (SMD) 12/11/2014 software interface. The window title is "sage * Sales Order Entry (SMD) 12/11/2014". The interface includes a top navigation bar with "Order Number" (0000389), "Copy from...", "Defaults...", "Customer...", "Credit...", and "Tasks". Below this is a tabbed interface with "1. Header", "2. Address", "3. Lines", "4. Totals", and "5. Credit Card". The "Header" tab is active, showing fields for "Order Date" (12/11/2014), "Order Type" (Standard Order), "Master/Repeating No.", "Customer No.", "Contract No.", "Cust PO", "Installation Order", and "Management". A tooltip "List Inventory Items by Contracts All" is visible over the "Contract No." field. The "Contract No." field has a binoculars icon next to it. Below the "Contract No." field are fields for "Ship Date" (12/11/2014), "Status" (New), "Reason", "Whse" (001), "EAST WAREHOUSE", "Sales Tax", and "Schedule". To the right of these fields are "Ship To Addr", "Terms Code" (00), "No Terms", "Ship Via", "Confirm To", "E-mail", "Fax No.", "Batch Fax", "Comment", "Salesperson", and "Split Comm." (No). At the bottom of the form are checkboxes for "Print Order", "Print Pick Sheets", and "No. of Ship Labels" (1), along with a "Quick Print Without Displaying Printing Window" checkbox and a "Docs Path" field. The bottom of the window has buttons for "Print Order...", "Print Pick...", "Recalc Price", "Accept", "Cancel", "Delete", and a help icon.

Pressing the binoculars button added next to the Contract Number lookup will open the Items by Contract List allowing the user to select a Contract by Item.

Item Code	ContractNo	Customer No	Lot/Serial No.
GB-MD750	000000004	02-ATOZ	239923923
2480-8-50	000000032	02-AMERCON	
1001-HON-H252	000000001	02-ALLENAP	
1001-HON-H252	000000001	02-ALLENAP	
1001-HON-H252	000000013	02-ALLENAP	
1001-HON-H252	000000023	02-ALLENAP	
1001-HON-H252	000000132	02-ALLENAP	
1001-HON-H252LK	000000023	02-ALLENAP	
1001-HON-H254LK	000000130	02-ALLENAP	
2480-8-50	000000001	02-ALLENAP	FEB-203
2480-8-50	000000001	02-ALLENAP	JAN-10
6655	000000001	02-ALLENAP	
6655	000000023	02-ALLENAP	
D1000	000000013	02-ALLENAP	
D1400	000000081	02-ALLENAP	

Search: Item Code Begins with Find

Filters... Custom... Select Cancel

Found 179 records

Here is the **Items by Contracts** lookup button added on the **Task Data Entry** screen.

sage Task Data Entry (SMD) 12/11/2014

Task No. 0001238

1. Header | 2. Address | 3. Dispatches | User Useriig

Task Date 12/11/2014 Task Time 12:22 PM Task Type I Installation

Customer No. Credit Card...

Task Status E Entered Salesperson Dflt Pymt Type NONE

Contract No. Job Site Code Job Site Contact Cust PO

Nature of Task Priority Code Bill Freq Code

Preferred Tech. Preferred Mach. Item Number Lot/Serial No. Tax Schedule Separate Invoice

Default Misc Item SALESTAX Installation Services Equipment...

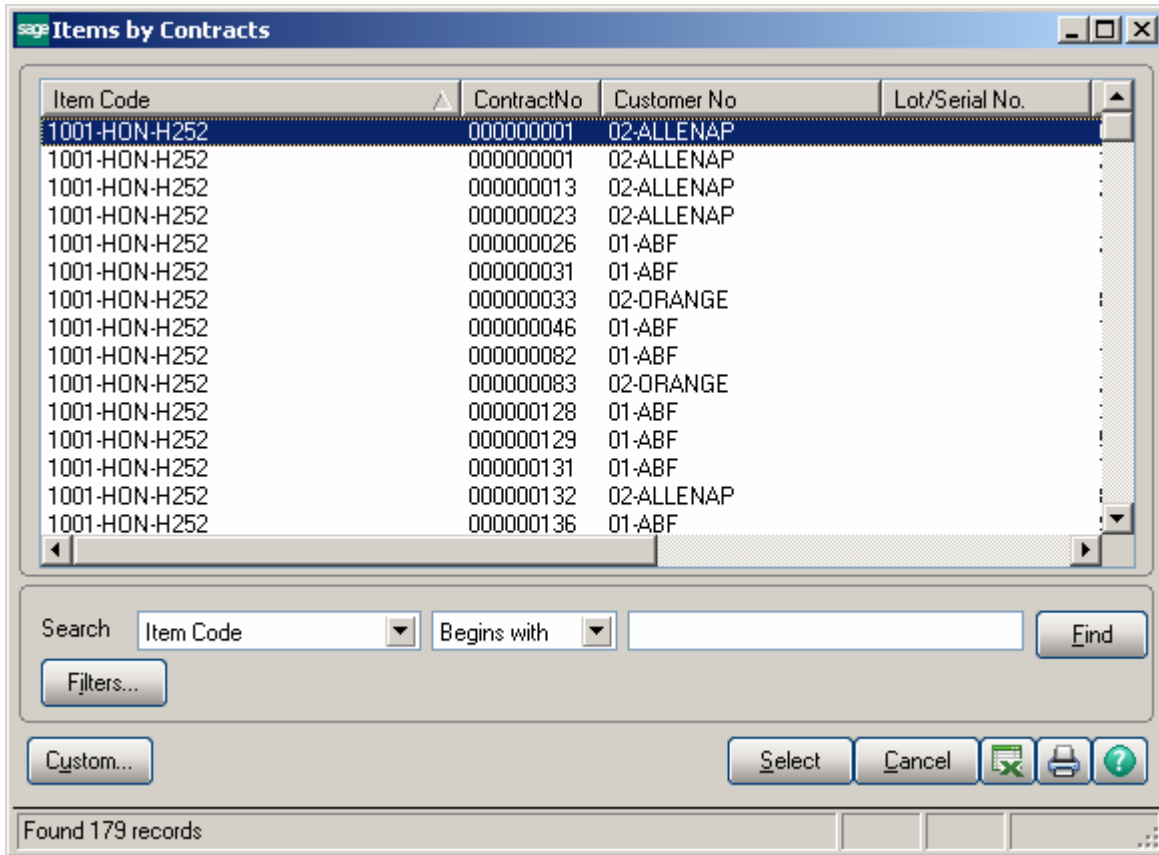
Response Scheduled Date 12/11/2014 Time 12:22 PM

Coverage Due Date 12/11/2014 Time 12:22 PM

Quote Amount .00 Quote Hours .00

Documents Path \\Gohar\Gohar_D\MAS\MAS510\SMP\MAS90\pdf\Tasks\0001238

Quick Print RMA Copy from... Quick Email Accept Cancel Delete



Here is the **Items by Contracts** lookup button added on the **RMA Entry**:

sage RMA Entry (SMD) 12/11/2014

RMA Number 0000039 Defaults... Customer... Credit...

1. Header 2. Address 3. Lines

RMA Date 12/11/2014
Customer No.
Contract No.

List Inventory Items by Contracts All

RMA Status New Expire Date 1/10/2015

Return Via MAIL Return To 0000 DEFAULT RETURN TO ADDF Return Addr...

Ship To
Confirm To
Comment

Inspect on Receipt
Cross Ship
Apply Restocking Charges

E-mail
Fax No. Batch Fax

Print Customer RMA
Print RMA Receiver

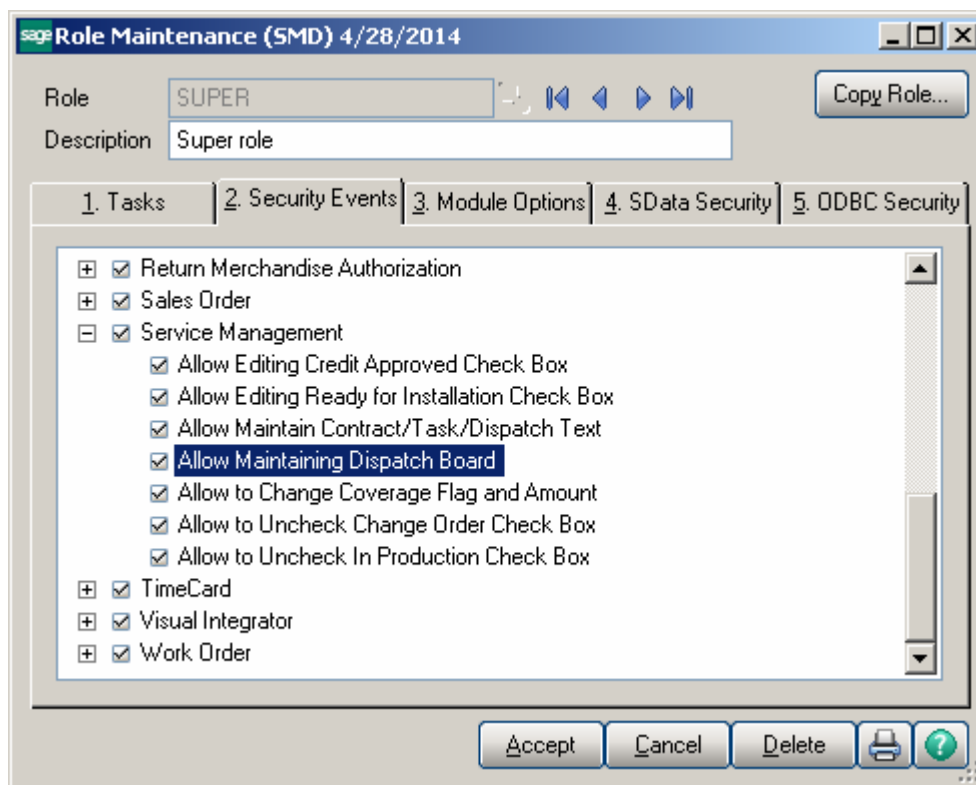
Quick Print... Express Sales Order... Accept Cancel Delete

Dispatch Board

In order to have the Dispatch Board working integrated with Map Point/ Map Quest it is necessary to purchase also the SMM5.10 (Map Point for SMP)/SMQ5.10 (Map Quest for SMP) enhancements.

Role Maintenance

The **Allow Maintaining Dispatch Board** security event has been added in the Role Maintenance to allow or restrict full access to dispatch Board:

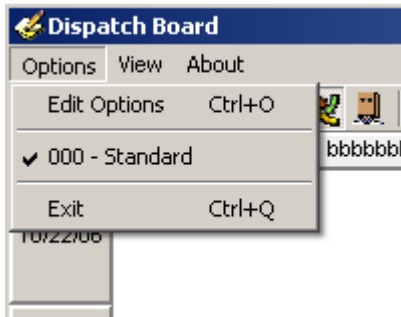


If the **Allow Maintaining Dispatch Board** checkbox is selected for a Role assigned to user, the user can create new Dispatch Board view, new Task/Dispatch, open and modify the Task/Dispatch, change status; otherwise the user can access the Dispatch Board only in the inquiry mode.

Dispatch Board Views

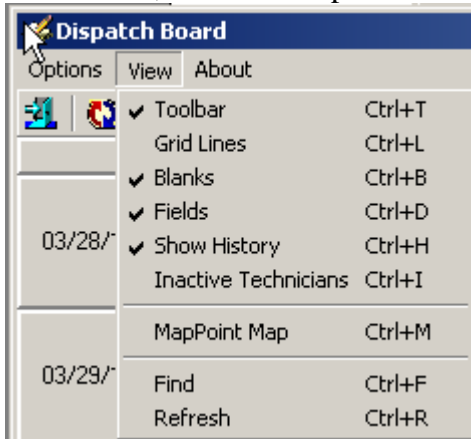
The **Dispatch Board** displays tasks in cells with task dates and technicians placed vertically on the board or horizontally across the top of the board.

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

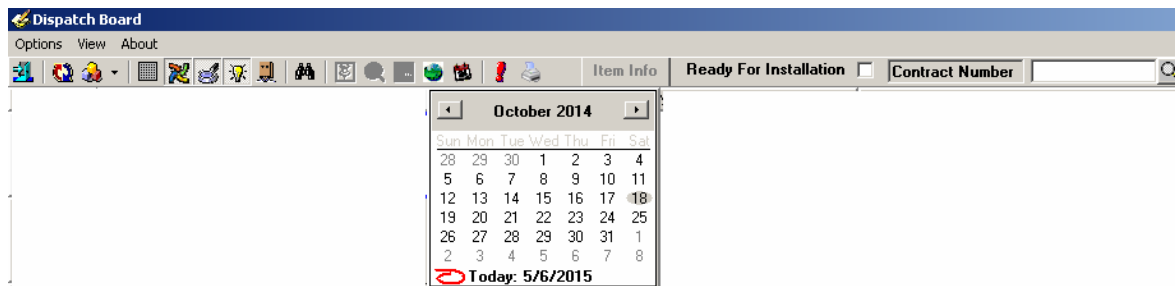


In the **Options** menu, you can select an existing **Options Type**, and **Edit Options** in the **Options for User** dialog box (described later). Current Options Type is indicated with a checkmark.

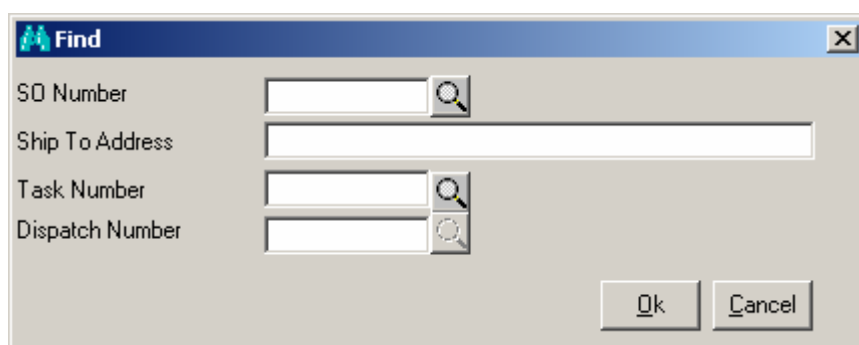
In the **View** menu, you can select to Show/Hide **Toolbar**, **Grid Lines**, **Fields**, **Blanks** (blank rows and columns), **Show History**, **Inactive Technicians**, **Refresh** the Dispatch Board view, and **Find** a specific Task or Dispatch on the Board.



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.

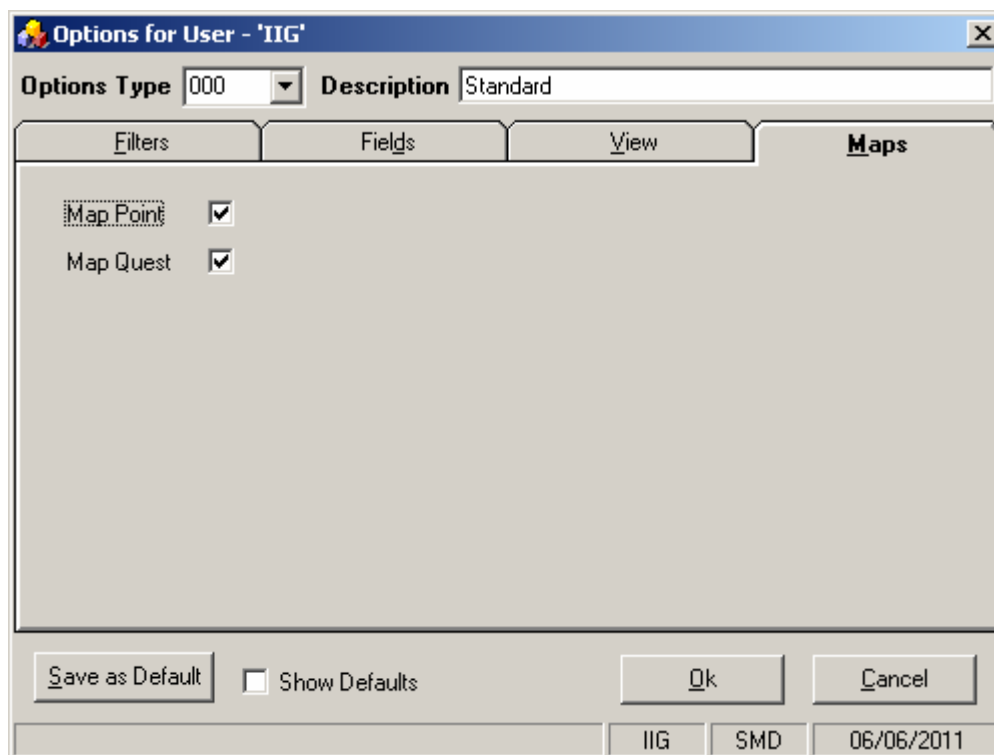


The **Go To** button allows the user to easily locate the cell with respective date on the board. Upon clicking **Go To** button the calendar is opened with the dispatch board view starting date selected. A message will prompt the user to check the options in case the selected **Go To** date falls out of the View Date Range specified in the Board Options.


The **MapGoogle** button opens the Map-Dispatch Board allowing the user to see the Task addresses on the map and get respective directions.

The **MapPoint** and **Map Quest** buttons are available only if the SMM5.10 (Map Point for SMP) and SMQ5.10 (Map Quest for SMP) enhancements are installed and enabled in the Dispatch Board Options:

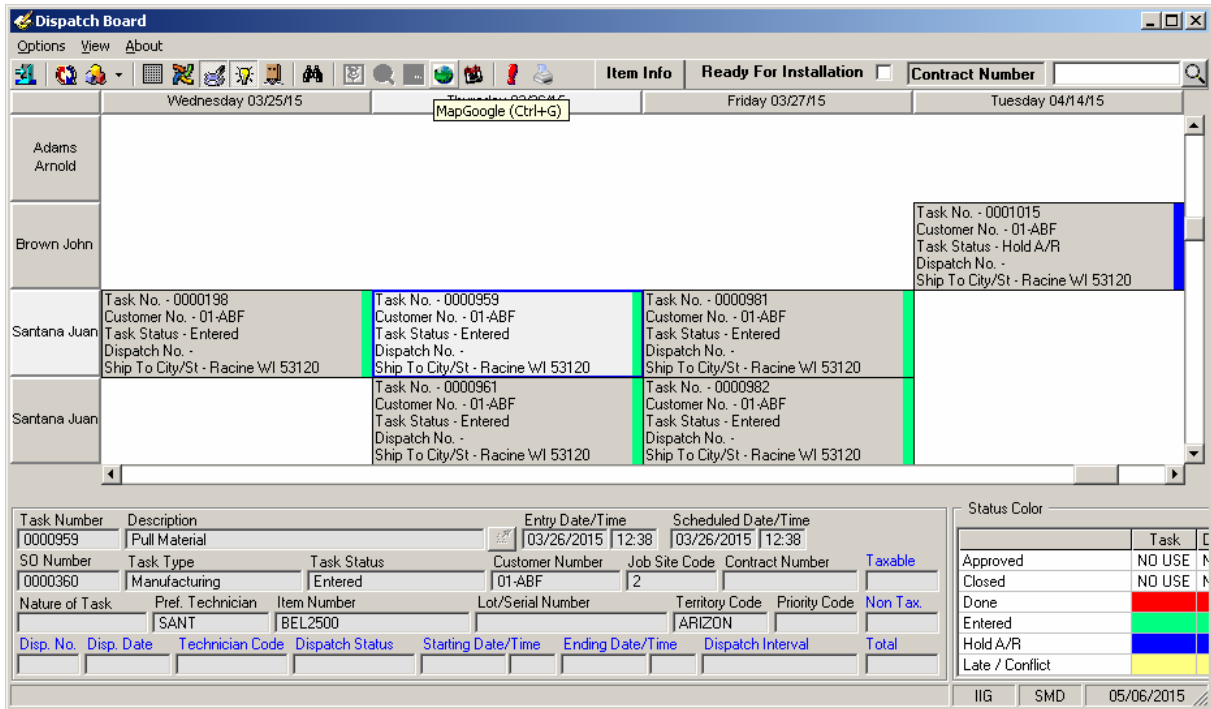
The **Print** button allows for running the **Task Dispatch Report** with the Dispatch View starting and ending dates selected as the **Scheduled Date** and **Dispatch Starting Date** ranges and the Technicians displayed on the board loaded as selection range for **Task Technician** and **Dispatch Technician**.



Map Point and **Map Quest** fields become enabled after installing correspondingly SMM5.10 and SMQ5.10 enhancements. Refer to SMQ510.pdf for details about **Map Quest-Dispatch Board**.

 -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).

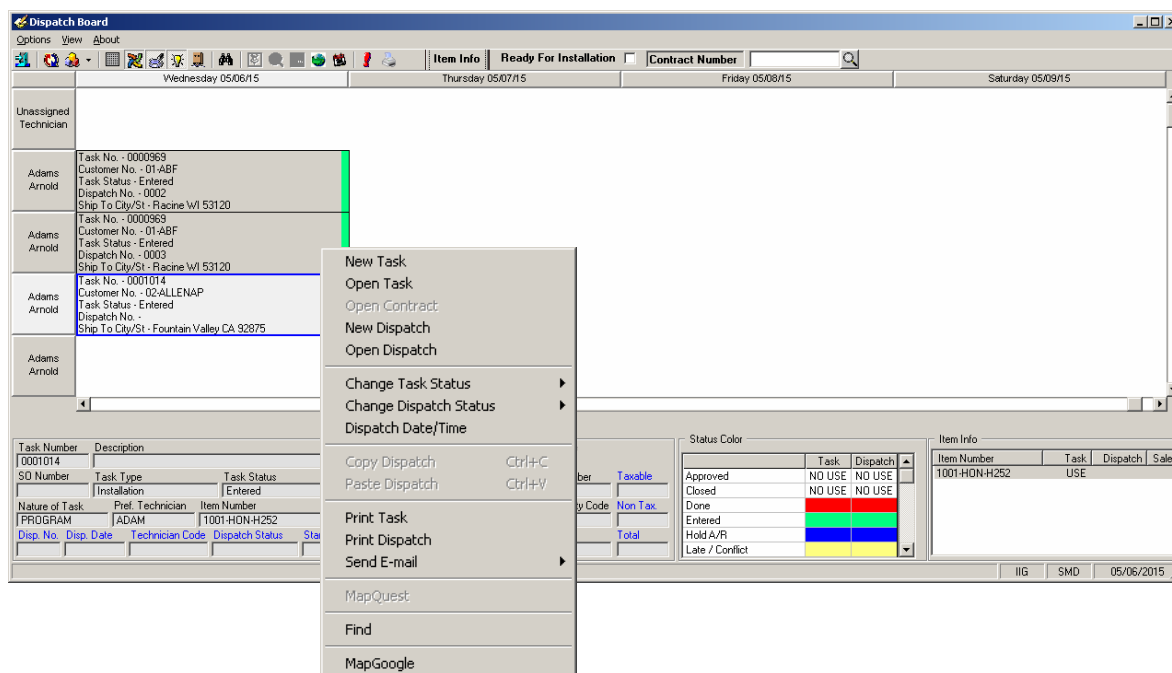
When dragging and dropping Tasks/Dispatches on the Board the Technician on the Dispatch labor line is changed.

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.

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

Send E-mail allows sending emails to Technician, Customer, or Both.

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

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

Dispatch Board Default View

The "**Save as default**" button has been added on the Dispatch Board options screen to allow saving default view and creating new views for other users by copying from the Default View .

The screenshot shows the 'Options for User - IIG' dialog box with the 'View' tab selected. The 'Options Type' is 'DEF' and the 'Description' is 'Default view'. The 'View' tab contains the following settings:

- Show on Startup:**
 - Toolbar
 - Fields
 - Grid Lines
 - Show History
 - Blanks
 - Inactive Technicians
- View Date Range:**
 - Current Week:
 - Number Of Days Before Current Date: 900
 - Number Of Days After Current Date: 1
- Show as:**
 - Column: Technician
 - Row: Date
 - Duplicate: Duplicate
 - Unassigned Technicians:
 - Freeze:
 - Show despite the filtering:
- Color:**
 - Use color for Tasks in Color Bars:
 - Use color for Dispatches in Color Bars:
 - Show Color Bars Over Text:
- Sort of the same duplicate by:** Task Number
- Days Of Week
- Date/Time Range
- Process more than one task at time

Buttons at the bottom: Save as Default, Show Defaults, Ok, Cancel, Delete. The status bar shows IIG, SMD, and 04/28/2014.

For the newly added Options Type the **Save as Default** button is disabled until the record is created (OK is pressed).

Options for User - 'IIG'

Options Type: **DEF*** Description: Default IIG Copy from Default

Filters | Fields | View | Maps

Field Name: All Starting Ending

Date 01/01/1900 12/31/2099

Fields	Starting	Ending
<input type="checkbox"/> Date	01/01/1900	12/31/2099
<input checked="" type="checkbox"/> Technician Number		////
<input checked="" type="checkbox"/> Task Number		////////
<input type="checkbox"/> Division - Customer Number 00-		99-////////
<input checked="" type="checkbox"/> Task Status		Z
<input checked="" type="checkbox"/> Task Type		Z
<input checked="" type="checkbox"/> Task Priority		Z
<input checked="" type="checkbox"/> Skip To Code		////

Show Unchecked Lines Only

Save as Default Show Defaults

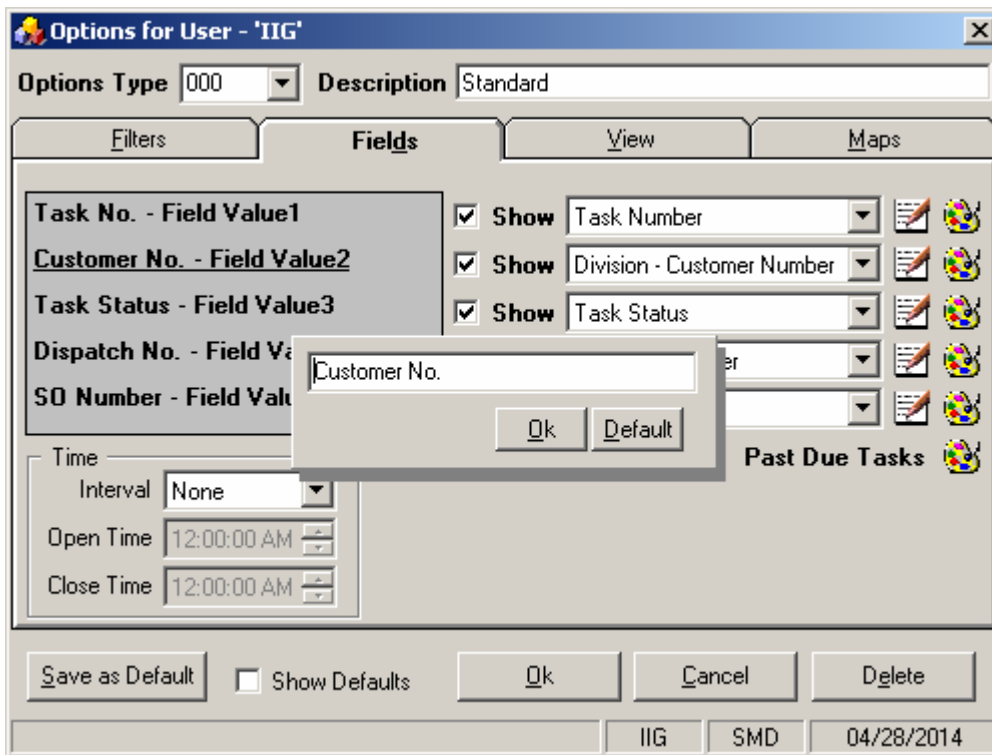
IIG SMD 04/28/2014

Select the **Show Defaults** checkbox to see only the Options Types saved as default. Default views are marked with “*”.

When new **Options Type** (new View) is created all settings are automatically copied from the current one.

Dispatch Board- Fields

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



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

You can hide fields if you do not need all five fields displayed. Uncheck the boxes next to fields that you do not want to be displayed.

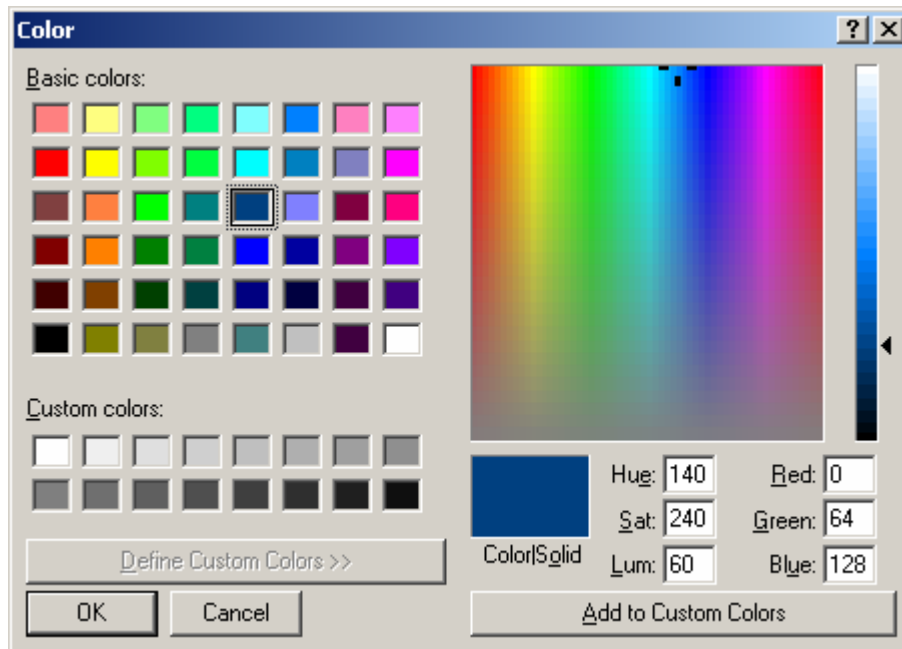
Besides, you can change the display name of selected fields. Click the **Edit** button. An edit box is displayed, where you can type a shorter or more convenient name for the field. (You can even delete the name at all, if you have highlighted the field with color or simply remember which one it is.)

Click the **Default** button to reset the name to the default.

Click **OK** to save the new display name.

To change the color of a field, click its **Color** button.

Select color in the standard Windows **Color** dialog box.



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

In the **Time** section you can enter the **Open Time** and **Close Time** and specify the Time Interval of tasks/dispatches. When no time interval is selected (**None** is selected in the **Interval** field), Open Time and Close Time fields will be disabled (tasks on the board will be shown only by Dates).

On the **Filters** tab, you may request to see only those task/dispatches meeting certain criteria.

Click the **Technician Number** line to set a range of technicians (or just one technician),

Options for User - 'IIG'

Options Type: 000 Description: Standard

Filters Fields View Maps

Field Name All Starting Ending

Technician Number ADAM WILL

Fields	Starting	Ending
<input checked="" type="checkbox"/> Date	01/01/1900	12/31/2099
<input checked="" type="checkbox"/> Technician Number		////
<input checked="" type="checkbox"/> Task Number		////////
<input checked="" type="checkbox"/> Division - Customer Number	00-	99-////////
<input checked="" type="checkbox"/> Task Status		Z
<input checked="" type="checkbox"/> Task Type		Z
<input checked="" type="checkbox"/> Task Priority		Z
<input checked="" type="checkbox"/> Skip To Code		////

Show Unchecked Lines Only

Ok Cancel

IIG SMD 06/06/2011

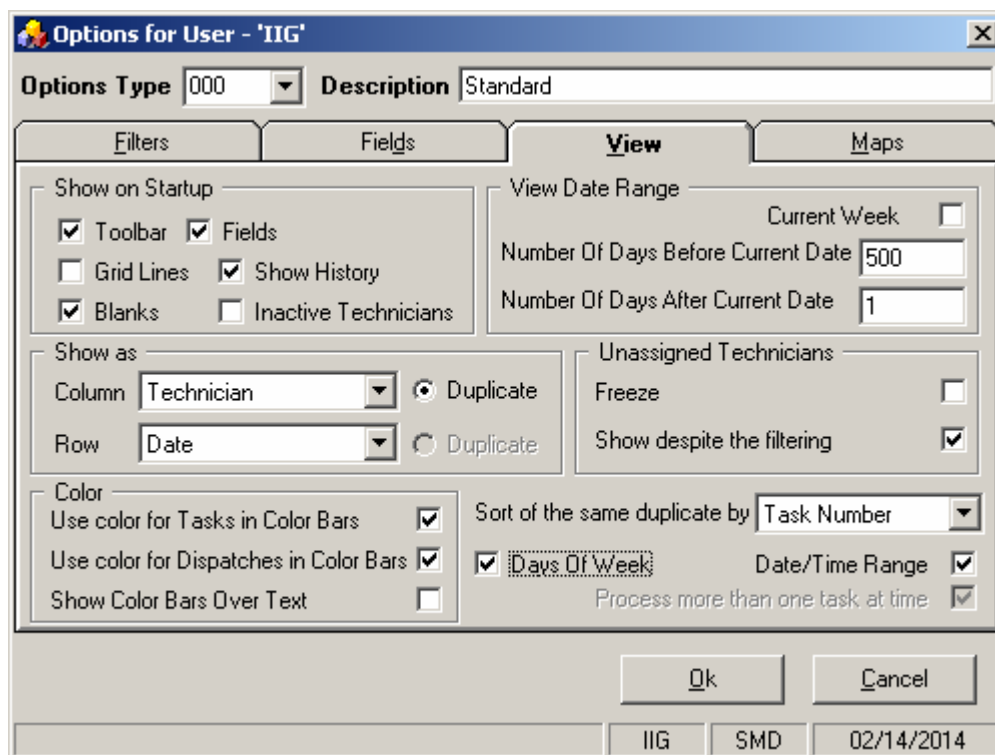
Enter the Starting and Ending **Technician Numbers** and click the **Save Change** icon to the right.

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

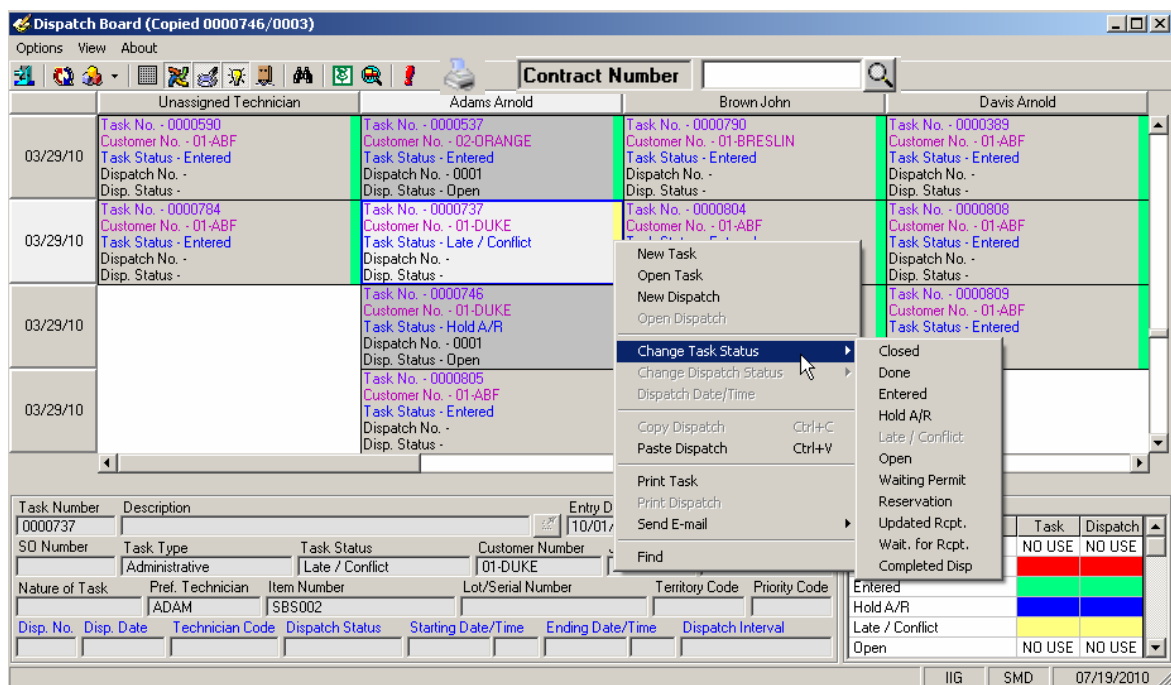
to see duplicated columns or rows (in case the same tasks are assigned to the same technician and should be done on the same period of time).

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.



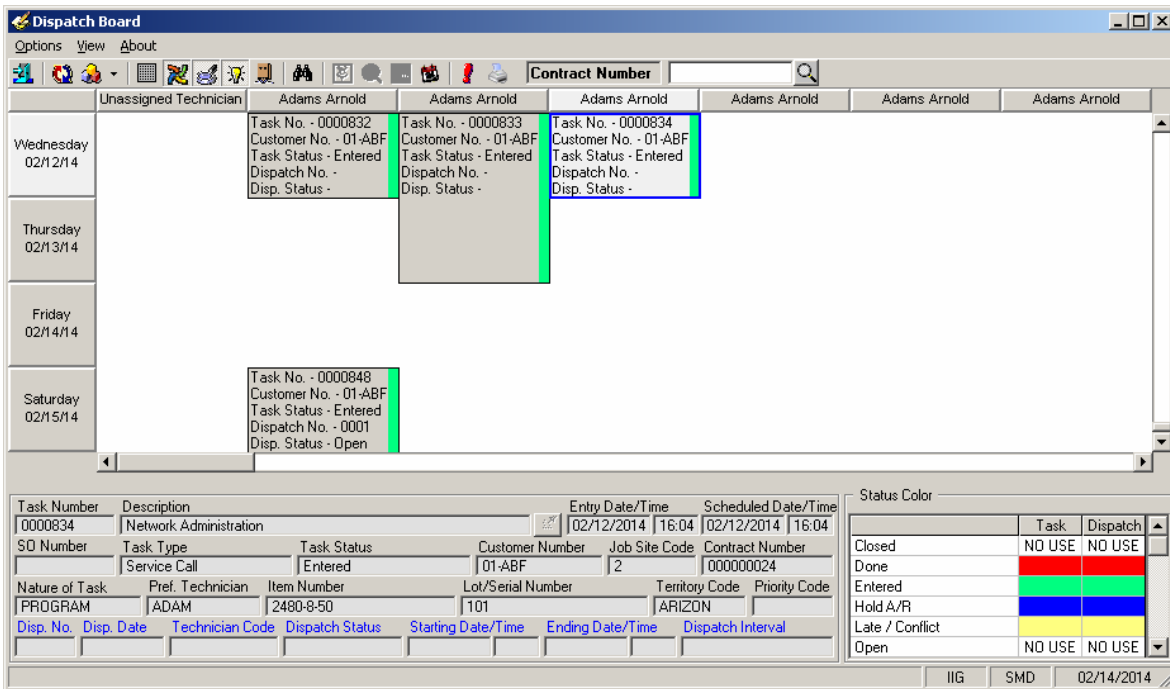
Changing the status of the task/dispatch will change also the colors.

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.

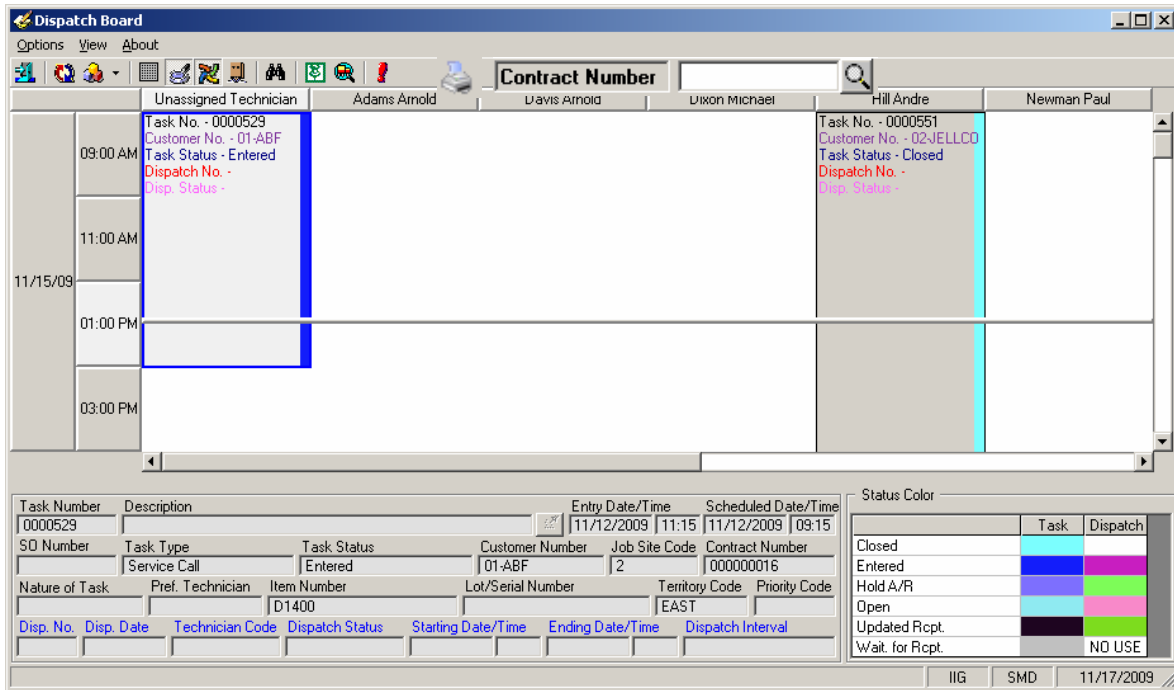
In the **Sort of the same duplicate by** field select the field (Task Number, Priority Code, Scheduled or Start Time, Scheduled Time, Dispatch Start Time) based on which sorting within the same duplicates (for instance, Technicians or Dates) should be done. But in

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.

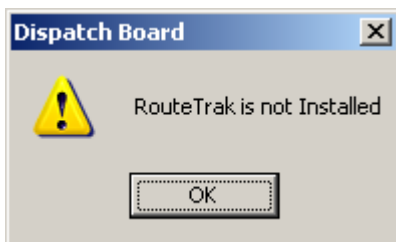
By default, the displayed fields, names, ranges and colors are saved for each user and each company separately under Options Type 000 Standard. You can create different views. Enter new **Options Type** and **Description**. Make your changes, and click **OK**. The view will be saved under current Options 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

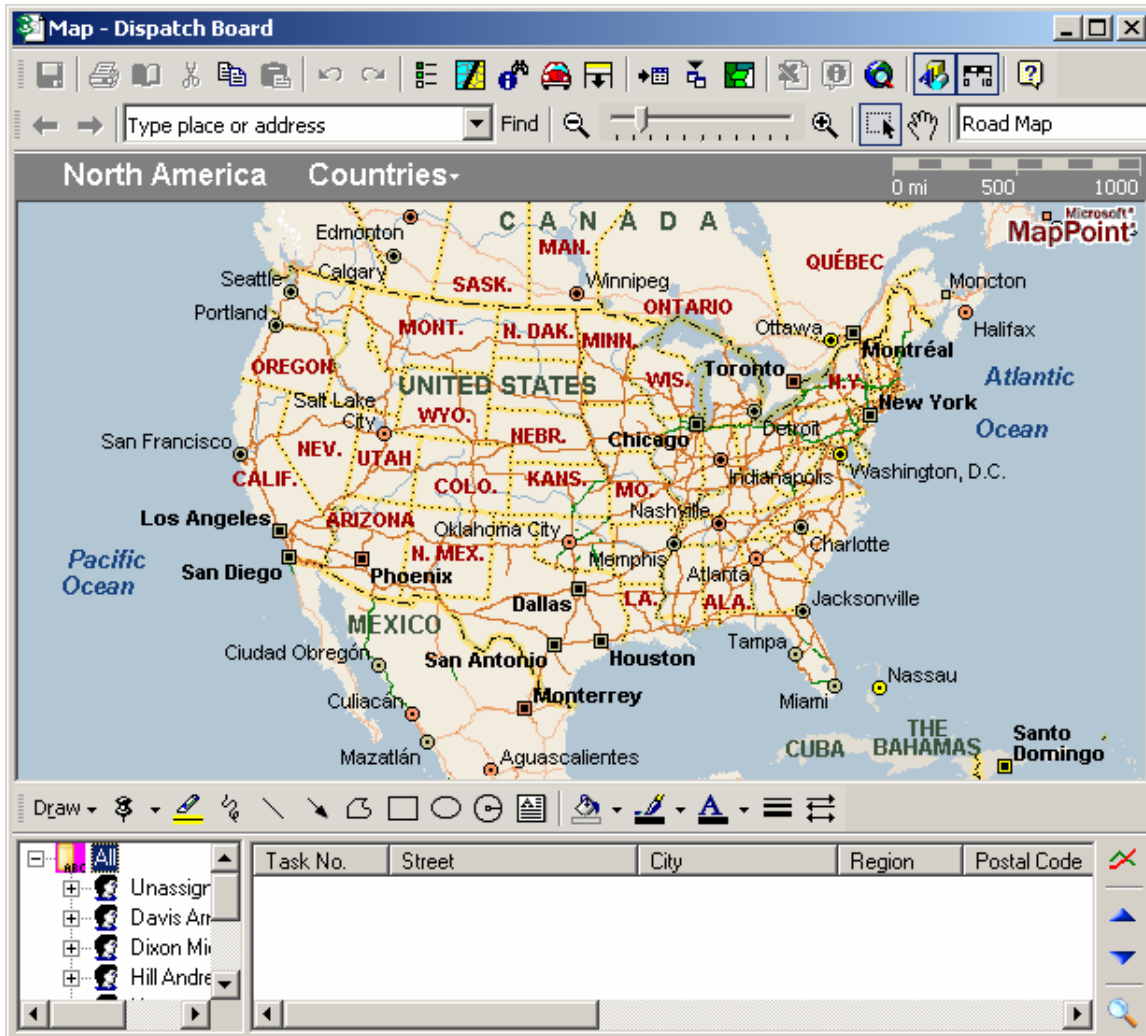
Note: In order to enable the Map Point button on the toolbar program, it is necessary to have IIG's SMM4.50 (Map Point for SMP) enhancement installed and enabled in the Dispatch Board Options.

It is necessary also to have the RouteTrack program installed, since vehicle and truck information set for each technician is taken from RouteTrack program database.

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



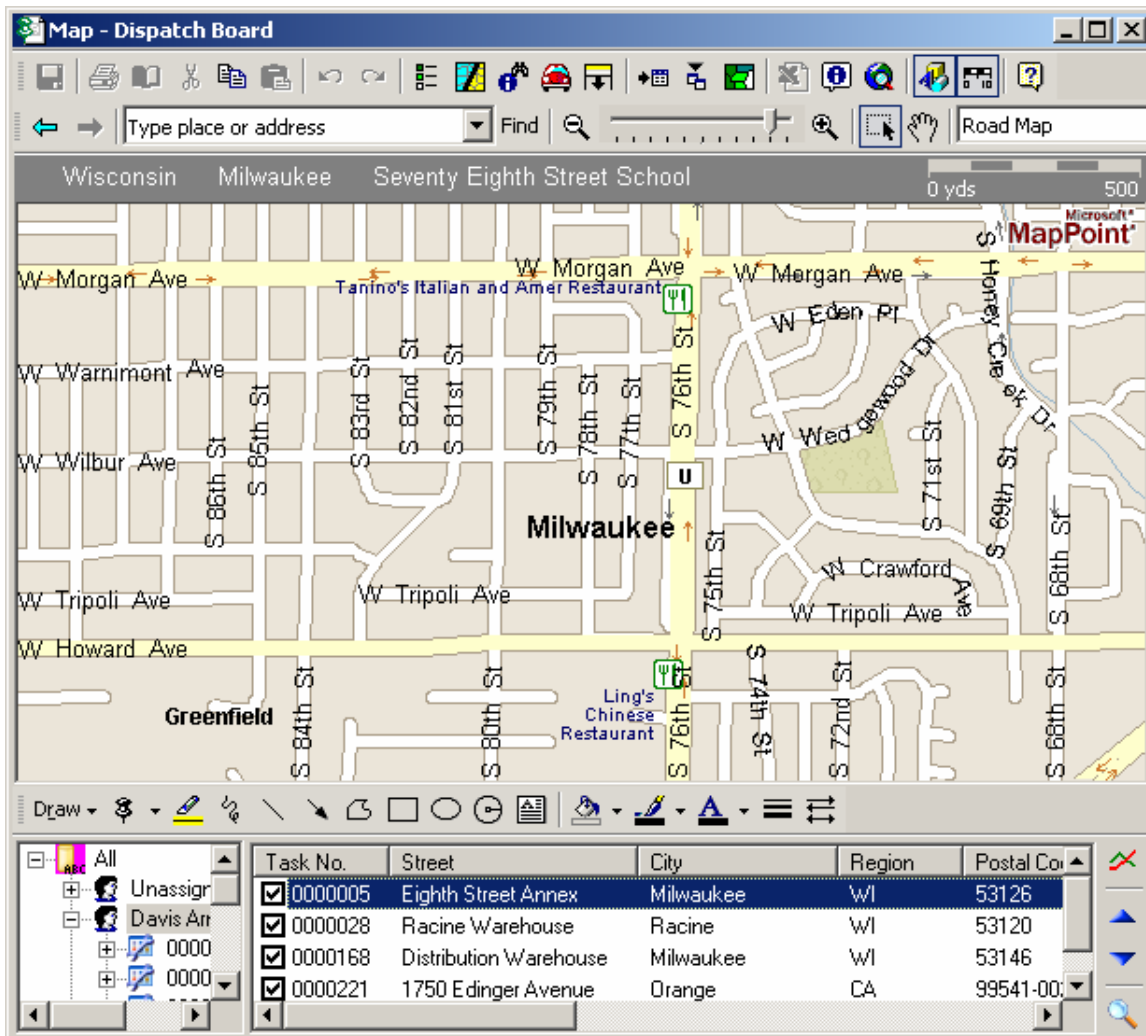
In the opened **Map-Dispatch Board**, at the bottom of the window, the tree-control on the left lists the **Technicians** displayed in the Board.



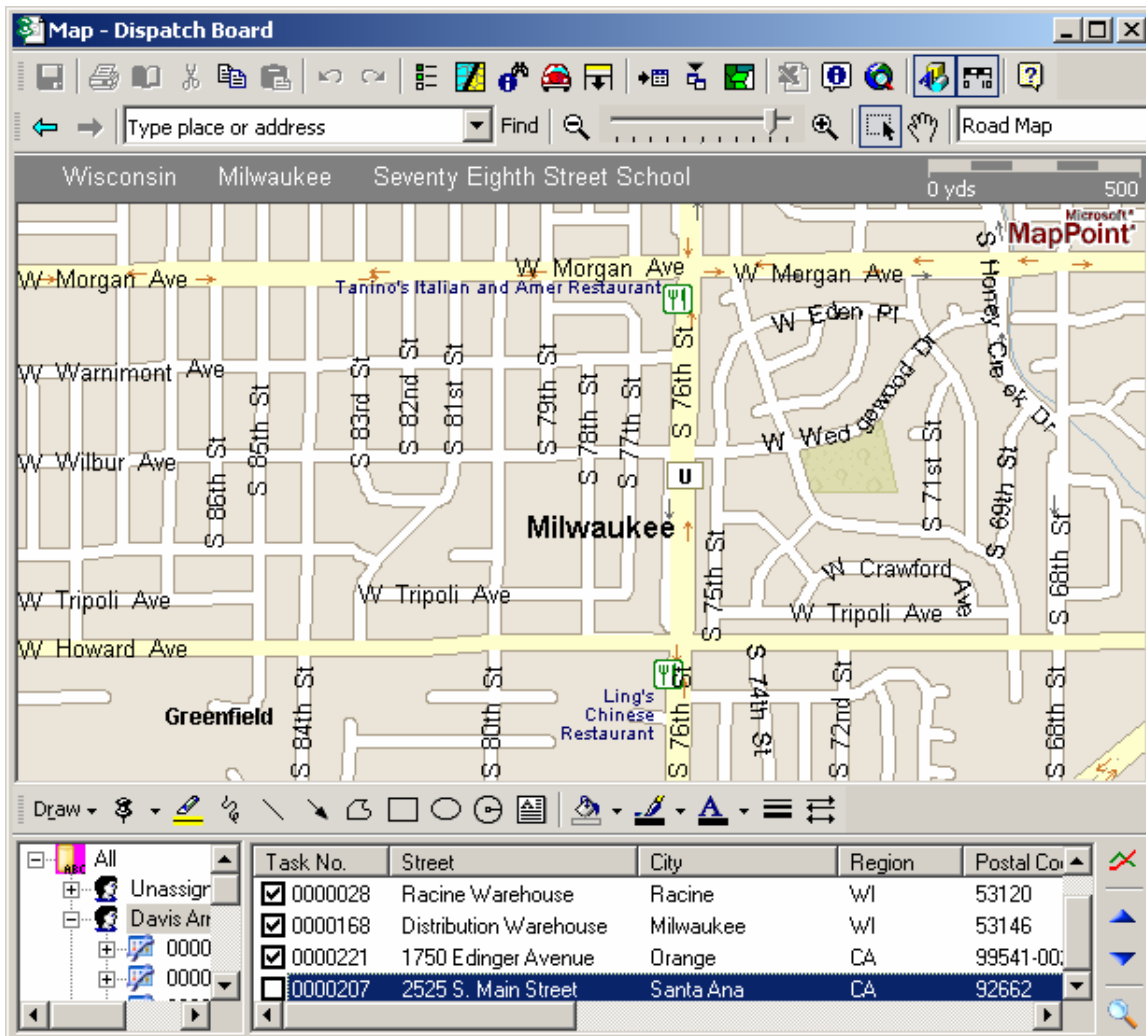
When clicking a **Technician**, Tasks assigned to that technician are displayed on the right (as it is on the Board):



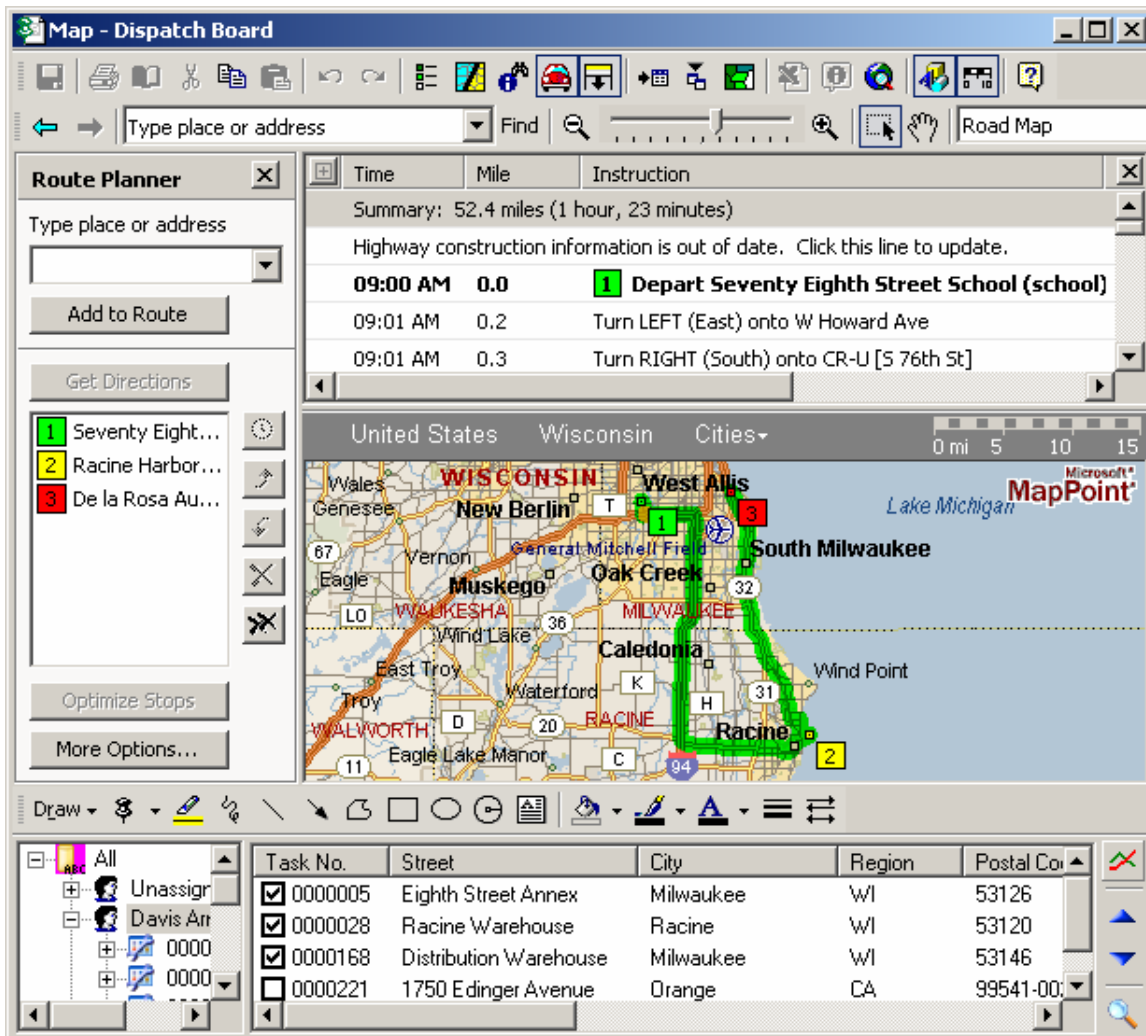
When selecting a task from the list, City map of the region is displayed.



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



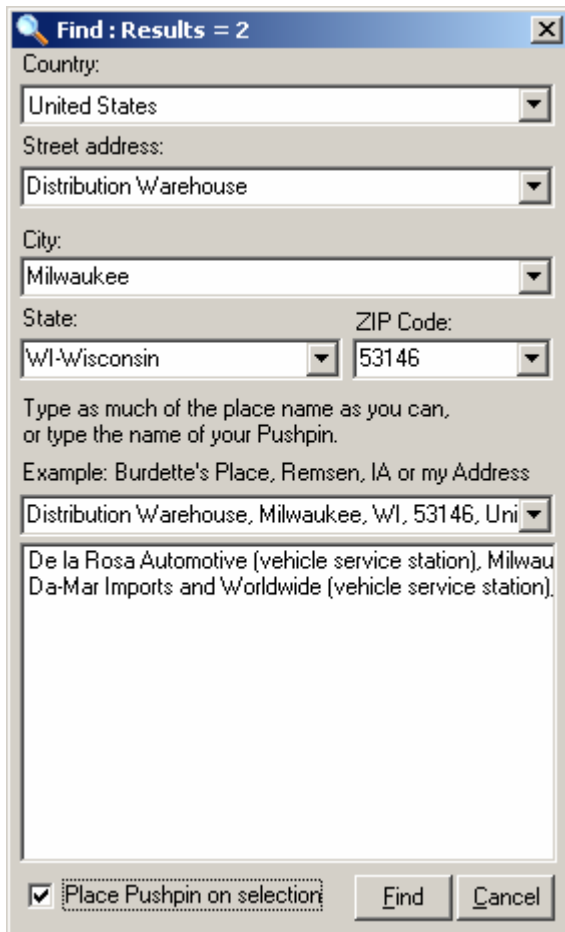
The **Calculate** button can be used for route calculation.



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:



The screenshot shows a window titled "Find : Results = 2". It contains several dropdown menus for search criteria: Country (United States), Street address (Distribution Warehouse), City (Milwaukee), State (WI-Wisconsin), and ZIP Code (53146). Below these is a text input field with the example text "Type as much of the place name as you can, or type the name of your Pushpin. Example: Burdette's Place, Remsen, IA or my Address". The input field contains "Distribution Warehouse, Milwaukee, WI, 53146, Uni". Below the input field is a list of search results: "De la Rosa Automotive (vehicle service station), Milwau" and "Da-Mar Imports and Worldwide (vehicle service station)". At the bottom, there is a checkbox labeled "Place Pushpin on selection" which is checked, and two buttons labeled "Find" and "Cancel".

This window is always on-top.

If a **Task** is selected in the **Map** window, the address is automatically loaded in the **Find** window.

The **Place Pushpin on selection** box can be checked to place a Pushpin for the selected place.

Map - Dispatch Board

Type place or address Find Road Map

Legend and Overview

- WISCONSIN
- Glendale
- New Berlin
- West Allis
- Franklin
- Caledonia

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 [5 76th St]

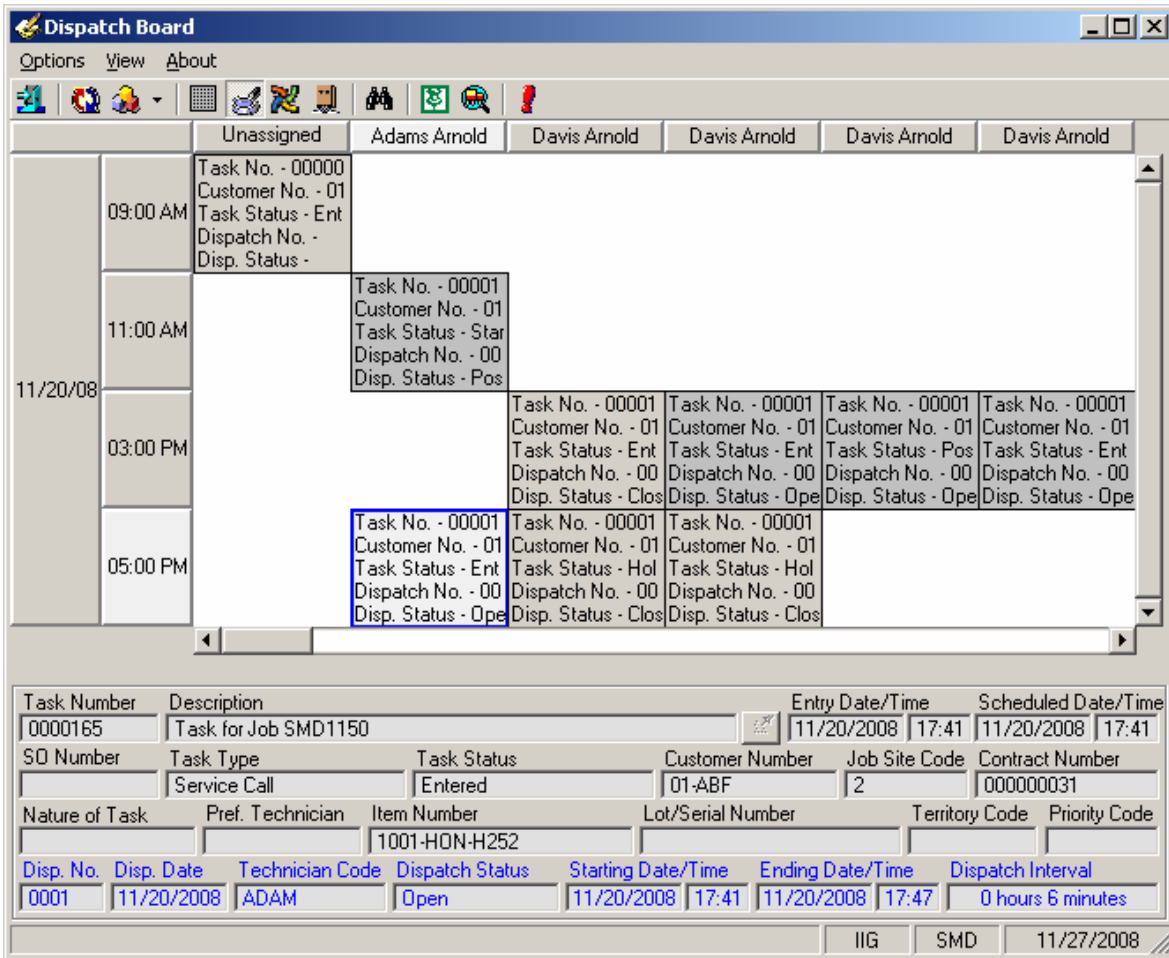
Milwaukee Da-Mar Imports and Worldwide 0 mi 1 2

Da-Mar Imports and World...
This is the address you selected!

MapPoint

Draw

Task No.	Street	City	Region	Postal Code
<input checked="" type="checkbox"/>	0000005	Eighth Street Annex	Milwaukee	WI 53126
<input checked="" type="checkbox"/>	0000168	Distribution Warehouse	Milwaukee	WI 53146
<input checked="" type="checkbox"/>	0000028	Racine Warehouse	Racine	WI 53120
<input type="checkbox"/>	0000221	1750 Edinger Avenue	Orange	CA 99541-00



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

Auto Generate Invoice Selection

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

Auto Generate Invoice Selection (SMD) 5/6/2015

Bill Freq Code Include Tasks Without Contract Batch

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input type="checkbox"/>
Fixed Percent Complete	<input checked="" type="checkbox"/>
Fixed On Going	<input checked="" type="checkbox"/>

Select Field	Operand	Value
Customer Number	All	
Contract No.	All	
Task No	All	
Dispatch Date	All	
Dispatch Status	All	

Contract Number	Task Number	Dispatch No	Customer Number	Include	Dispatch

Include Grouped By Contract

You can choose to process all the customers and tasks or only the selected ones. Also you can select dispatches by date and status and by Bill Frequency Code of the Task.

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.

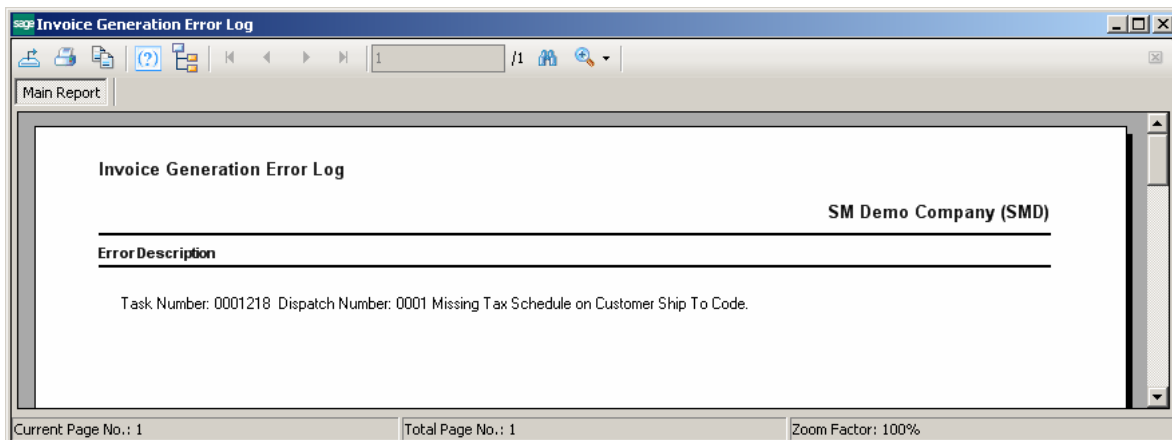
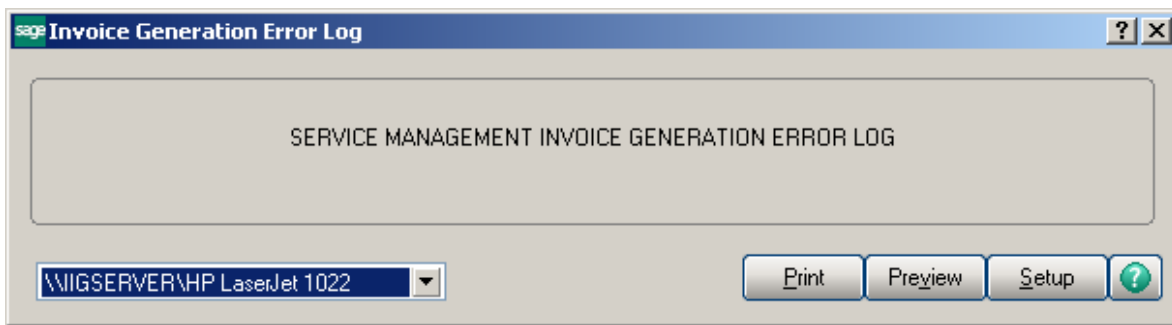
To start generating invoices, click the **Generation** button.

If the **Separate Invoice** flag is set on the Tasks separate invoices will be generated for each task during Auto Invoice Generation.

If the Separate Invoice flag is not set on the Tasks included in the Invoice generation, a single Invoice will be generated for all Tasks of the same Contract.

Separate invoice will be generated for the Tasks, irrespective of the Separate Invoice option if the Default Payment Type is not set to None on the Task Header.

If for some reason the program is not able to generate Invoice(s) for the selected dispatches, an error log is printed and the Dispatch remains open.



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

SAP Auto Close Tasks Selection (SMD) 10/1/2014

Select Field	Operand	Value
Customer Number	All	
Task No	All	
Task Type	All	
Task Status	All	

	Task No.	Task Description	Customer Number	Task Status	Contract No.	Include
1	0001219	[User:ig9/30/2014 02:32:4	02-ALLENAP	Entered	000000001	<input type="checkbox"/>
2	0001220	Implementation	02-ALLENAP	Entered	000000001	<input type="checkbox"/>
3	0001221	Implementation	02-ALLENAP	Entered	000000001	<input type="checkbox"/>
4	0001222	Get electrical	01-ABF	Entered		<input type="checkbox"/>
5	0001223	Cabinet Work / holes	01-ABF	Entered		<input type="checkbox"/>
6	0001225	Get electrical	01-ABF	Entered		<input type="checkbox"/>

Clear Proceed Cancel Close

Multi Contract Invoice Generation

There is also an option of generating multi contract Invoices for each processed task having several dispatches with different contracts assigned.

Auto Generate Invoice Selection (SMD) 10/2/2014

Bill Freq Code Include Tasks Without Contract Batch 00045

Select Field	Operand	Value
Customer Number	All	
Task No	Equal to	0001234
Dispatch Date	All	
Dispatch Status	All	

Task Number	Dispatch No	Contract Number	Customer Number	Include	Dispatch

Clear Proceed Cancel Generation

The Contract Number shown on the generation screen is the Contract of the Task Header and not the Contract of the Dispatch:

Here is an example of Multi contract Invoice generated for a Task having 2 dispatches with different Contract numbers:

SAP Auto Generate Invoice Selection (SMD) 5/6/2015

Bill Freq Code Include Tasks Without Contract Batch 00032

Contract Billing Type	Include
Time And Material	<input checked="" type="checkbox"/>
Fixed Upon Complete	<input checked="" type="checkbox"/>
Fixed Percent Complete	<input checked="" type="checkbox"/>
Fixed On Going	<input checked="" type="checkbox"/>

Select Field	Operand	Value
Customer Number	All	
Contract No.	All	
Task No	All	
Dispatch Date	All	
Dispatch Status	All	

	Contract Number	Task Number	Dispatch No	ustomer Numbr	Include	Dispatch Date	Dispa
1	000000196	0001000	0001	01-ABF	<input checked="" type="checkbox"/>	5/6/2015	0
2	000000196	0001000	0002	01-ABF	<input checked="" type="checkbox"/>	5/6/2015	0

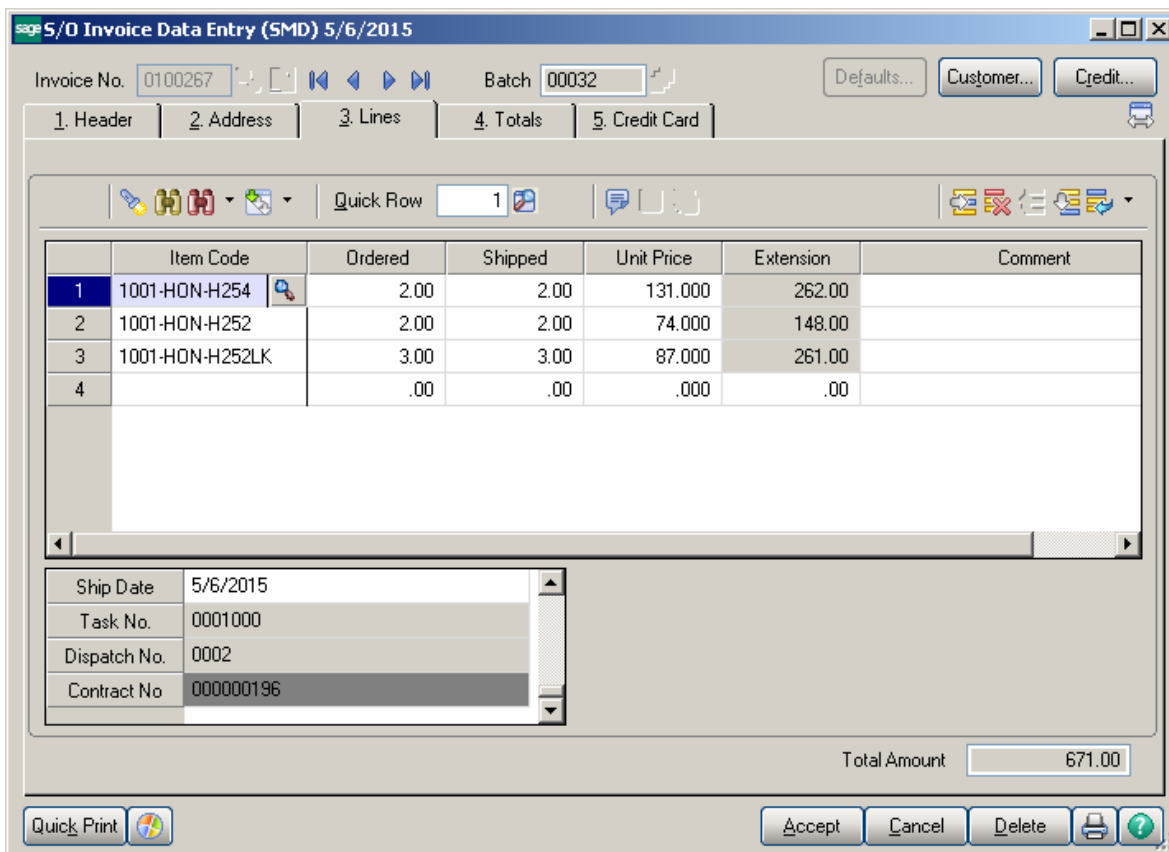
Clear Include Grouped By Contract Proceed Cancel Generation

Here is the Multi Contract Invoice generated for the selected Task. The **Multi Contract** checkbox added on the Header tab of the Invoice Data Entry is automatically checked indicating the Invoice contains lines for different Contracts.

The screenshot shows the SAP S/O Invoice Data Entry (SMD) window for 5/6/2015. The window title is "SAP S/O Invoice Data Entry (SMD) 5/6/2015". The main area is divided into several sections:

- Header Section:** Invoice No. 0100267, Batch 00032. Navigation buttons: Defaults..., Customer..., Credit....
- Navigation Tabs:** 1. Header, 2. Address, 3. Lines, 4. Totals, 5. Credit Card.
- Invoice Information:** Invoice Date 5/6/2015, Invoice Type Standard Invoice, Sales Order Number (blank).
- Customer Information:** Customer No. 01-ABF (American Business Futures), Contract No. (blank), Multi Contract (highlighted with a blue box), Cust PO (blank).
- Order Status:** 1 Step.
- Shipping Information:** Ship Date 5/6/2015, Due Date 6/5/2015, Discount Date 5/6/2015, Warehouse 001 (EAST WAREHOUSE).
- Apply to Inv #:** (blank).
- Shipping Details:** 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. (blank), Comment (blank).
- Sales Tax:** Schedule WI (Wisconsin).
- Salesperson:** 0100 (Jim Kentley), Split Comm. No.
- Buttons:** Print Invoice , Tracking..., Split Comm..., Quick Print, Accept, Cancel, Delete, Print, Help.

For Multi Contract invoices the Contract number field on the Invoice Header is blank and disabled.



The Contract number field added to the lines grid displays the Contract number specified on the Dispatch header.

The Contract number field added to the **A/R Invoice History** lines grid is populated when the multi contract invoice is updated.

The **Invoice History Printing** program allows for printing the Contract number for the Invoice lines.

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.

Select Field	Operand	Value
Customer Number	All	
Technician Code	All	
Task No	All	
Task Type	All	
Task Status	All	
Dispatch Status	All	
Dispatch Date	All	

Task Number	Dispatch No	Customer Number	Task Type	Task Status	Dispatch Status	Include	Cus

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.

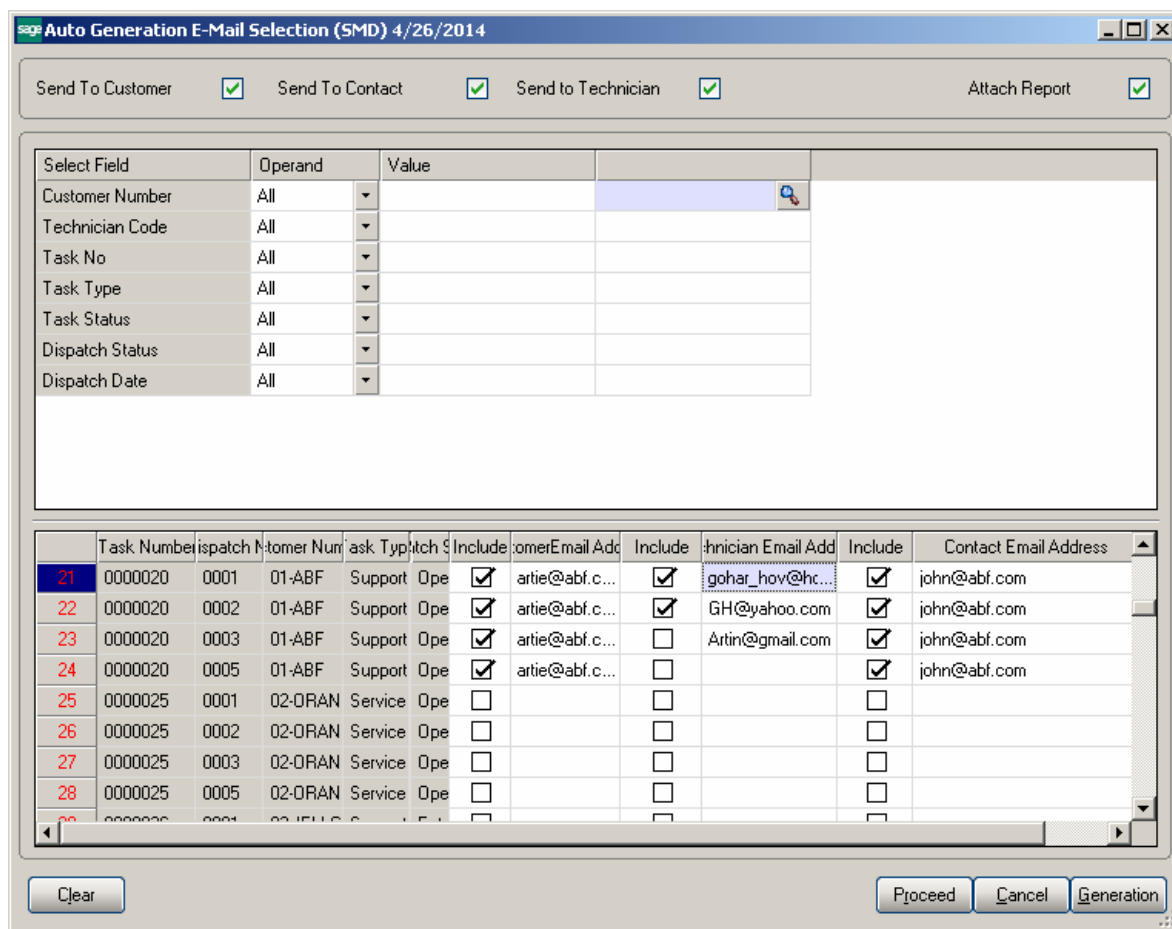
Click the **Clear** button, if you want to remove dispatches from the list according to the selections.

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.



Emails will be sent to the addresses entered in the grid.

Auto Close Task Selection

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

The screenshot shows the 'Auto Close Tasks Selection (SMD) 10/2/2014' window. It features a filter table at the top and a main task list table below it.

Select Field	Operand	Value
Customer Number	All	
Task No	All	
Task Type	All	
Task Status	All	

	Task No.	Task Description	Customer Number	Task Status	Contract No.	Include
1	0001219	[Useriig9/30/2014 02:32:4	02-ALLENAP	Entered	000000001	<input type="checkbox"/>
2	0001220	Implementation	02-ALLENAP	Entered	000000001	<input type="checkbox"/>
3	0001221	Implementation	02-ALLENAP	Entered	000000001	<input type="checkbox"/>
4	0001222	Get electrical	01-ABF	Entered		<input type="checkbox"/>
5	0001223	Cabinet Work / holes	01-ABF	Entered		<input type="checkbox"/>
6	0001225	Get electrical	01-ABF	Entered		<input type="checkbox"/>
7	0001227	[Useriig10/1/2014 11:42:0	01-ABF	Entered	01ABF	<input type="checkbox"/>
8	0001228	[Useriig10/1/2014 11:41:5	01-ABF	Entered	01ABF	<input type="checkbox"/>
9	0001230	Get electrical	01-ABF	Entered		<input type="checkbox"/>

At the bottom of the window, there are four buttons: 'Clear', 'Proceed', 'Cancel', and 'Close'.

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

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.

Select Field	Operand	Value
Customer Number	All	
Contract No	All	

Contract No.	Customer No.	Freq Code	Amount From	Document	Total Amount

You can choose to process all the customers and contracts or 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.

Auto Generate Contract Sales Documents (SMD) 5/6/2015

Bill Freq Code Control Date for Renewal

Select Field	Operand	Value
Customer Number	All	
Contract No	All	

	Contract No.	Customer No.	req Cod	Amount From	Document	Total Amount	Include
1	000000001	02-ALLENAP		Items	Invoice	280.00	<input checked="" type="checkbox"/>
2	000000006	02-ORANGE		Items	Invoice	340.00	<input checked="" type="checkbox"/>
3	000000008	01-RSSUPPL		Header	Invoice	1,500.00	<input checked="" type="checkbox"/>
4	000000009	02-CAPRI		Header	Invoice	65,000.00	<input checked="" type="checkbox"/>
5	000000010	02-JELCO		Items	Invoice	770.00	<input checked="" type="checkbox"/>
6	000000011	02-ORANGE		Header	Standard Or	1,200.00	<input checked="" type="checkbox"/>
7	000000012	02-JELCO		Items	Invoice	530.00	<input checked="" type="checkbox"/>

Clear Proceed Cancel Generation

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

Payroll Batch Entry

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

Employee No.	Employee Name	Earnings	Earnings Desc.	Reported Hours	Updated Hours	Difference	Changed	Overtime	Overtime Hours
--------------	---------------	----------	----------------	----------------	---------------	------------	---------	----------	----------------

To create new batch, enter **Starting** and **Ending** Dates or use calendar clicking the **Calendar** buttons. When selecting the **Starting** date, the **Ending** date is automatically calculated by adding a week to the **Starting** date. The **Ending** date can be changed after that, if needed. When the screen is opened first, the dates are set to define the last week, that is, the **Ending** date is set to a day before the current system date, and the **Starting** date is calculated respectively.

Click the **Proceed** button.

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

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

Check the **Include History** box to search for labor lines of current period in history too. By default this setting will be the same as the **Include History in Payroll Batch** in the **Service Management Options** screen, and can be changed for the current batch.

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

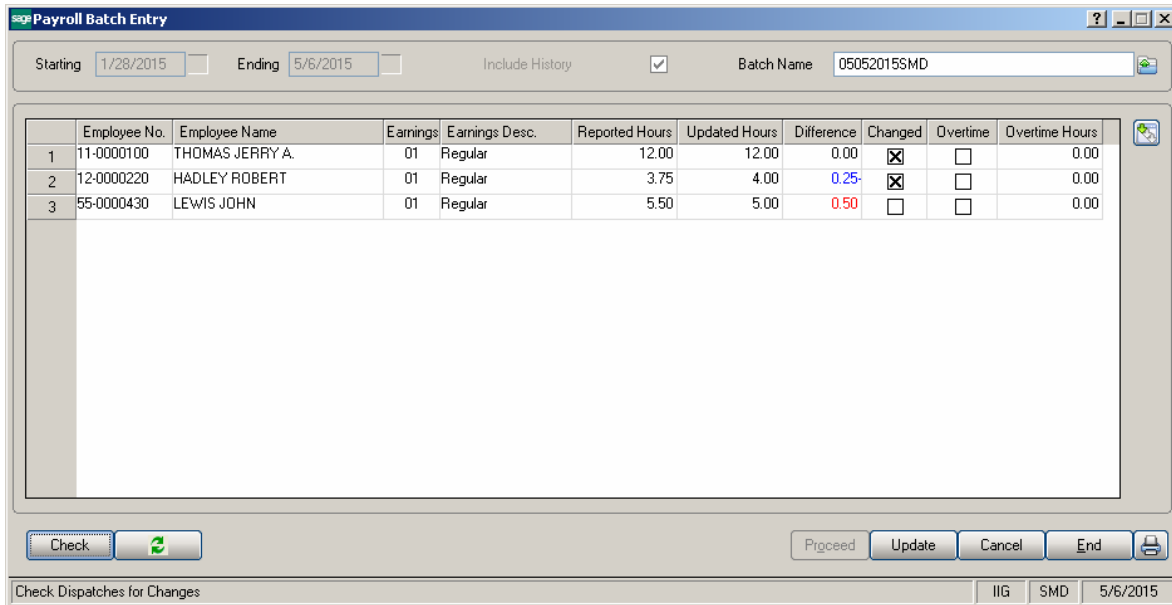
The **Updated Hours** field displays the information from the Labors for the dispatches and cannot be changed. When trying to change or delete a Labor line already included in a Payroll Batch, from the Dispatch Data Entry program, a warning message is displayed to confirm the change.

The **Reported Hours** fields in the list can be modified. If the batch is already saved, it can be opened for reviewing and modifying the entered Reported Hours.

Difference Hours fields display differences between **Reported** and **Updated** Hours. Difference is displayed in blue if it is negative and in red if it is positive.

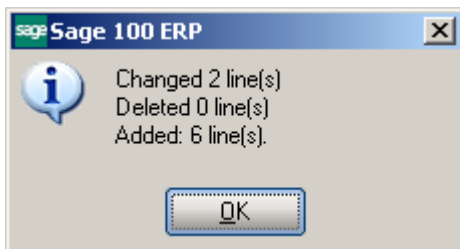
	Employee No.	Employee Name	Earnings	Earnings Desc.	Reported Hours	Updated Hours	Difference	Changed	Overtime	Overtime Hours
1	11-0000100	THOMAS JERRY A.	01	Regular	12.00	12.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	0.00
2	12-0000220	HADLEY ROBERT	01	Regular	3.75	4.00	0.25	<input type="checkbox"/>	<input type="checkbox"/>	0.00
3	55-0000430	LEWIS JOHN	01	Regular	5.50	5.00	0.50	<input type="checkbox"/>	<input type="checkbox"/>	0.00

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.

sage Payroll Batch Entry

Starting: 1/28/2015 Ending: 5/6/2015 Include History: Batch Name: 05052015SMD

	Employee No.	Employee Name	Earnings	Earnings Desc.	Reported Hours	Updated Hours	Difference	Changed	Overtime	Overtime Hours
1	11-0000100	THOMAS JERRY A.	01	Regular	25.00	25.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	13.00
2	11-0000100	THOMAS JERRY A.	02	Overtime	6.81	6.81	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00
3	11-0000100	THOMAS JERRY A.	03	Doubletime	6.19	6.19	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00
4	12-0000220	HADLEY ROBERT	01	Regular	16.00	16.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	6.00
5	12-0000220	HADLEY ROBERT	02	Overtime	5.14	5.14	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00
6	12-0000220	HADLEY ROBERT	03	Doubletime	0.86	0.86	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00
7	55-0000430	LEWIS JOHN	01	Regular	5.00	5.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	0.00

Buttons: Check, Proceed, Update, Cancel, End

Status: IIG SMD 5/6/2015

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.

sage Employee Drill Down

Employee No. 11-0000100 THOMAS JERRY A. Updated Hours 25.00
 Earn CD 01 Regular Overtime Hours 13.00

Task-Disp. No	Date	Labor	Hours	Status
0000190-0001	03/24/2015	0002190	9.00	Open
0000190-0001	03/24/2015	INSTALL	6.83	Open
0000190-0002	03/24/2015	BUILD	2.00	Open
0000190-0001	03/24/2015	INSTALL	3.17	Open
0000957-0001	03/26/2015	INSTALL	8.00	Open
0000969-0001	04/29/2015	INSTALL	1.00	Closed (in hist.)
0000969-0002	05/06/2015	INSTALL	5.00	Closed (in hist.)
0000969-0002	05/06/2015	INSTALL	3.00	Closed (in hist.)

Buttons: OK, Print

Status: IIG SMD 5/11/2015

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

TASK-DISPATCH No.	DATE	LABOR	HOURS	STATUS
0000190-0001	03/24/2015	0002190	9.00	Open
0000190-0001	03/24/2015	INSTALL	6.83	Open
0000190-0002	03/24/2015	BUILD	2.00	Open
0000957-0001	03/26/2015	INSTALL	8.00	Open
0000969-0001	04/29/2015	INSTALL	1.00	Closed (in hist.)
0000969-0002	05/06/2015	INSTALL	5.00	Closed (in hist.)
0000190-0001	03/24/2015	INSTALL	3.17	Open
0000969-0002	05/06/2015	INSTALL	3.00	Closed (in hist.)
			REGULAR:	25.00
			OVERTIME:	13.00
			REPORTED HOURS:	25.00
			NOT TURNED IN:	0.00

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

When printing the Payroll Batch a prompt appears about printing all the lines or only those with non-zero Difference Hours:



Here is an example of printout:

Payroll Batch Printing

SM Demo Company

PAYROLL BATCH PRINTING

BATCH NAME:05052015smd (All Records)

EMPLOYEE No.	EARN CD	HRS. REP.	HRS. UPD.	NOT TURNED IN	OVERTIME																																																		
11-0000100 THOMAS JERRY A.	01 Regular	25.00	25.00	0.00	13.00																																																		
<table border="1"> <thead> <tr> <th>TASK-DISPATCH No.</th> <th>DATE</th> <th>LABOR</th> <th>HOURS</th> <th>STATUS</th> </tr> </thead> <tbody> <tr> <td>0000190-0001</td> <td>03/24/2015</td> <td>0002190</td> <td>9.00</td> <td>Open</td> </tr> <tr> <td>0000190-0001</td> <td>03/24/2015</td> <td>INSTALL</td> <td>6.83</td> <td>Open</td> </tr> <tr> <td>0000190-0002</td> <td>03/24/2015</td> <td>BUILD</td> <td>2.00</td> <td>Open</td> </tr> <tr> <td>0000957-0001</td> <td>03/26/2015</td> <td>INSTALL</td> <td>8.00</td> <td>Open</td> </tr> <tr> <td>0000969-0001</td> <td>04/29/2015</td> <td>INSTALL</td> <td>1.00</td> <td>Closed (in hist.)</td> </tr> <tr> <td>0000969-0002</td> <td>05/06/2015</td> <td>INSTALL</td> <td>5.00</td> <td>Closed (in hist.)</td> </tr> <tr> <td>0000190-0001</td> <td>03/24/2015</td> <td>INSTALL</td> <td>3.17</td> <td>Open</td> </tr> <tr> <td>0000969-0002</td> <td>05/06/2015</td> <td>INSTALL</td> <td>3.00</td> <td>Closed (in hist.)</td> </tr> <tr> <td colspan="3"></td> <td>38.00</td> <td></td> </tr> </tbody> </table>						TASK-DISPATCH No.	DATE	LABOR	HOURS	STATUS	0000190-0001	03/24/2015	0002190	9.00	Open	0000190-0001	03/24/2015	INSTALL	6.83	Open	0000190-0002	03/24/2015	BUILD	2.00	Open	0000957-0001	03/26/2015	INSTALL	8.00	Open	0000969-0001	04/29/2015	INSTALL	1.00	Closed (in hist.)	0000969-0002	05/06/2015	INSTALL	5.00	Closed (in hist.)	0000190-0001	03/24/2015	INSTALL	3.17	Open	0000969-0002	05/06/2015	INSTALL	3.00	Closed (in hist.)				38.00	
TASK-DISPATCH No.	DATE	LABOR	HOURS	STATUS																																																			
0000190-0001	03/24/2015	0002190	9.00	Open																																																			
0000190-0001	03/24/2015	INSTALL	6.83	Open																																																			
0000190-0002	03/24/2015	BUILD	2.00	Open																																																			
0000957-0001	03/26/2015	INSTALL	8.00	Open																																																			
0000969-0001	04/29/2015	INSTALL	1.00	Closed (in hist.)																																																			
0000969-0002	05/06/2015	INSTALL	5.00	Closed (in hist.)																																																			
0000190-0001	03/24/2015	INSTALL	3.17	Open																																																			
0000969-0002	05/06/2015	INSTALL	3.00	Closed (in hist.)																																																			
			38.00																																																				
11-0000100 THOMAS JERRY A.	02 Overtime	6.81	6.81	0.00	YES																																																		
11-0000100 THOMAS JERRY A.	03 Doubletime	6.19	6.19	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.

Sage Task Data Inquiry (SMD) 6/27/2014

Task No. 0000833 System Installation User useriig

1. Header 2. Address 3. Dispatches

Task Date 3/5/2013 Task Time 12:30 PM Task Type Installation

Customer No. 01-ABF American Business Futures Credit Card...

Task Status 0 Open Salesperson 0200 Shelly Westland

Contract No. 000000024 Shipping Dflt Pynt Type NONE

Job Site Code 2 American Business Futures

Job Site Contact John Quinn Cust PO

Nature of Task PROGRAM Install Program Priority Code

Preferred Tech. ROBI Robinson Christopher Bill Freq Code

Item Number 2480-8-50 DESK FILE 8" CAP 50

Lot/Serial No. 1020 Territory ARIZON Region Arizona

Tax Schedule WI Wisconsin Separate Invoice

Response EMG Emergency Response Schedule Date 3/6/2014 Time 12:52 PM

Coverage HSRV Work hours for services Due Date 3/7/2014 Time 11:52 AM

Quote Amount 1,200.00 Quote Hours .00

Documents Path D:\MAS\MAS500\SMP\MAS90\pdf

Quick Print OK

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

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	10/30/2013	SANT	Santana Juan	Closed
0002	10/30/2013	SANT	Santana Juan	Closed
0003	10/30/2013	SANT	Santana Juan	Closed
0004	10/30/2013	SANT	Santana Juan	Open

Task History Inquiry

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

sage Task History Inquiry (SMD) 6/27/2014

Task No. 0000864

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

Task Date 2/26/2014 Task Time 05:14 PM Task Type S Service Call

Customer No. 01-ABF American Business Futures

Task Status C Closed Salesperson 0100 Jim Kentley

Contract No. 000000026 Routine repairs

Job Site Code 2 American Business Futures Cust PO

Job Site Contact John Quinn Priority Code

Nature of Task Bill Freq Code

Preferred Tech. ADAM Adams Arnold Close Date

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

Lot/Serial No. Territory ARIZON Region Arizona

Tax Schedule CA California Separate Invoice

Response Coverage Quote Amount .00

Schedule Date 2/26/2014 Time 05:14 PM

Due Date 2/26/2014 Time 05:14 PM

Quote Hours .00

Quick Print OK

Contract Inquiry

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

Contract No. 000000003 NTC Preventive Maint - Commercial

Contract Date: 6/25/2012

Customer No. 01-ABF American Business Futures

Contract Type: Fixed Hours
 Contract Status: New
 Start Date: 6/25/2012
 End Date: 6/25/2013
 Billing Type: Fixed Upon Compl.

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

Generation Document: None
 Contract Amount From: Header
 Bill Freq Code:

PM Code:
 Number of Days: 0 Last Task Gen. Date:
 TaskType:
 Nature of Task:
 Total Fixed Hours: 120 Used Hours: 7:00

All Materials Are Covered
 All Labors Are Covered

Contract Items Total Amount .00

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

Contract No. 000000003 NTC Preventive Maint - Commercial

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History

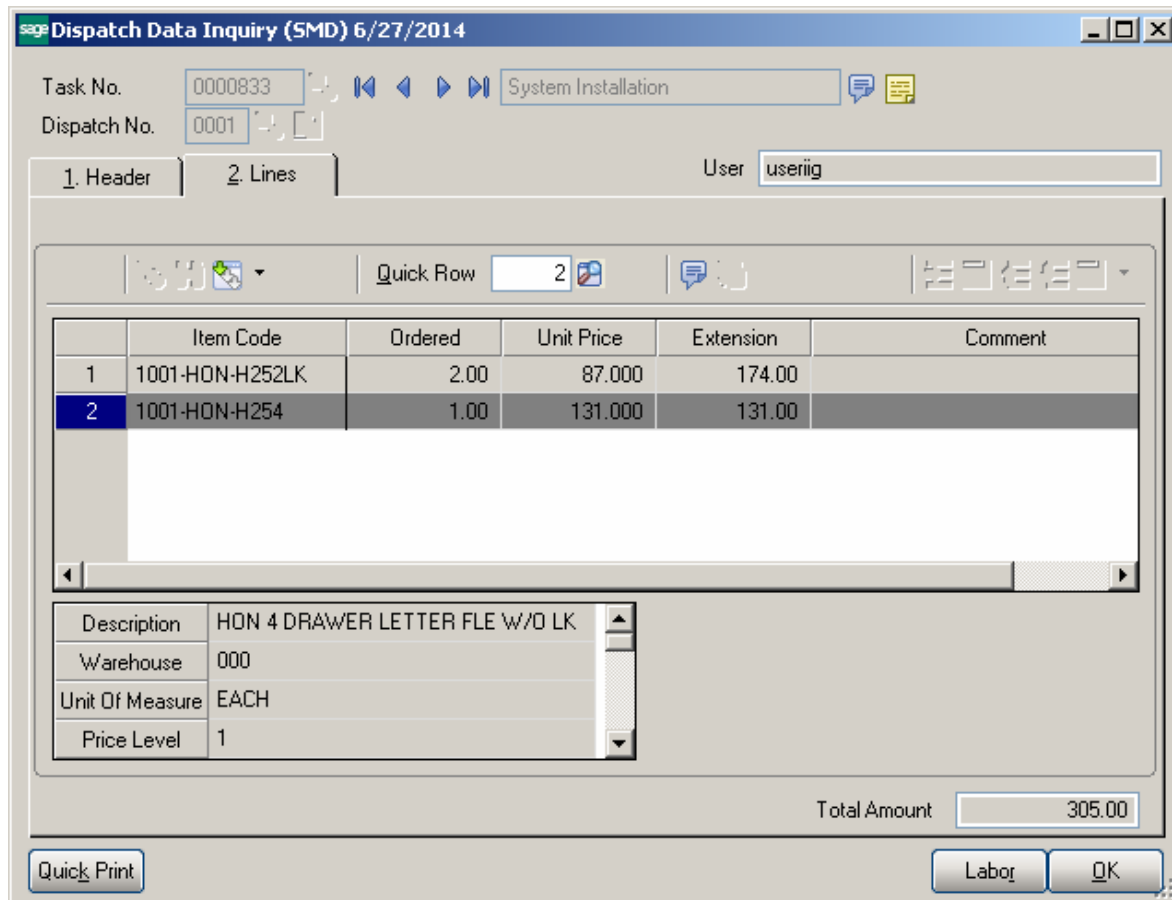
Active History

Task No.▲	Task Status	Nature of Task	Pref Tech.	Active/Hist
0000032	Entered	CALIB	BK	Active
0000051	Entered			Active
0000054	Entered	FILTER		Active
0000055	Entered	FILTER		Active

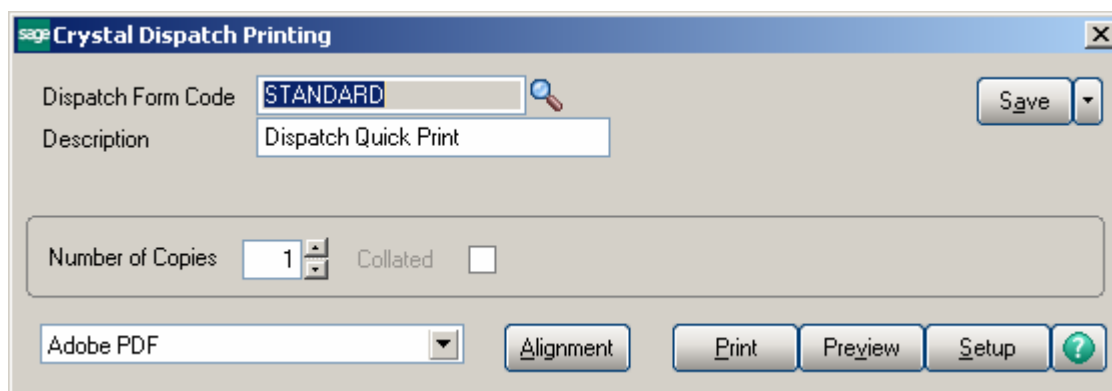
Task Inquiry, Alt-Z

Dispatch Inquiry

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



The **Quick Print** button allows for printing Dispatch report for current dispatch:



Dispatch Printing

Main Report

Dispatch Printing **SM Demo Company (SMD)**

<p>Task Number: 0000833 Task Date: 3/5/2013 Customer Number: 01-ABF</p> <p>American Business Futures Racine Warehouse 5411 Kendrick Place Racine, WI 53120</p>	<p>Preferred Tech: Robinson Christopher Task type: I Nature of Task: PROGRAM Task Status: O Task Priority: Contract Number: 000000024</p> <p>American Business Futures 2131 N. 14th Street Suite 100 Accounting Department Milwaukee, WI 53205-1204</p>
--	--

Task Description: System Installation

Dispatch No.	Dispatch Date	Dispatch Tech.				
0001	6/27/2014	Robinson Christopher				
1001-HON-H252LK	HON 2 DRAWER LETTER FLE W / LCK		2.00	87.000	0.000	174.00
1001-HON-H254	HON 4 DRAWER LETTER FLE W / O LK		1.00	131.000	0.000	131.00
0002200	Replaced		2.00	35.000	0.000	70.00
Dispatch Total :						375.00
Taxable Amount :						305.00
Nontaxable Amount :						70.00
Document Total :						397.11

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

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.

Task Dispatch Report (SMD) 3/21/2013

Report Setting: STANDARD

Description: Task Dispatch Report

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Selections:

Select Field	Operand	Value
Customer Number	All	
Contract No.	All	
Task No.	All	
Task Date	All	
Task Technician	All	
Task Type	All	
Task Status	All	
Nature Of Task	All	
Dispatch No.	All	
Dispatch Starting Date	All	
Dispatch Technician	All	
Dispatch Status	All	
Line Technician	All	
Labor Code	All	

Adobe PDF

Keep Window Open After

Print Preview

Print Preview Setup

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

View Task Dispatch Report

Task Dispatch Report SM Demo Company (SMD)

Task No.	0000032	System Inspection	BELCO 50+			
Contract No.:	000000003	Task Technician	BK	Kingman Bob		
Dispatch No.	0001	Dispatch Date	3/20/2013	Dispatch Tech.	BK	Kingman Bob
1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	2.00	120.000	0.000	240.00	
					Dispatch Total:	240.00
0002	3/20/2013	BK	Kingman Bob			
TRAVEL	Travel	2.30	55.000	0.000	126.50	
					Dispatch Total:	126.50
0003	3/21/2013	BK	Kingman Bob			
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	2.00	87.000	0.000	174.00	
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	1.00	45.000	0.000	45.00	
/C	Default Item Code /C	0.00	0.000	0.000	0.00	
INSTAL	Installation	5.00	55.000	0.000	275.00	
TRAVEL	Travel	1.00	55.000	0.000	55.00	
TRAVEL	Travel	1.00	0.000	0.000	0.00	
					Dispatch Total:	717.00
0004	3/21/2013	BK	Kingman Bob			
1001-HON-H254	HON 4 DRAWER LETTER FLE W/O LK	1.00	131.000	0.000	131.00	
					Dispatch Total:	131.00
0005	3/21/2013	BK	Kingman Bob			

Technician Dispatch History Report

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

Technician Dispatch History Report (SMD) 3/21/2013

Report Setting: Save

Description:

Setting Options:

Type: Print Report Settings: Number of Copies:

Default Report: Three Hole Punch: Collated:

Selections:

Select Field	Operand	Value
Customer Number	All	
Dispatch Technician	All	
Contract No.	All	
Task No.	All	
Task Type	All	
Dispatch No.	All	

Adobe PDF Keep Window Open After Print: Preview:

Here is an example of printout:

View Technician Dispatch History Report

BusinessObjects

Preview

1 / 1+

100%

Technician Dispatch History Report

SM Demo Company (SMD)

Technician AB Bergman AI

Dispatch Date 2/17/2012

Dispatch No. 0001 **Task No.** 0000001 System down

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

WARRSRV	Warranty Service	3.00	125.000	0.000	375.00
Dispatch Total :					375.00
Total for AB :					375.00

Technician BK Kingman Bob

Dispatch Date 3/17/2012

Dispatch No. 0001 **Task No.** 0000006 Installation

Contract No. **Customer Number** 01-BRESLIN Breslin Parts Supply

FLDSRV	Field Service	4.00	95.000	0.000	380.00
Dispatch Total :					380.00

Dispatch Date 3/20/2013

Dispatch No. 0002 **Task No.** 0000032 System Inspection

Contract No. 000000003 **Customer Number** 01-ABF American Business Futures

TRAVEL	Travel	2.30	55.000	0.000	128.50
Dispatch Total :					126.50

Dispatch No. 0003 **Task No.** 0000032 System Inspection

Contract No. 000000003 **Customer Number** 01-ABF American Business Futures

INSTAL	Installation	5.00	55.000	0.000	275.00
TRAVEL	Travel	1.00	55.000	0.000	55.00
TRAVEL	Travel	1.00	0.000	0.000	0.00

Both open and closed Dispatches are included in the report.

Customer Billing History Report

The **Customer Billing History Report** allows the user to get detail information about the Tasks and dispatches created for the selected Customer(s).

Customer Billing History Report (SMD) 3/21/2013

Report Setting: STANDARD

Description: Customer Billing History Report

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Selections:

Select Field	Operand	Value
Customer Number	All	
Task No.	All	
Dispatch No.	All	
Dispatch Date	All	

Adobe PDF

Keep Window Open After
 Print Preview

Print Preview Setup

Here is an example of printout:

View Customer Billing History Report

BusinessObjects

Customer Billing History Report

SM Demo Company (SMD)

Customer Number: 01-ABF American Business Futures

Task No.	Description	Item	Hours	Rate	Amount	Tax	Total
0000001	System down						
2/17/2012 AB	1001-HON-H252	HON 2 DRAWER LETTER FLE W/C	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
0000032	System Inspection						
3/20/2013 BK	1001-HON-H252	HON 2 DRAWER LETTER FLE W/C	2.00	120.000	0.000		240.00
				Task Total:			240.00
0000032	System Inspection						
3/20/2013 BK	TRAVEL	Travel	2.30	55.000	0.000		126.50
				Task Total:			126.50
0000032	System Inspection						
3/21/2013 BK	1001-HON-H252	HON 2 DRAWER LETTER FLE W/C	2.00	84.000	0.000		168.00
3/21/2013 BK	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/C	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
0000032	System Inspection						
3/21/2013 BK	1001-HON-H254	HON 4 DRAWER LETTER FLE W/C	1.00	131.000	0.000		131.00
				Task Total:			131.00
0000032	System Inspection						
3/21/2013 BK	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/C	2.00	87.000	0.000		174.00
3/21/2013 BK	1001-HON-H252LK	HON 2 DRAWER LETTER FLE W/C	2.00	87.000	0.000		174.00
3/21/2013 BK	1001-HON-H254LK	HON 4 DRAWER LETTER FLE W/C	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.

Productivity by Territory Report (SMD) 3/21/2013

Report Setting: STANDARD

Description: Productivity by Territory Report

Setting Options:

Type: Public Print Report Settings Number of Copies: 1

Default Report: Three Hole Punch: Collated:

Selections:

Select Field	Operand	Value
Territory Code	All	
Dispatch Technician	All	

Adobe PDF

Keep Window Open After Print: Preview:

Here is an example of printout:

View Productivity by Territory Report

1 / 1 | 100%

BusinessObjects

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.

Contract Job Code Posting History (ABC) 10/3/2013

Report Setting: STANDARD [Save]

Description: Contract Job Code Posting History

Setting Options:

- Type: Public
- Print Report Settings:
- Number of Copies: 1
- Default Report:
- Three Hole Punch:
- Collated:

Sort Report By: Contract Number

Selections:

Select Field	Operand	Value
Contract No.	All	
Job Code	All	
Customer Number	All	
Year	All	
Period	All	

Keep Window Open After:

Print Preview [Print] [Preview] [Setup] [Help]

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:

View Contract Job Code Posting History Report

1 / 1 120%

BusinessObjects

Preview

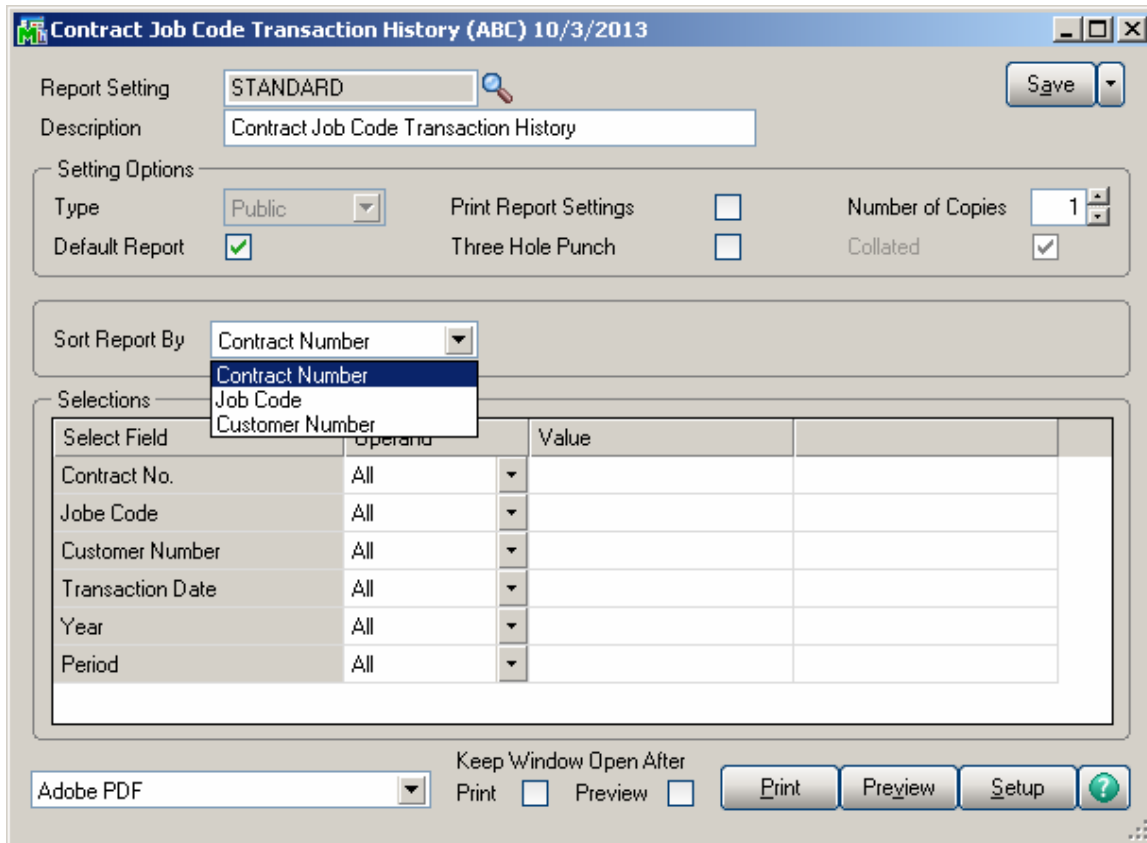
Contract Job Code Posting History Report
Sorted By Job Code

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-10N-000 Job Opt	000000080		01-ABF	American Business Futures	13.00	907.50	28,050.00	27,142.50
Job Code OPT-10N-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:

Contract Job Code Transaction History (ABC) 10/3/2013

Report Setting: STANDARD Save

Description: Contract Job Code Transaction History

Setting Options:

Type: Public Print Report Settings Number of Copies: 1

Default Report: Three Hole Punch: Collated:

Sort Report By: Job Code

Selections:

Select Field	Operand	Value	
Contract No.	All		
Jobe Code	Equal to	500000000	
Customer Number	All		
Transaction Date	All		
Year	Equal to	2013	
Period	Range	05	10

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

Here is an example of printout:

View Contract Job Code Trans History Report

Contract Job Code Trans History Report
Sorted By Job Code

ABC Distribution and Service Corp. (ABC)

Job Code/Description	Contract Number	Contract Description	Customer Number	Customer Name	Vendor Number	Year	Period	Unit Cost	Unit Price	Extension
Item Code	Item Description	Transaction Date	Reference Date	Type	Quantity					
500-000-000 Installation Labor										
000000080		01-ABF	American Business Futures			2013	10			
SAGE 100ERP	SAGE 100 ERP Standard	10/3/2013	SO 0100131-IN	10/3/2013	1.00	8250	10	8,000.00		8,000.00
000000080		01-ABF	American Business Futures			2013	10			
MIC ONTR	Monthly Maintenance Billing	10/3/2013	SO 0100131-IN	10/3/2013	1.00	950.00	10	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

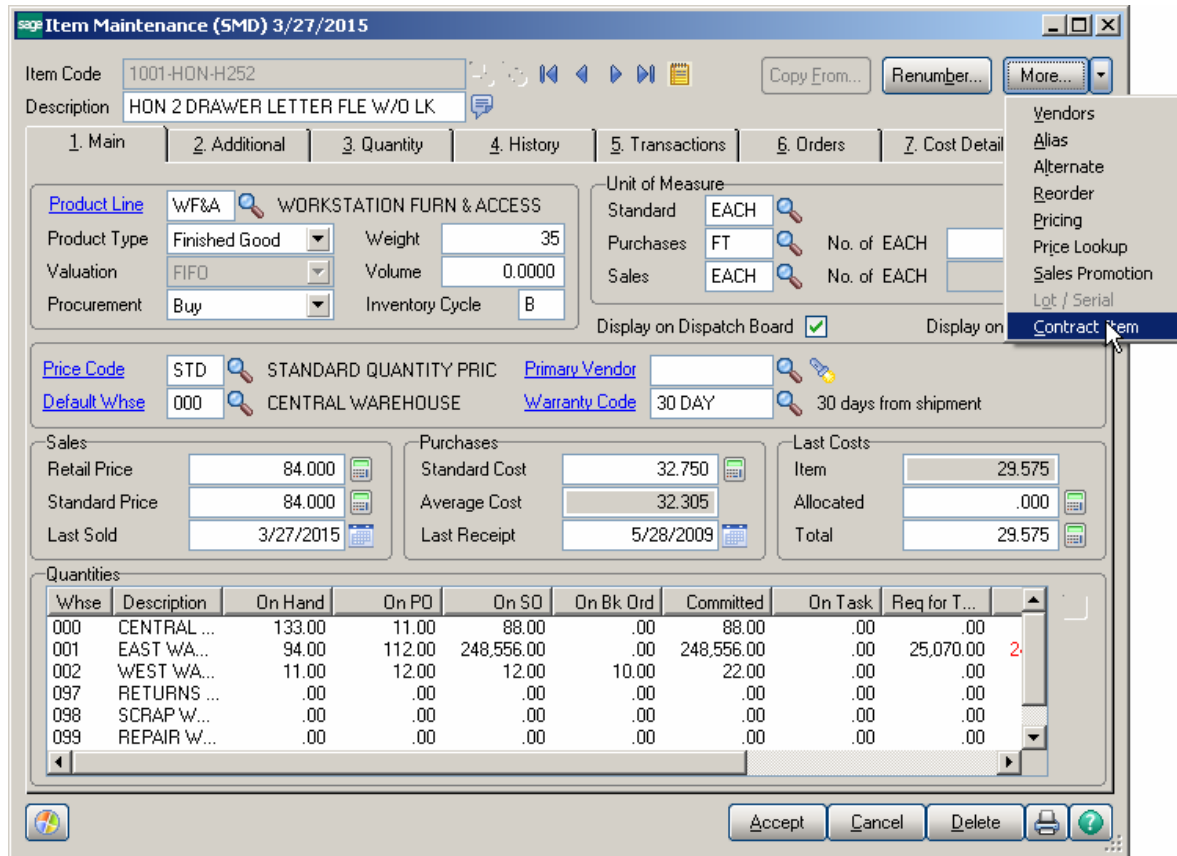
The **Track Customer Site Inventory** and **Generate Multiple Contracts** fields have been added to the **Additional** tab of the **Item Maintenance** screen.

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 you may enter/select a **Contract** number to be used as template when contracts are generated for current Item during **Daily Sales Reports/Updates**. Separate contracts are generated for each unit sold.

Use the **Job Code** field to enter the desired Job Code for a given item. Whenever the item is sold against a contract, appropriate costing and billing information will be posted to the contract file, organized by Job Code.

The **Contract** button added to the **More** menu buttons allows opening the **Contract Item Pricing Change** screen and update the Contract Item Price if needed.



sage Contract Item Pricing Change

Select Field	Operand	Value
Customer Number	All	
Contract Number	All	

Also Expired Contracts

	Customer No.	Starting Date	Ending Date	Description	Item Lot/SerialNo	Quantity	Price	New Price	Include
1	02-ALLENAP	2/26/2002	2/26/2016	3rd Party on-site mixed devic		1.00	75.00	84.00	<input checked="" type="checkbox"/>
2	02-ALLENAP	2/26/2002	2/26/2016	3rd Party on-site mixed devic		.00	.00	84.00	<input checked="" type="checkbox"/>
3	02-ALLENAP	2/26/2002	4/26/2019	Support Plan - 20 Hours		1.00	80.00	84.00	<input checked="" type="checkbox"/>
4	01-ABF	2/14/2014	2/14/2019	Installation Support		2.00	104.00	84.00	<input checked="" type="checkbox"/>
5	02-CUSTOM	3/26/2015	3/26/2020	Install		3.00	300.00	84.00	<input checked="" type="checkbox"/>
6	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input checked="" type="checkbox"/>
7	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input checked="" type="checkbox"/>
8	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input checked="" type="checkbox"/>
9	01-AVNET	3/31/2014	4/3/2024	Support Plan - 20 Hours		2.00	.00	84.00	<input checked="" type="checkbox"/>

Proceed Clear Cancel Update

After making the required selections click **Proceed** to load corresponding records in the grid.. Enter the **New Price** and select the **Include** checkbox. Click **Update** to apply the **New Price**.

sage Contract Item Pricing Change

Select Field	Operand	Value
Customer Number	All	
Contract Number	All	

Also Expired Contracts

	Contract No.	Customer No.	Starting Date	Ending Date	Description	Item Lot/SerialNo	Quantity	Price	New Price	Include
1	00000001	02-ALLENAP	2/26/2002	2/26/2016	3rd Party on-site mixed		1.00	75.00	80.00	<input checked="" type="checkbox"/>
2	00000001	02-ALLENAP	2/26/2002	2/26/2016	3rd Party on-site mixed		.00	.00	84.00	<input type="checkbox"/>
3	00000023	02-ALLENAP	2/26/2002	4/26/2019	Support Plan - 20 Hou		1.00	80.00	100.00	<input checked="" type="checkbox"/>
4	000000174	01-ABF	2/14/2014	2/14/2019	Installation Support		2.00	104.00	84.00	<input type="checkbox"/>
5	000000191	02-CUSTOM	3/26/2015	3/26/2020	Install		3.00	300.00	84.00	<input type="checkbox"/>
6	000000193	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input type="checkbox"/>
7	000000194	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input type="checkbox"/>
8	000000195	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input type="checkbox"/>
9	AVNET	01-AVNET	3/31/2014	4/3/2024	Support Plan - 20 Hou		2.00	.00	84.00	<input checked="" type="checkbox"/>

Proceed Clear Cancel Update

After Update the **Prcie** field is updated with the New Price:

Contract Item Pricing Change

Select Field	Operand	Value
Customer Number	All	
Contract Number	All	

Also Expired Contracts

	Contract No.	Customer No.	Starting Date	Ending Date	Description	Item Lot/SerialNo	Quantity	Price	New Price	Include
1	000000001	02-ALLENAP	2/26/2002	2/26/2016	3rd Party on-site mixed		1.00	80.00	80.00	<input checked="" type="checkbox"/>
2	000000001	02-ALLENAP	2/26/2002	2/26/2016	3rd Party on-site mixed		.00	.00	84.00	<input type="checkbox"/>
3	000000023	02-ALLENAP	2/26/2002	4/26/2019	Support Plan - 20 Hou		1.00	100.00	100.00	<input checked="" type="checkbox"/>
4	000000174	01-ABF	2/14/2014	2/14/2019	Installation Support		2.00	104.00	84.00	<input type="checkbox"/>
5	000000191	02-CUSTOM	3/26/2015	3/26/2020	Install		3.00	300.00	84.00	<input type="checkbox"/>
6	000000193	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input type="checkbox"/>
7	000000194	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input type="checkbox"/>
8	000000195	01-AVNET	3/27/2015	3/26/2020	Installation Support		1.00	84.00	84.00	<input type="checkbox"/>
9	AVNET	01-AVNET	3/31/2014	4/3/2024	Support Plan - 20 Hou		2.00	84.00	84.00	<input checked="" type="checkbox"/>

Proceed Clear Cancel Update

Product Line Maintenance

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

The screenshot displays the 'Product Line Maintenance (SMD) 3/27/2015' window. The 'Product Line' is 'C&A' and the 'Description' is 'CABLES & ACCESSORIES'. The 'Job Code' field is highlighted with a blue border and contains the value '400-000-000', with 'Service Revenue' displayed next to it. Other fields include 'Product Type' (Finished Good), 'Valuation' (Standard Cost), 'Procurement' (Buy), 'Inventory Cycle' (C), 'Allow Back Orders' (checked), 'Allow Trade Discount' (checked), 'Inactive Item' (unchecked), 'Explode Kit Items' (Prompt), 'Commission Method' (Standard), 'Commission Rate' (0.000%), 'Base Commission' (.00), 'Confirm Cost Increase in Receipt of Goods' (unchecked), 'Allocate Landed Cost' (checked), 'Unit of Measure' (EACH), 'Purchases' (EACH), 'Sales' (EACH), 'Sales Tax Class' (TX), 'Purchases Tax Class' (TX), 'Print Receipt Labels' (Yes), 'Price Code' (STD), 'Warranty Code', 'Allow Returns' (unchecked), 'Restocking Charge Method' (None), and 'Restocking Charge Rate' (.000%).

The program will search for Job Codes based on priorities. It will search first in the Inventory Master File, then in the Product Line Master File. If the system fails to find Job Codes in either of these master files, then it will use a **Material Job Code** from the **Service Management Options** program.

Bill of Materials Maintenance

The **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.

Bill of Materials Maintenance (SMD) 3/27/2015

Bill Number: BEL2500
 Revision: 000
 Description 1: POS Terminal
 Bill Type: Standard
 Description 2:

1. Header | 2. Lines

Drawing Number: POS INSTALLATION
 Drawing Revision:
 Routing Number: POS INSTALLATION
 Current Revision: 000
 Date Last Used:
 Maximum Lot Size: 0

Print Components:
 Bill Has Options:

Option Categories	
1	Display Pole <input type="checkbox"/> Required
2	Signature Pad <input type="checkbox"/> Required
3	<input type="checkbox"/> Required
4	<input type="checkbox"/> Required
5	<input type="checkbox"/> Required
6	<input type="checkbox"/> Required
7	<input type="checkbox"/> Required
8	<input type="checkbox"/> Required
9	<input type="checkbox"/> Required

Accept Cancel Delete [Printer Icon] [Help Icon]

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

Main Tab

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** can be entered also in the **Customer Ship To Address Maintenance** screen. Together with the **Territory Code** in the **Technician Master File**, this code can be used to filter out the tasks that can be dispatched to a given technician.

The “**Calculate taxes on Labor item**” checkbox is available on the **Main** tab of the **Customer Maintenance** if the “**Calculate taxes on Labor based on**” option is not set to **None** in the S/M options. Check this box to use the **Tax Classes** on Dispatch Lines.

Use the **Hours** button to launch the **Customer Hours Maintenance** screen to maintain the daily opening and closing times for the customer.

	Open Time	Close Time
Monday	9:00AM	6:00PM
Tuesday	9:00AM	6:00PM
Wednesday	9:00AM	6:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	5:00PM
Saturday	9:00AM	2:00PM
Sunday		

These hours can be viewed during **Task Data Entry** and **Dispatch Data Entry**.

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

Use the **Hours** button to launch the **Customer Ship to Hours Maintenance** screen to maintain the daily opening and closing times for the customer job site. These hours can be viewed during **Task Data Entry** and **Dispatch Data Entry**.

	Open Time	Close Time
Monday	8:00AM	5:00PM
Tuesday	8:00AM	6:00PM
Wednesday	8:00AM	6:00PM
Thursday	9:00AM	6:00PM
Friday	9:00AM	5:00PM
Saturday	9:00AM	2:00PM
Sunday	12:00AM	12:00AM

Check the **Calculate taxes on Labor** box to use the **Tax Classes** on Dispatch Lines, when the Ship to Address is selected for the task. This option is unavailable if the “**Calculate taxes on Labor based on**” option is set to “**None**” in the **S/M options**.

Additional Tab

The screenshot shows the Sage Customer Maintenance (SMD) software interface for customer 01-ABF, American Business Futures. The 'Additional' tab is active. Key fields and options include:

- Customer No.:** 01-ABF
- Name:** American Business Futures
- Comment:** Call Ed for credit approval.
- Open Item Customer:** Internet Enabled:
- Customer Status:** Active
- Default Task No.:** 0000100
- Data Entry:**
 - Price Level:** 1
 - Bill Freq Code:** 1 (highlighted with a blue box)
 - Dflt Pymt Type:** CREDIT CARD (dropdown), MC Card
 - Discount Rate:** .000 %
 - Fin Charge Rate:** 1.500%
 - Item Code:** WIDGET (8" x 10" Widgets)
- Printing:**
 - Sort:** AMER
 - Statement Cycle:** M
 - Customer Type:** A2
 - Print Dun Message:**
 - Batch Fax:**
- Contract is Required for Task:**
- Customer PO Number is Required for Task:**
- Primary Credit Card Information:**
 - Card ID:** 01ABF-V001
 - Payment Type:** MC (MC Card)
 - Cardholder Name:** Cardholder Name test 1
 - Last Four Digits:** *2817
 - Expiration Date:** 1/2017

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

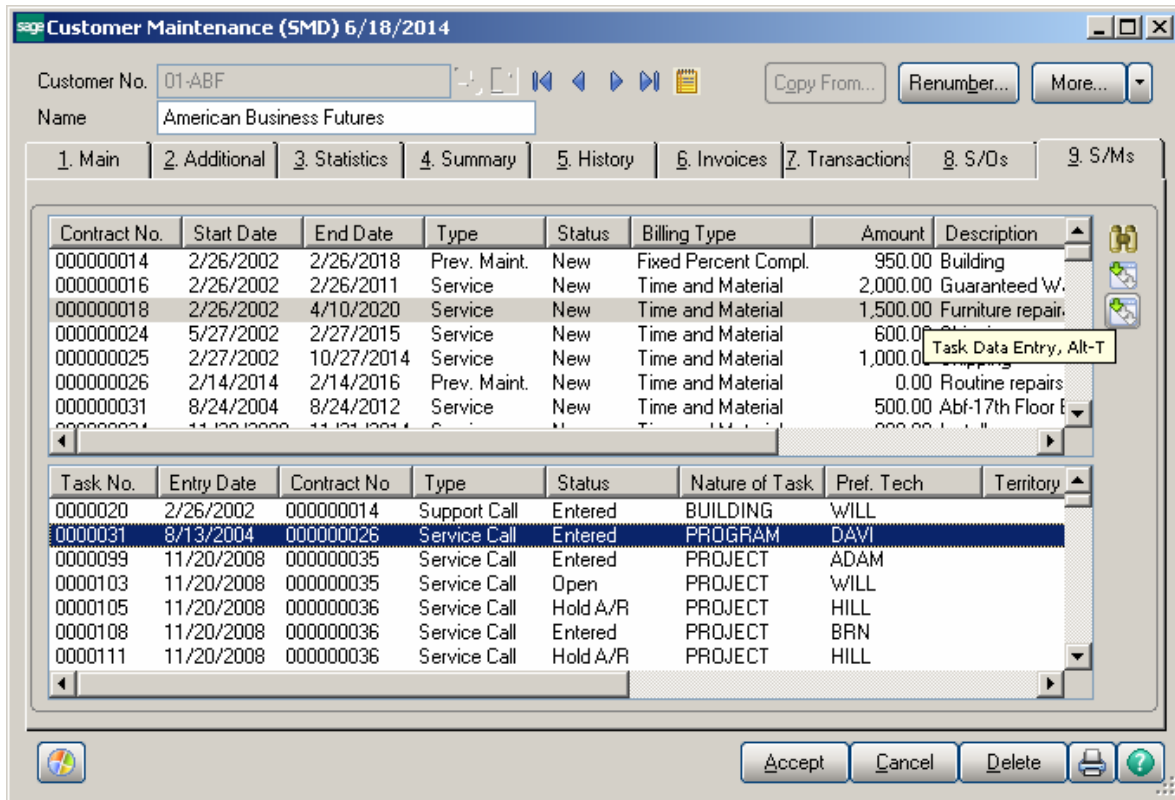
Select the **Contract is Required for Task** and **Customer PO Number is Required for Task** check boxes if you want the Tasks for current Customer to be always created with Contract and Customer PO Number specified.

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

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

S/Ms Tab

The **S/Ms** tab represents a list box, which displays all **Contracts** and **Tasks** for current Customer. Contract and Task Nos display all Contracts and Tasks sequentially. The Contract's **Total Amount** is displayed in the **Amount** field.



Use the Search button located to the right of the list box to search for Contracts/Tasks by applying additional selection filters.

Search for SMs

Contract Types to View
 All Types Service Prev. Maint. Fixed Hours

Contract Billing Types to View
 All Billing Types Time and Material Fixed Percent Compl.
 Fixed Upon Compl. Fixed On Going

Contract Statuses to View
 All Statuses Hold New Open Closed

Tasks
 View Tasks by Contract Active History

Select Field	Operand	Value
Contract Number	All	
Contract Starting Date	All	
Contract Ending Date	All	

OK Cancel

Select the **View Tasks by Contract** to load in the list box only the Tasks associated with the selected Contract.

Customer Maintenance (SMD) 6/18/2014

Customer No. 01-ABF
Name American Business Futures

Copy From... Renumber... More...

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os 9. S/Ms


Contract No.	Start Date	End Date	Type	Status	Billing Type	Amount	Description
000000026	2/14/2014	2/14/2016	Prev. Maint.	New	Time and Material	0.00	Routine repairs

Task No.	Entry Date	Contract No.	Type	Status	Nature of Task	Pref. Tech	Territory
0000031	8/13/2004	000000026	Service Call	Entered	PROGRAM	DAVI	
0000840	10/30/2013	000000026	Service Call	Entered		SANT	ARIZON
0000845	11/6/2013	000000026	Installation	Entered		SANT	ARIZON
0000846	11/6/2013	000000026	Service Call	Entered		SANT	ARIZON
0000847	11/6/2013	000000026	Manufacturing	Entered		SANT	ARIZON
0000848	11/6/2013	000000026	Service Call	Entered		SANT	ARIZON
0000849	11/6/2013	000000026	Manufacturing	Entered	SEWING	SANT	ARIZON

Accept Cancel Delete

The **Active** checkbox is selected by default to view Active Tasks. Select the **History** checkbox to view also the Tasks from History (with status "Closed").

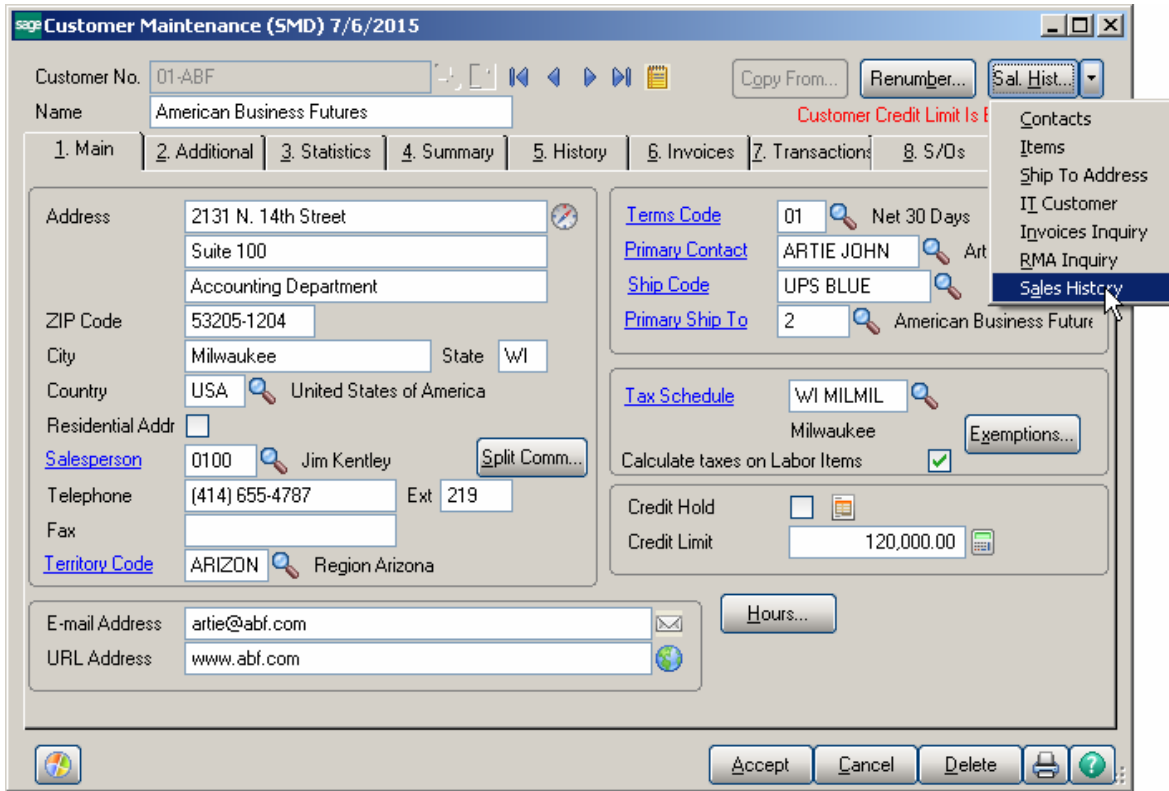
By default **All Types**, **All Billing Types** and **All Statuses** are selected for **Contracts** to view.

Use the  buttons located to the right to access correspondingly the **Contract Maintenance** and **Task Data Entry**.

The **S/Ms** list box has been provided also in the **Customer Inquiry**. From the **S/Ms** tab of the **Customer Inquiry** drill down to the **Task Inquiry** is available

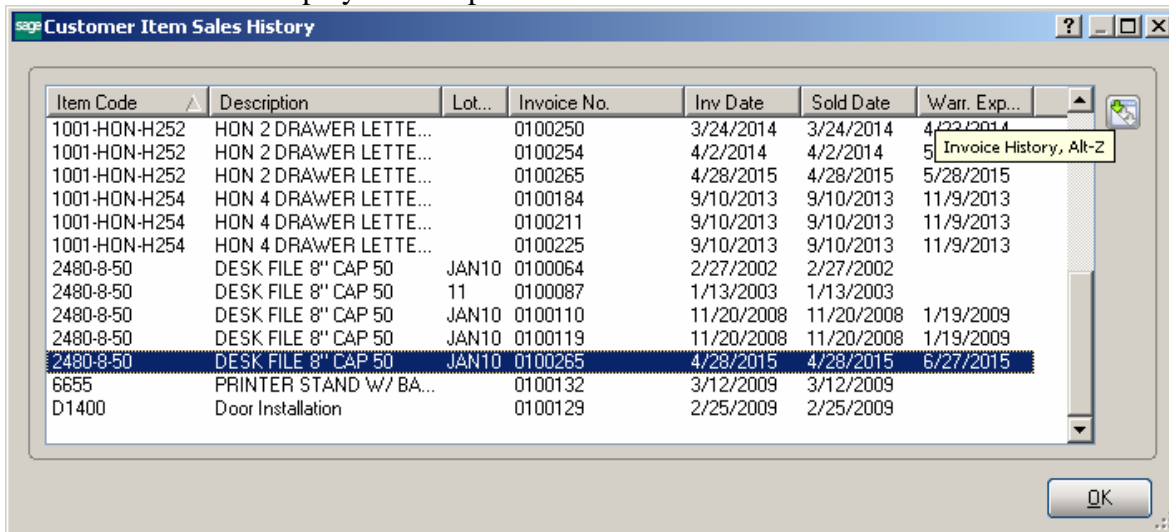
Customer Sales History

The **Sales History** button added under the **More...** drop down menu allows for viewing the Sales History of current Customer for the Items having the **Track Customer Site Inventory** option selected on the **Additional** tab of **Item Maintenance**.



Upon pressing **Sales History** button, the **Customer Item Sales History** screen is opened loaded with respective information about the Item, Invoice number, Invoice Date, Sold Date and Warranty Expiration Date.

The Sold Date field displays the Ship Date from Invoice Header.



There is an option for drill down to the Invoice History.

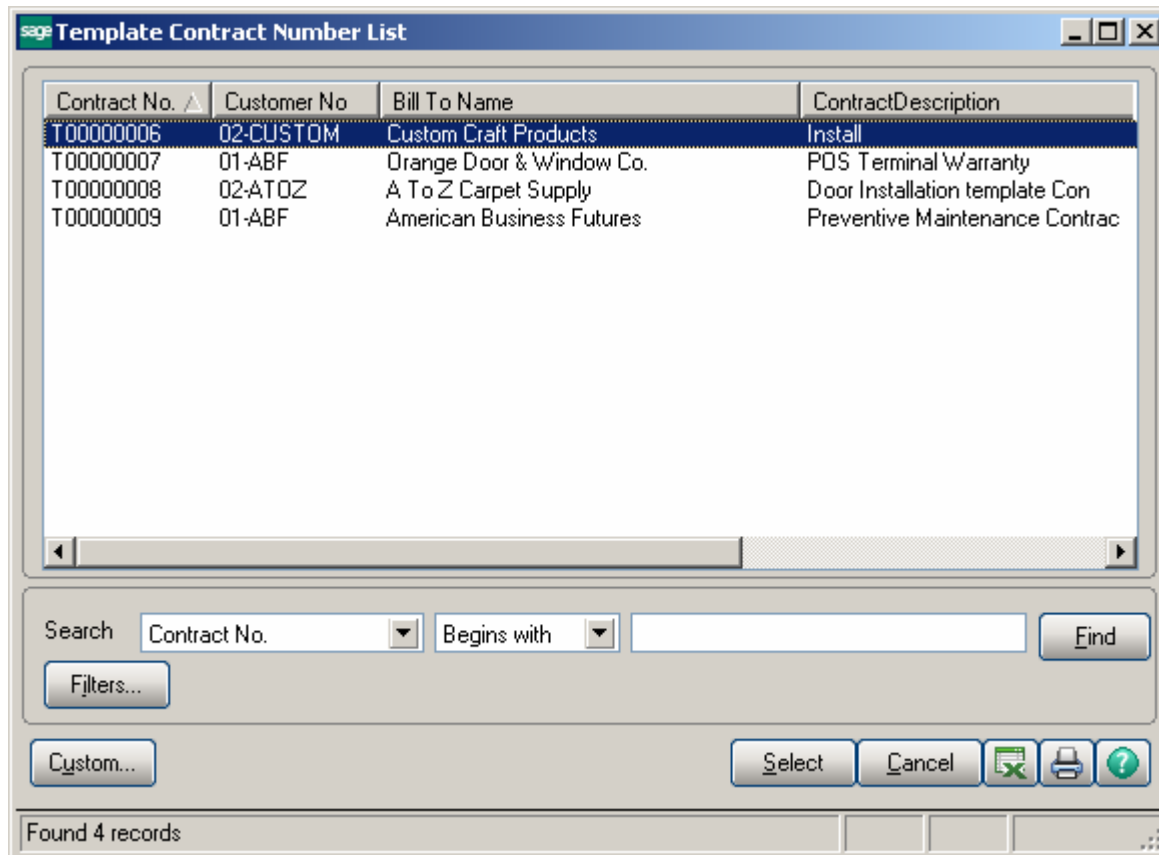
Sales Order Entry

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

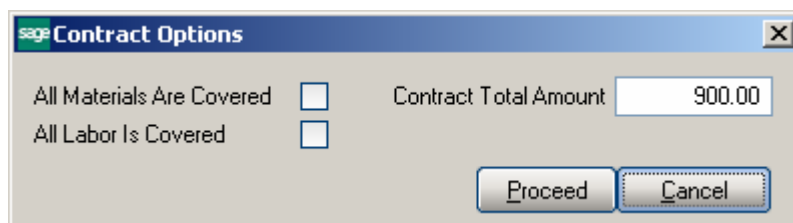
The screenshot displays the SAP Sales Order Entry (SMD) interface for the date 3/27/2015. The window title is "SAP Sales Order Entry (SMD) 3/27/2015". The interface is divided into several sections:

- Order Information:** Order Number (0000367), Order Date (3/27/2015), Order Type (Standard Order), Master/Repeating No. (empty), Customer No. (01-ABF), and Contract No. (000000174).
- Shipping Information:** Ship Date (3/27/2015), Ship To Addr (2), Terms Code (01), Ship Via (UPS BLUE), Confirm To (John Quinn), E-mail (artie@abf.com), and Salesperson (0100 - Jim Kentley).
- Warehouse and Tax Information:** Whse (001 - EAST WAREHOUSE), Sales Tax Schedule (WI), and Wisconsin (empty).
- Printing Options:** Print Order (checked), Print Pick Sheets (checked), No. of Ship Labels (1), and Quick Print Without Displaying Printing Window (unchecked).
- Navigation and Actions:** Buttons for Print Order, Print Pick, Recalc Price, Accept, Cancel, and Delete.

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 in the Lines tab for each item separately. If the **Item contract instead of Order Contract** box is checked in the **Service Management Options** program, items will have assigned the contracts specified for them in the **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.

Sage Sales Order Entry (SMD) 3/27/2015

Order Number: 0000367

Copy from... Defaults... Customer... Credit... Tasks

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | User: Userrig

Quick Row: 1

	Item Code	Ordered	Back Ordered	Unit Price	Create Contract	Extension
1	1001-HON-H252LK	2.00	.00	87.000	<input type="checkbox"/>	174.00
2		.00	.00	.000	<input type="checkbox"/>	.00

Description: HON 2 DRAWER LETTER FLE W/ LCK
Warehouse: 001
Unit Of Measure: EACH
Shipped: .00

(Average Cost = 37.150) Total Amount: 174.00

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

Installation Order Management

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

The screenshot displays the Sage Sales Order Entry (SMD) interface for the date 3/27/2015. The main window contains several sections:

- Order Information:** Order Number 0000367, Order Date 3/27/2015, Order Type Standard Order, and Customer 01-ABF (American Business Futures).
- Shipping Details:** Ship Date 3/27/2015, Ship To Addr 2, Terms Code 01 (Net 30 Days), and Ship Via UPS BLUE.
- Status and Warehouse:** Status is set to 'New', Reason is empty, and Whse is 001 (EAST WAREHOUSE).
- Sales Tax:** Schedule is WI.
- Personnel:** Salesperson is 0100 (Jim Kentley).
- Printing Options:** Checkboxes for 'Print Order' and 'Print Pick Sheets' are checked. 'No. of Ship Labels' is set to 1.

The screenshot shows the Sage Installation Management window with the following items and checkboxes:

- Order Review:**
- Ready for Installation:**
- Credit Approved:**
- In Production:**
- Installation In Process:**
- Installation Completed:**
- Change Order:**

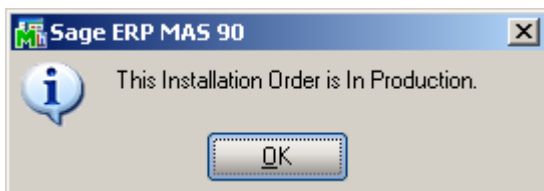
Some of these checkboxes are set automatically.

Order Review – this field should be checked manually.

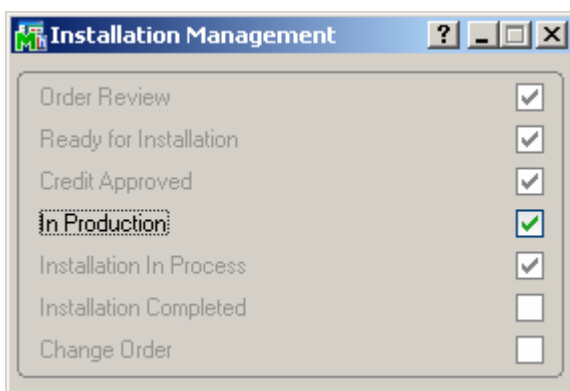
Ready for Installation –when checked indicates that inventory is available for installation. This checkbox should be set manually by inventory manager if inventory is in stock for all items.

In Production – shows that the Production Task has been generated and being produced. Is automatically checked when a Production Task is generated.

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:

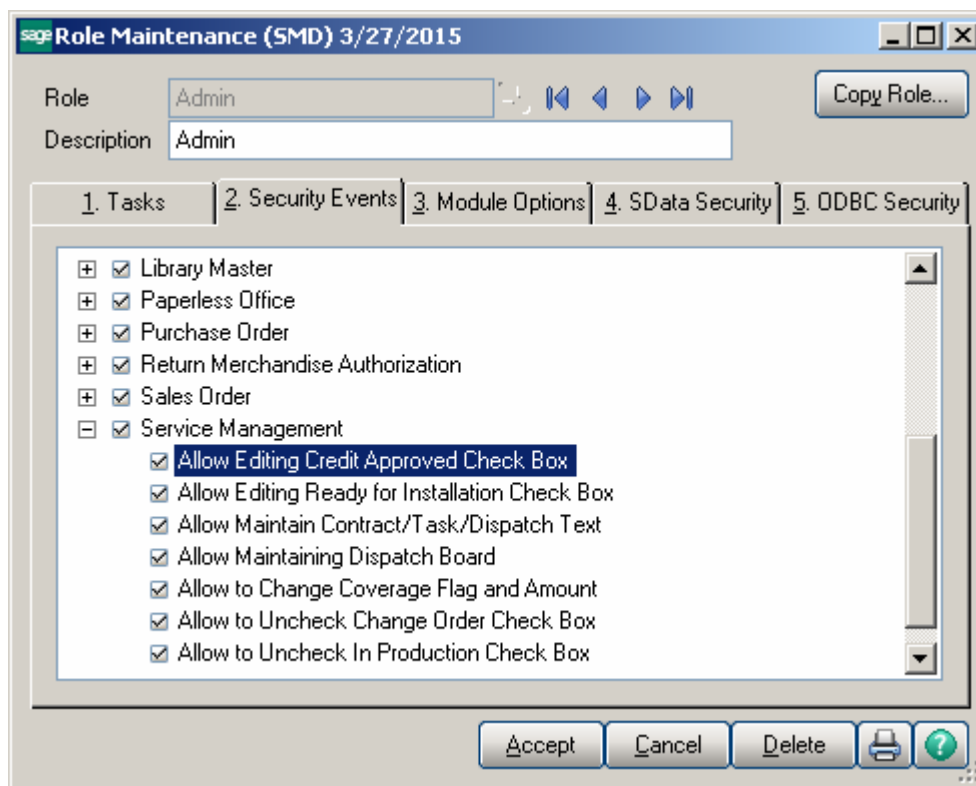
- changes to price after order review flag is set;
- changes to quantity ordered after Inventory Ready for Installation flag is set;
- adding/deleting items from the order with the Order Review checkbox selected.

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.

Sage Sales Order Entry (SMD) 3/27/2015

Order Number: 0000367

Copy from... Defaults... Customer... Credit... Tasks

1. Header | 2. Address | 3. Lines | Memo, Alt-H | 5. Credit Card | User: Useriig

Order Date: 3/27/2015 | Order Type: Standard Order | Master/Repeating No.

Customer No.: 01-ABF | American Business Futures | Cust PO

Contract No.: 000000196 | Install | Installation Order: Management

Ship Date: 3/27/2015

Status: New | Reason | Whse: 001 | EAST WAREHOUSE

Sales Tax: Schedule: WI | Wisconsin

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: | Docs Path:

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

Sage Sales Order Memo Maintenance (SMD) 3/27/2015

Memo Code: IM_CHANGES

Description: Installation Management Changes

Memo Date: 3/27/2015

Expiration Date:

Auto Display: Never

Reminder Start Date:

Reminder End Date:

Attachment:

Added New Line.[Useriig 3/27/2015 01:53:25 PM]
Changed Unit Price.[Useriig 3/27/2015 03:08:51 PM]
Changed Unit Price.[Useriig 3/27/2015 03:09:51 PM]
Changed Quantity Ordered.[Useriig 3/27/2015 03:09:51 PM]

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**

The screenshot shows the Sage S/O Order Tracking Dashboard interface. At the top, there are seven filter categories, each with an 'Ignore' checkbox and a checked status checkbox. A 'Ship Date' field with a calendar icon is also present. Below this is a table for field selection with columns 'Select Field', 'Operand', and 'Value'. The table contains three rows: 'Sales Order Number', 'Sales Order Date', and 'Customer Number', all with 'All' in the operand column. At the bottom is a large data table with columns 'Sales Order No.', 'Customer No.', 'Name', 'Order Date', and 'Ship Date'. The data table is currently empty. At the bottom of the window are 'Clear', 'Scan', and 'Cancel' buttons.

By this program the user can view:

- All the new installation orders that are added to the system,
- All installation orders that are entered, inventory is checked and purchase orders are ordered as needed

This program allows also for entry of **Ship Date** as a selection option. This selection option allows the users to view past due orders/tasks (requiring actions).

It is necessary to press scan after making the necessary selections:

Order Review Ignore Installation Completed Ignore

Ready for Installation Ignore Change Order Ignore

In Production Ignore Credit Approved Ignore

Installation In Process Ignore Ship Date

Select Field	Operand	Value
Sales Order Number	All	
Sales Order Date	All	
Customer Number	All	

Sales Order No.	Customer No.	Name	Order Date	Ship Date
0000111	02-JELCO	Jelco Packing	3/25/2015	5/1/2015
0000112	02-CUSTOM	Custom Craft Products	3/3/2015	3/28/2015
0000115	01-ABF	American Business Futures	5/18/2015	4/1/2015

Clear Scan Cancel

In our example the program loaded only the Orders, which are Reviewed and have a Ship Date equal or less than the Ship Date: 5/1/2015 specified on the screen. All other checkboxes have been ignored.

The Zoom button allows the user to open the selected Sales Order.

The screenshot shows the Sage Sales Order Entry (SMD) application window. The title bar reads "Sage Sales Order Entry (SMD) 3/26/2015". The interface includes a top navigation bar with tabs for "1. Header", "2. Address", "3. Lines", "4. Totals", and "5. Credit Card". The "Header" tab is active. Below the navigation bar, there are several input fields and controls:

- Order Number:** 0000112
- Order Date:** 3/3/2015
- Order Type:** Standard Order
- Customer No.:** 02-CUSTOM
- Contract No.:** (empty)
- Ship Date:** 3/28/2015
- Status:** Open
- Whse:** 001 EAST WAREHOUSE
- Sales Tax Schedule:** CA
- Ship To Addr:** (empty)
- Terms Code:** 02 (2% Ten Days, Net 30 Days)
- Ship Via:** UPS BLUE
- Confirm To:** Rex Anderson
- E-mail:** (empty)
- Fax No.:** (empty)
- Comment:** Call Rex prior to shipping
- Salesperson:** 0300 Harvey Earlwright
- Split Comm.:** No

At the bottom of the window, there is a toolbar with buttons for "Print Order...", "Print Pick...", "Recalc Price", "Accept", "Cancel", "Delete", and a help icon.

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 screenshot shows the Sage Sales Order Options (SMD) 3/26/2015 window. The interface includes a menu bar with options: 1. Main, 2. Entry, 3. Line Entry, 4. Forms, 5. Printing, 6. Quick Print, 7. History, 8. Job Cost. The main area is divided into several sections:

- Batch Processing:** A table with columns: Description, Enable, Next Batch. The row for 'Invoice Data Entry' has 'Enable' checked and 'Next Batch' as '00024'.
- Commissions:** 'Split Commissions Between Salespersons' is checked. 'Customer Split Commission to Override Ship-To Salesperson' is unchecked.
- Default Warehouse for Order/Invoice Header:** Set to '001'.
- Use Shipping Code to Calculate Freight:** Set to 'Yes'.
- Files to Check for Duplicate Customer PO Numbers:** Five checkboxes for 'Check Sales Order Entry', 'Check Sales Order Invoice Data Entry', 'Check Sales Order History', 'Check Accounts Receivable Invoice Data Entry', and 'Check Accounts Receivable Invoice History' are all unchecked.
- Task Types For:** 'Production' and 'Installation' checkboxes are both unchecked.
- Installation Management:** 'Credit Approve All Orders' is unchecked.
- Allow Transfer Lines From Template Contract to Sales Order:** This checkbox is checked and highlighted with a blue box.

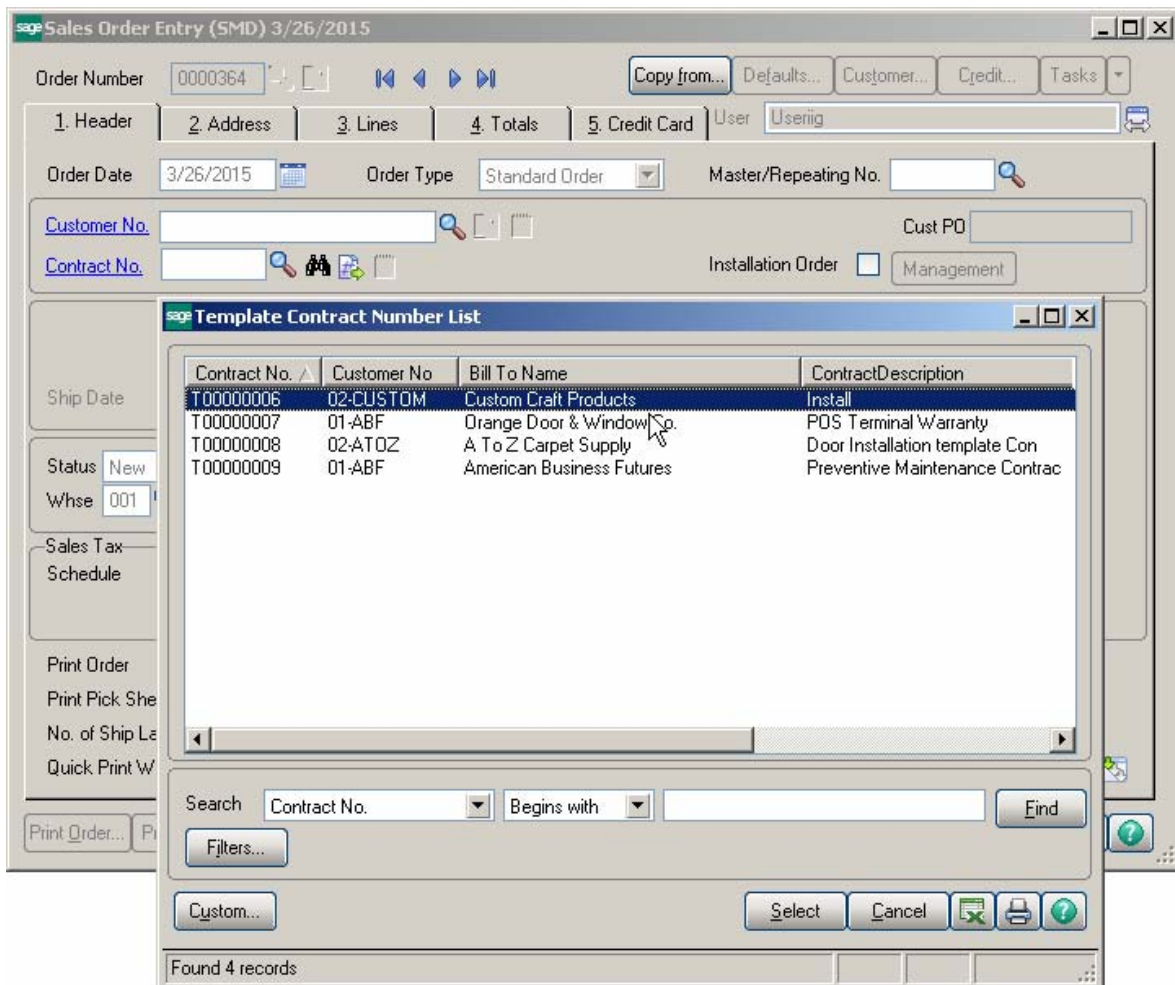
At the bottom right, there are buttons for 'Accept', 'Cancel', and a help icon.

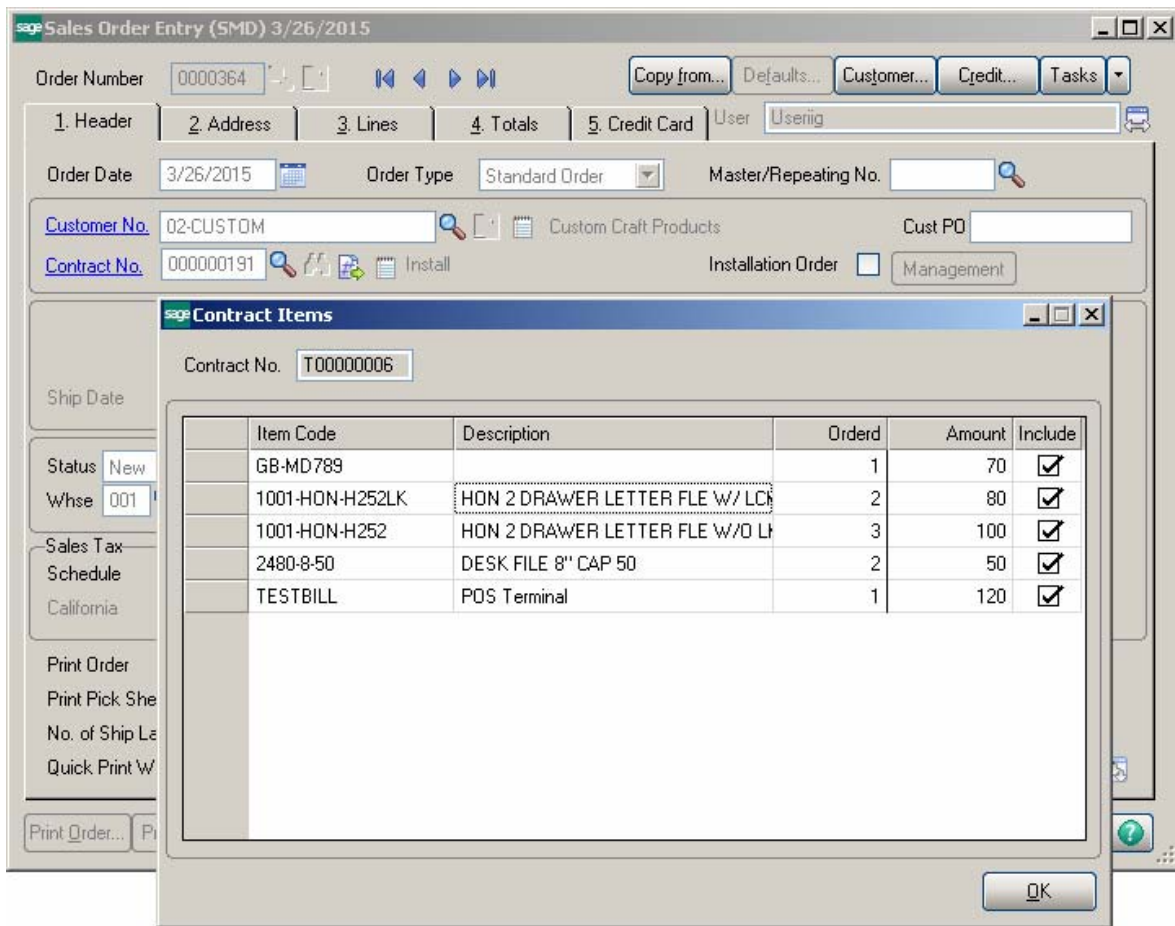
The **Task Types for** options allow specifying Task types to be used when generating Task for Sales Order Header.

Creating Sales Order Based on Template Contract

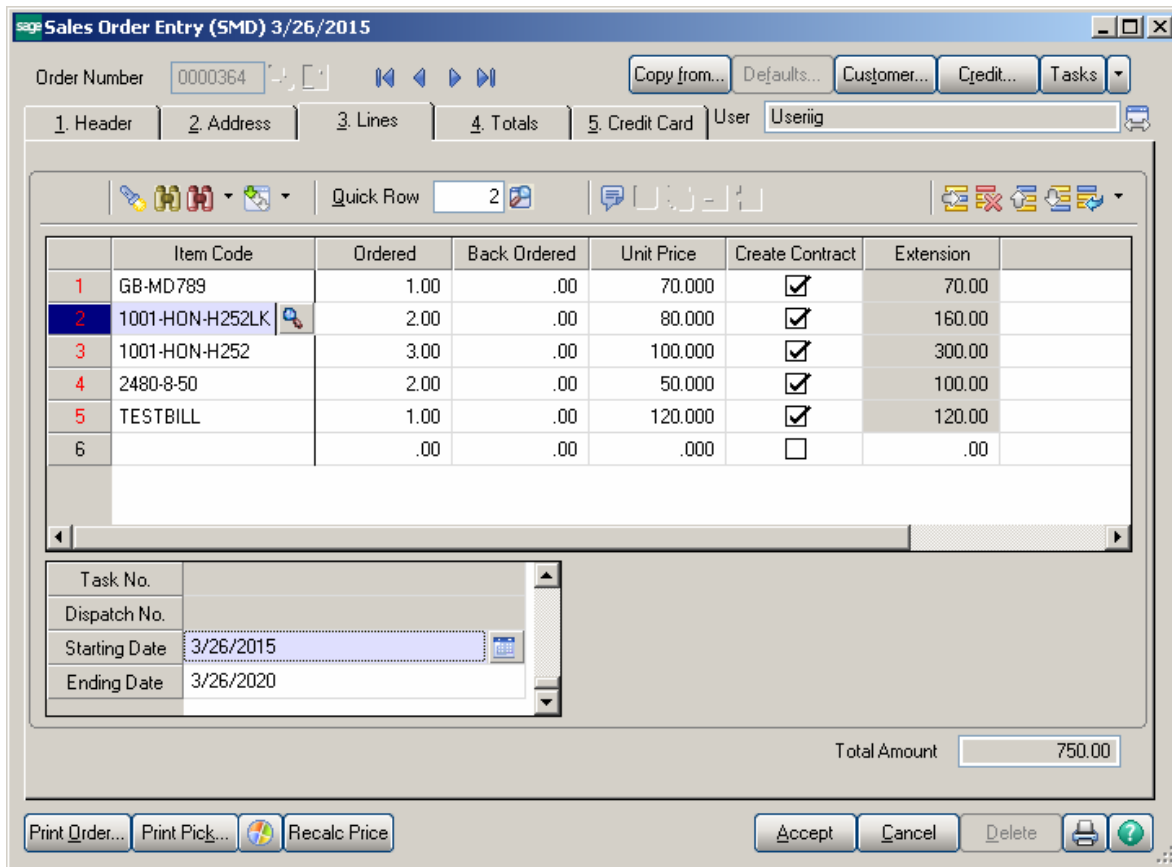
If the **Allow Transfer Lines From Template Contract To Sales Order** checkbox is selected in the Sales Order options, while creating a Sales Order the user may create a new Contract based on the template contract or select an existing Contract and add additional Items from the template Contract:

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 5 year in the Template Contract the Starting- Ending Dates in the Sales Order will be set so that to have the same 5 year duration. In our example the Starting Date in the Template Contract was 2/26/2010 and ending Date was 2/27/2015. After the line is loaded in the Sales Order its Starting Date is set equal to Order Date: 3/26/2015 and the Ending Date is 3/26/2020.

The Sales Order Header Contract is defaulted to the lines Item Contract field. The **Create Contract** check box allows for transferring lines into the Contract Items Maintenance during Daily Sales Update.

If the **Create Contract** checkbox is selected for an Item in the Sales Order lines, the Item will be added to respective Contract after the Sales Order is invoiced and the Sales Journal updated.

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

The screenshot shows the Sage Contract Item Maintenance (SMD) window for 3/26/2015. At the top, the Customer No. is '02-CUSTOM' and the Contract Number is '000000191'. Below this is a table with the following columns: Item Code, Lot/Serial Number, DI, Quantity, Amount, Starting Date, and Ending Date. The first row contains the value '1' in the Item Code column, and the Quantity and Amount columns show '.00'. Below the table is a list of fields: Description, Coverage Code, Response Code, Ship To, Billing Freq., and PM Code. At the bottom right, there are buttons for 'Accept', 'Cancel', and 'Delete'.

Item Code	Lot/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date
1		<input type="checkbox"/>	.00	.00		

There are no Contract items.

Invoice No. 0100260 Batch 00024

1. Header 2. Address 3. Lines 4. Totals 5. Credit Card

	Item Code	Ordered	Shipped	Unit Price	Extension	Comment
1	GB-MD789	1.00	1.00	70.000	70.00	
2	1001-HON-H252LK	2.00	2.00	80.000	160.00	
3	1001-HON-H252	3.00	3.00	100.000	300.00	
4	2480-8-50	2.00	2.00	50.000	100.00	
5	TESTBILL	1.00	1.00	120.000	120.00	
6	6655	2.00	2.00	179.000	358.00	
7	8971	3.00	3.00	2.350	7.05	
8		.00	.00	.000	.00	

Description: Warehouse 001, Unit Of Measure EACH, Back Ordered .00

Total Amount 1,115.05

Quick Print Accept Cancel Delete

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

Sage Contract Item Maintenance (SMD) 3/26/2015

Customer No. Custom Craft Products
 Contract Number

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

	Item Code	Lot/Serial Number	DI	Quantity	Amount	Starting Date	Ending Date
1	GB-MD789	300-1788	<input checked="" type="checkbox"/>	1.00	70.00	3/26/2015	7/11/2018
2	1001-HON-H252LK		<input type="checkbox"/>	2.00	160.00	3/26/2015	3/26/2020
3	1001-HON-H252		<input type="checkbox"/>	3.00	300.00	3/26/2015	3/26/2020
4	2480-8-50	JAN10	<input type="checkbox"/>	2.00	100.00	3/26/2015	3/26/2020
5	TESTBILL		<input type="checkbox"/>	1.00	120.00	3/26/2015	3/26/2020
6	6655		<input type="checkbox"/>	2.00	358.00	3/26/2015	3/26/2020
7	8971	JAN10	<input type="checkbox"/>	3.00	7.05	3/26/2015	3/26/2020

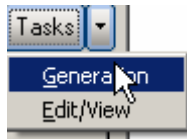
Description: HON 2 DRAWER LETTER FLE W/ LCK
 Coverage Code
 Response Code
 Ship To
 Billing Freq.
 PM Code

Accept Cancel Delete

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.

 A screenshot of the 'Sales Order Entry (SMD) 3/26/2015' window. The 'Tasks' menu is open, and the 'Generation' button is highlighted. The window displays various fields for a sales order, including Order Number (0000365), Order Date (3/26/2015), Order Type (Standard Order), Customer No. (01-ABF), Contract No. (000000014), Ship Date (3/26/2015), Status (New), Whse (001), Sales Tax Schedule (WI), Ship To Addr (2), Terms Code (01), Ship Via (UPS BLUE), Confirm To (John Quinn), E-mail (artie@abf.com), Salesperson (0100), and Split Comm. (No). There are also checkboxes for 'Print Order' and 'Print Pick Sheets', and a 'No. of Ship Labels' field set to 1.

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

The 'Generate Tasks' dialog box is shown with the following fields:

- Next Task Number: 0000963
- Routing Number: [Empty]
- Bill Number: [Empty]
- Options: [Empty]
- TaskType: [Empty]
- Nature of Task: [Empty]

Buttons: Generate, Cancel

Press Generate button:

Sage 100 ERP
Task generation is completed.
OK

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

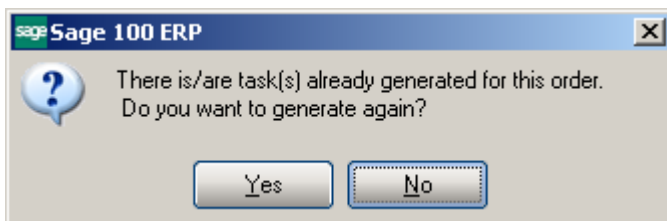
Sales Order Tasks (SMD) 3/26/2015
Sales Order No. 0000365

	Task Number	Task Description	Task Date	Technician Code	Task Type
1	0000963		3/26/2015	SANT	Service Call

Buttons: Accept, Cancel

The Task Zoom button allows for drill down to Task Data Entry:

Once a task has been generated for Sales Order Header the following message will appear when trying to generate another Task from the Sales Order header:

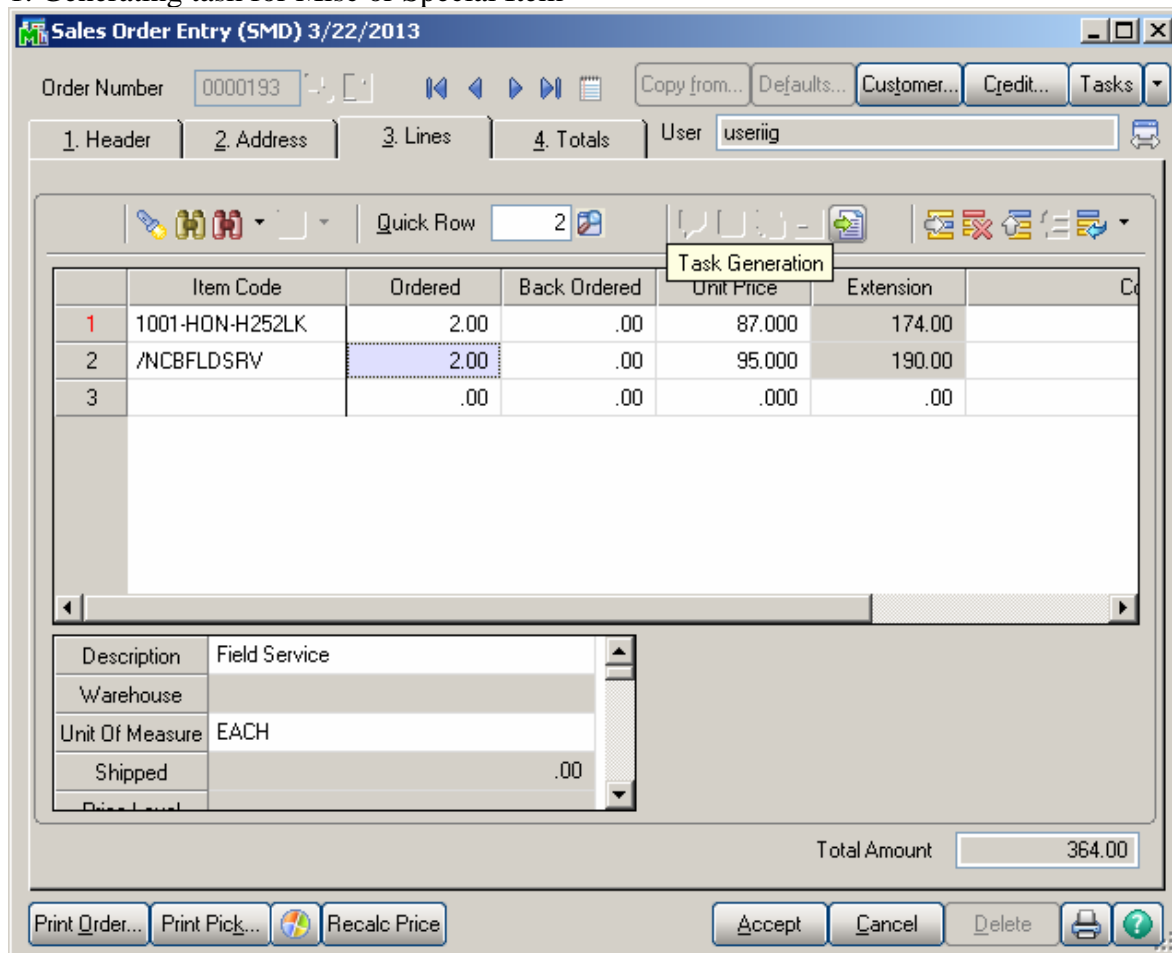


Upon selecting Yes a new Task will be generated for the Sales Order Header.

On the **Lines** tab, tasks generation is available only for order lines with Miscellaneous, Special and Bill Items.

The **Task Generation** button is enabled only if the selected line contains Misc Item, Special Item or Bill Item.

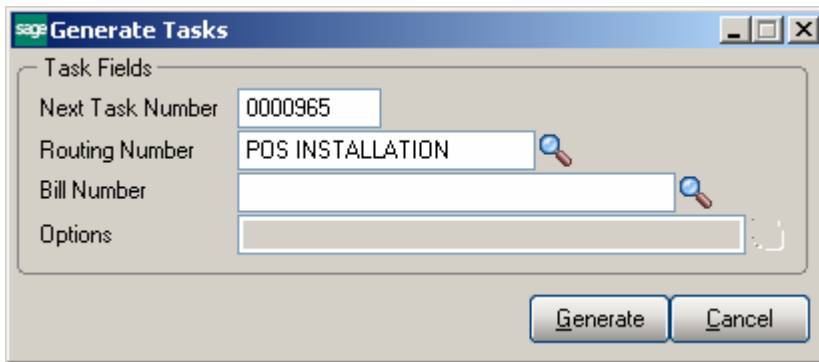
1. Generating task for Misc or Special Item



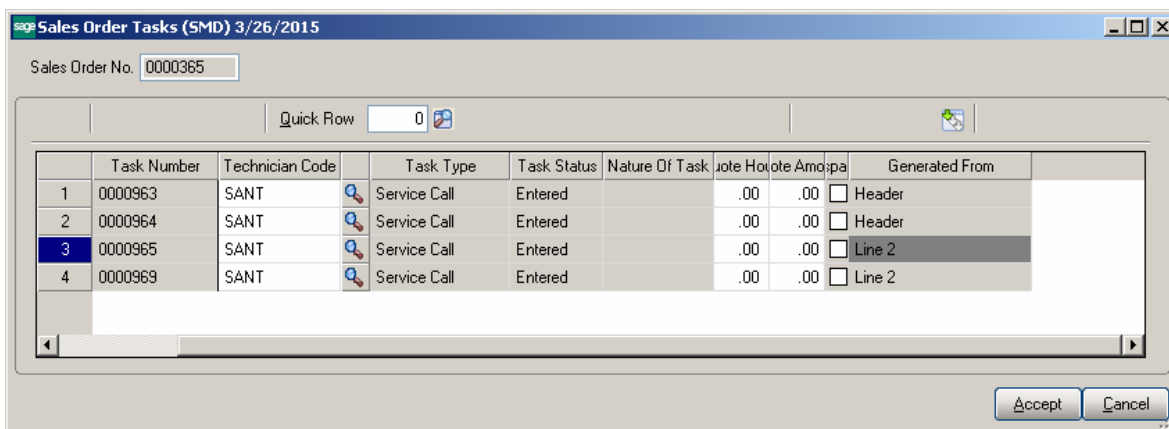
Press the **Task Generation** button to open the Generate Tasks screen. The Routing Number or Bill Number is required when Task is generated from SO line.



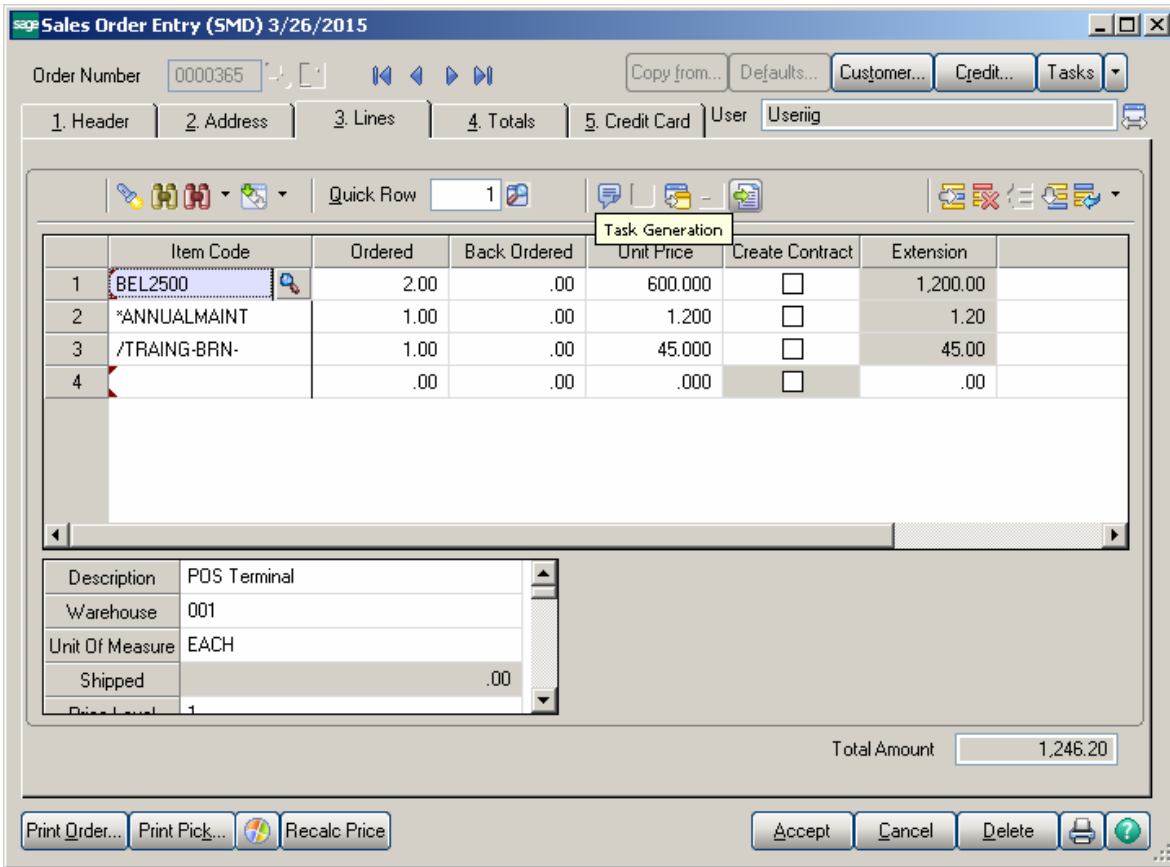
Select a Routing Number or a Bill Number:



When the **Routing Number** is specified, tasks are generated for the steps of the routing, with the **Generate Task** checkbox selected in the **Routing Maintenance**. Here are the Tasks generated for the selected Routing number:

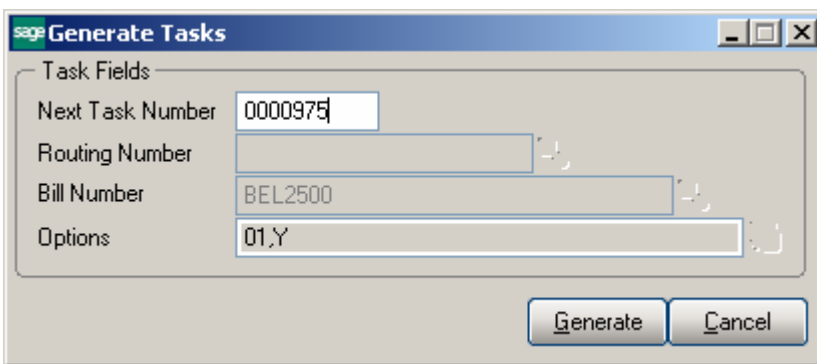


2. Task Generation for a Bill Item (available if the **Present Sales Kit as a Set of Regular Items** option is turned off in the **Service Management Options**):



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. If in the Miscellaneous Item Maintenance there is Miscellaneous Charge type Item setup that matches the Labor Code, a Labor Charge line will be added for the Step of the Routing having that **Labor Code and Technician** specified.

If there is Routing Number (with respective steps for Task generation) assigned to the Bill Option Code additional tasks are generated for that option code by the same logic.

Task Number	Task Description	Task Date	Technician Code	Task Type	Task Status	Nature Of Task	Rate	Hrs	Amt	Dispatch	General
4	Cabinet Work / ho	3/26/2015	SANT	Service Call	Entered		.00	.00		<input type="checkbox"/>	Line 2
5	Pull Material	3/26/2015	SANT	Manufacturing	Entered		.00	.00		<input type="checkbox"/>	Line 1
6	Assembly Unit	3/26/2015	SANT	Manufacturing	Entered		.00	.00		<input checked="" type="checkbox"/>	Line 1
7	Test Unit	3/26/2015	SANT	Service Call	Entered		.00	.00		<input type="checkbox"/>	Line 1
8	Get electrical	3/26/2015	SANT	Service Call	Entered		.00	.00		<input type="checkbox"/>	Line 1
9	Cabinet Work / ho	3/26/2015	SANT	Service Call	Entered		.00	.00		<input type="checkbox"/>	Line 1
10	Installation of softw	3/26/2015	SANT	Service Call	Entered	TRAINING	.00	.00		<input checked="" type="checkbox"/>	Line 1

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

Dispatch No.	Dispatch Date	Technician	Technician Name	Status
0001	3/26/2015	ADAM	Adams Arnold	Open

The Bill Item is exploded in the generated Dispatch:

The screenshot shows the Sage Dispatch Data Entry (SMD) interface for 3/26/2015. The window title is "Sage Dispatch Data Entry (SMD) 3/26/2015". At the top, there are fields for "Task No." (0000980) and "Dispatch No." (0001), along with a description "Installation of software" and a user field "User: Useriig". Below this are tabs for "1. Header", "2. Lines", and "3. Credit Card".

The main area contains a table with the following data:

	Item Code	Description	Ordered	Unit Price
1	BEL2500	POS Terminal	2.00	600.000
2	1001-HON-H252	HON 2 DRAWER LETTER FLE W/O LK	20.00	78.120
3	4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	2.00	45.000
4	6655	PRINTER STAND W/ BASKET	4.00	179.000
5			.00	.000

Below the table, there are fields for "Warehouse" (001), "Unit Of Measure" (EACH), "Price Level" (1), and "Tax Class" (TX). At the bottom right, the "Total Amount" is displayed as 3,568.40. At the very bottom, there are buttons for "Quick Print", "BMA", "Manufacturing", "Labor", "Accept", "Cancel", and "Delete".

Here is the Labor charge line added:

sage Labor Charge Data Entry (SMD) 3/26/2015

Task No. Dispatch No. Dispatch Date Starting Ending

 Quick Row

	Labor/Skill Code	Technician Code	Hours Spent	Billing Rate	Extension
1	INSTALL	ADAM	.00	55.000	.00
2			.00	.000	.00

Description	Installation Services
Tax Class	TX
Disc %	0.000
Over. Start Date	3/26/2015
Over. Start Time	04:58 PM

Total Amount

Production Generation when Closing Manufacturing Dispatch

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

The screenshot shows the 'sage B/M Production Entry Batch' window. It contains the following fields and controls:

- Batch Number:** A text input field with a search icon and navigation arrows.
- Comment:** A text input field.
- Private Batch:** A checkbox.
- Status:** A dropdown menu.
- Entries:** A text input field containing the value '0'.
- Created By:** A text input field.
- Modified By:** A text input field.
- Buttons:** 'Modify...', 'Verify', 'Renumber...', 'Merge...', 'Accept', 'Cancel', 'Delete', and a help icon.

The screenshot shows the 'sage Production Entry (SMD) 3/27/2015' window. It contains the following fields and controls:

- Production Number:** A text input field containing '0000004'.
- Batch:** A text input field containing '00004'.
- Production Date:** A date picker set to '3/27/2015'.
- Bill Number:** A text input field containing 'BEL2500'.
- Bill Type:** A dropdown menu set to 'Standard'.
- Revision:** A text input field containing '000'.
- Option Code:** A text input field.
- Quantity:** A text input field containing '2.00'.
- Unit of Measure:** A dropdown menu set to 'EACH'.
- Parent Warehouse:** A dropdown menu set to '001' with 'EAST WAREHOUSE' displayed.
- Component Warehouse:** A dropdown menu set to '001' with 'EAST WAREHOUSE' displayed.
- Explode Sub-Assemblies:** A checkbox.
- Buttons:** 'Accept', 'Cancel', 'Delete', 'Print', and a help icon.

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.

	Component Item Code	Extended Quantity	Comment
1	1001-HON-H252LK	4.00	
2	1001-HON-H254LK	2.00	
3	2480-8-50	.00	Quantity/Bill - 1 (Generation from S/M)
4	4886-18-14-3	2.00	
5	6650-26-16-11	2.00	
6		.00	

Description	DESK FILE 8" CAP 50
Warehouse	001
Unit Of Measure	EACH
Costing	Lot

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	Co
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

Ship Date 3/22/2013

Total Amount 168.00

Quick Print Accept Cancel Delete

Return Merchandise Authorization

RMA Entry

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

The screenshot shows the Sage RMA Entry (SMD) 3/27/2015 window. The RMA Number is 0000032. The interface is divided into three tabs: 1. Header (selected), 2. Address, and 3. Lines. The Header tab contains the following fields and options:

- RMA Date: 3/27/2015
- Customer No. (with search icon)
- Contract No. (with search icon and a tooltip "Next Contract No., Alt W")
- RMA Status: New
- Expire Date: 4/26/2015
- Return Via: MAIL
- Return To: 0000 (with search icon)
- DEFAULT RETURN TO ADDF (with "Return Addr..." button)
- Ship To (with search icon)
- Confirm To (with search icon)
- Comment (with search icon)
- E-mail (with search icon)
- Fax No. (with search icon)
- Batch Fax (checkbox)
- Inspect on Receipt (checkbox)
- Cross Ship (checkbox)
- Apply Restocking Charges (checkbox, checked)
- Print Customer RMA (checkbox, checked)
- Print RMA Receiver (checkbox, checked)

At the bottom of the window, there are buttons for "Quick Print...", "Express Sales Order...", "Accept", "Cancel", "Delete", and a printer icon.

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

Contract No. ▲	Customer No	Bill To Name	ContractDescription
T00000006	02-CUSTOM	Custom Craft Products	Install
T00000007	01-ABF	Orange Door & Window Co.	POS Terminal Warranty
T00000008	02-ATOZ	A To Z Carpet Supply	Door Installation template Con
T00000009	01-ABF	American Business Futures	Preventive Maintenance Contract

Search

Found 4 records

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

RMA Number: 0000032

RMA Date: 3/27/2015

Customer No.: 02-CUSTOM

Contract No.: 000000197

RMA Status: New

Expire Date: 4/26/2015

Return Via: MAIL

Return To: 0000

Ship To: [Empty]

Confirm To: Rex Anderson

Comment: [Empty]

E-mail: [Empty]

Fax No.: [Empty]

Batch Fax:

Inspect on Receipt:

Cross Ship:

Apply Restocking Charges:

Print Customer RMA:

Print RMA Receiver:

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

Sage Contract Data Entry (SMD) 3/27/2015

Contract No. 000000197 NTC Install Customer... Credit...

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

Contract Date: 3/27/2015

Customer No. 02-CUSTOM Custom Craft Products

Contract Type: Service
 Contract Status: New
 Start Date: 3/27/2015
 End Date: 3/27/2020
 Billing Type: Time and Material

Job Site Code: 21 Custom Craft Products
 Confirm To: Rex Anderson
 Comment:
 Fax No.:
 E-mail:

Generation Document: None
 Contract Amount From: Header
 Bill Freq Code:

Tech:
 All Materials Are Covered
 All Labors Are Covered

PM Code:
 Number of Days: 0 Last Task Gen. Date:
 Task Type:
 Nature of Task:
 Total Fixed Hours: 0 Used Hours: 0:00
 Documents Path: C:\Documents and Settings\IIG\My Document

Contract Items

Total Amount: 900.00

Quick Print | Generation | Copy from... | Accept | Cancel | Delete

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

Sage Sales Order Entry (SMD) 3/27/2015

Order Number: 0000370

Copy from... Defaults... Customer... Credit... Tasks

1. Header | 2. Address | 3. Lines | 4. Totals | 5. Credit Card | User: Useriig

Order Date: 3/27/2015 | Order Type: Standard Order | Master/Repeating No.:

Customer No.: 02-CUSTOM | Custom Craft Products | Cust PO:

Contract No.: 000000197 | Install | Installation Order: Management

Ship Date: 3/27/2015

Status: New | Reason: | Whse: 001 | EAST WAREHOUSE

Sales Tax: Schedule: CA | California:

Ship To Addr: | Terms Code: 02 | 2% Ten Days, Net 30 Days

Ship Via: UPS BLUE | FOB: | Confirm To: Rex Anderson



E-mail: | Fax No.: | Batch Fax:

Comment: | Salesperson: 0300 | Harvey Earlwright

Split Comm.: No | Split Comm...:

Print Order: | Print Pick Sheets: | No. of Ship Labels: 1

Quick Print Without Displaying Printing Window: | Docs Path:

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

RMA Receipts Entry

The **Contract No.** field with its **Contract Memo** has been added to the **Header** tab of **RMA Entry** screen:

The screenshot displays the 'RMA Receipts Entry (SMD) 10/11/2013' window. The 'Header' tab is active, showing the following fields and values:

- RMA No.: 0000074
- Receipt Date: 10/11/2013
- Customer No.: 01-ABF (American Business Futures)
- Contract No.: 000000243
- RMA Date: 10/11/2013
- RMA Status: 1 Step
- Return Via: MAIL
- Return To: 0000 (DEFAULT RETURN TO ADD)
- Ship To: 2 (American Business Futures)
- Confirm To: John Quinn
- Comment: Call Ed for credit approval.
- E-mail: artie@abf.com
- Fax No.: (empty)

Additional options include 'Inspect on Receipt' (unchecked), 'Cross Ship' (unchecked), and 'Apply Restocking Charges' (checked). Navigation buttons at the bottom include 'Accept', 'Cancel', 'Delete', and a help icon.

The user can select a **Contract No** from the Contract lookup list while entering RMA Receipt.

While generating transactions the Contract number is transferred to the generated sales documents: Sales Order and Credit Memo type Invoice:

S/O Invoice Data Entry (SMD) 10/11/2013

Invoice No. Batch Defaults... Customer... Credit...

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

Invoice Date Invoice Type Sales Order Number

Customer No. American Business Futures
 Contract No. Cust PO

Order Status
 Ship Date
 Due Date
 Discount Date
 Warehouse EAST WAREHOUSE

Sales Tax Schedule California

Apply to Inv # RMA No. Print Invoice
 Ship To Addr American Business Futures
 Terms Code Net 30 Days
 Ship Via FOB Tracking...
 Confirm To
 E-mail
 Fax No. Batch Fax
 Comment
 Salesperson Jim Kentley
 Split Comm. Split Comm...

Quick Print

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.

The screenshot shows the 'Job Masterfile Maintenance' window. At the top, the 'Job No.' is 'SMD1151' and the 'Description' is 'ABF-17 th Floor Buildout'. Below this are four tabs: '1. Main', '2. Job Status', '3. Change Orders', and '4. Billing History'. The 'Main' tab is active. The form contains several fields: 'Customer No.' (01-ABF), 'Job Address' (empty), 'Contact' (Artie Johnson), 'Phone' ((414) 555-4787), 'Extension' (219), 'Comment' (empty), 'Estimator' (empty), and 'Manager' (empty). There are also buttons for 'Cost Code...' and 'Renumber...'. The 'Job Status' is 'Open' with a dropdown arrow, and the 'Status Date' is '03/22/2013'. Other fields include 'Estimated Start Date', 'Estimated Completion Date', and 'Actual Start Date', all empty. The 'SORT FIELD' is empty. 'Retain Transaction Detail' is checked. 'Unit of Measure' is 'SQUARE FT'. 'Total SQUARE FT' is '0'. 'Calculate Sales Tax' is checked. At the bottom, there are navigation buttons (back, forward, search, etc.), 'Accept', 'Cancel', 'Delete', and a help icon. The status bar at the bottom right shows 'IIG SMD 10/8/2013'.

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.

Contract Data Entry (SMD) 10/8/2013

Contract No. 000000014 NTC

Customer... Credit...

1. Header | 2. Address | 3. Lines | 4. Tasks | 5. JC History

Contract Date 7/1/2013

Customer No. 01-ABF American Business Futures

Contract Type Prev. Maint. Job Site Code American Business Futures

Contract Status New Confirm To John Quinn

Start Date 7/1/2013 Comment

End Date 7/1/2014 Fax No.

Billing Type Time and Material E-mail artie@abf.com

Generation Document None PM Code M Monthly

Contract Amount From Header Number of Days 30 Last Task Gen. Date 7/1/2013

Bill Freq Code TaskType

All Materials Are Covered Nature of Task

All Labors Are Covered Total Fixed Hours 0 Used Hours 0:00

Documents Path

Contract Items Total Amount .00

Quick Print Generation Accept Cancel Delete

You can select any existing Contract from the lookup.

Cost Code Maintenance

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

Cost Type	Description	U/M	Bill Method	Completion Method	Unit Cost	Bill Rate
L	Labor	HOUR	Unit price	Units	25.00	25.00
M	Material	FEET	Non-billable	Cost	0.00	.00%
S	Subcontract		Non-billable	Cost	0.00	.00%
O	Overhead		Non-billable	Cost	0.00	.00%
B	Burden		Non-billable	Cost	0.00	.00%
E	Equipment		Non-billable	Cost	0.00	.00%

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:

A/P Invoice Data Entry (SMD) 10/8/2013

Vendor No. 01-AIRWAY
 Name Airway Property
 Invoice No. 011111

1. Header | 2. Lines

Quick Row 1

	Job Number	Cost Code	Type	Unit Cost	Units	Amount
1	SMD1151	002-122	Labor	25.00	2.00	50.00
2				.00	.00	.00

Contract Number: 000000014
 Job Code: 123-100-002

Distribution Balance 1,150.00 Total 50.00

Accept Cancel Delete [Print] [Help]

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:.

A/P Invoice Data Entry (SMD) 3/21/2013

Vendor No. 01-AIRWAY
 Name Airway Property
 Invoice No. 12222333

1. Header 2. Lines

Quick Row 1

	G/L Account	Amount	Comment
1	555-00-03	250.00	
2		.00	

Contract Number: 000000009
 Job Code: 420-000-000

Distribution Balance 0.00 Total 250.00

Accept Cancel Delete

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.

A/P Invoice Data Entry (SMD) 3/21/2013

Vendor No. 01-ALLCLIM
 Name Allclimate Maintenance
 Invoice No. 001233

1. Header 2. Lines

Quick Row 1

	Job Number	Cost Code	Type	Unit Cost	Units	Amount
1	SMD1150	002-122	Material	.00	.00	500.00
2				.00	.00	.00

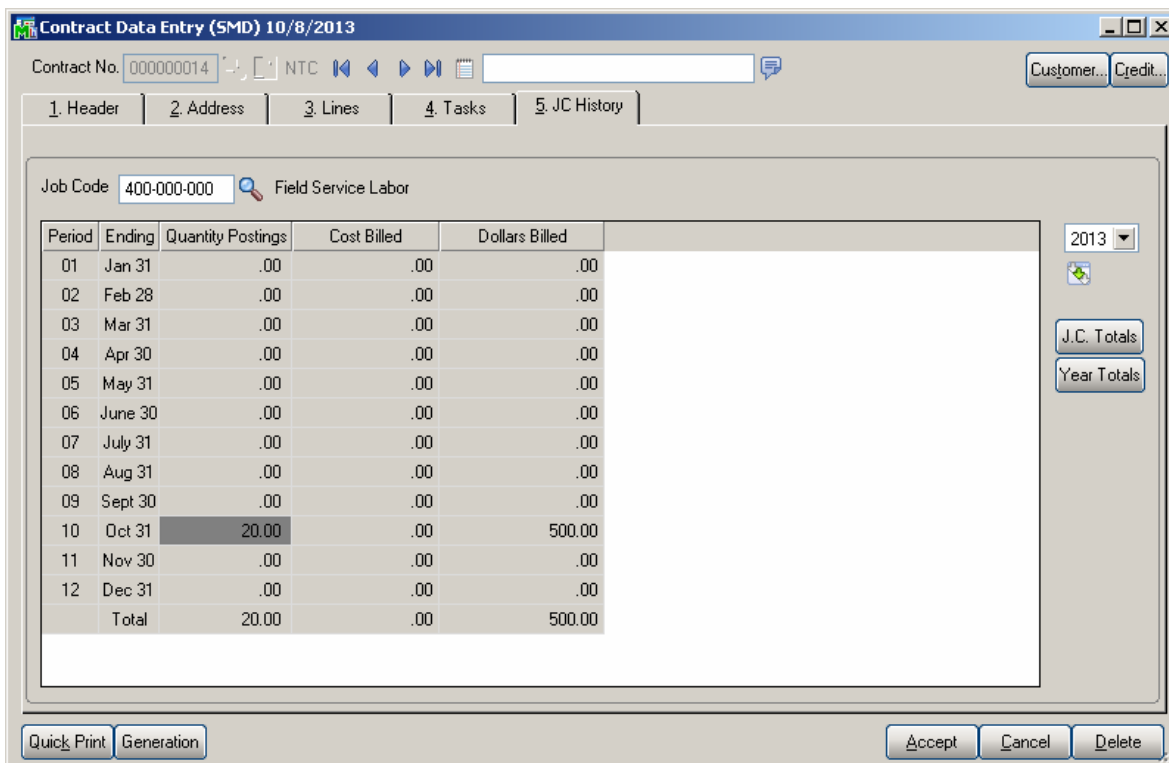
Contract Number 000000006
 Job Code 440-000-000

Distribution Balance 0.00 Total 500.00

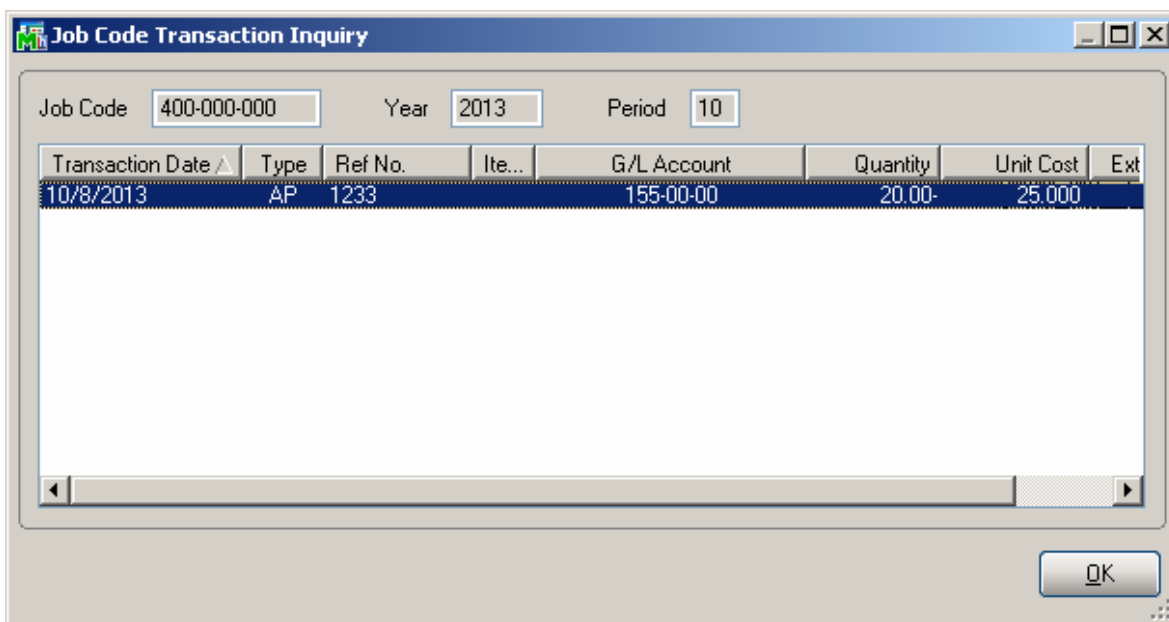
Accept Cancel Delete

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

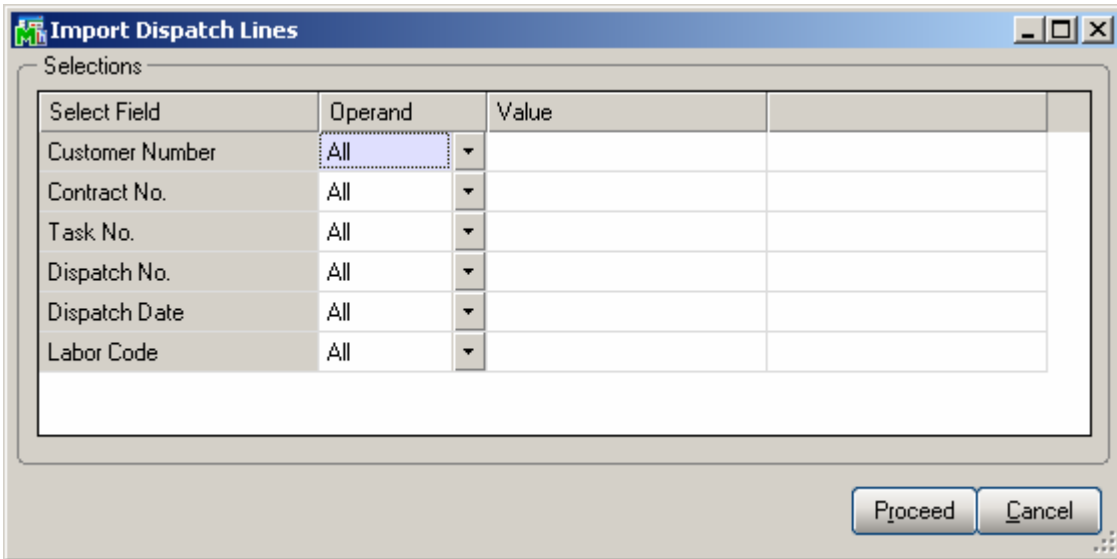
The **Contract No.** field on the **Job Masterfile Inquiry** screen shows the S/M **Contract No.** field.

Job Posting Entry

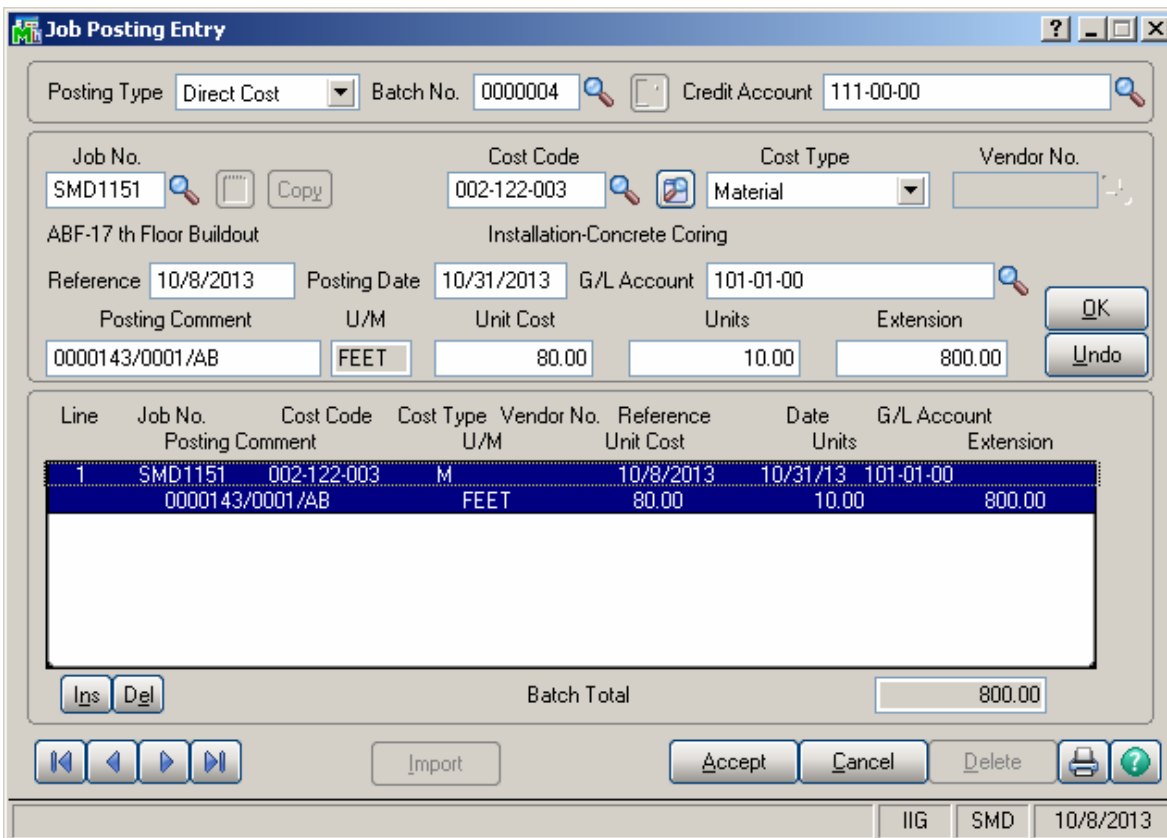
The **Import** button has been added to the **Job Posting Entry** screen. To enable this button, select **Direct Cost** as **Posting type**, specify the **Batch No.** and **Credit G/L Account** numbers.

The screenshot shows the 'Job Posting Entry' window. At the top, 'Posting Type' is set to 'Direct Cost', 'Batch No.' is '0000002', and 'Credit Account' is '111-00-00'. Below this, there are fields for 'Job No.', 'Cost Code', 'Cost Type', and 'Vendor No.'. A 'Reference' field is also present. The 'Posting Date' field is empty. The 'G/L Account' field is empty. The 'Posting Comment' field is empty. The 'U/M' field is empty. The 'Unit Cost' field is '0.00'. The 'Units' field is '0.00'. The 'Extension' field is '.00'. There are 'OK' and 'Undo' buttons. Below the form is a table with columns: Line, Job No., Cost Code, Cost Type, Vendor No., Reference, Date, G/L Account, and Extension. The table is currently empty. Below the table are 'Ins' and 'Del' buttons. The 'Batch Total' field is '.00'. At the bottom, there are navigation buttons (back, forward, etc.), an 'Import' button (circled in blue), 'Accept', 'Cancel', 'Delete', and a help icon. The status bar at the bottom right shows 'IIG', 'SMD', and '10/8/2013'.

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.

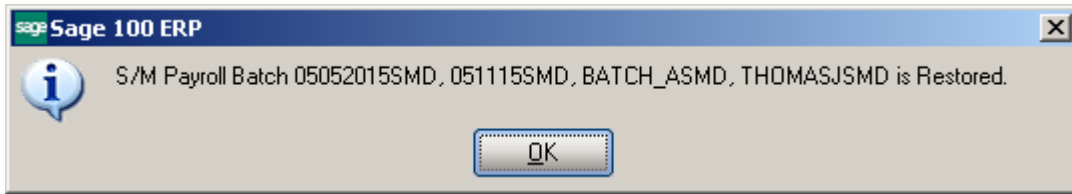
Select the batch created in the **Payroll Batch Entry**.

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

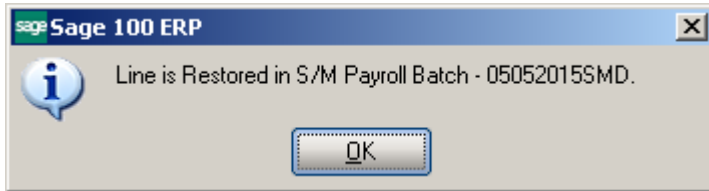
Line	E/D	Cd	ST	Loc	Dept	Labor Description	W/C Code	Rate	Hours	Amount
1	E	01	WI		11	Regular Warehouseperson	0000001	13.850	8.00	110.80
2	E	02	WI		11	Overtime Warehouseperson	0000001	20.775	11.65	242.03
3	E	03	WI		11	Doubletime Warehouseperson	0000001	27.700	1.34	37.12

Hours	Earnings	Vol Deduct	Taxes	Net Amount
20.99	389.95	.00	.00	389.95

If the generated Payroll Data Entries are **Cleared** in the **Pay Cycle** program (by the Clear button), corresponding batch (es) will be restored from the history.



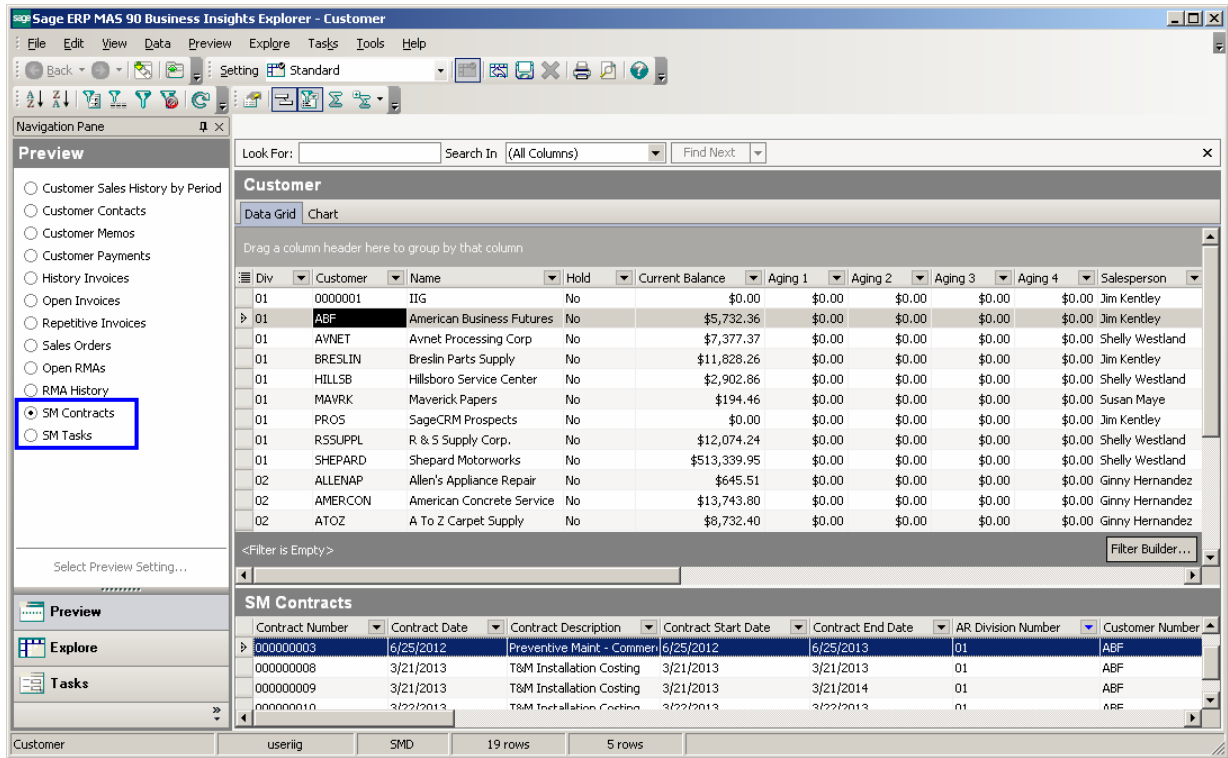
If a Payroll Data Entry is deleted the following message appears and the line is restored in the S/M Payroll Batch:



Business Insights Explorer

A/R Explore

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



The screenshot displays the Sage ERP MAS 90 Business Insights Explorer - Customer window. The interface includes a navigation pane on the left, a search bar at the top, and two main data grids. The 'Customer' grid shows a list of customer accounts with columns for Div, Customer, Name, Hold, Current Balance, and Aging. The 'SM Tasks' grid shows a list of tasks with columns for Task Number, Task Date, Task Description, Task Type, Task Status, Contract Number, AR Division Number, and Customer Number.

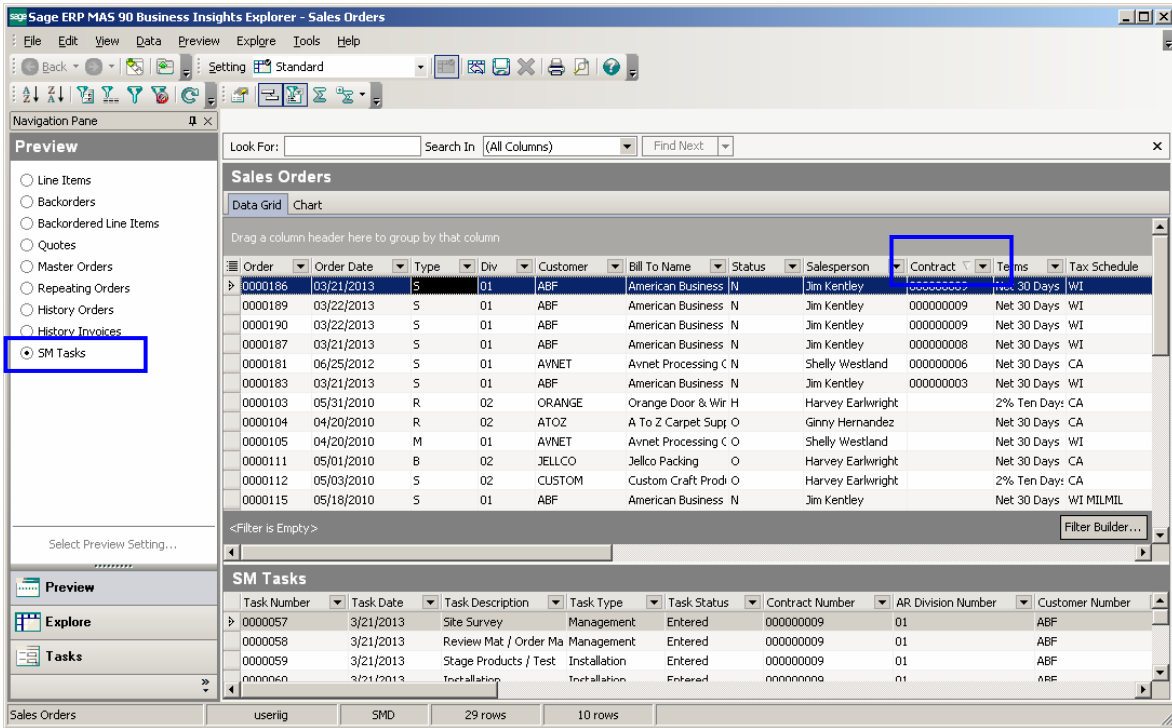
Div	Customer	Name	Hold	Current Balance	Aging 1	Aging 2	Aging 3	Aging 4	Salesperson
01	000001	IIG	No	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Jim Kentley
01	ABF	American Business Futures	No	\$5,732.36	\$0.00	\$0.00	\$0.00	\$0.00	Jim Kentley
01	AVNET	Avnet Processing Corp	No	\$7,377.37	\$0.00	\$0.00	\$0.00	\$0.00	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

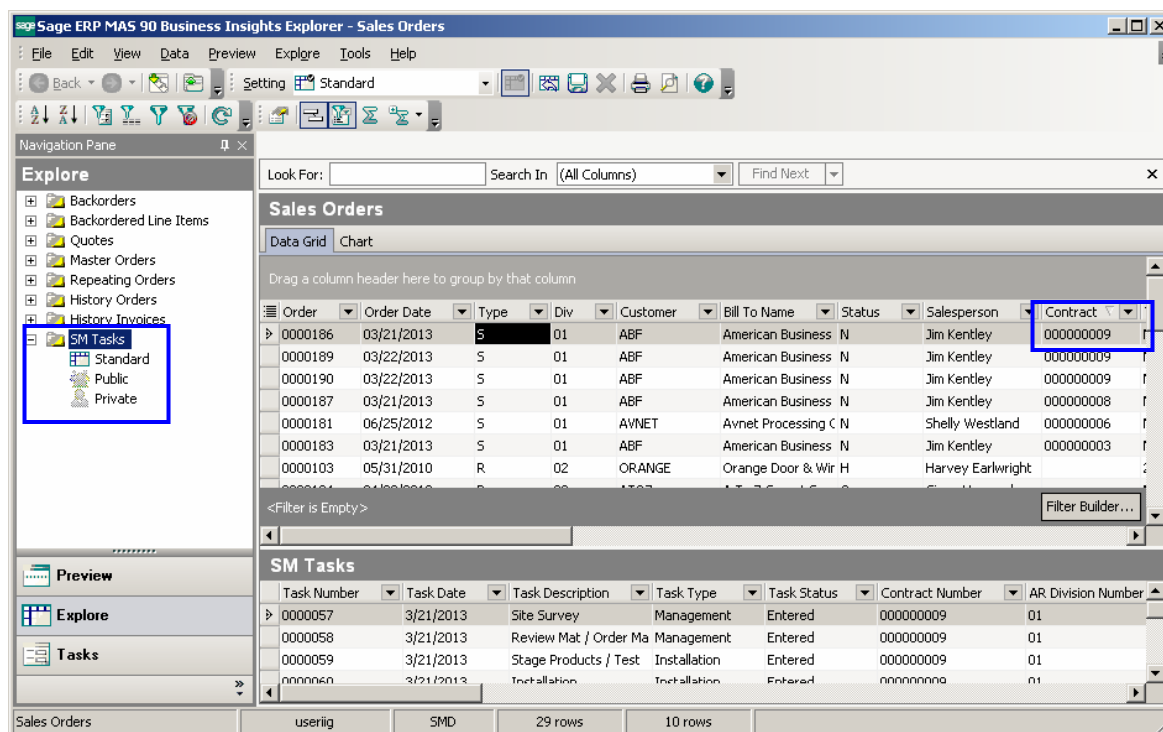
Task Number	Task Date	Task Description	Task Type	Task Status	Contract Number	AR Division Number	Customer Number
0000001	2/17/2012	System down	Service	Entered		01	ABF
0000009	6/25/2012	Customer called there	Service	Entered		01	ABF
0000010	6/25/2012	Site Survey	Management	Entered		01	ABF
0000011	6/25/2012	Review Mat / Order Ma. Management	Management	Entered		01	ABF

Customer: useriig 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**, **History Invoices**, **SM Contract Job Code Posting** or **SM Contract Job Code Transaction** radio button to display corresponding data in the Preview pane.

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

Sage 100 ERP Business Insights Explorer - SM Contracts

File Edit View Data Preview Explore Tools Help

Back Setting Standard

Navigation Pane

Preview

- SM Tasks
- SM Contract Details
- Sales Orders
- History Invoices
- SM Contract Job Code Posting
- SM Contract Job Code Transaction

Select Preview Setting...

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 Number	Customer Number
00000001	2/26/2002	3rd Party on-site mixed dev	2/26/2002	2/26/2016	02	ALLENAP
00000004	2/26/2002	Install driver	2/26/2002	4/26/2011	02	ATOZ
00000006	2/26/2002	Installation of software	2/26/2002	2/6/2017	02	ORANGE
00000008	2/26/2002	Replacement	2/26/2009	11/26/2014	01	RSSUPPL
00000009	2/26/2002	Install driver	2/26/2012	2/26/2015	02	CAPRI
00000010	2/26/2002	Warranty life	2/26/2002	4/26/2015	02	JELLCO
00000011	2/26/2002	Training	5/26/2002	3/10/2012	02	ORANGE
00000012	2/26/2002	Initial upgrade and downlo	2/26/2002	2/26/2016	02	JELLCO
00000013	2/26/2002	Inspection	4/26/2002	2/26/2010	02	ALLENAP
00000014	2/26/2002	Building	2/26/2002	2/26/2018	01	ABF
00000016	2/26/2002	Customer Managemen	2/26/2002	2/26/2016	01	ABF

<Filter is Empty> Filter Builder...

SM Tasks

Task Number	Task Date	Task Description	Task Type	Task Status	Contract Number	AR Division Number	Customer Number	Bill
0000411	3/12/2009	Customer called to fix z	Service Call	Entered	00000001	02	ALLENAP	Alle
0000825	10/16/2013		Service Call	Entered	00000001	02	ALLENAP	Alle
0000843	2/14/2014	3rd Party on-site mixed	Installation	Entered	00000001	02	ALLENAP	Alle
0000891	4/3/2014		Installation	Entered	00000001	01	ABF	Am
0000981	7/31/2014		Installation	Entered	00000001	02	ALLENAP	Alle

SM Contracts Userlog SMD 135 rows 5 rows

Dispatch View

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

The screenshot displays the Sage 100 ERP Business Insights Explorer interface for 'SM Dispatches'. The main window is titled 'Sage 100 ERP Business Insights Explorer - SM Dispatches'. The interface includes a menu bar (File, Edit, View, Data, Preview, Explore, Tools, Help), a toolbar, and a navigation pane on the left with options for 'Preview', 'Explore', and 'Tasks'. The 'Preview' pane shows 'SM Dispatch Lines' selected. The main area contains a 'Data Grid' with the following columns: Task Number, Dispatch Number, AR Division Number, Customer Number, Dispatch Date, Dispatch Status, Start Date, End Date, and Technician. The data grid lists several dispatch records, including those for customer 'ORANGE' and 'ABF'. Below the data grid is a 'Filter Builder' section. The 'SM Dispatch Lines' table below the grid has columns: Item Code, Item Code Description, Commissionable, Warehouse Code, Unit of Measure, Tax Class, Line Discount Percent, and Unit Price. The table shows a hierarchy starting with 'D1400 // KIT ITEM ENTERED Door Installation' and listing specific items like 'D1000-BBW/LIGH BOOK BIN W/FLUORESCENT' and 'D1000-LHDS DESK DRAWER SET - LEFT H/2'.

Task Number	Dispatch Number	AR Division Number	Customer Number	Dispatch Date	Dispatch Status	Start Date	End Date	Technician
0000017	0005	02	ORANGE	9/8/2009	Closed	2/26/2002	9/8/2009	ADAM
0000017	0006	02	ORANGE	10/13/2009	Open	2/26/2002	10/13/2009	ADAM
0000017	0007	02	ORANGE	9/10/2013	Closed	2/26/2002	9/10/2013	ADAM
0000017	0008	02	ORANGE	9/10/2013	Closed	2/26/2002	9/10/2013	ADAM
0000017	0009	02	ORANGE	9/10/2013	Closed	2/26/2002	9/10/2013	ADAM
0000017	0010	02	ORANGE	9/10/2013	Closed	2/26/2002	9/10/2013	ADAM
0000020	0001	01	ABF	2/26/2002	Open	2/26/2002	2/26/2002	WILL
0000020	0002	01	ABF	2/26/2002	Open	2/26/2002	2/28/2002	ROBI
0000020	0003	01	ABF	2/25/2009	Open	1/14/2010	1/14/2010	SANT
0000020	0004	01	ABF	2/25/2009	Closed	2/25/2009	2/25/2009	WILL
0000020	0005	01	ABF	1/27/2010	Open	2/26/2002	1/27/2010	ADAM

Item Code	Item Code Description	Commissionable	Warehouse Code	Unit of Measure	Tax Class	Line Discount Percent	Unit Price
/C						0.000%	\$0.00
D1400	// KIT ITEM ENTERED Door Installation						
D1000-BBW/LIGH	BOOK BIN W/FLUORESCENT	Yes	000	EACH	TX	0.000%	\$130.00
D1000-LHDS	DESK DRAWER SET - LEFT H/2	Yes	000	EACH	TX	0.000%	\$140.00
D1000-LOCK	LOCK SET FOR D1000 DRAW	Yes	000	EACH	TX	0.000%	\$30.00
D1000-RHDS	DESK DRAWER SET - RIGHT H/2	Yes	000	EACH	TX	0.000%	\$140.00

SM Dispatches

Task Number	Dispatch Number	AR Division Number	Customer Number	Dispatch Date	Dispatch Status	Start Date	End Date	Technician
0000017	0010	02	ORANGE	9/10/2013	Closed	2/26/2002	9/10/2013	ADAM
0000020	0001	01	ABF	2/26/2002	Open	2/26/2002	2/26/2002	WILL
0000020	0002	01	ABF	2/26/2002	Open	2/26/2002	2/26/2002	ROBI
0000020	0003	01	ABF	2/25/2009	Open	1/14/2010	1/14/2010	SANT
0000020	0004	01	ABF	2/25/2009	Closed	2/25/2009	2/25/2009	WILL
0000020	0005	01	ABF	1/27/2010	Open	2/26/2002	1/27/2010	ADAM
0000020	0006	01	ABF	9/10/2013	Closed	2/26/2002	9/10/2013	WILL
0000020	0007	01	ABF	9/10/2013	Closed	2/26/2002	9/10/2013	WILL
0000020	0008	01	ABF	9/10/2013	Closed	2/26/2002	9/10/2013	WILL
0000025	0001	02	ORANGE	2/26/2002	Open	2/26/2002	2/27/2002	ROBI
0000025	0002	02	ORANGE	2/26/2002	Open	2/26/2002	2/26/2002	WILS

SM Labor Charge Lines

Labor/Skill Code	Technician Code	Description	Tax Class	Overtime	Hours Spent	Billing Rate	Discount %	Overtime Factor
BUILD	ROBI	Building Services		No	5.00	\$35.00	0.000%	
BUILD	WILS	Building Services		No	20.00	\$18.00	0.000%	

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.

SM Contracts

Contract Number	Contract Date	Contract Description	Contract Start Date	Contract End Date	AR Division Num
000000075	9/28/2013		9/28/2013	9/28/2014	01
000000077	10/1/2013	Template Contract	10/1/2013	10/1/2015	01
000000078	10/1/2013	Template Contract	10/1/2013	10/1/2015	01
000000080	10/2/2013		10/2/2013	10/15/2015	01
000000083	10/3/2013		10/3/2013	10/3/2013	01

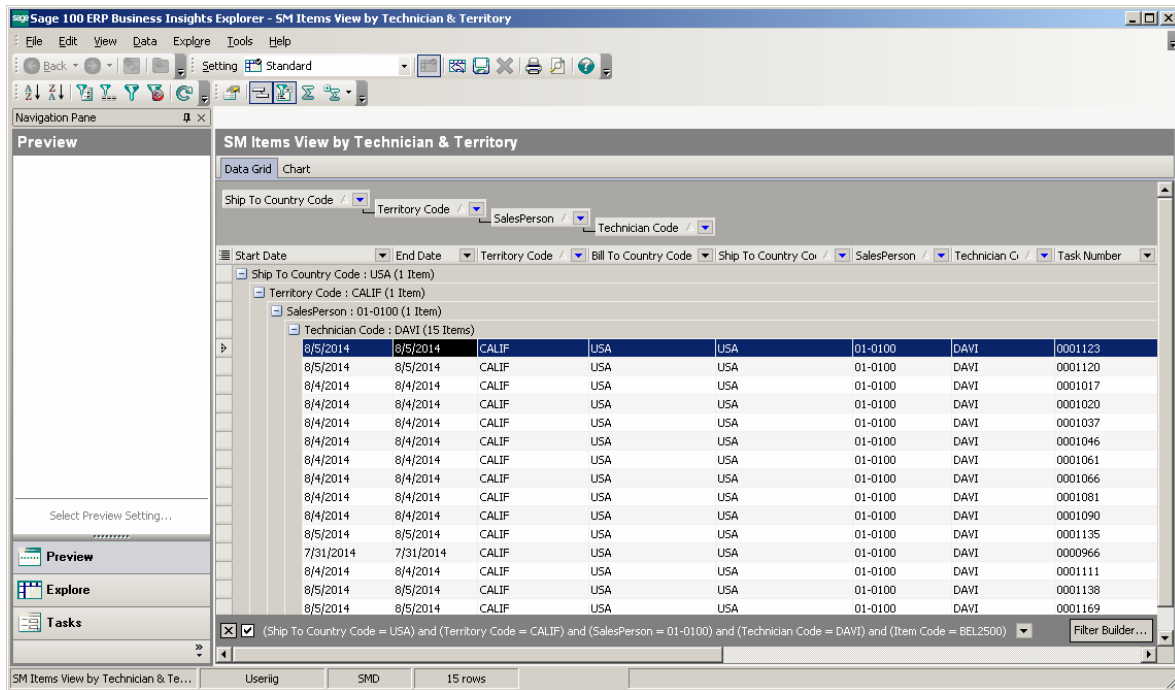
SM Contract Job Code Posting

Contract Number	Job Code	Fiscal Year	Fiscal Period	Quantity Postir	Cost Billed	Dollars Billed
000000080	455000000	2013	10	0	0	0
000000080	500000000	2013	10	2	1032.5	9500
000000080	OPTION000	2013	10	13	907.5	28050

SM Contracts | userilg | ABC | 74 rows | 3 rows

Items by Technician and Territory

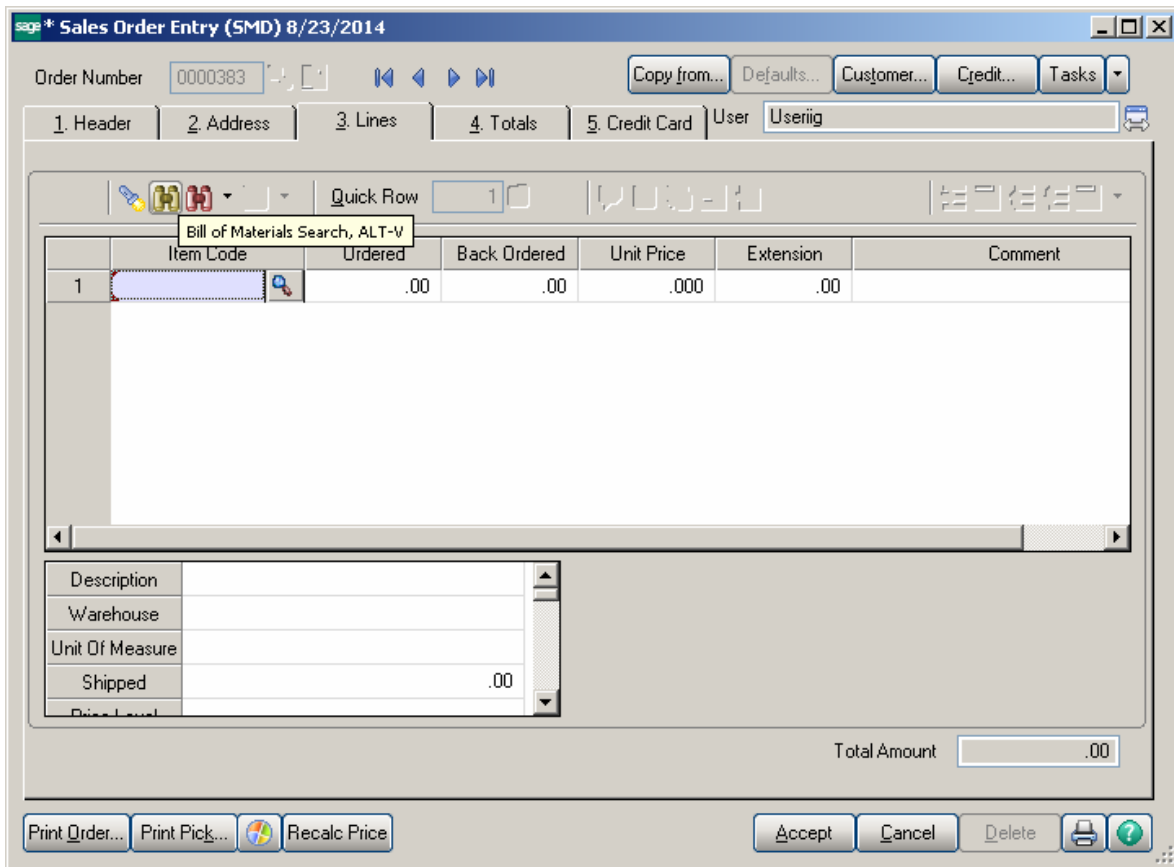
Select the **Items by Technician and Territory** view to easily get information about the S/M Items by the **Ship To Country Code**, **Territory Code**, **Technician** and **Salesperson**.



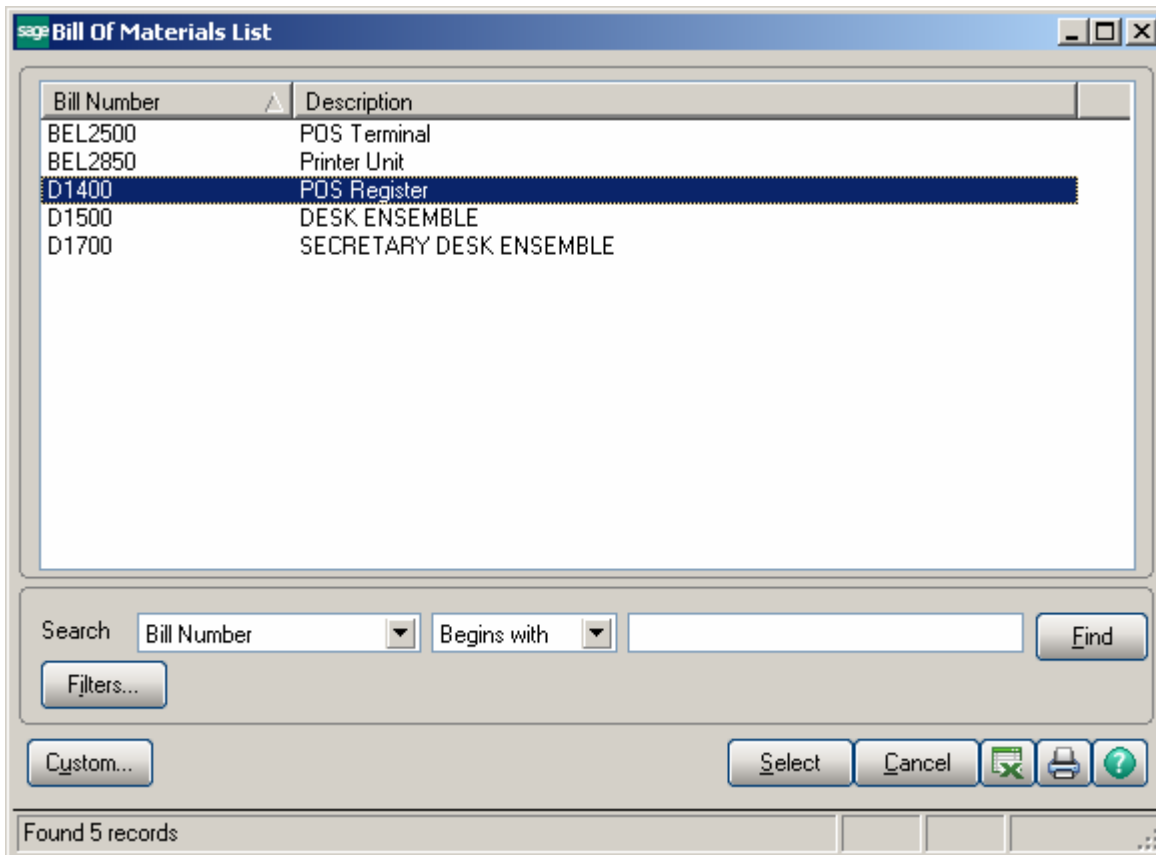
Examples

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

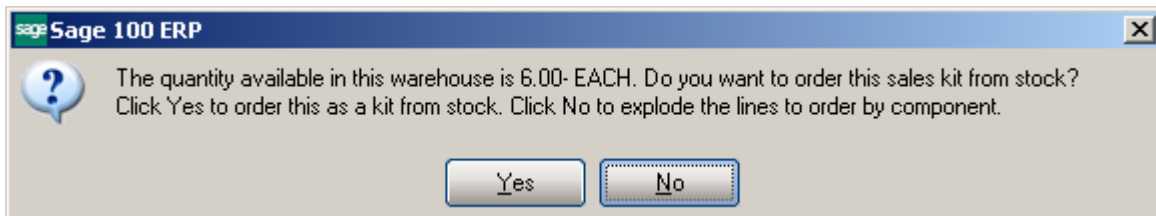
Example:



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

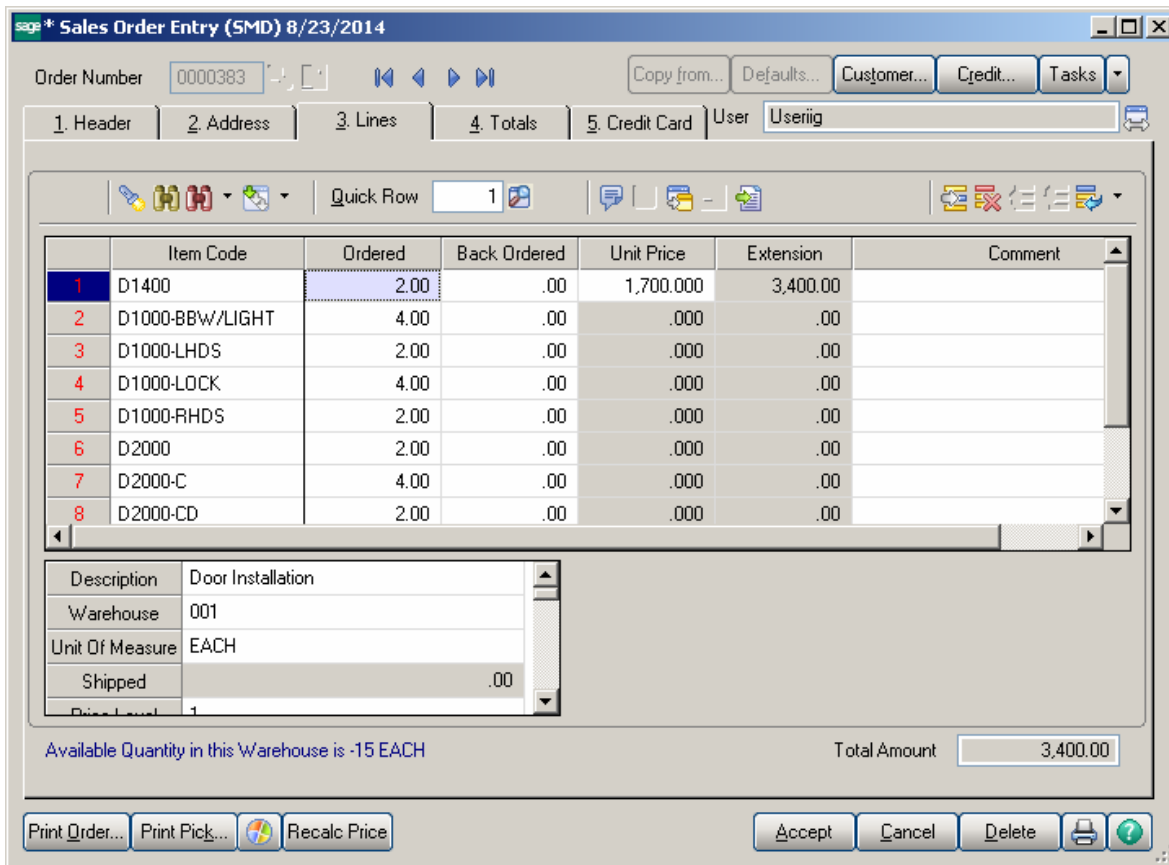


The following message box will be displayed.



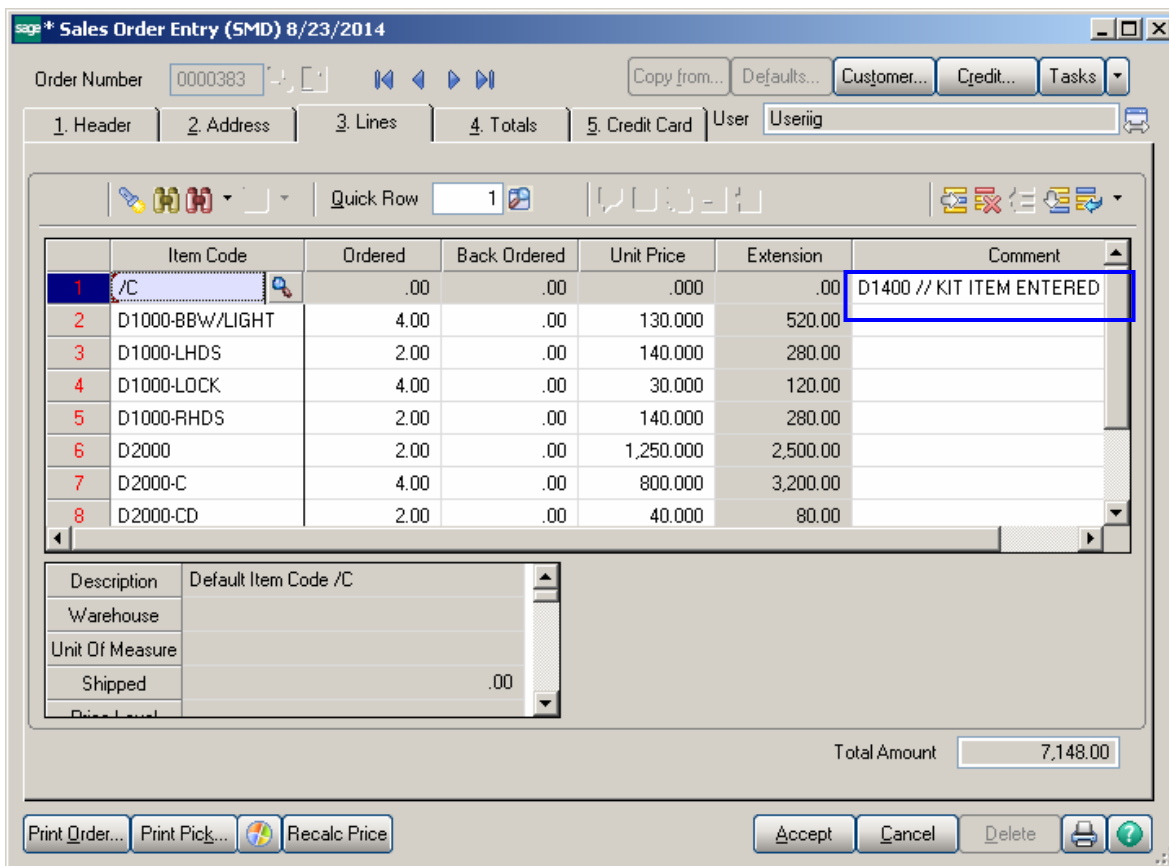
Click **No**.

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.

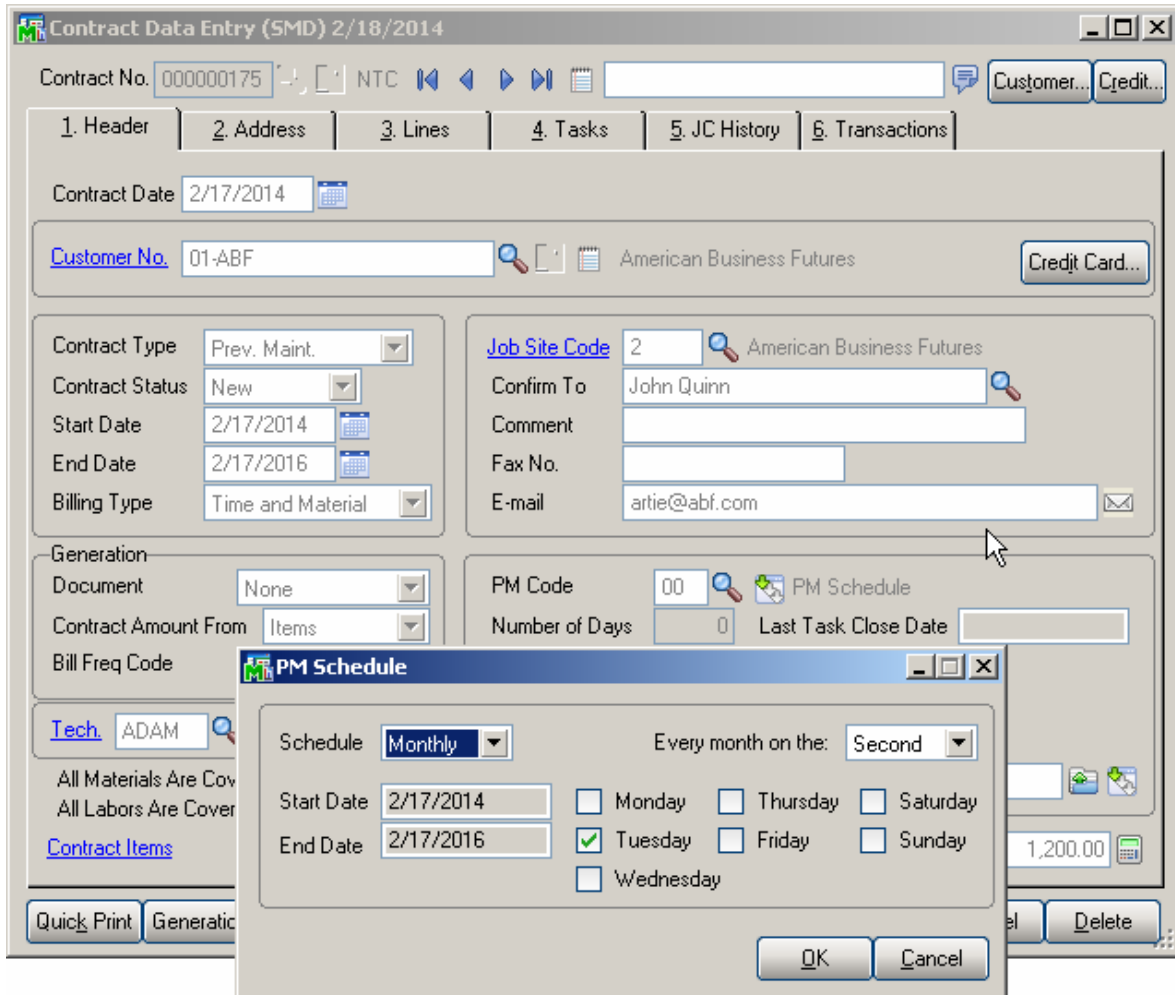


All the kit components are loaded as regular line items with appropriate price and extension information.

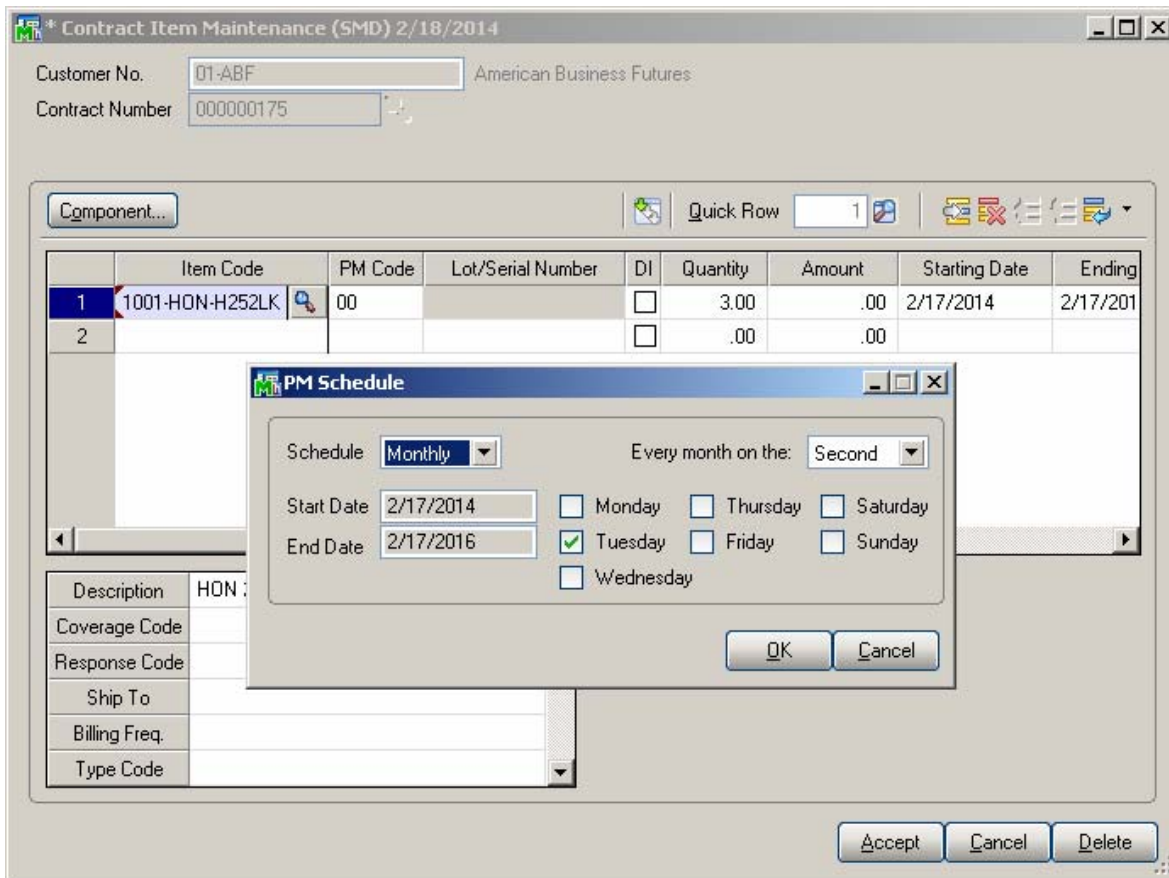
Auto Generate Task Based on PM Schedule

Contract Data Entry

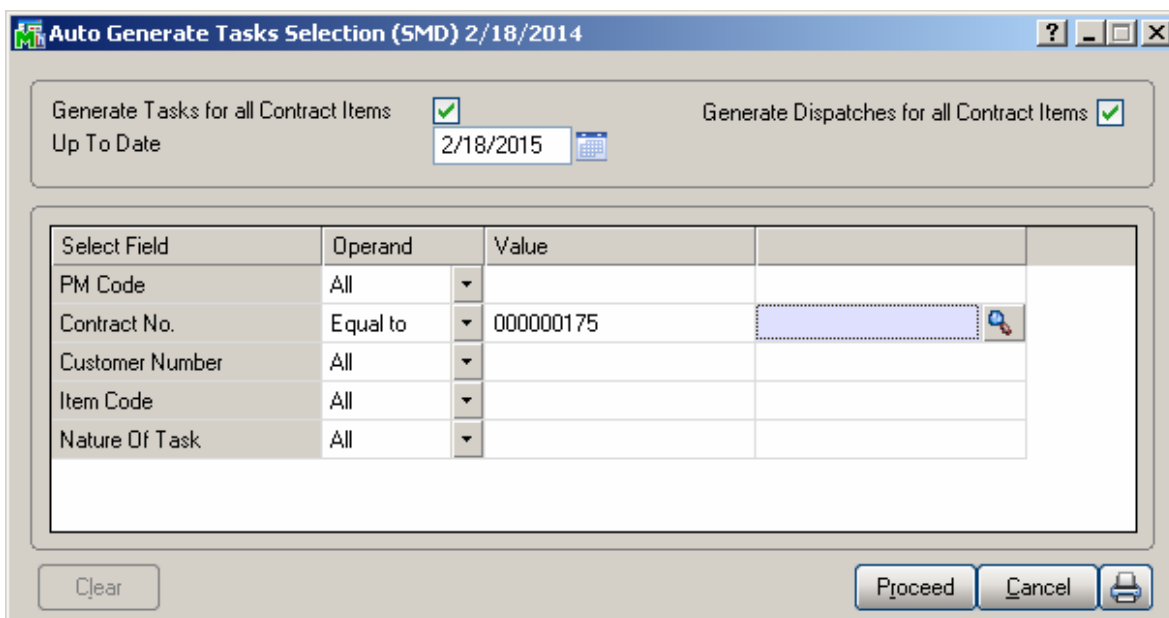
Here is an example of PM Contract with a schedule (2-nd Tuesday of each month) created for preventative maintenance tasks. Based on this schedule preventive maintenance tasks will be generated each month on the 2-nd Tuesday.



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:

View 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-HQN-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):

View 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	9/8/2014	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-HQN-H252LK		Item
000000175	00	4/8/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	5/13/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	6/10/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	7/8/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	8/12/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	9/8/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	10/14/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	11/11/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	12/9/2014	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	1/13/2015	01-ABF	American Business Futures	1001-HQN-H252LK		Item
000000175	00	2/10/2015	01-ABF	American Business Futures	1001-HQN-H252LK		Item

All the Tasks being generated are scheduled respectively for the 2-nd Tuesday of each month: 03/1/2014, 4/8/2014, 5/13/2014, etc.

Here is the first Task generated:

Task Data Entry (SMD) 2/18/2014

Task No. 0000855 | User useriig

1. Header | 2. Address | 3. Dispatches

Task Date 2/18/2014 | Task Time 05:07 PM | Task Type I Installation

Customer No. 01-ABF | American Business Futures | Credit Card...

Task Status E Entered | Salesperson 0100 Jim Kentley

Contract No. 000000175

Job Site Code 2 | American Business Futures | Cust PO

Job Site Contact John Quinn | Priority Code

Nature of Task PROGRAM | Install Program | Bill Freq Code 1

Preferred Tech. ADAM | Adams Arnold

Item Number

Lot/Serial No. | Territory ARIZON | Region Arizona

Tax Schedule WI | Wisconsin | Separate Invoice

Response | Schedule Date 3/11/2014 | Time 05:07 PM

Coverage | Due Date 3/11/2014 | Time 05:07 PM

Quote Amount .00 | Quote Hours .00

Quick Print | BMA | Accept | Cancel | Delete

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

Here is the Dispatch created during Task Generation:

Dispatch Data Entry (SMD) 2/18/2014

Task No. 0000856

Dispatch No. 0001

User useriig

1. Header 2. Lines

Dispatch Date 2/18/2014

Dispatch Status 0 Open

Starting Date 3/11/2014 Starting Time 05:07 PM Commit Quantity

Ending Date 3/11/2014 Ending Time 05:07 PM

Technician ADAM Adams Arnold

Quick Print Labor Accept Cancel Delete

The Components assigned to the Contract item in the Contract Entry are loaded into the Dispatch Lines:

Dispatch Data Entry (SMD) 2/18/2014

Task No. 0000856

Dispatch No. 0001

User useriig

1. Header 2. Lines

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	

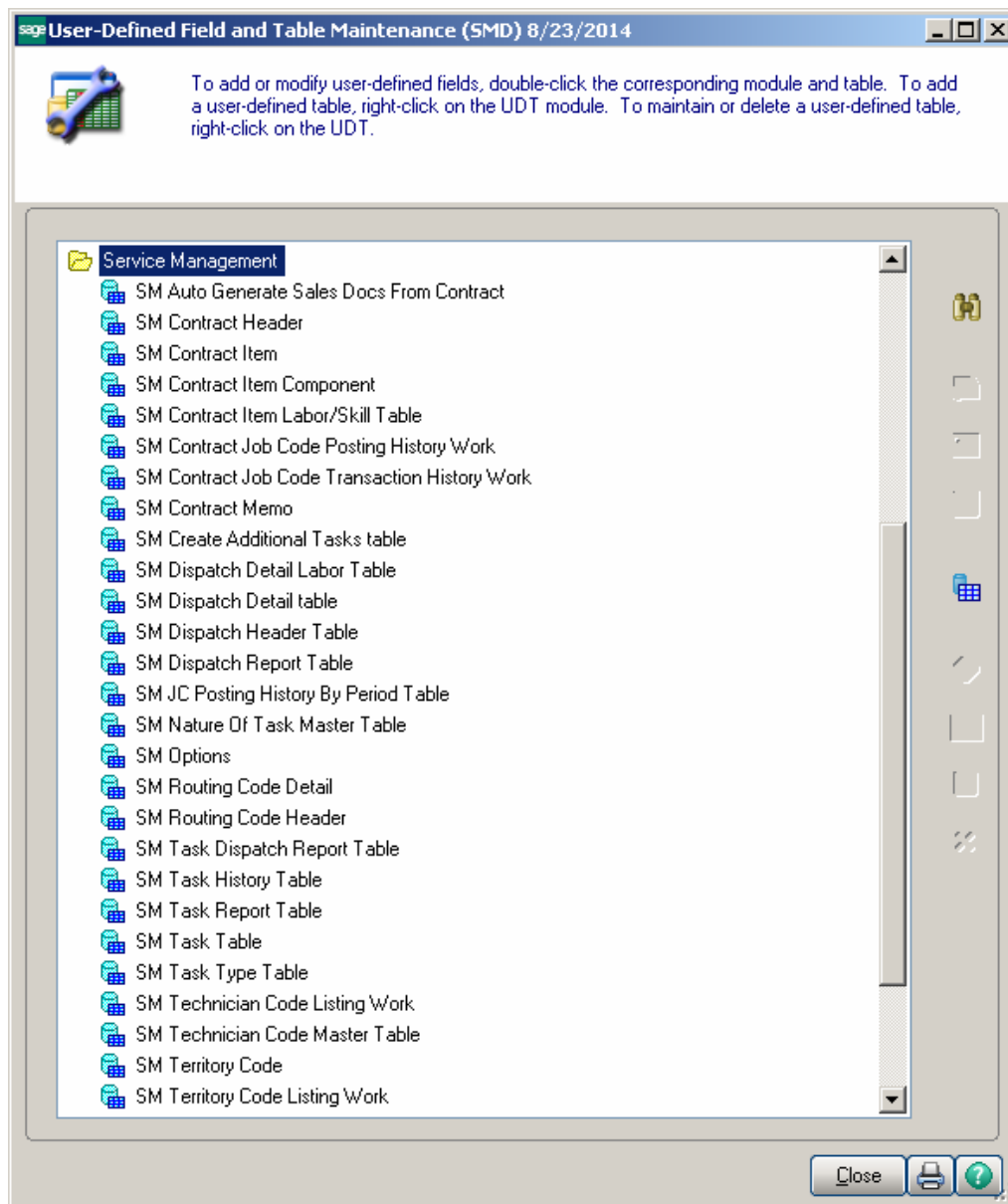
Description	PAPER CADDY 18"W 14"D 3"H
Warehouse	000
Unit Of Measure	EACH
Price Level	1

Total Amount 269.00

Quick Print Labor Accept Cancel Delete

Custom Office

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

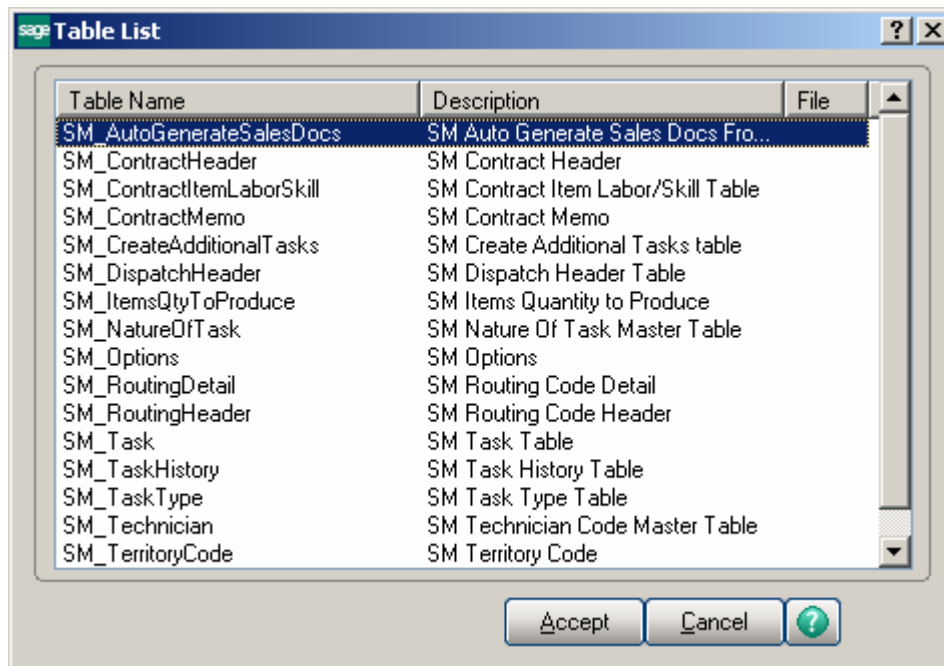


Note: When adding a UDF field in the SM Task Table, at the same time it is necessary to add the same UDF (with the same name, size) also in the SM Task HistoryTable.

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: